

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

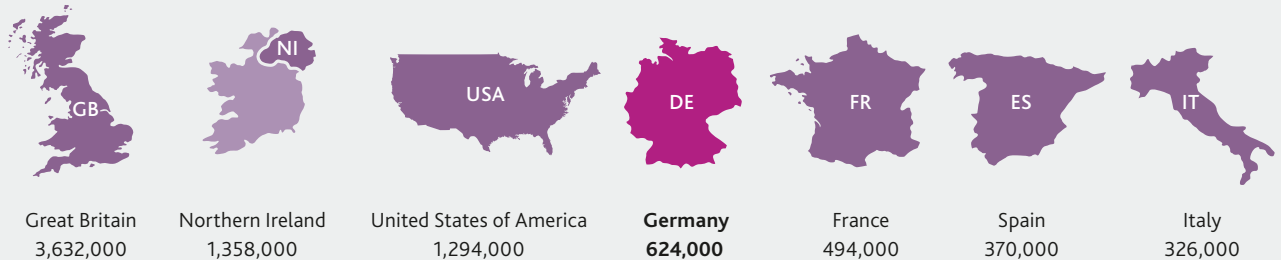
Tourists stay one or more nights (i.e. excluding same day travellers) and can be classified into:

Main purpose of visit

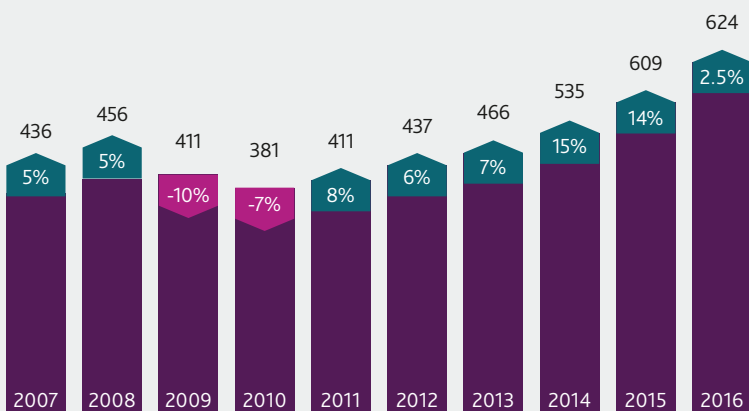


This travel profile looks at (1) the overview of tourist numbers and revenue (figures include holidaymakers, visiting friends and relatives, business tourists and others combined), then (2) focuses on the German holidaymaker specifically, and finally (3) looks at what holiday activities and experiences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

Where Do Ireland's Tourists Come From?

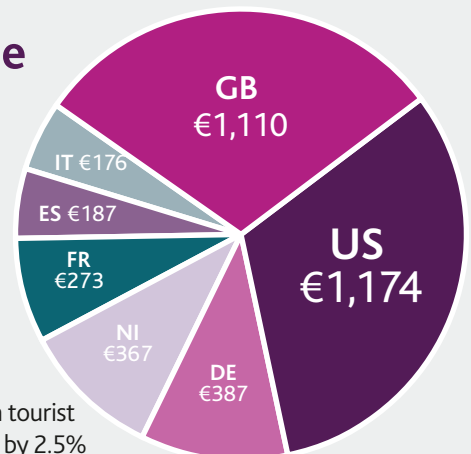


Trend in German Tourist Numbers (000s)



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.



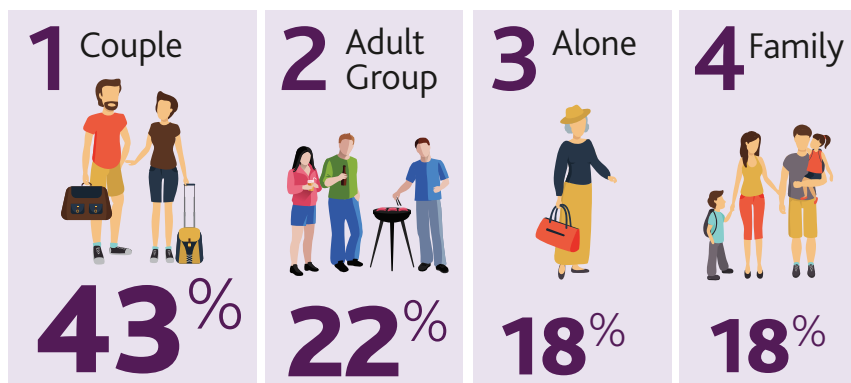
81%



19%

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.



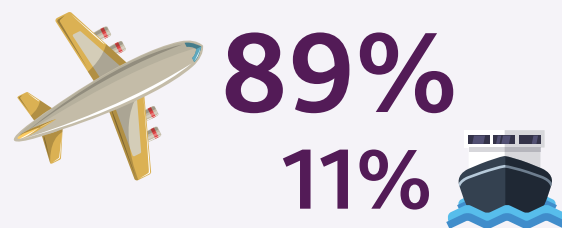
Over two thirds (68%) of German holidaymakers stay in Ireland for over 5 nights.

Age (2016)		Length of Stay (2016)	
Under 19 Years	7%	1 - 3 Nights	15%
19 - 34 Years	45%	1 - 5 Nights	32%
35 - 54 years	30%	1 - 8 Nights	69%
55 - 64 years	14%	9 or more nights	31%
65+ years	4%		

Travel Routes

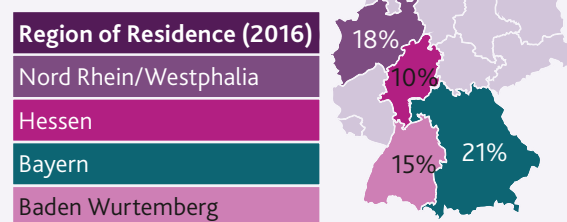
German holidaymakers travel to Ireland, as you would expect, predominantly by air (89%) and 11% travel by sea*.

*There is no direct ferry crossing between Germany and Ireland



Where Are They From?

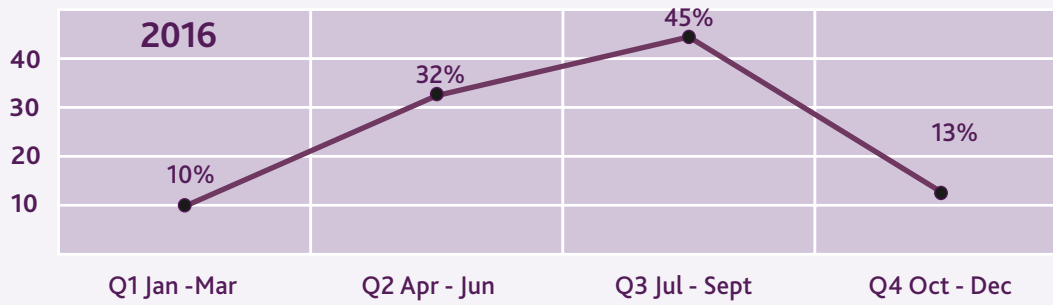
Nearly two thirds of German holidaymakers (64%) come from South or West Germany.



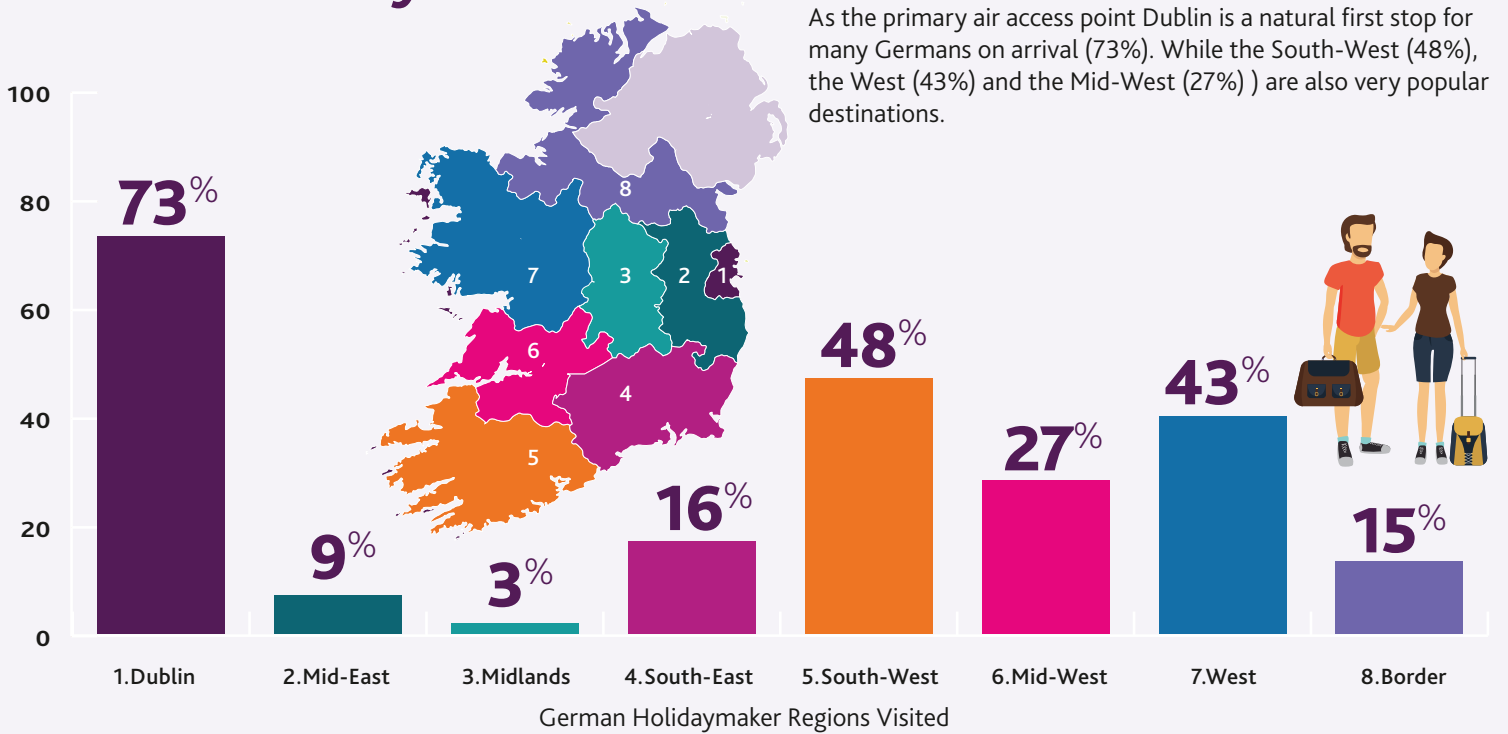
2. German Holidaymaker Profile



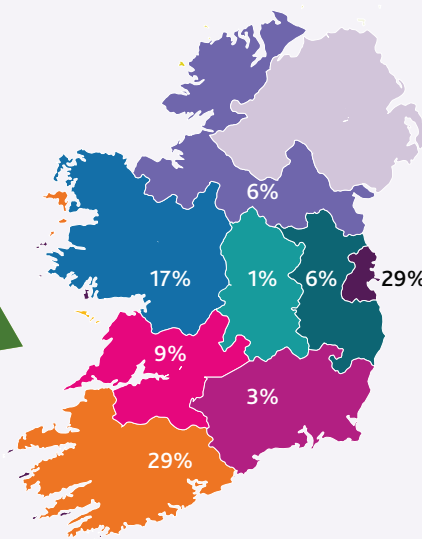
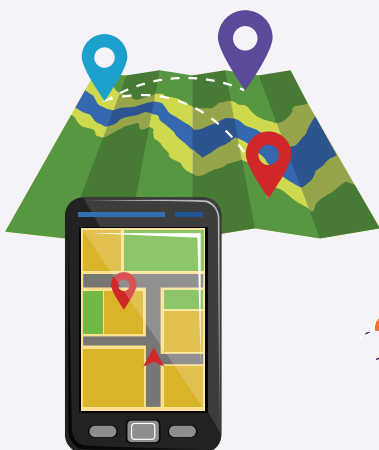
When Do They Travel?



Where Do They Go?

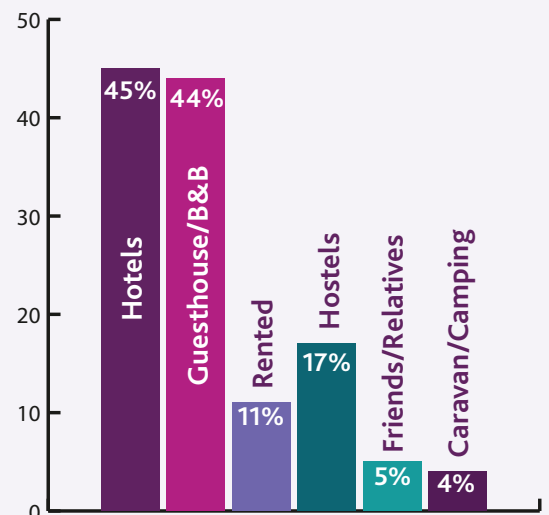


Where Do They Stay?



German Holidaymaker Nights Spent in Regions

Holiday - Accommodation Used (%)



3. German Holiday Travel Choices

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.



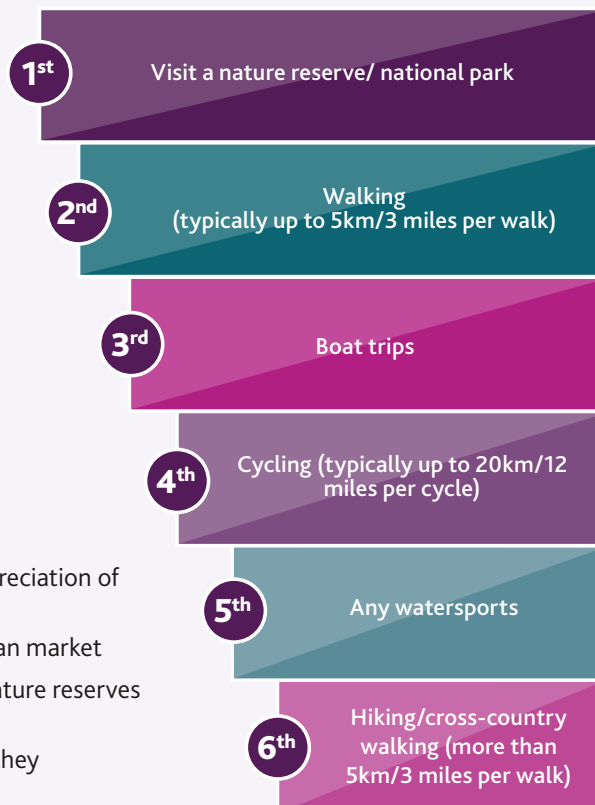
Germans would definitely consider taking this type of holiday in Ireland in the next three years



What Activities Do Germans Typically Do On Holiday?



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



- ▶ 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

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

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



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

