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

DESTINATIONS
- Edinburgh
- Aberdeen
- Glasgow
- Inverness

CONNECTING FLIGHTS
via Amsterdam Netherlands (NL) from 10 German airports

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

SEASONALITY OF TRIP

OCT-DEC 15%
JUL-SEPT 43%
APR-JUN 31%
JAN-MAR 11%

DURATION OF STAY

25% 1-3 nights
43% 4-7 nights
23% 8-14 nights
9% 15+ nights

PURPOSE OF TRAVEL

1% Visiting friends and relatives
16% Business
16% Holiday
67% "Always wanted to visit"

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.

PLANNING & BOOKING TIMELINE

<table>
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<tr>
<th>Months</th>
<th>Planning lead time</th>
<th>Booking lead time</th>
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As per VisitScotland research 2018

ORIGIN OF VISITORS (TOP 6)

LOWER SAXONY
NORTH RHINE-WESTPHALIA
HESSE
BAVARIA
BADEN-WUERTTEMBERG

MOST VISITED REGIONS

Highlands & Islands
Greater Glasgow & Clyde Valley
Edinburgh & The Lothians

EDINBURGH & THE CITY OF EDINBURGH
NORTH BERWICK & THE EAST COAST
THE HIGHLANDS & ISLANDS
THE LOCHS & Theatreland
GLASGOW & THE CLYDE VALLEY
SCOTLAND'S NORTH EAST
STIRLING & THE CENTRAL BELT
THE HIGHLANDS & ISLANDS

Origin of Visitors (Top 5)

Dusseldorf (DE)
Frankfurt (DE)
Hamburg (DE)
Karlsruhe Baden-Baden (DE)
Munich (DE)
Stuttgart (DE)

Connecting flights
Destinations via Amsterdam Netherlands (NL) from 10 German airports
Ferry routes via Rotterdam, Zeebrugge and Amsterdam (NL) to British seaports

Source: VisitScotland research 2018

Source: Scotland Visitor Survey 2015/16
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

### IDEA ACCUMULATION
Media & cultural influences
- Hearing about / looking at the holidays of friends and family

### CONCEPT FORMING
Going through available options and considering which best meet holiday needs
- Weighing up the feasibility and envisioning the trip

### CONCEPT BUILDING
Deciding whether to go ahead and book it, or leave it for another year
- Forming a whole picture of the desired trip

### EXECUTING THE PLAN
Building the holiday
- Book travel, accommodation and some activities that require pre-booking
- First stages of planning: taking time off, arranging pet care etc

### THE HOLIDAY
- Research attractions, activities and restaurants
- Share photos and “check ins” on social media
- Leave reviews

### MARKETING ACTIVITY
- VisitScotland paid media and PR
- VisitScotland email activity
- VisitScotland social channels
- VisitScotland and partner paid media and PR
- VisitScotland influencer / community activity
- VisitScotland.com
- VisitScotland paid search and SEO
- Intermediary inspiration activity
- VisitScotland emails
- VisitScotland social channels