



# MARKET INSIGHTS GUIDES

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Germany

**GAIN A DETAILED UNDERSTANDING  
OF DQ AND LWT'S GEOGRAPHIC  
FOCUS MARKETS THROUGH  
PROFILES THAT EXPLORE KEY DATA  
POINTS, TRAVELLER MOTIVATIONS,  
EXPERIENCE, EVOLVING TRENDS  
AND MARKET CONTEXTS**

The Market Insights Guides are designed to support members by providing useful insights into visitors from the RTO's key focus markets. Each guide includes up-to-date information on visitor behaviours, current trends, and what travellers are seeking to experience both in the Queenstown Lakes district and wider New Zealand.

The guides are informed by a range of reputable district and national data sources, including the Queenstown Lakes Visitor Experience Survey, New Zealand International Visitor Survey, and International Visitor Arrivals data. Slight variations between guides exist in cases where specific data or research is unavailable, or the sample size is limited.



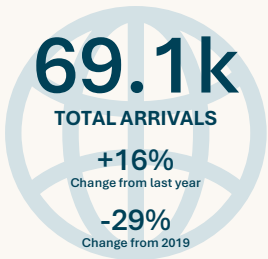
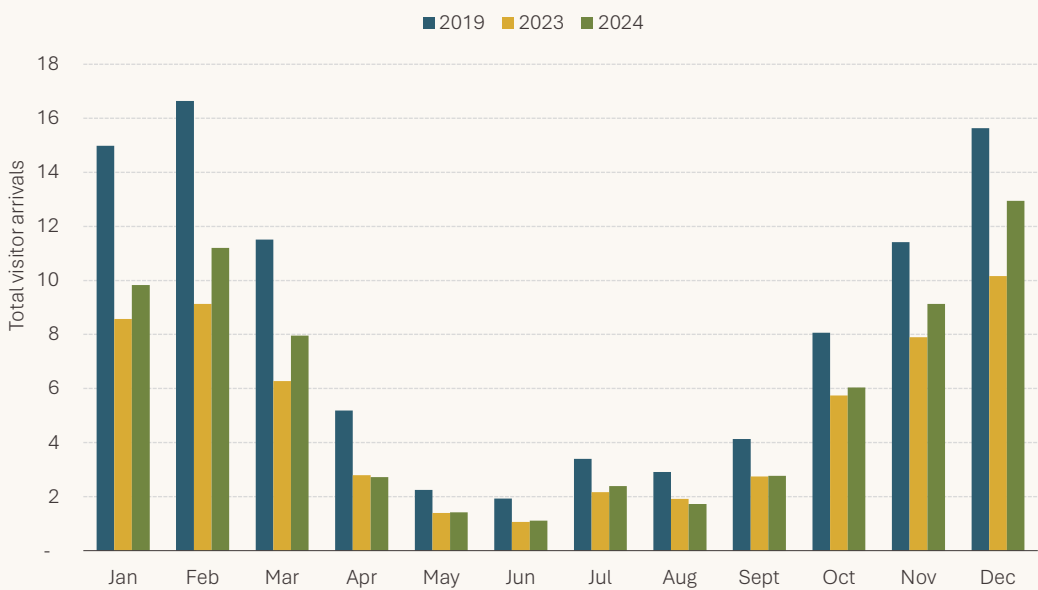


# NEW ZEALAND TRAVEL INSIGHTS

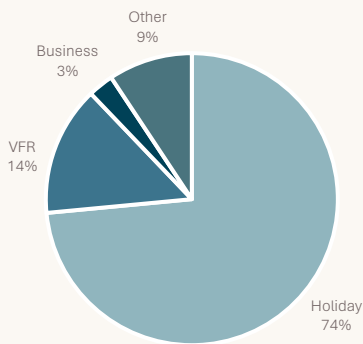
## INTERNATIONAL VISITOR ARRIVALS INSIGHTS

In 2024, New Zealand welcomed 69,253 international visitor arrivals from Germany, accounting for 2% of total international arrivals and making Germany New Zealand’s seventh largest international visitor market. Of these, 50,730 were holiday visitors, representing 74% of total Germany’s arrivals.

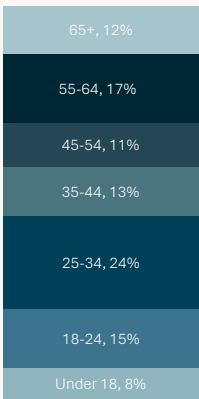
### INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2024)



### PURPOSE OF VISIT



### AGE BREAKDOWN



### SEASONALITY

	TOTAL	HOLIDAY
	50.3%	51.5%
	16.9%	16.8%
	7.5%	5.2%
	25.2%	26.5%



# NEW ZEALAND TRAVEL INSIGHTS

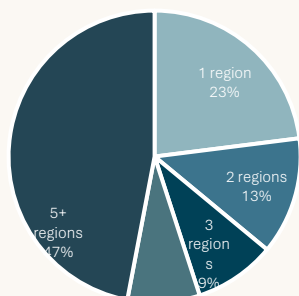
## NEW ZEALAND TRIP INSIGHTS

55% of German visitors travelled to more than four regions in NZ. They spent approximately \$485 million, including \$397 million by holidaymakers. Average spend per trip was \$8,112, rising to \$8,808 for holiday visitors. Average length of stay total is 49 days, with a length of stay of 43 days for holiday visitors.

### REGIONAL VISITATION

**55%**

OF VISITORS STAY A NIGHT IN 4+ REGIONS



Total visitors that stayed in

**32%**

QUEENSTOWN

**16%**

WĀNAKA

Holiday visitors that stayed in

**34%**

QUEENSTOWN

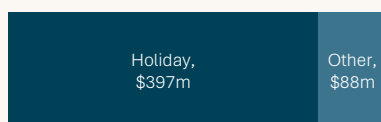
**19%**

WĀNAKA

### SPEND (\$M)

**\$485m**

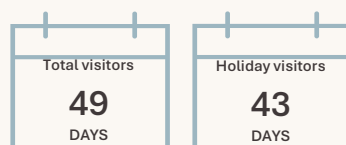
TOTAL MARKET SPEND



Total visitors  
**\$8,112**  
AVERAGE SPEND PER TRIP

Holiday visitors  
**\$8,808**  
AVERAGE HOLIDAY SPEND PER TRIP

### LENGTH OF STAY



### TOP FIVE MOTIVATORS FOR VISITING NEW ZEALAND



Its landscapes & scenery



I've always wanted to visit



The Lord of the Rings movies



It was somewhere new, I had never been there before



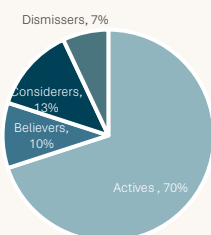
Visiting friends and family that live in NZ

## SUSTAINABILITY AND TRAVEL FOR TRAVELLERS INTERESTED IN NZ

### SUSTAINABILITY MINDSET

**80%**

ACTIVE OR BELIEVERS



80% of German people who find NZ an appealing holiday destination fall into Kantar's sustainability segments of Actives or Believers, higher than the Germany's average of 53%.

### CURRENT SUSTAINABLE TRAVEL CHOICES



**71%**

are willing to invest time and money to make sustainable choices

### FUTURE SUSTAINABLE TRAVEL CHOICES



**73%**

believe that in future they will have to increase efforts to travel in a more sustainable way.

### PERCEIVED BARRIERS THAT PREVENT SUSTAINABLE TRAVEL



More expensive



Hard to identify if operations are sustainable



Destinations lack sustainable infrastructure

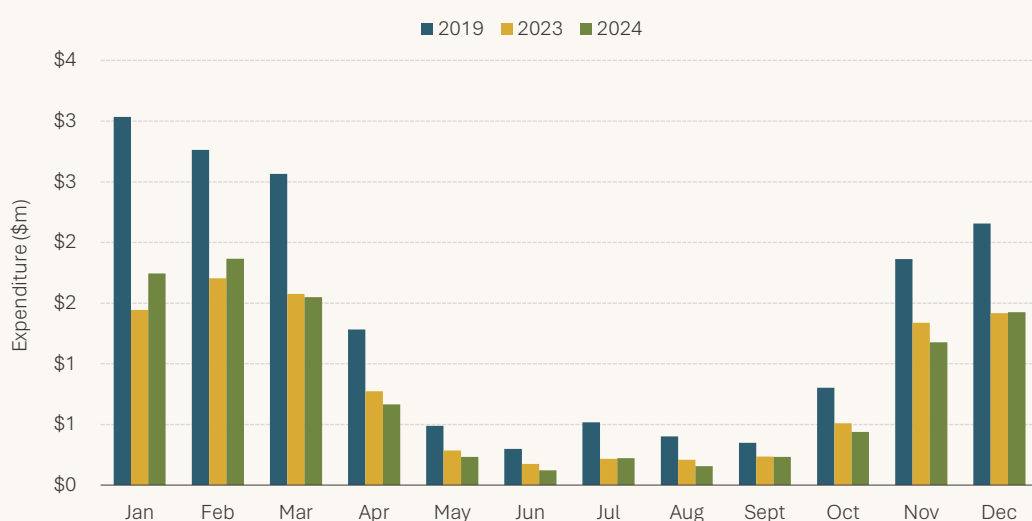


# QUEENSTOWN LAKES TRAVEL INSIGHTS

## TOURISM RELATED EXPENDITURE INSIGHTS

In 2024, total visitor expenditure from the German market in the Queenstown Lakes reached \$9.8m, accounting for 2.1% of total international expenditure.

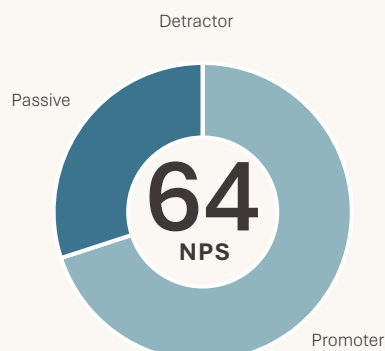
### EXPENDITURE (\$M) BY MONTH (2019 AND 2023 COMPARED TO 2024)



## VISITOR EXPERIENCE INSIGHTS\*

Queenstown Lakes boasts a Net Promoter Score (NPS) of +64 over the past 12 months from German visitors indicating advocacy for the region as a visitor destination.

### NET PROMOTER SCORE



### TOP MOTIVATIONS FOR VISITING THE QUEENSTOWN LAKES DISTRICT



\* the sample size for this market is limited; please interpret the results with caution.



# QUEENSTOWN LAKES TRAVEL INSIGHTS

## VISITOR EXPERIENCE INSIGHTS\*

### LOCATIONS VISITED



3.8

AVERAGE NUMBER OF LOCATIONS VISITED

81%	Queenstown town centre
76%	Wānaka town centre
43%	Arrowtown
43%	Lake Hāwea
24%	Frankton
19%	Glendhu Bay + surrounds
19%	Makarora + surrounds
16%	Glenorchy
14%	Arthur's Point
11%	Lake Hayes
8%	Cardrona Valley
8%	Kingston
8%	Luggate
5%	Gibbston Valley
81%	Queenstown town centre

### ACTIVITIES UNDERTAKEN



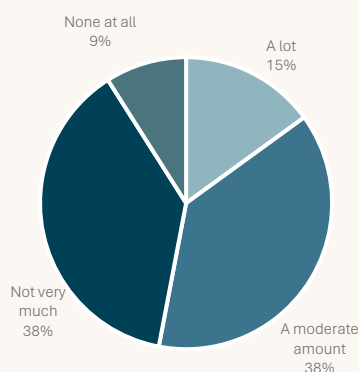
5.3

AVERAGE NUMBER OF ACTIVITIES UNDERTAKEN

Top Activities		
	89%	Walking and hiking
	79%	Restaurants and cafés
	58%	Shopping
	47%	Sightseeing
	24%	Bars/nightclubs
	16%	Adrenaline activities
	13%	Art galleries, museums, historic sites
	13%	Lake cruising and river activities
	8%	Cultural or heritage experiences
	8%	Cycling/biking
	8%	Flying/air activities
	8%	Ski, snow, ice activities
	8%	Wellness experiences
	5%	Community event/giving back
	5%	Farm, animal or nature experience
	5%	Land activities
	5%	Wineries or other wine experiences

## SUSTAINABLE TRAVEL ATTITUDES AND BEHAVIOURS\*

### INTERACTION WITH LOCALS



### TOP SUSTAINABLE TRAVEL ATTITUDES HELD



Respecting and preserving local heritage and traditions of a destination



Protecting and restoring the local environment at a destination



Leaving places better than they were when you arrived



Considering carbon emissions when travelling to a destination

### TOP SUSTAINABLE TRAVEL BEHAVIOURS TAKEN IN REGION



Travelled outside of peak season to limit impacts



Limited my environmental impact by reducing excess waste (e.g. by avoiding single-use plastics)



Reduced carbon emissions public transport, walking/ cycling to get around



Slowed down and stayed longer than most other visitors

\* the sample size for this market is limited; please interpret the results with caution.



# MARKET CONTEXT INSIGHTS

## OVERVIEW

Germany, Europe's largest economy, values order, efficiency, and social responsibility, maintaining a strong and diverse economic foundation alongside a strong commitment to environmental protection and sustainability. The economic outlook for 2025 indicates a modest recovery following recent stagnation, with GDP expected to grow by 0.7% following a 0.1% contraction in 2024. Germany also has a deep-rooted commitment to environmental protection, achieving a 40% emissions reduction since 1990. However, challenges like climate change, biodiversity loss, and water pollution persist, despite significant progress.

## ECONOMIC

Germany's economy shrank by 0.2% in 2024, hindered by elevated energy costs and weak global demand. However, stabilisation followed in Q1 2025, with a 0.2% quarter-on-quarter expansion supported by increased investment and exports. Inflation has eased markedly, with the consumer price index rising just 2.1% year-on-year in April 2025. The labour market has proven resilient, with unemployment stable around 3%. Nonetheless, the outlook remains pessimistic: the Bundesbank projects growth of only 0.2% in 2025 and 0.8% in 2026 due to structural challenges and global uncertainty. Inflation is expected to remain slightly above target in 2025 (2.4%) before declining. Strengths include a robust industrial base and leadership in green innovation. Key challenges involve transitioning industry, addressing high energy costs, labour shortages, and ensuring fiscal sustainability.

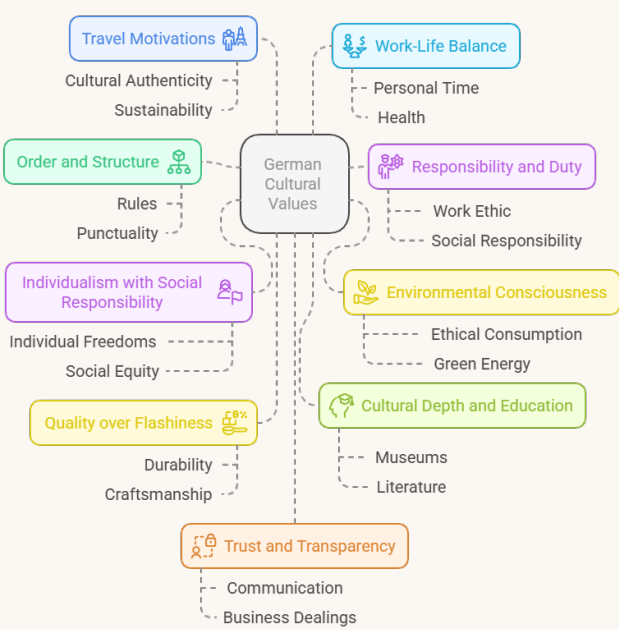
## ENVIRONMENT

Germany has made significant progress in environmental performance, cutting greenhouse gas emissions by around 10% in 2023 - now 46.1% below 1990 levels - largely due to reduced coal use and economic slowdown. While air quality has improved, water pollution and biodiversity loss remain pressing issues. The country is targeting climate neutrality by 2045, with a 65% emissions cut by 2030 under the Climate Change Act. The energy transformation movement (Energiewende) is targeting an 80% renewable electricity by 2030. Opportunities include ramping up renewable deployment, improving efficiency, and scaling nature-based solutions. However, Germany faces hurdles in planning and labour capacity, energy affordability, transport decarbonisation, water and agricultural reform, and balancing competitiveness with sustainability.

## SOCIETY & CULTURE

With a population of approximately 84.4 million, Germany is the EU's largest member nation. Recent population growth is due largely to high net immigration, which has also contributed to increasing societal diversity. Social cohesion is under pressure from economic insecurity, integration challenges, and regional divides. Aging is accelerating; by the mid-2030s, the 67+ age group will rise significantly, while the working-age population contracts. Immigration helps counterbalance demographic decline, but effective integration is essential. Strengths lie in Germany's stable political institutions, skilled workforce, and immigration potential to ease labour shortages. Key challenges include managing aging-related strains on pensions and healthcare, integrating newcomers, reducing regional inequality, and maintaining social unity during major structural shifts.

## VALUES AND MOTIVATIONS



# ABOUT

Destination Queenstown (DQ) and Lake Wānaka Tourism (LWT) are the Regional Tourism Organisations (RTOs) responsible for destination marketing, both domestically and internationally, and destination management, delivering selected initiatives from the Queenstown Lakes' destination management plan.

The RTOs' role is to market Queenstown and Wānaka as leading tourism destinations. This focuses on attracting high contributing visitors and supporting the delivery of the destination management plan to ensure we have a resilient and future focused industry, within a thriving community and environment. DQ and LWT communicate and connect with visitors to generate preference for our region and to create understanding of our place and our values. We help businesses to be resilient and prepared for the future through capability building and we engage with our community and show leadership in caring for our place.

The RTO strategy has evolved to support the goals of Travel to a Thriving Future, as well as continuing to support the visitor economy with values aligned marketing, product development and capability building in line with a regenerative tourism future.

## FOCUS GEOGRAPHIC MARKETS

The RTOs prioritise key geographic markets based on strategic considerations, including aviation connectivity, the likelihood of visitors choosing Queenstown/Wānaka, and alignment with the behaviours of high-contributing visitors. This approach maximises return on investment for members while enabling effective collaboration with partners such as Tourism New Zealand. By aligning with Tourism New Zealand's international marketing efforts, the impact of regional initiatives can be further amplified.

### PRIORITY FOCUS MARKETS

- New Zealand
- Australia
- China
- United States of America

### SECONDARY FOCUS MARKETS

- India
- Southeast Asia (Malaysia, Singapore, Indonesia)
- United Kingdom
- Europe (Germany)

### ADDITIONAL MARKET PRESENCE

- Japan
- South Korea

# SOURCES

## NEW ZEALAND TRAVEL INSIGHTS

International Visitor Arrivals Insights, based on International Visitor Arrivals data (year ended December 2024), accessed via [Infoshare, Stats NZ](#) on 15 March 2025.

New Zealand Trip Insights, based on International Visitor Survey data (year ended December 2024), accessed via [Tourism New Zealand International Visitor Survey Dashboard](#) on 15 March 2025. Time period: 1 January 2024 – 31 December 2024. Sample size: German total respondents (n = 500); German holiday respondents (n = 369)

Intersect of Sustainability and Travel Insights, based on Tourism New Zealand research [The Role of Sustainability in Destination and Operator Choice](#) (December 2023), accessed on 16 March 2025.

## QUEENSTOWN LAKES TRAVEL INSIGHTS

Tourism Related Expenditure Insights, based on Marketview data (year ended December 2024), accessed through Marketview Council Tool on 28 March 2025.

Visitor Experience Insights and Sustainable Travel Attitudes and Behaviours Insights, based on Queenstown Lakes Visitor Experience Survey, Destination Queenstown and Lake Wānaka Tourism, conducted by Angus & Associates. Time period: 1 January 2023 – 31 December 2024. Sample size: total German respondents (n = 37).

## MARKET CONTEXT INSIGHTS

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