Tourism Market Overview
Germany, Austria & Switzerland
FY 2021/2022
Kaus Media Services
Germany is Europe’s most populous nation as well as a leading player in the continent’s economic, security and political welfare.

Holidays abroad are considered as an important leisure pursuit by Germans, that they are willing to pursue even during harder economical times. Though Germany has a strong economy, Covid and the current Ukraine crisis had effects on the financial situation.

The German outbound market is one of the largest and most developed in the world. The high standard of living and the stable economy means that many citizens can normally bring travel aspirations to reality. Since the travel restrictions to many international destinations have been eased, we see a very high travel demand to intercontinental destinations. It is safe to say that many Germans want to make up for all of the travel experiences they missed during the global pandemic and the associated travel restrictions.
Germans are eager to travel again

In 2021 already, it was evident that Germans wanted to travel again. Due to the global travel restrictions, most of the leisure travel concentrated on Southern Europe, especially the Mediterranean area as well as on domestic destinations.

However, as soon as the respective travel restrictions got eased, Germans immediately started to plan travels to intercontinental destinations again. Especially the U.S. are very popular among German travelers. Many airlines report, that flight to their U.S. destinations are fully booked during the summer season as passengers are even booking very expensive flight tickets.

The forecast for the following months is very promising as well. What changed though, is the booking timeframe. While travelers booked their trips more than three months in advance in 2019, 28% of the travelers now book their flights within three to five months upfront and 22% only within four weeks ahead of the trip.
Demographic Facts & Statistics

- Population: 84.3 million inhabitants (approx. 101.0 million incl. Austria & Switzerland)

- Labor Force: 45.2 million

- Unemployment Rate: 4.9%
Demographic Facts & Statistics

Roughly 45.2 million people in Germany (national concept) were in employment in March 2022 according to provisional calculations of the Federal Statistical Office (Destatis). Employment thus exceeded the pre-crisis level of February 2020 for the first time. Compared with March 2021, the number of persons in employment was up by 1.6%, or +725,000, in March 2022. This was the eleventh consecutive month since May 2021 for which a larger absolute year-on-year increase was recorded. In February 2021, however, the year-on-year change rate had been -1.6%. According to calculations based on the labour force survey, 1.26 million people were unemployed in March 2022. That was a decline of 435,000 (25.7%) compared with March 2021. The unemployment rate was 2.9% (March 2021: 4.0%).

The gross domestic product (GDP) rose by 0.2% in the first quarter of 2022 on the fourth quarter of 2021 after adjustment for price, seasonal and calendar variations. Economic performance thus increased slightly in the first quarter of 2022, following the recovery of the German economy last summer and the decline at the end of 2021. This was mainly due to higher capital formation, whereas the balance of exports and imports had a downward effect on economic growth. The economic consequences of the war in Ukraine have had a growing impact on the short-term economic development since late February.
Travel Market

Overview of the German travel market

• In 2021, Germans did 55.1 Million leisure trips. 35% of these have been booked via tour operators or travel agencies.
• There have been 47.8 million travelers who did a trip of a duration of at least five days.
• Germany counts 2,300 tour operators which recorded a revenue of 10.7 billion euros.
• In total, Germans spent 31.1 billion euros in 2021.
• The average trip duration was 12.2 days.
• 63.4% of all trips in 2021 were international trips. The Mediterranean region was the most popular one (35.4%) for German travelers.
Travel Market

Why are German Travelers important to Arizona?

• Germany is the largest overseas source market.
• Germans like the climate in the summertime.
• Germans are keen to visit the US again.
• German guests spent 19.5 nights in the U.S. while on vacation and 4.2 nights in Arizona.
• In 2019, 145,400 German travelers visited Arizona.
• In 2019, German visitors spent 206 Million USD while visiting Arizona
• 94% of the German visitors visit Arizona for leisure.
Travel Market

Top Methods of Sharing Travel Experiences:
- Bring back gifts for friends or relatives purchased in the USA – 46.3%
- Send postcards or letters from the United States – 35.3%
- Post pictures or videos on social media – 30.3%
- Show off products purchased in the USA – 29.6%

Deterrents to Visiting U.S.:
- USA is too expensive – 45.4%
- The United States is too far away – 30.3%
- Uncomfortable with US national politics – 27.7%
- Better destinations exist – 19.3%
- Concerns about my personal safety in the United States – 18.2%

Most Important Content to the Destination Decision:
- National Parks - 40.7%
- Ways to experience nature - 39.0%
- Hotels and lodging - 35.1%
- Important iconic attractions - 34.7%
PR Achievements & Accomplishments
FY 2021/2022
PR-Activities

General Public Relations Activities

- KMS developed and executed inspirational public relations activities, which generated media placements in Germany, Austria & Switzerland while leisure trips to the U.S. were possible.
- KMS developed public relations activities, which supported the recovery marketing of the AOT after the travel restrictions to the U.S. were lifted in November 2021.
- KMS was in continuous contact with media professionals in order to pitch inspirational story ideas about Arizona.
- KMS arranged a video spot in the McDonald’s travel tv broadcast which was without any costs for the AOT. The video clip reached 35 million consumer contacts.
PR Activities

General Public Relations Activities

• Proactive media calls and pitches
• Development of inspirational and creative story angles in order to create media coverage, despite the COVID situation
• Reactive media assistance and support
• Maintenance of the AOT’s German social media page
• Monthly result and media monitoring
• Monthly media coverage evaluation and documentation
• Monthly activity report
PR Activities

TravMedia’s International Media Marketplace (IMM) Germany 2022

TravMedia’s IMM Germany 2022 was the first in-person media networking event in the German tourism media industry since March 2020. Despite the fact the ITB Berlin 2022 was cancelled, TravMedia’s IMM took place and reunited the industry.

Prior to the one-day event KMS arranged 21 meetings with top-tier media professionals. KMS represented the AOT and discussed story ideas as well as potential fam trip opportunities.
This year, the AOT returned to the German market in order to reconnect with top-tier media professionals by doing a designated media mission in Hamburg and Munich. KMS contacted target media publications and arranged high-level appointments in both cities.

Together with Visit Tucson and Experience Scottsdale, KMS pitched new tourism developments, story ideas and press trip opportunities to leading print and online media professionals.
PR Activities

AOT Media Networking Event Austria 2022

Parallel to the AOT Media Mission Germany 2022, the AOT was present in the Austrian market. KMS organized an exclusive media networking event in Vienna and invited various target media professionals.

During the event, we reconnected with the attending journalists, have them individual destination overviews, informed them about the latest developments and discussed press trip opportunities. Nearly 20 top-tier media professionals attended the event.
PR Activities

Fam Trips

In order to generate a maximum media coverage after the lift of the U.S. travel ban in November 2021, KMS organized various fam trips and secured top-tier media professionals.

In conclusion, KMS organized four individual media visits and a media group fam trip with five attendees and a KMS PR escort between November 2021 and June 2022. Participating media outlets included but were not limited to daily newspapers such as KURIER, Saechsische Zeitung as well as travel magazines such as AMERICA Journal, Cabrio Life, Prestige Travel and 360° USA.
PR Activities

Media Releases

KMS distributed two monthly Arizona press releases or newsletters to a high number of travel media professionals in Germany, Austria & Switzerland.

Furthermore, KMS featured Arizona in 21 themed agency press releases to increase visibility for Arizona in the German speaking countries.
Total Fiscal Year 2021/22

In conclusion, KMS generated a total of 336 media placements for Arizona:

• 164 print articles
• 189 online articles
• 1 broadcast
• Total circulation / visitation of 262,765,241
• Total media value of US$ 15,090,565
Thank you!

Please send us all your media information, press kits, newsletters and story ideas so we can promote your region, hotel or services:

teamarizona@kaus.eu