

**Germany**  
*The travel destination*



German National Tourist Board

# Incoming-Tourism Germany

Edition 2008



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## Introduction

To coincide with the IMEX 2008 in Frankfurt/Main and the Germany Travel Mart (GTM) 2008 in Munich/Augsburg, the GNTB is publishing a summary of key facts and figures for incoming tourism to Germany. This publication is aimed at providing the GNTB's partners with a regular and up-to-date annual overview of the most important market research results for the previous travel year.

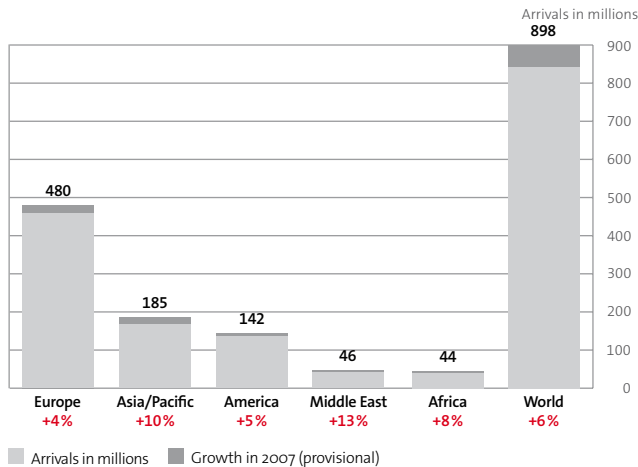
This edition is based on studies by the UNWTO, the WTTC and studies carried out by the GNTB's own business planning and market research department like the World Travel Monitor, TNS-Infratest, F.U.R. and data supplied by the Federal Statistical Office, international and national associations of tourism service providers.

## 10 strategic spheres of activity for Germany's Incoming Tourism

- 1 Strengthen the image of Germany as a travel destination
- 2 Generate tourism growth at the global level
- 3 Expand and integrate air, rail and road infrastructure for tourism
- 4 Secure position as premier business travel destination in Europe
- 5 Rise to the challenge of global socio-demographic change
- 6 Develop and exploit the cultural attractions of Germany for tourism purposes
- 7 Develop health-related tourism, particularly in the domestic market
- 8 Develop products and scenarios to cope with climate change
- 9 Promote greater internationalisation of cities and regions
- 10 Adopt multi-channelling strategy for global sales and marketing

## International tourism 2007

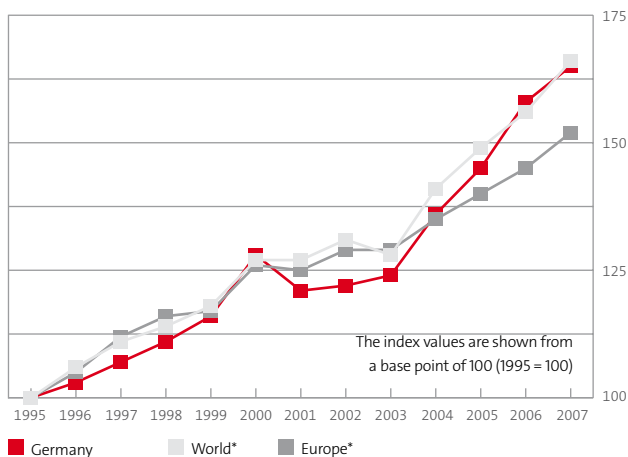
According to the UNWTO, 898 million (+ 6.1%) international arrivals were recorded in 2007



Source: UNWTO 2008 (1), provisional

## Development of international arrivals worldwide, in Europe and Germany

Germany has gained substantial momentum since 2003 and has experienced growth at the global average in 2007



Source: UNWTO 2008 (1), Federal Statistical Office 2008 (4) \*Provisional data for 2007

## Economic importance of tourism

### Contribution of Travel & Tourism economy 2008

Direct and indirect effects of tourism

Rank	Country	US-\$ bn
1	United States	1,442.8
2	China	508.6
3	Japan	438.1
4	<b>Germany</b>	<b>316.2</b>
5	France	307.0
6	Spain	276.7
7	UK	262.3
8	Italy	226.1
9	Canada	154.6
10	Mexico	130.2

Tourism Satellite Account (TSA)

The Travel & Tourism Economy identifies the broad impact of travel demand as it flows-through the economy. It consists of goods and services produced for visitors and other activities strongly dependent on Travel & Tourism spending, such as retailing and construction, which would decline if travel demand reduced.

Source: TSA / WTTC 2008 (2)

### Contribution of Travel & Tourism industry 2008

Direct effects of tourism

Rank	Country	US-\$ bn
1	United States	542.4
2	Japan	162.5
3	France	115.7
4	China	109.0
5	Spain	102.5
6	UK	97.0
7	Italy	94.0
8	<b>Germany</b>	<b>88.7</b>
9	Australia	46.3
10	Canada	45.8

Tourism Satellite Account (TSA)

The Travel & Tourism Industry identifies the narrower economic impact – goods and services directly for visitors, such as accommodation and transport. It is the narrower perspective of our activity which can be compared with other industries in the economy.

Source: TSA / WTTC 2008 (2)

### Employees / Capital Investment (CI) in the Travel & Tourism economy in 2008

Rank	Country	Employees (million)
1	China	74.5
2	India	30.5
3	United States	14.9
4	Japan	6.8
5	Mexico	6.6
6	Indonesia	5.9
7	Brazil	5.5
8	Vietnam	4.9
9	Russian Fed.	4.1
12	<b>Germany</b>	<b>3.6</b>

Source: TSA / WTTC 2008 (2)

Rank	Country	CI in US-\$ bn
1	United States	285.6
2	China	224.6
3	Spain	70.0
4	Japan	56.4
5	France	46.1
6	UK	45.9
7	<b>Germany</b>	<b>39.7</b>
8	Italy	38.9
9	Russian Fed.	38.4
10	Australia	35.7

Source: TSA / WTTC 2008 (2)

## Growth outlook for Europe / internet users in Europe

### Growth outlook for Europe

Tourism is one of the global growth industries of the future, with 3% forecast growth per annum to Europe

	Arrivals in million 1995	Arrivals in million 2010	Arrivals in million 2020	Annual growth % 1995-2020	Market share 1995	Market share 2020
Europe	336.0	527.0	717.0	3.1	59.8	45.9
America	110.0	190.0	282.0	3.8	19.3	18.1
East Asia/Pacific	81.0	195.0	397.0	6.5	14.4	25.4
Africa	20.0	47.0	77.0	5.5	3.6	5.0
Middle East	14.0	36.0	69.0	6.7	2.2	4.4
South Asia	4.0	11.0	19.0	6.2	0.7	1.2
World	565.0	1,006.0	1,561.0	4.1	100.0	100.0

Worldwide growth 2007: +6.1%

Source: UNWTO 2008 (1)

### Countries with the highest number of internet users in Europe

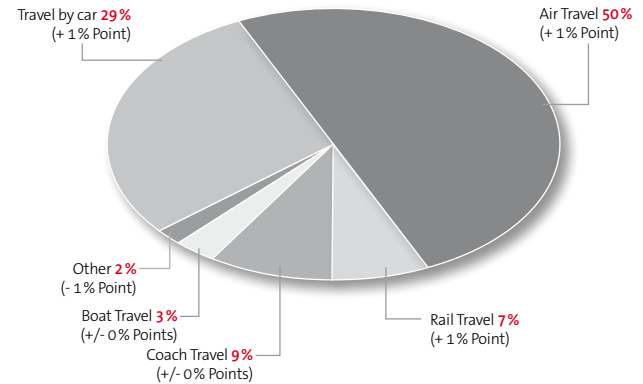
Ranking	Country	No. of users (million)	% of population
1	Germany	53.2	64.6
2	Great Britain	40.4	66.4
3	France	34.9	54.7
4	Italy	33.1	57.0
5	Spain	22.8	56.5
6	Netherlands	14.5	87.8
7	Poland	11.4	29.6
8	Portugal	7.8	73.1
9	Romania	7.0	31.4
10	Sweden	7.0	77.3
<b>Total 1 bis 10</b>		<b>232.1</b>	<b>59.8</b>
<b>Total EU</b>		<b>273.2</b>	<b>55.7</b>

Source: Internet World Stats 2008 (12)

## Modal split / hotel prices in Europe

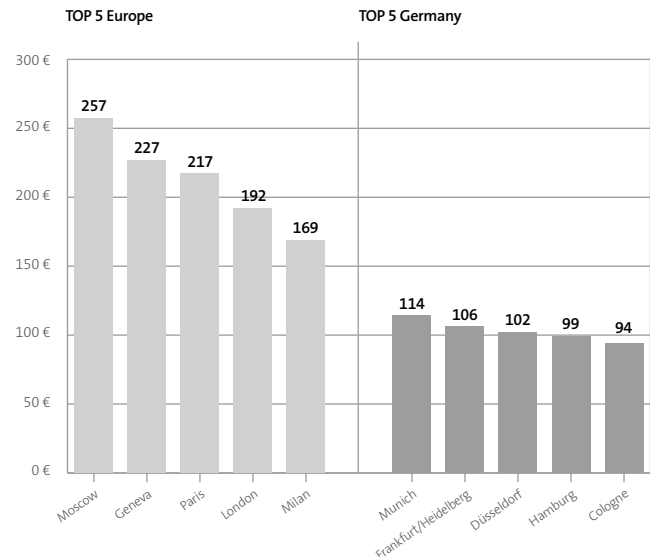
### Breakdown of international travel by Europeans according to form of transport in millions 2007

Travel by air and road are the dominant categories for travel throughout Europe. Total outbound trips by Europeans 2007: 409.3 million



Source: GNTB/WTM 2008 (5)

### Comparison of hotel prices in European and German cities 2007



Source: IHA/Deloitte 2008 (10)

## Incoming Tourism in Germany

### Germany

Capital	Berlin	
Federal states	16	
of which:		
Non-city states	13	
City states	3	
Member of UNWTO	since 1976	
Surface (1,000 sq. km)	357	
Population (million)	82.6	
Gross domestic product (2006 in Euro bn)	2,423.0	
GDP per capita 2007 (in Euro)	29,455	
Real GDP growth (in %)		
	2005	+0.8
	2006	+2.9
	2007	+2.5
<b>Economic importance of travel and tourism<sup>1</sup></b>		
Gross economic output of the travel and tourism industry		€ 185 bn
Value creation of the travel and tourism sector		€ 94 bn
Direct proportion* of GDP		3.2 %
<b>International arrivals 2007</b>		
International arrivals in thousands (incoming)		24,400
Arrivals per 100 of the population		30
<b>Travel and tourism in Germany 2007</b>		
Overnight stays by domestic travellers (thousands)		307,060
Domestic growth		+3.0 %
Overnight stays by international travellers (thousands)		54,779
International growth		+3.5 %
Total overnight stays (thousands)		361,839
Total growth		+3.0 %
<b>of which hotel/guesthouse</b>		
Overnight stays by domestic travellers (thousands)		170,234
Overnight stays by international travellers (thousands)		44,441
Total overnight stays (thousands)		214,675
<b>Number of hotel beds<sup>2</sup> (as of July 2007)</b>		
Utilisation of available hotel beds	(2006: 35.9 %)	36.7 %
<b>Outgoing travel 2007<sup>3</sup></b>		
Trips taken by Germans in thousands		296,900
of which trips abroad in thousands		75,900
No. of foreign trips per 100 of the population		63
<b>Travel and tourism balance of payments<sup>4</sup></b>		
Expenditure on travel and tourism	(07/06: + 3 %)	€ 60.5 bn
Income from travel and tourism	(07/06: +1 %)**	€ 26.3 bn
International balance of payments for travel and tourism	(07/06: + 4 %)	€ - 34.2 bn

<sup>1</sup> GWS on behalf of the Federal Ministry of Economics and Labour 2003, TSA-Base year 2000

<sup>2</sup> In hotels/b & b-hotels/inns/guesthouses year 2007 (according to Federal Statistical Office)

<sup>3</sup> GNTB/WTM 2008 (s)

<sup>4</sup> Deutsche Bundesbank (as of March 2008)

\* excl. business travel, travel to visit friends and family, public investment

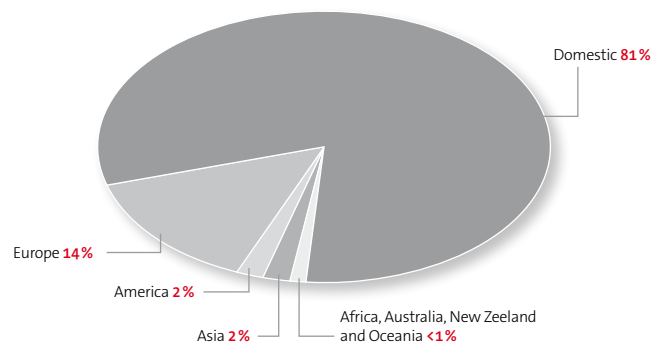
\*\* Increase after adjusting for the effect of the World Cup; the Bundesbank estimates the overall effect of the World Cup on travel-industry receipts in 2006 at around € 1.5 bn; if the World-Cup effect is removed from the figures for 2006, receipts rose by 7% in 2007

Source: Federal Statistical Office 2008 (4), GNTB 2008 (6)

## Incoming Tourism – importance and breakdown

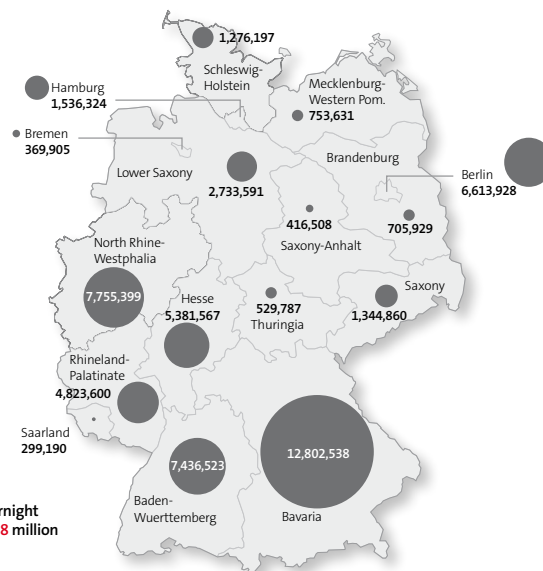
### Breakdown of all arrivals in Germany in 2007 by continent

81 per cent of arrivals in Germany in 2007 were domestic trips and 19 per cent were incoming trips



Source: Federal Statistical Office 2008 (4)

### Overnight stays in Germany by foreign visitors in 2007 by federal state

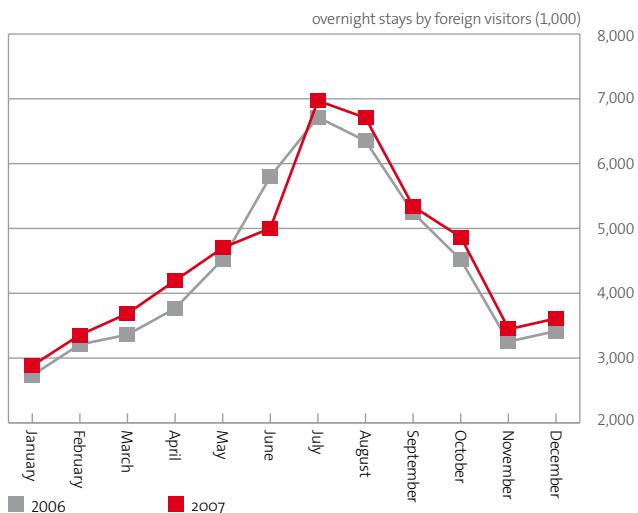


Total overnight stays: 54.8 million

Source: Federal Statistical Office 2008 (4)

## Seasonal breakdown / accommodation capacities

### Seasonal breakdown of overnight stays by foreign visitors travelling to Germany



Source: Federal Statistical Office 2008 (4)

### Capacities in Germany by type of accommodation 2007

Type of accommodation	Accommodation capacity	
	Establishments in operation (as of July 2007)	Share in %
Hotels	13,156	25.2
Bed & breakfast hotels	8,200	15.7
Inns	9,351	17.9
Guesthouses	5,234	10.0
<b>Traditional accommodation providers</b>	<b>35,941</b>	<b>68.9</b>
Leisure, recreational and training centres	2,784	5.3
Holiday centres	87	0.2
Holiday homes or apartments	10,600	20.3
Holiday cottages, youth hostels	1,728	3.3
Preventative medical clinics and rehabilitation clinics	941	1.8
<b>accommodation types*</b>	<b>52,168</b>	<b>100.0</b>

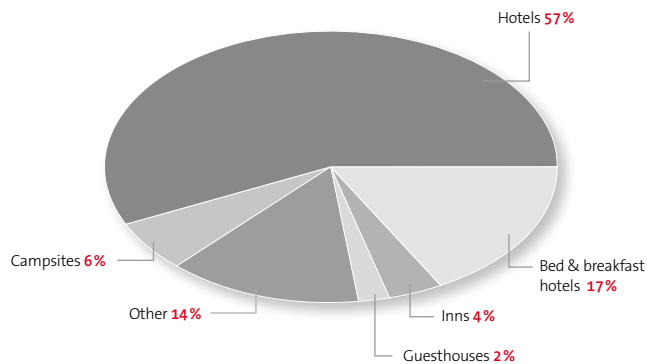
\*including 87 boarding houses (recorded for the first time in 2004)

Source: Federal Statistical Office 2007 (4)

## Types of accommodation / airports

### Overnight stays in Germany by foreign visitors in 2007 by type of accommodation

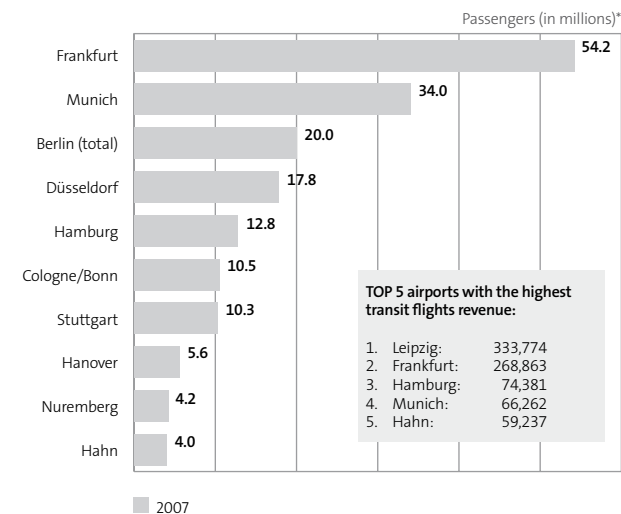
Hotels and bed & breakfast hotels: **74%** share of the market



Source: Federal Statistical Office 2008 (4)

### Traffic revenue at Germany's international airports increased by 6.0% in 2007

94% of the passenger volume of 184.7 million is allotted to the TOP 10 airports.

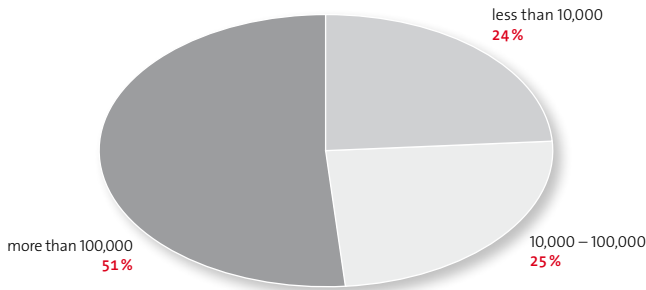


Source: ADV 2008 (14), \* incl. transit flights

## City breaks

### Breakdown of overnight stays in 2007 by foreign visitors in German towns and cities according to size

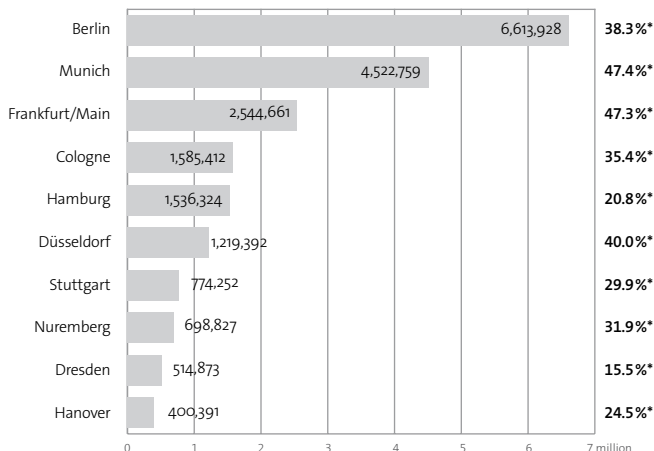
51% of overnight stays by foreign visitors are in towns and cities with a population of more than 100,000



Source: Federal Statistical Office 2008 (4)

### Top towns and cities in Germany in 2007 (overnight stays)

The 10 largest cities have a 37% market share of all overnight stays by foreign visitors in Germany



\*The percentage figures refer to the number of overnight stays by foreign visitors as a percentage of the total number of overnight stays (in each respective city)

Source: Regional Statistical Offices 2008 (11), GNTB 2008 (6)

## Business travel

### Business tourism / travel within the German tourism sector

Overview of market segments

Business trips (with overnight stay)	Day business trips (DBT)
72.8 m in Germany (2007)	315.4 m classic DBT
Spending: 39.0 bn Euro	122.6 m at seminars/trainings
Source: GNTB/TNS-Infratest	59.4 m at meetings/conventions
10.3 m guests from Europe (2007)	42.7 m at fairs/exhibitions
Spending: 8.4 bn Euro	Total: 540 m in Germany
1.5 m guests from overseas	Spending: 14.0 bn Euro
Spending: 5.3 bn Euro	Source: BMWI/DWIF
Source: GNTB/IPK	
<b>Total spending: 66.7 bn Euro</b>	

Source: GNTB 2008 (6)

### Trade fair locations / exhibitors

The six largest trade fair and exhibition centres in Germany in 2007 were:

Location	Indoor area (gross in m <sup>2</sup> )	Outdoor area (gross in m <sup>2</sup> )	Ranking within Europe
Hanover	495,265	58,070	1
Frankfurt/Main	321,750	83,700	3
Cologne	284,000	100,000	4
Düsseldorf	251,038	32,500	5
Munich	180,000	255,000	10
Berlin	160,000	100,000	12

as of November 2007

Source: AJUMA 2007 (8)

### The German conference and congress market

General overview

Supply	Demand	
Meeting and event venues	Events	2.8 m
Total <sup>1</sup>	Average duration	1.4 days
6,200	Meetings	64%
Convention and event centres (EC)	Events	36%
Meeting hotels (MH)	Total attendees	314.0 m
Special venues <sup>2</sup>	There of international	5.3%
1,611	Meeting attendees	123.9 m
Total meeting rooms	Event attendees	190.1 m
64,000		

<sup>1</sup> Sites with at least 100 seats in the largest room (theatre-style seating)

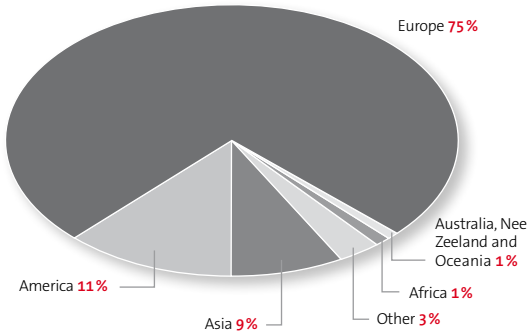
<sup>2</sup> Castle, monastery, museum, factory/depot, studio, theme park, zoo, educational site/ university, airport

Source: EITW 2008 (9)

## Source markets for Incoming Tourism

### Breakdown of overnight stays in Germany by continent

Europe has a growth rate of +5.3% in 2007 and an increasing market share



Source: Federal Statistical Office 2008 (4)

## Reasons for travel among Europeans

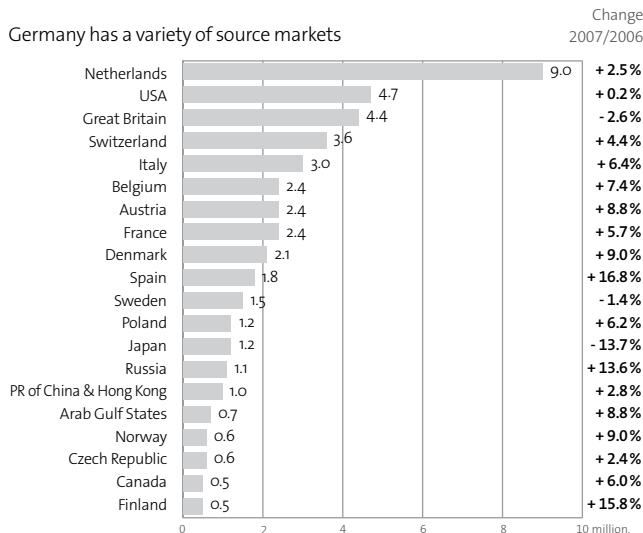
### Reasons for travel among Europeans travelling abroad and to Germany in 2007

Germany has a disproportionately large share of the international business travel market and is generating growing demand in the leisure sector

Reason for travel	Europe 2007 in millions	Germany 2007 in millions	Europe 2007 Percentage	Germany 2007 Percentage
Holidays	279.0	18.8	68%	53%
Short breaks of 1-3 nights	48.6	7.5	12%	21%
Longer holidays of 4+ nights	230.4	11.3	56%	32%
Visits to friends or relatives	30.4	3.1	8%	9%
Other travel	37.1	3.4	9%	9%
Business trips	62.9	10.3	15%	29%
<b>Total travel</b>	<b>409.3</b>	<b>35.6</b>	<b>100%</b>	<b>100%</b>

Source: GNTB/WTM 2008 (5)

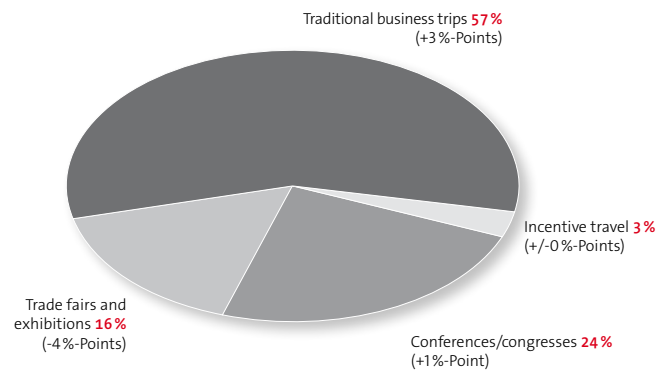
### Top 20 source markets for Germany by number of overnight stays in 2007



Source: Federal Statistical Office 2008 (4)

### Breakdown of European business travel volume into different types of business trips to Germany in 2007

Total volume: 10.3 million trips



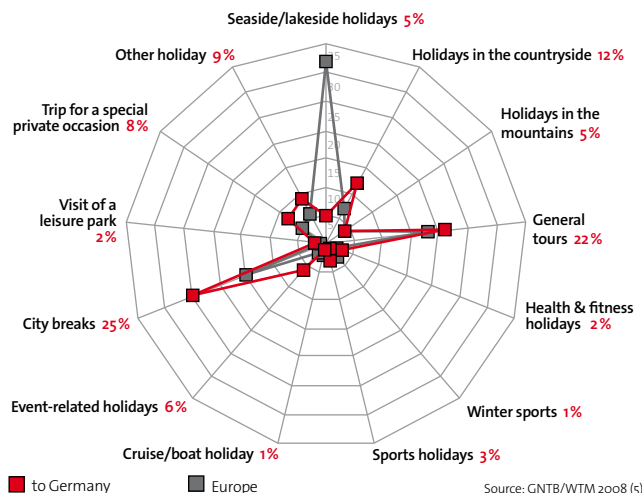
Source: GNTB/WTM 2008 (5)



## Holiday preferences among Europeans

### Ranking of holiday contents of Europeans in Germany 2007 as a percentage

In 2007 Germany's strengths lay in city/event breaks and general tours



## Source markets in Northwest / Southwest / Northeast Europe

### Source markets in Northwest and Southwest Europe

With a total of 27.1 million overnight stays in 2007, the source markets of Northwest and Southwest Europe have a nearly 50% share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2007	Overnight stays Forecast 2015	% of holidays taken abroad <sup>1</sup>	Population in millions <sup>2</sup>
<b>Northwest Europe</b>	<b>16,266,119</b>	<b>19,000,000</b>	<b>81.1</b>	<b>88.2</b>
Netherlands	8,996,531	9,500,000	113.3	16.4
Great Britain	4,412,579	5,600,000	68.2	60.8
Belgium	2,421,613	3,200,000	101.3	10.5
Luxembourg	435,396	700,000	167.0	0.5
<b>Southwest Europe</b>	<b>10,823,726</b>	<b>16,100,000</b>	<b>33.9</b>	<b>172.3</b>
Switzerland	3,603,045	5,500,000	135.7	7.5
Italy	3,036,460	4,400,000	26.5	58.9
France	2,351,218	2,900,000	34.1	61.7
Spain	1,833,003	3,300,000	25.2	44.2
<b>Total</b>	<b>27,089,845</b>	<b>35,100,000</b>	<b>50.0</b>	<b>260.5</b>

<sup>1</sup> 2006 data

<sup>2</sup> 2007 data

Source: Federal Statistical Office 2008 (4), GNTB 2008 (6)

### Holiday content for Europeans on city breaks in Europe and Germany

Content of city breaks 2007*	Total foreign city breaks by Europeans (frequency in %)	Rank	City breaks to Germany by Europeans (frequency in %)	Rank
Sightseeing	62%	1	62%	1
Enjoying atmosphere/ambience	49%	2	58%	2
Shopping	44%	3	54%	3
Enjoying food and drink	42%	4	50%	4
Visiting museums	40%	5	43%	5
Nightlife	25%	6	24%	8
Visiting parks/green areas	24%	7	28%	6
Visiting exhibitions	23%	8	26%	7

\* trips involving one or more overnight stay; excluding the motive of visiting friends or relatives

Source: GNTB/WTM 2008 (5)

### Source markets in Northeast Europe / Russia

With just under 7.4 million overnight stays in 2007, the source markets of Northern and Eastern Europe/Russia have a 13.5% share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2007	Overnight stays Forecast 2015	% of holidays taken abroad <sup>1</sup>	Population in millions <sup>2</sup>
<b>Northeast Europe/ Russia</b>	<b>7,390,934</b>	<b>9,400,000</b>	<b>18.4</b>	<b>212.4</b>
Denmark	2,131,938	2,500,000	104.7	5.4
Sweden	1,500,265	1,900,000	62.1	9.1
Norway	627,073	700,000	83.2	4.6
Finland	518,678	700,000	80.0	5.3
Poland	1,228,823	1,500,000	17.1	38.5
Russia	1,095,723	1,500,000	7.7	142.5
Baltic States	288,434	600,000	28.5	7.0

<sup>1</sup> 2006 data

<sup>2</sup> 2007 data

Source: Federal Statistical Office 2008 (4), GNTB 2008 (6)

## Source markets in Southeast Europe / travel arrangements

### Source markets in Southeast Europe

With a total of 3.8 million overnight stays in 2007, the source markets of Southeast Europe have about a 7% share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2007	Overnight stays Forecast 2015	% of holidays taken abroad <sup>1</sup>	Population in millions <sup>2</sup>
<b>Southeast Europe</b>	<b>3,753,682</b>	<b>4,800,000</b>	<b>56.0</b>	<b>35.9</b>
Austria	2,386,205	3,200,000	98.1	8.2
Czech Republic	585,149	700,000	45.7	10.2
Hungary	463,331	500,000	34.6	10.1
Slovenia	189,656	200,000	38.7	5.4
Slovakia	129,341	200,000	89.2	2.0

<sup>1</sup> 2006 data

<sup>2</sup> 2007 data

Source: Federal Statistical Office 2008 (4), GNTB 2008 (6)

## Source markets in America / Israel

### Source markets in America / Israel

With total 6.4 million overnight stays in 2007 the source markets in America and Israel have just under a 12 % share of all overnight stays in Germany by foreign visitors in Germany.

USA with a total of 4.7 million overnight stays in 2007 is the main overseas source market

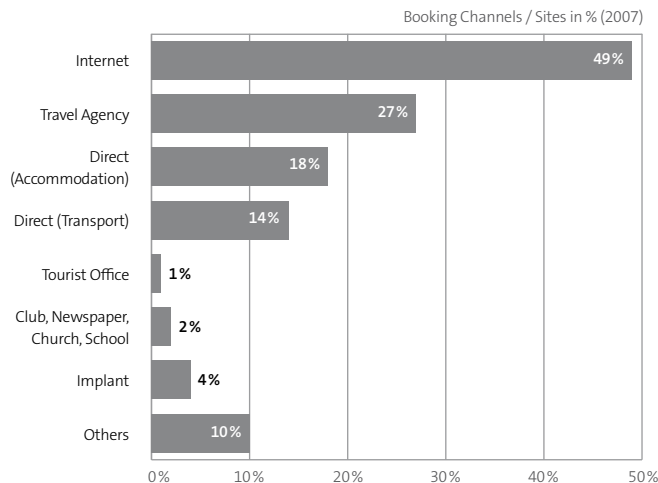
Markets	Overnight stays 2007	Overnight stays Forecast 2015	Population in millions <sup>1</sup>
<b>Total</b>	<b>6,417,225</b>	<b>8,000,000</b>	<b>912.2</b>
USA	4,661,543	6,100,000	305.8
Canada	531,179	700,000	32.9
Central-/South America	854,632	700,000	566.6
<b>America</b>	<b>6,047,354</b>	<b>7,500,000</b>	<b>905.3</b>
Israel	369,871	500,000	6.9

<sup>1</sup> 2007 data

Source: Federal Statistical Office 2008 (4), GNTB 2008 (6)

## Used booking sites of the Europeans when traveling to Germany

Germany must adopt a multi-channelling strategy in order to succeed against international competition

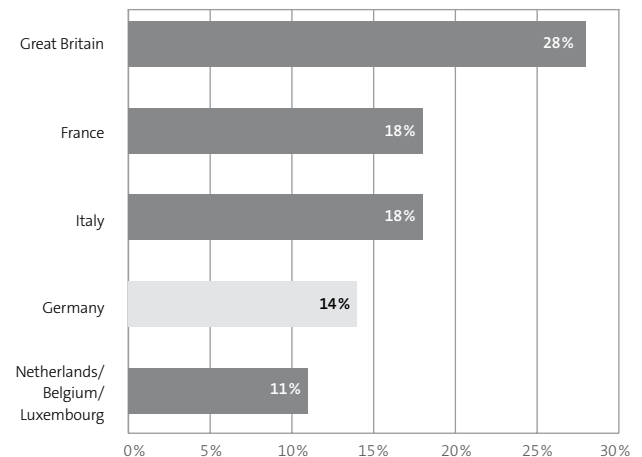


Multiple responses; only prebooked trips

Source: GNTB/WTM 2008 (5)

## Main travel destinations for US Americans in Europe

Total travel from the USA to Europe 2006: 12.0 million trips

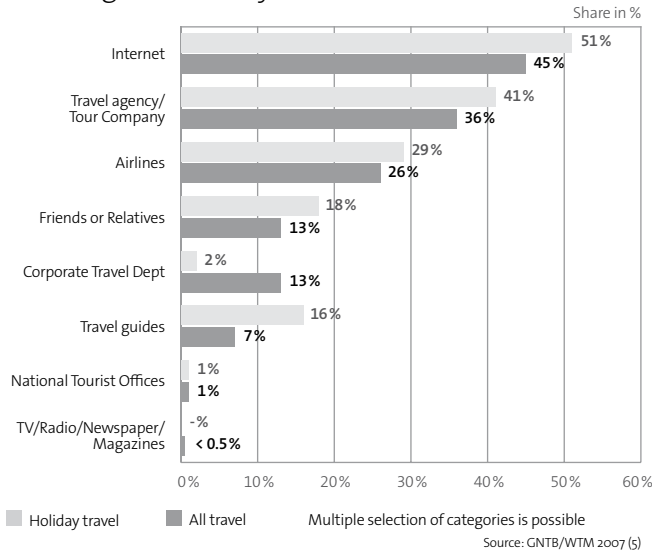


Multiple selection of destinations possible

Source: GNTB/WTM 2007 (5)

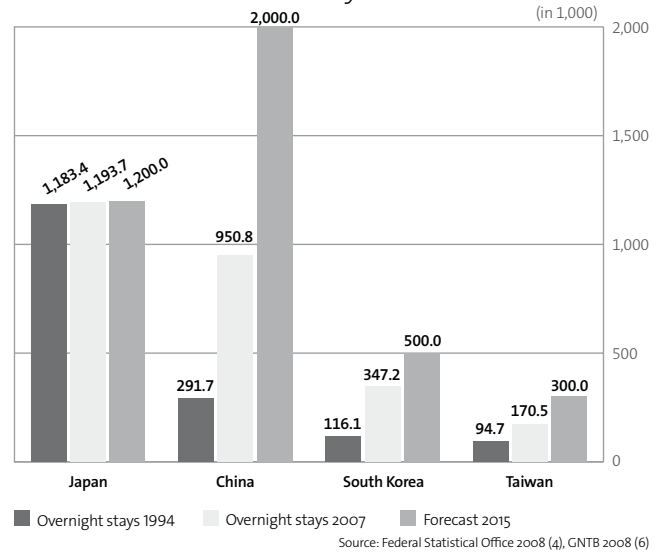
US source market

Information sources used by US Americans traveling to Germany

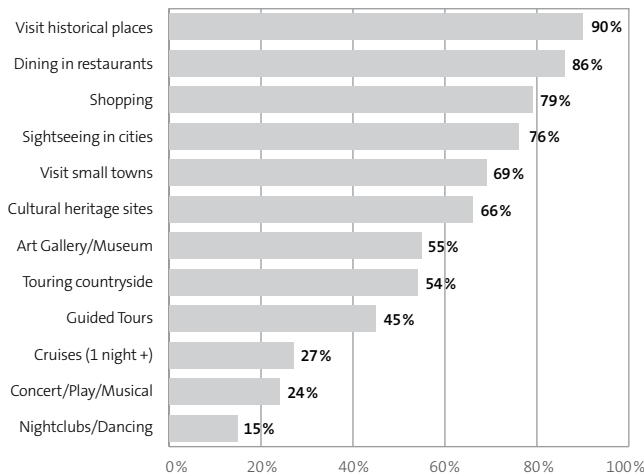


Asian source markets

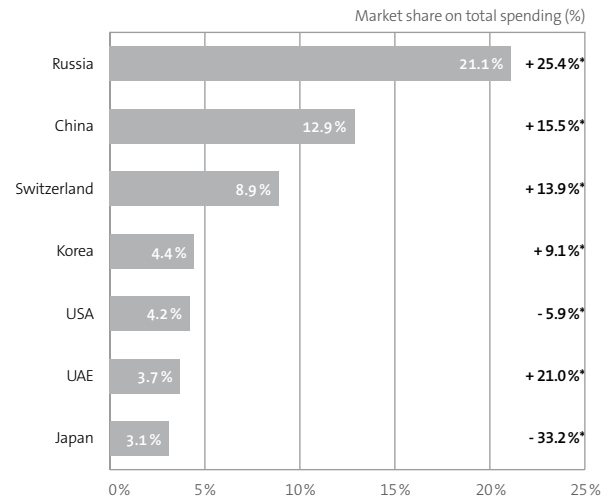
China will become the most important Asian source market for Germany in the near future



Holiday activities of US Americans in Germany



Russia, China and Switzerland are amongst the highest spenders for tax-free shopping in Germany



Other source markets / T & T Competitiveness Index

Source markets Asia, Africa and Australia

With total 52 million overnight stays in 2007 the source markets Asia, Africa and Australia have a share of about 10% of all overnight stays in Germany by foreign visitors

	Overnight stays 2007*	Overnight stays Forecast 2015*	Population* in millions <sup>1</sup>
<b>Total</b>	<b>5,165,668</b>	<b>6,500,000</b>	<b>4,954.7</b>
Japan	1,193,745	1,200,000	128.0
China/Hongkong	950,759	2,000,000	1,343.5
<b>Asia, Africa, Australia, New Zealand, Oceania</b>	<b>5,165,668</b>	<b>6,500,000</b>	<b>4,954.7</b>

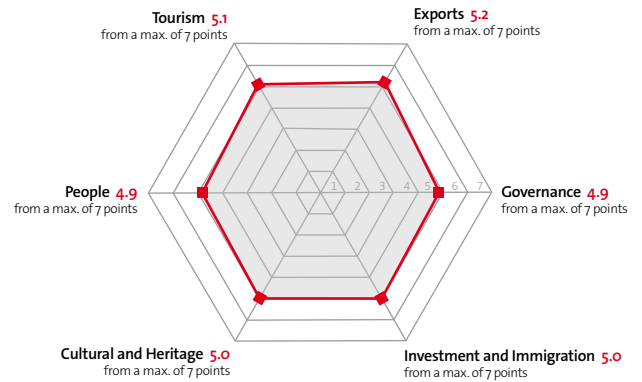
\* excl. Israel <sup>1</sup> data 2007

Source: Federal Statistical Office 2008 (4), DZT 2008 (6)

Germany in the world / GNTB growth outlook

Germany in the world

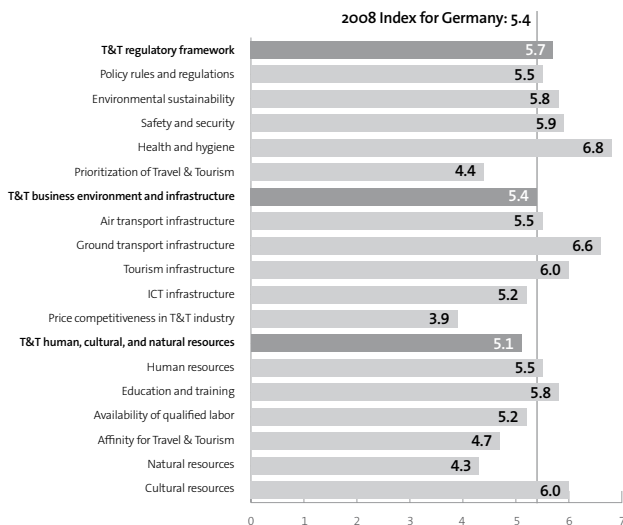
Tourism is one of six key locational factors for a country's image. On the demand side, Germany is 2007 the top location out of 36 countries – enduring success since the 2006 World Cup



Source: GNTB/Anholt-GMI 2008 (7)

Travel & Tourism Competitiveness Index

Germany is in third place\* in the world, behind Switzerland and Austria

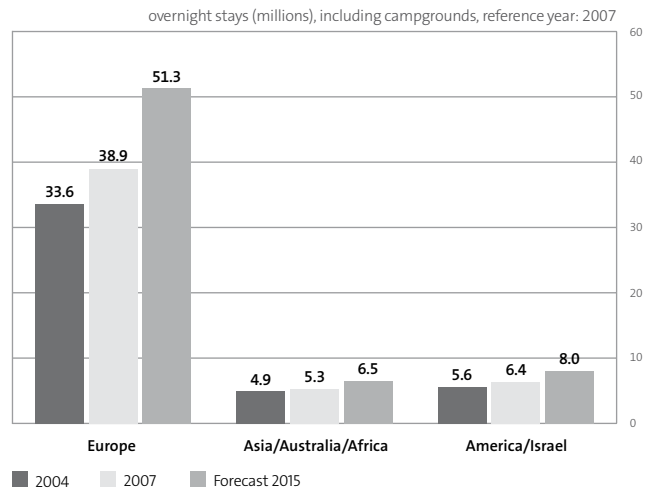


\* out of 130 countries

Source: World Economic Forum 2008 (3)

GNTB growth forecasts for 2015

Trough successful marketing Germany can net about 66 million overnight stays from abroad by 2015



excl. 4.0 million other overnight stays

Source: Federal Statistical Office 2008 (4), GNTB 2008 (6)

## German National Tourist Board

Working on behalf of the federal government, the German National Tourist Board, based in Frankfurt am Main, has been planning, coordinating and implementing activities for marketing Germany abroad for more than 50 years.

The aims of the GNTB with its 6 regional managements and its 29 foreign representative offices/sales and marketing agencies include:

- Strengthening the economic position of Germany
- Increasing the volume of tourism
- Increasing tourism exports

As a registered non-profit organisation, the GNTB is committed to transparency and efficiency rather than commercial gain.

### Sources

- 1 UNWTO World Tourism Organization, World Tourism Barometer 1/2008, Spain 2008
- 2 TSA/ WTTC World Travel and Tourism Council, The 2008 Travel and Tourism Economic Research, Country League Tables, UK 2008
- 3 World Economic Forum, Travel & Tourism Competitiveness Report 2008, Geneva 2008
- 4 Federal Statistical Office, Annual Reports and Monthly Reports 1995 to 2007, Wiesbaden 2008
- 5 GNTB/IPK-International, World Travel Monitor/ In-Flight-Survey, Malta 2008, USA 2007
- 6 GNTB Market Research, Frankfurt 2007, 2008
- 7 DZT/Anholt-GMI, Nation Brands Index 2007, USA 2008
- 8 Association of the German Trade Fair Industry (ALUMA), Messe Trend, Key Figures, Berlin 2007
- 9 Meeting- und Event Barometer of EITW commissioned by EVVC, GCB, GNTB; Wernigerode 2008
- 10 German International Hotel Association (IHA)/Deloitte, Hotelmarkt Deutschland (The German Hotel Market), Industry Report 2008, Berlin 2008
- 11 Regional Statistical Offices 2008
- 12 Internet World Stats, USA 2008
- 13 Global Refund Germany, Düsseldorf 2008
- 14 ADV (German Airports Association), Berlin 2008

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