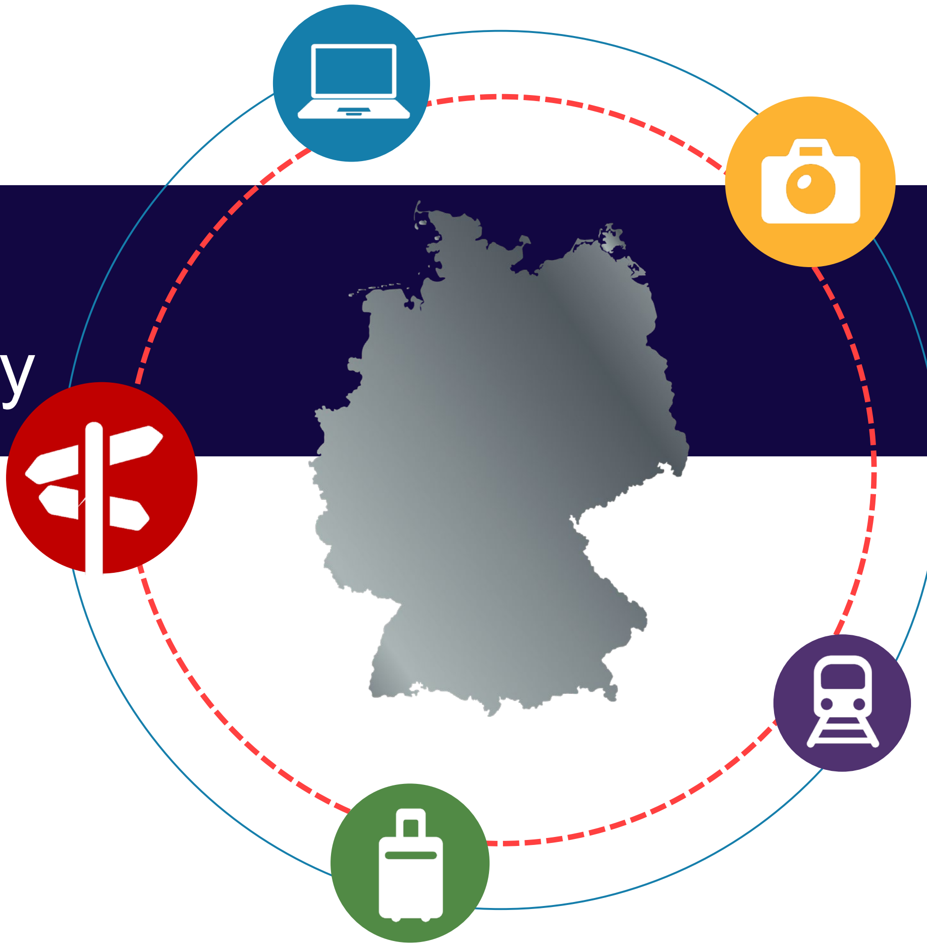
Market and Trade Profile: Germany



February 2021

Overview

- **'Chapter 1: Inbound market statistics'** provides insights on key statistics about German travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **'Chapter 2: Experiences and perceptions'** features details about what visitors from Germany are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by Germans in general are also highlighted.
- **'Chapter 3: Understanding the market'** takes a close look at consumer trends in Germany, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach German consumers are indicated, too.
- **'Chapter 4: Access and travel trade'** shows how people from Germany 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 in the appendix.

Please note that most of this report refers to the market conditions for travel from Germany to the UK prior to the COVID-19 pandemic and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available here: visitbritain.org/inbound-covid-19-sentiment-tracker.

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Executive summary

1: Inbound market statistics

Chapter summary

- Despite a general slowdown in 2020 due to the Covid-19 outbreak, the German outbound market is forecast to exceed 150 million overnight trips abroad by 2030. Germans took the second most outbound overnight trips in 2019 in the world – only US travellers took more. Germans rank globally in 3rd place for international tourism expenditure, following Chinese and US travellers, with US$93.2bn in 2019.
- Germany was the third largest inbound source market for the UK for volume and value, with 3.2m visits and a record £1.6bn spent by German residents in the UK in 2019.
- 46% of all visits to the UK were for holidays in 2019, followed by visiting friends and relatives (27%) and business (22%).
- The German source market has an above-average regional spread and tends to feature more visits to rural and coastal areas.

2019: Record £1.6bn spent in the UK

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

2: Experiences and perceptions

Chapter summary

- Dining in restaurants, shopping and sightseeing famous monuments/buildings feature highest on the list of most German visits to the UK. Going to the pub is also popular, and almost one in three visits include socialising with British locals.
- Many German holiday visitors like to spend time outdoors e.g. in a park or garden, a national park or enjoy walking in the countryside or by the coast.
- 96% of German visitors would recommend Britain for a holiday or short-break.
- Germans rate the UK highly for contemporary culture, culture overall, built heritage, vibrant cities and sports, and associate music and museums most strongly with Britain.

Germans rank the UK 4th for contemporary culture out of 50 countries in 2020

Source: International Passenger Survey by ONS, Anholt Nation Brands Index powered by Ipsos 2020

3: Understanding the market

Chapter summary

- Germany has the second oldest population in Europe.
- Holidays tend to be an important part in the life of German people. More than one in four holiday trips (5 nights +) in 2019 was a domestic holiday, but they are keen outbound travellers, too. The outlook for Germany holiday trips in 2020 was positive before the COVID-19 pandemic, and shows good recovery prospects for 2021.
- 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. About one in five book their travel arrangements in the month leading up to their departure.
- In December 2020, more than three quarters of German leisure trip intenders (76%) expected to take a trip within Europe in 2021.
- Friends, family and colleagues are the most important influences on destination choice. Germans tend to mix on- and offline sources.

Culture

Most important draw for German visitors

Source: CIA World Factbook 2020, Oxford Economcis, FUR Reiseanalyse 2020, FUR Reiseanalyse 2021 preliminary results 26 January 2021, VisitBritain/IPSOS 2016, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021

4: Access and travel trade

Chapter summary

- It is possible to reach many destinations in the UK 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.
- Annual airline seat capacity from Germany to Britain has grown in recent years up to 2017 and remained roughly stable in 2018 before decreasing slightly in 2019. Many airlines operate flights from Germany to the UK with Lufthansa being the largest carrier followed by British Airways. The pandemic severely impacted flight capacity and traffic via sea and the Channel Tunnel in 2020.
- The German travel market is very mature; there are a few big players dominating the market but also a number of small specialist operators with comprehensive Britain programmes.
- Although retail agencies are still more important in Germany than in many other European countries, they are now increasingly facing strong competition from Internet travel portals.

>770,000

Monthly average direct airline seat capacity from Germany to the UK in 2019

Source: Apex, FUR Reiseanalyse 2020

Chapter 1:

Inbound market statistics

1.1 Key statistics

Key insights

- Germany is Britain's third largest source market in terms of visits and visitor spending worth a record £1.6 billion.
- German holiday visitors set a new record at £863 million (making up 55% of total German visitor spend) in 2019.
- Visits from Germany to friends and relatives residing in the UK set new records with 874,000 such visits worth £260 million in 2019.
- Business visits reached a new low this century at 720,000 visits.
- London is the leading destination for a trip to Britain but the South East, Scotland and the South West are also popular.
- German visitors to London set new records in both spend and visits, with 1.5 million visits worth £707 million.
- More than three in five holiday visits to the UK are repeat visits.*
- Holiday visits from Germany have an above average propensity to feature rural and coastal areas of Britain.

Germany is the UK's **3rd largest** inbound market for both spend and visits

Source: International Passenger Survey (IPS) by ONS, Oxford Economics; *excluding UK nationals, based on 2015 IPS data

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	93.2
Global rank for international tourism expenditure	3
Number of outbound overnight visits (m)	115.8
Most visited destination	Austria

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+1%	-10%	+17%
2009	3,188	19,865	1,337
2010	2,938	17,707	1,173
2011	2,892	18,258	1,221
2012	3,029	16,701	1,246
2013	3,030	18,062	1,354
2014	3,180	19,138	1,457
2015	3,150	17,982	1,333
2016	3,297	18,857	1,462
2017	3,243	18,031	1,503
2018	3,170	17,028	1,483
2019	3,233	17,824	1,567
Share of UK total in 2019	7.9%	6.2%	5.5%

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

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	3,233	+2%	3
Nights (000s)	17,824	+5%	2
Spend (£m)	1,567	+6%	3

Between January and March 2020, the UK welcomed 453,000 visits from Germany worth £172 million (down 33% and 28% respectively compared to January to March 2019). The COVID pandemic impacted visitation already at this time.*

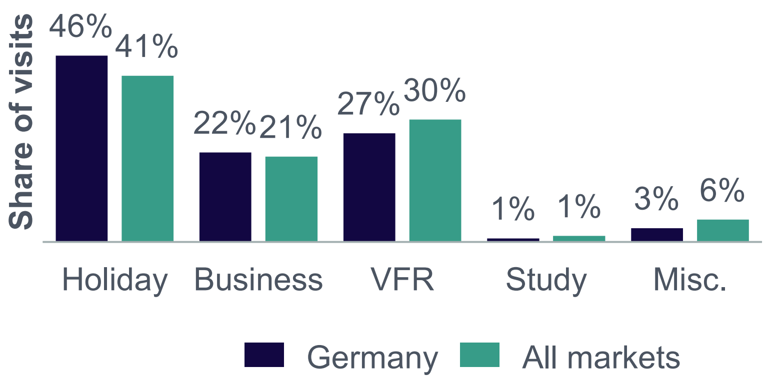
Source: International Passenger Survey by ONS, *provisional data for January-March 2020
**small base

Nights per visit, spend

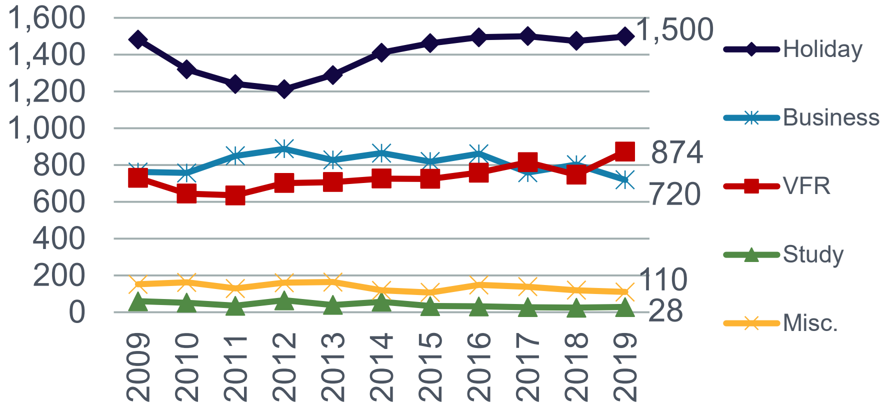
Averages by journey purpose in 2019	Nights per visit	Spend per night	Spend per visit
Holiday	6	£97	£576
Business	4	£136	£517
Visiting Friends/ Relatives	6	£48	£297
Study**	19	£52	£1,006
Misc.**	3	£133	£382
All visits	6	£88	£485

1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trend (visits 000s)



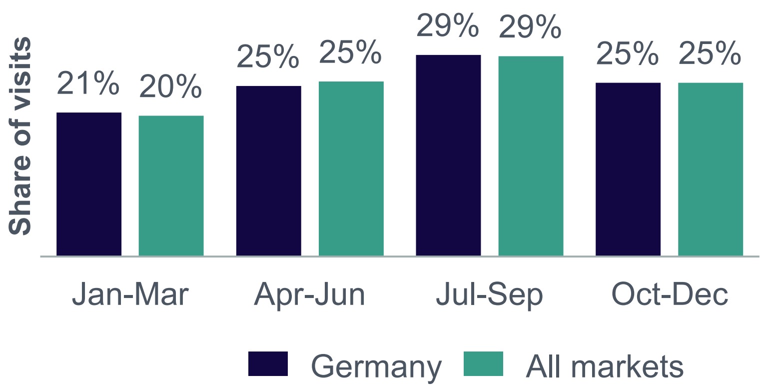
- 46% of all visits to the UK from Germany were made for holiday purposes, followed by 27% for visiting friends and relatives (VFR) in 2019. More than one in five German visits (22%) to the UK are made for business purposes.
- In 2019 the volume of German holiday visits almost matched the 2017 record with 1.5 million such visits. German holiday visitors set a new visitor spending record at £863 million (making up 55% of total German visitor spend) in 2019.

- In 2019 the number of business trips continued falling to its lowest level since the 1990s – it was 440,000 short of the record established in 2006 prior to the financial crisis. Despite the year-on-year decrease in volume, German business visitor spend grew slightly in 2019, but still remains behind the 2017 record.
- German visits to friends and/or relatives who reside in the UK had seen steady volume growth in 2012-2017 before a decline in 2018. 2019 saw new record levels for VFR visits and spend, with 874,000 such visits worth a record total of £260 million spent in the UK.

Source: International Passenger Survey by ONS

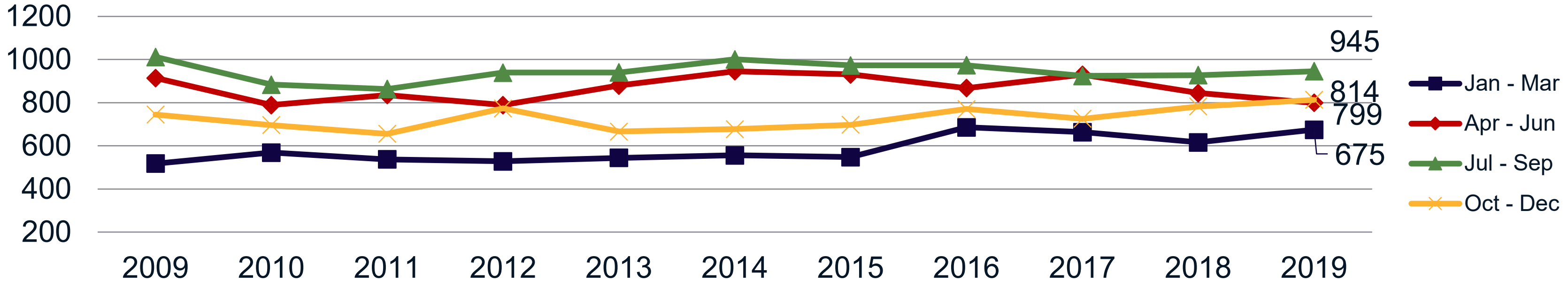
1.1 Key statistics: seasonality

Seasonality 2019



- 29% of visits from Germany to the UK were made in the third quarter of 2019. A further quarter of visits were made in the shoulder season (April-June and October-December). This seasonal spread follows the all-market trend.
- The last quarter of 2019 set a new record in visits with 814,000 visits from Germany, worth a total of £385 million.
- The volume gap between the final quarter and the second quarter reduced in the last few years.
- All but the second quarter saw increases in visit volume in 2019.

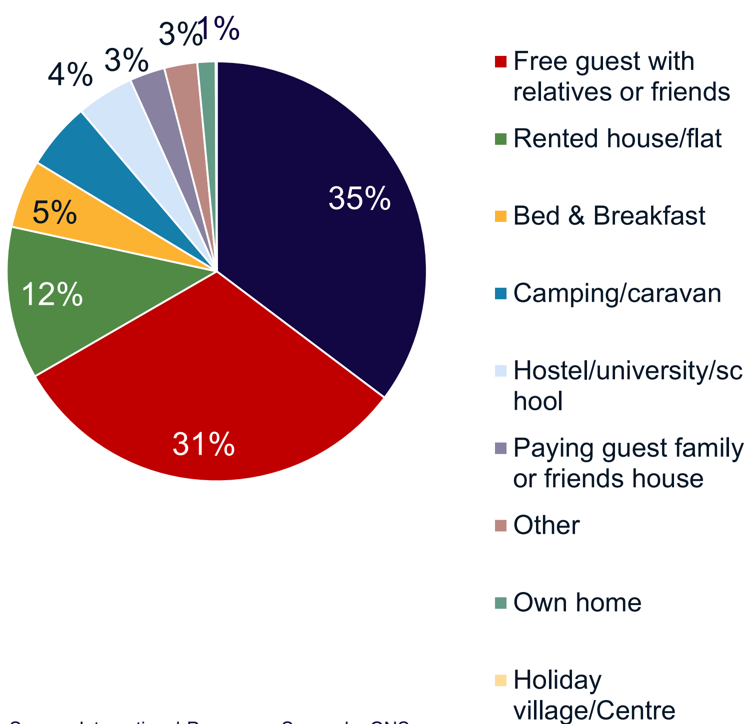
Seasonality trend (visits 000s)



Source: International Passenger Survey by ONS

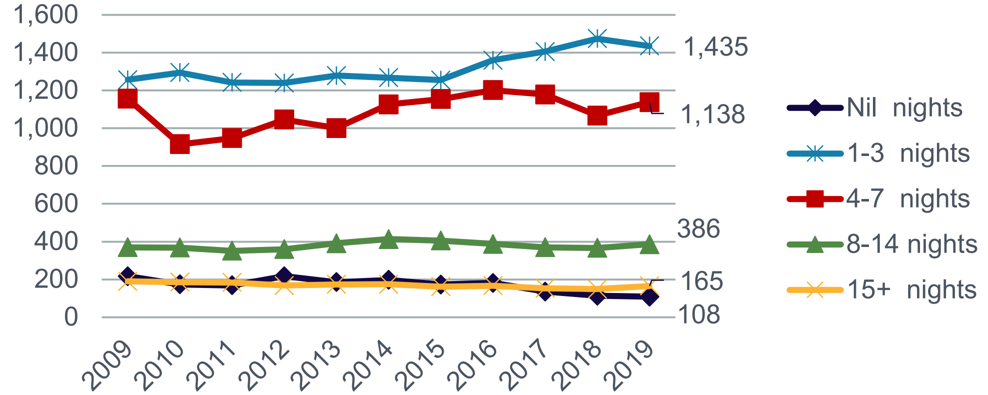
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Source: International Passenger Survey by ONS

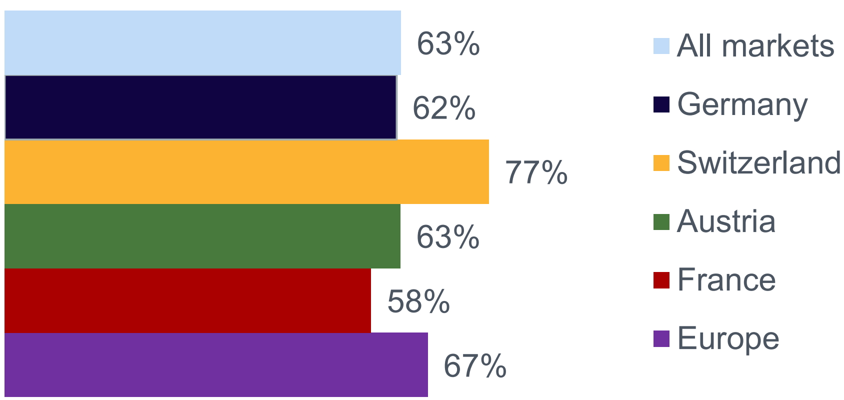
Duration of stay trend (visits 000s)



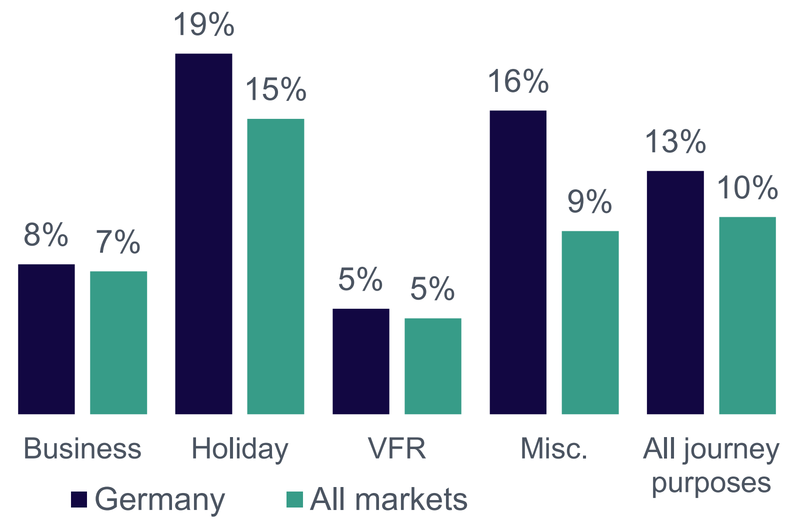
- Short trips of 1-3 nights and 4-7 nights are the most popular duration of stay from Germans.
- Two forms of accommodation dominate the picture with 'hotel/guest house' being the most popular (35% of nights) thanks to a large volume of holiday and business visitor nights. 31% of nights are spent as a free guest at relatives' or friends'. The majority of these are spent by those on a VFR trip (78%). Rented houses or flats are also popular, comprising 12% of the German nights spent in the UK in 2019.

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- 62% of holiday visits from Germany to the UK (excluding UK nationals) were made by repeat visitors. These repeat visitors came about 5 times on average in the past ten years (an average visit frequency compared to other markets) and spent £2,476 in the UK in total in the past ten years. The highest proportion of repeat visitors were among those coming for business purposes (92%) or to visit friends or relatives who live in the UK (88%).
- Almost one in five German holiday visits to the UK are bought as a package holiday.**

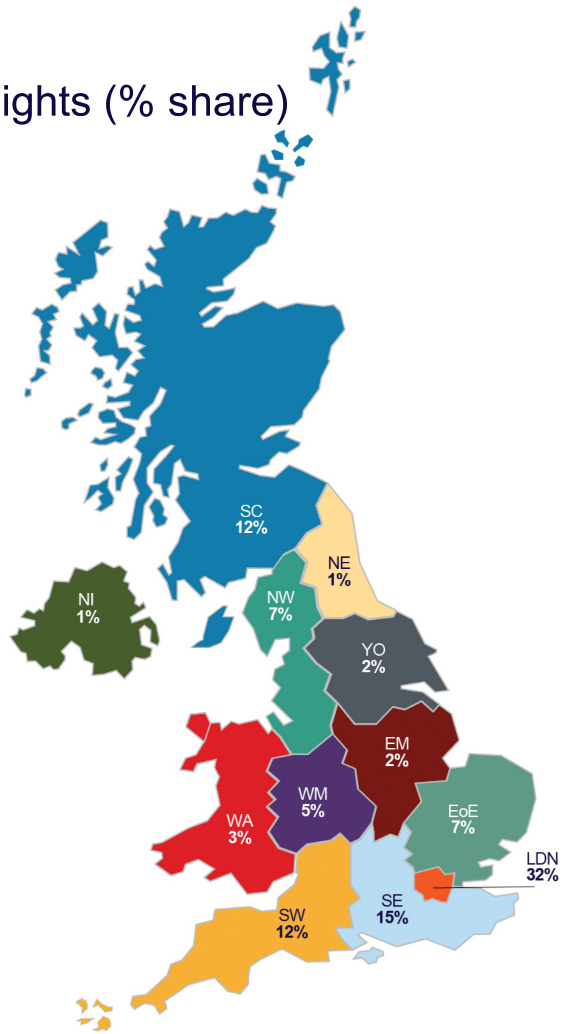
International Passenger Survey by ONS. *2015, excluding British nationals; **See definition of a package holiday in appendix

1.2 Getting around Britain

Annual visits to the UK (2019)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	17,824	3,233	1,566
Scotland (SC)	2,228	322	196
Wales (WA)	564	85	46
Northern Ireland (NI)	150	13	13
London (LDN)	5,697	1,507	707
North East (NE)	155	43	14
North West (NW)	1,173	260	81
Yorkshire (YO)	275	63	19
West Midlands (WM)	890	201	66
East Midlands (EM)	437	91	22
East of England (EoE)	1,318	156	57
South West (SW)	2,192	309	132
South East (SE)	2,689	515	201
Nil nights (Nil)	N/A	108	8

Nights (% share)



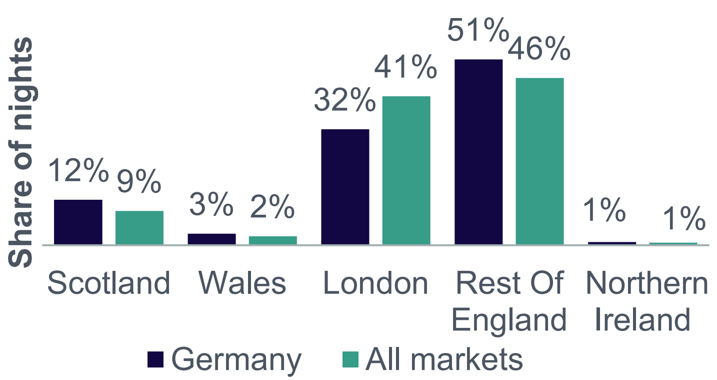
Source: International Passenger Survey by ONS

1.2 Getting around Britain: regional spread and top towns & cities

Top towns and cities visited 2019

Town	Visits (000s)
London	1,507
Edinburgh	194
Manchester	131
Birmingham	79
Brighton / Hove	74

Regional spread 2019

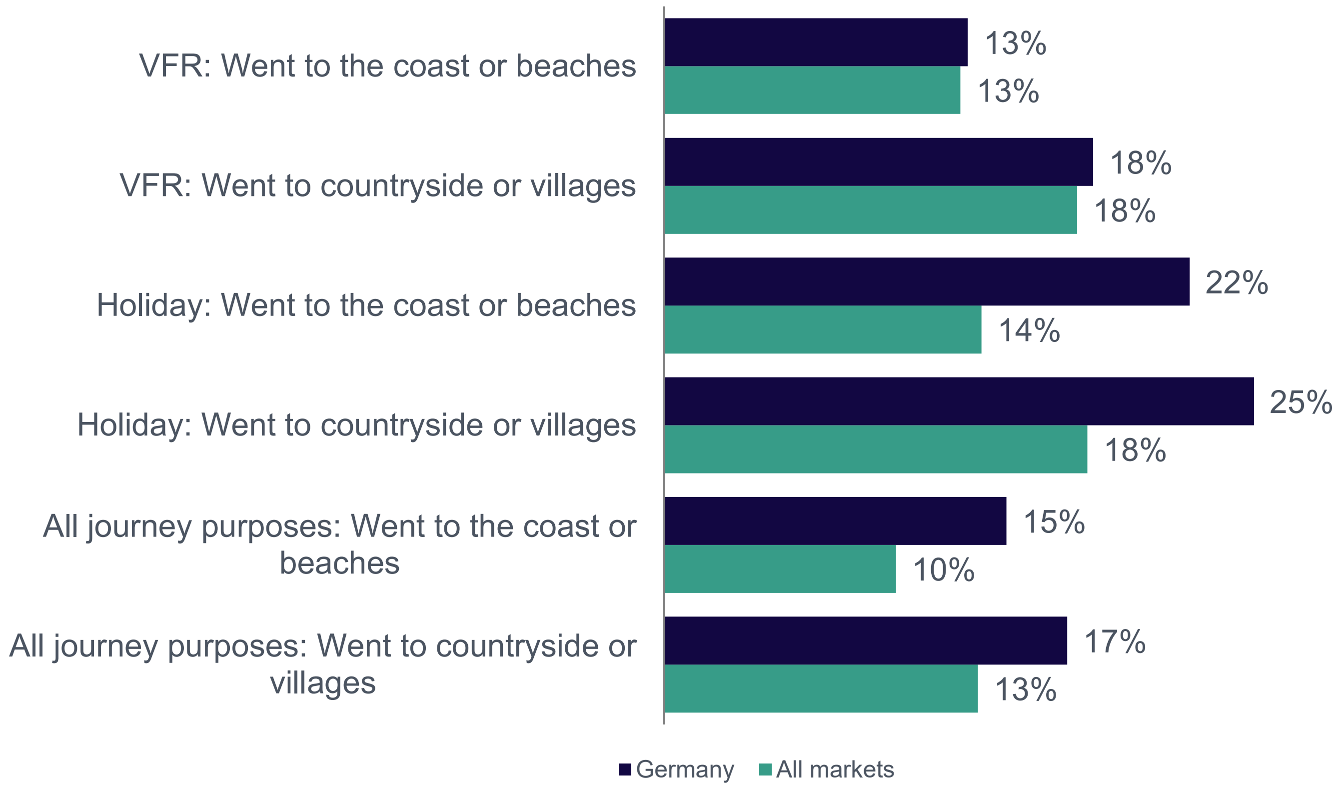


- German visitors show an above-average spread across the UK's nations and regions based on nights spent in the UK. London is the leading destination for a trip to Britain but Scotland, South East and South West are also popular. Germany was the top market for the South West in visits in 2019.
- German visitors to London set new records in both spend and visits, with 1.5 million visits to London and £707 million in spending in 2019.
- Visits to the North West of England also set a new record with 260,000 visits, worth £81 million.
- 515,000 visits from Germany to the South East set a new record with visitor spending of £201 million.
- The potential of regional spread from German holiday visitors is very positive. Surveyed in September 2020, German international travellers who are interested in visiting Britain showed strong interest in visiting London (68%), Scotland (58%), Wales (26%) and England outside London (21%) (multiple answers permitted).
- German visits have an above average propensity to feature rural and coastal areas of Britain.

Source: International Passenger Survey by ONS, FUR Reiseanalyse 2016, ICM/VisitBritain September/October 2020

1.2 Getting around Britain: visits to coast, countryside and villages

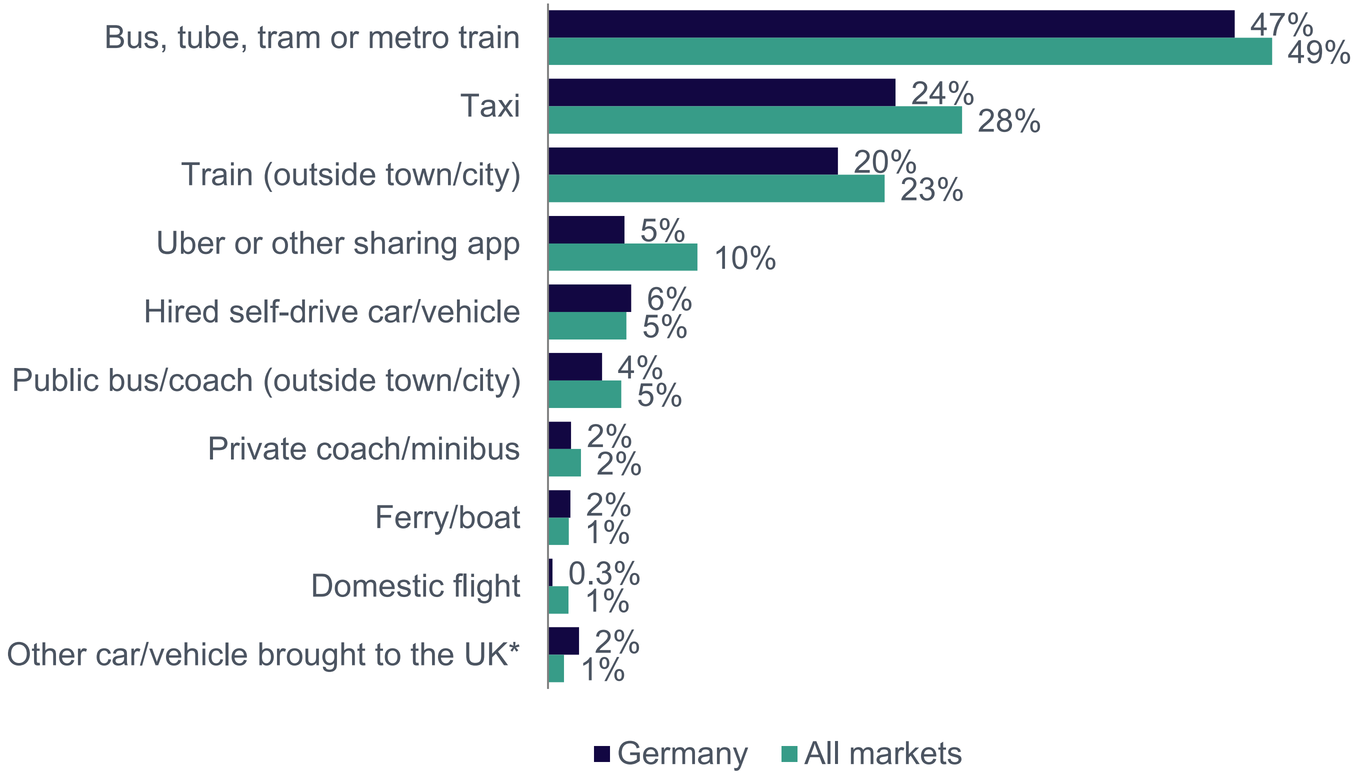
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

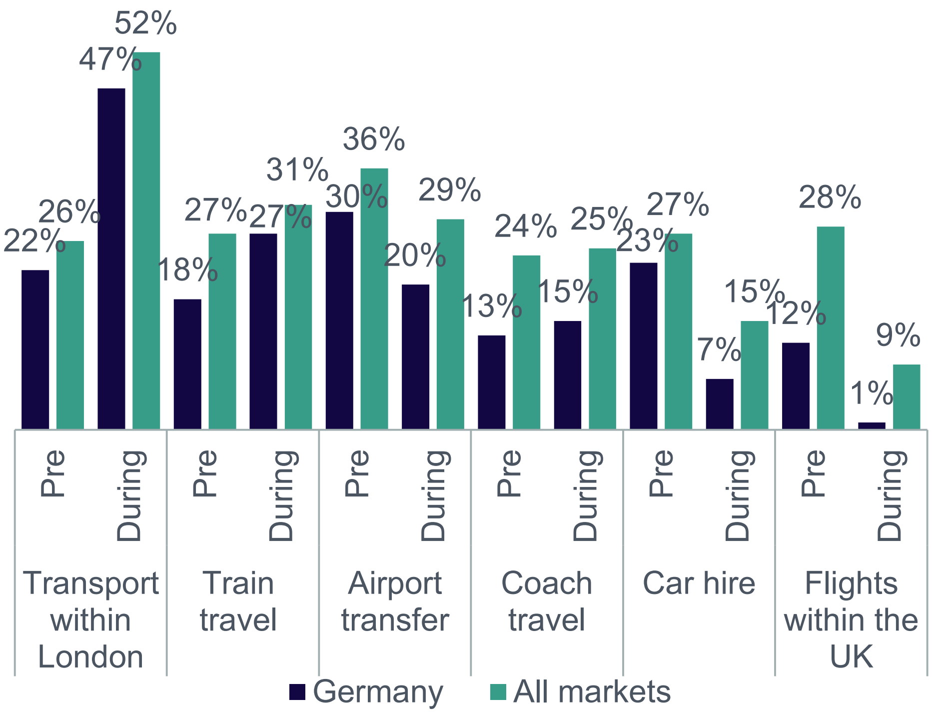
Propensity to use internal modes of transport



Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for 'car/vehicle you/group brought to the UK

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



German visitors have a slightly below average propensity to take taxis or public transport to get around towns/cities as well as outside of towns, except for ferries for which they slightly over-index.

They tend to be more likely to either bring their own or rent a car/vehicle, or to hire a self-drive vehicle while on tour in the UK, compared to the all-market average.

Germans are also less likely to book transport services prior or during a trip in Britain. Transport within London was the most commonly booked mode of transport, usually booked while in the destination. Among transport services booked beforehand, airport transfers were the most common followed by car hire and transport within London.

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

1.3 Visitor demographics

Visitor characteristics

- The age cohorts of 25-34, 35-44 and 45-54 made up the largest volume of visits from Germany to the UK. The volume of visits made by those aged between 55-64 and 25-34 has seen the largest growth in the 10-year period to 2019. Highest spend per visit was registered for the age cohorts of 55-64 and 65+: £596 and £543 respectively.
- There is a tendency of more men visiting the UK than women, especially among business visitors.
- A high proportion of holiday and business visitors from Germany are also German nationals; 21% of VFR visitors were British nationals in 2018.
- Close to two in five visits are by travellers on their own, whilst almost a third visited with their spouse or partner.
- A large proportion of those visiting the UK reside in North Rhine-Westphalia followed by Bavaria, Baden-Württemberg and Hessia.

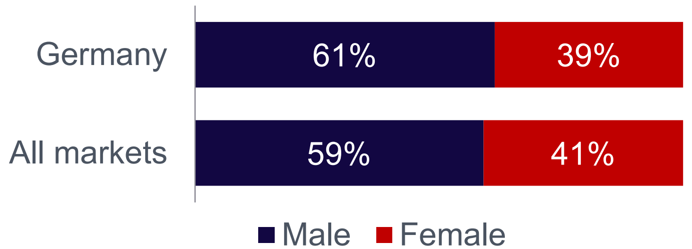
Source: International Passenger Survey by ONS

38%

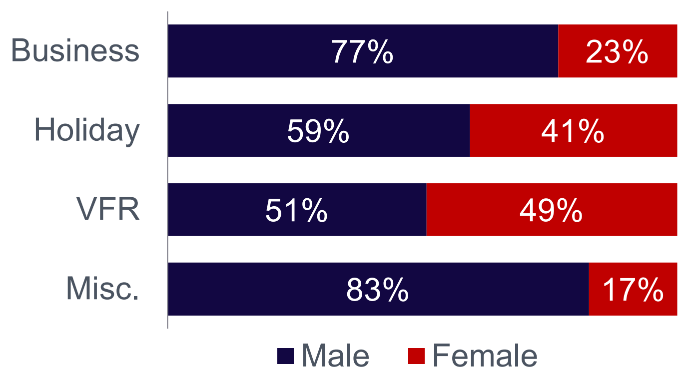
of German visitors visited the UK as solo travellers

1.3 Visitor demographics: gender and age groups

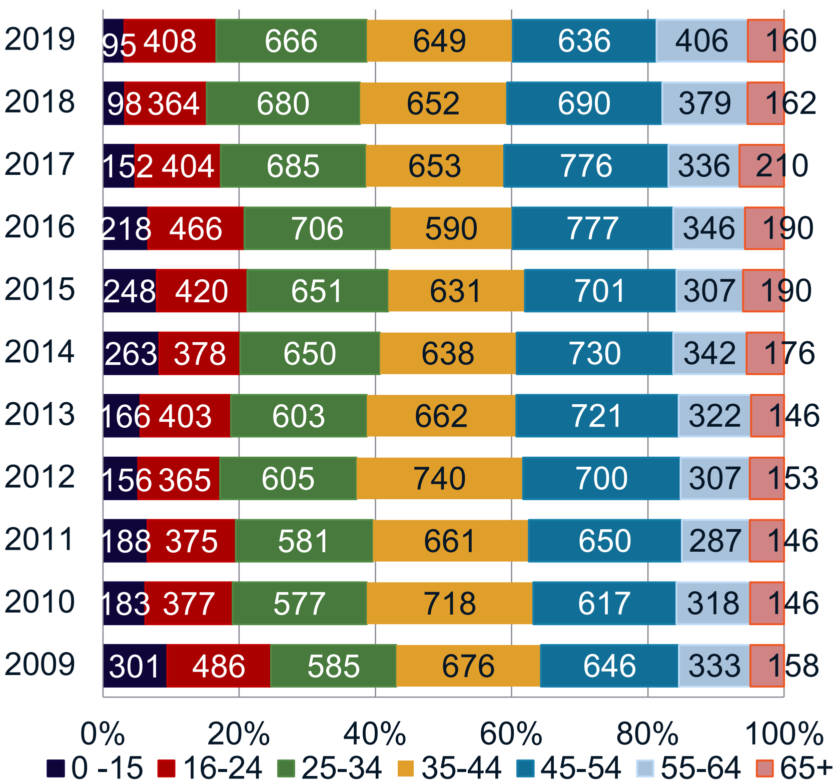
Gender ratio of visits (2019):



Gender ratio of visits from Germany by journey purpose (2019):



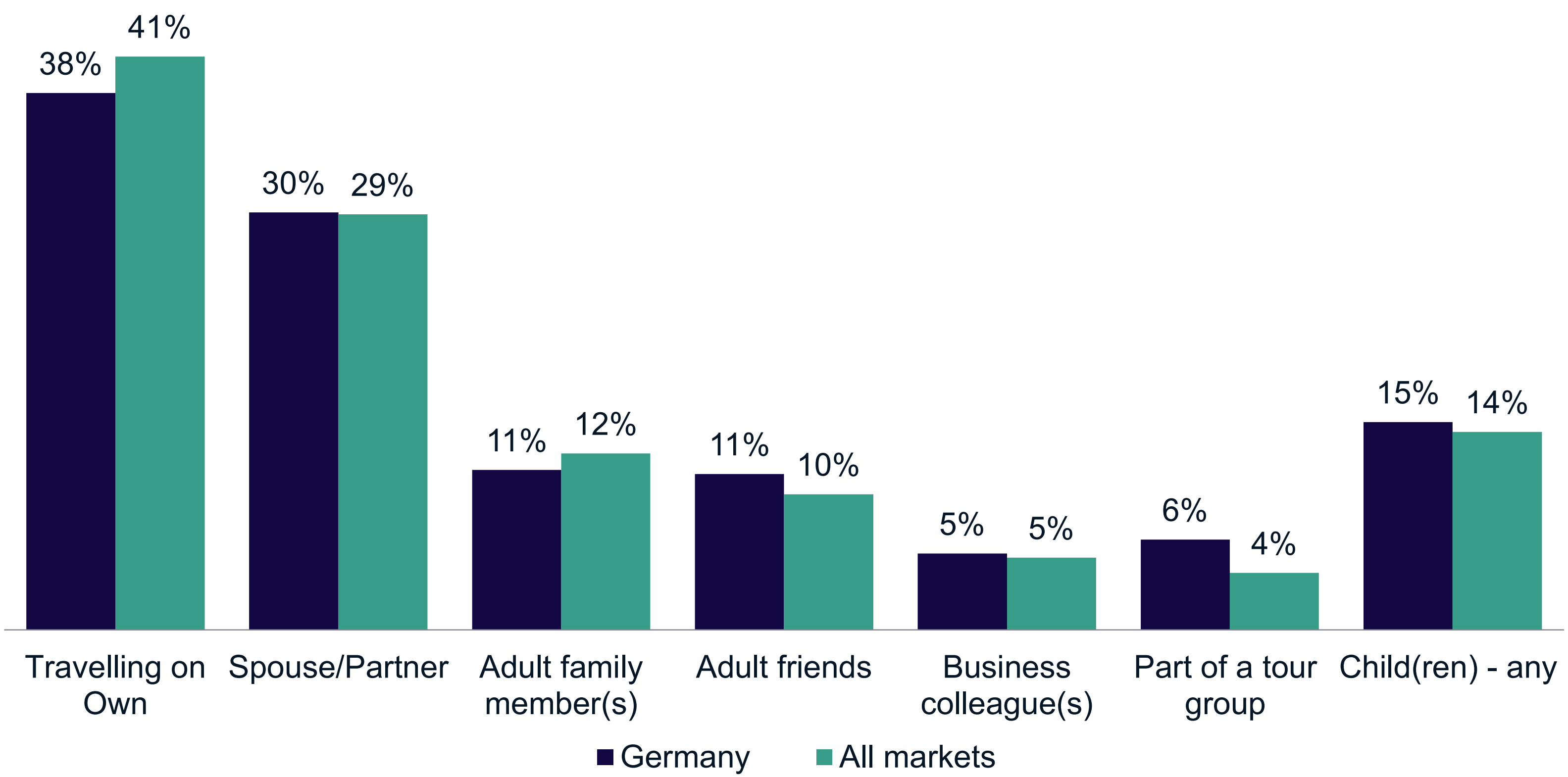
Age group trend (visits in 000s)



Source: International Passenger Survey by ONS; all data displayed excludes 'don't know'

1.3 Visitor demographics: travel companions

Who have German visitors to the UK travelled with?

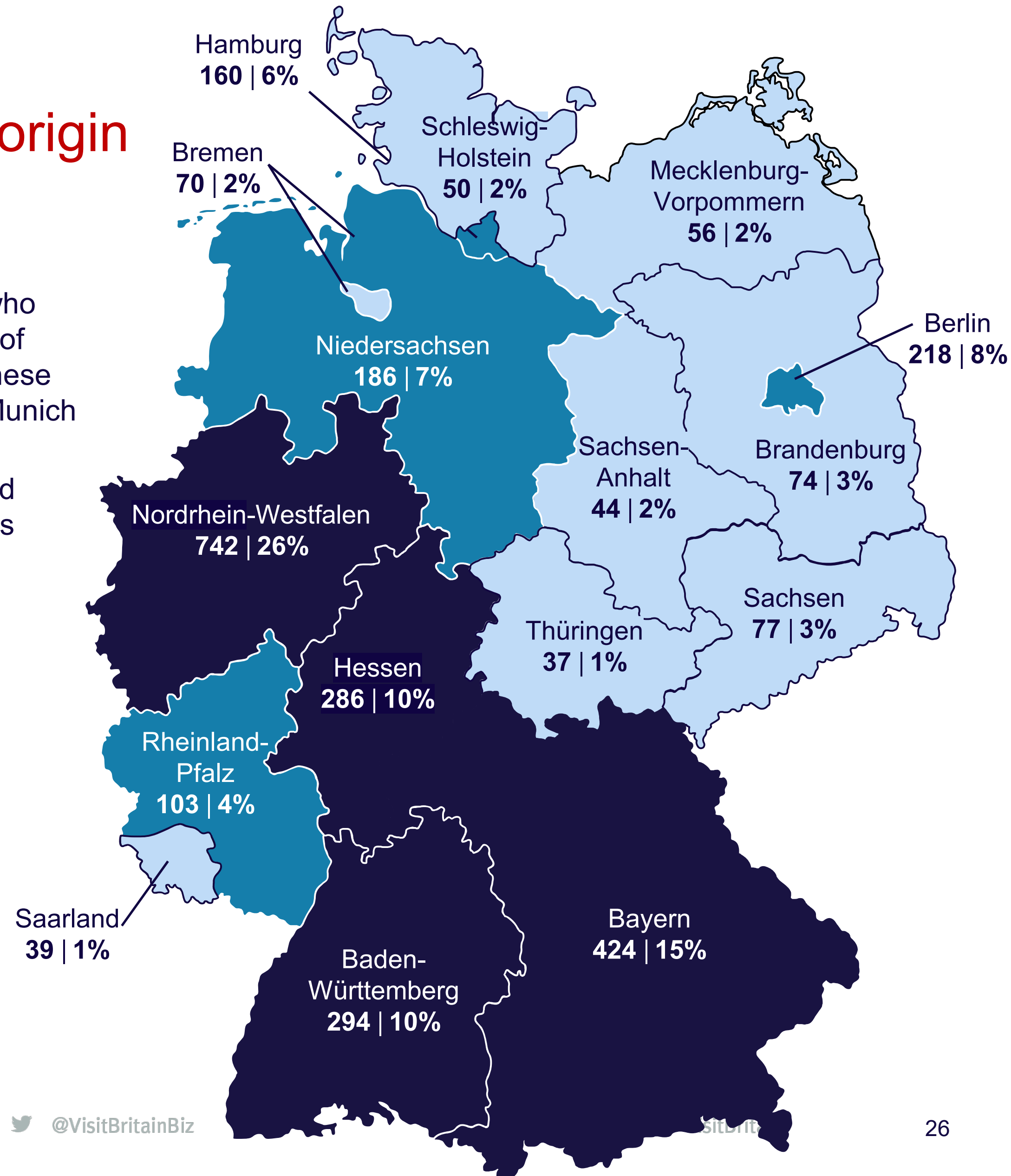


Source: International Passenger Survey by ONS, 2017, "Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?"

1.3 Visitor demographics: origin

Visits to the UK

- The largest proportion of German visitors who came to the UK live in the South and West of Germany. Gateway airports to the UK for these areas include Düsseldorf, Cologne/Bonn, Munich and Frankfurt.
- Germany's population is fairly evenly spread throughout most of the country. Urban areas attract larger and denser populations, in particular in North Rhine-Westphalia.



Visits in 000s | % share of visits

- High
- Medium
- Low
- None

Other/unknown
290

Source: International Passenger Survey by ONS 2015, CIA World Factbook 2020

1.4 The UK and its competitors

Market size, share and growth potential

- The UK was the 10th most visited destination by Germans in 2019 (based on overnight visits).
- Britain ranked second for destinations for city & sightseeing trips for German holidaymakers in 2018, behind Italy, and ahead of Spain.
- Despite the shorter-term impact of the Coronavirus pandemic, German visits to the UK are currently forecast to reach similar levels to 2019 again by roughly 2024/2025, with steady grown in the next few years. Current forecasts expect German visitor spending in the UK to exceed £2 billion by 2030.
- Britain sees its position and market share challenged in the competitive set. German travellers often have multiple destinations on their mind when making a destination choice.
- More than 18 million (26% of the total) holiday trips taken by Germans in 2019 were domestic.

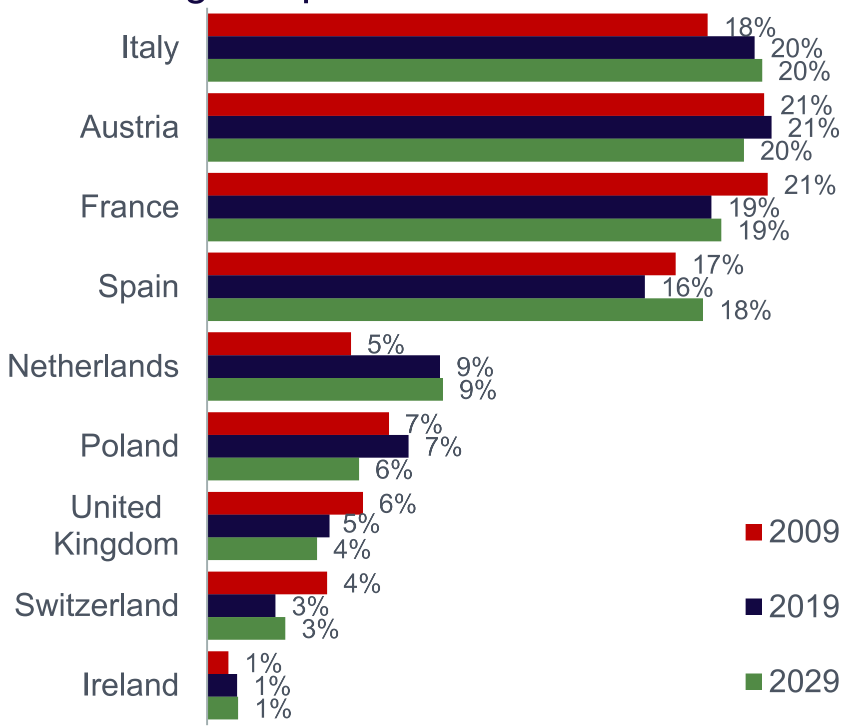
The UK ranks 10th

for German outbound overnight visits

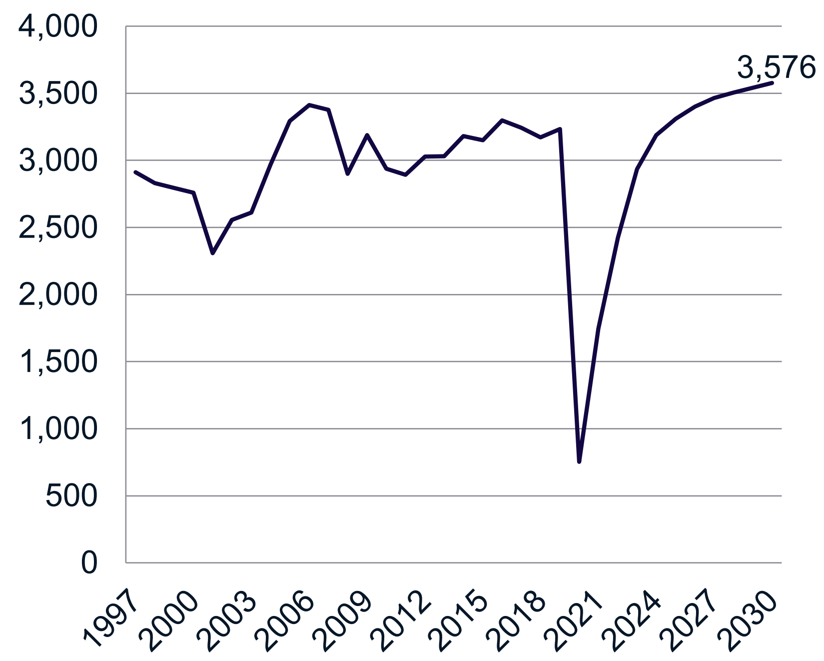
Source: Oxford Economics, VisitBritain/IPSOS 2016, FUR Reiseanalyse 2018 and 2020, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021

1.4 The UK and its competitors: market share and forecast

The UK's market share of German visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits,
'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations

Chapter 2
Experiences and perceptions

2.1 Inbound activities: summary

- Almost two thirds of German visits to the UK feature dining in restaurants; more than half involve shopping. Going to the pub is also very popular.
- 71% of German holiday visits involve sightseeing and more than half of them allow time in a park or garden.
- Built heritage sites, and especially castles, are important attractions for many visitors from Germany.
- Almost a third of Germans on holidays in the UK like to socialise with locals.
- Many Germans enjoy walking in the countryside while here.
- About 126,000 German visits feature time watching live football.

Top 10 activities for German visitors during their visit to the UK

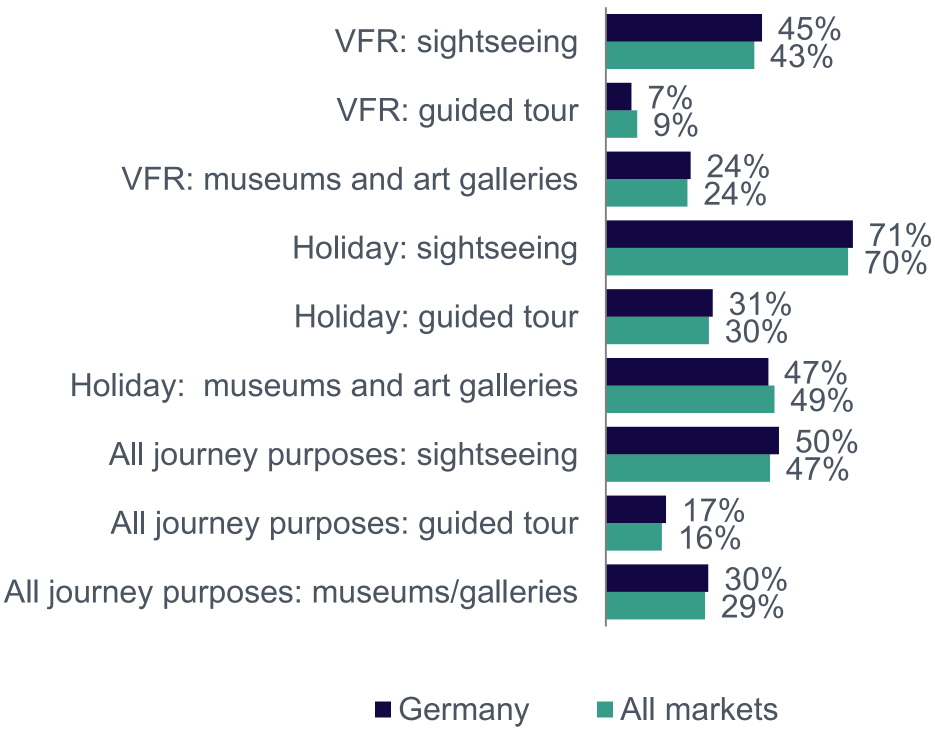
1. Dining in restaurants
2. Going shopping
3. Sightseeing famous monuments/ buildings
4. Going to the pub
5. Visiting parks or gardens
6. Visiting castles or historic houses
7. Socialising with locals
8. Visiting museums or art galleries
9. Walking in the countryside
10. Visiting religious buildings

For more information on activities, please consult: visitbritain.org/activities-undertaken-britain

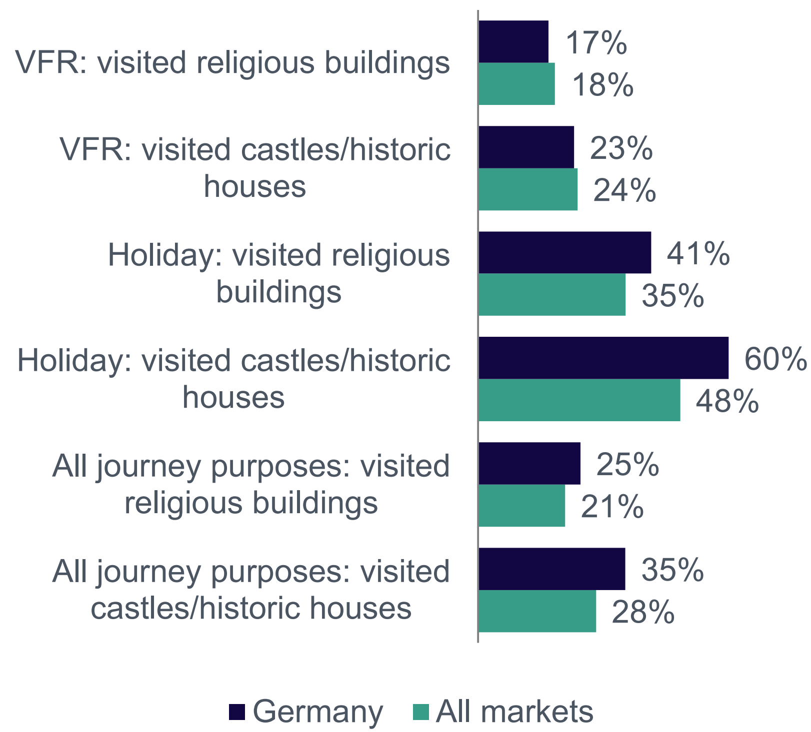
Source: International Passenger Survey by ONS, rankings based on 2007-2019 data

2.1 Inbound activities: tourism and heritage

Propensity to visit museums and galleries or go sightseeing



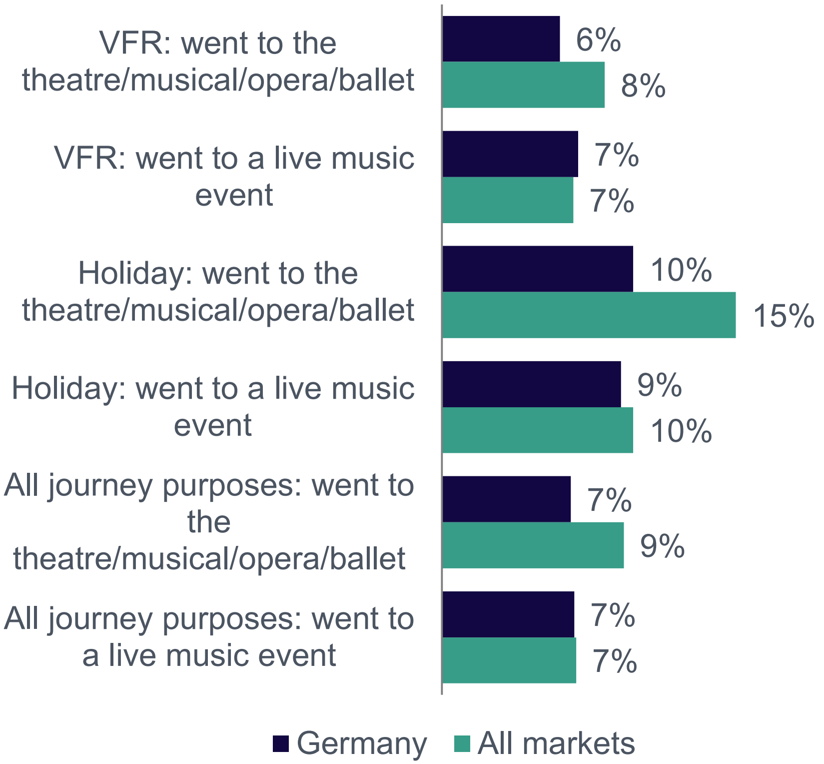
Propensity to visit built heritage sites



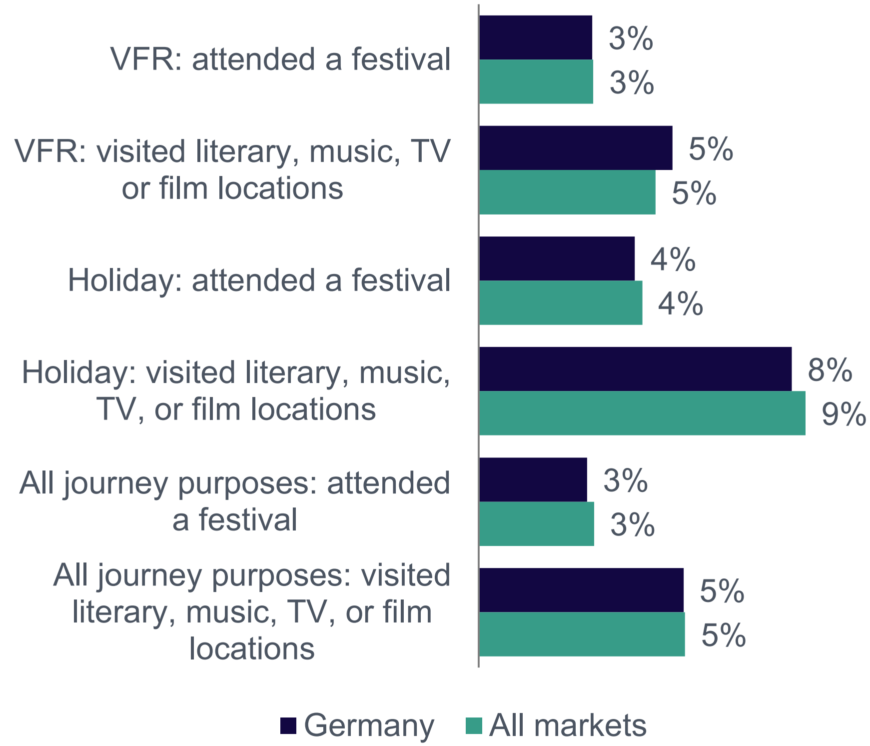
Source: International Passenger Survey by ONS, 2016, 2017 and 2019

2.1 Inbound activities: culture

Propensity to attend the performing arts



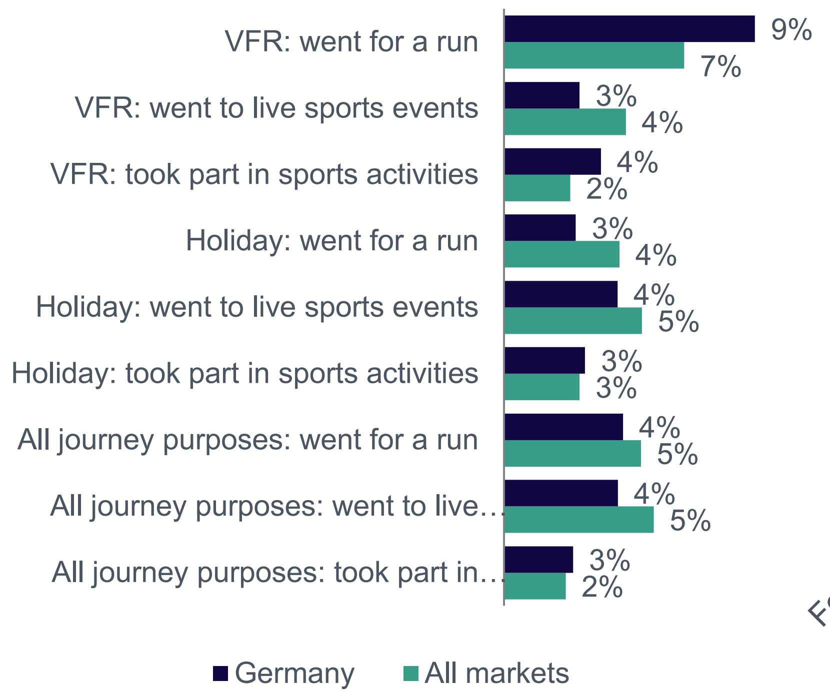
Propensity to attend festivals, or visit literary, music, TV or film locations



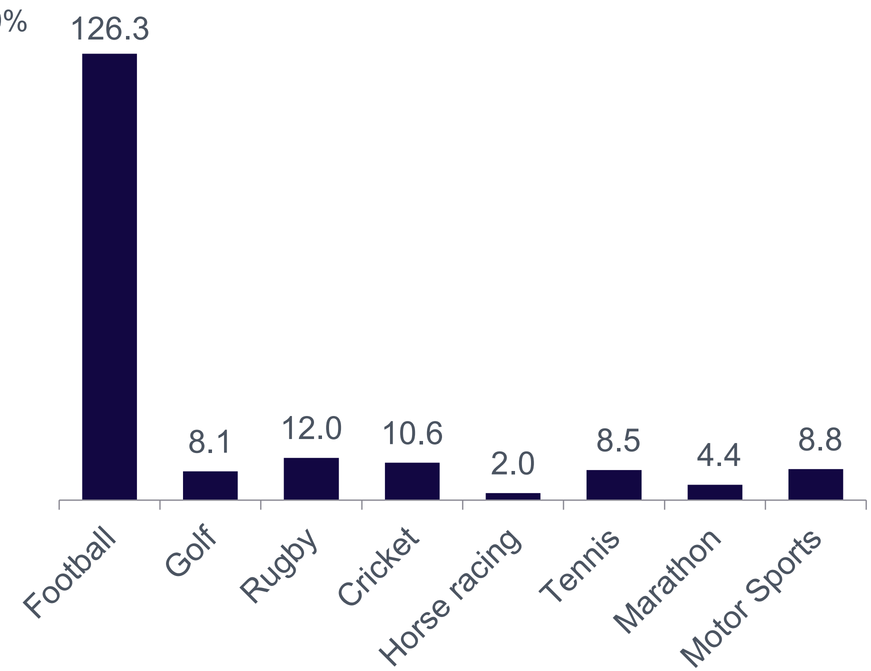
Source: International Passenger Survey by ONS, 2016 (performing arts)

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



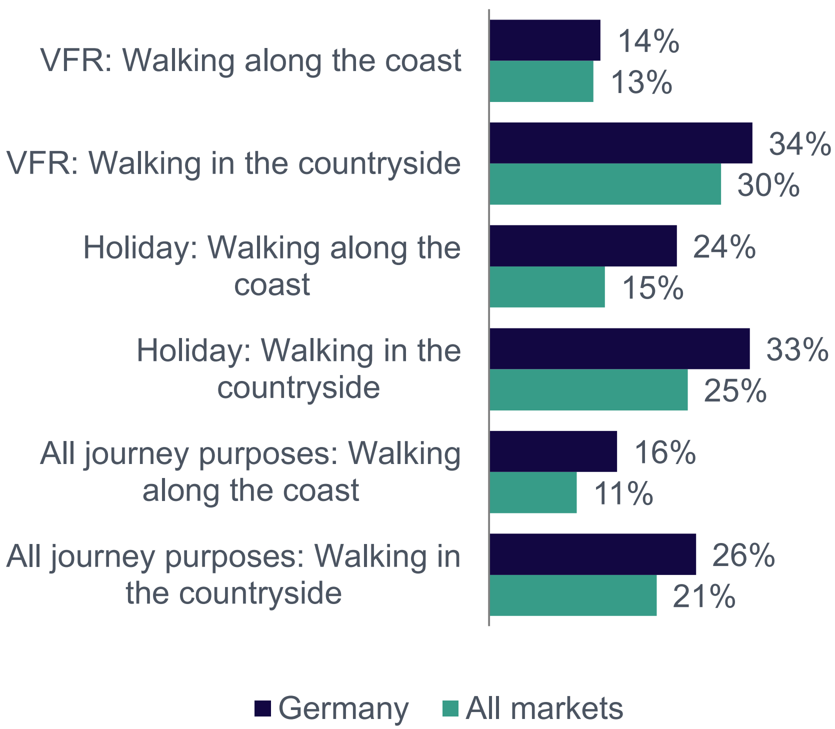
Number who watched sports live during trip (000s)



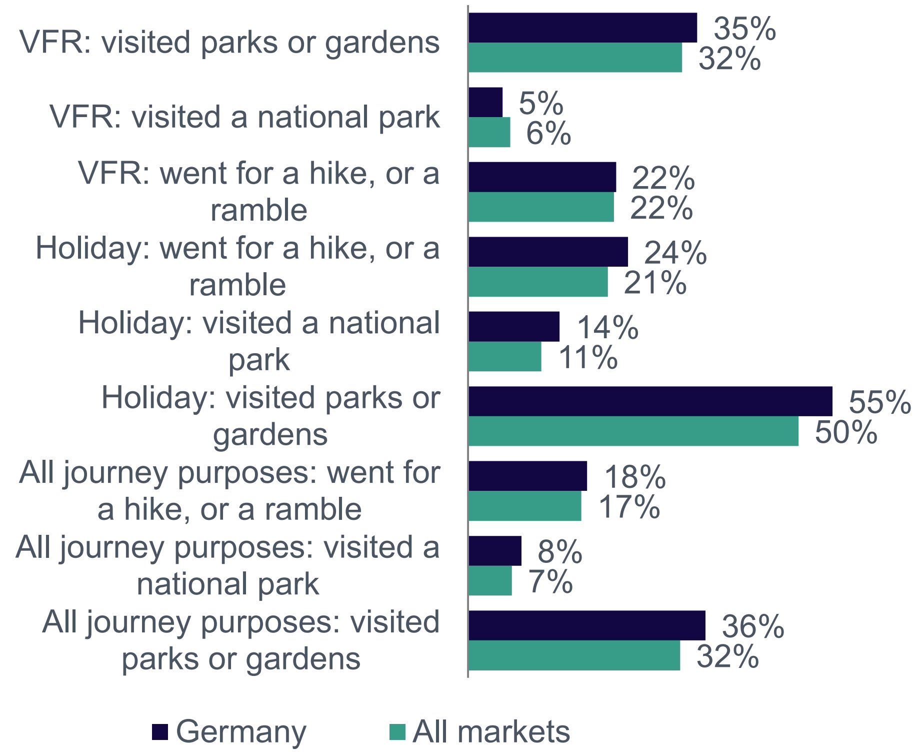
Source: International Passenger Survey by ONS, 2016 (performing arts) and 2019 (watch sport live)

2.1 Inbound activities: outdoors

Propensity to go for a walk along the coast or in the countryside



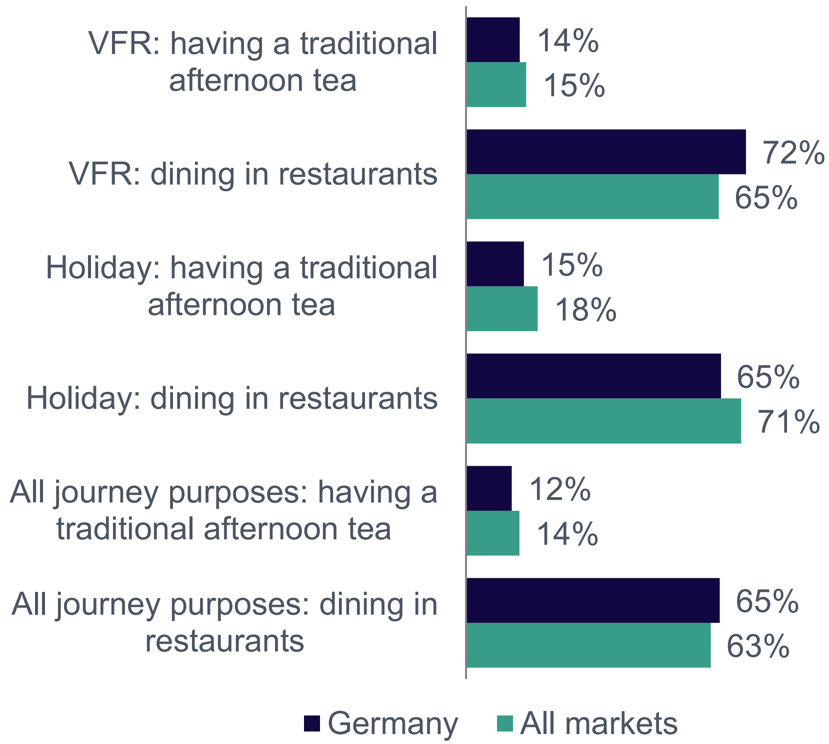
Propensity to enjoy the outdoors



Source: International Passenger Survey by ONS, 2019 (walking along the coast/ in the countryside), 2016 (visiting parks and gardens and a national park), 2014 (hiking/rambling)

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea

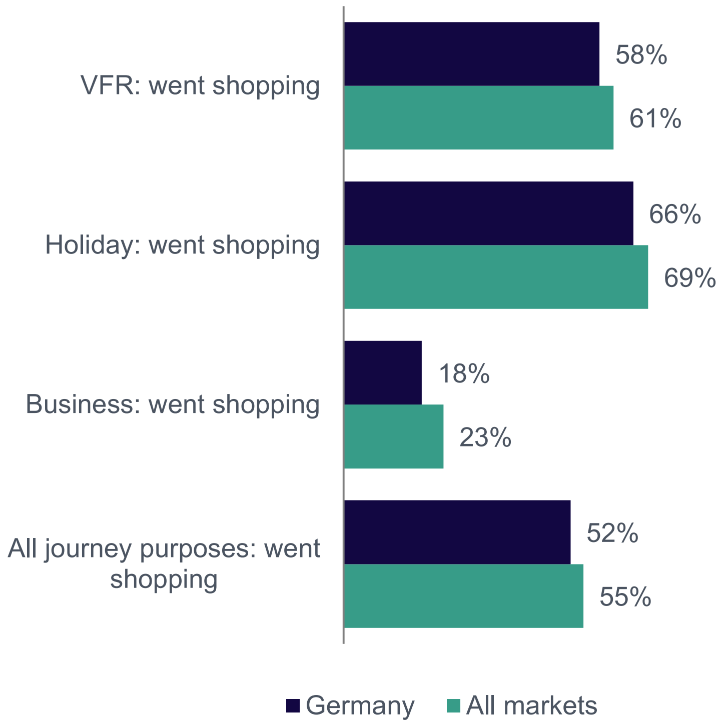


Propensity to go to the pub, bars and night clubs, or to socialise with locals

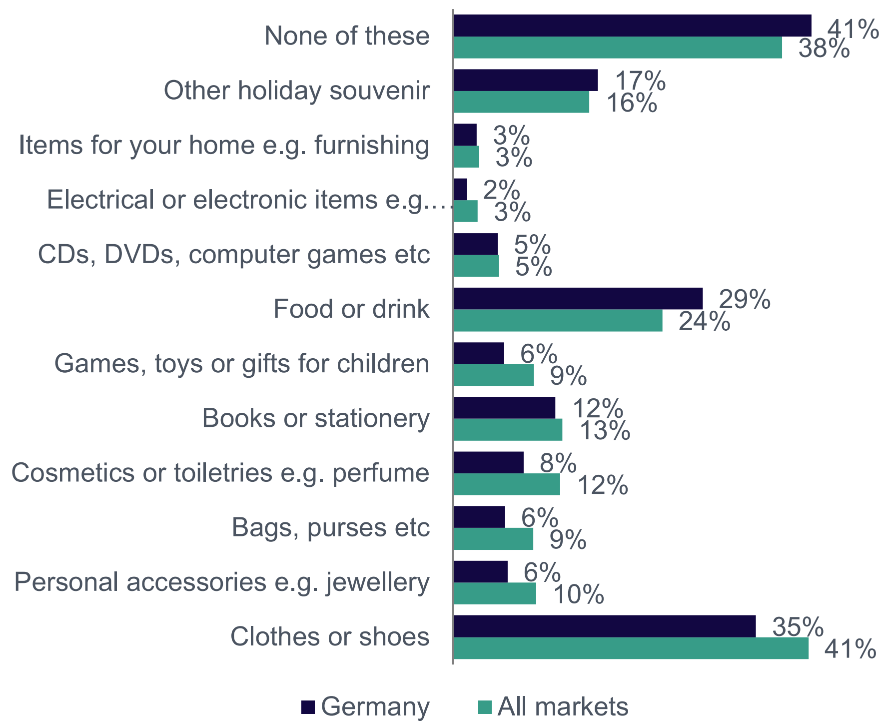
Source: International Passenger Survey by ONS, 2019 (dining in restaurants and having traditional afternoon tea) and 2017 (all other activities)

2.1 Inbound activities: shopping

Propensity to go to shopping



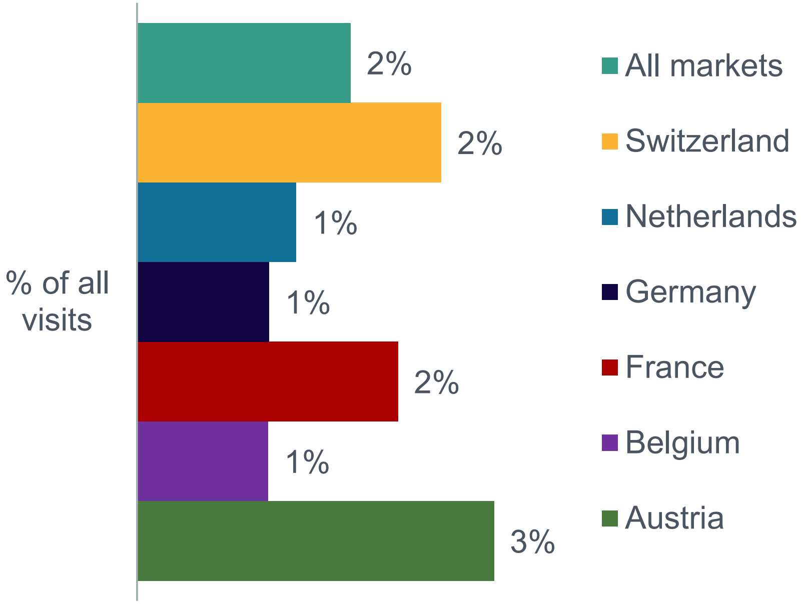
Propensity to purchase selected items



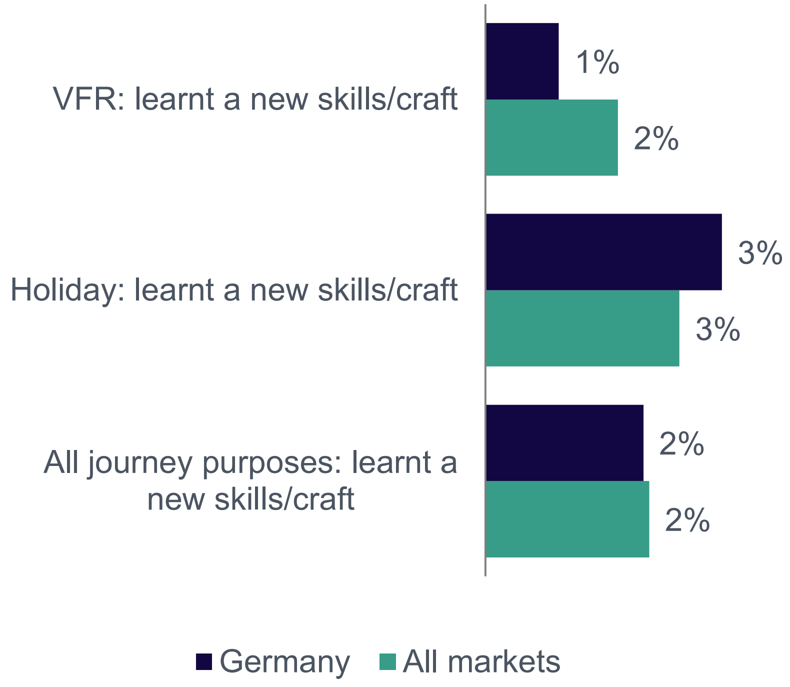
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items)

2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK



Propensity to learn a new skill or craft



Source: International Passenger Survey by ONS, 2019 (new skill/craft), 2018, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.

2.2 Experiencing a visit to the UK

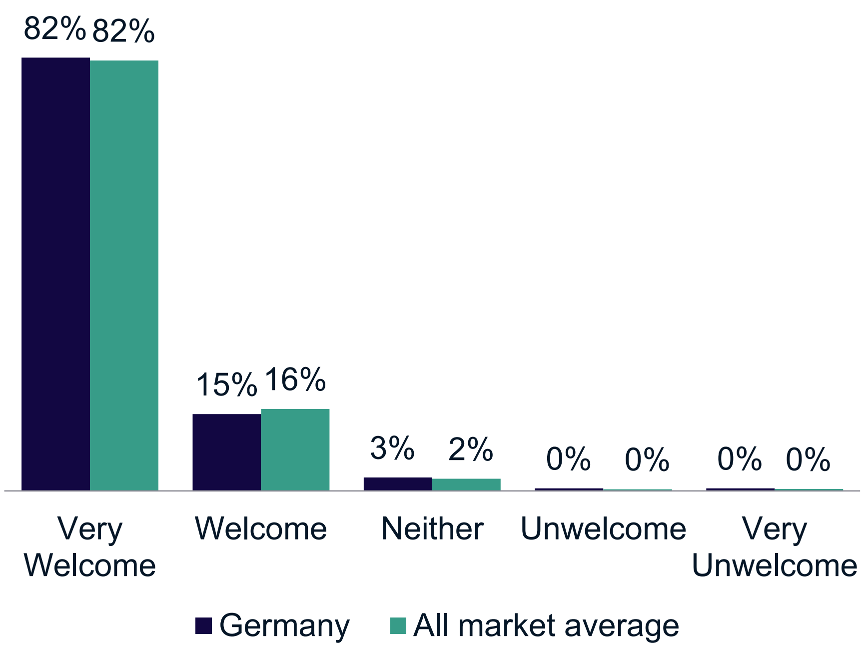
- 82% of visitors from Germany felt very welcome during their stay in the UK, in line with the all-market average.
- 96% of German visitors would recommend a holiday or short break in the UK.
- Asked for reasons which would encourage Germans to travel back to the UK for a holiday, almost half said that they would like to visit a different part of the UK. More than two in five would like to see sights or attractions they could not see on their last visit(s), closely followed by travelling back as the UK is easy to get around and caters well to tourists. More than one in three German respondents also stated that they would be encouraged to holiday in the UK again as it is easy for them to get to, and more than one in four would also like to go to sights or attractions again which they visited before.
  They over-index for all these reasons compared to the all-market average.

96%
of German visitors would recommend a holiday or short break in the UK*

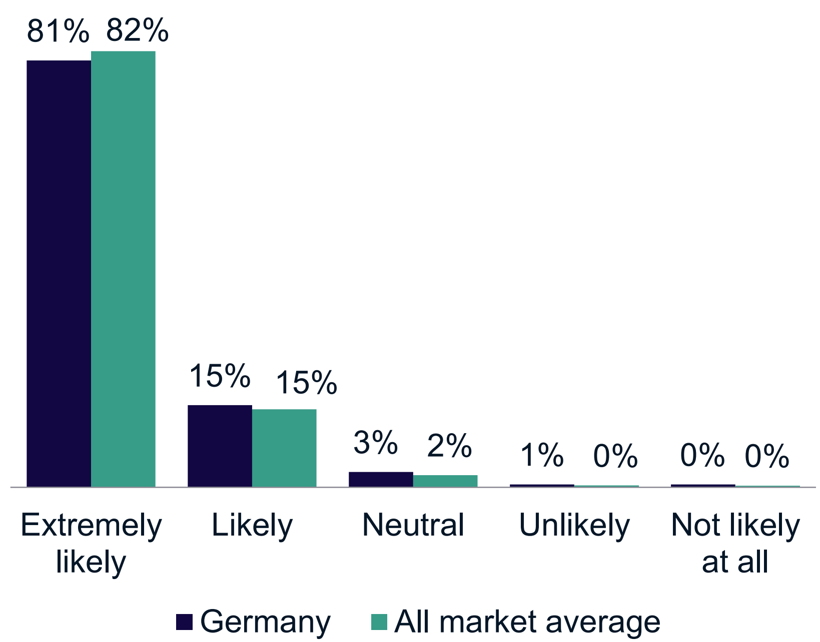
Source: IPS by the ONS (2017; *all visits, excluding UK nationals), Ipsos-Anholt Nation Brands Index 2019 (previous visits refer to previous holiday visit(s) made to the UK)

2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain



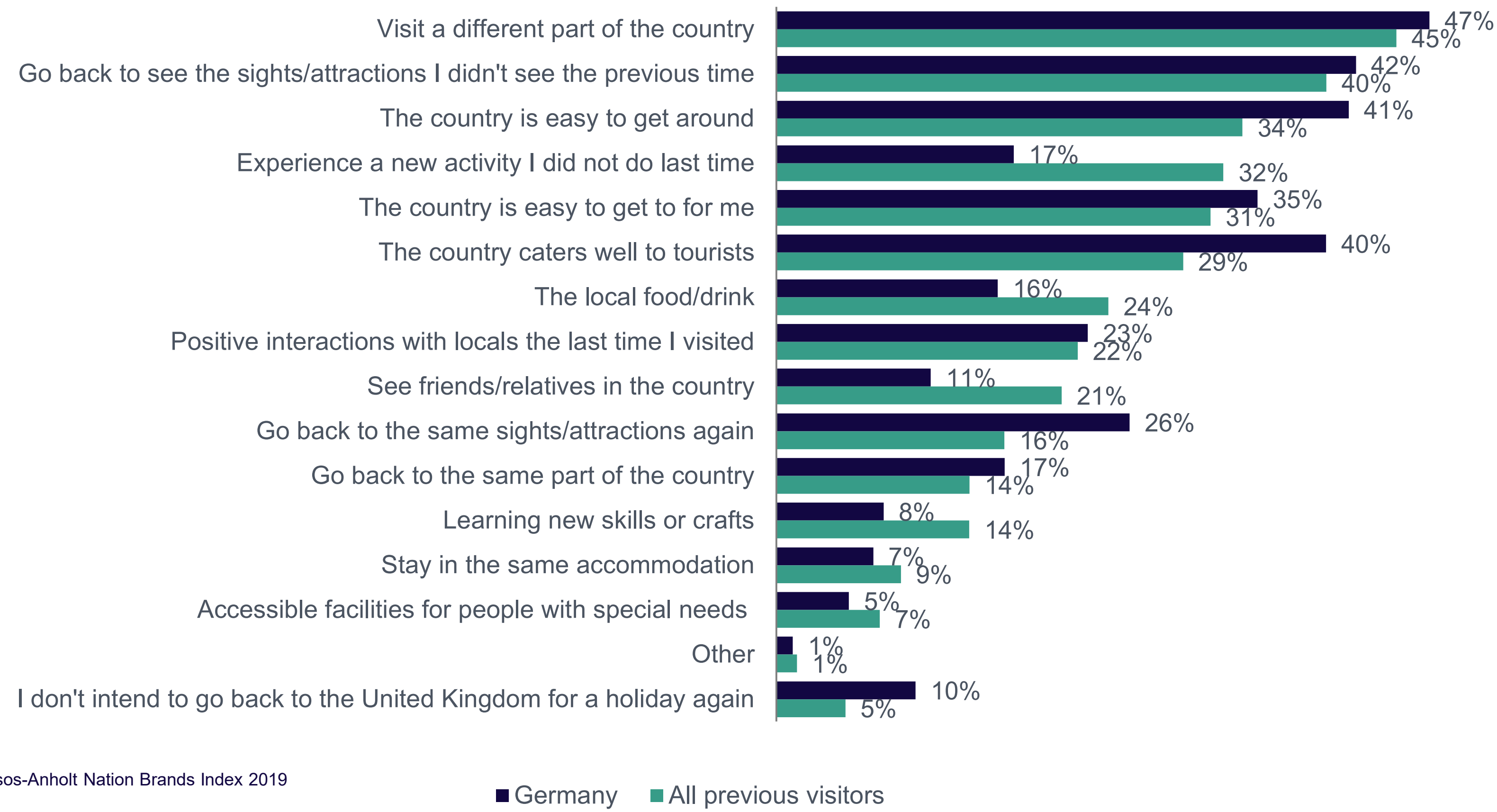
Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017 (excluding UK nationals and nil nights)

2.2 Reasons to return to a holiday destination

Reasons to return to the UK



Source: Ipsos-Anholt Nation Brands Index 2019

2.3 Perceptions of the UK

- Germans rate the UK highly for contemporary culture, culture overall, built heritage, vibrant cities and sports, but less so for its natural beauty and welcome; the UK is rated 32nd and 21st out of fifty nations on these two attributes respectively.
- Music and museums are the cultural products or services the Germans most strongly associated with the UK, followed by films.
- A trip to the UK would be expected to be ‘Educational’, and ‘Exciting’ by Germans, followed by ‘Fascinating’.
- Australia and USA are the destinations that Germans consider the ‘best place’ for delivering what they most want from a holiday place.
- Areas of strength for the UK include: a place to see ‘famous sites’ and for ‘lots of history’; few consider Britain for ‘food and drink’.
- Activities that appeal to potential visitors from Germany include driving through the countryside of England, visiting Madame Tussauds, spotting wildlife in the Scottish Highlands, going hiking on the South West coast and sharing stories over a pint with locals in a cosy rural pub.

Areas of strength for the UK:
Culture, sports, city life, history and famous sites

Source: Anholt-Ipsos Nation Brands Index 2020 and 2018, VisitBritain/Ipsos 2016, VisitBritain/ Arkenford 2013

2.3 Perceptions of the UK (1)

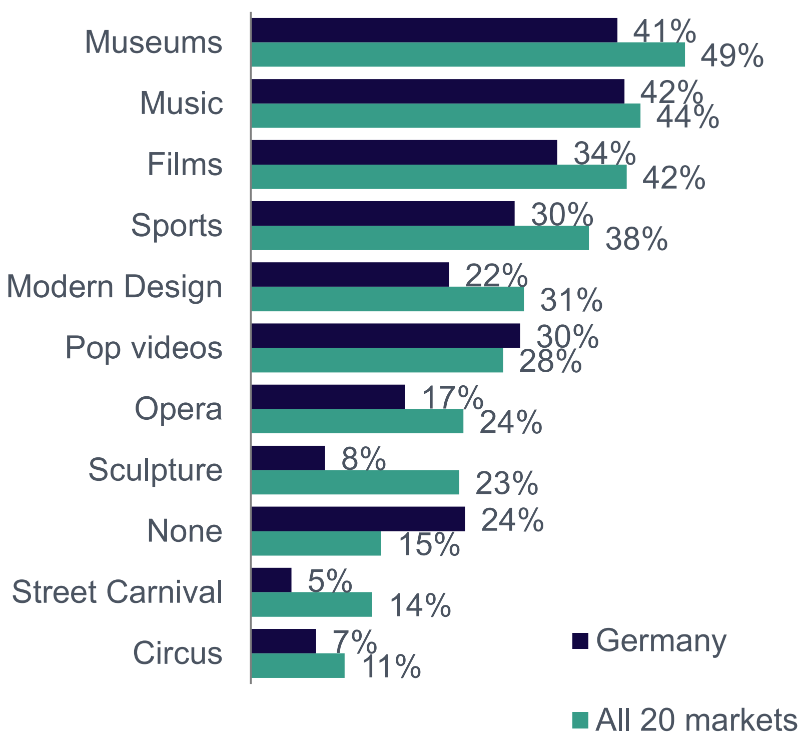
UK's ranking (out of 50 nations)

Measure	German respondents	All respondents
Overall Nation Brand	**17**	**2**
Culture (overall)	**5**	**3**
The country has a rich cultural heritage	9	6
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	4
The country excels at sports	7	3
People (overall)	**18**	**4**
If I visited the country, the people would make me feel welcome	21	11
Tourism (overall)	**15**	**4**
Would like to visit the country if money was no object	16	5
The country is rich in natural beauty	32	23
The country is rich in historic buildings and monuments	6	5
The country has a vibrant city life and urban attractions	7	4

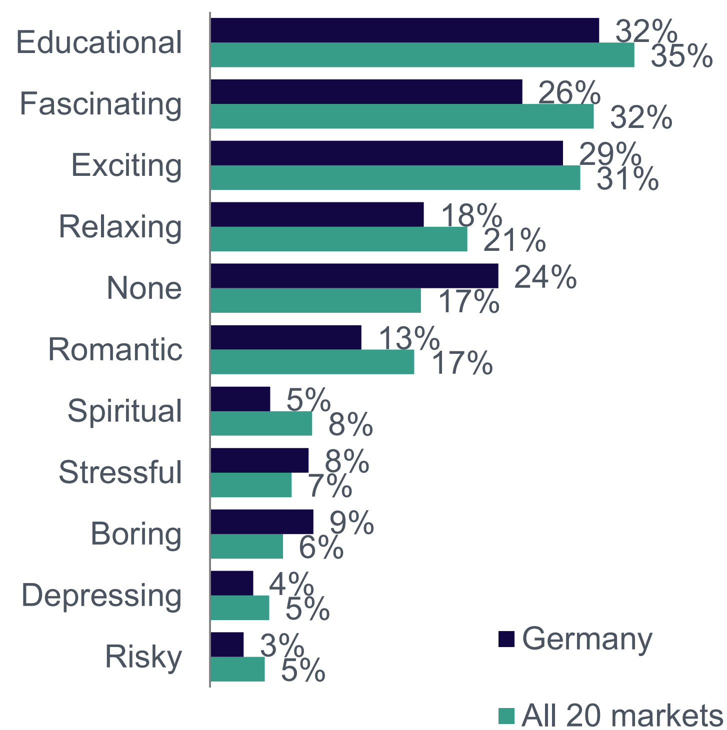
Source: Ipsos-Anholt Nation Brands Index 2020

2.3 Perceptions of the UK (2)

Cultural associations



Adjectives describing a potential trip to the UK



Source: Ipsos-Anholt Nation Brands Index 2020

2.3 Perceptions of the UK (3)

Holiday wants and % saying destination is best place for… (1)

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%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (4)

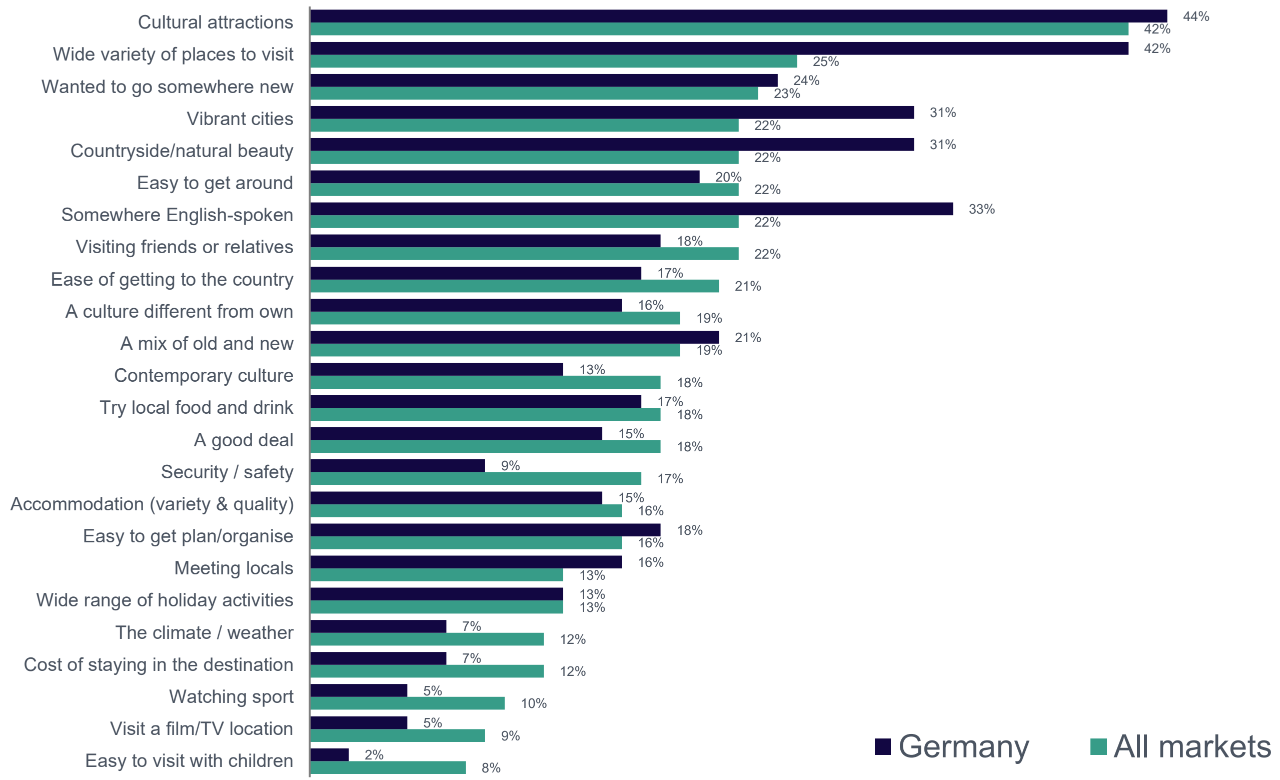
Holiday wants and % saying destination is best place for… (2)

Importance		GB	FR	IT	AU	US	NL
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

2.3 Perceptions of the UK (5)

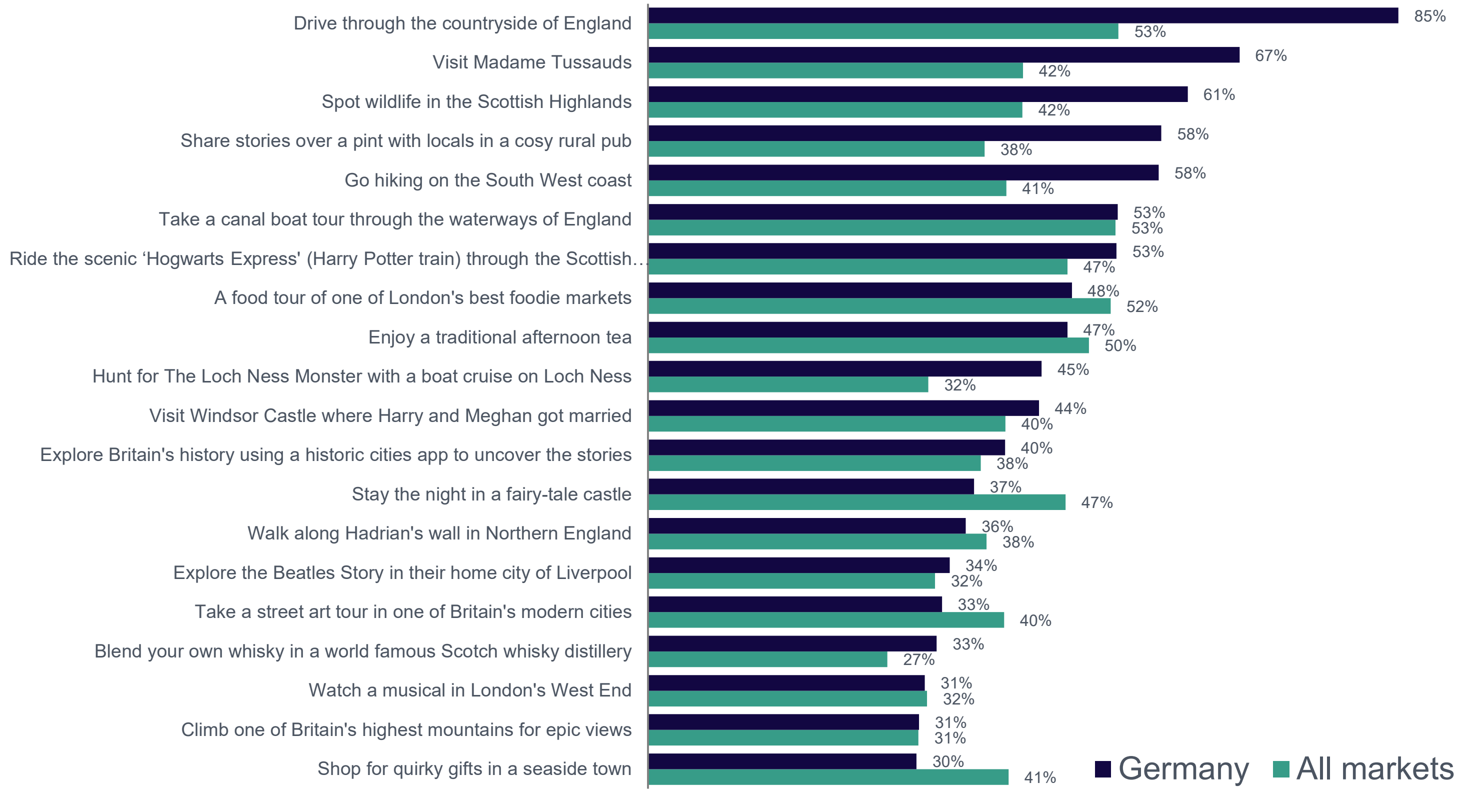
Motivations for choosing Britain as a holiday destination



Source: VisitBritain/Ipsos 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

2.3 Perceptions of the UK (6)

Sought-after Britain activities



Source: Ipsos-Anholt Nation Brands Index 2018; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets. Top 20 activities shown; for full list please see report at visitbritain.org/understanding-international-visitors

Chapter 3:
Understanding the market

3.1 Structural drivers

- With a population of around 83 million, Germany is Western Europe's most populous nation.
- There are 16 Bundesländer (federal states) in the Federal Republic. Germany's population is fairly evenly spread throughout most of the country. Urban areas attract larger and denser populations, in particular in North Rhine-Westphalia. Most Germans live in cities (77% according to 2020 estimates).
- The official language is German; English often is the first or second foreign language Germans learn in school.
- The German economy is Europe's largest and generally speaking fairly robust with strong consumer confidence and spend. The Coronavirus crisis triggered a short but sharp recession, although the economy saw record growth in Q3 2020 and avoided contraction in Q4 2020. GDP is expected to grow by 3.6% in 2021 (status 9 February 2021).
- Germans enjoy a high standard of living with GDP per capita in purchasing power parity terms of more than US$50,000.
- Germany has Europe's largest population of High Net Worth Individuals*.

83m
German population

Source: Oxford Economics, CIA World Factbook, Capgemni World Wealth Report 2020 *cf. annex for definition

3.1 Structural drivers: general market overview

General market conditions

- Germany is the UK's third largest source market in terms of visits and visitor spending in 2019.
- The German economy is Europe's largest and generally speaking fairly robust. GDP was stable in volume terms in 2019, before the COVID-19 crisis hit. Overall, Germans enjoy a high standard of living with GDP per capita in purchasing power parity (PPP) terms of more than US$50,000 in 2019, 12% above the average for the Eurozone.
- However, the impact of the Covid-19 crisis caused a short but sharp recession, although the third quarter of 2020 showed record growth and the last quarter of 2020 avoided a contraction. A recovery of GDP to levels seen before the crisis is expected by the end of 2021 due to targeted support measures. The risks currently remain to the downside.
- The unemployment rate for 2021 is forecast to remain stable vs. 2020 and consumer spending is expected to pick up growth in 2021 after a sharp decline in 2020.

Key demographic and economic data

Measure (2019 data)	Germany	Eurozone
Population (m)	83.1	338.9
GDP per capita PPP (US$)	50,122	44,680
Annual average GDP growth over past decade (%)	1.9	1.4
GDP growth year-on-year (%)	0.6	1.3

Economic indicators (%)

Indicator	2019	2020	2021	2022
Real GDP growth	0.6	-5.3	3.6	4.7
Real consumer spending growth	1.6	-6.6	2.5	8.1
Unemployment rate	5.0	5.9	6.0	5.4

Source: Oxford Economics

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	Estimate
Total population (2019)	83.1 millions
Median age (2020)	48 years old
Overall growth rate (2019-2024)	0.5%

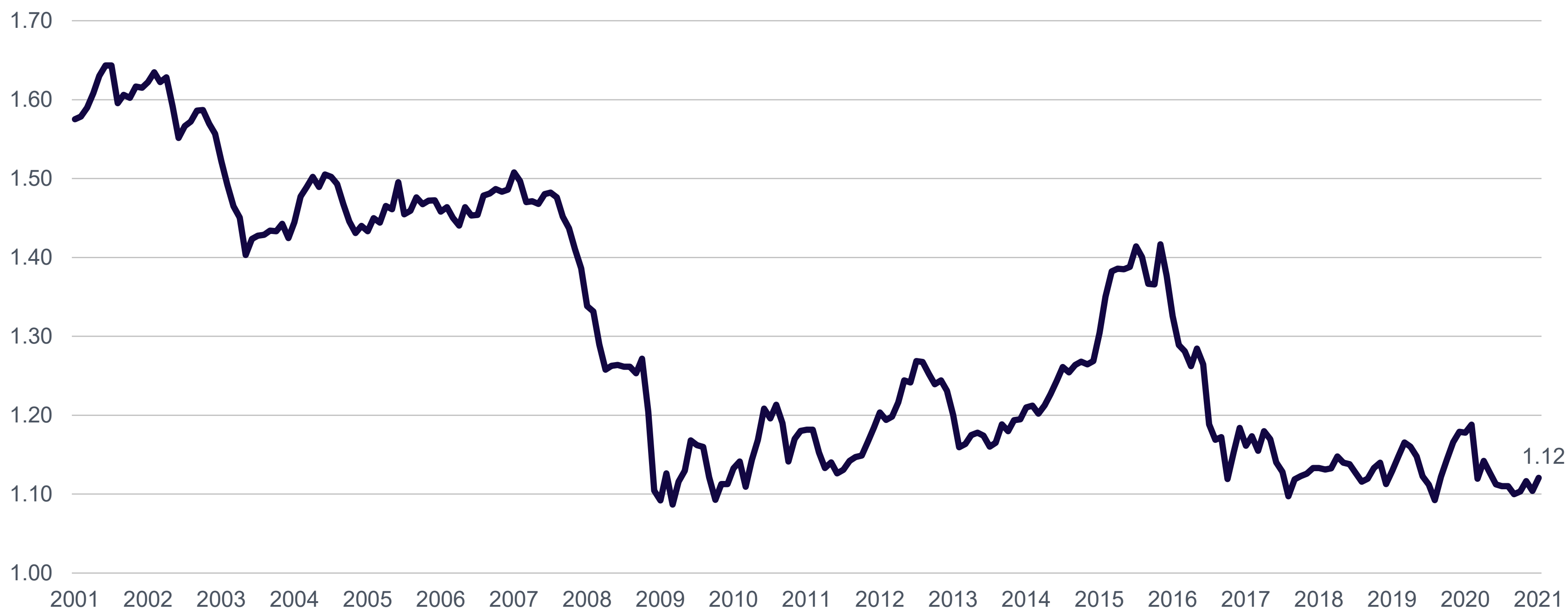
Indicator	1980	2015	2030	2050
Median age (in years)	36.5	45.9	47.0	49.2

- Germany is the most populous country in Europe.
- The country has the second oldest population in Europe and the fourth oldest globally with a median age of 48.
- 77% of Germans live in urban areas.
- 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 in total (above the European average).
- According to the Capgemini World Wealth Report 2020 there were 1,466,000 High Net Worth Individuals (HNWI)* resident in Germany, up 9% from 1,350,000 in 2018. This represents Europe's largest and globally the third largest HNWI population globally behind the USA and Japan.

Source: Oxford Economics, CIA World Factbook 2019, Statista 2020, Capgemini World Wealth Report 2020 *definition in appendix

3.1 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

3.2 Consumer trends

- Counting all outbound trips (incl. day trips), Germans are the second largest source market globally by trip volume, leapfrogged by Chinese travellers a few years ago.
- 2019 was a good year for German holiday trips which remained on similarly high levels as in 2018. After the pandemic impact in 2020, prospects for the short term are quite robust with almost three in five Germans seeing their personal financial situation not affected and four in five having already thought about holidays in 2021.
- E-commerce is still showing strong growth in Germany and in 2019 e-commerce turnover increased to €58bn (HDE).
- Official travel policy and advice as well as health and safety factors are most important facilitators to increase the likelihood of Germans travelling again. In addition, flexible booking terms e.g. money-back guarantees are important for Germans. More than seven in ten Germans will look for less crowded places and expect to book last minute.

70.8m
holiday journeys of 5 nights of more by Germans aged 14+ in 2019

Source: FUR Reiseanalyse 2020, Handelsverband Deutschland HDE 2019/Statista, WTO via Skift 2019, VisitBritain/OMD July 2020, FUR Reiseanalyse 2021 preliminary results 26 January 2021; TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021

3.2 Consumer trends: overall travel trends (1)

Travel trends (prior to the COVID-19 pandemic)

The total number of holiday travellers (55.2 million in 2019 (5 nights or more)) as well as the total number of such holiday journeys taken (70.8 million in 2019) remained both on a high level in 2019, roughly in line with the previous year. In 2019, the average spend on a holiday of five nights or more exceeded €1,000 for the third year. At the start of 2020 all indicated a good year until the COVID-19 crisis hit. (Reiseanalyse 2019).

Short holiday breaks continue to be very popular amongst Germans and have almost matched the 2018 with almost 88 million short breaks of up to 4 nights which were taken in 2019.

74% of all holidays went to a destination abroad which corresponds to a volume of 52 million trips. Domestic trips accounted for 26% of all holiday trips, making Germany the single biggest destination. In line with the increase in holidays abroad, trips taken by plane set up a new record with a new record share of 42%. The long-term trend shows a slight tendency towards shorter trips but higher holiday spend. Almost a third of holidays abroad were also taken by car/camper van.

Source: FUR Reiseanalyse 2019 and 2020, CLIA 2019

The German cruise market is still showing strong growth, it grew by 17% in the first half of 2019; and the prognosis for 2020 was positive before the COVID-19 crisis.

Reliance on traditional retail agents for travel bookings is much stronger than in many other European countries, but since 2018 online bookings (44% in 2019) have overtaken bookings made through a travel agent (39%). In FUR's forecast their share is expected to be roughly two in three holiday trips (5 nights+) by 2030. In 2019, for short holiday trips, the share of online bookings is even higher (70%).

Germans tend to use a mix of online and offline sources for advice. Online sources have increased in relevance over traditional print source. Social media has the greatest influencing potential for age cohorts up to 30. 12% are inspired by deep storytelling about people and nature in the destination, 22% prefer entertaining and short content. The majority are looking for facts: 32% look for reports about experiences in the destination, 27% use neutral information about prices, accommodation and weather. 63% of holiday bookings (5 days plus) to Great Britain use digital channels.

Full package and bespoke packages still lead as the most common type of holiday (45%), followed by individual bookings of accommodation (35%) in 2019.

3.2 Consumer trends: overall travel trends (2)

Motivation and attitudes to holidays (prior to the COVID-19 pandemic)

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.

For 53.2 million Germans, i.e. three quarters, have an affinity to health on holidays. Asked which aspect is the most important when doing some health-oriented offers or activities, their physical health is the most common priority (26%), followed by their mental health (24%) and enjoyment (22%). Particularly higher social classes over-index on engagement in these activities for their mental health, while lower social classes over-index for physical health.

Amongst the most popular holiday destinations are typical sunshine destinations such as the Mediterranean with Spain being most popular.

For many Germans sustainability on holidays is important but there is still a big gap in the general attitude and actual behaviour. In January 2020, more than two in three (61%) said that their holiday should be socially sustainable and/or environmentally friendly which shows very good intentions.

When looking at actual behaviour, only 6% went for an accommodation or tour operator with sustainability credentials. Only 3% paid to offset their CO2 emissions of the arrival/departure journeys or their stay in 2019. However, there is already more sustainable travel by Germans to some specific destinations like the Nordics (Sweden, Norway and Finland). 11% of Germans who travelled there on a holiday of at least five nights paid for carbon emission compensation, and 19% chose accommodation or an operator with sustainability certification. Germans on business trips or short holidays over-index for these actions, too. When asked which sustainable actions they take in the holiday destination, they engaged mainly in those which are easy to do or fit the destination: 36% mainly walked or cycled in the destination, 25% pay attention to waste avoidance, 24% bought regional product and souvenirs, and one in five used bus or train and wanted to learn about local culture and traditions, and almost as many avoided overcrowded places. Just under one in five chose a near travel destination, travelled outside of main season and used accommodation run by locals. Almost three in five Germans (73%) had a bad conscience for taking a flight when they travelled in the past year.

Source: FUR Reiseanalyse 2020

3.2 Consumer trends: impact of the COVID-19 pandemic

- 2020 saw an estimated 77% year-on-year decline in volume and value of visitation from Germany to the UK as a result of the COVID-19 pandemic. At the time of writing (10 February 2021), both the German and the UK government advise against non-essential travel.
- The first wave of VisitBritain's international recovery sentiment tracking research reveals: 65% of Germans considered taking an international leisure trip in the next 12 months (fieldwork 2nd-16th December 2020), showing strong desire to travel. Of them, 76% are considering Europe and 6% Britain.
- Britain ranks 9th for consideration of Germans hoping to go on a European leisure trip, behind Spain, Italy, Austria, France, Greece, Croatia, Switzerland, and Portugal, and ahead of Denmark.
- As of December 2020, a third of Germans had not given much thought to planning their next leisure trip abroad and another third had started thinking about it but not decided where to go showing a considerable opportunity to influence destination choice for when the time is right to travel again.
- Almost three quarters (72%) would like to go to less crowded places even if it means missing 'must-see' attractions and expect to book last minute.

Key activators for an international leisure trip

	Germany	All markets
No quarantine requirement in the destination country	45%	36%
No quarantine requirement in the home country	39%	30%
Significant decrease in COVID-19 cases	39%	38%
Money-back guarantee should they wish to cancel	36%	36%
Availability of vaccine/ treatment against COVID-19	31%	41%
Hygiene and safety protocols in the destination	30%	34%

Source: TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021, NB: Sentiment data is from a tracking study, and results may change in subsequent waves

3.3 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. Almost one in five visitors book their trip to Britain less than a month before.
  As a result of the pandemic, 72% of German travellers plan to leave booking until the last minute (status: December 2020).
- 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, TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked: travel only

Booking method	Germany	All markets
Online	82%	85%
Face-to-face	14%	10%
By phone	4%	4%
Don't know	1%	1%

- 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.
- Just over half of Germans own a credit card. More than half of e-commerce transactions are still made via bank transfers, followed by a quarter via e-wallets.

How trips to Britain were booked: accommodation only

Booking method	Germany	All markets
Online	72%	70%
Face-to-face	10%	7%
By phone	5%	3%
Did not book/stayed with friends/relatives	13%	17%
Don't know	1%	2%

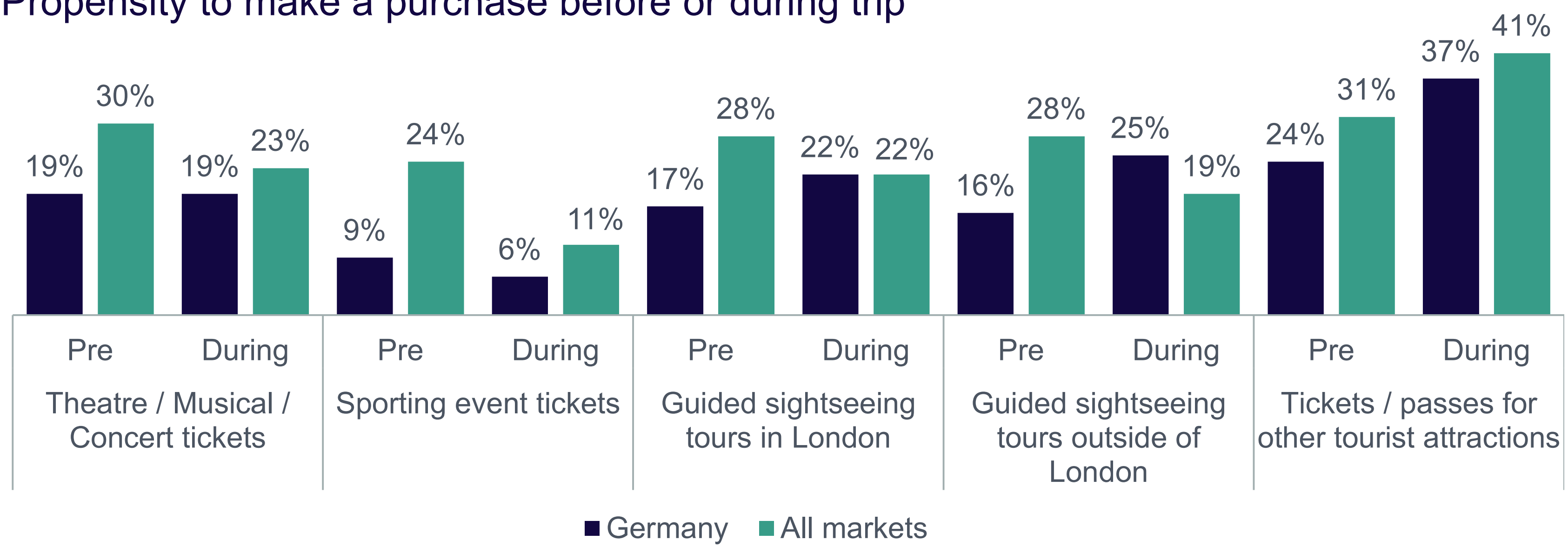
How trips to Britain were booked: travel and accommodation (holiday)

Booking method	Germany	All markets
Online	58%	64%
Face-to-face	36%	27%
By phone	5%	8%
Don't know	1%	1%

Source: VisitBritain/IPSOS 2016, base: visitors (online survey), We are Social Hootsuite Digital 2020 Germany

3.3 Booking and planning: booking channels and ticket sales (2)

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.

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

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Germany	All markets
6+ months	57%	49%
3-6 months	28%	31%
1-2 months	9%	13%
Less than 1 month	5%	5%
Don’t know	1%	3%

Deciding on the destination

Lead time	Germany	All markets
6+ months	38%	32%
3-6 months	40%	38%
1-2 months	13%	19%
Less than 1 month	7%	7%
Don’t know	3%	3%

Looking at options/prices

Lead time	Germany	All markets
6+ months	24%	21%
3-6 months	46%	37%
1-2 months	17%	27%
Less than 1 month	11%	12%
Don’t know	4%	4%

Booking the trip

Lead time	Germany	All markets
6+ months	15%	14%
3-6 months	44%	32%
1-2 months	17%	28%
Less than 1 month	19%	21%
Don’t know	4%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain: commentary (see tables on previous slide)

- 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 in advance of their trip 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 44% 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 (80% and 63% respectively). When they bought travel and accommodation together as a package 71% chose to book it through a travel agent, tour operator or travel comparison website.
- As a result of the pandemic, current booking patterns even in a long-lead market like Germany have changed. 72% of German travellers plan to leave booking until the last minute (status: December 2020).

Source: VisitBritain/IPSOS 2016, base: visitors; TCI/VisitBritain/VisitScotland/Visit Wales/London & Partners published February 2021

3.4 Reaching the consumer

- The most influential sources 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. More than one in five say a travel feature/article in a newspaper or magazine or an official tourist brochure influenced their destination choice which is above the all-marekt average.
- A large share of Germans mix online and offline sources particularly at the inspiration and information stages of the customer journey; few are using online sources only.
- Among those who have not yet visited Britain but are interested, roughly a third stated at least some influence on their destination choice when they had seen it on film or TV or read about it in a book.

Friends, family & colleagues

#1 Influence for the destination choice of Germans

Source: VisitBritain/IPSOS 2016, FUR Reiseanalyse 2020, Ipsos-Anholt Nation Brands Index 2017

3.4 Reaching the consumer: broadcast media, radio and papers

Broadcast media

- In Germany, viewing time of TV depends heavily on age groups with the over 50 age cohort consuming on average more than five hours daily, while consumption has declined particularly among children.
- Biggest national public broadcasters are ZDF, ARD, and Deutschlandradio with their regional subchannels
- Commercial TV landscape: RTL group and ProSieben-SAT1 media group, pay TV on the rise: Sky, Netflix, Amazon Prime, Disney+, DAZN etc. and some local TV and teleshopping channels.
- Few dedicated travel programmes: “Da will ich hin…” (SR), “Service: Reisen” (HR), “Reisewege” (SWR), “Nordseereport” (NR) and “Grenzenlos” (SAT1) as well as travel features on the German-French quality channel ARTE.
- The variety and quality of the German radio landscape is unique. Almost 500 radio programmes are registered and reach over 53 million (76%) of German people every day. Hardly any of them have dedicated travel programmes but they still offer good media opportunities to engage with their regional audience.
- TV ads are the second-most important source for brand discovery among Internet users aged 16-64 (35%), behind search engines (39%) and word of mouth recommendations (30%) as well as retail websites (30%).

Newspapers

- The German newspaper market is the biggest in Western Europe and ranks 5th worldwide: 42 million read a print newspaper each day (=60% of the population). With their printed copies and digital versions a total of almost 90% of the population aged 14+ is reached every day. Regional papers make up a large part of this market and are often part of large national syndication networks.
- The main publishing houses are spread across the country with Berlin being one of the most prominent media centres as well as Munich or Hamburg.

Source: BDZV - Bundesverband Digitalpublisher und Zeitungsverleger e.V. 2020, VAUNET Verband Privater Meden 23 October 2020, We are Social Hootsuite Digital 2020 Germany

3.4 Reaching the consumer: papers and magazines

Newspapers (continued)

- The biggest national daily titles include: BILD, Süddeutsche Zeitung (SZ), Frankfurter Allgemeine Zeitung (FAZ), Handelsblatt and Die Welt, with BILD being the highest-selling tabloid in Europe by subscribers (circulation: 1.3 million)
- Biggest weekly national newspapers are: Bild am Sonntag and DIE ZEIT
- All print 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. Travel articles of the printed edition are only rarely reproduced from the digital version, as there are often independent editorial teams.

Magazines

- About 1,600 titles – more than 26.8 million Germans read a magazine several times a week 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: “Reisen exclusive” (95,000), Reise und Preise” (71,154), “Geo Saison” (53,827), “ADAC Reisemagazin” (49,145), “Lonely Planet Traveller Magazine” (50,000)

Ongoing trend topics:

- Magazines with the highest circulation are TV magazines such as tv14, TV Digital and TV direkt
- Country-style magazines are also a great media platform; the market leader is “Landlust” (approx. 740,000 sold copies and among the Top10 in reach nationwide)
- DIY, “Green Lifestyle”, and interior design magazines such as H.O.M.E, Hygge, Ma Vie or Flow
- Food & Drink magazines for a younger audience (Food & Travel, Foodie etc.) which often offer cross media content

Source: Statista Verkaufte E-Paper Auflagen der Zeitungen in Deutschland vom 2. Quartal 2015 bis zum 2. Quartal 2019, Ivw Digital 2019, BDZV - Bundesverband Digitalpublisher und Zeitungsverleger e.V. 2020, VAUNET Verband Privater Meden 23 October 2020, Statista 20 November 2020

3.4 Reaching the consumer: online media

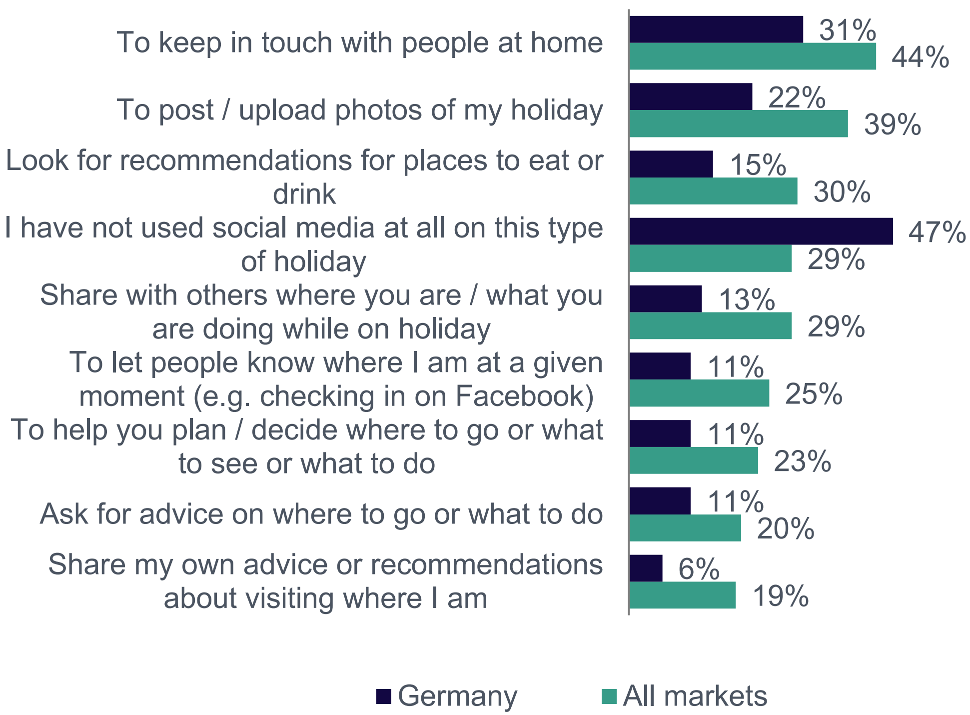
Online media

- Growing usage of apps and mobile enabled websites
(MEW) resulted in an increase in the number of registered online media: these are a mixture of "classic" online media suppliers and online versions of traditional media (content mostly behind paywalls), apps or MEWs (ausweisung.ivw-online.de).
- Print goes digital:
  - E-paper circulation of 2.1 million in the third quarter of 2020 (growing trend)
  - Websites, apps or ePapers of daily newspapers were the most frequently used source of information within the 14-29-year-olds segment in 2020 (around 33%)
- Travel blogs are less popular than in other European countries with a limited number of them available. The German language can act as a barrier to obtaining a large global following.

Source: Ivw Digital 2019, Statista 20 October 2020

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

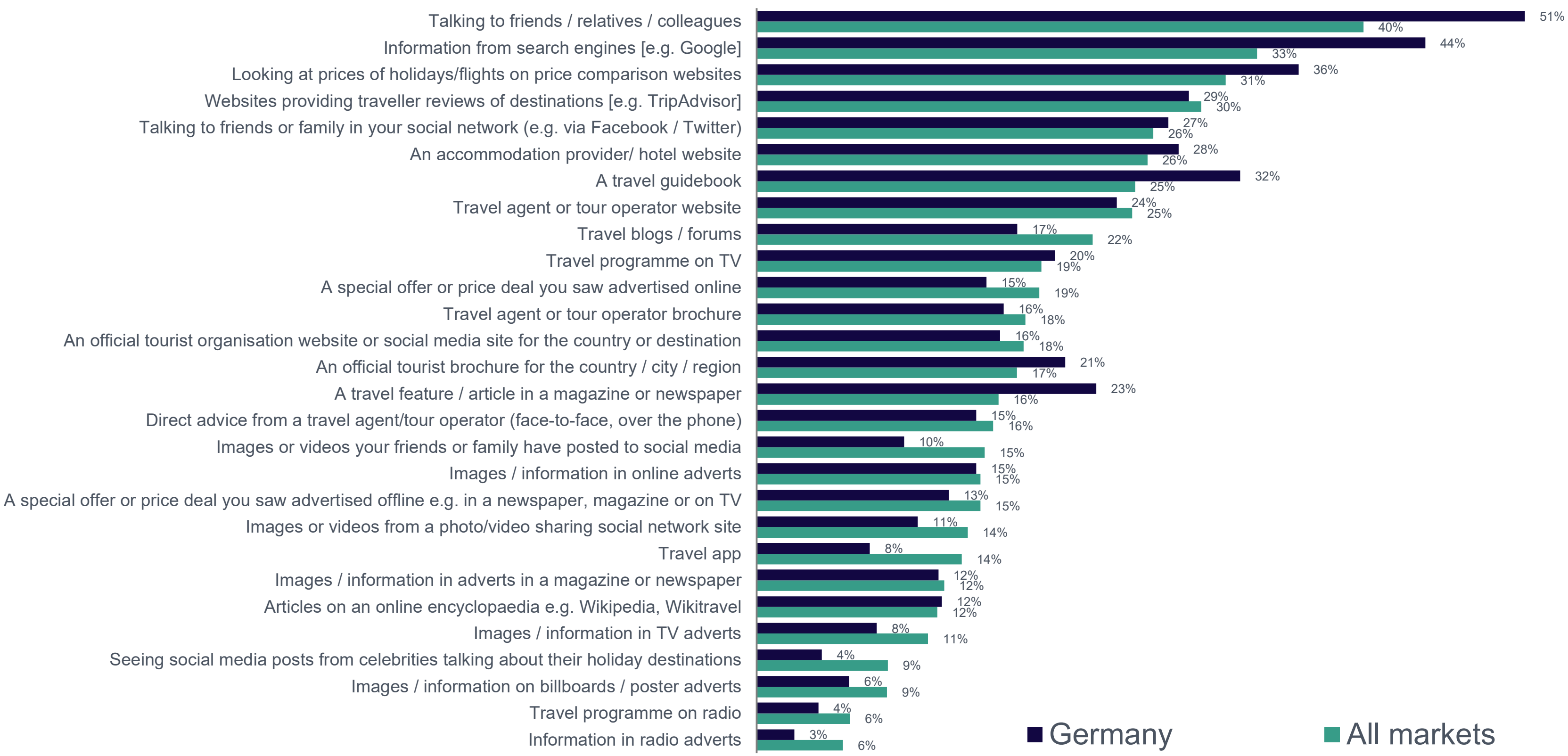


- Germans tend to have below-average usage of social media (whilst on holiday) but still roughly one in three use it to keep in touch with people at home and one in five use it to post or upload photos of their holiday.
- The social media channels most used in the German market include Whatsapp, Youtube, Facebook, Instagram, Facebook-Messenger, Pinterest and Twitter. Their popularity as a source of travel information and inspiration is stronger among younger age groups.
- 63% of Germans regard a smartphone as essential whilst they are on holiday.
- 84% of Germans love to take photos when they are on holiday 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 holiday 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)?, We are Social Hootsuite Digital 2020 Germany

Reaching the consumer: influences

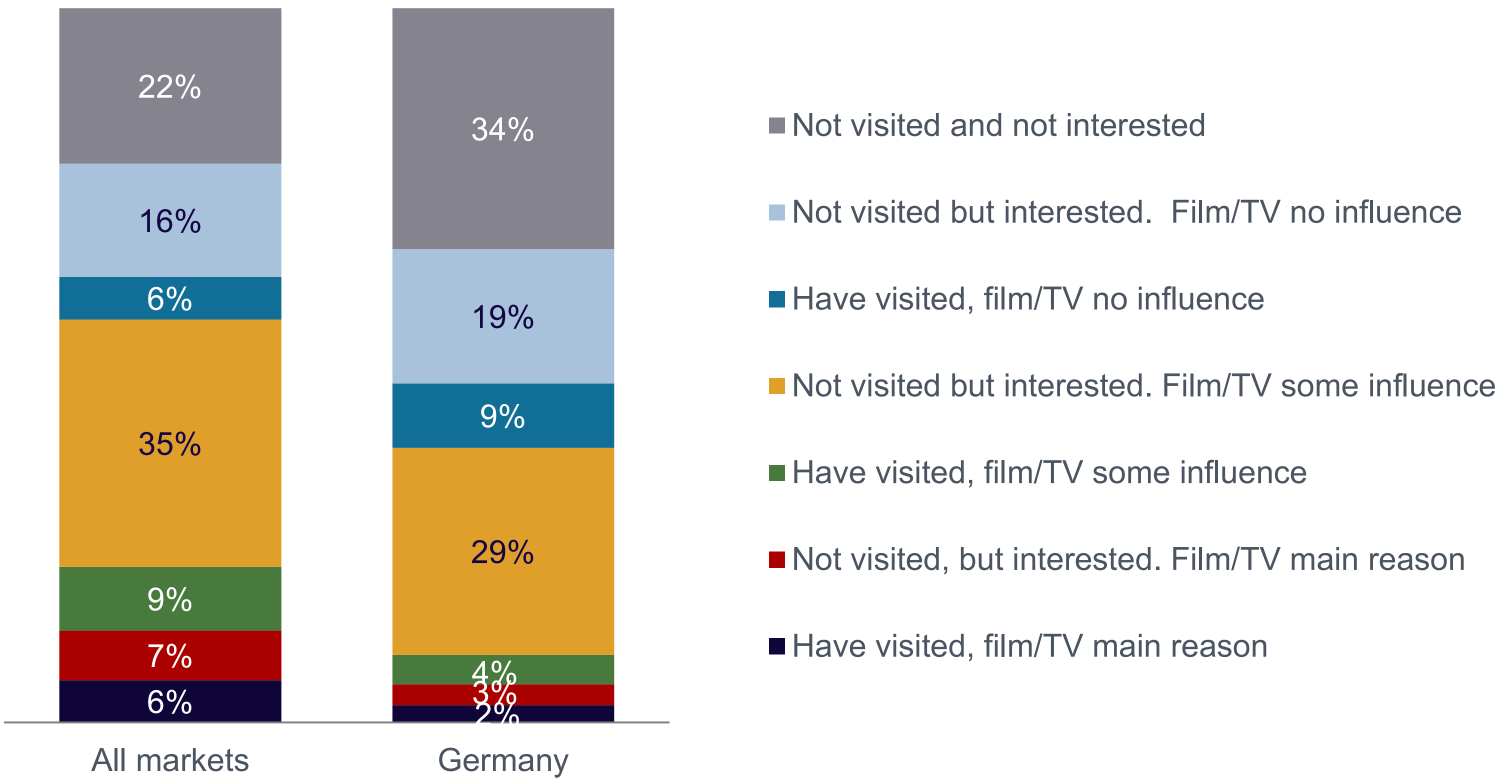
Influences on destination choice



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)

3.4 Reaching the consumer: draw of movie, TV or literary settings

Likelihood to visit a place featured in a movie, TV series or book



Source: Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?

Chapter 4:

Access and travel trade

4.1 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 steadily increased until 2018, was slightly down in 2019 and saw a steep decline in 2020 as a result of the Coronavirus pandemic.
- 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 a summer schedule.

Source: Apex: non-stop flights only, International Passenger Survey by ONS

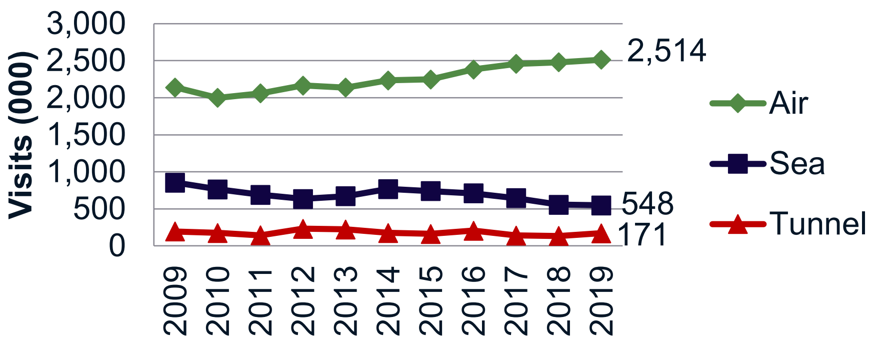
78%
(a growing proportion) of German visits travel to the UK by plane

Access to Britain

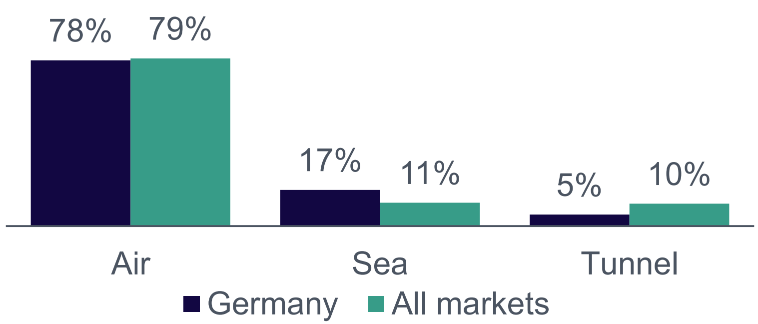
Measure	2019
Weekly aircraft departures	1,174
Weekly seat capacity	178,050
Airports with direct routes in Germany	20
Airports with direct routes in the UK	21

4.1 Access: mode of transport

Visits by mode of transport

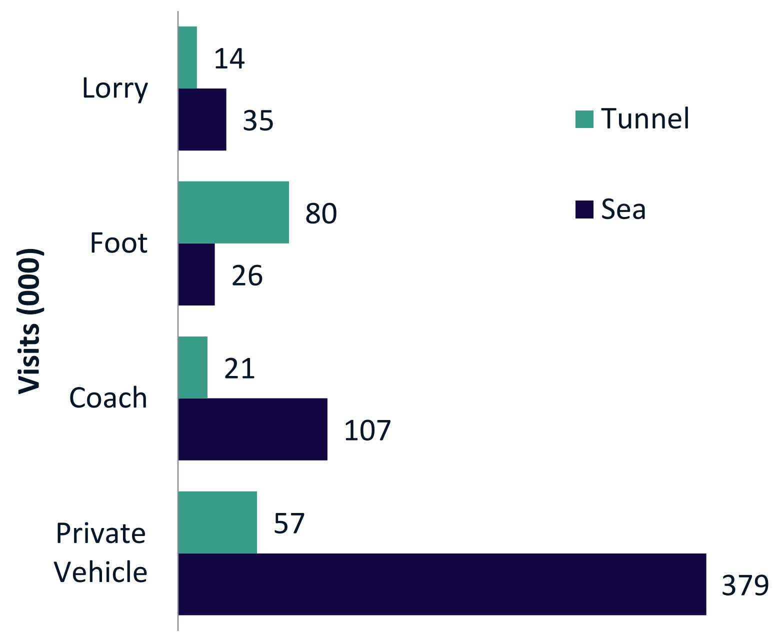


Annual share by mode (2019)



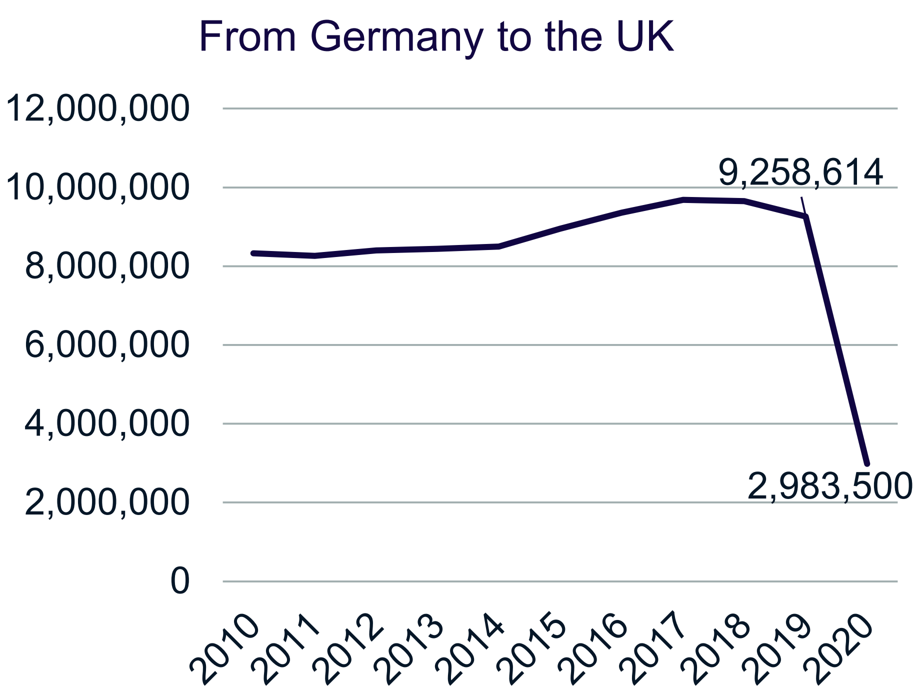
Source: International Passenger Survey by ONS

Sea and tunnel travel (000s) in 2019

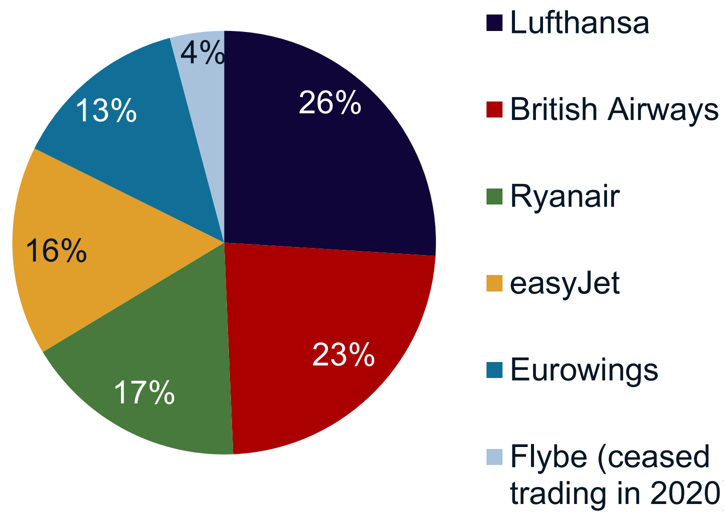


4.1 Access: capacity (1)

Annual airline seat capacity trends



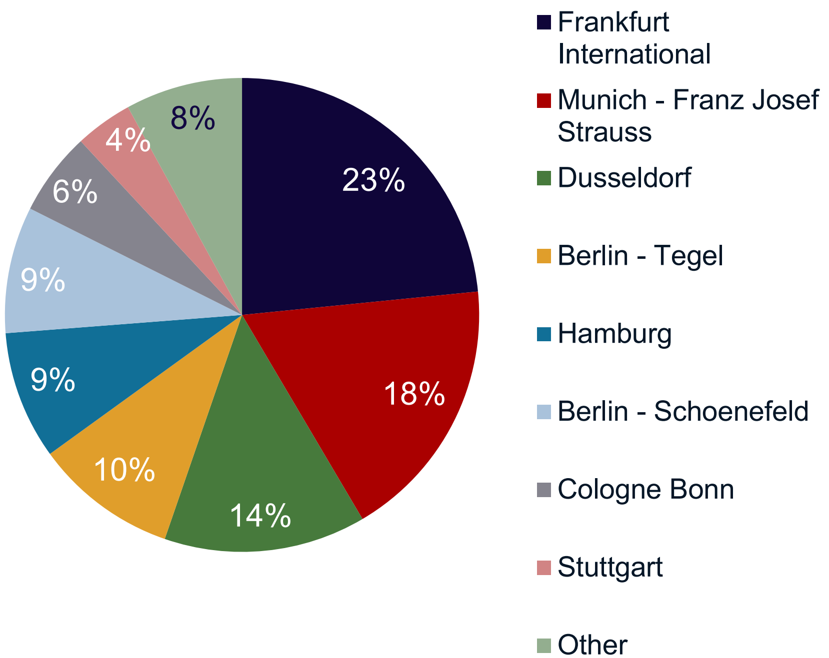
Airline annual seat capacity by carrier (2019)



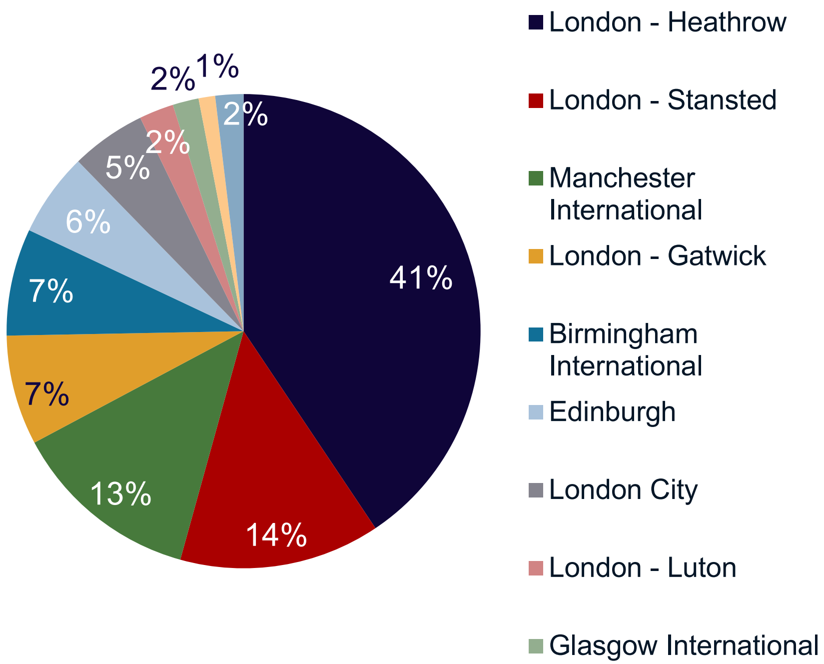
Source: Apex: non-stop flights only

4.1 Access: capacity (2)

Origin airport annual seat capacity (2019)



Destination airport seat capacity (2019)



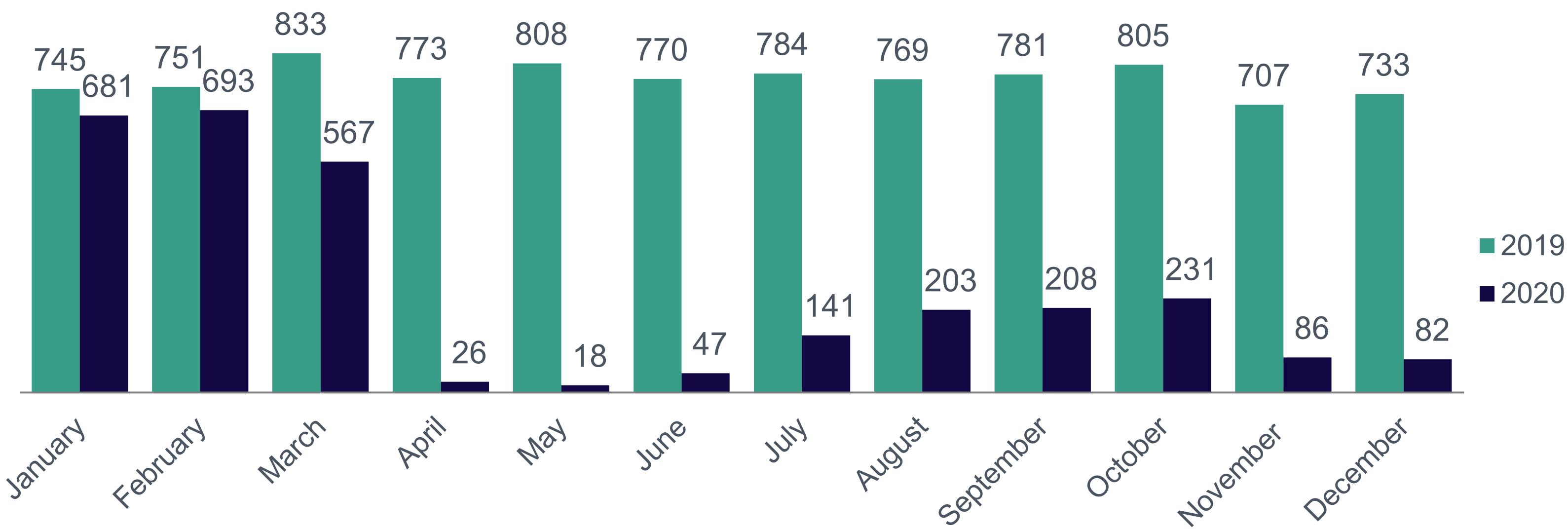
Other airports include: Hanover, Dortmund, Nuremberg, Bremen, Karlsruhe/Baden-Baden, Memmingen, Dusseldorf – Niederrhein, Frankfurt – Hahn, Friedrichshafen, Leipzig/Halle, Dresden, Paderborn/Lippstadt
Source: Apex: non-stop flights only

Other airports include: Newcastle, Liverpool, East Midlands, Leeds/Bradford, Southampton, Belfast International, Jersey, Cardiff, London Southend, Cornwall Airport Newquay, Guernsey

4.1 Access: impact of the COVID-19 pandemic

Impact of the COVID-19 pandemic on connectivity

Monthly seat capacity on flights from Germany to the UK (000s)



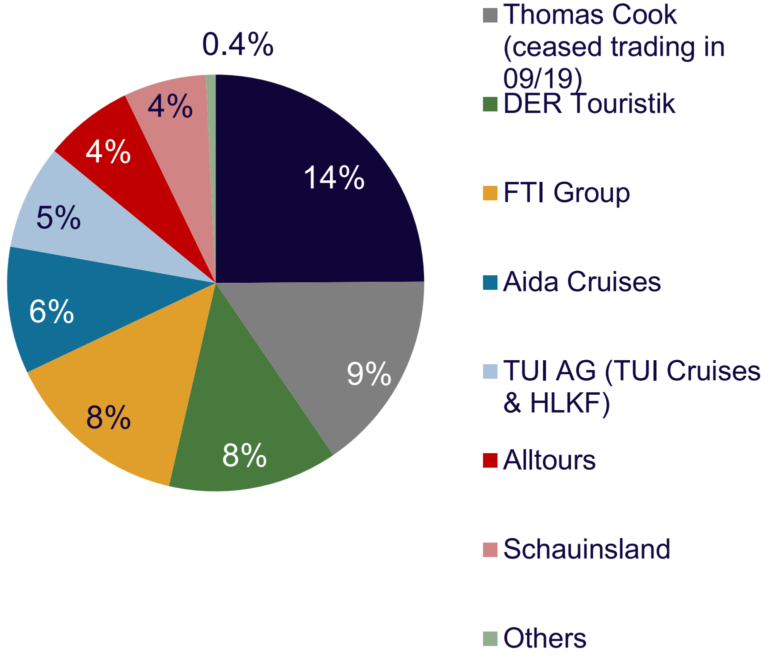
- Seat capacity on non-stop flights between Germany and the UK declined by 68% in 2020 compared to 2019 as a result of the COVID-19 pandemic. The impact was felt since March 2020, and monthly seat capacity was at least 70% behind 2019 levels in subsequent months.
- The effect of the pandemic was also felt severly in Channel Tunnel and sea connectivity.

Source: Apex, non-stop flights only

4.2 Travel trade: general overview

- The German travel market is very mature. The top three players held about half of the market share. Medium-size and cruise operators have seen strong growth in the past few years. The bankruptcy of Thomas Cook eliminated one of the big players in the German market in September 2019.
- 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. However, especially for booking of individual elements (e.g. transport and accommodation), online booking channels are also seeing strong growth.
- Growth rates of OTAs have slowed down in the past two years.

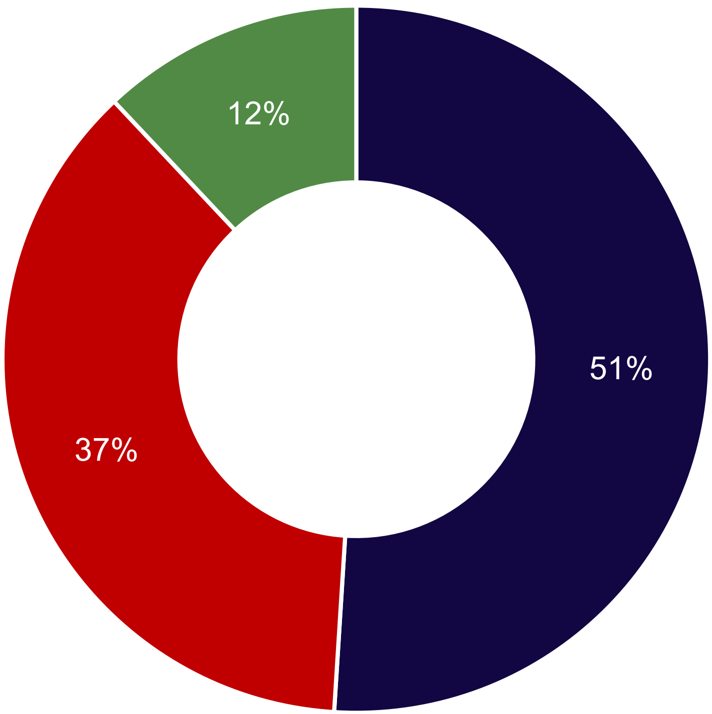
Market share by turnover 2018/19



Source: fvw Dossier, Veranstalter – Dossier 2020, February 2020

4.2 Travel trade: share of bookings revenue (holidays/private trips)

Share of total bookings revenue of €76.2bn in 2019



- €35.4bn - Tour operators/travel agents
- €25.7bn - Service providers (on- and offline) incl. airlines, rail, car hire, hotels, coach, event providers etc.
- €8.3bn - Online portals and others (incl. websites which offer at least one product type e.g. hotel, flight or car hire websites)

Source: GfK Mobilitätsmonitor (services booked prior to departure for holidays or other private trips with at least one overnight

4.2 Travel trade: German tour operators

Top ten operators in Germany in 2019

Top Ten Tour Operators	Turnover €m	Pax
TUI Deutschland	5.807,5	7.330,400
DER Touristik	3.440,0	6.000,000
Thomas Cook Group	3.360,0	5.840,000
FTI Group	3.200,0*	5.100,000*
Aida Cruises	2.110,0*	1.290,000*
Alltours Flugreisen	1.450,0*	1.730,000*
TUI Cruises	1.445,0*	619,000*
Schauinsland-Reisen	1.370,0	1640,000*
Hotelplan Suisse (CH)	520,2	486,000
Phoenix Reisen	409,9	195,928

The major tour operators with a comprehensive Britain programme are:

DERTOUR

Owned by DER Touristik

WOLTERS REISEN World of TUI

Owned by TUI Deutschland

Studiosus

Source: fvw Dossier, Veranstalter – Dossier 2020, February 2020 * Including turnover for Germany, Austria & Switzerland (DACH)

4.2 Travel trade: online travel companies

Top ten online travel companies

Company Name	Turnover 2019 (€m)*	Platform(s)
Booking Holdings	3,440.0	Booking.com, Agoda.com, Rentalcars.com
Check 24	2,930.0	Check24.de
Expedia Group	1,670.0	Expedia.de, Hotels.com, ebookers.de
Invia Germany	1,150.0	Ab-in-den-Urlaub.de, Fluege.de, Reisen.de, Flug24.de
Holidaycheck	1,035.0	Holidaycheck.de
TUI Deutschland	1,000.0	TUI.com, TUIfly.com, Ltur.com, Airtours.de
Edreams Odigeo	960.0	Opodo.de, Edreams.de, Travellink.de
HRS	800.0	HRS.de, Hotel.de, Tiscover.de
LM Group	600.0	Weg.de, Lastminute.de, Bravofly.de,
Airbnb	550.0	Airbnb.com

Source: fvw Dossier, Deutscher Reisevertrieb 2019, June 2020, *estimated figures

4.2 Travel trade: German holidays

Public and local holidays

National public holidays in 2021

Date	National Holiday
1 January	New Year's Day
2 April	Good Friday
5 April	Easter Monday
1 May	Labour Day
13 May	Ascension Day
24 May	Whit Monday
3 October	Day of German Unity
25-26 December	Christmas

Local Holidays in 2021

Date	Local Holiday	Federal State
6 January	Twelfth Day	Baden-Württemberg, Bavaria, Saxony-Anhalt
8 March	International Women's Day	Berlin
3 June	Corpus Christi	Baden Württemberg, Bavaria, Hesse, North Rhine-Westphalia, Rhineland-Palatinate, Saarland
15 August	Assumption Day	Bavaria, Saarland
20 September	World Children's Day	Thuringia
31 October	Reformation Day	Brandenburg, Bremen, Hamburg, Mecklenburg-Pomerania, Lower Saxony, Saxony-Anhalt, Schleswig-Holstein, Thuringia
1 November	All Saints Day	Baden-Württemberg, Bavaria, North Rhine-Westphalia, Rhineland-Palatinate, Saarland
17 November	Repentance Day	Saxony

Source: Officeholidays.com

4.2 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 in normal times. During the pandemic it is not recommended. 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 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.

4.2 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 (virtual in 2021), Best of Britain, BIM Marketplace, VisitScotland Expo and ITB (virtual in 2021). 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.

4.2 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?”

4.3 Caring for the consumer

Caring for the consumer:

- Germans appreciate the friendliness of their hosts with three in five stating that the British exceeded their expectations on this attribute.
- About three in five German leisure visitors found that the quality of tourist attractions also exceeded their expectations.
- Very few German visitors expect their British hosts to speak German, with the majority of younger Germans speaking English. Older age groups often appreciate information in their native language.
  For about a third of Germans signs/info in their own language fell below expectations.
- 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'. The quality of accommodation fell short for about one in five Germans when asked about their expectations.
- German vegetarians are often impressed by the range of choices on offer in Britain.

Source: CAA Passenger Study 2015, Q: "Did the following elements exceed, meet or fall below your expectations?" Base: leisure visitors. Germany=336

Appendix

Useful links and further information

Appendix 1: Working with VisitBritain (1)

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 partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- 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)

or VisitBritain shop team (Email: product@visitbritain.org)

Appendix 1: Working with VisitBritain (2)

Visit Britain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our **'I Travel For…'** marketing campaign.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund (visitbritain.org/discover-england-fund)

To find out more information, browse:

VisitBritain's mission (visitbritain.org/overview)

The Government's Tourism Action Plan (visitbritain.org/governments-tourism-action-plan)

VisitBritain's events (visitbritain.org/opportunities)

'I Travel For…' campaign (visitbritain.org/i-travel-for)

The tourism sector deal (visitbritain.org/industrial-strategy-tourism)

Appendix 1: Working with VisitBritain (3)

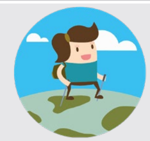
VisitBritain's global audience segments

From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers' market. On the right is a summary of VisitBritain's 5 global audience segments. To learn more visit:

visitbritain.org/understanding-our-customers

In Germany, VisitBritain focuses on two audience segments among the international travellers:

- **Buzzseekers in Germany:** active, enjoy foreign cultures. Motivated by cultural attractions, ease of access, vibrant cities and a variety of places to visit.
- **Explorers in Germany:** mature and open-minded with high interest in culture, arts and history. Enjoy a variety of holidays from seaside, lakes & mountains to gentle activities.

Segments (& global attributes)	Global market share	Market share in Germany
 **Buzzseekers** (free spirited and spontaneous, they like holidays full of action and excitement)	38%	22%
 **Explorers** (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	38%
 **Adventurers** (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	14%
 **Sightseers** (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	16%
 **Culture Buffs** (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	9%

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

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
- Inbound activity data visitbritain.org/activities-undertaken-in-Britain
- Sector-specific research visitbritain.org/sector-specific-research
- 2021 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)

Appendix 2: Useful research resources (2)

We have dedicated market-specific research and insights available which include:

- COVID-19 consumer sentiment tracker visitbritain.org/inbound-covid-19-sentiment-tracker
- Perceptions of Britain overseas visitbritain.org/Britain’s-image-overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain 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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Appendix 3: Definitions, sources and information on this report (1)

How to read the information in this market profile (1)

Details on main sources

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse: visitbritain.org/about-international-passenger-survey
- **Oxford Economics** tourism forecasts are from the 7 December 2020 update of the 'Global Travel Service' databank. Other information on Germany and the Eurozone were updated 9 February 2021.
- **Apex** data was last updated with December 2020 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, January 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Anholt-Ipsos Nation Brands Index** (NBI) was carried out online in July/August 2020 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples.

Appendix 3: Definitions, sources and information on this report (2)

How to read the information in this market profile (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2007 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

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