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Market Insights

Germany

Market insights

Introduction

This section of the toolkit will help you to better understand your customer – essential no matter how small or big your operation is, and no matter whether you are experienced or new to developing visitor experiences.

Read the profiles of the domestic market and of Ireland's four main overseas markets to understand who the customer is and what they like to do.

Over these pages, we profile the German market.



International markets

Before ever we heard of Covid-19, over 70% of our international tourism revenue came from four markets: Great Britain (GB), United States (US), Germany and France.

While international travel will take some time to recover, it is likely that when it does these markets will continue to play a key role for Ireland.

Recovery will take place within a very competitive landscape but it's all to play for, with the majority of holidaymakers in the early stages of holiday planning, either just thinking through ideas, or starting to research.

The opportunities are there – make sure your experience appeals to your target customer and that it is visible and bookable in the online channels they use for holiday planning.

Let's look at the German market.



Germany

10 facts about the German market

01.

Germany is our third largest market (728,000 tourists in 2019) and our most important non-English speaking market.

02.

They are active tourists, exploring historical sites and engaging in multiple events/activities while here. Hiking/cross-country walking is their most popular activity in Ireland.

03.

When first thinking of a holiday, sources of information include internet searches such as Google (used by 66%), price comparison websites (used by 53%), paper or online travel guidebooks (used by 47%), recommendations by friends and family (43%), accommodation websites (42%) and traveller reviews such as TripAdvisor (used by 40%).

04.

Once the decision to visit Ireland is made, 70% use the internet, 32% use word-of-mouth, 35% use guidebooks (more than many other markets) and 11% use social media.



05.

Three quarters of holidaymakers will plan their trip 3-4 months in advance.

06.

German holidaymakers stay here an average of 7.5 nights.

07.

Over half are under 35.

08.

36% of them are here as a couple.

09.

92% are ABC1 holidaymakers.

10.

33% are on a repeat visit.



What do German tourists do when in Ireland?



92% visit sites of historical interest

- ✓ 65% Churches and cathedrals
- ✓ 61% Heritage / visitor centres
- ✓ 60% Historic houses / castles
- ✓ 49% Monuments
- ✓ 39% Museums /galleries
- ✓ 32% Ancient Celtic sites



83% engage in pastimes/events

- ✓ 56% National parks and forests
- ✓ 42% Shopping
- ✓ 41% Gardens
- ✓ 9% Festivals / events / concerts
- ✓ 2% traced roots or genealogy



58% participate in activities

- ✓ 42% Hiking / cross-country walking
- ✓ 4% Cycling
- ✓ 4% Water-based activities
- ✓ 1% Golf
- ✓ 1% Fishing
- ✓ 1% Equestrian

Experiences that German visitors are 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 guidebooks	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%

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 guidebooks – 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.

The information presented here is sourced from Fáilte Ireland and Tourism Ireland.

See *German Market Profile* and *Targeting German Holidaymakers* and *German Market Profile 2019*.

Although many Germans can speak English, they really appreciate it when information is available in their own language – guided tours – interpretation materials – instructions, etc.



German tourists have a deep understanding of the relationship between price and value. Consider encouraging advance bookings with price inclusions or added value.



Special interests are common in Germany such as garden tours, farm visits and religious visits.

