TRAVEL PROFILE: Germany

1. Tourist Numbers & Revenue

Germany is one of the world's largest outbound travel markets (ranked 3rd globally after China and US for global outbound travel) and an important source market for Irish Tourism. After double digit growth in 2014 (15%) and 2015 (14%), growth reduced to 2.5% in 2016.

German Tourists
Tourists stay more than one night (i.e. excluding same day travellers) and can be classified into:

- **1 Holidaymakers**: 68%
- **2 Visiting Friends & Relatives (VFR)**: 14%
- **3 Business Tourists**: 14%
- **4 Other**: 4%

This travel profile looks at (1) the overview of tourist numbers and revenue (figures include holidaymakers, visiting friends and relatives, business tourists and others combined), then (2) focuses on the German holidaymaker specifically, and finally (3) looks at what holiday activities and experiences interest potential German holidaymakers to Ireland.

Where Do Ireland's Tourists Come From?

- **Great Britain**: 3,632,000
- **Northern Ireland**: 1,358,000
- **United States of America**: 1,294,000
- **Germany**: 624,000
- **France**: 494,000
- **Spain**: 370,000
- **Italy**: 326,000

Trend in German Tourist Numbers (000s)

<table>
<thead>
<tr>
<th>Year</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>436</td>
</tr>
<tr>
<td>2008</td>
<td>456</td>
</tr>
<tr>
<td>2009</td>
<td>411</td>
</tr>
<tr>
<td>2010</td>
<td>381</td>
</tr>
<tr>
<td>2011</td>
<td>411</td>
</tr>
<tr>
<td>2012</td>
<td>437</td>
</tr>
<tr>
<td>2013</td>
<td>466</td>
</tr>
<tr>
<td>2014</td>
<td>535</td>
</tr>
<tr>
<td>2015</td>
<td>609</td>
</tr>
<tr>
<td>2016</td>
<td>624</td>
</tr>
</tbody>
</table>

Germany consistently holds the third position for both tourist numbers and revenue for overseas markets to Ireland.

Revenue (€m)

While German tourist numbers grew by 2.5% in 2016, revenue declined by the same margin (-2.4%), possibly impacted by a reduction in length of stay.
2. German Holidaymaker Profile

68% of German tourists cite holiday as the main purpose of visit to Ireland.

German holidaymakers are young; 52% are under 34 years of age and they prefer to use serviced accommodation while in Ireland, split between hotels (45%) and Guesthouse and B&Bs (44%). Nearly a third (31%) will stay more than 9 nights.

Germans want to actively enjoy Ireland’s scenery. They are particularly attracted to Ireland’s coast, and enjoy getting under the skin of the real Ireland and interacting with locals.

Profile of German Holidaymakers

Nearly seven in ten (68%) German holidaymakers are first time visitors to Ireland, with three in ten (32%) returning to Ireland for a repeat visit. German holidaymakers are the third most likely market to return to Ireland for a repeat visit, after GB and France (France is nearly four in ten for return visits).

Travel Arrangements

Most German holidaymakers travel independently to Ireland. Nearly two in ten (19%) arrive on a package holiday - where the fare to/from Ireland and at least one other element (such as accommodation, car hire etc) was paid fully or partly in advance.

Holiday Party Type

The proportion of Germans travelling with families grew by 6 percentage points between 2012 and 2016, with a corresponding drop in solo travellers.

1 Couple 43%
2 Adult Group 22%
3 Alone 18%
4 Family 18%

Over two thirds (68%) of German holidaymakers stay in Ireland for over 5 nights.

Age (2016)

<table>
<thead>
<tr>
<th>Age</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 19 Years</td>
<td>7%</td>
</tr>
<tr>
<td>19 - 34 Years</td>
<td>45%</td>
</tr>
<tr>
<td>35 - 54 years</td>
<td>30%</td>
</tr>
<tr>
<td>55 - 64 years</td>
<td>14%</td>
</tr>
<tr>
<td>65+ years</td>
<td>4%</td>
</tr>
</tbody>
</table>

Length of Stay (2016)

<table>
<thead>
<tr>
<th>Length of Stay</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - 3 Nights</td>
<td>15%</td>
</tr>
<tr>
<td>1 - 5 Nights</td>
<td>32%</td>
</tr>
<tr>
<td>1 - 8 Nights</td>
<td>69%</td>
</tr>
<tr>
<td>9 or more nights</td>
<td>31%</td>
</tr>
</tbody>
</table>

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

Where Are They From?

Nearly two thirds of German holidaymakers (64%) come from South or West Germany.

Region of Residence (2016)

- Nord Rhein/Westphalia 18%
- Hessen 15%
- Bayern 21%
- Baden Wurtemberg 15%

Sources

Fáilte Ireland Survey of Overseas Travellers 2016
Fáilte Ireland Holiday Behaviour Deepdive 2016
2. German Holidaymaker Profile

**When Do They Travel?**

- 2016:
  - Q1 Jan-Mar: 10%
  - Q2 Apr-Jun: 32%
  - Q3 Jul-Sept: 45%
  - Q4 Oct-Dec: 13%

**Where Do They Go?**

- As the primary air access point Dublin is a natural first stop for many Germans on arrival (73%). While the South-West (48%), the West (43%) and the Mid-West (27%) are also very popular destinations.

**Where Do They Stay?**

**Holiday - Accommodation Used (%):**

- Hotels: 45%
- Guesthouse/B&B: 44%
- Rented: 11%
- Hostels: 17%
- Friends/Relatives: 5%
- Caravan/Camping: 4%
What Types Of Holiday Are Germans Looking For?

Germans would definitely consider visiting Ireland for city breaks and see it as a place for touring and adventure holidays - in line with the holiday pattern for this market generally. Therefore Ireland is well positioned as a potential destination for the German market.

Germans would definitely consider taking this type of holiday in Ireland in the next three years

What Activities Do Germans Typically Do On Holiday?

- Getting active in nature is important for the Germans. Rather than passive appreciation of scenery they prefer more energetic sightseeing
- Easy walking and hiking along with easy cycling are key activities for the German market
- Exploring dramatic landscapes are important for them and so national parks/nature reserves and getting on the water where possible appeals to this market
- Activities that Germans typically participate in on holiday abroad match what they would see themselves doing if holidaying in Ireland

Type of holiday activities Germans would consider doing on holiday in Ireland?

1st: Visit a nature reserve/national park
2nd: Walking (typically up to 5km/3 miles per walk)
3rd: Boat trips
4th: Cycling (typically up to 20km/12 miles per cycle)
5th: Any watersports
6th: Hiking/cross-country walking (more than 5km/3 miles per walk)
3. German Holiday Travel Choices

Things To See And Do On Holiday

- Germans are attracted to Ireland’s unique coastal seascapes. Getting on the water for a new perspective is appealing.
- They are looking to actively enjoy Ireland’s scenery, while getting under the skin of authentic Ireland.

<table>
<thead>
<tr>
<th>Experiences interested in doing in Ireland</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Take a trip to the rugged, remote Islands off the coast</td>
<td>51%</td>
</tr>
<tr>
<td>2 Spend an afternoon exploring/strolling around a picturesque town</td>
<td>50%</td>
</tr>
<tr>
<td>3 Go whale and dolphin watching off the west coast</td>
<td>49%</td>
</tr>
<tr>
<td>4 Explore spectacular scenery by bike or on foot</td>
<td>48%</td>
</tr>
<tr>
<td>5 Walk along some of the highest sea cliffs in Europe</td>
<td>48%</td>
</tr>
<tr>
<td>6 Listen to live traditional music in a local pub</td>
<td>47%</td>
</tr>
<tr>
<td>7 Experience sight and sounds of modern Ireland that’s not in the guide books</td>
<td>47%</td>
</tr>
<tr>
<td>8 Sit outside a pub/cafe and people watch</td>
<td>46%</td>
</tr>
<tr>
<td>9 Driving tour visiting a number if historical sites</td>
<td>44%</td>
</tr>
<tr>
<td>10 Take a boat tour around Ireland’s coastal villages</td>
<td>43%</td>
</tr>
<tr>
<td>11 Learn about Ireland’s whiskey and beer making traditions on a brewery/distillery tour</td>
<td>43%</td>
</tr>
</tbody>
</table>

Enhancing The Holiday Experience

While German people like to travel, there is strong competition for their consideration amongst cultural tourism destinations. Germans are interested in a holistic holiday. Against a backdrop of remarkable scenery they would like to engage with Ireland’s culture while learning about the past that shaped who we are.

How Can We Ensure They Have The Best Possible Experience?

- While Ireland’s scenery is very appealing, enjoying it while being active is particularly important for this market.
- Walking, hiking and easy cycling are key activities for Germans.
- Germans are attracted to nature reserves and national parks, it’s something they do while abroad and so would seek out in Ireland also.
- Can we provide our German holidaymakers with recommendations on contemporary Ireland that are not in the guide books – modern hidden gems?
- Are there opportunities to get on the water and experience the coast from a new perspective?
- Having the history and story of an attraction or location brought to life by a guide in character very much appeals to this market.