

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:
80.15 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, July 2020 population estimate

TRAVEL MOTIVATION AND PLANNING



Top Travel Motivators

36% Dining/Gastronomy

34% Cultural historic attractions

34% Ecotourism/nature



Source used in Destination selection for last intercontinental trip

54% Websites via computer

37% Recommendation from family & friends

27% Information in printed travel guidebooks

21% Advice from travel professionals/travel agents



Advance Decision Time

18% Less than a month

15% 1 to 2 months

34% 3 to 5 months

22% 6 to 12 months

7% More than 1 year



Lodging Reservation made before leaving home

78% Yes

46% Internet Booking Service*

20% The Lodging Establishment Directly

19% Travel Agency/Tour Operator/Travel Club

15% Other

22% No

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



How Air Reservations were Booked

42% Directly with Airline

32% Travel Agency/Tour Operator/Travel Club

21% Internet Booking Service*

7% Corporate Travel Department

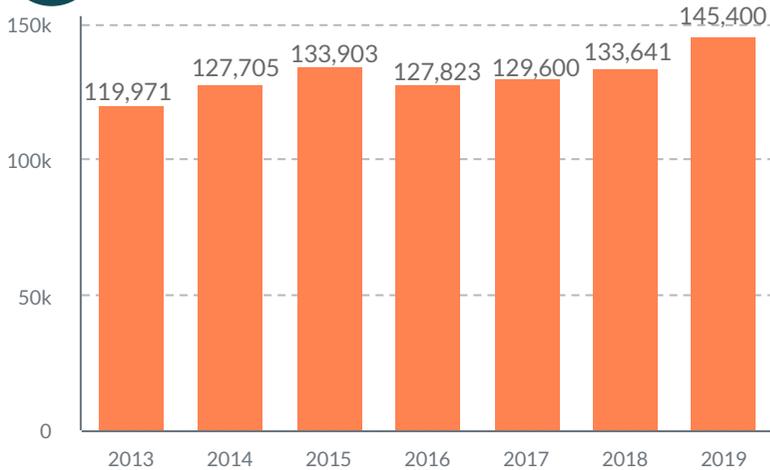
* assume "Internet Booking Service" is an Online Travel Agency (OTA).

Source: Brand USA, reporting 2019 intercontinental traveler data
U.S. Dept. of Commerce - NTTO, reporting 2017-19 data

GERMAN VISITATION TO ARIZONA



Visitation Volume to Arizona



Visitor Characteristics

41 years Average Age

\$79,096 Average Household Income

2.1 persons Average Party Size



Length of Stay

4.2 Average Nights per Destination

19.5 Average Nights in U.S.



Port of Entry

29% Los Angeles, CA

22% San Francisco, CA

9% Las Vegas, NV

4% Denver, CO

4% New York, NY



Main Purpose of Trip

94% Leisure

81% Vacation Holiday

12% Visit Friends/Relatives

2% Education

6% Business

4% General Business

2% Convention/Conference/Trade Show

* includes trips with multiple purposes



Transportation in U.S.

76% Rented Auto

30% Air Travel between U.S. Cities

27% City Subway/Tram/Bus

27% Auto, Private or Company

20% Ride-sharing Service



Visa Credit Card Travel Spending

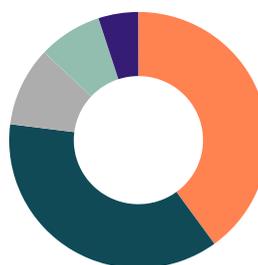
German Visa Card Spending ranked #5 in 2019 with 3% of total International Travel Spending in Arizona.

By Quarter



Q1: 13%
Q2: 30%
Q3: 38%
Q4: 20%

By Arizona Region



Northern: 40%
Phoenix & Central: 37%
West Coast: 10%
Tucson & Southern: 8%
North Central: 5%



Accommodations*

71% 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 2013-2019 data
VisaVUE Travel, reporting 2019 data
U.S. Dept. of Commerce - NTTO, reporting 2017-19 aggregate data