



Visit**Aberdeenshire**

BEING GERMAN READY BUSINESS OPPORTUNITIES GUIDE



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GERMANY IS SCOTLAND'S LARGEST EUROPEAN OUTBOUND TRAVEL MARKET AND THE SECOND MOST IMPORTANT SOURCE OF VISITORS



30.6 MILLION GERMANS TRAVELLED ON AT LEAST ONE HOLIDAY OR SHORT BREAK IN 2015¹

Introduction

Germans love to travel. For them, travelling is a necessity: a reward for their hard work and an escape from the stresses of life.

With a real GDP of two trillion Euros and 82 million inhabitants, Germany is not only one of the wealthiest but also Europe's most populous country. If you add Austria and Switzerland, the German-speaking region counts almost 100 million inhabitants.

Germany is the biggest international source market for Scotland from Europe, and the second largest globally. Germans are particularly valuable to Scotland: they stay an average of 7.4 nights in Scotland and tour around the country. They also tend to visit more than once with a number returning to Scotland for second and more visits.

While interest levels in Scotland are high and visiting the country holds strong appeal, many Germans struggle to see what is unique about Scotland. Key motivators for German travellers to Scotland are the stunning scenery, culture and heritage, yet many of these are the same appeal that other destinations offer to German visitors, e.g. Ireland. It is therefore important that Scotland shows them iconic, stand-out things to see and do when they get here.

Previously Scotland may have been considered as more expensive. However, with the strength of the Euro, reductions in Aberdeen hotel prices and more favourable exchange rates (compared with competing destinations such as the Nordics), there is an opportunity for Aberdeen & Aberdeenshire businesses to capture more of the lucrative German market.



Why Aberdeen & Aberdeenshire is targeting the German market



Germany is the world's largest outbound travel market, with a **population of 82 million**



It is Scotland's third largest market, with **14 direct flights** a week to Aberdeen from Frankfurt



77.1% of the German-speaking population (14+) take at least one holiday of a minimum of five days



German holidaymakers have the **highest average length of stay** above all other main markets



82% of Germans use the internet, but they like information in German when planning a holiday



TOP 5 OUTBOUND SHORT BREAK DESTINATIONS FOR GERMANS

1. Austria 2. Netherlands
3. France 4. Great Britain 5. Italy

DID YOU KNOW?

VisitBritain commissioned research in the German Reiseanalyse 2016 survey². Key findings were:

29%

In which of these countries would you like to spend a holiday in the next five years?

The top two answers at 29% each were Sweden and Scotland.

57%

In which of these regions of Great Britain would you like to spend a holiday in the next five years?

57% answered: Scotland.

SOURCE: IPS, 2015; VISITSCOTLAND, 2015

GERMAN TRAVEL MARKET: FACTS

- Europe's share of German outbound travel is **89%**
- Great Britain's share of German **outbound travel is 0.4%**
- Scotland's share of the German outbound travel market is small, so there is **significant potential** to grow market share
- Most German workers receive between **28 and 30 days annual leave**
- Germans have the **second highest expenditure** on travel worldwide (VisitBritain 2013)
- Decision-making is done early in the year with January, February and March the **key booking time** for holidays
- Travel and tourism products constitute around **50% of all online purchases** in Germany
- There are **30 million walkers in Germany** (10 million walk regularly and 20 million walk occasionally)
- **18%** of Germans cycle (including 3% mountain biking)
- **25%** of Germans take a short break abroad
 - **7 million** to cities
 - **11.8 million** to non-city destinations



What we know about the German market to Scotland and Aberdeen & Aberdeenshire

Germany is an important market to Scotland and it is essential for Aberdeen & Aberdeenshire businesses to know this market better.

Building your business is dependent on many factors. Understand them to capitalise on the market - who the visitors are, what motivates them and what you then need to do to give them an experience that generates positive word-of-mouth and repeat visits.

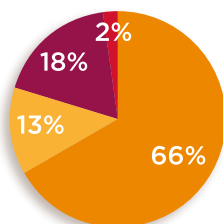
SCOTLAND FACTS AND FIGURES

One fifth of our German holidaymakers are from the highest AB social class. They are typically affluent and well-educated, with interests in culture, outdoor activities and the environment.

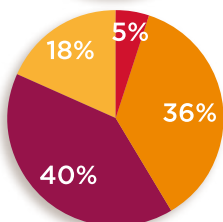
TOP TOWNS VISITED:
Edinburgh, Glasgow, Inverness

TOP REGIONS VISITED:
Lothians, Highlands & Islands, Greater Glasgow & Clyde Valley

REASON FOR VISIT	
Holiday	66%
Business	13%
VFR	18%
Other	2%



SEASONALITY	
Jan-Mar	5%
Apr-Jun	36%
Jul-Sep	40%
Oct-Dec	18%



BY PURPOSE OF VISIT				
Total	Holiday	Business	VFR	Other
Average stay (nights)	7.6	5.3	7.8	11.6
Average spend/night	£84	£78	£33	£77
Average spend/trip	£634	£413	£257	£889

SOURCE: IPS, 2015; VISITSCOTLAND, 2015



Germany is the third largest source of visitors to Scotland after England and the US



Each year over 323,000 Germans visit Scotland, over 50% are holidaymakers



Germans spend the largest proportion of their budget on bed and board



German holidaymakers tend to stay longer and spend more in multiple locations around Scotland



German visitors to Scotland will spend their entire holiday time here, rather than it being part of a longer holiday

OVERVIEW OF GERMAN VISITORS TO SCOTLAND: 2015 STATISTICS

TOTAL EXPENDITURE
£175 million

TOTAL NIGHTS SPENT
2.39 million

AVERAGE LENGTH OF STAY
7.4 nights

AVERAGE SPEND
£542 per visit

ABERDEEN & ABERDEENSHIRE FACTS AND FIGURES

NUMBER OF TRIPS
60,000

TOTAL NIGHTS
401,000

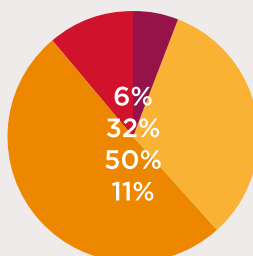
TOTAL SPEND
£28m

AVERAGE STAY
6.7 nights

AVERAGE SPEND/TRIP
£468

Three-year average 2013-2015
SOURCE: SOURCE: IPS, 2015

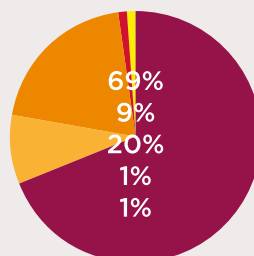
MONTH OF VISIT



Jan-Mar	6%
Apr-Jun	32%
Jul-Sep	50%
Oct-Dec	11%

Average over a five-year period 2011-2015

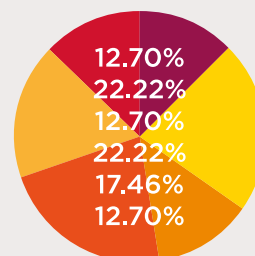
PURPOSE OF VISIT



Holiday	69%
VFR	9%
Business	20%
Study	1%
Other	1%

Average over a five-year period 2011-2015

AGE RANGE OF VISITORS



16-24	12.70%
25-34	22.22%
35-44	12.70%
45-54	22.22%
55-64	17.46%
65+	12.70%

HOW LONG DO GERMAN HOLIDAYMAKERS STAY IN ABERDEEN & ABERDEENSHIRE?

**49% stay for more
than nine nights**

**41% for four to
seven nights**

**6% stay for more
than 15 nights**

**5% for fewer than
three nights**

Note: Statistics are drawn from a number of sources including IPS, VisitScotland, VisitBritain, Reiseanalyse 2016. Keep up-to-date with the latest tourism statistics on www.visitscotland.org. Analysis of sub-groups, such as trips by purpose or demographic group, relies on small sample sizes that can be unreliable. Where this is a particular issue, methods to aggregate data, such as using a three-year average instead of single-year data, have been used. Before using the data, it is important to recognise the limitations of using a small sample size.

What do Germans think of Aberdeen & Aberdeenshire?

NATURE **GREEN** **HISTORIC**
peaceful *Scottish* *interesting* *cold*
SEA **CULTURE** **BEAUTIFUL** *whisky* **OLD**
SCOTLAND **CITY** *romantic*

VisitAberdeenshire commissioned an online research study to gather views from Germans on Aberdeen & Aberdeenshire as a tourist destination.

Participants had to have been on holiday at least once in the last year and aware of Aberdeen & Aberdeenshire. The study explored individual perceptions of Aberdeen & Aberdeenshire and also tested the narrative of Aberdeen & Aberdeenshire's shared story.

The key findings were:

61% 61% would consider visiting Aberdeen & Aberdeenshire for a holiday/short break (within the next three years)

92% 92% would consider visiting Scotland and 93% Aberdeen & Aberdeenshire in the next three years

+ Most likely to use positive words to describe Aberdeen, listing top three as 'beautiful', 'nature' and 'green'

+ Generally most likely to associate Aberdeen & Aberdeenshire with words and narrative from the story toolkit. Coastline, Whisky, Culture and Nature & Wildlife were the words most associated with Aberdeen & Aberdeenshire

What do they do when they're here?

German visitors will participate in a wide range of activities during their trip. They enjoy sightseeing by car, coach and on foot, trying local food and going for both short and long walks. Built heritage, especially castles, are also a big draw for many German visitors.

75% The primary reason for holidaying in Scotland for almost 75% of German holidaymakers is to explore

73% 73% tour the country by car, stopping and sightseeing when they want

52% 52% are on a short-break visit to a particular city

38% 38% are on holiday mixing city and countryside

71% 71% visited a historic venue

63% 63% go hiking or walking

70% 70% eat out in pubs and restaurants

+ German holidaymakers like hotels, guesthouses, B&Bs and rented accommodation in broadly equal measure

+ Meeting and engaging with the locals is also an important experience for German visitors. **71% of German visitors interviewed felt 'interaction with local people' really added to my experience** and **91% felt 'I was made to feel welcome on my holiday by the locals'**.

Access to Scotland and Aberdeen & Aberdeenshire

WHY IS ACCESS SO IMPORTANT?

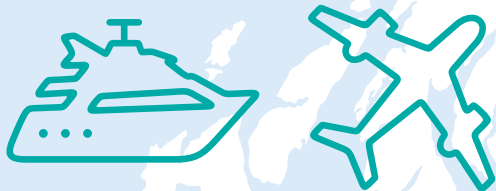
In a country with 10 land borders, it is easy for Germans to travel abroad by road or rail.

The vast majority of visits to Great Britain involve air travel, although travelling by sea and via the Channel Tunnel is not unusual. Heathrow is the biggest gateway to the country; however there are many direct access routes to Scotland from Germany.

The majority of German visitors travel to Scotland by plane, with Edinburgh Airport the most favoured by far. Although touring is very popular with over half of German visitors, they also often combine town and country for a short break and will use cities as gateways followed by a few days exploring the surrounding countryside.

Travelling by air (55%) is the most popular mode of transport for Germans' main annual trip abroad.

With 14 scheduled weekly Lufthansa flights to Aberdeen International Airport from Frankfurt, there is a great opportunity to target the German market.



FLIGHT ACCESS FROM GERMANY TO SCOTLAND

DEPART	ARRIVE	AIRLINES
Berlin Schönefeld	Edinburgh	RyanAir
Berlin	Glasgow	EasyJet
Berlin		RyanAir
Bremen	Edinburgh	RyanAir
Düsseldorf		RyanAir
Düsseldorf		Eurowings
Düsseldorf	Glasgow	Eurowings
Düsseldorf		Germanwings
Frankfurt-Hahn	Edinburgh	RyanAir
Frankfurt	Aberdeen	Lufthansa
Frankfurt	Edinburgh	Lufthansa
Frankfurt	Glasgow	
Hamburg	Edinburgh	RyanAir
Hamburg		EasyJet
Karlsruhe /Baden-Baden		RyanAir
Munich		Eurowings
Munich		EasyJet
Munich	Glasgow	Lufthansa
Stuttgart		EasyJet

Although there is no direct ferry access from Germany to Scotland, Amsterdam is only two to three hours from Bonn, Düsseldorf, Cologne and many other German cities in North Rhine-Westphalia, Lower Saxony and Bremen.

DFDS Seaways operates a ferry from Amsterdam (Ijmuiden) to Newcastle with up to seven ferry crossings per week. The crossing takes 16 hours 30 minutes.



DID YOU KNOW?

125,000 German visitors access the UK each year via DFDS Ferries to Newcastle. Create promotions with DFDS to attract more of them to Aberdeen & Aberdeenshire.

Germany - the market



Understanding the needs and motivations of the German market is important for your business.

We have pulled together some useful information on the target profile of visitors to Scotland and their motivations for visiting.

Demand for shorter breaks, city breaks, event tourism, activity and adventure holidays, and culturally motivated trips will gain popularity over the next five to ten years.

How do German holidaymakers plan their visit?

Remember, when targeting the German market, Germans are not really last-minute bookers.

- **65% decide on their holiday destination six months before their trip.** Time your promotions and sales to coincide with that. Germans like simple, clear details and they like choice. A menu of options or itinerary examples, rather than very strictly prescribed bundles, will be effective.
- Germany is a big country - some parts are landlocked with fantastic mountains, so **highlight Aberdeen & Aberdeenshire's coastal scenery** when targeting people in those areas.
- In Germany, there are slight differences in the main holiday time in different states, so there may be opportunities to **target shoulder-season business from particular parts of Germany**. Bear this in mind when planning your promotion and consult VisitAberdeenshire and/or the tour operator you're working with.

MARKET SEGMENTS

Customer segments: the visitors Aberdeen & Aberdeenshire aims to attract share a common attitude towards holidays and can be defined as independent explorers. These are people who appreciate honesty, and value authentic experiences and places. They can be described as:

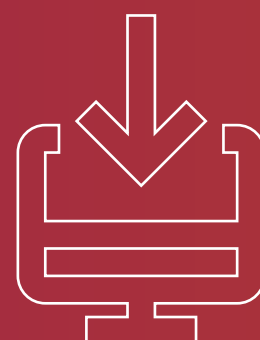
- Scenic **explorers enjoy exploring a destination's beautiful scenery along the coast and countryside**, taking in nature, walking, incorporating heritage attractions and including activities in a holiday. They **want to experience the outdoors**, but also take in a bit of the country's culture, with a visit to a castle and a lunch in a local pub along the way.
- Cultural explorers enjoy the scenic aspect of a destination but want to **combine this with going deeper into a destination's cultural heritage**: visiting castles, historic houses, gardens, museums and interesting towns and cities.
- Active explorers **enjoy physical activity outdoors on their holiday**. They are more likely to include hiking, long walks and other activities during their visit.

Across each segment, holidays by German visitors tend to be touring holidays, exploring the area by car. They generally travel with their own cars or fly and drive. They like to stay in quality, character accommodation, sample locally produced food and 'meet the locals' in a traditional pub.

IDEAS TO TRY

German holidaymakers plan well and search for detailed information when organising their holiday. Although many of them speak very good English, they like detailed information available in German. If you're serious about targeting the German market, you should translate some pages on your website and also consider translating other relevant promotional material. If you or your staff can speak German, even better.

Use Google Translate or a similar online translation facility on your website



How do VisitScotland and VisitAberdeenshire target Germany?

As Scotland's second largest international market, there are plenty of reasons to target Germany: average length of stay, spend and product fit are all strong factors. Holiday visits in the UK typically last from four to seven days. Visiting built heritage, especially castles and famous sites, rates as one of the most popular activities undertaken.



VisitAberdeenshire

VisitScotland marketing in Germany

VisitScotland's international marketing campaign to encourage German visitors to explore Scotland focused on Cultural Seekers. These are visitors over 35, either singles or couples with no or grown-up children, who have an interest in scenery, culture, history and people.

THE CAMPAIGN INCLUDED:

- Online banner advertising and social media activity including Facebook promotions, Plista, AdPepper and T-Online
- Dedicated German website landing pages, PR focus and trade media
- Advertorial in Dumont and digital advertising in Cologne and Düsseldorf

VisitAberdeenshire marketing in Germany

VisitAberdeenshire carries out various activities in Germany: one of its most recent campaigns targeted core audiences in and around Frankfurt.

REASONING

- Ongoing research has identified Germany as a core target audience/market for Scotland and this region.
- Frankfurt was targeted due to the city's direct flights to Aberdeen, offering hassle-free access to Aberdeen & Aberdeenshire.

THE CAMPAIGN

- Print advertising in four major walkways/areas in Frankfurt Airport
- Social media advertising campaign (on Facebook), also targeted directly at this region

RESULTS

Based on the whole campaign, which also targeted Norway, Iceland, England and rest of Scotland, there has been a **12.13% increase of unique visitors** to the VisitAberdeenshire website. There was a **massive 828.68% increase to the website from social referrers** – largely due to the Facebook campaign and a big increase in referrals from other social media channels too.

Facebook adverts reached over 3.5 million people, sparking over 100,000 actions and 91,000 clicks directly to the website. The increase in direct traffic to www.visitabdn.com was due to the extensive airport marketing campaign – there has been a total 30.11% increase in offline direct traffic and a **572.73% offline direct increase in new visitors** from Frankfurt alone.

VisitAberdeenshire is also targeting business tourism and travel trade attending MICE events in Germany, e.g. IMEX Frankfurt.

MAKE IT WORK FOR YOU

- There are lots of opportunities for you to engage with the German market: get in touch with VisitScotland or VisitAberdeenshire to explore them.
- Register your interest in working in partnership with VisitScotland, mentioning how you would like to get involved. Visit this page on www.visitscotland.org
- Keep up-to-date with VisitScotland's marketing initiatives and industry events by subscribing to their monthly industry newsletter – eUpdate
- Develop your own campaigns on the back of VisitScotland's and VisitAberdeenshire's marketing activity
- Go to VisitAberdeenshire's industry dedicated website for direct information about how best to work with the DMO (<http://industry.visitabdn.com/>)
- Sign up to VisitAberdeenshire's industry newsletter for monthly updates on activity and opportunities available to business
- Use VisitAberdeenshire's Media Room to access to a bank of inspirational photographs, videos and Destination Narrative. (<http://media.visitabdn.com/>)
- Partner with VisitAberdeenshire on a number of business development opportunities including attendance at events and exhibitions.



TRAVEL TRADE

The German travel market is very mature; there are a few big players dominating the market but also a fair number of small specialist operators with comprehensive Britain programmes.

There are over 2,500 tour operators and 9,000 retail travel agents operating in Germany¹. Although in Germany retail agencies are still more important than in other European countries, internet travel portals are increasingly important for the consumer market.



DID YOU KNOW?

ITB Berlin: Is the world's leading travel trade show and is held in March every year. VisitScotland attends every year and this is a great opportunity for suppliers to come along and take space on the stand and meet buyers face-to-face and build relationships with them.

VisitScotland EXPO: Every year in April, the VisitScotland EXPO brings together Scottish suppliers with global travel trade buyers at the flagship two-day event. The show attracts over 270 Scottish tourism businesses exhibiting to more than 600 tour operators, travel agents, wholesalers and airline vacation brands from 31 countries around the world. This is again a fantastic opportunity for suppliers to meet face-to-face with buyers from their target markets and develop those relationships.

ONE MORE THING

If you are sending a German tour operator an email, there is every chance that they are receiving hundreds more, so do your research first, make sure you tailor your approach to suit their needs and if you can, send in German and personally addressed.

Key takeaways about working with German travel trade

- 1 Before you contact a German tour operator to see if they are interested in working with you, you must **do your research**. Do they feature your area or region? Talk to VisitScotland: they will be able to help you
- 2 **Register your business** on VisitScotland's Travel Trade site - <https://traveltrade.visitscotland.org> and also on <http://trade.visitbritain.com/en>
- 3 The role of travel agents and tour operators is still important in Germany with **32%² of German trips** abroad (to all destinations) being organised by travel agents
- 4 As well as a number of large key players, Germany has many **smaller specialist tour operators**
- 5 Many German tour operators **work through Scottish and UK-based destination management companies** (DMC's) or inbound tour operators, but many will work directly with Scottish suppliers too – do your research first so that you won't waste your time and theirs. Working with large DMCs is a distinct advantage to get a foot in the German market
- 6 The VisitBritain German office is there to support you and can **assist you identifying which operators are most suitable for you to work with**. <https://www.visitbritain.org/contact-finder>
- 7 Remember you need to **consider commission rates** which are in the region of 15-20% to tour operators and 10-12% for travel agents
- 8 Large tour operators research their main season programmes **between April and June**, with off-season / city break operators doing their research in March and April, the year before putting itineraries on the market
- 9 It can take time to get listed in German B2C brochures. The German trade has a big focus on relationships so **loyalty and relationship management is crucial**
- 10 Due to the strong regional structure of Germany, tour operators are evenly spread throughout Germany, but there is a concentration in the **Frankfurt, Munich, Hamburg and Düsseldorf / Cologne areas**

¹ Source: VisitBritain

² Source: Reiseanalyse 2016

Opportunities for business



Get social

The growth of social media in tourism has been exceptional and it is now one of the most important marketing tools for tourism businesses. It's also something visitors are using increasingly: before, during and after their stay. Social media has changed the way the world connects, communicates and shares information. VisitBritain commissioned research to look at the role of social media in the context of overseas holiday. The project was run in four markets: USA, South Korea, India and Germany.

The main results for the German market are:

- **Language is important: promotions and information should be in German if you are targeting the market**
- **77% of Germans use social media whilst on holiday**



Blogging as a marketing tool

There are more than 152 million blogs on the internet, with a new blog being launched every half-second.

Within this phenomenon, travel blogging has become highly popular and is being used more and more by tourism businesses and destinations for marketing purposes. Blogging is an effective, cost-efficient tool for telling your story, creating awareness, building an image and reaching new target groups. Blog content is customised, measurable and easier to control than traditional media. Blogging can also have a positive effect on the Google ranking for your business.

Savvy businesses increasingly recognise the important role bloggers can play in their marketing mix. Bloggers are often a PR pro, copywriter, photographer, videographer, SEO guru and social media specialist all rolled into one. They are unlikely to have the same reach as traditional media. However, what bloggers lack in coverage, they make up for with an opportunity to engage with niche audiences at a fraction of the cost of conventional methods.

It's their job to write or capture creative content and cultivate engaged followers. They can also be useful in explaining practical advice and experiences in their own language. German travel blog sites Reiseblogger Kollektiv and the European travel blog iambassadors work with many brands and blog to their German followers.

iambassador

REISEBLOGGER KOLLEKTIV

DID YOU KNOW?

The internet is the top source for both leisure **(78%)** and business **(80%)** travel planning





XING

XING (usually pronounced kxing or crossing) is one of the main pillars of the German social media landscape.

Today, it is used by 7.4 million members in German-speaking countries and around three-quarters of the site's traffic comes from Germany itself.

XING has company pages which allow businesses to promote their products and services and post vacancies.

So why are Germans embracing XING much more than other social media like Twitter? Social media blogger Melvin Böcher of Traveldudes believes being built by Germans for German (speakers) has something about it, but there is another reason for XING's success and Twitter's slow start:

"Twitter is about news and instant information, and I think that there is reluctance among Germans to get bogged down in irrelevant information. It is also a much less spoken language than English, and so the quantity of 'news' is that much less. One other thing I would say: the Germans may well adopt all of these tools in due course. I get the feeling that in a few years' time, Germans will be avid users of Twitter too."

IDEAS TO TRY: Set up a company profile on Xing and start networking



Guide books

If you are interested in targeting the German market, buy copies of popular guide books to see if you are listed or featured. The easiest way is to purchase them online as it is unlikely your local bookshop will stock them. If you are listed, then keep the editor/publisher up-to-date with any new product developments and services for German visitors. If you're not listed but feel you have an interesting product that would really appeal to German holidaymakers, contact the editor/publisher with information for possible inclusion in the next update of the guide. You can also invite the editor or the researcher to visit you when they are in Scotland to research the next edition.

Popular German guidebooks are:

- ADAC – Reiseführer Schottland
- Polyglott on tour Schottland
- Schottland – Reiseführer von Iwanowski
- SCHOTTLAND MARCO POLO REISEFÜHRER
- Baedeker Reiseführer Schottland
- NATIONAL GEOGRAPHIC Spirallo Reiseführer Schottland
- DuMont Reise-Taschenbuch Reiseführer Schottland
- DuMont direkt Reiseführer Edinburgh, Glasgow, Highlands
- DuMont Reise-Handbuch Reiseführer Schottland
- DK Eyewitness Top 10 Travel Guide: Scotland

IDEAS TO TRY

Walking is part of many German visitors' itinerary, even if they are touring by car. Can you suggest any local walks to them? They may want to leave very early in the morning to start a particular walk: offer early breakfast or packed lunches if they stay with you.



Be Inspired

Some Aberdeen & Aberdeenshire-based businesses share how they have made it work for them when targeting German visitors.



Mill of Nethermill Holidays



Bill and Lynn Pitt of Mill of Nethermill Holidays have been welcoming German visitors for many years. Here they offer some tips gathered over the years.

“Germans are known to book early, in many instances up to a year in advance. Don’t wait till the season commences to market to them. By the time March rolls around, most Germans have already booked.

Germans come to Scotland for the Scottish experience. They want tartan, tweed and thistles. They love distilleries – many visit more than one – and they all want to go to Loch Ness.

Germans like to interact with locals and look for recommendations on where to go and where to eat. Most don’t research what there is to do in the area. They tend to use German guide books, while older German visitors can find the language barrier a challenge.

German guests rarely use credit cards so PayPal is a preferred option to pay in advance for accommodation.”

Glen Tanar Estate



Glen Tanar’s self-catering cottages are listed on German website www.schottlandberater.de along with many other destinations in Scotland. The Estate also worked with an experienced German tourism consultant to improve its own website to appeal more to the German market.

The revamped Glen Tanar website has a German page with key information German holidaymakers want and need to know, based on insight from the consultant. Working in partnership with a German tour operator has strengthened the Estate’s presence in the European tourism market.

GolfAberdeenshire



Over the last three years, GolfAberdeenshire has worked with marketing firm Helma Scheffler to target the German and European market. The comprehensive campaign aims to generate media coverage and grow the number of golf visitors to the region by highlighting direct airline connections.

The campaign successfully featured famous links and lesser-known golf courses and developed special golf packages. Promotion in golf, travel and lifestyle media, as well as via travel trade operators and golf clubs in Germany, was supported by individual and group familiarisation trips to Aberdeen & Aberdeenshire.

The Scottish product knowledge and local German contacts of the in-market firm were invaluable to the campaign’s success. Regional partners, from hotels to golf courses, responded quickly to enquiries and also created new packages with non-golf elements to showcase the wider appeal of Aberdeen & Aberdeenshire.

Down on the Farm



For German visitors looking to enjoy authentic Scotland, unspoilt countryside and coastal scenery are big attractions. Luxury glamping, Down on the Farm offers stunning Aberdeenshire countryside and uninterrupted sea views, with picturesque fishing villages nearby.

German guests comprise Down on the Farm’s largest number of European visitors. They enjoy cooking outdoors, exploring the farm or following owner Carole’s tips for days out or what to see in the local area. She also includes useful information in a guest folder and has even played the bagpipes for guests celebrating an anniversary.

Next steps



How do I know if my product will appeal to the German holidaymaker?

Before you start selling your product overseas, it's important to understand the match or fit between it and German holidaymaker demands. In broad terms, there is potential for every product in every market, but to help determine which markets offer the best potential for your product and those in your local area, ask yourself these questions:

1. **Is your product / experience readily accessible** to potential customers in the appropriate distribution channel (e.g. your relationships with tour operators, the quality of your website)?
2. **How does this market perform for you at present?** Do you have an established track record in servicing it?
3. **Can you capitalise on or respond to the trends/** growth patterns/opportunities in the market?
4. **You must do your research before you contact a German tour operator** about working with you. Do they feature Scotland / Aberdeen & Aberdeenshire? Do they feature similar products to yours?
5. **Talk to VisitScotland and VisitAberdeenshire** – they can help you with information such as who are the main decision makers in the company; how important Scotland is within their total product portfolio; how Scotland has been performing within that portfolio; the kind of products or services they are looking for; and new market entrants.
6. **Many German tour operators work through a Scottish-based destination management company** (DMC) or inbound tour operator, but many will work directly with Scottish suppliers too. Do your research first so you don't waste your time or theirs.
7. **Look for like-minded businesses and develop collaborative marketing promotions** to the German market. Think about how to engage with each other and what they can offer you. How can you work together to benefit all businesses?

DID YOU KNOW?

Royal Lochnagar: A fondness for Scotch whisky among Germans translates to them making up a large percentage of all overseas visitors to Scotland's distilleries each year. Point your German guests in the direction of the distillery nearest to you.

Germans represent 15% of Royal Lochnagars overseas visitors

DID YOU KNOW?

Motorhome tourism is a growing market segment with many companies now offering bespoke hire-drive motorhome holiday experiences. There are over 25,000 motorhome owners in Germany, many of whom travel to Scotland in them.

11% of Ballater Caravan Park visitors are from Germany, many of them using their own motorhomes



Additional Resources and Support

To help you get started, here are some useful organisations and contact details:

Aberdeen City and Shire Hotels Association	http://www.aberdeenhotels.org/
Aberdeen & Grampian Chamber of Commerce	https://www.agcc.co.uk
Business Gateway	https://www.bgateway.com/local-offices/aberdeen
Scottish Enterprise	https://www.scottish-enterprise.com/
VisitAberdeenshire	http://industry.visitabdn.com/
VisitBritain	https://www.visitbritain.org/
VisitScotland	http://www.visitscotland.org/
Department for International Trade UK Trade and Investment Germany	https://www.gov.uk/government/world/organisations/departement-for-international-trade-germany
German Consulate General Edinburgh	http://www.uk.diplo.de/Vertretung/unitedkingdom/en/02/2Edinburgh/___Edinburgh.html
The German-British Chamber of Investment and Commerce	http://grossbritannien.ahk.de/en/
British Council in Germany	https://www.britishcouncil.de/en

ENDNOTES

1 / 2 Source Reisanalyse 2016

3 Source: ReiseAnalyse 2016 Survey of German consumers

4 Source: Google Travel Study, June 2014, Ipsos MediaCT

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