

Central Europe International Market Factsheet

Marketing Overview

The German speaking market of Central Europe is a long term traditional market for the Northern Territory. The *Northern Territory's Tourism Industry Strategy 2030* sets out high level targets based on the International Visitor Survey results and the 2030 target for the German and Swiss markets combined is 50,000 holiday visitors. This equates to a 3.1% compound average annual growth rate.

In 2019 the Northern Territory held a 13.8% share of the German and Swiss market of inbound arrivals to Australia. These markets are strategically important due to their long length of stay, high average spend and the dispersal rate of visitors.

Average vacation entitlement in Switzerland and Germany is between four and six weeks. Both markets have relatively high purchasing power and federally mandated vacations which results in a high proportion of the population travelling.

58% of German 'High Value Travellers' (HVT) are booking their travel online, with an average lead time of 3-6 months (50%). Main planning sources are friends and relatives (46%), travel books (33%), internet searches (31%), brochures (30%) and offline travel agents (23%). With 1.2 million HVTs in Germany considering Australia (11% of the German long-haul travel market), the market represents a good opportunity for the Northern Territory.

Target Market Profile

1. Mature-aged market (aged 40-59 years) - high disposable income, experienced travellers without dependent children, who have a desire to travel long-haul and immerse themselves in natural and culturally different landscapes.
2. Youth travellers aged 18-29 years including those travelling for life experience (Working Holiday Makers and backpackers) and improvement of English-language skills before entering the workforce and or commencing / completing tertiary education (school leavers, students and graduates).

ALL PURPOSE	GERMANY		SWITZERLAND		CENTRAL EUROPE	
	2019	YOY CHANGE	2019	YOY CHANGE	2019	YOY CHANGE
VISITORS	26,000	-9.1%	8,000	-22%	34,000	-13%
NIGHTS	244,000	-4.4%	73,000	+6.1%	317,000	-2.2%
EXPENDITURE	\$35.2M	-20%	\$17.2M	-19%	\$52.4M	-20%
ALOS* (nights)	9.4	+0.5	8.8	+2.3	9.2	+1.0
ASPT (average spend per trip)	\$1,353	-\$182	\$2,078	+\$79	\$1,528	-\$132
VISITOR MARKET SHARE	13.2%	-1.3pp	16.4%	-3.3pp	13.8%	-1.8pp

*average length of stay

Strategic Opportunities

Consumer-facing campaigns to generate interest and demand	Protecting market share in a steadily growing outbound travel market	Growing the number of well dispersing, long staying and high spending visitors	Strengthening cooperation with trade partners	Training agents to increase their destination and product knowledge
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Market Profile

ANNUAL LEAVE

 **4-6 WEEKS**

SEASONALITY



TARGET REGIONS

- Bavaria (Munich)
- Baden-Wuerttemberg (Stuttgart)
- Hamburg
- Berlin
- Hesse (Frankfurt)
- North Rhine-Westphalia (Dusseldorf and Cologne)
- Zurich
- Vienna



SPECIAL INTERESTS

- Nature – Uluru, Kakadu and outback experiences
- Culture – Aboriginal and pioneer heritage
- Niche activities – Birding, fishing and soft adventure

TRAVEL PARTY

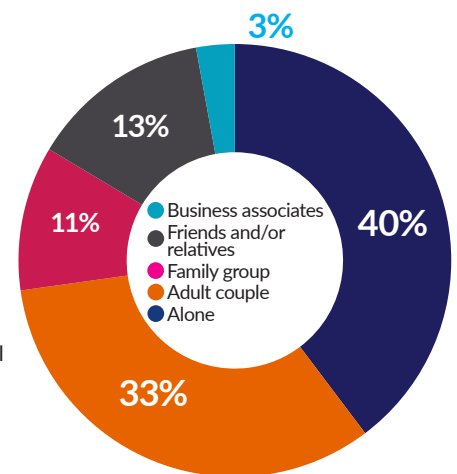
75%

of Central European all-purpose visitors were Free Independent Travellers (FIT)

73%
23%

of Central European visitors were travelling alone or as an adult couple

of the visitor nights were in a hotel/ motel style accommodation while **32%** were in backpacker accommodation/ hostels



AVIATION



INTERNATIONAL AIRLINE ACCESS



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CHEAPEST RETURN AIRFARES*

FRANKFURT - DARWIN (1 STOP)

\$2,664

* Expedia - depart 1/12/19 and return 1/01/20

FRANKFURT - DARWIN (1 STOP)

\$1,615

* Expedia - depart 1/05/20 and return 1/06/20

Distribution Germany

- DER Touristik
- DERTOUR
- Meiers Weltreisen
- TUI Germany
- Boomerang Reisen
- FTI Touristik GmbH
- Best of Travel Group
- Explorer Fernreisen
- Studiosus
- STA Travel
- HM Touristik
- Australia Tours
- Erlebe Fernreisen
- TravelEssence
- Art of Travel
- Windrose
- Tourlane
- GEBECO
- Urlaubsguru
- Expedia
- Kayak

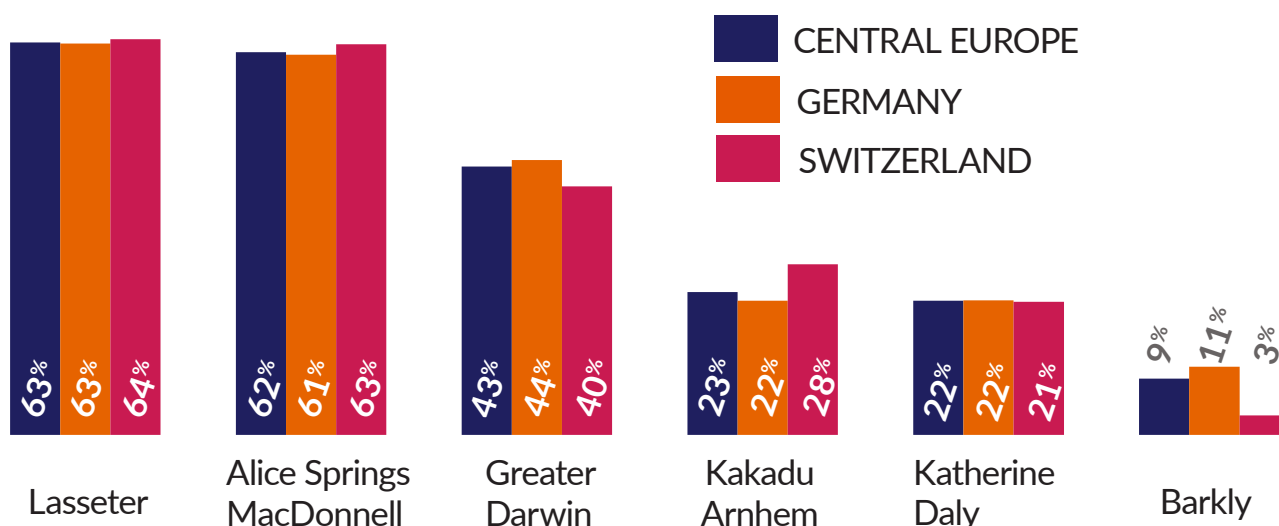
Distribution Switzerland

- Travelhouse
- Knecht Reisen
- Globetrotter
- TUI Suisse
- DER Touristik Suisse (formerly Kuoni Switzerland)
- Dreamtime Travel
- Oceania Reisen

Major Online Travel Agents

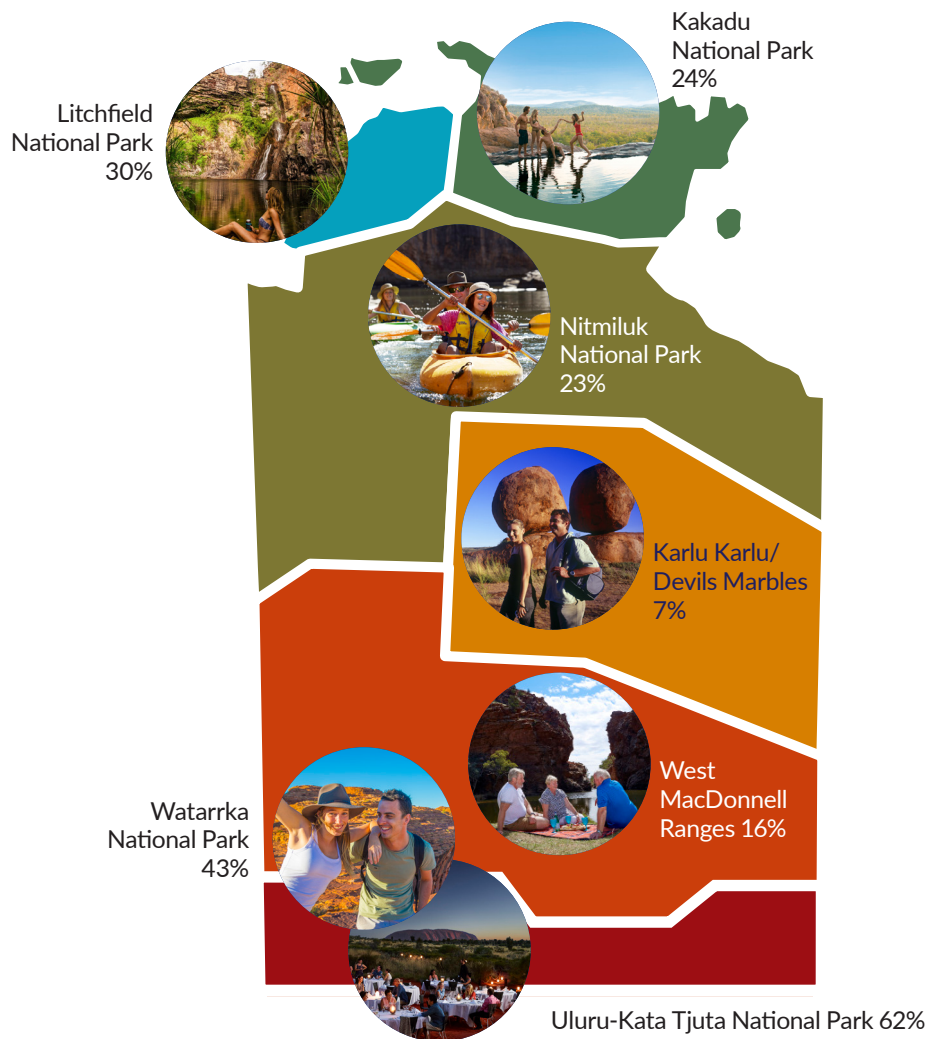


Overnight visitors to NT regions



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Visitors to NT destinations - overnight and day trips



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