

German Market Profile

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Size of the German market to the island of Ireland

	2006	2007	2008	2009	2010	2011	2012
Total visits (000)	432	464	470	425	399	431	451
Holiday visits (000)	259	334	314	252	231	244	282
Promotable visitors (000)	276	351	328	264	245	263	308
Revenue (€mn)	252	242	296	218	251	246	238
Revenue (£mn)	206	197	241	178	223	219	212

All Euro (€) / Sterling (£) conversions have been carried out at a rate of €1 = £0.815

(Revenue does not include carrier receipts or international air and sea fares)

Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)

Data sources: Tourism Ireland fact card 2012.

Holidaymakers at a glance ...

When do holidaymakers arrive?

Month Of Arrival	2006	2007	2008	2009	2010	2011
January - March	7%	9%	10%	9%	9%	14%
January	2%	3%	3%	2%	1%	2%
February	2%	1%	2%	2%	2%	2%
March	3%	4%	5%	5%	6%	9%
April	5%	10%	6%	8%	7%	9%
May	16%	14%	15%	18%	15%	15%
June	16%	15%	20%	14%	17%	16%
July	20%	15%	15%	15%	21%	15%
August	15%	15%	9%	16%	13%	12%
September	10%	9%	13%	9%	11%	8%
October	5%	11%	6%	9%	5%	8%
November	4%	2%	3%	2%	1%	3%
December	2%	1%	3%	0%	1%	1%
October - December	11%	14%	12%	12%	7%	12%







When did holidaymakers decide to visit?**

Month Decided to visit	2006	2007	2008	2009	2010	2011
Pre-September (previous year)	6%	10%	8%	6%	8%	10%
Oct-December (previous year)	16%	24%	17%	19%	13%	16%
January	14%	11%	13%	10%	15%	12%
February	8%	10%	13%	11%	15%	15%
March	13%	12%	14%	11%	10%	10%
April	11%	7%	10%	9%	13%	7%
May	11%	8%	5%	9%	9%	9%
June	7%	4%	8%	7%	6%	9%
July	3%	4%	4%	6%	3%	4%
August	6%	5%	4%	6%	4%	5%
September	3%	5%	2%	4%	2%	3%
October	1%	0%	0%	0%	0%	1%
November	1%	0%	2%	0%	1%	0%
December	0%	0%	0%	0%	0%	0%

^{**} In all cases, tables with two stars indicates that data excludes direct holidaymakers to Northern Ireland.

When did holidaymakers make a reservation?**

Month reserved part of trip	2006	2007	2008	2009	2010	2011
Pre-September (previous year)	2%	3%	3%	0%	3%	3%
Oct-December (previous year)	13%	19%	14%	14%	10%	13%
January	15%	11%	13%	8%	12%	13%
February	10%	11%	14%	15%	18%	13%
March	13%	15%	16%	13%	10%	13%
April	12%	11%	10%	11%	14%	10%
May	11%	9%	8%	10%	12%	10%
June	8%	5%	7%	8%	8%	10%
July	5%	5%	5%	9%	5%	4%
August	6%	6%	5%	6%	5%	5%
September*	4%	4%	3%	6%	2%	4%
October*	1%	0%	0%	0%	0%	1%
November*	1%	0%	2%	0%	1%	0%
December*	0%	0%	0%	0%	0%	0%

^{*} some misattribution into previous year (Pre September and Oct-December)

How do holidaymakers travel to the island of Ireland?

Air vs. Sea	2006	2007	2008	2009	2010	2011	2012
Air	85%	81%	82%	82%	76%	89%	84%
Sea	15%	19%	18%	18%	24%	11%	16%

What is the length of stay for holidaymakers on the island of Ireland?

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Length of stay	2006	2007	2008	2009	2010	2011	2012
1-5 nights	30%	24%	28%	34%	30%	31%	32%
6-8 nights	29%	31%	30%	29%	25%	26%	34%
9-14 nights	30%	31%	25%	26%	30%	33%	27%
15+ nights	11%	14%	17%	11%	15%	10%	7%
Average number of nights	9.1	10.8	10.0	10.1	10.2	8.7	8.3







Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2006	2007	2008	2009	2010	2011	2012
Hotels	22%	23%	14%	21%	18%	25%	34%
Guesthouses & B&B's	37%	21%	27%	28%	16%	26%	25%
Rented	15%	16%	12%	10%	19%	9%	10%
Caravan/Camping	11%	14%	12%	11%	13%	9%	4%
Friends & Relatives	6%	4%	12%	7%	9%	6%	4%
Other	10%	23%	22%	23%	24%	24%	24%

Where do holidaymakers visit on the island of Ireland?

Regions visited	2006	2007	2008	2009	2010	2011	2012
Dublin	63%	58%	61%	67%	60%	76%	78%
Midlands East	13%	15%	11%	17%	16%	13%	14%
South Eastern	19%	20%	19%	22%	23%	24%	19%
South West	46%	54%	54%	51%	52%	44%	46%
Midwest	30%	26%	26%	28%	25%	23%	20%
Western	40%	38%	33%	33%	31%	37%	40%
Northwest	14%	12%	10%	9%	9%	16%	10%
Northern Ireland	8%	11%	7%	9%	9%	10%	8%

How many holidaymakers use a car?

Car Usage	2006	2007	2008	2009	2010	2011	2012
Car Not Used	47%	46%	47%	48%	46%	59%	56%
Car Hire	38%	37%	38%	36%	32%	29%	33%
Car Brought	15%	17%	15%	16%	23%	12%	11%

How do holidaymakers make their travel arrangements?

Travel Arrangement	2006	2007	2008	2009	2010	2011	2012
Package	23%	30%	23%	17%	12%	19%	24%
Independent	77%	70%	77%	83%	88%	81%	76%

Use of internet to book part of trip**

	2006	2007	2008	2009	2010	2011	2012
Yes	63%	60%	74%	79%	79%	74%	72%
No	37%	40%	26%	21%	21%	26%	28%

Items booked online**

	2006	2007	2008	2009	2010	2011	2012
Air-Sea tickets	60%	54%	70%	74%	76%	67%	70%
Accommodation	27%	32%	46%	55%	56%	54%	51%
Car hire	16%	19%	26%	25%	27%	17%	23%
Other	2%	2%	2%	1%	1%	3%	0%







Sites visited if using the internet**

	2006	2007	2008	2009	2010	2011
Travel Agent's website	5%	7%	4%	6%	4%	5%
Specific accommodation provider's website	13%	13%	14%	13%	15%	9%
Specific Air/Sea Carrier's website	45%	34%	46%	62%	62%	52%
General holiday search portal	10%	14%	22%	10%	12%	19%
Tourist Board's website	16%	17%	9%	12%	15%	16%
Other site with general info on Irish holidays	11%	7%	8%	7%	7%	8%
User Generated Sites e.g. Blogs / Trip Advisor	n/a	2%	1%	2%	0%	2%
Car Hire Website	n/a	4%	9%	6%	9%	8%
Social Networking Sites e.g. Facebook	n/a	n/a	n/a	n/a	n/a	0%
Other	5%	3%	3%	0%	1%	2%

Have holidaymakers been to the island of Ireland before?

Familiarity	2006	2007	2008	2009	2010	2011	2012
First visit	62%	62%	61%	66%	64%	67%	75%
Repeat visit	38%	38%	38%	34%	35%	33%	25%
Born on the island of Ireland	0%	1%	1%	0%	2%	1%	0%

What is the social class profile of holidaymakers?

Social Class	2006	2007	2008	2009	2010	2011	2012
AB	26%	23%	22%	19%	20%	28%	27%
C1	66%	62%	61%	65%	67%	59%	58%
C2	6%	11%	14%	14%	11%	7%	10%
DEF	2%	5%	4%	2%	2%	5%	4%

What age are holidaymakers?

Age	2006	2007	2008	2009	2010	2011	2012
Under 16	3%	4%	6%	6%	6%	7%	5%
16-24	15%	9%	15%	17%	22%	21%	17%
25-34	16%	16%	21%	21%	20%	28%	24%
35-44	13%	16%	18%	18%	15%	13%	16%
45-54	13%	13%	21%	19%	20%	14%	22%
55+	40%	41%	19%	19%	17%	17%	16%

Who do holidaymakers travel with?

Party Composition	2006	2007	2008	2009	2010	2011	2012
Alone	19%	21%	18%	17%	16%	22%	26%
Couple	40%	35%	44%	45%	41%	41%	39%
With family	16%	19%	16%	14%	18%	12%	12%
Other Adult Party	25%	25%	21%	24%	25%	25%	23%







What sites of historical interest do our holidaymakers visit?**

	2006	2007	2008	2009	2010	2011	2012
Any Of The Below	82%	82%	84%	85%	89%	87%	93%
Ancient Celtic sites	N/A	N/A	N/A	N/A	N/A	N/A	27%
Churches/Cathedrals	N/A	N/A	N/A	N/A	N/A	N/A	61%
Historic Houses/Castles	70%	70%	70%	78%	81%	81%	76%
Monuments	62%	61%	64%	66%	72%	69%	42%
Heritage/Interpretative Centres	47%	48%	53%	52%	57%	60%	59%
Museums/Art Galleries	44%	50%	52%	51%	57%	57%	50%
Other Sites Of Cultural Historical Interest	4%	12%	8%	5%	7%	24%	12%
None Of These	18%	18%	16%	15%	11%	13%	7%

What pastimes/events do our visitors engage in?**

	2006	2007	2008	2009	2010	2011	2012
Visited Gardens	27%	28%	37%	43%	45%	46%	33%
Visited National Parks/Forests	n/a	n/a	n/a	43%	56%	56%	39%
Attended An Organised Sporting Event	2%	2%	3%	0%	2%	2%	4%
Tracing Roots/Geneology	0%	1%	1%	0%	2%	0%	2%
Attended Cultural Event/Festival	4%	9%	7%	3%	13%	9%	6%
Used Spa Facilities	1%	3%	1%	1%	2%	2%	2%
None Of These	n/a	n/a	59%	45%	33%	34%	48%

What activities do our holidaymakers engage in?**

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	2006	2007	2008	2009	2010	2011	2012
Fishing	3%	4%	5%	7%	5%	5%	4%
Equestrian Pursuits	1%	1%	1%	1%	3%	3%	2%
Cycling	3%	4%	6%	4%	7%	5%	3%
Golf	3%	5%	4%	4%	5%	1%	3%
Hiking/Cross-Country Walking	17%	26%	18%	29%	28%	21%	22%
Other Water Based Activities	4%	6%	5%	3%	5%	3%	1%

How much travelling do our holidaymakers do in Ireland?**

Regionality Segments	2006	2007	2008	2009	2010	2011	2012
Dublin Only	22%	19%	24%	28%	25%	30%	24%
Tourer	43%	44%	38%	41%	36%	42%	41%
Static Regional	16%	27%	22%	19%	23%	12%	12%
Two Bases	19%	10%	16%	11%	16%	14%	23%







Where do our holidaymakers come from?**

	2006	2007	2008	2009	2010	2011	2012
Schleswig Holstein	1%	3%	3%	6%	4%	6%	1%
Bremen	2%	4%	2%	2%	3%	3%	4%
Hamburg	9%	5%	6%	6%	7%	11%	4%
Niedersachsen	4%	3%	6%	6%	6%	4%	4%
Nordrhein Westphalen	21%	17%	16%	13%	13%	10%	18%
Hessen	16%	13%	10%	10%	11%	14%	13%
Rheinland Pfalz	7%	5%	5%	6%	11%	3%	8%
Baden Wurttenburg	18%	18%	12%	18%	14%	12%	14%
Bayern	16%	19%	18%	17%	16%	23%	18%
Berlin	1%	4%	10%	5%	5%	7%	9%
Mecklenberg Vorpommern	0%	0%	1%	2%	1%	1%	0%
Sachsen Anhalt	1%	3%	1%	2%	2%	1%	0%
Thuringen	1%	2%	2%	1%	1%	1%	1%
Sachsen	2%	2%	3%	3%	4%	2%	4%
Brandenburg	0%	1%	3%	0%	1%	1%	0%

Sources: Failte Ireland's Survey of Travellers (SOT) and NITB / NISRA's Northern Ireland Passenger Survey (NIPS)

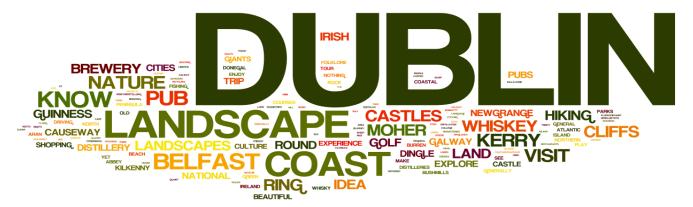




What do Holidaymakers think of Ireland?

What are the top things Germans hope to see, do or experience in Ireland?

source: Tourism Ireland's Global Brand Tracker 2012 - 1000 Germans surveyed at home



Did the desire for these experiences influence German holidaymakers' decision to visit?*

source: Failte Ireland's Visitor Attitude Survey 2012

* NB: Northern Ireland attractions such as the Giant's Causeway not included in this question

% Holidaymakers who said yes	Germany
	%
An Irish pub	90%
Dublin's heritage and culture	74%
An Irish castle	71%
The Cliffs of Moher	54%
Connemara	48%
The Ring of Kerry	45%
The Rock of Cashel	26%

The Irish pub is an iconic pull for German holidaymakers, who enjoy the traditional music sessions - and the chance to try Guinness. Landscape and the coast are big draws for them too, as is Dublin's heritage and culture.

Did you experience any of the following on your holiday in Ireland?*

source: Failte Ireland's Visitor Attitude Survey 2012

^{*} NB: Northern Ireland attractions such as the Giant's Causeway not included in this question

% Holidaymakers who said yes	Germany
	%
Have you listened to live music in a pub?	88%
Have you tasted Guinness?	88%
Have you visited coastal towns?	86%
Have you visited food or craft markets?	64%
Have you took part in a city tour?	41%
Have you followed a literary trail?	17%













After their first holiday in Ireland, what do German holidaymakers say makes Ireland unique? source: Tourism Ireland's PromEx study 2007



What have first-time holidaymakers from Germany said about their holiday in Ireland?

source: Tourism Ireland's PromEx study 2007

You get to know people very quickly, I have never experienced this in any other country.

The green landscape, the clean sea, the easy way of enjoying the day .

Unspoilt nature, various landscapes, small density of population, Ireland has its own character. Tourists are welcomed , but Irish people remain themselves. In Ireland you can find yourself'.

Most memorable? To drink a real Guinness with real Irish

The island and the people are still very genuine and natural.

Landscapes were fantastic.

Friendly, mythical, a good atmosphere for kids.

