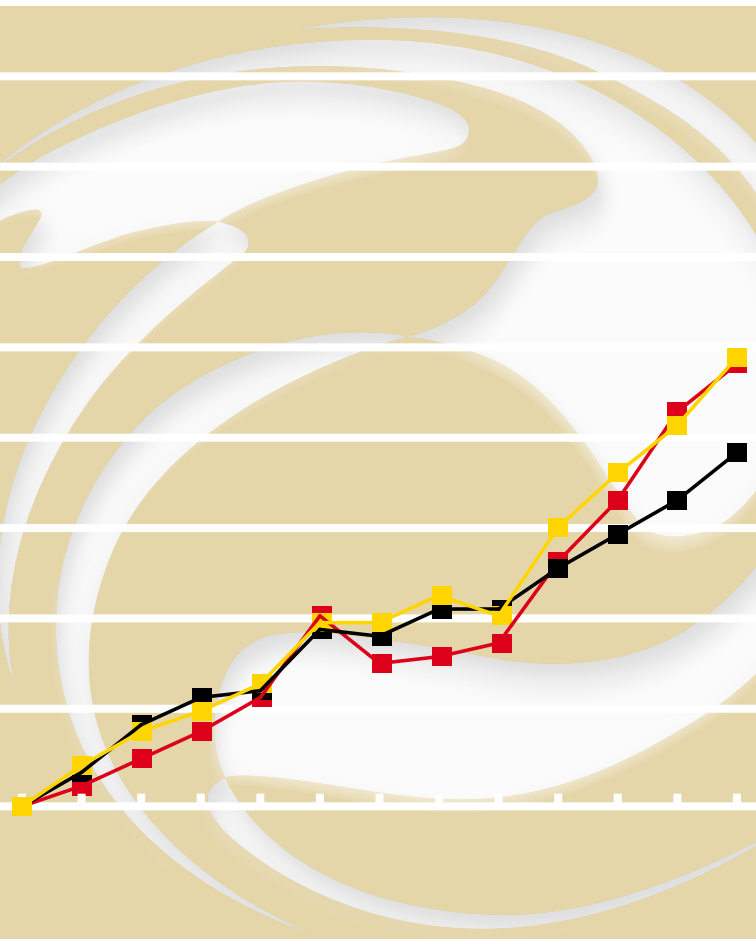




German National Tourist Board

Incoming-Tourism Germany

Edition 2009



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Introduction

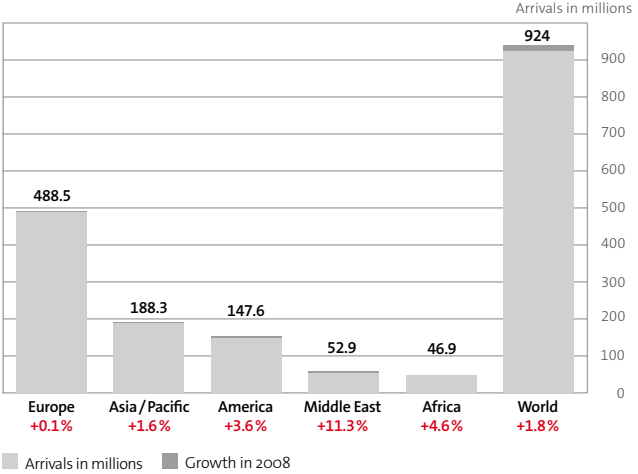
To coincide with and the Germany Travel Mart (GTM) 2009 in the Hanseatic City of Rostock and the IMEX 2009 in Frankfurt/Main, the GNTB is publishing a summary of key facts and figures for incoming tourism to Germany.

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 from 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

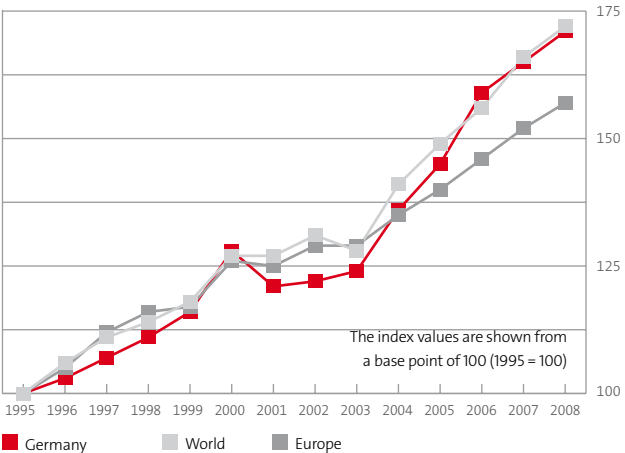
According to the UNWTO, 924 million (+ 1.8%) international arrivals were recorded in 2008



Source: UNWTO 2009 (1)

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 2008



Source: UNWTO 2009 (1), Federal Statistical Office 2009 (4)

Economic importance of tourism

Contribution of Travel & Tourism economy 2009

Direct and indirect effects of tourism

Rank	Country	US-\$ bn
1	USA	1,356.9
2	Japan	479.3
3	China	449.3
4	France	278.2
5	Germany	267.3
6	Spain	251.5
7	Italy	212.5
8	UK	200.1
9	Mexico	133.8
10	Canada	110.4

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 2009 (2)

Contribution of Travel & Tourism industry 2009

Direct effects of tourism

Rank	Country	US-\$ bn
1	USA	503.4
2	Japan	177.6
3	China	107.3
4	France	103.6
5	Spain	93.7
6	Italy	85.8
7	UK	76.2
8	Germany	72.6
9	Mexico	44.8
10	Australia	36.9

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 2009 (2)

Travel & Tourism Demand /Capital Investment (CI) in the Travel & Tourism economy in 2009

Rank	Country	T & T Demand in US-\$ bn
1	USA	1,640.3
2	Japan	556.1
3	China	526.6
4	Germany	438.4
5	France	378.1
6	Spain	310.0
7	UK	307.2
8	Italy	281.0
9	Canada	176.8
10	Mexico	158.2

Source: TSA/WTTC 2009 (2)

Rank	Country	CI in US-\$ bn
1	USA	262.3
2	China	165.4
3	Japan	65.2
4	Spain	60.0
5	Italy	39.3
6	France	38.3
7	Russia	36.5
8	Germany	32.8
9	UK	31.0
10	Australia	30.9

Source: TSA/WTTC 2009 (2)

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 2008: **+1.8%**, Europe **+0.1%**

Source: UNWTO 2009 (1)

Countries with the highest number of internet users in Europe

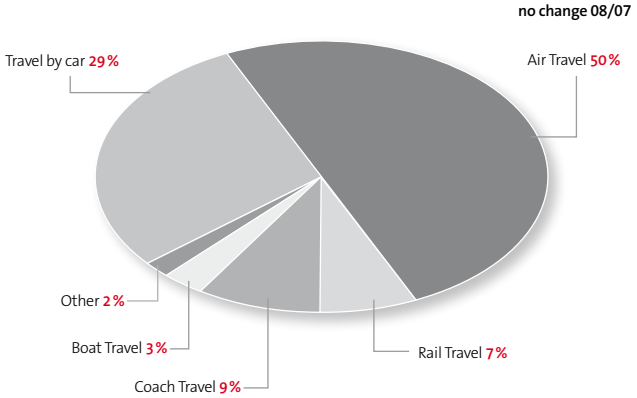
Ranking	Country	No. of users (million)	% of population
1	Germany	55.2	67.0
2	Great Britain	43.2	70.9
3	France	40.1	64.6
4	Italy	28.3	48.6
5	Spain	27.0	66.8
6	Poland	20.0	52.0
7	Netherlands	13.8	82.9
8	Romania	7.4	33.4
9	Sweden	7.3	80.7
10	Belgium	7.0	67.3
Total 1 to 10		249.4	62.2
Total EU		297.0	60.7

Source: Internet World Stats 04/2009 (12)

Modal split / hotel prices in Europe

Breakdown of international travel by Europeans according to form of transport in millions 2008

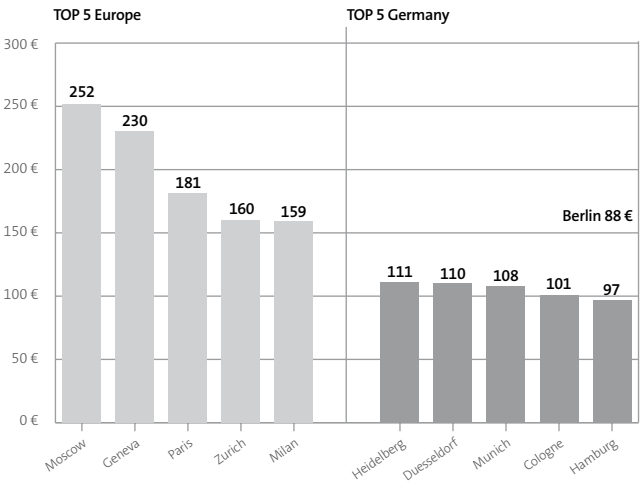
Travel by air and road are the dominant categories for travel throughout Europe. Total outbound trips by Europeans 2008: 422 million



Source: GNTB/WTM 2009 (5)

Comparison of hotel prices in European and German cities 2008

Germany has an excellent price/performance ratio in hotel accommodation



Source: IHA/STR Global 2009 (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)	2,492.0	
GDP per capita 2007 (in Euro)	30,342	
Real GDP growth (in %)	2006	+ 3.0
	2007	+ 2.5
	2008	+ 1.3
Economic importance of travel and tourism¹		
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%	
International arrivals 2008		
International arrivals in thousands (incoming)	24.9	
Arrivals per 100 of the population	30	
Travel and tourism in Germany 2008		
Overnight stays by domestic travellers (thousands)	313,043	
Domestic growth	+ 1.9%	
Overnight stays by international travellers (thousands)	56,537	
International growth	+ 3.2%	
Total overnight stays (thousands)	369,580	
Total growth	+ 2.1%	
of which hotel/guesthouse		
Overnight stays by domestic travellers (thousands)	173,028	
Overnight stays by international travellers (thousands)	45,218	
Total overnight stays (thousands)	218,246	
Number of hotel beds² (as of July 2008)		
Utilisation of available hotel beds	(2007: 36.7%)	36.5%
Outgoing travel 2008³		
Trips taken by Germans in thousands	302,200	
of which trips abroad in thousands	75,900	
No. of foreign trips per 100 of the population	63	
Inbound travel from Europe³		
Trips to Germany by Europeans (in thousands)	37,300	
Expenditure for travel to Germany	per trip/ person: 531 €	per night/ person: 79 €
Length of stay in Germany (average)	7.2 nights	
Travel and tourism balance of payments⁴		
Expenditure on travel and tourism	(08/07: + 2.3%)	€ 62.0 bn
Income from travel and tourism	(08/07: + 3.4%)	€ 27.2 bn
International balance of payments for travel and tourism	(08/07: + 1.3%)	€ - 34.8 bn
Expenditure for domestic travel 2008³		€ 65.9 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 2009 (5)

⁴ Deutsche Bundesbank, March 2009

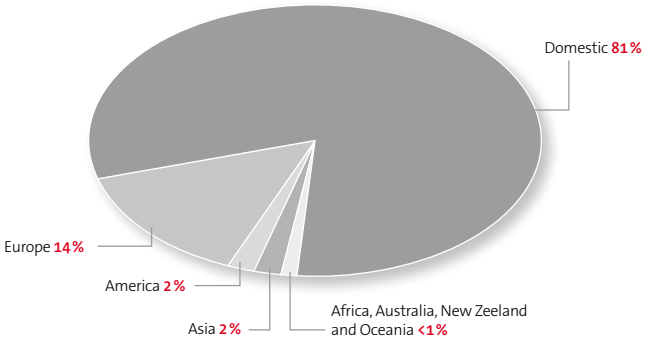
* excl. business travel, travel to visit friends and family, public investment

Source: Federal Statistical Office 2009 (4), GNTB 2009 (6)

Incoming Tourism – importance and breakdown

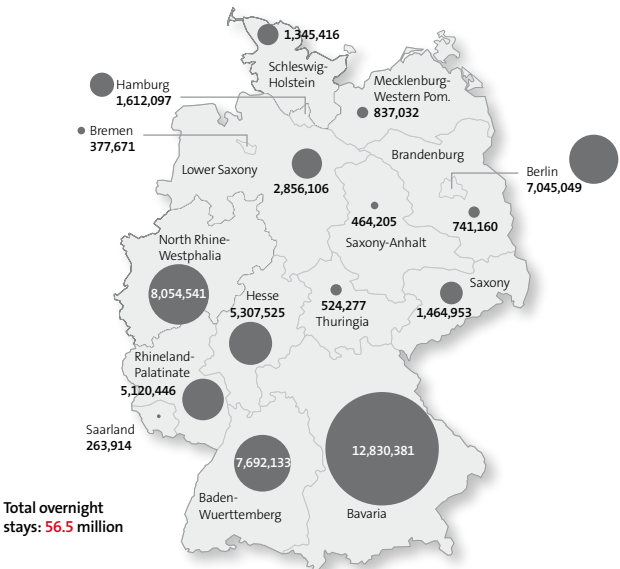
Breakdown of all arrivals in Germany in 2008 by continent

81 per cent of arrivals in Germany in 2008 were domestic trips and 19 per cent were incoming trips



Source: Federal Statistical Office 2009 (4)

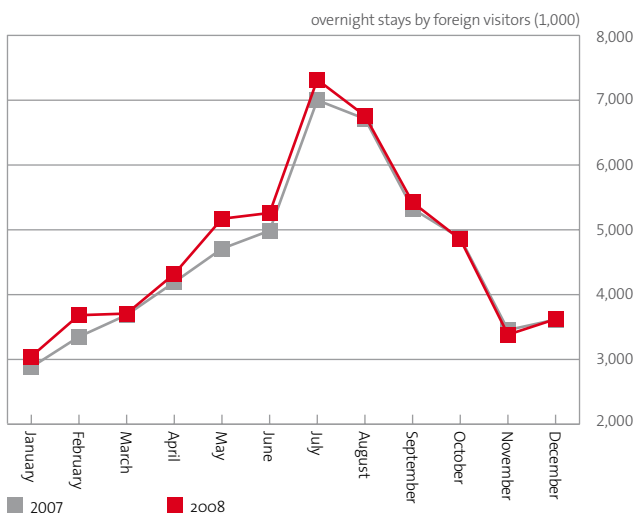
Overnight stays in Germany by foreign visitors in 2008 by federal state



Source: Federal Statistical Office 2009 (4)

Seasonal breakdown / accommodation capacities

Seasonal breakdown of overnight stays by foreign visitors travelling to Germany



Source: Federal Statistical Office 2009 (4)

Capacities in Germany by type of accommodation 2008

Type of accommodation	Accommodation capacity	
	Establishments in operation (as of July 2008)	Share in %
Hotels	13,281	25.5
Bed & breakfast hotels	8,074	15.5
Inns	9,165	17.6
Guesthouses	5,371	10.3
Traditional accommodation providers	35,891	68.8
Leisure, recreational and training centres	2,742	5.3
Holiday centres	93	0.2
Holiday homes or apartments	10,624	20.4
Holiday cottages, youth hostels	1,789	3.4
Preventative medical clinics and rehabilitation clinics	902	1.7
accommodation types*	52,143	100.0

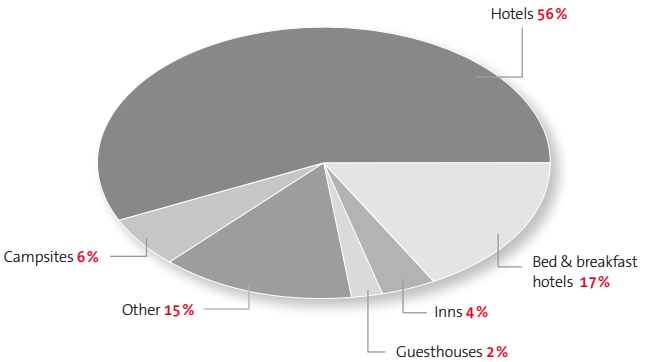
*including 102 boarding houses (recorded for the first time in 2004)

Source: Federal Statistical Office 2008 (4)

Types of accommodation / airports

Overnight stays in Germany by foreign visitors in 2008 by type of accommodation

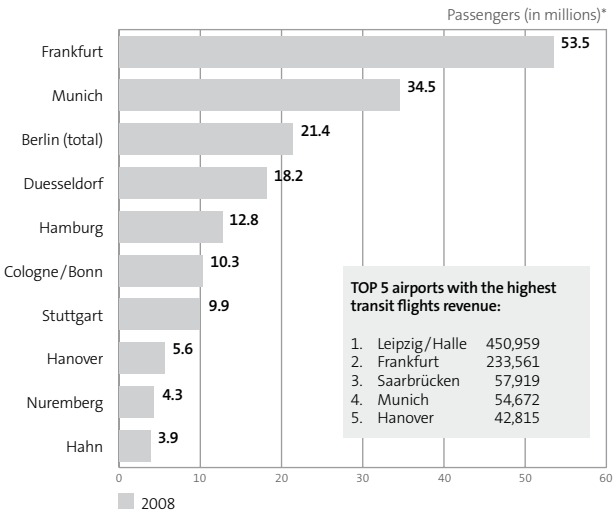
Hotels and bed & breakfast hotels: **73%** share of the market



Source: Federal Statistical Office 2009 (4)

Traffic revenue at Germany's international airports increased by 1.1% in 2008

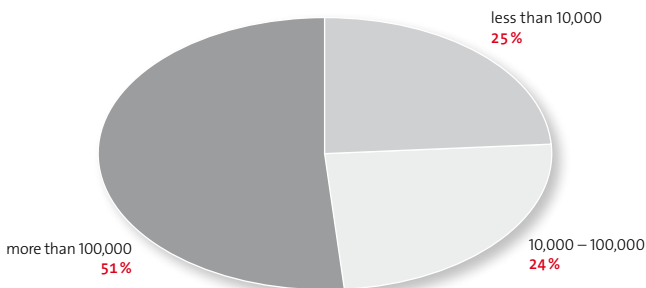
91% of the passenger volume of 191 million is allotted to the TOP 10 airports.



Source: ADV 2009 (14), * incl. transit flights

Breakdown of overnight stays in 2008 by foreign visitors in German towns and cities according to size

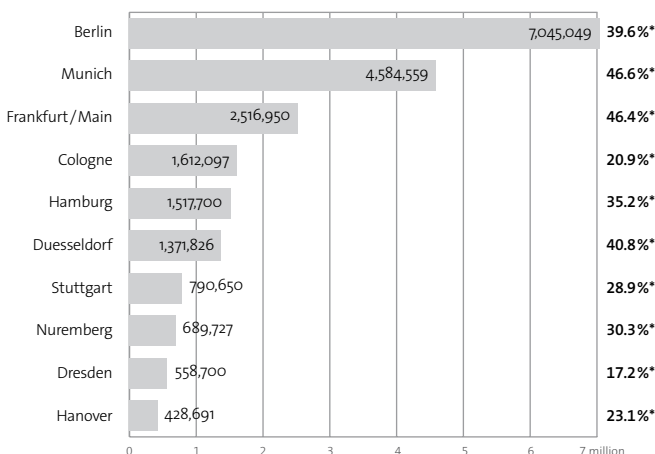
51% of overnight stays by foreign visitors are in towns and cities with a population of more than 100,000



Source: Federal Statistical Office 2009 (4)

Top towns and cities in Germany in 2008 (overnights 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 2009 (11), GNTB 2009 (6)

Business travel

Business tourism / travel within the German tourism sector

Overview of market segments

Business trips (with overnight stay)

72.5 m in Germany (2008)
Spending: 39.0 bn Euro
Source: GNTB/TNS-Infratest

10.4 m guests from Europe (2008)
Spending: 6.7 bn Euro
1.4 m* guests from overseas
Spending: 5.0 bn* Euro
Source: GNTB/IPK

Day business trips (DBT)

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 Euro
Source: BMWI/DWIF

Total spending: 65 bn Euro

*estimate

Source: GNTB 2009 (6)

Trade fair locations / exhibitors

The six largest trade fair and exhibition centres in Germany in 2009 were:

Location	Indoor area (gross in m ²)	Outdoor area (gross in m ²)	Ranking worldwide
Hanover	495,265	58,070	1
Frankfurt/Main	321,750	83,700	4
Cologne	284,000	100,000	5
Duesseldorf	251,038	32,500	6
Munich	180,000	255,000	18
Berlin	160,000	100,000	20

as of January 2009

Source: AUMA 2009 (8)

The German conference and congress market

General overview

Supply

Meeting and event venues
Total¹ 6,200

Convention and event centres (EC) 1,498
Meeting hotels (MH) 3,091
Special venues² 1,611

Total meeting rooms 64,000

Demand

Events 2.8 m

Average duration 1.4 days
Meetings 64%
Events 36%

Total attendees 314.0 m
There of international 5.3%

Meeting attendees 123.9 m
Event attendees 190.1 m

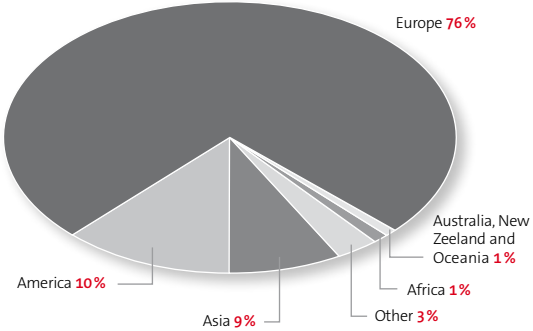
¹ Sites with at least 100 seats in the largest room (theatre-style seating)

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

Source: EITW 2008 (9)

Breakdown of overnight stays in Germany by continent

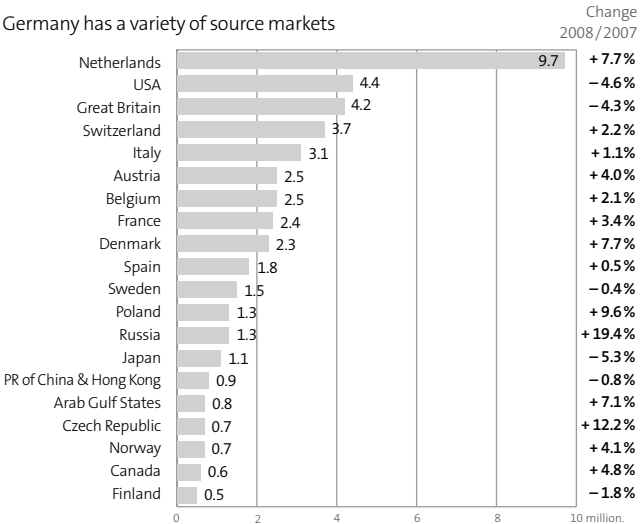
Europe has a growth rate of + 4.6% in 2008 and an increasing market share



Source: Federal Statistical Office 2009 (4)

Top 20 source markets for Germany by number of overnight stays in 2008

Germany has a variety of source markets



Source: Federal Statistical Office 2009 (4)

Reasons for travel among Europeans

Reasons for travel among Europeans travelling abroad and to Germany in 2008

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

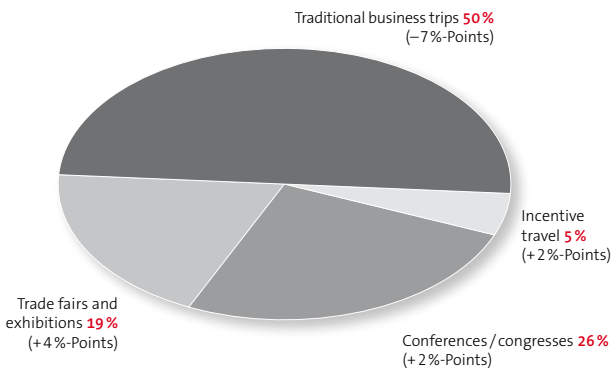
Reason for travel	Europe 2008 in millions ¹	Germany 2008 in millions ¹	Europe 2008 Percentage ¹	Germany 2008 Percentage ¹
Holidays	294	20	70%	54%
Short breaks of 1-3 nights	54	8	13%	22%
Longer holidays of 4+ nights	240	12	57%	31%
Visits to friends or relatives	28	3	7%	9%
Other travel	35	4	8%	10%
Business trips	64	10	15%	28%
Total travel	422	37	100%	100%

¹ Deviations are due to rounding differences

Source: GNTB/WTM 2009 (5)

Breakdown of European business travel volume into different types of business trips to Germany in 2008

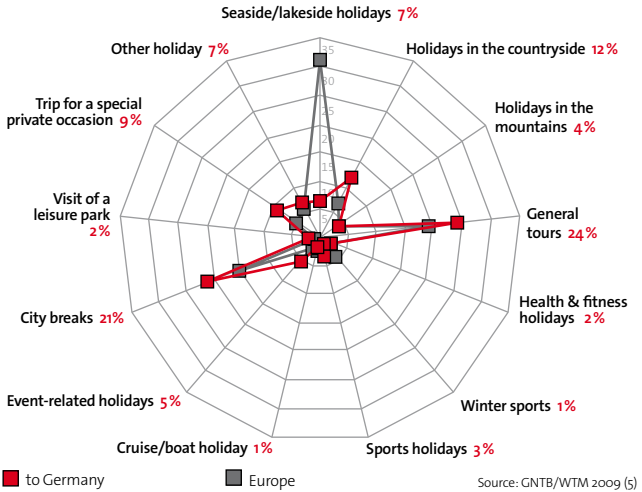
Total volume: 10.4 million trips



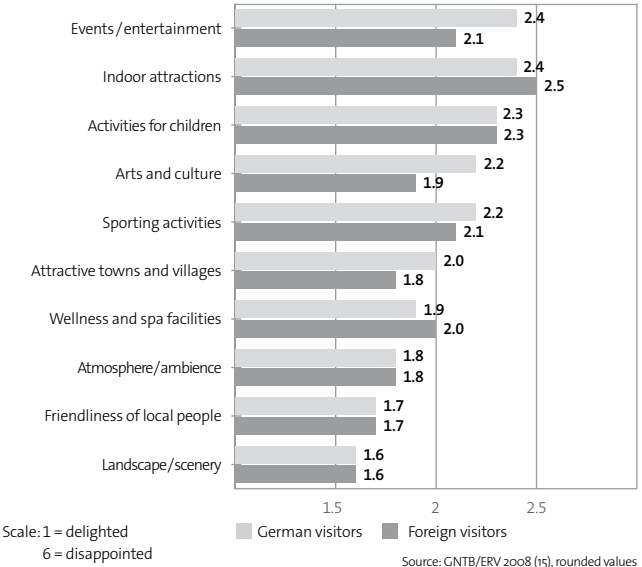
Source: GNTB/WTM 2009 (5)

Ranking of holiday contents of Europeans in Germany 2008 as a percentage

In 2008 Germany's strengths lay in city/event breaks and general tours



Satisfaction of holidaymakers in Germany with individual aspects



Source markets in Northwest/Southwest/Northeast Europe

Source markets in Northwest and Southwest Europe

With a total of 27.9 million overnight stays in 2008, 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 2008	Overnight stays Forecast 2015	Population in millions ¹
Northwest Europe	16,839,935	19,500,000	88.4
Netherlands	9,689,240	10,000,000	16.4
Great Britain	4,222,415	5,600,000	61.0
Belgium	2,473,257	3,200,000	10.5
Luxembourg	455,023	700,000	0.5
Southwest Europe	11,026,637	16,100,000	172.9
Switzerland	3,681,978	5,500,000	7.5
Italy	3,070,813	4,400,000	58.9
France	2,431,320	2,900,000	61.9
Spain	1,842,526	3,300,000	44.6
Total	27,866,572	35,600,000	261.3

¹ 2008 data

Source: Federal Statistical Office 2009 (4), GNTB 2009 (6)

Source markets in Northeast Europe/Russia

With just under 7.9 million overnight stays in 2008, 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 2008	Overnight stays Forecast 2015	Population in millions ¹
Northeast Europe/ Russia	7,903,144	9,900,000	211.4
Denmark	2,296,078	2,500,000	5.5
Sweden	1,494,198	1,900,000	9.1
Norway	652,915	700,000	4.7
Finland	509,257	700,000	5.3
Poland	1,346,876	2,000,000	38.0
Russia	1,308,499	1,500,000	141.8
Baltic States	295,321	600,000	7.0

¹ 2008 data

Source: Federal Statistical Office 2009 (4), GNTB 2009 (6)

Source markets in Southeast Europe

With a total of 4.0 million overnight stays in 2008, the source markets of Southeast Europe have about a 7% share of all overnight stays in Germany by foreign visitors

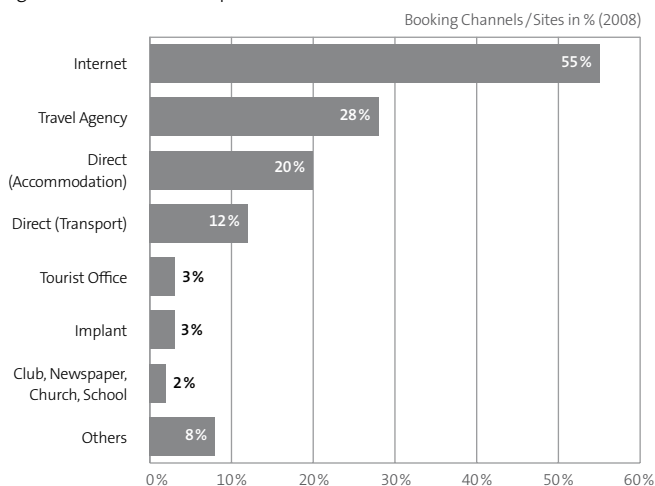
Markets	Overnight stays 2008	Overnight stays Forecast 2015	Population in millions ¹
Southeast Europe	3,982,117	4,800,000	36.0
Austria	2,482,052	3,200,000	8.4
Czech Republic	656,259	700,000	10.2
Hungary	495,179	700,000	10.0
Slovakia	193,773	200,000	5.4
Slovenia	154,854	200,000	2.0

¹ 2008 data

Source: Federal Statistical Office 2009 (4), GNTB 2009 (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 2009 (5)

Source markets in America / Israel

Source markets in America / Israel

With total 6.3 million overnight stays in 2008 the source markets in America and Israel have just under a 11 % share of all overnight stays in Germany by foreign visitors in Germany.

USA with a total of 4.4 million overnight stays in 2008 is the main overseas source market

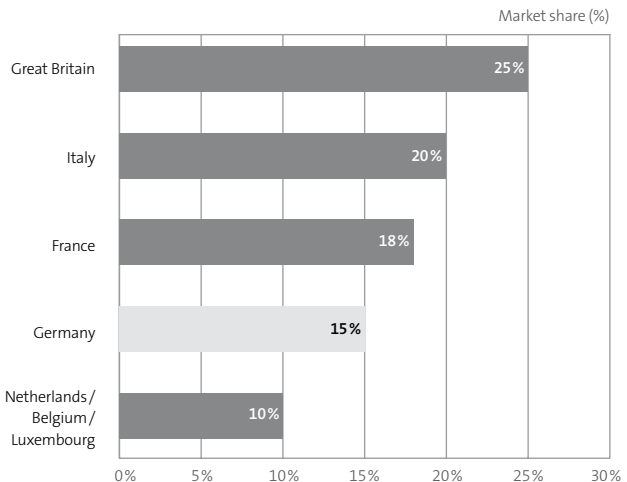
Markets	Overnight stays 2008	Overnight stays Forecast 2015	Population in millions ¹
Total	6,263,323	8,600,000	922.7
USA	4,445,440	6,100,000	308.8
Canada	556,503	700,000	33.2
Central-/South America	878,941	1,300,000	573.7
America	5,880,884	8,100,000	915.7
Israel	382,439	500,000	7.0

¹ 2008 data

Source: Federal Statistical Office 2009 (4), GNTB 2009 (6)

Main travel destinations for US Americans in Europe

Total travel from the USA to Europe: 12.3 million trips

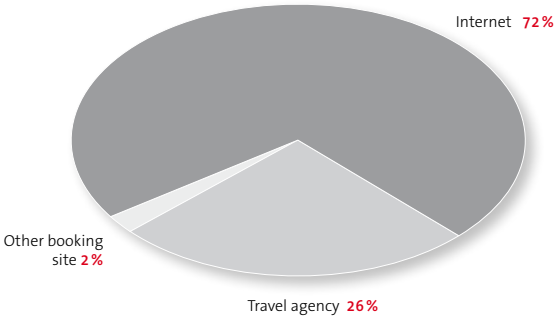


Multiple selection of destinations possible

Source: GNTB/WTM 2008 (5)

Almost three quarters of US travellers would book a future trip to Germany through the internet

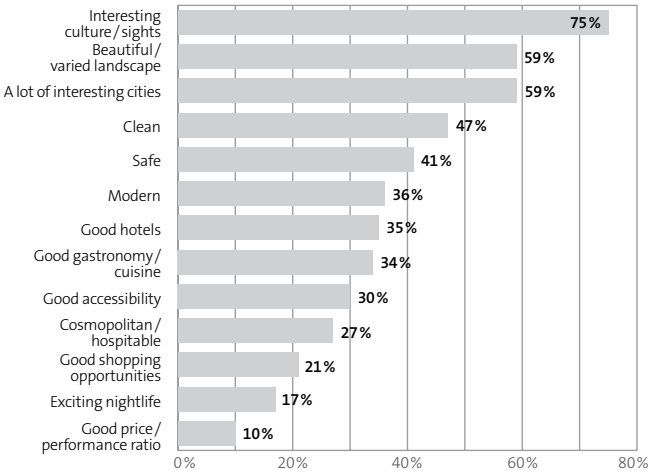
Booking method
(US citizens who have travelled abroad and are interested in Germany)



Source: GNTB/WTM 2009 (5)

The dominant aspect of the image US citizens have of Germany is „fascinating culture/attractions“

Image aspects of Germany (US citizens who travel abroad)

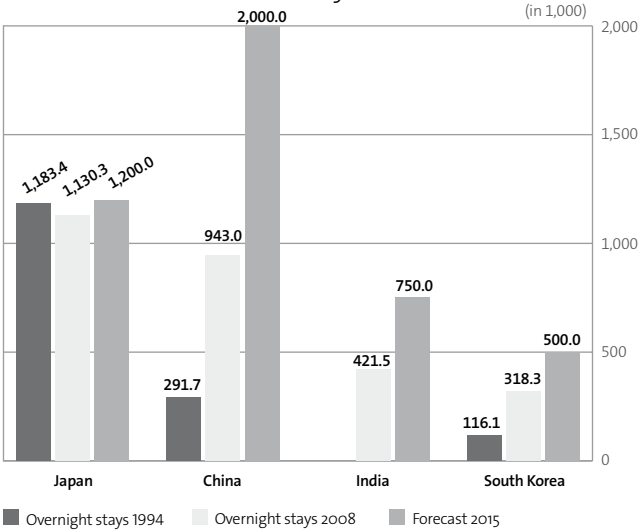


Multiple selection of categories is possible, share %

Source: GNTB/WTM 2009 (5)

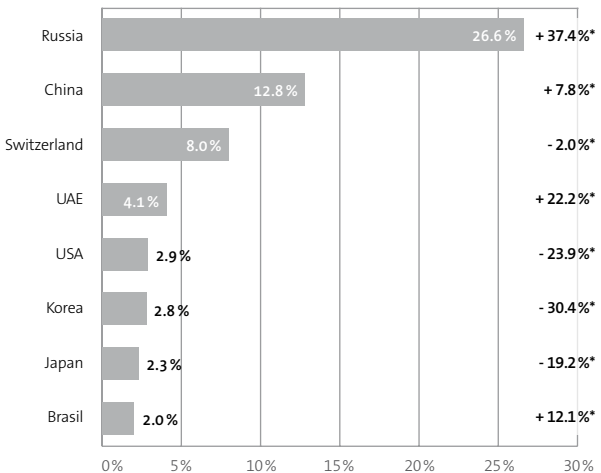
Asian source markets

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



Source: Federal Statistical Office 2009 (4), GNTB 2009 (6)

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



* Change 2008/07

Source: Global Refund 2009 (13)

Source markets Asia, Africa and Australia

With total 6.0 million overnight stays in 2008 the source markets Asia, Africa and Australia have a share of about 11% of all overnight stays in Germany by foreign visitors

	Overnight stays 2008*	Overnight stays Forecast 2015*	Population ¹ in millions*
Total	6,039,837	7,700,000	5,018.2
Japan	1,130,328	1,200,000	127.9
China/Hongkong	942,988	2,000,000	1,343.6
India	421,514	750,000	1,186.2
Arabian Gulf States	776,550	1,600,000	33.5
Asia	4,979,828	6,700,000	3,998.7
Africa	463,399	400,000	985.7
Australia, New Zealand and Oceania	596,610	600,000	33.8

* excl. Israel ¹ data 2008

Source: Federal Statistical Office 2009 (4), DZT 2009 (6)

Travel & Tourism Competitiveness Index 2009

Since 2007, Germany has consistently achieved third place worldwide after Switzerland and Austria

Country	2009	Score	2008
	Rank (133 Countries)		Rank (130 Countries)
Switzerland	1	5.68	1
Austria	2	5.46	2
Germany	3	5.41	3
France	4	5.34	10
Canada	5	5.32	9
Spain	6	5.29	5
Sweden	7	5.28	8
United States	8	5.28	7
Australia	9	5.24	4
Singapore	10	5.24	16
United Kingdom	11	5.22	6
Hong Kong SAR	12	5.18	14
Netherlands	13	5.09	18
Denmark	14	5.08	13
Finland	15	5.07	12

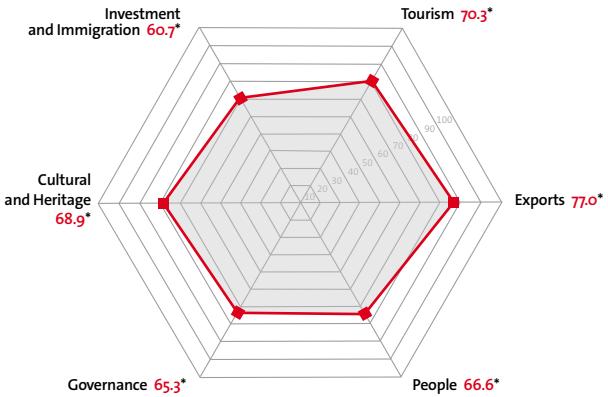
Source: World Economic Forum 2009 (3)

Germany in the world / GNTB growth outlook

Germany in the world

On the demand side, Germany is the top location out of 20 countries – enduring success since the 2006 World Cup

Tourism is one of six key locational factors for a country's image.

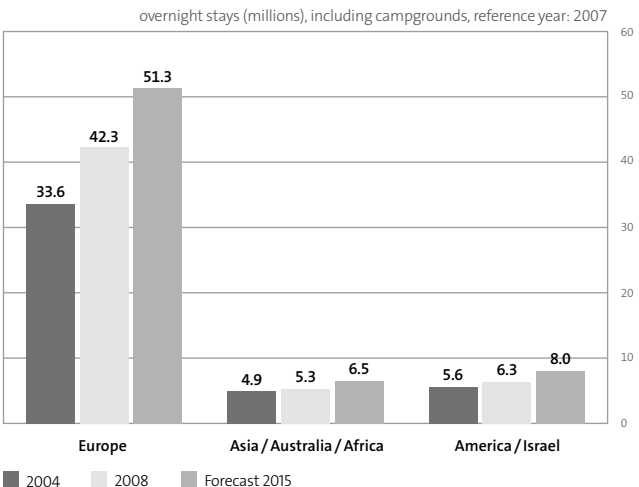


* from a max. 100 of points

Source: DZT / Anholt-GfK Roper 2008 (7)

GNTB growth forecasts for 2015

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



excl. 3.0 million other overnight stays

Source: Federal Statistical Office 2009 (4), GNTB 2009 (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

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