Insight Department:
German Visitors
to Scotland

September 2018
The ‘German Visitors to Scotland’ factsheet provides the latest data and trends on the volume and value of visitors from Germany to Scotland from the International Passenger Survey (IPS). This factsheet also provides information on the latest consumer trends and attitudes.

A Typical Visitor from Germany to Scotland

- **A destination for “romantic adventurers”** who can venture off the beaten track and best enjoy Scotland through walking and exploring. Generally, Scotland is viewed as a country of great natural beauty, rich in history and culture. Its reputation for vast, unspoilt landscapes is a motivational visiting factor for the majority of German visitors.

- The classic beach holiday remains popular with the German market. However, German travellers are also keen tourers and many visiting Scotland are keen to explore many parts of the country when here.

- Viewed as a unique and authentic holiday experience, Scotland also offers a German visitor the chance to get away from everyday life and discover something new.

- The typical German visitor is likely to be between the ages of 34 and 54, in full-time employment and travelling with a spouse or partner. A significant proportion of German visitors are also within the 16-34 age group (typically a higher proportion in contrast to long haul markets).

- Many will be visiting from the conurbations of Germany. Key source markets include North-Rhine-Westphalia, Bavaria, Baden-Württemberg, Hesse and Lower Saxony.

- Most will be visiting Scotland for the first time. They will often tour a number of areas in Scotland, enjoying cities, landscapes and historical attractions.

- They expect diversity in Scotland’s offering, and will also want to sample what the country has to offer in urban culture, such as traditional pubs and local events.

- When in Scotland, hotels have a great appeal but also B&Bs and guesthouses are popular with German visitors as the opportunity to interact with local hosts appeals.
## Visitors from Germany to the UK and Scotland in 2017

### Key Facts

<table>
<thead>
<tr>
<th>Indicators</th>
<th>UK</th>
<th>Scotland</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total visits</td>
<td>3,380,000</td>
<td>372,000</td>
</tr>
<tr>
<td>Visits by purpose*</td>
<td>47% Holiday, 25% Business, 23% VFR</td>
<td>68% Holiday, 16% VFR, 14% Business</td>
</tr>
<tr>
<td>Total nights</td>
<td>19,232,000</td>
<td>2,609,000</td>
</tr>
<tr>
<td>Total spend</td>
<td>£1,579m</td>
<td>£285m</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>5.7 nights</td>
<td>7 nights</td>
</tr>
<tr>
<td>Average spend per day</td>
<td>£82</td>
<td>£109</td>
</tr>
<tr>
<td>Average spend per visit</td>
<td>£467</td>
<td>£767</td>
</tr>
</tbody>
</table>

*3 year average (2015-2017)
Source: IPS, 2017

In 2017, Germany was the UK’s
- 3rd largest source market measured by number of visits
- 3rd largest by number of nights
- 2nd largest by expenditure

In 2017, Germany was Scotland’s
- 2nd largest source market measured by number of visits
- 2nd largest by number of nights
- 2nd largest by expenditure
Visitors from Germany to Scotland Compared to Other Overseas Markets:

<table>
<thead>
<tr>
<th></th>
<th>TRIPS 000s</th>
<th>%</th>
<th>SPEND £m</th>
<th>%</th>
<th>NIGHTS 000s</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>566</td>
<td>18%</td>
<td>556</td>
<td>24%</td>
<td>4,949</td>
<td>20%</td>
</tr>
<tr>
<td>Germany</td>
<td>372</td>
<td>12%</td>
<td>285</td>
<td>13%</td>
<td>2,609</td>
<td>11%</td>
</tr>
<tr>
<td>France</td>
<td>206</td>
<td>6%</td>
<td>106</td>
<td>5%</td>
<td>1,764</td>
<td>7%</td>
</tr>
<tr>
<td>Australia</td>
<td>157</td>
<td>5%</td>
<td>134</td>
<td>6%</td>
<td>1,510</td>
<td>6%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>157</td>
<td>5%</td>
<td>93</td>
<td>4%</td>
<td>776</td>
<td>3%</td>
</tr>
<tr>
<td>Irish Republic</td>
<td>128</td>
<td>4%</td>
<td>35</td>
<td>2%</td>
<td>405</td>
<td>2%</td>
</tr>
<tr>
<td>Norway</td>
<td>123</td>
<td>4%</td>
<td>68</td>
<td>3%</td>
<td>892</td>
<td>4%</td>
</tr>
<tr>
<td>Spain</td>
<td>122</td>
<td>4%</td>
<td>109</td>
<td>5%</td>
<td>602</td>
<td>2%</td>
</tr>
<tr>
<td>Italy</td>
<td>121</td>
<td>4%</td>
<td>74</td>
<td>3%</td>
<td>779</td>
<td>3%</td>
</tr>
<tr>
<td>Canada</td>
<td>115</td>
<td>4%</td>
<td>90</td>
<td>4%</td>
<td>1,063</td>
<td>4%</td>
</tr>
<tr>
<td>Rest of World</td>
<td>1,143</td>
<td>36%</td>
<td>726</td>
<td>32%</td>
<td>9,046</td>
<td>37%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,210</strong></td>
<td><strong>100%</strong></td>
<td><strong>2,276</strong></td>
<td><strong>100%</strong></td>
<td><strong>24,395</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Source: IPS, 2017
Latest Information
Visitors from Germany to Scotland

<table>
<thead>
<tr>
<th>INDICATORS</th>
<th>KEY FACTS</th>
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<tr>
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Source: IPS, 2017

Duration of stay

- 1-3 nights (19%)
- 4-7 nights (45%)
- 8-14 nights (27%)
- 15+ nights (10%)

Purpose of travel

- Holiday (68%)
- Business (14%)
- VFR (16%)

Seasonality

- Jan-Mar (9%)
- Apr-Jun (30%)
- Jul-Sep (43%)
- Oct-Dec (17%)

3 year average (2015-2017)
Source: IPS, 2017
Regions Visited

Visitor Heat Map

Darker areas = more visitors

<table>
<thead>
<tr>
<th>Top regions visited</th>
<th>Lothians</th>
<th>Highlands &amp; Islands</th>
<th>Greater Glasgow &amp; Clyde Valley</th>
</tr>
</thead>
</table>

Source: IPS, 2017
Trends Information
Visitors from Germany to Scotland

VISITORS FROM GERMANY TO SCOTLAND: 2008 - 2017

1. Total visit/nights/spend

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Total visits</td>
<td>257</td>
<td>236</td>
<td>255</td>
<td>250</td>
<td>281</td>
<td>293</td>
<td>343</td>
<td>323</td>
<td>355</td>
<td>372</td>
</tr>
<tr>
<td>(000s)</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Spend</td>
<td>94</td>
<td>135</td>
<td>134</td>
<td>139</td>
<td>143</td>
<td>167</td>
<td>174</td>
<td>175</td>
<td>212</td>
<td>285</td>
</tr>
<tr>
<td>(£m)</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total nights</td>
<td>1778</td>
<td>2360</td>
<td>2186</td>
<td>2287</td>
<td>1977</td>
<td>2019</td>
<td>2248</td>
<td>2390</td>
<td>2725</td>
<td>2609</td>
</tr>
<tr>
<td>(000s)</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Source: IPS, 2017
Visitors from Germany have grown year almost every year since 2011 and with it their expenditure in Scotland has also increased. Tourism expenditure has increased by 105% since 2011 and visitor numbers have increased by almost 49% over the same period.

The German market, like the rest of the Euro markets benefited from good exchange rates in 2017. This favourable exchange rate could have been behind the increase of average spend per trip of £597 in 2016 to £767 in 2017 and an overall growth in expenditure of 34% year-on-year.

Arriving to Scotland by sea grew in popularity in 2017, with a growth of sea travellers increasing by 16% in real terms between 2016 and 2017. Visitors that arrive by sea, generally bring their own cars or campervans and have a tendency to visit many places in Scotland which benefits a balanced regional spread.
How Visitors from Germany View Scotland

A holiday in Scotland is perceived to be one that will be unique, authentic, enriching, mystical and varied – an adventure. It is seen to offer the freedom to discover.

In research in 2015 which explored the key benefits of a holiday in Scotland, the following tangible and more emotional benefits of a holiday in Scotland stood out for German consumers.

| Scenery and Landscape | The openness, remoteness and ruggedness of Scotland’s vast landscape were perceived by German visitors to be strong benefits of a holiday in this country, in contrast to busy tourist filled beach destinations. Common associations which set Scotland apart from competitors include unspoilt landscape with a touch of mysticism, a mythical place. The richness of Scots history adds to the sense of “mysticism” and legend of the landscapes, in which there is much to be explored. |
| History and Culture | Scotland’s history and culture is viewed as a strong motivator to visit by the German market. They expect a richness of history and legend (a history & culture defined by strong and unique Scottish character inspired in part by images of *Highlander*, *Outlander* and *Braveheart*). |
| People | They expect to meet people who are proud of their history and do not pretend to be someone they are not. An authentic experience is important. They also expect interactions with friendly and hospitable people in Scotland to enhance their overall holiday experience. |
| Escape | The ability to “get away from it all” is seen a strong benefit of a holiday in Scotland. They expect to feel a contrast between Scotland and their everyday lives. |

“It’s all about 3 things for me - castles, hills and sea - I want to escape the city and be in the vast, open beautiful landscapes”

“The castles, the wildlife, the lakes, the pubs and the music”
INSIGHT DEPARTMENT: GERMAN VISITORS TO SCOTLAND

**MOTIVATIONS TO VISIT SCOTLAND**

- **Scenery & landscape 78%** (survey average 50%)
- **History & culture 53%** (survey average 33%)
- **Always wanted to visit 48%** (survey average 15%)
- **To visit cities 34%** (survey average 15%)
- **To get away from it all 30%** (survey average 23%)

Scotland’s beautiful scenery and landscape is a stronger motivator for German visitors in comparison to long haul markets, along with the history and culture. Scotland is often viewed as an ideal destination for travellers to venture off the beaten track and enjoy unspoilt landscape. This prompts the idea that they are able to “get away from it all”.

**CONNECTIONS TO SCOTLAND**

- **27%** of visitors from Germany had a connection to Scotland. The most common connections were:
  - Friends live in Scotland 9%
  - No personal connections but had visited many times 8%
  - Family live in Scotland 4%

Visitors from Germany and the European market tend to have lower personal connections to Scotland than long haul markets that may have ancestral links and family/friends in Scotland.

**TRANSPORT TO SCOTLAND**

- **50%** arrived by plane directly to Scotland. The most popular airports to arrive to were:
  - Edinburgh 78%
  - Glasgow 13%
  - Aberdeen 5%

- **10%** arrived by plane (indirect):
  - Amsterdam Schiphol
  - London Heathrow

Germans were more likely than others to travel to Scotland by boat/ferry **15%** (survey average 5%) and bring a motorhome/campervan **9%** (survey average 3%).

**PLANNING & BOOKING**

On average, visitors from Germany start to plan about 6 months ahead. They tend to plan further ahead than the Southern European markets.

- **Planning:** 25.9 weeks
- **Travel booking:** 16.7 weeks
- **Accommodation booking:** 14.0 weeks

Visitors from Germany are likely to use multiple types of information in planning their holiday, particularly websites and talking with friends and family. They are also much more likely than average to rely on printed travel guide books (e.g. Lonely Planet, Rough Guide, Fordors).

Source: Scotland Visitor Survey 2015/2016
# TOP 5 ACTIVITIES IN SCOTLAND

<table>
<thead>
<tr>
<th>Activity</th>
<th>Germany</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited cathedral, church</td>
<td>78%</td>
<td>46%</td>
</tr>
<tr>
<td>Visited castle/historic house</td>
<td>84%</td>
<td>60%</td>
</tr>
<tr>
<td>Visited cities</td>
<td>79%</td>
<td>42%</td>
</tr>
<tr>
<td>Sightseeing by car/coach/on foot</td>
<td>85%</td>
<td>74%</td>
</tr>
<tr>
<td>Centre based walking (i.e. around a town centre)</td>
<td>72%</td>
<td>45%</td>
</tr>
</tbody>
</table>

Visitors from Germany enjoy undertaking a large range of activities during their break in Scotland. They enjoy walking and include it as part of their itinerary. This is reflected in above average scores on activities that involve sightseeing, walking and touring historical attractions.

Further down the list of activities, but notably higher for visitors from Germany than others were:

- Visited a TV/film location 16%
- Attended Highland Games 17%

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# ACCOMMODATION

<table>
<thead>
<tr>
<th>Accommodation Preferences:</th>
<th>Germany</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel</td>
<td>43%</td>
<td>41%</td>
</tr>
<tr>
<td>B&amp;B/GH</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>Self-catering</td>
<td>20%</td>
<td>22%</td>
</tr>
<tr>
<td>Friends/family</td>
<td>14%</td>
<td>19%</td>
</tr>
<tr>
<td>Camping</td>
<td>11%</td>
<td>6%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Aspects Important in Choosing Accommodation:</th>
<th>Germany</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>80%</td>
<td></td>
</tr>
<tr>
<td>Value for Money</td>
<td>64%</td>
<td></td>
</tr>
<tr>
<td>Availability of free Wi-Fi at accommodation</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Quality star grading</td>
<td>15%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Scotland Visitor Survey 2015/2016
Satisfaction with the Visitor Experience

In general, overall satisfaction rates for European visitors were slightly lower than ratings in comparison to long haul visitors. However, visitors from Germany record amongst the highest levels of satisfaction for overall visitor experience for the European markets.

### Satisfaction with the Visitor Experience

<table>
<thead>
<tr>
<th></th>
<th>MEAN</th>
<th>Top 2 Box (9 or 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall rating of Holiday Experience (scale 1-10)</td>
<td>9.0</td>
<td>68% (above average in Europe)</td>
</tr>
<tr>
<td>Likelihood to Recommend</td>
<td>9.2</td>
<td>75% (above average in Europe)</td>
</tr>
</tbody>
</table>

**56% strongly agree**
that ‘Scotland is a country worth visiting more than once’

**45% strongly agree**
they ‘really enjoyed finding out about the history and culture of the destination when they were on holiday’

**41% strongly agree**
that ‘they were made to feel welcome’

Areas of the visitor experience which recorded mean scores below 8 include:

- Mobile phone signal coverage
- Availability of 3G/4G
- Availability of free Wi-Fi
- Value for money of eating out
- Value for money of accommodation
- Availability of free Wi-Fi at accommodation
- Availability of local produce when eating out

Source: Scotland Visitor Survey 2015/2016
Popular media channels

Research with consumers from Germany on VisitScotland’s database has provided examples of key media channels used by these consumers.

**Key Websites Used**
- Google
- Web
- Facebook
- GMX
- T-Online
- Ebay
- Spiegel
- Yahoo
- Amazon
- Wikipedia
- Bild
- Wetter

**Key Social Media Accounts**
- Facebook
- Whatsapp
- YouTube
- TripAdvisor
- Google+
- Linkedin
- Instagram
- Twitter
- Pinterest

**Key Newspapers Read (online or print)**
- Süddeutsche Zeitung
- FAZ
- Bild
- Die Zeit
- Hamburger Abendblatt
- Rheinische Post

**Key Magazines Read (online or in print)**
- Spiegel
- Stern
- Focus
- Geo
- Brigitte

**Influential TV Programmes for Travel**
- Outlander
- Highlander
- Braveheart
- Harry Potter
- Rob Roy
- MareTV

Source: VisitScotland Research 2014-2017
INSIGHT DEPARTMENT: GERMAN VISITORS TO SCOTLAND

Current Connectivity

Direct to Edinburgh
- EasyJet
  - Berlin – Edinburgh (all year round)
  - Hamburg – Edinburgh (all year round)
  - Stuttgart – Edinburgh (all year round)
  - Munchen – Edinburgh (all year round)
- Eurowings
  - Munchen – Edinburgh (all year round)
  - Dusseldorf – Edinburgh (all year round)
  - Koln – Edinburgh (all year round)
- Lufthansa
  - Munchen – Edinburgh (all year round)
  - Frankfurt – Edinburgh (all year round)
- Ryanair
  - Baden – Edinburgh (all year round)
  - Berlin – Edinburgh (all year round)
  - Dusseldorf – Edinburgh (all year round)
  - Frankfurt – Edinburgh (seasonal)
  - Hamburg – Edinburgh (all year round)
  - Memmingen – Edinburgh (all year round)

Direct to Glasgow
- EasyJet
  - Berlin – Glasgow (all year round)
- Eurowings
  - Dusseldorf – Glasgow (all year round)
- Lufthansa
  - Munchen – Glasgow (all year round)
  - Frankfurt – Glasgow (all year round)
- Ryanair
  - Berlin – Glasgow (all year round)
Barriers to Travel

Although Scotland enjoys a positive image amongst visitors from Germany, we need to be aware of the range of barriers which may be in the minds of visitors when considering their holiday destination.

- Cost is considered a critical factor in choosing a holiday destination and some may perceive Scotland as being a more expensive choice with satisfaction of accommodation and food value for money being ranked below an 8 out of 10 within the Scotland Visitor Survey.

- Possible lack of awareness of different locales in Scotland, often perceived as “one destination” when there are many different regions and areas to discover.
APPENDIX:
International Passenger Survey 2017  
Civil Aviation Authority 2017

USING AND INTERPRETING STATISTICAL DATA

Sample Sizes: Analysis of sub-groups, such as trips by purpose or demographic group, relies on small sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a 3-year average instead of single-year data, have been used. 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 (Insights & Statistics section).

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