



Manufacturing and Services

Office of Travel and Tourism Industries

2008 Market Profile: Germany



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Visitation Trends (Arrivals)

[Thousands of German Visitors]	2001	2002	2003	2004	2005	2006	2007	2008	Change 2008/2001
Total Arrivals	1,314	1,190	1,180	1,320	1,416	1,386	1,524	1,782	469
Percentage Change (%)	-26%	-9%	-1%	12%	7%	-2%	10%	17%	36%

Spending Trends (Exports)

[Millions of U.S. Dollars]	2001	2002	2003	2004	2005	2006	2007	2008	Change 2008/2001
Total Travel & Tourism Exports (1)	\$3,743	\$3,935	\$3,803	\$4,687	\$4,892	\$4,205	\$5,156	\$6,496	\$2,753
Travel Receipts	\$2,936	\$2,934	\$2,953	\$3,636	\$3,810	\$3,165	\$4,007	\$4,998	\$2,062
Passenger Fare Receipts	\$807	\$1,001	\$850	\$1,051	\$1,082	\$1,040	\$1,149	\$1,498	\$691
Change (%) in Total Exports	-27%	5%	-3%	23%	4%	-14%	23%	26%	74%

Information Sources Used for Trip Planning

Information Sources Used (multiple response: top 4 of 12)	2007	2008	% Point Change (2)
Personal Computer	41%	47%	5 pts.
Airlines Directly	21%	28%	6 pts.
Travel Agency	29%	26%	-3 pts.
State/City Travel Office	17%	19%	2 pts.

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Main Purpose of Trip

Main Purpose of Trip (top 4 of 8)	2007	2008	% Point Change (2)
Leisure/Rec./Holidays	34%	45%	11 pts.
Business/Professional	35%	26%	-10 pts.
Visit Friends/Relatives	22%	21%	-1 pt.
Convention/Conference	5%	5%	0 pts.

All Purposes of Trip

Purpose of Trip (multiple response--top 4 of 8)	2007	2008	% Point Change (2)
Leisure/Rec./Holidays	50%	60%	10 pts.
Visit Friends/Relatives	33%	35%	2 pts.
Business/Professional	37%	28%	-9 pts.
Convention/Conference	8%	7%	-1 pt.
NET PURPOSES OF TRIP:			
Leisure & VFR	66%	75%	9 pts.
Business & Convention	41%	32%	-9 pts.

Transportation Used in the United States

Transportation Types Used in United States (multiple response--top 5 of 8)	2007	2008	% Point Change (2)
Rented Auto	37%	43%	6 pts.
Taxi/Cab/Limousine	33%	33%	0 pts.
City Subway/Tram/Bus	25%	25%	0 pts.
Company or Private Auto	30%	24%	-6 pts.
Airlines in U.S.	23%	23%	0 pts.

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Activity Participation While in the United States

Activity Participation While in the U.S. (multiple response--top 10 of 25)	2007	2008	% Point Change (2)
Dining in Restaurants	87%	85%	-2 pts.
Shopping	82%	84%	2 pts.
Visit Historical Places	41%	45%	4 pts.
Cultural Heritage Sites	35%	40%	6 pts.
Touring Countryside	32%	37%	5 pts.
Sightseeing in Cities	38%	36%	-1 pt.
Visit Small Towns	26%	31%	5 pts.
Art Gallery/Museum	26%	26%	0 pts.
Visit National Parks	23%	26%	3 pts.
Amusement/Theme Parks	18%	25%	7 pts.

Select Traveler Characteristics

Traveler Characteristics	2007	2008	Change (2)
Advance Trip Decision Time (mean days)	81	104	24 days
Advance Trip Decision Time (med. days)	60	80	20 days
Prepaid Package	7%	7%	0 pts.
First International Trip to the U.S.	21%	23%	2 pts.
Length of Stay in U.S. (mean nights)	17.0	16.4	-1 night
Length of Stay in U.S. (median nights)	9.0	11.0	2 nights
Number of States Visited (% 1 state)	62%	60%	-2 pts.
Average Number of States Visited	1.6	1.7	0 states
Hotel/Motel (% 1+ nights)	78%	79%	1 pt.
Average # of Nights in Hotel/Motel	8.5	9.1	1 night
Travel Party Size (mean # of persons)	1.4	1.4	0.0
Gender: % Male (among adults)	67%	64%	-3 pts.
Household Income (mean average)	\$105,900	\$110,800	\$4,900
Household Income (median average)	\$97,700	\$102,100	\$4,400
Average Age: Female	39	40	1 year
Average Age: Male	42	43	1 year

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

Visitation to U.S. Destinations/Regions (3)	Market Share 2007	Volume 2007 (000)	Market Share 2008	Volume 2008 (000)
REGIONS				
Middle Atlantic	43.6%	665	40.4%	720
South Atlantic	28.1%	428	33.0%	588
Pacific	* *	* *	23.9%	426
STATES				
New York	37.3%	569	34.9%	622
Florida	* *	* *	16.5%	294
CITIES				
New York City	35.9%	547	33.1%	590

(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.

(**) Estimate not shown due to sample size fewer than 400 for this year.

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.

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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- U.S. Travel and Tourism Satellite Accounts
- Canadian Statistics
- Travel Barometer

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