



International Visitor Profile 2009

Germany

Summary

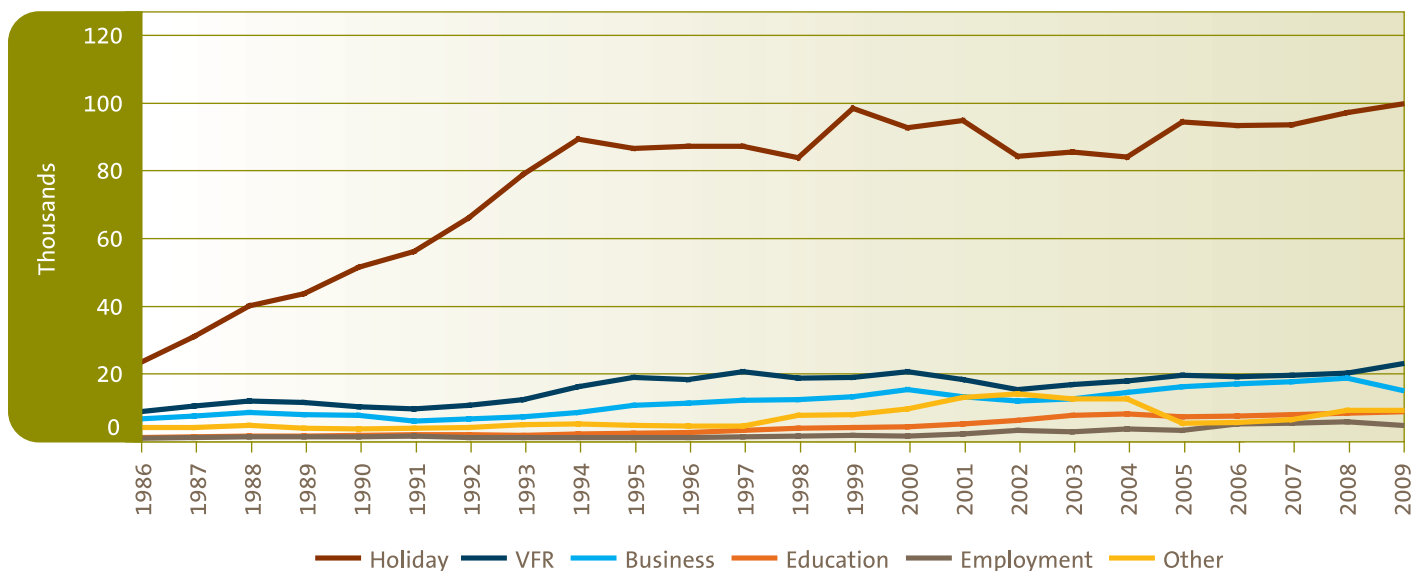
- Germany is Australia's ninth largest inbound market. In 2009, there were 156,034 visitors from Germany over 15 years of age and 161,334 visitors in total.
- The average length of stay for visitors from Germany was 46 nights compared to the national average of 34 nights.
- Visitors from Germany accounted for 4% of all international visitor nights in 2009, making Germany the seventh largest market in terms of nights.
- Visitors from Germany spent \$1.1 billion on trips to Australia in 2009, spending on average \$6,737 per trip.

For the latest forecasts for this market released by the Tourism Forecasting Committee, go to www.ret.gov.au/tra

Visitor arrivals

- Visitor arrivals from Germany remained fairly flat (up 1%) in 2009 compared to 2008.
- There were increases in the holiday, visiting friends and relatives (VFR) and education markets (3%, 14% and 5% respectively) and decreases in the business and employment markets (-19% and -23% respectively).

Figure 1 – Main purpose of visit



Australian Government

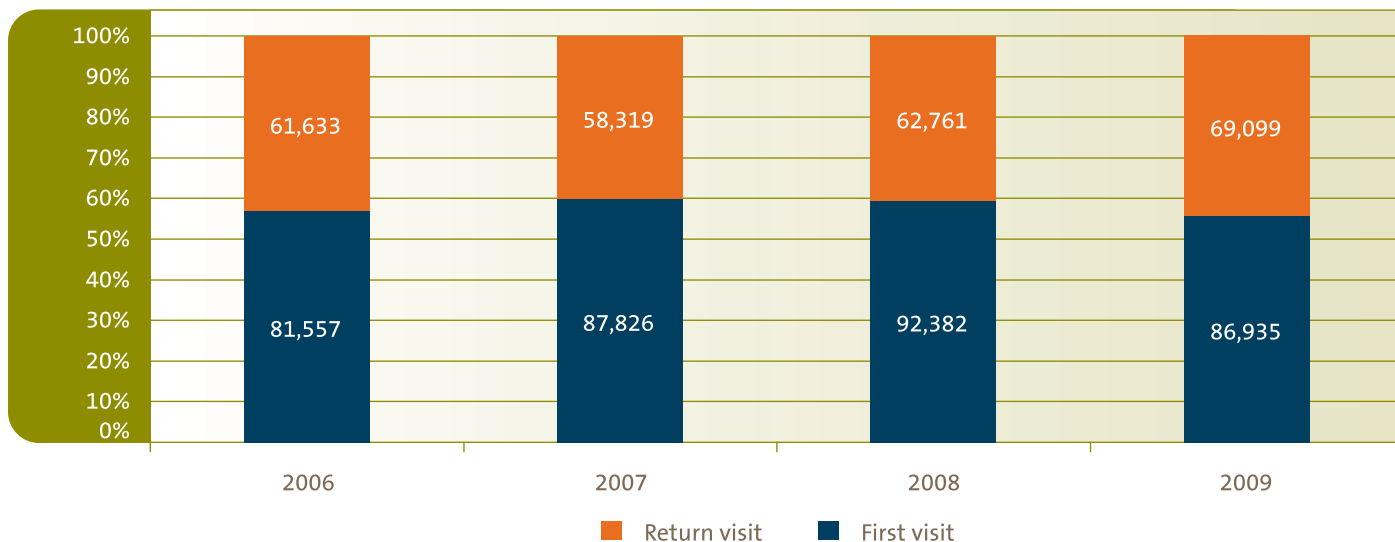
Department of Resources, Energy and Tourism

Tourism Research Australia

Repeat visitors

- Around 56% of visitors from Germany were first-time visitors to Australia in 2009. This is compared to the national average of 38% first-time visitors.

Figure 2 – First of return visit



Travel party

- Visitors from Germany travelled unaccompanied (62%) and as an adult couple (24%).

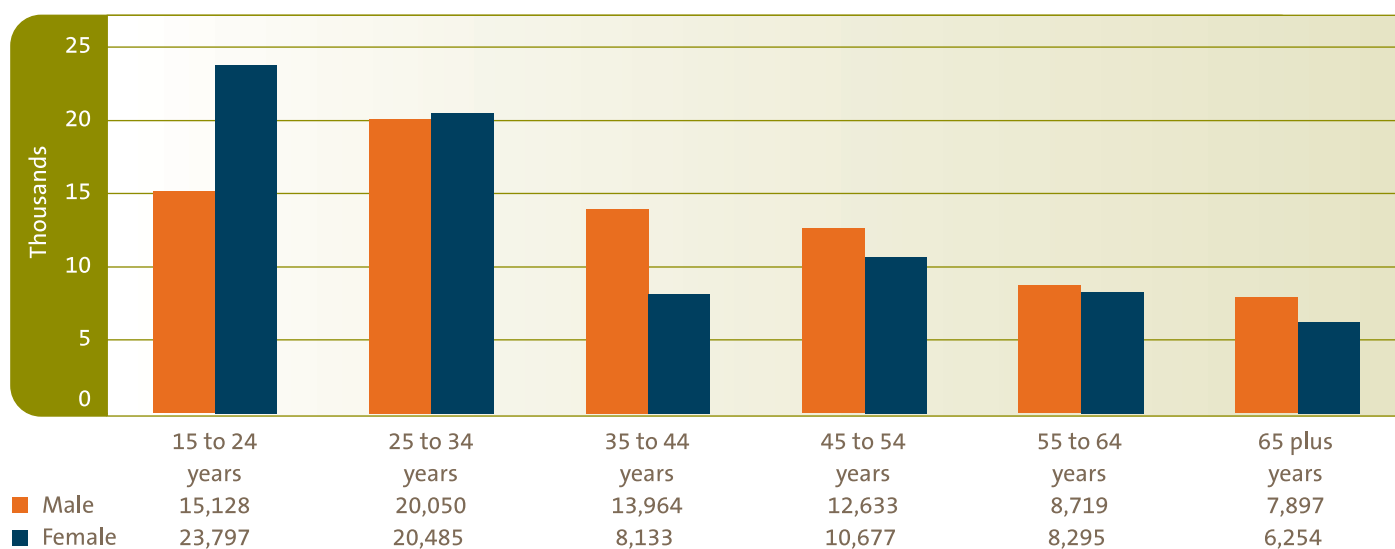
Table 1 – Travel party

| | 2006 | | 2007 | | 2008 | | 2009 | |
|--------------------------------------|------|-----|------|-----|------|-----|------|-----|
| | '000 | % | '000 | % | '000 | % | '000 | % |
| Unaccompanied traveller | 77 | 54 | 89 | 61 | 91 | 59 | 97 | 62 |
| Adult couple | 43 | 30 | 37 | 26 | 37 | 24 | 38 | 24 |
| Family group –parent(s) and children | 8 | 5 | 6 | 4 | 7 | 5 | 6 | 4 |
| Friends or relatives | 13 | 9 | 11 | 8 | 19 | 12 | 13 | 8 |
| Business associates | 2 | 2 | 3 | 2 | 2 | 1 | 2 | 1 |
| Total | 143 | 100 | 146 | 100 | 155 | 100 | 156 | 100 |

Demographics

- The largest demographic of visitors from Germany were persons aged 25 to 34 years (26% of visitors) and 15 to 24 years (25% of visitors).

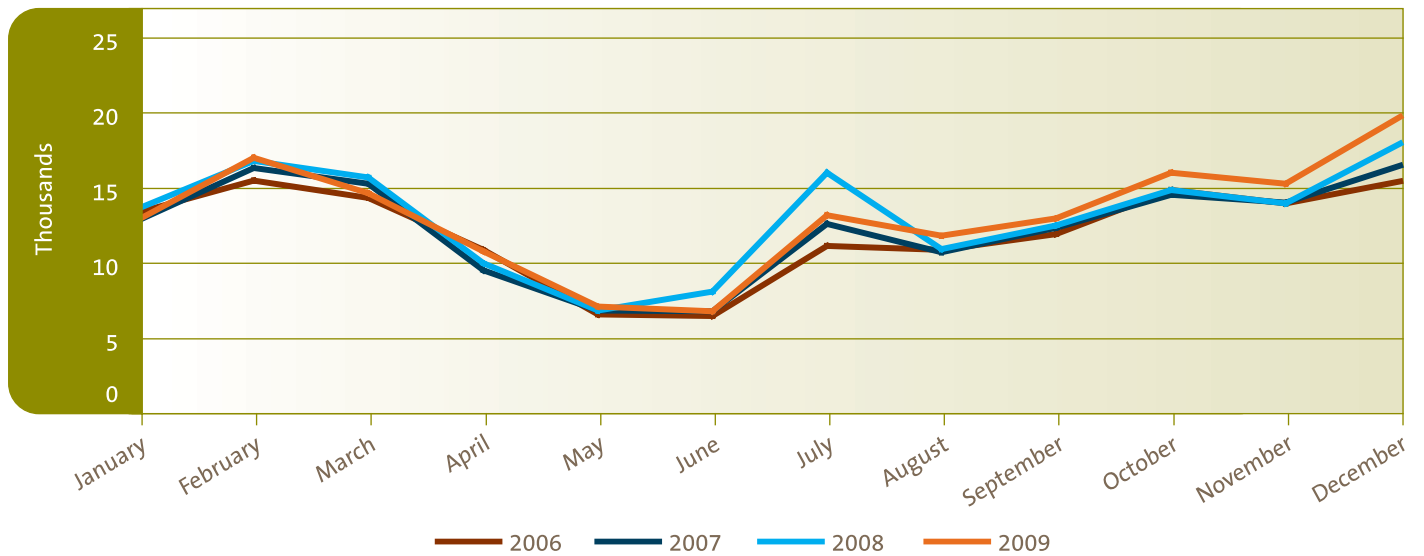
Figure 3 – Age and gender, 2009



Seasonality

- Traditionally, visitor arrivals from Germany are lowest during May and June.

Figure 4 – Month of arrival



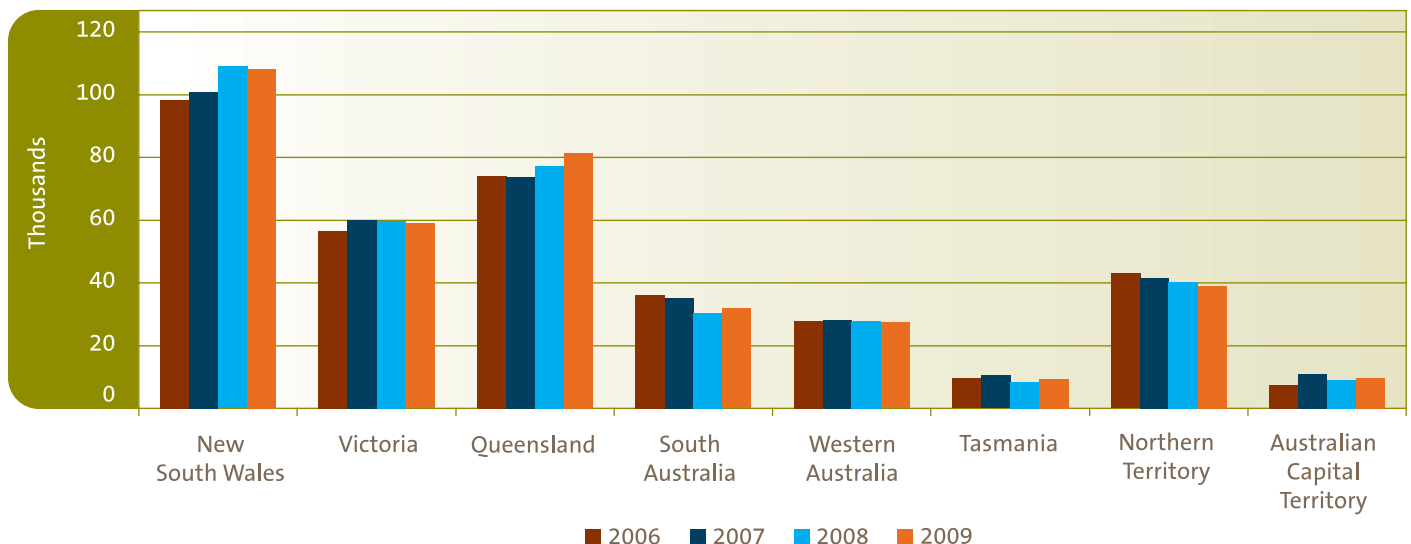
Length of stay and destination

- Visitors travelling for education (108 nights) and employment (103 nights) had the longest average length of stay of all visitors from Germany.
- The most visited states/territories by German visitors were New South Wales, Queensland, Victoria and Northern Territory.

Table 2 – Duration of stay by main purpose of visit

| | 2006 | | 2007 | | 2008 | | 2009 | |
|-------------------------------|------|--------|------|--------|------|--------|------|--------|
| | Mean | Median | Mean | Median | Mean | Median | Mean | Median |
| Holiday | 47 | 26 | 46 | 25 | 44 | 24 | 48 | 24 |
| Visiting friends or relatives | 28 | 24 | 28 | 21 | 28 | 20 | 21 | 17 |
| Business | 28 | 11 | 19 | 8 | 14 | 9 | 17 | 7 |
| Education | 128 | 134 | 132 | 131 | 137 | 138 | 108 | 93 |
| Employment | 156 | 156 | 128 | 83 | 160 | 145 | 103 | 67 |
| Other | 7 | 1 | 17 | 1 | 11 | 5 | 45 | 8 |
| Total | 49 | 25 | 46 | 23 | 46 | 23 | 46 | 22 |

Figure 5 – State/territory visited



Dispersal

- Visitors from Germany spent 52% of their nights outside the major gateways of Sydney, Melbourne, Brisbane and Perth, compared to the national average of 32% of nights.

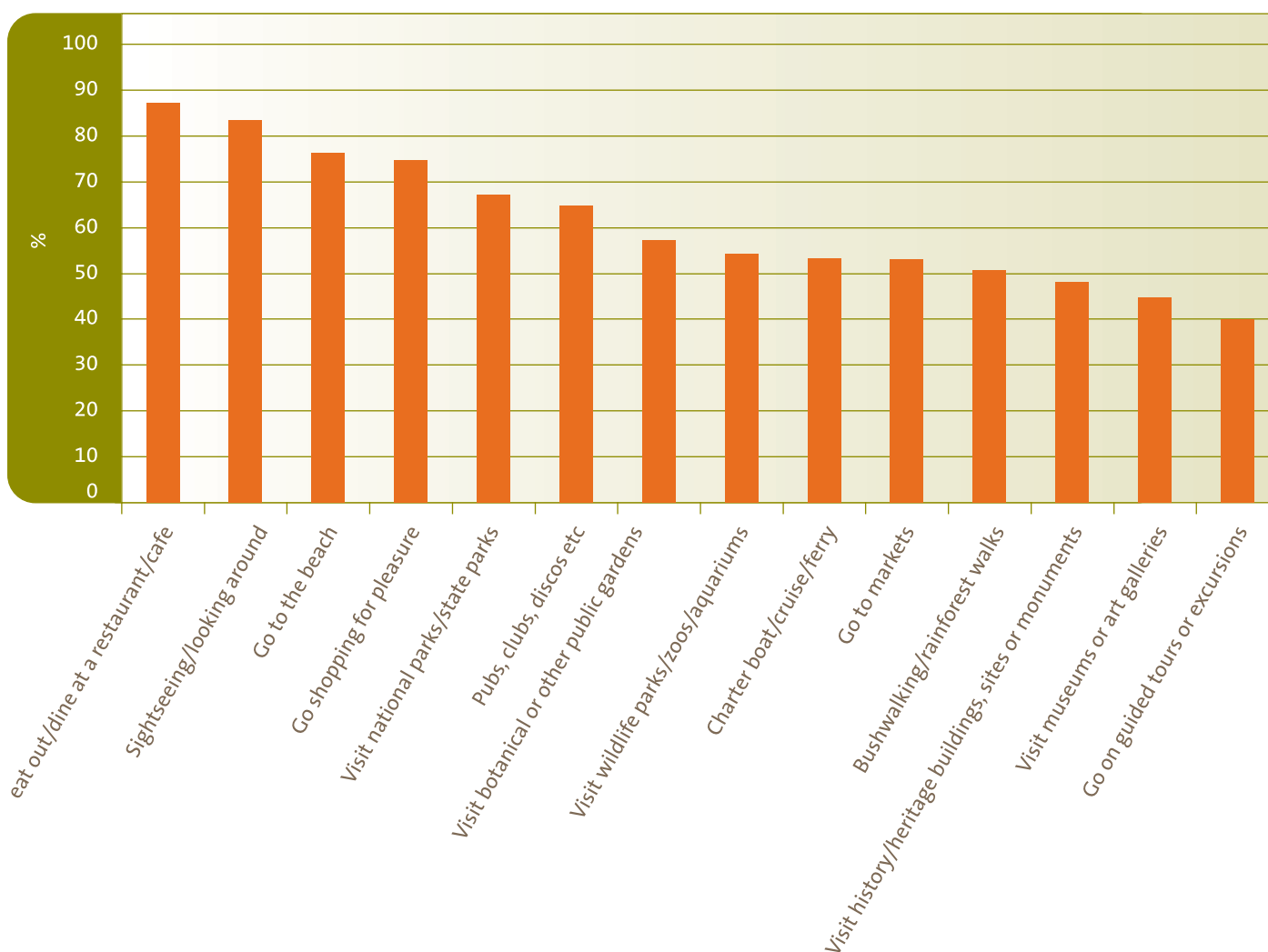
Table 3 – Dispersal by visitor nights

| | 2006 | | 2007 | | 2008 | | 2009 | |
|-------------------|-----------------------|-----|-----------------------|-----|-----------------------|-----|-----------------------|-----|
| | Visitor nights ('000) | % | Visitor nights ('000) | % | Visitor nights ('000) | % | Visitor nights ('000) | % |
| Major gateways | 3,292 | 47 | 3,353 | 50 | 3,823 | 54 | 3,403 | 48 |
| Dispersed regions | 3,682 | 53 | 3,356 | 50 | 3,289 | 46 | 3,714 | 52 |
| Total | 6,974 | 100 | 6,709 | 100 | 7,112 | 100 | 7,118 | 100 |

Activities

- The most popular activities for visitors from Germany were: eat out/dine at a restaurant/café; sightseeing/looking around; go to the beach; and go shopping for pleasure.

Figure 6 – Leisure activities, 2009



TIEV¹ and expenditure

- Visitors from Germany had a Total Inbound Economic Value (TIEV) of \$882 million on trips to Australia in 2009. This was a 5% decrease on 2008.
- Visitors from Germany spent on average \$6,737 per trip.

Figure 7 – Total Inbound Economic Value (TIEV) by first and repeat visit

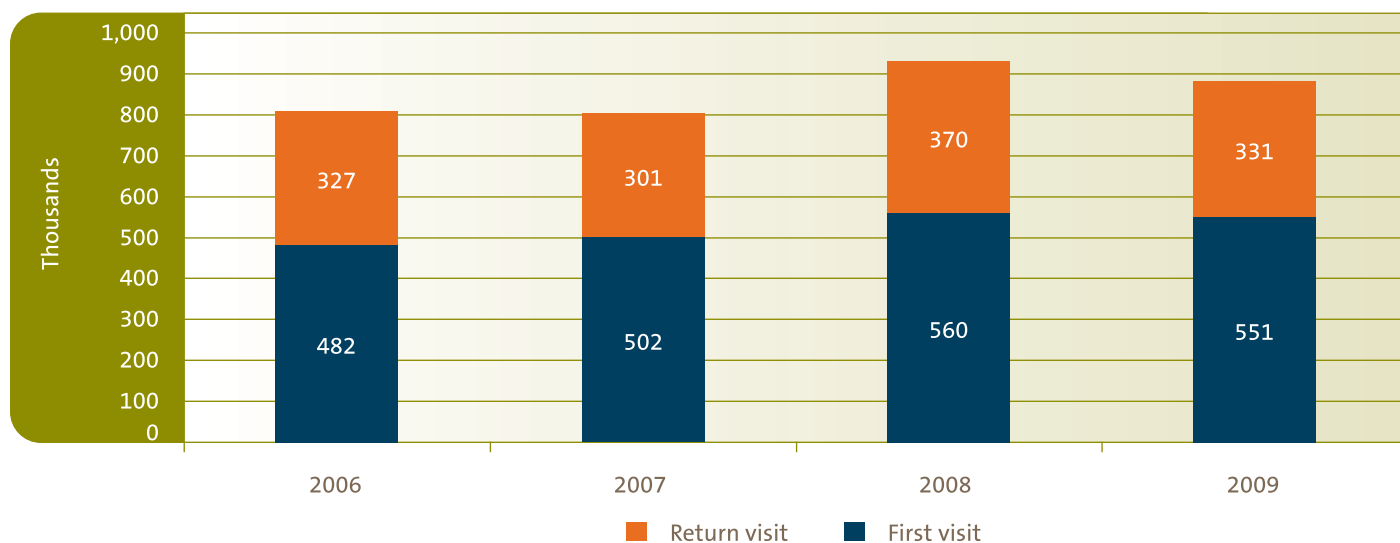


Table 4 – Visitors and average expenditure on specified items, 2009

| | Visitors ('000) | Average spend (\$) |
|-------------------------------|-----------------|--------------------|
| Organised tours | 64 | 761 |
| Domestic airfares | 51 | 417 |
| International airfares | 135 | 2,519 |
| Rental vehicles | 43 | 908 |
| Petrol and oil costs | 60 | 352 |
| Other transport fares | 128 | 190 |
| Food, drink and accommodation | 153 | 1,815 |
| Shopping to use in Australia | 72 | 251 |
| Shopping to take home | 118 | 247 |
| Gambling | 8 | 94 |
| Entertainment | 97 | 164 |
| Motor vehicles | 6 | 3,377 |
| Education | 9 | 4,384 |
| Phone, fax and postage | 105 | 96 |
| Package tour | 21 | 6,623 |
| Other | 51 | 152 |
| Total | 156 | 6,737 |

¹ TIEV represents the total amount of money that flows to the Australian tourism industry through the exportation of the tourism product.

Trip planning and booking horizons

- Holiday and VFR visitors from Germany planned their trip one to three months (24% and 28% respectively) and three to six months (26% and 35% respectively) prior to travel.
- More VFR visitors booked their flights within three weeks of travel than holiday visitors (24% compared to 13%).

Figure 8 – Planning horizons by purpose, 2009

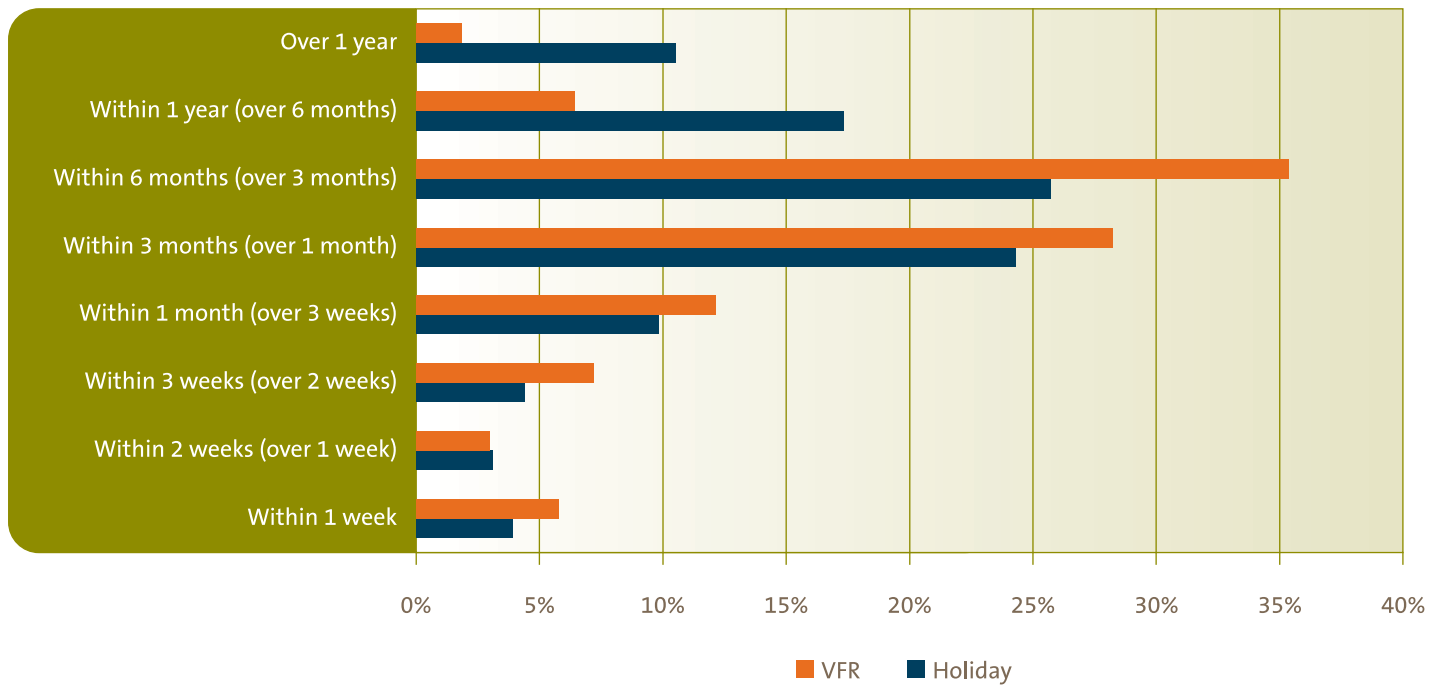
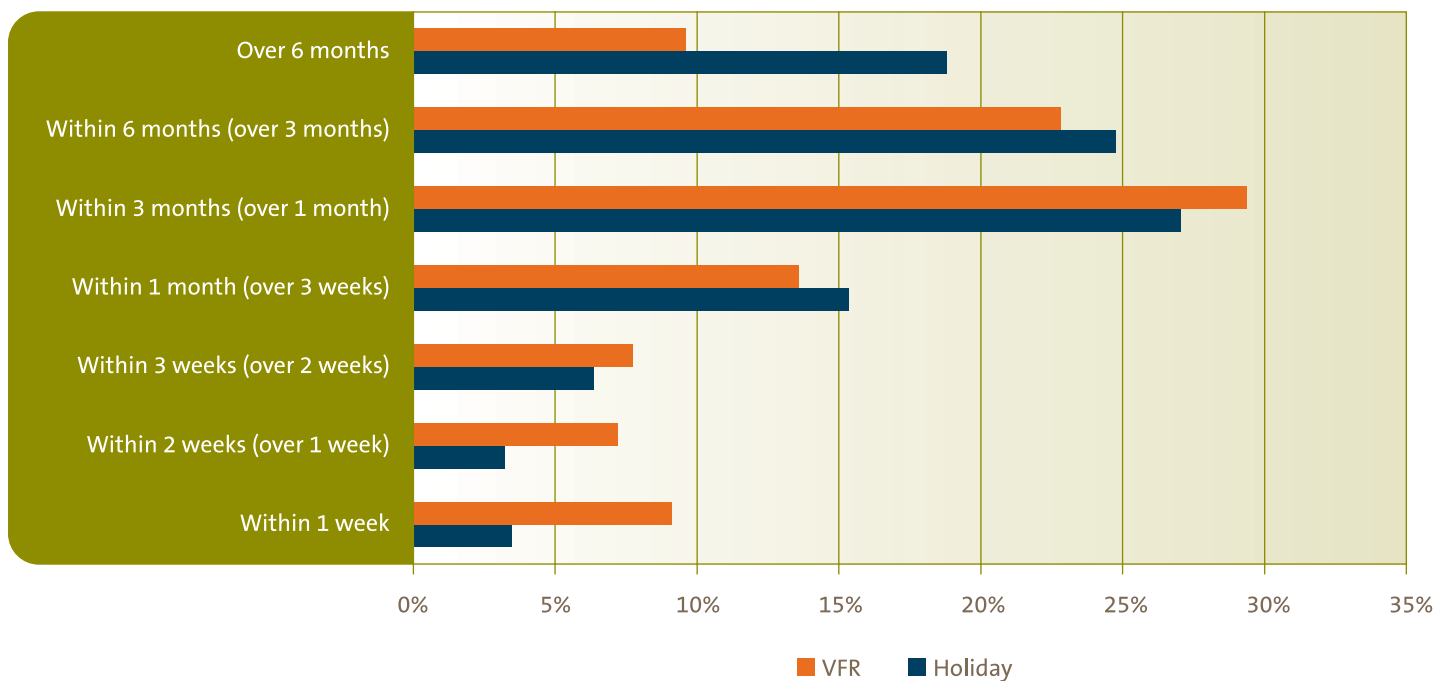


Figure 9 – Flight booking horizons by purpose, 2009



Information sources and internet usage

- The most common information sources for first-time visitors to Australia were the internet (62%), travel book or guide (42%) and travel agent (33%).
- The most common information sources for repeat visitors were the internet (45%), previous visit (36%) and travel agent (27%).
- The most common reasons for using the internet were to find out more about Australia after deciding to visit (56%), to help plan an itinerary (55%), to find out about accommodation in Australia (49%) and to look for airfares or air schedules to Australia (48%).

Figure 10 – Information sources, 2009

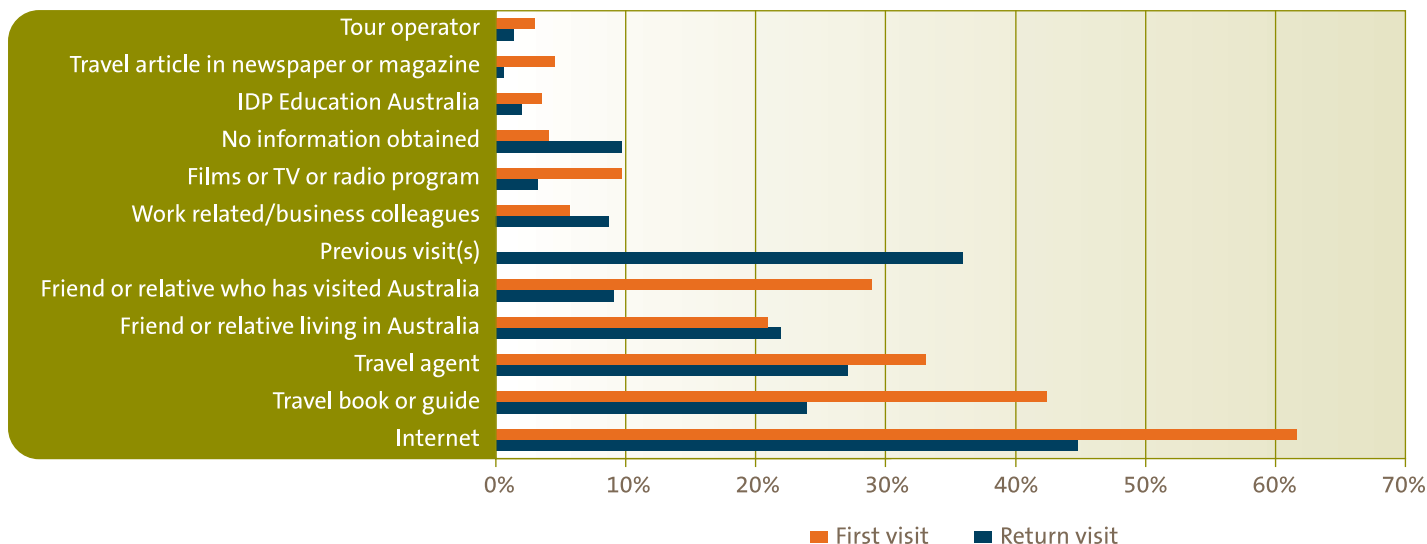
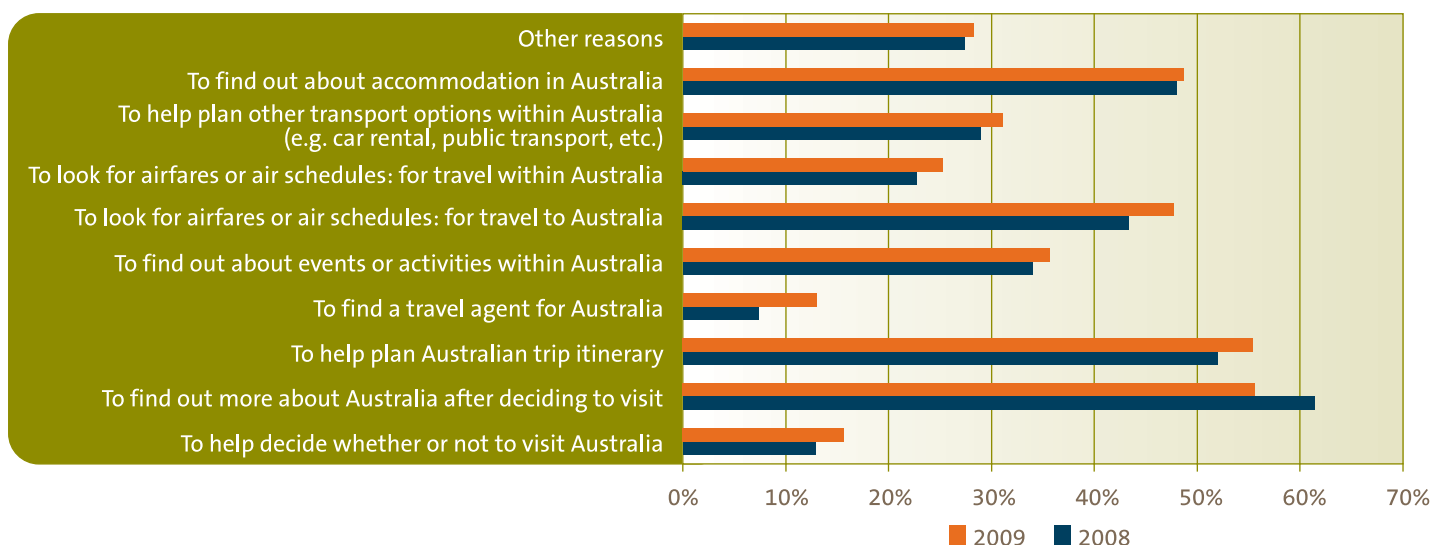


Figure 11 – Reasons for internet usage



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Data sources

Tourism Research Australia, International Visitor Survey (unpublished data)
 Figures 1, 3 and 4 – Department of Immigration and Citizenship
 All figures refer to persons over the age of 15 years

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