



# Manufacturing and Services

## Office of Travel and Tourism Industries

# 2007 Market Profile: Germany



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## Visitation Trends (Arrivals)

| [Thousands of German Visitors] | 2000  | 2001  | 2002  | 2003  | 2004  | 2005  | 2006  | 2007  | Change<br>2007/2000 |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|---------------------|
| Total Arrivals                 | 1,786 | 1,314 | 1,190 | 1,180 | 1,320 | 1,416 | 1,386 | 1,524 | -262                |
| Percentage Change (%)          | -10%  | -26%  | -9%   | -1%   | 12%   | 7%    | -2%   | 10%   | -15%                |

## Spending Trends (Exports)

| [Millions of U.S. Dollars]         | 2000    | 2001    | 2002    | 2003    | 2004    | 2005    | 2006    | 2007    | Change<br>2007/2000 |
|------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------------------|
| Total Travel & Tourism Exports (1) | \$5,123 | \$3,743 | \$3,935 | \$3,803 | \$4,687 | \$4,892 | \$4,205 | \$5,156 | \$33                |
| Travel Receipts                    | \$4,035 | \$2,936 | \$2,934 | \$2,953 | \$3,636 | \$3,810 | \$3,165 | \$4,007 | -\$28               |
| Passenger Fare Receipts            | \$1,088 | \$807   | \$1,001 | \$850   | \$1,051 | \$1,082 | \$1,040 | \$1,149 | \$61                |
|                                    |         |         |         |         |         |         |         |         |                     |
| Change (%) in Total Exports        | -10%    | -27%    | 5%      | -3%     | 23%     | 4%      | -14%    | 23%     | 1%                  |

## Information Sources Used for Trip Planning

| Information Sources Used<br>(multiple response: top 4 of 12) | 2006 | 2007 | % Point<br>Change (2) |
|--|------|------|-----------------------|
| Personal Computer  | 38%  | 41%  | 4 pts.                |
| Travel Agency  | 37%  | 29%  | -8 pts.               |
| Airlines Directly  | 23%  | 21%  | -2 pts.               |
| Corporate Travel Department                                  | 12%  | 18%  | 7 pts.                |

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## Main Purpose of Trip

| Main Purpose of Trip<br>(top 4 of 8) | 2006 | 2007 | % Point<br>Change (2) |
|--------------------------------------|------|------|-----------------------|
| Business/Professional                | 28%  | 35%  | 7 pts.                |
| Leisure/Rec./Holidays                | 37%  | 34%  | -3 pts.               |
| Visit Friends/Relatives (VFR)        | 24%  | 22%  | -2 pts.               |
| Convention/Conference                | 5%   | 5%   | 0 pts.                |

## All Purposes of Trip

| Purpose of Trip<br>(multiple response--top 4 of 8) | 2006 | 2007 | % Point<br>Change (2) |
|--|------|------|-----------------------|
| Leisure/Rec./Holidays                              | 52%  | 50%  | -2 pts.               |
| Business/Professional                              | 32%  | 37%  | 5 pts.                |
| Visit Friends/Relatives (VFR)                      | 36%  | 33%  | -3 pts.               |
| Convention/Conference                              | 8%   | 8%   | 0 pts.                |
|  |      |      |                       |
| NET PURPOSES OF TRIP:                              |      |      |                       |
| Leisure & VFR                                      | 72%  | 66%  | -5 pts.               |
| Business & Convention                              | 36%  | 41%  | 6 pts.                |

## Transportation Used in the United States

| Transportation Types Used in United States<br>(multiple response--top 5 of 8) | 2006 | 2007 | % Point<br>Change (2) |
|---|------|------|-----------------------|
| Rented Auto   | 41%  | 37%  | -4 pts.               |
| Taxi/Cab/Limousine  | 32%  | 33%  | 1 pts.                |
| Company or Private Auto   | 25%  | 30%  | 5 pts.                |
| City Subway/Tram/Bus  | 24%  | 25%  | 2 pts.                |
| Airlines in U.S.  | 25%  | 23%  | -2 pts.               |

# 2007 Market Profile: Germany

## Activity Participation While in the United States

| Activity Participation While in the U.S.<br>(multiple response--top 10 of 25) | 2006 | 2007 | % Point Change (2) |
|---|------|------|--------------------|
| Dining in Restaurants   | 85%  | 87%  | 3 pts.             |
| Shopping  | 84%  | 82%  | -2 pts.            |
| Visit Historical Places   | 46%  | 41%  | -6 pts.            |
| Sightseeing in Cities   | 37%  | 38%  | 1 pt.              |
| Cultural Heritage Sites   | 34%  | 35%  | 0 pts.             |
| Touring Countryside   | 33%  | 32%  | -2 pts.            |
| Art Gallery/Museum  | 28%  | 26%  | -2 pts.            |
| Visit Small Towns   | 29%  | 26%  | -3 pts.            |
| Visit National Parks  | 24%  | 23%  | -1 pt.             |
| Water Sports/Sunbathing   | 24%  | 19%  | -5 pts.            |

## Select Traveler Characteristics

| Traveler Characteristics               | 2006     | 2007      | Change (2) |
|--|----------|-----------|------------|
| Advance Trip Decision Time (mean days) | 95       | 81        | -14 days   |
| Advance Trip Decision Time (med. days) | 60       | 60        | 0 days     |
| Prepaid Package                        | 10%      | 7%        | -3 pts.    |
| First International Trip to the U.S.   | 24%      | 21%       | -3 pts.    |
| Length of Stay in U.S. (mean nights)   | 15.0     | 17.0      | 2 nights   |
| Length of Stay in U.S. (median nights) | 10       | 9         | -1 night   |
| Number of States Visited (% 1 state)   | 62%      | 62%       | 0 pts.     |
| Average Number of States Visited       | 1.7      | 1.6       | 0 pts.     |
| Hotel/Motel (% 1+ nights)              | 77%      | 78%       | 2 pts.     |
| Average # of Nights in Hotel/Motel     | 7.9      | 8.5       | 1 night    |
| Travel Party Size (mean # of persons)  | 1.4      | 1.4       | 0          |
| Gender: % Male                         | 65%      | 67%       | 2 pts.     |
| Household Income (mean average)        | \$98,200 | \$105,900 | \$7,700    |
| Household Income (median average)      | \$84,000 | \$97,700  | \$13,700   |
| Average Age: Female                    | 40       | 39        | -1 year    |
| Average Age: Male                      | 43       | 42        | -1 year    |

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## U.S. Destinations Visited (States, Cities, and Regions)

| Visitation to U.S. Destinations/Regions (3) | Market Share 2006 | Volume 2006 (000) | Market Share 2007 | Volume 2007 (000) |
|---|-------------------|-------------------|-------------------|-------------------|
| <b>REGIONS</b>                              |                   |                   |                   |                   |
| Middle Atlantic                             | 37.1%             | 514               | 43.6%             | 665               |
| South Atlantic                              | 31.5%             | 436               | 28.1%             | 428               |
| <b>STATES / TERRITORIES</b>                 |                   |                   |                   |                   |
| New York                                    | 31.4%             | 435               | 37.3%             | 569               |
| <b>CITIES</b>                               |                   |                   |                   |                   |
| New York City                               | 30.3%             | 420               | 35.9%             | 547               |

- (1) Total Travel & Tourism Exports = travel receipts (purchase of travel and tourism-related goods and services, to include food, lodging, recreation, gifts, entertainment, local transportation in the country of travel, and other items incidental to a foreign visit) + passenger fare receipts (fares paid to U.S. air carriers and vessel operators for travel between the United States and foreign countries and between two foreign points).
- (2) Percentage-point and percentage changes are based on non-rounded data.
- (3) Only census region, state, and city destinations having a sample size of 400 or more are displayed. Due to quarterly data weighting by country and port of entry, some unreported destinations may have a higher proportion of total than those reported.

Note: This profile shows only a portion of the 35 travel characteristics data reported on international arrivals to the United States. Additional information may be obtained for a fee. To learn more, please visit: <http://tinnet.ita.doc.gov/research/programs/ifs/index.html>.

For a list of the states that comprise each census region, please visit: [http://tinnet.ita.doc.gov/outreachpages/census\\_regions.html](http://tinnet.ita.doc.gov/outreachpages/census_regions.html).

Source: U.S. Department of Commerce, ITA, Office of Travel and Tourism Industries; Bureau of Economic Analysis.

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# Survey of International Air Travelers

The Survey of International Air Travelers (or “In-Flight” survey) provides a level of detail and insight into the traveler characteristics and travel patterns of international visitors to and from the United States not found elsewhere. Responses are weighted with data from the Department of Homeland Security and the following thirty-five tables are then populated. This report, which was constructed using just a fraction of the data available, summarizes what we know about the German traveler who visits the United States.

**Survey of International Air Travelers: Table Number and Description**

|          |                             |          |                               |
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