

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:
80.5 million

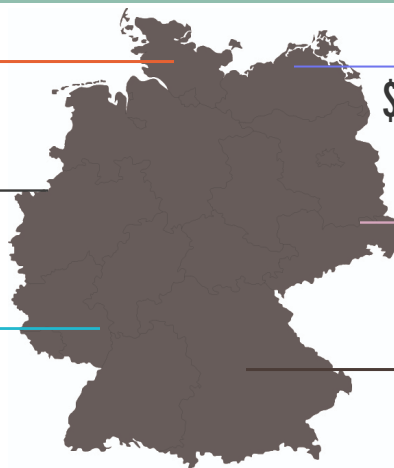
INFLATION RATE:
1.7%

EXCHANGE RATES (EUR PER USD):
0.89

GROSS DOMESTIC PRODUCT (GDP):
\$4.2 trillion (2.5% annual growth rate)

EXPORTS:
\$1.4 trillion

UNEMPLOYMENT RATE:
3.8%



Source:
The World Factbook, reporting 2017/2018 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

86% Yes

51% Internet Booking Service*

27% The Lodging Establishment Directly

23% Travel Agency/Tour Operator/Travel Club

8% Other

14% No

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



How Air Reservations were Booked

36% Directly with Airline

33% Travel Agency/Tour Operator/Travel Club

27% Internet Booking Service*

7% Corporate Travel Department

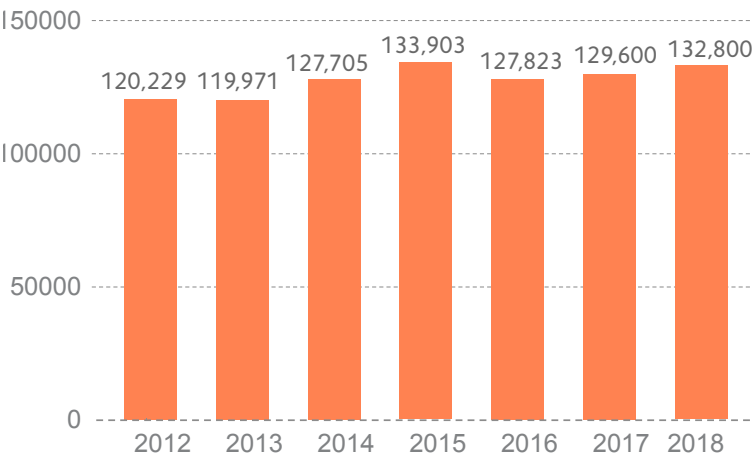
* assume "Internet Booking Service" is an Online Travel Agency (OTA).

Source:
Brand USA, reporting 2017 intercontinental traveler data
U.S. Dept. of Commerce - NTTO, reporting 2017-18 data

GERMAN VISITATION TO ARIZONA



Visitation Volume to Arizona



Visitor Characteristics

41 years Average Age

\$76,071 Average Household Income

2.0 persons Average Party Size



Length of Stay

4.9 Average Nights per Destination

20.2 Average Nights in U.S.



Port of Entry

35% Los Angeles, CA

16% San Francisco, CA

10% Las Vegas, NV

6% Chicago, IL

6% Denver, CO



Main Purpose of Trip

94% Leisure

83% Vacation Holiday

10% Visit Friends/Relatives

1% Education

6% Business

3% General Business

3% Convention/Conference/Trade Show

* includes trips with multiple purposes



Transportation in U.S.

74% Rented Auto

32% Air Travel between U.S. Cities

30% City Subway/Tram/Bus

24% Auto, Private or Company

15% Taxicab/Limousine



Visa Credit Card Travel Spending

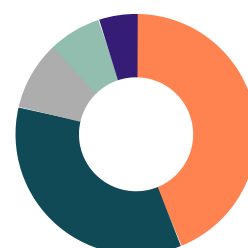
German Visa Card Spending ranked #6 in 2018 with 3% of total International Travel Spending in Arizona.

By Quarter



Q1: 15%
Q2: 29%
Q3: 36%
Q4: 20%

By Arizona Region



Northern: 42%
Phoenix & Central: 35%
West Coast: 10%
Tucson & Southern: 9%
North Central: 5%



Accommodations*

76% Hotel/Motel

14% Private Home

13% Other

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

Source:

Tourism Economics, reporting 2012-2018 data

VisaVUE Travel, reporting 2018 data

U.S. Dept. of Commerce - NTTO, reporting 2017-18 aggregate data