Media Landscape Snapshots

- **Traditional media beat Social – in terms of trust and reliability**. While this is a trend around the globe, Germans in particular rely on newspapers, magazines and electronic media for their information needs. Here classic channels beat social by 68 to 32 percent. Overall Germans trust the most: Private companies (+3% for a total of 47%), NGOs (+7%, total 44%) and media (+2%, 44%). On the other hand, trust in the government has decreased (-3%, total 40%).

- **TV and Radio continue to be the most popular media channels in Germany** – being used by 93% of the population with a daily average consumption of 223 minutes (TV) and 177 minutes (radio). However, PR opportunities are limited – in particular with public TV and radio channels. Next in line in terms of popularity are books (90%) and newspapers (85%), followed by cinema (84%) and online videos (77%). Some 75% each read consumer magazine and watch DVDs/Blu-ray.

- **The German media landscape continues to be very diversified and de-centralized**. Just looking at newspapers: There are more than 300 daily local and regional ones, seven national dailies, 22 weeklies and six Sunday papers. There is an even bigger variety of magazines with almost 1,600 titles catering to every special interest. If you have a chance, go to the newspaper shop at the train station – you will be impressed by the vast number of titles you can find in the shelves.

- **Traditional publishing houses going new ways.** As all over the world, people – in particular the younger generation – are moving online. Accordingly print circulations – both of newspapers and magazines – are declining. At the same time online outlets of traditional media as well e-paper versions are gaining popularity.

Media Landscape Snapshots

- **Blogger – Influencer** There have been discussions about the role bloggers and in particular influencers take in the media scene. Established bloggers often work like journalists and have the same needs and standards in their research. On the other hand, there are an increasing number of influencers – taking a commercial approach and requiring a budget for a cooperation (often quite substantial amounts). However, there continue to be issues (e.g. scandals about “paid followers). German courts have also ruled that influencers need to mark their posts as being “advertising”, if bases on a paid cooperation. It is important to thoroughly evaluate the target group, reach and standing of an influencer.

Some PR Conclusions

- **Opportunities exist for quality PR content and assets** like photography, info graphics or audio press kits (for radio stations and podcasts). Publishing houses continue to lose not only readers, but also advertising clients (for daily newspapers, this applies not only to the travel section, but also to traditional cash cows like real estate listings or job advertisements). Publishers´ cost cutting programs, including reduced editorial staff, open the doors for well-done PR materials.

- **Videos and visual content** gain importance in the digital world - providing opportunities to place b-roll/videos in professional quality.

- **New opportunities open up by “dressing travel topics up” and storytelling**. With the number of travel-focused channels diminishing (e.g. travel TV programs), PR professionals need to think beyond the travel section – for example general interest, culinary, health or service. For storytelling it is key to tap market buzz words and trends, which noble keeps abreast of regularly.

Another PR Conclusion

- **Integrated advertising spend to maximize budgets.** It is a fact that border lines between marketing, sales and PR in media are dwindling. We can help to explore media coops involving various elements like advertortials, sweepstakes, as well as editorial generating a much higher value than a traditional ad.

Market Snapshots

- **More Germans have travelled than ever before** in the 2018 season and the travel intensity has reached its peak. According to a representative survey of 3,000 Germans aged 14 and over, 62 percent of the population packed their suitcases last year. The travel intensity has increased in every age group, but most strongly in the generation over 55 years (from 51% to 56%) and especially within the group of 65- to 74-year-olds. While in 2017 only 50 percent of them travelled, by 2018 this figure had risen to 61%.

- **Germany continues to be the most popular destination** for Germans with **a 34% market share**, followed by Spain (12.7%), Italy (9.6%), Austria (4.7%), Turkey (3.7%), Scandinavia (3.7%) and Greece (3.6%). One out of eight German holidaymakers took a long-haul trip in 2018. Among non-European destinations, Asia was the most popular (2.8%), followed by North America (2.7%). Germans travelled around 13 days on average.

- **For the first time in five years, the duration of trips decreased slightly.** This was due to fewer long-haul trips than in the previous year, which lasted more than two and a half weeks (18 days). In Germany holidaymakers spend ten days at their German holiday destination (10.3 days) on average, whereas holidaymakers to other European countries stayed on average three days longer (13 days).

Some More Market Snapshots

- **About 90 % of German consumers do their research online, but the majority still book through a travel agency.** Consumers feel safe**r** when booking with an agent and appreciate the personal service and more importantly they feel secure. The most frequently used marketing tools for inspiration and information in holiday planning are brochures/flyers/catalogues and travel agency advice, followed by accommodation and destination websites. Online travel portals and videos on Youtube are particularly popular with the younger traveler.

- **German travelers are increasingly looking for authentic experiences** and these have bec**o**me key factors in choosing a holiday destination. They love to explore the destination with a strong focus on the outdoors, culture and history. Due to their long length of stay compared to other source markets, travelers spend significantly more on spot, such as **o**n restaurants, shopping, museums and excursions.

- **Germans want to learn something new on holiday: In a survey conducted by Booking.com, 56 % said that they wanted to acquire new skills during a cultural exchange. More than 30% think an international** internship or voluntary work abroad is good. Simplification through technology is just as high on the wish list as the real-time tracking of luggage or the use of an app that takes care of the all-round planning of the trip.

Some More Market Snapshots

- **Luxury travelers in Germany want not only five-star hotels and top comfort but also unique experiences and quality time with their family**, according to a new survey as well as specialist tour operators. High-end customers want a mix of traditional luxury travel products and new elements added to their holidays. The main results for tourism showed that luxury customers are paying more attention to internet ratings and reviews, but a five-star standard remains by far the most important factor.

- **The market outlook is positive** and the indicators for tourism demand in 2019 are showing a good starting position. This is particularly due to the stable economy, low unemployment rate and low interest rates. In their assessment of economic development, Germans are clearly positive about their own situation: 25% expect their personal economic situation to have improved in a year; 19% fear a deterioration. The remaining 56% see no change.

Sources a.o. Edelman Trust Barometer 2019; SevenOne Media Study; Stiftung für Zukunftsfragen Tourismusanalyse 2019

thanks for your interest!

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