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**

<table>
<thead>
<tr>
<th>Population:</th>
<th>80.15 million</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inflation Rate:</td>
<td>1.7%</td>
</tr>
<tr>
<td>Exchange Rates (EUR per USD):</td>
<td>0.89</td>
</tr>
</tbody>
</table>


**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.

**Advance Decision Time**

- **18%** Less than a month
- **15%** 1 to 2 months
- **36%** 3 to 12 months
- **22%** 6 to 12 months
- **7%** More than 1 year

Source: Compiled by the Arizona Office of Tourism Research Division

**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 International Traveler data

**Exports:** $4.2 trillion (2.5% annual growth rate)

**Unemployment Rate:** 3.8%
**Visitor Characteristics**

- **Average Age**: 41 years
- **Average Household Income**: $79,096
- **Average Party Size**: 2.1 persons
- **Average Nights by Destination**: 4.2
- **Average Nights in U.S.**: 19.5

**Visit Arizona Volume**

- **2013**: 1,269,972
- **2014**: 1,277,705
- **2015**: 1,230,082
- **2016**: 1,273,430
- **2017**: 1,264,840
- **2018**: 1,455,400

**Visitation Volume to Arizona**

<table>
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**Transportation in U.S.**

- **76%**: Rented Auto
- **30%**: Air Travel between U.S. Cities
- **27%**: City Subway/Train/Bus
- **27%**: Auto, Private or Company
- **20%**: Ride-sharing Service

**Accommodation**

- **71%**: Hotel/Motel
- **17%**: Private Home
- **17%**: Other

**Main Purpose of Trip**

- **94%**: Leisure
- **81%**: Vacation Holiday
- **12%**: Visit Friends/Relatives
- **2%**: Education
- **6%**: Business
- **4%**: Convention/Conference/Trade Show

**Visa Credit Card Travel Spending**

German Visa Spending ranked #5 in 2019 with 2% 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%

**Source**

- Tourism Economics, reporting 2013-2017 data
- Visitor Spending, reporting 2013 data
- U.S. Dept. of Commerce NTTO, reporting 2017-19 aggregate data

*Internet Booking Service* includes trips with multiple purposes.

*Assume “Internet Booking Service” is an Online Travel Agency (OTA).