enjoyEngland

Germany market profile
updated January 2006

GERMANY
Market profile

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1) Market snapshot

GENERAL MARKET CONDITIONS	• Population 82.4 million – slight growth & ageing • IMF Forecasts 2006: GDP (based on PPP per capita) USD$31,472. GDP Growth Rate 1.2%. Unemployment 9.3%. Inflation 1.7%
ACCESS OVERVIEW	• NO visa required • By Air – 18 German airports offer regular daily services to England. • The Cuxhaven to Harwich ferry service is currently suspended.
MARKET SIZING / MARKET SHARE	• 77.9 million outbound in 2004. England has 3.2% market share • UK ranked 6th outbound destination (top) • 2.5 million visits in 2004 (+15% on 2003) • £701m spent in 2004 (+4% on 2003). AEV £285; AED £49
MARKET SHAPE / MARKET DYNAMICS	• 36% are HOLIDAY visitors; 30% BUSINESS • 74% stay 1-7 nights • 57% visit between July and December • Top Towns = London, followed by Birmingham, and Manchester
PRODUCT / MARKET FIT	• History / Heritage / Culture, Landscape and scenery and Nightlife.
DEMOGRAPHICS / POTENTIAL CONSUMER SEGMENTS	• Youth / Young Urban Professionals / DINKS / Top Earners / Business Travellers
REACHING THE GERMAN CONSUMER	• Internet access 55%

2) General market conditions

Population / languages

The US Census Bureau puts the population of Germany at 82.4 million in 2004.

The population is forecast to remain fairly stable with a slight decline to 82.0 million by 2014. The proportion aged 50-59 is expected to increase.

Language: German.

Economics / politics

After a number of months during which no political decisions were taken in Germany due to the inconclusive elections the nation finally has a new Government. The 'Grand Coalition' may however find implementing many of the structural and economic reforms that many analysts believe necessary, a challenging goal if the disparate viewpoints of leading figures in the coalition are to be addressed. For example, the mooted increase in VAT set for 2007 is now being talked about as a possibility rather than a certainty.

German consumers have been very reluctant to spend in recent months and years which has fed through to a weak retail sector, low levels of production and consequently high levels of unemployment. Unemployment does now appear to have peaked, but at a rate higher than one-in-ten of the labour force.

German businesses seem more optimistic than German consumers at the present time, despite the recent small increase in base rates.

The Economist expects German economic activity to pick up marginally during 2006, but highlight the risk that if the US economy were to slow, or the Dollar to weaken significantly against the Euro, then Germany would struggle once again to reach growth rates that have historically been considered as representing the long-term average.

Holidays / annual leave

German employees receive an average of 25-30 days annual leave, plus up to 10 public holidays a year.

German employees are also entitled to one week of 'Bildungsurlaub' (self-improvement holiday) in all states and up to six weeks leave for health cures.

Their average working week of just 37 hours is one of the shortest in Europe.

The status of holidays generally is also very important. The holiday is the commodity that Germans are least prepared to give up, and holiday taking, it seems, has little to do with the prevailing economic or social conditions. Holidays are either taken in spite of them or because of them. In bad times holidays are considered necessary to escape from the pressure of life; in good times they are seen as natural rewards for success.

3) Access overview

Political situation

No political issues currently exist to restrict travel to England from Germany.

Passport and visa issues

German visitors do NOT require a visa to visit England.

Gateways / access to England

In 2004 (IPS), 67% of visitors from Germany travelled to England by air, 28% by sea and 5% by tunnel.

By air

Some 18 German airports offer regular daily services to England, with a good mix of routes operating to the regions of England as well as to airports in the South East of England.

Flights are offered by both full service airlines and low-cost operators based in both Germany and England.

Departure gateways – Altenburg, Berlin (Schoenefeld/Tegel), Bremen, Cologne, Dortmund, Duesseldorf, Frankfurt, Friedrichshafen, Hahn, Hamburg, Hanover, Karlsruhe, Leipzig-Halle, Luebeck, Munich, Muenster-Osnabrueck, Niederrhein, Nuremberg, Paderborn and Stuttgart.

Arrival gateways – Birmingham, Bristol, East Midlands, Liverpool, London (LHR, STN, LCY, LTN, LGW), Manchester, Newcastle, and Southampton.

By sea

The Cuxhaven to Harwich ferry service is currently suspended.

4) Market sizing/share

Current & forecast market size

Global Insight estimate that there were 77.9 million outbound overnight visits from Germany in 2004.

There are forecast to be 89.4 million such trips by 2010, an increase of 15%.

England currently accounts for around 3.3% of outbound trips from Germany.

Current volume and value statistics / trends

	2003	2004	Change year on year
Total Visits	2,140,000	2,462,000	+15%
Visits Rank (League Table No. Visitors to England)	3	3	No change
Total Spend	£674m	£701m	+4%
Spend Rank (League Table £ Spend in England)	2	2	No change
Average Spend per Visit (AEV)	£315	£285	-9%
AEV Rank	Outside top 30 rankings		
Average Spend per Day (AED)	£51	£49	-4%
AED Rank	Outside top 30 rankings		

Source: IPS

Key competitor destinations – actual

Although this does not separate out England, the Global Tourism Navigator shows us that the UK was 6th in the actual ranking of top destinations (short and long haul included) for German outbound travel in 2004.

1	France	**6**	**UK**
2	Austria	7	Greece
3	Spain	8	Netherlands
4	Italy	9	Switzerland
5	Turkey	10	Sweden

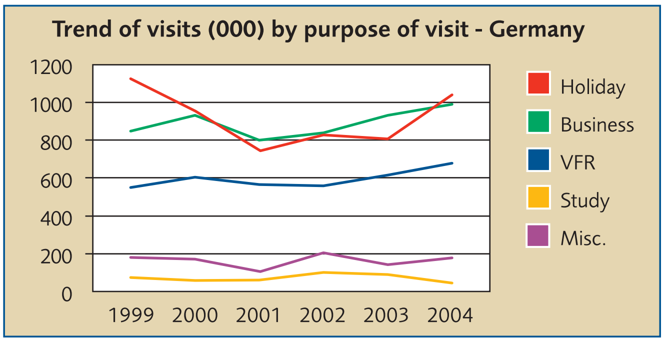
Key competitor destinations - aspirational

According to the Anholt-GMI Nation Brands Index (Wave 3 2005), which surveys a representative n=1000 sample of the online population in Germany, the UK is ranked 10th out of 24 (i.e. not all potential are asked about) destinations that would be likely for a leisure visit "if money were no object".

1	New Zealand	6	Italy
2	Australia	7	France
3	Canada	8	Ireland
4	Sweden	9	Switzerland
5	Spain	**10**	**UK**

5) Market shape/dynamics

Purpose of visit

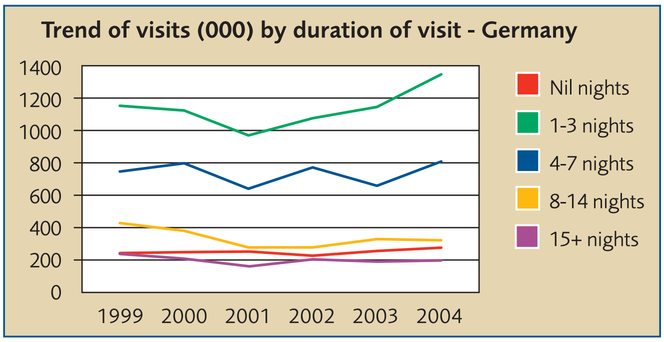


36% of the visitors from Germany to England come for a holiday

30% travel to England for business purposes.

26% visit friends and relatives (VFR).

Length of stay



83% of German visitors stay in England for less than 8 nights with 46% coming for a short break (1-3 nights).

20% of holiday visitors stay in England for over a week. The holiday short-break market accounts for 38% of holiday visits.

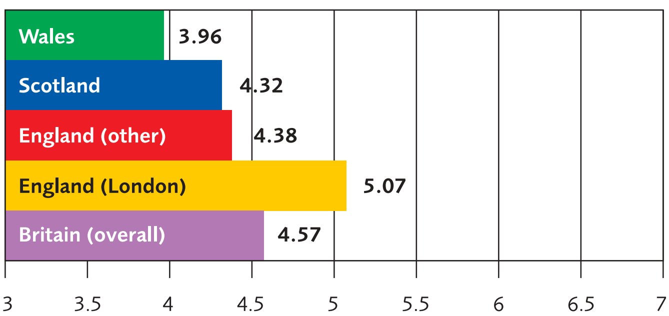
VFR visitors tend to stay a little longer with 28% staying in England for 8 nights or more.

Regional spread / top towns

Top Towns for German visitors in 2004 were: London, (1,173,000 visitors), Birmingham (107,000), and Manchester (74,000).

The GMI Nation Brand Index research (2005) asked 1,000 German respondents about their awareness of the regions of Britain. Participants were asked how well they felt they knew the regions of Britain - giving a score of 1-7 and taking into account any of the ways they had learned or heard about each region. 1 = never heard of the region and 7 = know the region very well.

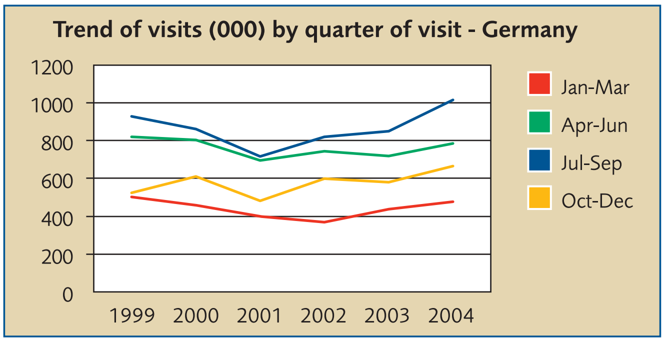
The chart below shows that for German respondents, London is the best-known region, followed by Britain overall. The rest of England, excluding London, is better known than Scotland and Wales is the least well known.



Looking at the 546 Germans who have visited Britain all mean scores improve, particularly for London, which increases to 5.56 in awareness.

The top English regions visited by Germans in 2004 were London (1,173,000 visitors), South East (435,000) and the South West (230,000).

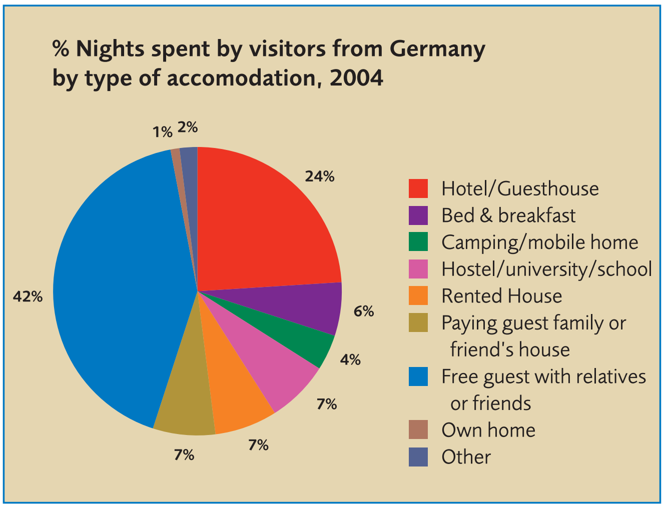
Seasonal spread



The summer months from July to September are the most popular period for German residents to visit England (34%).

This is also true of those on holiday and those visiting friends and relatives with 42% and 29% respectively preferring the warmer months.

Accommodation type



46% of visitors from Germany to England stay in a hotel or guesthouse and 32% stay as free guests with friends and relatives.

53% of holiday visitors stay in a hotel or guesthouse.

87% of VFR visitors are stay as free guests.

70% of business visitors stay in a hotel or guesthouse.

6) England's brand image in Germany

The main pillars of the England brand in Germany are Discover, Fun and Indulgent. The England brand model can be said to be describing 3 key Need states ('The 3 Pillars'):

- **Discover** The need to absorb, learn and experience.
- **Fun**: The need 'To Do', to be active and proactive, avoiding sitting around doing nothing, bonding with friends and family, letting off steam, etc.
- **Indulgent**: The need to 'Reward yourself' to counter act the stresses and strains of modern everyday life.

These elements of the brand are shown in the brand wheel below:

Perceptions of England

Project Lion Brand Development Research carried out in Germany in 2002 discovered that for a large number of the German respondents, the picture of England as a holiday destination was clear. England was contrasted most directly with the southern European countries (sun, beaches and pure 'inactive' relaxation), to highlight it as a place for learning and immersing oneself in the history and culture. In many ways, England was seen as the ideal destination for 'Bildungsreisen'– a journey of personal development.

Overall, England was seen as offering a calm, peaceful and contemplative holiday, which would typically include the sights of London, yet take in other cultural aspects like the Shakespeare's Stratford and what was perceived to be the 'mystery' and romanticism of (Scottish) castles.

There was a definite sense of intrigue about the local way of life in England, which was felt by most to be difficult to really discover, but remained appealing nonetheless.

This rich 'experiential' image was strong amongst those who had already visited England and were contemplating a return visit. Of course, part of this experience included, though was certainly not dominated by, the historic sights of London, especially for the first time visitor.

It was evident amongst younger respondents that a rather London-centric view of England had built up, with a much livelier and exciting twist. A weekend city break to the city had become a prime motivator to visiting England.

On a negative note, the attitude still prevails amongst many (especially those yet to visit) that outside of London, England is a largely urban and industrial landscape, with its coast littered with ports and shipyards. There is also a persistent image of England having bad food and a poor climate!

For the majority of respondents, England was not deemed to be a very family-friendly holiday destination. This was down to two factors. Firstly, England was felt to be prohibitively expensive to couples with children. Secondly, many believed England did not offer much in the way of child entertainment, specialising rather in cultural and historical diversions. This fitted the general picture of England promising a holiday of 'active' relaxation; that is, on your feet in the city or countryside where the children would get tired and bored.

7) Product / market fit

What products / experiences are most attractive to German visitors?

History / Heritage / Culture

Germans that are fond of England are particularly keen on English history and culture.

Landscape and scenery

England is considered to be a stylish destination with a stunning landscape and a rich culture.

Nightlife

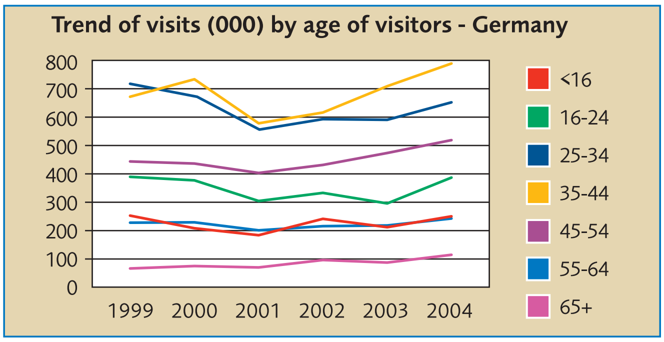
The image of England's youth culture in terms of music and fashion is very strong in Germany and the German youth are keen to experience England's nightlife.

Additional research planned

Enjoy England has a research programme in place to examine perceptions of England as a holiday destination amongst Germans. Research is planned for April 2006. The barriers and triggers to travel in England will be examined while insights for creating effective marketing communication with German visitors will be generated.

8) Who is the German visitor?

Demographics



29% of visitors from Germany are aged over 44. The proportion of this age group is a little larger amongst VFR visitors (32%).

Age Group	Male %	Female %
0 - 15	6	12
16 - 24	9	20
25 - 34	21	24
35 - 44	32	18
45 - 54	20	14
55 - 64	9	7
65+	3	5

Travelling Group 2003	% of Visits
Lone traveller	45
As a couple/with partner	16
Group of friends	7
Family group	16
Business colleagues	10
Tour group	5
Other	0
Don't know	2

In terms of Travelling Group – 45% of the German visitors were lone travellers in 2003.

Key market segments

As in many other markets, the well-educated middle and upper-middle classes form the bulk of the market to England.

VisitBritain has selected the following target customer groups in Germany as having the most potential for England in terms of attractiveness and ease of reach:

1. '**Youth**' – aged between 14-19 years participating in educational group outings, and young people in the 16-25 age group participating in city breaks or sports events.
2. '**Young urban professionals**' – Couples and singles aged 25-35 interested mainly in London and other English cities (nightlife, shopping, style & design) and activity holidays in the countryside (mainly first-time visitors).
3. '**DINKS**' (Double Income No Kids) – Couples aged 35-50 with no children and a very active lifestyle and a high interest in culture. They are mainly repeat visitors with a positive attitude towards England.
4. '**Top Earners**' – Affluent couples (including retired couples) aged 50+ with an interest in cultural and sports events and up-market accommodation (e.g. country house hotels).
5. **Conference and incentive business travellers**

1st Timers & repeat visitors

In 2004, 77% of visitors from Germany had visited England previously within the last 10 years (IPS).

9) Caring for the German consumer

Language / information provision

Although the majority of Germans (especially the under 50s) speak English sufficiently well, it is still an advantage to have important signs and information material printed in German.

The increasing number of visitors from the New Federal States in particular will appreciate some guidance in German.

Although very few German visitors will expect you to speak German (and indeed most look forward to practising their English), a few basic phrases in German will help to make them feel much more welcome.

Germans can be very straightforward and demanding if they are unhappy with a service or product (see the question of value for money above). Don't be shocked by their directness but deal with any situation promptly and courteously.

Detailed information on all activities planned is very important for German visitors. They usually collect a lot of information before their visit to England and bring several guidebooks along. But be prepared for even more detailed questions about the area, events or suggestions for itineraries or places to visit.

Food and drink

Most Germans will usually have their main meal around lunchtime and only a light snack for supper. Due to BSE and foot and mouth disease there is a strong reluctance to eat meat in England (or in general).

Germans prefer hefty, well-seasoned food and sometimes find it difficult to get used to the traditional English cuisine.

Accommodation

Cleanliness is of major importance for German visitors. Tiled bathroom floors are certainly preferable to carpeted ones and shower cabins more popular than bathtubs. Provide en-suite facilities whenever possible.

Value for money

Value for money is a key issue for Germans. They are willing to spend considerable amounts of money for products and services if they think they are worth it. However, if they feel that they are getting bad or insufficient quality, especially compared to standards in Germany, where prices for accommodation and food are very reasonable, frustration and dissatisfaction can easily occur.

10) Reaching German consumers

Deciding, planning & booking patterns

In 2004, 46% of all Germans used a travel agency to gather information about potential holiday destinations as opposed to 29% using the internet and only 1% using NTBs (source: DZT = Deutsche Zentrale für Tourismus).

In 2004, 59% of foreign trips for Germans were booked through travel agencies (source: F.U.R. Reiseanalyse 2005).

Online / Offline Research was carried out in Germany in 2003 to gain a brief insight into consumers' current usage of the Internet and their preferred method for receiving brochures.

Just over half of the population (56%) intend to travel internationally in the next 3 years.

Source of information

Brochures are the most common source of information used by consumers deciding on a destination (76%) and when planning an itinerary (61%).

When booking a trip, brochures were the second choice (61%) as a source of information.

Rank	Deciding on a destination		Planning an itinerary		Booking a trip	
1	Brochure	76%	Brochure	61%	Travel Agent	74%
2	Travel Agent	63%	Travel Agent	55%	Brochure	61%
3	Internet	58%	Internet	54%	Travel offers	49%
4	Travel offers	56%	Guidebook	52%	Internet	46%
5	Guidebook	52%	Travel offers	48%	Guidebook	27%
6	NTO	17%	NTO	18%	NTO	12%

The internet was less favoured with consumers being the third choice for information when deciding on a destination (58%) and when planning an itinerary (54%). When booking a trip the internet was fourth choice (46%) as a source of information possibly indicating consumers' need to speak to someone face-to-face when close to making a booking.

Brochures

Looking at those who use brochures in more detail, between 21-24% of consumers are between 35-44 regardless of the stage of planning. The remaining consumers are evenly spread throughout the other age groups.

Internet

Around a third of consumers using the internet as a source of information are between 35-44 regardless of the stage of planning. Again the 55+ group accounts for the smallest proportion of consumers that use the internet.

Brochure preference

The majority of consumers prefer to receive a printed brochure (72%), 4% prefer to download a version online and 21% prefer both.

Online environment

55% of all Germans use the internet.

According to the 2004 FUR Reiseanalyse report, 62% of the users had already used the Internet to gather travel-related information. 23% had already used the Internet to book a holiday (or parts of it) online.
The Internet is therefore hugely important in terms of information and marketing.

Media habits

Consumer Newspapers

There are only a few quality newspapers (Sueddeutsche Zeitung, Frankfurter Allgemeine Zeitung, Frankfurter Rundschau, tageszeitung) and one rainbow paper (Bild) distributed nationally, there are plenty of small regional papers often organised in distribution and publishing groups.

Other press

Germany has a wide range of magazines for all different interests similar to the England.

Trade press

In Germany, there is one very important travel trade publication read by all tourism professionals – the FVW (Fremdenverkehrswirtschaft).

Smaller publications are targeted at travel agencies (Travel One, Travel Talk) or coach operators (Busmagazin, Omnibus Revue).

Working with Enjoy England

Taking part in the Enjoy England marketing campaigns is the ideal way to make your marketing budget work harder. Combining detailed knowledge of proven routes to market, with innovative promotional channels and a fresh campaign look and feel, ensures that your brand obtains maximum cut-through in today's crowded market-place.

Different campaign participation levels are available depending on preferred promotional channels and budget available. The packaged opportunities below are designed to offer you maximum exposure for your money, but there is some room for flexibility, according to your needs. Please enquire for further information.

shortbreakEngland (Sept - Dec 06)

Highlighting the excellent accessibility to England from Germany, England's Short Breaks campaigns will showcase the diversity and value for money of England as a short break destination. Focusing on England's dynamic towns and cities, with their blend of the historical and the modern, and the stunning countryside just a stone's throw from England's city centres, the campaigns will use a strong tactical message to encourage consumers to take a short break in England.

Web listing: £3,500

Only available to commercial partners

Level 1: £7,000

Activity	Details
Website	• Enhanced presence on website • Online competitions
Online advertising	• Search Engine Marketing • Generic campaign editorial / advertising on key travel and lifestyle websites e.g. Thomas Cook, Expedia, Web.de, FT Deutschland etc. • Promotion of campaign website on VisitBritain.com/de • Campaign e-viral • Campaign I-leads
Press & PR	• Presence in generic press & PR work for the campaign
E-direct mail	• Presence in e-DM to 60,000 contacts on the VisitBritain Germany database • Presence in e-DM to the England database • Follow-Up E-Mailing to all new contacts

Level 2: £18,000

Activity	Details
Website	• Maximum presence on website • Online competitions
Online advertising	• Search Engine Marketing • Generic campaign editorial / advertising on key travel and lifestyle websites e.g. Thomas Cook, Expedia, Web.de, FT Deutschland etc. • Promotion of campaign website on VisitBritain.com/de • Campaign e-viral • Campaign I-leads • Partner branded online advertising
Press & PR	• Presence in generic press & PR work for the campaign • Entry in Britain update • Dedicated press trip, subject to newsworthiness
E-direct mail	• Presence in two e-DMs to 60,000 contacts on the VisitBritain Germany database • Presence in e-DM to England database • Presence in one e-DM to 25,000 external addresses • Follow-Up E-Mailing to all new contacts

tourEngland (Jan - Apr 07)

Focusing on the highlights of quintessential England, the touring campaign will aim to raise awareness of England's regional diversity - and to showcase what there is to see and do beyond the capital city. With suggested driving tours, featuring key sights throughout the country, this year's campaign will also incorporate a strong walking element, as well as partner-led tactical offers to drive bookings.

Level 1: £6,500

Activity	Details
Website	• Presence on website • Online competitions
Online advertising	• Search Engine Marketing • Generic campaign advertising on key travel and lifestyle websites e.g. Via Michelin, Merian and regional portals. Techniques to include pop ups, pop unders and I-leads • Promotion of campaign website on VisitBritain.com/de • Campaign e-viral
E-direct mail	• Presence in e-DM to the England database • Feature in e-DM to 60,000 contacts on VisitBritain Germany database • Presence in follow up mailing to campaign respondents
Brochure fulfilment	• Quarter page advert in Touring brochure. This will be a 52 page brochure, and 60,000 copies will be produced and distributed
Press & PR	• Presence in generic press & PR work for the campaign

Level 2: £13,000

Activity	Details
Website	• Enhanced presence on website • Online competitions
Online advertising	• Search Engine Marketing • Generic campaign advertising on key travel and lifestyle websites e.g. Via Michelin, Merian and regional portals. Techniques to include pop ups, pop unders and I-leads. • Promotion of campaign website on VisitBritain.com/de • Campaign e-viral
E-direct mail	• Presence in e-DM to England database • Feature in e-DM to 60,000 contacts on VB Germany database • Presence in follow up mailing to campaign respondents
Brochure fulfilment	• Half page advert in campaign brochure. This will be a 52 page brochure, and 60,000 copies will be produced and distributed.
Press & PR	• Presence in generic press & PR work for the campaign • Entry in Britain update
Direct Mail	• Feature in DM to 60,000 contacts from VB database
Supplement	• Presence in England special in *Wandermagazin* (28pp)

Level 3: £ 20,000

Activity	Details
Website	• Maximum presence on website • Online competitions
Online advertising	• Search Engine Marketing • Generic campaign advertising on key travel and lifestyle websites e.g. Via Michelin, Merian and regional portals. Techniques to include pop ups, pop unders and I-leads. • Promotion of campaign website on VisitBritain.com/de • Campaign e-viral • Partner branded online advertising
E-direct mail	• Presence in e-DM to England database • Feature in e-DM to 60,000 contacts on VB Germany database • Presence in follow up mailing to campaign respondents
Brochure fulfilment	• Full page advert in campaign brochure. This will be a 52 page brochure, and 60,000 copies will be produced and distributed.
Press & PR	• Presence in generic press & PR work for the campaign • Entry in Britain update • Dedicated press trip, subject to newsworthiness
Direct Mail	• Feature in DM to 60,000 contacts from VB database
Supplement	• Enhanced presence in England special in *Wandermagazin* (28pp) • Presence in newspaper supplement

Stand-alone brochure advertising

In addition to the campaign packages available, it is also possible to place an advertisement in the German touring brochure.
Rates are as follows:

Full page	£2,600
Half page	£1,500
Quarter page	£800
1/8 page	£450

Additional opportunities

In addition to the Enjoy England consumer campaigns, a number of other marketing activities are available through VisitBritain (e.g. brochure distribution, presence at consumer exhibitions). Please contact VisitBritain for further details.

11) The Trade

Overview of trade structure

There are an estimated 4,000 tour operators and more than 20,000 retail travel agents in Germany. Competition is very fierce and after a series of take-overs and mergers there are now four tourism groups clearly dominating the market. Tour operators are evenly spread all over Germany but there is a concentration in the Frankfurt, Munich, Hamburg and Düsseldorf/Cologne areas.

The German travel trade can be split into three major categories:

- Reiseveranstalter: Tour Operators
- Paketreiseveranstalter: Package Wholesalers
- Reisebüros: Travel Agencies

German tour operators

There are about 250 operators offering England products varying from comprehensive all-England programmes to more specialised products (e.g. golfing holidays). The large volume operators who dominate the market sell mainly through the retail trade and have a widespread distribution network throughout Germany. The smaller, more specialist companies only sell direct to the public through adverts in papers, direct mail or VisitBritain publications. Some of the major operators (e.g. DERTour, Wolters and FTI Touristik) can afford to insist on very tough commission agreements (20% or more) with suppliers.

Package wholesalers (Paketreiseveranstalter)

These are package operators selling ready-made tours mainly to coach operators although they increasingly also offer flight packages and group travel generally. Due to the recent problems with constant changes in the exchange rate, more and more small and medium-sized coach operators are now buying packages from German wholesale operators rather than from handling agents based in England as this grants them more financial stability. Coach tour companies are becoming increasingly specialised in areas such as themed and special event tours. Larger package wholesale companies, especially, produce an impressive volume of business to England and can afford to ask for fairly tough conditions.

German travel agencies (reisebüros)

The majority of retail agents only sell the larger tour operator programmes and concentrate on products from the few big players to achieve higher commission levels. There are about ten big chains of retail agents with branches all over Germany, most of which also arrange ad-hoc group travel. However, the number of independent, small agencies is still very large. Due to new high insurance costs introduced two years ago, most agencies have stopped doing ad-hoc group arrangements.

Reaching the German travel trade

Sales calls

Germany is a large regionalised country with the travel trade concentrated around several cities, often with large distances between them. Therefore, before you embark on what could turn out to be a very costly and time-consuming sales visit to Germany, we recommend that you take the following steps:

- Talk to Enjoy England London about our range of services to enable you to target your customers more effectively.
- If you do decide to visit Germany it is essential to make appointments. An introductory letter or fax is essential (not necessarily in German) with relevant background information.
- It is important to consider the timing of your visit. The large tour operators research their main season programmes between April and June. Some may visit England during this time to contract accommodation and visit new attractions/regions/products to be included. These programmes are costed between July and September and launched in November/ December. The smaller specialist operators tend to research their programmes slightly later in July/September for a launch in January/ February. Off-season/city break operators research their winter programmes in March/April and launch them in July/August.
- Check to ensure that your trip does not coincide with a public holiday (see below). As is the case in England, many Germans take a long weekend around these, especially in the spring and summer.
- Check on whether there is a large trade fair happening in the city you are visiting, as it may be impossible to find a hotel room.
- Provide the operators you are visiting with a comprehensive information pack (preferably in German) about your product. On your return to England ensure that you follow up quickly and renew contact regularly.
- Keep in touch with Enjoy England; let us know about your progress. Regular market intelligence is essential for our future plans and activities.
- Bear in mind that it is not going to happen overnight! Germany is a huge, complex and very competitive market that requires hard work and commitment. It may take several years to become established and to achieve any sort of return.

Public holidays 2006

January 1, January 6 (not all states), April 14, April 16, April 17, May 1, May 25, June 4, June 5, June 15 (not all states), August 8 (Augsburg), August 15 (Bavaria, Saarland), October 3, October 31 (not all states), November 1 (not all states), November 22 (Saxony), December 25, December 26,

University holidays are from mid-February to mid-April and mid-July to early October. Six-week school holidays vary from state to state, and fall in the period from July 1 to September 13. Easter and Christmas holidays also vary considerably.

12) Business visits / events

Business visits statistics

34of travel from Germany to England is for business purposes, and this accounts for 32% of spend (IPS).

Business visitors Germany	Visits 2004 (000)	% Business visits	Spend 2004 (£m)	% Business spend
Trade Fair / Exhibition	30	3.0	10	3.7
Conference / Large Meeting	83	8.4	33	12.3
Other Business	882	88.6	221	84.0
Source: IPS				

Business visitors Germany	AEV (£)	AED (£)	ALS (days)
Trade Fair / Exhibition	322	124	2.6
Conference / Large Meeting	389	141	2.8
Other Business	251	89	2.8
Source: IPS			

German Business visits are made up of 11% Conferences, Large Meetings, Trade Fairs or Exhibitions and 79% individual business travel.

Meet England – business visits & events opportunities

Hospitality England campaign - Winter 2006

Sponsorship Packages from **£1000**

Dedicated campaign to promote the wide range of sporting and non-sporting hospitality activities geared towards the corporate and incentive markets.

Suitable for Venues & Attractions offering corporate hospitality packages, Corporate Hospitality Agencies, Ticket Agents, Hotel Groups (offering bespoke packages).

English country conferences - Spring 2007

Sponsorship Packages from **£1000**

Business Meetings, Conferences and Incentives at countryside venues are the theme of this campaign, which will include Country House Hotels, Conference Centres and Stately Homes.

Meet England's cities workshop - Frankfurt, October 2006

Workshop style 'cities' event incorporating lunch followed by partner showcases.

Level 1: Destination Partners: **£1,750 allows for 3 partners (max 5 people per stand)**

Level 2: Individual Suppliers: **£500 (max 2 people per stand)**

Suitable for City Destinations, Hoteliers, Unique Venues and DMCs

13) Enjoy England in Germany

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Further information

For any further information relating to the German market, please contact the London-based International Markets Team (see above), or visit VisitBritain's dedicated website for the UK tourism industry:
www.visitbritain.com/ukindustry

Visitor's Voice is a quarterly newsletter offering insights from our latest research and can be obtained each quarter by signing up for VisitBritain's e-bulletin, UK Industry News, at www.visitbritain.com/ukindustry.

To find out more about VisitBritain's research visit
www.visitbritain.com/research.

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Information sources used to compile this report

International Passenger Survey figures (IPS) 2004 (Office for National Statistics)

NB: Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here.

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