www.germany-tourism.de

Germany
Friendly business

Business Travel Market Germany 2007

Overnight business trips in Germany in 2007

Domestic: 72.8 million	g	€ 39 billion
European: 10.3 million	g	€ 8.4 billion
Overseas: 1.5 million	g	€ 5.3 billion

Business day trips in Germany in 2006 (BMWI/DWIF)

Domestic: 540 million	g	€ 14 billion

Total revenue from business trips

Domestic:	g	€ 66.7 billion

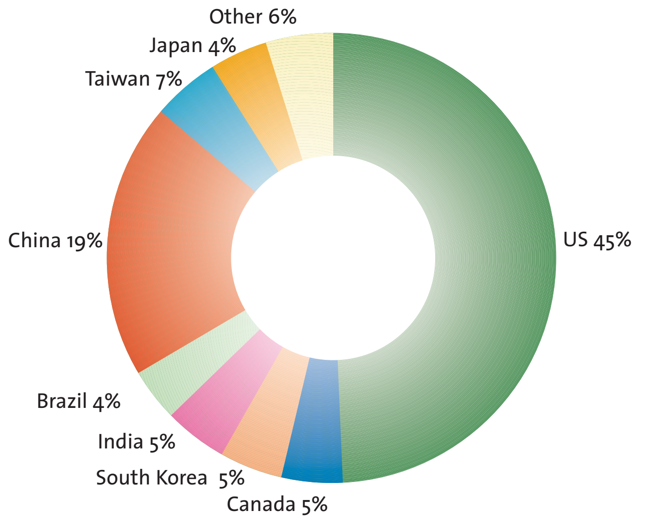
EVVC

GCB
Meetings made in Germany
German Convention Bureau

BUSINESS TRIPS TO GERMANY BY VISITORS FROM EURO

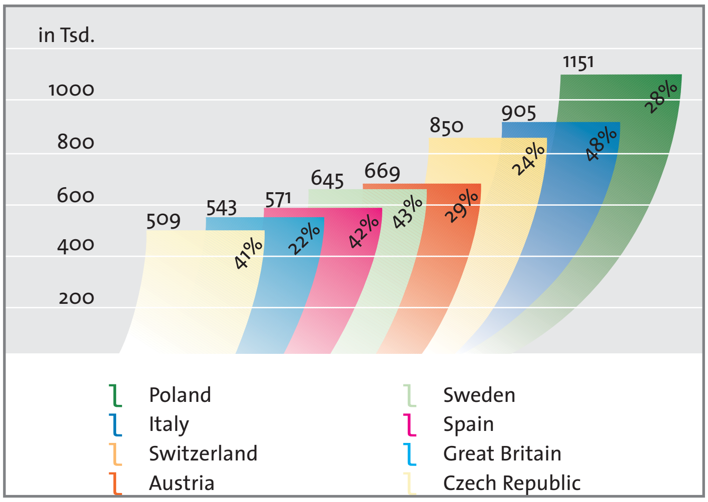



OVERSEAS SOURCE MARKETS (2006)

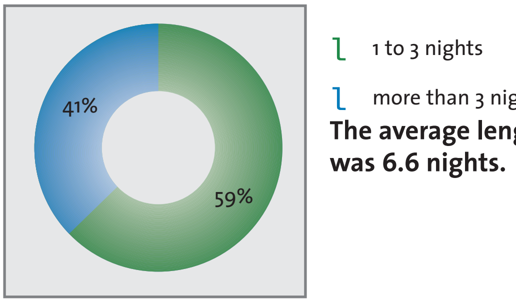


SOURCE MARKETS FOR BUSINESS TRAVEL

The key European source country for business travel to Germany is Poland with 1.1 million business trips and an 11 % market share, followed by Italy (900,000) and Switzerland (approx. 900,000). Germany has an average share of 29% of outbound business travel from European countries.



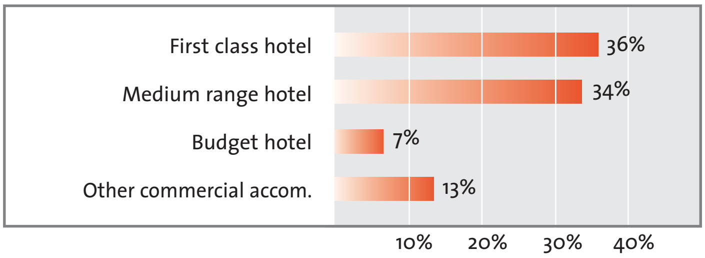
LENGTH OF STAY



The average length of stay was 6.6 nights.

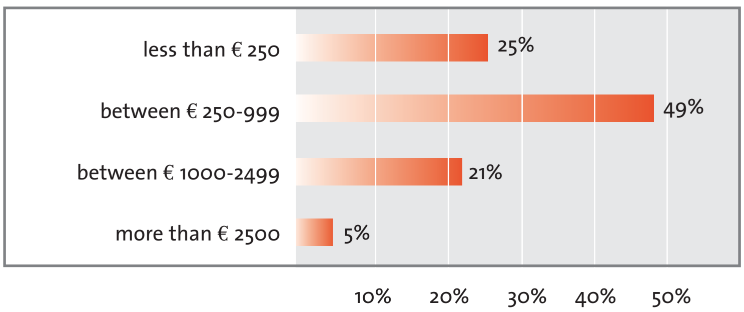
TYPE OF ACCOMMODATION

First-class hotels are the most popular choice for business travellers



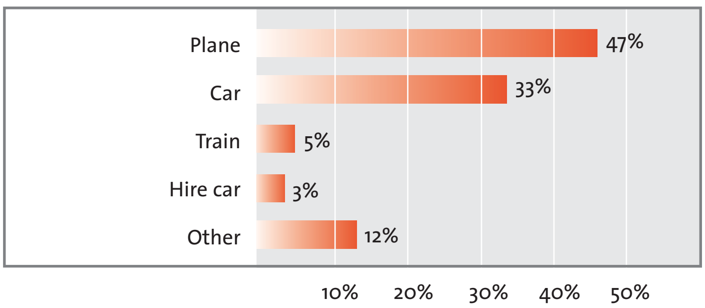
EXPENDITURE

The average spend per business trip was € 793.00; the average outgoings per night were € 124.00 (cf. € 78.00 for holidays).

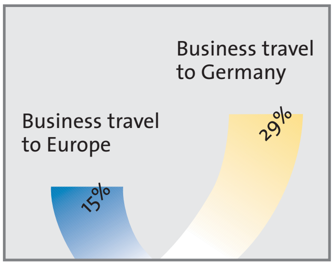


MEANS OF TRANSPORT

80% of business travellers fly to Germany or take their own car. Low-cost carriers account for 32% of flights



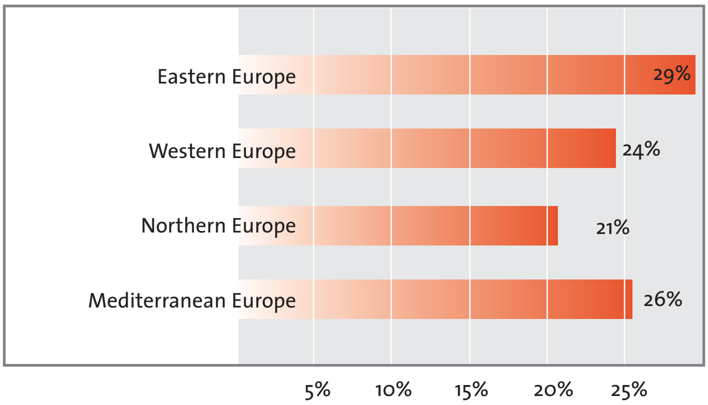
PE AND OVERSEAS



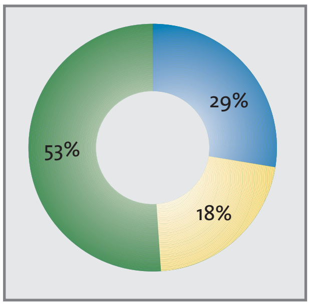
Germany's share of all outbound business trips involving an overnight stay is almost twice that of other European countries combined.

EUROPEAN SOURCE REGIONS

Northern, southern, eastern and western Europe each account for around one quarter of all business trips to Germany.



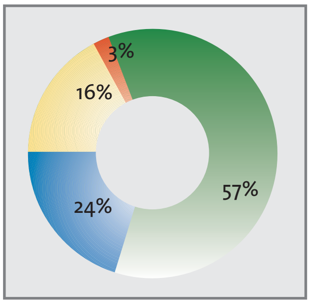
TYPES OF TRAVEL



- 18.8 million holidays
- 10.3 million business trips
- 6.5 million trips to visit friends

Business trips from Europe, Germany's most important market, rose by an impressive 7.4% to 10.3 million in 2007.

TYPES OF BUSINESS TRAVEL

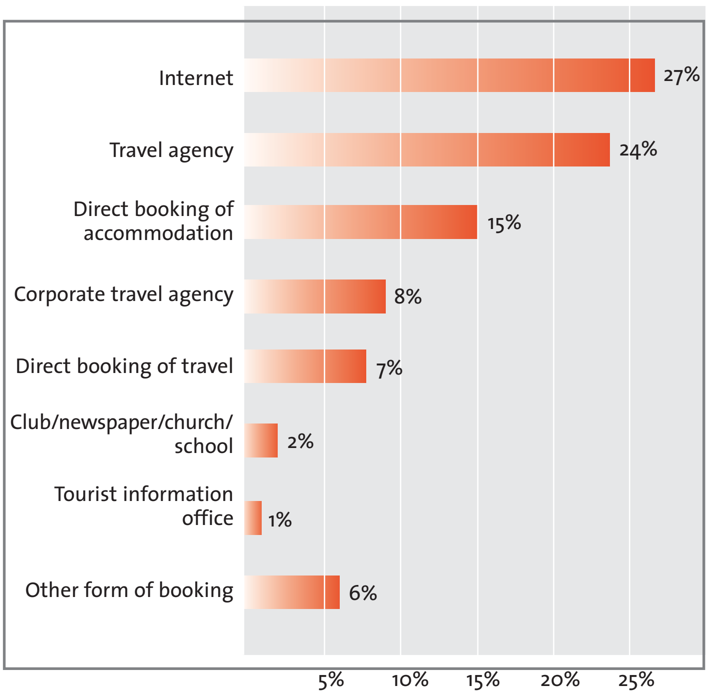


- Traditional business trip
- Conference, convention, seminar
- Trade fair, exhibition

Germany: the world's no. 1 trade fair destination and Europe's no. 1 for conferences and seminars.

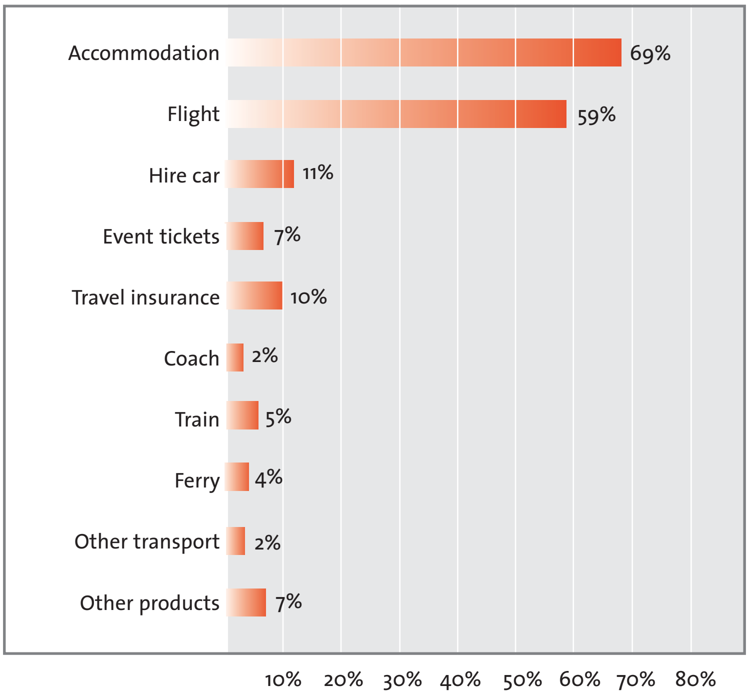
BOOKING POINT

For 68% of all business travel to Germany, at least one part of the trip was booked in advance. The Internet was the most popular channel for this.



BOOKING ELEMENTS

Accommodation and flights were the business trip elements most commonly booked in advance.

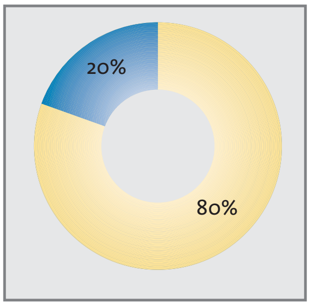


Source: GNTB/IPK European Travel Monitor 2006/2007

GERMANS ON BUSINESS TRIPS IN GERMANY

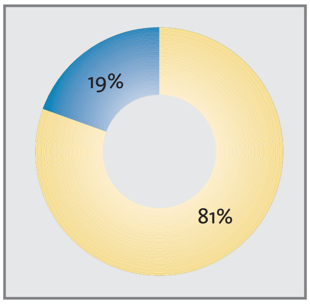


VOLUME AND CATEGORY OF BUSINESS TRAVEL



- 72,3 million trips within Germany
- 18.3 million trips abroad

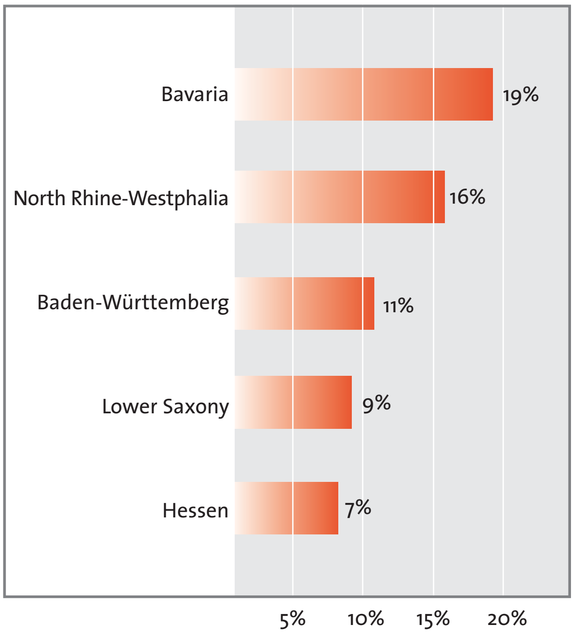
In 2007, almost 90 million business trips involving an overnight stay originated from the German source market.



- Trips by people from western Germany
- Trips by people from eastern Germany

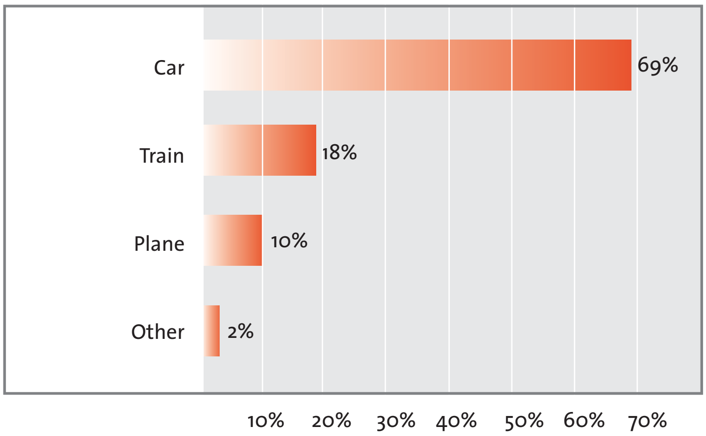
Western Germany accounts for 81% of domestic business trips, eastern Germany 19%.

The most frequently visited regions for domestic business trips are more or less the same as the most important source regions.



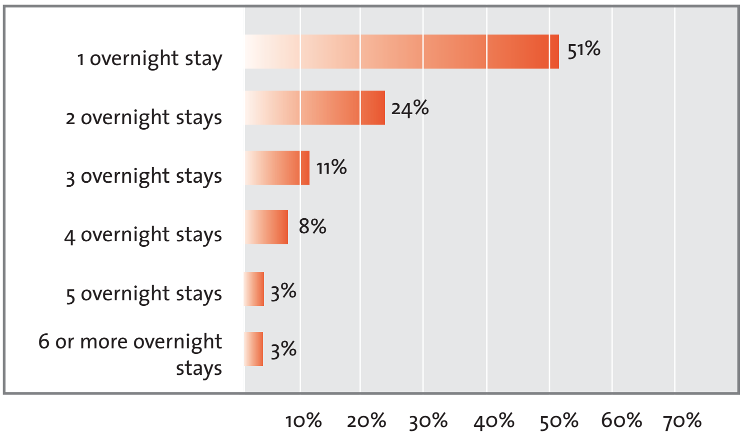
MEANS OF TRANSPORT

The most common way to travel on overnight business trips was by car (60%). It was also the most popular mode of transport for all other types of business travel.



LENGTH OF STAY

Three quarters of all business trips included an overnight stay of one or two nights; the average was 3 overnight stays.



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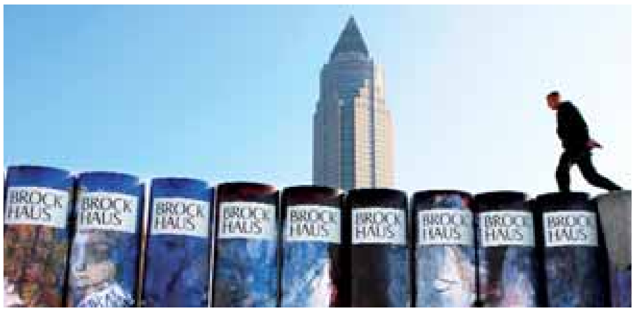
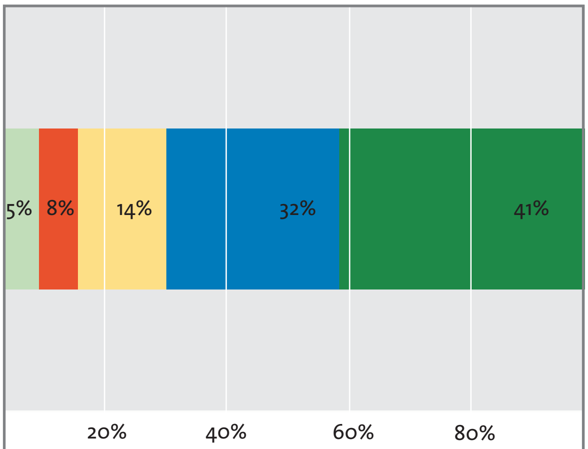
Sources
TNS Infratest market research
on behalf of the GNTB and German Convention Bureau.
In-depth study of the market for overnight business trips in Germany.
Munich, March 2008.
Representative sample of 60,000 surveyed using CATI
Figures based on 4,468 overnight business trips in 2007 by German residents aged 18 and above.



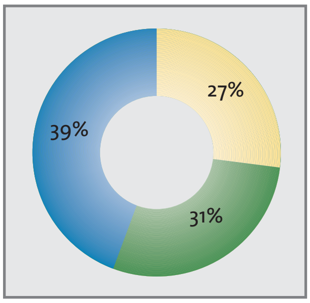


Visits to conferences/events

Customer visits

Visits to trade fairs/exhibitions

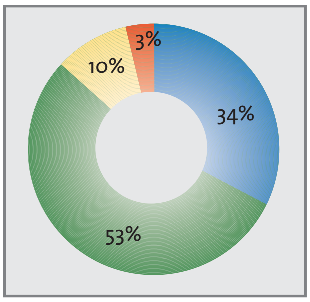
Visits to branches



Nationwide trade fair/exhibition

International trade fair/exhibition

14% of domestic business trips are to trade fairs/exhibitions, most of which are international in scope (39%).



Training

Conferences/seminars/conventions

Events

Trips to conferences/events account for a combined total of 41%.
Over half of all trips are for training purposes.

EXPENDITURE

Germans spent around € 39 billion on overnight business trips in their own country (not including private outgoings by family/friends/partners etc.); a further € 10 billion was spent on foreign business travel.
At 58%, visits to conferences/events account for the largest share of expenditure.

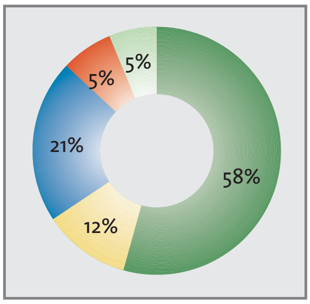
- The average spend for domestic business trips involving an overnight stay was € 538.
- Transport and accommodation costs accounted for around half of this.
- Accommodation expenditure was mainly for three and four star hotels.
- Conference and event fees amounted to a sizeable total of around € 11 billion.

Expenditure on domestic business trips in million

€ 36.637	business-related
€ 1.838	private outgoings
€ 1.010	family/friends/partners

Expenditure on business trips by foreign visitors in million

€ 9.487	business-related
€ 391	family/friends/partners
€ 236	private outgoings



€ 22.4 billion: conferences/events
€ 8.0 billion: customer visits
€ 4.7 billion: trade fairs/events
€ 1.8 billion: branch visits
€ 1.7 billion: other

Accommodation: € 154.00 | Transport: € 117.00 | Other: € 268.00

EITW (European Institute for the Meetings Industry)
on behalf of the GNTB, German Convention Bureau and European Association of Event Centres.
Meetings and Events Barometer, Wernigerode, April 2008.
Online questionnaires were used to survey more than 3,000 German service providers, around 37,000 event organisers in Europe and over 600 experts worldwide.

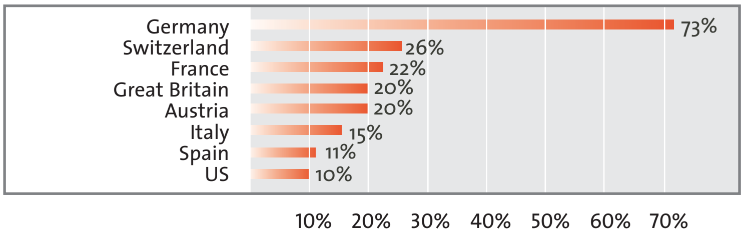
IPK International – World Travel Monitor Company Ltd.
on behalf of the GNTB.
World Travel Monitor 2006/2007, Munich, March 2008.
Representative survey of Europeans' travel behaviour in 35 countries
(Based on all forms of outbound travel by over 15 year-olds that involved at least one overnight stay).

EVVC GCB

TRIPS TO CONFERENCES/EVENTS WITHIN GERMANY

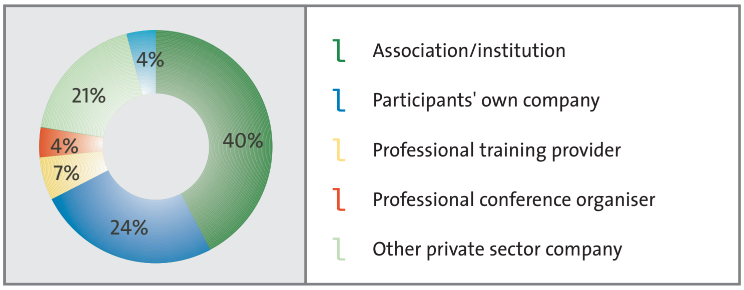
CHOICE OF COUNTRY

At 73%, Germany was the most popular destination among Germans for conferences and events. In 2006, almost 90% of trips by Germans to conferences and events were made in their own country.



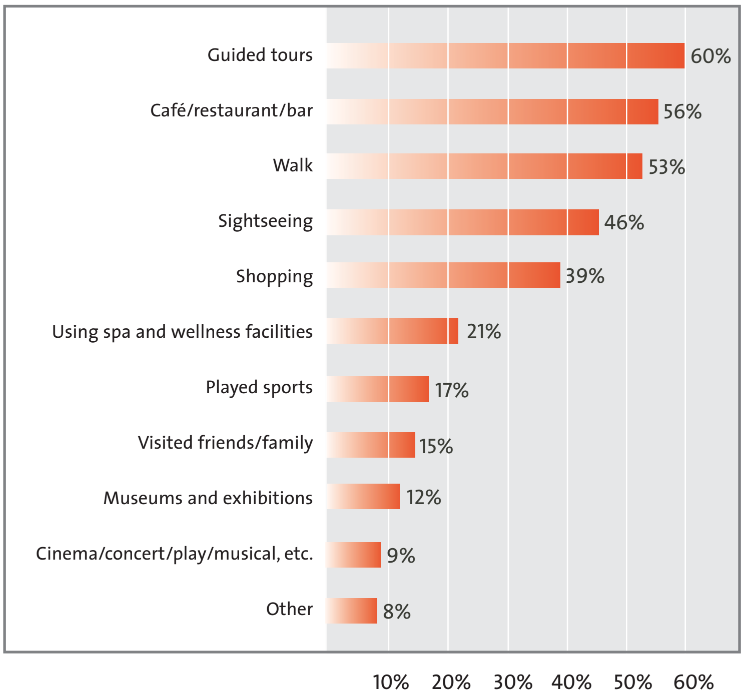
EVENT ORGANISERS

Demand split equally between associations, institutions and the private sector.



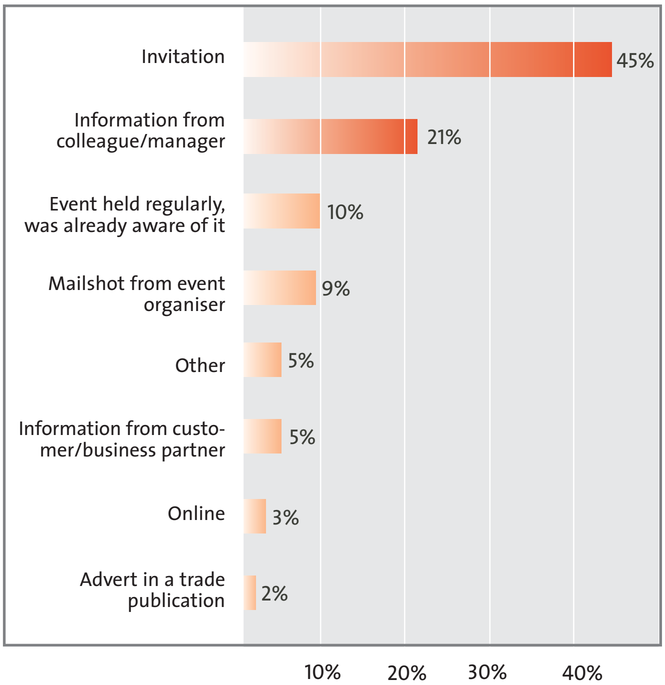
LEISURE ACTIVITIES

On 40% of event-related trips, people also took the chance to engage in recreational activities. Guided tours were the most popular choice.



COMMUNICATION CHANNELS

Participants mainly heard about the event they attended through an invitation.



MOTIVATION

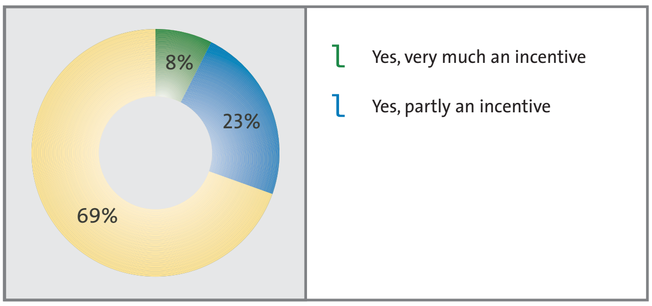
1 (very important) to 5 (not important at all)

The key motivating factors for attending conferences/events were to gather information, share ideas and experiences and receive training.

Gather information	1.8
Share ideas and experiences	1.9
Receive training	1.9
Discussions with trade professionals	2.1
Meet and talk with colleagues	2.2
Maintain existing contacts	2.4
Make new contacts	2.5
Sent by employer	2.8
Contact with customers/ business partners	2.9

TRAVEL AS INCENTIVE

Two thirds of participants did not consider their trip to the conference/event to be an incentive.

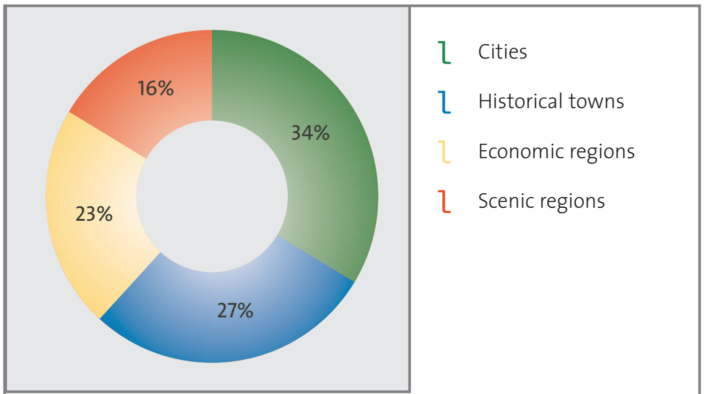


Source: TNS Infratest market research

THE EXPERTS' VIEWS ON THE CONFERENCE MARKET

CONFERENCE AND EVENT DESTINATIONS

Just under two thirds of the experts surveyed throughout the world thought cities and historical towns were the best places to hold conferences and events in Germany.

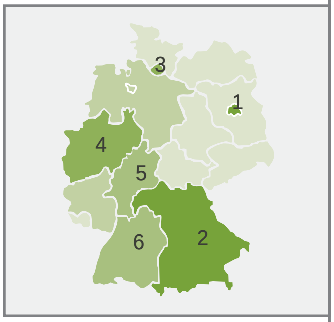


Cities:	population over 500,000
Historical towns:	e.g. Lübeck, Mainz, Regensburg
Economic regions:	e.g. Rhine-Main conurbation
Scenic regions:	Alps, Mittelgebirge (low mountain ranges), rivers and lakes

Metropolitan areas and strong economic regions are the dominant event destinations in Germany.

1. Berlin
2. Munich
3. Stuttgart
4. Frankfurt/Main
5. Cologne
6. Hamburg
7. Düsseldorf
8. Hanover
9. Essen
10. Dresden

Berlin, Hamburg and the federal states in southern and western Germany are currently more popular than those in the east.

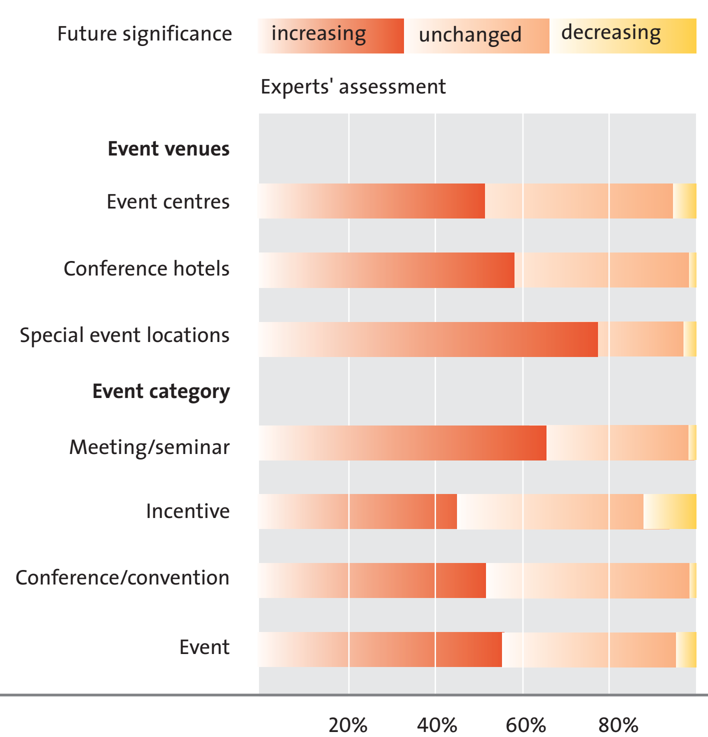


1. Berlin
2. Bavaria
3. Hamburg
4. North Rhine-Westphalia
5. Hessen
6. Baden-Württemberg

Conferences and event facilities in Germany: Facts & figures (Source: EITW, the European Institute for the Meetings Industry)

- Conference hotels led the market in terms of numbers, with 50.9% of the 64,000 conference rooms.
- Events centres accounted for most of the conference space, with 88.6% of the total floor space available.
- On average, conference rooms were occupied between 43% and 48% of the year, depending on the category.
- Conference hotels specialising in seminars and meetings had the highest average occupancy rate of 139 days.
- Because they stage more complex events, event centres required a far higher number of days to set up, dismantle and rehearse.
- 48% of all events were corporate meetings. Next were social functions (15%), followed by arts and entertain ment (16%).
- 51% of all conferences were attended by no more than 50 participants.
- 68% of event organisers spend no more than €500,000 annually on meetings/events.

OUTLOOK







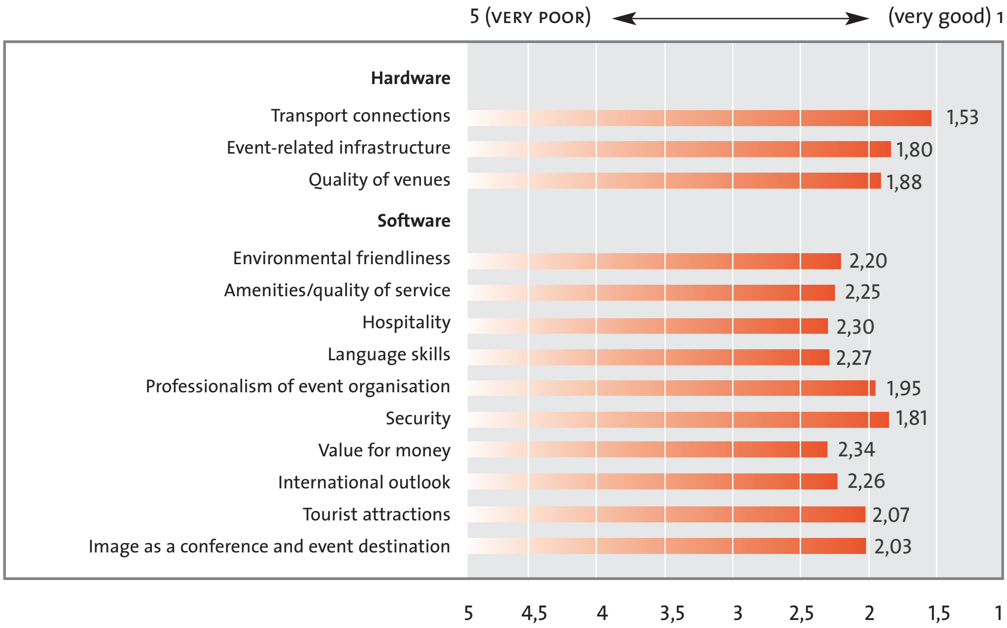
COMPARISON WITH OTHER LEADING DESTINATIONS

A worldwide survey of experts ranks Germany as Europe's number 1 destination for business travel:

1. Germany
2. France
3. UK
4. Spain
5. Austria
6. Switzerland
7. Italy
8. Belgium
9. Netherlands
10. Sweden

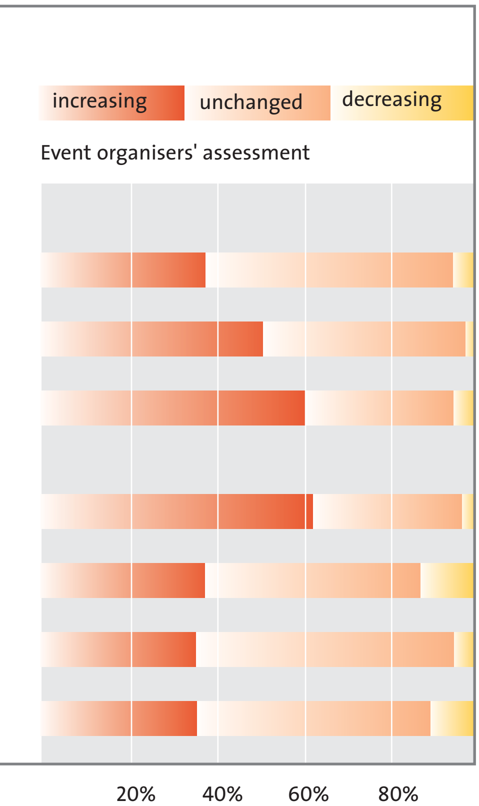
- 96% of organisers consider personal recommendations to be "important" or "very important" in the search for a location.
- Good transport infrastructure and a central location (e.g. in a town, region) are the most important criteria in the choice of venue.

Around 95 per cent of the organisers surveyed in Europe rated Germany as "the same" or "better" than other leading European conference and event destinations. Their assessment of Germany's "hardware" (e.g. conference infrastructure, sights and attractions) and "software" (e.g. security, service) was "good" or "very good".



Outlook for the German conference and events market:

1. Meetings and seminars will increase in significance
2. Experts more optimistic than event organisers, particularly with regard to events sector
3. Uncertain outlook for incentive travel



65%	The number of events held on companies' own premises will increase.
78%	The number of conferences and events held externally (e.g. in conference centres, special event locations and conference hotels) will increase.
92%	Virtual communication channels will not replace personal contact.
87%	Demand for face-to-face meetings will rise overall.
96%	Professional scripting and staging of conferences and events will become increasingly important
80%	Environmental factors will take on a much greater significance for event organisers
51%	Company (organiser) budgets for the MICE (Meetings, Incentives, Conventions, Events) sector will increase.
83%	Germany's image as a destination for conferences and events is continually improving.

Source: European Institute for the Meetings Industry