Visitor Market
The island of Ireland welcomed **667K visitors** from Germany in 2017. German visitors account for **6%** of all visitors to the island.

**Where do they come from?**
- 20% North Rhein-Westphalia
- 16% Berlin
- 10% Baden-Württemberg
- 15% Bavaria

**Visitor Growth in 2017**
**+3%**

**Island of Ireland**

**107M Outbound visits**
Germany is the world’s 2nd largest outbound market. Germans made over 107m trips in 2017 with 88% (94m) of those visits within Europe.

**Latest performance**
Read more to access the latest performance on visitors, holidaymakers and revenue from Germany.
Revenue and Bednights
German visitors spent a total of €417M/£363M on the island of Ireland in 2017. This is an additional +€12M/£11M over 2016. This represents a spend of €625/£544 per German visitor.

6M
Bednights
4 in every 5 nights are spent in paid accommodation, with rented accommodation, guesthouses/B&B hotels and hostels particularly popular among the more value for money conscious German visitor.

Average nights on the island
9.1
9+ nights 26%
6 to 8 nights 23%
Up to 3 nights 28%

Spend per visitor
€625/£544

Air Links
Air routes to the island have increased by +18% in summer 2018 when compared to summer 2017.

33K
Seats per week to Ireland
12 cities in Germany 5 Airlines

378
Seats per week to Northern Ireland
1 city in Germany 1 Airline

33K
Weekly summer seats in 2018
+5K
Additional seats over 2017

Industry opportunities
Tourism Ireland works with airlines and sea carriers to create co-operative marketing opportunities for our industry partners to get involved with.

GET INVOLVED
Holiday Market
In 2017, 68% of all visitors from Germany were holidaymakers. Germany accounts for 9% of all holidaymakers to the island of Ireland.

8.2
Average Holiday nights to the island of Ireland
8 nights average Ireland
3 nights average Northern Ireland

€299M/£260M
Holidaymaker revenue

+1% +7%
Ireland Northern Ireland

Reasons for visiting

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>67%</td>
</tr>
<tr>
<td>Business</td>
<td>13%</td>
</tr>
<tr>
<td>Visiting friends &amp; relatives</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
</tbody>
</table>

Interest in Visiting
The island of Ireland is the 5th most popular destination German holidaymakers are interested in visiting in the next 3 years.

35%
of German holidaymakers intend to holiday to the island in the next 3 years

We motivate visitors by keeping the island top of mind with inspiring communication showing the island as a unique destination, with a lot of things to see and do, that it is easy to reach and where visitors can experience living culture in a breathtaking landscape.

13%
of German holidaymakers are actively planning a holiday to the island in the next 12 months

The island of Ireland competes with France, Italy, Spain, Austria, the Netherlands and Greece.

Driving Holiday Growth
Tourism Ireland has created a tailor-made marketing programme targeting German holidaymakers to stimulate interest and holiday booking from our 3rd largest holiday market.

71%
Interested in a holiday to the island

Increase of +145K holidaymakers since 2013

447K
holidaymakers in 2017
Our Best Prospects
The island attracts holidaymakers from Germany with varying motivations, three core segments accounted for 80% of all German holidaymakers to the island in 2017.

- **7.8M Culturally Curious in Germany**
  Culturally Curious holidaymakers are interested in meeting the locals, getting off the beaten track and broadening their minds and feeling connected to nature.

- **2.6M Social Energisers in Germany**
  Social Energisers enjoy socialising, adrenaline-filled adventures, experiencing places/activities with a wow factor and meeting other tourists. They are very active in social media and regularly share with their network.

- **6.9M Great Escapers in Germany**
  Great Escapers like to revisit places of nostalgic importance, enjoy peace and quiet and like to feel connected to nature.

**Regions and Seasons**
More than half (53%) of German holidaymakers use a car during their trip, the highest level among overseas holidaymakers. Most of these hire a car on arrival.

- **38% holiday during July-Sept**
- **8% visit Northern Ireland**
- **74% book 3-4 months in advance**

Tourism Ireland runs targeted email marketing campaigns timed to coincide with critical holiday decision-making times.
Engaged Holidaymakers
German holidaymakers are our most active visitors, exploring our historical sites and engaging in multiple events/activities while on the island. Hiking and cross-country walking is more popular with German holidaymakers than any other market.

Holidaymaker Profile
55% of all German holidaymakers to the island of Ireland are under 35 years old and 30% of holidaymakers have been here before.

- 92% visit sites of historical interest
- 74% engage in pastimes / events
- 62% participate in activities

<table>
<thead>
<tr>
<th>Age Profile</th>
<th>14% 55+</th>
<th>31% 25-34</th>
<th>31% 35-54</th>
<th>24% 0-24</th>
</tr>
</thead>
<tbody>
<tr>
<td>46% holiday as a couple</td>
<td>C2: 6%</td>
<td>DE: 2%</td>
<td>AB: 26%</td>
<td></td>
</tr>
<tr>
<td>ABC1 holidaymakers</td>
<td>Socio economic group</td>
<td>C1: 66%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Past holidaymakers can be a great source of future business. Enrich your website and email marketing campaigns with great content from our archive.
Online & Offline Inspiration
When choosing Ireland as a destination, 52% of German visitors were inspired to visit by word of mouth from family, friends and work colleagues.

Just some of the sources of influence when choosing/planning to visit

<table>
<thead>
<tr>
<th>Source of Influence</th>
<th>Planning</th>
<th>Checking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word of mouth</td>
<td>52%</td>
<td>29%</td>
</tr>
<tr>
<td>Internet</td>
<td>51%</td>
<td>24%</td>
</tr>
<tr>
<td>Guide Books</td>
<td>21%</td>
<td>6%</td>
</tr>
<tr>
<td>Social Media</td>
<td>24%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Partnering for Success
Get in contact with our team in Germany who can partner with you to help.

Planned via Social Media
Over half (52%) of all German holidaymakers who used Social Media to plan their visit to the island of Ireland, did so using a carrier website and over one quarter (27%) used a tourist board website.

Planned via the Internet
Facebook was the most popular (88%) social media outlet for holidaymakers when planning to visit the island of Ireland, followed by Instagram (56%) and Youtube (39%).

Contact us
Get in contact with our German team who can partner with you to help deliver more visitors and revenue from Germany to your business, and the island of Ireland.

Market Insights
Learn about opportunities in other markets and keep up-to-date on latest visitor numbers and market intelligence.

Marketing Opportunities
Select the marketing opportunity that’s right for you to help attract additional visitors and grow your business from Germany and other markets.

www.tourismireland.com