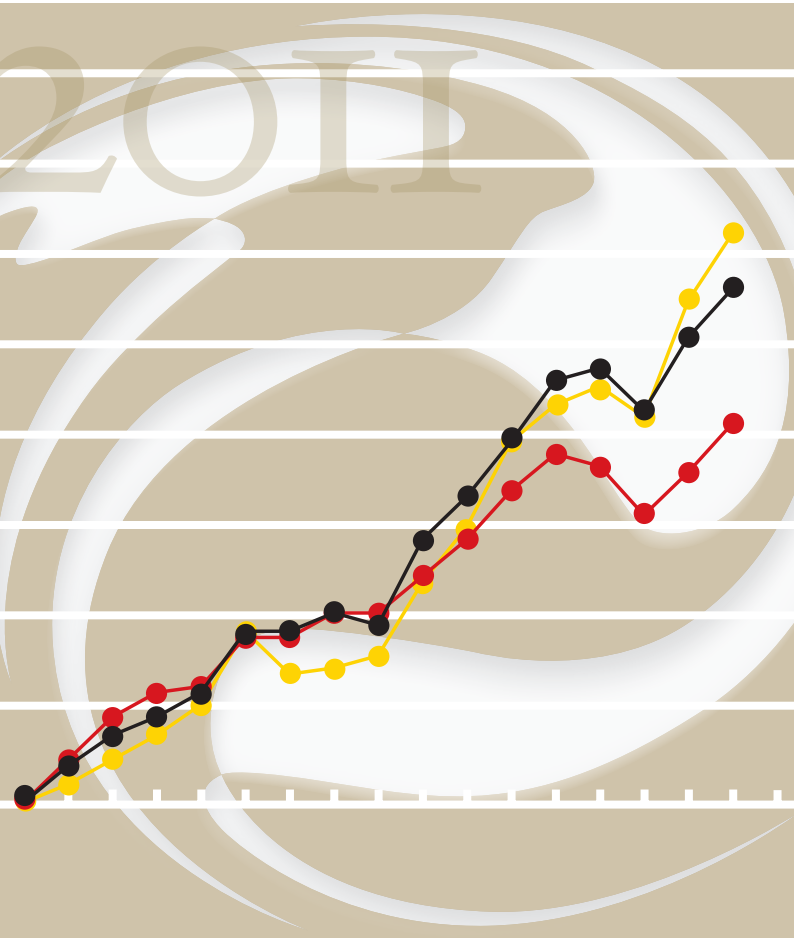




German National Tourist Board

# Incoming-Tourism Germany

Edition 2012



Facts and Figures 2011

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## Introduction

To coincide with the Germany Travel Mart (GTM) 2012 in the city of Leipzig, the GNTB is publishing a summary of key facts and figures for incoming tourism to Germany 2011.

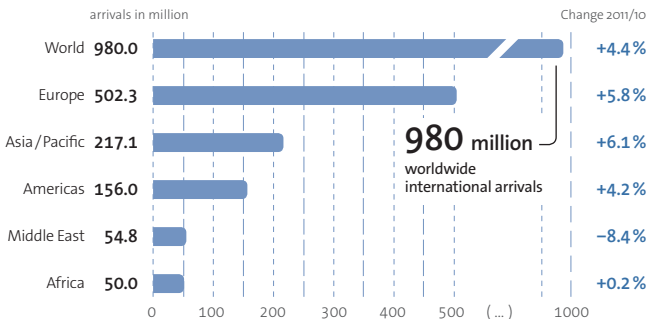
This publication is aimed at providing the GNTB's partners with a regular and up-to-date annual overview of the most important market research results for the previous travel year. This edition is based on studies by the UNWTO, EUROSTAT, the WEF and studies carried out by the GNTB's own business planning and market research department like from the World Travel Monitor, Quality Monitoring of German Tourism and data supplied by the Federal Statistical Office, international and national associations of tourism service providers.

### International tourism 2011

Source: UNWTO 2012 (1)

## Record number in world Tourism 2011: 980 million international arrivals

The destinations with the largest growth in international travel are Asia and Europe



worldwide growth  
forecast 2012:

**+3% to +4%**

Growth Outlook world tourism

Source: UNWTO 2012 (1)

## Growth Outlook for world tourism 2030

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 2011	Arrivals in million 2030*	Annual growth % 1995–2030	Market share 2011%	Market share 2030%*
<b>Europe</b>	<b>336.0</b>	<b>502.3</b>	<b>744.0</b>	<b>+2.3</b>	<b>51.2</b>	<b>41.1</b>
East Asia/Pacific	85.0	217.1	535.0	+4.9	22.1	29.6
Americas	110.0	156.0	248.0	+2.6	15.9	13.7
Middle East	14.0	54.8	149.0	+4.6	5.6	8.2
Africa	20.0	50.0	134.0	+5.0	5.1	7.4
<b>World</b>	<b>565.0</b>	<b>980.0</b>	<b>1,809.0</b>	<b>+3.3</b>	<b>100.0</b>	<b>100.0</b>

\* forecast

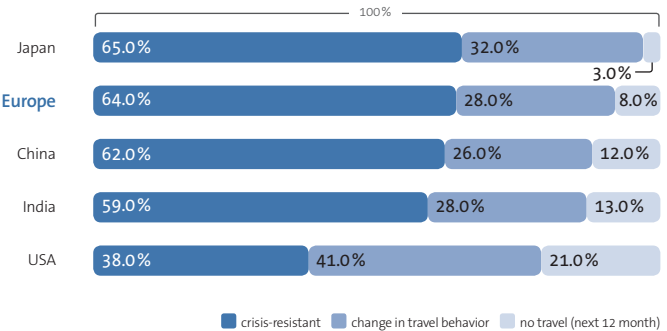
↗ 2011: **+4.4%** worldwide **+5.8%** Europe

Economic crisis and tourism

Source: GNTB/WTM 2012 (5), outbound travellers only

## European and major asian outbound markets mostly crisis-resistant for traveling in 2012

Impact of financial and economic crisis on the travel behavior

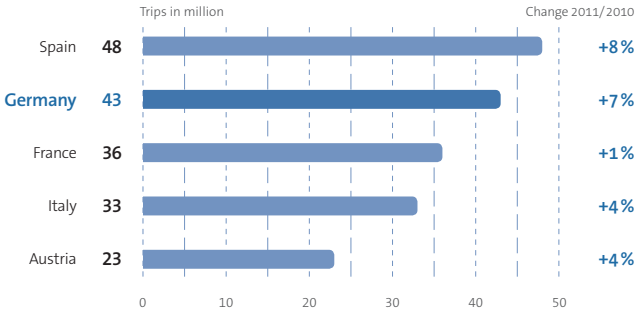


International travel destination Germany

Source: GNTB/WTM 2012 (5)

Germany the second most popular travel destination for Europeans in 2010 and 2011, behind Spain

Germany with a high growth rate among the top five destinations worldwide for European travellers

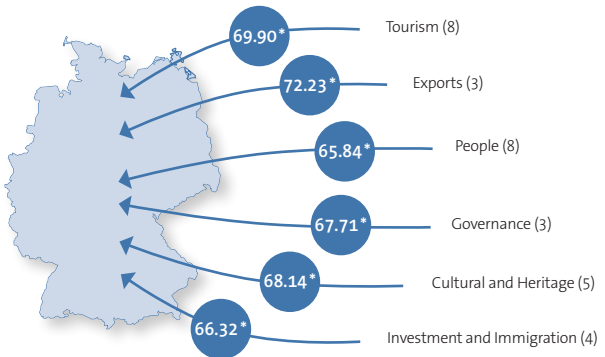


Germany in the World

Source: Anholt-GfK Roper Nation-Brands-Index 2011 (7)

Germany worldwide in second place

Image 2011: on the demand side, Germany is in second place of 50 countries worldwide. Tourism is one of the six key locational factors for a country's Image



\* from a max. 100 of points; in brackets: worldwide ranking

## Germany in the World

Source: Anholt-GfK Roper Nation-Brands-Index 2011 (7)

## Germany among the top 10 worldwide destinations in tourism and culture

Major events (FIFA World Cup 2006™) have lasting positive effects on image

\*out of 50 countries worldwide

Period	Ranking* for Germany overall	Ranking* for tourism image	Ranking* for cultural image
2006 1st quarter (before FIFA World Cup)	5	19	5
2006 4th quarter (after FIFA World Cup)	1	13	4
2008	1	10	4
2009	3	9	5
2010	2	9	4
<b>2011</b>	<b>2</b>	<b>8</b>	<b>5</b>

## Germany in the World

Source: Anholt-GfK Roper Nation-Brands-Index 2011 (7)

Lasting impact of the World Cup, plus sporting success, define Germany's international image, just as much as museums, design and music

Tourism-related and cultural word associations: Germany continues to be linked with a broad range of cultural activities

Strenuous **Film** Relaxing **Fascinating**  
**Informative** Risqué **Modern design**  
 Boring **Museums** **Music** Circus  
**Opera** Romantic **Sculpture** Spiritual  
**Exciting** **Sport** Pop videos  
 Depressing **Street parades**

T&T Competitiveness Index

Source: World Economic Forum 2011 (3)

## Germany leading in health standards, infrastructure, culture, security, education and environment

Germany's strength as international travel destination compared with 139 nations worldwide (Rank 1: Switzerland, rank 3: France)

Scale: 1 = low, 7 = high

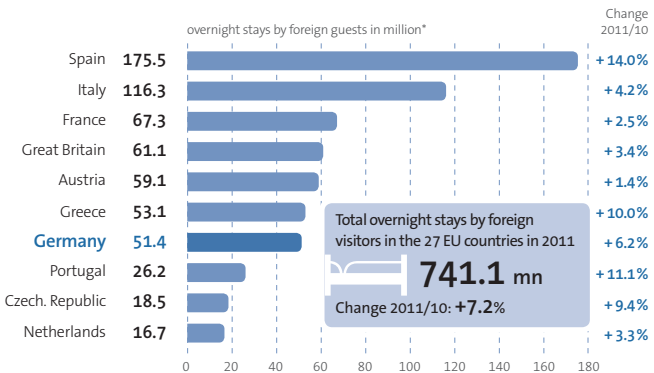
Indicator	Score 2011
Health and hygiene	6.8
Ground transport infrastructure	6.5
Tourism infrastructure	6.3
Cultural resources	6.3
Safety and security	6.2
Education and training	6.0
Environmental sustainability	5.8
ICT infrastructure	5.7
Air transport infrastructure	5.5
<b>2011 Index for GERMANY</b>	<b>5.5</b>

## Germany inside Europe

Source: Eurostat 2012 (2), as of April 2012

## Germany has a market share of 7% in total overnight stays by foreign visitors in the European Union

Germany is in the seventh place with a high growth rate



## Incoming Tourism in Germany

Source: Federal Statistical Office 2012 (4), GNTB 2012 (6)

## Germany

Capital		Berlin
Federal states		16
Non-city states		13
City states		3
Member of UNWTO		since 1976
Surface (1,000 sq. km)		357
Population (million)		82,2
Gross domestic product (2011 in Euro bn)		2,570,0
GDP per capita 2011 (in Euro)		31,265
Real GDP growth (in %)	2010/2011	+ 3.7/+ 3.0

Economic importance of travel and tourism<sup>1</sup>

<b>Total expenditure by tourists</b>		€ 278,3 bn
by domestic tourists		€ 241.7 bn (87%)
by international tourists		€ 36.6 bn (13%)
<b>Total national gross value added</b> (direct, indirect, and induced effect)		€ 214.1 bn.
Proportion of total national gross value added		9.7%
of which: <b>total national gross value added</b> (direct effect)		€ 97.0 bn
Proportion of total national gross value added		4.4%
<b>Overall impact on employment</b> (direct, indirect, and included)		4.9 million workers
Proportion of total number of workers in Germany		12.0%
of which: <b>impact on employment</b> (direct)		2.9 million workers
Proportion of total number of workers in Germany		7.0%

## International arrivals 2011

International arrivals in million (incoming)	28.4
Arrivals per 100 of the population	35

## Travel and tourism in Germany 2011

Overnight stays by domestic travellers (thousands)	320,290
Domestic growth	+ 3.2%
Overnight stays by international travellers (thousands)	63,746
International growth	+ 5.7%
Total overnight stays (thousands)	394,036
Total growth	+ 3.6%
Sales turnover of overnight stays by domestic travellers <sup>1</sup>	€ 115,4 bn

## of which hotel / guesthouse

Overnight stays by domestic travellers (thousands)	189,392
Overnight stays by international travellers (thousands)	51,390
Total overnight stays (thousands)	240,782
Number of hotel beds <sup>2</sup> (as of July 2011)	1,750,003
Hotel room occupancy <sup>5</sup>	(2010: 63.4%) 65.1%

Outgoing travel 2011<sup>3</sup>

Trips taken by Germans (in thousands)	320,900
Of which trips abroad (in thousands)	72,900
No. of foreign holiday trips per 100 of the population	63

Inbound travel from Europe 2011<sup>3</sup>

Trips to Germany by Europeans (in thousands)	42,700
Expenditure for travel to Germany	per trip/person: € 511    per night/person: € 84
Length of stay in Germany (average)	6.4 nights

Travel and tourism balance of payments 2011<sup>4</sup>

Expenditure on travel and tourism	(11/10: + 2.8%)	€ 60.6 bn
Income from travel and tourism	(11/10: + 6.7%)	€ 27.9 bn
International balance of payments for travel and tourism	(11/10: - 0.3%)	€ - 32.7 bn

<sup>1</sup> DIW econ 2012, TSA-Base year 2010 <sup>2</sup> In hotels / b & b-hotels / inns / guesthouses (according to Federal Statistical Office)<sup>3</sup> GNTB/WTM 2012 (5) <sup>4</sup> Deutsche Bundesbank, April 2012 <sup>5</sup> IHA/STR Global 2012

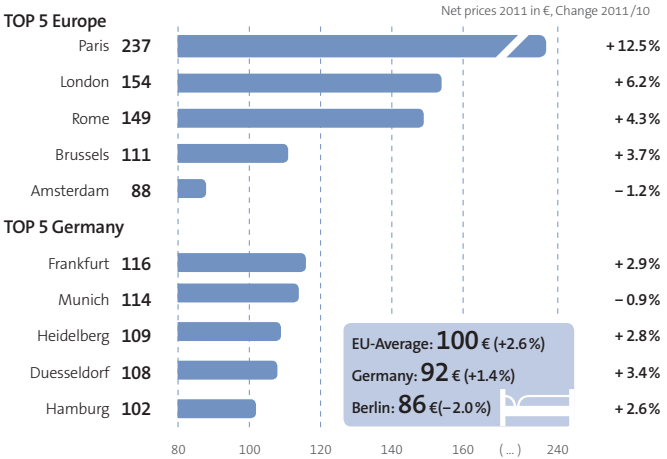


## Hotel prices in Europe and Germany

Source: IHA/STR Global 2012 (10)

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

Germany has an excellent price / performance ratio in hotel accommodation

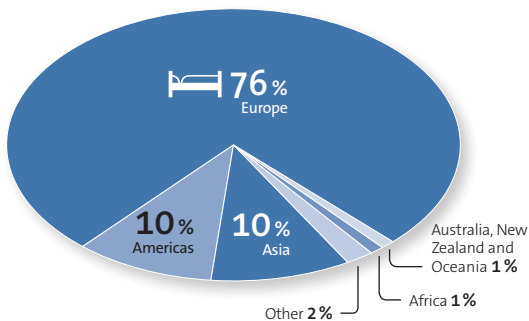


## Source markets for Incoming Tourism

Source: Federal Statistical Office 2012 (4)

### Breakdown of overnight stays in Germany by continent

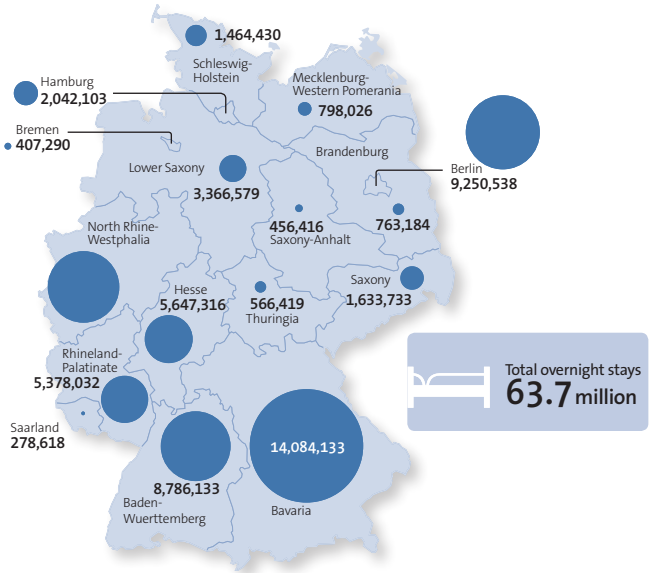
Europe with a growth rate of +6.0 % in 2011 still the most important source market. Asia extends its market share



Incoming Tourism – importance and breakdown

Source: Federal Statistical Office 2012 (4)

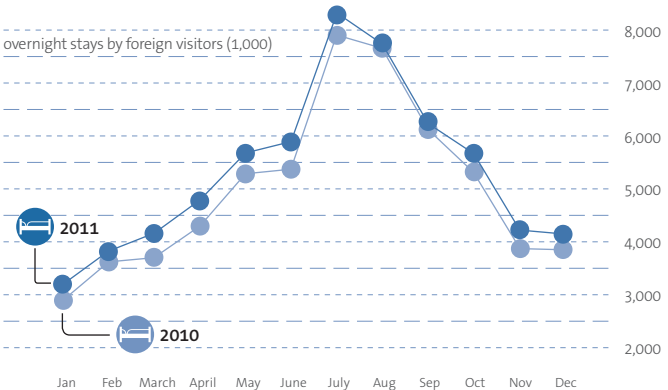
Overnight stays in Germany by foreign visitors in 2011 by federal state



Seasonal breakdown

Source: Federal Statistical Office 2012 (4)

Seasonal breakdown of overnight stays by foreign visitors travelling to Germany



## Accommodation capacities

Source: Federal Statistical Office 2011 (4) <sup>1</sup> as of July 2011

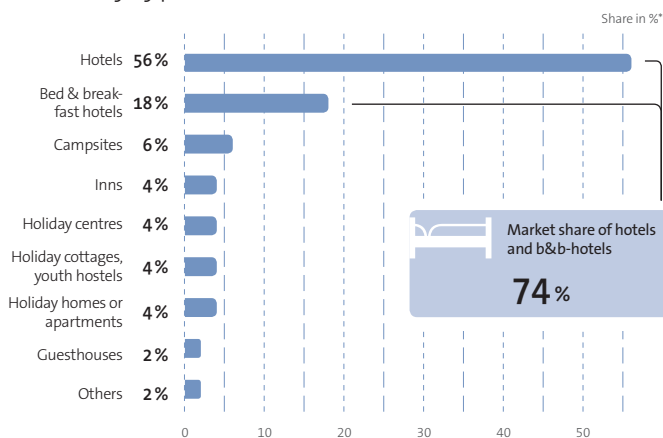
### Capacities in Germany by type of accommodation 2011

Type of accommodation	Establishments in operation <sup>1</sup>	Accommodation capacity Share in %*
Hotels	13,495	24.6
Bed & breakfast hotels	7,948	14.5
Inns	8,654	15.7
Guesthouses	5,550	10.1
<b>Traditional accommodation providers</b>	<b>35,647</b>	<b>64.9</b>
Leisure, recreational and training centres	2,626	4.8
Holiday centres	119	0.2
Holiday homes or apartments	10,719	19.5
Holiday cottages, youth hostels	1,908	3.5
Campsites	3,028	5.5
Preventative medical clinics and rehabilitation clinics	902	1.6
<b>All types of accommodation</b>	<b>54,949</b>	<b>100.0</b>

## Types of accommodation

Source: Federal Statistical Office 2012 (4)

### Overnight stays in Germany by foreign visitors in 2011 by type of accommodation

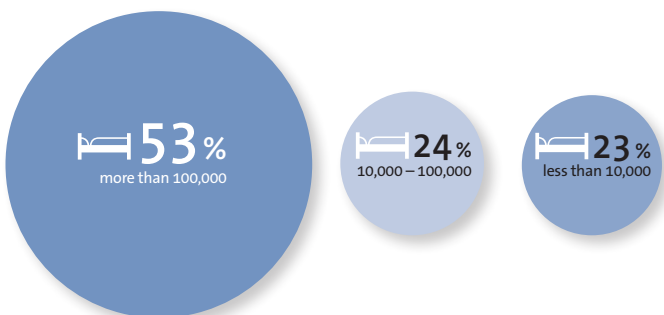


## City breaks

Source: Federal Statistical Office 2012 (4)

## Breakdown of overnight stays in 2011 by foreign visitors in German towns and cities according to size

53% of overnight stays by foreign visitors are in towns and cities with a population of more than 100,000

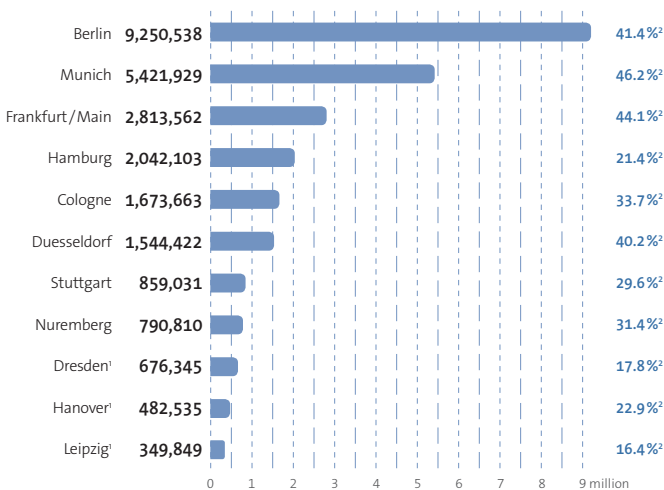


## City breaks

Source: Regional Statistical Offices 2012 (11), GNTB 2012 (6)

## Top towns and cities in Germany in 2011 (overnights stays)

The 11 largest cities have about 41% market share of all overnight stays by foreign visitors in Germany



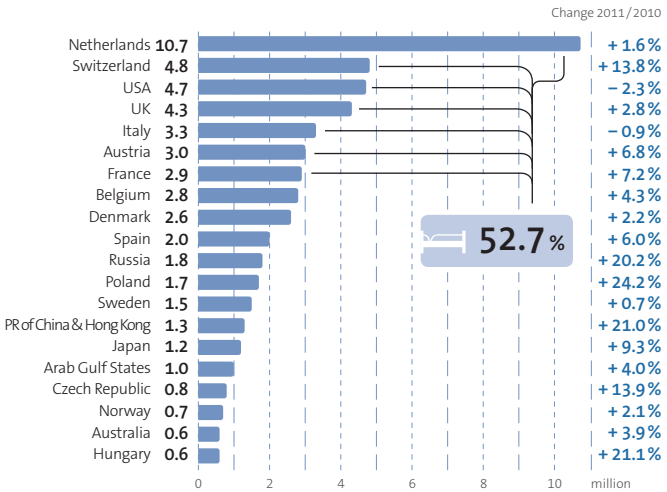
<sup>1</sup> excluding campsites <sup>2</sup> The percentage figures refer to the number of overnight stays by foreign visitors as a percentage of the total number of overnight stays (in each respective city)

## Source markets for Incoming Tourism

Source: Federal Statistical Office 2012 (4)

### Top 20 source markets for Germany by number of overnight stays in 2011

Netherlands Germany's number 1 source market, Switzerland first time at second place

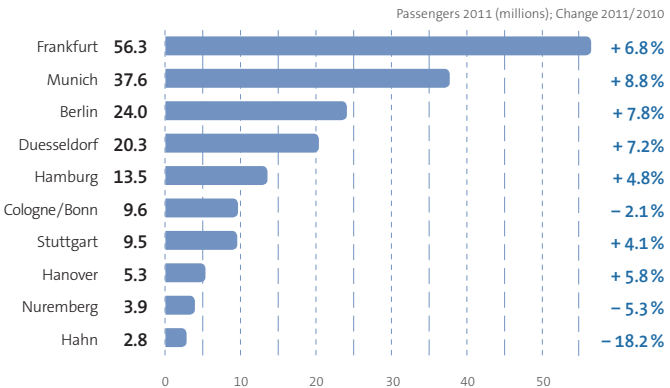


## Airports

Source: ADV 2012 (13)

### Traffic revenue at Germany's international airports increased by +5.0% in 2011

92% of the passenger volume of 198.2 million is allotted to the TOP 10 airports\*



\*excl. transit flights

## Business travel / Trade fairs / Conventions

Source: DIW econ 2012 (15)

International visitors spend around €37 billion in total during their trips to Germany

	Private travellers	Business travellers
With accommodation	€20.6 billion	€13.5 billion
Day visits	€1.3 billion	€1.2 billion
<b>Total</b>	<b>€21.9 billion</b>	<b>€14.7 billion</b>

Total expenditure € **36.6 billion**  
= 13% of the total expenditure by tourists in Germany of €278.3 billion

Germany as a conference location:  
No. 1 in Europe – no. 2 worldwide

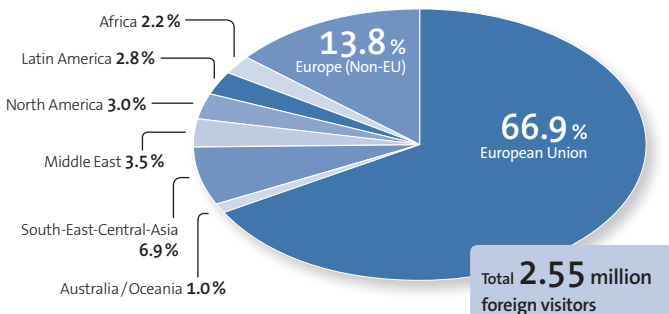
ICCA - Ranking: International Meetings 2010

Rank	TOP 10 in Europe	Number of meetings	TOP 10 worldwide	Number of meetings
1.	<b>Germany</b>	<b>542</b>	USA	623
2.	Spain	451	<b>Germany</b>	<b>542</b>
3.	UK	399	Spain	451
4.	France	371	UK	399
5.	Italy	341	France	371

Source: ICCA 2011 (16)

## Trade Fairs in Germany

Foreign visitors 2010/ AUMA category international and national events

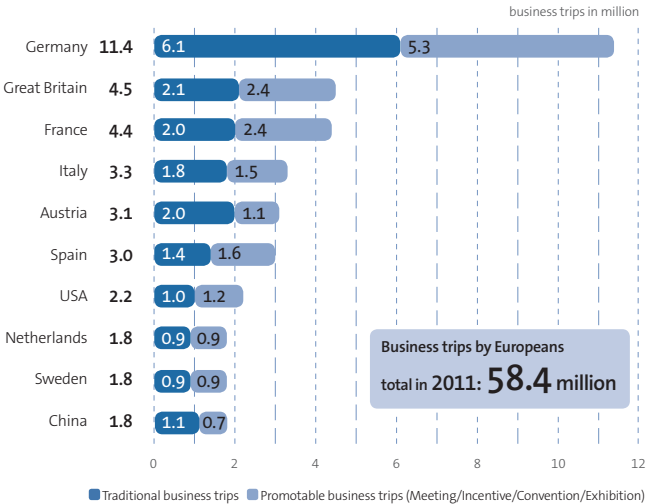


Source: AUMA 2011 (8)

Business travel destinations for Europeans

Source: GNTB/WTM 2012 (5)

Germany leads the way among the top ten business travel destinations for Europeans



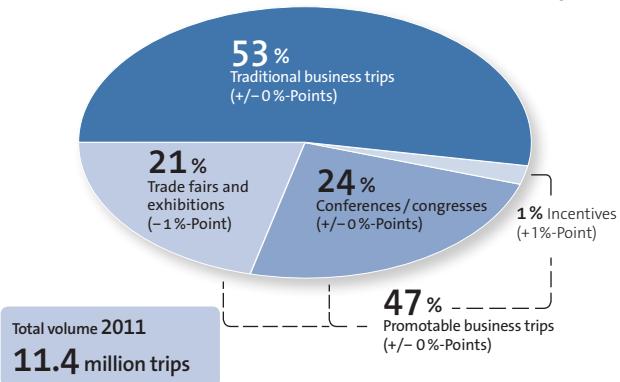
Types of business trips

Source: GNTB/WTM 2012 (5)

Breakdown of European business travel volume into different types of business trips to Germany 2011

5.3 million promotable business trips

Share (change to 2010)



Reasons for travel among Europeans

Source: GNTB/WTM 2012 (5)

## Reasons for travel among Europeans travelling abroad and to Germany in 2011

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

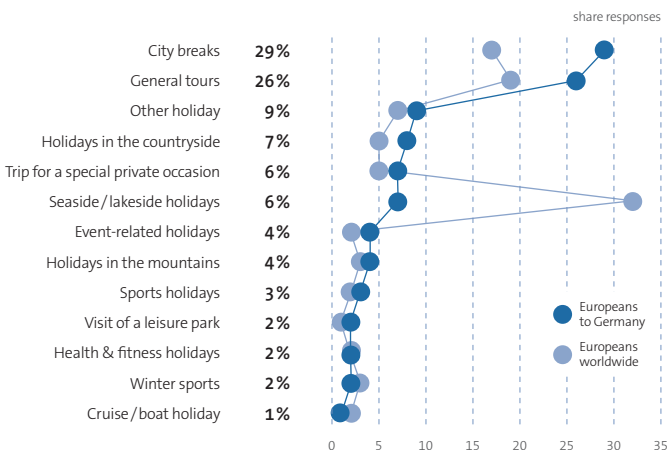
Reason for travel	Europe 2011 in million *	Germany 2011 in million *	Europe 2011 Percentage *	Germany 2011 Percentage *
Holidays	300.5	23.2	72.8%	54.9%
Short breaks of 1–3 nights	67.1	10.7	16.3%	25.0%
Longer holidays of 4+ nights	233.4	12.5	56.6%	29.4%
Visits to friends or relatives	24.8	3.7	6.0%	8.7%
Other travel	29.0	4.3	7.2%	10.1%
Business trips	58.4	11.4	14.1%	26.8%
<b>Total travel</b>	<b>412.8</b>	<b>42.7</b>	<b>100%</b>	<b>100%</b>

Holiday preferences

Source: GNTB/WTM 2012 (5)

## Ranking of holiday contents of Europeans in Germany 2011 as a percentage

In 2011 Germany's strengths lay in city/event breaks and general tours





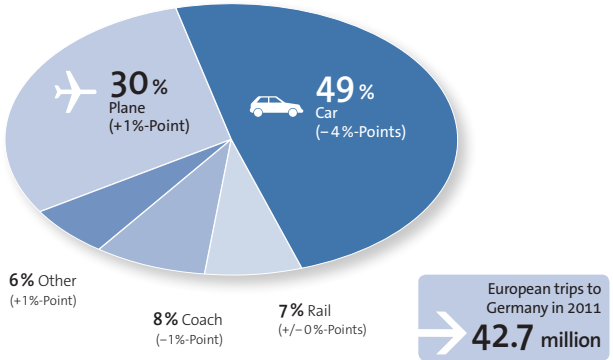
Transport/Modal split

Source: GNTB/WTM 2012 (5)

## Car and plane travel more popular again in 2011

All trips from Europe to Germany in 2011: 42.7 million

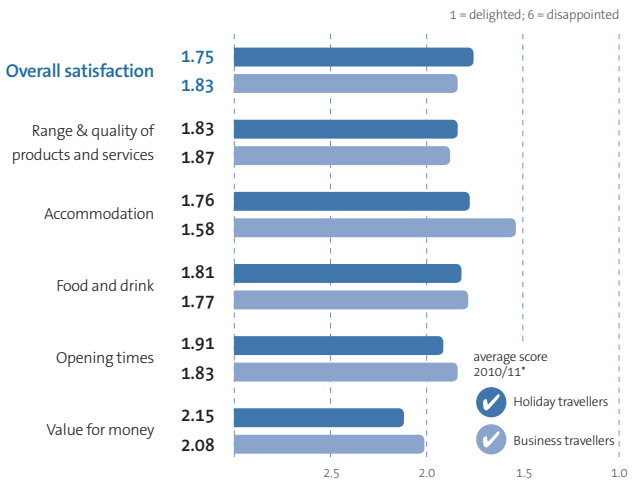
Share (change to 2010)



Satisfaction of holidaymakers

Source: GNTB/ERV 2012 (12), rounded values

## Excellent scores from abroad for destination Germany



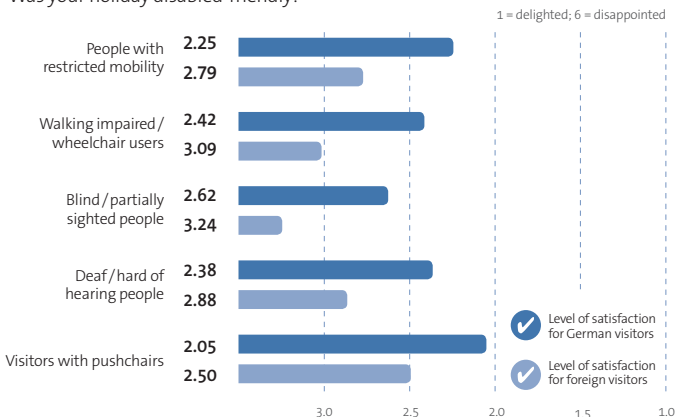
\*May 2010 – April 2011, total travel from abroad, as of February 2012

Disabled-Friendliness

Source: GNTB/ERV 2009 (14), rounded values

## Good to satisfactory rating for accessibility by German and international visitors

Was your holiday disabled-friendly?



Source markets in Northwest/Southwest Europe

Source: Federal Statistical Office 2012 (4), GNTB 2012 (6)

## Source markets in Northwest and Southwest Europe

With a total of 31.5 million overnight stays in 2011, the source markets of Northwest and Southwest Europe have a 50% share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2011	Forecast OS 2020 *	Population in millions <sup>1</sup>
<b>Northwest Europe</b>	<b>18,535,198</b>	<b>21,200,000</b>	<b>94.9</b>
Netherlands	10,653,148	11,000,000 to 13,300,000	16.7
UK and Rep. of Ireland	4,608,666	4,300,000 to 5,400,000	66.9
Belgium	2,755,820	2,700,000 to 4,000,000	10.8
Luxembourg	517,564	800,000	0.5
<b>Southwest Europe</b>	<b>13,005,659</b>	<b>18,200,000</b>	<b>178.1</b>
Switzerland	4,764,553	5,000,000 to 7,100,000	7.7
Italy	3,262,617	5,100,000	60.8
France	2,933,315	3,600,000	63.1
Spain	2,045,174	3,800,000	46.5
<b>Total</b>	<b>31,540,857</b>	<b>39,400,000</b>	<b>273.0</b>


**Overnight stays by foreign visitors**  
 2011: **31.5 mn**    2020: **39.4 mn**

## Source markets in Northeast Europe

Source: Federal Statistical Office 2012 (4), GNTB 2012 (6)

### Source markets in Northeast Europe / Russia

With 9.3 million overnight stays in 2011, the source markets of Northern and Eastern Europe / Russia have a 15 % share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2011	Forecast OS 2020*	Population in millions <sup>1</sup>
<b>Northeast Europe / Russia</b>	<b>9,281,364</b>	<b>10,800,000</b>	<b>210.2</b>
Denmark	2,583,749	3,000,000 to 3,800,000	5.5
Russia	1,786,603	2,000,000	140.4
Poland	1,716,479	2,000,000	38.0
Sweden	1,525,431	1,600,000 to 1,800,000	9.3
Norway	749,284	900,000	4.9
Finland	600,392	900,000	5.3
Baltic States	319,426	500,000	6.8



Overnight stays by foreign visitors

2011: **9.3 mn**

2020: **10.8 mn**

## Source markets in Southeast Europe

Source: Federal Statistical Office 2012 (4), GNTB 2012 (6)

### Source markets in Southeast Europe

With a total of about 6.3 million overnight stays in 2011, the source markets of Southeast Europe have about a 10 % share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2011	Forecast OS 2020*	Population in millions <sup>1</sup>
<b>Southeast Europe</b>	<b>6,266,506</b>	<b>7,400,000</b>	<b>36.3</b>
Austria	3,030,904	3,200,000 to 4,470,000	8.4
Czech Republic	765,879	780,000	10.5
Hungary	618,408	650,000	10.0
Slovakia	267,996	720,000	5.4
Slovenia	183,319	580,000	2.0
Balkans <sup>2</sup>	1,400,000**	1,500,000	47.5



Overnight stays by foreign visitors

2011: **6.3 mn**

2020: **7.4 mn**

\* deviations due to rounding \*\*GNTB calculation; <sup>1</sup> data 2011

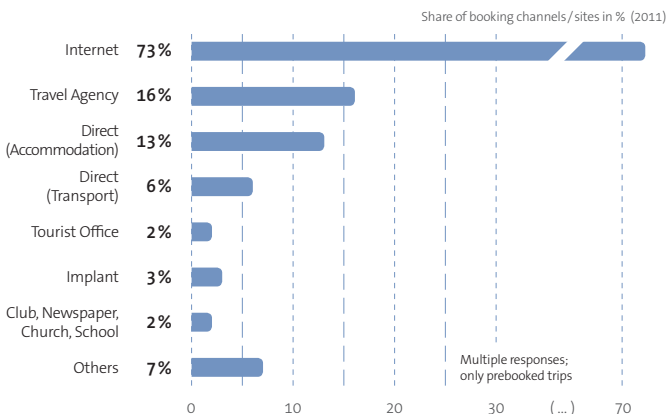
<sup>2</sup> Bosnia and Herzegovina, Bulgaria, Croatia, Montenegro, Romania, Serbia

Travel arrangements

Source: GNTB/WTM 2012 (5)

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

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



Source markets in America / Israel

Source: Federal Statistical Office 2012 (4), GNTB 2012 (6)

## Source markets in America / Israel

With about 7.0 million overnight stays in 2011 the source markets in America and Israel have a 11 % share of all overnight stays in Germany by foreign visitors. USA with a total of 4.7 million overnight stays in 2011 is the main overseas source market

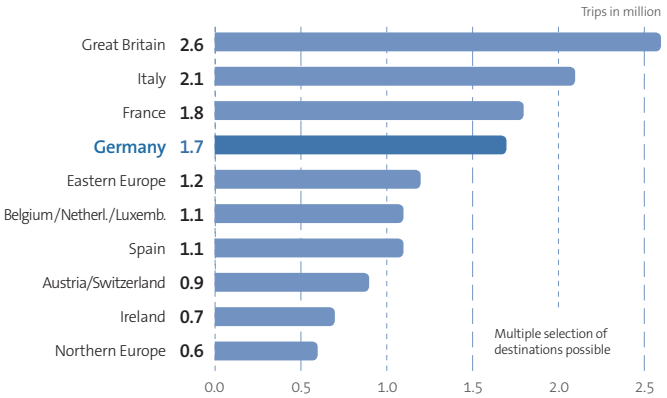
Markets	Overnight stays 2011	Forecast OS 2020*	Population in millions <sup>1</sup>
<b>America / Israel</b>	<b>6,983,909</b>	<b>8,300,000</b>	<b>946.4</b>
USA	4,661,597	5,900,000	313.1
Canada	597,579	850,000	34.4
Brazil	586,590	830,000	196.7
<b>Central-/South America</b>	<b>583,348</b>	<b>n.n.</b>	<b>394.6</b>
<b>America total</b>	<b>6,429,114</b>	<b>7,600,000</b>	<b>938.8</b>
<b>Israel</b>	<b>554,795</b>	<b>700,000</b>	<b>7.6</b>

Overnight stays by foreign visitors  
 2011: **7.0 mn**      2020: **8.3 mn**

\* deviations due to rounding <sup>1</sup> 2011 data

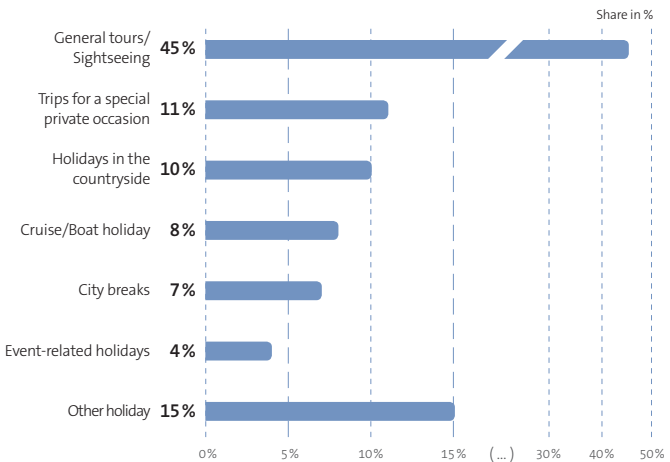
## Main travel destinations for US Americans in Europe

Total travel from the USA to Europe 2011: 12.8 million trips



## General tours/sightseeing are the dominant holiday activities of US travellers in Germany 2011

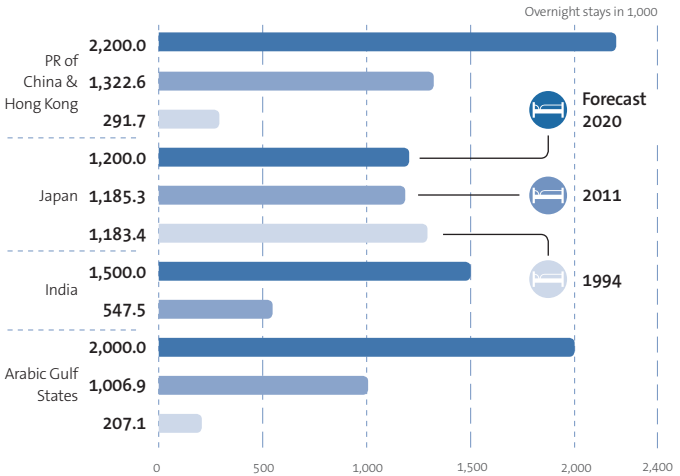
Type of holiday in Germany by visitors from USA



Asian source markets

Source: Federal Statistical Office 2012 (4), GNTB 2012 (6)

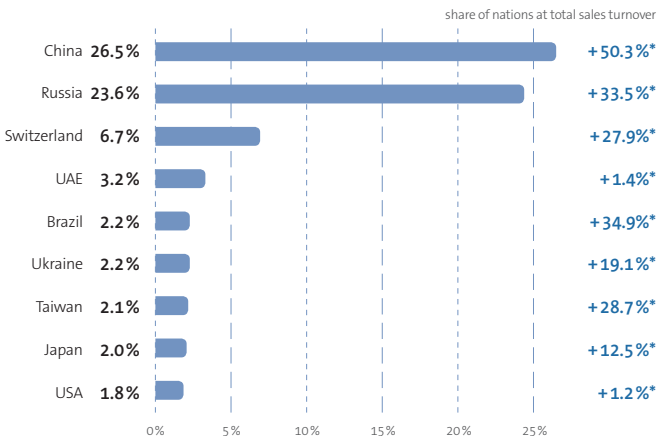
## China is most important Asian source market for Germany



Tax-Free Shopping

Source: Global Blue 2012 (12)

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



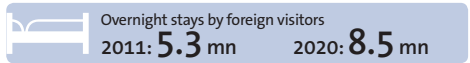
Other source markets

Source: Federal Statistical Office 2012 (4), GNTB 2012 (6)

## Source markets Asia, Australia and Africa

With about 5.3 million overnight stays in 2011, the source markets Asia, Australia and Africa have a share of about 8% of all overnight stays in Germany by foreign visitors

	Overnight stays 2011	Forecast OS 2020 *	Population in million <sup>1</sup>
<b>Asia/Australia/Africa</b>	<b>5,297,623</b>	<b>8,500,000</b>	<b>2,886.6</b>
PR of China / Hong Kong	1,322,564	2,200,000	1,347.6
Japan	1,185,279	1,200,000	126.5
Arabic Gulf States	1,006,856	2,000,000	36.0
Australia, New Zealand and Oceania	731,836	900,000 <sup>2</sup>	36.3
India	547,480	1,500,000	1,241.5
South Korea	346,856	600,000	48.4
South Africa	156,752	n.n.	50.5



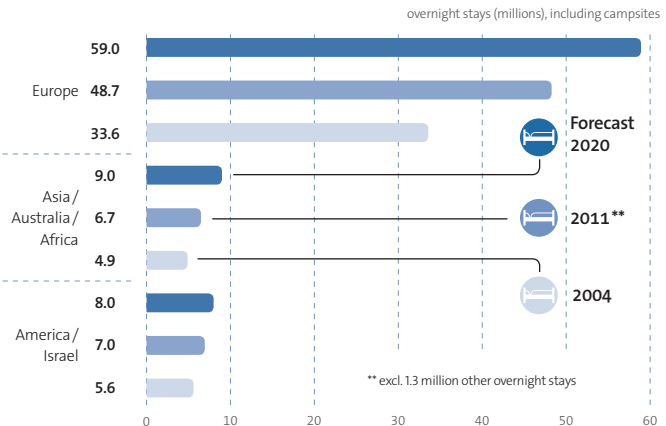
<sup>1</sup> data 2011 <sup>2</sup> Australia only

## GNTB growth outlook

Source: Federal Statistical Office 2012 (4), GNTB 2012 (6)

## GNTB growth forecasts for 2020

Through successful marketing Germany can net about 70 to 80 million overnight stays from abroad by 2020



\* deviations due to rounding

## 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 30 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

- |  |  |
|--|--|
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