

Global Market Profile

GERMANY



October 2024

Introduction

- Tourism Economics forecasts that domestic leisure visitation will account for \$101B in spending in California in 2024 and international visitation will account for \$28B.
- The **Global Market Profile** reports were developed by Visit California Research to provide the organization and the state's tourism industry with insights on California's domestic market and thirteen opportunity international markets through detailed market landscapes as well as highly targeted audience profiles and traveler behavior insights.

Market Landscape:



Audience Insights:



California Traveler & Trip Details:

- **Market Landscape** includes foundational intelligence from Visit California:
 - Visitation and Spending Forecasts
 - Airlift Recovery (flights and seats)
 - Arrival Numbers & California Market Share
 - Consumer travel intent and barriers
- **Audience Insights** includes a profile of target travelers, including:
 - Description and size of Audience Target
 - Demographic profile
 - General travel planning behavior
 - General trip spending
 - Advertising and sports preferences
- **California Traveler & Trip Details** includes details about visitors to California from the past year, including:
 - Trip purpose
 - First/Repeat visitation
 - Destinations visited
 - Travel party, accommodations, activities and expenditures

Methodology & Sources

- The report contains three sections:
 - The **Market Landscape** section is sourced from Visit California's key research partners, including Tourism Economics, NTTO, CIC Research, Cirium and YouGov.
 - The **Audience Insights** section is sourced from YouGov's Global Travel Profiles which tracks travel-related sentiment and behavior in over 25 global markets, including all thirteen Visit California opportunity markets. Panelists are surveyed on preferred trip types, booking methods, accommodation preferences, and advertising perceptions.
 - The audience profile is built on a segmentation of consumers planning international leisure travel in the next 12 months and are considering California as a destination.* The profiles provide insights into those travelers most likely to visit the state.
 - The **California Traveler and Trip Characteristic** section provides information on trips that included a stay in California from the Survey of International Air Travelers (SIAT).



Market Landscape

Country Profile

Germany



POPULATION: *

84.6M

EXCHANGE RATE: **

Local currency to USD dollar

0.9

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

0.2%

INFLATION RATE:

Annual % chg ****

2.4%

* www.worldometers.info, 2024

** www.x-rates.com, Aug 2024

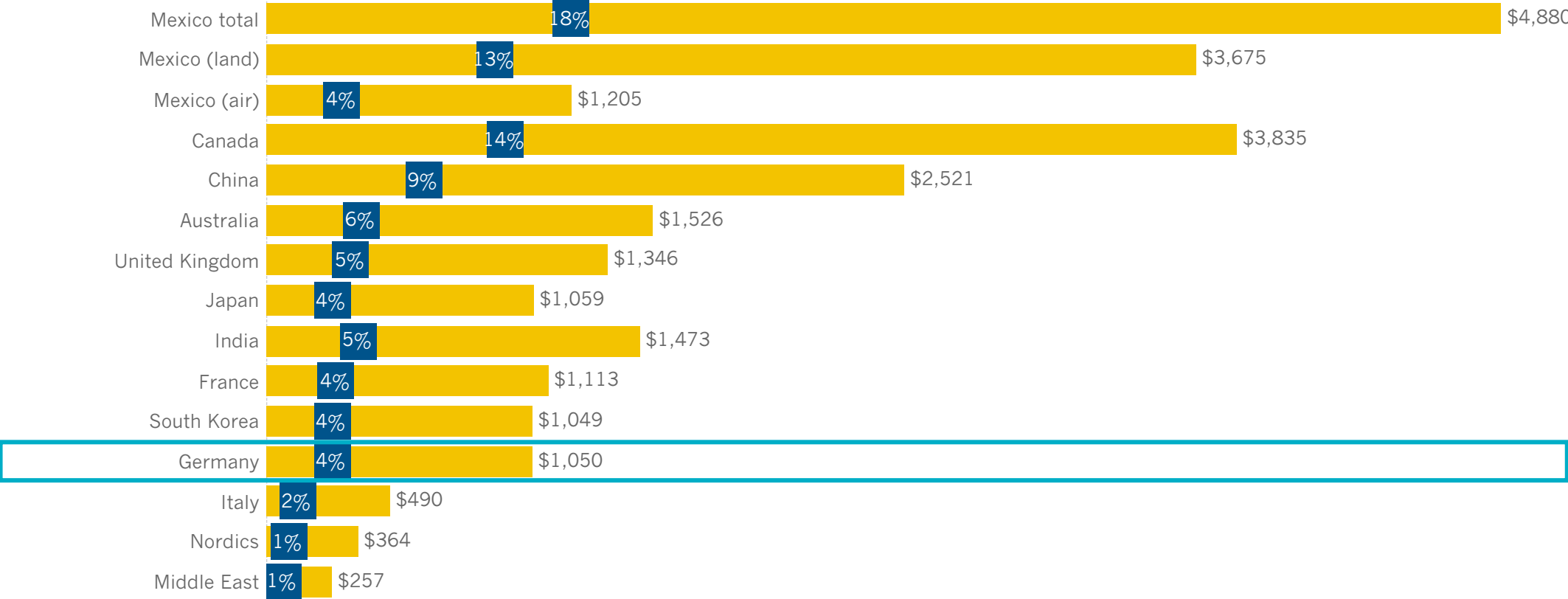
*** www.imf.org, 2024

**** www.imf.org, 2024

Forecast: Visitor Spending by Market (2024)

The chart below shows California's visitor spending forecast for the state's 13 target markets and share of total international spending in the state.

2024 Spend Forecast



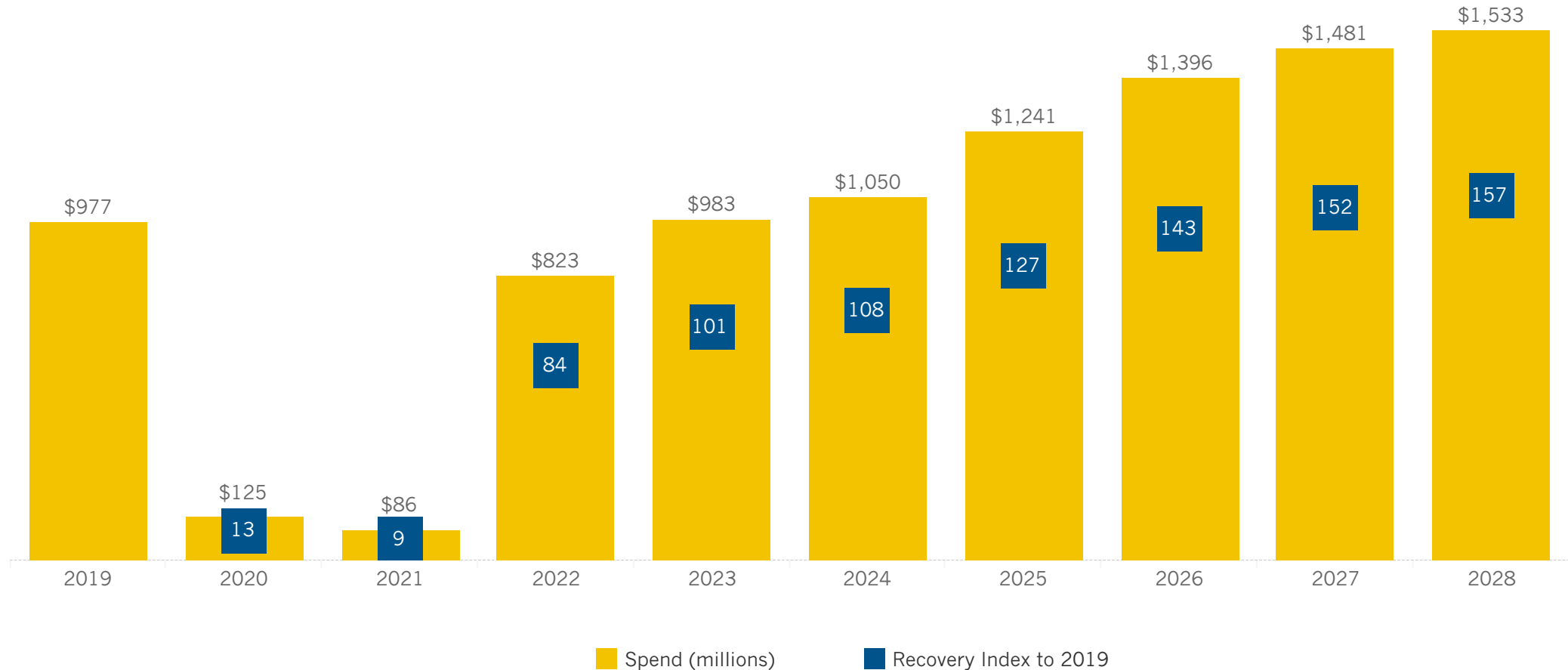
■ Spend (millions) ■ Share of Total Int'l Spend

Source: Tourism Economics (October 2024)

Forecast: Visitor Spending

The chart below shows the state's visitor spending forecast and the recovery index for the focus market.

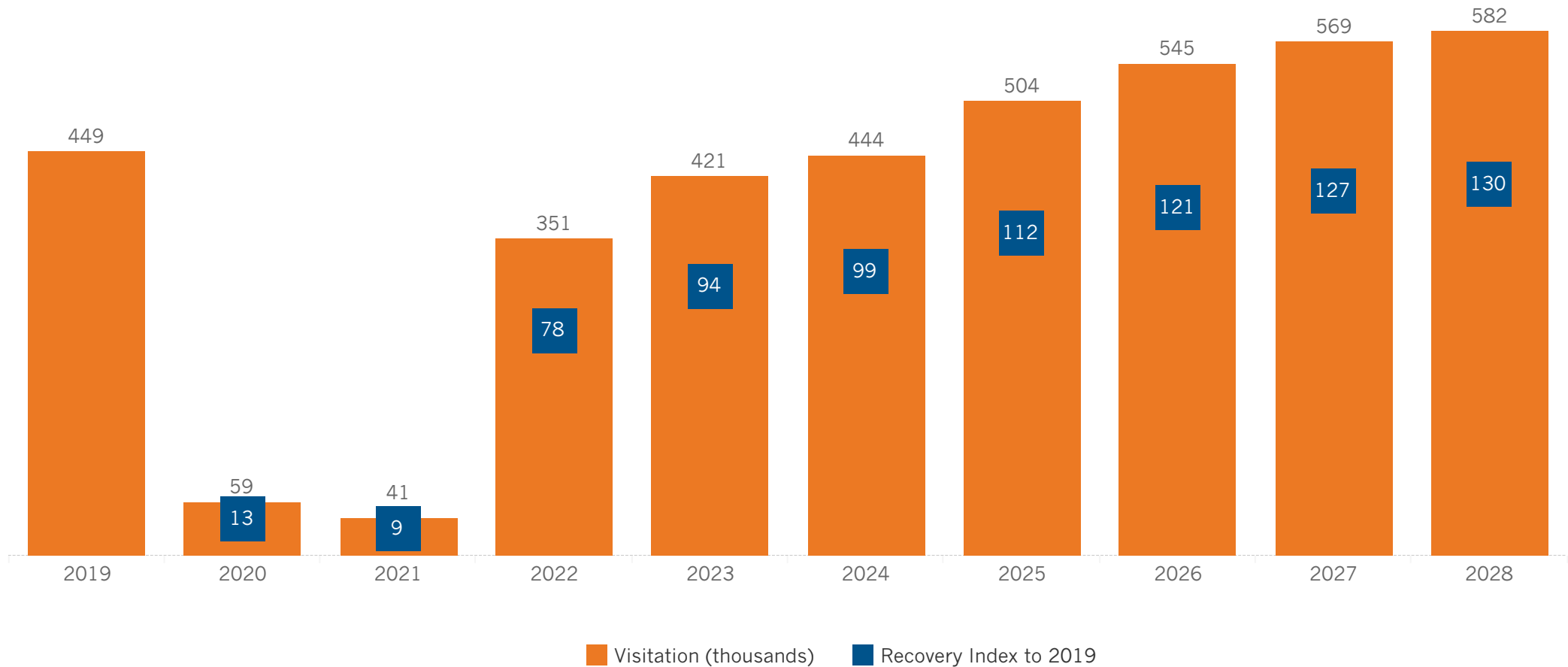
Germany: Spend Forecast with Recovery Index to 2019



Forecast: Visitor Volume

The chart below shows the state's visitation forecast and recovery index for the focus market.

Germany: Visitation Forecast with Recovery Index to 2019



International Visitor Spending by Region

The table below shows the distribution of international visitor spending by California tourism region in total and for the focus market .

Region	Total International Visitor Spend (2023)		Germany Visitor Spend* (2023)		
	Spending (\$B)	%	Spending (\$B)	%	Index
Central Coast	\$0.828	3.7%	\$0.084	8.5%	232
Central Valley	\$0.278	1.2%	\$0.021	2.1%	174
Deserts	\$0.861	3.8%	\$0.025	2.6%	67
Gold Country	\$0.168	0.7%	\$0.008	0.9%	115
High Sierra	\$0.238	1.1%	\$0.030	3.1%	289
Inland Empire	\$0.308	1.4%	\$0.006	0.7%	48
Los Angeles	\$8.113	36.0%	\$0.292	29.7%	82
North Coast	\$0.037	0.2%	\$0.005	0.6%	336
Orange County	\$2.219	9.8%	\$0.036	3.6%	37
San Diego	\$3.062	13.6%	\$0.105	10.6%	78
San Francisco Bay Area	\$6.407	28.4%	\$0.369	37.5%	132
Shasta Cascade	\$0.030	0.1%	\$0.002	0.2%	175
Total California	\$22.549	100%	\$0.983	100%	

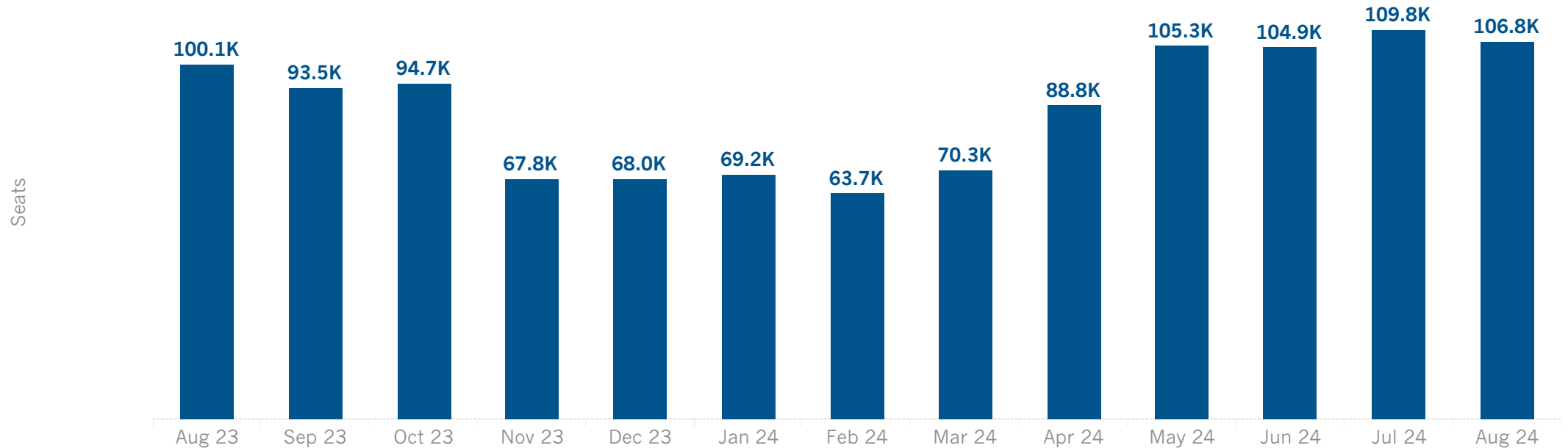
*Regional visitor spending for the focus market is estimated using a Visit California proprietary model that adjusts statewide visitor spending estimates for the focus market to the region-level using Visa Destination Insights credit card data. The index shown compares the regional share of spending from the focus market to the share of total international spending in the region.

Source: Tourism Economics/Visa Destination Insights/Visit California Research (June 2024)

Airlift to California

The charts below shows airlift to California for the focus market.

Germany: Non-Stop Seats

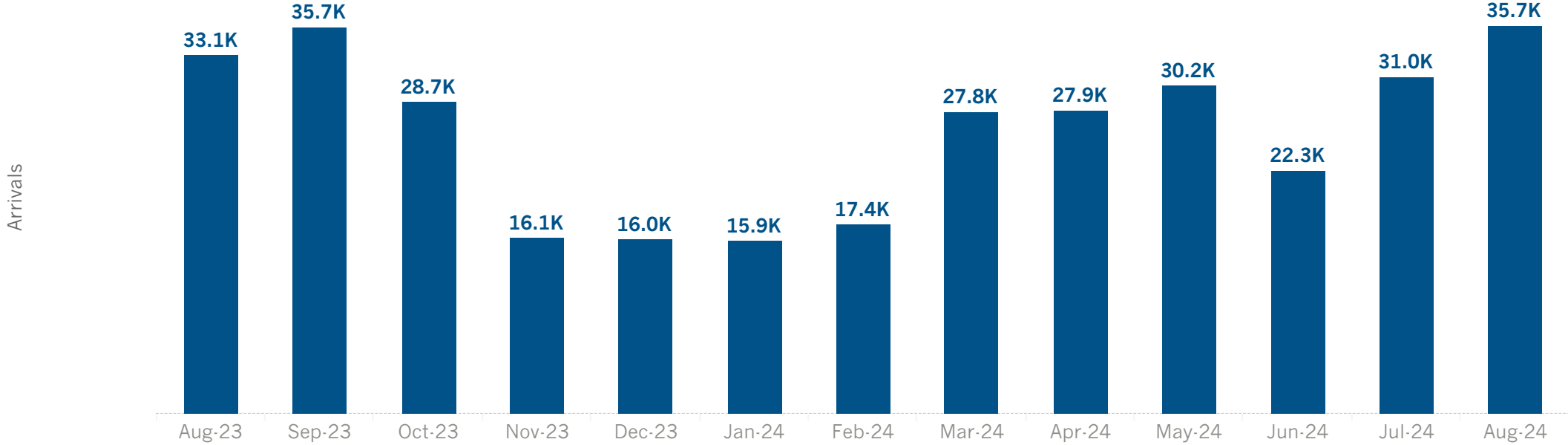


YoY % Chg	4%	-2%	5%	-4%	-10%	-3%	-1%	-8%	21%	18%	19%	12%	7%
% Chg vs 2019	4%	0%	1%	-10%	-9%	-3%	4%	-4%	9%	10%	12%	14%	10%

Non-Resident Arrivals to California

The chart below shows non-resident arrivals at California’s ports of entry for the focus market.

Germany: Non-Resident Arrivals at Ports of Entry



YoY % chg	10%	22%	11%	3%	9%	11%	-1%	14%	16%	13%	7%	16%	8%
% chg vs 2019	-10%	-14%	-22%	-21%	-19%	-13%	-18%	3%	-15%	-15%	-19%	-5%	-3%

California's Int'l Market Share (Visits)

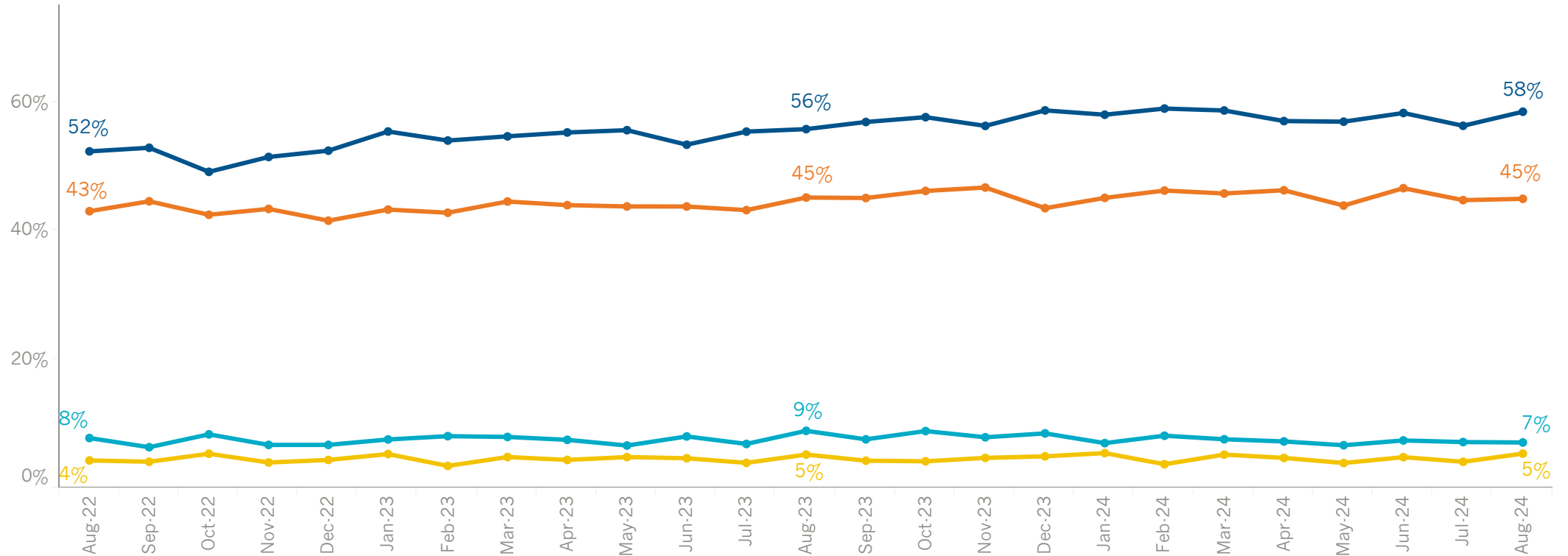
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	22.2%	21.9%	22.6%	23.3%	22.7%	22.8%	22.0%	19.5%	23.3%	23.1%	22.5%
Mexico	51.3%	44.6%	42.4%	41.7%	43.0%	43.2%	41.9%	29.5%	35.8%	47.9%	48.0%
China	46.3%	46.1%	41.4%	42.9%	36.5%	38.1%	36.5%	38.9%	37.0%	41.8%	45.6%
Australia	48.2%	49.2%	49.4%	49.3%	46.2%	44.6%	45.3%	41.2%	40.0%	39.4%	43.1%
India	26.9%	25.1%	28.2%	25.8%	25.8%	30.0%	28.5%	26.8%	19.2%	25.7%	27.2%
France	27.7%	27.4%	26.6%	28.0%	26.0%	26.8%	24.8%	21.2%	22.5%	27.0%	25.9%
South Korea	29.2%	26.2%	24.8%	25.1%	23.9%	24.3%	21.1%	21.4%	27.1%	23.8%	24.5%
Germany	21.8%	22.5%	21.8%	22.1%	23.4%	23.8%	21.8%	20.1%	16.5%	23.7%	22.9%
Japan	13.6%	14.8%	15.7%	15.2%	14.7%	15.7%	14.9%	14.9%	24.7%	21.6%	22.7%
Italy	16.7%	18.7%	21.4%	22.0%	19.2%	21.8%	18.8%	14.2%	15.5%	20.6%	17.9%
Nordics	20.1%	19.6%	22.7%	20.7%	24.8%	22.9%	20.7%	23.8%	20.3%	26.4%	17.4%
United Kingdom	17.3%	15.7%	16.6%	17.4%	16.3%	17.4%	15.8%	16.6%	18.4%	17.0%	16.1%
Middle East	11.7%	13.7%	13.5%	15.5%	11.5%	11.3%	9.8%	4.8%	10.7%	10.2%	9.2%
Canada	6.7%	7.1%	7.6%	8.0%	8.1%	8.0%	8.4%	8.3%	12.3%	9.1%	8.6%
Brazil	8.7%	9.4%	9.1%	9.9%	10.8%	8.6%	9.2%	8.3%	7.9%	8.7%	8.0%

Travel Planned in Next 12 Months

The chart below shows the types of trips planned in the next 12 months for the focus market.

Germany: Planning to Travel in the Next 12 Months (% of pop age 16+)

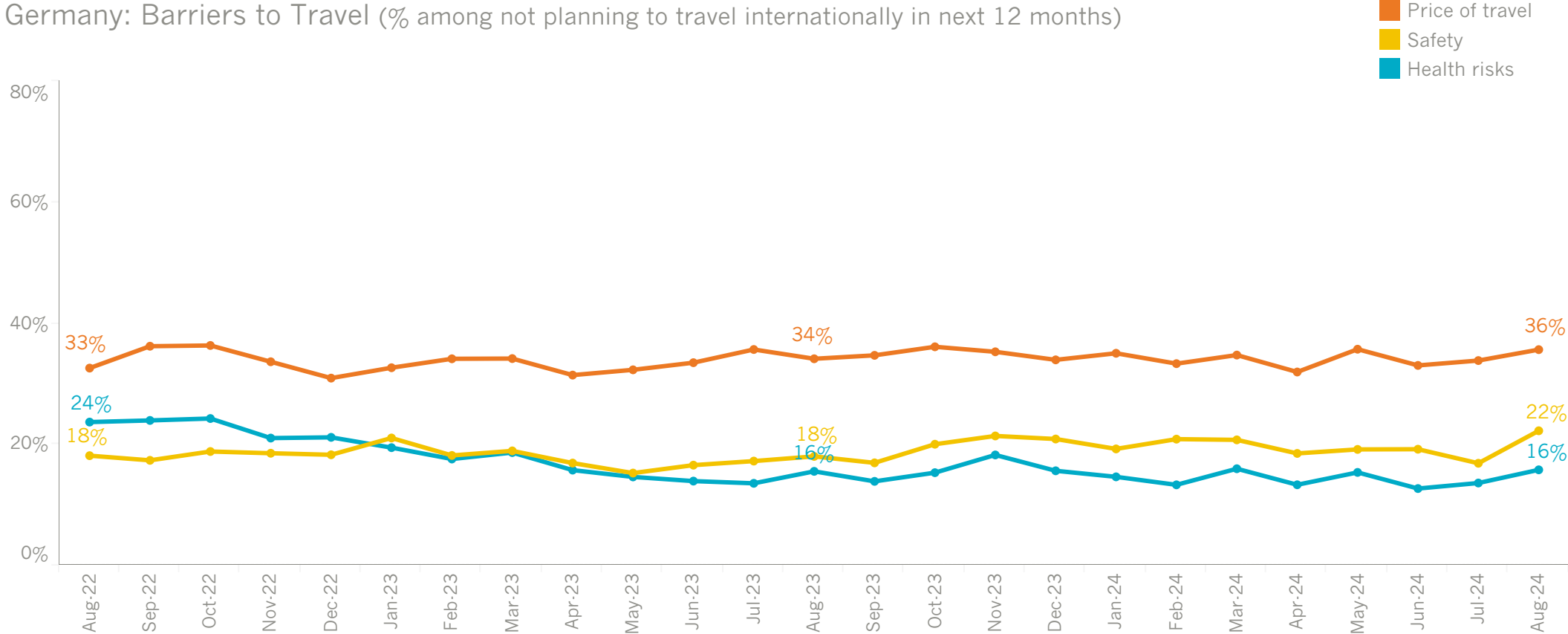
- Domestic leisure
- Domestic business
- International leisure
- International business



Barriers to Travel

The chart below shows perceived barriers to travel among consumers not currently planning an international trip in the focus market.

Germany: Barriers to Travel (% among not planning to travel internationally in next 12 months)



Q: Which, if any, of the below factors are currently preventing you from traveling?

Data reported through: August 2024

Source: YouGov



Audience Insights



Int'l leisure travelers
considering California
"CA Traveler Target"

Audience Profile

The chart shows the incidence of international leisure travelers in the focus market and the subset of international leisure travelers considering California as a destination.

The following audience profile is based on the survey responses over a 12-month period of those consumers considering California as a destination for international leisure travel.

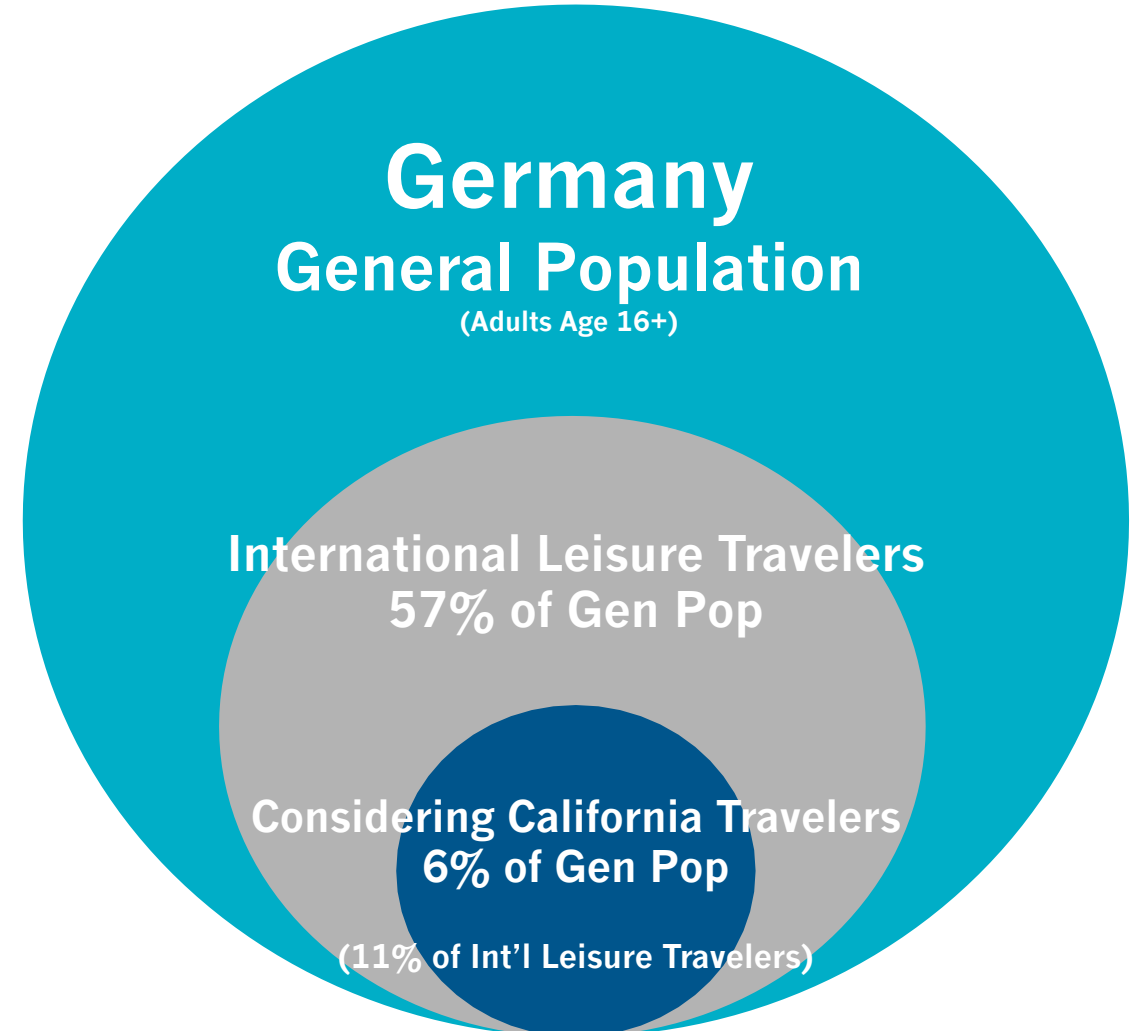
Definitions:

International Leisure Travelers:

Consumers in the focus market planning an international leisure trip in the next 12 months.

Considering California Travelers ("CA Traveler Target"):

Among the consumers in the focus market planning international leisure travel, those who are considering California as destination for travel in the next 12 months.



How to Read the Data

Generation	CA Traveler Target	Index
Gen Z	5%	59
Millennial	51%	115
Gen X	29%	124
Baby Boomer	13%	60

Generation Definitions:

- Gen Z (2000 and later)
- Millennial (1982-1999)
- Gen X (1965-1981)
- Boomer (1946-1964)

Data:

- **CA Traveler Target:** Shows the incidence (%) of the demographic characteristic or travel activity among international leisure travelers considering California as a destination in the focus market.
- **Index:** Compares the incidence (%) of the CA Traveler Target to the incidence (%) of all International Leisure Travelers. For example, an index of 115 indicates that the measure among the CA Traveler Target is 1.15x greater than among International Leisure Travelers in the focus market.



Int'l leisure travelers
considering California
"CA Traveler Target"

Demographic Profile

The chart below shows the demographic profile of the consumer target in the focus market.

Germany

Gender		
	CA Traveler Target	Index
Female	46%	94
Male	54%	106

Marital Status		
	CA Traveler Target	Index
Married	40%	85
Single	31%	120
Living w/ Partner	17%	131

Family Status		
	CA Traveler Target	Index
Children <18	22%	95

Age		
	CA Traveler Target	Index
Age 16-24	15%	148
Age 25-34	21%	123
Age 35-44	17%	108
Age 45-54	22%	105
Age 55+	25%	69

Generation		
	CA Traveler Target	Index
Gen Z	12%	146
Millennial	37%	121
Gen X	34%	103
Baby Boomer	17%	62

Income*		
	CA Traveler Target	Index
Higher income	6%	149
Middle income	54%	107
Lower income	25%	84
Prefer not to say	14%	95

Region		
	CA Traveler Target	Index
North Rhine-Westphalia	23%	104
Bavaria	17%	100
Baden-Wuerttemberg	14%	102
Hesse	9%	117
Lower Saxony	8%	95
Rheinland-Pfalz	5%	106
Berlin	5%	106
Schleswig-Holstein	4%	112
Saxony	3%	72
Brandenburg	3%	112
Hamburg	2%	92

*Income definitions: Higher >200% of median, Middle 75% to 200% of median, Lower <75% of median



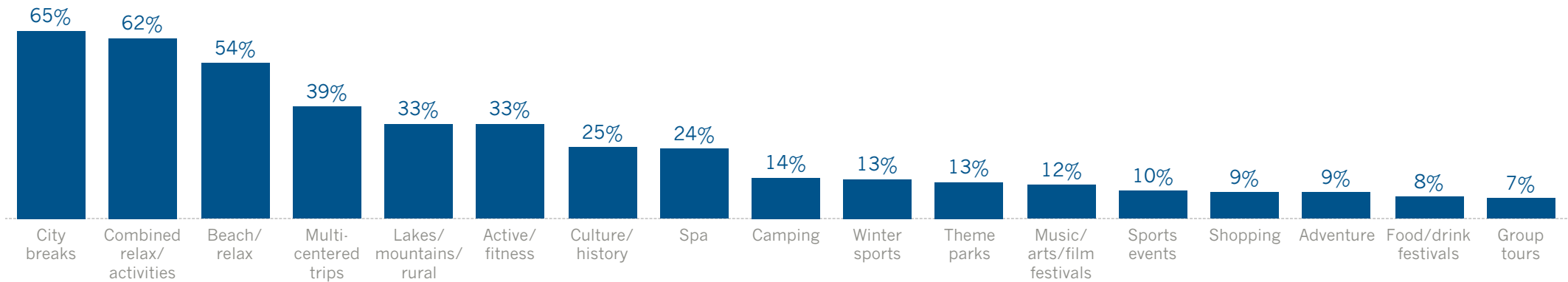
Int'l leisure travelers
considering California
"CA Traveler Target"

Trip Preferences/Characteristics

The chart below shows the typical trip preferences & characteristics of the consumer target in the focus market.

Germany

Trip Type



Traveler Type

	CA Traveler Target	Index
Budget	24%	91
Adventurous	24%	139
All-inclusive	17%	96
Responsible	12%	86
Luxury	8%	143

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	63%	94
My children	29%	101
Friend(s)	25%	132
Other family	19%	131
Solo	7%	89
Other person(s)	4%	158

Q Trip Type: Which of the following types of holidays do you typically take?

Q Traveler Type: Which of the following best describes the type of traveler you are?

Q Travel Party: Thinking about your most recent holiday, which of the following best describes the group or individual you went on holiday with?

Source: YouGov (July 2023 to June 2024)



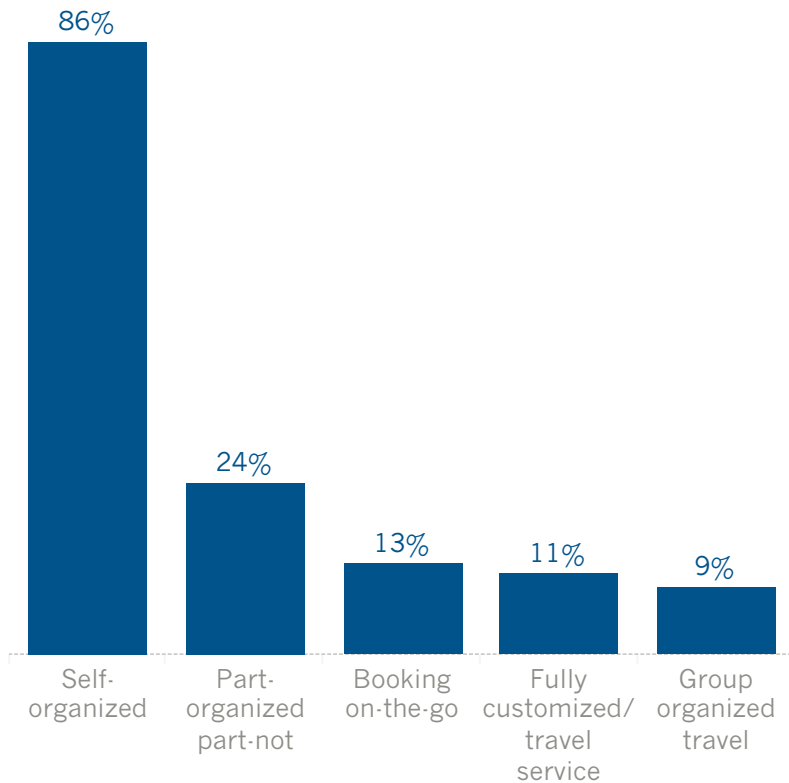
Int'l leisure travelers
considering California
"CA Traveler Target"

Organizing/Planning Methods

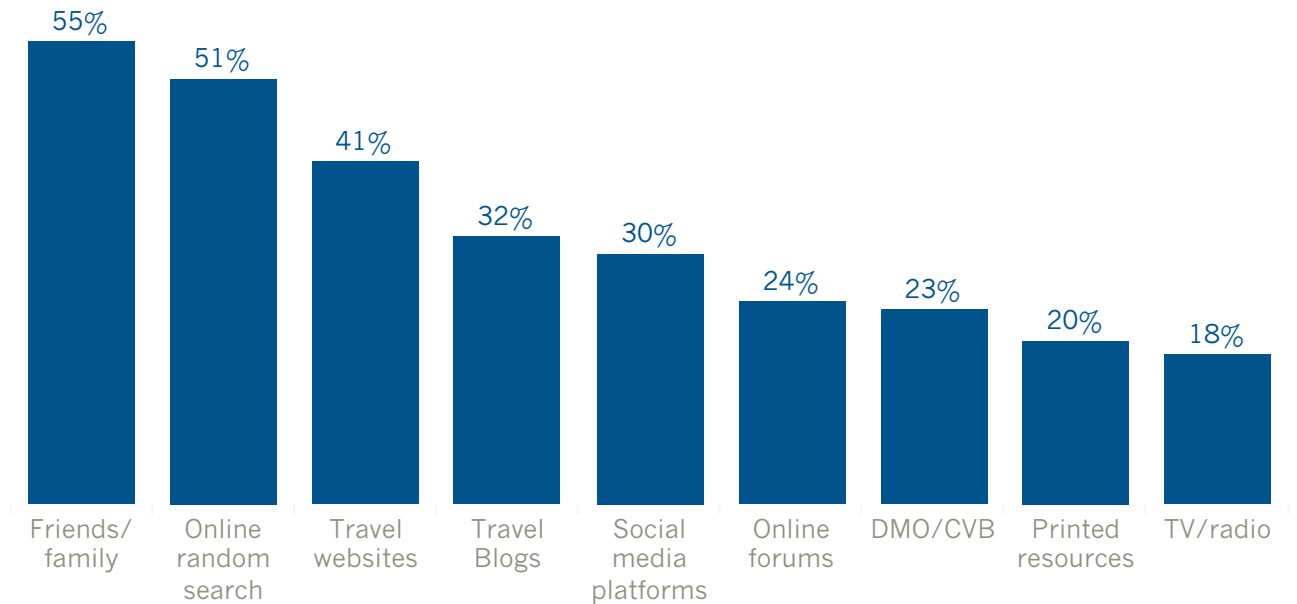
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

Germany

Organizing Travel



Planning Methods



Q Organizing: Which of the following describe how you generally organize your holidays?
Q Planning: Which of the following methods do you generally use to help plan a holiday?

Source: YouGov (July 2023 to June 2024)

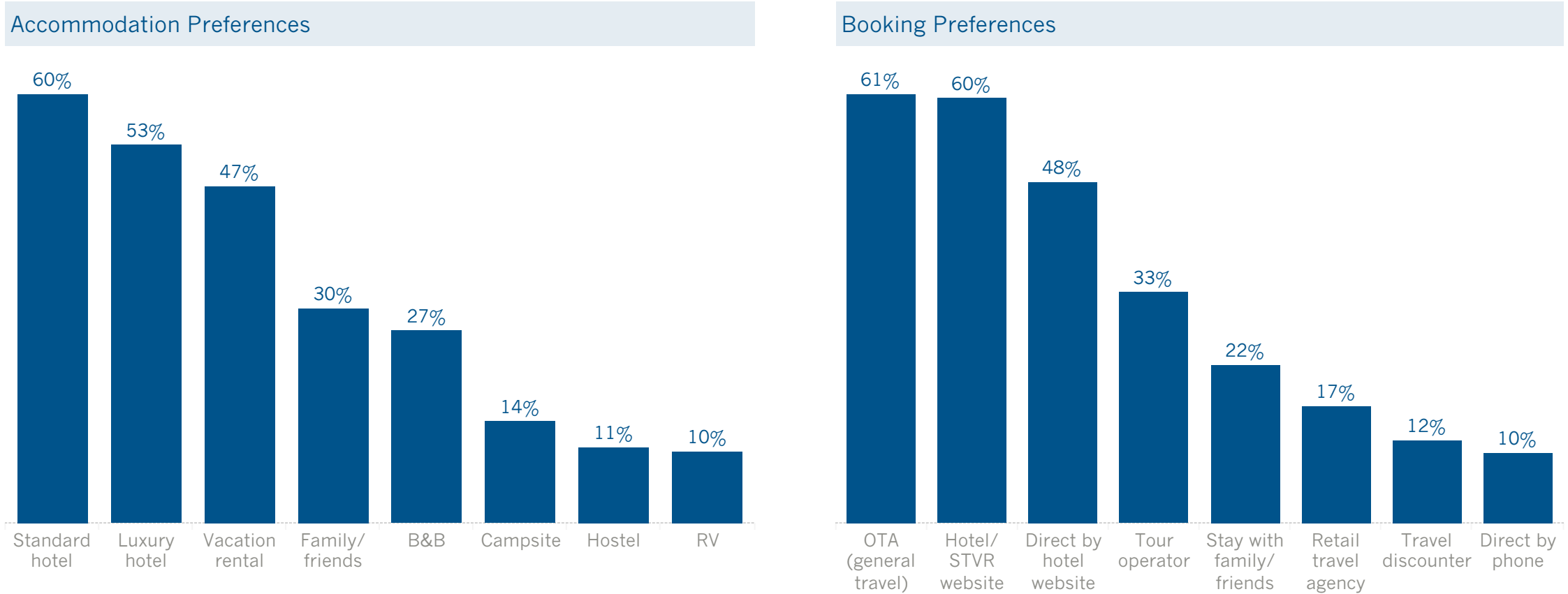


Int'l leisure travelers
considering California
"CA Traveler Target"

Booking Preferences

The chart below shows the accommodation preferences of of the consumer target in the focus market.

Germany



Q Accommodation: Which of the following types of accommodations do you typically stay in when you are on holiday?
Q Booking: Which of the following booking methods do you typically use when booking accommodations for the holidays?



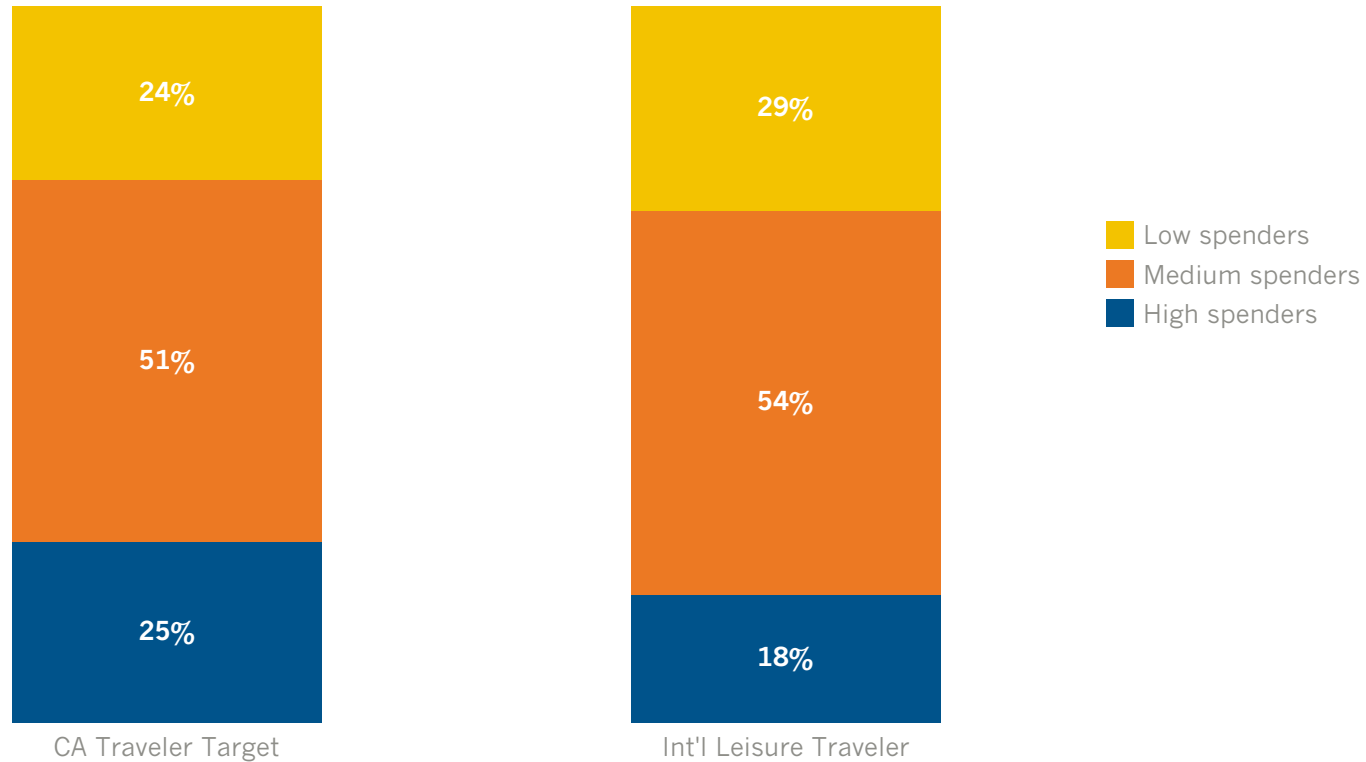
Int'l leisure travelers
considering California
"CA Traveler Target"

Travel Spending

The chart shows the travel spending of the consumer target in the focus market based on the most recent vacation.

Germany

Travel Spending (from most recent vacation)





Int'l leisure travelers
considering California
"CA Traveler Target"

Media & Advertising

The data shows advertising influences and sports preferences of the target consumer in the focus market.

Germany

Advertising Influences

	CA Traveler Target	Index
Social media	46%	126
Travel websites	41%	126
Online streaming services	34%	131
Billboards	31%	143
TV - Free to view channels	30%	121
Radio	23%	124
Public transport	21%	151
Magazines (digital)	21%	131
Cinema	20%	153
Podcast	19%	183
Local newspaper (physical)	19%	97
Magazines (physical)	19%	117
Direct mail	18%	100
TV - paid/subscription	18%	150
Local newspaper (digital)	16%	104
National newspaper (digital)	13%	119
National newspaper (physical)	13%	125

Sports Watched/Followed

	CA Traveler Target	Index
Soccer/Football	37%	110
NFL	15%	214
Tennis	14%	127
Basketball	12%	160
Athletics/Track & Field	11%	99
Swimming	10%	149
Ice Hockey	10%	136
Cycling	10%	122
Boxing	9%	143
Running/Marathon	7%	140
Volleyball	6%	167
Baseball	5%	276
Golf	5%	171
Surfing	3%	242
Gymnastics	3%	115
Rugby League	3%	285
Horse Racing	3%	190
Cricket	2%	368
Australian Rules Football	2%	336

Q Advertising: Thinking about your next travel or holiday related purchase,...where would you advertise to catch your attention?

Q Sports: Which of the following sports do you watch or follow?

Source: YouGov (July 2023 to June 2024)



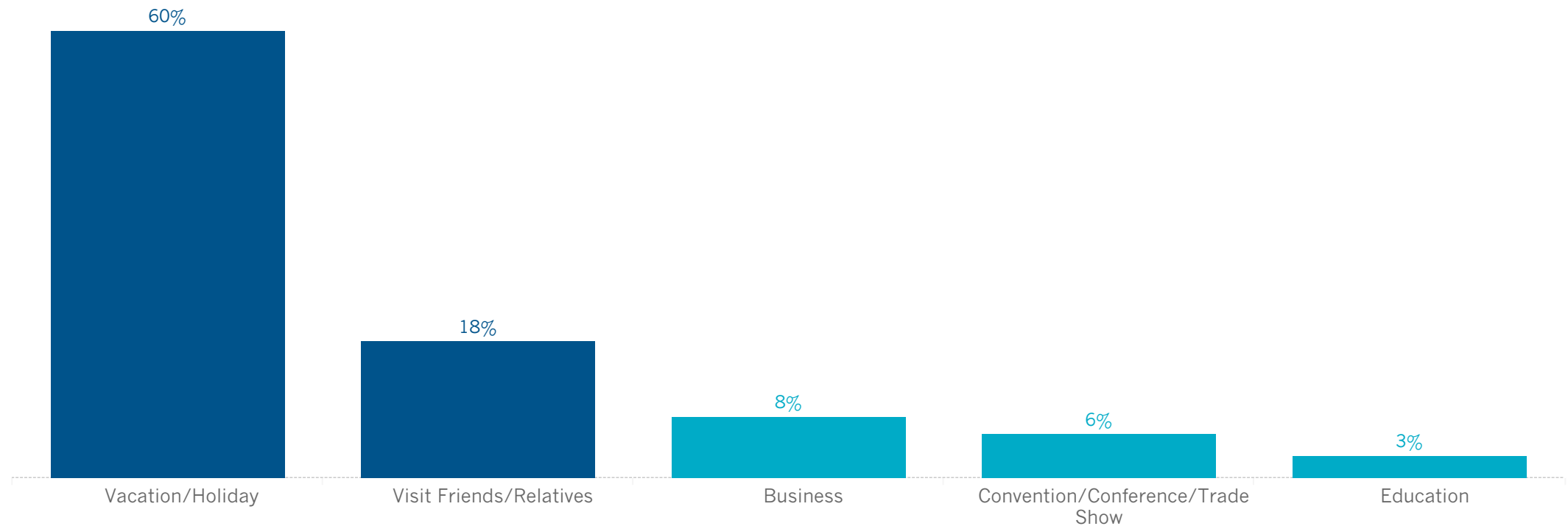
California Travelers & California Trip Characteristics

Main Purpose of Trip

The chart below shows the main purpose of the trip among travelers in the focus market.

Germany

Main Purpose of Trip

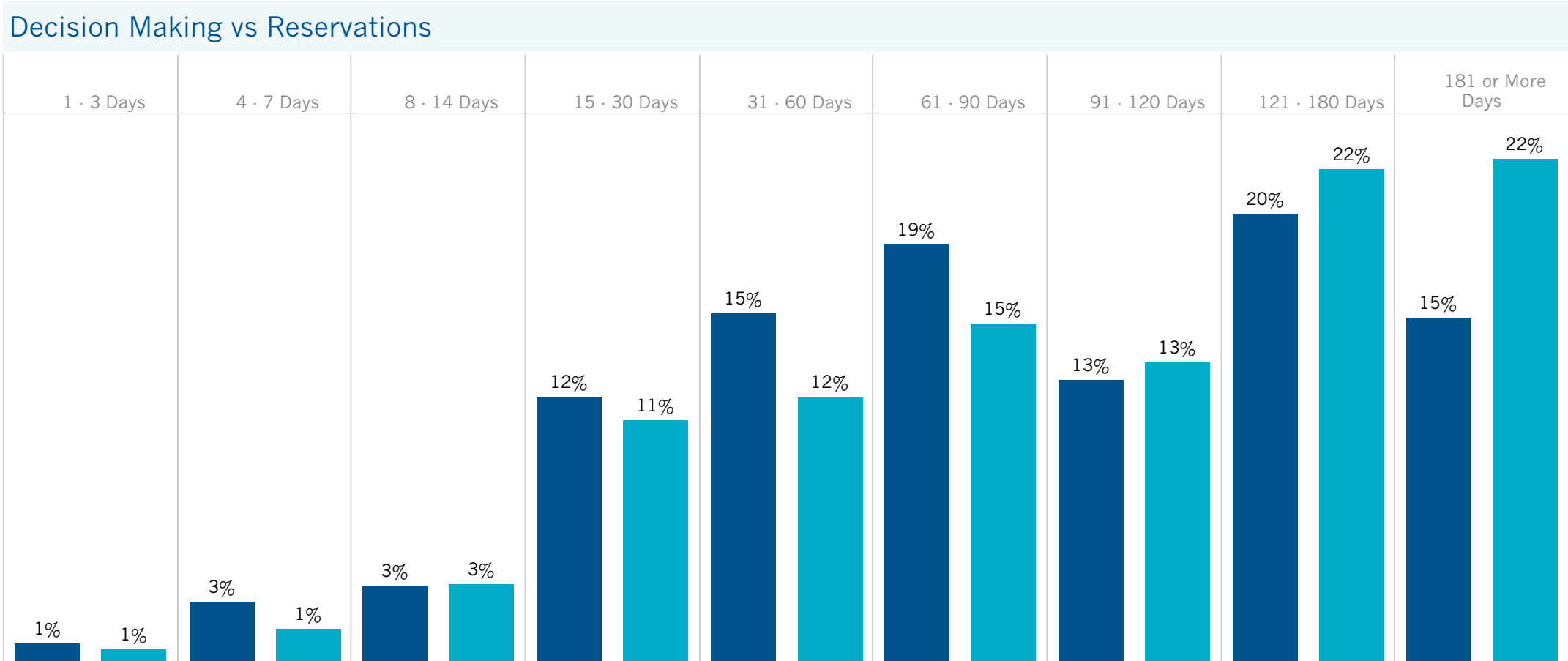




Decision Making vs Reservations

The chart below shows the timeframe for making the decision to travel and making the reservations among travelers in the focus market..

Germany



■ How many days prior to departure did you make air travel reservations? (%)

■ How many days prior to departure did you make the decision to travel? (%)

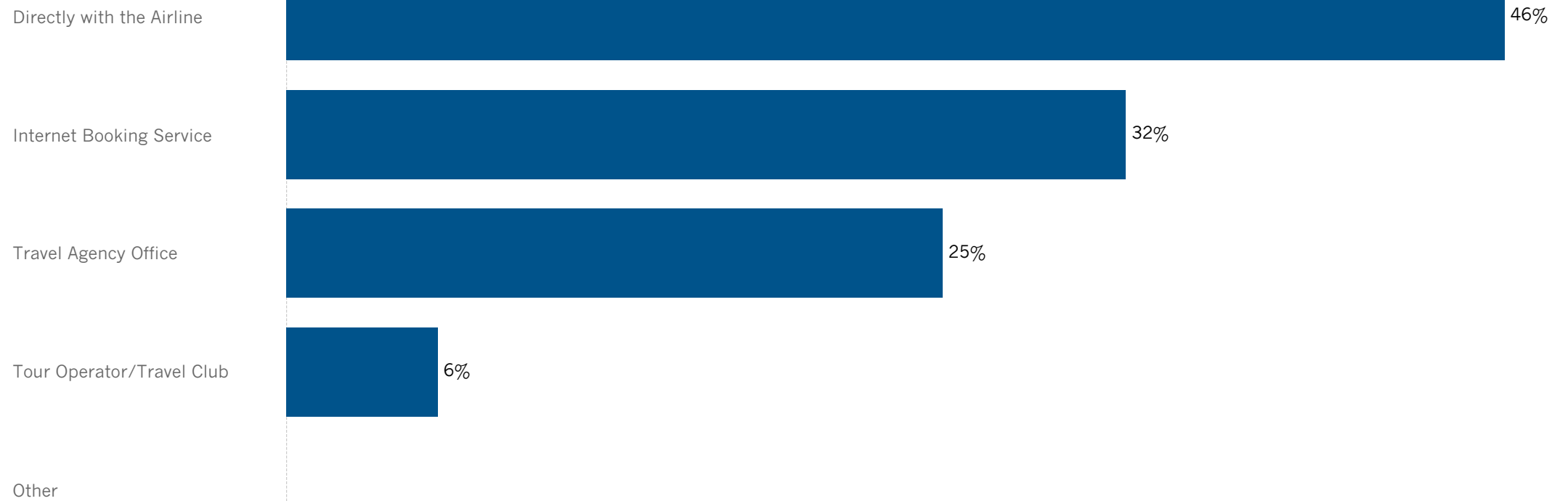


Airline Reservations

The chart below shows how airline reservations were made for the trip among travelers in the focus market.

Germany

Airline Reservations



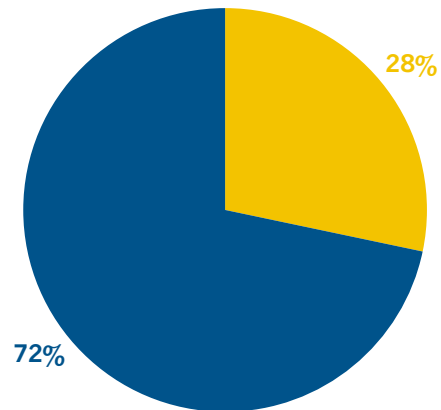


First/Repeat Visitation, Travel Party Size

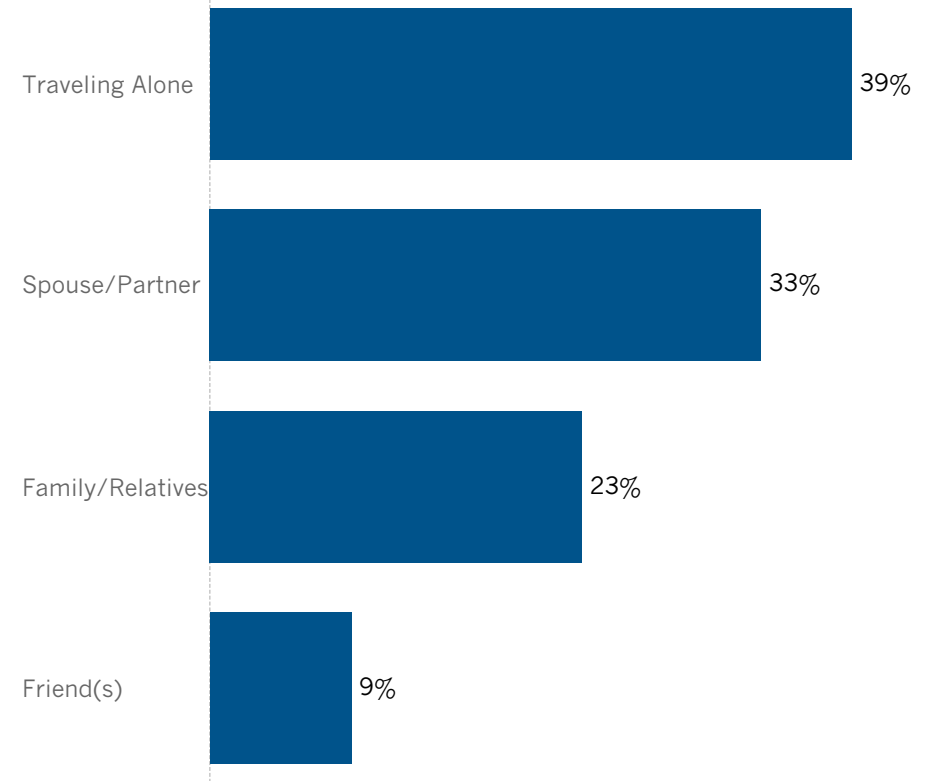
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

Germany

First trip to the US



Travel Companion



Q. Is this your first trip by air to the US?
Q. With whom are you travelling now?

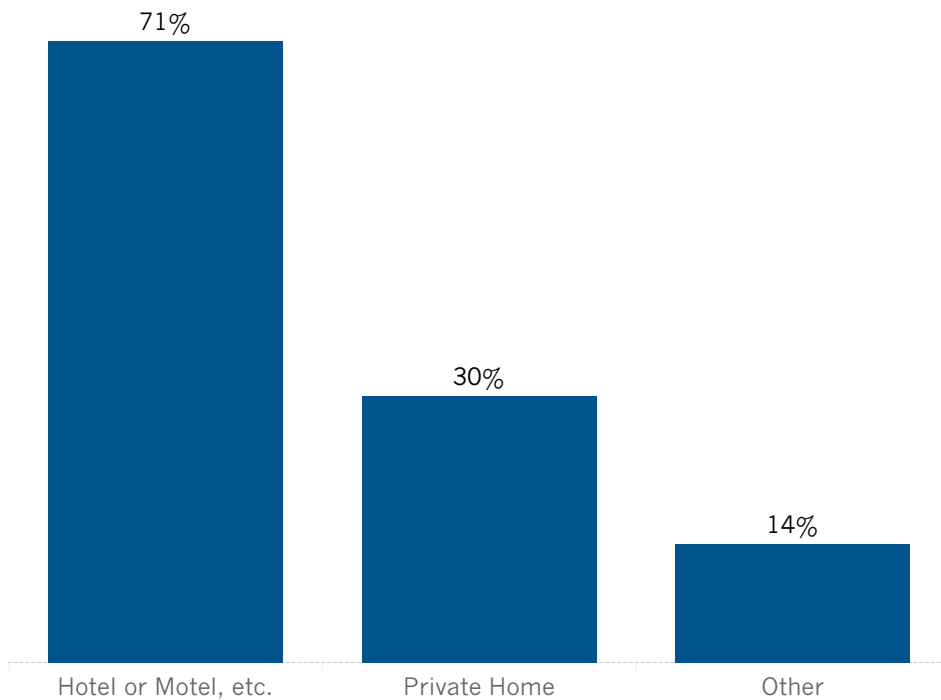


Types of Accommodations & Nights

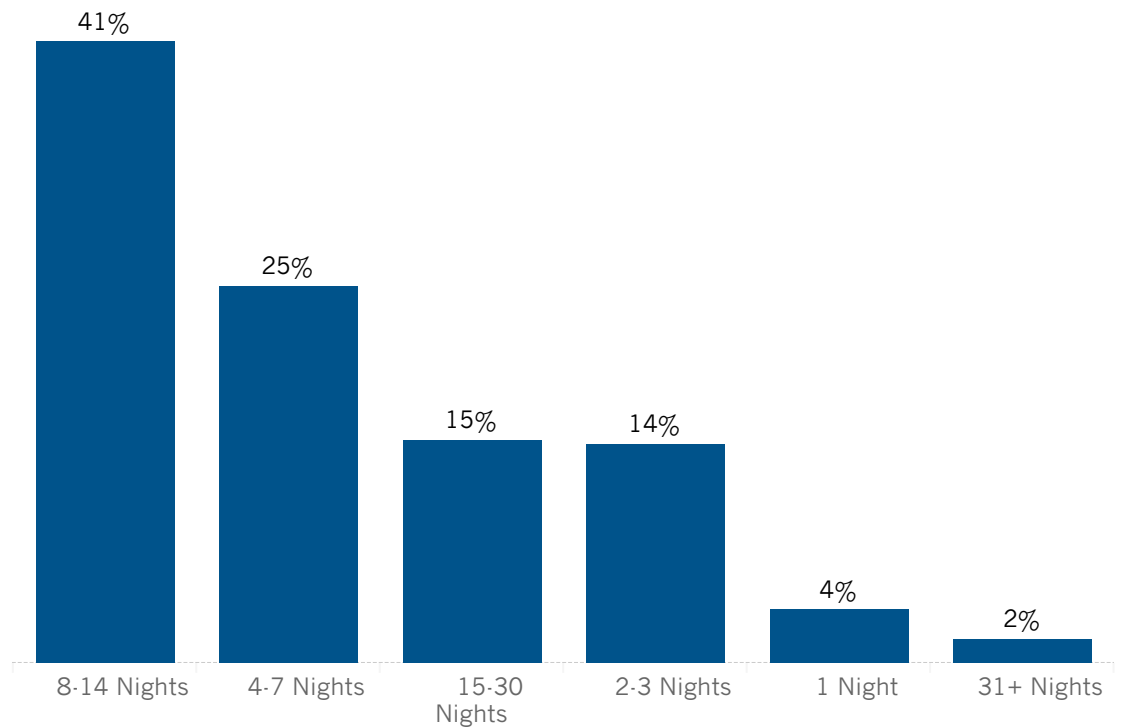
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

Germany

Types of Accommodations



Nights in Destination



Q. Type of accommodations in the destination
Q. Overall nights in destination

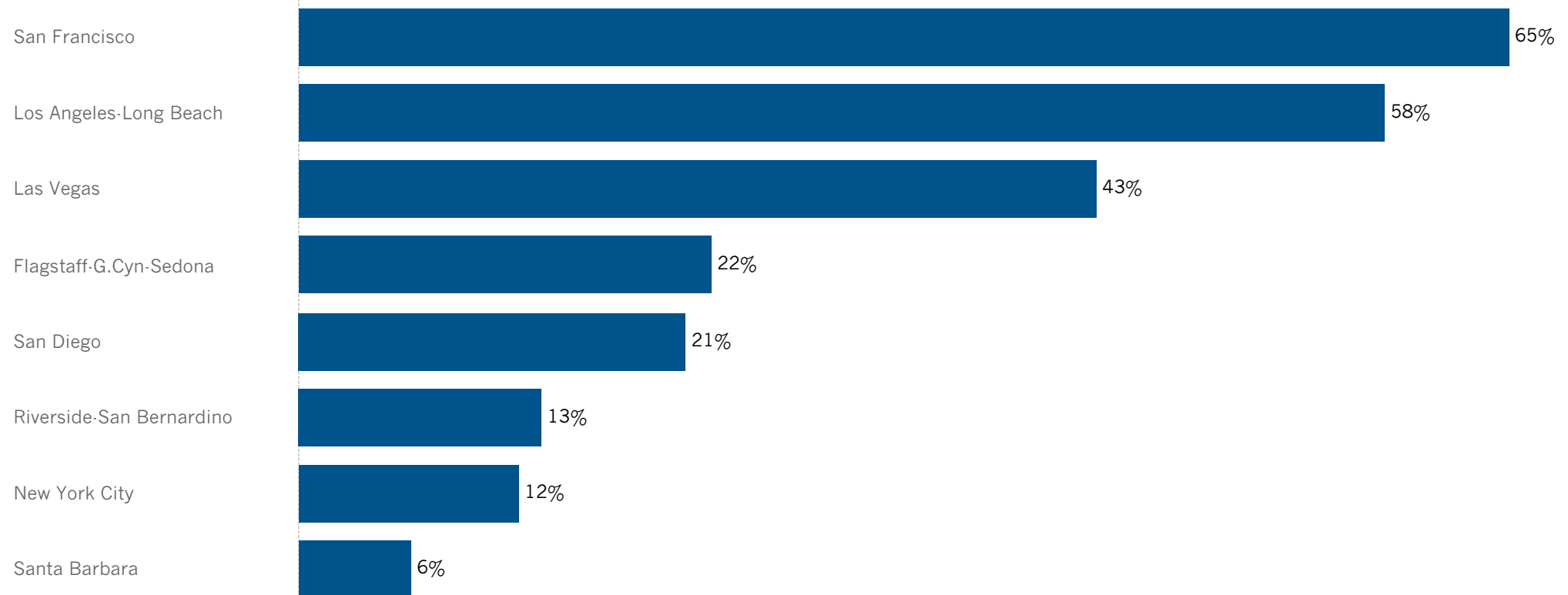


Destinations Visited

The chart below shows the U.S. destinations visited on a trip among travelers from the focus market.

Germany

US Destinations visited



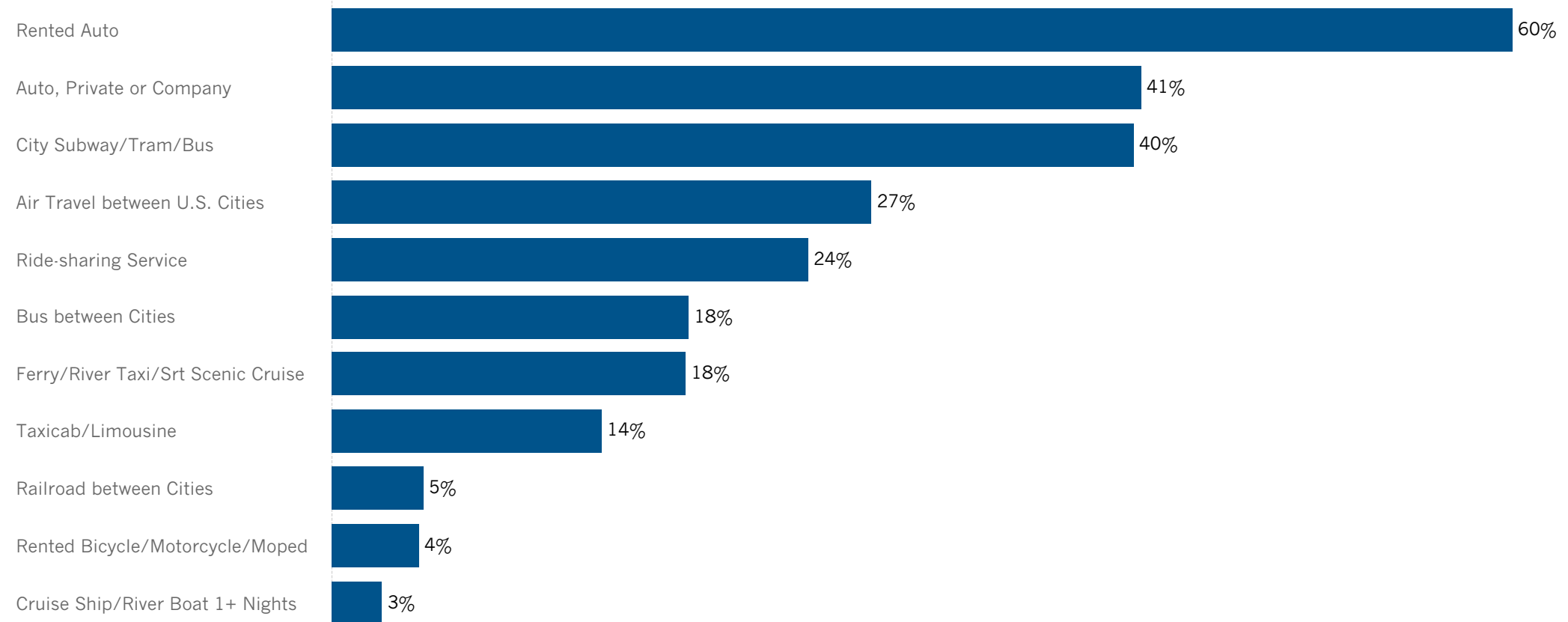


Transportation

The chart below shows the types of transportation used on the trip among travelers in the focus market.

Germany

Types of Transportation



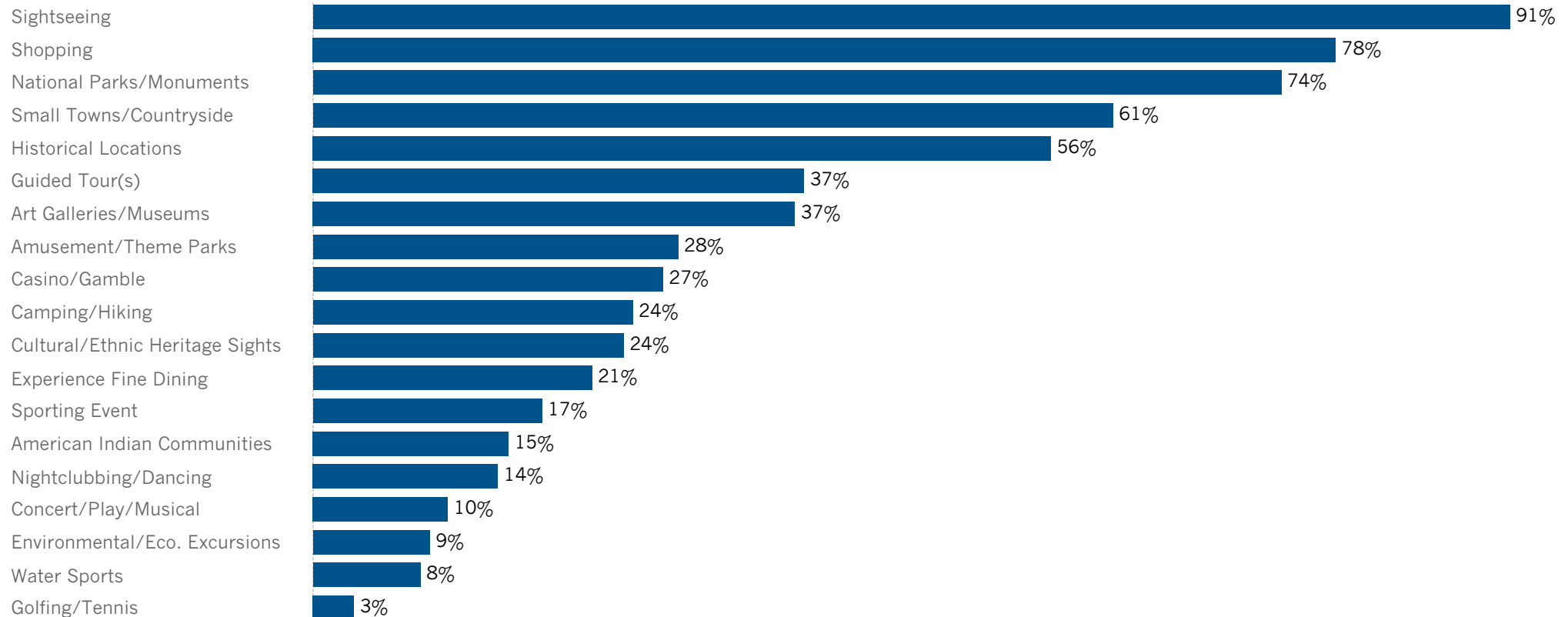


Activities

The chart below shows the leisure activities engaged in on a U.S. trip among travelers to California from the focus market.

Germany

Engaged Activities





Expenditures in the US

The chart below shows mean expenditures by category among travelers to California from the focus market.

Germany

Expenditures per visitor

