

# Germany Market Profile

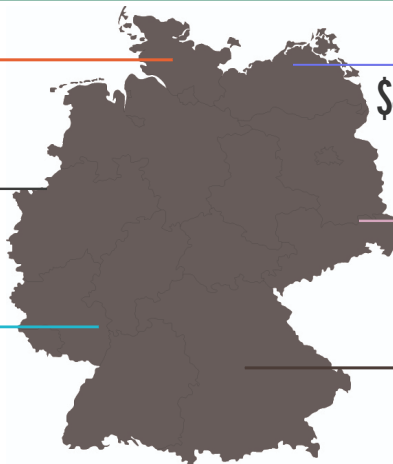
This summary provides the most up-to-date data available on Germany as it relates to their people and economy, travel related motivations and planning behavior and German visitor profile specific to Arizona.

## GENERAL COUNTRY PROFILE

POPULATION:  
80.6 million

INFLATION RATE:  
1.6%

EXCHANGE RATES (EUR PER USD):  
0.89



GROSS DOMESTIC PRODUCT (GDP):  
\$4.15 trillion (2.1% annual growth rate)

EXPORTS:  
\$1.4 trillion

UNEMPLOYMENT RATE:  
3.8%

Source:  
The World Factbook, reporting 2017 estimates

## TRAVEL MOTIVATION AND PLANNING



### Top Travel Motivators

**38%** Cultural/Historical Attractions

**36%** Ecotourism and Nature

**36%** Dining/ Gastronomy



### Source used in Destination selection for last leisure trip

**57%** Websites via computer or laptop

**39%** Recommendation from family & friends

**31%** Information in printed travel guidebooks

**25%** Advice from travel professionals/travel agents



### Advance Decision Time

**20%** Less than a month

**13%** 1 to 2 months

**32%** 3 to 5 months

**24%** 6 to 12 months

**7%** More than 1 year



### Lodging Reservation made before leaving home

**76%** Yes

**40%** Internet Booking Service\*

**21%** The Lodging Establishment Directly

**33%** Travel Agency/Tour Operator/Travel Club

**4%** Other

**24%** No

\* assume "Internet Booking Service" is an Online Travel Agency (OTA).



### How Air Reservations were Booked

**30%** Directly with Airline

**47%** Travel Agency/Tour Operator/Travel Club

**23%** Internet Booking Service\*

**5%** Corporate Travel Department

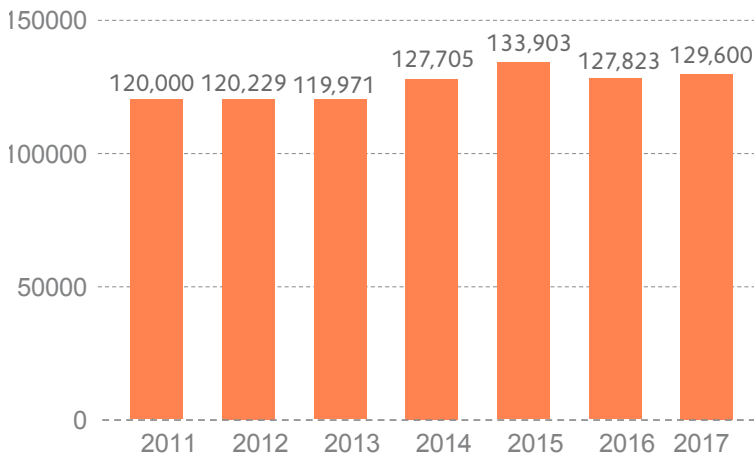
\* assume "Internet Booking Service" is an Online Travel Agency (OTA).

Source:  
Brand USA, reporting 2017 intercontinental traveler data  
U.S. Dept. of Commerce - NTTO, reporting 2014-16 data

# GERMAN VISITATION TO ARIZONA



## Visitation Volume to Arizona



## Port of Entry

**30%** Los Angeles, CA

**19%** San Francisco, CA

**8%** Las Vegas, NV

**7.5%** Chicago, IL

**5%** New York, NY



## Transportation in U.S.

**75%** Rented Auto

**39%** Air Travel between U.S. Cities

**34%** City Subway/Tram/Bus

**22%** Auto, private or company

**19%** Taxicab/Limousine



## Accommodations\*

**72%** Hotel/Motel

**17%** Private Home

**17%** Other

\* since this is collected through a survey, there is no indication if this is paid or non-paid.

Source:  
 Tourism Economics, reporting 2011-2017 data  
 VisaVUE Travel, reporting 2017 data  
 U.S. Dept. of Commerce - NTTO, reporting 2014-16 aggregate data



## Visitor Characteristics

**40 years** Average Age

**\$102,455** Average Household Income

**2.0 persons** Average Party Size



## Length of Stay

**5.2** Nights per Destination

**25.8** Nights in U.S.



## Main Purpose of Trip

**95%** Leisure

**83%** Vacation Holiday

**7.4%** Visit Friends/Relatives

**3%** Education

**7.7%** Business

**3.7%** General Business

**2.6%** Convention/Conference/Trade Show

\* includes trips with multiple purposes



## Visa Credit Card Travel Spending

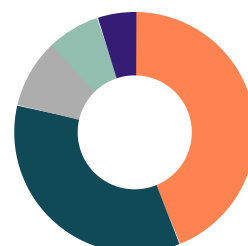
German Visa Card Spending ranked #5 in 2017 with 3.3% of total International Travel Spending in Arizona.

### By Quarter



Q1: 13%  
 Q2: 30%  
 Q3: 38%  
 Q4: 19%

### By Arizona Region



Northern: 44%  
 Phoenix & Central: 35%  
 West Coast: 9%  
 Tucson & Southern: 7%  
 North Central: 5%