

SPOTLIGHT ON OUR GERMAN VISITORS TO SCOTLAND

SOURCE: SCOTLAND VISITOR SURVEY

Spotlight on the German visitor to Scotland (1)

57% repeat visitors
(of which 7% take trips in Scotland regularly)



43% first time visitors

40% over age 55

17% aged 25 to 34

8% under 24

76% toured Scotland staying in 2 or more places



15% stayed in one urban, city or town location

75% were in employment
14% were retired

13% were on a trip of a lifetime



66% were on holiday as a couple

8% were travelling solo

6% travelled with child/children

6% travelled with pets or animals



Spotlight on the German visitor to Scotland (2)

Top motivations for visiting Scotland

Scotland's scenery is a very strong driver for North European markets.

Scotland's people and outdoor activities also stand out as stronger drivers for our German visitors than other European markets.

86%
Scenery & landscape

68%
History & culture

51%
Scotland's people

41%
Outdoor activities



43%
took part in a food and drink experience

Key attractions visited:

- castle or fort
- historic house or palace
- cathedral or church
- nature reserve
- country park or garden

Top activities undertaken

57%
viewed architecture and buildings

54%
hill walk, hike

45%
shopping

22%
watching wildlife

21%
a short guided tour



Source: Scotland Visitor Survey 2023

The visitor journey: German visitors to Scotland

Inspiration



Planning



Booking



Getting to Scotland



Trips in Scotland



Post trip



Sources of inspiration

55% personal recommendations

46% digital information

37% film, TV or books featuring Scotland

(net figures)

Started planning **29.2 weeks** in advance prior to arrival

Sources used to plan

49% VisitScotland's website

34% accommodation providers

33% transport providers

55% travel intermediaries (net)

Started booking **16.8 weeks** in advance

Accommodation:

39% booked directly with providers

70% booked via travel intermediaries

Transport to Scotland:

74% booked directly with providers

26% via travel intermediaries

Activities:

34% booked in advance

Transport used to travel to Scotland from Germany

60% by plane:
49% direct
12% indirect

26% boat, ship or ferry

25% by car:
22% own car
3% hire car

Accommodation used

61% hotel, motel or inn

31% B&B/GH

15% rented house, cottage, lodge

Net serviced accom:

70%

Net non serviced accom

51%

71% rated their trip 9 or 10 out of 10

86% are likely to recommend Scotland (9 or 10 out of 10)

68% are quite or very likely to return in the next 5 years

1. German visitor profile

The majority of German visitors were spread across the 25 to 64 age range. Those German visitors aged 55 to 64 (29%), were more prevalent compared to other European countries.

More than three quarters of German visitors were in work, similar to visitors from other European markets.

66% were on holiday as a couple, while **8%** were travelling solo.

6% were travelling with a pet.

4% of German respondents reported they had a long-term health condition, disability or infirmity.

Summary



2. German visitor and trip profile

43% were first time visitors to Scotland.

59% of German Visitors reported that their trip to Scotland was a regular holiday, while a fifth were celebrating a special occasion.

13% described their holiday as a trip of a lifetime, similar to the European average.

Over three quarters of German visitors reported touring around Scotland, staying in 2 or more locations. Those who stayed in only one place tended to choose either an urban location (15%) or a countryside or rural place (6%).

15% of German visitors stayed in one urban location, a lower proportion compared with visitors from Spain/Italy (25%).

Summary



3. Holiday motivations and reasons for choosing Scotland

Scotland's scenery, history and culture, outdoor activities, attractions and food and drink were the key motivations for visits. Scotland's people were also one of the main reasons why German visitors decided to come to Scotland.

Personal recommendations (55%) was the most influential source of inspiration, followed by digital resources (46%).

Just less than one in five visitors mentioned VisitScotland online content. Film, TV or literature was also an important source of inspiration (37% net figure).

Summary



4. Holiday planning and booking

Visitors from Germany started planning their trips to Scotland **29.2 weeks in advance** and booked their trips **16.8 weeks** prior to arrival, a longer lead time than other European markets.

Nearly half of visitors mentioned the use of VisitScotland's website for trip planning (49%). 55% used a type of travel intermediary for holiday planning.

Travel intermediaries play a significant role in accommodation booking with 70% citing their use, more so amongst first time visitors to Scotland. Nearly 3 out of 5 German visitors booked their travel to Scotland directly with the transport provider.

34% German visitors booked activities/experiences prior to arrival, lower than the European average (44%).

Summary



5. Transport and accommodation

60% of German visitors travelled to Scotland by plane, most often on a direct flight.

30% travelled to Scotland by public transport (ferry, coach, train).

25% travelling to Scotland by car.

68% used public transport when touring around Scotland (public bus, ferry, train, or tram within areas visited). Travelling by car was also popular (66%).

61% of German visitors stayed in a hotel during their trip, while nearly a third stayed in a guest house or B & B, followed by self-catering accommodation.

Summary



6. Activities, events, attractions, food and drink

100% of German visitors to Scotland visited at least one type of attraction.

86% of German visitors participated in at least one type of activity.

43% of German visitors took part in at least one food and drink experience.

30% of German visitors participated in at least one type of event.

Summary



7. Holiday satisfaction and likelihood to return

44% of German visitors rated their holiday in Scotland as a perfect 10 out of 10 experience.

86% of German visitors are likely to recommend Scotland (9 or 10 out of 10).

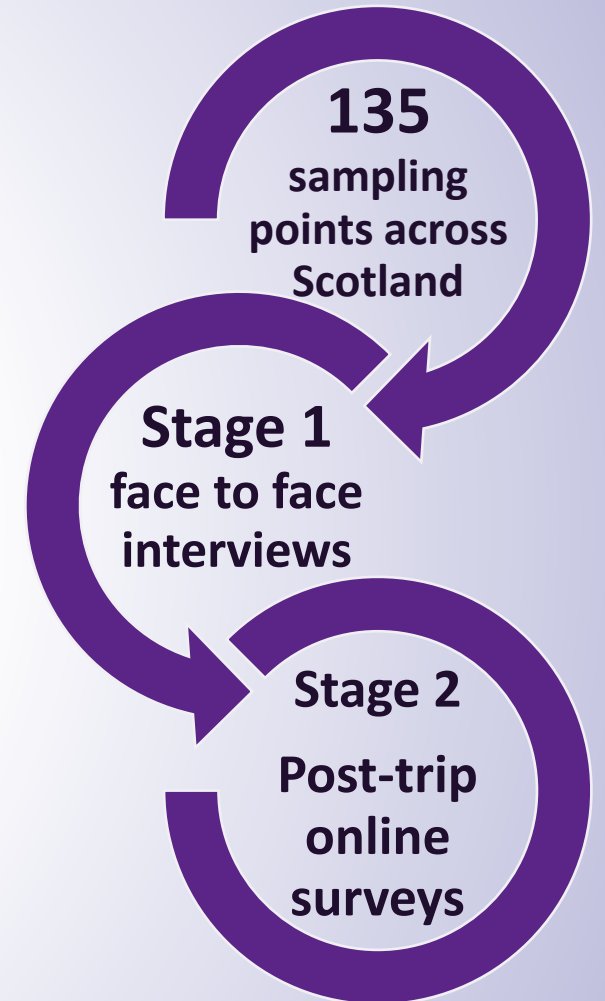
68% of German visitors said they are quite likely or very likely to return to Scotland in the next five years, more so amongst repeat visitors (73%).

Summary



Scotland Visitor Survey: Background

- VisitScotland has undertaken Scotland-wide visitor surveys over a number of years. Recent surveys have taken place in 2011/2012 and 2015/2016. The scheduled survey in 2020 was postponed due to the Covid-19 pandemic.
- The visitor survey explores different aspects of the visitor experience in Scotland and content is updated each time to reflect changes in the consumer and market environment. The visitor survey is therefore not a tracking survey.
- The survey was commissioned by VisitScotland and undertaken by independent market research agency, Progressive Partnership Limited.
- The survey involved short face to face interviews with visitors across Scotland between March and October 2023. A more detailed online survey was emailed to visitors on their return home and ran from April to November 2023.
- Sample sizes for visitors from Germany (leisure overnight visitors only):
First stage face to face survey sample for visitors from Germany: n=662
Second stage follow-up online survey sample for. Germany: n=152
- Please note the data for individual European countries is unweighted.



Definitions used

Within this report where we explore aspects of planning and booking, we refer to the use of “travel intermediaries”.

Travel intermediaries refer to a range of types of organisations that resell tourism products onto end consumers. They may sell individual products (such as hotels, travel or activities) or they may sell packaged products which include all or some of these elements.

Broadly travel intermediaries include travel agents, tour operators, online marketplaces and price comparison websites.

Definitions used (cont)

All types of travel intermediaries

Travel agents who offer advice through personal interaction, such as high street shop or telephone (e.g., TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT)

CODE

3

Personal travel agent or advisor (someone who creates bespoke tailor made holidays specifically for you)

4

Online only travel agents who offer a wide range of travel deals online, such as flights, accommodation, car hire, etc. (e.g., [TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT])

5

Online tour operators (e.g., [TEXT SUBSTITUTION FOR EXAMPLES – SEE RIGHT])

6

Online marketplace – a website or app that connects the traveller with accommodation and experience providers directly (e.g., Airbnb, VRBO)

7

Price comparison websites – a website or app that aggregates travel deals, such as flights and accommodation, from other sites (e.g. Skyscanner, Kayak.com, Priceline.com, lowestfare.com)

8

Peer review websites – a website or app that collates reviews from other travellers (e.g. TripAdvisor)

9

Specialist travel agents or tour operators who focus on specialist interest travel and tours, e.g., golf, walking, cycling, cruises

10

Market specific examples in the questionnaire:

Code 3 – Travel agents

- UK – TUI, First Choice, Hays Travel, Trailfinders
- US – CIE Tours, Globus, Cosmos, Collette
- Canada – Kensington Tours, Globus, Cosmos, RIT Vacations
- Germany – DER Tours, Wolters Rundreisen, TUI
- France – TUI, Havas, Comptoir des Voyages
- Netherlands – ANWB, TUI, Oad
- Spain - Tourist Forum, Viajes El Corte Ingles, B Travel
- Italy – Boscolo, Cocktail Viaggi, Caldana International
- Australia – Flight Centre, Helloworld
- All others - TUI

Code 5 - Online Travel agents

- Germany – Booking.com, Expedia, HRS
- France – Booking.com, Expedia, Voyage Privé
- Spain - Logitravel, eDreams, Booking.com
- Italy – Expedia, eDreams, Booking.com
- All others - Booking.com, Expedia

Code 6 – Online tour operators

- UK – TUI, First Choice, Hays Travel, Trailfinders
- US – CIE Tours, Globus, Cosmos, Collette
- Canada – Kensington Tours, Globus, Cosmos, RIT Vacations
- Germany – DER Tours, Wolters Rundreisen, TUI
- France – TUI, Havas, Comptoir des Voyages
- Netherlands – ANWB, TUI, Oad
- Spain - Tourist Forum, Viajes El Corte Ingles, B Travel
- Italy – Boscolo, Cocktail Viaggi, Caldana International
- Australia – Flight Centre, Helloworld
- All others - TUI

Accommodation definitions

Serviced accommodation:

Hotel/Motel/Inn

Restaurant with rooms

Guest House/B&B

Serviced Apartment

Non serviced accommodation:

Self catering accommodation (whole of property or unit)

Friend's or relatives homes

Rental of private home (room only)

Second home or time share

Caravan, camping and glamping

Private home:

Staying with friends/relatives

Rental of a room in someone's private home

Second home

Caravan, camping and glamping:

Campervan or motorhome

Camping (campsite or wild)

Touring or Static Caravan

Glamping or alternative accommodation

All 'other' accommodation types are not included in the above nets i.e. hostel, farmhouse, other.



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