

GERMANY

Market Profile

82.6
million



German
population

£1.5
billion



Market
value to UK

Germany is an important market to England and the National Parks. It is recommended that businesses get to know this market better to benefit from the high number of visitors from Germany.

33% of spend is in London and **49%** across the rest of England

German market overview



Germans like taking holidays and **they like England**



Most German workers receive **between 28 and 30 days** annual leave



The UK's **3rd highest inbound source market** (2016)



The UK's **2nd biggest spenders** at **£1.5 billion** across the UK (2016)



8% or 278,000 visited a National Park when holidaying in England

43%

of all German visits were taken in England, outside London

530,000

holiday visits were taken in England, outside London

3,552,000

holiday nights were taken in England, outside London

Source: VisitEngland Insights



**The English National Park
Experience Collection**

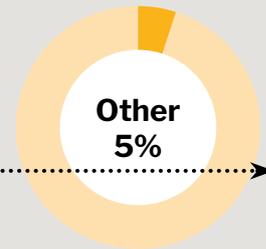
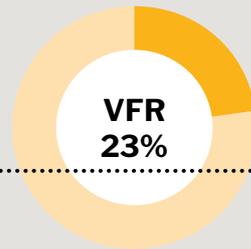
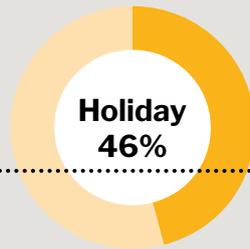
GERMANY - MARKET PROFILE
www.nationalparks.gov.uk/discoverengland



German Market	Visits (000s)	Nights (000s)	Spend (£m)
2016	3,341	19,273	1,490
Share of UK total in 2016	8.9%	7.0%	6.6%
Rank out of UK top markets	3	3	2

Source: International Passenger Survey 2016

REASON FOR VISIT



Key Takeaways

- **Friends, family and colleagues** are the **#1 influence** for destination choice
- Germans tend to start thinking about their trip to Britain **6 months prior**
- **75% of visitors** were repeat customers in 2015

How they Book

- **33%** of all trips were booked through a traditional **travel agent** (2016)
- **37%** booked their holidays, or parts of it, **online** (2016)
- **One-in-five holiday visits** were bought as part of a package tour (2016)
- **Peak booking:** Jan-Mar and Sep-Nov
- **Peak travel:** Apr-Jun and Jul- Sep
- Short trips of 1-3 nights and 4-7 nights are the most popular

Market Segments and Attributes

The English National Park Experience Collection prioritises two segments:

- **OUTDOOR ENTHUSIASTS:**
Nature lovers who love active, outdoor breaks with the family. Discovery and learning are an integral part of their holidays
- **MATURE EXPERIENCE SEEKERS:**
'Young at heart' with greater freedom, money and time to spend

These two segments really enjoy the following activities

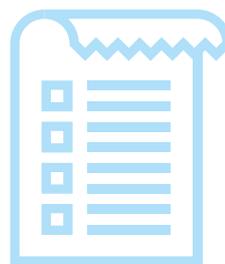
- **More than half** of holiday visits involve time in a park or garden
- **Built heritage sites, and castles,** are important attractions for visitors
- **Walking in the countryside** or coast is a popular activity with visitors



Travel Trade

- **The German travel trade market is very mature:** there are a few big players dominating the market but also a fair number of specialist operators including sustainable tour operators with comprehensive programmes for Britain.
- Large tour operators research their main season programmes **between April and June** the year preceding promotion, with off-season/city break operators doing their research in **March and April**.
- **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.
- **The top five players have just over half of the market share.** Medium-sized and cruise operators have seen strong growth in the past few years. **For Britain a range of smaller and specialist operators are also important.**

Access the latest performance on visitors, holidaymakers and revenue from Germany visit the VisitBritain/VisitEngland web site: <https://www.visitbritain.org/markets/germany>



Top Ten Tour Operators

1. TUI Deutschland
2. Thomas Cook Group
3. DER Touristik
4. FTI Group
5. Aida Cruises
6. Alltours Flugreisen
7. Schauinsland Reisen
8. TUI Cruises
9. Phoenix Reisen
10. Hapag-Lloyd Kreuzfahrten

Top Ten Online Travel Agencies

1. Booking.com
2. Expedia
3. HRS
4. UnisterTravel
5. SevenTravel
6. Check24
7. Holidaycheck
8. TUI Deutschland
9. Edreams Odigeo
10. SchmetterlingReisen



What do Germans think of the English National Park Experience

German visitors will participate in a wide range of activities and experiences during their trip. They enjoy travelling by car, coach or on foot. Whilst here they love trying local food and visiting famous buildings and monuments and visiting parks and gardens.

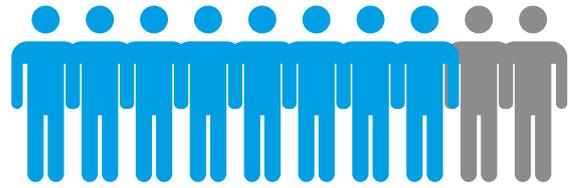
I'd love to meet a Yorkshire bloke and have a pint with him and find out what his life is like

I know I have been talking about history but to see the different wildlife in a watery national park ...that would be great

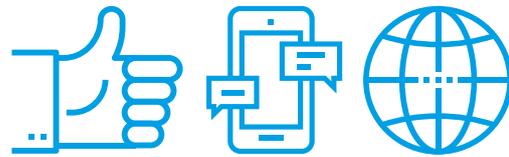
This idea of the monks and then to the mining history is really interesting ... it is this connection with the land theme - its so different and so England

That sounds interesting, like a different side of England that you might not know. This landscape looks amazing. Very beautiful. I could immediately travel there. This landscape, this lake, I'd like to discover this.

Target German visitors through social media



Over 85% of all adult Germans are online, but only about half German online users are on social



Facebook is the leader of German social media, with a market share of over 90% and more than 27 million users, 41% of whom use the site weekly

Most frequently accessed websites are

Google



YouTube



amazon

facebook



Set up your profile on German social media platforms. German holidaymakers use a variety of digital sources to inspire them and help them choose a holiday destination. **More than half use search engines, while 42% use price comparison websites.**



Top Tips for targeting German Visitors

Guide Books: One in three Germans consult travel guidebooks. If you are interested in targeting the German market, buy copies of popular guide books to see if you are listed or featured. The easiest way is to purchase them online. If you are listed, then keep the editor/publisher up-to-date with any new product developments and services. If you're not listed but feel you have an interesting product that would really appeal to German holidaymakers, contact the editor/publisher with information for possible inclusion in the next update of the guide.

Language is important: Promotions and information should be in German. German holidaymakers plan well and search for detailed information when organising their holiday. Although many of them speak very good English, they like detailed information to be available in German. If you're serious about targeting the German market, you should translate some pages on your website and also consider translating other relevant promotional material. If you or your staff can speak German, even better.

Many group tour operators will supply a tour manager or guide to accompany customers and assist with translation.

Word of mouth: Friends, family and colleagues are the most important influences on destination choice. German travellers prefer to share their experiences in a personal manner with friends and family.

Working with the Travel Trade: The travel trade is looking for new bookable, commissionable products and experiences outside of London. Just as you need to make it easy for your customers to find and book you also need to make it easy for your potential or actual travel trade partner to work with you rather than your competitors. You can do this by making your products and services "bookable". Remember Tour operators work on a planning and contracting cycle of 12-18 months. April onwards is a critical time to meet with and present new commissionable product.

Work with us:

To find out more email Discover England's National Parks, check our website or contact your nearest National Park

experiencecollection@nationalparks.gov.uk

www.nationalparks.gov.uk/discoverengland



92% of departing Germans are either 'Very' or 'Extremely' likely to recommend Britain for a holiday or short-break

