

## **Summary**

A German author by the name of Karl May planted the seed of "Indian" adventure in the hearts of Germans over a century ago. "The Adventures of Winnetou" lies on the shelves of every German household, and the greatest dreams of warriors and Pow Wows continue to live on in his stories.

The enthusiasm for Native American culture is not based on the slot machines of the grand casinos, but on the great wisdom and history of a nation that has survived for hundreds of years with a rich history of traditions, radiant sunsets and a life of lush American landscapes and abundant wetlands.

With an employment system that fosters travel activity and a yearly six-week vacation period on average, Germany is home to the world's greatest volume of travelers per capita. While the metropolitan attractions of New York and California continue to bring in the highest volume of German visitors, experienced visitors are in quest of cultural heritage and historical sites, water sports, and outdoor adventures.

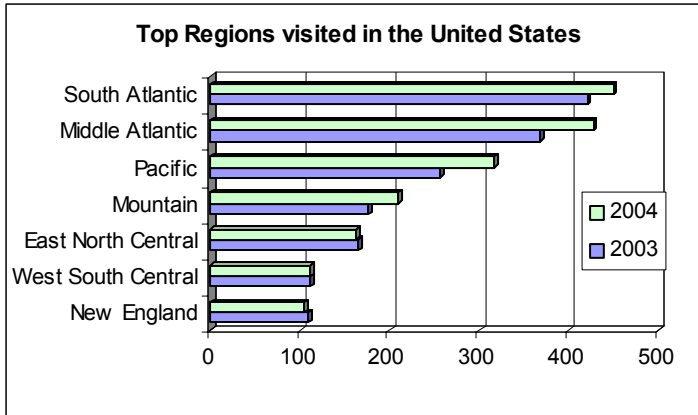
The wonder and fascination of May's "Indian" paradise has set the stage for a promising market, however the success of the Native American tourism industry in the German market depends on efforts of tour operators and travel agencies, travel laws and regulations, proactive outreach, and successful promotional and marketing strategies.

### **A. Market Trends and Highlights**

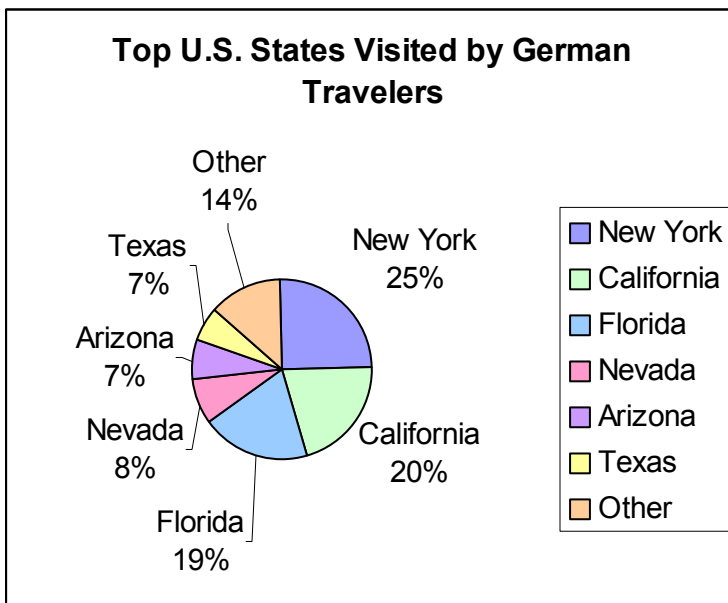
Travel agencies and tour operators report that individual traveler sales have increased, kindling growing interest in and awareness of independent traveling options and packages. In addition, the booking period has been lengthened considerably in order to facilitate long-term travel arrangements for group and family vacations, especially traveling overseas. The U.S. dollar continues to remain relatively low in comparison to the Euro, and henceforth signifies a heightening interest in incoming travel to the United States. Although the price tag of travel packages continues to play a dominant role in the tourism sector, agents and operators have stressed that travelers are also interested in a qualitative travel experience. Experienced travelers are concentrating on adventure/outdoor travel, steering away from the commercial, cosmopolitan cities and attractions of the United States. In a recent survey by the German travel trade magazine, *Touristik report*, 13 percent of German travelers interested in American travel destinations expressed an interest in the Native American culture. In general, Germans tend to place much emphasis on the Native American culture and lifestyle: the volume of Native American literature, clothing, art and travel opportunities continue to exemplify the importance of this culture in the German society and culture.

### **B. Competitive Analysis**

In 2004, roughly 18 million Germans traveled abroad, with 1.3 million traveling to the United States. The 11.7% growth rate in comparison to 2003 may be based mainly on inexpensive airfares, larger volume of direct flights to the United States, increased safety and security precautions, and a delayed booking effect generated by pent-up demand.



Source: Office of Travel & Tourism Industries, TD, ITA, USDOC



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In 2004, German travel visitors were most interested in the South Atlantic, Middle Atlantic and Pacific regions of the United States; visitation rates increased in comparison to the results of 2003. Regions that experienced a decline in the number of German visitors included the New England and East North Central region of the United States, along with a zero growth rate in the South West region of the United States. New York, California and Florida continued to be the most popular destinations for German travelers.

New Passport Requirements

Visa and traveling related issues have always been problematic for travel agents and tourism producers. However, German visitors traveling to the United States on business or vacation for a maximum period of 90 days must not apply for a visa. For a complete listing of other Visa Waiver Program (WVP) member countries, please refer to the U.S. Embassy website (listed below).

As of October 26, 2005, all newly issued passports must contain digital photos or the required chip (e-passport) that contains the biometric information about the traveler. Please note that all passports issued before this date are valid until the passport date

of expiration. Beginning October 26, 2006, all newly issued passports must contain a biometric identifier (e-passport). However, a passport issued prior to this date will remain valid until its expiration date.

Since June 26, 2005, the following policy has been implemented: all Visa Waiver Program visitors entering the U.S. must possess a machine-readable passport (MRP).

Please be aware of the changes listed above, and recognize that these policies may be modified at a later time.

For further information regarding passport and visa entry requirements, please visit the online websites: <http://usembassy.de> and <http://state.travel.gov>

#### German Traveler Profile

Despite a stagnating economy, traveling continues to play an important role in Germany. On average, Germans take vacation for roughly 6 weeks per year. In 2004, German visitors stayed an average of 20 days in the United States (German Market Profile 2004).

With Germany's central location in the heart of Europe, foreign destinations compete strongly for this market's business. The Mediterranean and North African countries continue to lead as the top destinations abroad.

The majority of travelers continue to rely on the expertise of travel agents in planning their travel plans, using both their online services and consulting services. German travelers take pleasure in trip planning and tend to plan long term. Thus, traveling decisions may take up to a year - hence the need to offer flexible booking plans, both for last-minute and long-term travelers.

Although travelers utilize the services of travel agents and operators, they continue to rely heavily on the travel guides such as Marco Polo and Vista Point, allowing them to work independently in conducting extensive research of prospective destinations. This planning process is an integral part of their vacation, which contributes to their enjoyment of the products and services offered.

#### ITB Native American Tourism Insight

At ITB (Internationale Tourismus Boerse), the world's largest travel trade fair, held every March in Berlin, Germany, representatives of the Native American tourism industry conducted informal question sessions with visitors to the See America Pavilion concerning this industry, i.e. the products and services that are most appealing.

Visitors expressed interest in having contact to Native Americans, attending traditional ceremonies, learning about the culture and history of Native Americans and hearing traditional songs and music. Furthermore, they found nature-oriented trips and cultural activities and experiences most attractive. Visitors preferred traditional accommodations and expressed no interest in the casino industry or gaming, as these products and services are already offered in Germany. Subsequently, individual tours were preferred over group tours with a booking period ranging anywhere from a few months to up to one year prior to the intended traveling date.

### Adventures in the Great Outdoors

Travelers want to escape the hectic life of the city, and enjoy the abundant landscapes of America. Boat tours, airboat rides, helicopter rides, guided and self guided tours through mountains and national parks are some examples of the types of attractions they want to experience.

German travelers also enjoy athletic activity; action packed excursions such as rafting through the canyons of the vast American terrain, or exploring the abundant mountain ranges are highly attractive. Germans want to follow the dinosaur tracks hidden within the red sandstone, enjoy a hike through the canyons and discover those caves and inclines that the National Geographic only writes about!

However, many apparently want to do much more than just take a dip in a freshwater river or a quick shower under a hidden waterfall in the mountains; they want to live the way the Indians once lived: Spend some time sleeping in a traditional dwelling, go horse back riding like a westerner, and most importantly, have the opportunity to live the adventures of Winnetou, the fictional hero of Karl May's stories.

### The "Traditional" Lifestyle

Germans tend to associate the Indian lifestyle with a paradise of homemade meals, arts and crafts, and the "historic" American life, i.e. fish hatchery on the reservation of rich and abundant wetlands, herbal and medicinal therapy, and enjoying great experiences, preserved by years of tradition and culture.

The image of the "simple life" entails more than the traditional services of the tribal community, but also the "western" lifestyle of rodeos, conversation and celebration.

Since German visitors' command of the English language can be limited, interpretive presentations, e.g. song and dance, sometimes foster more understanding than storytelling might with a domestic audience.

### Market Strengths

The Native American tourism sector has considerable strengths for the German market, which include cultural experience and participation as well as learning centers.

#### The Cultural Experience

While many travelers enjoy the idea of simply escaping, they also enjoy the cultural experience. They want to see Native Americans in their traditional clothing of vibrant colors and intricate patterns, learn the tribal dances of various tribes, attend an authentic Pow Wow event, hear stories over a campfire, and enjoy the drums and chants of the tribal community. Respectively, travelers do not only wish to be spectators, but also to partake in the action and fun of a culture that has been in existent for centuries: meet with the local artisans, see pottery and weaving demonstrations, and enjoy the traditional feasts of the Native American culture.

#### Learning Centers

Museums and monuments have always been a highlight for German travelers. History is the vehicle to learning any culture, it allows the tourist to see the very roots of the Native American culture, and hence to gain a more intensive understanding of the traditions and rituals that visitors enjoy so much.

In addition to national and local museums, travelers are also attracted to the tribal cultural centers in which they can learn Native American languages, crafts and skills, thereby enabling them to connect with the tribal people in a more profound way.

#### "Contra" Commercialism

Visitors are attracted to the Native American culture and outdoor experience, ergo commercialism continues to play a conflicting role in the successful promotion of Native American Tourism abroad.

Germans travel to the reservations and tribal villages to experience a different culture and lifestyle, live their bedsidestories, and avoid the "commercial" experience while, paradoxically, still expecting a certain level of comfort and service. Native American tourism producers marketing facilities such as all-in-one hotels with extravagant room decor, cable television, arcade and game rooms, pool facilities, casinos, lavish buffets and fun diners should note that this type of product will have limited appeal to the German "Native American enthusiast." However, this type of product may be suitable for inclusion in mainstream tour operator catalogs.

This segment of the industry attracts visitors who appreciate Native American tourism products because the services are very different from other attractions within the industry. During their stay, they want to enjoy a day of conversation with an Indian chief or retreat to a lodging facility that reiterates the natural and cultural themes of the environment, i.e. bed and breakfast stays, cabins with a fireplace and scenic view, or for the true enthusiasts, staying in a traditional dwelling. However, cable television and casino services tend to diminish what the German enthusiast perceives to be the cultural experience, thus driving away potential visitors.

#### Trade Promotion Opportunities

To succeed in the German market, Native American travel service providers should provide net rates, accept vouchers, give allotments and commission (of more than 10%), support marketing activities, work through receptive agents, keep partners updated and provide high resolution images. For more details on packaging for the German market, please contact your local U.S. Export Assistance Center.

Public relations work should target the independent travelers by promoting services in German-language travel literature. In addition to public relations work, press support is also pertinent in staying afloat in the German market. The *America Journal* has published several articles promoting the Native American culture, and continues to serve as a very important marketing tool in bringing German visitors to the United States. Attracting media and holding press conferences can always be useful in relaying Native American tourism information to the German public, hence attracting potential travelers. All of these activities should be done in close cooperation with multipliers such as regional tourism organizations, in-country destination representatives and local German public relation agencies.

#### Trade Shows and Conferences

Trade shows and conferences are also effective tools in gaining a more concrete understanding of the particular travel market, and further promoting travel and tourism products and services.

#### ITB

ITB (Internationale Tourismus Boerse) in Berlin is the world's largest travel trade show, which takes place annually in March. More than 10,000 exhibitors from 180

countries participated in the last ITB trade show, showcasing their products and services to over 84,000 trade visitors and 58,000 consumer visitors. The U.S. Commercial Service supports all U.S. exhibitors and conducts a special Native American cultural outreach program. The next ITB will take place from March 8-12, 2006, at the Berlin exhibition grounds. For more details refer to our International Market Insight ITB Berlin 2006 report available in the online market research library at [www.buyusa.gov](http://www.buyusa.gov).

#### American Indian Alaska Native Tourism Association Annual Conference

The American Indian Alaska Native Tourism Association Annual Conference offers participants, i.e. Native American tribes, federal agencies, and private businesses, the opportunity to discuss Native American tourism to establish future success for the entire industry. Furthermore, this conference serves as a great place to network collaboratively tribes and suppliers. The conference will take place from September 26-28, 2005 at the Seminole Hard Rock Hotel and Casino in Hollywood, Florida. German specialist tour operator Dr. Bertram Postner, American Indian Travel Center, will be a guest speaker at the U.S. Commercial Service sponsored International Marketing Workshops at the conference.

#### Go West Summit

The "Go West Summit" is a regional four day business event, in which American tourism industry professionals hold meetings and training exhibitions covering the western region of the United States, i.e. Arizona, Colorado, Kansas, Montana, Nevada, New Mexico, Oklahoma, Utah and Wyoming. Approximately 70-85 tour operators, including German tour operators, attend this event. Major products showcased include: resorts, accommodation, tourist ranches, national parks, activities and attractions, marketing products and services, and tourism offices and bureaus. This event will take place from February 1-4, 2006 in St. George, Utah. More information is available from participating states' tourism offices.

There are several other annual regional shows such as the Florida Huddle, Rhythms of the South, California Travel Mart, Discover New England Summit and one major international event run by the Travel Industry Association of America (TIA), the International Pow Wow. TIA will hold the next Pow Wow from May 6-10, 2006, in Orlando, Florida.

### **C. Market Access**

Native American Tourism producers should promote their services by working with receptive operators and tour operators, bringing services to the worldwide web, and providing flexible options for potential clients. German travelers tend to spend 3 or 4 weeks in the United States, and while the 1-3 week packages are attractive, 1-3 day packages could attract potential travelers looking for a change of pace in their traveling endeavors. Furthermore, Native American tourism products should be marketed in the German language in order to reach the independent travelers and trip planners.

#### Receptive Operators, Tour Operators and Packages

Receptive operators and tour operators are the best resources in further promoting and marketing travel and tourism products to the German market.

Receptive operators facilitate the overseas market for travel service providers in the United States. The expense can be a worthwhile endeavor if providers are able to market their services to the German market and German tour operators. New World

Travel, American Tours International, and Allied T Pro are three of the most well known receptive operators for the German market, however there are also numerous regional and local receptive operators.

German tour operators covering the Native American Tourism sector provide packages aimed at highlighting the eco-friendly and simple life of tribal communities. Presently, American Indian Travel Center, one of the two German tour operators covering the Native American tourism sector, showcases packages that include: Bed and breakfast packages, tipi and camping lodgings, aboriginal journeys, cultural journeys, marine wildlife adventures, swamp boating tours, workshops, outdoor sport excursions, and historical sites and attractions. These packages cover the following states: Arizona, Florida, Montana, New Mexico, South Dakota and Wisconsin, and are aimed at individuals traveling in small parties. "Begegnungsreisen," the other tour operator, promotes two group tours per year to the United States from Germany.

Travel packages are rather dynamic in that clients have an array of options: Outdoor adventure, culture experience, or a mixture of both, which enable customers to find an option that suits their preferences. Likewise, the length of stay can vary substantially from a day trip or a couple of days to up to 3-week stays. Accordingly, the price list varies with costs ranging anywhere from a few hundred dollars for several nights to up to two or three thousand dollars (per visitor) for lengthier excursions.

#### Consumer Protection and German Travel Law

German tour operators promoting Native American tourism continue to remain rather reluctant to cooperate with a majority of Native American tourism providers trying to enter the German market, due to the unfamiliarity of the latter with the German travel law and policies.

The German consumer travel protection law has been implemented in 1994 and affirms that German tour operators must offer the client proof in the form of a written guarantee that the package holiday price plus any return journey costs incurred in the event of bankruptcy are covered by a bank guarantee or insurance.

Furthermore, tour operators are obliged to deliver the trip exactly as described in the brochure. This law also holds German tour operators responsible for services provided by them through foreign agents. If, through the fault of tour operators or their agents, clients are not satisfied with or do not receive the service contracted, the clients may file suit against tour operators for damages.

Tour operators rely on Native American travel service providers to recognize and implement these travel service regulations in their programs. Travel packages may not be altered; weather-related problems and other complications that could influence the conditions of the travel packages should be considered prior to publishing package contents. In the event that alterations are made, the German tour operator may be obligated to incur all costs and fees and/or bear potential lawsuits.

#### Online Services and Dynamic Packaging

Tour operators are bringing their services directly to the worldwide web; providing customers in foreign markets with appropriate translations, market insight, and direct travel packages and accommodation services.

With double-digit growth in Internet activity, online booking proves to be a promising marketing vehicle for the tourism industry. Many of the most prominent tour operators and travel agents have already launched their services online and continue to invest heavily in this domain, i.e. establishing speedier checkouts and providing potential clients with multiple travel options and destinations based upon their previous selections and inquiries.

Dynamic packaging is also emerging online; Lastminute.com, a subsidiary of Travelocity, had a very successful year bringing in high sales for the year (June 2004-June 2005; FVW 22.07.05) and receiving plenty of attention from the travel magazines and publications.

#### Respecting Native Culture

All policies should be clearly stated on promotional material. Tour operators may not be aware that alcohol is prohibited on some reservations. In addition, photography restrictions and other such limitations, i.e. prohibiting visitation to burial grounds and sacred sites, religious and other sacred and spiritual ceremonies, should be noted in brochures and other travel literature.

#### Importers of Native American Handicrafts and Jewelry

The U.S. Commercial Service Germany has produced a separate report to cover information regarding these products. For more information concerning this report, please refer to the contact details at the end of this report.

#### **Conclusion**

German visitors want to relive their greatest childhood fantasies of "Indian" adventures and vibrant traditions. They want to take a break from their busy lives and enjoy the simplicity of the open country. However, they are meticulous planners, investing for the long term and will utilize the assistance and guidance of German tour operators and travel agencies. In spite of the small number of German tour operators, who promote Native American tourism, there is a market potential. With roughly half of the German population familiar with the Internet, world-renowned trade shows and the largest tour operators worldwide, the German market provides plenty of informative channels and opportunities for travel agents and tourism producers.

The Native American tourism industry must concentrate on the regulations and guidelines of German travel policies, promote and develop the German market, consider potential markets like family stays with Native Americans and Hands-on handicraft programs, and most notably, understand the German market, i.e. become personally familiar with the German tour operators and travel agencies and the receptive operators in the U.S. through whom they book their packages, the strict German consumer travel laws, and the commission rates and allotments.

#### The German Operators Specializing in Native American Packages

American Indian Travel Center  
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For more information on the Native American tourism promotional programs of the Rural Export Initiative of the U.S. Department of Commerce, contact:

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**For more information on Travel and Tourism and how the U.S. Commercial Service can assist US companies to develop their business market in the German market, contact:**

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