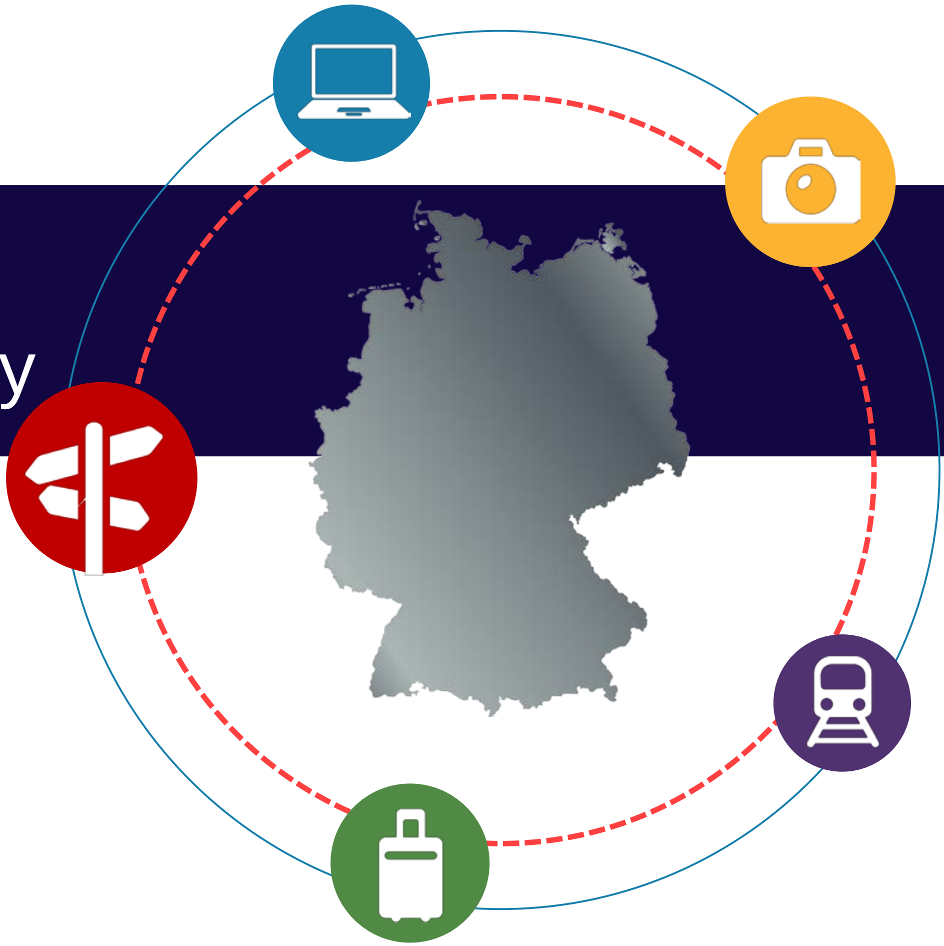
Market and Trade Profile: Germany



Germany

Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about German travellers and who they are. It takes a look at Britain and its competitive set as well as activities of German visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at German consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by Germans are also highlighted.
- **Chapter 3: Access and travel trade** shows how Germans travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the German travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.

Contents

Chapter 1:

Inbound market statistics

Chapter 1: Inbound market statistics

2016: £1.5bn spend in UK

Chapter summary

- The German outbound market is forecasted to exceed 113 million trips abroad with at least one overnight stay by 2020. Compared to all other countries, Germans took the second most outbound trips in 2016 – only US travellers took more.
- Germans rank globally in 3rd place for international tourism expenditure, following Chinese and US travellers, with more than US$81.1bn in 2016.
- Germany was the 3rd most important inbound source market for the UK for volume and 2nd for spend in 2016.
- Ireland was the most considered competitor destination by German visitors, followed by France and Spain.
- The German source market has an above-average regional spread with very good growth potential for the years to come.
- 92% of departing Germans are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO, FUR Reiseanalyse 2016, VisitBritain/IPSOS 2016, CAA 2016

Chapter 1.1: Key statistics

Key insights

- Germany is Britain's 3rd most important source market in terms of visits and 2nd most important for visitor spending.
- 52% of spending came from holiday trips in 2016.
- In 2016 the number of business trips remained more than 300,000 lower than it was at its record-level in 2006.
- London is the leading destination for a trip to Britain but South East, Scotland and South West are also popular.
- Holiday visits from Germany have an above average propensity to feature rural and coastal areas of Britain.
- The most popular activities undertaken by German travellers in Britain include sightseeing of famous buildings/monuments; in particular, castles, visiting parks/gardens and shopping.
- One-in-five holiday visits from Germany were bought as part of a package or all-inclusive tour in 2016.

Globally, Germans took second most outbound trips (2016)

Source: International Passenger Survey by ONS

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US$bn)	81.1
Global rank for international tourism expenditure	3
Number of outbound overnight visits (m)	100.5
Most visited destination	Austria

Inbound travel to Britain overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	3,376	19,280	1,206
2008	2,900	17,374	1,125
2009	2,780	17,300	1,167
2010	3,004	18,143	1,193
2011	2,947	18,822	1,252
2012	2,967	16,306	1,223
2013	3,048	18,113	1,358
2014	3,220	19,523	1,478
2015	3,249	18,742	1,378
2016	3,341	19,273	1,490
Share of UK total in 2016	8.9%	7.0%	6.6%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	3,341	3%	3
Nights (000s)	19,273	3%	3
Spend (£m)	1,490	8%	2

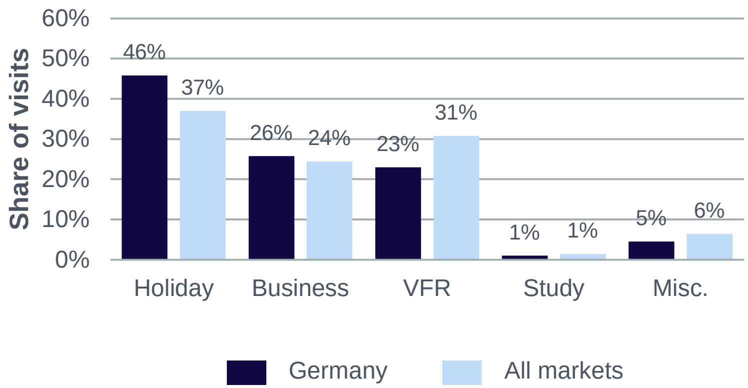
Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	6	£87	£509
Business	3	£126	£415
Visiting Friends/ Relatives	6	£45	£279
Study	58	£38	£2,227
All visits	6	£77	£446

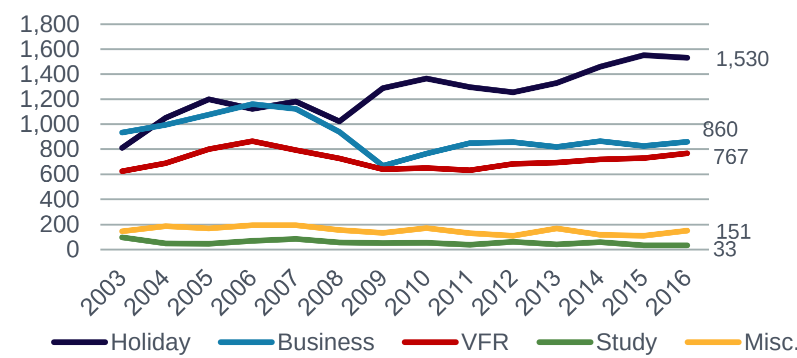
Source: International Passenger Survey by ONS

1.1 Key statistics: journey purpose

Journey purpose 2016



Journey purpose trend (visits 000s)



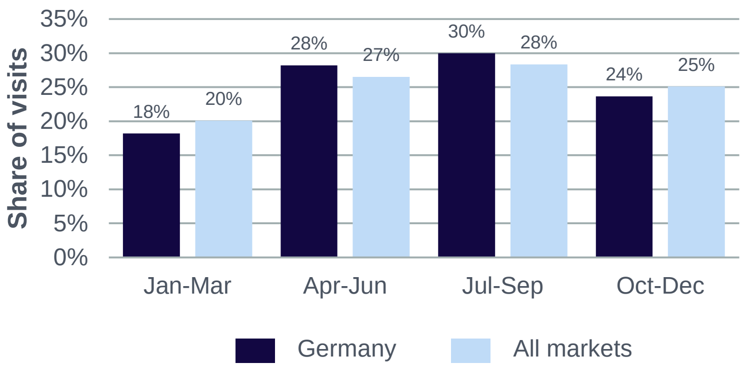
- 46% of all visits to the UK from Germany were made for holiday purposes, followed by 26% of visits for business purposes in 2016.
- 62% of holiday visits from Germany to the UK were made by repeat visitors (excl. UK nationals). These repeat visitors came on average between two and three times in the past ten years (a medium average visit frequency compared to other markets) and spent £1,379 in the UK in the past ten years.

- Holiday visits continue to lead growth in the German market. 52% of spending comes courtesy of Holiday trips in 2016.
- In 2016 the number of business trips remained more than 300,000 lower than it was at its record-level in 2006 prior to the financial crisis.
- The highest proportion of repeat visitors (excl. UK nationals) were among those coming for business purposes (92%) or to visit friends or relatives who live in the UK (88%).

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015

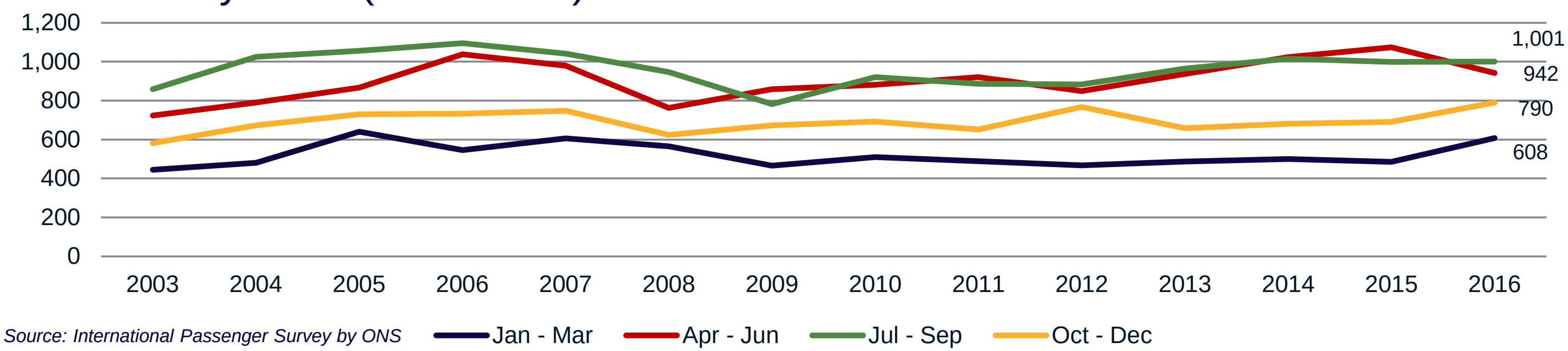
1.1 Key statistics: seasonality

Seasonality 2016



- 28% and 30% of visits from Germany to the UK were made in the second and third quarter respectively accounting for more than half of German visits in 2016.
- The importance of the spring and summer quarters is reflected in the below graph showing the high volume of visits from Germany to the UK during this time period. The first and last quarter of the year have seen the volume of visits from Germany increase in 2016.

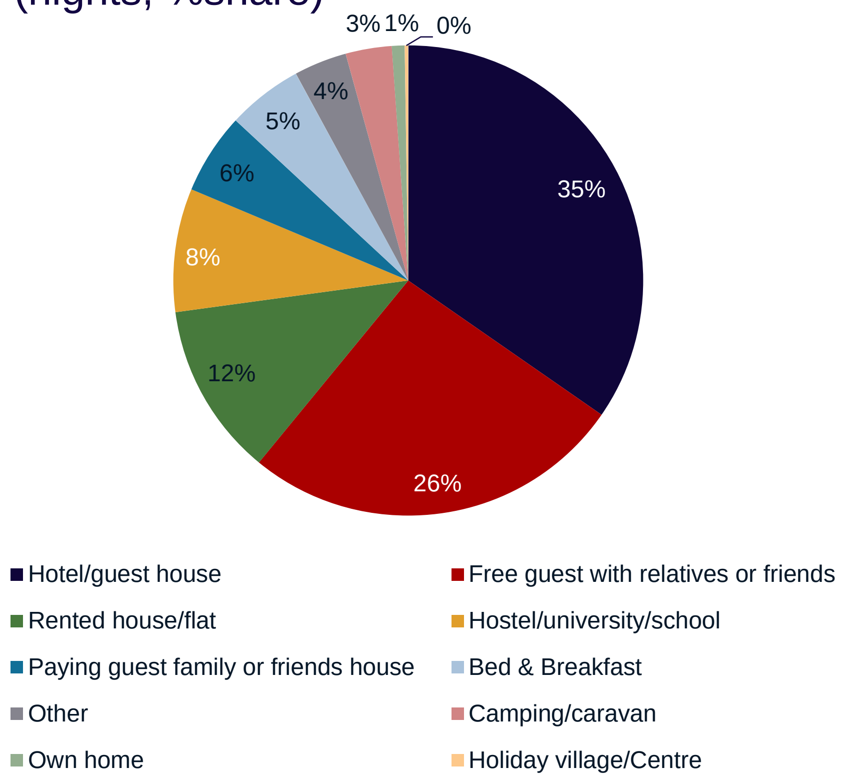
Seasonality trend (visits 000s)



Source: International Passenger Survey by ONS

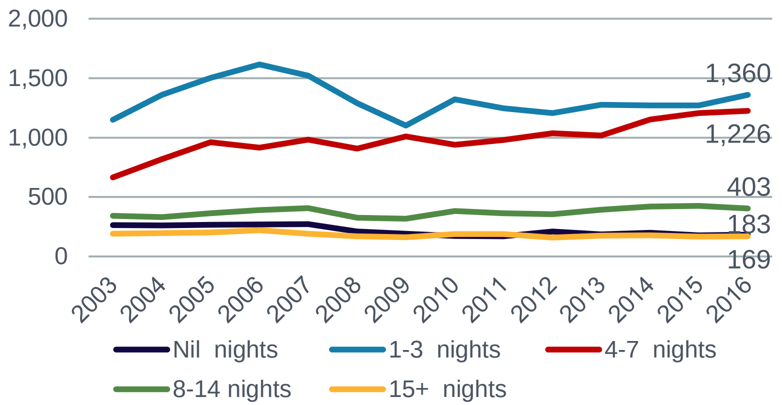
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2016 (nights, %share)



Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay from Germans.
- Two forms of accommodation dominate the picture with 'hotel/guest house' being the most popular thanks to a large volume of holiday and business visitor nights. 26% of nights are spent with 'Friends or relatives' (free or paid for) with the majority of these being by those on a VFR trip. Rented houses or flats are also popular making up 12% in 2016.

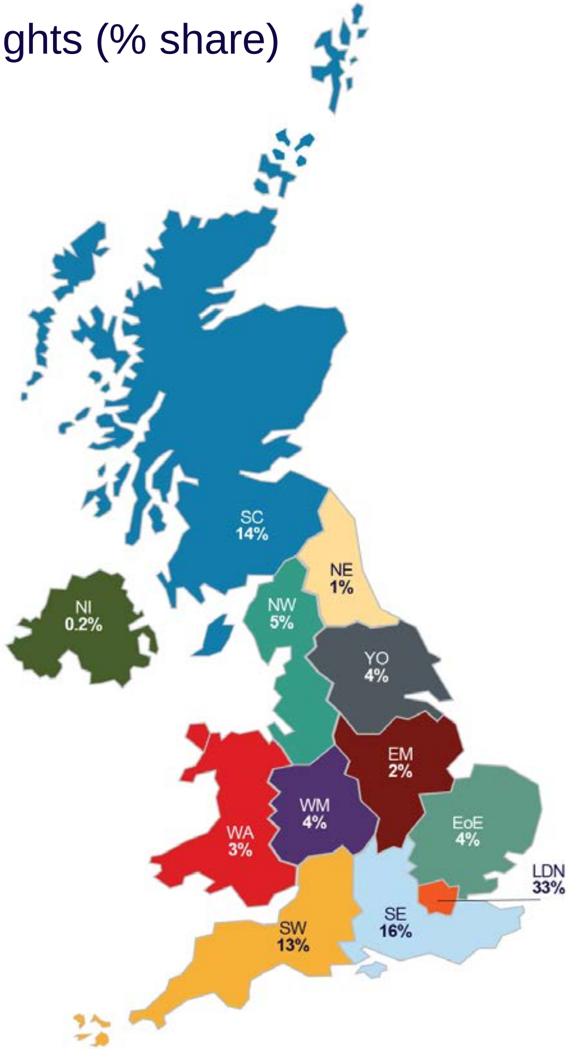
1.1 Key statistics: regional spread

Visits to the UK (2016)

Region	Nights stayed (000)	Visits (000)
Total	19,273	3,341
Scotland (SC)	2,725	355
Wales (WA)	569	94
Northern Ireland (NI)	42	12
London (LDN)	6,333	1,473
North East (NE)	209	49
North West (NW)	980	210
Yorkshire (YO)	837	113
West Midlands (WM)	788	191
East Midlands (EM)	323	92
East of England (EoE)	825	174
South West (SW)	2,443	347
South East (SE)	3,131	513
Nil nights (Nil)	N/A	183

Source: International Passenger Survey by ONS

Nights (% share)

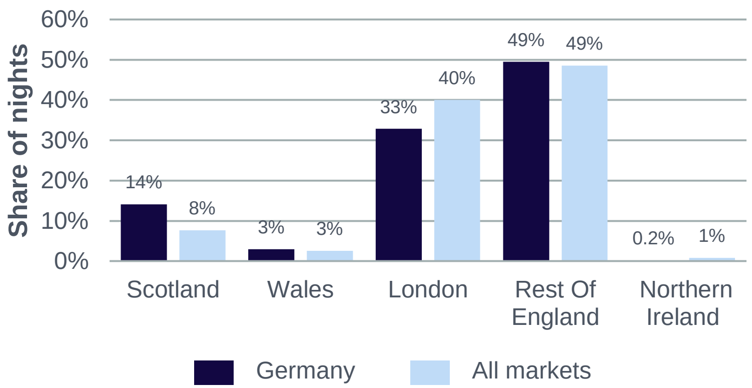


1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited 2016

Town	Visits (000s)
London	1,473
Edinburgh	230
Birmingham	93
Manchester	78
Glasgow	74

Regional spread 2016

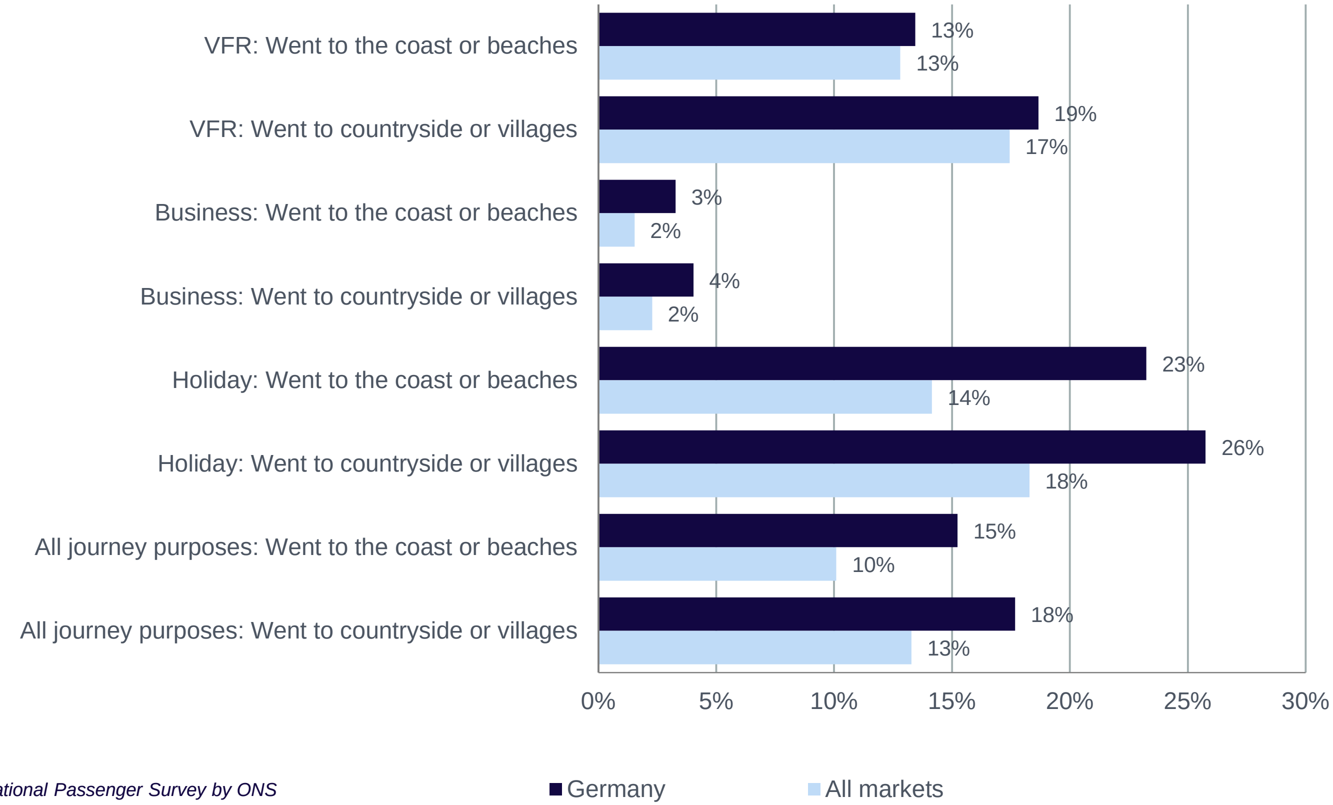


Source: International Passenger Survey by ONS, FUR Reiseanalyse 2016 and 2017

- German visitors show an above-average spread across the UK‘s nations and regions. London is the leading destination for a trip to Britain but South East, Scotland and South West are also popular.
- London is the number one international city trip and study holiday destination for Germans according to FUR Reiseanalyse.
- The potential of regional spread from German holiday visitors is very positive. Asked in 2016 in which of the regions they would like to spend a holiday in the next five years, German considerers stated Scotland (57%) and London (48%) as the most desired followed by South England (26%), Wales (19%), North England (13%) and Central England (12%) according to the FUR Reiseanalyse 2016.
- Holiday visits from Germany have an above average propensity to feature rural and coastal areas of Britain.

1.1 Key statistics: visits to coast, countryside and villages

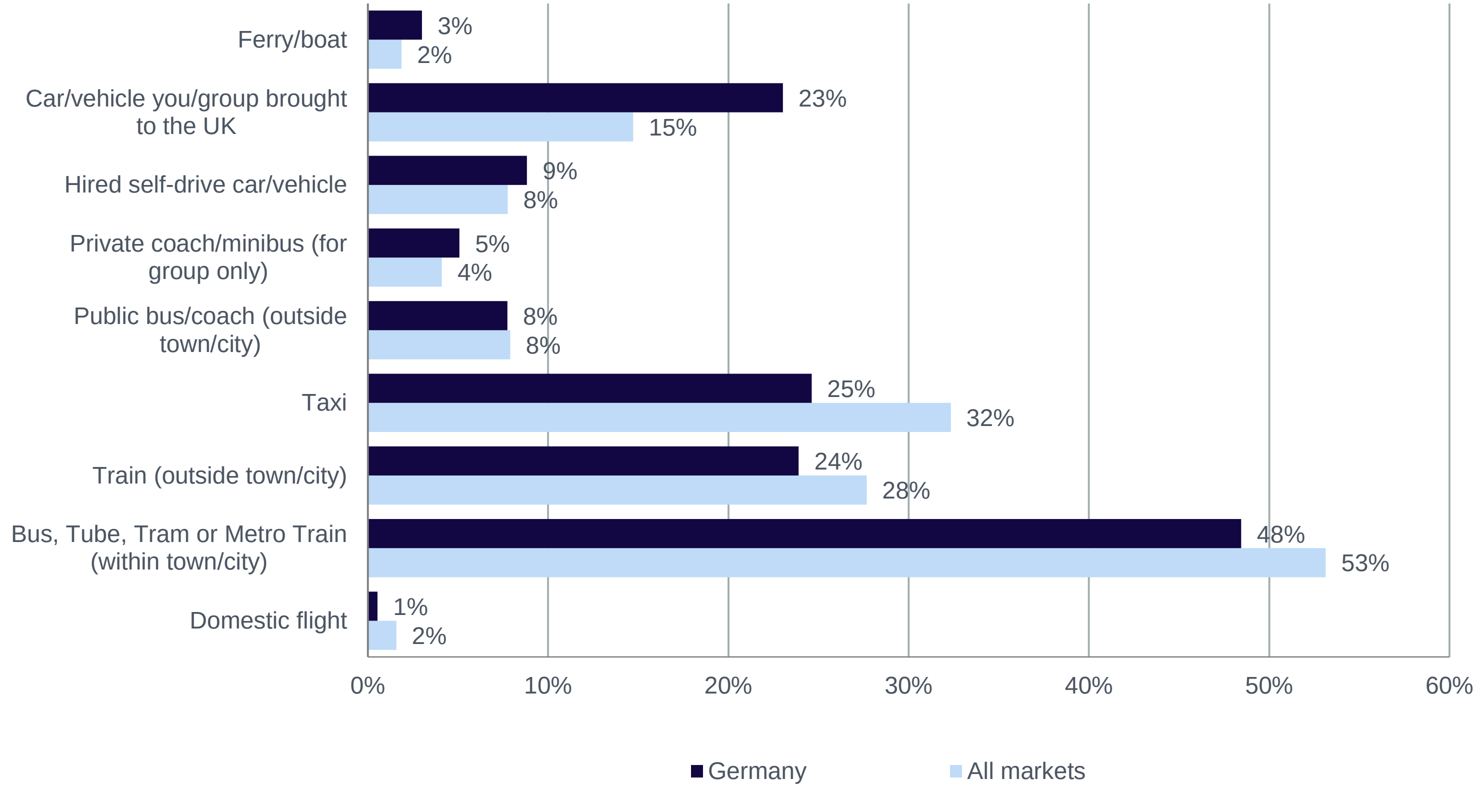
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS

1.1 Key statistics: use of internal modes of transport

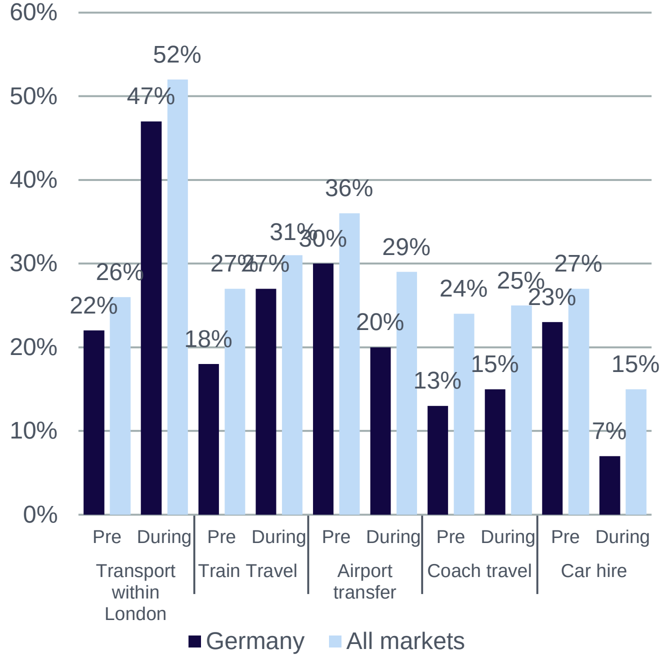
Propensity to use internal modes of transport



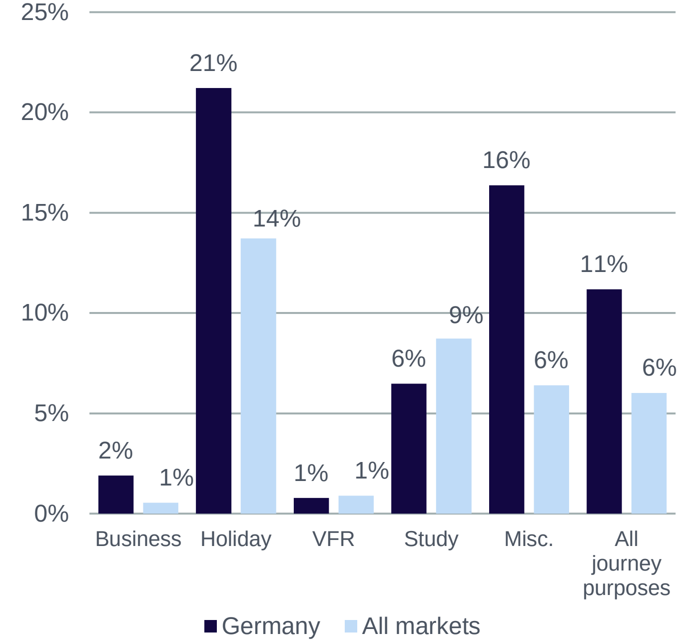
Source: International Passenger Survey by ONS

1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



Proportion of visits that are bought as part of a package or all-inclusive tour in 2016



International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors

1.2 Visitor demographics

Visitor characteristics

- Business visitors are four times as likely to be male than female.
- More than half of holiday visitors are making a repeat visit to Britain.
- A high proportion of holiday and business visitors are German nationals but 19% of VFR visitors were British nationals in 2016.
- 92% of departing Germans are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break.

92%

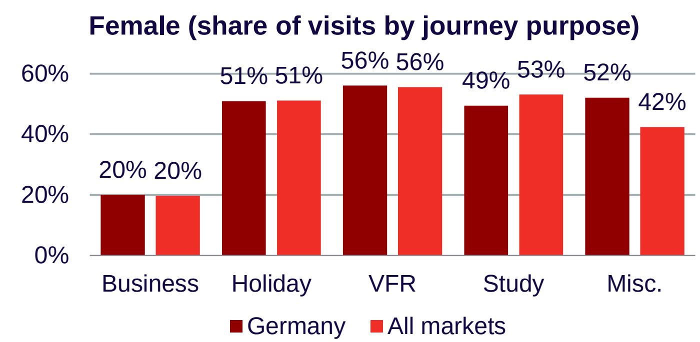
‘Very’ or
‘Extremely’ likely
to recommend Britain

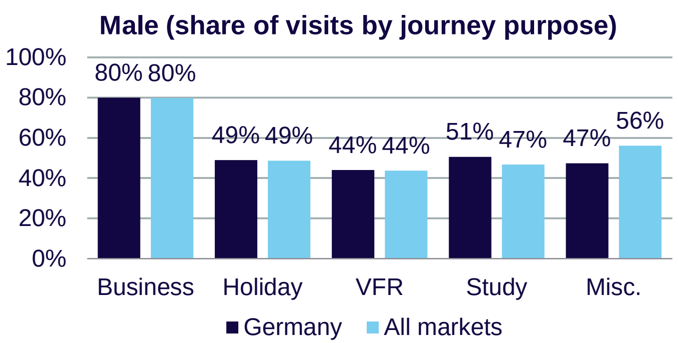
Source: International Passenger Survey by ONS, CAA 2016

1.2 Visitor demographics: gender and age groups

Visitor demographics:

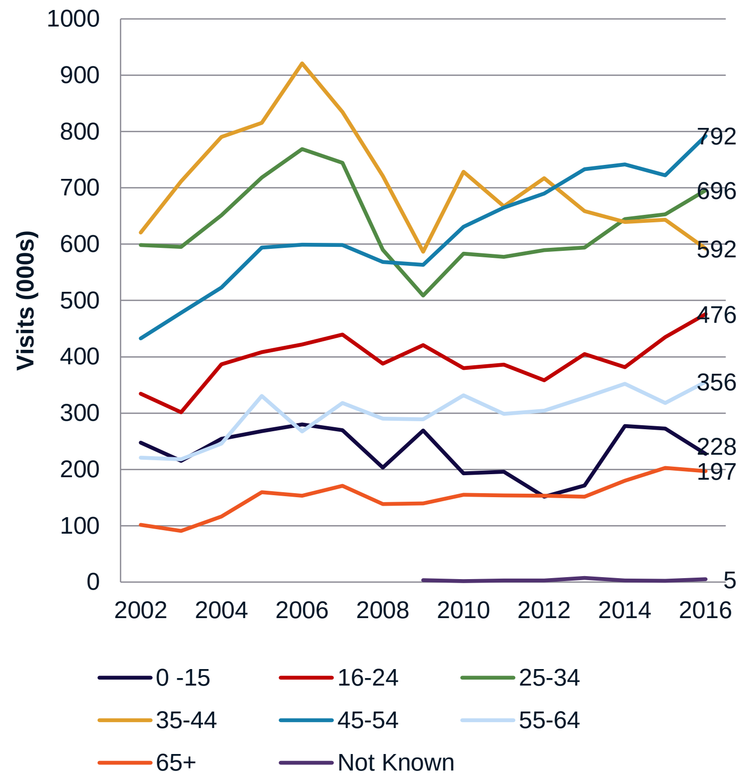
gender ratio of visits from Germany:
44% female, 56% male





Source: International Passenger Survey by ONS

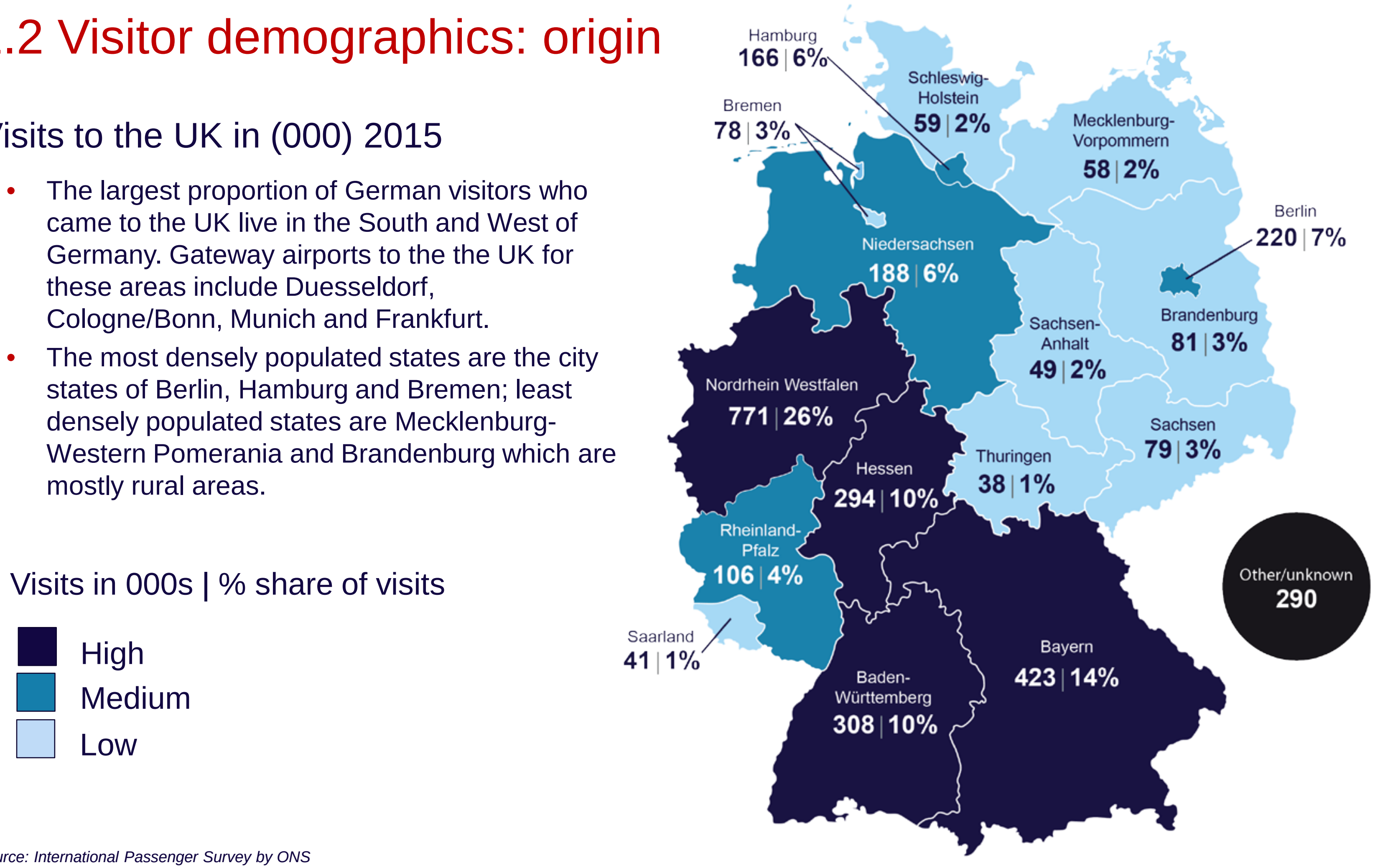
Age group trend



1.2 Visitor demographics: origin

Visits to the UK in (000) 2015

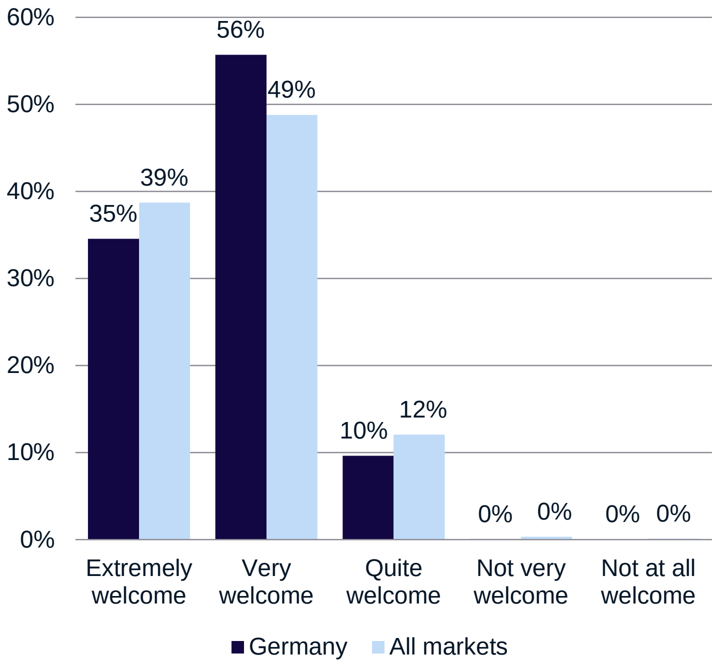
- The largest proportion of German visitors who came to the UK live in the South and West of Germany. Gateway airports to the the UK for these areas include Duesseldorf, Cologne/Bonn, Munich and Frankfurt.
- The most densely populated states are the city states of Berlin, Hamburg and Bremen; least densely populated states are Mecklenburg-Western Pomerania and Brandenburg which are mostly rural areas.



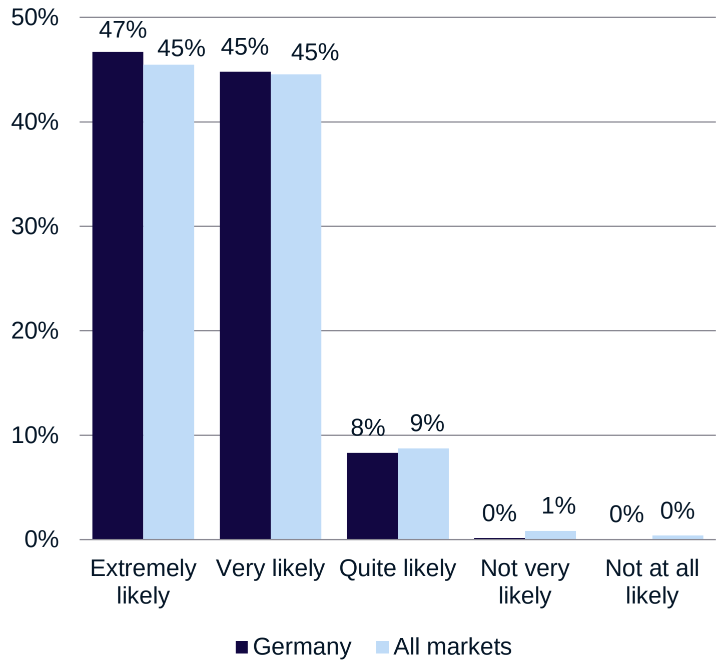
Source: International Passenger Survey by ONS

1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016

1.3 Britain and competitors

Market size, share and growth potential

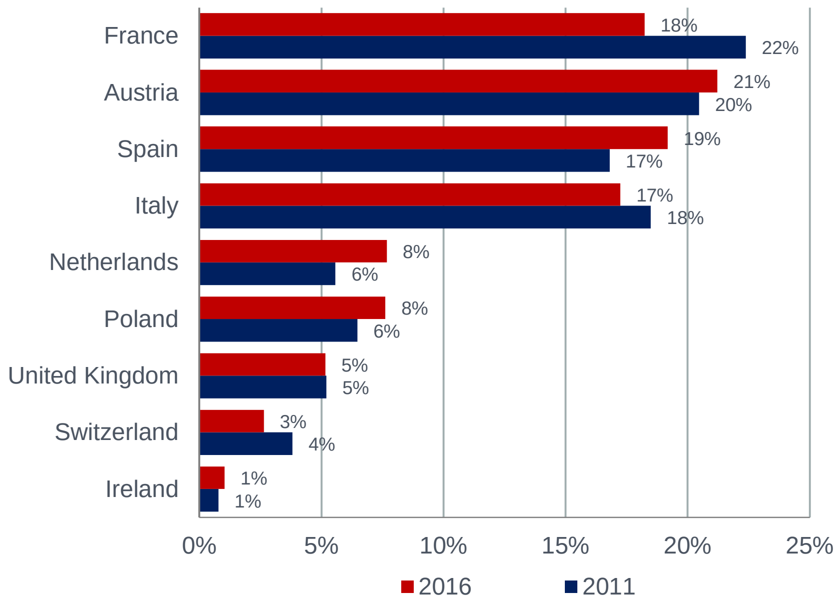
- Britain was the 8th most visited destination by Germans in 2016.
- Forecasts suggest there is the potential for steady growth in the number of visits to Britain during the next decade.
- Of those who came to Britain for a holiday, 25% considered Ireland, 19% France and 15% Spain as an alternative holiday destination.
- 21 million, 30% of all holiday trips taken by Germans in 2016 were domestic.

Britain ranks 8th
for German outbound destinations by volume

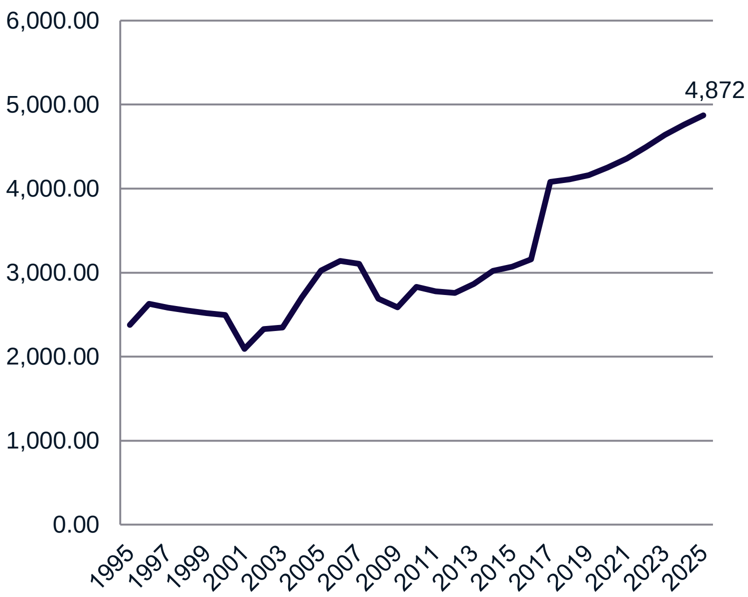
Source: Oxford Economics, VisitBritain/IPSOS 2016, FUR Reiseanalyse 2016 and 2017

1.3 Britain and competitors

Britain's market share of German visits among competitor set



Historic and potential visits to Britain (000s)

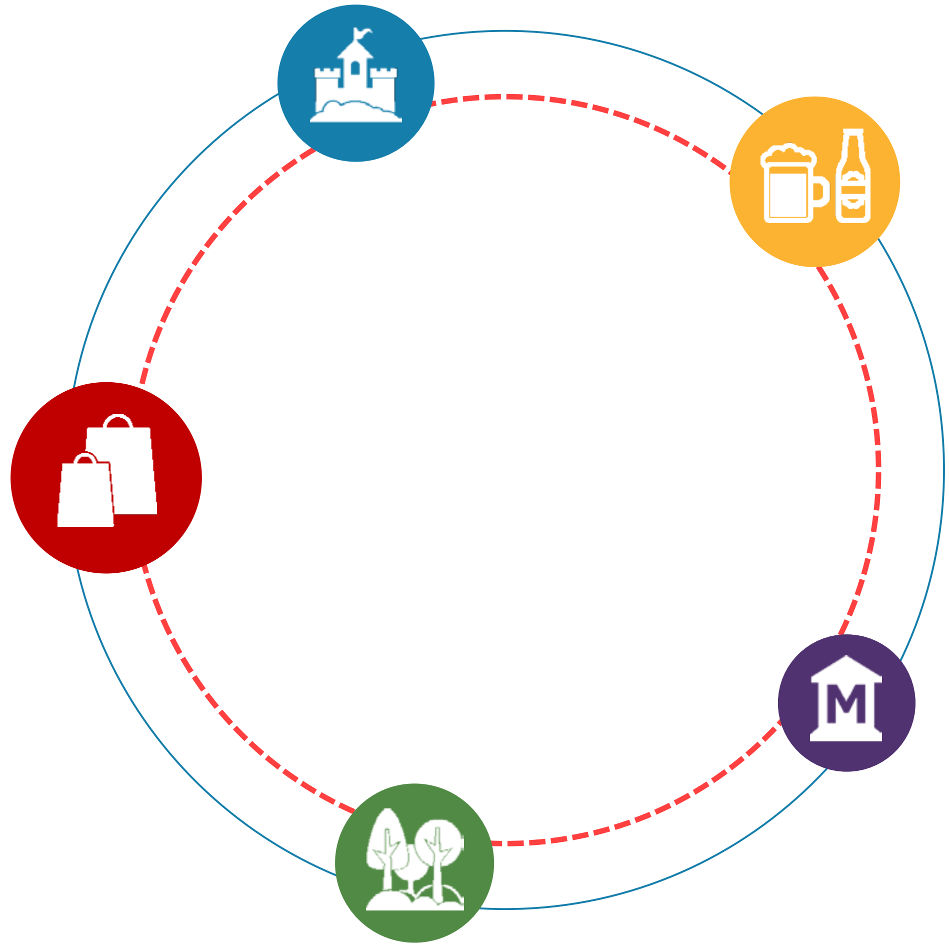


Source: Oxford Economics

1.4 Inbound activities

Inbound Britain

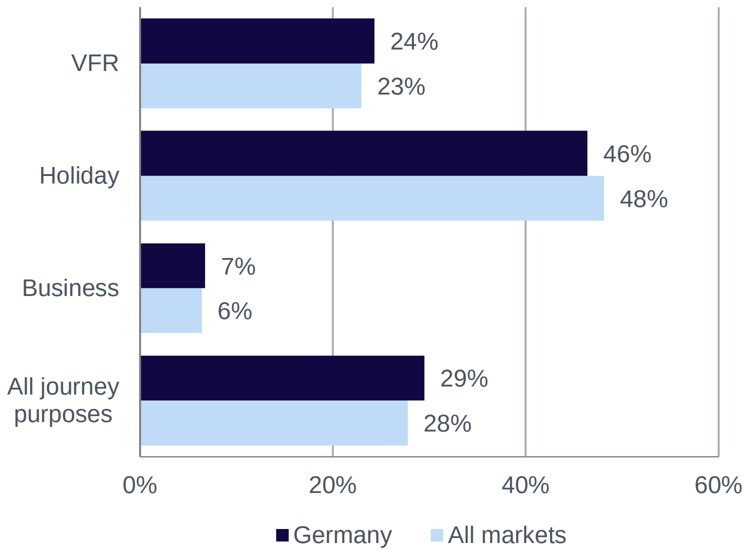
- Shopping is the number one activity which features in many German visits followed by going to the pub.
- More than half of holiday visits involve time in a park or garden.
- Built heritage sites, and especially castles, are important attractions for many visitors from Germany.
- German visitors are less likely than other visitors to go to a theatre or live music event while in Britain.
- Walking in the countryside or by the coast is an activity popular with many German visitors.
- About 50,000 German visits per annum feature time watching football.



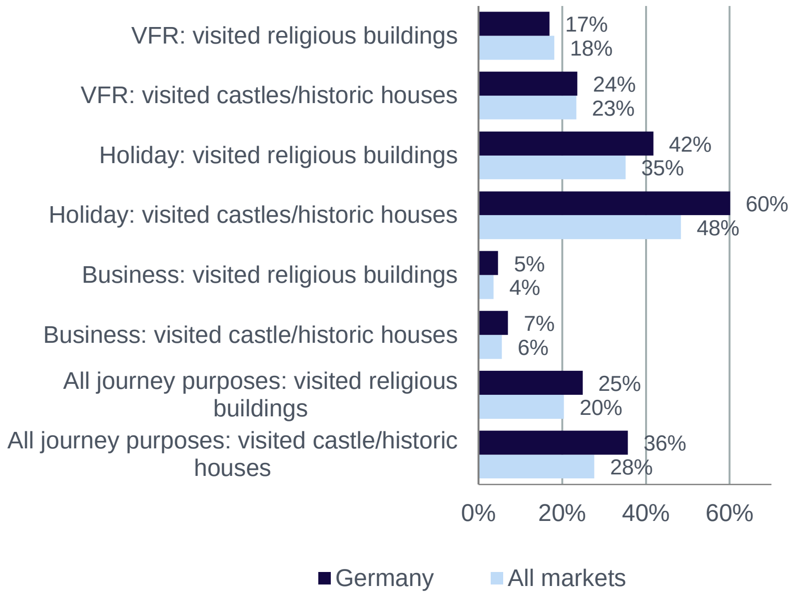
Source: International Passenger Survey by ONS

1.4 Inbound activities

Propensity to visit museums and galleries



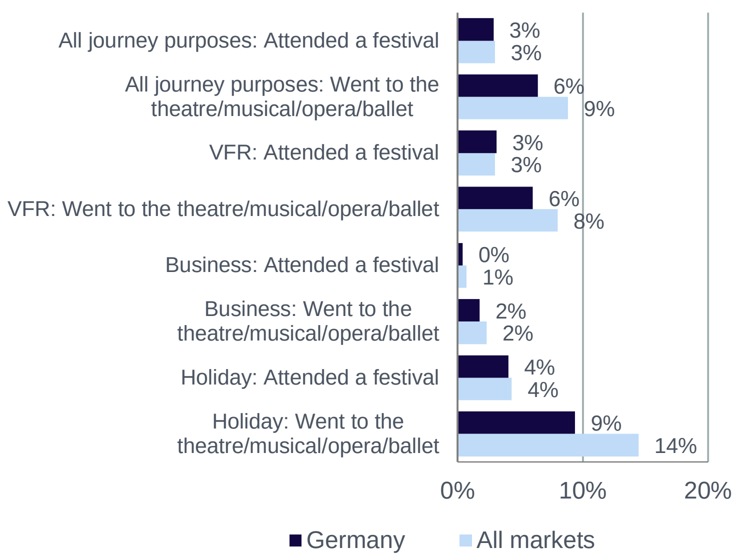
Propensity to visit built heritage sites



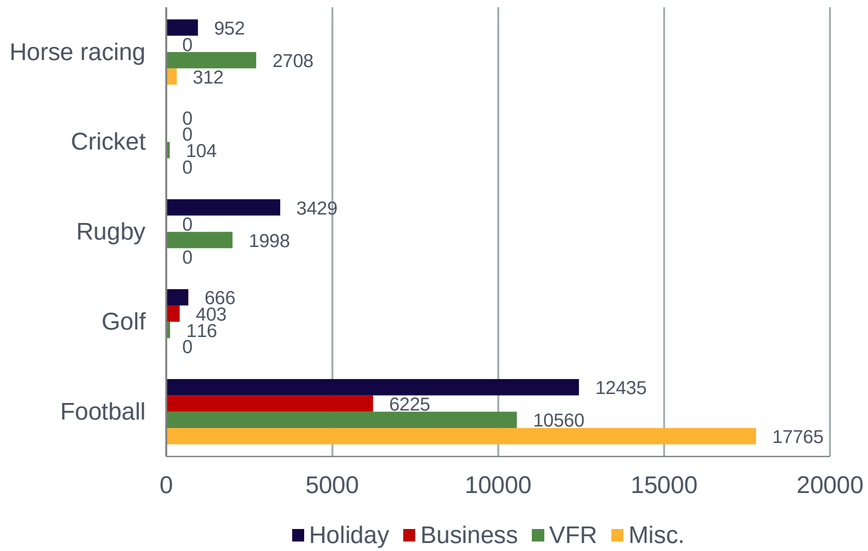
Source: International Passenger Survey by ONS

1.4 Inbound activities

Propensity to attend the performing arts



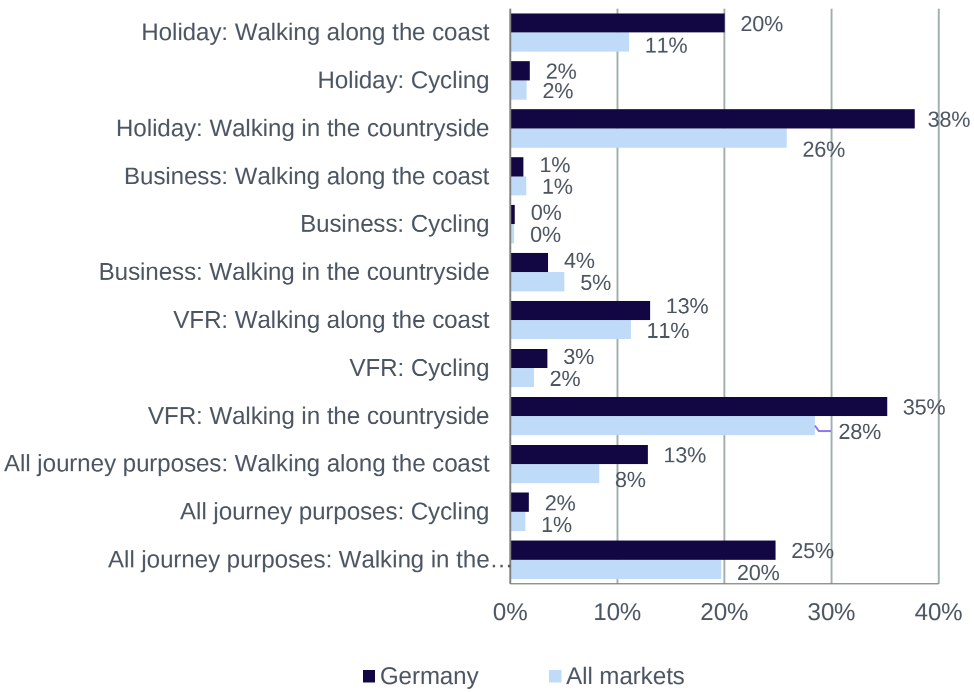
Number who went to watch sport live during trip



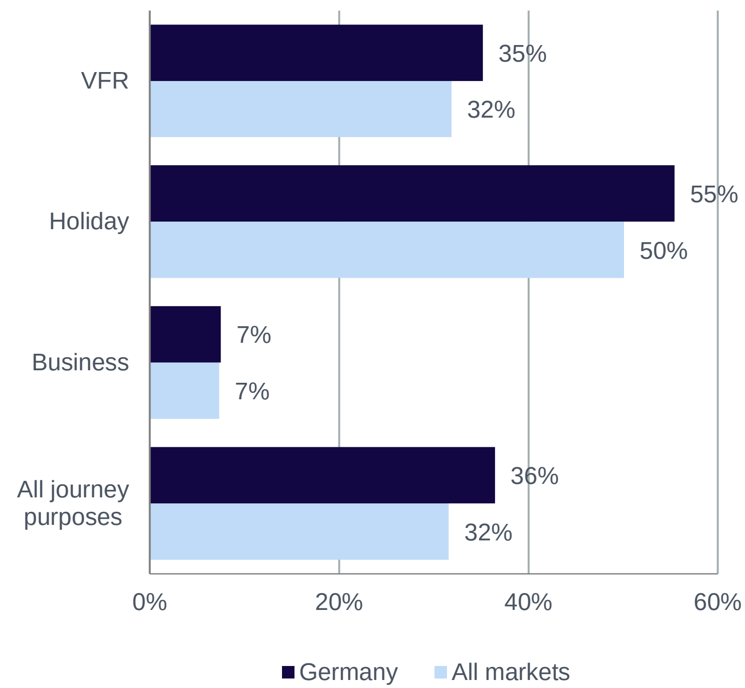
Source: International Passenger Survey by ONS

1.4 Inbound activities

Propensity to go for a walk or cycle



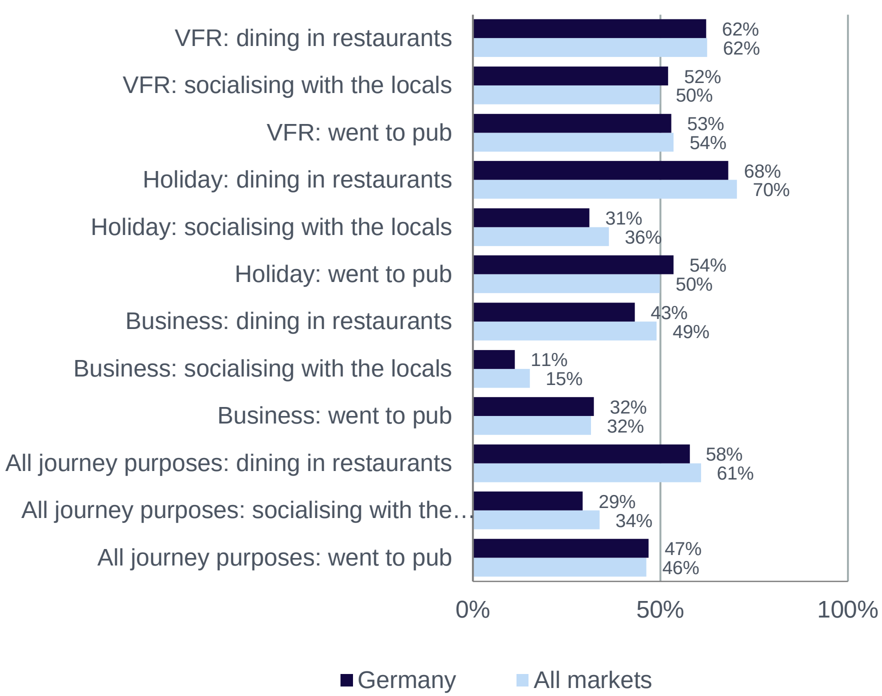
Propensity to visit a park or garden



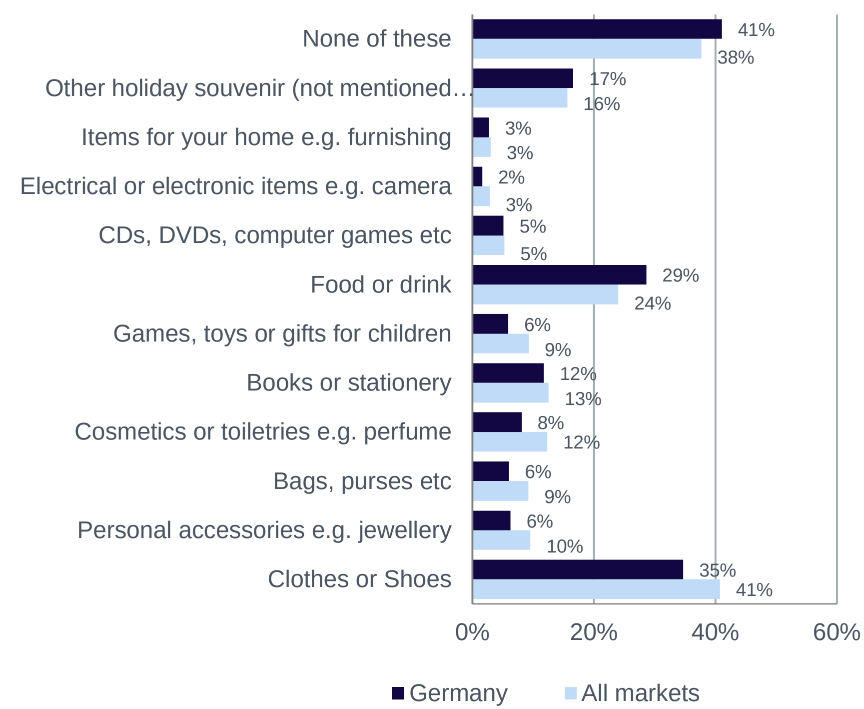
Source: International Passenger Survey by ONS

1.4 Inbound activities

Propensity to go to restaurants, pubs, night clubs and socialise with locals



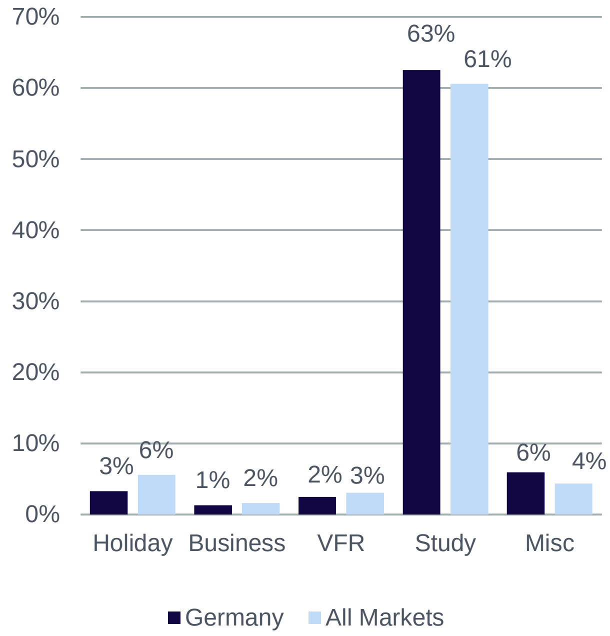
Propensity to purchase selected items (%)



Source: International Passenger Survey by ONS

1.4 Inbound activities

Propensity for visit to include an English language course (%)



Source: International Passenger Survey by ONS

Chapter 2:
Understanding the market

2.Understanding the market

Chapter summary

- Germany has the largest and second oldest population in Europe.
- Holidays tend to be an important part in the life of German people. Nearly one in three holiday trips they took in 2016 was a domestic holiday but they are keen outbound travellers, too.
- Germans tend to start thinking about their trip to Britain early and have a long lead-in time which can exceed half a year.
- Bookings are made most commonly in the three to six month window prior to the start of the trip. Only a small proportion book their travel arrangements in the month leading up to their departure.
- Friends, family and colleagues are the most important influences on destination choice.
- Germans rate Britain highly for cultural and built heritage, contemporary culture, vibrant cities and sports and associate museums and music most strongly with Britain.

Culture

Most important draw for German visitors

Source: World Bank, Oxford Economcis, FUR Reiseanalyse 2016 and 2017, VisitBritain/IPSOS 2016, GfK Anholt Nation Brands Index 2017

2.1 Structural drivers

Demographics & society

- Population of around 82.6 million, the most populous nation in Western Europe.
- Germany is a Federal Republic with the legislative elections due in 2017. There are 16 Bundesländer (federal states). The most densely populated states are the city states of Berlin, Hamburg and Bremen; least densely populated are Mecklenburg-Western Pomerania and Brandenburg which are mostly rural.
- Most Germans live in cities (75% according to World Bank Estimate).
- The official language is German; English often is the first or second foreign language Germans learn in school.
- German full-time employees receive 30 days annual leave plus have up to 10 public holidays/year; European average is 35.3 days in total.

82.6m
German population

Source: Oxford Economics, CIA World Factbook 2017, World Bank

2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2016 estimate
Total population	82,551,000
Net No. migrants per 1,000 population	1.5
Overall growth rate per annum	1.0%

Economic indicators (% growth unless stated)

Indicator	2016	2017	2018
Real GDP	1.8	2.0	1.6
Consumer spending	1.9	1.3	1.3
Unemployment rate	6.1	5.8	5.7
Average earnings	2.8	3.5	3.4
Consumer prices	0.5	1.9	2.1

Source: Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: general market overview

General market conditions

- Germany is Britain's 3rd most important source market in terms of visits and 2nd most important for visitor spending.
- The German economy is Europe's largest and generally speaking fairly robust and remains on track to grow at a solid pace in the near term, before slowing in the medium term. Unemployment is currently at a record low and consumer confidence and spend are very strong (Oxford Economics).

Key demographic and economic data

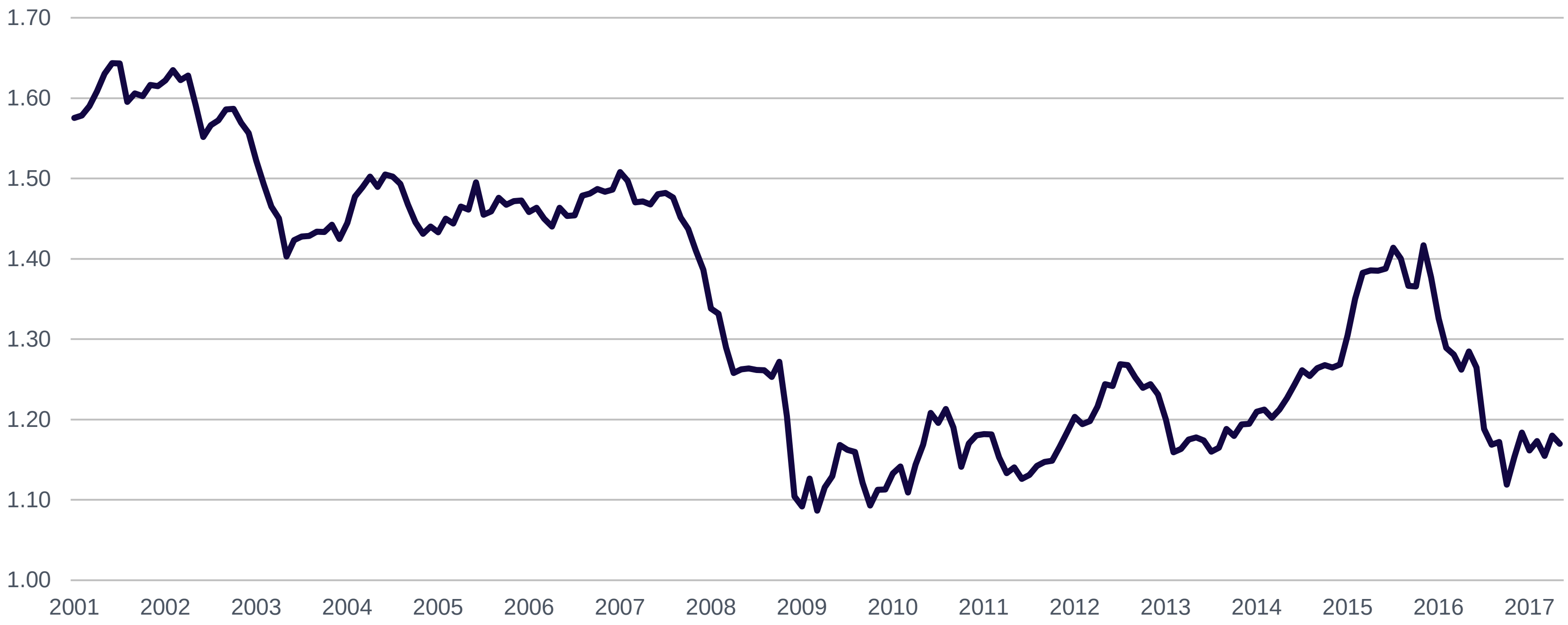
Measure (2016 data)	Germany	Eurozone
Population (m)	82.6	336.8
GDP per capita PPP (US$)	43,799	38,070
Annual average GDP growth over past decade (%)	1.2	0.6
Annual average GDP growth in 2016 (%)	1.8	1.7

Source:, Oxford Economics, Statistisches Bundesamt, Capgemini World Wealth Report 2016

- Legislative elections are set for 2017. The current German government is a 'Grand Coalition' formed after the 2013 elections with Angela Merkel continuing as Chancellor.
- The country has the second oldest population in Europe and the third oldest globally with a median age of 46.
- Germans enjoy a high standard of living with GDP per capita in purchasing power parity terms of around US$44,000, forecasted to increase in the years to come.
- According to the Capgemini World Wealth Report 2016 there were 1,199,000 High Net Worth Individuals (HNWI) resident in Germany, these being people with investible assets worth more than $1 million, representing an increase of 5% on 2014. This represents the third largest HNWI population behind the US and Japan.

2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in EUR)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source. Bank of England

2.2 Consumer trends

- 98% of Germans aged 14-29 and 96% aged 30-49 access mobile internet (Reiseanalyse 2017).
- E-commerce is very popular in Germany: 75% of Germans aged between 20-29 and 80% of Germans aged between 30-39 have bought goods or services online (HDE-Prognose 2015 and AGOF Internet Facts 2015-07).
- One of the strongest current trends in the market is the sharing economy with e.g. city car-sharing schemes being hugely popular (about 2 million users). Uber and Airbnb and local competitors Wimbdu and 9flats are, as the sharing economy in general, facing legal challenges in most German cities.

98%
of Germans aged 14-29 use mobile internet access

Source: FUR Reiseanalyse 2017, HDE-Prognose 2015, AGOF Internet Facts 2015-07

2.2 Consumer trends: overall travel trends

Travel trends

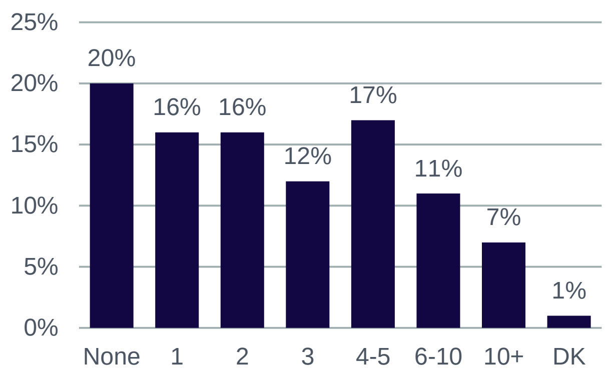
- The total number of holiday travellers (53.4 million in 2016) was stable and the total number of holiday journeys taken (68.7 million in 2015) slightly declined (Reiseanalyse 2017).
- Short holiday breaks continue to be very popular amongst Germans and have increased : 80.5 million short breaks of up to 4 nights were taken in 2016; 75% of these were domestic breaks. Austria, the Netherlands, Italy, Britain and France were the most popular international destinations for short breaks in 2016. London was the most popular city destination. Domestic city trips and city trips abroad have both declined in market share amongst short holiday breaks year-on-year (Reiseanalyse 2017).
- The German cruise market is still showing strong growth; the number of Germans who have taken an ocean or river cruise has grown by 19% to 2.2 million in 2015 (estimate, DRV Kreuzfahrtenmarktstudie).
- Reliance on traditional retail agents for travel bookings is much stronger than in many other European countries. In 2016 33% of all trips were booked through a traditional travel agent.

Source: FUR Reiseanalyse 2017, DRV Kreufahrtenmarktstudie

- The share of Germans booking their holidays online is increasing: 37% booked their holidays (or parts of it) online in 2016 (only 14% in 2006, FUR Reiseanalyse 2007 and 2017).
- Green destinations are increasingly popular: apart from Britain, Ireland, Iceland, Sweden and Norway have also seen significant growth from Germany. Active holiday types incl. activities such as walking and cycling and exploring destinations through a touring holiday are on the rise (Reiseanalyse 2014).
- The trade currently reports a mixed picture for bookings in general. Bespoke packages have seen growth (e.g. Dertour) whereas full packages have become less popular. This shows that the lines between bookings through tour operators and individual direct bookings have become increasingly unclear.

2.2 Consumer trends: motivation and attitudes to holidays

Number of overnight trips away from home for all journey purposes (%)



- The volume of outbound trips overall in 2015 was the highest of all source markets globally.
- The majority of Germans like to take more than one trip per year.

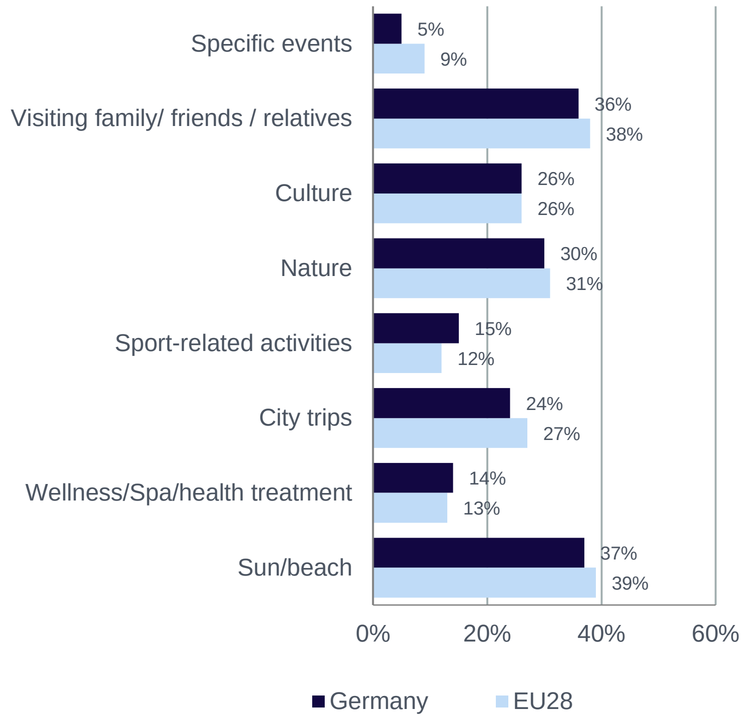
Motivation and attitudes to holidays

- Holidays are very important to Germans as they are considered necessary to escape from the pressure of life or the natural rewards for success and hard work.
- Germans are fairly unlikely to amend their holiday plans due to the economic situation (76% reported that it has had no impact on their 2015 holiday plans, EC Study).
- Amongst the most popular holiday destinations are typical sunshine locations such as the Mediterranean with Spain being most popular. Turkey has become a very popular destination for families due to its all-inclusive offers but has, like Northern Africa seen recent decline in German visitor numbers after political unrest and terror attacks.
- Neighbouring countries including Austria, Switzerland, France, Poland and the Netherlands are very popular for trips taken by car and rail and short trips.
- Destinations like Britain (outside London), Ireland and the Scandinavian countries tend to attract travellers seeking slightly more adventurous activities. They often tend to have an above-average income and education, often from older groups.

Source: Oxford Economics, FUR Reiseanalyse 2017, Flash Eurobarometer 432 by EC 2016: During 2015, how many times did you travel for professional or personal reasons where you were away from home for a minimum of one night?

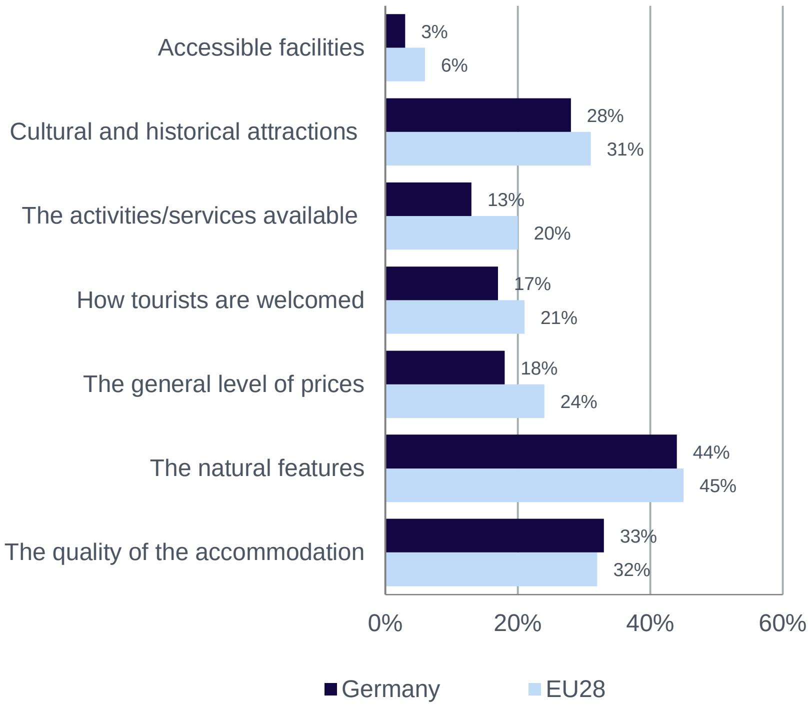
2.2 Consumer trends: reasons for holidays

Main reasons for going on holiday (%)



- Amongst the main reasons for going on a holiday for Germans are: sun/beach, nature, visiting family/friends and relatives followed by nature, culture and city trips

Reasons to return to the same destination for a holiday



- Asked for reasons which would make them come back, Germans tend to value natural features and the quality of accommodation is also found to be key for 1 out of 3.

Source: Flash Eurobarometer 432 by EC 2016: What were your main reasons for going on holiday in 2015? Firstly? And then? and Which of the following would make you go back to the same place for a holiday? Firstly? And then?

2.3 Booking and planning

- German visitors tend to have a long lead-in time in comparison to other markets. They start thinking about their trip early with the majority as early as half a year or more in advance.
- The most common time for German visitors to make a booking is in the three to six month window before their arrival in Britain. Only a small proportion of visitors book their trip to Britain less than a month before.
- Most bookings to Britain were made online; however, when travel and accommodation are booked together, one in three visitors made the booking face-to-face. This is a fairly large share in comparison to other European markets.

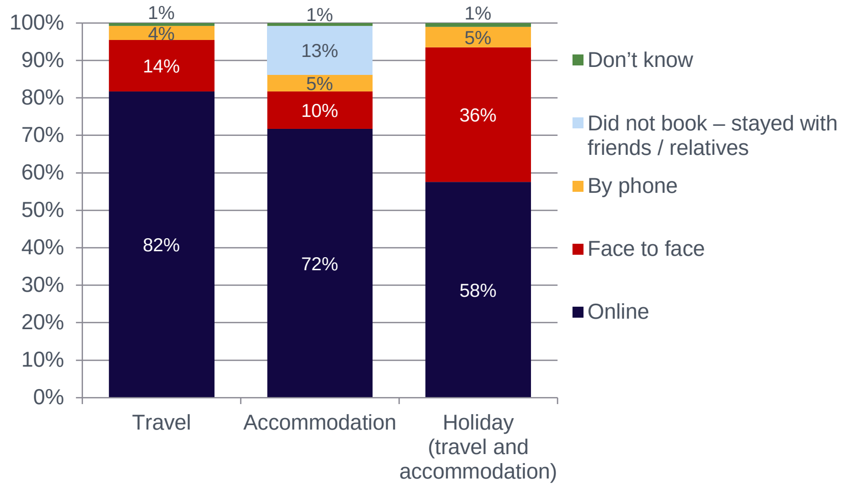
6 months+

Germans tend to start thinking about their trip to Britain early

Source: VisitBritain/IPSOS 2016

2.3 Booking and planning: booking channels and ticket sales

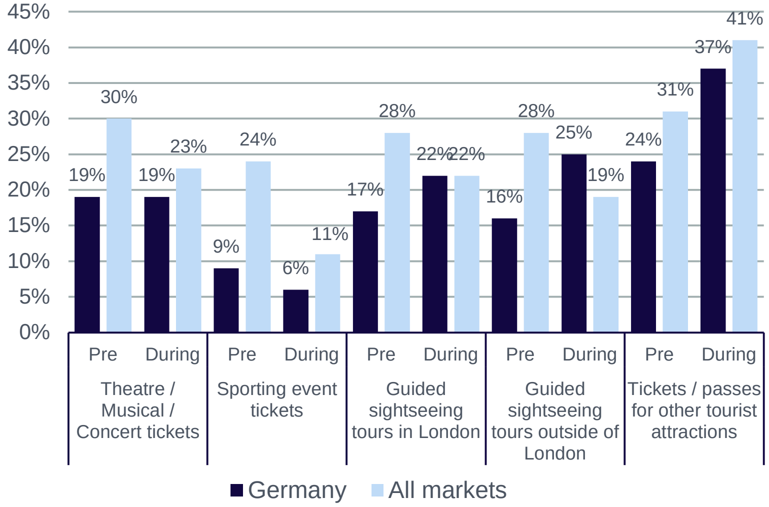
How trips to Britain were booked



- German visitors have become increasingly comfortable with booking their trips to Britain online, especially when they booked travel (i.e. transport to Britain).
- More than one in three bookings were made face to face when booking a holiday arrangement (i.e. travel and accommodation combined) which is higher than in many other source markets.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey), FUR Reiseanalyse 2017

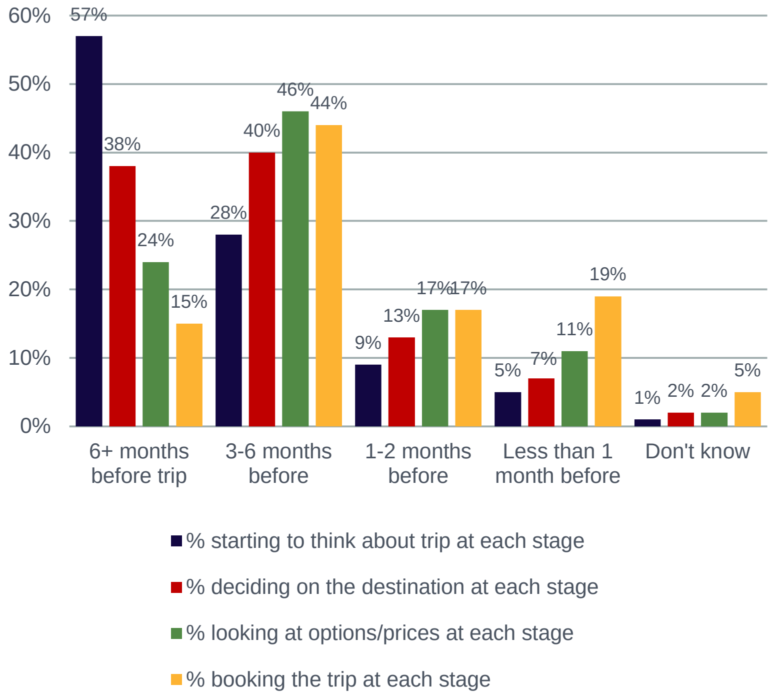
Propensity to make a purchase before or during trip



- Prior to trip: Nearly one in five Germans booked theatre/musical/concert tickets before their journey and nearly one in four bought tickets/passes for miscellennaneous tourist attractions in advance.
- During the trip: More than one in three bought tickets/passes for miscellennaneous tourist attractions. One in four purchased guided sightseeing tours outside of London.

2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



Source: VisitBritain/IPSOS 2016, base: visitors

- Germans tended to start thinking early about their trip to Britain and had a longer lead-time than the all market average. Nearly three in five started thinking about their trip six months or more in advance, while 28% did this in the three to six month window.
- Roughly two in five decided to travel to Britain either six months or earlier. A similar proportion of travellers knew at least three months prior to the actual journey; both are above the all market average.
- Almost half of German visitors looked at options and prices between three and six months ahead of their trip and also made the booking in the same time frame. Only one in five were more spontaneous and booked the trip to Britain less than a month before travelling to Britain.
- The majority of Germans who booked travel and accommodation separately booked it directly with the service provider e.g. airline (76% and 62% respectively). When they bought travel and accommodation together as a package 70% chose to book it through a travel agent, tour operator or travel comparison website.

2.4 Reaching the consumer

- The most influential source for destination choice for Germans are friends, relatives and colleagues followed by information from search engines and price comparison websites.
- Whilst travel providers and online sources such as social media are popular for researching and making a destination choice, one in three Germans consult travel guidebooks.
- Germans, on average, watch more than 3.5 hours of TV per day and listen to the radio for more than 4 hours per day.

Friends, family & colleagues

#1 Influence for the destination choice of Germans

Source: Oxford Economics, VisitBritain/IPSOS 2016, FUR Reiseanalyse 2016 and 2017

2.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- Germans watch TV for 223 mins. on average each day (AGF/GfK, 2015).
- Biggest national public TV channels are ARD, ZDF and their regional subchannels e.g. SWR, SR, WDR, RBB, NDR and BR.
- Commercial TV landscape: RTL group and ProSiebenSAT1 media group, pay TV: Sky, some local TV channels and teleshopping channels.
- Dedicated travel programmes: “Da will ich hin…” (SR), “Service Reisen” (HR), “Reisewege” (SWR) and “Nordseereport” (NR) as well as inter-cultural travel programmes on the German-French quality channel ARTE.

Radio

- There are >100 major radio stations in Germany and a large number of smaller private channels; hardly any of them have any dedicated travel programmes but they still offer good media opportunities and they often have apps for smartphones and tablets to increase their audience.
- >56 million Germans listen to the radio on average 4 hours/day.

Newspapers

- The German newspaper market is the biggest in Europe: 45.3 million read newspapers each day (=65% of the population; die-zeitungen.de, 2015); local papers make up a large part of this market.
- The main publishing houses are spread across the country with Berlin being one of the most prominent media centres.
- The biggest national titles include: BILD, Süddeutsche Zeitung (SZ), Frankfurter Allgemeine Zeitung (FAZ), Welt, Frankfurter Rundschau (FR), Tageszeitung (Taz), Tagesspiegel, Neues Deutschland (ND) with BILD being the highest-selling tabloid in Europe (circulation: 2.57 million).
- All newspapers have weekly travel or lifestyle sections with the content being a compilation of internally produced travel features (often the result of press visits) and articles from news agencies and freelance journalists.

Source: AGF/GfK 2015, die-zeitungen.de 2015,

2.4 Reaching the consumer: magazines and online media

Magazines

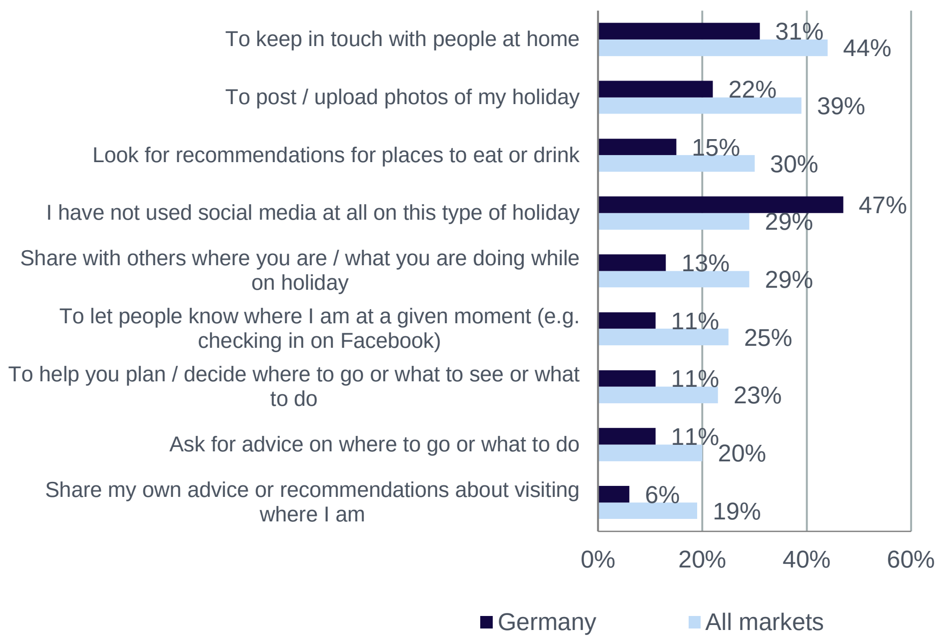
- Almost 1,600 titles – more than 32.7 million Germans read a magazine at least weekly with TV magazines having the highest circulation; the market is highly competitive and not saturated despite the large number of magazines.
- Top 5 German travel magazines by circulation: "ADAC Reisemagazin" (circulation: 94,838), "Geo Saison" (88,638), "Reise und Preise" (72,060), "Abenteuer Reisen" (58,494) and "Lonely Planet Traveller Magazine" (55,000).
- **Ongoing trend topics:**
  - Rediscovery of men as promising target group: Freeman's World (adventure, travel, life style) and Tweed (British lifestyles)
  - DIY magazines (COUCH, D.I.Y)
  - Blog style magazines (I LIKE BLOGS)
  - New titles: EASY (weekly women's magazine), SALON (hospitality, interior design, lifestyle, food)
  - Country-style magazines are also a great media platform; the market leader is "Landlust" (1 million sold copies)

Online media

- Growing usage of apps and mobile enabled websites (MEW) resulted in an increase in the number of registered online media: 1,067 online media suppliers are registered subject to a regular official and independent review – these are a mixture of "classic" online media suppliers and online versions of traditional media, apps or MEWs (http://asuweisung.ivw-online.de).
- Print goes digital:
  - E-paper circulation of 780,134 overall in 2015
  - choice of more than 600 apps
  - traffic is growing
  - 2/3 of internet users from 14 years of age consult online newspaper sites; most popular versions: bild.de, Focus online and Spiegel Online
- Travel blogs are less popular than in other European countries with a limited number of them available. Many of them include social media presences; www.planetbackpacker.de was the most influential German travel blog in 2015 (Top Blog Ranking). The German language can act as a barrier to obtaining a large global following.
- The importance of YouTube has increased and some German vloggers are very popular with hundreds of thousands of followers – they might not focus on travel in particular but are trusted amongst their young followers.

2.4 Reaching the consumer: social media on holiday

Use of social media on holiday

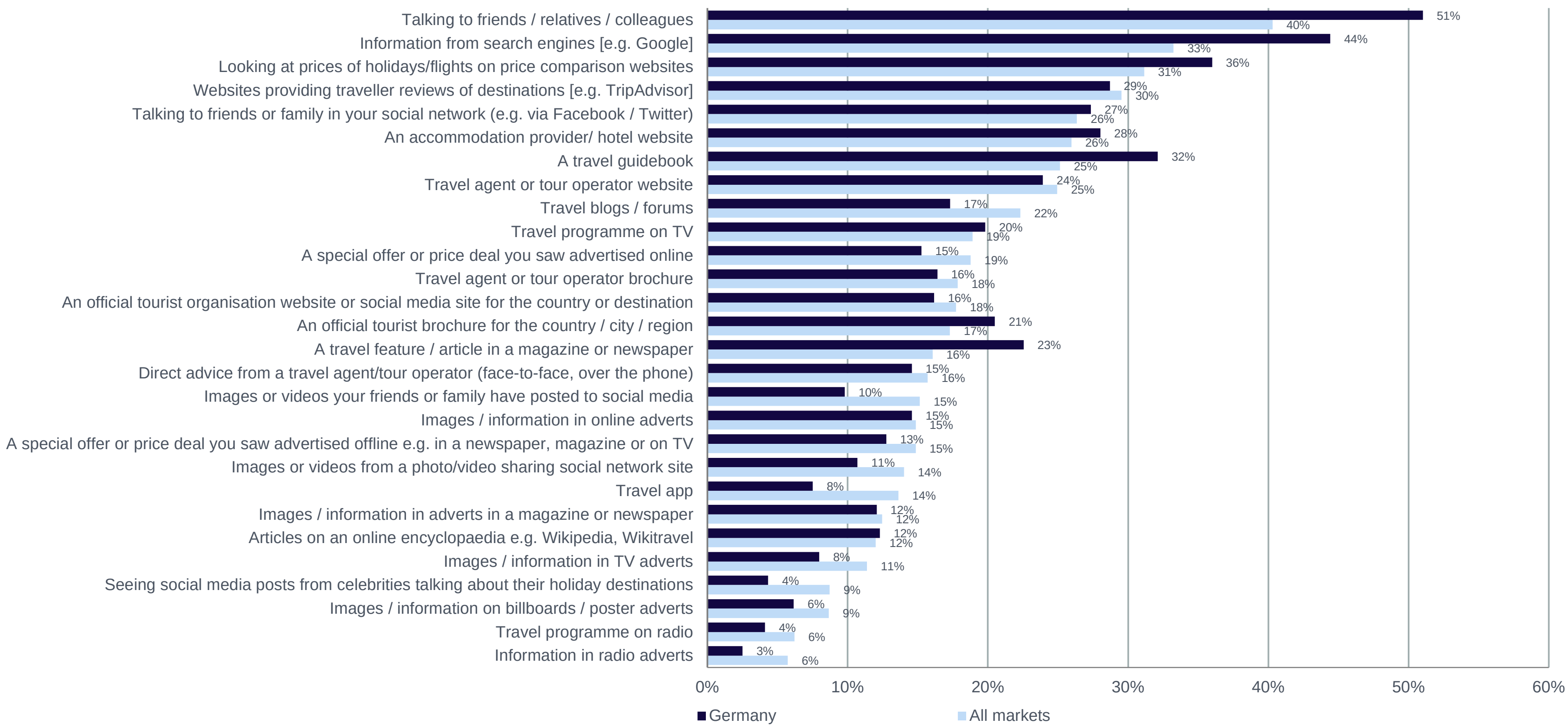


- Germans tend to have below-average usage of social media (whilst on holiday) but still roughly one in three use it to keep in touch with people at home and one in five use it to post or upload photos of their holiday.
- The social media channels most used in the German market are YouTube, Facebook, Google +, Twitter, Instagram and Pintererst.
- 63% of Germans regard a smartphone as essential whilst they are on holidays.
- 84% of Germans love to take photos when they are on holidays which is above average compared to all other markets and only topped by Italian respondents when compared to other European markets.
- Germans have a below-average propensity to share their photos whilst on holiday and are less likely to share video content whilst on holidays in comparison to other markets.

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

2.4 Reaching the consumer: influences

Influences on destination choice



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, *to enable meaningful comparisons)*

2.5 Perceptions of Britain

- Germans rate Britain highly for cultural and built heritage, contemporary culture, vibrant cities and sports, but less so for scenic natural beauty and welcome; Britain is rated 26th and 22nd out of fifty nations respectively on these two attributes.
- Museums and music are the cultural products or services most strongly associated with Britain among Germans.
- A trip to Britain would be expected to be 'Educational' and 'Fascinating' by Germans.
- Australia and to a lesser extent the USA are the destinations that Germans consider the 'best place' for delivering the things they most want from a holiday destination.
- Areas of strength for Britain include being somewhere to see 'famous sites' and for 'lots of history' while very few consider Britain is the 'best place for 'food and drink'.
- Activities that appeal to potential visitors from Germany include a visit to Buckingham Palace and spotting wildlife in the Scottish Highlands.

Areas of strength for Britain:
Culture, history and famous sites

Source: GfK Anholt Nation Brands Index 2017, Arkenford 2013

2.5 Perceptions of Britain

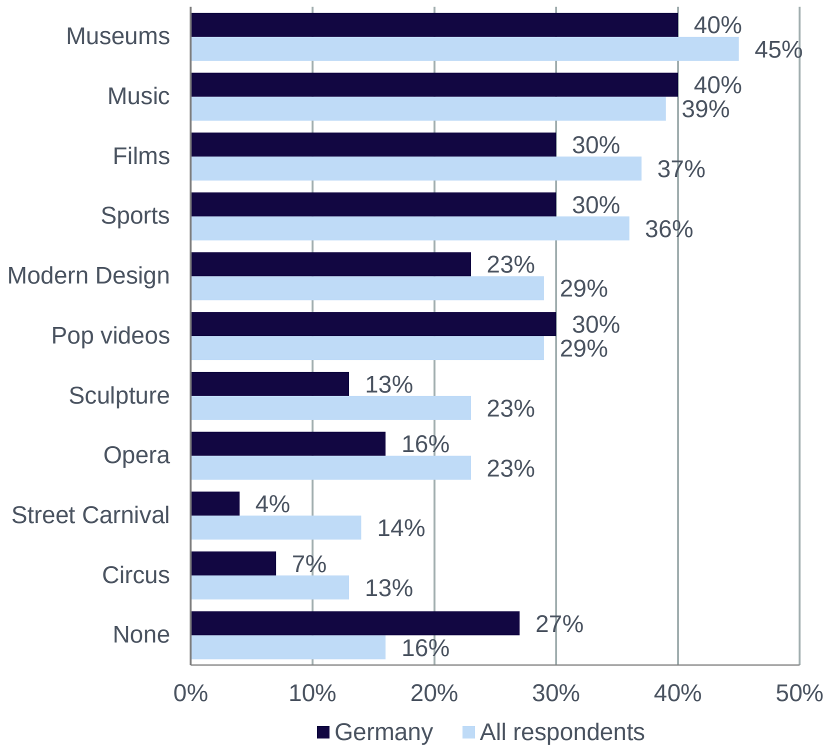
Britain's ranking (out of 50 nations)

Measure	German respondents	All respondents
Overall Nation Brand	10	3
Culture (overall)	4	5
The country has a rich cultural heritage	6	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	3
The country excels at sports	6	4
People (overall)	18	6
If I visited the country, the people would make me feel welcome	22	13
Tourism (overall)	11	3
Would like to visit the country if money was no object	17	6
The country is rich in natural beauty	26	24
The country is rich in historic buildings and monuments	6	5
The country has a vibrant city life and urban attractions	5	4

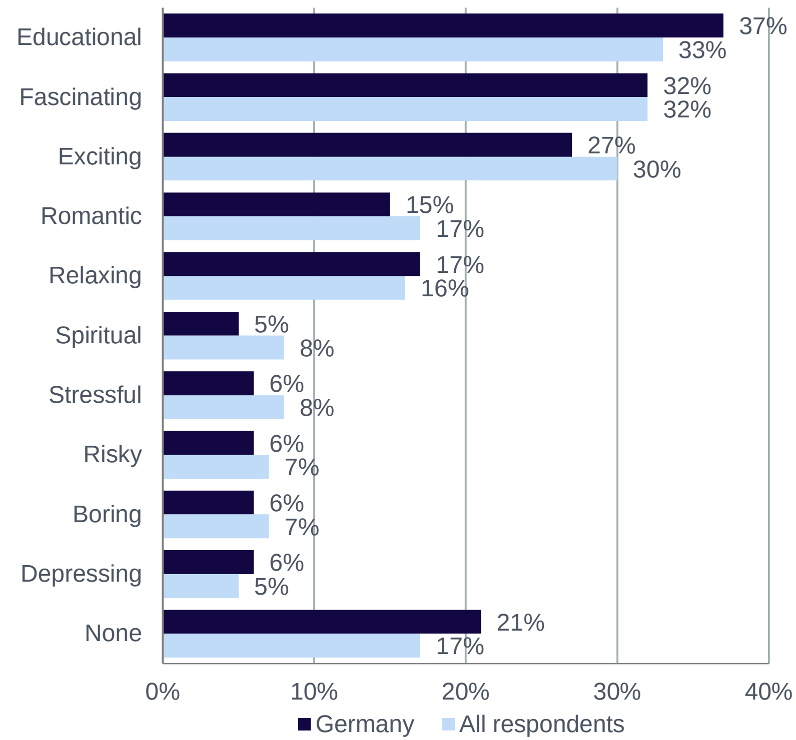
Source: GfK Anholt Nation Brands Index 2017

2.5 Perceptions of Britain

Cultural associations



Adjectives describing a potential trip to Britain



Source: GfK Anholt Nation Brands Index 2017

2.5 Perceptions of Britain

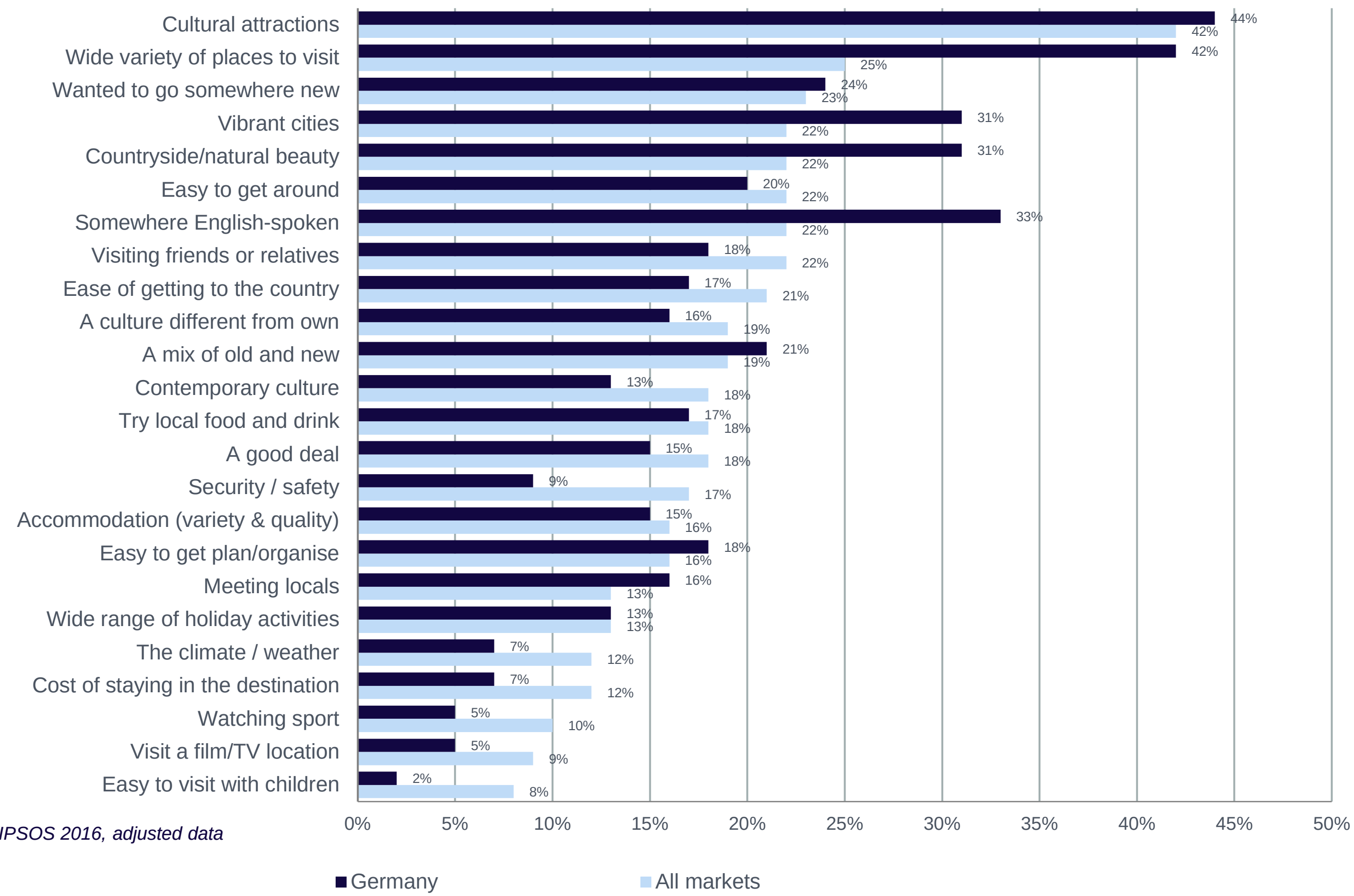
Holiday wants and % saying destination is best place for…

Importance		GB	FR	IT	AU	US	NL
6.15	Enjoy the beauty of the landscape	14%	35%	35%	53%	31%	14%
6.14	Have fun and laughter	15%	13%	17%	23%	30%	10%
6.02	Soak up the atmosphere	9%	19%	28%	30%	17%	7%
6.01	Explore the place	15%	18%	17%	33%	33%	12%
5.97	Enjoy local specialities (food and drink)	6%	53%	48%	15%	10%	6%
5.96	Do what I want when I want spontaneously	6%	10%	11%	24%	37%	15%
5.95	Offers good value for money	9%	13%	21%	10%	13%	21%
5.95	The people are friendly and welcoming	15%	20%	28%	34%	28%	23%
5.89	Do something the children would really enjoy	13%	20%	28%	32%	37%	14%
5.88	Enjoy peace & quiet	10%	20%	21%	36%	11%	15%
5.80	Broaden my mind/ Stimulate my thinking	19%	20%	22%	39%	37%	10%
5.75	Get some sun	3%	20%	48%	49%	21%	9%
5.71	Experience things that are new to me	9%	10%	12%	58%	42%	9%
5.60	See world famous sites and places	38%	40%	47%	35%	44%	12%
5.60	Be physically healthier	9%	20%	26%	25%	14%	14%
5.60	Have dedicated time with my other half	20%	38%	37%	33%	28%	23%
5.59	It offers unique holiday experiences	19%	24%	27%	60%	55%	14%
5.58	Feel connected to nature	8%	25%	17%	49%	20%	16%
5.48	Chill/ slow down to a different pace of life	7%	17%	23%	24%	11%	12%
5.38	Visit a place with a lot of history/historic sites	41%	48%	52%	20%	27%	11%
5.36	Meet the locals	11%	11%	18%	30%	21%	10%
5.33	Provides a wide range of holiday experiences	21%	27%	31%	47%	54%	15%
5.27	Get off the beaten track	7%	14%	9%	40%	23%	9%
5.26	Experience activities/places with a wow factor	22%	17%	16%	63%	66%	10%
5.17	Feel special or spoilt	8%	21%	22%	27%	31%	10%
5.05	Revisit places of nostalgic importance to me	21%	27%	37%	17%	19%	21%
4.98	Good shopping	34%	27%	32%	15%	59%	14%
4.92	A good place to visit at any time of year	15%	23%	25%	37%	37%	16%
4.88	Easy to get around by public transport	19%	23%	19%	7%	14%	28%
4.86	Enjoy high quality food and drink (gourmet food)	7%	66%	42%	18%	10%	7%
4.55	Do something environmentally sustainable/ green	28%	31%	19%	35%	24%	29%
4.53	Meet and have fun with other tourists	16%	8%	17%	51%	45%	28%
4.53	Visit places important to my family's history	10%	18%	25%	23%	21%	11%
4.52	To participate in an active pastime or sport	12%	22%	29%	35%	31%	19%
4.18	Experience adrenalin filled adventures	18%	11%	14%	41%	37%	9%
3.98	Fashionable destination	15%	27%	34%	42%	45%	13%
3.93	Go somewhere that provided lots of laid on entertainment/nightlife	23%	24%	27%	23%	55%	18%
3.66	Watch a sporting event	33%	18%	26%	27%	29%	17%
3.64	Party	13%	23%	22%	23%	43%	27%
3.50	Do something useful like volunteering to help on a project	15%	29%	11%	23%	22%	25%

Source: VisitBritain/Arkenford 2013

2.4 Reaching the consumer

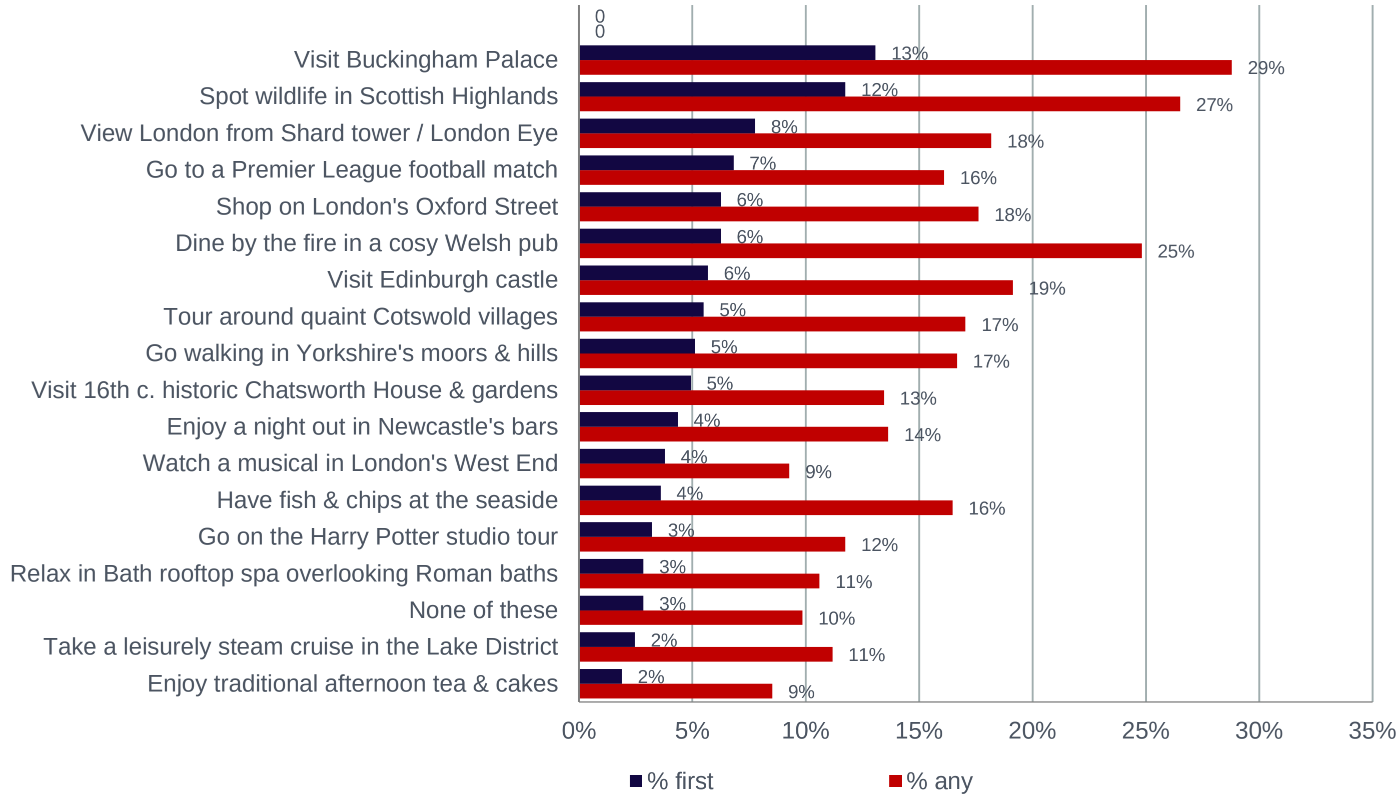
Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, adjusted data

2.5 Perceptions of Britain

Sought-after Britain activities



Source: GfK Anholt Nation Brands Index 2013; If you went on a holiday/vacation to Britain which of the following activities would you most like to do? Please choose a first, second and third choice

Chapter 3:
Access and travel trade

3. Access and travel trade

- It is possible to reach many destinations in Britain by air from Germany. There are also direct coach services and a simple change of train in Brussels enables visitors to reach Britain by rail.
- Monthly airline seat capacity from Germany to Britain has grown in recent years. Many airlines operate flights from Germany to Britain with Lufthansa being the largest carrier followed by British Airways.
- The German travel market is very mature, there are a few big players dominating the market but also a fair number of small specialist operators with comprehensive Britain programmes.
- Although in Germany retail agencies are still more important than in other European countries they are now increasingly facing competition from Internet travel portals.

~800,000

Monthly airline seat capacity from Germany to Britain in early 2016

Source: Apex Rdc 2016

3.1 Access: key facts

- Most Germans travel to the United Kingdom by plane. It is a very short non-stop flight: usually about 1-1.5 hrs flight time.
- The destination can also be accessed by direct coach services, by car through the Channel Tunnel, by ferry or by a simple change of train in Brussels or Paris.
- Seat capacity has steadily increased in recent years.
- German visitors departing Britain by air pay £13 in Air Passenger Duty.
- The above average regional spread of German visitors is supported by the connectivity to many regional airports in the United Kingdom.
- The small annual share of some regional airports can be due to seasonal connectivity e.g. Frankfurt-Hahn – Newquay which only runs in the summer schedule.

Source: Apex RdC 2016, non-stop flights only

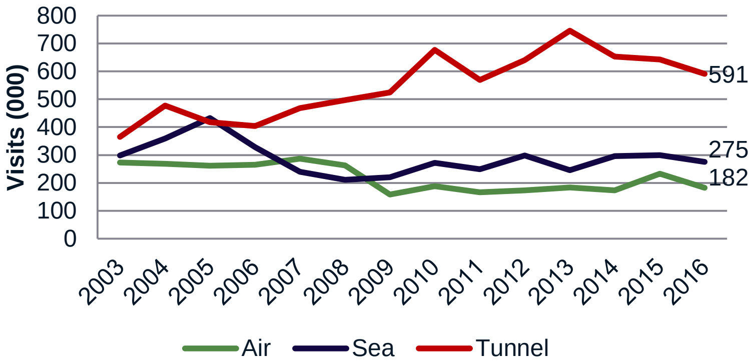
Most Germans travel to the UK by plane.

Access to Britain

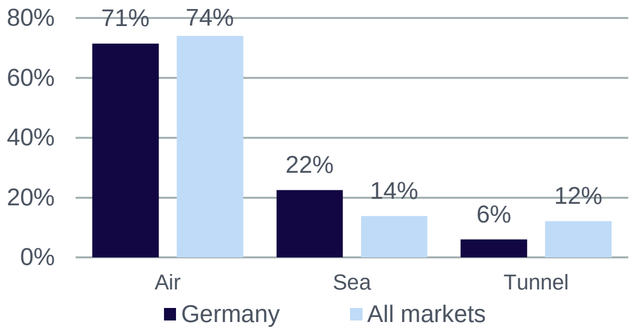
Measure	2016
Weekly aircraft departures	1,263
Weekly seat capacity	180,948
Airports with direct routes in Germany	23
Airports with direct routes in Britain	22

3.1 Access: mode of transport

Visits by mode of transport

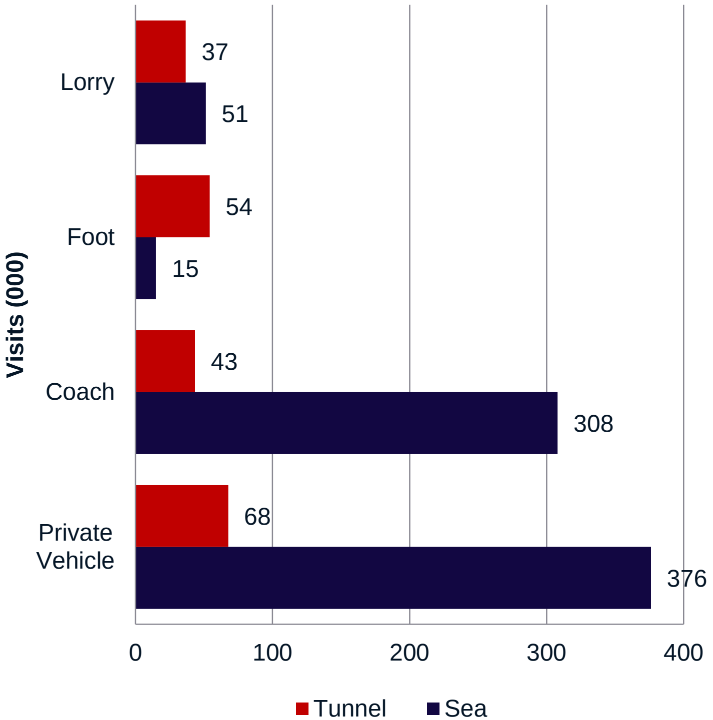


Annual share by mode (2016)



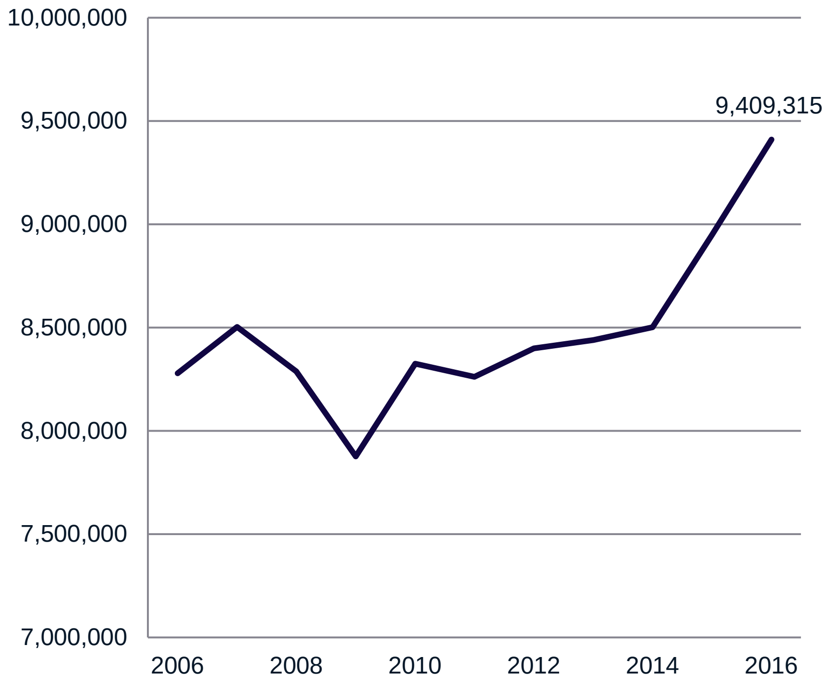
Source: International Passenger Survey by ONS

Sea and tunnel travel (000s) in 2016

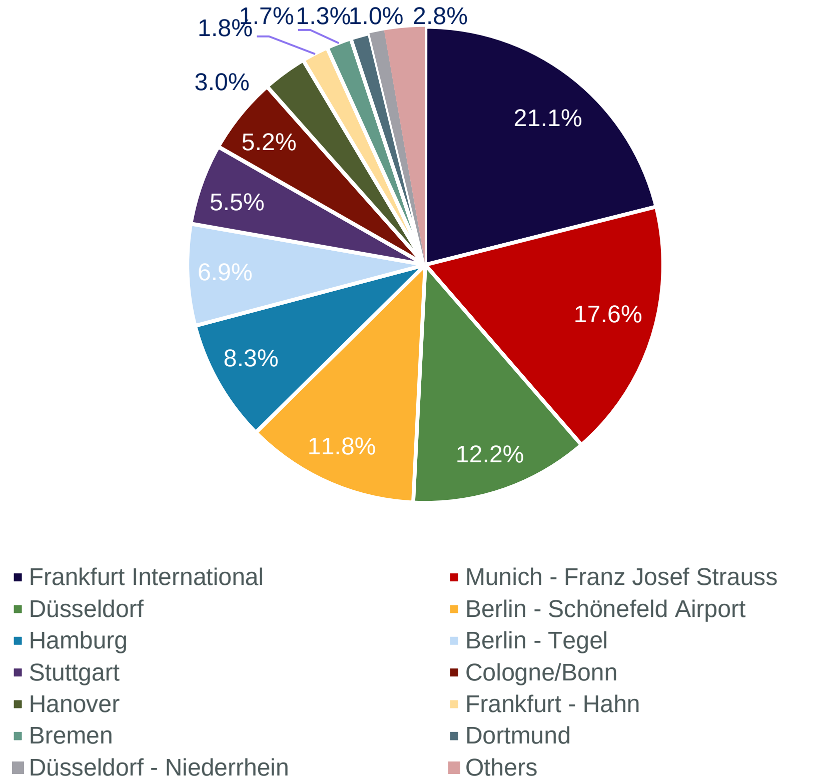


3.1 Access: capacity

Annual airline seat capacity trends



Origin airport annual seat capacity

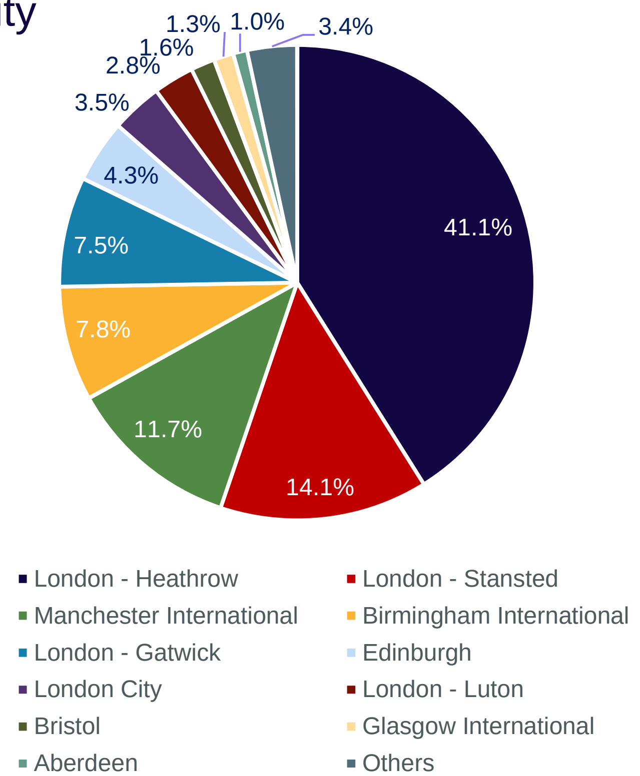


Source: Apex Rdc 2016: non-stop flights only

Airports with less than 1% annual seat share: Nuremberg, Karlsruhe/Baden-Baden, Memmingen, Leipzig/Halle, Friedrichshafen, Muenster Osnabrueck, Dresden, Erfurt , Hamburg Blankenese

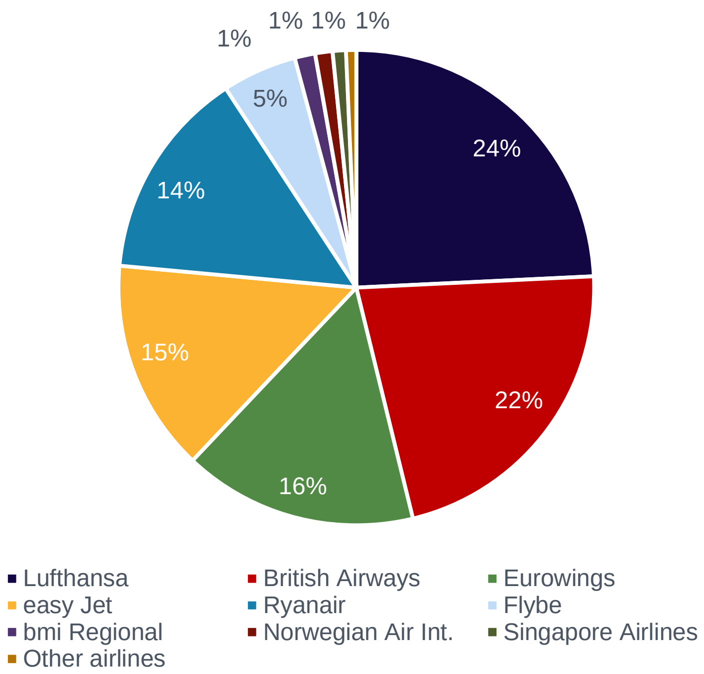
3.1 Access: capacity

Destination airport annual seat capacity



Source: Apex Rdc 2016: non-stop flights only

Airline seat capacity by carrier (2016)

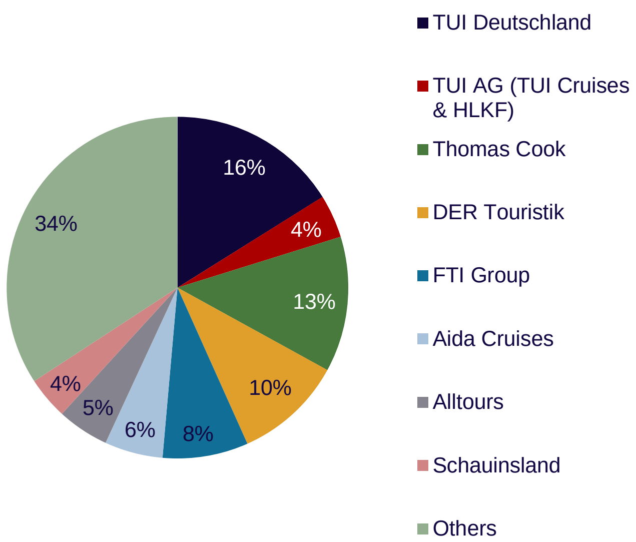


Airports with less than 1% annual seat share: East Midlands, Leeds/Bradford, Liverpool, Newcastle, Cardiff, Doncaster Sheffield, Cornwall Airport Newquay, Jersey, Belfast, London Southend, Guernsey

3.2 Travel trade: general overview

- The German travel market is very mature. The top five players have just over half of the market share. Medium-size and cruise operators have seen strong growth in the past few years.
- For Britain a range of smaller and specialist operators are also important.
- Distribution through retail agencies in Germany is still more important than in other European countries. Especially for bookings of individual elements (e.g. transport and accommodation) online booking channels are also seeing growth.
- Growth rates of OTAs have slowed down in the past two years

Markets share by turnover 2015/16



Source: fvw Dossier, Deutsche Veranstalter 2016, 23rd December 2016 & fvw Dossier, Deutscher Reisevertrieb 2016, 10th June 2015

3.2 Travel trade: German tour operators

Top ten operators in Germany in 2015/16

Top Ten Tour Operators	Turnover €m	Pax
TUI Deutschland	4.400,0	6.000,000
Thomas Cook Group	3.500,0	6.100,000
DER Touristik	2.800,0	5.400,000
FTI Group	2.210,0	3.900,000
Aida Cruises	1.500,0	908,000
Alltours Flugreisen	1.330,0	1.620,000
Schauinsland Reisen	1.100,0	1,370,000
TUI Cruises	821,0	413,752
Phoenix Reisen	327,2	154,058
Hapag-Lloyd Kreuzfahrten	296,7	28,898

The major tour operators with a comprehensive Britain programme are:

DERTOUR

Studiosus

Owned by DER Touristik

WOLTERS REISEN World of TUI

Owned by TUI Deutschland

TROLL TOURS

Partly owned by Thomas Cook

Source: fvw Dossier, Deutsche Veranstalter 2016, 23rd December 2016

3.2 Travel trade: online travel companies

Top ten online travel companies

Company Name	Turnover 2016 (€m)*	Platform(s)
Booking.com	2,000.0	Booking.com
Expedia	1,400.0	Expedia.de, Hotels.com, ebookers.de
HRS	1,300.0	Expedia.de
Unister Travel	1,100.0	Ab-in-den-Urlaub.de, Fluege.de, Reisen.de, travel14.com, Flug24.de
Seven Travel	1,000.0	Weg.de, Tropo.de, Reise.com, Etraveli.com (Seat24.de, gotogate.com, Überflieger.de), Billiger-Mietwagen.de, Mydays.de
Check 24	850.0	Check24.de
Holidaycheck	770.0	Holidaycheck.de
TUI Deutschland	750.0	TUI.com, TUIfly.com, LtuR.com, 1-2-Fly.com, Airtours.de
Edreams Odigeo	730.0	Opodo.de, Govelo.de, Edreams.de
Schmetterling Reisen	717.2	Schmetterling24.de and partner platforms

*Source: fvw Dossier, Deutscher Reisevertrieb 2017, 9th June 2016, *estimated figures*

3.2 Travel trade: German holidays

Public and local holidays

National public holidays in 2017

Date	National Holiday
1 January	New Year's Day
14 April	Good Friday
17 April	Easter Monday
1 May	Labour Day
25 May	Ascension Day
5 June	Whit Monday
3 October	Day of German Unity
31 October	Reformation Day (only in 2017 due to Luther anniversary)
25-26 December	Christmas

Local Holidays in 2017

Date	Local Holiday	Federal State
6 January	Twelfth Day	Baden Württemberg, Bavaria, Saxony-Anhalt
15 June	Corpus Christi	Baden Württemberg, Bavaria, Hesse, North Rhine-Westphalia, Rhineland-Palatinate, Saarland, Saxony-(only certain counties), Thuringia (only certain cities)
15 August	Assumption Day	Bavaria, Saarland (only certain towns)
1 November	All Saints Day	Baden-Württemberg, Bavaria, North Rhine-Westphalia, Rhineland-Palatinate, Saarland
22 November	Repentance Day	Saxony

3.2 Travel trade: practical information

General practical information:

- Business hours are usually 09:00 – 18:00 (with 45 minute lunch break).
- A firm handshake is the most traditional form of greeting. Titles are important and denote respect. You should say Herr or Frau and the person's title and their surname until invited to use their first name. In general, when entering a room, shake hands with everyone individually.
- Check your trip does not coincide with a public holiday as many Germans take a long weekend around these, especially in the spring and summer. Check on whether there is a large trade fair happening in the city you are visiting, as it may be impossible to find a hotel room.
- Punctuality is important. If you expect to be delayed, telephone and offer an explanation. It is considered rude to cancel a meeting at the last minute and it could jeopardize your business.
- Dress code: Business dress tends to be understated and conservative.
- Business Meeting Etiquette: Appointments are mandatory and should be made one to two weeks in advance. An introductory email or letter is essential (not necessarily in German) with relevant background information. Most meetings are formal and initial meetings are used to get to know each other. Meetings tend to adhere to strict agendas, including starting and end times. At the end of a meeting, some Germans signal their approval by rapping their knuckles on the table.
- Communication tends to be formal and you should expect written communication, both to back up decisions and to maintain a record of decisions and discussions. Following the established protocol is critical to building and maintaining business relationships. Once a firm business relationship has been established it is appropriate to relax rules and to become more informal.
- Business often is hierarchical and decision-making is held at the top of the company. Final decisions are translated into comprehensive action steps.
- Make sure your printed material is available in both English and German.

3.2 Travel trade: sales calls

Sales calls

Germany is a large regionalised country with the travel trade concentrated around several cities, often with large distances between them. Therefore, before you embark on what could turn out to be a very costly and time-consuming sales visit to Germany, VisitBritain recommends that you take the following steps:

- Provide the operators you are visiting with a comprehensive information pack (preferably in German) about your product. On your return to Britain ensure that you follow up quickly and renew contact regularly.
- Keep in touch with VisitBritain; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- It is also important to note that a significant number of the key Britain players attend the VisitBritain's ExploreGB workshop, Best of Britain, BIM Marketplace and VisitScotland Expo. Please contact VisitBritain London for details of those attending. Some operators also visit World Travel Market but register with the organisers independently.
- Bear in mind that it is not going to happen overnight! Germany is a huge, complex and very competitive market that requires hard work and commitment. It may take several years to become established.

3.2 Travel trade: hospitality etiquette

Hospitality etiquette

If there is the opportunity it is definitely a good idea to take your German business partner out for a meal – either to build up a relationship or to thank for business given in the past. Here are some practical tips to help you plan this:

- When choosing a restaurant ensure beforehand that credit cards are accepted or bring enough cash. Many German restaurants do not take credit cards (either cash or German debit cards).
- If you order water, you will be asked whether you wish still or carbonated mineral water. It is uncommon to order tap water.
- Service and VAT are included in the menu price in restaurants and bars all over Germany. Still, it is typical to "round up" the amount to some more-or-less round figure. A rule of thumb is to add 5-10%, generally ending with a full Euro amount.
- If you are not paying for all, splitting a bill in Germany is quite common. Simply tell the waiter/waitress when paying what you are paying for, s/he will readily add up your amounts and present you with a personal total, which you should round up, as explained above. The waiter/waitress is likely to come up at the end of the meal and ask "All together?" or, in German “Zusammen?"

3.3 Caring for the consumer

Caring for the consumer

- Very few German visitors expect their British hosts to speak German, with the majority of younger Germans speaking English.
- German visitors are likely to have planned their itinerary in some detail, but younger visitors may be more spontaneous, but all will welcome local recommendations for things to do and see.
- Germans often try to find accommodation that has ‘character’.
- German vegetarians are often impressed by the range of choices on offer in Britain.

Language basics

English	German
Please	Bitte
Thank you	Danke
Yes	Ja
No	Nein
Sorry! (apology)	Entschuldigung!
Excuse me!	Entschuldigen Sie, bitte!
Sorry, I do not speak German.	Entschuldigung, ich spreche leider kein Deutsch.

3.3 Caring for the consumer: German language tips

Language tips for arrival and departure

English	German
Hello	Hallo
My name is…	Ich heiβe…
Welcome to Britain	Willkommen in Großbritannien
Pleased to meet you!	Ich freue mich Sie kennenzulernen.
How are you?	Wie geht es Ihnen?
Enjoy your visit!	Genießen Sie Ihren Aufenthalt!
Goodbye!	Auf Wiedersehen!
Did you enjoy your visit?	Hatten Sie einen schönen Aufenthalt?
Have a safe journey home!	Ich wünsche Ihnen eine sichere Heimreise!
Hope to see you again soon!	Auf ein baldiges Wiedersehen!

3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities)

or trade website (trade.visitbritain.com)

or contact the B2B events team (Email: events@visitbritain.org)

or campaign partnerships team (Email: partnerships@visitbritain.org)

or trade support team (Email: tradesupport@visitbritain.org)

3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specifc-research
- 2017 Inbound Tourism Forecast visitbritain.org/forecast
- Britain‘s competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about Germany or other inbound markets browse

our markets & segments pages or (visitbritain.org/markets-segments)

our inbound research & insights or (visitbritain.org/inbound-research-insights)

contact us directly
(Email: research@visitbritain.org)

3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain https://www.visitbritain.org/understanding-international-visitors
- Technology and social media https://www.visitbritain.org/understanding-international-visitors
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more visitbritain.org/visitor-characteristics-and-behaviour
- Food & drink research visitbritain.org/inbound-food-drink-research

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To find out more about Germany or other inbound markets browse

our markets & segments pages or (visitbritain.org/markets-segments)

our inbound research & insights or (visitbritain.org/inbound-research-insights)

contact us directly
(Email: research@visitbritain.org)

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Market and Trade Profile: Germany