



# The German Market Profile 2007

## Marketing Insights



### The Size and Value of the German Market

Following on from extremely strong growth in 2005 (+34%) the German market to the island of Ireland continued to grow in 2006, although at a more modest rate (+3%). Revenue also grew at +3%. Both holiday visits and promotables also experienced strong growth levels in 2005, which were not sustainable in 2006.

German trips to the island of Ireland								
	2000	2001	2002	2003	2004	2005	2006	06/05 % Change
Total Visits (000s)	338	302	304	314	312	417	432	+3%
Holiday Visits (000s)	219	193	198	183	187	266	259	-3%
Promotable Visits (000s)*	230	199	203	200	192	270	264	-2%
Revenue (€M)	179	203	190	191	182	246	254	+3%
Revenue (£M)	124	140	131	132	126	170	175	+3%
All German outbound** trips								
Total Visitors (000's)	79,359	76,087	74,963	72,666	73,777	76,355	74,506	-3%
Holiday Visitors (000's)	61,966	57,900	54,418	49,851	51,447	54,356	52,457	-4%

In 2006 the German outbound market, which is the largest outbound travel market in the world, slowed down. The downturn can be attributed in part to an increase in domestic tourism as a result of the FIFA world cup which was held in Germany in 2006. Total outbound visits decreased by -2.5% while holiday visits decreased by -3.5%. The market is expected to return to growth and to reach 86.5 million trips by 2010.

\*Promotable visits include holidaymakers, conference and incentive visitors and those who come to study English as a foreign language (EFL).  
\*\*Outbound trips are trips taken by German residents to any destinations outside Germany.  
Exchange rate used to convert Euro to Sterling is 1 Euro = 0.69 Sterling

#### CONTENTS

##### Size & value of German travel market

##### The German travel market

- Why they travel
- Where they go on holiday
- Length of stay
- Key facts

##### The German market to the Island of Ireland

- Why they come
- How long they stay
- Where they go
- Key facts

##### Sources of information/ inspiration

##### Download full German report

[www.tourismireland.com/corporate](http://www.tourismireland.com/corporate)

Germany is the **third largest** tourism generating market to the island of Ireland & in 2006 it accounted for 5% of total visits & 7% of promotable and holiday visits to the island.

In 2006 German visitors spent almost **4 million nights** on the island, an increase of +10% over 2005, indicating an **increase in length of stay.**

The German **economy** has been **improving** since early 2006, which may lead to a rebound in the outbound travel market in 2007.



# The German Travel Market

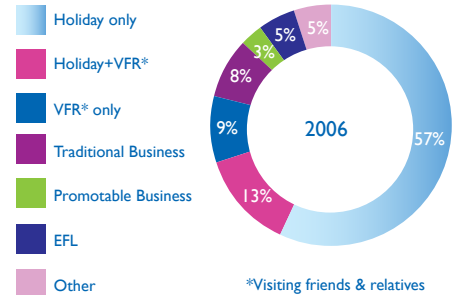
## Profile of German travellers abroad



- **Less than 6%** of German outbound holiday trips are to **destinations outside Europe** - a lower than average share compared to European markets generally.
- In 2006 62% of outbound short breaks and 28% of outbound holidays were **taken by car** while just 14% of outbound short breaks and 57% of outbound holidays were **taken by plane**.
- **61% (over 50 million)** of the German population are online and they rank 4th in the world for online use behind USA, China and Japan. In 2006 **51% of those who went on holidays abroad used the Internet** to find information on their holiday destination.
- **4 in 10** of German outbound holidaymakers are **over the age of 50**.
- **Familiarity with destinations** is important to German outbound holidaymakers. In 2006 55% of main holidays were to destinations that had been previously visited and 68% of additional holidays were to familiar destinations.

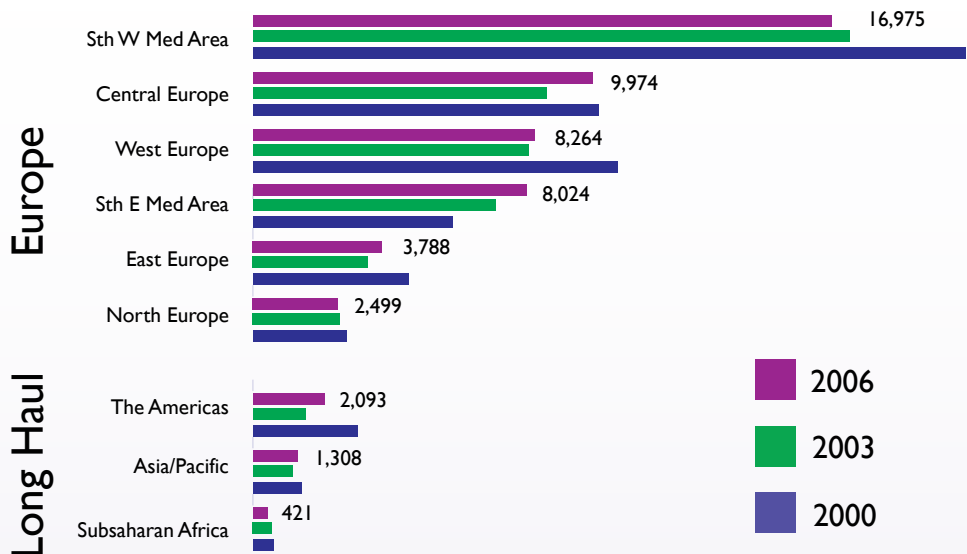
## Why the Germans travel overseas

The majority of German outbound trips are for a holiday (57%) with a further 13% combining some VFR with their holiday. Just 9% are for pure VFR and 11% of all trips are for business (8% traditional business and 3% promotable business).



## Where the Germans go on holidays

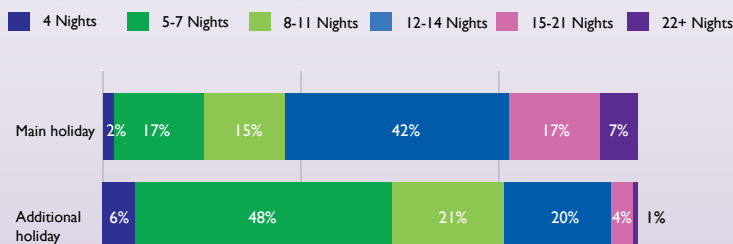
Over the last few years the number of German holidaymakers visiting the traditional South West Mediterranean destinations has been in decline – although it is still their most popular region. Western Europe is also losing out, while Central Europe and the South East Med are growing in popularity.



The most popular countries for holidays by German holidaymakers are Spain (17%), Austria (15%), Italy (13%) and France (7%).

## How long Germans stay on holidays abroad (4+ nights)

The average length of stay for German outbound holidaymakers is much longer for their main holiday (14.7 nights) than any additional holidays (9.9 nights). Over 50% of additional holidays are for 4 to 7 nights compared to 19% for main holidays. Short breaks (1-3 nights) are also popular, with 14.6 million taken in 2006.



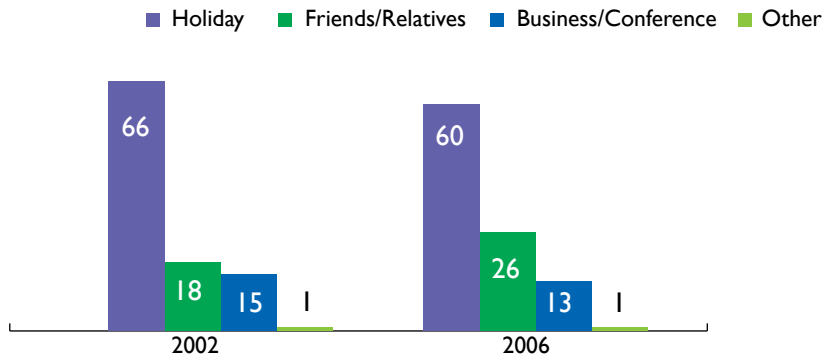
(1-3 night short breaks are not included)

Germans, like a lot of Europeans have a large number of standard annual leave days (30 on average). This impacts greatly on their holiday taking patterns, enabling them to take 2-3 weeks holiday at a time and still have more days for additional holidays or short breaks. In addition to standard leave, Germans are also entitled to one week of "Bildungsurlaub" or self improvement holiday and the practice of taking this is very common.

# The German Market to the island of Ireland

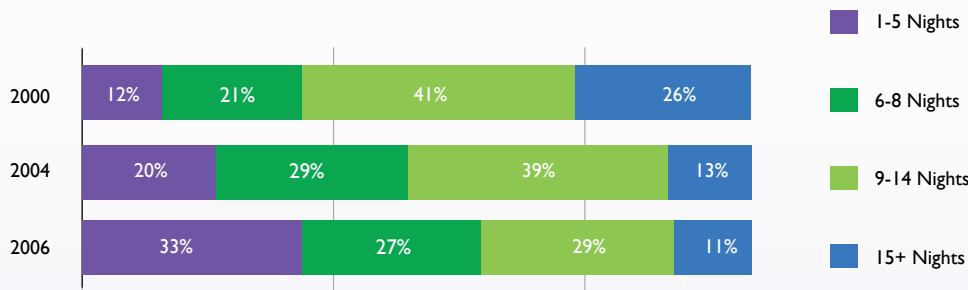
## Why the Germans come to the island of Ireland

Holiday accounts for almost two thirds of German visits to the island of Ireland. However, VFR has been growing steadily, and accounted for one quarter of visits in 2006. During the same period the proportion of both holiday and Business/Conference declined.



## How long they stay

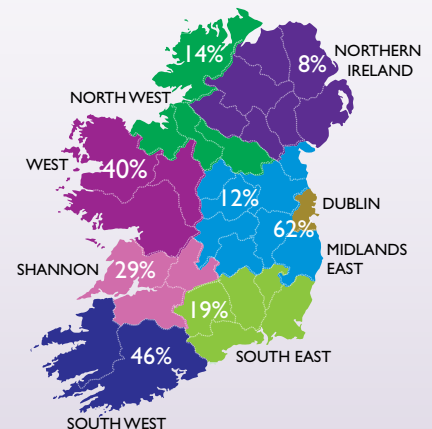
Encouraged by increases in low fare access, the trend towards shorter holidays continues, with 33% of German holidaymakers staying 1-5 nights on the island in 2006. Holidays of 9 or more nights have declined from 67% of German holidays in 2000 to just 40% in 2006. Average length of stay is now 8.8 nights.



## Where they go on the island of Ireland

62% of German holidaymakers visited the Dublin area in 2006. The South West and the West were the next most popular areas. There has been an increase in holidaymakers including Northern Ireland in their itinerary in recent years. Summer 2006 saw a strong increase in access to Belfast from Germany which may have impacted on this trend.

Holiday-Areas Visited (%)	2001		2006	
	(000s)	%	(000s)	%
Dublin	86	45	161	62
Midlands/East	31	16	32	12
South East	36	19	50	19
South West	100	52	120	46
Shannon	75	39	76	29
West	84	44	104	40
North West	27	14	36	14
Northern Ireland	7	4	20	8



## Profile of German holidaymakers to the island of Ireland

- **July** is the most popular month of arrival for German holidaymakers, followed by **June and August**
- **First-time visitors** accounted for **64%** of holiday visits in 2006, while 36% were repeat visits.
- **82%** of German Holidaymakers took part in **Historical and Cultural activities in 2006**. Almost 80% said they were motivated to visit the island of Ireland to explore sights and find out about its culture.
- **Guesthouses and B&Bs** account for **almost a third** of all accommodation used by Germans on the island while Hotels account for almost a fifth.
- **Nord Rhein/Westphalia** is the region in Germany that generates most holiday visits to the island of Ireland.





## Sources of information / inspiration

Advice from friends and family (45%) is the most important influence for Germans choosing to holiday on the island of Ireland, while the Internet (58%) and Guidebooks (53%) are most popular at the planning stage.



**The full German report contains over 100 pages of invaluable information.** Everything you need to know about German visitors to the island of Ireland and how to avail of promotional opportunities **with Tourism Ireland in the market place.**

**Contents of the full French report can be downloaded at [www.tourismireland.com/corporate](http://www.tourismireland.com/corporate)**

### Country Profile:

Background information on the country.



### German travel profile:

Statistical information illustrated by charts including size of market and profile of general outbound holidaymaker.



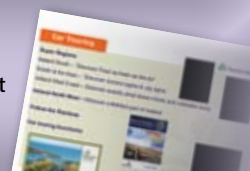
### The German market to the island of Ireland:

Detailed breakdown including market size and a profile of the motivations and attitudes of holidaymakers visiting the island.



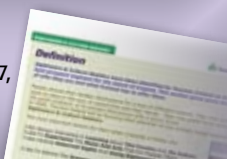
### Car touring to the island of Ireland:

A brief synopsis of the car touring market to the island of Ireland in general (not only German visitors).



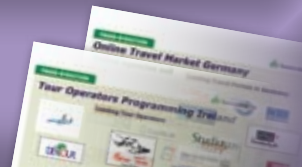
### Sightseers and Culture Seekers:

Tourism Ireland's key target segment in 2007, this section gives an overview of who they are and what messages motivate them.



### Trade Structure:

How the trade operate on our behalf in the market place.



### Tourism Ireland Activities:

Lists advertising and promotional activity in the market along with cooperative opportunities.



### Tourism Ireland Contacts:

Details of who's who in the German office.



**Market Profiles are also available for Great Britain, USA, France, the Netherlands, Italy, Canada, Australia, Spain and the Nordics**



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