Global Market Profile

GERMANY

Introduction

- Tourism Economics forecasts domestic leisure visitation will account for $101B in spending in California in 2024 and international visitation will account for $29B in spending in the state.

- In this highly competitive environment for tourism dollars and with travel demand normalizing, effective global marketing is critical to California achieving these spending numbers which requires a deep knowledge of the domestic and international markets that drive tourism spending in the state. This includes an understanding of the audience of travelers most likely to visit California in the next year.

- The **Global Market Profile** report has been 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:
  - o Visitation and Spending Forecasts
  - o Airlift Recovery (flights and seats)
  - o Arrival Numbers & California Market Share
  - o 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).

*Profile targets for China and Japan include travelers considering California and/or other U.S. destinations due to sample size limitations.

Market Landscape

Country Profile

Germany

POPULATION: *
83.3M

EXCHANGE RATE: **
Local currency to USD dollar
0.9

GROSS DOMESTIC PRODUCT (GDP):
Annual % chg **
-0.1%

INFLATION RATE:
Annual % chg ***
6.2%

Forecast: Visitor Spending by Market (2024)

The chart below shows California's visitor spending forecast for the state's 14 target markets and share of total international spending in the state.

Market	Share	Spending
Mexico total	16%	$4,601
Mexico (land)	12%	$3,663
Mexico (air)	3%	$938
Canada	13%	$3,890
China	7%	$2,176
India	6%	$1,809
United Kingdom	5%	$1,515
Japan	5%	$1,467
France	4%	$1,292
Australia	4%	$1,297
South Korea	4%	$1,232
Germany	4%	$1,096
Italy	2%	$526
Nordics	2%	$511
Middle East	1%	$226

Source: Tourism Economics (Feb 2024)
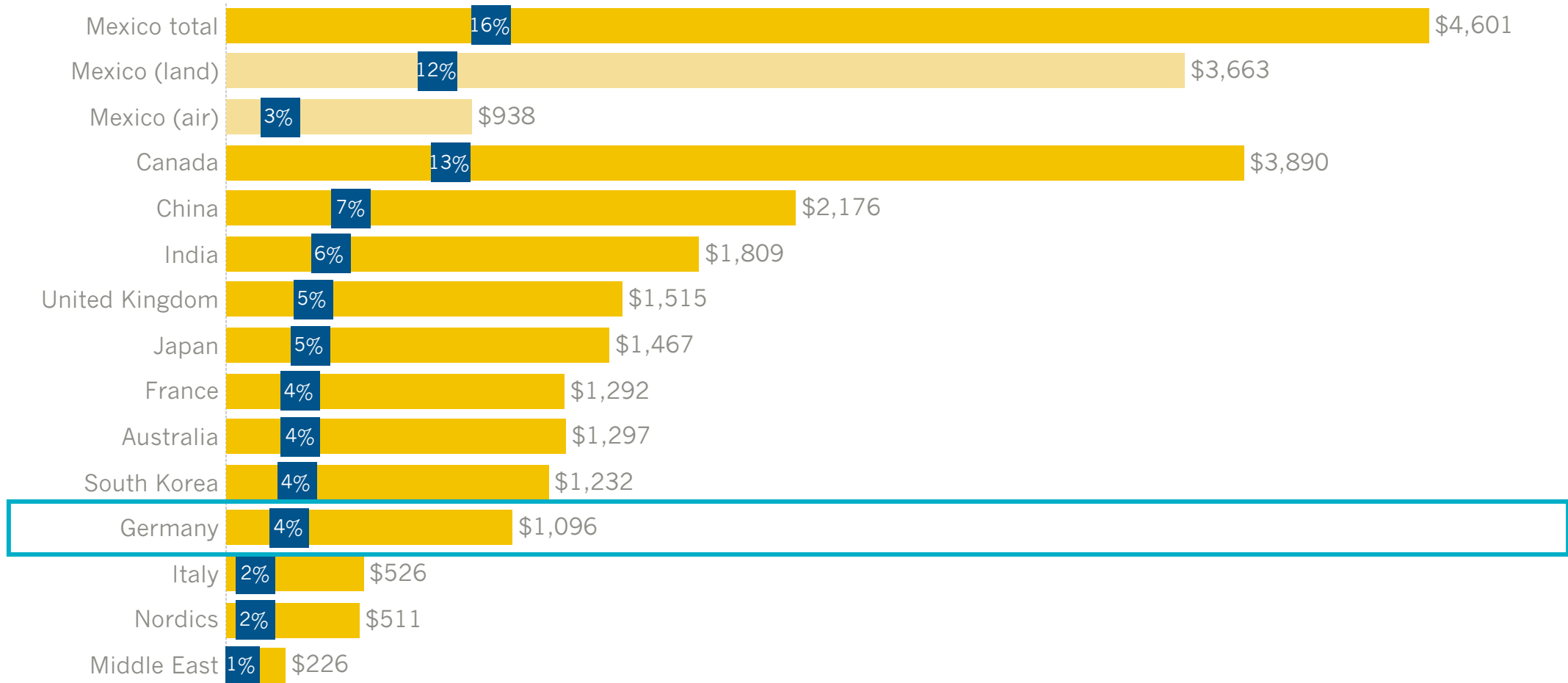
Forecast: Visitor Spending

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

Germany: Visitor Spending Forecast with Recovery Index to 2019

■ Spending (millions)   ■ Recovery Index to 2019

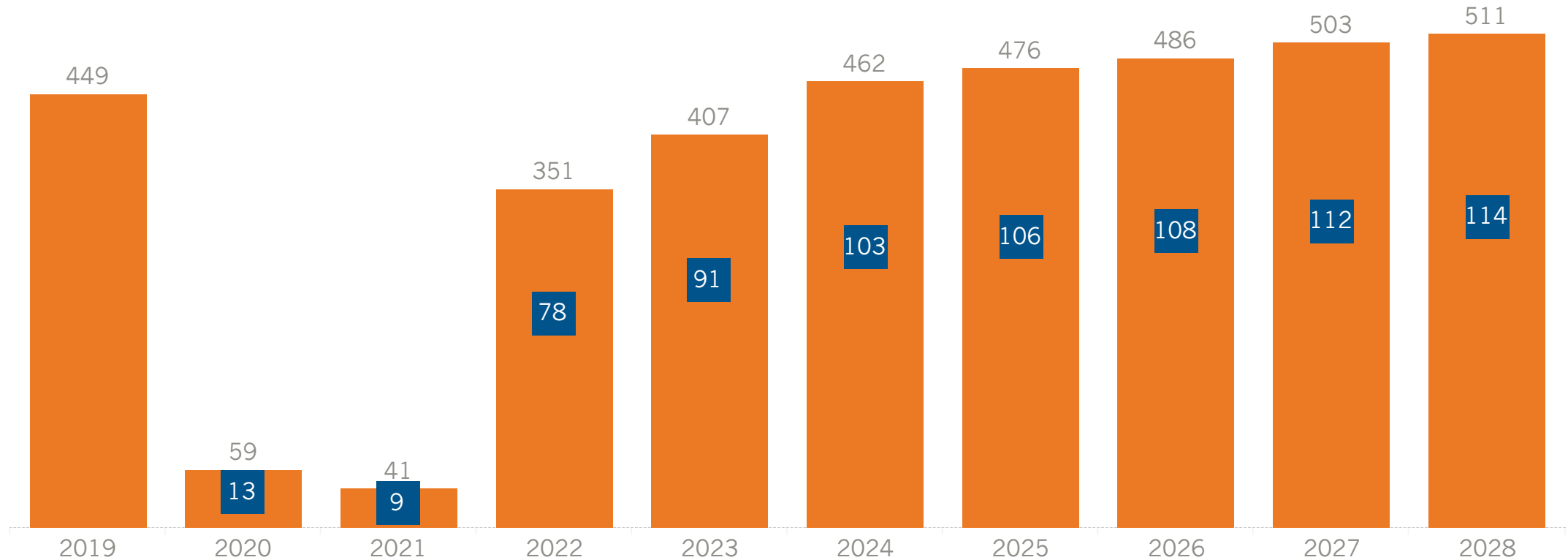| Year	Spending	Recovery Index
2019	$977	
2020	$125	13
2021	$86	9
2022	$816	84
2023	$957	98
2024	$1,096	112
2025	$1,153	118
2026	$1,201	123
2027	$1,267	130
2028	$1,301	133
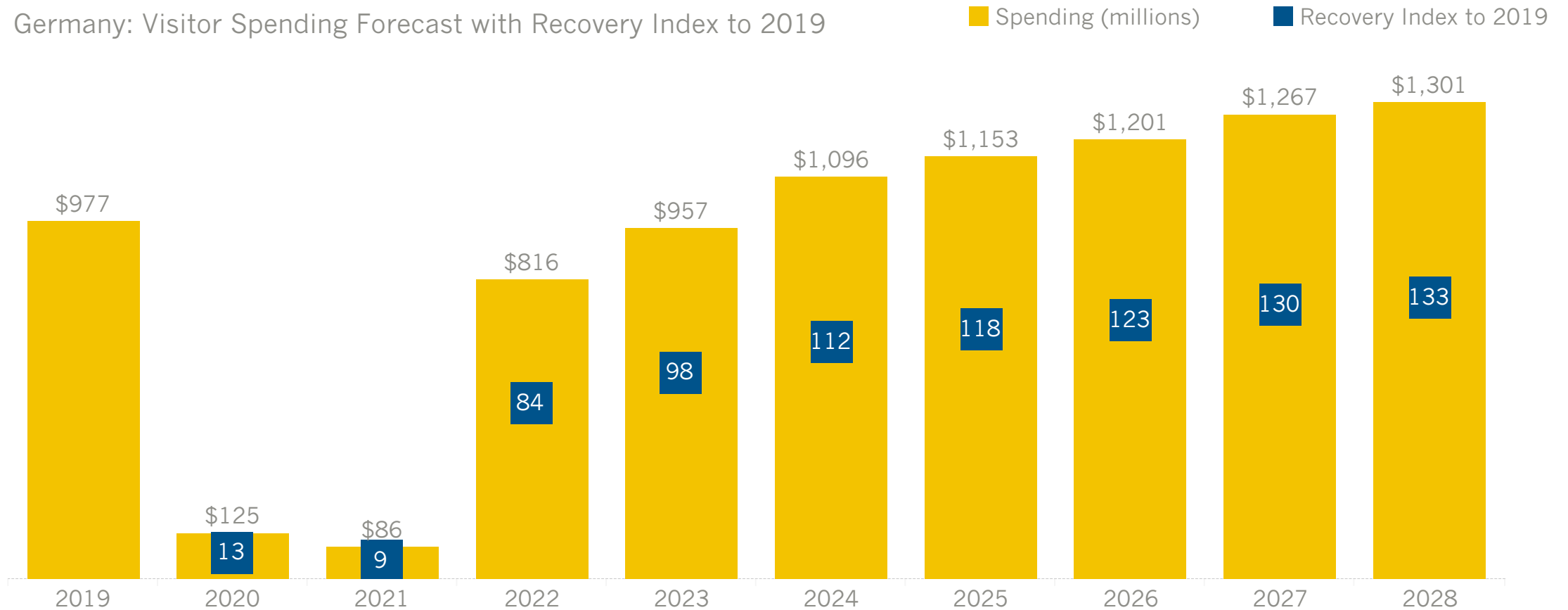
Forecast: Visitor Volume

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

Germany: Visitation Forecast with Recovery Index to 2019

■ Visitation (thousands)   ■ Recovery Index to 2019

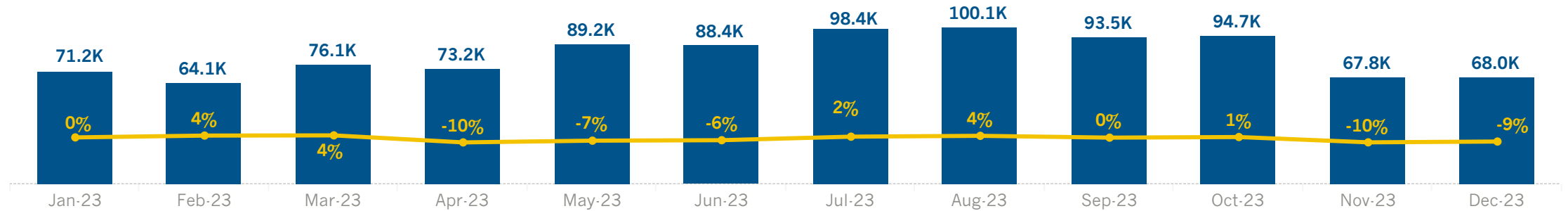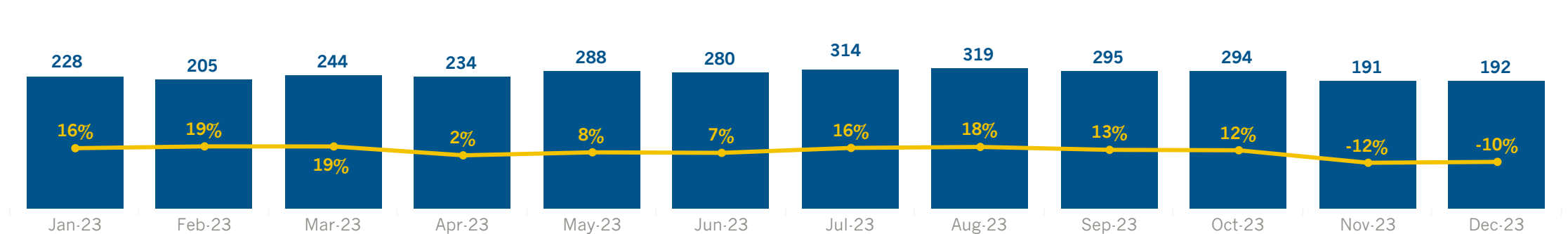| Year	Visitation (thousands)	Recovery Index to 2019
2019	449	
2020	59	13
2021	41	9
2022	351	78
2023	407	91
2024	462	103
2025	476	106
2026	486	108
2027	503	112
2028	511	114

Airlift to California

The charts below shows airlift to California and percent change to 2019 for the focus market.
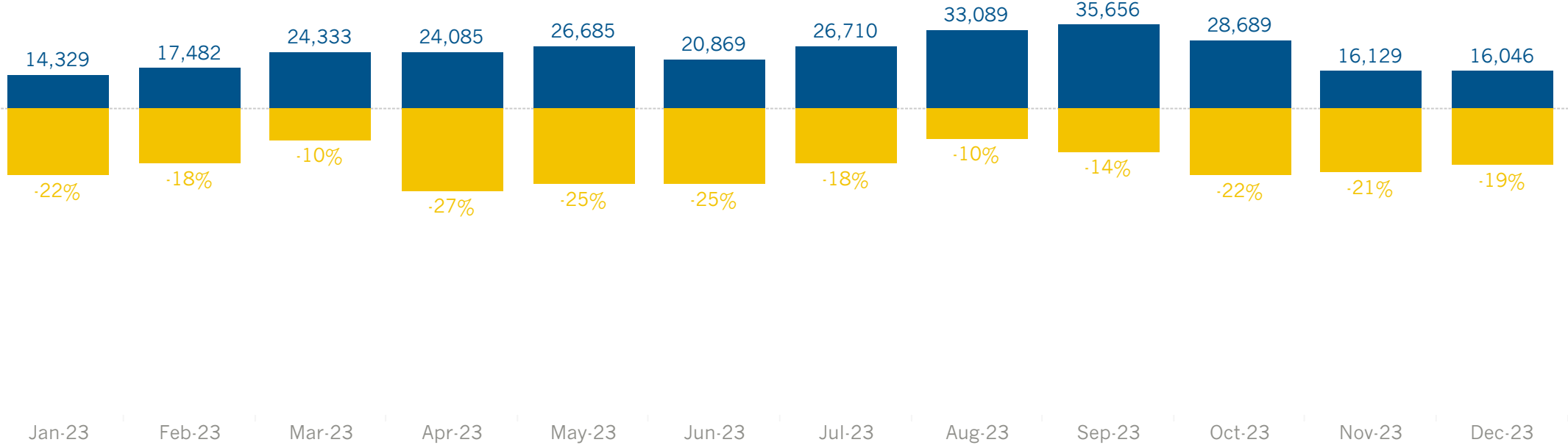
Germany: Non-Stop Seats to CA (% chg vs 2019)

	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Seats	71.2K	64.1K	76.1K	73.2K	89.2K	88.4K	98.4K	100.1K	93.5K	94.7K	67.8K	68.0K
% chg	0%	4%	4%	-10%	-7%	-6%	2%	4%	0%	1%	-10%	-9%

Germany: Non-Stop Flights to CA (% chg vs 2019)

	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
Flights	228	205	244	234	288	280	314	319	295	294	191	192
% chg	16%	19%	19%	2%	8%	7%	16%	18%	13%	12%	-12%	-10%

Source: Cirium

Non-Resident Arrivals to California

The chart below shows non-resident arrivals at California's ports of entry and percent change to 2019 for the focus market.

Germany: Non-Resident Arrivals at CA Ports of Entry (% change vs. 2019)
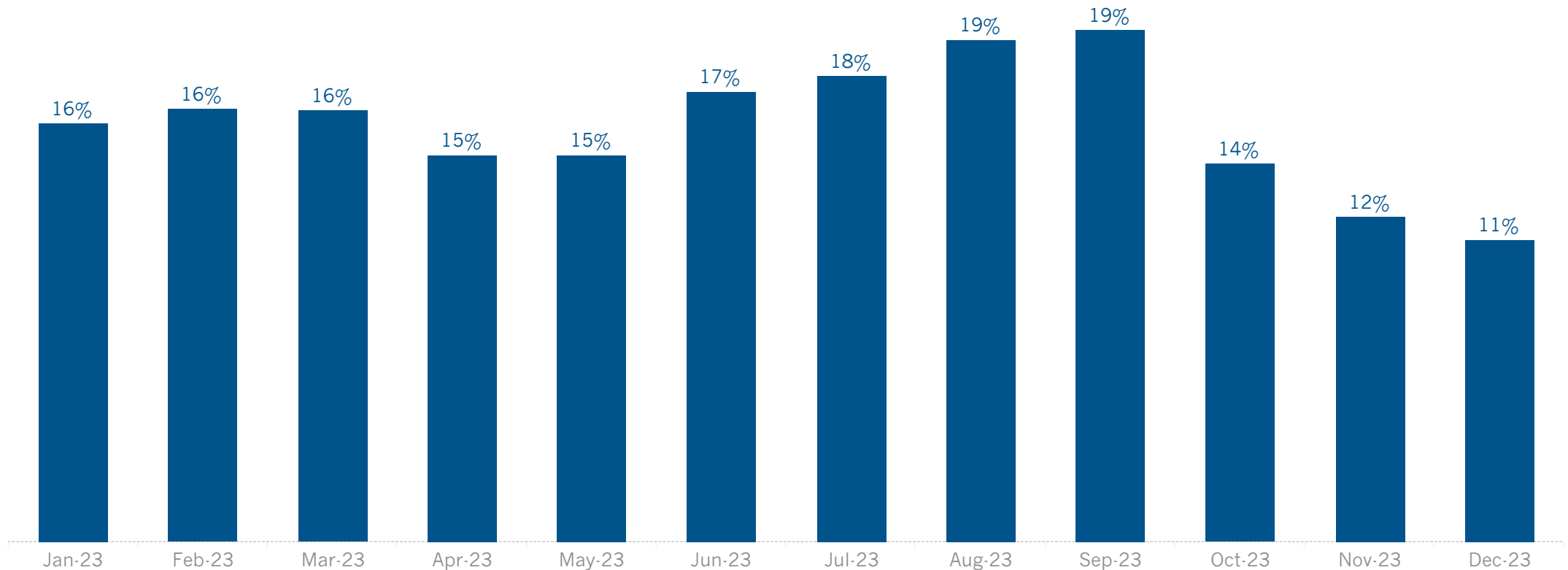
Month	Arrivals	% change
Jan-23	14,329	-22%
Feb-23	17,482	-18%
Mar-23	24,333	-10%
Apr-23	24,085	-27%
May-23	26,685	-25%
Jun-23	20,869	-25%
Jul-23	26,710	-18%
Aug-23	33,089	-10%
Sep-23	35,656	-14%
Oct-23	28,689	-22%
Nov-23	16,129	-21%
Dec-23	16,046	-19%

California's Share of Arrivals

The chart below shows California's share of arrivals from the focus market based on First Intended Address (FIA).

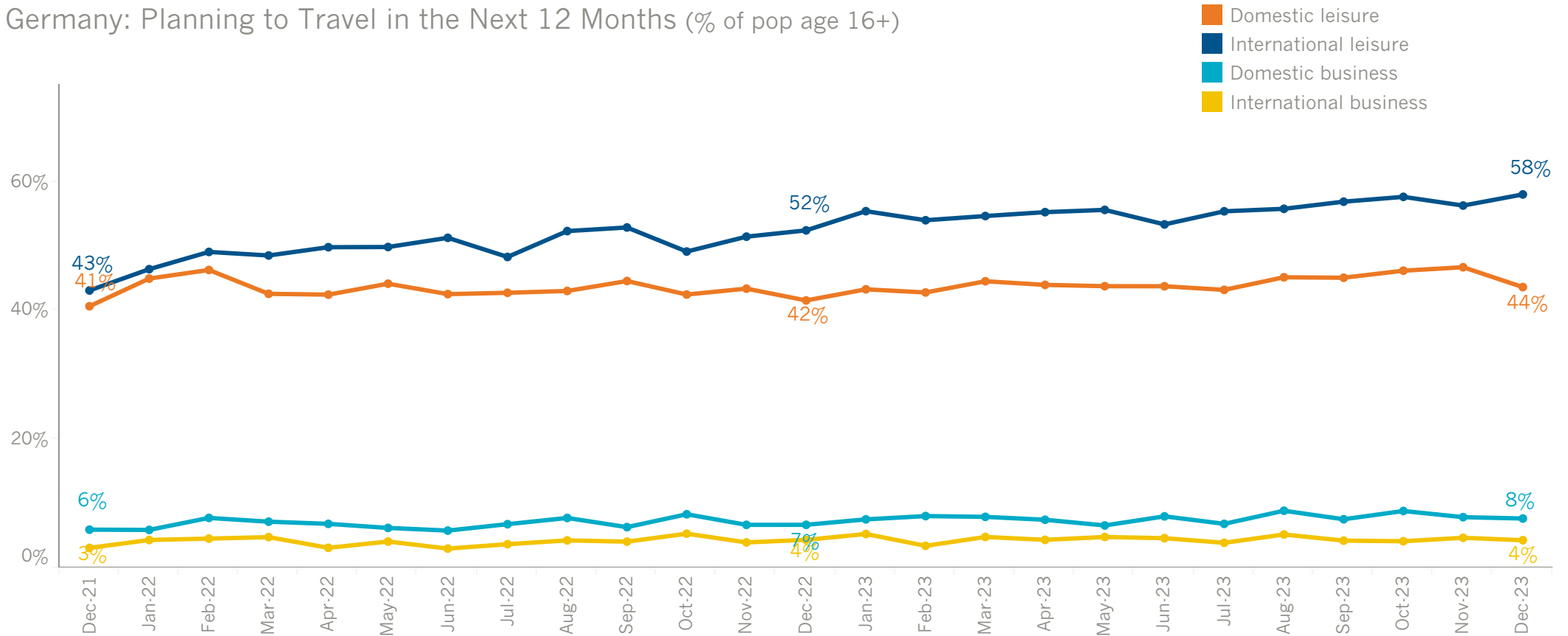Germany: California Market Share of Arrivals Based on First Intended Address (%)

Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23
16%	16%	16%	15%	15%	17%	18%	19%	19%	14%	12%	11%

Data reported through: December 2023

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+)

Legend:
- Domestic leisure
- International leisure
- Domestic business
- International business

Q: Which, if any, of the following trips are you planning to take in the next 12 months?
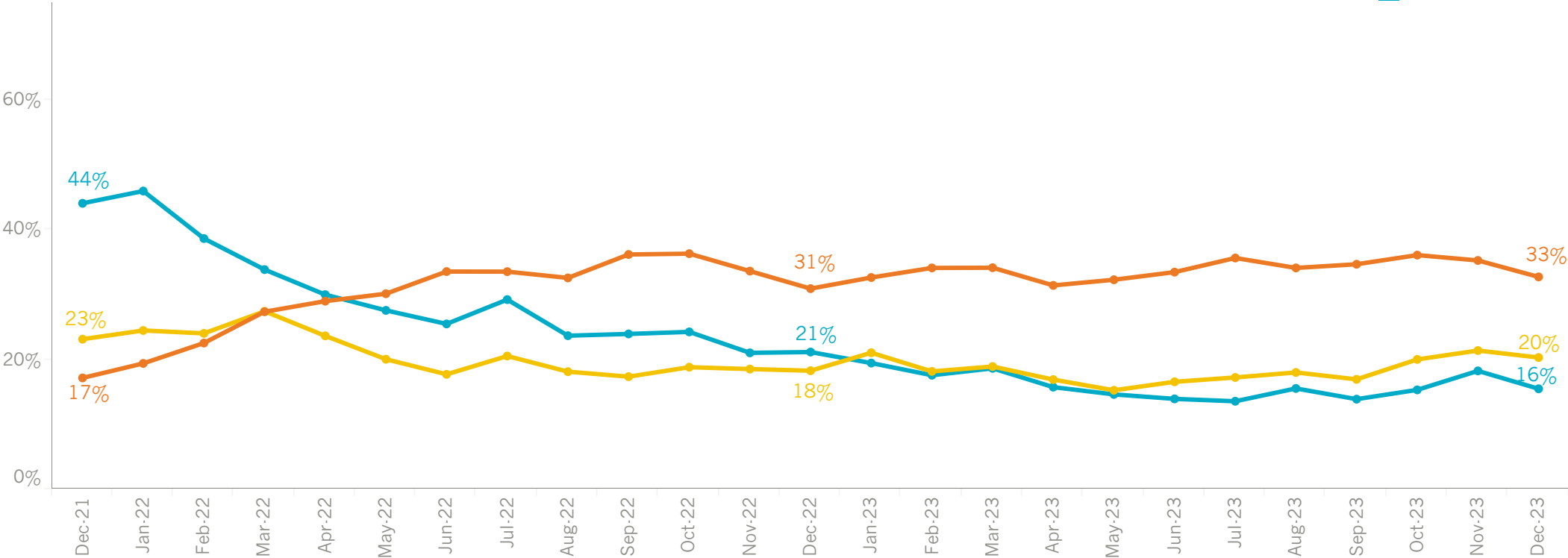Data reported through: December 2023

Source: YouGov

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)

- Price of travel
- Safety
- Health risks

Q: Which, if any, of the below factors are currently preventing you from traveling?
Data reported through: December 2023

Source: YouGov

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.

Germany
General Population
(Adults Age 16+)

International Leisure Travelers
56% of Gen Pop

Considering California Travelers
7% of Gen Pop

(12% of Int'l Leisure Travelers)

Source: YouGov (2023)

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.

Demographic Profile

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

Germany

Gender

	CA Traveler Target	Index
Female	45%	92
Male	55%	108

Marital Status

	CA Traveler Target	Index
Married	40%	85
Single	33%	128
Living w/ Partner	17%	129

Family Status

	CA Traveler Target	Index
Children <18	20%	95

Age

	CA Traveler Target	Index
Age 16-24	15%	149
Age 25-34	23%	129
Age 35-44	16%	102
Age 45-54	22%	106
Age 55+	24%	67

Generation

	CA Traveler Target	Index
Gen Z	10%	147
Millennial	39%	123
Gen X	33%	101
Baby Boomer	17%	64

Income*

	CA Traveler Target	Index
Higher income	6%	155
Middle income	51%	104
Lower income	25%	77
Prefer not to say	18%	120

Region

	CA Traveler Target	Index
North Rhine-Westphalia	21%	97
Bavaria	19%	108
Baden-Wurttemberg	16%	114
Hesse	9%	119
Lower Saxony	8%	95
Rheinland-Pfalz	6%	121
Berlin	5%	108
Schleswig-Holstein	3%	106
Saxony	3%	66
Brandenburg	3%	98
Hamburg	1%	64

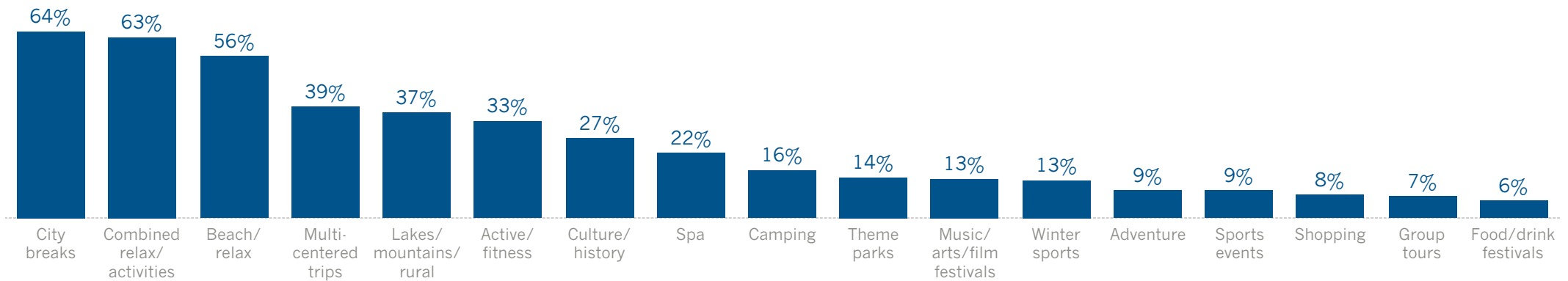*Income definitions: Higher >200% of median, Middle 75% to 200% of median, Lower <75% of median

Source: YouGov (2023)

Trip Preferences/Characteristics

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

Germany

Trip Type

Trip Type	%
City breaks	64%
Combined relax/activities	63%
Beach/relax	56%
Multi-centered trips	39%
Lakes/mountains/rural	37%
Active/fitness	33%
Culture/history	27%
Spa	22%
Camping	16%
Theme parks	14%
Music/arts/film festivals	13%
Winter sports	13%
Adventure	9%
Sports events	9%
Shopping	8%
Group tours	7%
Food/drink festivals	6%

Traveler Type

	CA Traveler Target	Index
Budget	25%	93
Adventurous	24%	138
All-inclusive	16%	93
Responsible	11%	80
Luxury	7%	133

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	63%	94
Friend(s)	29%	148
My children	29%	103
Other family	19%	137
Solo	7%	92
Other person(s)	4%	137

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?
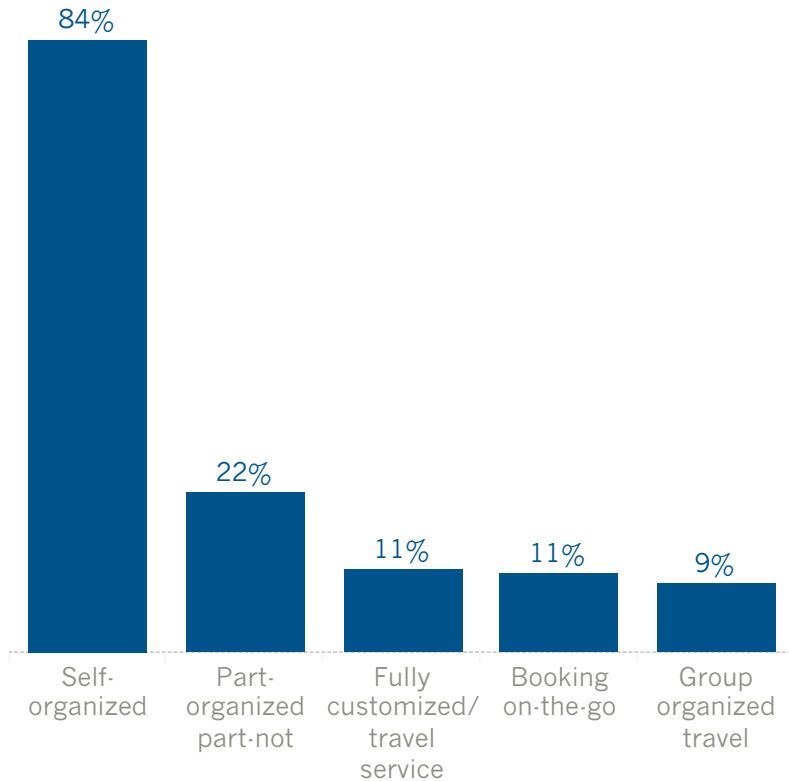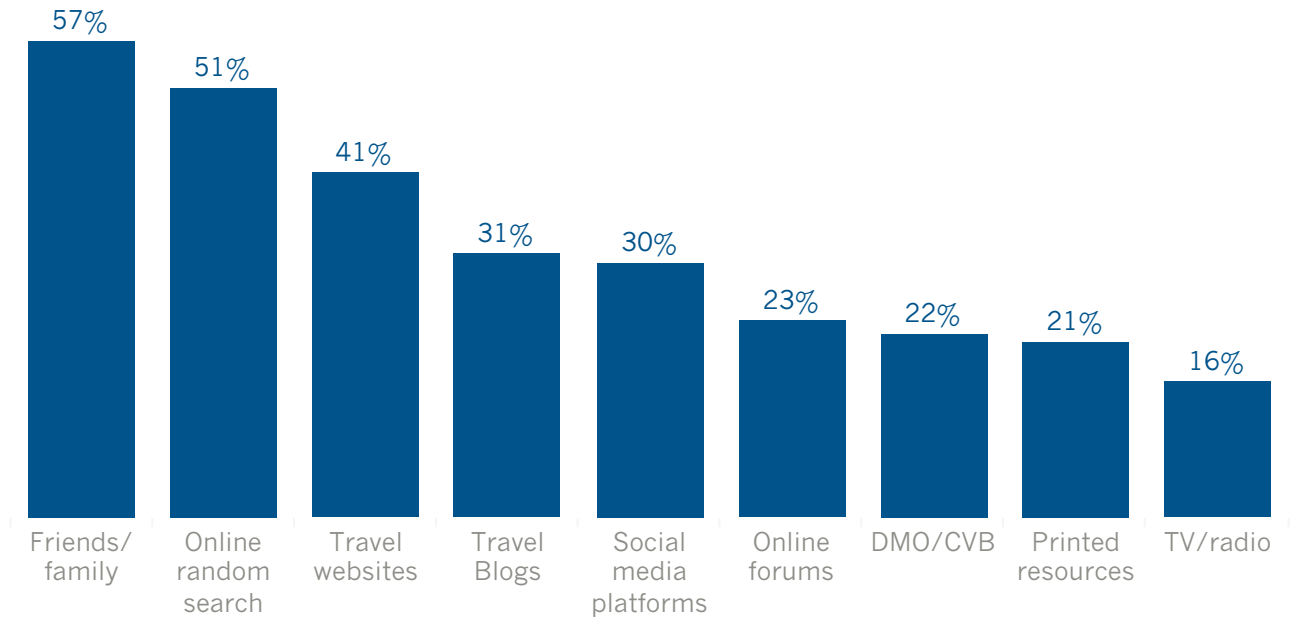
Source: YouGov (2023)

Organizing/Planning Methods

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

Germany

Organizing Travel

- Self-organized: 84%
- Part-organized part-not: 22%
- Fully customized/travel service: 11%
- Booking on-the-go: 11%
- Group organized travel: 9%

Planning Methods

- Friends/family: 57%
- Online random search: 51%
- Travel websites: 41%
- Travel Blogs: 31%
- Social media platforms: 30%
- Online forums: 23%
- DMO/CVB: 22%
- Printed resources: 21%
- TV/radio: 16%

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?
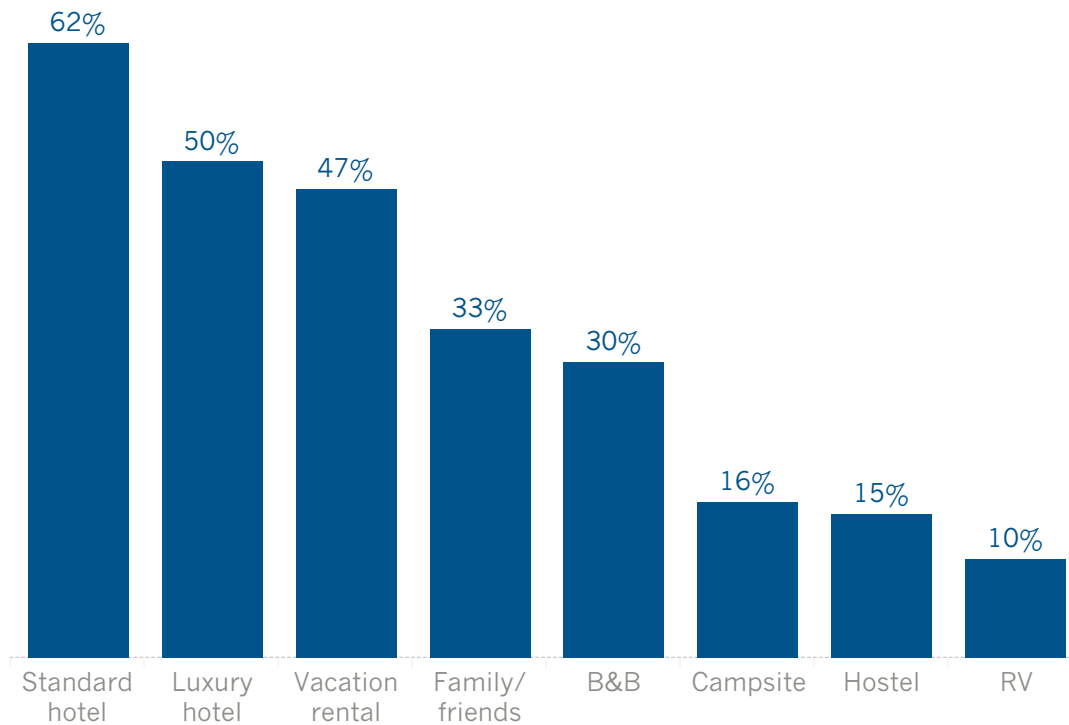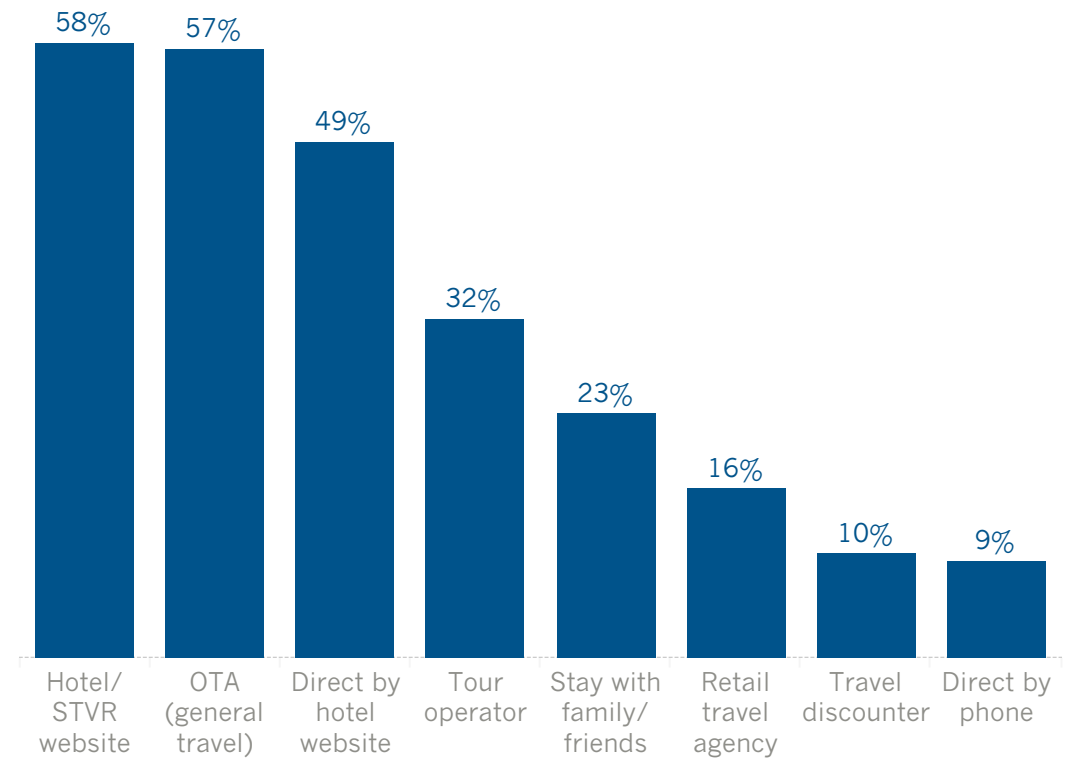
Source: YouGov (2023)

Booking Preferences

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

Germany

Accommodation Preferences

Category	Value
Standard hotel	62%
Luxury hotel	50%
Vacation rental	47%
Family/friends	33%
B&B	30%
Campsite	16%
Hostel	15%
RV	10%

Booking Preferences

Category	Value
Hotel/STVR website	58%
OTA (general travel)	57%
Direct by hotel website	49%
Tour operator	32%
Stay with family/friends	23%
Retail travel agency	16%
Travel discounter	10%
Direct by phone	9%

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?

Source: YouGov (2023)

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)

CA Traveler Target
- 24% (Low spenders)
- 54% (Medium spenders)
- 22% (High spenders)

Int'l Leisure Traveler
- 30% (Low spenders)
- 54% (Medium spenders)
- 16% (High spenders)

Legend:
- Low spenders
- Medium spenders
- High spenders
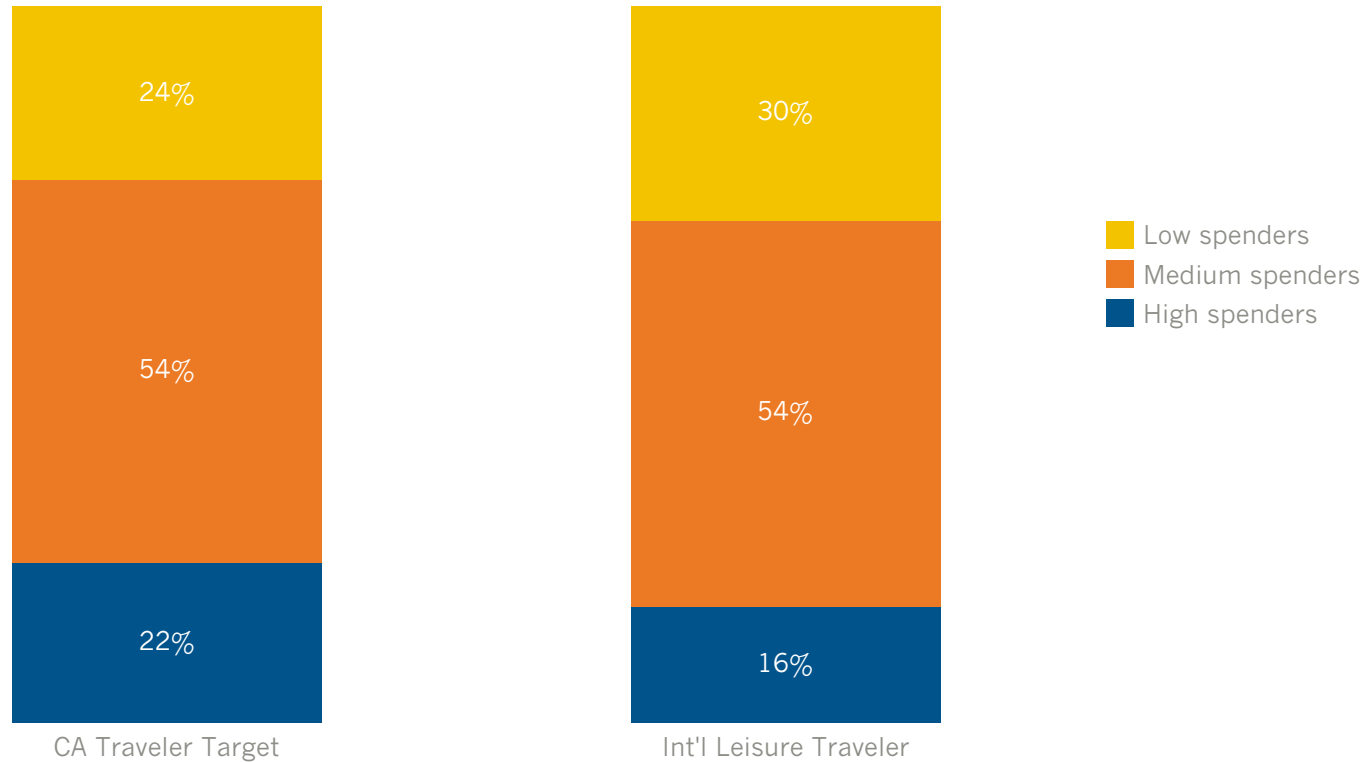
Media & Advertising

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	49%	136
Travel websites	41%	130
Online streaming services	35%	140
TV · Free to view channels	33%	130
Billboards	29%	134
Radio	23%	126
Magazines (digital)	23%	139
Local newspaper (physical)	22%	107
Public transport	21%	150
Cinema	20%	153
Direct mail	20%	105
Magazines (physical)	19%	116
Local newspaper (digital)	18%	116
Podcast	18%	177
TV · paid/subscription	17%	149
National newspaper (digital)	16%	138
National newspaper (physical)	15%	139

Sports Watched/Followed

	CA Traveler Target	Index
Soccer/Football	39%	118
NFL	16%	235
Tennis	13%	121
Basketball	12%	184
Athletics/Track & Field	11%	97
Ice Hockey	10%	129
Swimming	9%	122
Cycling	9%	116
Boxing	7%	119
Running/Marathon	7%	138
Volleyball	5%	140
Baseball	4%	221
Golf	3%	129
Horse Racing	3%	170
Gymnastics	3%	99
Surfing	2%	199
Rugby League	2%	218
Australian Rules Football	2%	295
Cricket	1%	142

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?

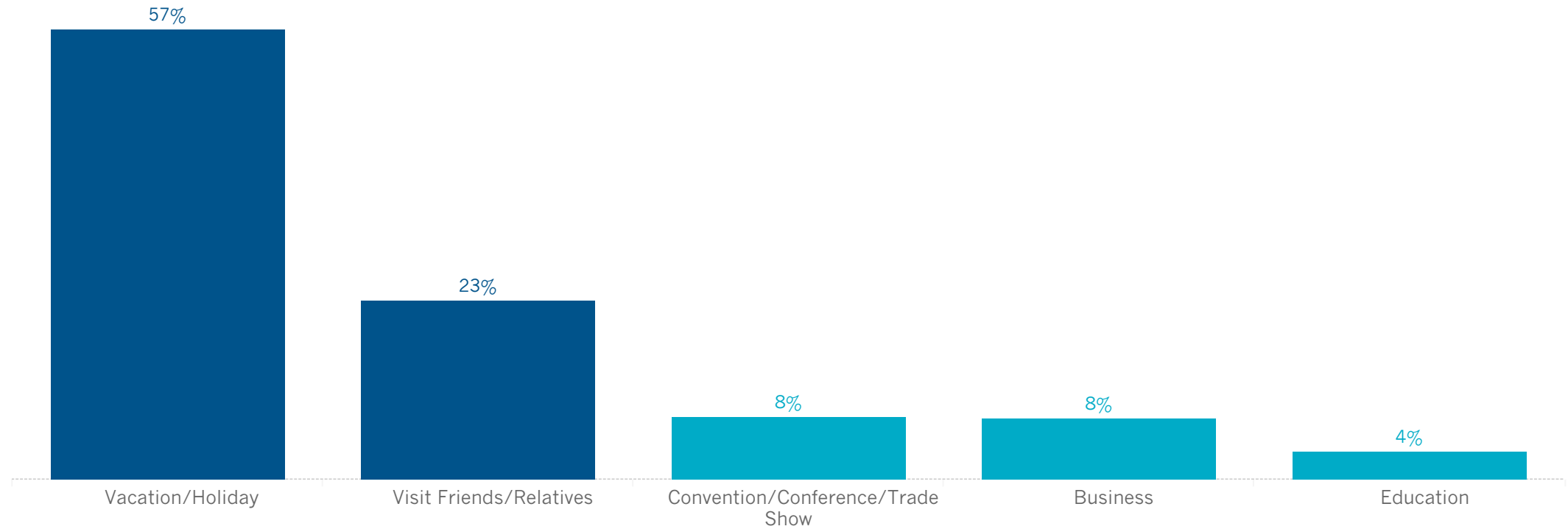California Travelers & California Trip Characteristics

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

Vacation/Holiday	Visit Friends/Relatives	Convention/Conference/Trade Show	Business	Education
57%	23%	8%	8%	4%

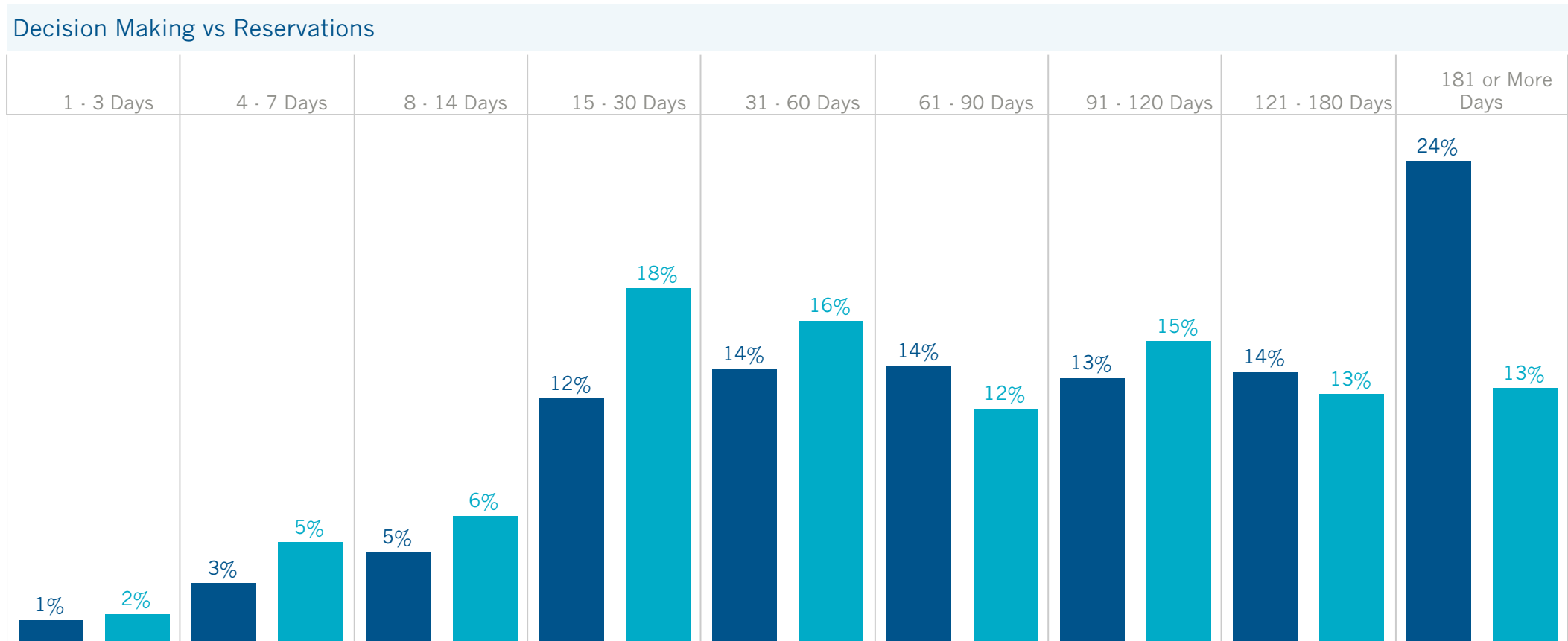Q. What was the main purpose of your trip?

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

Decision Making vs Reservations

	1 - 3 Days	4 - 7 Days	8 - 14 Days	15 - 30 Days	31 - 60 Days	61 - 90 Days	91 - 120 Days	121 - 180 Days	181 or More Days
Decision to travel	1%	3%	5%	12%	14%	14%	13%	14%	24%
Air travel reservations	2%	5%	6%	18%	16%	12%	15%	13%	13%

■ How many days prior to departure did you make the decision to travel?
■ How many days prior to departure did you make air travel reservations?

Source: SIAT 2022

Airline Reservations

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

Germany

Airline Reservations

Airline Reservations	Percentage
Directly with the Airline	56%
Internet Booking Service	27%
Travel Agency Office	17%
Tour Operator/Travel Club	2%
Corporate Travel Department	2%

Q: How were airline researvations made for this trip?

Source: SIAT 2022
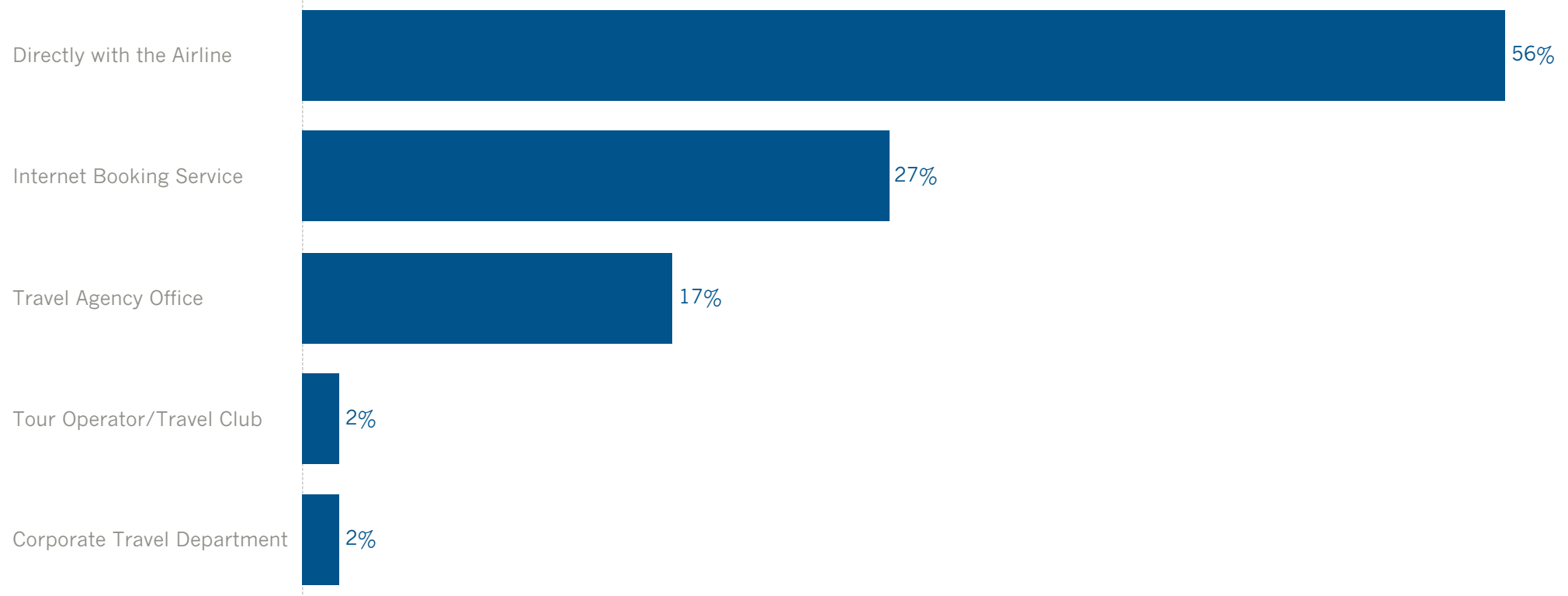
First/Repeat Visitation, Travel Party Size

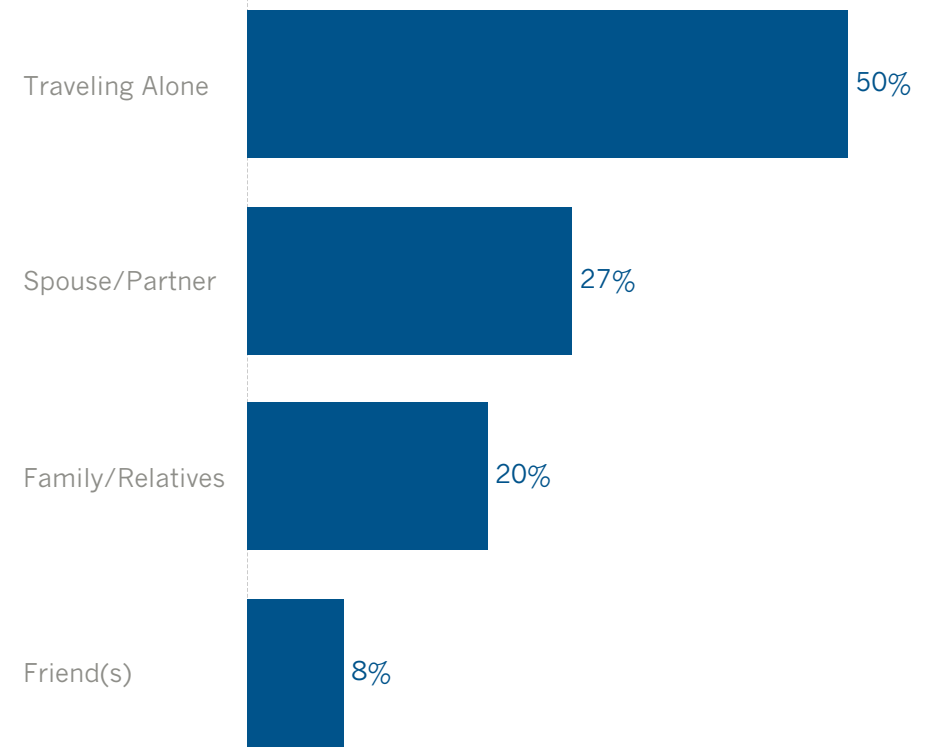The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

Leisure travelers

Germany

First trip to the US

25%

75%

- Yes
- No

Travel Companion

Traveling Alone — 50%

Spouse/Partner — 27%

Family/Relatives — 20%

Friend(s) — 8%
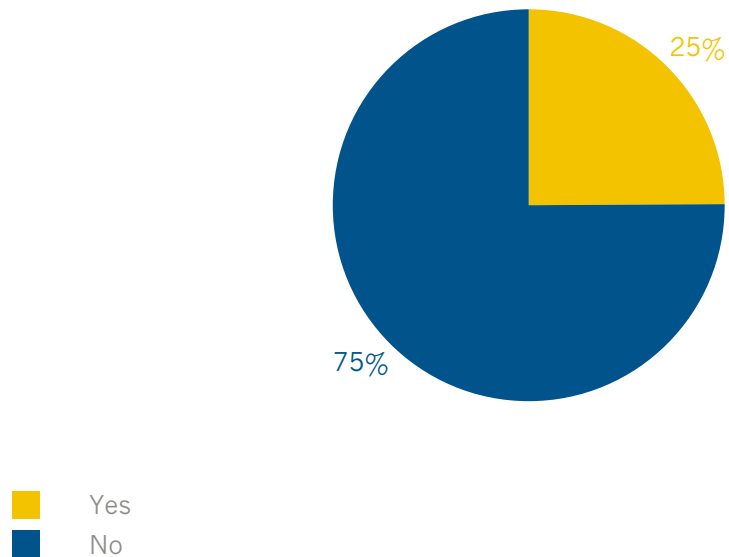
Q; Is this your first trip by air to the US?
Q: With whom are you travelling now?

Source: SIAT 2022

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

- Hotel or Motel, etc.: 72%
- Private Home: 33%
- Other: 12%

Nights in Destination

- 8-14 Nights: 40%
- 4-7 Nights: 30%
- 15-30 Nights: 17%
- 2-3 Nights: 11%
- 31+ Nights: 2%
- 1 Night: 0%

Leisure travelers

Q: Type of accomodations in the destination
Q: Overall nights in destination

Source: SIAT 2022
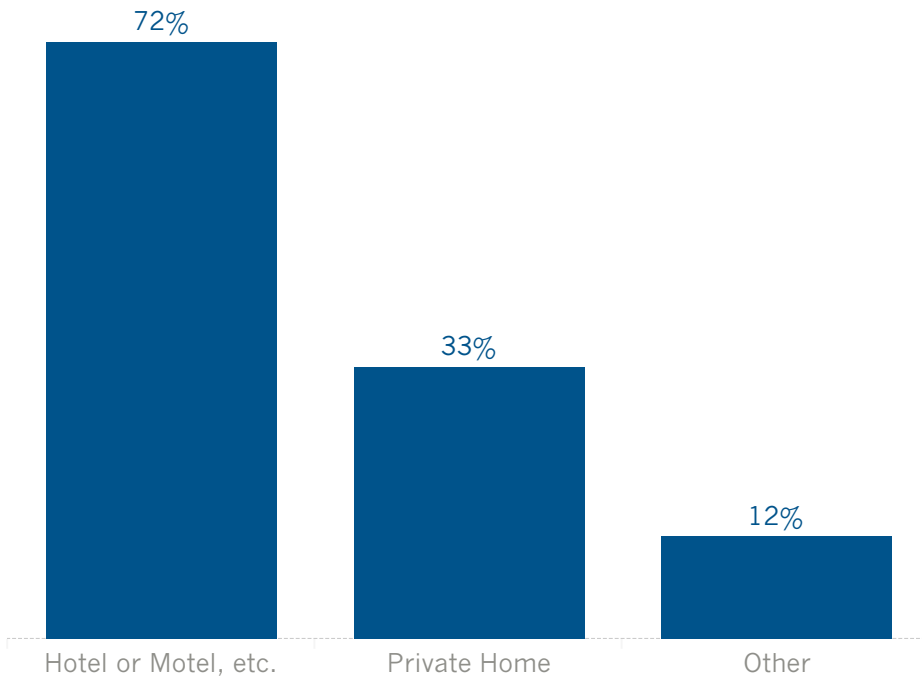
Destinations Visited

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

Leisure travelers

Germany

US Destinations visited

Destination	Percentage
Los Angeles-Long Beach	63%
San Francisco	50%
Las Vegas	42%
San Diego	20%
Flagstaff-G.Cyn-Sedona	18%
Monterey-Salinas	14%
Riverside-San Bernardino	11%
New York City	11%

Q: What U.S. Destinations did you visit (include main destination)?
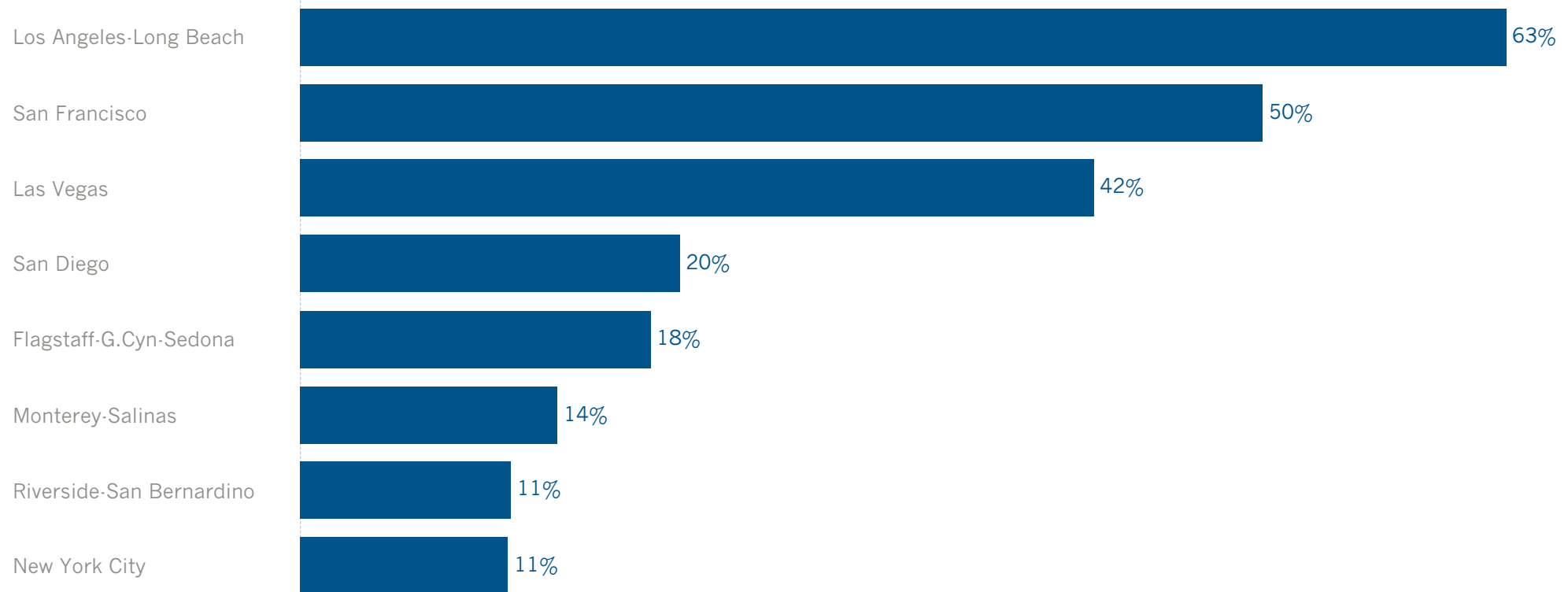
Transportation

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

Leisure travelers

Germany

Types of Transportation	
Rented Auto	56%
Auto, Private or Company	49%
City Subway/Tram/Bus	38%
Air Travel between U.S. Cities	33%
Ride-sharing Service	22%
Taxicab/Limousine	19%
Ferry/River Taxi/Srt Scenic Cruise	11%
Bus between Cities	10%
Rented Bicycle/Motorcycle/Moped	7%
Railroad between Cities	6%
Motor Home/Camper	5%
Cruise Ship/River Boat 1+ Nights	2%

Q: What types of transportations were used on this trip?

Source: SIAT 2022

Activities

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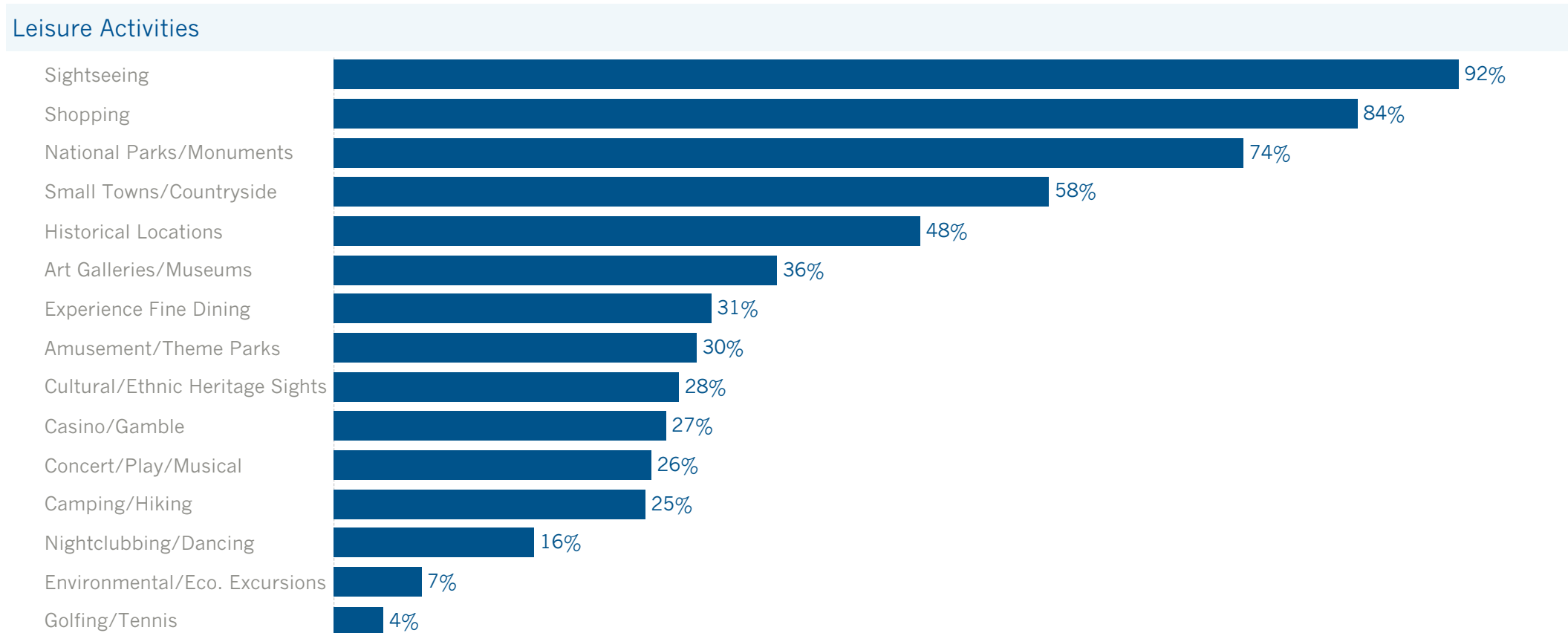
Germany

Leisure Activities	
Sightseeing	92%
Shopping	84%
National Parks/Monuments	74%
Small Towns/Countryside	58%
Historical Locations	48%
Art Galleries/Museums	36%
Experience Fine Dining	31%
Amusement/Theme Parks	30%
Cultural/Ethnic Heritage Sights	28%
Casino/Gamble	27%
Concert/Play/Musical	26%
Camping/Hiking	25%
Nightclubbing/Dancing	16%
Environmental/Eco. Excursions	7%
Golfing/Tennis	4%

Q: Did anyone engage in any of the following leisure activities?

Source: SIAT 2022

Expenditures in the US

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

Germany

Expenditures per visitor	
International Airfare	$1,184
Accommodations/Lodging	$724
Food and Beverages	$458
Entertainment and Recreation	$200
Ground Transportation	$169
Shopping, Gifts, and Other Purchases	$151
Additional Air Transportation	$133

Q. Mean expenditures per visitor/trip

Source: SIAT 2022