



# GERMANY MARKET PROFILE

Germany is the largest European and 2nd largest international source market in terms of numbers of visits and expenditure to Scotland. 52% of German holidays are booked via traditional travel trade (tour operator or travel agent).

(Source: DRV 2019)

## VISITS IN 2018

# 451,000

### VALUE

# £246M

### AVERAGE SPEND PER VISIT

# £546

Source: IPS 2018

## FLIGHTS

List contains seasonal and year-round flight routes

Salzburg (A)	●	Dusseldorf (DE)	● ●
Vienna (A)	●	Frankfurt (DE)	● ●
Basel (CH)	●	Hamburg (DE)	●
Geneva (CH)	● ●	Karlsruhe Baden-Baden (DE)	●
Zurich (CH)	● ●	Munich (DE)	●
Berlin SXF (DE)	● ●	Stuttgart (DE)	●
Cologne-Bonn (DE)	●		

### DESTINATIONS

● Edinburgh	● Aberdeen	● Glasgow	● Inverness
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### CONNECTING FLIGHTS

via Amsterdam Netherlands (NL) from 10 German airports

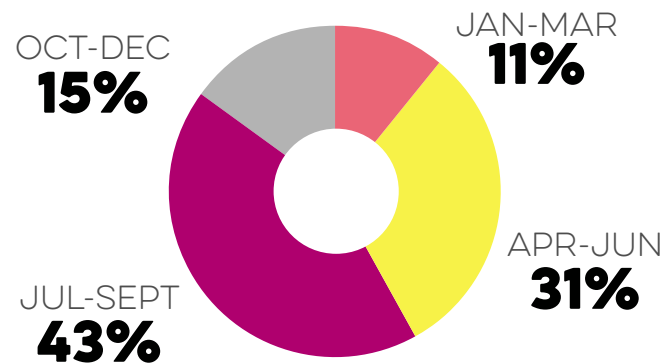


### FERRY ROUTES

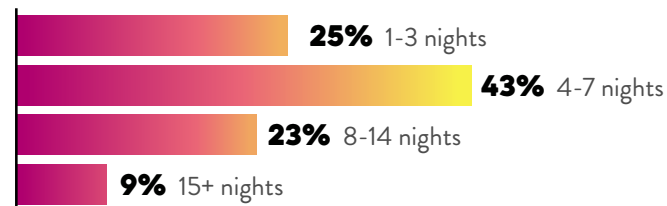
via Rotterdam, Zeebrugge and Amsterdam (NL) to British seaports



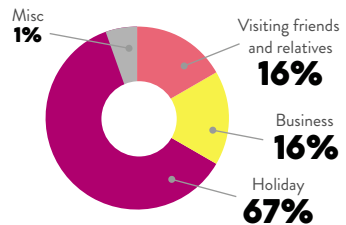
## SEASONALITY OF TRIP



## DURATION OF STAY



## PURPOSE OF TRAVEL



Source: Charts based on 3 year average IPS 2016-18

### TOP DRIVERS OR MOTIVATORS

- Scenery & Landscapes
- History & Culture
- "Always wanted to visit"

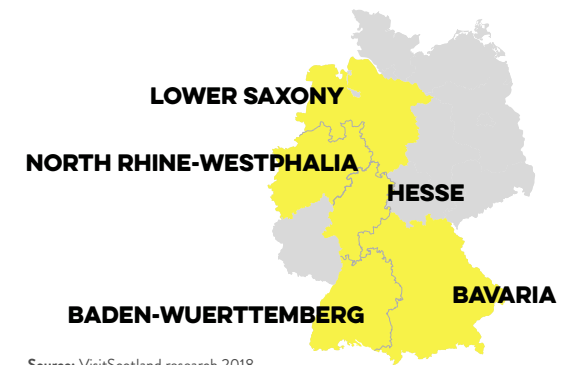
### TOP ACTIVITIES

Sightseeing by car, coach and on foot, visiting castles or historic houses and visiting cities.

Source: Scotland Visitor Survey 2015/16



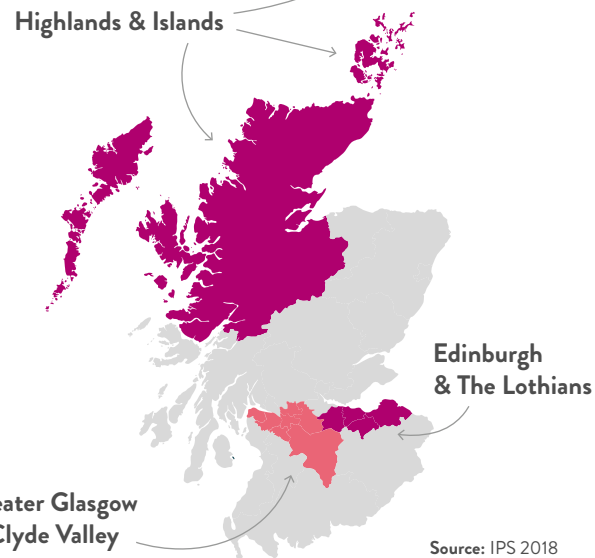
## ORIGIN OF VISITORS (TOP 5)



Source: VisitScotland research 2018

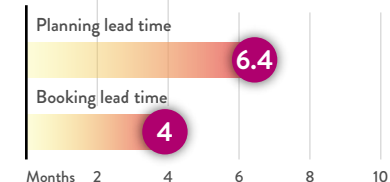


## MOST VISITED REGIONS



Source: IPS 2018

## PLANNING & BOOKING TIMELINE



Source: Scotland Visitor Survey 2015/16



## PRIORITY SEGMENTS

Explorers  
Buzzseekers

As per VisitBritain research

# CUSTOMER JOURNEY

Everyone has a bank of holiday hopes and ideas in their heads that bubble away, constantly being added to over time. It's almost like a holiday soup. When it comes to planning a holiday people take an idea from this soup and do some basic research to see if it's feasible.

If the idea doesn't suit, it goes back into the soup and they try another. Within this process, four main patterns of planning behaviour can be identified and these are what we are using to inform our website: [visitscotland.com](http://visitscotland.com)

