Market update for Germany

• Overnight visitors from Germany in 2019: 145,400 ↑
• Overnight visitors from Germany in 2020: 16,000 ↓ due to Covid-19 pandemic

• Spending from German visitors in 2019: $206 million ↑
• Spending from German visitors in 2020: $18 million ↓ due to Covid-19 pandemic

But there is a continuously growing demand from German travelers reported by all industry partners (see market outlook for Germany)

Source: Tourism Economics, Longwoods International, Dean Runyan Associates; Tourism Economics
Destination trainings/webinars in 2020

- Promotion of German Arizona online training program: **65 travel agents** completed all modules
- Customized webinars for various German-speaking tour operators specialized in USA
- based on individual Arizona knowledge level and interest/requirements of their clients
  - 7 different customized trainings created exclusively for each tour operator
  - 22 agents trained (ranging from Sales Agent to Product Manager and Managing Director)
Destination trainings/webinars in 2020

- In November 2020 together with Cruise America: “Red Rocks & Canyons in Arizona” itinerary

  **81 agents trained live + 58 additional views** on AOT Germany YouTube channel
Destination trainings/webinars in 2021

• In May “Touring tribal lands in Arizona” webinar with Antelope Canyon Tours
  • 64 agents trained live + 38 views on YouTube

• Joint webinars with CTO & UOT promoting the new multistate itineraries
  • In January “National Parks & Monuments”: 93 agents trained live + 178 views on YouTube
  • In February “Dark Skies”: 104 agents trained live + 93 views on YouTube
  • In March “Scenic Byways & Highways”: 73 agents trained live + 37 views on YouTube

➔ TOTAL: 270 agents trained live & 308 agents watched the recordings
Tour operator promotion with ARGUS Reisen

- Online advent calendar with Arizona as “Destination of the Day” on December 17th 2020 → In total 12,500 participants
Tour operator promotion with USA-Reisen.de

- Joint consumer newsletter with Cruise America & Stellar Adventures in April 2021
  - Opening rate: **12,600 subscribers**
  - Resulting number of views for Rediscover AZ video: **705 views**
Multistate webinar with tour operator CANUSA

- Together with tour operator CANUSA Touristik, Colorado Tourism Office and Utah Office of Tourism
- April 22nd 2021 → **240 consumers** attended live for 90 minutes + **921 views** on YouTube
- CANUSA promoted the “National Parks & Monuments” webinar on their social media channels
Multistate promotion with tour operator USA-Reisen.de

- “National Parks & Monuments” itinerary promoted in newsletter to 60,000 subscribers in May 2021
- Podcast promoting “Dark Skies” itinerary (2 hours and 45 minutes) on tour operator website in June 2021
- Joint consumer webinar presenting “Scenic Byways & Highways” itinerary on June 10th 2021
  → **153 consumers** attended live for approx. 2 hours + **102 additional clients** requested the recording
Stand at virtual trade event in February 2021

- FVW Counter Days (February 11th & 12th) organized by largest German trade media FVW/Travel Talk
- Participation with a virtual stand → **142 live conversations** via chat & video call function
- Interview (5 minutes) streamed live on TV channel accessible to all 2,300 attendees
Virtual ITB Berlin NOW – March 9th – 12th 2021

• Participation with a virtual stand ("Brand Card") on new ITB NOW platform
• 18 virtual meetings carried out as video calls with German-speaking trade partners
• ITB booklet transferred into Google document to share notes with AOT immediately
Stand at virtual RV trade show in March 2021

- WOMOFAIR carried out on March 23rd by German tour operator WOMOFOX specialized on RV rental
- Participation with a virtual stand (40 visitors) & 20 minutes live presentation (24 participants)
Trade newsletter for German-speaking markets

- Monthly newsletter from July 2020 until June 2021
- Top 4 themes based on opening rate in chronological order:
  - October 2020: Luxury experiences in Arizona -> opening rate 44.8%
  - November 2020: Arizona road trips with unique attractions -> opening rate 46%
Trade newsletter for German-speaking markets

- January 2021: Cowboy for a day or two in Arizona -> opening rate 51%
- February 2021: Wild flowers and birding in Arizona -> opening rate 45.3%
Visit USA Germany activities – trade newsletters

- November 26th 2020 “Thanksgiving & Christmas traditions” with Arizona recipe → 22,600 travel agents
- May 4th 2021 “USA insider tips” with Arizona as ideal road trip destination → 23,000 travel agents
- May 31st 2021 “Trade news” promoting prize draw of Arizona online training → 23,000 travel agents
- June 30th 2021 “Must sees in USA” with Arizona bucket list places and options → 23,200 travel agents
Additional Visit USA Germany activities in 2021

• Participation in virtual USA roadshow on June 9th with 20 minutes live presentation “Arizona’s State Parks, National Parks & Monuments” → **83 agents** trained live + 50 views on YouTube

• Travel agent calendar as interactive destination training with Arizona “Memory game” published in June → **96 travel agents participated** & **52 of the agents subscribed** to the German Arizona trade newsletter
Additional TMR Services throughout the year

- Continuous communication with trade partners (especially during pandemic)
- Constant market analysis and sharing any relevant industry news with AOT
- Inclusion of German Arizona online training program in each trade webinar and newsletter

Prize draw in June 2021 with Maverick Helicopter’s providing grand prize

Alle Expedienten, die alle fünf Module bis Ende Juni erfolgreich absolvieren, nehmen an einer Verlosung teil. Als Hauptpreis gibt es einen Gutschein für eine "Canyon Spirit Tour" für zwei Personen, um den Grand Canyon mit Maverick Helicopters zu erleben.

Oder Sie können einen Wunschgutschein gewinnen. Sehen Sie sich hier ein Video der Canyon Spirit Tour an!

GEWINNEN SIE! Gutschein für eine "Canyon Spirit Tour" für zwei Personen, um den Grand Canyon mit Maverick Helicopters zu erleben oder einen Wunschgutschein.

Ende des Gewinnspiels: 30. Juni 2021
Additional TMR Services throughout the year

- Creation of regular detailed Covid-19 updates for German-speaking markets (total of 40 in FY21)
- Providing German Arizona trade resources to partners (sales sheet, itineraries, newsletter)
- Fulfilment of German brochure requests
- Providing feedback and checking TalkWalker reports for Germany
# Summary of KPIs for FY21

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* including Arizona online training program
* including Go West Summit, FVW Counter Days, ITB Berlin NOW, Brand USA’s Global Marketplace and WOMOFAIR

- Quantity of Arizona webinars (including customized trainings): 16
- Number of agents trained live in webinars: 622
- Promotion of AOT Germany YouTube channel with recordings: 493 views (in total)
- Virtual trade shows with German-speaking appointments: 5
- Monthly Arizona trade newsletter with growing trade database
- Inclusion of Arizona online training program in all webinars
Mr. Oliver Feess, Senior Manager Network Planning Condor:

We have decided to cancel the remaining summer 2021 flights to Phoenix (and other US destinations) in June as we were still awaiting positive messages from the governments to allow non-essential traffic between the US and Germany.

So we would focus on summer 2022 now, which has been put on sale mid-June 2021. Our schedule includes 3 weekly flights from Frankfurt (FRA) to Phoenix (PHX) starting May 23rd 2022 until September 29th 2022.
Ms. Caroline Behrends, Senior Product Manager North America TUI Germany:

"TUI, TUI Camper and airtours customers want to travel to the U.S. again, increasing bookings and inquiries in our travel agencies and on our websites confirm this trend.

The U.S. is one of the most popular destinations for repeaters and has been TUI's summer bestseller among long-haul destinations for years. Together with our local partners, we are well prepared for a restart. A large part of our program in North America can already be booked for 2022, with attractive early-booking discounts, because our guests plan and book more extensive trips early."
Mr. Kolja Kassner, Chief Business Development Officer CANUSA Touristik:

Since May demand in the German-speaking market has risen steadily. With the help of our marketing activities, we are now generating a similar number of offers to the same period two years ago. This is extremely pleasing, especially as it is unfortunately still not possible to predict with certainty when we Europeans will be allowed to enter the USA again.

About half of the interested parties would like to book before the end of this year and therefore believe that the borders will be opened soon. At the same time, with the other half, we have more early bookers for next year than ever before at this time. The desire to travel is greater than ever before, and we are doing everything we can to fulfill this desire to travel with dream trips to North America.
Ms. Pia Hambrock, Head of Product & Operations CRD Touristik:

With the great vaccination campaign that the US rolled out requests are steadily increasing since April and bookings are coming in for this and also already for next year. We are still keeping our fingers crossed for borders to reopen in late summer or during the fall. CRD has a huge backlog of finalized itineraries that are ready to book as soon as borders do open.

We are convinced that with its wide open spaces and big places it can be a great US year next year. So let’s work together on attracting customers and building confidence!
Mr. Axel Mosel, Head of Sales USA-Reisen.de (Flamingo Fernreisen Company):

The demand for USA remains high and we receive corresponding inquiries from customers every day, even for this year’s summer season. The majority are bookings for departures in the 2022 summer season, which are mostly RV trips between May and October. And usually not rebookings, but actual new US bookings.

The many reactions and the generally enthusiastic feedback on our various marketing campaigns during the pandemic confirm the clients interest, desire and willingness to travel. What becomes clear in any case: Our customers would accept restrictions and stricter rules for traveling, as long as they are finally allowed to travel again to the USA.
Thank You

Nina Meuter, Account Manager
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