

Travel Trends



GERMANY



This profile reflects a pre-Covid marketplace and reviews trend data for the German market from 2007 to 2019. The series begins in 2007 to track the recovery from the last recession up to 2019, the last year of complete overseas data.

As an industry, tourism has experienced cycles of downturn and recovery before. While the challenge has never been of this magnitude, the data highlights its resilience and capacity for growth based on past economic shocks.

Understanding travel behaviour in pre-pandemic times will help drive recovery post-Covid.

This travel profile looks at:

1. The trend in German tourist numbers and revenue (tourist figures include all reasons for travel: holidaymakers, visiting friends and relatives, business tourists and others combined).
2. German holidaymakers, as an important subset of tourists, and their characteristics and behaviour in pre-Covid times.

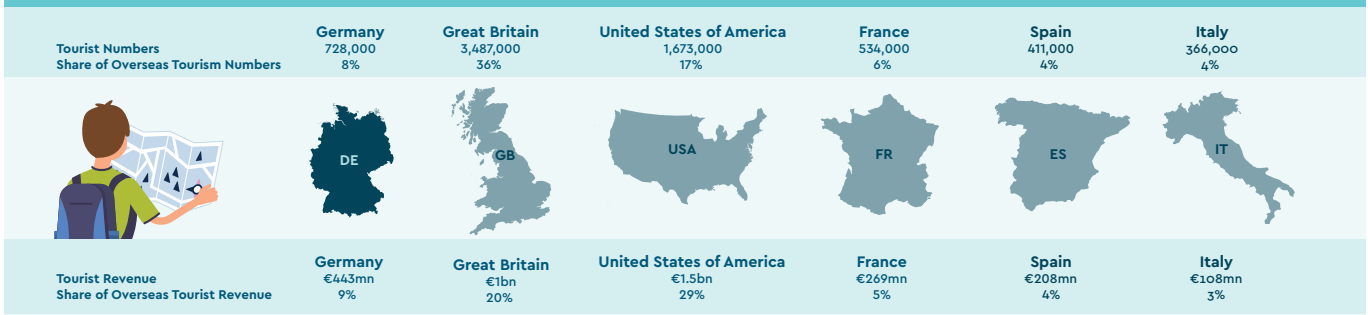
Tourism Numbers and Revenue Trends

Germany is one of the world's largest outbound travel markets and an important source market for Irish tourism. While the trend in tourist numbers to Ireland has been one of relatively consistent

growth (apart from 2019 when Ireland experienced its first decline in nine years), revenue has fluctuated between growth and decline year on year.



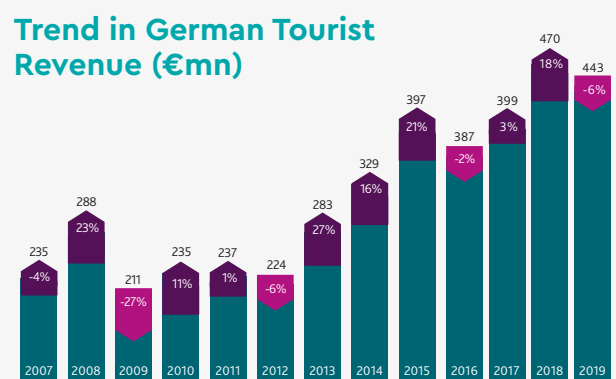
German Share of Overseas Tourists and Revenue (2019)



Trend in German Tourist Numbers (000s)



Trend in German Tourist Revenue (€mn)



Germany consistently holds the third position for both tourist numbers and revenue for overseas markets to Ireland. The growth in revenue has not always mirrored the growth in tourist numbers, however revenue has been growing at a faster rate than tourist numbers (the CAGR¹ for revenue is 5% vs 4% for tourist numbers).

German Tourists

Stay one or more nights (i.e. excluding same day travellers) and can be classified into:



Source: CSO / Fáilte Ireland / NISRA (2007-2019)

1. CAGR is the mean annual growth rate over a specified period of time longer than one year.

GERMAN HOLIDAYMAKER TRENDS

Motivation to Travel² (Pre-Covid)

Ireland's dramatic coastal scenery is a unique selling point (USP) to the German market. Seascapes, which are not available at home, can be a key motivating factor to travel.

In comparison to other key markets, the Germans are more likely to consume the landscape in an active way. However getting out and

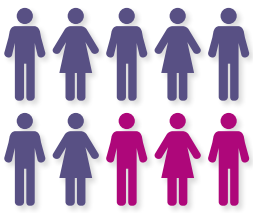
about in Ireland's landscape is by itself not enough, soaking up the atmosphere of an authentic culture is also important.

As with all markets variety is key, a sense of lots to see and do.

Post-Covid Drivers of Destination Choice

Research by Tourism Ireland² in Ireland's key source markets highlights that while Covid safety assurance comes into play for destination choice, **relaxation, variety of attractions and things to do, quality time with loved ones and value for money** are just as, if not more influential when choosing where to go on a short break or holiday.

Repeat Visitors



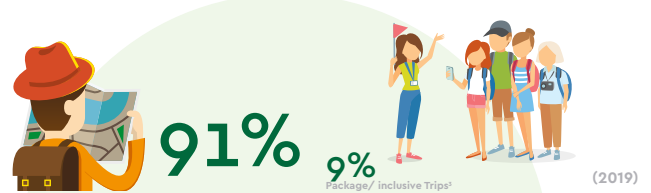
Two thirds (67%) of German holidaymakers are first time visitors to Ireland, a third (33%) returning to Ireland for a repeat visit.

After the British market the Germans are the most likely to return to Ireland. However, the percentage of Germans who return for another visit has been declining (38% in 2007).

(2019)

Travel Arrangements

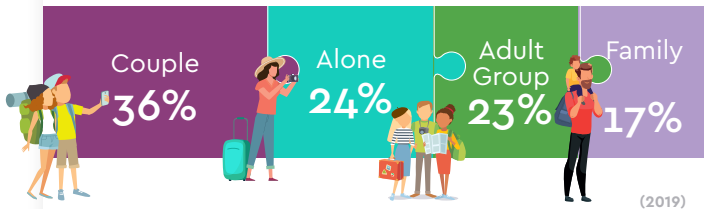
Most German holidaymakers (91%) travel independently to Ireland. The proportion of German holidaymakers travelling on a package tour, like other markets has declined over time (31% in 2007).



(2019)

Holiday Party Type

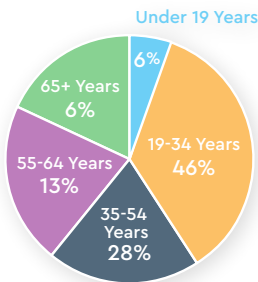
While there has been fluctuations year on year in holiday party composition, reviewing the trend data shows very little change in the holiday group make-up since 2007.



(2019)

More than half (52%) of German holidaymakers are under 35. Since 2007 the proportion of holidaymakers aged 19-34 has doubled (23% in 2007), with the 35-54 and over 65 age groups having declined.

Holidaymaker Age



Length of Stay

1 - 3 Nights	26%
1 - 5 Nights	47%
1 - 8 Nights	71%
9 or more Nights	29%

The French and German holidaymakers are the markets with the highest proportion of holidaymakers who stay 9 or more nights (both at 29%). However the proportion of German holidaymakers who stay 9+ nights has been declining over time (45% in 2007).

(2019)

Travel Routes

German holidaymakers travel to Ireland, as you would expect, predominantly by air (89%) and 11% travel by sea*.

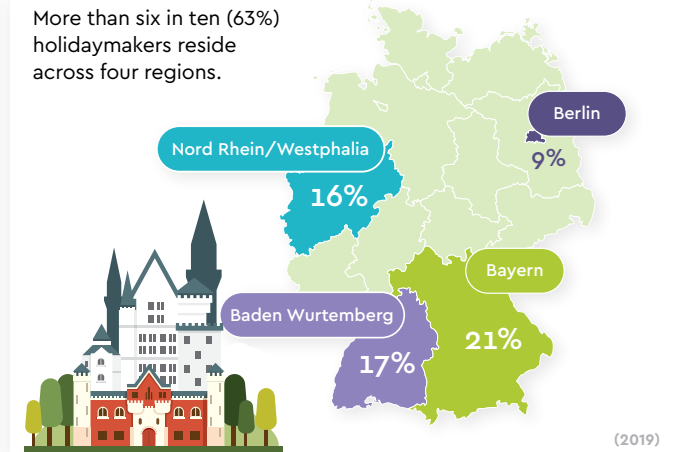


*There is no direct ferry crossing between Germany and Ireland

(2019)

Where Holidaymakers Are From

More than six in ten (63%) holidaymakers reside across four regions.



(2019)

Source: Fáilte Ireland Survey of Overseas Travellers (2007-2019)

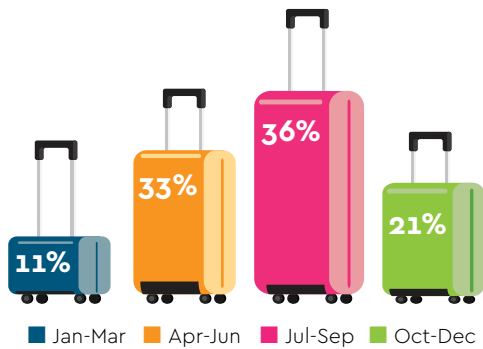
2. Fáilte Ireland Consumer Testing (Innovation Screener (2017)

3. Tourism Ireland Covid Research (June 2021)

4. The fare to/from Ireland and at least one other element (such as accommodation, car hire etc) was paid fully or partly in advance

GERMAN HOLIDAYMAKER TRENDS

When Holidaymakers Travel



■ Jan-Mar ■ Apr-Jun ■ Jul-Sep ■ Oct-Dec

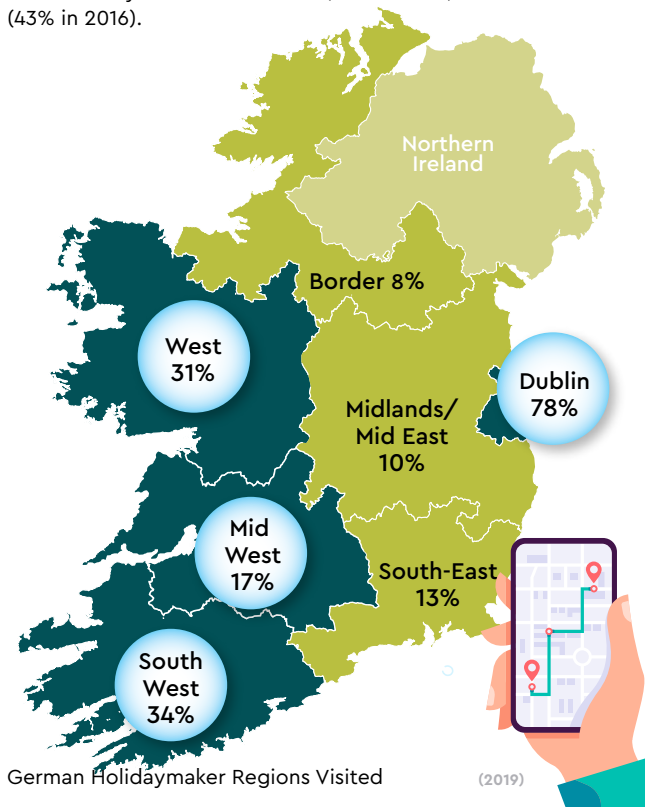
(2019)



Where Holidaymakers Visit

As the primary air access point Dublin is a natural stop for many Germans (78%). While the South-West (34%), the West (31%) and the Mid-West (17%) are also popular destinations.

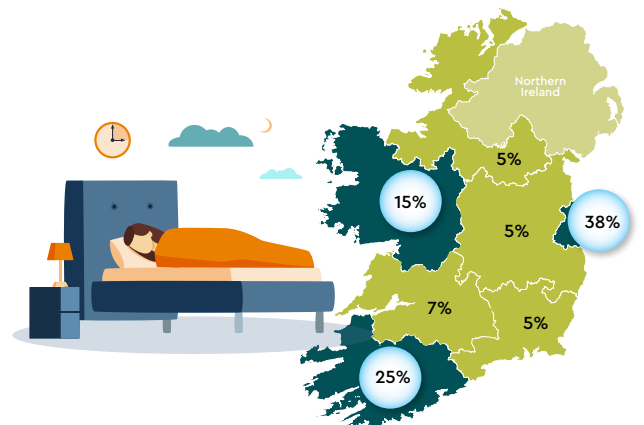
In recent years the average number of regions visited by German holidaymakers has declined, and apart from Dublin, the proportion of visits have declined across all regions, most notably in the South West (48% in 2016) and West (43% in 2016).



German Holidaymaker Regions Visited

(2019)

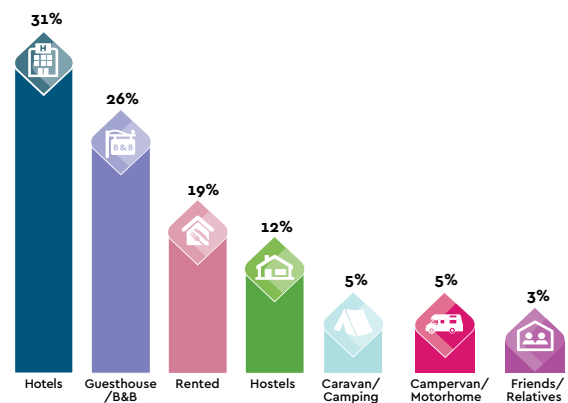
Where Holidaymakers Stay Overnight



German Holidaymaker Nights Spent in Regions

(2019)

Holiday – Accommodation Nights



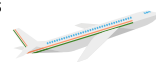
German Holidaymaker Nights spent by Accommodation Type

(2019)

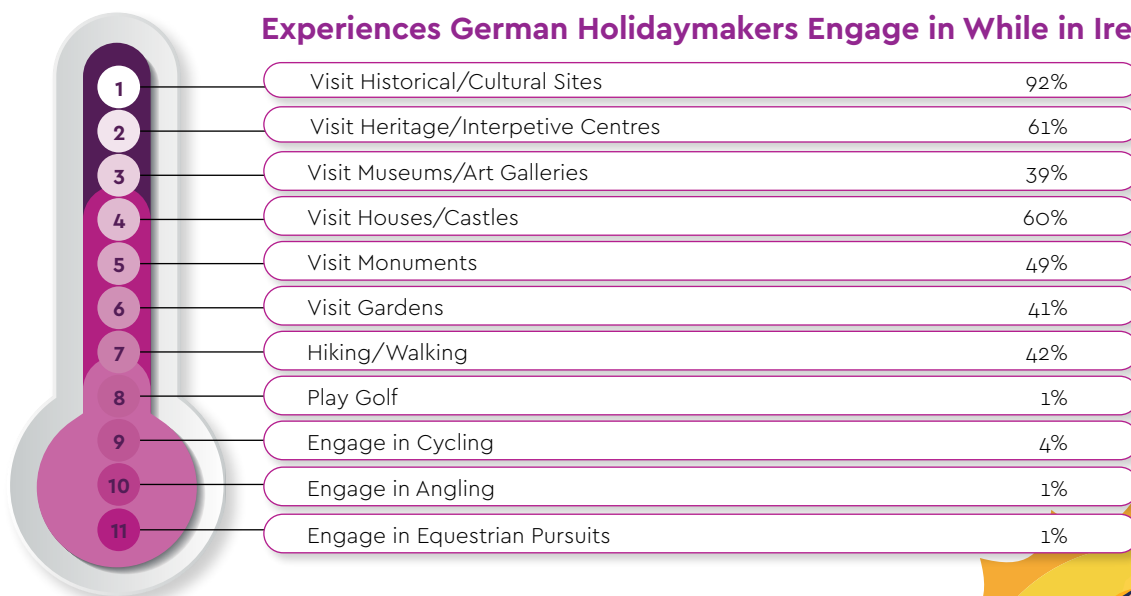
THINGS TO SEE AND DO ON HOLIDAY (PRE-COVID)

- With little coastline of their own, Ireland's coast acts as a motivating reason to travel for the German market who are drawn to the dramatic vistas.
- Mountain views and green landscapes also resonate with this market.

- Germans are active by nature. They like to get out, immerse themselves in nature and sightsee in an active way, while getting under the skin of authentic Ireland is also important.
- The German market is also interested in visiting attractions and like all markets variety is key.



Experiences German Holidaymakers Engage in While in Ireland



Excellent Experience Drives New Business

While German people like to travel, there is strong competition for their consideration amongst cultural tourism destinations.

Importance of Holidaymaker Recommendations and Online Presence⁵

When deciding on where to holiday German holidaymakers rely equally on recommendations from the Internet and friends and family; guidebooks are also a valued source, particularly when in planning mode.

- 49% are influenced by the internet, 47% use family and friends and 28% use guidebooks as an important source of motivational information when choosing a holiday destination.
- 70% German holidaymakers use the Internet, 35% use guidebooks and 32% seek further recommendations from family and friends when planning the detail of their holiday.



How To Ensure The Best Possible Experience?

- While Ireland's scenery is very appealing, enjoying it while being active is particularly important for this market.
- Walking is a key activity, trails and paths with a diverse range of scenery appeals.
- Can we provide our German holidaymakers with recommendations that are not in the guide books?
- Are there opportunities to get by the water and experience the coast from a new perspective?



How to take advantage of Market Opportunities?

1. As recommendations from a trusted source are valued by German holidaymakers, can those who have enjoyed their time in Ireland also become an extension of Ireland's salesforce endorsing Ireland to friends and family on returning home?
2. Rather than providing a passive 'hands-in-pocket-type' experience, investigate how can they explore tourist experiences and Ireland's diverse landscape in a more active way and have your marketing material reflect this way of experiencing Ireland.
3. Position your tourism business alongside all the other great things to see and do in your area, and make your destination stand out for this market.

