



THE GERMAN ECOTOURISM MARKET

This Fact Sheet provides a brief overview of travel behaviour and motivations of the German Ecotourism Market. The information provided here is based on a market research study commissioned by the Destination Australia Market Alliance (DAMA). The study investigated travel behaviour and motivations of long-haul travellers in key international marketsⁱ. The total sample size for Germany was 1012 persons who were interviewed in their home country. Further secondary data analysis of the DAMA research was commissioned by Tourism Queensland to identify and profile tourists specifically interested in Ecotourism experiences.

Ecotourist Definition

For the purpose of this research, an Ecotourist is defined as someone who did at least one of the following activities on their last long haul holiday:ⁱⁱ

- Saw wildlife in its natural surroundings
- Stayed in the wilderness
- Visited a rainforest/ jungle
- Visited national parks

And agreed that they look for at least one of the following activities:

- Environmental/ ecological sites to visit
- See wildlife in natural surroundings
- Walk in untouched countryside and natural environments

And sometimes plan holidays around at least one of the following activities:

- Bird or animal watching
- Camping
- Nature/ ecological/ environmental/ wilderness activities
- Walking/ hiking/ bush walking/ rainforest walking/ rambling
- See wildlife in natural surrounds

Interest in Ecotourism among German Tourists

Using the above definition, 33% of all the German tourists who participated in the original study qualify as Ecotourists.

A very large percentage of German tourists stated they were looking for activities such as “walking in untouched countryside or natural environments” (79%); “seeing wildlife in natural surroundings” (73%) or “visiting environmental/ecological sites” (47%) in a long haul holiday. More than half of the German tourists sometimes plan their holiday around bushwalking-related activities (56%). The following tables show further detail.

Activities participated in on last holiday	
Saw wildlife in its natural surroundings	27%
Visited National Parks	21%
Stayed in the wilderness	11%
Visited a rainforest/jungle	7%

Activities looked for in a long haul holiday	
Walk in untouched countryside and natural environments	79%
See wildlife in natural surroundings	73%
Environmental/ecological sites to visit	47%

Activities that holidays are sometimes planned around	
Walking/Hiking/Bushwalking/Rainforest Walk/Rambling	56%
Nature/ecological/environmental activities/wilderness	31%
Bird or animal watching	24%
Camping	5%

Demographic Profile

Demographic	
Age	Many German Ecotourists are aged between 35 and 44 (25%) with a further 22% aged between 45 and 54 years and another 21% aged between 55-64.
Gender	German Ecotourists tend to be spread evenly across both genders (50% male and 50% females).
Children in household under 18	The majority of German Ecotourists (78%) do not have children under the age of 18 in their household; 15% have only one child.
Household Income	German Ecotourists typically have a monthly household income of more than 1,500 Euro with 25% of German Ecotourists' income between 1,500-2,499 Euro (AUD 2400 - 4000) and 23% with an income of 2,500-3,499 Euro (AUD 4,001– 5,600) ¹ .
Employment status	53% of German Ecotourists are working full time (30 or more hrs per week); another 22% work part-time.
Education Level	The majority of German Ecotourists have at least completed secondary school/O level without diploma (37%) or a university/technical college degree (26%).
Travel Party	In Germany, the majority (44%) of the respondents have travelled with just one person on their previous long haul holiday.
Marital Status	German Ecotourists primarily tend to be married/living as married/living with partner (58%) with 26% single.

¹ Australian dollar conversions made using August 2005 exchange rates.

Travel Planning

Types of accommodation

During their previous long-haul holiday, the vast majority of German Ecotourists stayed in moderate (2-3 star) hotels (38%) or luxury (4-5 star) hotels (26%). Only small numbers stayed at all-inclusive resorts (12%); B&B's/ Guesthouses/ lodges/ farmstays (5%); catered villas/ apartments (6%); backpackers (8%); budget hotels (15%); tents (3%) or camper vans/caravans (9%).

Booking timeframes

Many German Ecotourists started planning their long-haul holidays up to five months (43%) or between six and nine months (39%) prior to departure. 18% started planning one year or more prior to departure.

Organising Previous Holiday

In Germany respondents primarily arranged only the flight/transport before leaving their country. However for approximately one in five trips, a fully escorted tour/package was arranged (22%).

Inspiration and Travel Ideas for Long-Haul Holidays

In Germany, the top five sources of inspiration for travel ideas for Ecotourists are:

1. Friends who have been there (49%)
2. Travel agents (39%)
3. Magazine articles/travel sections (32%)
4. TV travel programmes (24%)
5. Travel books (23%)

Sources of information to research travel destinations

In Germany the top three sources of information used by Ecotourists are Travel agents (52%), travel books or guides (47%), and friends or relatives who have visited the country (44%).

Sources of information to Research Destinations	Percentage
Travel agents	52%
Travel books or guides	47%
Friends or relative who has visited the country	44%
Travel agent/ tour company brochures	44%
Tour operators	44%
Specialist travel magazines	41%
Magazine articles/ travel sections	38%
Look out for things on TV	36%
Newspaper articles/ travel sections	28%
Friends or relative living in the country planning to visit	26%

Media habits

Among the TV programmes viewed by German Ecotourists, Travel & Holiday programs rate fourth (69%) after News (86%), Movies (78%) and documentaries (74%). The favoured magazine read by German Ecotourists is the motoring magazine "ADAC Motorwelt" (39%) which features a strong travel component.

Travel behaviour

Destinations considered and factors influencing choice of destination

For German Ecotourists, the top holiday destination seriously considered is Australia (36%), followed by Canada (25%), Spain (24%), Italy (23%) and New Zealand (23%). For German Ecotourists, the choice of destination largely depends on "the threat of terrorism" (82%); "the political or economic stability of the destination country or region" (80%) and "the potential risk to their health" (79%).

Key Factors Influencing Choice of Destination:



Number and length of last long haul holiday

The majority of German Ecotourists have taken one (38%) or two to three (35%) long haul holidays in the last five years. Of those who have taken at least one long-haul holiday in the past five years, the majority of trips were 15 days to three weeks in duration (39%), followed by 22 days to four weeks in duration (25%).

Motivations of going on long-haul holidays

For German Ecotourists the top three motivations of going on a long-haul holiday are "to see more of the world" (98%), "to experience Indigenous" (95%) and "Native wildlife" (92%).

Motivations of going on long-haul holidays	Percentage
To see more of the world	98%
To experience Indigenous culture	95%
Native wildlife*	92%
To experience a different culture	92%
Walk in untouched countryside and natural environments*	91%
To have fun	90%
To relax and take it easy	90%
To get away from all	90%
Meet the locals	88%
Sunny and warm weather	85%

* Ecotourism defining variable.

Activities that holidays are often planned around

For German Ecotourists the top three activities that holidays are often planned around are “Food and Wine” (85%), “Walking/ hiking/ bush walking/ rainforest walks” (78%), and “Photography” (72%).

Top 10 Activities which holidays are often planned around



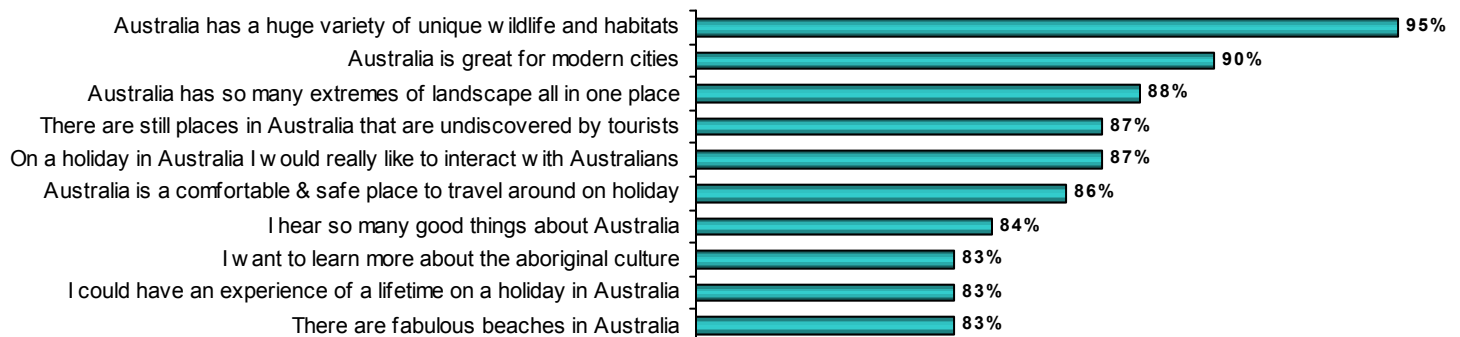
* Ecotourism defining variable.

Travel to Australia

Attitudes of German Ecotourists towards Australia

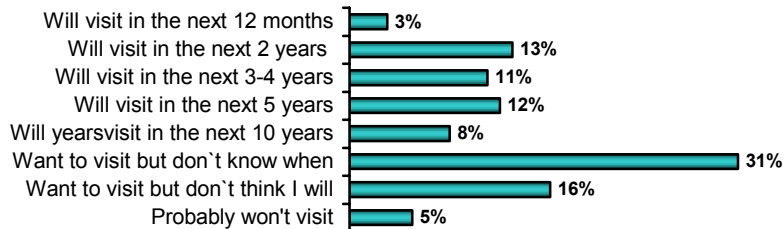
For German Ecotourists the top three attitudes towards Australia as a travel destination are: “Australia has a huge variety of unique wildlife and habitats”(95%); “Australia is great for modern cities”(90%), and “Australia has so many extremes of landscapes all in one place”(88%).

Top 10 Attitudes of German Ecotourists towards Australia



Visiting Australia

The majority of German Ecotourists have never travelled to Australia (84%). A large percentage (31%) want to visit Australia but do not know when, with a further 13% expecting to visit Australia within the next two years. The majority of these prospective visitors intend on staying for more than 21 days (98%).



Amongst those likely to travel to Australia in the next two years, the majority would “visit a couple of regions to get a feel for Australia’s diversity” (54%) or “several different regions to see as much as they can” (36%).

A full report is available on request.

Further Information

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ⁱ For Germany, long-haul holiday destinations as specified in the DAMA questionnaire, are all destinations other than Western and Eastern Europe, but excluding USA – Florida, Egypt, and Morocco

ⁱⁱ Tourism Queensland acknowledges that a universal definition of an Ecotourist does not exist. A limitation of the definition used for the purpose of this analysis is that it is based on the selection of the most appropriate variables from the existing DAMA research.