

GERMANY

These packs provide a brief snapshot of our core visitor markets prior to the interruption of international travel due to Covid-19.

Kea Point Track, Aoraki/Mount Cook



**100% PURE
NEW ZEALAND**

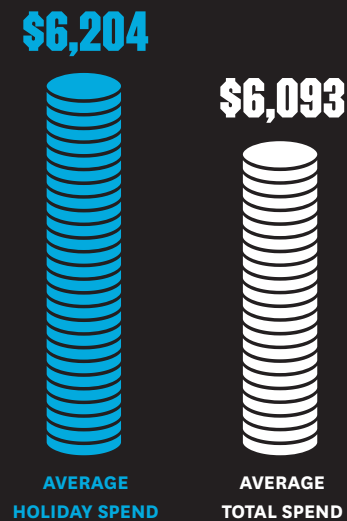
GERMANY

VISITOR SNAPSHOT

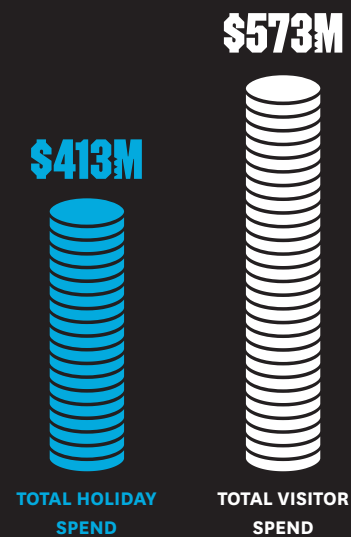


Germany was New Zealand's 6th largest market by arrivals, comprising 2.5% of total arrivals. They have a high average spend. 51% of their spend is in the regions compared to 31% for all markets.

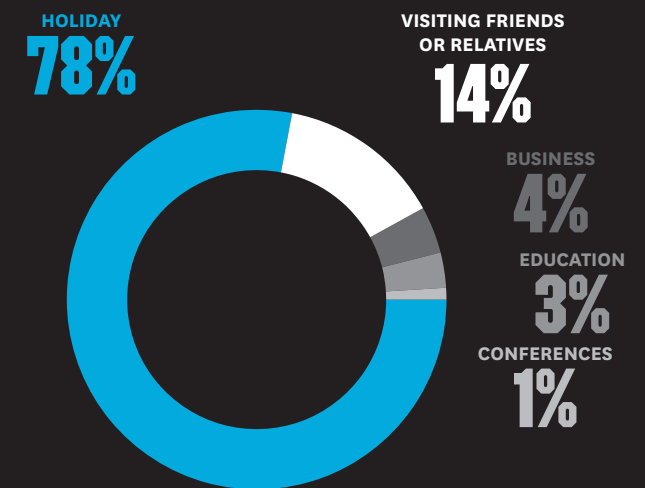
AVERAGE SPEND PER VISITOR



TOTAL MARKET CONTRIBUTION SPEND



PURPOSE OF VISIT



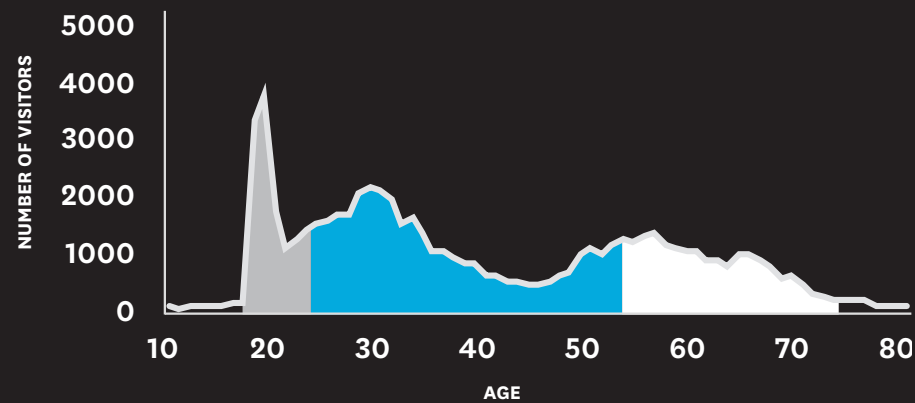
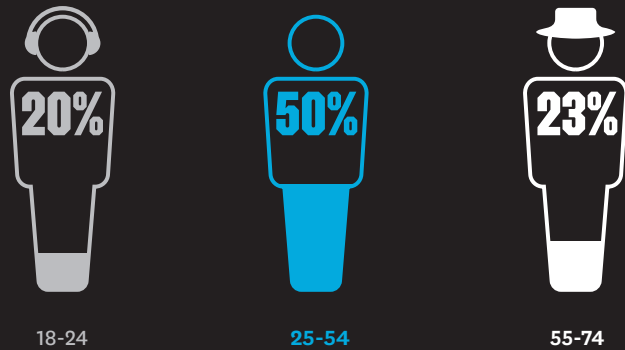


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VISITOR SNAPSHOT

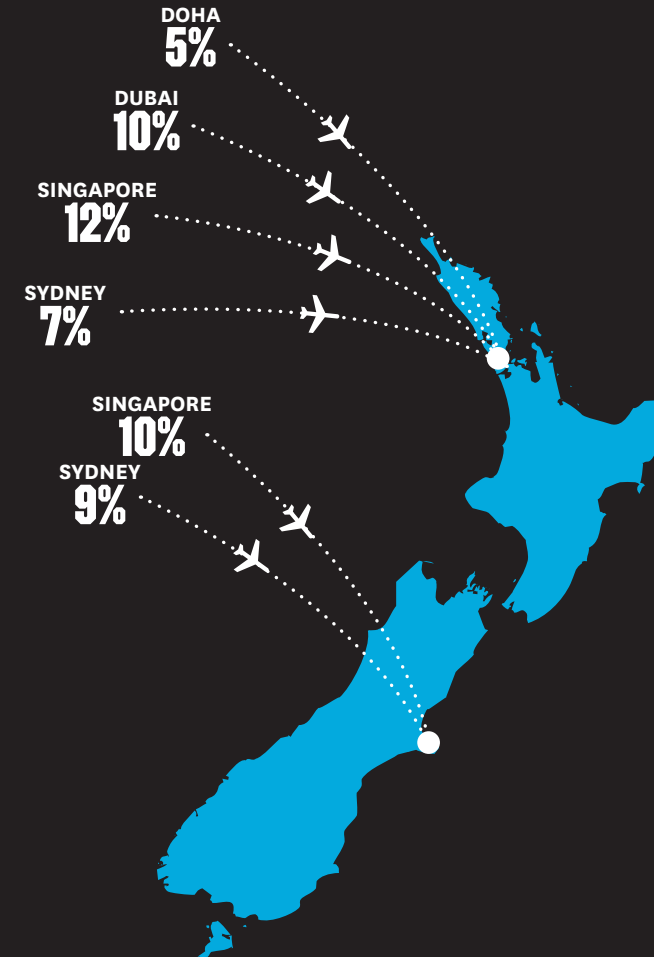
Germany over-indexes on younger backpackers, some taking advantage of the working holiday scheme

AGE PROFILE OF HOLIDAY VISITORS



Age demographic is determined based on their age at time of travel
 Source: Stats NZ international visitor arrivals Feb 2020

29% of Germans arrive in the South Island





GERMANY

VISITOR ACTIVITIES

Like the UK, Germany is largely skewed towards summer arrivals but have the longest length of stay and contribute strongly to regional economies



48%

ARRIVE IN SUMMER



20%

ARRIVE IN AUTUMN



6%

ARRIVE IN WINTER



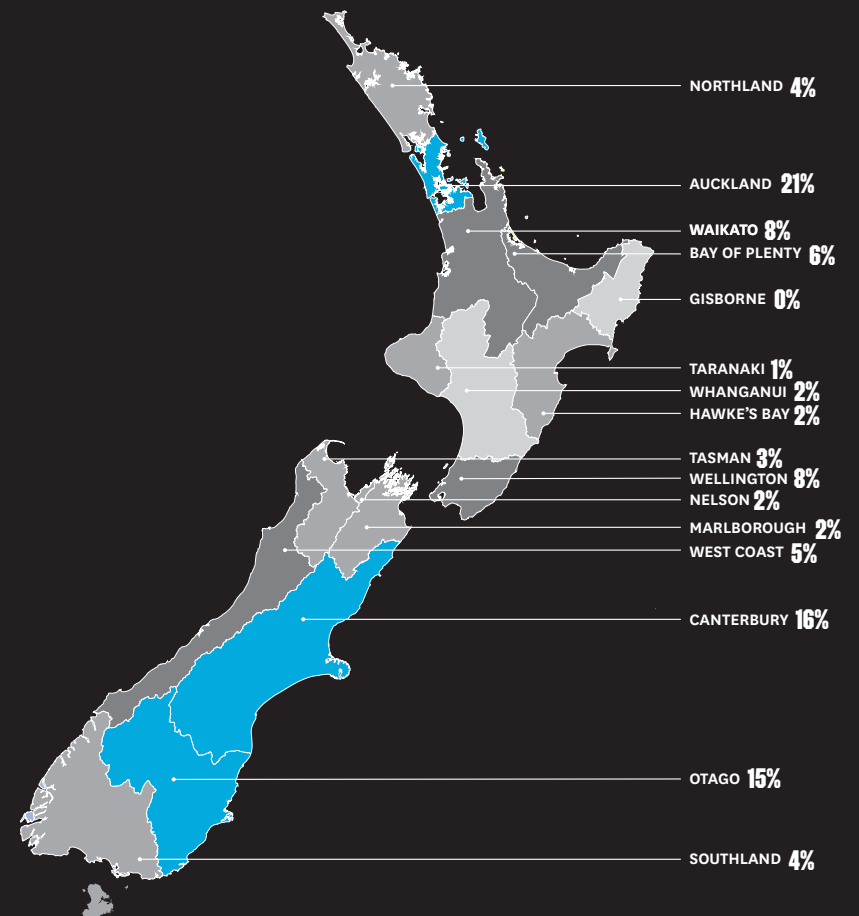
26%

ARRIVE IN SPRING

LENGTH OF STAY (DAYS)



Germany spends \$297M in the regions



Source: Stats NZ international visitor arrivals Feb 2020
 MBIE Regional Tourism Estimates Feb 2020
 MBIE International Visitor Survey December 2019



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ACTIVE CONSIDERER PROFILE

Active Considerers (ACs) are what we call our target audience. These people are aged 18-74, and have New Zealand as a preferred holiday destination in the next three years. They also indicate that they are prepared to spend €2,000 per person on their holiday.

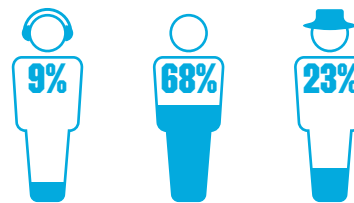
TOTAL ACTIVE CONSIDERERS

9.5M

APPROXIMATE NUMBER OF GERMAN ACTIVE CONSIDERERS (DEC 2019)



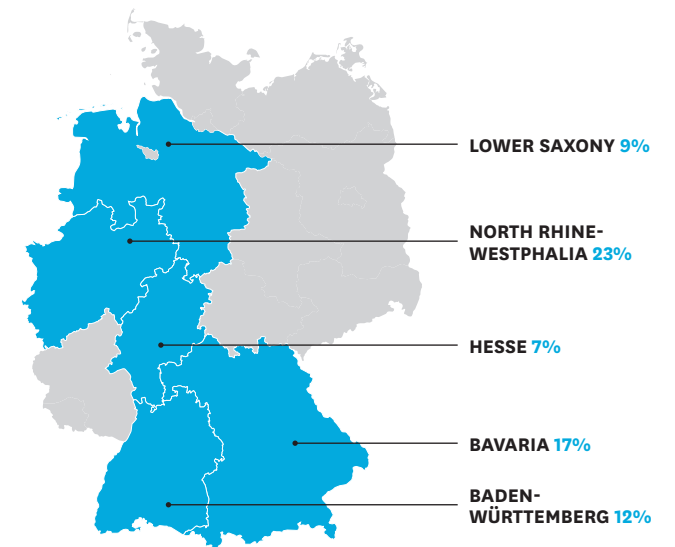
AGE SEGMENT OF ACTIVE CONSIDERERS



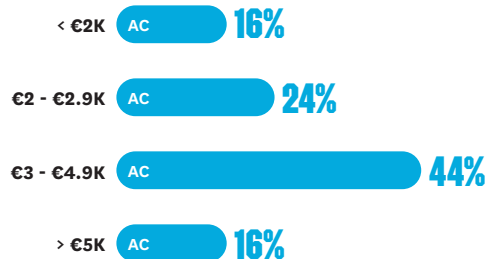
18-24 25-54 55-74

61% of ACs in Germany are male

REGIONAL SPREAD OF ACS



MONTHLY HOUSEHOLD INCOME OF ACS



TERTIARY EDUCATION OF ACS (BACHELOR'S DEGREE OR HIGHER)



Active considerer data is from the 6 month period ending April 2020

GERMANY

ACTIVE CONSIDERER METRICS



Over the last 12 months, appeal of NZ as a holiday destination has been slowly increasing, and prevalence of Active Considerers has remained steady.



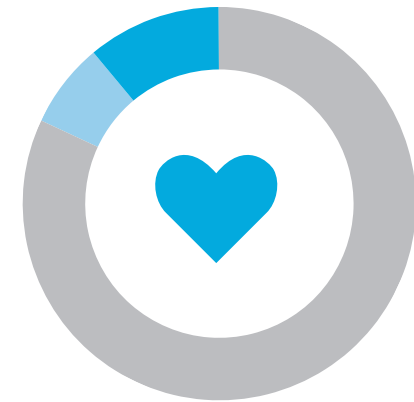
66%

ONLINE AUDIENCE 18-74 FIND
NEW ZEALAND APPEALING AS
A DESTINATION



18%

OF ONLINE AUDIENCE 18-74 ARE
ACTIVE CONSIDERERS



59%

ACTIVE CONSIDERERS RANK
NEW ZEALAND #1 OR #2 AS A
PREFERRED DESTINATION



GERMANY

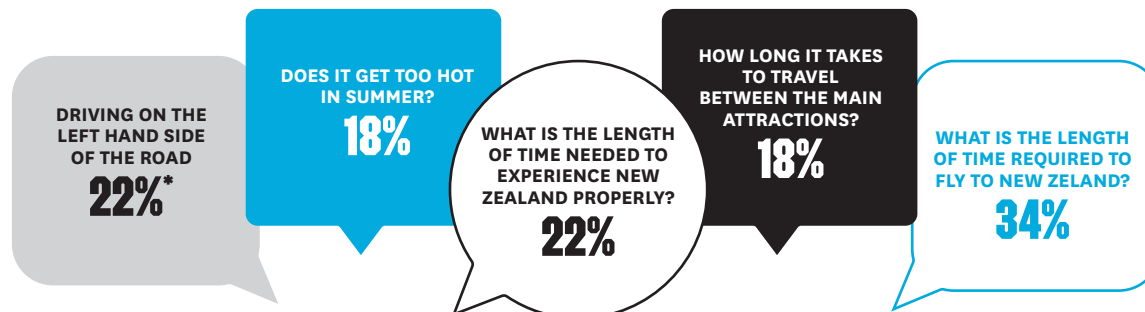
ACTIVE CONSIDERER MINDSET

WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY IN NEW ZEALAND?



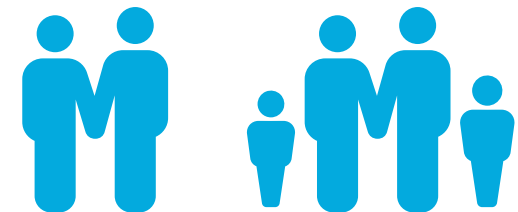
*the 55-74 age group are the most interested in getting in touch with nature (83%)

WHAT DO THEY NEED MORE INFORMATION ABOUT?

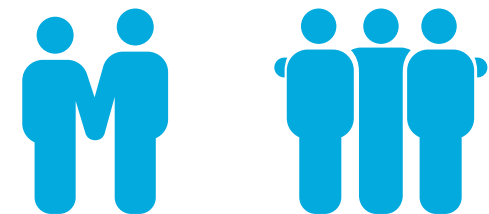


*55-74 age group are more concerned than the younger ACs about driving on the left hand side of the road (29%)

WHO ARE THEY MOST INTERESTED IN TAKING TRIPS WITH?



25-54 year old Active Considerers are interested in trips with their partner or as a family with children



55-74 year old Active Considerers are interested in trips with their partner or group of friends.

GERMANY

DEMAND FOR NEW ZEALAND REMAINS STRONG, DESPITE COVID-19



41%

OF GERMAN ACS HAVE AN IMPROVED PERCEPTION OF NEW ZEALAND

17%

OF GERMAN ACS EXPECT TO TRAVEL OVERSEAS LESS OFTEN AFTER COVID-19

