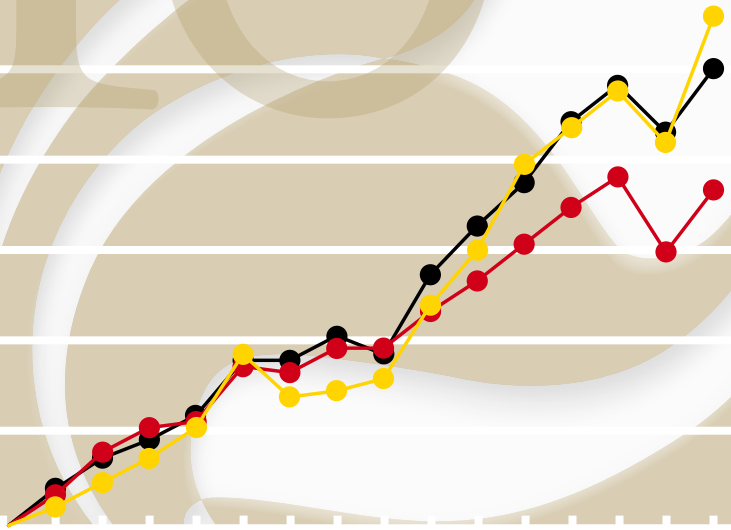




German National Tourist Board

Incoming-Tourism Germany

Edition 2011



Facts and Figures 2010

Supported by:





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Introduction

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

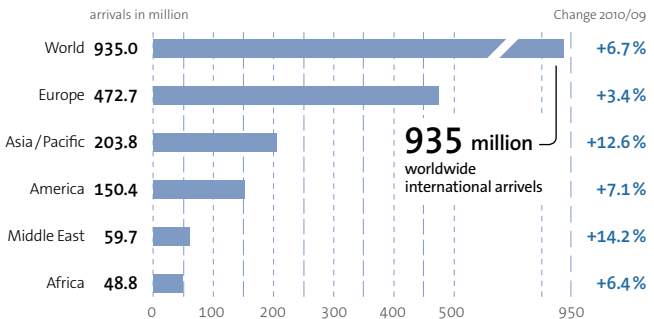
This publication is aimed at providing the GNTB's partners with a regular and up-to-date annual overview of the most important market research results for the previous travel year. This edition is based on studies by the UNWTO, EUROSTAT, the WEF and studies carried out by the GNTB's own business planning 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 2010

Source: UNWTO 2011 (1)

Arrivals picked up in 2010 following the crisis and grew by 7% worldwide

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



worldwide growth forecast 2011:

+4% to +5%

Growth Outlook world tourism

Source: UNWTO 2011 (1)

Growth Outlook for world tourism 2020

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	472.7	717.0	3.1	59.8	45.9
America	110.0	150.4	282.0	3.8	19.3	18.1
East Asia/Pacific	81.0	192.8	397.0	6.5	14.4	25.4
Africa	20.0	48.8	77.0	5.5	3.6	5.0
Middle East	14.0	59.7	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	935.0	1,561.0	4.1	100.0	100.0



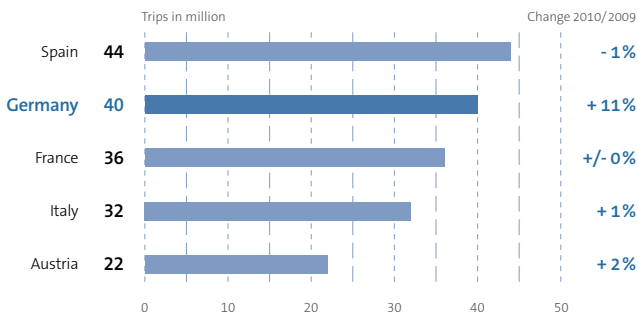
2010: **+6.7%** worldwide **+3.4%** Europe

International travel destination Germany

Source: GNTB/WTM 2011 (5)

Germany the second most popular travel destination for Europeans for the first time in 2010, behind Spain

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

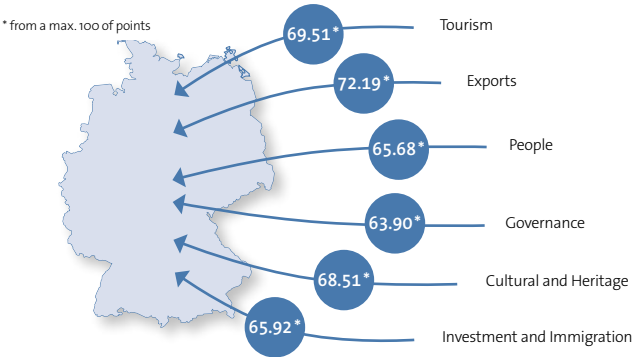


Germany in the World

Source: Anholt-GfK Roper Nation-Brands-Index 2010 (7)

Germany worldwide in second place

On the demand side, Germany is in second place of 50 countries worldwide – enduring success since the 2006 World Cup. Tourism is one of the six key locational factors for a country's Image



Germany in the World

Source: Anholt-GfK Roper Nation-Brands-Index 2010 (7)

Germany among the top 10 of 50 worldwide destinations

Germany receives excellent ratings from its major source and growth markets

Cultural image	Germany's ranking	Tourism image	Germany's ranking
Total Germany	4	Total Germany	9
USA	3	Russia	5
Russia	3	China	6
China	3	India	6
France	5	Japan	7
India	6	Brazil	8

Germany in the World

Source: Anholt-GfK Roper Nation-Brands-Index 2010 (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)

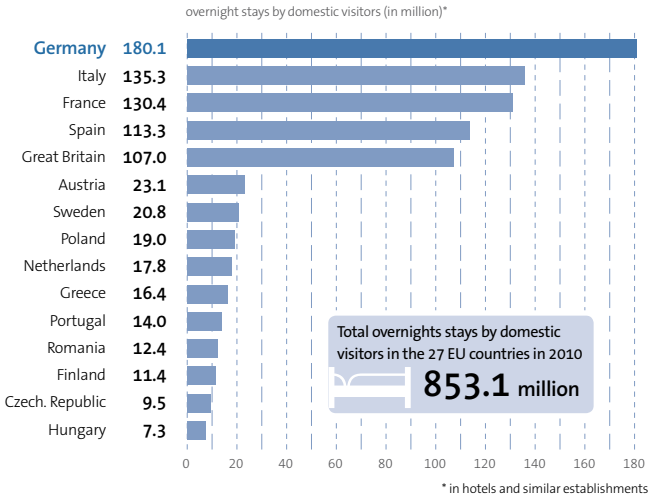
Travel & Tourism Competitiveness Index 2011

From a supply perspective, Germany is in second place compared to 139 countries worldwide

Country	2011	Index-Wert	2009
	Ranking of 139		Ranking of 133
Switzerland	1	5.68	1
Germany	2	5.50	3
France	3	5.41	4
Austria	4	5.41	2
Sweden	5	5.34	7
USA	6	5.30	8
UK	7	5.30	11
Spain	8	5.29	6
Canada	9	5.29	5
Singapore	10	5.23	10

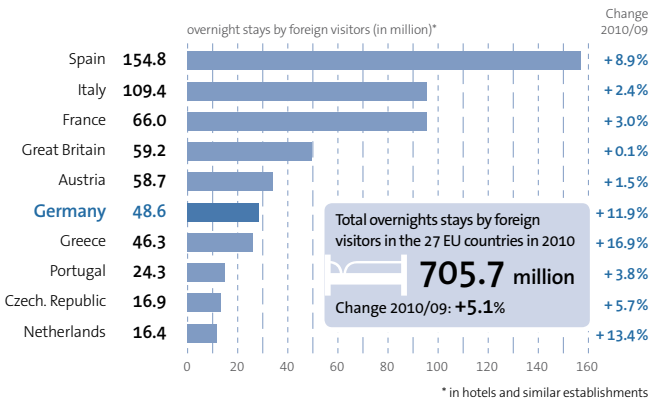
Germany is the largest domestic tourism market in the European Union

Germany is ranked first with a market share of 21%



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

Germany is in the sixth place with an above average growth rate



Incoming Tourism in Germany

Source: Federal Statistical Office 2011 (4), GNTB 2011 (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)		82.1
Gross domestic product (2010 in Euro bn)		2,497.6
GDP per capita 2010 (in Euro)		30,421
Real GDP growth (in %)	2008	+ 1.3
	2009	- 4.7
	2010	+ 3.6

Economic importance of travel and tourism ¹

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 (as of 2004)		3.2%

International arrivals 2010

International arrivals in million (incoming)		26.9
Arrivals per 100 of the population		33

Travel and tourism in Germany 2010

Overnight stays by domestic travellers (thousands)		320,024
Domestic growth		+ 2.0%
Overnight stays by international travellers (thousands)		60,310
International growth		+ 10.0%
Total overnight stays (thousands)		380,334
Total growth		+ 3.2%
Sales turnover of overnight stays by domestic travellers ⁵		€ 53.0 bn

of which hotel / guesthouse

Overnight stays by domestic travellers (thousands)		179,956
Overnight stays by international travellers (thousands)		48,386
Total overnight stays (thousands)		228,342
Number of hotel beds ² (as of July 2010)		1,721,729
Hotel room occupancy ⁶	(2009: 59.9%)	63.4%

Outgoing travel 2010 ³

Trips taken by Germans (in thousands)		308,300
Of which trips abroad (in thousands)		72,000
No. of foreign holiday trips per 100 of the population		62

Inbound travel from Europe 2010 ³

Trips to Germany by Europeans (in thousands)		40,000
Expenditure for travel to Germany	per trip/person: € 497	per night/person: € 84
Length of stay in Germany (average)		6.3 nights

Travel and tourism balance of payments 2010 ⁴

Expenditure on travel and tourism	(10/09: + 0.7%)	€ 58.6 bn
Income from travel and tourism	(10/09: + 5.3%)	€ 26.2 bn
International balance of payments for travel and tourism	(10/09: - 2.7%)	€- 32.4 bn

Expenditure for domestic travel 2010 ³

€ 66.7 bn

¹ GWS on behalf of the Federal Ministry of Economics and Labour 2003, TSA-Base year 2000 ² In hotels / b & b-hotels / inns / guesthouses (according to Federal Statistical Office) ³ GNTB/WTM 2011 (5), ⁴ Deutsche Bundesbank, April 2011

⁵ DWIF, Munich 2010 ⁶ IHA/STR Global 2011

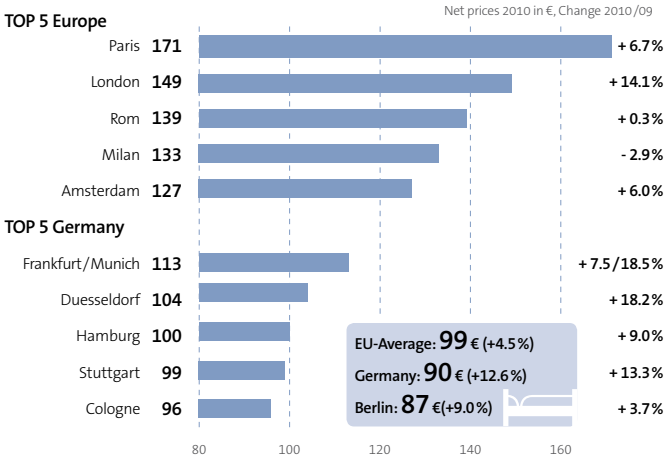
* excl. business travel, travel to visit friends and family, public investment

Hotel prices in Europe and Germany

Source: IHA/STR Global 2011 (10)

Comparison of hotel prices in European and German cities

Germany has an excellent price/performance ratio in hotel accommodation

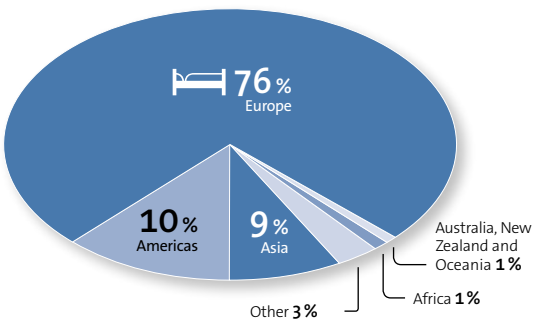


Source markets for Incoming Tourism

Source: Federal Statistical Office 2011(4)

Breakdown of overnight stays in Germany by continent

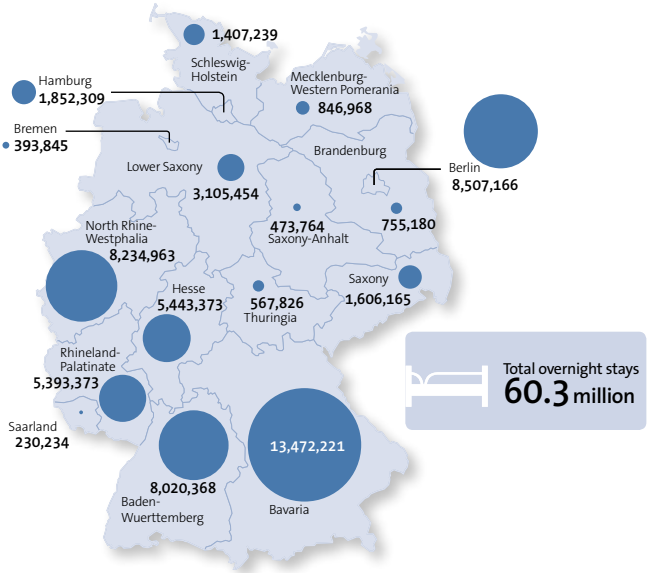
Europe with a growth rate of +8.9 % in 2010 still the most important source market. Asia extend its market share



Incoming Tourism – importance and breakdown

Source: Federal Statistical Office 2011 (4)

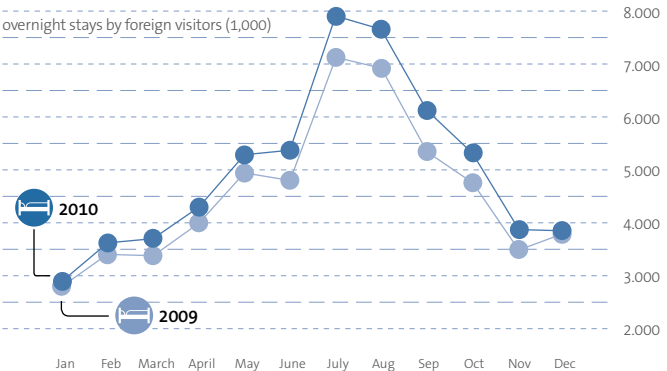
Overnight stays in Germany by foreign visitors in 2010 by federal state



Seasonal breakdown

Source: Federal Statistical Office 2011 (4)

Seasonal breakdown of overnight stays by foreign visitors travelling to Germany



Accommodation capacities

Source: Federal Statistical Office 2010 (4) ¹ as of July 2010

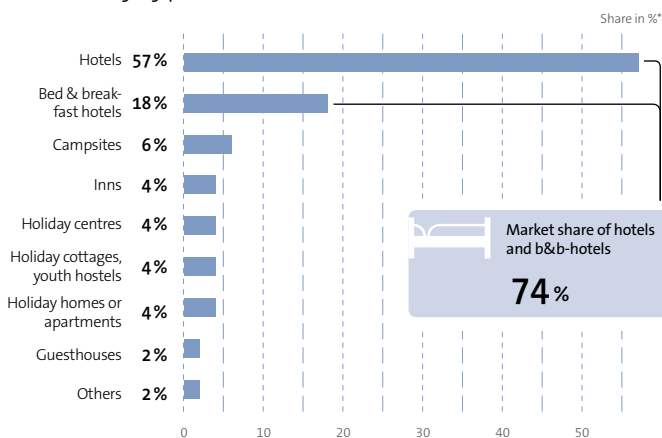
Capacities in Germany by type of accommodation 2010

Type of accommodation	Establishments in operation ¹	Accommodation capacity Share in %*
Hotels	13,487	24.4
Bed & breakfast hotels	8,033	14.5
Inns	8,893	16.1
Guesthouses	5,530	10.0
Traditional accommodation providers	35,943	65.0
Leisure, recreational and training centres	2,651	4.8
Holiday centres	113	0.2
Holiday homes or apartments	10,852	19.6
Holiday cottages, youth hostels	1,897	3.4
Campsites	2,952	5.3
Preventative medical clinics and rehabilitation clinics	907	1.6
All types of accommodation	55,315	100.0

Types of accommodation

Source: Federal Statistical Office 2011 (4)

Overnight stays in Germany by foreign visitors in 2010 by type of accommodation



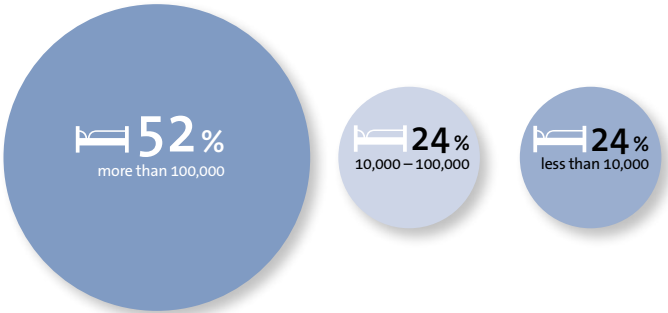
*deviations due to rounding

City breaks

Source: Federal Statistical Office 2011 (4)

Breakdown of overnight stays in 2010 by foreign visitors in German towns and cities according to size

52% of overnight stays by foreign visitors are in towns and cities with a population of more than 100,000

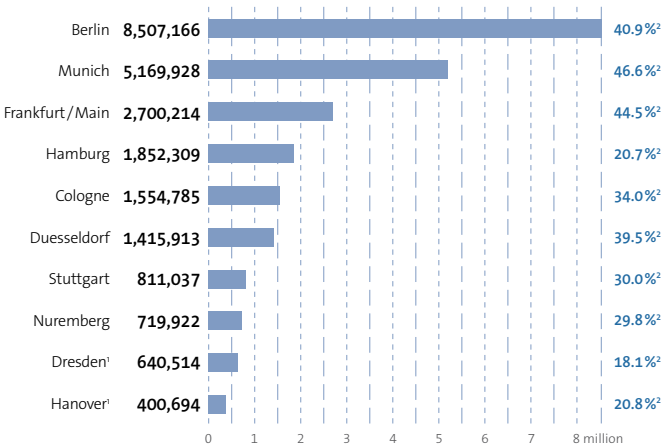


City breaks

Source: Regional Statistical Offices 2011 (11), GNTB 2011 (6)

Top towns and cities in Germany in 2010 (overnights stays)

The 10 largest cities have a 40% market share of all overnight stays by foreign visitors in Germany



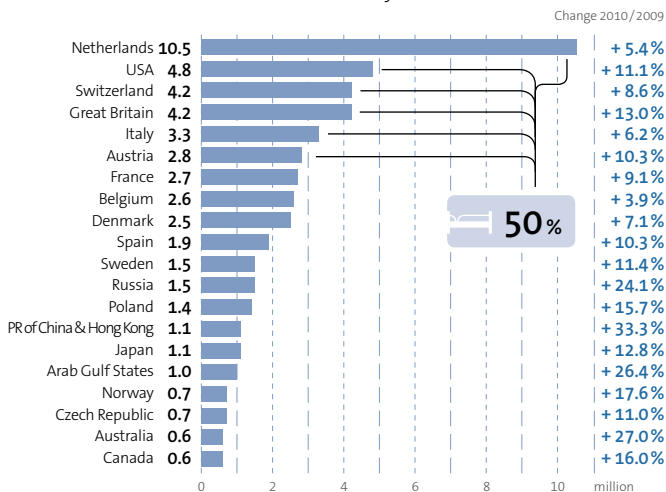
¹ excluding campgrounds ² The percentage figures refer to the number of overnight stays by foreign visitors as a percentage of the total number of overnight stays (in each respective city)

Source markets for Incoming Tourism

Source: Federal Statistical Office 2011 (4)

Top 20 source markets for Germany by number of overnight stays in 2010

Netherlands well ahead of the rest as Germany's number 1 source market

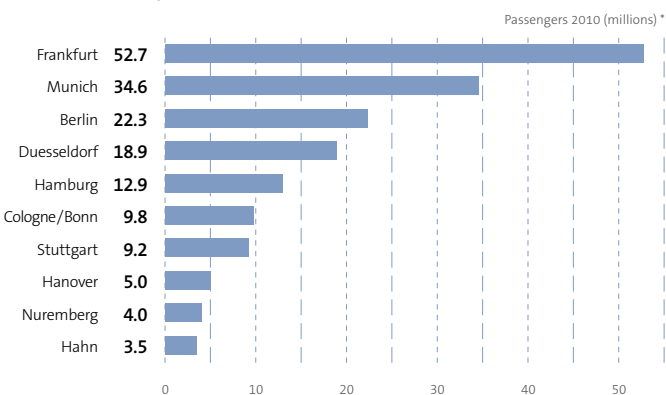


Airports

Source: ADV 2011 (13)

Traffic revenue at Germany's international airports increased by +4.7% in 2010

91% of the passenger volume of 189 million is allotted to the TOP 10 airports



*excl. transit flights

Business tourism/travel within the German tourism sector

Overview of market segments

Business trips (with overnight stay)

72.5 m Germany¹

Spending: **39.0 bn €**¹

10.7 m guests from Europe²

Spending: **7.5 bn €**²

1.4 m guests from overseas^{2*}

Spending: **5.0 bn €**^{2*}

Day business trips (DBT)³

315.4 m classic DBT

122.6 m at seminars/trainings

59.4 m at meetings/conventions

42.7 m at fairs/exhibitions

Total: 540 m in Germany

Spending: **14.0 bn €**

Total spending: **66 bn €**

¹ Source: GNTB/TNS-Infratest

² Source: GNTB/IPK ³ Source: BMWI/DWIF

* estimate

Trade fair locations/exhibitors

as of January 2011

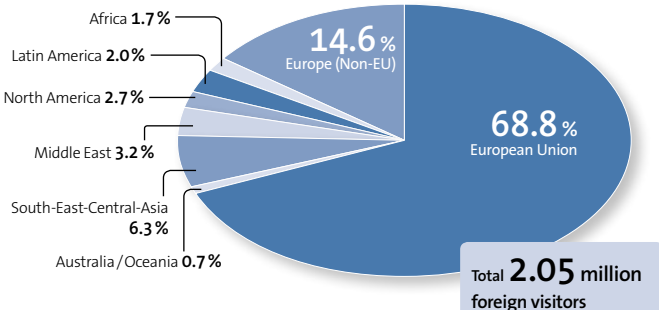
The six largest trade fair and exhibition centres in Germany in 2010 were:

Location	Indoor area (gross in sqm)	Outdoor area (gross in sqm)	Ranking worldwide
Hanover	495,265	58,070	1
Frankfurt/Main	345,697	95,721	4
Cologne	284,000	100,000	5
Duesseldorf	262,704	43,000	6
Munich	180,000	360,000	18
Berlin	160,000	100,000	20

Source: AUMA 2011 (8)

Trade Fairs in Germany

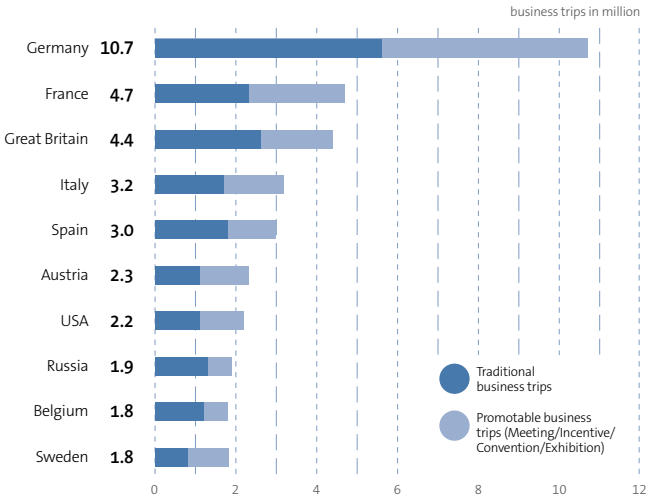
Foreign visitors 2009/ AUMA category international and national events



Business travel destinations for Europeans

Source: GNTB/WTM 2011 (5)

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



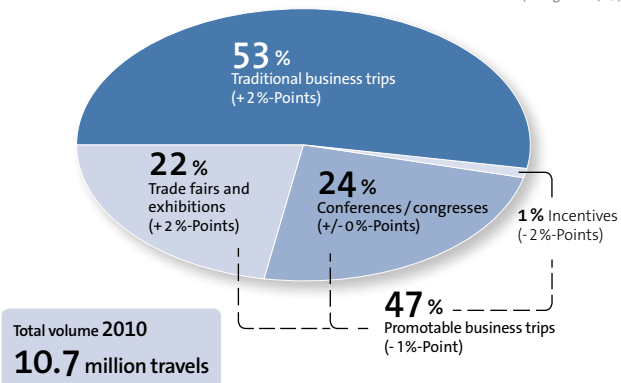
Types of business trips

Source: GNTB/WTM 2010 (5)

Breakdown of European business travel volume into different types of business trips to Germany 2010

Nearly 50% promotable business trips

Share (change 2010/09)



Reasons for travel among Europeans

Source: GNTB/WTM 2011 (5)

Reasons for travel among Europeans travelling abroad and to Germany in 2010

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

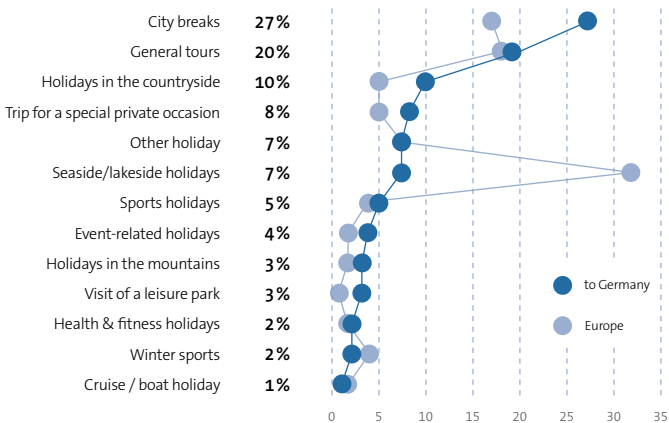
Reason for travel	Europe 2010 in million *	Germany 2010 in million *	Europe 2010 Percentage *	Germany 2010 Percentage *
Holidays	286.7	21.4	71.6%	53.8%
Short breaks of 1–3 nights	63.9	9.4	16.0%	23.6%
Longer holidays of 4+ nights	222.8	12.0	55.6%	30.2%
Visits to friends or relatives	23.8	3.9	5.9%	9.8%
Other travel	32.0	4.0	8.0%	10.1%
Business trips	58.0	10.7	14.5%	26.9%
Total travel	400.6	39.8	100%	100%

Holiday preferences

Source: GNTB/WTM 2011 (5)

Ranking of holiday contents of Europeans in Germany 2010 as a percentage

In 2010 Germany's strengths lay in city/event breaks and general tours



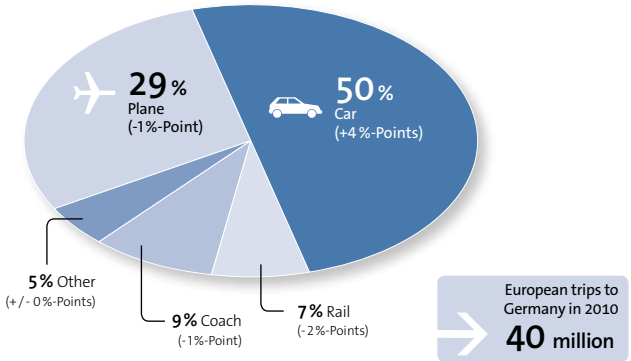
Transport/Modal split

Source: GNTB/WTM 2011 (5)

Car and plane travel more popular again in 2010

All trips from Europe to Germany in 2010: 40 million

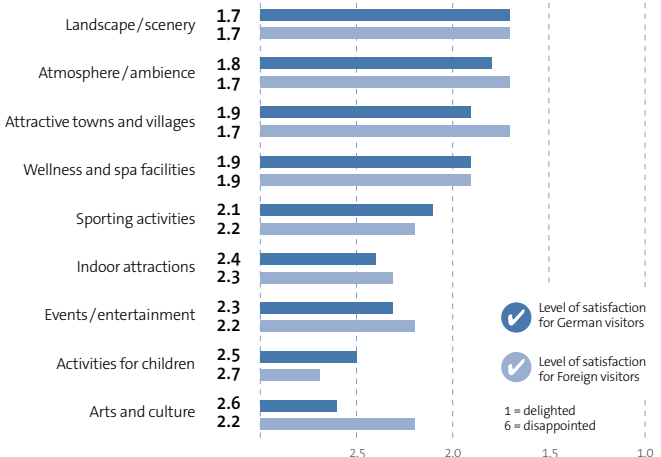
Share (change 2010/09)



Satisfaction of holidaymakers

Source: GNTB/ERV 2011 (14), rounded values

Satisfaction of holidaymakers in Germany with individual aspects

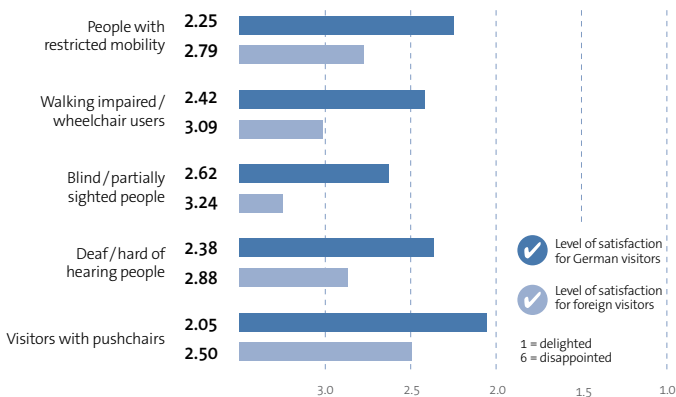


Disabled-Friendliness

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 2011 (4), GNTB 2010 (6)

Source markets in Northwest and Southwest Europe

With a total of 30.3 million overnight stays in 2010, the source markets of Northwest and Southwest Europe have a 50% share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2010	Forecast OS 2020 *	Population in millions ¹
Northwest Europe	18,142,074	21,200,000	94.4
Netherlands	10,483,114	11,000,000 to 13,300,000	16.7
UK and Rep. of Ireland	4,512,029	4,300,000 to 5,400,000	66.5
Belgium	2,639,425	2,700,000 to 4,000,000	10.7
Luxembourg	507,506	800,000	0.5
Southwest Europe	12,147,646	18,200,000	175.6
Switzerland	4,186,422	4,200,000 to 7,100,000	7.6
Italy	3,295,849	5,100,000	60.1
France	2,735,869	3,600,000	62.6
Spain	1,929,506	3,800,000	45.3
Total	30,289,720	39,400,000	270.0



Overnight stays by foreign visitors

2010: **30.3 mn** 2020: **39.4 mn**

Source markets in Northeast Europe

Source: Federal Statistical Office 2011 (4), GNTB 2010 (6)

Source markets in Northeast Europe/Russia

With 8.5 million overnight stays in 2010, the source markets of Northern and Eastern Europe/Russia have a 14% share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2010	Forecast OS 2020	Population in millions ¹
Northeast Europe/ Russia	8,497,163	10,800,000	210.2
Denmark	2,528,220	2,600,000 to 3,800,000	5.5
Sweden	1,514,850	1,600,000 to 1,800,000	9.3
Russia	1,486,471	2,000,000	140.4
Poland	1,380,549	1,600,000	38.0
Norway	733,407	900,000	4.9
Finnland	574,818	900,000	5.3
Baltic States	278,848	500,000	6.8



Overnight stays by foreign visitors

2010: **8.5 mn**

2020: **10.8 mn**

Source markets in Southeast Europe

Source: Federal Statistical Office 2011 (4), GNTB 2010 (6)

Source markets in Southeast Europe

With a total of 4.4 million overnight stays in 2010, the source markets of Southeast Europe have about a 7% share of all overnight stays in Germany by foreign visitors

Markets	Overnight stays 2010	Forecast OS 2020	Population in millions ¹
Southeast Europe	4,400,570	6,300,000	36.3
Austria	2,838,779	2,900,000 to 4,470,000	8.4
Czech Republic	672,257	780,000	10.5
Hungary	510,219	550,000	10.0
Slovakia	220,444	720,000	5.4
Slovenia	158,871	580,000	2.0



Overnight stays by foreign visitors

2010: **4.4 mn**

2020: **6.3 mn**

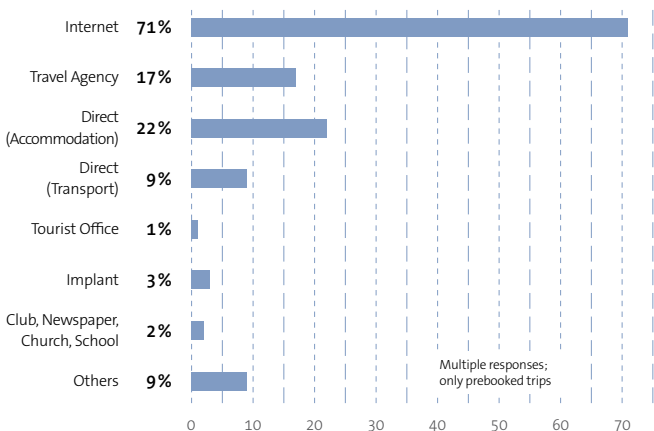
Travel arrangements

Source: GNTB/WTM 2011 (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

Booking Channels/Sites in % (2010)



Source markets in America /Israel

Source: Federal Statistical Office 2011 (4), GNTB 2010 (6)

Source markets in America /Israel

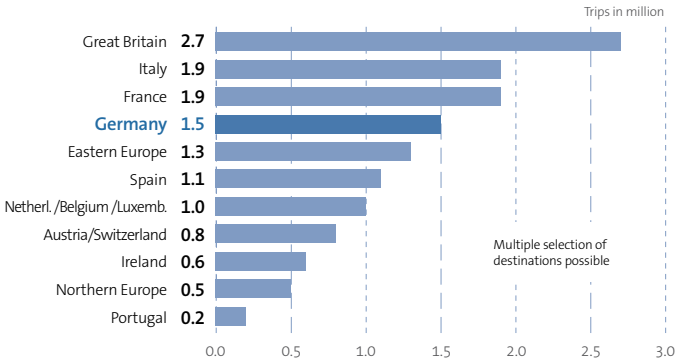
With about 7 million overnight stays in 2010 the source markets in America and Israel have a 11 % share of all overnight stays in Germany by foreign visitors. USA with a total of 4.8 million overnight stays in 2010 is the main overseas source market

Markets	Overnight stays 2010	Forecast OS 2020	Population in millions ¹
America /Israel	6,855,397	8,300,000	941.8
USA	4,769,373	5,900,000	317.6
Canada	579,401	850,000	33.9
Brazil	482,319	830,000	195.4
Central-/South America	519,098	k.A.	583.0
America total	6,350,191	7,600,000	934.5
Israel	505,206	700,000	7.3

Overnight stays by foreign visitors
 2010: **6.9 mn** 2020: **8.3 mn**

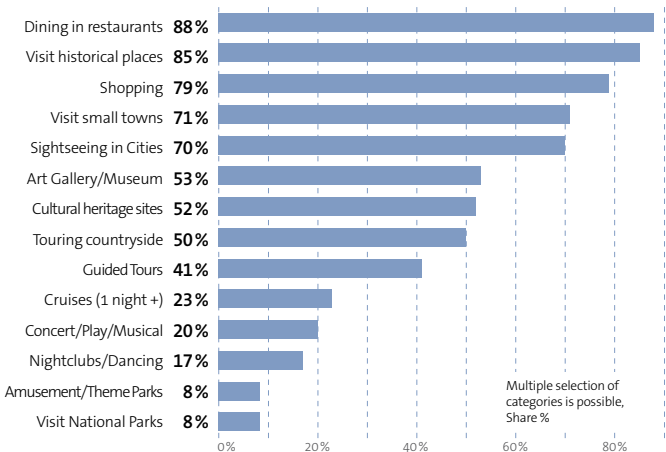
Main travel destinations for US Americans in Europe

Total travel from the USA to Europe 2009: 10.6 million trips



Dining, Sightseeing and shopping are the dominant holiday activities of US Americans in Germany

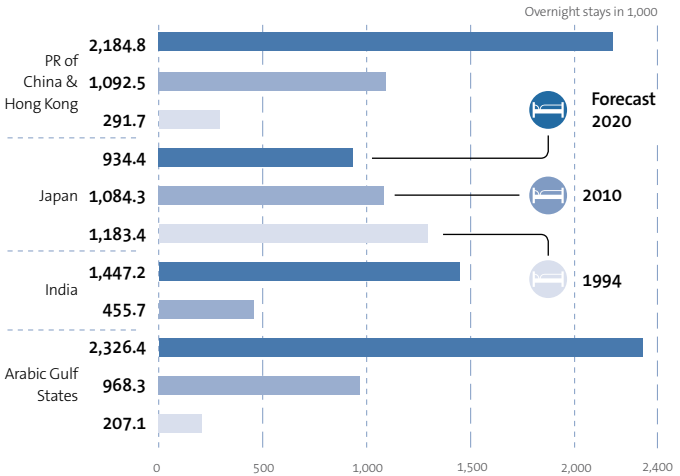
Holiday activities in Germany (US citizens who travel abroad)



Asian source markets

Source: Federal Statistical Office 2011 (4), GNTB 2010 (6)

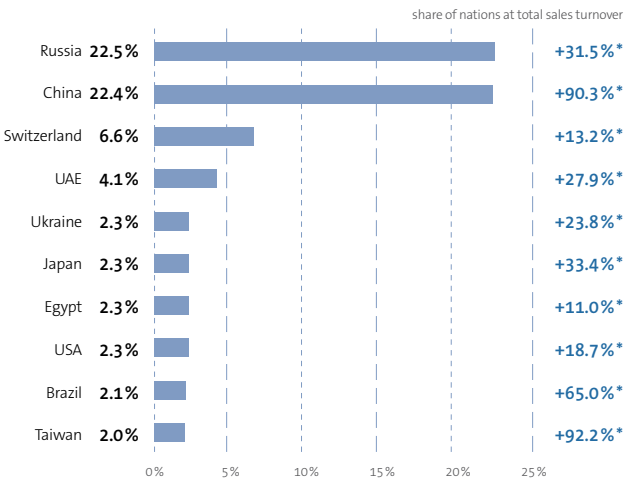
China will become the most important Asian source market for Germany in the near future



Tax-Free Shopping

Source: Global Blue 2011 (12)

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



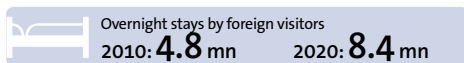
Other source markets

Source: Federal Statistical Office 2011 (4), GNTB 2010 (6)

Source markets Asia, Australia and Africa

With about 4.8 million overnight stays in 2010, the source markets Asia, Australia and Africa have a share of about 8% of all overnight stays in Germany by foreign visitors

	Overnight stays 2010	Forecast OS 2020 *	Population in million ¹
Asien/Australien/Afrika	4,755,553	8,400,000	2,876.5
China / Hong Kong	1,092,470	2,200,000	1,361.8
Japan	1,084,285	900,000	127.0
Arabic Gulf States	968,336	2,300,000	39.2
Australia, New Zealand and Oceania	710,952	900,000 ²	35.0
India	455,655	1,500,000	1,214.5
South Korea	294,829	600,000	48.5
South Africa	149,026	k.A.	50.5



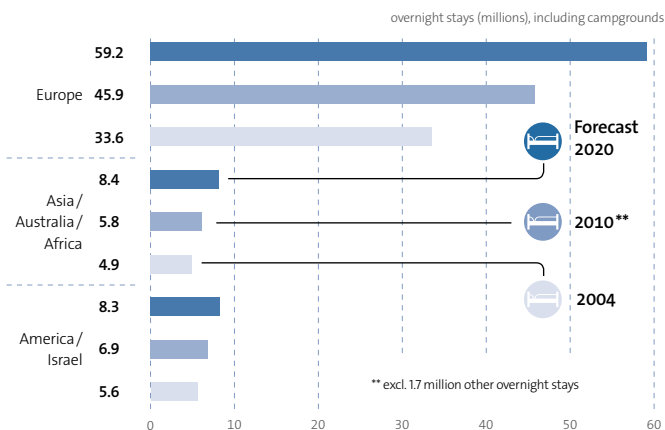
¹ data 2010 ² Australia only

GNTB growth outlook

Source: Federal Statistical Office 2011 (4), GNTB 2010 (6)

GNTB growth forecasts for 2020

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



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.

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