



Insight Department:  
Germany Factsheet | 2022

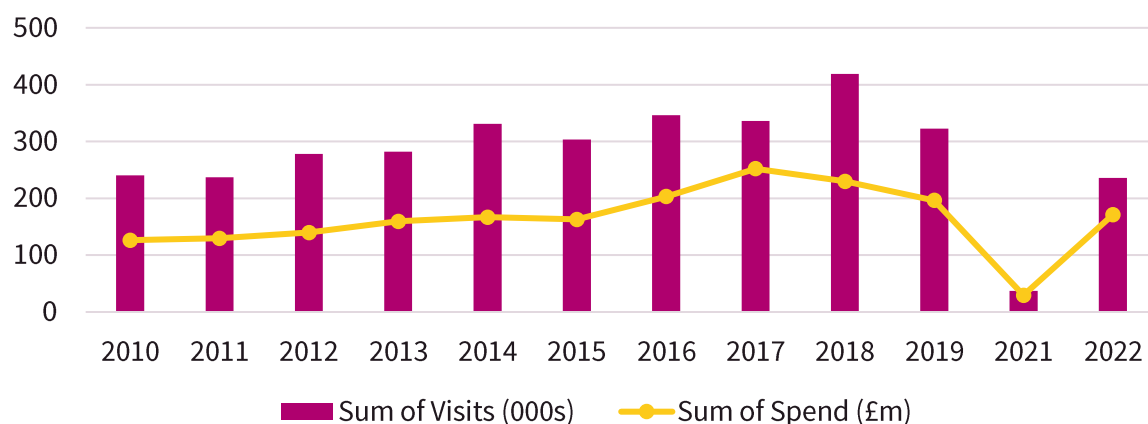
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## INSIGHT DEPARTMENT: GERMANY FACTSHEET 2022

In 2022, Germany was Scotland's third largest international source market by number of visits, fourth by expenditure and third by number of nights. German visitors accounted for 7% of all overseas visits and 5% of all overseas spend in Scotland. Although 2022 was the first full year where there were no travel restrictions from Europe due to the COVID-19 pandemic, the volume of visits was lower than pre-pandemic times, as was spend.

### Visits and spend over time



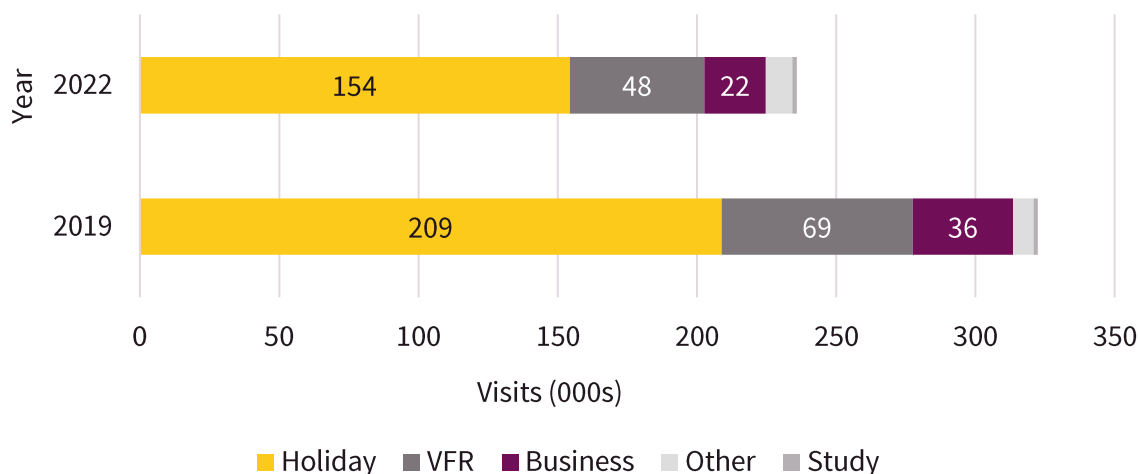
The total number of visits decreased by 27% from pre-pandemic levels, reaching a record low over the last decade (excluding 2021). Despite this, the total nights only declined by 11%, while total tourism expenditure declined by 13%. This could be due to a shift in behaviour from the pandemic which saw Germans being encouraged to partake in domestic tourism within Germany and closer bordering countries.

Year	Visits	Nights	Spend (£m)
2019	322,000	2,228,000	196
2022	236,000	1,975,000	171
Change	-27%	-11%	-13%

Despite an overall reduction in the visits, nights and spend in 2022 versus 2019, visitors from Germany stayed for longer periods (8.4 nights) and spent £117 more per visit. The spend per night only marginally decreased by 2%. This indicates a behavioral shift in the German market towards taking less frequent but longer visits to Scotland.

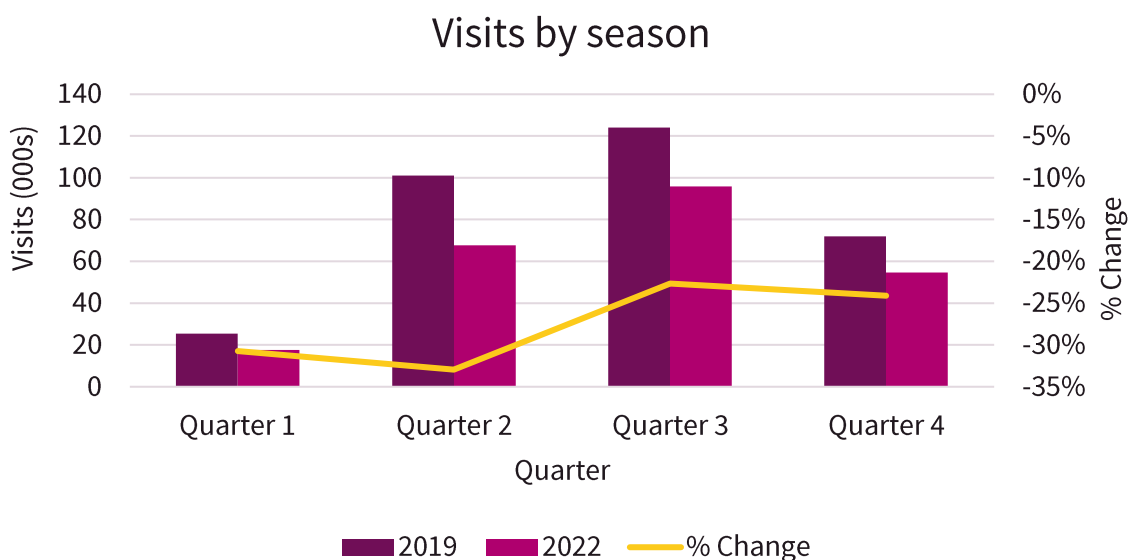
Year	Spend/visit	Nights/visit	Spend/night
2019	£609	6.9	£88
2022	£726	8.4	£87
Change	19%	22%	-2%

## Visits by purpose of visit



Around two-thirds of all visits were for the purpose of taking a holiday, while one-fifth were to visit friends or relatives, and just 9% for business. Compared to pre-pandemic times, there has been very little shift in the reasons why German visitors travel to Scotland. Business travel decreased from 11% to 9% since 2019, whilst visits in the “other” category increased from 2% to 4% - this includes visits such as medical and religious tourism visits.

Purpose of visit	2019 visits (000s)	Visitor proportion (%)	2022 visits (000s)	Visitor proportion (%)
Business	36	11%	22	9%
Holiday	209	65%	154	65%
VFR	69	21%	48	20%
Study	1	0%	2	1%
Other	7	2%	10	4%



In 2022, the seasonality of visits to Scotland by German visitors followed an almost identical pattern as that of 2019, increasing in Q2 and Q3 before dipping in Q4. 41% of all visits in 2022 took place during the third quarter of the year, between July and September, while in 2019, Q3 saw 38% of all visits. The overall trend versus 2019 therefore remained relatively flat despite the decrease in overall visits.

Season	2019 visits (000s)	Visitor proportion (%)	2022 visits (000s)	Visitor proportion (%)
Quarter 1	25	8%	18	7%
Quarter 2	101	31%	68	29%
Quarter 3	124	38%	96	41%
Quarter 4	72	22%	55	23%



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## About this data

All data is sourced from the International Passenger Survey by the Office for National Statistics. Refer to the [ONS website](#) for more on IPS methodology.

## Important Notice On Continued Impact of COVID in relation to IPS Data Collection

The International Passenger Survey (IPS) was suspended on 16 March 2020 due to the coronavirus (COVID-19) pandemic. Interviewing initially began at UK airports at the start of 2021, though the IPS remained suspended at some seaports and train stations during the year. To produce statistics for the periods impacted the Office for National Statistics (ONS) have applied the following processes to the data since March 2020:

- **March 2020** - With the data collected for most of March when the IPS was running the ONS had part of the data needed for the month. To produce estimates for the full month of March the ONS worked on the assumption that passenger characteristics in the second, unsampled, half of the month were represented by those sampled in the first half.
- **April – December 2020 (Q2, Q3, Q4 2020)** - The travel and tourism figures for this period are based entirely on administrative sources and modelling as no data was collected during this period.
- **2021** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) in Q4 2021 due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for this quarter. Data for those travelling via Dover was only collected from Q3 2021. In addition, no estimates are included for any travel across the Irish border. Please see [visitbritain.org](https://www.visitbritain.org) for more information.
- **January to June 2022** – The ONS were unable to restart interviewing at Eurotunnel (but continued at Eurostar) during this period due to COVID-19 restrictions. The ONS has used passenger numbers to model the Eurotunnel data for Q1-Q2 2022. The ONS restarted IPS interviews at all ports from July 2022. Please see [visitbritain.org](https://www.visitbritain.org) for more information.

Please refer to the [ONS website](#) for the official release and more information on IPS methodology and UK outbound travel and for Full Year 2022 details are on this [ONS page](#).

## Appendix

International Passenger Survey 2022

### USING AND INTERPRETING STATISTICAL DATA

Sources: Data is sourced from the Office for National Statistics' International Passenger Survey (IPS).

Information about the survey can be found on the VisitBritain website

[www.visitbritain.org](http://www.visitbritain.org) (Insights & Statistics section) or the Office for National Statistics website [www.statistics.gov.uk/hub/index.html](http://www.statistics.gov.uk/hub/index.html).

**Sample Sizes:** Some analysis within this report may be based on small sample sizes. Before using the data, it is important to recognise the limitations of using a small sample size. Further information, including methodology and sample sizes, can be found on the VisitBritain website [www.visitbritain.org](http://www.visitbritain.org) (Insights & Statistics section).

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