



**U.S.
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German Market for Travel

- **Economy** – What is the outlook?
- **German Travelers** – What makes Germans special?
- **Booking Channels** – How do German travelers book?
- **Covid-19** – How has German travel industry structure changed?
- **International travel** – What's the German perspective?
- **Messaging** – How to keep the United States front-of-mind?
- **Resources** – How to tap into existing expertise when you need it?



Economy – What is the outlook?

- Population: 83.2 million
- World's fourth largest economy
- Europe's largest economy
- 1/4 of the EU's GDP
- German Gov Pandemic Support for businesses
- Omikron variant cause for uncertainty





German Travelers – What makes Germans special?

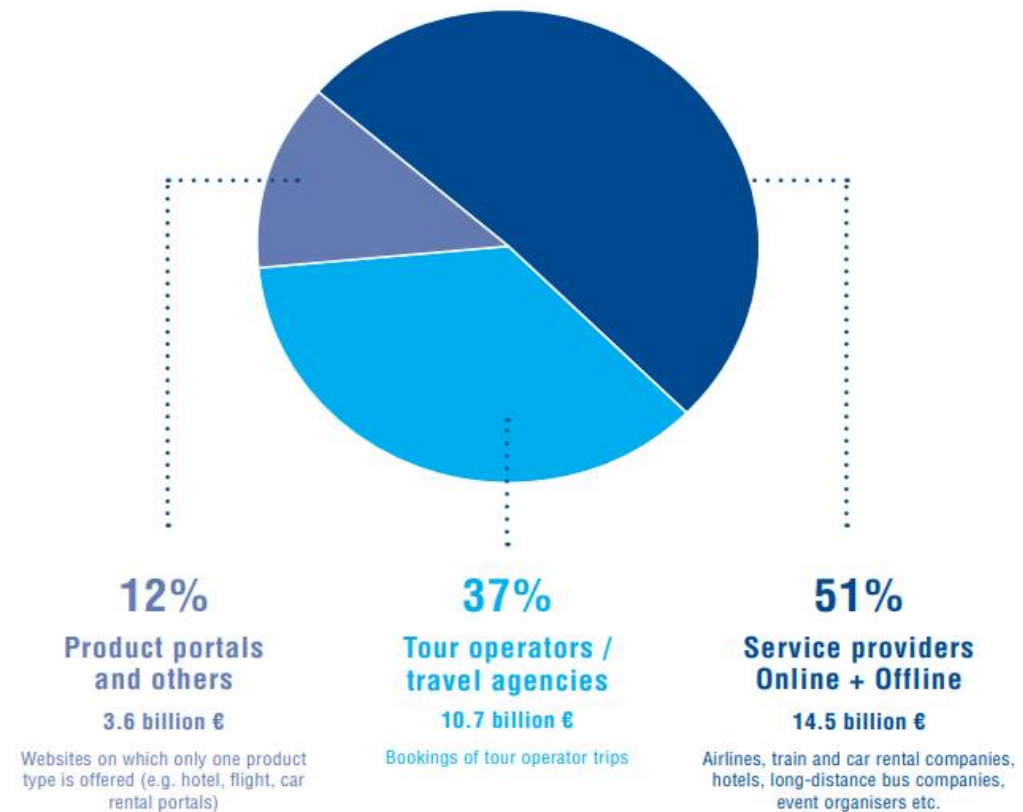
- Financially stable
- Six weeks of paid leave & 10+ public holidays
- Risk averse
- Long-term planners
- Open to new experiences
- Geographically dispersed travel patterns
- Keen and autonomous travelers
- Cash is king
- Value for money
- Environmentally conscious





Booking Channels – How do German travellers book?

Market structure in the
GERMAN TOURISM MARKET
2021



Source: [DRV – The German Travel Market](#) (2022)



Covid-19 – How has the Pandemic changed German travel industry structure?

Travel Agencies

- There was a total of 10,000+ travel agencies in Germany in 2019/2020, but the number decreased during the pandemic
- According to DRV, over 50% of tour operator packages are booked through travel agencies

Tour Operators

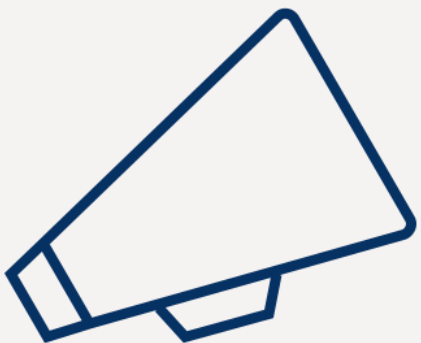
- In 2022, turnover generated by tour operators represents a market share of 33%
- Until 2019, there were 3,089 tour operators in Germany.
- All relevant tour operators for travel to the U.S. remain in business
- Tour operator packages remain the preferred booking option for long-haul trips



International Travel – What's the German Perspective?

- Recovered Covid patients with one vaccination dose are not eligible to travel und CDC regulations.
- Unvaccinated children traveling with vaccinated adults do not need to quarantine unless they test positive for Covid 3-5 days after arrival.
- Flexibility with cancellations will help with consumer confidence.
- Access is key, e.g. non- stop transatlantic flights.





Messaging – How to appeal to German visitors?

- Digital media is important to communicate product details and share experiences to motivate German travellers.
- Going to “Off-the-beaten-track”, remote, travel destinations is something of a German status symbol.
- Natural beauty and open spaces can be a selling point especially for New England with the Appalachian Mountains, lakes, beaches, forests and river valleys. This is likely to be more important in a post-covid world where visitors will try to avoid crowds.
- German travellers will want to know everything, all the nitty gritty details, and regular reinforcement of safety measures and procedures.
- Be packaged with a German tour operator or U.S. receptive.



Resources – How to tap into existing expertise when you need it?

- [ReiseVor9.de](#) – Daily travel and tourism newsletter in German
- [Deutsche Welle](#) – German news resource in English
- [FVW](#) – Subscription travel trade magazine with news in English
- [U.S. Commercial Service Germany](#) - Germany market information
- [National Travel and Tourism Office](#) - Dept. of Commerce research
- U.S. Export Assistance Center
[Providence](#), [Boston](#), [Portsmouth](#), [Portland](#)
- [Visit USA Committee Germany e.V.](#) - Website is in German



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