



International Visitor Profile

Germany

Visitor Profile 2007

Germany Visitor Summary

- In 2007 there were 151,583 visitors to Australia, an increase of 2% from the previous year, rating Germany as Australia's ninth largest inbound market for arrivals.
- The average length of stay for German visitors in 2007 was 46 nights, much higher than the average of 30 nights for all visitors.
- Travellers from Germany accounted for 4% of all international visitor nights in Australia in 2007.
- Germany is Australia's eight largest source market in terms of total expenditure. In 2007 travellers from Germany spent a total of \$943 million on trips to Australia, with an average expenditure of \$6,453 per trip.
- In 2007, 50% of German visitor nights were spent in dispersed areas, that is outside the major gateways of Sydney, Melbourne, Brisbane and Perth.

This section contains detailed information on visitors from Germany including:

- Visitor Arrivals
- Travel Party
- Demographics
- Seasonality
- Duration of Stay
- Destination Visited
- Leisure Activities
- Expenditure
- Planning and Booking Horizons
- Information Sources
- Internet Usage

The latest forecasts for this market from Tourism Forecasting Committee can be accessed on www.TRA.Australia.com

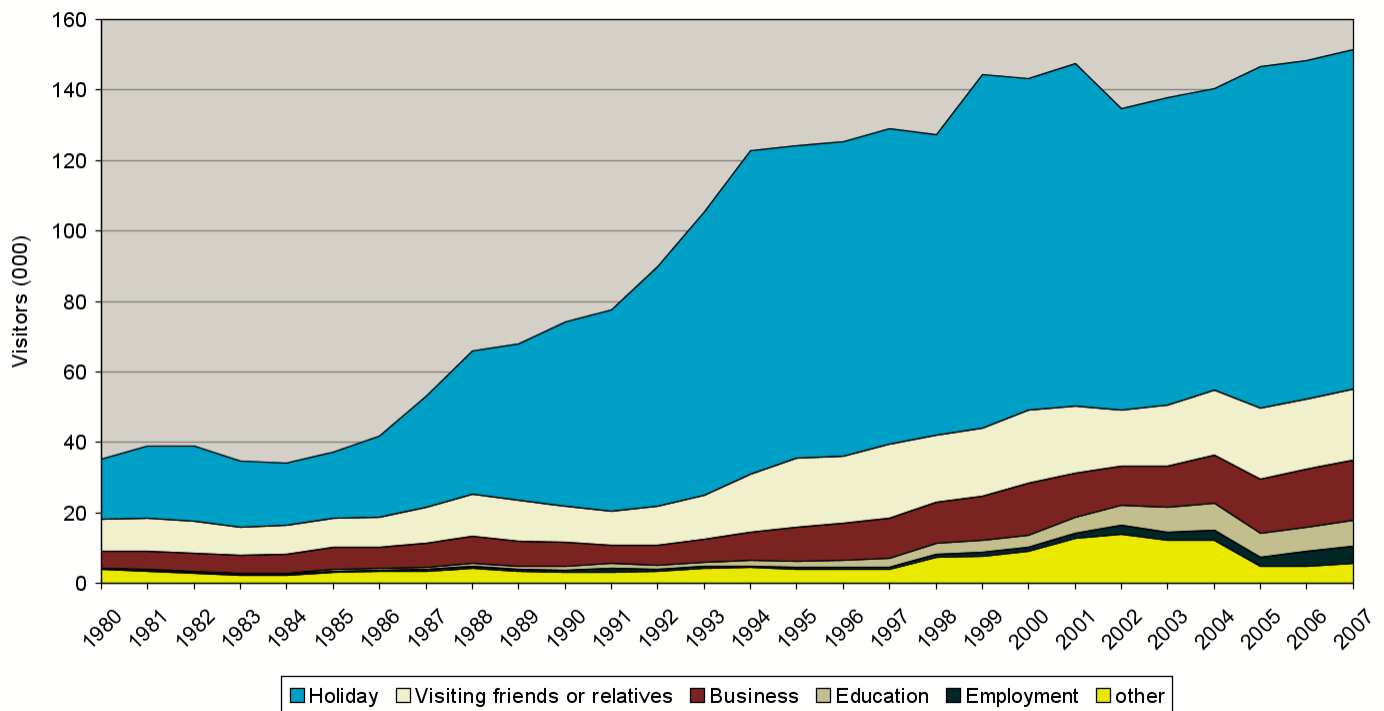
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Visitor Arrivals

- In 2007, the number of visitors from Germany totalled 151,583, four times the 35,383 arrivals in 1980 (Figure 1). Germany is currently Australia's ninth largest inbound tourist market.
- In 2007, 96,298 visitors came for a holiday, 20,373 came to visit friends and relatives, 17,044 on business, 4,602 for employment, 7,398 for education and 5,867 for other purposes.
- Over the decade from 1998 to 2007, the annual average growth rate for visitors from Germany was 2%.
- Total visitor arrivals from Germany increased by 2% in 2007
- In 2007, 40% or 58,319 of all visitors from Germany were repeat visitors (Figure 2). This is lower than the average of 57% across all markets.

Figure 1 - Visitors from Germany by main purpose of visit 1980 - 2007



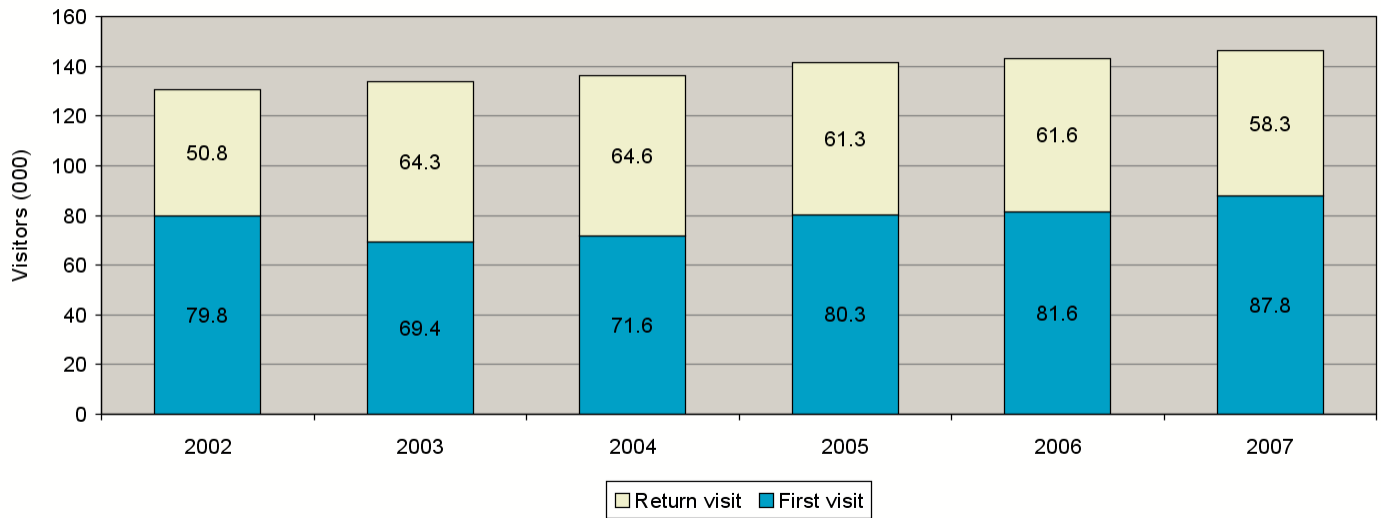
Source: Australian Bureau of Statistics, Overseas Arrivals and Departures Data [Cat. 3401.0]

Base : All international visitors

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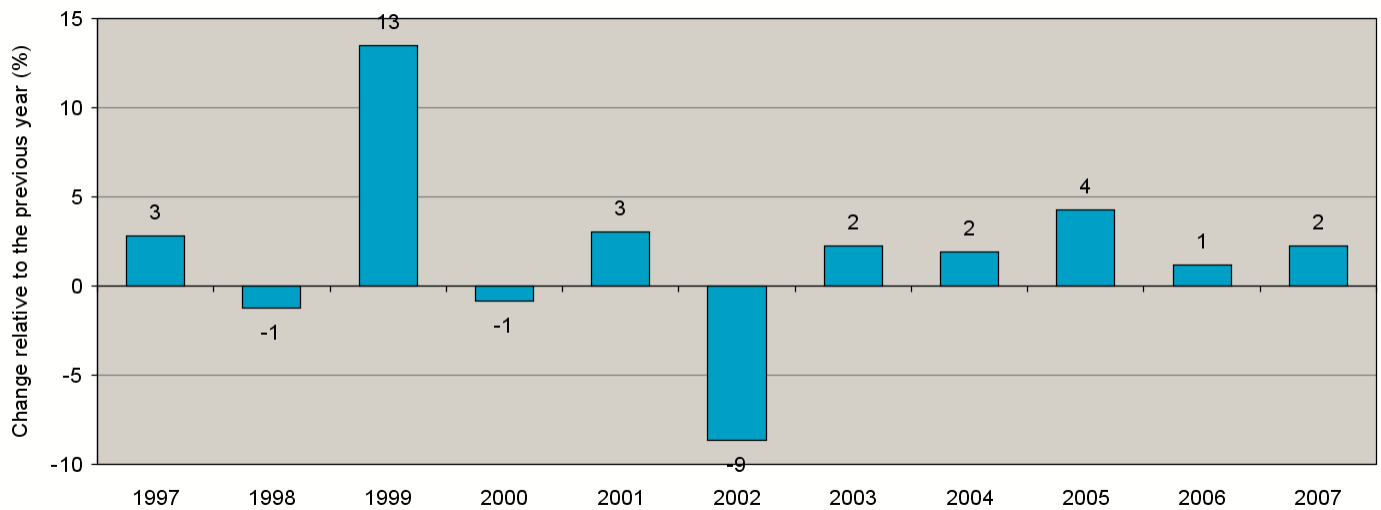
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Figure 2 - Visitors from Germany by first or return visit 2002 - 2007



Source: Tourism Research Australia, International Visitor Survey
 Base : All International visitors aged 15 years and over

Figure 3 - Change in visitors from Germany 1997 - 2007



Source: Australian Bureau of Statistics, Overseas Arrivals and Departures Data [Cat. 3401.0]
 Base : All international visitors

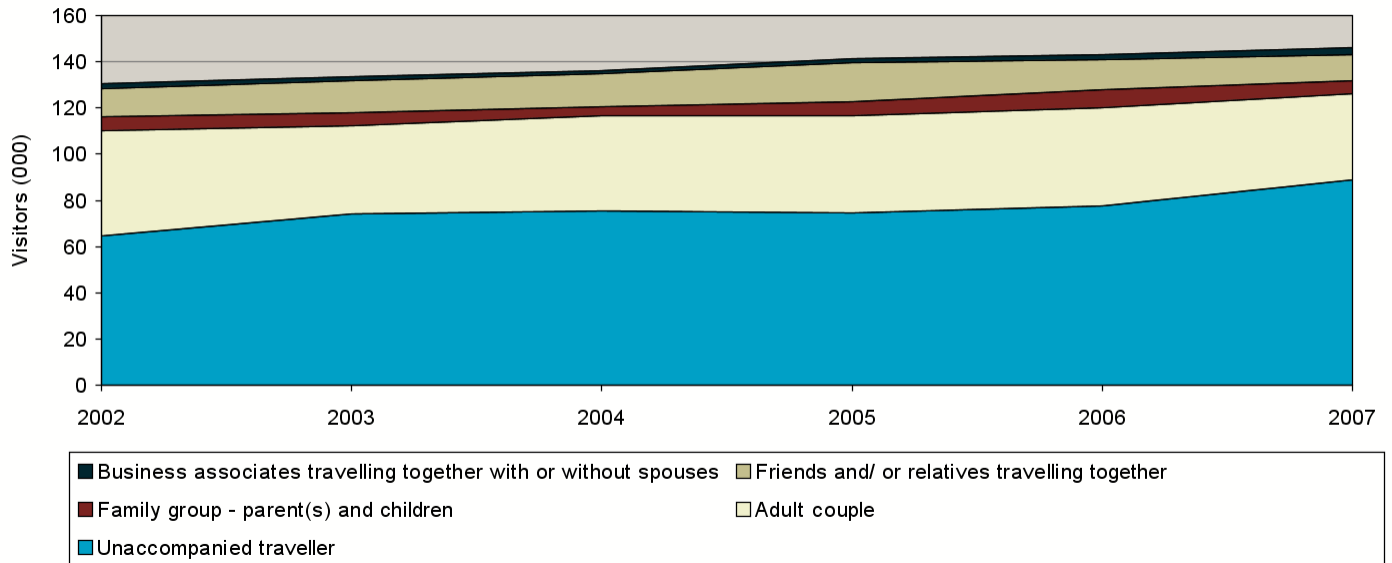
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Travel Party

- The majority of visitors from Germany travelled as an unaccompanied traveller or an adult couple (Figure 4 and Table 1).
- In 2007, the number of unaccompanied visitors from Germany was 88,790 or 61% of all visitors from Germany.

Figure 4 - Visitors from Germany by travel party description 2002 - 2007.



Source: Tourism Research Australia, International Visitor Survey
 Base : All International visitors aged 15 years and over

Table 1 - Visitors from Germany by travel party description 2002 - 2007.

Travel Party Description	2002		2003		2004		2005		2006		2007	
	'000	%	'000	%	'000	%	'000	%	'000	%	'000	%
Unaccompanied traveller	64.8	50	74.3	56	75.2	55	74.6	53	77.4	54	88.8	61
Adult couple	45.1	35	38.1	29	41.4	30	41.9	30	42.9	30	37.5	26
Family group - parent(s) and children	6.3	5	5.3	4	4.1	3	6.1	4	7.5	5	5.5	4
Friends and/or relatives travelling together	12.3	9	14.0	10	14.0	10	16.9	12	13.1	9	11.4	8
Business associates travelling together with or without spouses	2.1	2	1.9	1	1.5	1	2.1	1	2.3	2	3.0	2
Total	130.6	100	133.7	100	136.2	100	141.6	100	143.2	100	146.1	100

Base : All visitors aged 15 years or over. Number in grey subject to sampling variability too high for practical purposes.
 Source: Tourism Research Australia, International Visitor Survey.

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Visitor Demographics

Figure 5 - Visitors from Germany by age 1995 - 2007.

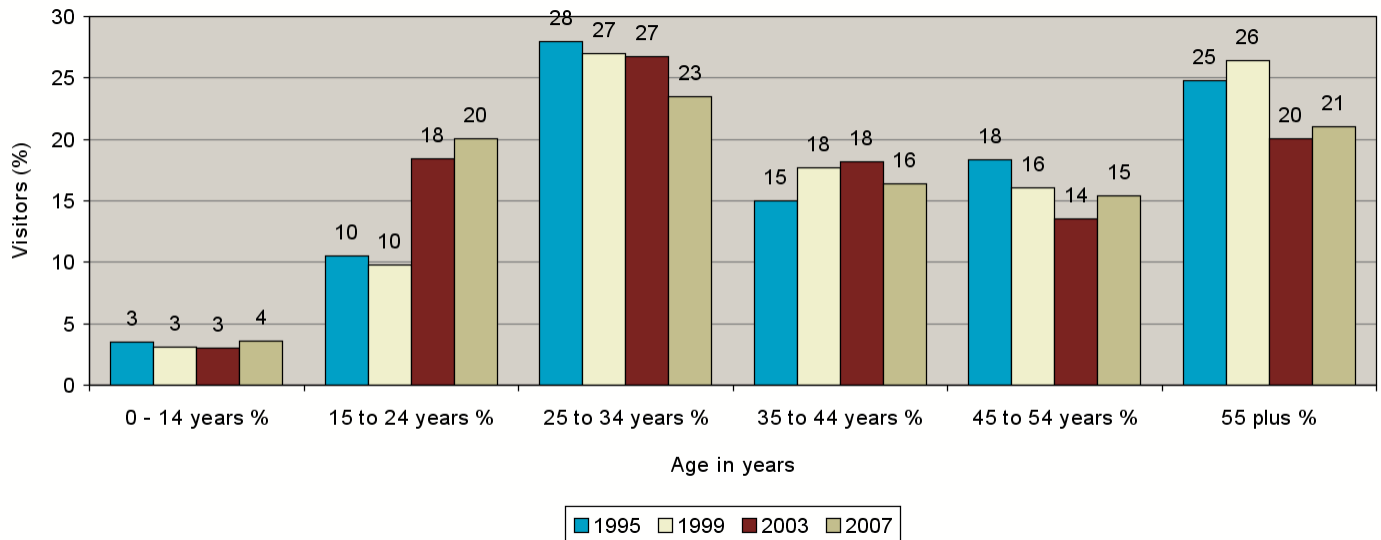
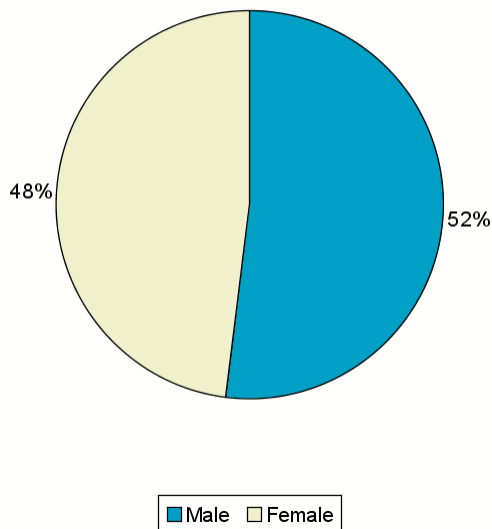


Figure 6 - Visitors from Germany by gender 2007



- In 2007 the age distribution shows 4% were aged 0-14 years, 20% were 15-24 years, 23% were 25-34 years, 16% were 35-44 years, 15% were aged 45-54 years and 21% were 55 and over.
- Of visitors from Germany 52% were males or 78,590 visitors and 48% were females or 72,993 visitors. The gender ratio of visitors from Germany is 108 males per 100 females.

Source: Department of Immigration and Citizenship.
Base : All International visitors.

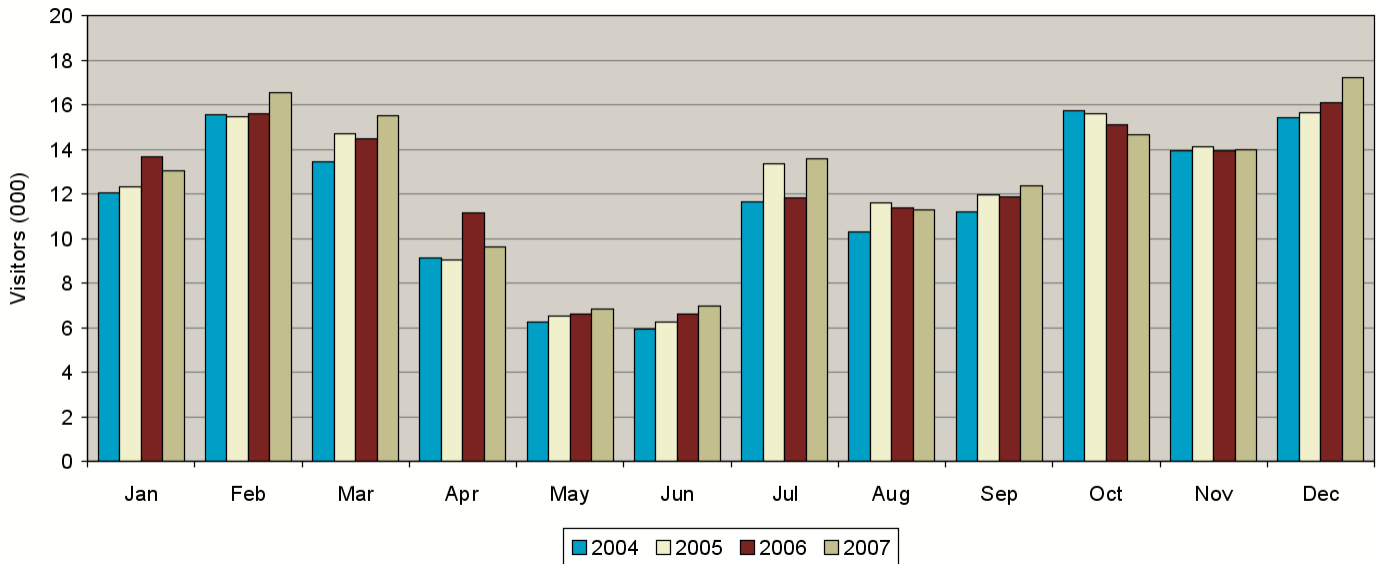
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Seasonality

- The seasonality of visitor arrivals from Germany is shown in Figure 7
- In 2007, December was the peak month for visitors from Germany, followed by February and March.

Figure 7 - Visitors from Germany by month of arrival 2004 - 2007.



Source: Australian Bureau of Statistics, Overseas Arrivals and Departures Data [Cat. 3401.0]
 Base : All international visitors

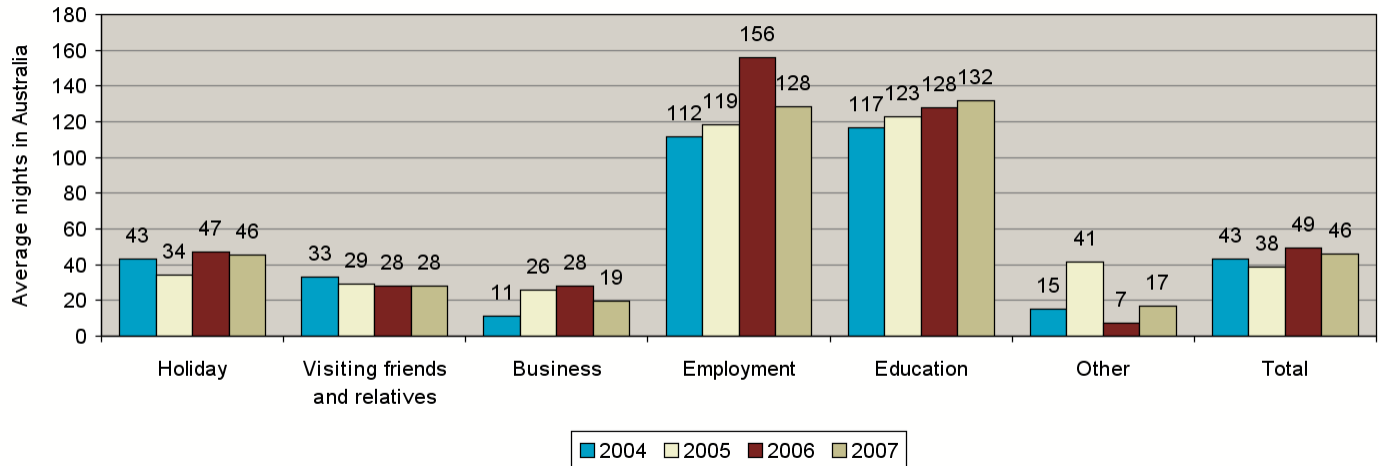
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Duration of Stay

- During 2007, visitors from Germany spent 6.8 million nights in Australia, representing 4% of all international visitor nights.

Figure 8 - Duration of stay for visitors from Germany by main purpose of visit 2004 - 2007.



Source: Tourism Research Australia, International Visitor Survey
 Base : All International visitors aged 15 years and over

Table 2 - Duration of stay for visitors from Germany by main purpose of journey

Nights in Australia	Average				Median (a)			
	2004	2005	2006	2007	2004	2005	2006	2007
Main purpose of journey								
Holiday	43	34	47	46	26	24	26	25
Visiting friends and relatives	33	29	28	28	22	21	24	21
Business	11	26	28	19	8	8	11	8
Employment	112	119	156	128	92	92	156	83
Education	117	123	128	132	85	114	134	131
Other	15	41	7	17	3	15	1	1
Total	43	38	49	46	24	23	25	23

Base: All visitors aged 15 years or over.

(a) Median nights represents the duration of stay for which 50 per cent of visitors stay less time and 50 per cent stay longer. The average number of nights is generally higher than the median because of the influence of a small number of visitors who stay for long periods.

Source: Tourism Research Australia, International Visitor Survey.

Note : Total Includes employment and other reasons.

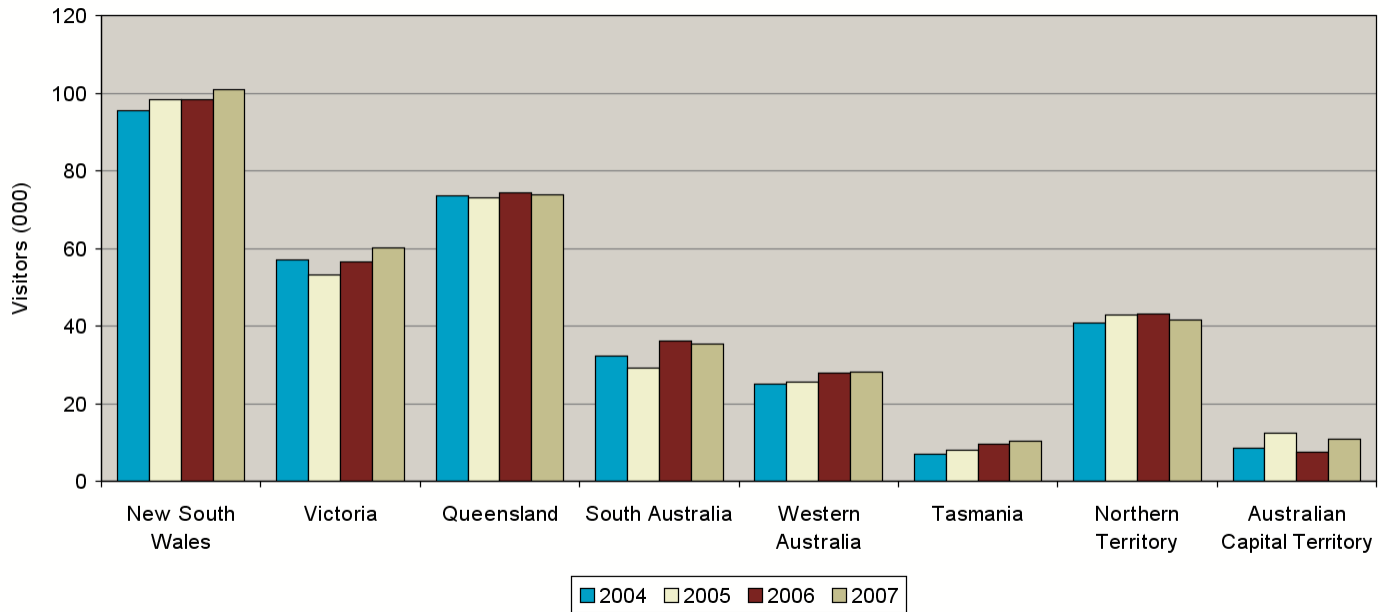
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Destination Visited

- In 2007, the most popular State or Territory for visitors from Germany was New South Wales with 100,851 or 69% of visitors, staying for 2 million nights.

Figure 9 - Visitors from Germany by State/Territory visited



Source: Tourism Research Australia, International Visitor Survey
Base : All International visitors aged 15 years and over

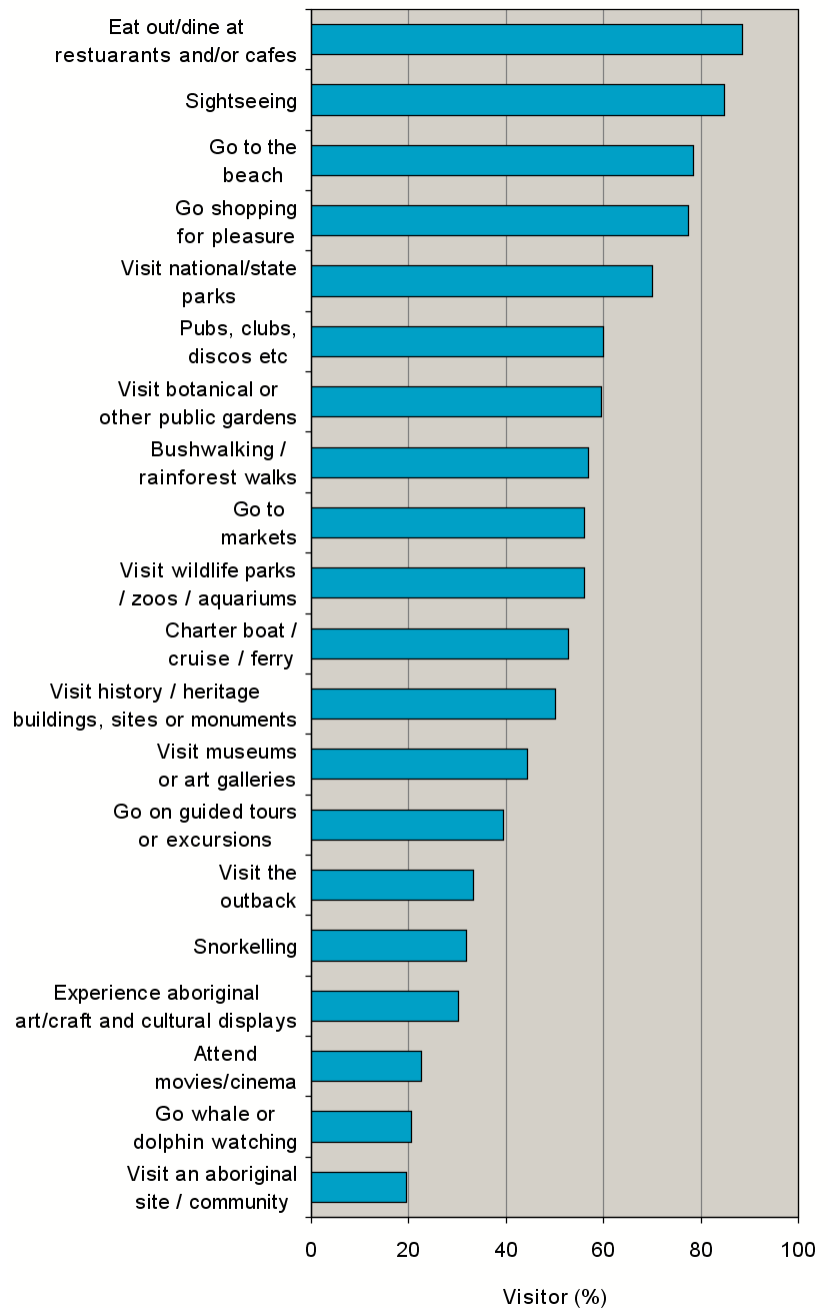
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Leisure Activities

- Figure 10 shows the most popular leisure activities undertaken by visitors from Germany whilst in Australia.
- The top five activities in 2007 were: eat out at restaurants and or cafes, sightseeing, go to the beach (including swimming, surfing and diving), go shopping for pleasure and visit National or State parks.

Figure 10 - Visitors from Germany by leisure activities 2007



Source: Tourism Research Australia, International Visitor Survey
Base : All International visitors aged 15 years and over

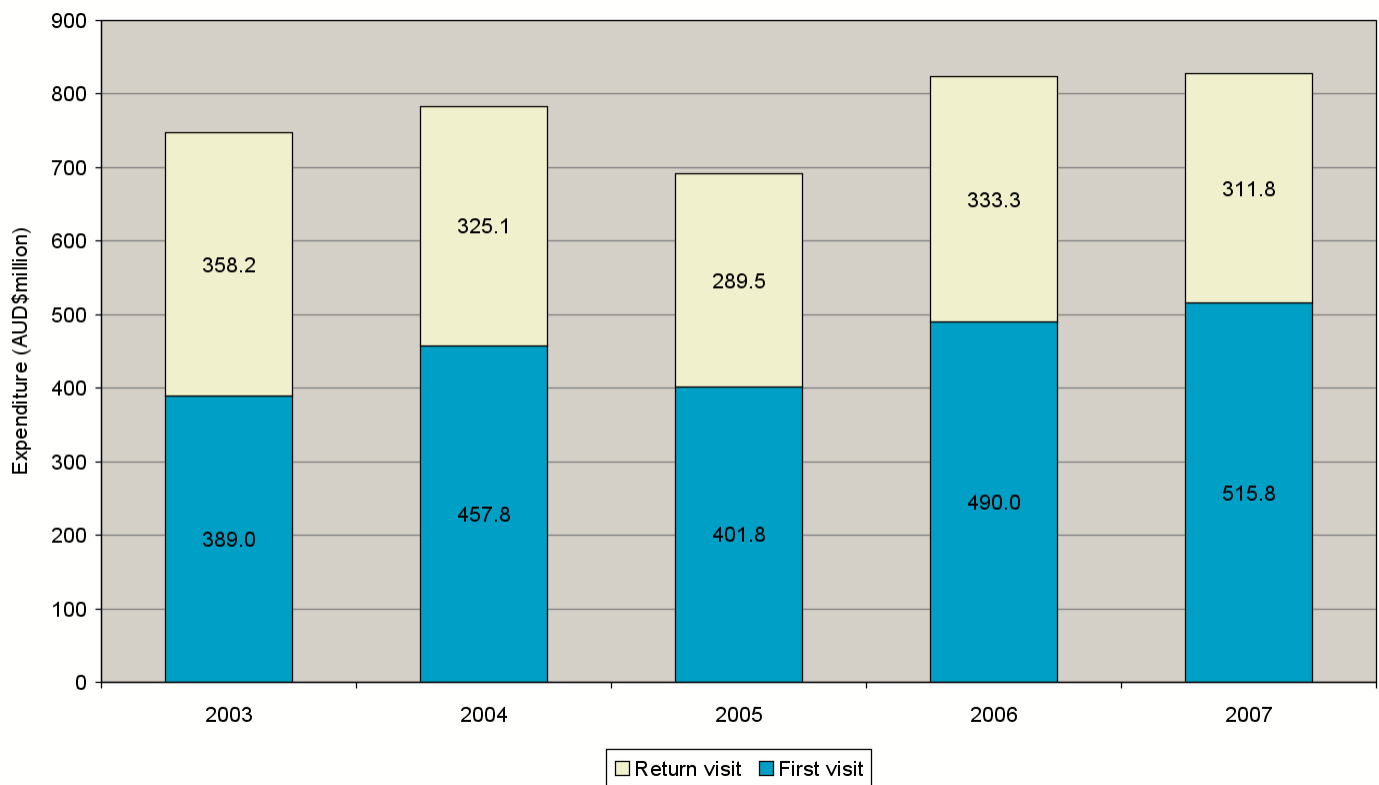
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Expenditure

- Travellers from Germany accounted for 4% of all TIEV.
- A total of \$516 million or 62% of TIEV came from visitors from Germany on their first trip to Australia, while return visitors spent \$312 million.
- In 2007, the average Total Inbound Economic Value (TIEV) for German visitors was \$5,663.

Figure 11 - Visitors from Germany : Total Inbound Economic Value (TIEV) by First vs Return Visit 2007.



Source: Tourism Research Australia, International Visitor Survey

Base : All International visitors aged 15 years and over

Note : TIEV is calculated by the Tourism Forecasting Committee using total trip spend by inbound tourists to Australia as collected in Tourism Research Australia's International Visitor Survey and then benchmarking these results to the ABS Tourism Satellite Account (Cat. No.5249.0). All amounts are reported in Australian Dollars.

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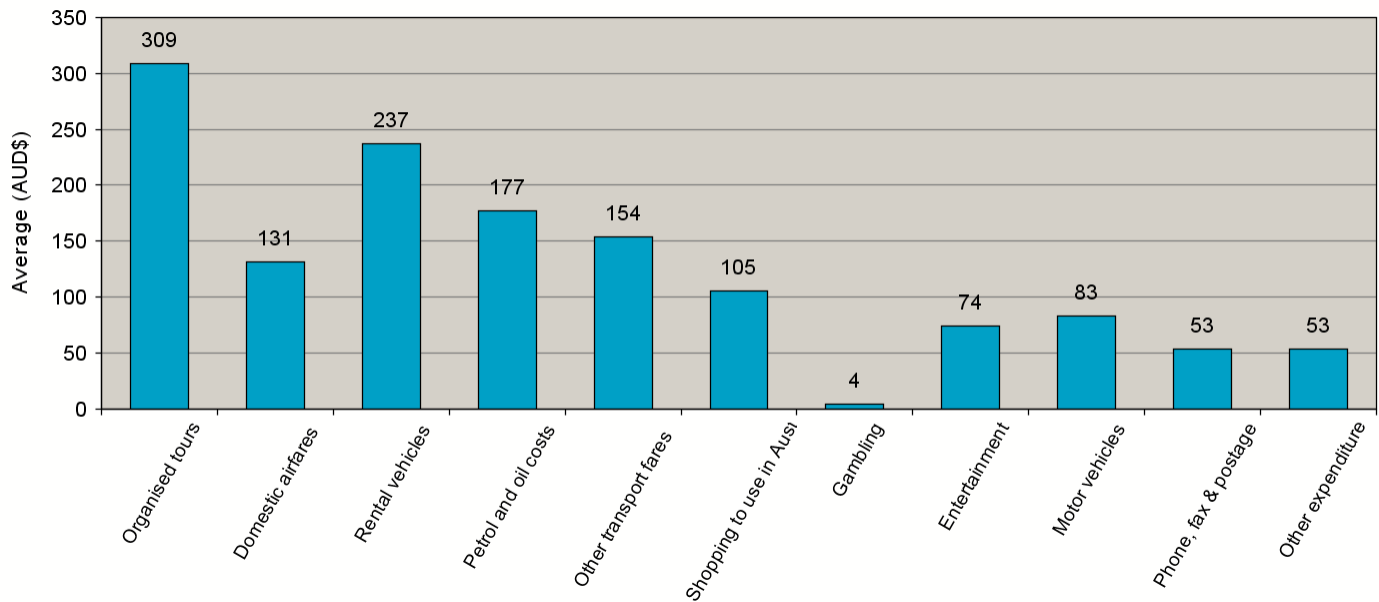
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Expenditure

Figure 12 shows expenditure by item as an average for all international visitors from Germany. The table shows main items of expenditure which should be compared to the small items of expenditure which are charted.

Expenditure Item	Average A\$
International airfares	1,773
Food, drink & accommodation	1,778
Shopping to take home	171
Education	293
Package tour	1,051
Other (total of items charted)	1,380

Figure 12 - Average expenditure for visitors from Germany by expenditure item 2007.



Source: Tourism Research Australia, International Visitor Survey
 Base : All International visitors aged 15 years and over
 Note : All amounts are reported in Australian Dollars.

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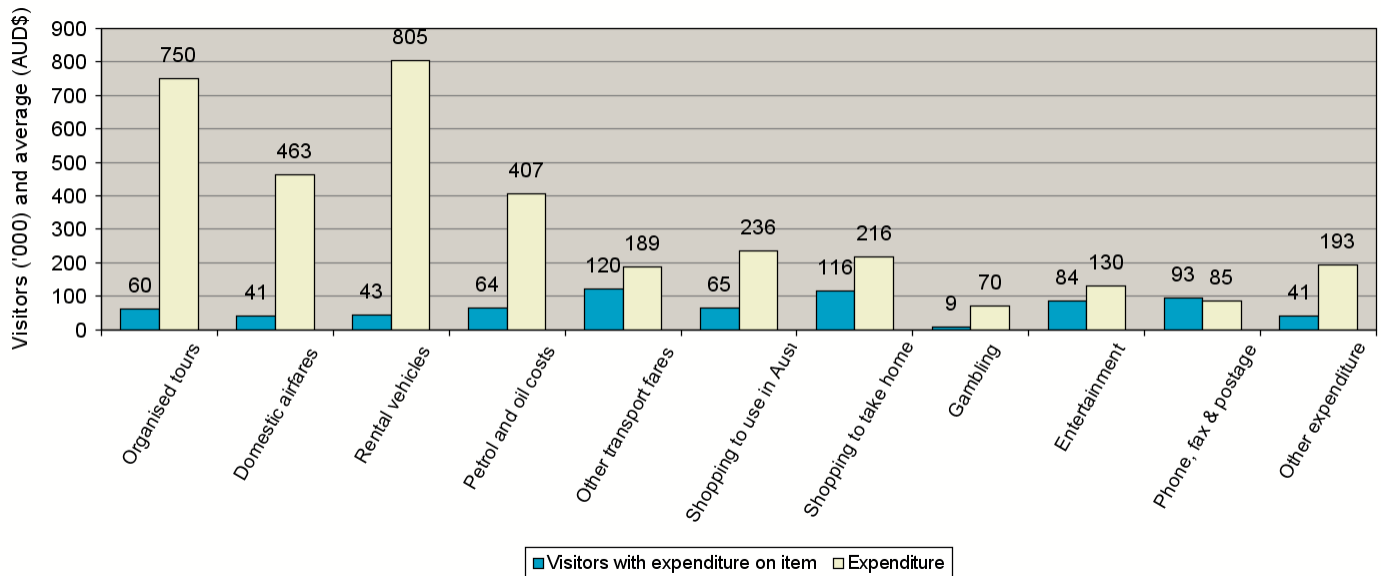
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Expenditure

- Figure 13 expresses average expenditure only for visitors who spent money on that item during their stay in Australia. For example, education fees were one of the largest spending items by this measure; however only 5% of all visitors from Germany had expenditure on this item.
- In 2007, 79% of German travellers purchased 'shopping to take home' and 41% purchased 'organised tours'.

Expenditure Item	Visitors ('000)	Average A\$
International airfares	117	2,209
Food, drink & accommodation	141	1,844
Motor vehicles	4	2,762
Package tour	29	5,237
Education	8	5,362

Figure 13 - Average expenditure for visitors from Germany with expenditure on item 2007.



Source: Tourism Research Australia, International Visitor Survey
 Base : All International visitors aged 15 years and over
 Note : All amounts are reported in Australian Dollars

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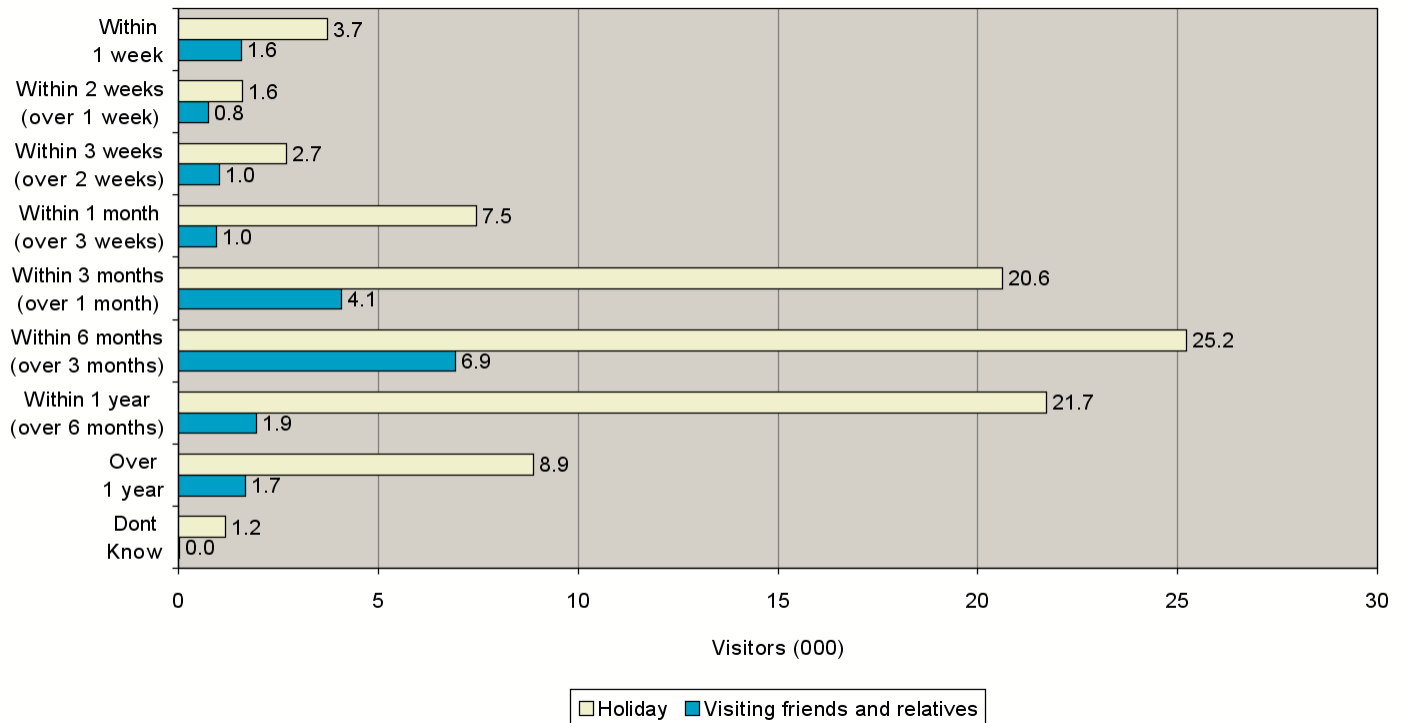
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Planning and Booking Horizons

- Of the leisure travellers from Germany (68%) prepare their trip within 6 months of arriving in Australia.
- In 2007, 66% of holiday visitors started planning within six months prior to arriving in Australia, while 33% began planning more than six months before arrival.
- In 2007 81% of VFR travellers had started planning within six months of arriving in Australia, 44% within 3 months. A further 19% planned over six months ahead.

Figure 14 - Leisure visitors from Germany: Planning horizon by main purpose of journey 2007.

"How long before you arrived in Australia did you start planning this trip?"



Source: Tourism Research Australia, International Visitor Survey
Base : All International visitors aged 15 years and over

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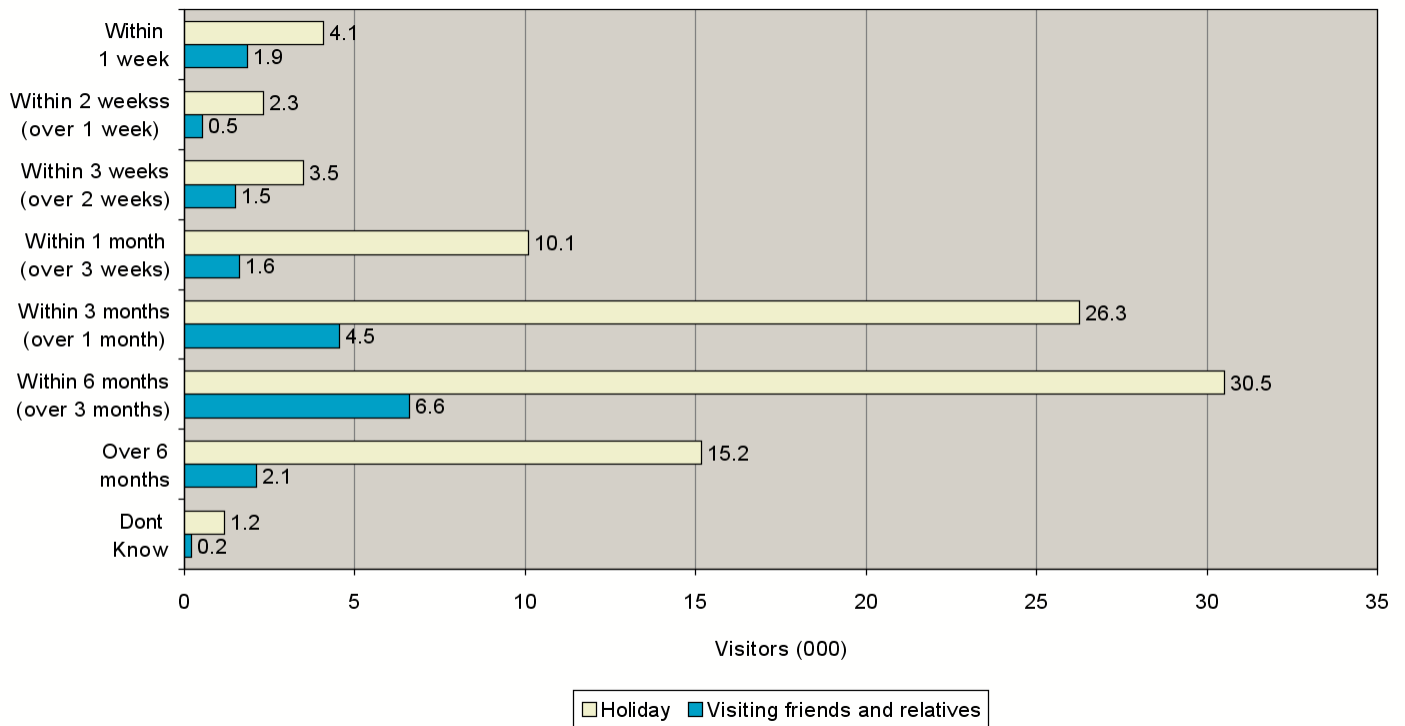
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Planning and Booking Horizons

- When booking flights 21% of holiday travellers booked their ticket within one month of arrival, while 29% of VFR travellers booked flights within one month.
- Of the leisure travellers 15% booked their flight more than 6 months in advance while 23% booked within 1 month.

Figure 15 - Leisure visitors from Germany: Booking horizon by main purpose of journey 2007.

"How long before you arrived in Australia did you book your airfare?"



Source: Tourism Research Australia, International Visitor Survey
Base : All International visitors aged 15 years and over

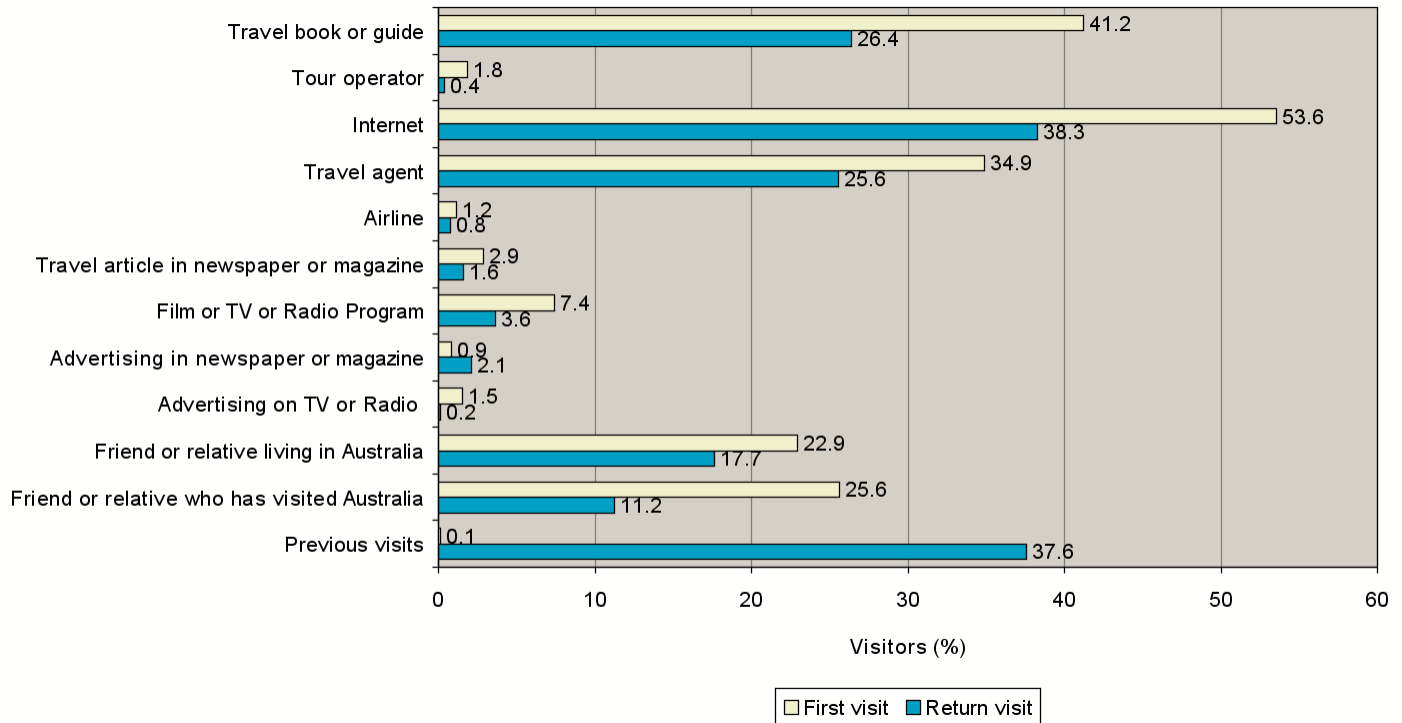
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Information Sources

- The most commonly used source of information for first time travellers from Germany (54%) was the internet when planning their travel.
- When planning this trip to Australia 38% of return visitors sourced information from either the internet or a previous visit.

Figure 16 - Visitors from Germany: Information sources on Australia by first or return visit 2007.



Source: Tourism Research Australia, International Visitor Survey
 Base : All International visitors aged 15 years and over

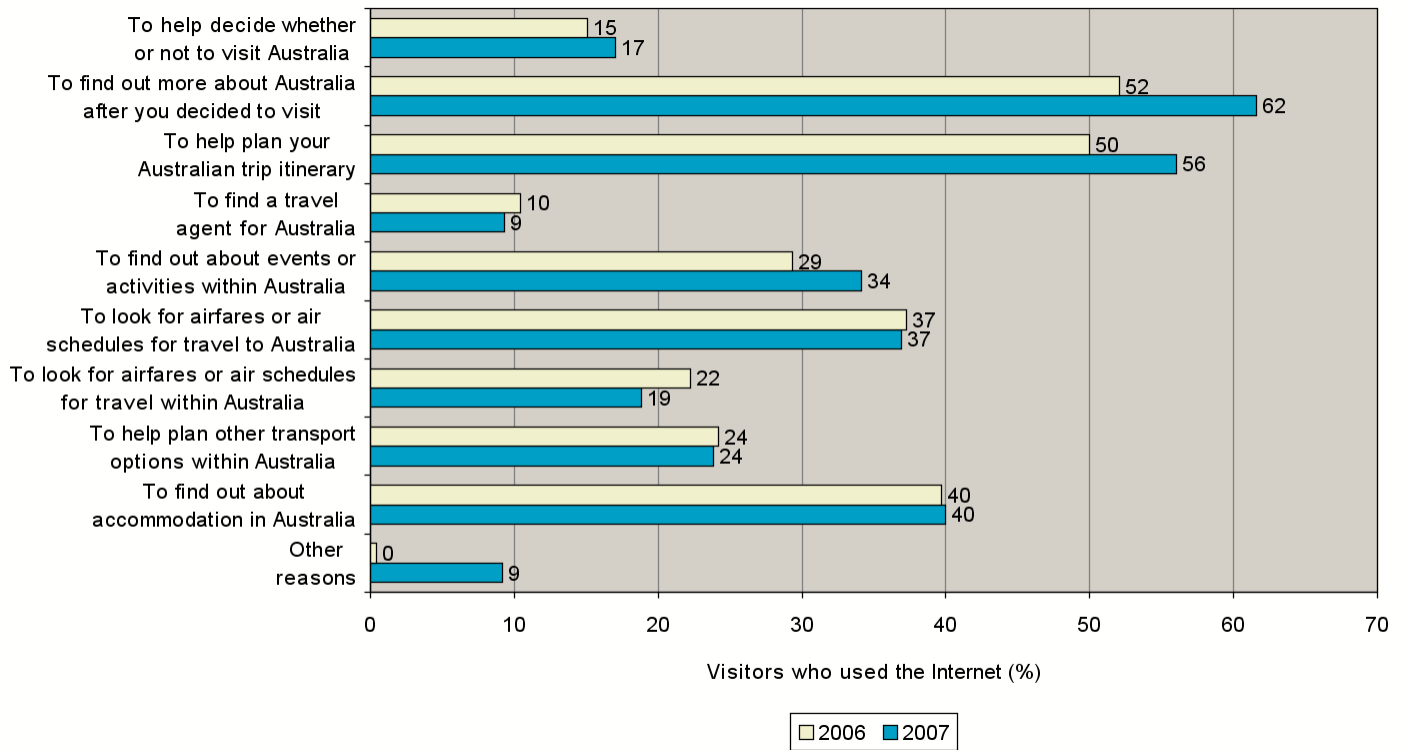
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Internet Usage

- In 2007, a total of 98,431 or 67% of visitors from Germany used the internet when planning their trip to Australia
- Most visitors from Germany (62%) used the internet to find out more about Australia after they decided to visit.

Figure 17 - Visitors from Germany by reasons for using the Internet 2006-2007.



Source: Tourism Research Australia, International Visitor Survey
 Base : All International visitors aged 15 years and over

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