

# International Tourism Summary: Germany

## Year ending December 2019



**85,300 German visitors spent 1.5 million nights and \$135 million on trips to Victoria in the year ending December 2019.**

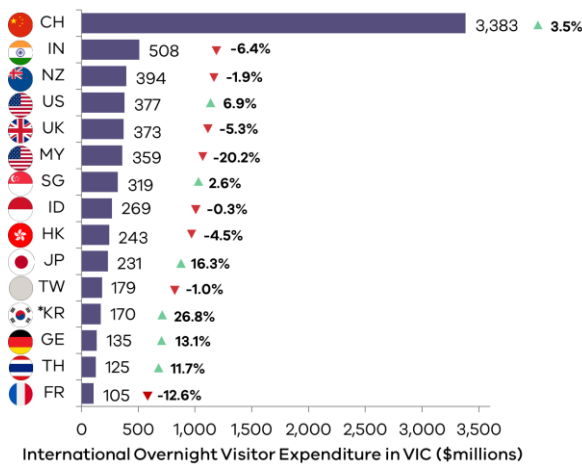
**SPEND**  
**\$135m**  
 ▲ +13.1% y/y  
 Share\*: 19.4% +2.6% pts.  
 AAG: +4.6% p.a. (2014-2019)

**VISITORS**  
**85.3k**  
 ▲ +8.0% y/y  
 Share\*: 43.1% +3.3% pts.  
 AAG: +2.6% p.a. (2014-2019)

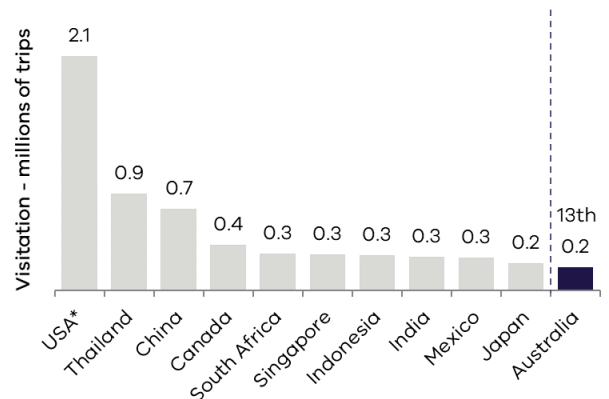
**NIGHTS**  
**1.5m**  
 ▼ -2.2% y/y  
 Share\*: 18.5% +1.1% pts.  
 AAG: -1.9% p.a. (2014-2019)

**Context:** In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

### International Overnight Expenditure in Victoria (\$m)



### Top 10 Out-of-Region Destinations for German Travellers



German visitors spent \$135 million on trips to Victoria in the year ending December 2019, a year-on-year increase of 13.1 per cent. This represents 1.5 per cent of all international overnight visitor spend in Victoria. Germany is ranked Victoria's 13<sup>th</sup> largest international market in terms of expenditure.

Australia was ranked #13 for visitation against other out-of-region destinations for German travellers in the year ending December 2019 (up from #14 in 2018).

\*USA including Hawaii Source: Tourism Economics, YE2019

\* In the year ending December 2019, all Korean visitors to Australia were from South Korea.

### AUSTRALIA



**\$692m** Spend ▼ -2.2%  
**198k** Visitors ▼ -0.2%  
**7.9m** Nights ▼ -7.9%

### NEW SOUTH WALES



**\$219m** Spend ► 0.0%  
**125k** Visitors ▼ -3.0%  
**2.8m** Nights ▲ 3.4%

### QUEENSLAND



**\$162m** Spend ▼ -9.3%  
**81k** Visitors ▼ -1.3%  
**1.9m** Nights ▼ -13.5%

The rate of growth of German expenditure on trips to Victoria (+13.1% year-on-year) was in contrast to the decline in the national average (-2.2%) and Queensland (-9.3%), while growth in New South Wales was stagnant (+0.0%).

### MELBOURNE



**\$103m** Spend ▼ -0.6%  
**80k** Visitors ▲ +5.3%  
**1.0m** Nights ▼ -11.9%

### REGIONAL VICTORIA



**\$32m** np  
**37k** Visitors ▲ +26.1%  
**424k** Nights ▲ +33.9%

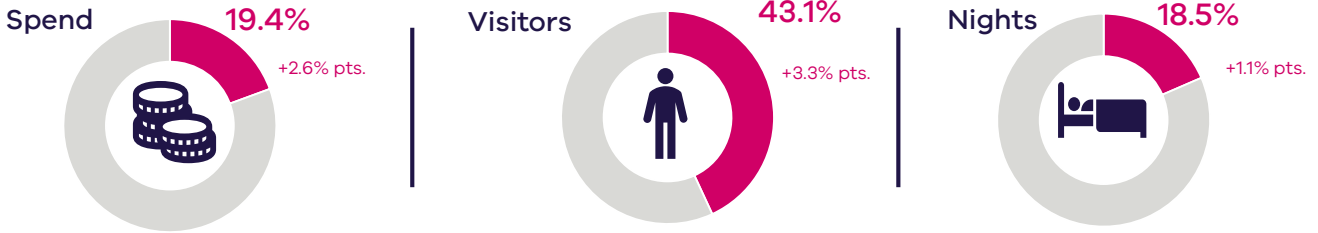
In the year ending December 2019:

- 80,000 German visitors spent 1.0 million nights and \$103 million on trips to Melbourne
- 37,000 German visitors spent 424,000 nights and \$32 million on trips to regional Victoria.

np = non-publishable (figures are below reliable and publishable thresholds)

## German Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of German spend, visitors and nights



### German Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from Germany Year Ending December	Total Expenditure (\$ million)					Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$		
	2014	2018	2019	Av Ann 14-19	% Change 18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	175	219	219	4.6% p.a.	0.0%	28.5%	30.9%	31.6%	73	80	78	1,466	1,695	1,748
<b>Victoria</b>	<b>108</b>	<b>119</b>	<b>135</b>	<b>4.6% p.a.</b>	<b>13.1%</b>	<b>17.6%</b>	<b>16.8%</b>	<b>19.4%</b>	<b>67</b>	<b>80</b>	<b>92</b>	<b>1,440</b>	<b>1,508</b>	<b>1,578</b>
Queensland	156	178	162	0.7% p.a.	-9.3%	25.5%	25.1%	23.3%	70	80	83	1,995	2,181	2,003
<b>Australia</b>	<b>612</b>	<b>708</b>	<b>692</b>	<b>2.5% p.a.</b>	<b>-2.2%</b>				<b>71</b>	<b>83</b>	<b>88</b>	<b>3,454</b>	<b>3,576</b>	<b>3,502</b>

<b>Total VIC International Expenditure</b>	4,903	8,467	8,826	12.5% p.a.	4.2%
<b>Germany's Share of VIC International Expenditure</b>	2.2%	1.4%	1.5%		

AAG = Average Annual Growth

NB: Visitor expenditure includes expenditure on packages attributable to destination. Estimates may differ from those published by Tourism Australia

Source: Regional Expenditure Model, International Visitor Survey, December 2014-2019, Tourism Research Australia, Canberra.

Victoria received 19.4 per cent of German overnight visitors' expenditure in Australia in the year ending December 2019, behind key competitor states New South Wales (31.6%) and Queensland (23.3%). German visitors' expenditure per night in Victoria (\$92) was higher than the national average (\$88), Queensland (\$83) and New South Wales (\$78). Victoria received a lower total spend per visitor (\$1,578) than Queensland (\$2,003) and New South Wales (\$1,748).

### German Overnight Visitation (000s) to Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19	Share of Visitors %
<b>Australia</b>	<b>177</b>	<b>179</b>	<b>192</b>	<b>200</b>	<b>198</b>	<b>198</b>	<b>2.2% p.a.</b>	<b>-0.2%</b>	
New South Wales	119	116	126	132	129	125	1.0% p.a.	-3.0%	63%
<b>Victoria</b>	<b>75</b>	<b>74</b>	<b>84</b>	<b>84</b>	<b>79</b>	<b>85</b>	<b>2.6% p.a.</b>	<b>8.0%</b>	<b>43%</b>
Queensland	78	79	85	91	82	81	0.6% p.a.	-1.3%	41%

NB: Where there is a '-'; figures are unreliable and are unable to be published.

The year-on-year increase in German overnight visitor numbers to Victoria (+8.0%) was in contrast to the decline seen at the national level (-0.2%), in New South Wales (-3.0%) and in Queensland (-1.3%) in the year ending December 2019. Over the longer term (2014 to 2019), German overnight visitors to Victoria increased at an average annual rate of 2.6 per cent, ahead of the national average (+2.2% p.a.), New South Wales (+1.0% p.a.) and Queensland (+0.6% p.a.).

### German Visitor Nights (000s) in Australia by Key States, 2014-2019

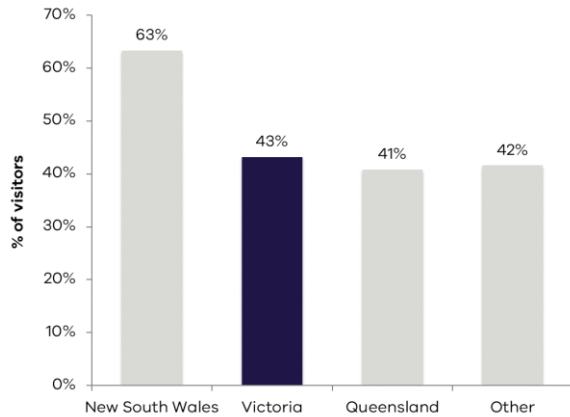
Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19	Share of Nights %
<b>Australia</b>	<b>8,615</b>	<b>8,777</b>	<b>8,943</b>	<b>8,890</b>	<b>8,543</b>	<b>7,869</b>	<b>-1.8% p.a.</b>	<b>-7.9%</b>	
New South Wales	2,409	2,721	2,803	2,671	2,724	2,818	3.2% p.a.	3.4%	36%
<b>Victoria</b>	<b>1,602</b>	<b>1,491</b>	<b>1,718</b>	<b>1,722</b>	<b>1,492</b>	<b>1,459</b>	<b>-1.9% p.a.</b>	<b>-2.2%</b>	<b>19%</b>
Queensland	2,218	2,464	2,095	2,460	2,240	1,938	-2.7% p.a.	-13.5%	25%

NB: Where there is a '-'; figures are unreliable and are unable to be published.

In the year ending December 2019, German visitor nights to Victoria declined by 2.2 per cent year-on-year, a smaller decline than at the national level (-7.9%) and in Queensland (-13.5%), but in contrast to the growth seen in New South Wales (+3.4%). Over the longer term (2014 to 2019), German visitor nights spent in Victoria declined at an average annual rate of 1.9 per cent, smaller than the decline in Queensland (-2.7% p.a.), in line with the national average (-1.8% p.a.) and in contrast to growth in New South Wales (+3.2% p.a.).

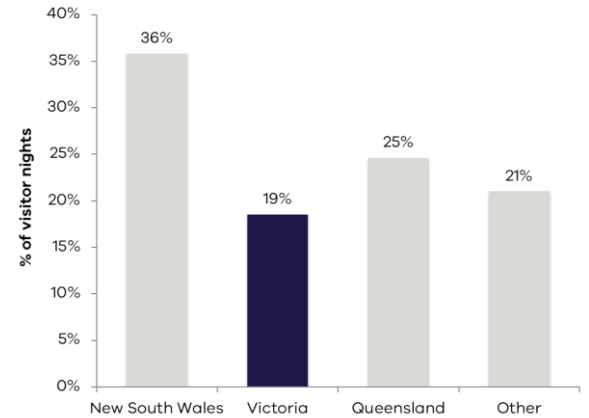
## Market Share by Key States<sup>1</sup>

German Overnight Visitors to Australia  
Year ending December 2019 – Market Share by Key States



In the year ending December 2019, 43 per cent of German visitors to Australia stayed overnight in Victoria; ahead of Queensland (41%) but behind New South Wales (63%).

German Visitor Nights to Australia  
Year ending December 2019 – Market Share by Key States



Victoria's market share of visitor nights spent by German travellers to Australia in the year ending December 2019 was 19 per cent; behind New South Wales (36%) and Queensland (25%).

## Main Purpose of Trip (000s) to Australia by Key States Visited and Market Share

Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Total
New South Wales	85	16	102	11	125
Market Share %	69%	46%	64%	52%	63%
<b>Victoria</b>	<b>58</b>	<b>12</b>	<b>70</b>	<b>9</b>	<b>85</b>
Market Share %	<b>46%</b>	<b>34%</b>	<b>44%</b>	<b>45%</b>	<b>43%</b>
Queensland	61	12	73	-	81
Market Share %	49%	34%	46%	-	41%
<b>Australia</b>	<b>124</b>	<b>36</b>	<b>160</b>	<b>21</b>	<b>198</b>

\* Total Leisure = Holiday + VFR

NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

In the year ending December 2019, 44 per cent of German leisure visitors to Australia stayed overnight in Victoria, including 46 per cent of holiday and 34 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of German leisure visitors was higher at 64 per cent, as was Queensland's share at 46 per cent. During the same period, Victoria's share of the German business market was 45 per cent.

## Purpose of Visit to Victoria (and the Destinations Within)

Some international visitors to Victoria visit more than one destination in the state, and for different purposes. For example, a visitor might stay in Melbourne for education reasons, and visit the Great Ocean Road region for a holiday. As such, the percentages of international visitors who visited Victoria for each purpose total more than 100 per cent.

German Overnight Expenditure and Visitation to Victoria by Destination Purpose of Visit – Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Total
<b>Overnight Expenditure (\$M)</b>	83	-	101	-	135
<b>Overnight Visitors (000s)</b>	67	15	76	10	85
<b>Visitor Nights (000s)</b>	933	270	1,203	-	1,459
<b>Average Length of Stay</b>	13.9	17.9	15.8	-	17.1
<b>Spend per Visitor</b>	1,238	-	1,335	-	1,578
<b>Spend per Night</b>	89	-	84	-	92

\* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one purpose)

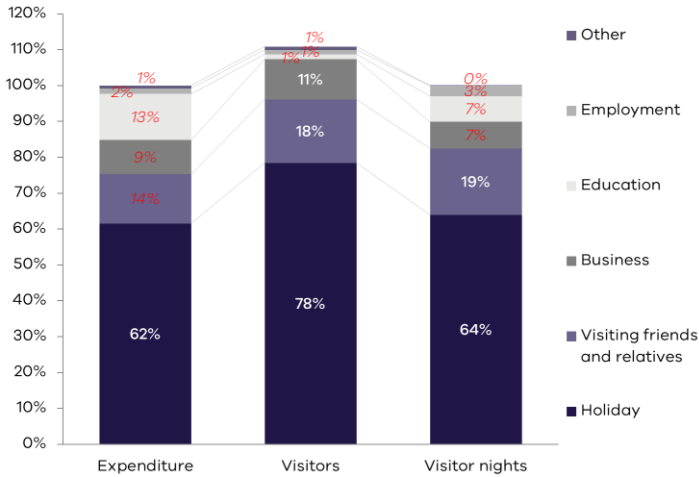
NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

<sup>1</sup>NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

# German Overnight Expenditure, Visitors and Nights to Victoria by Purpose of Visit

## Year Ending December 2019



In the year ending December 2019, leisure visitors accounted for 75 per cent of German visitor expenditure in Victoria, including 62 per cent of spend contributed by holiday visitors.

During the same period, 78 percent of German visitors travelled to Victoria for holiday purposes, 18 per cent travelled for VFR and a further 11 per cent came on business.

Sixty-four per cent (64%) of all nights spent in Victoria by German visitors in the year ending December 2019 were accounted for by holiday visitors, while VFR visitors accounted for 19 per cent of visitor nights.

Note: Percentages of visitors will not add up to 100% as visitors can travel to multiple destinations in Victoria with different purposes.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

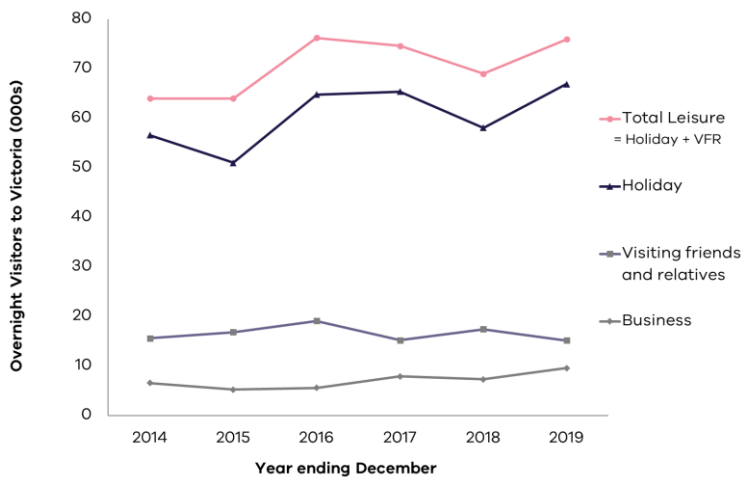
## German Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	57	51	65	65	58	67	3.4% p.a.	15.2%
Visiting friends and relative	16	17	19	15	17	15	-0.6% p.a.	-13.1%
Total Leisure	64	64	76	75	69	76	3.5% p.a.	10.1%
Business	7	5	6	8	7	10	7.8% p.a.	30.7%

NB: Where there is a '-', figures are unreliable and are unable to be published.

NB: Figures for 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

## German Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019



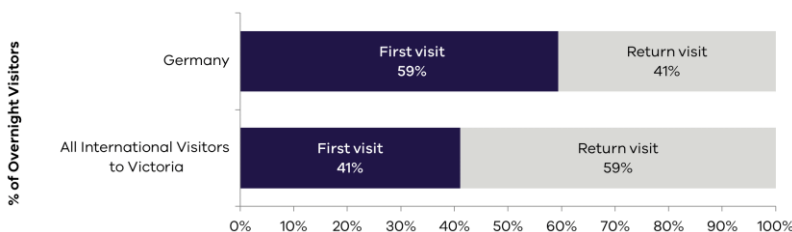
Of all the main purpose segments, the German business market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+7.8% p.a.).

Holiday visitors have increased at an average annual rate of 3.4 per cent over the same period, while VFR visitors have declined (-0.6% p.a.).

Overall, overnight German leisure visitors to Victoria have increased at an average annual rate of 3.5 per cent per annum over the period 2014-2019.

## Repeat Visitation to Australia

### Repeat Visitation to Australia (% of German overnight visitors to Victoria vs all international overnight visitors to Victoria)



In the year ending December 2019, 59 per cent of overnight visitors from Germany to Victoria were visiting Australia for the first time, compared with 41 per cent of international overnight visitors to Victoria overall.

## Melbourne and Regional Victoria Overnight Visitation

### German Overnight Visitation (000s) to Victoria, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	70	69	76	80	76	80	2.7% p.a.	5.3%
Regional Victoria	30	28	33	34	30	37	4.2% p.a.	26.1%
<b>Victoria</b>	<b>75</b>	<b>74</b>	<b>84</b>	<b>84</b>	<b>79</b>	<b>85</b>	<b>2.6% p.a.</b>	<b>8.0%</b>

NB: Where there is a '-', figures are unreliable and are unable to be published.

There were 80,000 German overnight visitors to Melbourne in the year ending December 2019, a 5.3 per cent increase over the previous year. German visitors to Melbourne have grown at an average annual rate of 2.7 per cent over the period 2014 to 2019.

In the year ending December 2019, there were 37,000 German overnight visitors to regional Victoria, a 26.1 per cent increase year-on-year. Over the longer term (2014-19), German overnight visitors to regional Victoria have grown at an average annual rate of 4.2 per cent per annum.

### German Visitor Nights (000s) to Victoria, 2 years<sup>2</sup> (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	2,248	2,451	2,511	2,574	2,383	2,210	-0.3% p.a.	-7.2%
Regional Victoria	614	643	698	867	832	741	3.8% p.a.	-10.9%
<b>Victoria</b>	<b>2,862</b>	<b>3,094</b>	<b>3,209</b>	<b>3,440</b>	<b>3,214</b>	<b>2,951</b>	<b>0.6% p.a.</b>	<b>-8.2%</b>

NB: Where there is a '-', figures are unreliable and are unable to be published.

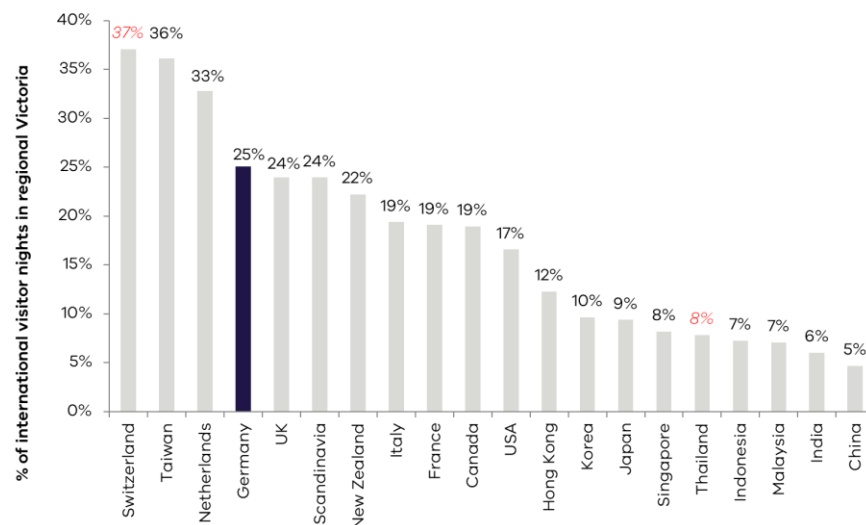
German visitors spent 2.2 million nights in Melbourne in the two years ending December 2019, a decline of 7.2 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum\*), visitor nights spent in Melbourne decreased at an average annual rate of 0.3 per cent.

In the two years ending December 2019, German visitors spent 741,000 nights in regional Victoria, representing a decline of 10.9 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum\*), visitor nights spent in regional Victoria increased at an average rate of 3.8 per cent.

\* where 2014 includes years ending December 2013 and 2014 and 2019 includes years ending December 2018 and 2019.

## Regional Dispersal

### Regional Dispersal of Top 20 International Overnight Markets to Victoria – 2 Years Ending December 2019



Of the 3.0 million nights spent in Victoria by German visitors in the two years ending December 2019, 25 per cent (741,000) of them were spent in regional Victoria.

German visitors to Victoria have the 4<sup>th</sup> highest rate of overnight dispersal of all the state's top 20 international markets.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

<sup>2</sup> Two years of data are used to increase reliability of the figures.

## Places Visited in Regional Victoria and Melbourne Attractions

### Places Visited in Regional Victoria – Year Ending December 2019

Selected Places Visited - Overnight Visit or Daytrip (% of all Overnight Visitors to Victoria)	Germany Visitors	All International Visitors
Ballarat, Sovereign Hill	-	6%
Bendigo	-	3%
Daylesford, Hepburn Springs, Mt. Macedon	-	1%
Geelong & the Bellarine Peninsula	18%	9%
Great Ocean Road/Twelve Apostles	51%	33%
Healesville Sanctuary	-	2%
Mornington Peninsula	14%	8%
Phillip Island/Penguin Parade	20%	17%
Puffing Billy and Dandenong Ranges	6%	10%
Victorian Snowfields	-	2%
Wilson's Promontory	11%	3%
Yarra Valley	16%	12%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In the year ending December 2019, 51 per cent of German overnight visitors to Victoria spent time (daytrip or overnight) in the Great Ocean Road/Twelve Apostles region. This region is very popular generally, with 33 per cent of all international overnight visitors to Victoria travelling there.

Twenty per cent (20%) of German overnight visitors to Victoria went to the Phillip Island/Penguin Parade area (compared with 17 per cent of international overnight visitors to Victoria overall) and 18 per cent visited the Geelong and the Bellarine region (compared with nine per cent of international visitors overall).

### Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	Germany Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	12%	4%
Brunswick Street	16%	10%
Chadstone Shopping Centre	7%	15%
Chapel Street	12%	9%
Crown Casino/entertainment complex	16%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	29%	19%
Federation Square	50%	38%
Melbourne CBD Shopping Precinct	65%	63%
Melbourne Cricket Ground (MCG)	-	6%
Melbourne Museum (Royal Exhibition Building)	16%	16%
Melbourne Zoo	-	8%
National Gallery of Victoria (NGV)	21%	17%
Queen Victoria Market	57%	44%
Shrine of Remembrance	19%	12%
Southbank/Southgate	44%	26%
St Kilda	51%	28%

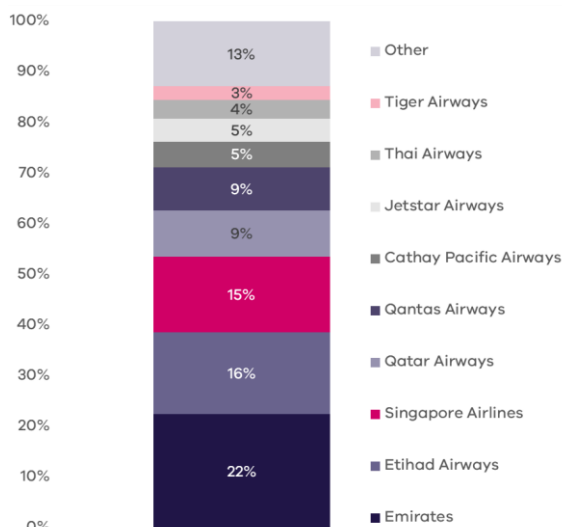
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most visited Melbourne attractions by German overnight visitors to Victoria were the CBD shopping precinct (65 per cent compared with 63 per cent of international visitors overall) and Queen Victoria Market (57 per cent of German overnight visitors compared with 44 per cent of international visitors overall).

Other attractions that German visitors were more likely to visit compared to international visitors overall included St Kilda (51 per cent of German overnight visitors compared with 28 per cent of international visitors overall), Federation Square (50 per cent compared with 38 per cent of international overnight visitors to Victoria overall), Southbank/Southgate (44 per cent compared with 26 per cent of international overnight visitors to Victoria overall) and Docklands/Marvel Stadium (29 per cent compared with 19 per cent of international overnight visitors to Victoria overall), among others.

## Aviation<sup>3</sup>

### Airline Market Share – German International Arrivals into Melbourne – Year ending December 2019



In the year ending December 2019, Emirates (22%), Etihad Airways (16%), Singapore Airlines (15%), Qatar Airways (9%) and Qantas Airways (9%) had the greatest share of German international arrivals into Melbourne.

<sup>3</sup> Note: Aviation capacity is measured by "available seats", which includes international visitors and Australian residents returning home.

## Sources:

- International Visitor Survey (IVS), years ending December 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Tourism Australia Consumer Demand Project, Tourism Economics, April 2020
- International Airlines Operated Flights and Seats, year ending December 2019, Department of Infrastructure and Regional Development (BITRE)
- Visitor Arrivals and Departures, year ending December 2019, Tourism Research Australia

Base for IVS and Expenditure data: Only those trips where International visitors aged 15 years or over who have stayed in Australia for less than 12 months are in scope. Expenditure includes package expenditure.

Figures that are unreliable and unable to be published are represented by '-'. Figures might not add up due to rounding.

To view the full suite of 15 International Tourism Summaries (Victoria's top 15 international markets in terms of expenditure, visitors and nights), see <https://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on IVS and Expenditure data sources used please refer to our Guide to Tourism Data Sources and Definitions document found here: <https://www.business.vic.gov.au/tourism-industry-resources/research/teve-research>

For further information on Tourism Australia's Consumer Demand Project, see <http://www.tourism.australia.com/en/markets-and-research/reports/consumer-research.html>

Further information on international visitor statistics: <https://www.tra.gov.au/international>;  
<http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

Factsheet produced by the TEVE Research Unit, May 2020.

Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for the use of this information.