

# Consumer Demand Project 2019

## Germany Market Fact Sheet



### Current German Visitation and Expenditure in Australia<sup>1</sup>

In the year ending September 2019, there were 197,000 German visitors to Australia, who stayed 7.8m nights. German visitor spend in Australia was stable (-0.8 per cent) to \$694.0m during the same period.



**\$694.0m** spend  
-0.8% year-on-year



**197,000** visitors  
-1.4% year-on-year



**7.8m** nights  
-12.4% year-on-year

### Factors of importance when choosing holiday destination

Compared to other international markets, German travellers prioritise world class natural beauty and wildlife, value for money and friendly and open citizens when considering holiday destinations.

#### Top five importance factors

% ranking each factor in their top five most important



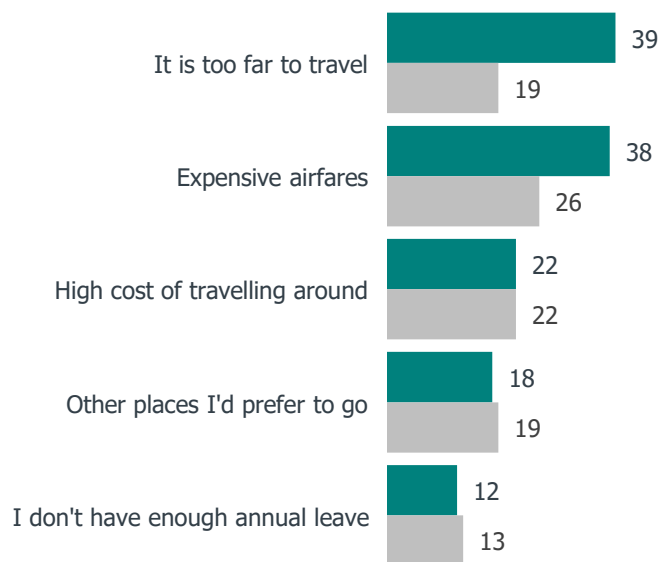
% German travellers (%) 11 Market total<sup>2</sup>

### Barriers to visiting Australia

German travellers are more than twice as likely as other markets to consider the distance to Australia as a barrier to visitation. Cost of airfares is the second largest barrier.

#### Top five barriers to visiting Australia

% of those not intending to visit Australia



■ German travellers ■ 11 Market total<sup>2</sup>

### Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

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### Current German Visitation and Expenditure in Queensland<sup>1</sup>

German visitation to Queensland declined by 3.8 per cent to 81,000 and nights decreased by 18.0 per cent to 1.9m in the year ending September 2019. Overnight Visitor Expenditure (OVE) by Germans also declined, down 17.4 per cent to \$156.0m across the same period.



**\$156.0m** spend  
-17.4% year-on-year



**81,000** visitors  
-3.8% year-on-year



**1.9m** nights  
-18.0% year-on-year

### Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked highest amongst German travellers for experience awareness, and second for consideration, intention to visit and visitation.

#### Queensland's competitive rankings<sup>3</sup>

ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) <sup>4</sup>	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

**How to read this:**  
German travellers rank Queensland 2<sup>nd</sup> out of Australian states and territories for consideration

■ 2018 rank ■ 2019 rank

#### Australia's competitive rankings - German market

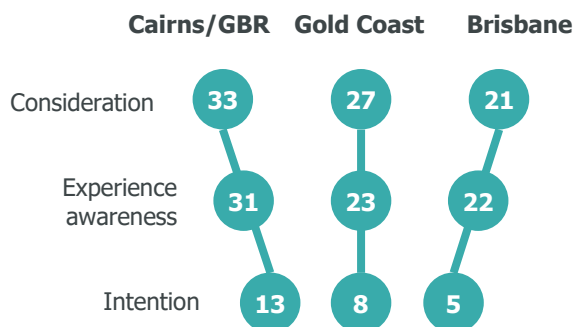
ranking against other international destinations



**How to read this:** Australia comes 10<sup>th</sup> in the list of destinations German travellers intend to visit, but ranks 14<sup>th</sup> in terms of actual visitation

#### Queensland destinations - German market

% of travellers who are considering Australia



**How to read this:** 27% of German travellers considering visiting Australia have considered visiting the Gold Coast, but only 8% intend to actually visit

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)  
<sup>3</sup> INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany  
<sup>4</sup> Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

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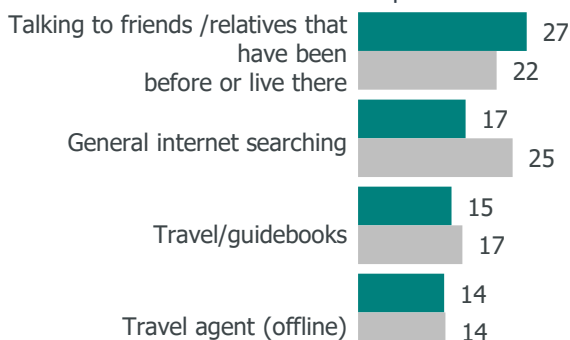
### Sources for travel planning

Compared to the 11 market total, German travellers are more likely to use offline channels during the travel booking cycle. They are also more likely than other travellers to talk to friends and relatives as a source of inspiration for their next trip.

Flights, tours, and accommodation are most commonly booked through offline travel agents.

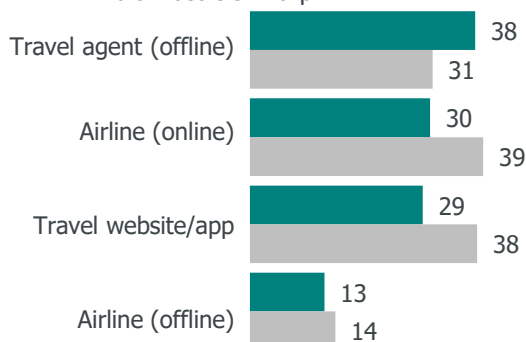
### Sources of inspiration for last trip

% on last OOR<sup>5</sup> trip



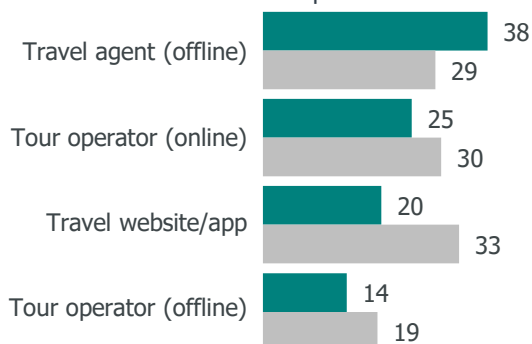
### Sources used to book flights for last trip

% on last OOR<sup>5</sup> trip



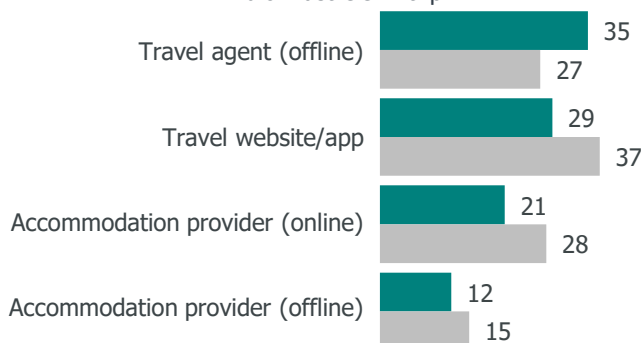
### Sources used to book tours for last trip

% on last OOR<sup>5</sup> trip

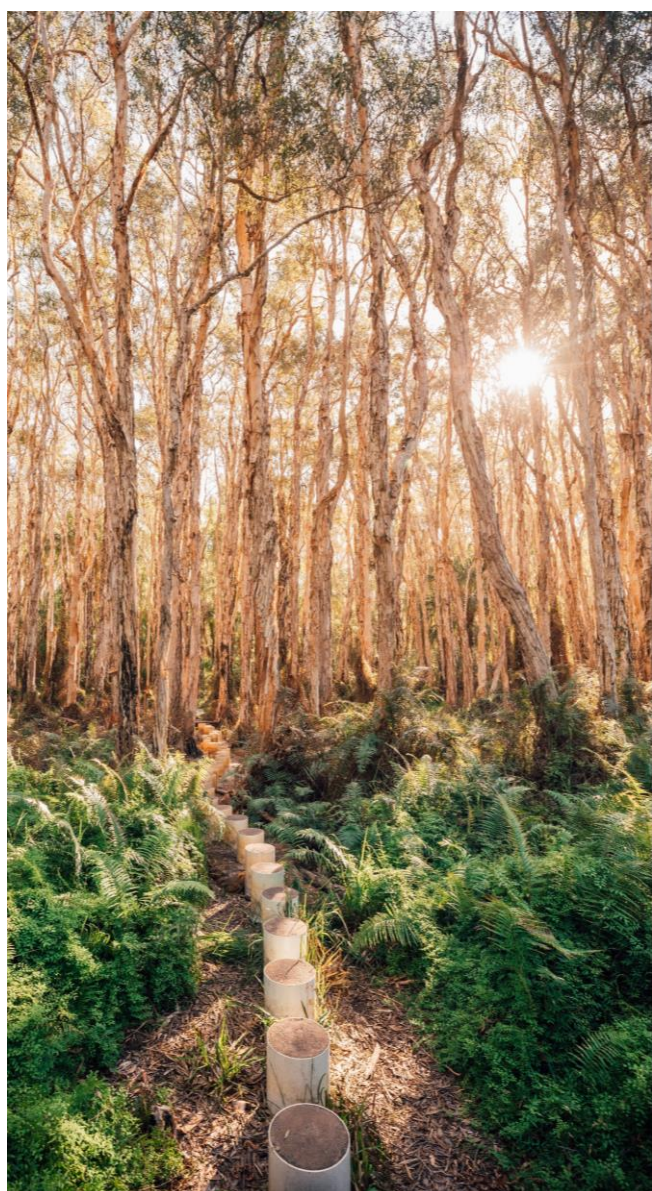


### Sources used to book accommodation for last trip

% on last OOR<sup>5</sup> trip



■ Germany travellers    ■ 11 Market total<sup>2</sup>



<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

<sup>5</sup> OOR Trip – Out of Region Trip (German travelling outside Europe or North Africa)