



It's like a
WHOLE OTHER COUNTRY

TEXAS TOURISM FY 2017 MARKETING PLAN

Germany

OVERVIEW:

Some key terms to note in 2017 are: individualization, traveling like a local, wellness and experiential luxury travel.

Payment by Smartphone will increasingly impact the travel industry as will a widespread use of mobile devices as essential travel tools in all phases of the holiday travel process – from planning and booking to on-site use once at the desired destination. That being said, Germany has seen a rise in the number of travel agencies indicating that many are now returning to using a live travel agent after ventures in online travel planning and booking.

Long-haul destinations choices are being influenced by factors such as the currency exchange rate and political tension, the USA is considered a safe destination with many of the younger travelers experiencing no language barriers. The senior population that take vacations is continuously growing, with nearly half of the retired Germans going on vacation in 2014. Not only does half of the total population expect the economic climate to stay as it is this year, the majority (55%) of Germans also believe their personal situation to remain stable as well.

There are direct flights from Frankfurt to DFW and Houston on American Airlines, Lufthansa, and United Airlines, as well as a direct flight from Munich to Houston on United Airways. Each Frankfurt and Munich flight operates daily. The direct flight from Frankfurt to Austin on Condor Airlines will extend the seasonal service in 2017 with increased flights from May through October.

VISITOR DATA:

An estimated 119,000 travelers from Germany visited Texas in 2015, an increase of 3.5% over 2014. This increase was preceded by flat growth in recent years, though the market is still performing above the ten year average for Texas market share. Travelers from Germany in 2015 stayed an average of 11.6 nights and generated \$106 million in direct spending. There are direct flights from Frankfurt to DFW and Houston on American Airlines, Lufthansa, and United Airlines, as well as a direct flight from Munich to Houston on United Airways. Each Frankfurt and Munich flight operates daily. Travel from Germany to Texas is forecasted to increase by 15.8% by 2020.

GERMANY TO TEXAS (2015)
Visitor Volume: 119,000
Direct Travel Spending: \$106 million
Avg Nights: 11.6

Arrivals from Germany to the United States were estimated at 2.27 million, an increase of 10% over the previous year. Germany has experienced steady growth over the past five years surpassing Brazil in total arrivals, though remaining behind China and the United Kingdom. Direct spending from Germany decreased by 8% to \$6.8 billion. Travel from Germany to the United States is forecasted to increase by 12% by 2020.

MARKETING ACTIVITIES:

Texas Tourism promotes the state's travel product directly to consumers through media and trade co-op marketing activities, with an ultimate goal of increasing both consumer awareness and demand for the destination. While packaged travel obtained from travel agents or directly from tour operators is still an important part of the German long-haul travel purchase process, the technologically advanced consumers have shown massive growth in online purchases in the last two years. Though they still book with trusted German travel entities, they now conduct research electronically. Because of this, Texas Tourism will support marketing efforts with tour operators and travel agents to increase Texas product offering and



It's like a
WHOLE OTHER COUNTRY

TEXAS TOURISM FY 2017 MARKETING PLAN

Germany

consumer knowledge of the destination, while maintaining a strong online branding presence with frequent consumer promotions. To achieve these goals Texas Tourism will coordinate travel show presence, sales and media missions, develop and coordinate co-op marketing opportunities, conduct travel agent training and host familiarization tours for travel trade and media.

Travel Trade Shows:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
ITB	March 8 -12, 2017	Berlin, Germany
IMEX – Frankfurt	May 16 – 18, 2017	Frankfurt, Germany
German Sales and Media Mission	Nov. 10-11, 2017	Frankfurt & Hamburg

Consumer Shows:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
f.re.e consumer show	Feb. 22-26, 2017	Munich, Germany

Travel Trade Training Events:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
Argus Reisen North America Day	September 2016	Hamburg, Germany
Visit USA roadshow	2017	Germany

Media Events:		
<u>Event</u>	<u>Date</u>	<u>Location</u>
Visit USA media event	Fall 2016	Munich, Germany
Visit USA ITB Media Breakfast	March 10, 2017	Berlin, Germany