

Supported by:



Federal Ministry
for Economic Affairs
and Energy

on the basis of a decision
by the German Bundestag

Germany
The travel destination



www.germany.travel

GNTB annual report

2015

A strong brand
Destination Germany



The Baakenhafen Bridge in HafenCity, Hamburg

Foreword	4
A message from Iris Gleicke	6
A message from Klaus Laepple	8
Interview with Petra Hedorfer	10
1 The German National Tourist Board	12
<i>Roundtable: politicians</i>	18
2 Facts – figures – information – forecast for 2030	22
<i>Roundtable: transport</i>	34
3 GNTB members, sponsors and partners	38
<i>Roundtable: the hotel industry</i>	46
4 Sales and marketing strategy	50
5 Theme-based marketing	64
<i>Roundtable: regional marketing organisations</i>	84
6 International marketing	90
<i>Roundtable: tourism partners</i>	118
7 Administration	122
Organisation and structure	128
Production credits	135

DEAR FRIENDS, COLLEAGUES AND PARTNERS OF TOURISM IN GERMANY,

Germany is a **leading destination** in the international travel market – top positions in several global rankings underline this clearly. We are number one for **cultural** and **city breaks** with European travellers, the most popular destination for young Europeans, a leading global trade fair venue, Europe's top international **destination for conferences and conventions** and a destination for international **luxury travel**.

The outstanding results for 2015 confirm our leading position. Tourism is growing worldwide, and inbound tourism to Germany is increasing faster than the market as a whole. With almost 80 million international overnight stays, an increase of 5.4 per cent compared with 2014, we have achieved our sixth consecutive record result. And for the past six years, inbound tourism to Germany has grown at a higher rate than the European and global averages.

This report presents the results of our successful year in detail. The key finding is that Germany has cemented its position as the second most popular destination for European travellers – behind Spain, and clearly ahead of France.

We are seeing growth from all continents, but Europe remains the biggest source region for tourism in Germany by some margin. The highest rates of growth are being generated by markets in Asia-Pacific.

Demand for holidays, in particular longer holidays, is growing faster than other segments and gaining a bigger share of the inbound tourism market. Germany's major cities are especially popular: urban centres with populations over 100,000 attract 56 per cent of overnight stays by visitors from abroad.

Over the following pages we will be taking a closer look at our excellent results for 2015 as well as providing an insight into the strategy and content of our global marketing for Destination Germany.

Digital media play a key role in our strategy. They give us greater flexibility and enable us to promote a range of themes and target particular demographics. Our online activities and social media campaigns are helping us to reach increasing numbers of travellers in an incredibly cost-effective way and to create a buzz around Destination Germany.

Our marketing activities are centred on Destination Germany's core brand and the components of culture and nature. As well as promoting our basic themes to specific markets and target groups, we once again ran a major theme-based campaign in 2015 and focused on other special-interest topics in order to highlight new and less familiar facets of Destination Germany.

The core of our theme-based campaign in 2015 was the concept of how Traditions and Customs shape Destination Germany's international image and how this sets Germany apart from its competitors. The three pillars of Culinary Germany, Living Traditions and Arts & Crafts linked the modern and positive image of Destination Germany with the country's vibrant, authentic traditions and the part they play in contemporary society. We selected each topic in close cooperation with the regional marketing organisations. Instagram tours and trips for opinion-formers played a key part in the delivery of the campaign.

We made a conscious decision to make this campaign a focal point alongside the traditionally strong City Breaks/Events segment in order to promote the



development of tourism in rural areas and to position Germany as a destination for sustainable travel.

Sustainability and accessibility are key issues for the future and are being worked on across our range of products by our innovations management team. Over the course of 2015 we provided further impetus on these issues both on and offline.

The GNTB's global activities are supported by an established network of 30 offices abroad. In 2015, we converted our sales and marketing agency in Beijing into a foreign representative office to meet the needs of the fast-growing market for tourism from China. By consolidating our presence we are showing our Chinese trade partners and the country's travellers the same appreciation and respect that they enjoy as guests in our country.

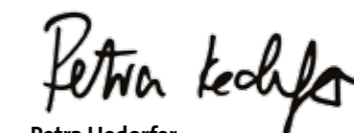
Last year, the GNTB was able to deliver its ongoing global marketing projects and set the course for the future with the reliable support of the Federal Ministry for Economic Affairs and Energy (BMWi) as a provider of grants. The Executive Board of the GNTB would like to thank the policymakers at the BMWi, and in particular Iris Gleicke, the BMWi's Parliamentary State Secretary and the Federal Government Commissioner for Tourism.

We would also like to thank the members of the Tourism Committee of the German Bundestag and the tourism policy spokespersons of the parties for the constructive support they provided throughout the year.

Our colleagues at the GNTB, both at head office and in the foreign representative offices and sales and marketing agencies, have promoted and delivered our activities with dedication, determination and hard work. The excellent results are also your success. We would like to thank you for the part that you have played in this achievement.

Our members and sponsors have supported our work with both financial and non-financial contributions. We would also like to express our gratitude to them.

Our special thanks go to our governing bodies for their unfailing commitment and support, above all the Board of Directors and its President Klaus Laepple and Vice President Ilse Aigner, Bavarian State Minister of Economic Affairs and Media, Energy and Technology, Ernst Fischer, President of the German Hotel and Restaurant Association (DEHOGA), and Peter Siemering, Vice President of the German Tourism Association.



Petra Hedorfer
Chief Executive Officer



Reinhard Werner
Commercial Director



IRIS GLEICKE, Member of the German Parliament

Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy, Federal Government Commissioner for the New Federal States and Federal Government Commissioner for SMEs and Tourism

DEAR READERS,

International tourism reached record heights in 2015, with the number of global arrivals jumping a further 4.4 per cent to 1.2 billion. Because tourism is closely linked to various areas of the economy and society, this long-term upward trend has wide-ranging and positive effects: tourism strengthens the economic value creation process, meaning new jobs are created and infrastructure is improved. But intangible effects are no less important. The dialogue that is driven by tourism helps people from different countries to better understand each other and to co-exist peacefully; it promotes tolerance, knowledge and understanding of other cultures. This applies as much to industrial nations as it does to emerging markets, and to traditional holiday destinations as much as to regions that are underdeveloped from a tourism perspective.

Germany is a safe and attractive country in every respect. According to the professional services company Ernst & Young we are ranked as the top European investment location, and people escaping conflict, persecution or poverty come to us in search of a better

future for themselves and their families. But we are also very much in demand when it comes to holidays. In 2015 Germany was able to successfully defend, and even extend, its position as the second most popular destination for European holidaymakers, trailing only Spain in the rankings.

This is reflected in the key economic data. In 2015 Germany registered around 436 million overnight stays – a record result for the sixth year running. Inbound tourism in particular continued the excellent upward trend of recent years. Almost 80 million overnight stays by visitors from abroad represent an increase of 5.4 per cent compared with the previous year. This increase in the number of overnight stays is the most important indicator for the overall development of the tourism industry. Tourism as an economic factor has a considerable, yet still underestimated, share of 4.4 per cent of the value creation process in Germany and accounts for 7 per cent of the country's workforce.

The tourism economy, of which the hospitality and tourism industries are key elements, is characterised

by SMEs. The connection between qualified and well-paid staff, high quality of service and commercial success is not only important in the restaurant and hotel business, but also applies to the transport, retail and service sectors that are closely linked to the tourism sector. Their overall value to the economy amounts to around €100 billion and they employ some 2.9 million people – and the trend is upwards.

With its global marketing activities for Destination Germany, the German National Tourist Board (GNTB) plays a considerable part in this positive development. The funds that the Federal Ministry for Economic Affairs and Energy (BMWi) provides for the GNTB's work are very well invested.

In a tourism context, however, we should be worried about the increase in right-wing extremism. In the face of xenophobic protests and arson attacks on refugee centres, it is particularly important to convey the message that the vast majority of our society is open-minded, cosmopolitan and tolerant. Our open, welcoming attitude has garnered us recognition and respect and made an important contribution to an image of Germany that is very positive overall. It is up to us to maintain and promote this image, and not just in the traditional source markets of our tourism industry. The GNTB is also tasked with developing new emerging markets for Destination Germany. The opening of a GNTB foreign representative office for the Chinese market in 2015 gave a clear signal that we are offering a warm welcome to visitors from China, who

are now increasingly coming to Germany for tourism instead of just for business.

Major themes that the BMWi has identified as important to the development of our economy are reflected in the GNTB's international marketing activities for Destination Germany. This includes rural areas that have been dramatically affected by demographic change. The targeted development of tourism in these regions can play a big part in maintaining infrastructure and bringing economic prosperity. I am delighted, therefore, that the GNTB has taken up our initiative for cultural tourism in rural areas and integrated it into its theme-based marketing. A further key issue that is very close to my heart is barrier-free tourism. The GNTB is also making a major contribution to this important area, which will become increasingly relevant in the future, and is thereby helping us to realise our objective of providing tourism for all.

On behalf of Federal Minister Sigmar Gabriel and myself I would like to thank the GNTB and its employees and wish them continued success with their important work.



Iris Gleicke

KLAUS LAEPPLER

President of the Board of Directors of the German National Tourist Board

DEAR FRIENDS, COLLEAGUES AND PARTNERS, DEAR READERS,

Once again the GNTB can report annual results that have exceeded all expectations. The number of overnight stays made in Germany by visitors from abroad increased 5.4 per cent year on year to reach nearly 80 million in 2015 – the sixth successive record result in absolute terms. But that’s not all: inbound tourism to our country is growing at a faster rate than the wider European and global tourism markets.

The volume of inbound tourism has again outstripped all predictions, exceeding both the GNTB’s own forecasts and those of international organisations at European and global level. This means that Germany was able to further strengthen its position as a leading travel destination.

As President of the GNTB’s Board of Directors it gives me great satisfaction to see how much of an impact our organisation’s ongoing work is having around the globe. The long-term upward trend that is currently being enjoyed by the German travel industry should not be taken for granted, however. Travel volumes are also subject to the kind of cyclical fluctuations that affect other sectors and are often amplified by external influences.

After all, if people are going to make travel plans in the first place, then the political and economic situation in their country has to be right. The slowdown in

global economic growth, the dramatic fall in the price of crude oil, currency decline in important emerging markets such as Russia, China and Brazil, recessions and political upheaval all serve to dampen people’s appetite for travel.

Considering these factors I believe it is realistic and sensible for the GNTB to forecast slower growth in 2016.

The long-term forecasts produced by the GNTB on the basis of numerous sources point to further growth potential of more than 120 million overnight stays by the end of the coming decade – a real opportunity for our economy. But they also present the challenge of creating the necessary infrastructure in the medium- and long-term, while bearing in mind the increasingly important aspects of sustainability, accessibility and demographic change.

It is on these key future issues in particular that the GNTB and its innovations management team is setting the benchmark for successful tourism marketing, both at home and abroad.

In our traditional source markets we are using theme-based marketing to highlight Germany’s strengths and are constantly promoting new facets of our country to potential customers. The stable upward trends in the top ten source markets are testament to the success of these efforts. At the same time the GNTB analyses potential future growth markets and



Klaus Laeppler, President of the GNTB Board of Directors



Ilse Aigner, Vice President of the Board of Directors of the GNTB
Bavarian State Minister of Economic Affairs and Media, Energy and Technology



Ernst Fischer, Vice President of the Board of Directors of the GNTB
President of the German Hotel and Restaurant Association (DEHOGA)



Peter Siemerling, Vice President of the Board of Directors of the GNTB
Vice President of the German Tourism Association (DTV)

develops them with targeted marketing. A prime example is China, where we opened a foreign representative office in 2015.

The GNTB has proven itself a reliable and creative partner for its members and partners in Germany thanks to its professional use of the marketing mix, which has created a strong presence for tourism providers in the international markets.

I would especially like to point out how the GNTB’s marketing strategy for Destination Germany has become more focused on the consumer by incorporating online activities and social media campaigns. The GNTB, as a key player in its industry, is passing on its newly acquired expertise and developing it in collaboration with the federal states and regions.

Record inbound figures for the sixth year in a row, a pioneering role in the use of the internet and social media,

and the increasing popularity of Destination Germany in more and more countries: this is an impressive achievement and I would like to personally congratulate Petra Hedorfer and her entire team.

I would also like to mention the constructive discussions with policymakers at the Federal Ministry for Economic Affairs and Energy (BMWi) and with members of parliament represented on the Tourism Committee of the German Bundestag. Thank you to everyone for collaborating so productively, and thank you in particular to Iris Glicke, the Parliamentary State Secretary of the BMWi, Federal Government Commissioner for SMEs and Tourism and Federal Government Commissioner for the New Federal States.

Klaus Laeppler



PETRA HEDORFER

An interview with the Chief Executive Officer of the GNTB

Ms Hedorfer, for 2015 you're able to present record numbers for inbound tourism for the sixth year in a row. For the current year you've forecast lower growth. What are the reasons for this cautious assessment?

For a number of years now we've grown at a faster rate than the European and global averages. That's reason enough to retain a sense of proportion and to assess expectations realistically. There's still considerable growth potential for inbound tourism to Germany. This is what we investigated and illustrated in detail last year in our long-term forecast of over 121 million overnight stays by 2030. But in order to reach this target, we have to develop both supply and demand accordingly.

Where do you see the challenges in respect of demand?

World economic growth slowed considerably last year. This particularly affected countries that have seen dynamic growth over recent years and are also likely to be growth drivers in the future. One of these

countries is Russia, which had briefly appeared on the list of Germany's top ten source markets. China devalued the yuan and Brazil is stuck in a recession. But political turmoil, terror attacks and the refugee crisis have also dampened demand. That is why we believe a phase of slower growth in current demand is the most realistic scenario. One positive I would point out here is that we are not reliant on a few large source markets; instead demand is distributed across numerous countries. Furthermore, the markets that have traditionally been the strongest – specifically those in Germany's inbound top ten – are stable and continually growing.

How will you stimulate demand?

We've set ourselves three guiding principles: firstly, the alignment of content through theme-based marketing; secondly, the use of cutting-edge marketing tools to communicate these themes; and thirdly, the targeted development of new markets.

Our content covers themes that emphasise the core brand values of Destination Germany and improve how they are positioned. Our basic themes are still part of this, of course, and we will continue to adapt them to specific markets and target groups. But it is with our theme-based campaigns that we are showcasing the many facets of the Destination Germany brand and continually re-energising our product.

With the nature theme, for example?

That's correct. Germany is well-established as a destination for cultural holidays. But many potential visitors to Germany are probably unaware that a third of its natural landscapes enjoy protected status. This is what we are highlighting in our campaign. Our national parks, biosphere reserves and nature parks offer visitors to Germany unforgettable experiences. They are also a key element in developing tourism in rural areas and in raising our profile as a sustainable holiday destination.

So, sustainability as a specific characteristic of nature holidays in Germany?

Sustainability goes beyond a single theme or a single country. Across our product range, we see sustainability as the future of tourism as a whole. Growth will only represent a gain for the destinations if it is managed in a socially acceptable and environmentally responsible way. Our beautiful natural landscapes and cultural treasures need to be carefully managed so that we can make them available to a large number of visitors without causing damage. In the long-term this will increase the appeal of the destination in question.

The same is true of accessibility. 'Tourism for all' means more than just wheelchair accessibility and waymarkers for the blind. Accessibility means more convenience for all – including older travellers and families with small children. And convenience is a sign of quality for any form of travel.

We gain experience of these key future issues through our system of innovation management, integrate these experiences into our marketing, and make this expertise available to our tourism partners. And as an enterprise the GNTB is leading by example, e.g. with Green Globe certification.

On to the second topic, the marketing mix. Which trends do you foresee and where are you looking to focus?

Digitisation is here to stay and represents the core trend in the further development of our marketing mix. It underpins the entire value chain – beginning with the multi-layered information provided to attract potential visitors, moving on to specific bookable products, and continuing with guidance provided during the trip. It then comes full circle with travellers to Germany sharing their experiences online and so attracting new prospective customers.

With our broad range of online resources we are already ahead of the curve – especially in comparison with our competitors. The next step was the development of social media marketing, which places great importance on user-generated content. Here we are regularly testing new formats, such as trips for opinion formers, and are increasingly focusing on video content.

Online and social media have opened up new perspectives for the GNTB – moving from a B2B platform to consumer-focused marketing.

And finally, the third component – new markets. Where are you looking to gain a foothold?

According to our 2030 forecast the biggest potential lies in South East Asia and South America. Which is why we converted our sales and marketing agency in Beijing into a foreign representative office in 2015. We've also identified markets in which we are looking to begin market development activities. Our foreign representative office in New York will be managing these activities in Mexico. From next year, a sales and marketing agency in Singapore is to focus on Singapore, Malaysia, Thailand and Indonesia, and in Buenos Aires the activities for Argentina and Chile are under way.

All these activities are, of course, only possible thanks to the constructive partnership with, and support of, the Federal Ministry for Economic Affairs and Energy, which provides the required budgets. Our partners from the travel industry, such as the worldwide network of German chambers of commerce, are also providing invaluable assistance with our efforts to target new markets. Together we are making Destination Germany stronger.



Pristine. Rose island near Feldafing, Bavaria

THE GERMAN NATIONAL TOURIST BOARD

Destination Germany offers its guests from around the world a wide range of tourism attractions, be it fascinating cities, historically important World Heritage sites or captivating natural landscapes that are comprehensively protected and preserved. Targeted marketing is arousing a passion for new discoveries and encouraging more and more people to experience Destination Germany every year.



THE GOAL: PROMOTING DESTINATION GERMANY AROUND THE WORLD

The **German National Tourist Board** (GNTB) promotes Germany around the world as a travel destination. Funding for the GNTB as an institution is provided by the Federal Ministry for Economic Affairs and Energy (BMWi) in accordance with a resolution passed by the German parliament. **Image building** and the development of products and **strategies**, as well as **sales, market research, advertising** and **PR activities** are the core elements of the GNTB's remit.

SUCCESSFUL MARKETING ABROAD BOOSTS THE ECONOMY AT HOME

In accordance with its charter, the GNTB runs campaigns and activities that aim to enhance the positive image of German towns, cities and regions abroad and promote travel to Germany. The yardstick for its success is the volume of overnight stays made by visitors from other countries. In 2015 this number approached 80 million for the first time. It was also the sixth consecutive record year for inbound tourism to Germany.

This success abroad pays dividends at home. The GNTB actively helps to secure and create jobs in the travel industry, which is dominated by small and medium-sized companies. A study on tourism as an economic factor financed by the BMWi and published by the German Institute for Economic Research (DIW) in conjunction with the Federal Association of the German Tourism Industry (BTW) bears out this positive impact on employment: 7 per cent of workers in Germany – some 2.9 million people – are employed directly in the tourism sector. Of these, 1,714,000 are employed in the hotel and restaurant industry, 256,000 provide services in sports, recreation, leisure and entertainment, 159,000 work in road transport, 103,000 in healthcare and physiotherapy clinics, 47,000 in travel agencies and for tour operators, and 42,000 in air travel and at airports (based on a study from 2012).

The GNTB aims to enhance the capacities and competitiveness of the tourism industry – which predominantly

consists of small and medium-sized enterprises – to secure jobs in the sector and to boost the economies of less well-developed rural regions through the promotion of tourism.

Efficient support for SMEs

Because the GNTB is spending public funds, it has an obligation to use the resources provided to it economically and efficiently and to minimise administrative costs. The total budget made available to the GNTB in 2015 came to €38.8 million. This comprised government grants of €30.6 million, contributions from members and funds generated by commercial activities. A total of €24.5 million of the overall budget was spent on marketing activities.

THE GNTB POOLS THE RESOURCES OF THE TOURISM INDUSTRY

The GNTB, as a service provider, is on hand to assist tourism providers in Germany in the development of products. It is the key contact for all partners in the German travel industry as a coordinator of joint international promotions. This arrangement gives the participants a global presence in important markets. Expertise and budgets can be strategically combined to deliver better results.

The global marketing of Destination Germany is underpinned by the cooperation between the GNTB and its 73 members and 14 sponsors, which include companies

in the tourism industry, associations and all the marketing organisations of the federal states.

The GNTB coordinates its international activities through six regional management teams: North West Europe, South West Europe, North East Europe, South East Europe, Americas/Israel and Asia/Australasia. There are 30 permanent foreign representative offices operating within these territories, of which twelve are the GNTB's own offices and 18 are sales agencies run in collaboration with local partners.

STRATEGIC, PROFESSIONAL MARKETING FOR DESTINATION GERMANY

Professional, strategic planning provides the foundation for a broad-based strategy in the international marketing of Germany. The pooling of different sales and marketing activities enables Germany's tourism potential to be efficiently communicated. Rigorous analysis of the source markets provides the basis for this.

GNTB BRAND STRATEGY

- authoritative market research and market analysis
- intensive press and PR activities abroad
- www.germany.travel website with links to partner organisations
- social media activities to promote business to consumer dialogue
- advertising in international media to secure partners for tourism service providers
- providing advice to service providers and tourism organisations on market-specific product development and business development
- ongoing development and production of new theme-related advertising material
- collaborations with the media abroad
- support for and marketing of packages for specific target groups and regions
- positioning sustainability as a facet of the core Destination Germany brand
- developing and promoting quality-assured accessible products and services

The GNTB markets Germany as a destination for both holiday tourism and business travel. Destination Germany is globally positioned as an attractive brand.

Global sales activities at a glance

The German National Tourist Board uses numerous sales channels to target international influencers and key market players:

- It promotes Destination Germany at selected international tourism trade fairs and at regional exhibitions (trade and public).
- It canvasses the international travel trade at workshops and roadshows.
- It organises the GTM Germany Travel Mart™, the biggest sales event for Germany's inbound tourism industry.
- It organises the Central Europe Workshop, an important marketing platform for markets in central and south-east Europe.
- It recruits international tour operators to act as sales partners.
- It runs Destination Germany fact-finding tours for international travel professionals and media representatives.
- It offers the Sales Guide Germany at www.germany.travel as a central sales tool for the travel industry.

The foreign representative offices and sales and marketing agencies target end customers directly and in 30 languages through the GNTB website www.germany.travel.

IN 2016 THE GNTB WILL CONTINUE TO PURSUE THE MEDIUM AND LONG-TERM OBJECTIVES THAT ARE DEFINED IN ITS CHARTER

The tourism policy of the federal government creates the **environment** in which Germany's tourism industry can flourish. The **tourism marketing** carried out around the world by the German National Tourist Board is a central element of this.

GENERAL OBJECTIVES

Funding for the GNTB as an institution is provided by the Federal Ministry for Economic Affairs and Energy (BMWi) on the instructions of the German parliament. The GNTB's tasks, which take the form of specific targets, are defined on an annual basis and in close consultation with the BMWi.

The GNTB's specific objectives are to enhance Germany's positive image as a travel destination and to promote international tourism to the country. It also aims to increase the volume of overnight stays by visitors from abroad, and the revenues from inbound tourism.

The mid-term and long-term objectives of the GNTB are, in accordance with its charter:

- 1 to cultivate the image of Destination Germany and conduct market research
- 2 to devise strategies and carry out press and PR work in the form of advertising campaigns and theme-related projects
- 3 to market Germany as a travel destination
- 4 to coordinate the marketing activities of tourism providers

CULTIVATING THE IMAGE OF DESTINATION GERMANY ABROAD / MARKET RESEARCH

In 2016 the GNTB is conducting market research activities in order to analyse the current positioning of Destination Germany in the international tourism market. This includes statistical analyses as well as various sources that gauge the image of Germany around the world. The conclusions drawn from the results form the basis of the marketing strategy in accordance with the product lines Towns & Cities / Culture and Nature / Health.

DEVISING STRATEGIES AND CARRYING OUT PRESS AND PR WORK IN THE FORM OF ADVERTISING CAMPAIGNS AND THEME-RELATED PROJECTS

In 2016 the GNTB's campaign 'Holidays in the heart of nature in Germany' is promoting Germany's 130-plus protected natural landscapes, while at the same time highlighting both its position as a sustainable travel destination and the appeal of holidays in rural areas.

MARKETING GERMANY AS A TRAVEL DESTINATION

At the heart of the GNTB's marketing of Destination Germany, in addition to social media activities specific to individual markets and themes, is the multimedia content available in 30 languages at www.germany.travel.

In 2016 the GNTB is promoting Germany at eight leading trade and consumer fairs around the world and hosting more than 20 of its own workshops and roadshows. As part of its remit the GNTB coordinates German tourism providers at these events. In Germany itself, the GTM Germany Travel Mart™ is a combination of workshop, product presentation and networking opportunity for the international travel trade.

COORDINATING THE MARKETING ACTIVITIES OF TOURISM PROVIDERS

As a central element of its strategy in 2016, the GNTB is continuing to focus on cooperations with partners in Germany and key brands that represent Destination Germany, such as the GCB German Convention Bureau, Magic Cities Germany, the German UNESCO World Heritage Sites Association and Deutsches Küstenland.

The GNTB works together with the Pacific Asia Travel Association (PATA) to develop high-potential markets in Asia. It is also expanding the scope of ongoing cooperations with strategic partners such as Lufthansa and Deutsche Bahn.

At European level, the European Travel Commission (ETC) will continue to market Europe overseas and maintain the increased focus on the BRIC countries.



The GNTB's parliamentary breakfast at the 2016 ITB travel fair with representatives from the Federal Ministry for Economic Affairs and Energy and the Tourism Committee of the German Bundestag



Marie-Elisabeth Lüders building in the government quarter, Berlin

Roundtable: members of the German Bundestag's Tourism Committee

The **Tourism Committee** raises public awareness for the **economic significance** of tourism through its initiatives, queries and hearings. Representing a **cross-section of parties**, it deals with a wide range of **tourism policy issues**, which include the environment and nature conservation, transport and digital infrastructure, work and society, health and finance. The members of the committee support the work of the GNTB by **setting the agenda for tourism policy** and in doing so champion the cause of the German tourism industry.



Heike Brehmer, MdB (CDU/CSU)
Chair of the German Bundestag's Tourism Committee

Daniela Ludwig, MdB
Spokesperson on Tourism Policy for the CDU/CSU

Gabriele Hiller-Ohm, MdB
Spokesperson on Tourism Policy for the SPD

Kerstin Kassner, MdB
Spokesperson on Tourism Policy for DIE LINKE

Markus Tressel, MdB
Spokesperson on Tourism Policy for Bündnis 90/DIE GRÜNEN

Heike Brehmer, CDU, Chair of the German Bundestag's Tourism Committee Germany's inbound travel industry has achieved record results for the sixth year running. This success can be attributed to the appeal and diversity of our country and not least to the hard work and commitment of the many people involved in the tourism sector. I would like to express my sincere thanks to them for making this possible. To remain successful in future, we need dedicated young talent. These days, young people tend to use social media as their primary source of information. Online

platforms are therefore ideal for promoting the wide range of employment opportunities that are available in the tourism industry. The impact of digitisation has long been felt in the tourism sector. People are using apps more and more on holiday to make bookings, get local travel information and find the best restaurants. Almost half of all holidaymakers use the internet during their trip. Wi-Fi in hotel rooms and restaurants will be the norm in future. For that reason, the Federal Government is investing a significant amount of money in providing extensive broadband coverage and high-speed internet.

Daniela Ludwig, Spokesperson on Tourism Policy for the CDU/CSU

In 2015 the German travel industry achieved record results for the sixth consecutive year. We all have good reason to look ahead to 2016 with optimism. The way in which inbound tourism will develop is largely dependent on the state of the global economy. Foreign visitors will only be able to continue to afford holidays in Germany if the economic situation in their home countries is favourable. All around the world, our country enjoys an excellent reputation as a holiday destination. This is largely because Germany is seen to combine a wide variety of tourist attractions, a high standard of service and the necessary infrastructure. It is therefore not always a question of offering new innovations to maintain our appeal as a travel destina-

heavily on creating accessible travel chains, reducing skills shortages, providing digital and transport infrastructure in all regions of Germany and integrating refugees into the job market. We must also ensure that xenophobic activities do not overshadow the positive impact that tourism has on international understanding.

Kerstin Kassner, Spokesperson on Tourism Policy for DIE LINKE

At this point a year ago, we were looking at the key focus points for developing Germany's inbound tourism industry. At that time, the main issues were the provision of broadband coverage throughout Germany, the shortage of skilled labour and the lack of tourism in the rural regions.

Current challenges and opportunities for continued growth in Germany's inbound tourism industry – from the perspective of members of parliament

tion. It may be sufficient to concentrate on our existing strengths and to offer foreign visitors what they most expect from Germany: tradition, friendliness and the typical thoroughness that Germans are so often teased about by people of other nationalities!

Gabriele Hiller-Ohm, Spokesperson on Tourism Policy for the SPD

The tourism industry in Germany stands apart from international competitors thanks to its high quality standards. Excellent service, modern communication, reliability and good value for money are the main factors that have led inbound tourism in Germany to grow at such an exceptionally positive rate. And so that even more opportunities can be exploited we have ensured that the funds available for the GNTB's international marketing of Germany will remain stable over the next few years.

The challenges for future growth largely stem from the consequences of demographic change and the digitisation of society. It is the rural regions that will be hardest hit by these. Our activities will now focus more

Today we are facing different challenges. We have refugees looking for a new home and for work in Germany. People in holiday regions are concerned about whether tourists, both domestic and foreign, will continue to visit in future.

A student under my supervision did some research into this for her bachelor thesis. She looked at three destinations in Germany – the Harz mountains, the city of Magdeburg and Lutherstadt Wittenberg. Neither the Harz mountains nor Magdeburg anticipated a slump in demand. The opinion in Lutherstadt Wittenberg was that declining visitor numbers was a subject that the media had caught hold of, but was unlikely to actually happen. All three regions believed that tourism from domestic and international markets was more likely to increase given that other regions around the Mediterranean were seeing a downturn in tourist trade. This should be seen as a positive sign for Germany's tourism industry as a whole.



Highlight of the parliamentary evening: Ernst Fischer, President of the German Hotel and Restaurant Association (DEHOGA), receives the honorary prize from the German Bundestag's Tourism Committee. Dr Christian Göke, CEO of Messe Berlin, Klaus Laepple, President of the Board of Directors of the GNTB, Heike Brehmer, Member of the German Parliament and Chair of the Tourism Committee, Ernst Fischer, and Iris Gleicke, Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy and Federal Government Commissioner for SMEs, Tourism and the New Federal States.

That said, all three destinations cited right-wing populist parties as a possible factor for a decline in visitor numbers. This has been seen in Dresden, for example, where tourism has dropped by 5 per cent since the Pegida demonstrations.

If we manage to integrate refugees in Germany, give children opportunities for education, let them take part in school trips, and get adults into work then we will be creating future tourists. After all, people are always inquisitive about their environment and their new country.

Markus Tressel, Spokesperson on Tourism Policy for Bündnis 90/DIE GRÜNEN

I am delighted that Germany is becoming more and more popular as a holiday destination. The figures for inbound tourism, which have increased year on year, speak for themselves. However, a number of issues have to be addressed to ensure that we continue in the same vein in future. A decline in the number of people receiving professional vocational training, for example, is evident in many areas of the tourism sector. Additional programmes are needed to counteract these skills shortages so that the industry can continue to maintain its high standards.



Stylish. Media Harbour in Düsseldorf, North Rhine-Westphalia

INBOUND TOURISM TO GERMANY: FACTS – FIGURES – INFORMATION – FORECAST

Inbound tourism to Germany has reached a record high for the sixth consecutive year. Germany is strengthening its position in the international market, with growth rates above the European and global average, and making an important contribution to tourism, a leading driver of the global economy in the 21st century.



Inbound travel to Germany: Sixth record result in a row

79.7 million
international overnight stays
in 2015

ALMOST 80 MILLION OVERNIGHT STAYS: GERMANY'S INBOUND TOURISM GROWTH WAS STRONGER THAN EXPECTED

Between January and December 2015 the Federal Statistical Office registered a total of 436.2 million overnight stays in accommodation establishments in Germany with at least ten beds – a year-on-year increase of 3.2 per cent compared with 2014.

The number of overnight stays made by visitors from outside Germany rose more sharply, by 5.4 per cent to 79.7 million, making this the sixth successive record result. International guests accounted for 18.3 per cent of the total volume of overnight stays, which was also a record high.

Inbound tourism once again played a major part in helping to deliver growth for the German tourism industry and its tourism service providers in 2015.

The projections for inbound tourism to Germany in 2015 – which were obtained from various national and international data sources – were for growth of between 3 per cent and 4 per cent. However, thanks to an increase of 5.4 per cent, these forecasts were comfortably beaten.

GLOBAL TOURISM IS GROWING – GERMANY IS BENEFITING MORE THAN MOST

Global tourism grew by 4.4 per cent in 2015 to reach a record high of around 1.2 billion arrivals (source: UNWTO, May 2016). Despite difficult conditions, such as crises, wars, terror attacks, a fall in oil prices and economic turbulence in important emerging markets, global tourism was able to maintain its status as a leading driver of the global economy in the 21st century.

Europe consolidated its position as the most important destination for international travel with 608 million arrivals. The growth rate in Europe of 4.7 per cent

was considerably higher than in the previous year and reached near parity with the Americas (up by 5.0 per cent) and Asia-Pacific (up by 5.4 per cent). Growth in the Middle East slowed to 1.6 per cent, while Africa recorded 2.9 per cent fewer arrivals in 2015 (source: UNWTO, May 2016).

Almost 35 million arrivals were registered in Germany, up by 6 per cent on the previous year. Germany strengthened its already excellent position as a leading European travel destination in 2015 and underlined its increasing importance as a destination for international travel, a continuation of a long-term trend (sources: UNWTO, Federal Statistical Office).

Furthermore, the World Travel Monitor (WTM) compiled by market research company IPK International found that travelling has become an essential consumer need, not just in North America and Europe, but also increasingly in South America and Asia. The latest results showed that the average spend per outbound trip rose by 4 per cent worldwide to reach 1,825 US dollars. The increase in tourist traffic to more than one billion outbound trips saw global tourism revenues go up by 7 per cent.

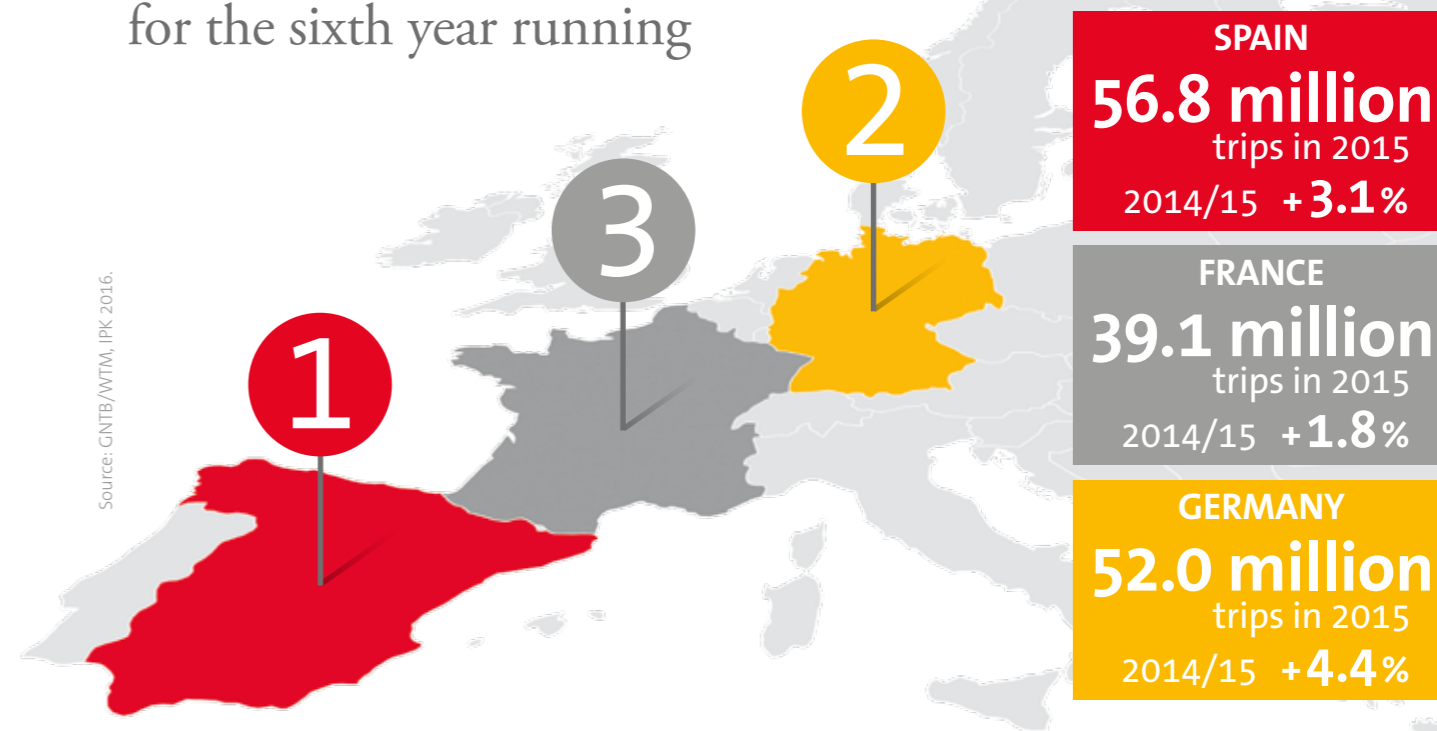
In 2015 the vast majority of international travellers once again remained within their own continent. The proportion of intracontinental trips was higher in Europe (84 per cent) than in the Americas (77 per cent) or in Asia (72 per cent).

DESTINATION GERMANY IS WELL POSITIONED IN THE EUROPEAN MARKET

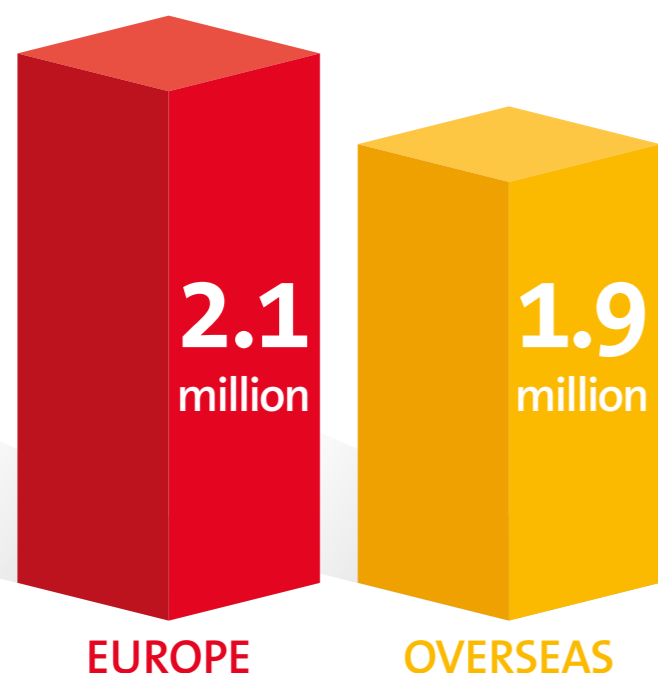
Destination Germany was once again able to extend its excellent position in the top tier of European travel destinations in 2015. The WTM revealed that 52.0 million trips were made to Germany, up by 4 per cent on the prior year.

Spain recorded 3 per cent growth and topped the rankings with 56.8 million trips. France remains in third place, having grown by 2 per cent to 39.1 million trips. Then come Italy (35 million trips) and Austria (26 million trips). In the face of strong European competition Germany has generated above-average growth both in absolute terms and proportionally.

Germany the **second most** popular **destination for Europeans** for the sixth year running



Absolute growth in 2015: 4.1 million overnight stays* by visitors from abroad



The **European and overseas markets** each accounted for **half** of the absolute growth in 2015* (rounded values)

Source: Federal Statistical Office 2016; accommodation statistics incl. camping; *incl. around 160,000 overnight stays from unspecified countries.

EUROPE IS SHAPING THE GROWTH OF GERMANY'S INBOUND TOURISM

Almost three quarters of all international overnight stays in Germany (73.4 per cent) were made by visitors from other European countries in 2015. These markets played a key role in the expansion of Germany's inbound tourism sector, generating an increase of 2.1 million overnight stays.

Nine of the top ten source markets for inbound tourism to Germany are in Europe. The Netherlands still lead the way with 11.2 million overnight stays (up by 1.6 per cent). In second place is Switzerland, with 6.4 million overnight stays (up by 8.4 per cent). High rates of growth were also recorded from the UK, which generated 7.4 per cent more overnight stays than in 2014 and remained in fourth place, just behind the USA. Behind the UK came Italy, Austria, Denmark, France and Belgium with growth of between 1.3 per cent and 5.0 per cent. The highest growth among the European markets in 2015 was achieved by Spain (up by 24.2 per cent to 2.7 million overnight stays), which moved back up into the top ten.

GREAT POTENTIAL IN OVERSEAS MARKETS

The USA, the third-biggest source market for Destination Germany, and still the biggest overseas market, continues to exhibit dynamic growth, contributing a total of 5.6 million overnight stays (up by 8.5 per cent) to Germany's inbound tourism industry in 2015.

China's total of 2.5 million overnight stays (up by 24.8 per cent) takes it very close to becoming one of the top ten markets for Germany. The Arab Gulf States are also continuing their upward trajectory, passing the two million mark for the first time with an increase of 17.7 per cent.

GERMANY IS BEATING THE MARKET IN THE BATTLE FOR EUROPEAN TRAVELLERS

Germany's excellent performance in 2015 is reflected by the increases in travel volume from a number of its source markets. The number of trips abroad made from Switzerland rose by 5 per cent overall, whereas the number of trips to Germany from this market climbed by 9 per cent. In Denmark, 4 per cent more outbound

trips were made than the previous year – the number of trips to Germany rose by 6 per cent, however. The Czechs also went on more trips abroad, with the market expanding by 7 per cent. Trips to neighbouring Germany were up by 9 per cent.

GERMANY POPULAR WITH EUROPEAN HOLIDAYMAKERS

There has been a slight shift in the weighting of the travel segments for inbound tourism: across Europe trips to visit friends and family are up by 3 per cent (a 14 per cent share of the market), while the volume of holiday trips increased by only 1 per cent (a 72 per cent share). The market for business travel is also growing (up by 3 per cent, a share of 14 per cent).

In the holiday travel segment Germany grew at an impressive rate and faster than the European market as a whole: while IPK International registered modest growth of 1 per cent across Europe in this segment, Germany grew by 4 per cent to reach 29 million holiday trips – equivalent to a market share of 55 per cent of all European travel to Germany. Within this segment, the volume of short breaks of up to three overnight stays has increased (up by 4 per cent to 12 million). Longer holiday trips of four or more overnight stays also showed growth (up by 3 per cent to 17 million).

There were ten million trips to visit friends and family and other trips, equivalent to a market share of 20 per cent (19 per cent in 2014).

PROMOTABLE BUSINESS TRIPS UNDERPIN GERMANY'S NUMBER ONE POSITION

According to IPK International and the World Travel Monitor, Europeans made 64 million outbound business trips in 2015, a 3 per cent increase on 2014. Germany registered 4 per cent more business trips and so maintained its leading position in Europe with 12.8 million trips. France, with 5.4 million trips, and the UK, with 5.0 million, follow in second and third place.

Overall, the segment comprising promotable business trips from Europe to Germany remained more or less at the previous year's level, at 6.7 million trips, representing a market share of 52 per cent.

The no. 1 business travel destination for Europeans

Within the meetings, incentives, conferences and events (MICE) sector the largest segment was congresses/conferences, meetings and seminars with a share of almost 30 per cent. The total volume of travel in this key segment increased by 10 per cent to 3.7 million trips. The next largest segment was trade fairs and exhibitions with a share of 20 per cent or 2.6 million trips. Due to the varying rhythm of trade fair and exhibition dates there was a decline in 2015 which also affected overall growth in the promotable business travel sector.

Having declined in 2014, the volume of traditional business trips from Europe to Germany grew again, by 12 per cent, to reach 6.1 million – equivalent to a market share of 48 per cent.

DESTINATIONS IN GERMANY – BERLIN REMAINS BUOYANT

In 2015 almost all federal states attracted more overnight stays by international visitors than in the previous year.

Berlin maintained its leading position as the engine for growth. Germany's capital registered 13.6 million international overnight stays in accommodation providers with ten or more beds, a 9.2 per cent increase on 2014 that continued the upward trend.

Of the non-city states, Baden-Württemberg (up by 7.6 per cent), Hessen (up by 6.3 per cent) and Bavaria (up by 6.0 per cent) enjoyed the highest growth rates. Hamburg, Saxony-Anhalt and Schleswig-Holstein grew by between 5.9 per cent and 5.5 per cent, just above the average for Germany as a whole. The most popular destination with foreign visitors remains Bavaria with 17.6 million overnight stays.

GERMANY'S CITIES A BIG HIT FOR CULTURAL TRAVEL

Germany remains the number one city-break destination for Europeans. Nearly ten million city breaks

represent, according to IPK International, an increase of 5 per cent in 2015, continuing the upward trend from the previous year. As for international overnight stays, Germany is the only country to have three cities in the European top 25: Berlin at number seven, Munich at number 14 and Frankfurt at number 23.

The Magic Cities, a marketing association of Germany's ten leading city destinations, accounted for almost 22 million international overnight stays in 2015, equivalent to a 27 per cent share of the inbound travel market.

With 13.6 million overnight stays, Berlin remained by some distance the most popular destination among the Magic Cities and overall. It was followed by Munich (7.0 million) in second place and Frankfurt (3.9 million) in third.

The marketing association Historic Highlights of Germany (HHoG) – 14 university cities that are at least 700 years old – registered a total of 3.3 million international overnight stays in its member cities in 2015. Ahead of the field were Freiburg and Heidelberg with around 550,000 overnight stays each. Most members of the HHoG saw an increase, in particular Osnabrück (up by 34 per cent) and Wiesbaden (up by 17 per cent). Growth in Freiburg, Heidelberg and Erfurt ranged from 11 per cent to 12 per cent.

These figures confirm the popularity of Germany as a destination for European travellers. According to IPK International, city breaks are the most popular form of holiday to Germany, accounting for 33 per cent of visits. By way of comparison, the average across Europe is 23 per cent. Germany also does much better than Europe as a whole for multi-destination tours (21 per cent compared to the average of 16 per cent) and event-related trips (4 per cent and 4 per cent).

INTENSIVE MARKETING FOR TOURISM IN RURAL AREAS

In 2014, in accordance with the objective set by the federal government, the GNTB stepped up its efforts to promote tourism in rural regions. Numerous theme-based marketing activities supported an overarching initiative entitled 'Beyond the cities – holidays in the German countryside'.

The GNTB's Quality Monitor survey of tourism in Germany reveals that foreign visitors to Germany's rural areas are particularly keen on health and fitness, visits to friends and families, the great outdoors and active pursuits. And their expectations are clearly being met. At 1.7, the overall satisfaction rating of all respondents was higher even than for Germany's city regions (scale: 1 delighted, 6 disappointed).

22 per cent of inbound tourism is to rural areas.

Since 2005, the number of overnight stays made by international visitors in smaller towns and villages (under 10,000 residents) has increased by 41.8 per cent, reaching more than 17.1 million in 2015. This means that rural regions now account for 22 per cent of all inbound tourism in Germany.

The biggest source markets are Germany's neighbouring countries. The Netherlands lead the way with a 31 per cent share of the market (5.4 million overnight stays), followed by Switzerland (2.2 million), Belgium, Denmark, Austria and France.

The GNTB is promoting tourism in rural regions in the relevant markets with specific offerings based on the themes of sustainability, health and fitness and activity-based holidays. This year's theme-based marketing campaigns, 'Traditions and Customs', 'Scenic routes of Germany' and 'Holidays in the heart of nature', are also encouraging people from around the world to venture beyond the city regions when they visit Germany.

INFRASTRUCTURE MEETS EXISTING DEMAND

Hotels

Germany's hotel and restaurant industry benefited from the excellent inbound tourism figures last year. With 32,971 establishments and 1.8 million beds (Federal Statistical Office, July 2015), the German hotel industry is meeting demand and offers everything from low-cost accommodation to luxury hotels.

According to the Federal Statistical Office, total revenues in the hospitality industry went up by a nominal 4.2 per cent in 2015, which included a 4.3 per cent rise for hotels, inns and guesthouses.

Thanks to its mix of accommodation Germany still offers outstanding value for money in the European market. At €102.80, the average room price was just 1 per cent above the comparable figure for the previous year, whereas net room prices across the European Union averaged €119.10, up by 3.3 per cent and 16 per cent higher than the average price in Germany. In a direct city-to-city comparison, the hotels in Germany's major cities are far more affordable than those of their European competitors.

Modes of transport

The importance of flying as a mode of transport for international travel to Germany continued on its upward trajectory: more than a third of European visitors arrived by air in 2015, an increase of 5 per cent. The figure for overseas visitors stood at 97 per cent.

According to the German Airports Association, a total of 216 million passengers (arrivals/departures) were counted at Germany's 22 international commercial airports in 2015, a year-on-year increase of 3.9 per cent. This growth was driven by international connections, which were up by 4.5 per cent for European traffic and by 4.3 per cent on intercontinental routes.

The car remains by some distance the leading mode of transport for travel to Germany, gaining 5 per cent on the prior year and accounting for a market share of 47 per cent. Coach trips increased by 7 per cent and now have almost the same modal share (9 per cent) as the train, which was chosen by 6 per cent fewer passengers.

Travel organisation and booking patterns

New media are becoming increasingly important – and that's also the case for Germany's inbound travel industry: around 82 per cent of Europeans travelling to Germany used the internet at some point in the planning of their trip, an increase of 8 per cent compared with 2014. In fact, almost two thirds went online not



Bastei rock formation in Saxon Switzerland National Park

just to do research but also to book all or part of their holiday. Visits to travel agents accounted for 14 per cent of bookings made by Europeans travelling to Germany.

Visitors to Germany from overseas were even more likely to use the web: 84 per cent used the internet to plan their trip, while 72 per cent actually booked online.

INBOUND TOURISM A BOON FOR THE ECONOMY

The tourism industry as a whole plays a key role in the German economy. DIW econ, the German Institute for Economic Research, reported that in 2012 annual consumer spending by domestic and international visitors on day trips and longer stays amounted to €278.3 billion. 41 per cent (€115.4 billion) of this was generated by people who stayed overnight, and 30 per cent of that total was attributable to travellers from abroad (€34.1 billion). DIW econ found that tourism is directly responsible for 4.4 per cent of value creation and directly employs 2.9 million people.

Inbound tourism is becoming increasingly important to the German economy and is playing a big part in improving the country's balance of payments. According to the Bundesbank, travel receipts from foreign visitors to Germany rose by 1.9 per cent to €33.2 billion. This is the sixth successive increase. In contrast, the travel expenditure of Germans abroad dropped 2.1 per cent to €68.8 billion in 2015. The ratio of revenue generated by tourists in Germany to the amount that German tourists spend abroad has changed over the last ten years from 39 per cent to 48 per cent.

According to IPK International's European Travel Monitor, Europeans spent a total of €30.3 billion on trips to Germany last year, up by 2 per cent compared with 2014. This includes all expenditure for transport, accommodation, food and shopping while staying in Germany, as well as travel to, from and within Germany. A further €20 billion was spent by visitors from overseas.

GERMANY REMAINS A POPULAR SHOPPING DESTINATION

Shopping tourism made another important contribution to the economic value creation of inbound tourism

in 2015. Revenue from tax-free shopping (purchases by visitors from non-Schengen countries) rose to nearly two billion euros, an increase of 25 per cent compared with 2014, when revenues stagnated. With the exception of Russia, all major shopping nations saw significant increases of between 23 per cent and 61 per cent compared with the previous year.

The highest spenders in Germany in 2015 were the Chinese, who now hold a 43 per cent share of the market. Despite a sharp decline in the amount of revenue that they generated, the Russians remain in second place with a market share of 11 per cent, followed by Switzerland, the United Arab Emirates, Kuwait, Taiwan, Thailand, Israel, the USA and Saudi Arabia.

Munich and Frankfurt are still the most popular destinations for international shoppers, while the most popular products are fashion/clothing and watches/jewellery.

EXCELLENT IMAGE ENHANCES GERMANY'S POPULARITY

Destination Germany's successful inbound tourism sector is based on its excellent international positioning and image. As a country, an economic power and a travel destination Germany occupies top positions in numerous rankings.

The GNTB continually analyses people's perceptions of Germany to determine how best to position it as a travel destination. It draws on various sources that measure factors on both the demand and supply side of the international tourism market. The picture is completed by the Quality Monitor survey of tourism in Germany, which gauges the views of travellers who are already in Germany.

The highly respected Anholt-GfK Roper Nation Brands Index, which measures the image of 50 countries around the world, put Germany in second place in 2015. On the demand side, Germany's reputation is now ahead of major international rivals in the overall rankings. In the tourism category, Germany held on to seventh position, putting it on a par with traditional holiday destinations such as those in the Mediterranean.

Top positions in a global comparison



The Anholt-GfK Roper Nation Brands Index (NBI) ranks 50 destinations around the world in terms of their reputation, conducting online surveys of over 20,000 consumers in more than 20 countries. People's opinions of various locational factors in the categories of culture, governance, exports, people, immigration/investment potential and tourism are collated and compared to produce the rankings. The NBI believes that tourism makes up a big part of how countries are perceived. And tourism as a locational factor is playing an increasingly important role in investment decisions.

According to the 2015 Travel and Tourism Competitiveness Report compiled by the World Economic Forum, Germany was in third place on the supply side in a comparison of 141 countries. Germany took top position in the categories health/hygiene, ground transport infrastructure, tourism infrastructure, cultural resources and security/stability.

OUTLOOK FOR 2016 – CAUTIOUS OPTIMISM

The latest UNWTO forecasts suggest that the international travel market will expand by between 3.5 per cent and 4.5 per cent this year. There are a number of factors that make it difficult to predict growth in 2016. The security situation in Europe and the world, the rapidly evolving refugee crisis and global economic conditions may all have an adverse effect on travel patterns. Taking these factors into account, the GNTB believes that a slightly slower growth rate of 1 per cent to 3 per cent is realistic for this year.

MEDIUM-TERM FORECAST – FURTHER GROWTH FROM HIGH-POTENTIAL MARKETS

Over the coming years, the GNTB expects to see further growth in inbound tourism from markets in South East

Potential for nearly **two million more overnight stays*** in Germany from **growth markets by 2030**

*excluding camping; figures are rounded (regional classification as per UNWTO) Source: GNTB/Claus Säger 2014.

One million trips to Europe from Argentina and Chile alone.

Market	Trips abroad (2014)	Trips to Europe (2014)	Trips to Germany (2014)
1st place	ARGENTINA , 7,300,000	ARGENTINA , 774,000	ARGENTINA , 68,000
2nd place	CHILE , 2,100,000	CHILE , 254,000	CHILE , 56,000
TOTAL	9,400,000	1,028,000	124,000

Source: GNTB/WTM, IPK 2015.

Already **1.4 million trips to Europe** from Indonesia, Singapore, Malaysia and Thailand.

Market	Trips abroad (2014)	Trips to Europe (2014)	Trips to Germany (2014)
1st place	INDONESIA* , 7,800,000	MALAYSIA , 518,000	THAILAND , 62,000
2nd place	SINGAPORE , 6,700,000	THAILAND , 418,000	SINGAPORE , 56,000
3rd place	MALAYSIA , 5,900,000	SINGAPORE , 405,000	MALAYSIA , 54,000
4th place	THAILAND , 3,900,000	INDONESIA* , 93,000	INDONESIA* , 50,000
TOTAL	24,300,000	1,434,000	222,000

Source: GNTB/WTM, IPK 2015; *2013 Indonesia Outbound Market Profile, GNTB estimate.

Asia and South America. It analysed possible source markets in 2015 to gauge the potential that they hold for inbound tourism.

According to IPK International, there were 774,000 trips to Europe from Argentina in 2014, 254,000 from Chile and 138,000 from Mexico. Germany is one of the most important destinations for visitors from those markets, along with Spain, Italy, France and the UK. Recent market analysis conducted by the worldwide network of German chambers of commerce on behalf of the GNTB showed that historical and cultural attractions, food and drink, and family activities are particularly relevant travel themes for Chileans and Argentinians. According to an

online survey by the GNTB, Germany is seen as authentic, trustworthy and service-oriented. 29 per cent of respondents had already been to Germany; over a quarter stated that they had definite intentions of travelling there.

Almost 800,000 overnight stays by visitors from Brazil were recorded in 2015, and there were more than half a million from the other South American countries. Based on current data, the other South American countries could generate an additional 2.4 million overnight stays by 2030 – almost five times as much as the current figure. The potential increase in overnight stays by visitors from Central America including Mexico by 2030 stands at 107 per cent.

The GNTB also commissioned analyses for the future growth markets Singapore, Malaysia and Thailand. Currently the most important European destinations for travellers from these countries are the UK, France, Germany, Switzerland and Italy. Holidays focused on health, fitness and nature top the list of choices, along with privately organised multi-destination tours.

Of those surveyed, 30 per cent had been to Germany before, while 28 per cent of participants in a GNTB online survey stated that they had definitive intentions of travelling to Germany.

The key objective when initiating market development activities is to position Destination Germany with consumers. To this end, the GNTB employs campaigns featuring online travel agents, social media activities and press work. B2B events in the markets, invitations to the Germany Travel Mart for selected decision-makers, and visa information training in relevant countries are all aimed at creating and expanding product knowledge within the local travel industry. From 2017, the GNTB plans to open sales and marketing agencies in Singapore and Buenos Aires as a further step in expanding these growth markets. There are also plans for market development activities in Mexico through the foreign representative office in New York.

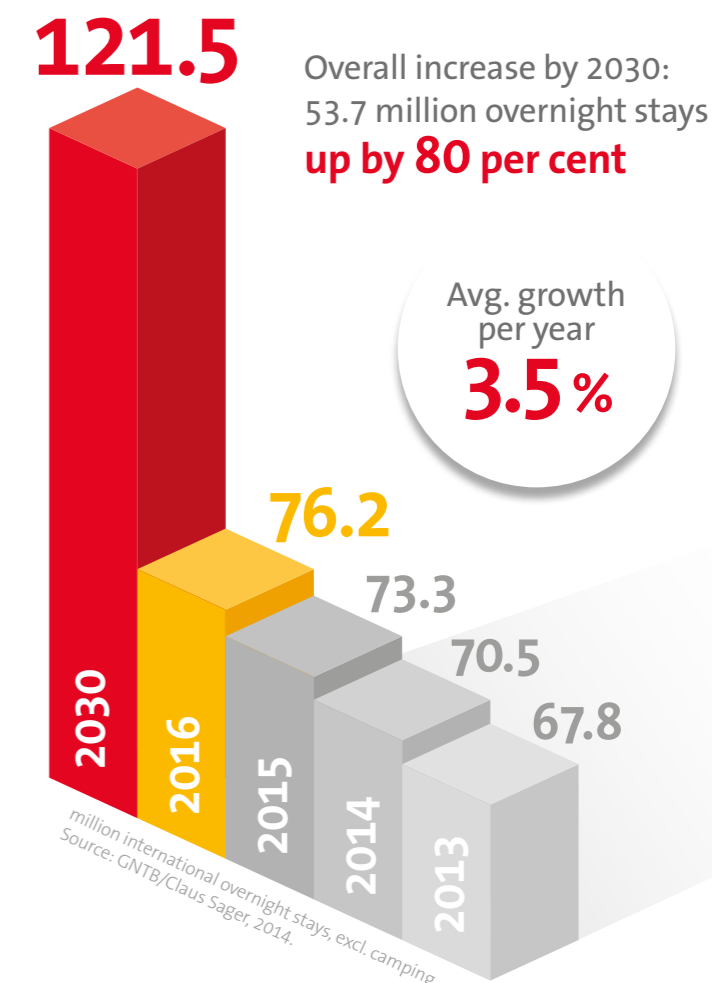
FORECAST FOR 2030 – INBOUND TRAVEL TO GERMANY ON TRACK FOR LONG-TERM GROWTH

According to the World Trade Organization, global tourism will continue to grow well into the coming decade. Its prediction is for 1.8 billion arrivals by 2030. In this scenario Europe's market share of global inbound tourism will fall by a further 10 percentage points to 41 per cent, while Asia's share as a destination market will increase significantly by 7 percentage points to 30 per cent. The Americas will attract 14 per cent of global travellers (down 2 percentage points on 2015), the Middle East will increase its share from 5 per cent to 8 per cent, and Africa's share will also increase, from 5 per cent to 7 per cent. Despite this significant shift, Europe will remain the leading source and destination market for international travel in 2030.

Assuming an average annual increase of 3.5 per cent, around 121.5 million international overnight stays by 2030 are possible for Germany's inbound tourism – an increase of 80 per cent.

Europe will remain Germany's most important source market with a 72.5 per cent share of all international overnight stays. China and Poland are likely to be well established in the top ten markets for Germany's inbound tourism.

In 2030 Germany's inbound tourism industry could potentially generate **121.5 million overnight stays.**



Excellent transport links to and within Germany

GNTB members from the **transport** sector were interviewed for this **roundtable**. Read on to see what they had to say.



Jens Bischof
Executive Vice President Sales & Chief Commercial Officer Hub Frankfurt Deutsche Lufthansa AG

Dr Stefan Schulte
Chief Executive Officer Fraport AG

Andreas von Puttkamer
Head of the Aviation Division Munich Airport



Dr Ralph Körfggen
Chief Executive Officer DB Vertrieb GmbH

Martin Gruber
Managing Director of Avis Budget in Germany, Austria, Switzerland, Poland and the Czech Republic

Raimund Jennert
Head of Tourism at the German Cyclists' Federation (ADFC)

Regine Sixt
Senior Executive Vice President Sixt International, Sixt SE

How would you and your organisation sum up **2015** in terms of **inbound tourism** compared with previous years? What **trends and challenges** do you anticipate for **2016**?

Jens Bischof, Lufthansa The Lufthansa Group further extended its position as market leader in 2015, handling over 107 million passengers. We fly European and overseas customers from more than 200 destinations to Germany. In addition to key source markets such as the USA, the UK, France and Spain, we are seeing continued growth in passenger numbers from China, South Korea and Brazil.

With our network of hubs and airlines, we can offer an integrated and seamless travel experience for passengers from all over the world. Lufthansa's entire long-haul fleet has been fitted with the latest product generation in first and business class, and the new premium economy class offers 50 per cent more elbow and leg room and its customer feedback has been outstanding.

We are still focusing on the continuous improvement of the customer experience by providing greater customisation as well as more personalised products and

services along the entire travel chain. With Lufthansa Express, our new umbrella brand for transfer services, we are offering customers from around the world the option of booking bus, train or hire car services in combination with their flight so that they can stay mobile in Germany.

And by introducing the new Airbus A350, the most advanced and eco-friendly long-haul aircraft in the world, Lufthansa's passenger fleet will continue to be a technological trendsetter in the airline industry in 2016.

Dr Stefan Schulte, Fraport Frankfurt Airport handled a record 61 million passengers in 2015. Inter-continental traffic in particular was very buoyant, with the USA continuing to be the largest international source market by far, accounting for nearly seven million travellers (up by 2.2 per cent). There were also further substantial increases in the inbound figures from China and the Arab Gulf States (up by 6.4 per cent and

8.2 per cent respectively). High-potential future markets, such as India (up by 6.1 per cent), South Korea (up by 12.5 per cent) and Iran (up by 6.6 per cent), delivered impressive growth as well.

The travel industry has rarely found itself facing such formidable challenges as it does today. The threat of terrorism, the ongoing refugee crisis, and economic weakness and political instability in a number of countries are causing people to deviate from the traditional booking patterns on which the carriers base their long-term seasonal planning. As a result, our tourism sales business has been all the more focused on giving expert advice and support to travel agencies.

Andreas von Puttkamer, Munich Airport With an increase of more than one million passengers to nearly 41 million, Munich Airport set another new record last year. The volume of international inbound travel at Munich Airport rose moderately in 2015.

We registered double-digit growth from Italy, Spain, China and the United Arab Emirates, which more than compensated for the decrease in the number of Russian travellers.

We are delighted about the opening of our satellite facility in 2016. It is one of the most modern airport terminals in the world and will offer our customers a new travel experience and more convenience than ever. In light of current media reports, the major challenge will be safeguarding Germany's positive image abroad and maintaining freedom of travel within Europe.

Dr Ralph Körfggen, Deutsche Bahn Despite the faltering economy in key growth markets such as China, we were able to deliver a positive performance overall in 2015, even though we could not match the record results of the previous years. However, the solid foundations for another successful year in inbound tourism have been shaken by the current political debates. That

said, we expect to see an end to consumer reticence, particularly among tourists, in the coming months. Improving the international saleability of tickets from European rail companies will give a further boost to the rail travel business.

Our tour operator Ameropa continues to deliver positive results. We are seeing a considerable rise in the number of foreign visitors using the website ameropa.de and the dynamic packaging of hotels with Deutsche Bahn train tickets is proving very popular, particularly among travellers from Switzerland. In 2016 we will once again substantially expand our range and the number of available fares, and offer further attractive products.

Martin Gruber, Avis Overall, Avis Budget car hire had a very positive year in 2015, with markets such as the EU and Asia continuing to deliver high growth. As part of the Avis Budget Group, with its excellent global positioning, we benefit from a strong network and are able to meet a wide range of transport needs with our two brands, Avis and Budget. We are particularly focused on the services we can offer, and we are looking to continually expand these services together with our network of hire locations. Our premium vehicles, in particular, are very popular in this regard. We are, for example, the exclusive rental car partner of Porsche in Germany and offer, in addition to the Prestige & Select Series, the option of hiring specific models or sports cars in Europe instead of only individual vehicle categories as before.

Personalised travel experiences are becoming more and more important and this trend is set to continue in 2016. This is evident from our own research as well as industry analysis. The car, as a personal mode of transport, is becoming a key part of the holiday experience as it guarantees independence at the destination. We therefore believe that hire cars will become more important, and this is a trend that we obviously welcome. Furthermore, it will surely be the case that people's own cars will become less significant, whether as status symbols or in response to a growing environmental awareness. This will affect not only younger people but urban areas as a whole. We sense an opportunity with this trend: with the appropriate products and services, we can offer our customers who don't own a car a means of individual transport. That is why we have opened a hire location at

the heart of Frankfurt city centre, and another will soon follow in Munich. We are also active in the car-sharing segment with Zipcar.

Raimund Jennert, German Cyclists' Federation (ADFC)

2015 was a good year for cycling tourism in Germany. Around 4.5 million people went on a cycling holiday in Germany, which is 11 per cent up on the previous year. This figure also includes cycling enthusiasts from other European countries and even from overseas. The Dutch, Belgians and Poles, in particular, enjoy coming to Germany to go cycling. We are, however, increasingly receiving enquiries from cycling holiday groups based in Asia, America and Israel that are interested in tours on Germany's long-distance cycle routes. Riverside routes are particularly popular, as are themed routes such as the Towns of Thuringia Cycle Route and the Berlin Wall Cycle Route. Tours offering more challenging terrain also attract a great deal of interest, such as the Via Claudia Augusta and the route linking Lake Constance and Lake Königssee.

The hotel and hospitality industry welcomes cyclists, as the increase in 'Bed & Bike' establishments clearly shows. Some 6,000 bike-friendly accommodation providers in six European countries now vie for the custom of cyclists. And Germany's neighbours are following its example.

Every effort is now being made in France, Italy and Austria to offer cycling tourists, both domestic and foreign, attractive facilities. In our view, route operators need to take a more international approach and offer multilingual websites, apps and more.

Regine Sixt, Sixt Last year we saw strong growth in our home market of Germany, with a high level of demand from both private and corporate customers. Vehicle hire through travel agencies outside Germany also rose compared with last year. Our premium products and services played a key part in achieving these results.

We anticipate high demand again this year. Private customers require highly individual solutions when travelling. That is why we offer our travel agency partners customisable products that cover a large range of wants and needs. We also offer all-inclusive prepaid

tariffs from Sixt Holiday as well as our basic, advanced and comfort packages for corporate customers who do not have a fixed-rate agreement. In addition, we are seeing increasing demand for luxury travel with exclusive solutions. We are meeting this demand with our premium fleet of Sixt luxury cars and with our Sixt limousine service.

Because private customers value end-to-end services, we provide our 'myDriver' premium transfer service in Germany and abroad through our travel agency partners. This enables extras such as airport transfers to be added to the conventional hire car agreement.



The Wadden Sea was granted World Heritage status by UNESCO in 2009. Pictured here is the Schleswig-Holstein Wadden Sea National Park.



Romantic. Chalk cliffs with the Königsstuhl (King's Chair),
Mecklenburg-Western Pomerania

GNTB MEMBERS, SPONSORS AND PARTNERS

The extensive GNTB network at home and abroad, the active partnership with its members and sponsors and its many collaborations form the basis for the GNTB's successful role in the worldwide marketing of Destination Germany.

THE GNTB MEMBERS

During the course of 2015, the GNTB continued to expand its productive working relationship with its **73 members, 14 sponsors** and other partners. The interplay of tourism enterprises, regional tourism marketing organisations, trade associations, organisations and marketing associations creates a **multi-layered network** that dynamically strengthens the **expertise** and **international presence** of all participants.

The GNTB currently has 73 members, and membership opens up a multitude of opportunities for the partners. This includes direct access to market research, theme-based marketing and the GNTB's global sales and marketing network. Members can also participate in the most important industry trade fairs or collaborate with us on joint marketing campaigns. The GNTB's contacts, experience and wide-ranging expertise in the industry add value to all inbound tourism activities.

Large strategic partners boost their position in the inbound tourism markets. Small and medium-sized enterprises can participate in the international marketing of Destination Germany.

The GNTB also has an advisory role, in which it supports members in the development of new products and services and acts as a central coordinator.

In accordance with its charter, all companies or organisations of national importance are eligible for GNTB

membership provided that their activities support the aims and objectives of the GNTB.

GNTB members are drawn from a cross-section of industry sectors. More than half of the members are companies. The hotel industry is represented by everything from budget accommodation for young travellers to luxury hotels. All aspects of the transport sector – air, road and rail travel – are also thoroughly covered. Companies providing unique travel experiences in Germany benefit just as much from GNTB membership as those offering simple shopping breaks. Travel insurance providers and other tourism-related companies complete the portfolio of members.


It is a stated aim of the GNTB, in accordance with the remit it has been given by the Federal Ministry for Economic Affairs and Energy, to develop these partnerships and attract new members.

THE DESTINATION GERMANY NETWORK

New members of the GNTB in 2015

Mein Fernbus/Flixbus and Lufthansa City Center International GmbH (LCCI) were admitted as new members of the GNTB in January, followed by the airline Germania Fluggesellschaft mbH and the retail company Galeria Kaufhof in July 2015. Furthermore, the Association of German Nature Parks (VDN) and Toskanaworld GmbH became sponsors on 1 January 2016.

Germania Fluggesellschaft mbH

 The airline Germania, based at Berlin Schönefeld airport, serves more than 140 destinations in Europe, north Africa and western Asia and also connects important source markets such as Spain, Finland, Hungary and Israel to Destination Germany. The GNTB and Germania ran joint marketing activities in 2014 and 2015, which included Germania's participation at the GNTB's Germany Travel Mart, as well as initiatives in the international source markets of the UK, Russia, Austria and Israel.


GALERIA Kaufhof GmbH

 Galeria Kaufhof currently operates more than 100 department stores in over 80 locations across Germany. Its flagship stores in particular, such as in Berlin (Alexanderplatz), Cologne (Hohe Strasse), Düsseldorf and Munich are in locations where there is a high volume of tourists. Offers and services such as tax free shopping or payment in other currencies attract customers from abroad, especially from China.

Association of German Nature Parks (VDN)

 The Association of German Nature Parks is the umbrella association of all nature parks in Germany. Together with its members and partners it forms an extensive network that works to protect areas of natural beauty and develop innovative landscape conservation projects. The association facilitates cooperation between nature parks in Germany and those in Europe, showcases their work and achievements and acts as their political voice.

Toskanaworld GmbH

 The Toskanaworld GmbH group combines leisure, health and happiness health and experiences in the great outdoors with innovative tourism products. Under the umbrella brand toskanaworld, it runs the Toskana Therme spa in Bad Schandau, the Toskana Therme spas and hotels in Bad Sulza and Bad Orb, the medical spa in Bad Sulza and the Schloss Auerstedt hotel resort, which have a total of seven restaurants.

STRATEGIC PARTNERS

Strategic partners play a very important role in the collaborative success of the GNTB network. They are more than just members – they help to shape and promote Destination Germany. They contribute in many different ways, for example by providing transport and accommodation for travel industry professionals and media representatives, by collaborating in marketing campaigns and by continually sharing their expertise.

Deutsche Lufthansa AG

 Lufthansa is one of the world's leading airlines, offering global products and services. The premium air carrier has worked successfully with the GNTB since 1957. Alongside a core level of international cooperation, the partnership incorporates joint sales and marketing ventures in key source markets and emerging markets.

Deutsche Bahn AG

 As one of the world's leading passenger and logistics companies, Deutsche Bahn AG (DB) works in partnership with the GNTB to promote tourism in Germany. Joint international marketing campaigns have been run for a number of years now and this intensive and successful model of cooperation continued in 2015.

MEMBERS AND SPONSORS OF THE GNTB (As at June 2016)

COMPANIES



A • Accor Hospitality Germany GmbH • Air Berlin PLC & Co. Luftverkehrs KG • Amadeus Germany GmbH • Autostadt GmbH • Avis Budget Autovermietung GmbH & Co. KG • B • Best Western Hotels Central Europe GmbH • D • DER Touristik GmbH • Deutsche Bahn AG (DB) • Deutsche Lufthansa AG (LH) • Deutsches Jugendherbergswerk (DJH) • Deutsches Weininstitut GmbH • E • Europa-Park GmbH & Co Mack KG • Europäische Reiseversicherung AG (ERV) • F • FlixBus DACH GmbH • Flughafen Düsseldorf GmbH • Flughafen München GmbH • Fraport AG • Friedrichstadt-Palast Betriebsgesellschaft mbH • G • Galeria Kaufhof GmbH • Germania Fluggesellschaft mbH • Global Blue Deutschland GmbH • Grand City Hotels GmbH • H • HanseMerkur Reiseversicherungsgruppe • L • Lindner Hotels AG • Lufthansa City Center International GmbH • M • Maritim Hotelgesellschaft mbH • McArthurGlen Management GmbH • Messe Berlin GmbH • N • NH Hoteles Deutschland GmbH • O • Outletcity Metzgingen Holy AG • R • Reise Mission GmbH • Relais & Chateaux GmbH • Ringhotels e.V. • Romantik Hotels & Restaurants AG • S • Sixt AG • Staatliche Porzellan-Manufaktur Meissen GmbH • Stage Entertainment Marketing & Sales GmbH • Steigenberger Hotels AG • T • Thomas Cook AG • TUI AG • V • Value Retail Management Germany GmbH • W • Wellness-Hotels-Deutschland GmbH

TOURISM MARKETING ORGANISATIONS OF THE FEDERAL STATES



Bayern Tourismus Marketing GmbH • Berlin Tourismus & Kongress GmbH • Bremer Touristik-Zentrale Gesellschaft für Marketing und Service mbH • HA Hessen Agentur GmbH – Tourismus- und Kongressmarketing • Hamburg Tourismus GmbH • Investitions- und Marketinggesellschaft Sachsen-Anhalt mbH (IMG) • Tourismus NRW e.V. • Rheinland-Pfalz Tourismus GmbH • Thüringer Tourismus GmbH • Tourismus Marketing Gesellschaft Sachsen mbH (TMGS) • Tourismus-Agentur Schleswig-Holstein GmbH (TASH) • TourismusMarketing Niedersachsen GmbH (TMN) • Tourismus Marketing GmbH Baden-Württemberg (TMBW) • Tourismus-Marketing Brandenburg GmbH (TMB) • Tourismusverband Mecklenburg-Vorpommern e.V. • Tourismus Zentrale Saarland GmbH

CORPORATE BODIES, ASSOCIATIONS, FOUNDATIONS, INSTITUTIONS AND ORGANISATIONS



A • Allgemeiner Deutscher Fahrradclub e.V. (ADFC) • **B** • Bundesverband der Deutschen Tourismuswirtschaft e.V. (BTW) • **D** • Deutscher Heilbäderverband e.V. (DHV) • Deutscher Hotel- und Gaststättenverband e.V. (DEHOGA) • Deutscher Industrie- und Handelskammertag e.V. (DIHK) • Deutscher Reiseverband e.V. (DRV) • Deutscher Tourismusverband e.V. (DTV) • **G** • German Convention Bureau e.V. (GCB) • Goethe-Institut • **H** • Historic Highlights of Germany e.V. (HHOG) • Hotelverband Deutschland (IHA) e.V. • **M** • Magic Cities Germany e.V. (MCG) • **R** • RDA Internationaler Bustouristik Verband e.V. • **U** • UNESCO-Welterbestätten Deutschland e.V. • **W** • Willy Scharnow-Stiftung für Touristik

SPONSORS

Since 2009, organisations have also been able to affiliate themselves to the GNTB through sponsorship. This means organisations and companies that are interested in the GNTB, but do not fulfil the membership criteria, can still benefit from the GNTB's worldwide marketing infrastructure. Corporate bodies, associations and foundations from the worlds of research, consultancy, media, the arts and sport are taking advantage of this arrangement. All sponsors belong to the GNTB's Advisory Board and can use the GNTB sponsor logo in their marketing. The GNTB is currently working with 14 sponsors.



B • AG „Barrierefreie Reiseziele in Deutschland“ Dr Carmen Hildebrandt, Spokesperson • Bundesverband der Gästeführer in Deutschland e.V. (BvGD) Dr Ute Jäger, Chairwoman • **D** • Deutsche Gesellschaft für Tourismuswissenschaft e.V. (DGT) Professor Jürgen Schmude, President • **F** • Frankfurter Societats-Druckerei GmbH Peter Hintereder, Editor-in-chief • **I** • IPK International GmbH Rolf D. Freitag, Executive Director • **N** • Nationale Koordinationsstelle Tourismus für Alle e.V. (NatKo) Dr Rüdiger Leidner, CEO • **P** • Pacific Asia Travel Association (PATA) Mario Hardy, CEO • **P** • PROJECT M GmbH Professor E. Kreilkamp • **R** • Romantische Strasse Touristik Arbeitsgemeinschaft GbR Jürgen Wünschenmeyer, Managing Director • **S** • Schlösser und Gärten in Deutschland e.V. Dr Christian Striefler, Director • **T** • Toskanaworld GmbH Klaus Dieter Böhm and Marion Schneider, Managing Directors • TourComm Germany GmbH & Co. KG Mike Adams, Managing Director • Tourismusverband Sächsische Schweiz e.V. Tino Richter, Managing Director • **V** • Verband Deutscher Naturparke e.V. (VDN) Ulrich Köster, Managing Director

COLLABORATION WITH GNTB MEMBERS

Implementation of strategic goals and theme-based campaigns with cooperation partners in 2015

ADFC



The German Cyclists' Federation (ADFC) represents the interests of cyclists in Germany and champions the cause of low-impact transport. The ADFC quality-certified routes are a seal of approval for cycling tourism in Germany. As part of the extensive relaunch of its online presence, the GNTB, which markets cycling as a core theme, is promoting the ADFC's 'Discover Germany by bike' products by showcasing over 80 long-distance cycle routes, plus other long-distance cycle routes that are relevant for international marketing, at www.germany.travel/cycling.

German Spa Association (DHV)



The German Spa Association (DHV) represents the interests of more than 350 quality-certified spa resorts in Germany and their federal organisations at regional and state level. The objective of the DHV is to provide an assurance of quality, to develop products and to promote health-related travel to the various spa towns. The GNTB and the DHV work in partnership to promote health-oriented tourism to prospective visitors from abroad as part of the GNTB's core health and wellness theme. The cooperation agreement was extended in 2015.

Magic Cities Germany e.V.



Over 40 per cent of international overnight stays in Germany are made in the member cities of Magic Cities Germany e.V. (MC). The cooperative marketing venture comprises ten leading city destinations: Cologne, Dresden, Düsseldorf, Frankfurt, Hamburg, Hannover, Leipzig, Munich, Nuremberg and Stuttgart. Since 2015, the marketing association has focused its joint activities on the markets Brazil and China, and will also target the USA from 2016 onwards. As a result, the Magic Cities' strategy is firmly centred on fast-growing source markets with good potential for the future.

Historic Highlights of Germany e.V.



The members of the cooperative marketing venture Historic Highlights of Germany (HHoG) are all university cities that are at least 700 years old and play a prominent role in Germany's inbound tourism industry. In early 2015, Regensburg became the 14th member of this marketing venture, which uses the Magic Cities umbrella brand to promote the history, culture and atmosphere of its member cities in the USA, Japan and China overseas, and in the UK and Italy in Europe.

German Convention Bureau and AUMA



By working closely with the German Convention Bureau (GCB) to market promotable business travel to Germany, the GNTB is able to harness synergies and strengthen its portfolio in this segment, putting a particular focus on promoting green meetings. The GNTB also collaborates closely with the Association of the German Trade Fair Industry (AUMA) to promote Germany as a location for international trade fairs and exhibitions.

German UNESCO World Heritage Sites Association



The German UNESCO World Heritage Sites Association promotes low-impact, specialised and sustainable tourism to Germany's World Heritage sites, which are some of the country's most popular attractions. It has been a member and marketing partner of the GNTB since 2010. The joint marketing activities conducted by the GNTB and the German UNESCO World Heritage Sites Association were stepped up for the GNTB's global theme-based campaign 'UNESCO World Heritage – Sustainable cultural and natural tourism' in 2014. During 2015, the focus of the cooperation was on the successful activities in the key UK and Italian markets.

German Wine Institute (DWI)



The GNTB and DWI pool their resources to conduct joint marketing and communications activities. One of the aims of the collaboration is to promote tourism in rural regions. The focus of the

collaboration in 2015 was the integration of more than 50 wine festivals into the GNTB's events database under the category 'Wine & culinary delights'.

CAMPAIGNS WITH OTHER COOPERATION PARTNERS

Beyond the circle of its members the GNTB is very well connected both at national and international level. Strong partners provide valuable support in our international marketing activities.

Atout France



The GNTB is working closely with its French counterpart, Atout France. The agreement, signed in 2014 and initially running for three years, will see the two organisations coordinate activities and provide mutual support with marketing campaigns in their domestic markets. Work will be focused on areas such as market research, press conferences, press tours, promotional campaigns, initiatives with tour operators and online activities and will be aimed at driving demand for France and Germany as travel destinations. In 2015 the partners delivered a cross-media campaign in both countries based on the theme of cycling tourism.

Danube Competence Center (DCC)



The GNTB has been a member of the pan-European partnership of Danube region countries since 2010 and is active in the Danube Strategy Steering Group of the EUSDR (EU Strategy for the Danube Region). In partnership with the DCC, the GNTB runs a sales and marketing agency in Belgrade that promotes Germany in the increasingly important source markets in this region. It also promotes the German regions along the river as part of the marketing initiative 'The young Danube'.

At the Danube Floating Conference in 2015, the GNTB highlighted key issues for the future and emphasised the importance of sustainable tourism for the brand image of a destination.

EUROPARC



With a view to the 2016 theme-based campaign 'Holidays in the heart of nature – Germany's national parks & nature parks', the GNTB has teamed up with EUROPARC, which represents the interests of all protected national landscapes in Germany. EUROPARC provides support to the organisations that run the parks, as well as to associations, foundations and sponsors. Its overall aim is to protect natural beauty, preserve it for the future and improve the visitor experience.

DACH-Meetings



Every six months, the heads of the national tourism organisations of Germany, Austria and Switzerland meet to discuss current trends and to coordinate joint projects. This includes activities run by the Alpine Tourist Commission (ATC), the promotion of the Danube regions and the delivery of the GNTB's theme-based campaigns.

The German Coastal Association



The German Coastal Association (Deutsches Küstenland, or DKL) is a collective of the regional marketing organisations of the five north German federal states (Hamburg, Bremen, Schleswig-Holstein, Lower Saxony and Mecklenburg-Western Pomerania) and the Hanseatic city of Lübeck. Their marketing activities are connected by a common maritime theme. The GNTB works together with DKL to present a more multifaceted image of Germany to markets abroad. The main markets for the collaboration are Italy and Russia.



Accommodation for every taste and every budget

For this **roundtable**, we interviewed GNTB members from the **hotel industry**. Their replies are given below.

Ernst Fischer, DEHOGA Figures from the Federal Statistical Office indicate that the hospitality industry grew by 4.5 per cent in 2015, which represents the strongest nominal increase in revenue for more than two decades. The hotel and catering sectors together generated net revenue of €77.1 billion. Our industry, which is all about variety, hospitality and enjoyment, benefited from the stable economy and the high level of consumer confidence. What's more, Germany is a popular place to visit at the moment. The upward trend in employment also continued: in September 2015 the industry set an all-time high with 1,013,300 employees.

Because of the stability of the economy as a whole, the mood at the start of the year was positive in the hotel and catering sectors. For 2016 we expect moderate nominal growth in revenue of between 2 per cent to 2.5 per cent. However, there are a considerable number of uncertainties and unresolved issues. The impact of the minimum wage, the inflexible regulations on working hours, the costs involved in allergen labelling and the charges incurred through the municipal bed tax are all causing headaches in the industry. But getting people and skilled labour into the industry and keeping them there remains our biggest challenge. The hospitality industry is an international and cosmopolitan sector and is doing a great deal to integrate refugees by providing training and employment.

How would you and your organisation sum up **2015** in terms of **inbound tourism** compared with previous years?
What **trends and challenges** do you anticipate for **2016**?

Fritz G. Dreesen, IHA The hotel industry in Germany continues to be on an upward trajectory. According to figures from the Federal Statistical Office, the number of overnight stays in hotels, inns and guesthouses climbed 3.4 per cent last year to just over 272 million. This will be the sixth year running that the sector has reported record results. Particularly encouraging is Germany's continuing popularity among international travellers. The domestic hotel business is excellently positioned and is among the best in the world in terms of product quality, range of services and value for money. Hotels generated nominal net revenue of €24.1 billion in 2015, an increase of just under 4.2 per cent.

We are optimistic about the prospects for the current year and, in light of the positive economic conditions, we anticipate an increase in overnight stays and a

The Schnoor quarter, Bremen



Ernst Fischer
President of the German Hotel and Restaurant Association (DEHOGA)

Fritz G. Dreesen
Chairman of the German Hotel Association (IHA)

René Halla
Global Sales Director
Maritim Hotelgesellschaft mbH

Carmen Dücker
Deputy Managing Director
Best Western Hotels Central Europe GmbH, Eschborn



Susanne Weiss
Chief Executive Officer
Ringhotels

Bernd Dohn
Chief Executive Officer
German Youth Hostel Association (DJH)

Alexander Hörner
Head of Sales,
Steigenberger Hotel Group

nominal increase in revenue of around 2 per cent. That said, the challenges we face are formidable. Despite the positive results, the hotel market continues to be affected by surplus capacities. We are currently experiencing a wave of consolidation on an unprecedented scale. There is now greater concentration, both in terms of companies and brands. It is more important than ever for businesses to have a clear profile and to be consistent with their positioning. It is also necessary to find a balance between the opportunities and risks connected with digitisation. Our association is campaigning for a ban on any kind of anti-competitive parity clauses for websites and, together with the GNTB, are calling for a level playing field to ensure fair competition. For us it is about preserving or reinstating commercial freedom, nothing more. Part of this involves working in an environment that is conducive to business. We can only warn against further regulations and financial encumbrances imposed by policymakers.

René Halla, Maritim We are very satisfied with our business performance in 2015. Inbound tourism has proven to be extremely stable for us. The results from our international source markets were even better across the group than they were in 2014, which had been a record year for us. We registered high levels of growth from Asia and North America and also saw increases of well over 20 per cent from the Arab Gulf States.

We believe the many political conflicts and the gradual slowdown of the global economy to be the biggest challenges facing us in 2016. We are therefore investing very heavily in our product so that we can be more competitive in the international market. In addition, we

are expanding our sales activities in a number of markets in Asia and Latin America. Overall we anticipate stable growth in the inbound tourism business.

Carmen Dücker, Best Western Hotels With regard to inbound tourism, we can confirm that Best Western hotels in Germany's major cities, such as Berlin, Hamburg, Frankfurt, Cologne and Düsseldorf, were the most popular with foreign visitors in 2015, as had been the case in previous years. That said, we have also experienced growing demand in medium-sized German towns, those with a population of 10,000 to 100,000. We will continue to monitor and analyse this trend in 2016, as many Best Western hotels across Germany are situated in exactly these locations.

Our focus in 2016 for our brand and for Best Western hotels will be firmly on our new organisational structure and our business in Europe. As of the beginning of this year, the new company Best Western Hotels Central Europe GmbH will be overseeing more than 240 hotels in ten European countries – namely, Germany, Luxembourg, Liechtenstein, Switzerland, Austria, the Czech Republic, Croatia, Slovenia, Slovakia and Hungary. Best Western is taking this step in order to become more cohesive in Europe, to function more effectively in the market and to exploit potential for growth. There will also be many new and exciting opportunities and collaborations for us, our customers and our partners in important source and target markets.

We see the current market concentration and the growing dominance of large hotel groups as a challenge. It is therefore important to offer our individual

hotel operators professional tools and services to help them to prosper in this increasingly competitive environment.

Susanne Weiss, Ringhotels We believe that Germany's tourism industry is performing well and were able to register positive results for our Ringhotels in 2015. Our core brand 'Echt HeimatGenuss erleben' (in English 'The Pleasures of Home'), which was launched in 2015, helped the Ringhotels alliance to achieve these results.

The trend towards authentic products and high quality is bringing us continued growth, which is reflected in our online bookings on IBE. All in all, we can say that we have created more demand than expected as a result of the changes to our brand.

We hope to be able to register even more bookings for our Ringhotels in 2016. We hope that this will be helped by the Heimat (home) trend, the popularity of our core brand and the associated products, which take the form of a special package and menu available at all Ringhotels. It is nonetheless important to continue addressing the challenges we face: increasing the number of our direct bookings, succession planning, and the issue of future-oriented funding models for the private hotel business.

Bernd Dohn, DJH 2015 went well for the German Youth Hostel Association (DJH). Once again we registered more than ten million overnight stays overall. This figure has gone up every year since 2007.

The growth in inbound tourism was also very encouraging. There was a slight increase in the number of visitors from abroad, with more than 808,000 overnight stays registered. This is an increase of 25,000 overnight stays, which represents a 3 per cent rise. The majority of visitors came from the neighbouring countries of France, the Netherlands and Switzerland.

The German Youth Hostel Association expects this positive trend to continue. The increase in the number of overnight stays by foreign visitors in recent years certainly suggests that this will be the case. Furthermore, our non-profit association is making every effort to strengthen its position in the international market, including by collaborating with the GNTB. In 2016 we will be teaming up with the GNTB to organise research trips for international bloggers.

Alexander Hörner, Steigenberger For the Steigenberger Hotel Group, the most important source markets for Germany are still the USA, the UK, France and the Benelux countries. We saw further growth from a number of markets. Last year we opened new international hotels in the Netherlands, Spain, Turkey and the United Arab Emirates. In doing so we raised the awareness of the Steigenberger brand in those countries, which will in turn drive demand for our hotels in Germany. We are also expanding our international sales network and will continue to rely on our solid partnership with the GNTB.



Timeless. The banking district in Frankfurt, Hessen

SALES AND MARKETING STRATEGY

As a brand, Destination Germany is in competition with other European destinations. In order to enhance the brand profile, the GNTB makes strategic and targeted use of the marketing mix. The GNTB's sales and marketing strategy is based on the core Destination Germany brand and two of its facets, culture and nature. In its positioning of marketing messages, the GNTB is rigorously following its now established approach of focusing on the end customer. Online and social media marketing are the central platforms for this strategic, theme-based marketing.

DIGITISATION – STRATEGY FOR THE FUTURE

The GNTB's **global marketing** for Destination Germany is underpinned by in-depth **market research**. A wide range of sources from home and abroad are utilised for all **potential markets**. The findings of these analyses are evaluated in order to determine market-specific opportunities and risks and to decide on **recommended courses of action**.

Within the two product lines Towns, Cities & Culture and Nature and Health, various basic themes have been defined that provide a long-term foundation for market development activities using the full range of marketing tools. Accessibility and sustainability, both important issues with relevance for the future, are core facets of the Destination Germany brand. These cross-product-line topics are driven by the GNTB's innovations management team.

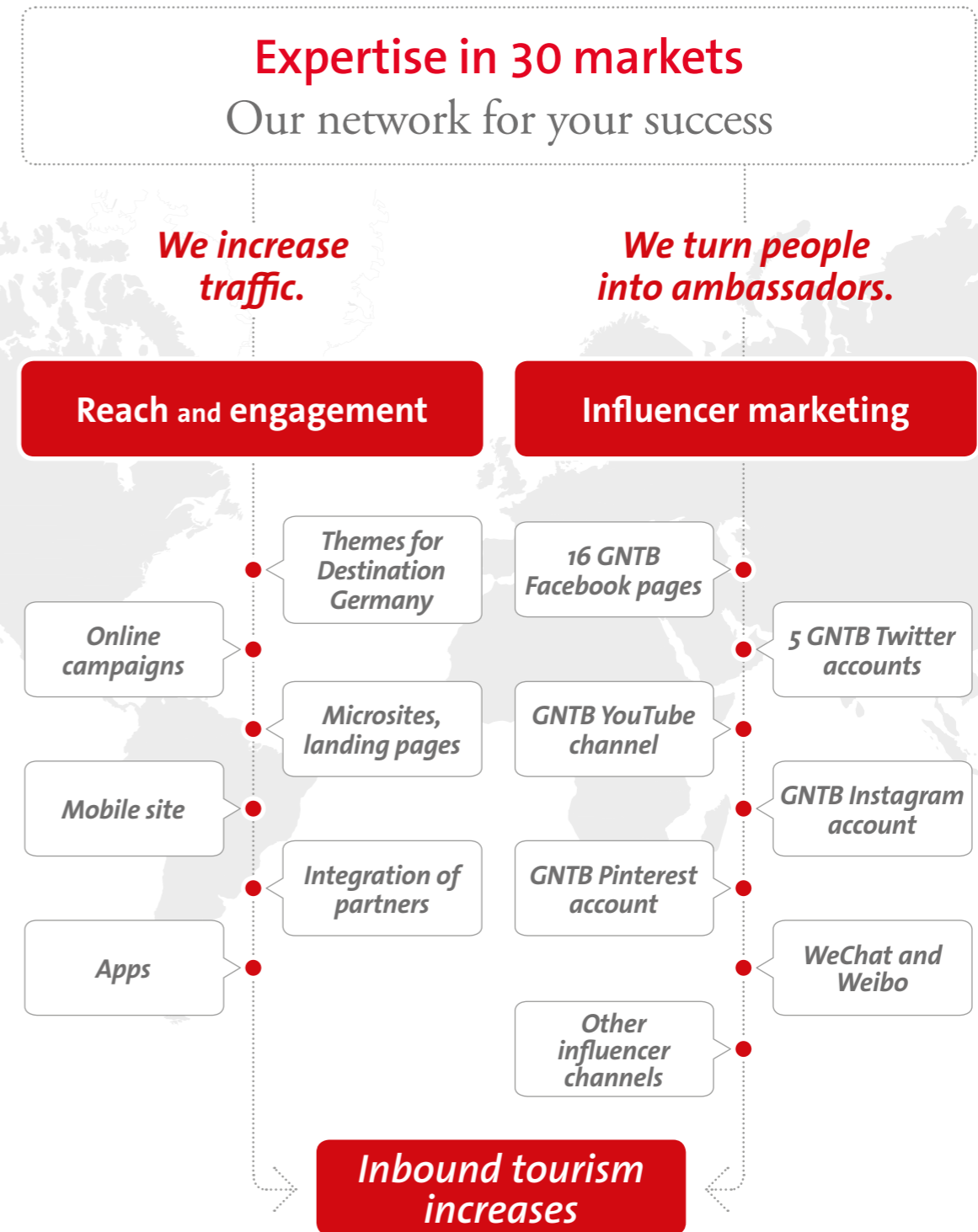
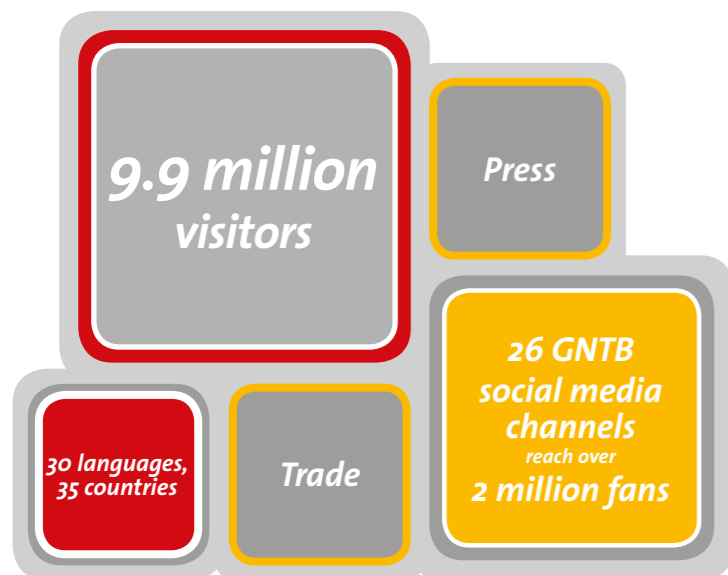
The GNTB's international marketing activities are tailored to the respective market and implemented using a wide range of marketing tools for the three pillars of communication: consumers, the travel trade and the media.

The GNTB primarily reaches out to consumers in the various markets using online marketing. The main medium is its website www.germany.travel. In the planning of its activities, the GNTB is therefore taking account of the changes in communication patterns that have been ushered in by new media and the use of mobile devices. The GNTB is expanding its social media activities all the time in order to build its image and deliver theme-based campaigns.

Owing to cost considerations, the GNTB limits its presence at consumer fairs to those that are particularly relevant for specific markets and themes. Promotional activities complete the marketing portfolio aimed at consumers around the world.

The GNTB website is also the primary B2B platform for communicating with the global travel industry. To facilitate the exchange of information and to conduct targeted sales activities, the GNTB hosts its own workshops and roadshows and exhibits at flagship travel fairs together with partners. Other trade activities include seminars for travel agents in the source markets, sales calls and fact-finding tours in Germany.

www.germany.travel



The international press corner at the website www.germany.travel is the first port of call for media representatives reporting on travel to Germany. Journalists will find the latest press releases, press newsletters and a wealth of information on marketing themes. Theme-specific PR events in the markets and

press highlight tours in Germany provide more in-depth information on the country and its people as well as focusing the attention of journalists on the GNTB's core themes. The social media marketing team is responsible for blogger relations owing to the specific nature of this work and the distribution channels.

ONLINE MARKETING STRATEGY

Around **2.9 billion people** globally – equal to 38 per cent of the world's population – use the **internet** and can be reached online as potential customers. **Two thirds** of all products and services in the tourism sector are now booked via the web. **More than four fifths** of all European travellers visiting Germany in 2015 used the internet while planning their trip, either to find information or make a booking. The proportion of **internet users** rises to **84 per cent** for people coming to Germany from **overseas**.

At the same time, the role of the customer has continued to change: their inspiration has a bearing on capacity, their booking behaviour influences pricing, their actual experiences affect the perception of a destination or provider and thus future demand. The digital customer journey is the common thread running through communication.

That is why the GNTB constantly adds theme-specific content and new functions in order to enhance its website www.germany.travel – its main information, marketing and sales platform.

In 2015 the GNTB's online presence included 35 country-specific sites in 30 languages. The variety of languages available ensures potential customers in a wide range of countries have access to comprehensive information, but it also improves the search engine ranking in the different markets, thereby attracting more traffic.

www.germany.travel
22 per cent of visitors
 (2.1 million) used a mobile device

The GNTB website's particular strengths lie in its contemporary multimedia presentation of Germany using photos, panoramas and videos. The recently updated and user-friendly mobile site in particular, which now boasts its own channel in the Content Management System (CMS) and its own design, is setting new standards. Interactive maps include a multitude of points of interest that lead to over 12,000 pages of extended content, and the route planner makes the visual planning of holidays easier for the user. An internal search function enables users to easily access all of the information. To increase traffic to the website, the GNTB sends out its own newsletters and uses targeted online marketing campaigns on sites relevant to its themes. Google AdWords and Display campaigns and programmatic marketing campaigns are also used successfully. To ensure its website is inclusive, the GNTB works continuously to improve accessibility, for example by increasing the contrast or providing a tool for adjusting the size.

www.germany.travel
 Over **21 million** page views – up by
36.5 per cent compared with 2014

Strategic action areas to further optimise online marketing

1. WWW.GERMANY.TRAVEL – THE GNTB'S PRIMARY ONLINE MARKETING PLATFORM

The website offers high-quality content in a number of languages. It provides inspiration and information ahead of a trip and is systematically extended and updated on the basis of the latest data.

2. MOBILE SITE

It provides quick access to condensed information, optimised for mobile devices, and is a source of ideas for travellers who are on or just about to go on a trip and who can then share or comment on the content.

3. APPS

The GNTB currently offers three apps that provide local information to complement the website. Their added value lies in the locational data, details of events, timetables and insider tips that they contain. For example, the UNESCO app.

4. CONTENT

The GNTB's 38,000 in-depth content pages in 30 languages are a fantastic source of high-quality content. At www.germany.travel, there are over 560 videos and 12,000 photos in the media gallery alone. This content is continually augmented with user-generated content and optimised for users and search engines.

5. SOCIAL MEDIA

The GNTB successfully communicates via relevant social media worldwide. For example, it was able to improve its engagement rates in the most important social networks such as Facebook and Instagram as well as in WeChat and Weibo in the Chinese market. This increasing interaction with potential travellers has a lasting impact on the success of our annual theme-based campaigns.

6. ANALYSIS

Data on user engagement has been added to the market-specific dashboard. The web analysis tool has been extended with campaign tracking that allows for end-to-end monitoring of the impact and reach of online campaigns. The continuous improvement of usability is being driven by heatmap analyses.

7. MARKETING

From a marketing perspective, www.germany.travel is a website targeted at keen international travellers with an interest in Germany that provides a multitude of opportunities to reach customers from specific markets and with specific interests, especially for smaller advertisers. The same applies to other GNTB media channels such as the newsletters and microsites.

8. PARTNER INVOLVEMENT

The GNTB's members and partners can select from a broad range of options, from simply having their offerings advertised to involvement in joint cross-media and cross-market campaigns.

The information available at www.germany.travel is multi-layered, with the content provided by the GNTB on the various different themes complemented by user-generated content acquired through social media activities. New, high-quality content is continuously generated, increasing the breadth of information available, which is then summarised on social walls and filtered by theme.

Through its website, presence on various social media, and mobile apps, the GNTB covers all of the relevant platforms. Reflecting how the market has changed as a result of digitisation and the new role of the customer, the GNTB is developing an end-to-end user experience that ties in with the never-ending customer journey: seeking inspiration for travel, doing the planning, undertaking a trip, reflecting on experiences, and sharing impressions to provide new inspiration.

SOCIAL MEDIA STRATEGY

At the GNTB, **social media marketing** (SMM) is a strategic element of corporate communications and is integral to **online marketing**, helping to ensure that all communications are focused on the end customer. SMM is used for **image building** and for general **positioning** of the Destination Germany brand and also in the delivery of **theme-based campaigns**.

The main aims are to increase customer loyalty (traffic and engagement) and generate content. The technical possibilities of social media extend the reach of our communications activities in quantitative terms. From a qualitative perspective, the authenticity of the content strengthens the credibility of the brand.

THE KEY TRENDS IN 2015: INFLUENCER RELATIONS – STORYTELLING – NEW PLATFORMS

The GNTB again focused on the use of influencers in social media during 2015. Compared with the previous year, the range of platforms used increased significantly. In addition to working with bloggers, the GNTB also cooperated with influencers who are well-known on other relevant platforms. And for the first time it relied on organised tours for selected international Instagrammers – as part of the Traditions and Customs campaign – to communicate the campaign better and more professionally in social media. The influencers were an important factor in communicating content, particularly to younger target groups. They also made

@germanytourism:
Number of followers on Instagram
increases from 12,000 to over
50,000 in 2015.

an important contribution to popularising the campaign hashtag #JoinGermanTradition, which has been reused by many users since. Over 13,000 instances of user-generated content were recorded under this hashtag on Instagram alone. The hashtag was also highly successful on other platforms. You can find a collection on the social wall at www.germany.travel/joingermantradition.

Social media that enable users to swap, edit and rate photos and videos are becoming increasingly popular. With more than 400 million active users worldwide, Instagram is currently one of the best online photo platforms in terms of generated output, credibility on social media and market coverage.

The content from the Instagram tours generated over **2 million** likes and a reach of **14.8 million** in 2015.

STORYTELLING AND NEW PLATFORMS

A further central aspect of social media marketing in 2015 was the increasing use of storytelling. Under the banner 'The best travel stories from Destination Germany', more than 40 influencer tours were organised so that the core narrative Join German Tradition could be communicated in various ways in the form of authentic stories. In December 2015, the GNTB also set up an international account on Pinterest.

SWAPPING EXPERIENCES: SOCIAL TRAVEL SUMMIT AND SOCIAL MEDIA DAY

The GNTB underlined its leadership in social media marketing with further activities that gave it a chance to share its expertise. The second Social Travel Summit was held in Hamburg in April 2015, with the GNTB as co-initiator and partner. During this two-day event at the EAST Hotel in Hamburg some 150 major players from the travel industry met with online marketing experts and 60 established international travel bloggers to discuss the latest trends and developments in social media marketing, and especially with regard to blogger relations.

At the third Social Media Day in Frankfurt the GNTB presented current developments in online and social media marketing for the tourism industry and introduced examples for their practical implementation over two day-long workshops. Around 70 representatives from tourism marketing organisations, the hotel industry, transport companies and marketing agencies from across Germany gathered at Frankfurt's Maritim Hotel on 10 and 11 September for the Online and Social Media Day. Central strategic action areas, projects, opportunities for participation, practical examples of digital destination marketing in the USA as well as the GNTB's social media activities and blogger campaigns were all on the agenda.

FORWARD THINKING: THE GNTB SOCIAL MEDIA LAB

The GNTB developed another format in 2015 that builds on existing expertise to develop new solutions. The Social Media Lab has been conceived as an internal platform for the sharing of information about current trends in social media and online marketing and for the delivery of projects that are part of the GNTB's theme-based marketing.

DESTINATION GERMANY FILM

The GNTB set up an international film competition on behalf of Germany's Federal Ministry for Economic Affairs and Energy (BMWi). It aimed to create the first international video project that authentically portrays all that Germany has to offer as a destination from the traveller's perspective. During the year under review, the GNTB organised an international competition. The eight winners that were involved in producing the film between August and September 2015 received logistical support from the GNTB during their travels. At the end of the tours the footage that had been generated was edited into a four-minute film. This is being used in the international marketing for Destination Germany, especially in social media.



The GNTB Social Media Day on 11 September 2015 in Frankfurt

DESTINATION GERMANY AT SELECTED, INTERNATIONAL FLAGSHIP TRADE FAIRS

As part of the ongoing refinement of its **sales and marketing strategy**, the GNTB concentrated its presence at trade events to a few carefully **selected flagship trade fairs**, where it positioned Destination Germany **internationally** to professionals from the tourism industry and prospective customers. The GNTB coordinates and organises its **appearances at trade fairs as joint projects with its partners**.

ITB BERLIN 2015 – INBOUND TOURISM ENJOYS A FIFTH SUCCESSIVE RECORD YEAR

International press conference on the opening day

- International press conference attended by around 100 media representatives
- Core message: the GNTB presents record results – over 75 million international overnight stays for the first time
- Overseas markets continue to show strong growth
- Traditions and Customs campaign

Discussion and dialogue at the parliamentary breakfast

- Around 50 invited guests, including parliamentarians and staff on the German Bundestag's Tourism Committee and the Federal Ministry for Economic Affairs and Energy, met with GNTB managers
- Tourism policy spokespersons for Germany's political parties presented their positions
- GNTB representatives provided practical examples of international marketing in Israel and China

Parliamentary evening held in conjunction with Messe Berlin

- Networking events held in conjunction with Messe Berlin well attended by around 300 decision-makers from the industry
- Petra Hedorfer, Chief Executive Officer of the GNTB, receives an award from the Tourism Committee of the German Bundestag

Barrier-free Tourism Day at the ITB – a future theme for the GNTB

- Fourth time the event is held as part of the ITB congress
- Keynote speaker Taleb Rifai, Secretary-General of the UNWTO
- Event partner: National Coordination Board Tourism for All (NatKo)
- Far-reaching opportunities for accessibility: tourism for all also means convenience for all – everything should become easier to read, understand and access. This makes accessibility economically attractive and shapes the image of destinations and companies.
- Distinguished speakers from regional tourism organisations and tourism providers as well as experts from the barrier-free travel working groups

IMEX IN FRANKFURT

The GNTB participated in the 13th IMEX in Frankfurt alongside its strategic partner, the German Convention Bureau.

- Germany stand, featuring the GNTB, GCB and more than 230 other exhibitors
- Main themes: sustainability, expertise in business and science, future and innovation
- Key finding of the latest meetings and events barometer: Germany's events market remains on a path of growth; 383 million people attended events at venues in Germany in 2014 – a year-on-year rise



of 3.3 per cent. Visitor numbers have risen every year since 2009.

- The number of international attendees grew faster than the market as a whole: up by 9 per cent to 25.6 million.



Above: Barrier-free Tourism Day with keynote speaker Taleb Rifai, Secretary-General of the United Nations World Tourism Organization (UNWTO), Iris Glicke, Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy and Federal Government Commissioner for SMEs, Tourism and the New Federal States, and Petra Hedorfer, Chief Executive Officer of the GNTB

Below, from left to right: Klaus Brähmig, Member of the German Parliament and Deputy Chairman of the Tourism Committee of the German Bundestag; Petra Hedorfer, Chief Executive Officer of the GNTB; and Members of the German Parliament Kerstin Kassner, Heike Brehmer, Chair of the German Bundestag's Tourism Committee, Stefan Zierke, Markus Tressel and Daniela Ludwig at the presentation of an award, a lead-crystal sphere, to Petra Hedorfer at the 2015 ITB

OUTLOOK FOR 2016

At the 2016 ITB the GNTB was once again able to present record results for inbound tourism. Almost 80 million international overnight stays represent the sixth successive inbound tourism record.

SETTING THE AGENDA WITH WORKSHOPS AND ROADSHOWS

As well as exhibiting at selected international trade fairs, the GNTB organises its **own events, workshops and roadshows** at which it takes centre stage. These platforms have been specially designed to enable the GNTB's **German tourism partners** to continually add to their contacts and networks in the **international travel industry**. They are accompanied by roadshows that promote particular themes to target groups in relevant **markets**.



2015 GTM Germany Travel Mart™ in Thuringia

41st GTM GERMANY TRAVEL MART™ IN THURINGIA

More than 500 hosted buyers and journalists from 45 countries took up the GNTB's invitation to attend Destination Germany's flagship B2B platform. The hosts for the 2015 GTM were Thüringer Tourismus GmbH together with the cities of Erfurt and Weimar. The central element of the GTM was a two-day inbound tourism workshop at Messe Erfurt exhibition centre, giving exhibitors and buyers plenty of opportunities for networking, carrying out business development and signing new deals.

- Almost 18,000 meetings arranged using the GNTB's online networking tools
- Survey of suppliers immediately after the event: 98 per cent of participants were 'satisfied' or 'very satisfied' with the 2015 GTM
- Nearly 90 per cent of exhibitors said they wanted to also attend the 2015 GTM in Magdeburg
- Almost 70 per cent have already decided that they will definitely attend the next GTM.

Continuing on from previous years, the GNTB ran the 41st GTM as a green event. Sustainable measures included offsetting the carbon emissions of delegates'

international travel, offering transfers on public transport during the event, providing catering that uses locally sourced ingredients and opting for reusable plates and cutlery.

Social media activities for the GTM

- Live feeds via Twitter and Storify
- Around 700 tweets using the hashtag #gtm15 before, during and after the GTM
- Reach via Twitter: more than 120,000 users and 1 million impressions
- Feeds at www.germany.travel/gtmlive accessed more than 1,500 times

2016

Next stop for the GTM Germany Travel Mart™ was Saxony-Anhalt, a region in which it was making its debut. The 2016 GTM, the largest inbound tourism workshop for the German travel industry, was held in Magdeburg from 17 to 19 April 2016. The GNTB organised the event together with Magdeburg Marketing Kongress und Tourismus GmbH.

Magdeburg, the city of Emperor Otto, presented itself as professional and diverse. The main focus was on the anniversary of the Reformation in 2017, which will also be the theme of a GNTB campaign in 2017.

CENTRAL EUROPE WORKSHOP

Key players from the travel industry attended a Central Europe Workshop organised by the GNTB on 11 and 12 October 2015. The fifth edition of the workshop, held in Leipzig, proved the strength of this platform in bringing fast-growing markets and topics with future relevance



2015 Central Europe Workshop in Leipzig, seminar with Volker Bremer, Managing Director of Leipzig Tourismus und Marketing GmbH

under one roof. A particular aim of the workshop is to further increase the number of visitors from high-potential source markets.

- More than 100 international hosted buyers and journalists from 13 growth markets
- Delegates from Austria, Poland, Russia, the Czech Republic, Romania, Hungary, Slovakia, Bulgaria, Slovenia, Croatia, Ukraine, Serbia, Bosnia and Herzegovina, and Montenegro
- Workshop in the congress hall at Leipzig zoo with representatives from 40 German tourism organisations
- Three tours of selected regions of Saxony prior to the convention
- Focus on tourism products for the 'Holidays in the heart of nature in Germany' and 'Cities of art and culture' campaigns

A look ahead to 2016

The GNTB will organise the next Central Europe Workshop in Halle (Saale) on 16 and 17 October 2016.



2016 GTM Germany Travel Mart™ in Magdeburg

TRADE FAIRS AND WORKSHOPS 2016 / 2017

In the form of **sales-focused trade fairs** and its own **workshops** and **roadshows**, the GNTB offers its partners in the German tourism industry an ideal platform for **targeting key accounts** in the international source markets. The focus of these events is on bringing together supply and demand as part of a professional **B2B marketplace**.



Country	Venue	Type*	Name	Date
TRADE FAIRS				
Germany	Berlin	T	ITB Berlin	8 – 12 Mar 2017
Germany	Frankfurt am Main	T	IMEX Frankfurt	16 – 18 May 2017
GERMANY WORKSHOPS				
Germany	Halle (Saale)	W	Central Europe Workshop	16 – 17 Oct 2016
Germany	Nuremberg	W	GTM Germany Travel Mart™	7 – 9 May 2017
REGIONAL MANAGEMENT NORTH EAST EUROPE				
Russia	Moscow	W	Medical travel workshop	8 Sep 2016
Russia	St. Petersburg, Moscow, Kazan	R	Russia Roadshow	10 – 15 Oct 2016
Scandinavia	MS Color Fantasy, Oslo-Kiel	W	North Europe Workshop	24 – 25 Oct 2016
Poland	Gdansk, Warsaw, Katowice	R	Poland Roadshow	16 – 18 Nov 2016
Denmark	Herning	T	Ferie for Alle	24 – 26 Feb 2017
Russia	Moscow	T	German Travel Industry Day during MITT Moscow	14 Mar 2017
REGIONAL MANAGEMENT NORTH WEST EUROPE				
Netherlands	Amsterdam	W	ReisMarkt Duitsland	15 Nov 2016
Belgium	Brussels	W	Trade and Travel Agency Workshop	16 Nov 2016
Netherlands	Utrecht	T	Vakantiebeurs	10 – 15 Jan 2017
UK	London	W	Germany Travel Show	9 – 10 Feb 2017
REGIONAL MANAGEMENT SOUTH EAST EUROPE				
Austria	Vienna	T	FERIEN-Messe Wien	12 – 15 Jan 2017
Austria	Linz, Innsbruck	R	Austria Roadshow	tba

Country	Venue	Type*	Name	Date
REGIONAL MANAGEMENT SOUTH WEST EUROPE				
Italy	Rimini	T	TTG Incontri	13 – 15 Oct 2016
Spain	Madrid, Barcelona	W	'Meet Germany' Trade and Travel Agency Workshop	26 – 27 Oct 2016
Switzerland	Zurich	T	FESPO	26 – 29 Jan 2017
France	Strasbourg, Lyon, Paris	R	2017 Roadshow	February 2017
Italy	Rome, Milan	W	Trade and Travel Agency Workshop	End of March 2017
REGIONAL MANAGEMENT AMERICAS / ISRAEL				
USA/Canada	Toronto, Denver, San Diego, San José	R	Destination Germany West Coast Roadshow	19 – 22 Sep 2016
Brazil	Rio de Janeiro, Belo Horizonte, São Paulo	R	Destino Alemanha Roadshow	18 – 20 Oct 2016
USA/Canada	tba	R	Destination Germany East Coast Roadshow	Spring 2017
Israel	Tel Aviv	W	Israel Workshop	June 2017
REGIONAL MANAGEMENT ASIA / AUSTRALASIA				
Australia	Melbourne, Brisbane, Sydney	R	Australia Roadshow	7 – 10 Nov 2016
China/Hong Kong	Beijing, Shanghai, Guangzhou, Hong Kong	R	China Roadshow	14 – 18 Nov 2016
India	Mumbai, Chennai, Kolkata, New Delhi	R	India Roadshow	28 Nov – 2 Dec 2016
Gulf States	tba	R	Dallal fi Almania – Gulf States Roadshow	1st quarter of 2017
China	Nanjing, Hangzhou, Xiamen, Chongqing, Chengdu	R	Spring Roadshow China	26 Feb – 3 Mar 2017
Gulf States	Dubai	T	ATM	24 – 27 Apr 2017

*T = Trade fair / exhibition

W = Workshop

R = Roadshow

THEME-BASED MARKETING REVIEW OF 2015

Through its theme-based marketing the GNTB positions Destination Germany as a unique brand within the international travel market. Culture and nature are two key facets that are firmly enshrined in the core Destination Germany brand. These basic themes are continually highlighted in order to enhance the brand profile, while theme-based campaigns that change each year add new dimensions for opening up new target groups and markets.



REVIEW OF GNTB THEME-BASED CAMPAIGNS IN 2015

Theme-based campaigns, anniversaries and major events promote particular aspects of Destination Germany, and the GNTB uses a wide range of marketing activities to deliver these. Online and offline PR and social media activities are increasingly being used to promote Destination Germany. In 2015 the theme **‘Traditions and Customs’** was the focus of the GNTB’s marketing activities. Other key themes included ‘Scenic routes of Germany’ and ‘500th anniversary of the birth of Lucas Cranach the Younger’ as part of the Luther decade, while the **‘Germany Reunified. 25 years on’** campaign entered its second year. Another important marketing theme in 2015 was the ‘German Danube’.

THE ‘TRADITIONS AND CUSTOMS’ CAMPAIGN

At the heart of the GNTB’s marketing, PR and social media activities in 2015 was the ‘Traditions and Customs’ campaign. Through the three pillars of ‘Culinary Germany’, ‘Living Traditions’ and ‘Arts & Crafts’, the campaign linked the modern and positive image of Destination Germany with the country’s vibrant, authentic traditions and the part they play in contemporary society. The aim was to make the Destination Germany brand more engaging. Working together with the regional marketing organisations and regional partners, the GNTB used the campaign to highlight specific

The ‘heritage and history of the region’ aspect plays a key part in Germany’s appeal and is among foreign travellers’ top ten reasons for choosing Germany as a holiday destination, according to the GNTB’s Quality Monitor survey of the German tourism industry. The ‘Traditions and Customs’ campaign in 2015 added a new area of emphasis in inbound tourism to complement the traditionally strong city breaks segment, which attracts a large share of foreign visitors. The campaign picked up on the current trend for originality and authenticity to promote the development of tourism in rural areas and thus give Germany a stronger position as a sustainable travel destination. Foreign visitors were encouraged to explore Germany’s intangible cultural heritage, to sample typical food and drink, to experience festivals, customs and cultural events in Germany’s towns, cities and regions, such as the Oktoberfest in Munich and the carnival in Cologne, and to discover art, music and crafts.

‘Traditions and Customs’ activities

The theme was communicated in all 30 markets around the world in which the GNTB is active. Forming a central part of the campaign, international blogger tours focused on ‘Culinary Germany’, ‘Living Traditions’ and ‘Arts & Crafts’: courtesy of the GNTB and its regional partners, bloggers from various markets travelled

traditions and customs. In order to feature in a campaign, the traditions and customs had to be relevant to tourism, located in places with suitable tourism facilities and meet the interests of guests from the various source markets.

Successful marketing and trade activities
13 million visits/clicks, reach of
705 million, **4.6 million** recipients

Media coverage: print articles with a reach of almost **300 million**, **17 billion** visitors per month to over 1,200 online articles and 287 TV and radio features with a reach of over **121 million**

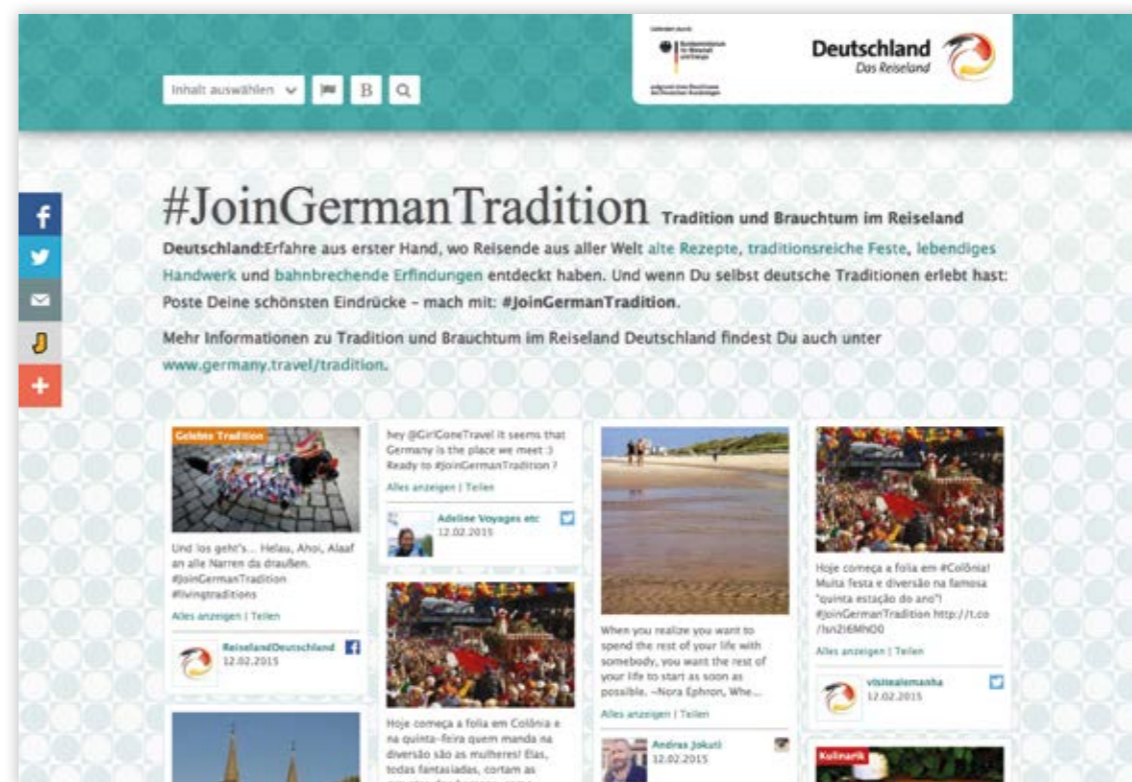
around Germany, discovering traditions and customs and documenting their experiences in words and pictures. Instagram tours also took place across the country, in which influencers made high-quality images available for the campaign. As well as live reporting on social media platforms, a social wall featured content with the hashtag #JoinGermanTradition.

Several teaser videos and a ‘Traditions and Customs’ video helped raise the campaign profile and the latest listings relating to the theme were included on the GNTB’s events database. A brochure was published in German and English profiling selected traditions and customs in all the federal states. It was also made available as an e-brochure with videos and links and it featured alongside new online content at www.germanytravel/tradition. A further web-based compo-

nent was the ‘True or False’ quiz, in which people could test their knowledge of Destination Germany. Traditional marketing and PR campaigns and social media activities also formed part of the campaign.

The ‘Traditions and Customs’ campaign enjoys great success

The success of the campaign vindicated the choice of theme: the website www.germanytravel/tradition registered over 829,000 visitors, while the section of the website on Christmas markets almost doubled its visitors to just under 732,000 compared with 2014. The 467 PR events around the world generated a potential total reach of nearly 5.4 billion; the press tours arranged for all themes generated 1,611 articles with a total reach of over three billion.



GNTB social wall for the 2015 ‘Traditions and Customs’ campaign



Award ceremony for the 2015 Scenic Routes of Germany photo competition. The award was accepted by Zhaohui Li, Head of the GNTB in China, on behalf of the winner, Dapeng He.

SCENIC ROUTES

Another key marketing theme in 2015 was the global 'Scenic routes of Germany' campaign. Around 150 scenic routes in Germany act as special tour guides, providing help and orientation that allows travellers to discover multiple regions of the country linked by a common theme. The routes not only connect selected cultural, historical and architectural places of interest, they also take visitors interested in food and drink or active pursuits to the right parts of Germany. Thanks to their themes, clear signage and specific information the routes add value to every traveller's journey.

The scenic routes are especially popular with independent travellers as they help visitors find their way around the huge variety of natural and cultural attractions in Germany. After all, according to the latest figures from IPK International, 47 per cent of all European tourists travel in their own car. And multi-destination tours are one of the key holiday types for tourism in Germany, comprising 21 per cent of the market. As well as supporting independent tourism, the GNTB's 'Scenic routes of Germany' campaign promoted tourism in the rural areas that can be explored along the various routes by car, motorbike or bicycle.

16 specially selected routes as the basis for the campaign

To provide some initial ideas, the GNTB and the federal states selected 16 of the best routes, which focused on aspects such as history, food & drink, art & crafts, architecture and nature & scenery and exemplified the diversity on offer. The campaign was launched across the markets based on this selection.



GNTB brochure promoting the '25 years since the fall of the Berlin Wall/German reunification' theme

International photo competition

The focus of the activities was an international photo competition designed to encourage opinion formers to engage with Germany's scenic routes and to create a talking point in the global media: 48 journalists from over 20 countries toured the 16 specially selected scenic routes in order to find the five most attractive aspects from the perspective of the media professional. From a total of 240 photos taken during the tours the best were chosen by online vote. The winners were presented with their awards at the 2016 Germany Travel Mart. Some of the photos of the scenic routes have already been published on the social media platforms of the GNTB, with more to follow, and are also available in the GNTB's image library.

As part of the campaign, the scenic routes page at www.germanytravel was completely relaunched, leading to an increase in visitors of over 19 per cent to more than 390,000. The GNTB's campaign was complemented by press and fact-finding tours, and the theme was also featured at press and trade events, achieving a total reach of 34 million so far.

'GERMANY REUNIFIED. 25 YEARS ON.'

In 2014 the GNTB began to focus its activities on the 25th anniversary of the fall of the Berlin Wall and the tourist attractions that have emerged over the past 25 years and today add to Germany's appeal as a travel destination. The 'Germany Reunified. 25 years on' campaign provided a current perspective on tourism events,

Successful marketing and trade activities: around **1 million** visits/clicks, reach of **140 million**, **1.2 million** recipients

developments and the results of Germany's transition since the fall of the Wall. The two-year campaign was continued in 2015, with the GNTB widening the theme to position Germany as a sustainable travel destination and promote tourism in rural areas.

Key elements were the international video blogger project 'Germany reunified' and the summer Instagram campaign '25th anniversary of the fall of the Berlin Wall'.

Blogger campaign 'Germany reunified': **19** video clips with **3 million** views

500th ANNIVERSARY OF THE BIRTH OF LUCAS CRANACH THE YOUNGER

As part of the Luther decade, which in 2015 focused on an 'Image and Message' theme, the GNTB's '500th anniversary of the birth of Lucas Cranach the Younger' campaign put the spotlight on the influential Renaissance artist, the works of father and son, and the many internationally important exhibitions and events marking the Cranach anniversary. The campaign reinforced Germany's position as the top cultural travel destination for Europeans and added another important cultural dimension to the Luther decade two years before the anniversary of the Reformation.

The GNTB also made the '500th anniversary of the birth of Lucas Cranach the Younger' theme a focus of its press events. A special press kit and the integration of all Cranach anniversary events into the GNTB's events database emphasized the theme's importance. Information on Cranach and associated events was available on the websites www.cranach2015.de and www.wege-zu-cranach.de. Over 140 press releases in print, online, TV and radio explored Cranach the Younger and his anniversary.

Two press tours on 'Cranach the Younger': reach of almost **3 million**

A TWO-PRONGED MARKETING STRATEGY FOR THE DANUBE

The Danube is a pan-European river that originates in Germany and connects up-and-coming economic areas and tourist attractions in nine countries along its almost 3,000km course. The GNTB's two-pronged strategy has two aims: to strengthen the 'German Danube' brand in its international marketing and to position the brand through a pan-European collaboration with strategic partners. Austria, Switzerland, the Netherlands, Italy and the USA have been defined as the key source

markets for towns and cities on the Danube in Germany and as high-volume markets for Germany's inbound travel industry as a whole. The Danube region countries in south-east Europe are also gaining importance as source markets for Germany's inbound tourism, with some delivering double-digit growth in overnight stays.

The variety of landscapes and the rich cultural heritage in the urban and rural regions along the Danube in Germany are at the heart of a marketing initiative launched by the GNTB in collaboration with the regional marketing organisations in Baden-Württemberg and

Bavaria, and the towns on the Danube. Under the umbrella of the 'Young Danube' brand, supply from the towns, cities and regions in terms of tourism products and services has been reconciled with demand from the key markets. Targeted marketing activities have been designed to raise the international profile of the regions and promote inbound tourism across the board. Baden-Württemberg is focusing on the Danube's significance as the 'source of Europe' where the cultural beginnings of Europe can be explored. Bavaria, meanwhile, is encouraging travellers to travel westwards and 'against the flow' to younger, more unconventional attractions along the Danube.

As part of the wider European cooperation and in support of the EU Strategy for the Danube Region (EUSDR), the GNTB works with the Steering Group Committee for the EUSDR. This is where the development of a brand for the Danube region and the development of cultural routes and sustainable tourism products along the Danube is taking shape. The GNTB is now promoting 32 German towns and cities on the Danube at www.danube.travel, the DCC's main website for the Danube nations. Video bloggers are sharing impressions of their trips on the Danube. Further incentive to visit is provided by the content and picture gallery on the Facebook page 'My Danube Travel'.



Weltenburg Abbey in the Danube Gorge

BASIC THEMES

The **core brand** of Destination Germany is shaped by the megatrends health and culture. The product lines **‘city breaks and cultural tourism’** and **‘health & fitness holidays’** are derived from these megatrends. The GNTB has defined basic themes along these product lines that are continually updated with the latest content and developed further using **market-specific campaigns** and **activities**. The GNTB’s marketing maintained its focus on **online activities**.

The basic themes promote the core of the brand and help to shape ongoing strategic marketing. By monitoring global trends and using analyses and assessments of the market, the GNTB defines themes that also form the basis for customer-focused product advice and design. These products are promoted globally together with partners from business and tourism as part of the GNTB’s multiplier strategy. The information gleaned from marketing is, in turn, incorporated into market analysis.

The GNTB’s international marketing activities are tailored to the respective market and implemented using a wide range of marketing tools for the three defined target groups: consumers, the travel trade and the media. Online activities remained the focus of the GNTB’s marketing.

CITY BREAKS AND CULTURAL TOURISM

In 2015 Germany was ranked in fourth place for its image as a cultural destination among the 50 countries that are included in the Anholt-GfK Roper Nation Brands Index. It has thereby consolidated its position as the number one cultural travel destination for Europeans. City breaks are by far the most popular travel segment for holidaymakers visiting Germany with a market share

Almost **19 million** views for the ‘Cities’ and ‘Romantic Germany’ video clips

of 33 per cent, followed by multi-destination tours with 21 per cent. These percentages are well above the average for Europe as a whole, where city breaks and multi-destination tours have a 23 per cent and 16 per cent share of the market respectively.

This trend was reflected in Germany’s ten Magic Cities in 2015, which accounted for 27 per cent of overnight stays by international visitors. Almost all Magic Cities saw higher growth than the average for Germany as a whole. Overall, the major urban centres (Magic Cities plus Berlin) attract 44 per cent of German inbound tourism.

Over **500,000** page views for the UNESCO World Heritage webpages

BASIC THEMES FOR PROMOTING THE CORE DESTINATION GERMANY BRAND



HEALTH & FITNESS HOLIDAYS

International visitors particularly appreciate the beautiful scenery and nature that can be found in Germany. The latest results from the GNTB’s Quality Monitor survey of the German tourism industry show that 39 per cent of them select their holiday destination on the basis of the local places of interest, while nature and the countryside are the deciding factor for a further 37 per cent. Germany is impressively placed as a destination for nature holidays: 11 per cent of all European nature holidays – including holidays in the countryside and in the mountains – take place in Germany according to IPK. It is therefore ranked third behind Austria and France and ahead of Italy and Spain.

Germany’s rural regions are a popular holiday destination with visitors from neighbouring countries in particular. Almost a third of international holidaymakers in rural regions come from the Netherlands. The next biggest source markets for this segment are Switzerland, Belgium, Denmark, Austria, France and the UK. Overall, municipalities with a population of less than 10,000 now account for more than one in five overnight stays.

In 2015 the GNTB continued to expand its website www.germany.travel, which is its primary medium for

promoting specific travel products to consumers. Various social media platforms are extending the themes’ reach, enabling engagement with particular target groups on the specific themes and, at the same time, creating plenty of opportunities for interaction. Accompanying themed print publications in various languages are adapted for the relevant markets and are supported by advertisements in selected traditional media. Promotional activities are also an integral part of the marketing portfolio aimed at consumers around the world.

Reach of just under **800,000** in print and over **1.2 million** unique visitors online for the themes active holidays, wellness & Germany’s islands

The key promotional tools for each theme were thoroughly revised last year in order to ensure the consistency and quality of the communication in 2015. Multi-page spreads, online banners and rollup screens were redesigned and 13 video clips were produced that are being used in a variety of different ways to complement the multimedia content for the basic themes.

INNOVATIONS MANAGEMENT

The **competitiveness** of destinations today is closely tied to how they prepare for the future. This involves identifying **long-term trends**, working out what the specific **challenges** will be and finding feasible solutions. The GNTB's innovations management team systematically **analyses** trends, **develops** specific products and **integrates them into the core brand** of Destination Germany.

Core themes include the increasing consumer awareness of sustainability and social responsibility as well as the ability for everyone to participate in society.

SUSTAINABLE TOURISM

Towns and cities, destination management organisations in rural regions and tourism providers along the service chain are paying more and more attention to sustainability in their strategic planning. The GNTB is supporting this trend by promoting Germany as a destination for sustainable tourism and is helping to develop this element of the core brand in a credible way.

The GNTB systematically implements the sustainability theme in three areas:

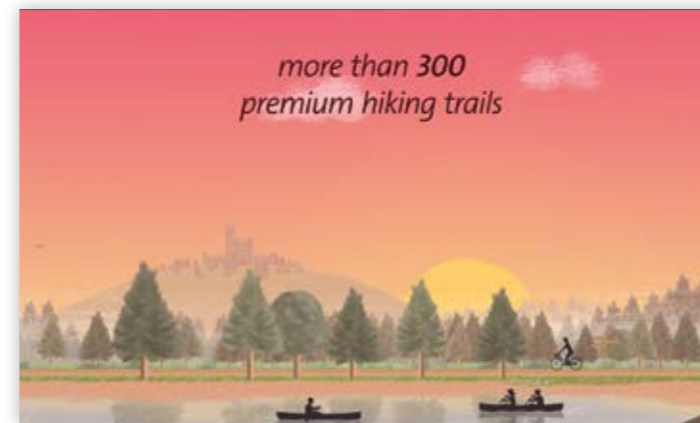
- consistent integration of the aspect of sustainability into the global marketing for Destination Germany.
- internal sustainability initiative: the GNTB acts as a role model.
- expertise in implementing the theme in the industry: collaboration in partner's activities and specialised integration.

Sustainability as an overarching theme is viewed by many tourism sectors as an element of the overall package, for example in the areas of transport, city breaks, MICE and active holidays.

KEY ACTIVITIES IN 2014/15

1. External communication / global marketing

- Integration of the sustainability aspect into the design of the 'Traditions and Customs' campaign in 2015 and preparations for the 'Holidays in the heart of nature in Germany' campaign in 2016.
- Pre-convention tour for the 2015 GTM 'Nature and sustainable travel', 22 – 25 April 2015, with international travel journalists and sales managers from the travel industry.
- Support provided for the Green Map of Germany project, which showcases certified sustainable tourism establishments in a clean and uncluttered way.
- Visit to the UNWTO in Madrid to present sustainable products and projects that promote sustainable tourism in Germany.
- 'Sustainable Tourism' fact-finding tour as part of the cooperation with Brazilian tour operator BRAZTOA. Destinations: Berlin and Dresden as well as surrounding areas.
- Creation of an explanatory film 'Sustainable travel in Germany'.



The GNTB explanatory film on sustainable travel in Germany

2. Internal sustainability initiative

- Creation of a sustainability guide for GNTB employees.
- Delivery of the 2016 GTM as a green meeting as part of a concerted effort to run the largest inbound tourism event for Destination Germany in a sustainable and socially responsible way.
- Extension of Green Globe certification: the Green Globe Certification standard was the first certification specifically developed for the global travel industry.
- Certified as an 'ECOPROFIT organisation in Frankfurt' in 2015. ECOPROFIT (ECOLOGICAL PROJECT FOR INTEGRATED ENVIRONMENTAL TECHNOLOGY) is a cooperation between local authorities and local organisations. So far, there are 95 ECOPROFIT organisations based in 95 municipalities across Germany. The project is running in 17 countries worldwide.



Germany Travel Mart as a green event: transfers on public transport at the 2016 GTM in Magdeburg

3. Expertise in product development

- The GNTB was a member of the committee for the German Tourism Association (GTA) project 'Criteria development for sustainable tourist destinations'. The aim was to offer tourism regions practical resources for their progress towards sustainability and to provide a platform for the first nationwide recommendations for the development of sustainable tourism regions. The guide 'Practical guidelines for sustainability in the German travel industry' was published in spring 2016.
- Participation in the planning of the alpine conference 'Sustainable tourism in the Alps: a challenge (without an alternative)' on 8 June 2016 at the Allgäu Stern Hotel in Sonthofen.
- Delivery of a sustainability workshop in the GNTB for sharing information with the regional marketing organisations.
- Membership of the GTA's expert committee on transport.
- Membership of the GTA's expert committee on sustainability.
- GNTB innovations management team represented on the panel of judges for the GTA's German Tourism Award.
- GNTB innovations management team represented on the panel of judges for the competition 'A future for tourism! Award for Sustainability in Lower Saxony'.
- Membership on the advisory committee for the project 'The Destination as the stage: how does cultural tourism bring success to rural areas?'

BARRIER-FREE TRAVEL TO AND WITHIN GERMANY

The demographic shift is changing the age structure of travellers in traditional markets and thereby also the requirements of tourism in these places. This goes hand in hand with the issue of accessibility and the ever greater recognition of inclusivity as a service feature and quality criterion.

The topics 'Barrier-free travel', 'Tourism for all' and 'Inclusivity' have become a firm fixture on the agendas of numerous tourism providers. The goal of an inclusive society offers both challenges (technical, structural, HR-related) as well as considerable commercial potential.

The number of barrier-free products and services is growing accordingly, and accessibility has also become a quality standard that many providers aspire to for their own services. This has led to better quality management and better cooperation between the stakeholders.

The GNTB supports the development and marketing of barrier-free tourism through national and international projects and partnerships.

BMW project 'Tourism for all'

This project developed a uniform certification system for barrier-free tourism in Germany that is based on thorough checks and the training of the service providers. The GNTB is actively involved in the advisory committee and promotes the certification at home and abroad at every opportunity. During the ongoing second phase of the project a nationwide database will be established to facilitate access to detailed and targeted information on barrier-free products and services. (www.reisen-fuer-alle.de)

GERMAN-BRAZILIAN COOPERATION PROJECT

- Opening event on 30 September 2015 in Berlin: 'On your mark, get set, go: Brazil and Germany – partners in inclusivity and at the Paralympics'
- Presentation of the current status in the areas of transport, education, employment, culture and sport in Germany and Brazil
- Presentation of opportunities, possibilities and requirements
- Production of a manual on inclusivity in German and Portuguese
- Information event on barrier-free travel in Germany for tour operators and journalists in São Paulo in 2016
- Highlight: joint event at the German House during the Paralympic Games on 15 September 2016 in Rio de Janeiro

The 'Enjoy with ease' project

An important step in the marketing of accessible travel was the nationwide pooling of barrier-free products and services in the project 'Enjoy with ease'. The GNTB publication 'Welcome to BarrierFree Germany. Enjoy with ease' featured highlights in barrier-free tourism in German towns, cities and rural areas and was published in German and English to coincide with the 2015 ITB. It was produced as a brochure, including publication online as an accessible PDF and online content on www.germany.travel/barrierfree, and has been distributed in Germany and around the world by the GNTB and its partners.

The project was run in close cooperation with the Association of Barrier-free Destinations in Germany, the National Coordination Board Tourism for All (NatKo) and the Tourism for All working group of the German federal states.



'Barrier-free Travel' pre-convention tour for the 2016 GTM



Interview with Parliamentary State Secretary Iris Gleicke. The Federal Government Commissioner for SMEs, Tourism and the New Federal States attaches great importance to the integration of key players in order to create new barrier-free products and services

BARRIER-FREE TOURISM DAY AT THE 2016 ITB

At the fifth Barrier-free Tourism Day, the GNTB and its strategic partner, the National Coordination Board Tourism for All (NatKo), welcomed approximately 200 attendees – a new record – including representatives from politics and the international tourism industry as well as experts and journalists. The event was organised by the GNTB and NatKo on behalf of the German Bundestag and with the financial backing of the Federal Ministry for Economic Affairs and Energy (BMW) as part of the 2016 ITB congress. Key points on the agenda this year were 'Barrier-free solutions in cultural and city travel' and 'Practical solutions along the tourism service chain'.

Iris Gleicke, Parliamentary State Secretary at the BMW and Federal Government Commissioner for SMEs, Tourism and the New Federal States, used her speech to highlight the importance of the event to the integration of all stakeholders in the creation of new barrier-free products and services. According to Gleicke, the nationwide certification and information scheme 'Travel for All', developed by the German Seminar for Tourism (DSFT) in partnership with NatKo and funded by the BMW, is an important element in creating a reliable service chain.

Keynote speaker Michael Müller, HR director and member of the board at Fraport AG, showcased Frankfurt airport's initiatives for travellers with disabilities.

Experts from politics, associations and regional marketing organisations analysed the progress that has been made so far and defined areas for further action during the panel discussions and presentations that followed. One of the issues under discussion was the draft amendment of the Equality Act (Gleichstellungsgesetz). Panel members included Verena Bentele, Federal Government Commissioner for Matters Relating to Disabled Persons; Francesc Aragall, President of the Design for All Foundation; the managing director of the regional marketing organisation of North Rhine-Westphalia, Dr Heike Döll-König, and of Lower Saxony, Carolin Ruh; Anja Schaluschke, managing director of the German Museums Association; and Dr Rüdiger Leidner, CEO of NatKo.

The event was supported by the Association of Barrier-free Destinations in Germany, the Tourism for All working group of the German federal states and Messe Berlin.

OUTLOOK

Distinctive themes and **authenticity** are becoming ever more important in the global travel market. That is why the GNTB's **theme-based campaigns** focus on **tourism offerings** that travellers will only find in Germany, and on **events** and **occasions** that are inextricably linked with our country.



OUTLOOK FOR 2016

HOLIDAYS IN THE HEART OF NATURE IN GERMANY: #EnjoyGermanNature

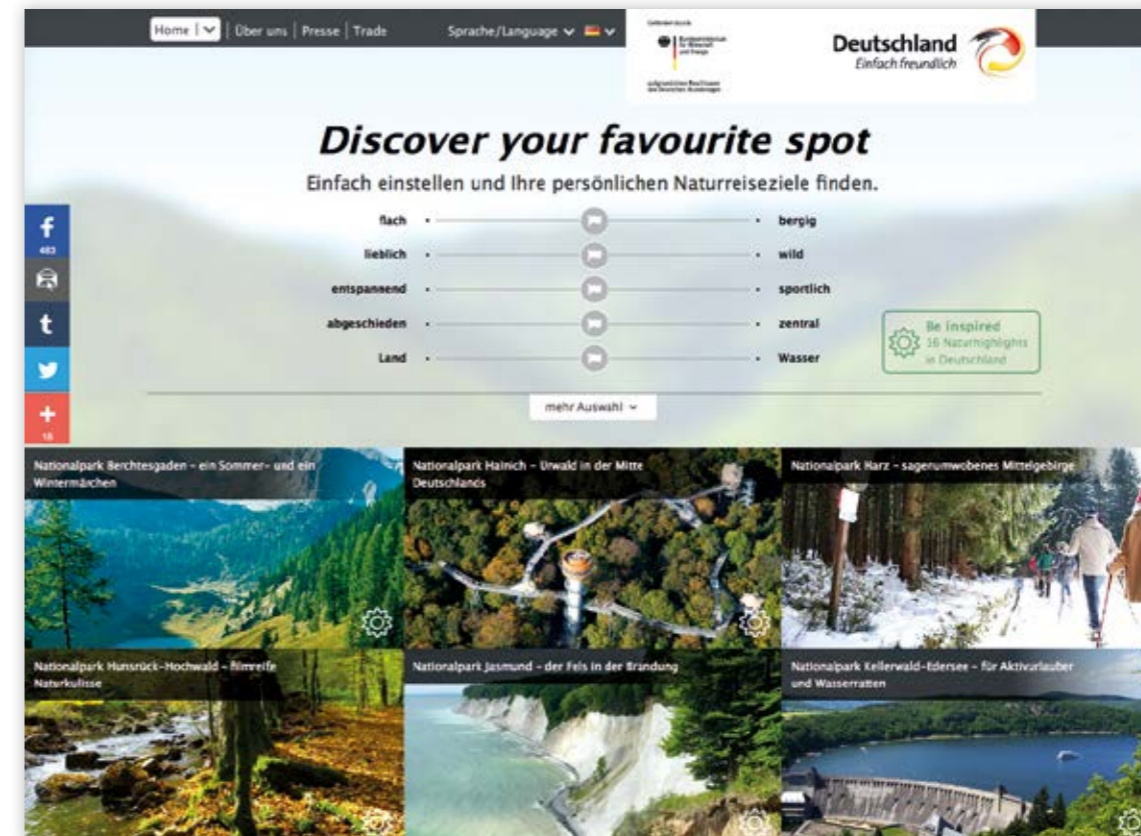
With the 'Holidays in the heart of nature in Germany' campaign in 2016 the GNTB is focusing its sales and marketing activities on the more than 130 protected natural landscapes in Germany – 16 national parks, 15 UNESCO biosphere reserves and over 100 nature parks.

Germany, alongside Austria and France, is already one of the world's most popular destinations for nature-loving European travellers, with 2.6 million Europeans visiting Germany for a holiday in the great outdoors in 2015. In the GNTB's Quality Monitor survey of the German

tourism industry, 37 per cent of international holidaymakers cited landscape and scenery as an important factor in their choice of travel destination. We are able to offer them an attractive and diverse range of tourist activities.

More than one third of Germany's land area is under special protection within national parks or nature parks. The GNTB aims to harness this responsible and uncompromising approach to nature to reinforce Germany's status as a sustainable travel destination and to further promote holidays in rural regions.

With around 30 upland regions, over 350 islands, and woodland covering one third of the land area, Germany offers a broad range of options for exploring nature and



'Discover your favourite spot' locator on www.germany.travel/enjoy

the outdoors. On 200,000 kilometres of marked walking trails, including 500 premium trails and more than 100 quality-certified trails, as well as over 200 long-distance cycle routes covering 70,000 kilometres, visitors to Germany can enjoy a sustainable holiday in the heart of nature.

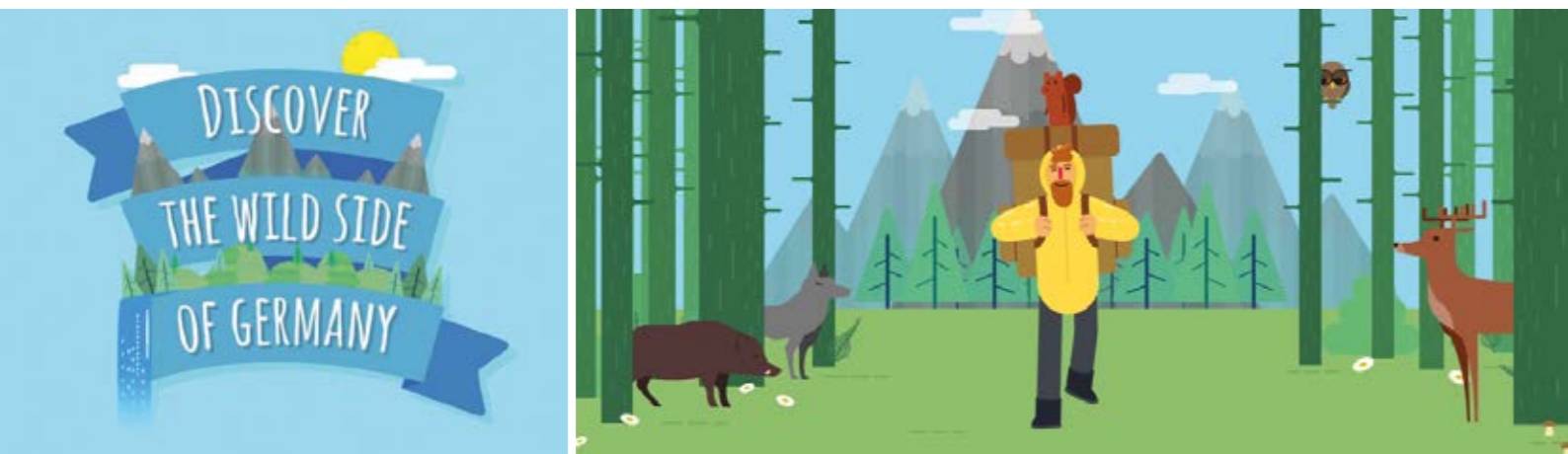
'Holidays in the heart of nature in Germany' is an online campaign that mainly focuses on digital forms of communication. The two core messages, 'Stories of discovering your favourite spot' and 'Stories of experiencing German nature', and possible activities are being continually retold in different variations and from different points of view. To match this the two core elements of the global campaign are 'Discover your favourite spot' and #EnjoyGermanNature.

They are built around expanded content relating to the subject of nature at www.germany.travel/nature. An interactive map, along with detailed content in various languages, showcases the diversity of Germany's natural landscapes. The GNTB has also created a new viral element, the destination finder (www.germany.travel/enjoy). Using a range of filter

functions, this tool allows users to explore the tourist profiles of Germany's protected landscapes in a fun way, find their own personal favourites online and share them with their friends on social media. A campaign video (www.youtube.com/germany-tourism) illustrates the activities on offer in German natural landscapes that are less well known internationally, such as trekking, climbing, paragliding and hanggliding, touring on the water, wildlife watching and walks on the coastal mudflats.

#EnjoyGermanNature in
3,874 posts on Twitter and Instagram
23,329,186 impressions/views
 (as at 12 May 2016)

Influencer trips, where particular travellers (bloggers, Instagrammers) describe their search for new favourite locations and the adventures they have there, provide user-generated content. This content is posted with the



Campaign video 'Holidays in the heart of nature in Germany'

campaign hashtag (#EnjoyGermanNature) and collated in a dedicated social media feed at www.german.travel/enjoygermannature. The GNTB campaign also employs eye-catching online banners featuring moving images that depict scenic landscapes.

The core markets for the campaign are the Netherlands, the UK, Belgium, Switzerland, France, Italy, Spain, Austria, the Czech Republic, Poland, Denmark and Sweden. In its implementation of the campaign, the GNTB is cooperating closely with its partners at EUROPARC Germany – the umbrella association of Germany's protected landscapes, and the Association of German Nature Parks, as well as the regional marketing organisations.

'Holidays in the heart of nature in Germany':
reach of **24 million** so far, **2 million**
likes, shares and comments on Facebook.
(as at 12 May 2016)

800 YEARS OF THE KREUZCHOR BOYS' CHOIR: KNOWN THE WORLD OVER – AT HOME IN DRESDEN

One of Germany's most important cultural institutions is celebrating a major anniversary in 2016. For 800 years, the Dresden Kreuzchor boys' choir has played a key part in establishing Dresden's reputation as a European city of culture and Germany's as a land of music. The GNTB is using the anniversary as an opportunity to promote this particular aspect of Destination Germany with a theme-based campaign in order to strengthen Germany's position as a cultural travel destination.

Dresden's range of cultural attractions reinforces Germany's position as the number one cultural destination for Europeans. Its volume of overnight stays by visitors from abroad has risen every year since 2006, and by more than 80 per cent overall, to reach 880,000. This makes Dresden one of the ten most popular city destinations in Germany,

Renowned as a city of music, Dresden, Saxony's capital and former seat of the Electors of Saxony, is home

to internationally acclaimed orchestras, such as the Dresden State Orchestra and the Dresden Philharmonic, and presents a vibrant programme of music theatre at the Semper Opera House. The city's prestigious boys' choirs keep alive a centuries-old tradition of church music that covers everything from Heinrich Schütz to modern-day compositions. The three most important boys' choirs in Saxony, the Kreuzchor boys' choir, St Thomas choir in Leipzig and the boys' choir of Dresden Cathedral are included in the first 27 examples of traditions, knowledge and practices registered in the new Nationwide Inventory of Intangible Cultural Heritage in March 2015, in accordance with the UNESCO convention.

OUTLOOK FOR 2017

LUTHER 2017 – 500th ANNIVERSARY OF THE REFORMATION IN GERMANY

In 2017 the GNTB will be placing the Reformation's anniversary as the highlight of the Luther decade at the centre of its worldwide marketing activities.

The strategy for the positioning of the anniversary will focus on Martin Luther as the symbolic figure of the Reformation and as a brand ambassador for Germany. The GNTB's aim is to strengthen Germany's reputation as a cultural destination within the international travel market and to use the anniversary to present a modern image of Germany.

National exhibition:
The Luther Effect.
500 years since the Reformation
German Historical Museum
Berlin, 12 April – 5 November 2017

The strategic approach to the long-term marketing of the Reformation anniversary for inbound tourism to Germany is based on two pillars.

- The Reformation represents a milestone in European cultural history. The people and places



Parliamentary State Secretary Iris Gleicke with Playmobil figure of Martin Luther as ambassador for the GNTB campaign 'Luther 2017 – 500 years since the Reformation in Germany'

associated with the Reformation are cultural treasures that are recognised all over the world and therefore eminently suitable for promoting cultural travel to Germany in overseas markets. According to IPK International, Destination Germany was the most popular cultural travel destination for Europeans in 2015. And the Quality Monitor survey of the German tourism industry (May 2011 to April 2014) showed that nearly a third of international visitors chose Germany because of its diverse arts and culture scene.

- There are around 72.3 million Lutherans worldwide (source: Lutheran World Information 2014). The GNTB will be promoting the Spiritual Travel segment for the anniversary and will target not only culturally minded travellers to Germany, but also religiously motivated travellers in the international source markets.

Historical figures such as Martin Luther, the theological founder of the Reformation, and the Reformation's anniversary in 2017 are ideally suited to focusing international attention towards Destination Germany as part of the megatrend of culture. The GNTB is using them in its Luther-themed activities to add new dimensions to cultural tourism and provide travel incentives for international visitors.

From a tourism perspective, the most relevant source markets include Scandinavia and the USA, which have approximately 18.8 million and four million Lutherans respectively. The GNTB has identified ten key markets for this theme:

- Europe: Netherlands, Denmark, Sweden, Norway, Finland, Switzerland, Hungary
- Overseas: USA, Canada and South Korea.

These countries have both an active connection to the Reformation's legacy and are important or growing source markets for Destination Germany.

The GNTB is working closely with strong partners to establish this theme in these source markets. Partners include the Luther 2017 coordinating office, the Evangelical Church in Germany (EKD), the tourism organisations of the federal states and the main towns and cities in Germany with historical links to Luther.

Cross-border, multimedia activities promoting the key Martin Luther themes

Throughout the Luther decade the Reformation theme has featured prominently on the GNTB website www.germany.travel. The multilingual website provides information on important locations in the Reformer's life,

National exhibition:
Luther!
95 people – 95 treasures
Lutherstadt Wittenberg/Luther's House
13 May – 5 November 2017

such as the three official Luther towns of Wittenberg, Eisleben and Mansfeld, the famous Wartburg Castle in Eisenach and destinations such as Torgau, Schmalkalden, Erfurt, Augsburg, Coburg, Worms and Heidelberg, as part of the Spiritual Travel segment. Culturally minded users can retrace important waypoints in Luther's life in Saxony, Saxony-Anhalt, Thuringia, Bavaria and Rhineland-Palatinate on a clearly laid out interactive map. Another way to follow in the footsteps of the great reformer is the Luther Trail. This walking and pilgrim trail extends for more than 2,000 kilometres through Saxony-Anhalt, Thuringia, Saxony, Hessen and Bavaria.

The GNTB website also features eight Luther routes that connect important locations in the Reformer's life and of the Reformation itself.

Over 50 fact-finding tours for the press and trade have already been organised by the GNTB to provide information on the most relevant tourism locations. The campaign is being continued on social networks such as Facebook and Twitter with a focus on specific markets and target groups.

Together with the Swiss tourist board, the GNTB has developed a cross-border route entitled 'On the trail of Luther, Zwingli and Calvin' with which to market the theme in the US market.

Luther events across Germany

During the Luther decade, people interested in historical themes can experience Luther and the Reformation in all kinds of ways. From lectures, conferences and workshops to concerts, musicals, exhibitions and readings, there is a multitude of possibilities for the culturally minded to engage with these themes from different perspectives. The predominant focus is on four national exhibitions: the special exhibition at Hartenfels Palace

in Torgau is the first in a Reformation anniversary series that will continue right into 2017 at Wartburg Castle near Eisenach, in Wittenberg and in Berlin. Details of more events covering a wide range of genres and comprehensive information can be found at www.luther2017.de.

Long-term commitment

The Luther decade (2008 – 2017) has explored and continues to explore the many different facets of Luther's life and work. The GNTB has been heavily promoting this theme since the Luther decade began in 2008: the 800th anniversary of St Thomas' choir in 2012, for example, was highlighted internationally in line with the 'Reformation and Music' theme. 'Image and Bible', the focal point for 2015, was accompanied by a wide range of activities celebrating the 500th anniversary of the birth of Lucas Cranach the Younger.

National exhibition:
Luther and the Germans
Wartburg Castle, Eisenach
4 May – 5 November 2017

14th DOCUMENTA

More than a third of all foreign visitors list going to see exhibitions and museums among their top ten activities when travelling to Germany (source: GNTB Quality Monitor survey of the German tourism industry).

The documenta, one of the foremost exhibitions of modern and contemporary art, will be taking place for the 14th time in 2017. Since its inception, the exhibition known as the 'museum of a hundred days' due to its length has grown continually, and attracted more visitors every time. In 1955 around 130,000 people travelled to the city of Kassel in northern Hessen to see 670 works by 148 artists. At documenta 13 in 2012 more than 860,000 people enjoyed exhibits, installations, lectures and performances by over 300 participants. More than a quarter of the visitors who came to see this remarkable retrospective were from abroad.



'News about Luther 2017' – GNTB workshop in preparation of 'Luther 2017 – 500 years since the Reformation' at the 2016 GTM in Magdeburg

There will be an important change in 2017, as the documenta takes place at two locations. Adopting the theme 'Learning from Athens', it will be held in the Greek capital from 8 April to 16 July, and in its traditional location in Kassel from 10 June to 17 September. The GNTB will be promoting this important art event through a range of marketing and PR activities in relevant markets.

documenta 14
Athen/Aθήνα 8. 4.–16. 7. 2017
Kassel/Κάσσελ 10. 6.–17. 9. 2017

2017 IGA BERLIN

The Federal Horticultural Exhibition (BUGA), held every two years, and the International Garden Show (IGA), held every ten years, are both public festival and horticultural showcase rolled into one. The exhibition spaces created for these events provide a lasting legacy for communities in the form of sustainable green spaces and areas for leisure activities, relaxation and play, all of which help to enhance the urban environment and the lives of local people.

In 2017 the IGA will be held in Berlin. The capital is expecting two million visitors from Germany and across Europe for the country's biggest festival of horticulture. The exhibition space will see a doubling of the area currently occupied by the internationally acclaimed Gardens of the World in Berlin-Marzahn, and it will also include

parts of the Wuhle valley as well as Mount Kienberg. Visitors to the IGA can look forward to an exciting programme of activities and spectacular views of Berlin.

Berlin is by far the most popular city destination in Germany, with around 13 million overnight stays by foreign visitors in 2015. In addition to the better-known attractions, people visiting the capital can also expect expanses of water and woodland. An impressive 6,500 hectares – 7 per cent of the total metropolitan area – belong to the Natura 2000 network of European conservation areas. The IGA will be used to highlight facets of the greenest capital in Europe beyond the usual cultural hotspots.



OTHER THEME-BASED CAMPAIGNS AT A GLANCE

2018 Culinary Germany

2019 100 years of the Bauhaus
200th anniversary of the birth of Theodor Fontane

2020 250th anniversary of Beethoven's birth
Passion Plays in Oberammergau

Inbound tourism from a regional perspective

Over the next few pages, the managing directors of the regional marketing organisations sum up their **results** for **inbound tourism in 2015**, their **expectations** and **forecasts** for the near future, and the current **trends** in the travel and spending patterns of international tourists.

Andreas Braun, Baden-Württemberg We are delighted to report record figures in tourism for the fifth consecutive year in Baden-Württemberg. We made two important breakthroughs in 2015: visitor arrivals passed the 20 million mark for the first time, and the number of overnight stays exceeded the magic number of 50 million. Once again, international source markets were the primary driver of growth. There was another big increase in the number of overnight stays by foreign visitors, with the figure going up by nearly 8 per cent to reach 11.1 million. This represents almost 22 per cent of all overnight stays in Baden-Württemberg. It is particularly encouraging to see that all the regions here in the south are benefiting from this boom in inbound tourism.

In view of all the uncertainties in world affairs, we expect only a steady rise in the volume of international visitors in 2016. That said, we are optimistic about the strong increase in demand from the overseas markets, and the fact that Baden-Württemberg is becoming increasingly popular as a holiday destination for our direct neighbours. More than a third of all international visitors who stay in Baden-Württemberg now come from Switzerland or France.

We have known for some time that independently organised travel is a growing trend among visitors from our European source markets, but it is also becoming ever more popular among visitors from countries that are further afield. Travellers are gathering a vast amount

of information about suitable destinations before their trip and putting together their own itineraries. In Baden-Württemberg this is benefiting not only the towns and cities but also the rural regions.

Jens Huwald and Dr Martin Spantig, Bavaria

In 2015 the Free State of Bavaria reported record figures for the fourth year running with 34.2 million arrivals (up by 5.4 per cent) and 88.1 million overnight stays (up by 3.4 per cent). All four regions promoted by our tourism association shared in this success. The percentage growth in Bavaria was above average when compared with Germany as a whole, where overnight stays were up by 2.9 per cent. In absolute terms, Bavaria recorded 2.9 million more overnight stays than in 2014. Demand from abroad continues to be a driver for the positive results in Bavaria. The number of overnight stays from outside Germany rose by 6.0 per cent overall to reach 17.6 million. We saw increases in the number of arrivals from China (up by 28.4 per cent), the USA (up by 11.1 per cent) and Switzerland (an increase of 8.2 per cent). Bavaria is still Germany's number one travel destination in terms of the volume of overnight stays, accounting for 20 per cent of the market. Going forward, we anticipate further increases in the number of international visitors and are stepping up our international marketing activities accordingly. One new development has been the establishment of our own representative office in China, which has been up and running since the beginning of the year.

Burkhard Kieker, Berlin Berlin set a new record in 2015 with 30 million overnight stays. Interest in Germany's capital shows no sign of waning and Berlin remains the driving force for Germany's city breaks sector.

German visitors accounted for the highest proportion of overnight stays at just under 55 per cent. But the number of visitors from abroad is rising all the time. More than two thirds of overnight stays by international visitors are attributable to Europeans, most of whom come from the UK (1.5 million). Right behind them is the USA, whose tally of more than 1 million overnight stays makes this Berlin's largest intercontinental market.

Many people who come to Berlin are return visitors. Because they are now familiar with the most famous sights, they are increasingly looking to see the city through the eyes of the locals. With this in mind, we have developed our 'Going Local' app. It provides personal recommendations from Berlin experts, which give visitors new ideas and help them to discover the city from a new perspective.

partners with an international focus, such as Tropical Islands and Novasol, continue to invest, and the publicity that Brandenburg has gained from bidding to host the Ryder Cup golf tournament also gives us optimism that our target can be achieved. We are also continuing to focus on day trips, an important market for Brandenburg. The boom in Berlin, for example, has had a knock-on effect on the number of day-trippers in Potsdam.

Peter Siemering, Bremen The federal state of Bremen registered another set of record results for tourism in 2015. Arrivals were up by 4.5 per cent (1,257,804) and the number of overnight stays increased by 3.8 per cent (2,374,748). The top three international source markets were the Netherlands, the UK and Spain. Some 17,100 people now work in the hospitality sector in the federal state of Bremen. That is 25 per cent more than eleven years ago.

We also anticipate positive results for Bremen in the current year. Our Hanseatic city hosts major exhibitions that draw in the crowds, such as 'Max Liebermann'



Andreas Braun Managing Director of Tourismus Marketing GmbH Baden-Württemberg
Dr Martin Spantig, Managing Director of Bayern Tourismus Marketing GmbH
Jens Huwald, Managing Director of Bayern Tourismus Marketing GmbH
Burkhard Kieker Managing Director of visitBerlin
Dieter Hütte Managing Director of Tourismus-Marketing Brandenburg GmbH

Dieter Hütte, Brandenburg 2015 was another record year for tourism in Brandenburg with 12.5 million overnight stays – that's an increase of nearly 5 per cent. We even saw a 5.3 per cent rise in the number of overnight stays by international visitors. The Federal Horticultural Show in the Havel region played a part in this positive trend, with the event featuring in brochures of international tour operators and in the international media. Because of current political and economic developments, the situation in our most important international source market, Poland, has regrettably become more difficult. Nonetheless, we aim to reach one million overnight stays by international visitors in 2016. Strong

at the Kunsthalle and 'America' at the Ethnological Museum. The tall ship Alexander von Humboldt brings tourists to St Martin's quay, and the new Valentin U-boat pen memorial site leaves a lasting impression on those who visit.

Bremerhaven also stages major events, some of which are new, so there are always plenty of reasons to visit. The SeeStadtFest maritime festival and the Schippertage sailing festival are two examples. In the medium term, we are striving to increase the number of international visitors to Bremerhaven by 2 per cent.

Michael Otremba, Hamburg Hamburg has established itself as one of the most popular destinations for city breaks in Europe. In 2015 we recorded a total of 6.3 million visitors and 12.6 million overnight stays, a year-on-year increase of 5.3 per cent. The room occupancy rate in the hotel sector was 78.3 per cent on average during the year, which puts Hamburg on a par with London and Paris.

There has been a sharp uptrend in growth from our international source markets. The number of overnight stays from abroad rose by 5.9 per cent last year and now stands at 3.1 million.

International demand was again the driver of growth in the tourism sector, delivering a year-on-year increase of 6.3 per cent. The USA is still the most important international source market by far, accounting for almost 800,000 overnight stays, followed by the Netherlands (572,402) and the UK (500,247).

China could overtake the UK this year, as the number of overnight stays by Chinese visitors increased by 36.8 per cent to reach nearly half a million. We are also observing a growing trend towards individualisation from China, which offers an opportunity to draw attention to places off the tourist trail in the medium term.

Switzerland with new stops in the Mecklenburg Lakes and on the Baltic coast. We are also involved in the GNTB's 'nature' campaign in the international source markets that are relevant for us. This is an opportunity to highlight, in particular, the potential for active holidays and nature-based holidays in our region.

Carolin Ruh, Lower Saxony The Lower Saxony region set a new record in 2015 with 3.6 million overnight stays by international visitors, a year-on-year increase of 2.7 per cent. More than 80 per cent of these visitors came from Europe. Inbound tourism is focused on a number of key destinations in the region, such as Hannover, which is an important location for international trade fairs.

has risen by around 15 per cent since 2011, whereas the number of overnight stays by German visitors has increased by only 9 per cent. International visitors accounted for 10.1 million overnight stays last year, which is the highest figure yet.

We expect our new international marketing project to provide a further boost for inbound tourism. We will be stepping up our efforts in our main source markets of the Netherlands, the UK and Belgium but also in the high-potential market of Poland. North Rhine-Westphalia is already the most popular destination in Germany for the Dutch, and, unlike other parts of Germany, it is our winter holidays in particular that



Peter Siemering
Managing Director of Bremer Touristik-Zentrale, Gesellschaft für Marketing und Service mbH

Michael Otremba
Managing Director of Hamburg Tourismus GmbH

Herbert Lang, Head of Tourism and Conference Marketing, HA Hessen Agentur GmbH
Folke Mühlhölzer, Chief Executive Officer of HA Hessen Agentur GmbH

Bernd Fischer
Managing Director of Tourismusverband Mecklenburg-Vorpommern e.V.

To develop sustainable tourism, Hamburg Tourismus GmbH is launching more and more projects that aim to strike a balance between economic growth, quality of life and community acceptance. We are therefore creating an authentic basis on which to welcome visitors from Germany and abroad. In our international marketing campaigns, we are increasingly highlighting themes that enhance our quality profile. We want to appeal as much to members of Generation Y as we do to travellers seeking luxury and individuality.

Folke Mühlhölzer and Herbert Lang, Hessen Hessen is going from strength to strength as a travel destination. In 2015 we registered more than 32 million overnight stays for the first time, an increase of 3.2 per cent on the prior year. In 2016 we expect steady demand from Germany and abroad. It is the larger cities and conurbations that are benefiting most from this trend, but the rural regions also have great tourism potential that is by no means exhausted. We are therefore helping our destinations to develop a unique tourism profile.

We expect the next documenta art exhibition to give us a considerable boost in 2017, particularly in terms of international visitors.

Bernd Fischer, Mecklenburg-Western Pomerania Mecklenburg-Western Pomerania may still have some catching up to do – but more and more international visitors are discovering the north-east of Germany and, as a result, 2015 was our most successful year ever for inbound tourism. Focusing on particular themes in our nationwide marketing activities has clearly paid off. In Switzerland, Austria, Sweden, Denmark and the Netherlands, we are promoting tourism in Mecklenburg-Western Pomerania in close cooperation with the German National Tourist Board, tour operators, transport operators and key players from the region. We expect a further rise in the number of overnight stays in 2016. This will be helped by new direct flights from Linz and Basel to Rostock-Laage Airport and from Zurich, Bern and Basel to Usedom, as well as by the extended rail services on the City Night Line from



Carolin Ruh
Managing Director of Tourismus Marketing Niedersachsen GmbH

Dr Heike Döll-König
Managing Director of Tourismus NRW e.V.

Stefan Zindler
Managing Director of Rheinland-Pfalz Tourismus GmbH

Birgit Grauvogel
Managing Director of Tourismus Zentrale Saarland GmbH

Domestic tourism continues to dominate in Lower Saxony, accounting for around 90 per cent of the market. However, we see opportunities for growth in our source markets outside Germany, and so we are launching initiatives in 2016 to find new partners to collaborate with on international marketing campaigns. A practical guide ('How to do international marketing') has been developed for this, which has been specially designed to assist service providers in Lower Saxony.

We are looking to run long-term campaigns aimed at winning back visitors from declining markets such as the Netherlands and inspiring them to choose Lower Saxony as a holiday destination in years to come. Other key issues here are accessible tourism and the sustainability of our natural landscapes.

Dr Heike Döll-König, North Rhine-Westphalia Inbound tourism has become an engine of growth for North Rhine-Westphalia over the past few years. The number of overnight stays by visitors from abroad

attract our neighbours. Shopping and events-related travel in North Rhine-Westphalia are also very popular among the Dutch.

Stefan Zindler, Rhineland-Palatinate In 2015 Rhineland-Palatinate succeeded in maintaining inbound tourism at the encouraging level we achieved in 2014. The number of overnight stays by international visitors rose by 1 per cent to 5.9 million, which corresponds to 24 per cent of all overnight stays in the region. Nearly two thirds, and therefore the largest proportion of foreign visitors, came from neighbouring Holland and Belgium. Our international marketing will continue to focus heavily on these countries.

In 2015 we conducted an extensive study to analyse the markets and aligned our marketing activities accordingly. Going forward, we want to maintain the stable level of growth in the Dutch and Belgian markets but also to gain further market share from France, the UK, Austria, Switzerland and Spain. People from outside Germany like to visit Rhineland-Palatinate because of its many options for walking and cycling in the countryside, its romantic river valleys and castles, and its excellent wines.

Hans-Jürgen Goller, Saxony We saw very positive developments in inbound tourism in Saxony in 2015, with a 5.1 per cent increase in arrivals and a 3.5 per cent rise in the number of overnight stays. As in previous years, the Netherlands was our largest source market in 2015, accounting for over 190,000 overnight stays, an increase of just under 9 per cent. What is particularly positive about the Dutch is that they also travel to the rural regions in Saxony, whereas three quarters of visitors



Hans-Jürgen Goller
Managing Director of Tourismus Marketing Gesellschaft Sachsen mbH

Bettina Quäschning
Senior Manager, Investitions- und Marketinggesellschaft Sachsen-Anhalt mbH

Uwe Wanger
Managing Director of Tourismus-Agentur Schleswig-Holstein (TA.SH)

Bärbel Grönegres
Managing Director of Thüringer Tourismus GmbH

Birgit Grauvogel, Saarland The Saarland is establishing itself more and more as a destination for short breaks among people who enjoy nature and culture. This trend is borne out by a survey conducted as part of our market research, in which 34 per cent of respondents said that they thought the Saarland was suitable for holidays in nature and for walking.

The Saarland is ideal for nature-based holidays and active pursuits not least because of the Bliesgau UNESCO Biosphere Reserve and Hunsrück-Hochwald National Park, Europe's newest national park. And our visitors particularly like the fact that the Saarland offers a mix of travel experiences in a relatively compact area, and that we are close to France and Luxembourg. Our food and drink also ties in perfectly with our tourism themes. This is where our future lies if the quality of the products is right.

Our activities are clearly focused on our key international source markets, which are France, Belgium, the Netherlands, Luxembourg and Switzerland. This is where we anticipate strong growth in the future and where we can increasingly position our mix of nature-based offerings and cultural attractions.

from the other international markets travel only to the region's two major cities, Dresden and Leipzig. In terms of overnight stays by Dutch visitors in 2015, the Erzgebirge mountains recorded an increase of 78 per cent, Saxon Switzerland and Upper Lusatia both went up by 19 per cent and the Vogtland – although at a low level overall – saw a rise of nearly 80 per cent! Switzerland and the USA were ranked second and third. Figures for these two countries were also up on the prior year.

Of the largest international source markets, Spain (62 per cent), China (just under 27 per cent) and the Czech Republic (12.5 per cent) generated the highest rates of growth. Only the Russian market experienced a downturn. However, as in 2014, the decline in Saxony was less pronounced than in Germany as a whole.

It is difficult to make predictions for the current year. There certainly remains great potential for inbound tourism in Germany as a whole and in Saxony specifically. However, in view of the terrorist threats in Europe, the refugee crisis, and the economic instability in a number of key source markets, the global situation is very volatile. Also, Germany can be more restrictive in issuing visas compared with other Schengen countries, which is not always helpful.

Bettina Quäschning, Saxony-Anhalt In 2015 Saxony-Anhalt saw further growth in the number of visitor arrivals and overnight stays. The Federal Horticultural Show and the Cranach the Younger exhibition both helped to bring in more tourists last year, which was reflected in strong increases in visitor numbers in the places where these events were held, namely the Altmark region and Anhalt, Dessau and Wittenberg.

The growth in international arrivals was particularly strong in 2015, with Saxony-Anhalt registering an increase of 12.4 per cent. This is in line with our expectations that inbound travel will continue to offer the biggest growth opportunities for the region's tourism over the next few years.

Our two anniversaries, '500 years since the Reformation' and '100 years of the Bauhaus', will be of great national and international interest. As the cradle of the Reformation, Saxony-Anhalt will attract Protestants and culturally minded visitors from all over the world in 2017, and the Bauhaus sites in Dessau, together with the new Bauhaus Museum, will be among Germany's cultural highlights in 2019.

Uwe Wanger, Schleswig-Holstein More and more international visitors are discovering Schleswig-Holstein, Germany's true north. Over the past four years, the number of overnight stays by visitors from abroad has risen by 33 per cent. In 2015 the number of inbound overnight stays rose by 5.5 per cent on the previous year to reach almost two million. Currently 7.4 per cent of holidaymakers come from outside Germany. In the larger town and cities of Kiel, Lübeck and Flensburg, the proportion of international visitors is over 20 per cent.

For Schleswig-Holstein, this means there is potential for further growth in the tourism sector. That is why the region's tourism agency, Tourismus-Agentur Schleswig-Holstein, is making international marketing a key focus as of this year. Over the next five years, the strategy will be to concentrate on Austria, Switzerland and Denmark. Initiatives will include market research, press work and collaborations, as well as online and print media in several languages.

Quality is the top requirement in the travel industry. All visitors want high-quality accommodation, attractions

and facilities. Many tourists come from neighbouring Denmark to go shopping in Schleswig-Holstein's towns and cities, and visitors from Sweden have a great interest in playing golf here. Holidaymakers from the Alpine countries are attracted by the natural scenery. The Wadden Sea, the rugged cliffs and the inland regions with their lakes, forests and quaint north German villages offer a welcome contrast for visitors from Austria and Switzerland.

Bärbel Grönegres, Thuringia We can look back on a successful year in 2015. Our theme for the year, 'Cranach in Thuringia', generated great interest in Thuringia, both nationally and internationally. A particular highlight for us was undoubtedly the GTM Germany Travel Mart™ in Erfurt and Weimar. It was the first time that Thuringia had hosted the German travel industry's largest workshop for inbound tourism.

This year we are highlighting Thuringia's national parks and other protected landscapes. The campaign's focus on nature will help us to drive further demand from our most important international source market, the Netherlands. But our marketing activities will also continue to focus on the key themes of 'towns, cities and culture', 'UNESCO World Heritage' and 'music' – particularly for the Austrian and Swiss markets. In April we saw the opening of the Thuringian state exhibition 'The Ernestines. A Dynasty shapes Europe'. The interest in this exhibition is already considerable and is certain to grow. This event brings us ever closer to the momentous anniversary of the Reformation in 2017. Thuringia is Luther country: we are looking forward to a whole host of exciting events on the Reformation theme – such as concerts featuring Lutheran chorales, exhibitions at Reformation-related locations and special church services. The national exhibition 'Luther and the Germans' at Wartburg Castle will undoubtedly be one of the highlights.

After in-depth analysis of our source markets in 2015, we are stepping up our activities in the Netherlands, Austria and Switzerland, as well as in the UK and the USA. And we are delighted to have now established a presence in France and Denmark.

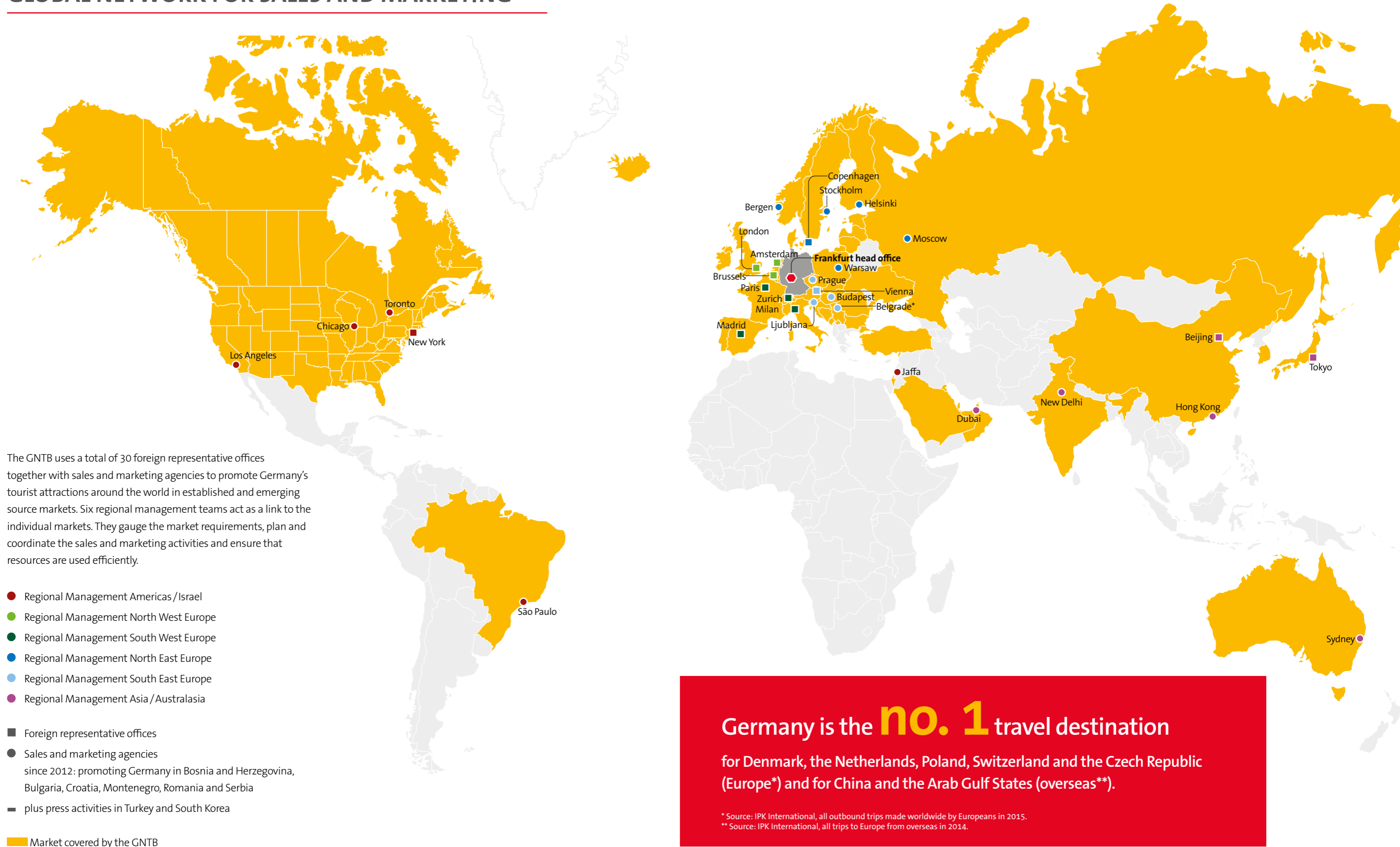
Sublime. Vineyard near Rotenberg, Baden-Württemberg

INTERNATIONAL MARKETING

Analysis of current demand and future potential in tourism source markets provides the basis for the worldwide marketing of Destination Germany. The GNTB's work is focused on developing these markets, adapting theme-based campaigns to suit local requirements and conducting targeted marketing measures through its 30 foreign representative offices and sales and marketing agencies.



GLOBAL NETWORK FOR SALES AND MARKETING



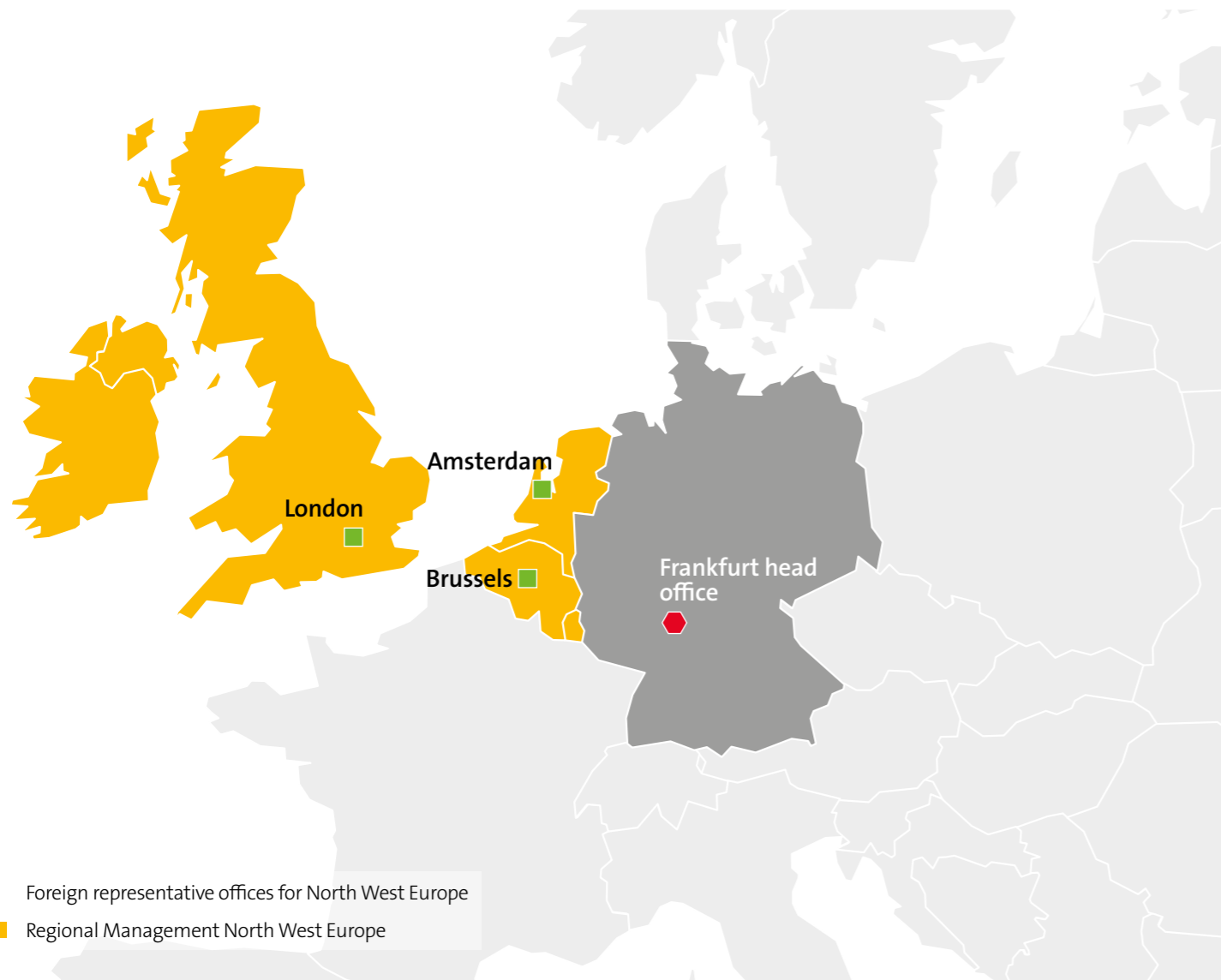
Germany is the **no. 1** travel destination

for Denmark, the Netherlands, Poland, Switzerland and the Czech Republic (Europe*) and for China and the Arab Gulf States (overseas**).

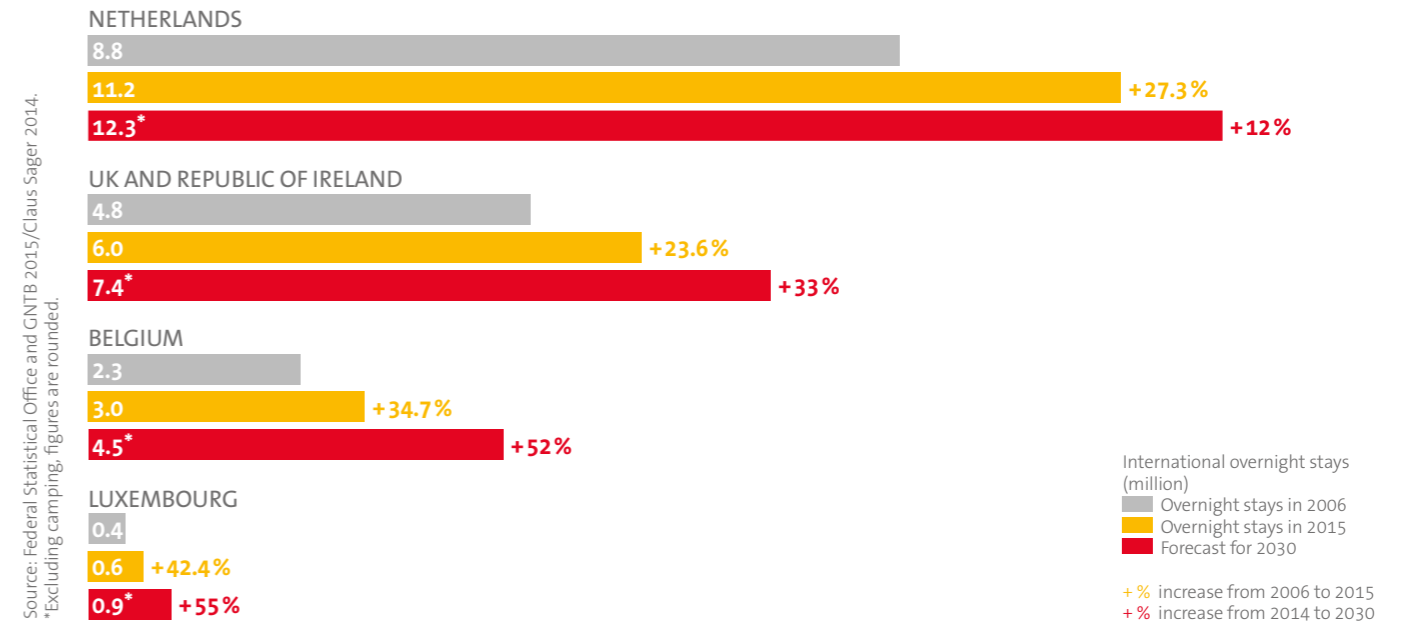
* Source: IPK International, all outbound trips made worldwide by Europeans in 2015.
** Source: IPK International, all trips to Europe from overseas in 2014.

REGIONAL MANAGEMENT NORTH WEST EUROPE

The Regional Management North West Europe territory contains **three of the ten biggest source markets** for the German tourism industry. All countries in this region contributed to the success of Destination Germany by delivering growth in 2015. With nearly **20.8 million overnight stays**, they generated just **over one quarter of all inbound tourism** last year. North West Europe is the largest source region for the German tourism industry.



Growth in the number of inbound overnight stays in Germany by visitors from North West Europe up to 2030



NETHERLANDS

Around 11.2 million overnight stays is equivalent to a market share of 14 per cent. This makes the Netherlands by far the biggest foreign source market for tourism in Germany. Apart from a few exceptions, the Dutch market has been growing continually for several years.

Over three quarters of all Dutch visitors to Germany are holidaymakers. Their preferences are for holiday regions (42 per cent), city breaks and events (20 per cent) and multi-destination tours (15 per cent). Just under half of Dutch travellers to Germany are from the age group of 45 to 64 year olds. Nearly half of all Dutch travellers have been to Germany four times or more.

The GNTB's core marketing themes for the Netherlands are activity-based holidays, winter sports and camping & caravanning for the 50+ target demographic. A traditional focus for this market is the House of Orange Route with its 32 historic sites.

Germany was the **no. 1 outbound destination** for Dutch travellers with **4.5 million trips** in 2015

1st GERMANY	4th BELGIUM
2nd FRANCE	5th UK
3rd SPAIN	

Population: 16.9 million
 Per capita GDP: €41,578; biggest segment for travel to Germany: **holidays (78%)**



Beach on Norderney island, Lower Saxony

TOP DESTINATIONS IN GERMANY / FEDERAL STATES

	1st	2nd	3rd
NETHERLANDS	Rhineland-Palatinate 24.8%*	North Rhine-Westphalia 22.1%*	Bavaria 13.4%*
UK	Berlin 27.6%*	Bavaria 19.2%*	North Rhine-Westphalia 14.4%*
BELGIUM	Rhineland-Palatinate 31.3%*	North Rhine-Westphalia 21.9%*	Baden-Württemberg 13.5%*
LUXEMBOURG	Baden-Württemberg 27.9%*	Bavaria 14.7%*	North Rhine-Westphalia 14.1%*

2015 statistics / *Federal state's share of all overnight stays from the market concerned.

Source: Federal Statistical Office.

UK/IRELAND

With a market share of 7 per cent, the United Kingdom remains the third largest European source market for Germany, behind the Netherlands and Switzerland. Just under two thirds of British visitors to Germany are holidaymakers, predominantly on longer holidays. City breaks and events are particularly popular with the British, accounting for 53 per cent of the market.

Culture and history are key travel motivations for British people visiting Germany. To cater to this, the GNTB focuses its work in the UK on themes such as the Royal Heritage Route in combination with Palaces, Parks and Gardens. Germany for young people, active holidays, camping, barrier-free travel and LGBT also play an important role in this market.

Ireland contributed 435,000 overnight stays in 2015, a year-on-year increase of 13 per cent that surpassed the average for the region as a whole. The annual growth rate of 7.3 per cent over the past ten years is one of the highest of all European source markets.

BELGIUM/LUXEMBOURG

With a market share of 3.8 per cent, Belgium maintained its usual position in the top ten source markets for the German tourism industry. Together with Luxembourg, it accounted for around 5 per cent of all international overnight stays in Germany. The number of overnight stays by visitors from Belgium topped the three million mark for the first time in 2015; just under 600,000 overnight stays were recorded from Luxembourg.

72 per cent of all trips to Germany from Belgium were for a holiday, of which nearly half were short breaks. The market share of city breaks and events travel was 36 per cent, and just over a quarter of trips were to the holiday regions. Of those travelling to Germany, the most dominant group by far is the 35 to 44-year-old age group at 28 per cent. Cultural and historical travel are focal points for the GNTB's marketing in Belgium and Luxembourg.

Germany was the **sixth** most popular **outbound destination** for **UK** travellers with **3.1 million trips** in 2015

1st SPAIN	4th ITALY
2nd FRANCE	5th IRELAND
3rd USA	6th GERMANY

Population: **64.1 million**Per capita GDP: **€40,435**; biggest segment for travel to Germany: **holidays (64%)**

Germany was the **second** most popular **outbound destination** for **Belgian** travellers with **2.1 million trips** in 2015

1st FRANCE	4th NETHERLANDS
2nd GERMANY	5th ITALY
3rd SPAIN	

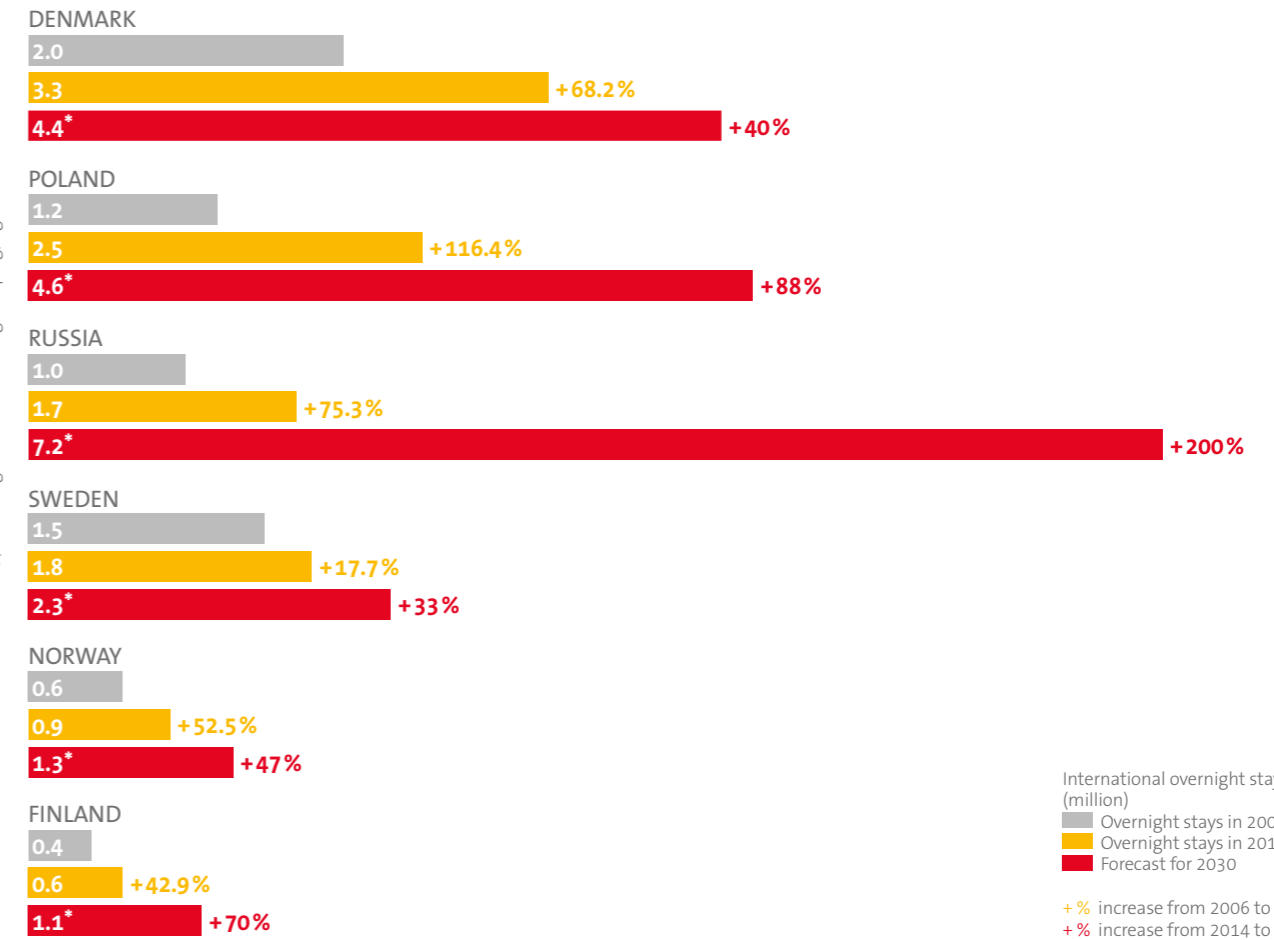
Population: **11.3 million**Per capita GDP: **€37,133**; biggest segment for travel to Germany: **holidays (72%)**

REGIONAL MANAGEMENT NORTH EAST EUROPE

The Regional Management North East Europe territory covers markets that are very different in nature. The performances of the individual countries within it are mixed as a result. There has been **increased demand** from the three largest markets by volume, **Denmark, Poland and Sweden**, the smaller Baltic States and Iceland too. After years of growth, **Russia** registered a **significant fall** for the second year in a row. **Norway and Finland** showed a **small decline**.



Growth in the number of inbound overnight stays in Germany by visitors from North East Europe up to 2030



DENMARK

Denmark improved its ranking in the top ten inbound markets for Germany by one place to seventh position thanks to an increase of 5 per cent to nearly 3.3 million overnight stays and a market share of 4.1 per cent. Over the past ten years, the market has grown by an average of 6.4 per cent, largely outperforming the level for Europe as a whole.

Holidays accounted for 68 per cent of trips to Germany made by Danes in 2015, with an equal split between short and long breaks. Very popular are short city breaks and events travel with a share of 66 per cent of all short breaks. The Danes are frequent visitors to Germany: 49 per cent have been there four times or more.

Germany was the **no. 1 outbound destination** for **Danish** travellers with **2.9 million trips** in 2015

1st GERMANY	4th UK
2nd SPAIN	5th ITALY
3rd SWEDEN	

Population: **5.6 million**
 Per capita GDP: **€48,122**; biggest segment for travel to Germany: **holidays (68%)**

Sources: population: CIA World Factbook; per capita GDP: Germany Trade & Invest (GTAI), 'Wirtschaftsdaten kompakt'; travel segments: GNTB/WTM, IPK 2015; Germany as a travel destination: GNTB/WTM, IPK 2015.

POLAND

Poland is one of the most buoyant European source markets. In 2014 Germany's eastern neighbour ranked among its top ten countries for inbound tourism for the very first time, and was able to consolidate this position in 2015. With an average age of 40, visitors from Poland belong to the youngest group of visitors to Germany. Trips from Poland are mainly short breaks. The GNTB in Poland focuses its marketing on short breaks, city breaks and active holidays and on the new federal states in eastern Germany, which offer ample opportunity for trips near the Polish border. Cross-border projects and youth travel are also being promoted.

Germany was the **no. 1** outbound destination for **Polish** travellers with **7.4 million trips** in 2015

1st GERMANY	4th ITALY
2nd UK	5th CROATIA
3rd GREECE	

Population: **38.6 million**
Per capita GDP: **€11,443**; biggest segment for travel to Germany: **holidays (41%)**

RUSSIA

After four years of exceptional growth of between 16 per cent and 26 per cent, the Russian market experienced a downturn in 2014 and 2015. Russia finished in 15th place in the ranking of source markets at the end of 2015. In the long term, however, the signs are pointing towards growth for the Russian market. The GNTB's forecast for 2030 puts Russia in one of the top positions for inbound tourism to Germany. Prominent features of inbound tourism from Russia are the proportion of the market accounted for by long holidays (77 per cent) and business travel (35 per cent), the high level of spending and the young age of visitors. Shopping is particularly important to Russian visitors.

Germany was the **second** most popular outbound destination for **Russian** travellers with **1.7 million trips** in 2015

1st TURKEY	4th UKRAINE
2nd GERMANY	5th EGYPT
3rd CHINA	

Population: **142.4 million**
Per capita GDP: **US\$ 8,058**; biggest segment for travel to Germany: **holidays (51%)**

SWEDEN

Sweden is the 14th largest source market for Germany, accounting for 2.2 per cent of inbound travel to the country. Holidaymakers make up 73 per cent of all Swedish travellers to Germany, with just over half (51 per cent) heading on city breaks or travelling to events. Berlin is by far the most in-demand city destination. Eight out of ten visitors from Sweden are over 45 years of age. Of all Swedish travellers to Germany last year, 58 per cent had already been to Germany four times or more. Key target demographics for the GNTB in Sweden are active seniors and families.

Germany was the **second** most popular outbound destination for **Swedish** travellers with **1.6 million trips** in 2015

1st SPAIN	4th NORWAY
2nd GERMANY	5th GREECE
3rd DENMARK	

Population: **9.8 million**
Per capita GDP: **€46,054**; biggest segment for travel to Germany: **holidays (73%)**

NORWAY

Over the past ten years Norway's volume of overnight stays in Germany has risen by an annual average of 5.5 per cent. Norway is currently in 19th place in the ranking of source markets.

Norwegian holidaymakers to Germany prefer short breaks (56 per cent). The most popular types of holiday are city breaks and events travel (41 per cent) and cruises (26 per cent), and they are big spenders (on average €337 per night including transport, food and drink, shopping, etc.).

Germany was the **fifth** most popular outbound destination for **Norwegian** travellers with **0.6 million trips** in 2015

1st SPAIN	4th UK
2nd SWEDEN	5th GERMANY
3rd DENMARK	

Population: **5.2 million**
Per capita GDP: **€70,737**; biggest segment for travel to Germany: **holidays (70%)**

FINLAND

Finland has a share of just under 1 per cent of the German inbound tourism market. Over the last ten years the number of overnight stays has increased by 43 per cent. However, during the year under review a small decrease was evident.

70 per cent of Finnish holidaymakers in Germany go on city breaks or visit events. The GNTB therefore focuses its marketing on young people with an interest in festivals, subcultures and concerts, as well as on themes related to the Luther decade.

Germany was the **fourth** most popular outbound destination for **Finnish** travellers with **0.5 million trips** in 2015

1st ESTONIA	4th GERMANY
2nd SWEDEN	5th NORWAY
3rd SPAIN	

Population: **5.5 million**
Per capita GDP: **€38,532**; biggest segment for travel to Germany: **holidays (57%)**

TOP DESTINATIONS IN GERMANY / FEDERAL STATES

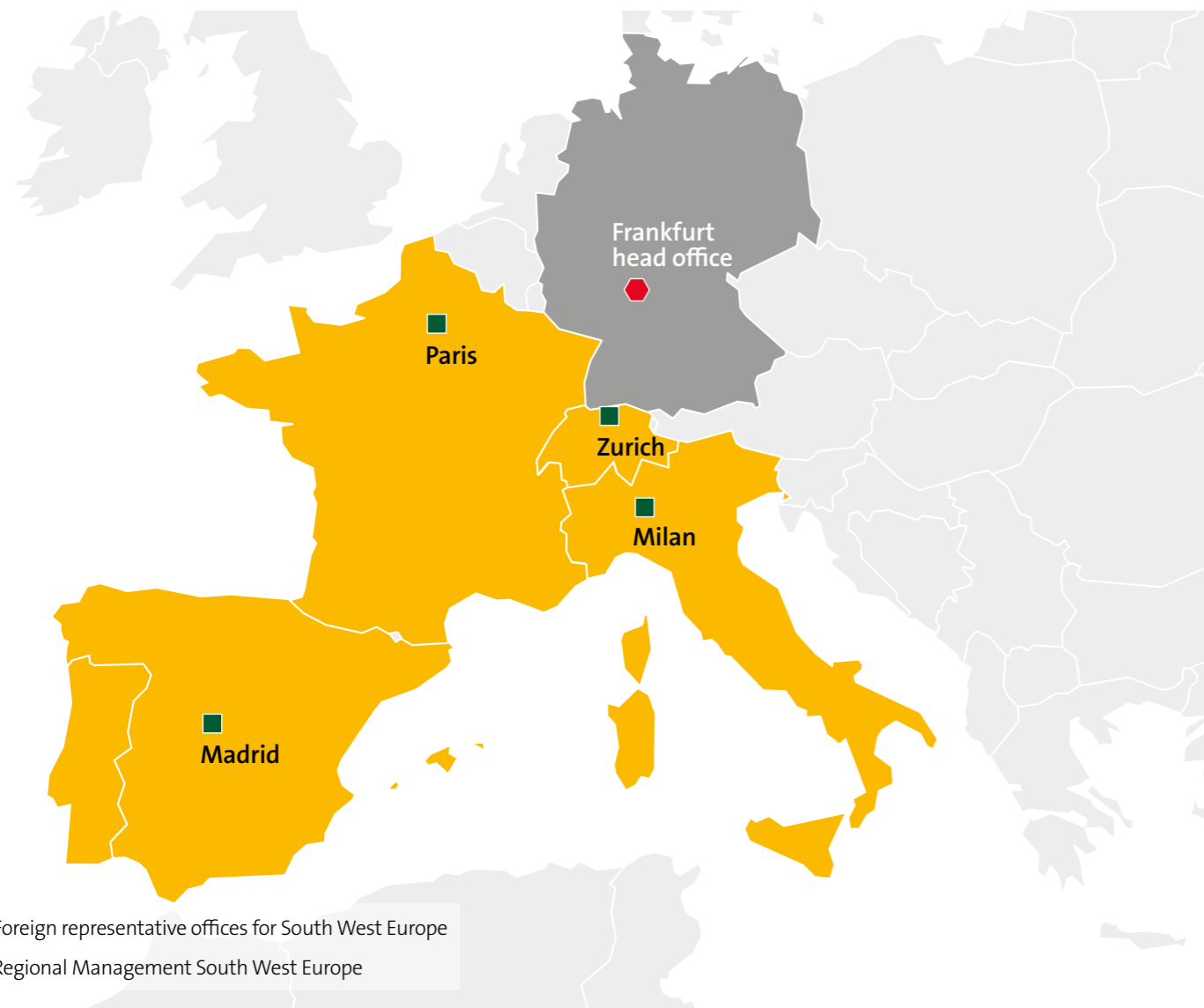
	1st	2nd	3rd
DENMARK	Schleswig-Holstein 23.7%*	Berlin 20.2%*	Lower Saxony 11.6%*
POLAND	Bavaria 17.3%*	North Rhine-Westphalia 13.6%*	Berlin 12.6%*
RUSSIA	Bavaria 30.0%*	Berlin 20.9%*	North Rhine-Westphalia 12.8%*
SWEDEN	Berlin 26.3%*	Schleswig-Holstein 14.5%*	Bavaria 11.5%*
NORWAY	Berlin 35.0%*	Bavaria 13.1%*	Schleswig-Holstein 10.0%*
FINLAND	Berlin 33.7%*	Bavaria 18.7%*	North Rhine-Westphalia 9.2%*

2015 statistics / *Federal state's share of all overnight stays from the market concerned.

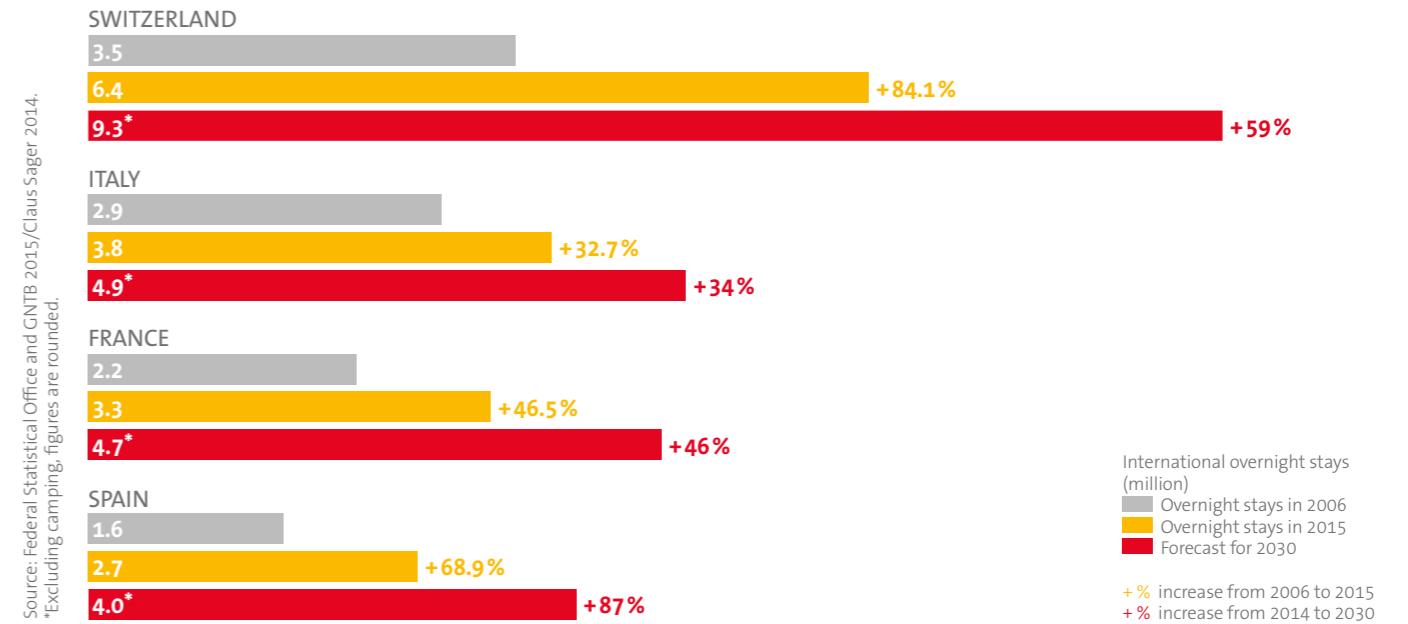
Sources: population: CIA World Factbook; per capita GDP: Germany Trade & Invest (GTAI), Wirtschafsstadaten kompakt; travel segments: GNTB/WTM, IPK 2015; Germany as a travel destination: GNTB/WTM, IPK 2015.

REGIONAL MANAGEMENT SOUTH WEST EUROPE

The traditionally strong markets in south-west Europe generated over **16 million overnight stays** in 2015 – a share of **21 per cent** of the total inbound tourism market. All markets in the region recorded increases, in particular Spain, which saw the largest absolute growth in 2015 with 517,000 additional overnight stays. This was the fastest growing European source region for the German tourism industry: the countries in the area covered by Regional Management South West Europe saw a total **increase of 8 per cent – significantly above the European average.**



Growth in the number of inbound overnight stays in Germany by visitors from South West Europe up to 2030



Sources: population: CIA World Factbook; per capita GDP: Germany Trade & Invest (GTAI); 'Wirtschaftsdaten kompakt'; travel segments: GNTB/WTM, IPK 2015; Germany as a travel destination: GNTB/WTM, IPK 2015.

SWITZERLAND

Switzerland continued an uninterrupted ten-year period of average growth of 7.1 per cent and consolidated its position as Destination Germany's second biggest source market with nearly 6.4 million overnight stays. 58 per cent of all trips to Germany by Swiss visitors are holidays, of which around a quarter are spent in holiday regions. However, city breaks and cultural and sporting events make up the largest part of this segment, at 37 per cent.

In the years ahead, the GNTB will focus on Luther and the anniversary of the Reformation in 2017. The 'Young Danube' will also be promoted in Switzerland.

And because the franc has been unpegged from the euro, Germany's prices have become even more attractive to people from Switzerland. This has given a further boost to tourism in the border regions and to shopping tourism.

Germany was the **no. 1** outbound destination for **Swiss** travellers with **6.1 million** trips in 2015

1st GERMANY	4th SPAIN
2nd FRANCE	5th AUSTRIA
3rd ITALY	

Population: **8.1 million**
Per capita GDP: **€71,735**; biggest segment for travel to Germany: **holidays (58%)**

ITALY

Italy, with a market share of 4.8 per cent, is the fifth largest source market for Destination Germany.

Nearly two thirds of Italian visitors to Germany are holidaymakers, almost half of whom go on multi-destination tours. One in four holiday trips are to a German city. The 'younger travellers' age group (15 to 34 year olds) is strongly represented, comprising 41 per cent of the market. This is one reason why there are so many first-time travellers (35 per cent of the market) and why the internet is so popular for making holiday bookings.

Germany was the **third** most popular **outbound destination** for **Italian** travellers with **2.3 million trips** in 2015

1st FRANCE	4th CROATIA
2nd SPAIN	5th UK
3rd GERMANY	

Population: **61.9 million**
Per capita GDP: **€27,414**; biggest segment for travel to Germany: **holidays (64%)**

FRANCE

France generated 3.1 million overnight stays in Germany. With a market share of 4.1 per cent of all overnight stays it is comfortably in the top ten most important source markets.

Over half of all trips to Germany from France were for a holiday (56 per cent). Major cities and short breaks to sporting or cultural events are in high demand. The train is the main mode of travel for almost one in five trips by French visitors to Germany.

Germany was the **third** most popular **outbound destination** for **French** travellers with **2.4 million trips** in 2015

1st SPAIN	4th ITALY
2nd UK	5th MOROCCO
3rd GERMANY	

Population: **66.6 million**
Per capita GDP: **€33,286**; biggest segment for travel to Germany: **holidays (56%)**

Sources: population: CIA World Factbook; per capita GDP: Germany Trade & Invest (GTAI), 'Wirtschaftsdaten kompakt'; travel segments: GNTB/WTM, IPK 2015; Germany as a travel destination: GNTB/WTM, IPK 2015.

Source: Federal Statistical Office.

TOP DESTINATIONS IN GERMANY / FEDERAL STATES

	1st	2nd	3rd
SWITZERLAND	Baden-Württemberg 37.1%*	Bavaria 22.9%*	Berlin 10.3%*
ITALY	Bavaria 32.8%*	Berlin 24.9%*	Baden-Württemberg 12.8%*
FRANCE	Baden-Württemberg 25.9%*	Berlin 18.2%*	Bavaria 17.4%*
SPAIN	Berlin 31.7%*	Bavaria 19.8%*	North Rhine-Westphalia 11.4%*

2015 statistics / *Federal state's share of all overnight stays from the market concerned.

SPAIN/PORTUGAL

After several weaker years caused by the financial crisis, Spain generated strong growth again in 2015. The market expanded by 24.2 per cent, generating almost 517,000 additional overnight stays. Spain takes the top spot in the ranking of absolute growth in 2015 and ranks tenth in the top ten most important source markets. Holidaymakers make up 65 per cent of Spanish visitors to Germany. Seven out of ten holidays are stays of more than four nights. Demand is buoyant for city breaks and events (54 per cent); a fifth of Spanish holidaymakers opt for multi-destination tours. The 15 to 34-year-old age group is strongly represented, accounting for 34 per cent of all visitors.

The Portuguese market is covered by the GNTB in Madrid. It again delivered double-digit growth of nearly 13 per cent last year.

Germany was the **fourth** most popular **outbound destination** for **Spanish** travellers with **1.9 million trips** in 2015

1st UK	4th GERMANY
2nd FRANCE	5th ITALY
3rd PORTUGAL	

Population: **48.1 million**
Per capita GDP: **€24,166**; biggest segment for travel to Germany: **holidays (65%)**



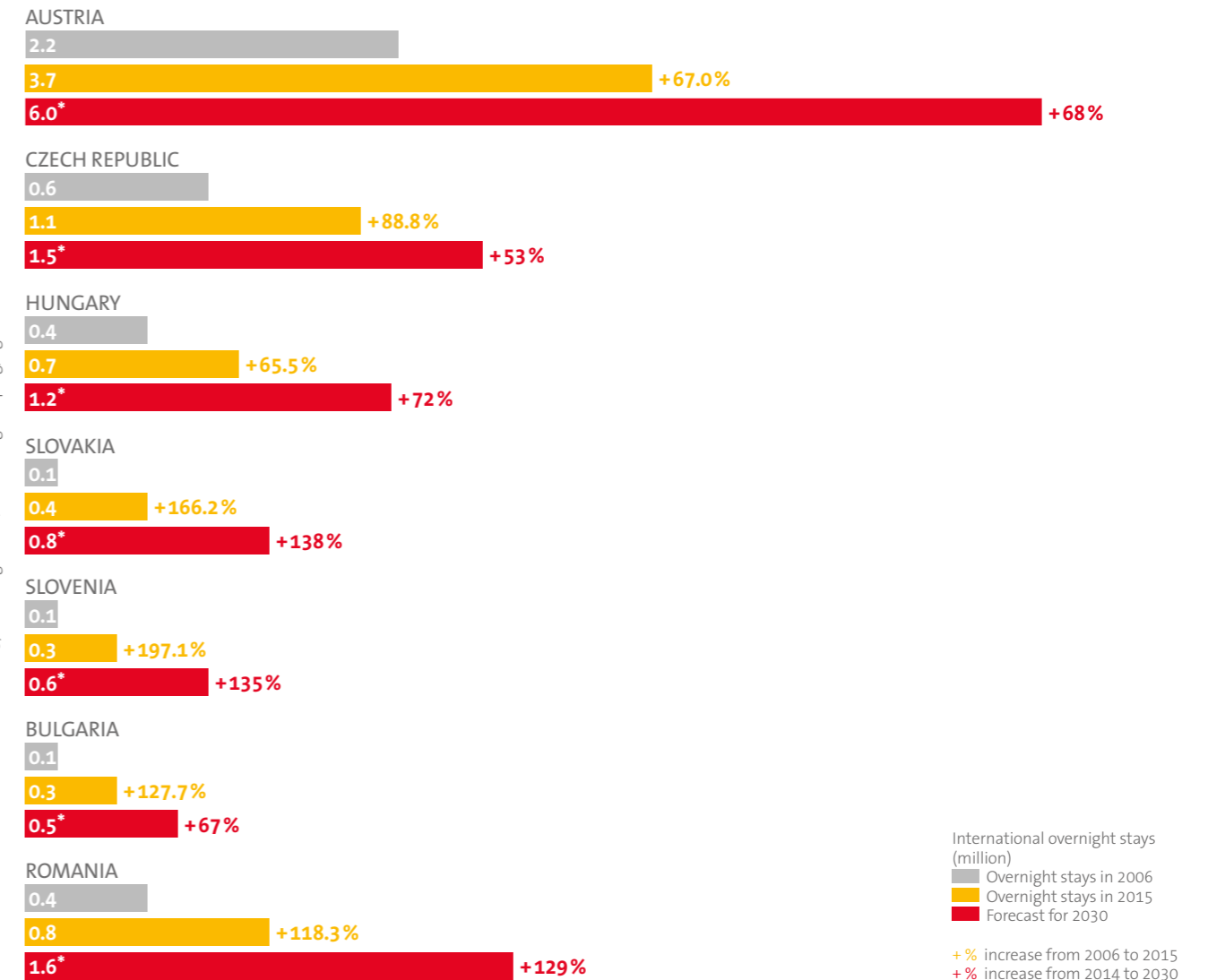
Belvedere Palace in the new garden on Pfingstberg hill in Potsdam, Brandenburg

REGIONAL MANAGEMENT SOUTH EAST EUROPE

With over **8.5 million overnight stays** and a market share of 11 per cent, South East Europe is the smallest European source region for the German travel industry. The region as a whole **grew by 6.7 per cent** in 2015. However, because it covers a wide range of markets there is a wide spread of growth rates, ranging from a **47 per cent increase for Croatia** to a 0.1 increase for Greece. **Austria** remains a **constant** in terms of international overnight stays.



Growth in the number of inbound overnight stays in Germany by visitors from South East Europe up to 2030



Sources: population: CIA World Factbook; per capita GDP: Germany Trade & Invest (GTAI); 'Wirtschaftsdaten kompakt'; travel segments: GNTB/WTM, IPK 2015; Germany as a travel destination: GNTB/WTM, IPK 2015.

AUSTRIA

Austria, with a market share of 4.6 per cent in 2015, held on to sixth place in the global ranking of all source markets for German tourism. Over the past ten years its volume of overnight stays has risen by 67 per cent.

Holidaymakers account for 42 per cent of visitors to Germany from Austria; 34 per cent of visitors travel on business and 24 per cent visit friends or family. City breaks and events are the dominant segment, accounting for 47 per cent of the market. Of all Austrian travellers to Germany in 2015, 58 per cent had already been to Germany four times or more. The GNTB in Austria is heavily promoting city breaks, cultural travel and activity-based holidays (e.g. 'Young Danube').

Germany was the **second** most popular **outbound destination** for **Austrian** travellers with **3.6 million trips** in 2015

1st ITALY	4th SPAIN
2nd GERMANY	5th TURKEY
3rd CROATIA	

Population: **8.7 million**
Per capita GDP: **€39,872**; biggest segment for travel to Germany: **holidays (42%)**

CZECH REPUBLIC

The Czech Republic has firmly established itself in the top 20 source markets for inbound tourism to Germany, recording average annual growth rates of 6.7 per cent over the past ten years and an increase in overnight stays of 89 per cent. Holidaymakers account for 46 per cent of all trips from the Czech Republic to Germany, while 26 per cent of trips were to visit friends or family. With an average age of 39, visitors from the Czech Republic to Germany are some of the youngest. Nevertheless, the proportion of visitors in 2015 that had been to Germany at least four times before was unusually high, at 76 per cent.

Germany was the **no. 1 outbound destination** for Czech travellers with **2.2 million trips** in 2015

1ST GERMANY	4TH CROATIA
2ND AUSTRIA	5TH UK
3RD SLOVAKIA	

Population: **10.6 million**
Per capita GDP: **€16,100**; biggest segment for travel to Germany: **holidays (46%)**

HUNGARY

The development of inbound tourism from Hungary has been inconsistent over the last few years with high, double-digit growth followed by years of stagnation or decline. Viewed over ten years the number of overnight stays (currently 707,000) has increased by 66 per cent. The structure of inbound tourism from Hungary is characterised by a high proportion of trips to visit friends and family and business travel (37 per cent and 36 per cent respectively). The business segment is dominated by promotable trips. Trips to cities and events are in high demand with holidaymakers (51 per cent). 17 per cent of Hungarian holidaymakers travel to the traditional holiday regions.

Germany was the **second most popular outbound destination** for Hungarian travellers with **0.6 million trips** in 2015

1st AUSTRIA	4th UK
2nd GERMANY	5th ITALY
3rd ROMANIA	

Population: **9.9 million**
Per capita GDP: **€11,504**; biggest segment for travel to Germany: **trips to visit friends and family (37%)**

SLOVAKIA

Slovakia's current market share of inbound tourism to Germany is only 0.5 per cent. However, the market has been expanding at an average rate of 12 per cent over the past nine years.

Germany was the **fourth most popular outbound destination** for Slovakian travellers with **0.5 million trips** in 2015

1st CZECH REPUBLIC	4th GERMANY
2nd AUSTRIA	5th CROATIA
3rd HUNGARY	

Population: **5.4 million**
Per capita GDP: **€16,700**; biggest segment for travel to Germany: **business travel (46%)**

The proportion of business trips is high, at 46 per cent; only around 27 per cent of Slovakian visitors to Germany are holidaymakers, with a further 27 per cent visiting friends or family. The average age is 36 years, and more than half belong to the 'younger travellers' age group (15 to 34 year olds).

SLOVENIA

Almost every year since 2007, Slovenia has delivered high rates of growth for inbound tourism to Germany, with its volume of overnight stays increasing by around 197 per cent. Germany is clearly benefiting from Slovenians' high propensity for travel (1.9 outbound trips per year).

Germany was the **second most popular outbound destination** for Slovenian travellers with **0.5 million trips** in 2015

1st CROATIA	4th AUSTRIA
2nd GERMANY	5th HUNGARY
3rd ITALY	

Population: **2.0 million**
Per capita GDP: **€19,224**; biggest segment for travel to Germany: **business travel (46%)**

Around a third of Slovenians' trips to Germany are for holidays; 46 per cent are for business. Particularly popular with holidaymakers are city breaks and events travel (44 per cent) and multi-destination trips (28 per cent). Of those travelling to Germany, the biggest group by far is the 35 to 44-year-old age group with 41 per cent.

BOSNIA AND HERZEGOVINA, BULGARIA, CROATIA, MONTENEGRO, ROMANIA, SERBIA

The high-potential markets in the Balkans currently generate around 2.5 million trips to Germany every year. Of the growth drivers in the region, the star performer is Romania, which in 2015 generated an increase of 10.1 per cent to reach 802,000 overnight stays. Croatia saw a further increase of 46.5 per cent to reach 287,000 overnight stays. The sales and marketing agency in Belgrade also manages the GNTB's activities in Serbia, Bulgaria, Montenegro and Bosnia and Herzegovina. The economic development so far has been inconsistent, but the financial potential is high across the board.

Germany was the **no. 1 outbound destination** for travellers from the Balkans with **2.5 million trips** in 2015

1st GERMANY	4th TURKEY
2nd GREECE	5th ITALY
3rd HUNGARY	

TOP DESTINATIONS IN GERMANY / FEDERAL STATES

	1st	2nd	3rd
AUSTRIA	Bavaria 39.1%*	Baden-Württemberg 13.0%*	Berlin 10.4%*
CZECH REPUBLIC	Bavaria 30.8%*	Baden-Württemberg 13.3%*	Berlin 9.3%*
HUNGARY	Bavaria 33.1%*	Baden-Württemberg 20.2%*	North Rhine-Westphalia 11.0%*
SLOVAKIA	Bavaria 31.9%*	Baden-Württemberg 17.1%*	North Rhine-Westphalia 11.5%*
SLOVENIA	Bavaria 33.5%*	Baden-Württemberg 17.0%*	North Rhine-Westphalia 10.5%*
BULGARIA	Bavaria 24.6%*	Baden-Württemberg 13.4%*	North Rhine-Westphalia 12.6%*
ROMANIA	Bavaria 26.7%*	Baden-Württemberg 19.4%*	Hessen 14.7%*

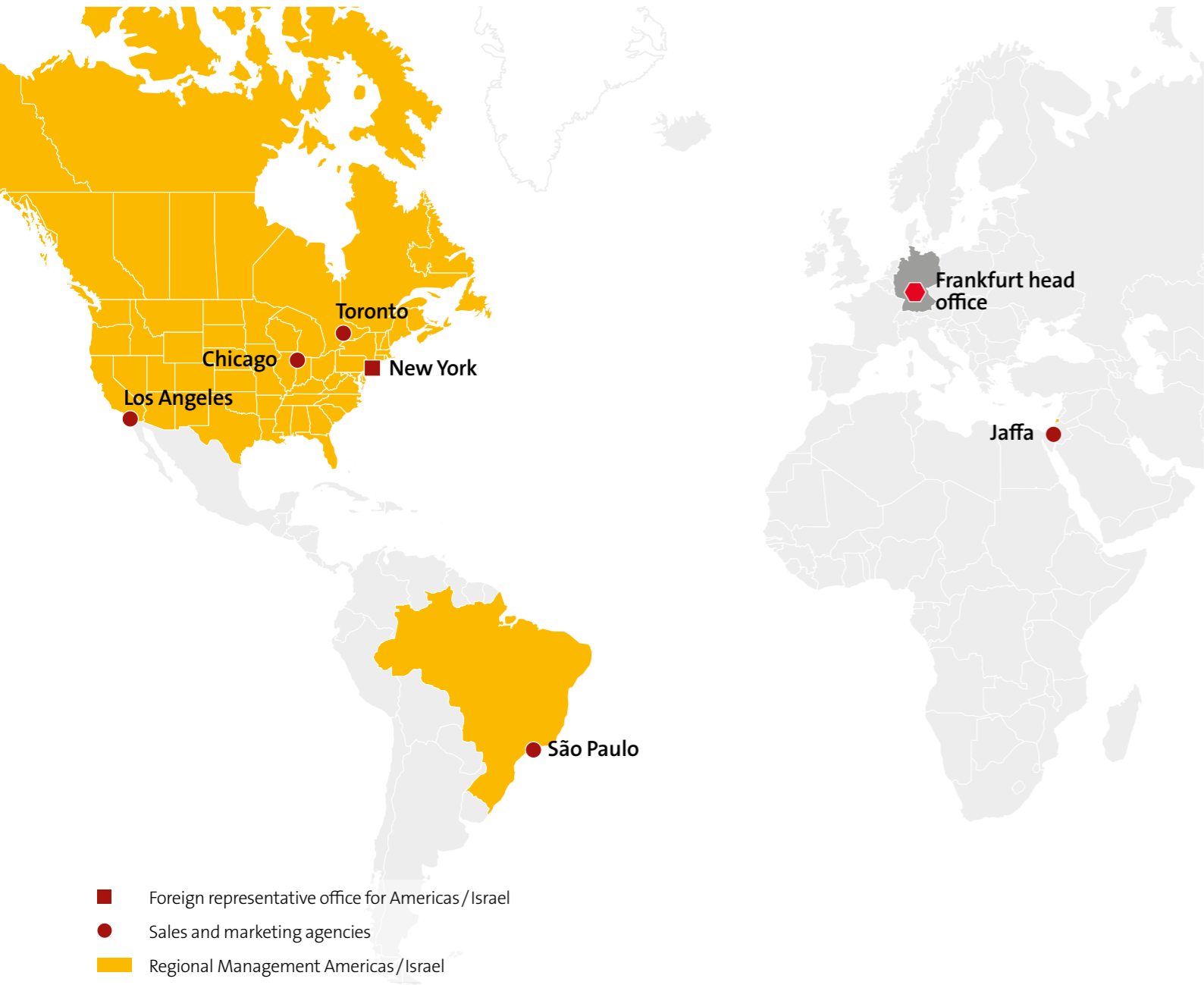
2015 statistics / *Federal state's share of all overnight stays from the market concerned.

Sources: population: CIA World Factbook; per capita GDP: Germany Trade & Invest (GTAI), Wertschaftsdaten kompakt; travel segments: GNTB/WTM, IPK 2015; Germany as a travel destination: GNTB/WTM, IPK 2015.

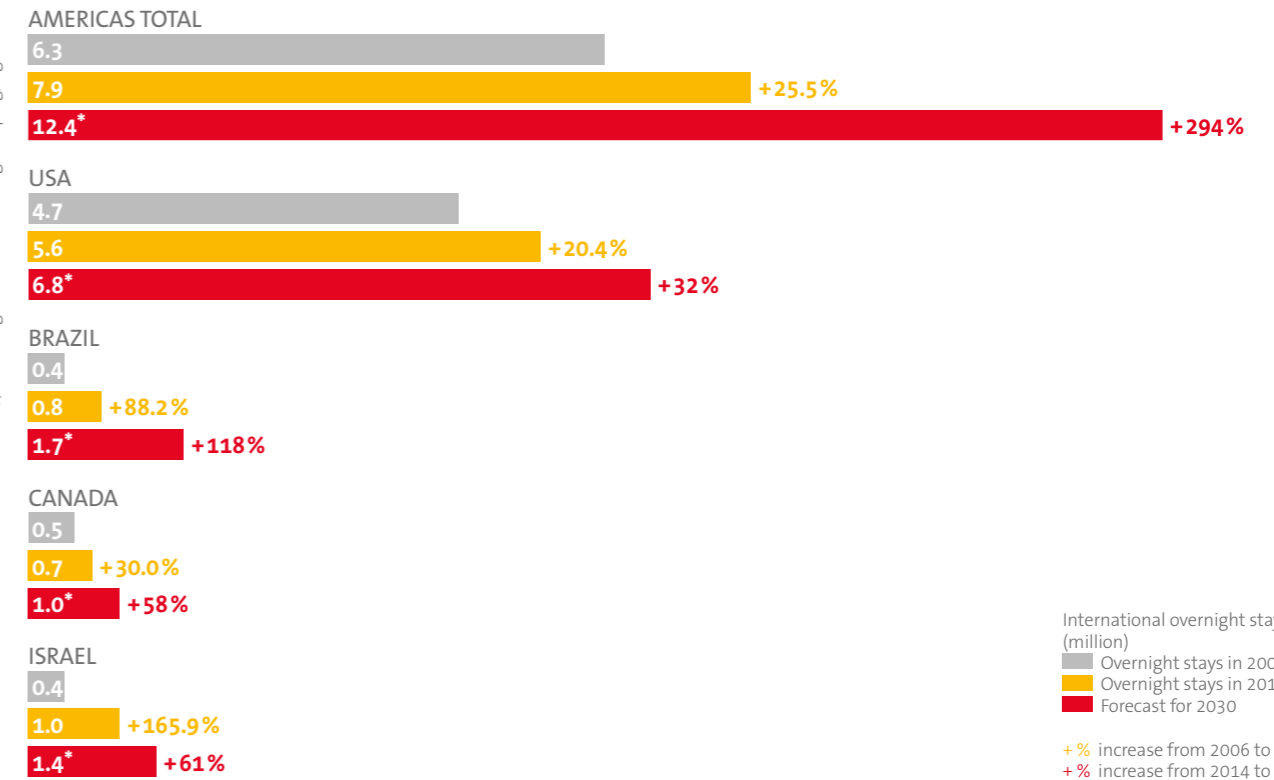
Source: Federal Statistical Office.

REGIONAL MANAGEMENT AMERICAS/ISRAEL

In 2015 the Americas/Israel region generated cumulative growth of **8.6 per cent** to reach approximately **8.9 million overnight stays**. The USA, the most important overseas market, delivered stable growth. **Israel** remains the growth engine for the region, recording an **increase of 14.2 per cent**. There were also over **half a million overnight stays** from the other South American markets, an increase of **11.2 per cent**.



Growth in the number of inbound overnight stays in Germany by visitors from the Americas/Israel up to 2030



USA

In the ranking of Germany's biggest source markets worldwide, the USA occupies third place with a market share of 7 per cent and a year-on-year increase in overnight stays of 8.5 per cent. It is also by far the biggest overseas market for inbound tourism to Germany.

Nearly half of all guests travelling from the USA to Germany are holidaymakers. Travellers from the USA are among the biggest spenders in Destination Germany, parting with an average of €2,127 per trip (€256 per overnight stay). They are also one of the top tax-free shopping nations.

The GNTB's USA office is resolutely positioning Germany as a land of discoveries. This involves targeted marketing of cultural aspects, such as the Historic Highlights of Germany and Martin Luther, as well as the luxury travel segment and business travel.

Germany was the **fourth** most popular **outbound destination in Europe for US** travellers with **1.9 million trips** in 2014

1st UK	4th GERMANY
2nd ITALY	5th SPAIN
3rd FRANCE	

Population: **321.4 million**
 Per capita GDP: **US\$ 57,766**; biggest segment for travel to Germany: **holidays (48%)**

BRAZIL

Demand from Brazil for tourism to Germany continues to grow. Over the last ten years Brazil has had the highest annual growth rate of all source markets at 14.9 per cent. This upward trend lost some of its momentum in 2015, with the biggest South American source market for Destination Germany expanding by 1.9 per cent in 2015. Two thirds of the Brazilians who travel to Germany are holidaymakers, mainly exploring Germany on multi-destination tours.

The GNTB promotes a variety of marketing themes in Brazil, including shopping, wine and speciality cuisine, luxury travel and incentive activities. These themes enable the GNTB to reach different target groups by appealing to their individual interests. The objective is to position Germany as a land of discoveries.

Germany was the **fourth** most popular European destination for Brazilian travellers with **0.3 million trips** in 2014.

1st PORTUGAL	4th GERMANY
2nd SPAIN	5th FRANCE
3rd ITALY	

Population: **204.3 million**
Per capita GDP: **US\$ 8,118**; biggest segment for travel to Germany: **holidays (66%)**

CANADA

Following a year of stagnation in 2014, the Canadian market returned to growth in 2015, expanding by 3 per cent. Over three quarters of all Canadians visiting Germany are holidaymakers. Their preferences are for multi-destination tours and trips to cities.

A key focus for the GNTB's promotional activities in Canada is spiritual travel, in which the Reformation anniversary in 2017 plays a major role. Other themes that are used to target this particular market include German heritage, LGBT, active pursuits and affordable hospitality.

Germany was the **third** most popular European destination for Canadian travellers with **0.4 million trips** in 2014.

1st UK	4th FRANCE
2nd ITALY	5th SPAIN
3rd GERMANY	

Population: **35.1 million**
Per capita GDP: **US\$ 44,095**; biggest segment for travel to Germany: **holidays (78%)**

ISRAEL

The volume of overnight stays from Israel continues to grow strongly, with double-digit growth recorded in each of the past four years. The overall number has increased by 166 per cent since 2006. A total of 70 per cent of all Israelis visiting Germany are holidaymakers; around a quarter are business travellers.

In its marketing for Israel the GNTB focuses on the annual theme campaigns, Germany's positive image and its excellent value for money. In addition to this, the GNTB is intensifying its activities in the media and the trade. New emphasis is being placed on short breaks and family destinations.

Germany was the **second** most popular European destination for Israeli travellers with **0.3 million trips** in 2014.

1st FRANCE	4th UK/IRELAND
2nd GERMANY	5th GREECE/CYPRUS
3rd ITALY	

Population: **8.0 million**
Per capita GDP: **US\$ 36,663**; biggest segment for travel to Germany: **holidays (70%)**

Sources: population: CIA World Factbook; per capita GDP: Germany Trade & Invest (GTAI), 'Wirtschaftsdaten kompakt'; travel segments: GNTB/WTM, IPK 2014; Germany as a travel destination: GNTB/WTM, IPK 2014.



Luther memorial in Wittenberg, Saxony-Anhalt

TOP DESTINATIONS IN GERMANY / FEDERAL STATES

	1st	2nd	3rd
USA	Bavaria 28.8%*	Berlin 19.3%*	Hessen 14.2%*
BRAZIL	Berlin 32.9%*	Bavaria 26.7%*	Hessen 10.6%*
CANADA	Bavaria 28.6%*	Berlin 23.2%*	Hessen 11.8%*
ISRAEL	Berlin 46.8%*	Baden-Württemberg 25.4%*	Bavaria 11.9%*

2015 statistics / *Federal state's share of all overnight stays from the market concerned.

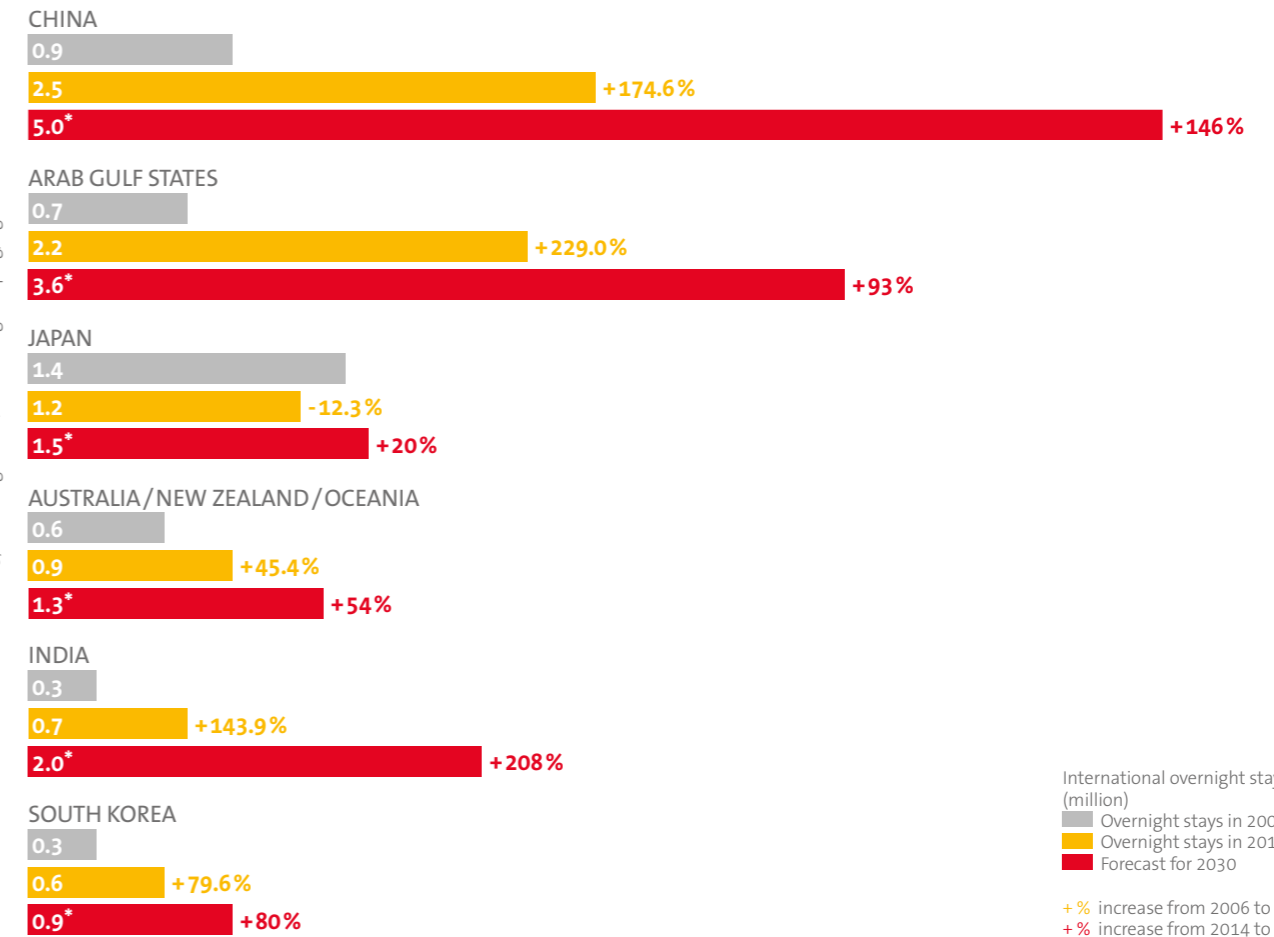
Source: Federal Statistical Office.

REGIONAL MANAGEMENT ASIA / PACIFIC

In 2015 the Asian markets consolidated their position as **drivers of growth** for global tourism. The German travel industry was among the beneficiaries of this development, generating an **increase of 13.4 per cent** from this region last year. **China** and the **Arab Gulf States** in particular delivered further **strong rises** to establish themselves as key source markets for inbound tourism to Germany. Going forward, high growth in tourism demand is also expected from other Asian markets such as South Korea, Taiwan and Indonesia.



Growth in the number of inbound overnight stays in Germany by visitors from Asia / Pacific up to 2030



CHINA

The source market China continues to display rapid growth and passed the 2.5 million mark in 2015. Over a ten-year period, the annual growth rate has been 12.3 per cent, with an increase in volume of 175 per cent. China is Germany's biggest source market in Asia and the eleventh largest overall. Alongside the annual themes, the GNTB focuses its marketing activities in China and Hong Kong on visits to cities that offer lifestyle appeal and shopping. Self-driving holidays are also popular with Chinese visitors, who are very big spenders and are by far the keenest tax-free shoppers. Rural areas are also in greater demand. The ever-widening travel experience of Chinese consumers and the increasing influence of new media, driven by the popularity of mobile internet, are fuelling demand for individually tailored holidays that offer high-quality tourism products.

Germany was the **no. 1 European destination** for Chinese visitors with **1.1 million trips** in 2014

1st GERMANY	4th ITALY
2nd FRANCE	5th SPAIN
3rd SWITZERLAND	

Population: 1,367.2 million
 Per capita GDP: US\$ 8,866; biggest segment for travel to Germany: holidays (64%)

ARAB GULF STATES

The GNTB covers six countries in the Gulf region from its Dubai office: Bahrain, Qatar, Kuwait, Saudi Arabia, Oman and the United Arab Emirates. As well as native Arab residents, a large number of expats live in the Gulf Cooperation Council nations. The growth rate for overnight stays from the Arab Gulf States is one of the strongest of the last ten years at an impressive 13.4 per cent. The main reasons for travel were holidays (75 per cent), with shopping playing an important role, and business (23 per cent). In addition to the traditional family holiday, there will be an increased marketing focus on young travellers going forward.

Germany was the **no. 1 European destination** for travellers from the **Gulf States*** with **0.5 million trips** in 2014

1st GERMANY	4th FRANCE
2nd UK	5th AUSTRIA
3rd TURKEY	

* Saudi Arabia, UAE, Kuwait.

Population: **37.7 million**
Per capita GDP: **Saudi Arabia US\$ 20,139, UAE US\$ 35,392, Kuwait US\$ 44,032;**
biggest segment for travel to Germany: **holidays (75%)**

AUSTRALIA/NEW ZEALAND/OCEANIA

From a long-term perspective, Australia is a growth market for inbound tourism to Germany: since 2004 its volume of overnight stays has more than doubled. Holidaymakers account for 90 per cent of all Australian travellers to Germany, with 38 per cent belonging to the 55-plus age group. Because of the wide array of European packages offered by Australian tour operators and because of Australia's strong economy it is realistic to expect continued growth in the volume of outbound travel in the Australian market over the coming years. There is potential for this market to be delivering 1.1 million overnight stays a year by 2030.

Germany was the **fourth most popular European destination** for **Australian** travellers with **0.1 million trips** in 2014

1st UK	4th GERMANY
2nd ITALY	5th SPAIN
3rd FRANCE	

Population: **22.8 million**
Per capita GDP: **US\$ 63,940;** biggest segment for travel to Germany: **holidays (90%)**

INDIA

Thanks to continuous growth, India has consolidated its position for inbound tourism to Germany among the Asian source markets. Strong growth of 6.6 per cent was recorded in 2015. Business trips account for 50 per cent of this market; holidays make up 40 per cent. Around 70 per cent of Indians book their trip to Germany online. Of the visitors to Germany from India, 60 per cent are male and have a high level of income and education. The average age is 36. More than half of Indians visiting Germany opt for multi-destination tours.

Germany was the **second most popular European destination** for **Indian** travellers with **0.3 million trips** in 2014

1st UK	4th TURKEY
2nd GERMANY	5th FRANCE
3rd SWITZERLAND	

Population: **1,251.7 million**
Per capita GDP: **US\$ 1,821;** biggest segment for travel to Germany: **business travel (50%)**

JAPAN/SOUTH KOREA

Although the traditionally strong Japanese source market is currently in decline, it remains in 16th place in the rankings for Destination Germany and in fourth place among the overseas markets. Parting with an average of €2,905 per trip to Germany (€528 a day), the Japanese are big spenders. City breaks are the most popular segment with a share of 47 per cent. At 37 per cent, the proportion of business travel from South Korea to Germany is above average. Multi-destination tours are the most popular type of holiday for South Koreans at 64 per cent. Looking ahead to the Reformation anniversary in 2017, spiritual travel is a key focus in marketing activities.

Germany was the **third most popular European destination** for **Japanese** travellers with **0.5 million trips** in 2014

1st FRANCE	4th SPAIN
2nd ITALY	5th UK
3rd GERMANY	

Population: **126.9 million**
Per capita GDP: **US\$ 32,486;** biggest segment for travel to Germany: **holidays (67%)**

Germany was the **third most popular European destination** for **South Korean** travellers with **0.2 million trips** in 2014

1st ITALY	4th AUSTRIA
2nd TURKEY	5th SWITZERLAND
3rd GERMANY	

Population: **49.1 million**
Per capita GDP: **US\$ 28,525;** biggest segment for travel to Germany: **holidays (59%)**



Losheim reservoir, Saarland – the backdrop for 'Classics at the Lake', one of the biggest open-air classical music events in south-west Germany

TOP DESTINATIONS IN GERMANY / FEDERAL STATES

	1st	2nd	3rd
CHINA	Bavaria 29.0%*	Hessen 19.4%*	Baden-Württemberg 14.9%*
ARAB GULF STATES	Bavaria 40.6%*	Hessen 16.8%*	Baden-Württemberg 12.6%*
JAPAN	Bavaria 30.6%*	Hessen 19.3%*	North Rhine-Westphalia 13.4%*
AUSTRALIA ¹⁾	Berlin 33.1%*	Bavaria 28.7%*	Hessen 8.7%*
INDIA	Baden-Württemberg 27.1%*	Bavaria 19.5%*	Hessen 19.5%*
SOUTH KOREA	Bavaria 34.4%*	Hessen 27.5%*	Berlin 11.0%*

1) Includes New Zealand and Oceania.

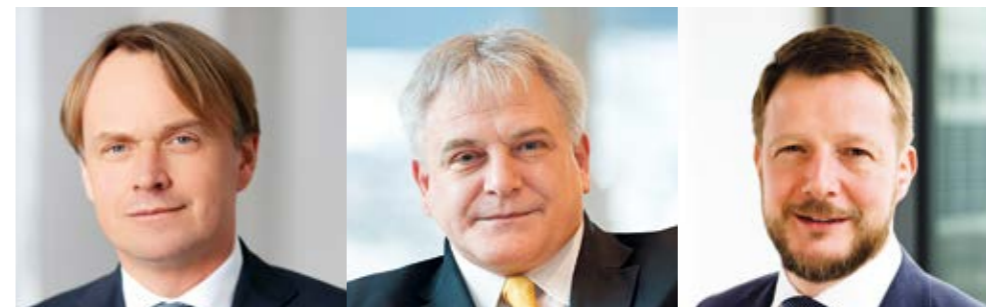
2015 statistics /*Federal state's share of all overnight stays from the market concerned.

Sources: population: CIA World Factbook; per capita GDP: Germany Trade & Invest (GTAI), "Wirtschaftsdaten kompakt"; travel segments: GNTB/WTM, IPK 2014; Germany as a travel destination: GNTB/WTM, IPK 2014.

Source: Federal Statistical Office.

GNTB partners look back at 2015 and talk about their current performance and forecasts

How would you and your organisation sum up **2015** in terms of **inbound tourism** compared with previous years? What **trends and challenges** do you anticipate for **2016**?



Richard Bader
Chairman of the Board of Management,
Europäische Reiseversicherung AG (ERV)

Klaus Henschel
Managing Director, Lufthansa City
Center International GmbH

Matthias Schultze
Managing Director,
GCB German Convention Bureau e.V.

SERVICES

Richard Bader, Europäische Reiseversicherung (ERV) The number of overnight stays in inbound tourism increased again in 2015. The figure was around 5 per cent higher than the record result we had in 2014 and it was the major cities and conurbations that delivered the highest growth. To cater to this trend, the ERV is pressing ahead with its strategy of internationalisation. ERV, because of its global presence, is in a position to provide insurance to travellers from all over the world. Last year brought challenges for the tourism industry and 2016 will be no different. The refugee crisis, the threat of terrorism, and the tense economic situation in many holiday destinations favoured by Germans will have an impact. It will be a year of overland travel for German travellers, in which people will increasingly opt for domestic holidays. The ERV also offers the appropriate travel cover for this.

The sharing economy and the digital revolution represent additional challenges for us. It is important that we

actively develop business opportunities and serve the needs of our increasingly tech-savvy customers.

Klaus Henschel, Lufthansa City Center International The inbound travel business is playing an ever bigger role for the partners of Lufthansa City Center. A large number of trips by foreign visitors to Germany can be attributed to the sales activities of our LCC network, which consists of 350 travel agencies around the world. The German LCC partners are among those that recognise that there is considerable business potential in inbound tourism and in collaborations that serve the needs of travellers. LCC is very well prepared to cater for this market segment and is improving all the time. Take, for example, our Global Incoming Network (GIN), which encompasses more than 40 LCC partners from around the world. GIN is an international marketplace, designed for individual travellers and groups, but also for the conference industry, i.e. for the MICE sector. Membership of the German National Tourist Board is important for Lufthansa City Center International, as it allows us to put our inbound travel business on an even broader international footing that will help us to grow long term.

MARKETING

Matthias Schultze, GCB German Convention Bureau In 2015 the German conference industry once again felt the benefit of the globalisation megatrend. According to Germany's meetings and events barometer, the proportion of international visitors at events in Germany increased to 7.1 per cent. This is a continuation of an ongoing trend. Between 2006 and 2015 the number of international visitors at events in Germany almost doubled, increasing from 14.3 to 27.7 million.

On the basis of in-depth analysis, the GCB has identified two key areas in the German conference sector that need to be addressed: internationalisation and digitisation. Both present opportunities and challenges.

For those involved in the industry, this means implementing appropriate measures in both areas so that they can benefit from these developments. Technology scouting and the sensible use of technology are high on the agenda in the field of digitisation. As for internationalisation, it is important to tap into and serve key source markets and to also meet the respective political and social challenges.

Armin Dellnitz, Magic Cities In 2015 Germany's Magic Cities alliance once again registered a significant rise in the number of overnight stays. The ten Magic Cities – Cologne, Dresden, Düsseldorf, Frankfurt,

Hamburg, Hannover, Leipzig, Munich, Nuremberg and Stuttgart – accounted for 27.3 per cent of all overnight stays by foreign visitors in Germany. This corresponds to an increase of 5.5 per cent compared with 2014.

The Magic Cities alliance has extended its marketing, media and sales activities to China, Brazil and the high-volume market of the USA. In order to raise the profile of the Magic Cities, the alliance is focusing on large-scale campaigns with online travel agencies, tour operators and bloggers, and on social media activities. The Chinese market delivered exceptional growth of 22.7 per cent. The US market expanded by 8.3 per cent, while the number of overnight stays from Brazil fell by 4.5 per cent year on year.

We expect the positive trend in overnight stays from the USA and, in particular, China to continue in 2016.

Claudia Schwarz, German UNESCO World Heritage Sites Association Following the successful UNESCO World Heritage campaign in 2014, Germany's World Heritage sites continued to benefit from the strength of the cultural tourism segment in 2015 and was able to record high visitor numbers.

In some respects, however, 2015 is a year that our global community can look back on with a sense of helplessness. Hardly a day went by without television reports showing war, terrorism and the destruction of mankind's cultural heritage, including our own sites.



Armin Dellnitz
Chief Executive Officer,
Magic Cities e.V.

Claudia Schwarz
Chair of the German UNESCO World
Heritage Sites Association

Wolfgang Bauer
Managing Director of
Holy AG – OUTLET CITY METZINGEN



Dr. Michael Frenzel
President of the Federal Association of
the German Tourism Industry (BTW)

Peter Siemering
Vice President of the
German Tourism Association (DTV)

In times like these, the fundamental principle of UNESCO – the protection and preservation of our common cultural heritage – can inspire people to explore their own cultural roots and to share these with people from different cultural backgrounds. I believe that we, as tourism professionals, should make it our mission in 2016 to join others in promoting a sense of responsibility and mutual respect.

thanks to our collaborations with tourism partners, our use of precisely targeted marketing tools and our superb portfolio of brands.

Going forward, we are looking to focus even more on revenue-generating services that are tailored to the needs of our non-EU customers. We also want to appeal more to independent travellers and also to families.

We are looking ahead to 2016 with confidence. Nonetheless it is essential for us to keep a close eye on the market and the travel patterns of our customers and to stay flexible so that we can respond quickly to fluctuations.

SHOPPING

Wolfgang Bauer, Outletcity Metzingen/Holy AG In terms of inbound tourism, 2015 was a very successful year for Outletcity Metzingen. The revenue that was generated by customers from our main source markets – China, South Korea, Switzerland, Russia, France and the Arab Gulf States – climbed by almost 45 per cent compared with last year. We registered particularly strong increases from the source markets of China and South Korea thanks to our outstanding portfolio of luxury brands that includes Prada, Gucci, Burberry, Armani, Tod's, Zegna, Moncler and Max Mara. There was also impressive growth in the number of customers from France and the Scandinavian countries.

Outletcity Metzingen is becoming ever more popular as a shopping destination for international customers

Dr. Michael Frenzel, Federal Association of the German Tourism Industry (BTW) The encouraging upward trend in the tourism industry continued last year. 2015 was another record year for travel. There were 1.184 billion international tourist arrivals worldwide and 1.67 billion days of private travel for Germans, both of which were record highs. This huge appetite for travel clearly benefited Germany. We only need look at the

TRADE ASSOCIATIONS AND ORGANISATIONS

record number of overnight stays, at 436 million, and another highly encouraging increase, by 5 per cent, in the number of international visitors. Tourism remains an important engine of growth for the German economy.

After record results in 2015, the German tourism industry is cautiously optimistic about the current year. The economic conditions – growth in real wages, low unemployment and further high levels of consumer confidence – are extremely positive. Although, figuratively speaking, not everyone was ready and waiting with their suitcases packed at the beginning of the year, we are confident that many will soon be booking a trip. With that in mind, the BTW forecasts continued moderate growth for 2016. Germany, in particular, is very well positioned as a travel destination and could also benefit from travellers being more security-conscious this year. Besides the issue of security, we believe there are two major challenges in 2016: The first is the digital revolution, and in particular the urgent requirement for a level playing field between the old and new economies, including with regard to the sharing economy. Secondly, we need to cope with the influx of refugees and focus on the question of whether and how those seeking help can be integrated into society and into the job market.

Peter Siemering, German Tourism Association (DTV) Dark clouds obscured the blue skies of the travel industry in 2015. The refugee crisis, hostility towards foreigners and aggressive attacks overshadowed

Germany's positive image as a holiday destination and small cracks started to emerge. On top of that, there were air and rail strikes. Nonetheless it was a record year: 436 million overnight stays overall and more overnight stays by international visitors than ever before. We are looking ahead to 2016 with cautious optimism. It is more important than ever for us to use the positive energy that can be generated through tourism. The tourism industry is a reflection of the cosmopolitan and welcoming side to Germany. It plays a part in preventing divisions in our society. Many years of integration lie ahead of us – culture will be a decisive factor in this. One of Germany's strengths is its wealth of cultural treasures, which we can showcase to all those who come here. Germany is the no. 1 cultural travel destination for Europeans. Culture attracts people to our country. While this has brought nothing but success to many towns and cities, some rural regions have not yet reached their potential in this regard. We will be looking at three regions in particular in 2016 as part of a project, funded by the Federal Ministry for Economic Affairs and Energy, entitled 'The Destination as the stage: how does cultural tourism bring success to rural areas?'. We also see further challenges in the areas of digitisation, the sharing economy and EU framework conditions. We, as an umbrella organisation, want to continue providing our members with the best possible service and support for these and other challenges.

ADMINISTRATION

In 2015 the administrative functions of the GNTB were organised in a way that ensured the **appropriate planning and development of human resources**. Further developments were made to IT systems as planned. The situation in terms of income and expenditure developed in accordance with the **financial plan**.

FINANCIAL MANAGEMENT

Income from services increased again in 2015. Personnel costs increased due to collectively agreed pay rises, although they remained well below the figure budgeted for in the business plan. Other operating expenses also fell compared with the previous year. All of the savings achieved relative to the business plan were used to increase expenditure on marketing. The Federal Ministry for Economic Affairs and Energy (BMWi) increased the GNTB's grant so that it could expand its marketing activities in new markets and extend the scope of its digital activities.

In doing this, the ministry underlined how important it is to promote the economy and to secure jobs in the tourism industry. Ongoing cost discipline, a review and streamlining of the product portfolio – primarily in relation to trade fair activities and online advertising – and the steadily increasing involvement of tourism partners meant that the financial resources available for global marketing could be increased significantly in 2015. This also made it possible to extend the international network for promoting Destination Germany.

Income

The GNTB's operating results showed yet another improvement in 2015. The income from services increased by €180 thousand (up by 2.5 per cent) to €7.468 million. This stable income combined with the rise in the GNTB's grant caused the total budget to rise by €2.4 million to €36.9 million, a year-on-year increase of 6.6 per cent.

Income from grants and contributions went up by 5.8 per cent to €775 thousand. Non-cash contributions from our tourism partners held steady at €1.2 million.

Expenditure

The rise in income, the increase in federal grants and savings on other expenditure led to an increase of marketing spend of around €2.0 million (up by 8.8 per cent), which represents a new record high. The non-cash contributions from tourism partners in 2015, which amounted to €1.2 million, were used for additional marketing spend.

Capital investment of €0.3 million held steady compared with the previous year, whereas other operating expenses dropped to €2.849 million.

GNTB FINANCIAL OVERVIEW: SOURCES AND APPROPRIATION OF FUNDS

Income	2015 € '000	%	2014 € '000	%	2013 € '000	%	2012 € '000	%	2011 € '000	%	2010 € '000	%	2009 € '000	%
Income from services	7,468	19.3	7,288	20.1	7,320	20.2	6,041	17.5	6,717	18.7	7,381	20.3	7,572	21.2
Grants from the BMWi	30,508	78.7	28,302	77.9	28,273	78.0	27,713	80.5	27,040	75.3	26,622	73.1	25,640	71.8
Grants from the federal states	0	0.0	0	0.0	0	0.0	0	0.0	1,473	4.1	1,790	4.9	1,790	5.0
Grants and contributions from members	775	2.0	733	2.0	649	1.8	684	2.0	664	1.8	633	1.7	718	2.0
Income from GNTB budget¹⁾	38,752	100.0	36,323	100.0	36,242	100.0	34,438	100.0	35,894	100.0	36,426	100.0	35,720	100.0
Income from special projects ²⁾	109		121		352		117		523		387		988	
Total income (consolidated)	38,860		36,444		36,594		34,555		36,417		36,813		36,708	

Expenditure	2015 € '000	%	2014 € '000	%	2013 € '000	%	2012 € '000	%	2011 € '000	%	2010 € '000	%	2009 € '000	%
Personnel expenditure for marketing and administration	11,094	28.6	10,625	29.3	10,420	28.8	10,201	29.6	10,292	28.7	10,130	27.8	10,244	28.7
Other operating expenses	2,849	7.4	2,868	7.9	2,700	7.4	3,252	9.4	2,955	8.2	3,395	9.3	2,919	8.2
Capital investment	305	0.8	314	0.9	502	1.4	40	0.1	102	0.3	563	1.5	226	0.6
Marketing costs	24,503	63.2	22,516	62.0	22,620	62.4	20,945	60.8	22,545	62.8	22,338	61.3	22,331	62.5
Expenditure from GNTB budget¹⁾	38,751	100.0	36,323	100.0	36,242	100.0	34,438	100.0	35,894	100.0	36,426	100.0	35,720	100.0
Expenditure on special projects ²⁾	109		121		352		117		523		387		988	
Total expenditure (consolidated)	38,860		36,444		36,594		34,555		36,417		36,813		36,708	

1) Some of the total amounts may contain a rounding difference of €1,000.

2) Project funding and externally funded projects.

Personnel costs increased to €11.0 million (increase of 4.4 per cent) because of collectively agreed salary increases and the expansion of the Beijing office into a foreign representative office.

Outlook for 2016

The digitisation of finance-related processes will continue to be a focus for the GNTB in 2016. The increase

in areas of responsibility (reporting and monitoring) and continued scarcity of personnel resources are driving efforts towards the digitisation of business processes. The principles of sustainability (paperless office) and the development of a lean and efficient administration system are key to this approach. Alongside the expansion of electronic processes, the roll-out of fully electronic purchase invoice management is planned for 2016.

INFORMATION TECHNOLOGY

During the first two quarters of 2015, the GNTB's IT department focused on consolidating the existing WAN infrastructure. The provision of MPLS links to the foreign representative offices and the network connection of the head office in Frankfurt were put out to tender.

Further progress was made in the procurement and establishment of the GNTB's own IP address range. This address range is permanently assigned to the GNTB and can be used independently of the internet provider, meaning the problems and costs associated with changing internet provider no longer occur.

With the server landscape at head office having been reconfigured at the end of 2014 we were able to start moving the GNTB's website from an external hosting provider to our own servers. From the third quarter of

2015 onwards we were able to commence the complete IT outfit of the new foreign representative office opened in October in Beijing. Once the equipment had been procured, it was installed and configured on site.

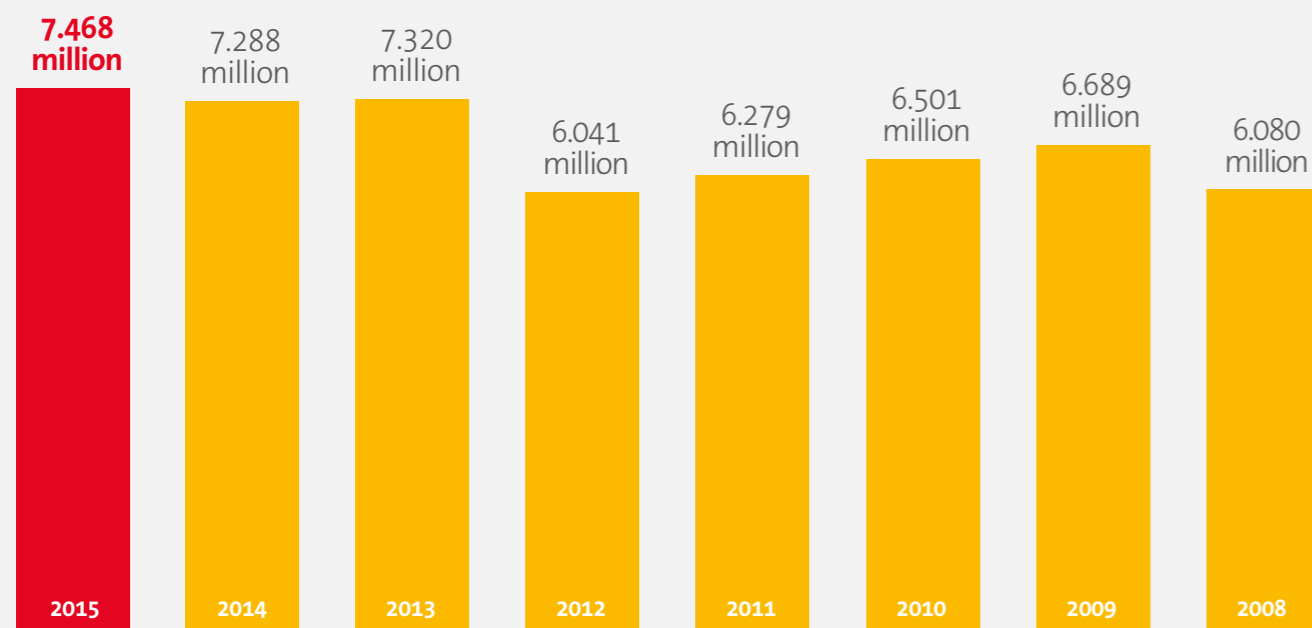
LOGISTICS

The GNTB's logistics and distribution department delivers brochures and other promotional items to the 30 foreign representative offices and sales and marketing agencies. It also supplies materials for trade fairs, workshops and roadshows that take place in the destination markets.

As a consequence of digitisation, customer demand for print products decreased significantly last year. The quantities ordered for partner publications dropped from what had been a print run in the millions in earlier years to only around 250,000 in 2015. As the amount of

INCOME FROM INTERNATIONAL MARKETING SERVICES

€7.5 million
Income from services



BREAKDOWN OF EXPENDITURE IN 2015

90.5 %
marketing costs
(direct and indirect)

2015	90.5 %
2014	90.3 %
2013	90.8 %
2012	90.2 %
2011	89.8 %



9.5 %
administrative costs

2015	9.5 %
2014	9.7 %
2013	9.2 %
2012	9.8 %
2011	10.2 %

work and expense involved with the administration and distribution of printed material is now disproportionately high in relation to the dwindling demand, it was decided in 2015 to substantially reduce the publication of traditional print products.

Outlook for 2016

In light of the current market trend, we will no longer distribute partner publications as a matter of course.

Only ad-hoc distribution of printed material at trade fairs, roadshows, workshops and press conferences etc. will be continued.

HUMAN RESOURCES

The GNTB employment plan for 2015 covered 150.1 positions. Of this total, 72.1 are at head office, 76 are based abroad, and there are two executive positions. The increase in the number of positions is due to the successful expansion of the sales and marketing agency in Beijing into an independent foreign representative office staffed by GNTB personnel.

There are also apprentices in years one, two and three of their apprenticeships at head office and several dozen interns working in Germany and abroad.

We would like to thank all our employees for their hard work. Without the dedication of its employees, the GNTB's themes, tasks and projects could not have been implemented at the same high level of quality and excellence.

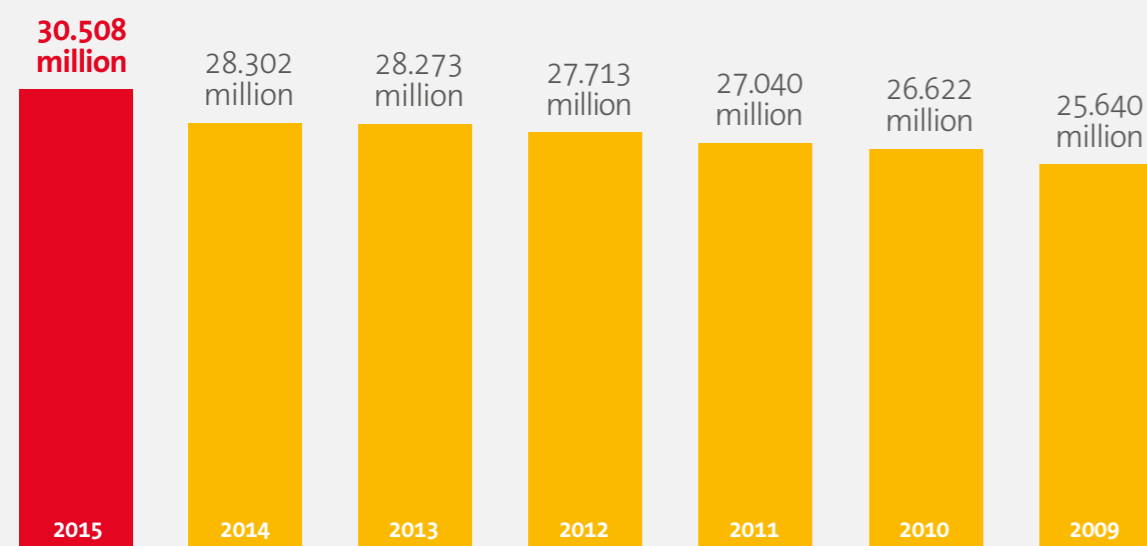
Success for the next generation of travel professionals

The GNTB is currently training a total of 14 apprentices in two professions: eight of them are working towards a leisure and tourism qualification and six towards a tourism qualification focused on private and business travel.

The GNTB apprentices spend time in all relevant departments at head office in Frankfurt and gain additional experience during various work placements, for example in one of the GNTB's European representative offices, with a tour operator or at a tourist information office. This provides them with a wealth of expertise and social skills to take into their future career in tourism. Because the GNTB offers more training places than are needed to meet its own staffing requirements, some of these young people will move on to other companies in the German travel industry after completing their apprenticeship or will enrol in courses of further study. The broad scope of the GNTB apprenticeship helps its apprentices to achieve very good exam results, giving them an excellent start in the industry.

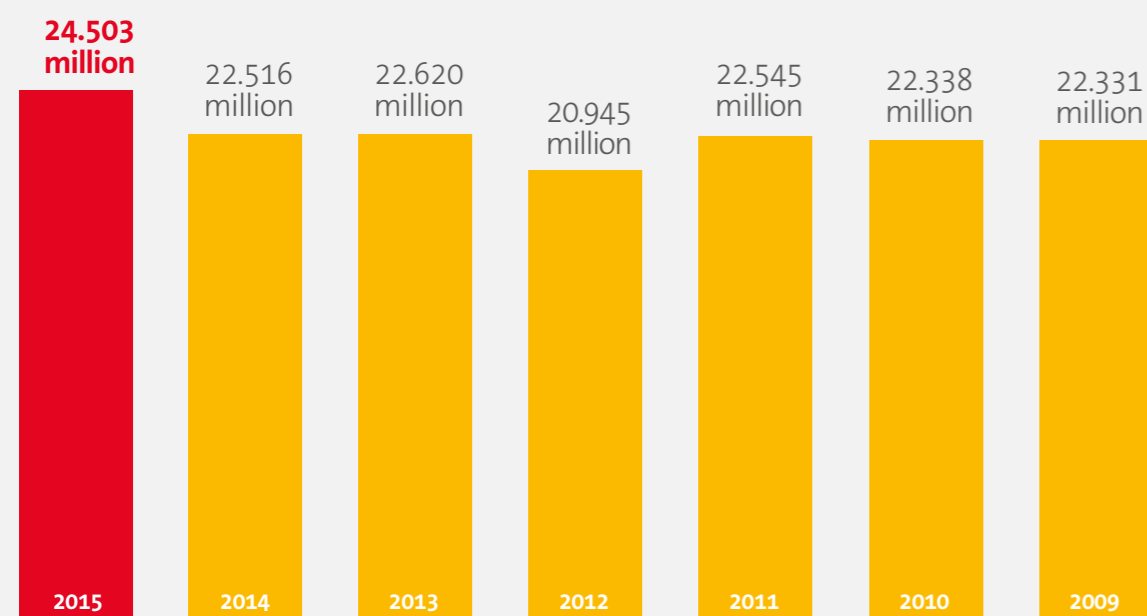
GRANTS FROM THE FEDERAL MINISTRY FOR ECONOMIC AFFAIRS AND ENERGY

€30.5 million
in federal grants



MARKETING COSTS

€24.5 million
spent on marketing*



* The amounts for 2009 to 2011 include the costs attributable to domestic marketing, which was discontinued in 2012.

Trainee programme for university graduates

The GNTB also develops young talent through an inhouse trainee programme. In 2015 university graduates gained their first professional experience at the GNTB on their way to becoming the managers and tourism experts of the future. The modular programme helps the trainees to develop and provides them with all the skills they need to take up a permanent position at the GNTB, either in Germany or abroad, or with another organisation in the tourism industry. The GNTB gave permanent contracts to five trainees from the 2014/15 cohort on conclusion of their training.

Internships for students

The GNTB also helps to nurture young talent by providing internships for university students. During their mandatory placements lasting several months, students can obtain professional experience at the head office in Frankfurt or in many of the foreign representative offices and sales and marketing agencies, taking advantage of the GNTB's international network. The interns spend time in all marketing departments, gaining hands-on experience of the work of an international marketing organisation. Involvement in projects at home and

abroad gives the interns an in-depth insight into tourism work in the field of destination management.

Skills upgrading and training

Constant market changes, management innovations and new tools for tourism marketing all require ongoing training. As in previous years, the GNTB ran training courses in 2015 to equip its employees for the challenges ahead. Employees were able to attend training courses and seminars at the Frankfurt head office and in the foreign representative offices.

The options available ranged from seminars and method training to specialist courses on subjects such as new trends and new media and the latest aspects of social media marketing. These were complemented by personal development courses focusing on subjects such as public speaking.

The aim of all training measures is to equip employees with the necessary skills to meet current and future requirements.



GNTB trainees at the 2016 GTM in Magdeburg

MEMBERS OF THE GNTB BOARD OF DIRECTORS (as at June 2016)

elected at the 117th general meeting on 11 December 2014

PRESIDENT



Klaus Laepple,
President of the GNTB Board of Directors

VICE PRESIDENTS



Ilse Aigner, Bavarian State Minister of Economic Affairs and Media, Energy and Technology



Ernst Fischer, President of the German Hotel and Restaurant Association (DEHOGA)



Peter Siemering, Vice President of the German Tourism Association (DTV)

OTHER ELECTED MEMBERS



Dietrich von Albedyll,
until 1 March 2016



Jens Bischof, Board Member Responsible for Sales, Marketing and Product, Passenger Business, Lufthansa



Birgit Bohle, Chief Executive Officer, DB Fernverkehr AG



Armin Dellnitz, Chief Executive Officer, Magic Cities Germany e.V.



Richard Eberhardt, President, RDA International Coach Tourism Federation



Thomas Ellerbeck, Member of the Group Executive Committee, TUI Group



Norbert Fiebig, President, German Travel Association (DRV)



Dr Monika Gommolla, Chairperson of the Supervisory Board, MARITIM Hotelgesellschaft mbH



Dr Christian Göke, Chief Executive Officer, Messe Berlin GmbH



Ernst Hinsken, President, German Spa Association (until 1 February 2015)



Andreas von Puttkamer, Head of the Aviation Division, Flughafen München GmbH



Regine Sixt, Senior Executive Vice President SIXT International, SIXT SE

MINISTERIAL REPRESENTATIVES



Dagmar Rothacher, Director in charge of Subdepartment VII D, Working Group for Matters of the New Federal States
Federal Ministry for Economic Affairs and Energy (BMWi)



Bernd Hoepner, Ministerial Counsellor, Head of Department II C 1, Federal Ministry of Finance
until 30 June 2016

INVITED MEMBERS



Iris Gleicke, Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy
Federal Government
Commissioner for SMEs, Tourism and the New Federal States



Dr Marion Weber, Ministerial Counsellor, Head of Department VII A 4-Tourism Policy
Federal Ministry for Economic Affairs and Energy (BMWi)

MEMBERS OF THE GNTB ADVISORY BOARD (as at June 2016)

elected at the 117th general meeting on 11 December 2014

CHAIRMAN

Ernst Fischer, President, German Hotel and Restaurant Association (DEHOGA)

FIRST DEPUTY CHAIRMAN

Burkhard Kieker, Managing Director, Berlin Tourismus & Kongress GmbH

SECOND DEPUTY CHAIRMAN

Walter Krombach, Managing Director, Willy Scharnow Foundation for Tourism

OTHER ELECTED MEMBERS

Dr Martin Buck, Director of the Travel & Logistics Competence Center, Messe Berlin GmbH

Professor Rudolf Forcher, Committee Chairman for Social Law, German Spa Association (DHV)

Dr Michael Kerkloh, Chief Executive Officer, Flughafen München GmbH

Martin Katz, Group Destination Director, Hotel-only Holidays, FTI Touristik GmbH

Dr Roland Mack, Managing Partner, Europa-Park GmbH & Co – Mack KG

Dr August Ortmeier, Head of Department for Services, Infrastructure and Regional Policy, Association of German Chambers of Industry and Commerce (DIHK), until 31 December 2015

EX OFFICIO MEMBERS

Ministerial Counsellor Wolfgang Eckart, Head of Department G 10, Federal Ministry of Transport and Digital Infrastructure

Dr Dirk Rotenberg, Head of Department 405 (Transport, Research, Innovation and Tourism Policy), Federal Foreign Office

Dr Heinrich Neumann, Head of Department for Finance, Economics and Infrastructure, Press and Information Office of the Federal Government

FEDERAL STATE REPRESENTATIVES 16 representatives of the ministers (senators) responsible for tourism in the federal states (as at June 2016)

BADEN-WÜRTTEMBERG
Ministerial Counsellor Fred-Jürgen Stradinger, Ministry of Justice and European Affairs, Baden-Württemberg

BAVARIA
Ministerial Counsellor Dr Otto Ziegler, Bavarian Ministry of State for Economic Affairs and Media, Energy and Technology

BERLIN
Dr Dietrich Kalkum, Senate Office for Economics, Technology and Research

BRANDENBURG
Ministerial Counsellor Martin Linsen, Ministry for Economics and European Affairs

BREMEN
Dr Christel Lübben, Senator for the Economy, Labour and Ports of the Federal State of Bremen

FREE HANSEATIC CITY OF HAMBURG
Bernd Meyer, Office of Economics, Transport and Innovation, Department of North German Cooperation, Tourism & Marketing

HESSEN
Ministerial Counsellor Ulrike Franz-Stöcker, Hessen Ministry of Economics, Energy, Transportation, Urban and Regional Development

MECKLENBURG-WESTERN POMERANIA
Gerd Lange, Ministry for Economics, Building and Tourism

LOWER SAXONY
May-Britt Pürschel, Lower Saxony Ministry for Economics, Labour and Transport

NORTH RHINE-WESTPHALIA
Frank Butenhoff, Ministry for Economic Affairs, Energy, Industry, SMEs and Skilled Trade

RHINELAND-PALATINATE
Beate Schrader, Ministry for Economy, Transport, Agriculture and Viticulture

SAARLAND
Administrative Director Dr Rainer Schryen Saarland Ministry for Economics, Labour, Energy and Transport

SAXONY
Ministerial Counsellor Frank Ortmann, Saxon State Ministry for Economic Affairs, Labour and Transport

SAXONY-ANHALT
Andreas Höfflin, Ministry of Economy, Science and Digitalisation

SCHLESWIG-HOLSTEIN
Ministerial Counsellor Kerstin Ehlers, Ministry for Economics, Labour, Transport and Technology of the State of Schleswig-Holstein

THURINGIA

Ministerial Counsellor Kerstin Friese, Thuringia Ministry of Economics, Science and Digital Society

GNTB SPONSORS

There are currently 14 GNTB sponsors

MEMBERS OF THE GNTB INTERNATIONAL MARKETING COMMITTEE

(as at June 2016)

elected at the 117th general meeting on 11 December 2014

ELECTED MEMBERS

Dr Bettina Bunge, Managing Director,
Dresden Marketing GmbH

Yvonne Coulin, General Manager,
Congress- und Tourismus-Zentrale Nürnberg
Verkehrsverein Nürnberg e.V.

Thomas Feda, Managing Director,
Tourismus+Congress GmbH
Frankfurt am Main

Geraldine Knudson, Director of the
Department for Work and the Economy –
München Tourismus

REGIONAL MARKETING ORGANISATIONS

BERLIN

Burkhard Kieker, Managing Director,
Berlin Tourismus & Kongress GmbH

BREMEN

Peter Siemering, Managing Director,
Bremer Touristik Zentrale Gesellschaft
für Marketing und Service mbH

MECKLENBURG-WESTERN POMERANIA

Bernd Fischer, Managing Director,
Tourismusverband Mecklenburg-
Vorpommern e.V.

LOWER SAXONY

Carolin Ruh, Managing Director,
Tourismus Marketing Niedersachsen GmbH

NORTH RHINE-WESTPHALIA

Dr Heike Döll-König, Managing Director,
Tourismus NRW e.V.

SAARLAND

Birgit Grauvogel, Managing Director,
Tourismus Zentrale Saarland GmbH

SCHLESWIG-HOLSTEIN

Uwe Wanger, Managing Director,
Tourismus-Agentur Schleswig-Holstein GmbH

THURINGIA

Bärbel Grönegres, Managing Director,
Thüringer Tourismus GmbH

EX OFFICIO MEMBERS The 57 tourism companies and associations that are members of the GNTB

ACCOR HOTELLERIE DEUTSCHLAND GMBH
Catja Dose, Trade and Marketing Manager

AIR BERLIN GMBH & CO.
LUFTVERKEHRS KG
André Rahn, Senior Vice President of Marketing

ALLGEMEINER DEUTSCHER FAHRRAD-CLUB
E.V. (ADFC) (German Cyclists' Federation)
Burkhard Stork, National Executive Officer

AMADEUS GERMANY GMBH
Brigitte Löhl, Head of
Business Development

AUTOSTADT GMBH
Otto-Ferdinand Wachs,
Managing Director

AVIS AUTOVERMIETUNG GMBH & CO. KG
Klaus Tusche, Commercial Director for
Germany, Switzerland, Austria & Czech
Republic

BEST WESTERN HOTELS
DEUTSCHLAND GMBH
Marcus Smola, Managing Director

BUNDESVERBAND DER DEUTSCHEN
TOURISMUSWIRTSCHAFT E.V. (BTW)
(Federal Association of the German
Tourism Industry)
Michael Rabe, General Secretary

DB VERTRIEB GMBH
Dr Tobias Heußler,
Head of International Sales

DER TOURISTIK GMBH
Werner Sülberg, Head of Strategy
and Market Research

DEUTSCHE LUFTHANSA AG
tba

DEUTSCHER HEILBÄDERVERBAND E.V. (DHV)
(German Spa Association)
Uwe Strunk, Managing Director

DEUTSCHER HOTEL- UND
GASTSTÄTTENVERBAND E.V. (DEHOGA)
(German Hotel and Restaurant Association)
Ernst Fischer, President

DEUTSCHER INDUSTRIE- UND
HANDELSKAMMERTAG E.V. (DIHK)
(Association of German Chambers of Industry
and Commerce)
Ulrike Regele, Head of Trade and Tourism

DEUTSCHER REISEVERBAND E.V. (DRV)
(German Travel Association)
Dirk Inger, Chief Executive Officer

DEUTSCHER TOURISMUSVERBAND E.V. (DTV)
(German Tourism Association)
Claudia Gilles, Chief Executive Officer

DEUTSCHES WEININSTITUT GMBH (DWI)
(German Wine Institute)
Monika Reule, Managing Director

DEUTSCHES JUGENDHERBERGSWERK /
HAUPTVERBAND (German Youth Hostel
Association/Central Association)
Bernd Dohn, Chief Executive Officer

EUROPÄISCHE REISEVERSICHERUNG AG
Hans Stadler, ERV Tourism Sales Manager

EUROPA-PARK GMBH & CO MACK KG
Linda Rospleszcz, Sales Manager
International Tourism

FLUGHAFEN DÜSSELDORF GMBH
Eckhard Mischke, Head of
Consumer Marketing

EX OFFICIO MEMBERS (continued)

FLUGHAFEN MÜNCHEN GMBH
Andreas von Puttkamer, Head of
the Aviation Division

FRAPORT AG
Susanne D. Schick, Senior Manager
for Sales & Customer Support

FRIEDRICHSTADT-PALAST BERLIN
Thomas Schwemin, Head of Sales

GALERIA KAUFHOF GMBH
Jens Bahlmann, Head of Sales Coordination

GERMAN CONVENTION BUREAU E.V. (GCB)
Matthias Schultze, Managing Director

GERMANIA FLUGGESELLSCHAFT MBH
Vicky Kramer, Marketing Director

GLOBAL BLUE DEUTSCHLAND GMBH
Michael Mauerhoff, Marketing Sales Manager

GOETHE-INSTITUT E.V.
Kay Hug, Head of Sales and Marketing

GRAND CITY HOTELS & RESORTS GMBH
Bart Beerens, Vice President for
Commercial Operations

HANSE MERKUR REISEVERSICHERUNG AG
Susanne Löbkens, Sales Director

HISTORIC HIGHLIGHTS OF GERMANY E.V.
Hans-Albert Becker, Chairman

HOTELVERBAND DEUTSCHLAND (IHA) E.V.
(German Hotel Association)
Markus Luthe, Chief Executive Officer

LINDNER HOTELS AG
Ulrich Pfeiffer, Sales Director

LUFTHANSA CITY CENTER
INTERNATIONAL GMBH
Klaus Henschel, Managing Director

MAGIC CITIES GERMANY E.V.
Dorothea Niester, Managing Director

MARITIM HOTELGESELLSCHAFT MBH
René Halla, Global Sales Director

McArthurGlen MANAGEMENT GMBH
Matthias Sinner, Regional Travel Marketing
Manager for Northern Europe

MEINFERNBUS FLIXBUS
Kay Manazon, Marketing and
Sales Manager

MESSE BERLIN GMBH
Dr Martin Buck, Director of the Travel &
Logistics Competence Center

NH HOTELES DEUTSCHLAND GMBH
Andreas Harzer, Regional Operations
Director Central Europe

OUTLET-CITY METZINGEN HOLY AG
Wolfgang Bauer, Managing Director

RDA INTERNATIONALER BUSTOURISTIK
VERBAND E.V. (RDA International Coach
Tourism Federation)
Richard Eberhardt, Chief Executive Officer

REISE MISSION GMBH
Günter Grünwald, Managing Director

RELAIS & CHATEAUX ASSOCIATION
Nicholas Frehse, Delegation
Coordinator for Germany

RINGHOTELS E.V. AND
RINGHOTELS SERVICE GMBH
Susanne Weiss, Chief Executive Officer

ROMANTIK HOTELS & RESTAURANTS AG
Marie-Sophie Zunino, Marketing Director

SIXT GMBH & CO. AUTOVERMIETUNG KG
Carsten Anhalt, Vice President
for International Sales

STAATLICHE PORZELLAN-
MANUFAKTUR MEISSEN GMBH
Kathrin Kretzschmar, Head of Tourism
Marketing & Visitor Services

STAGE ENTERTAINMENT
MARKETING & SALES GMBH
Sven-Thorsten Prah, Senior International
Sales Manager

STEIGENBERGER HOTELS AG
Marcus Bader, Head of Corporate
Branding and Marketing

THOMAS COOK AG
Heidrun Steidle, Head of Category
Management – City & Domestic Travel

TUI DEUTSCHLAND GMBH
Matthias Gehring, Vice President
Product Management Moduler

UNESCO-WELTERBESTÄTTEN DEUTSCHLAND
E.V. (German UNESCO World Heritage Sites
Association)
Claudia Schwarz, Chairperson

VALUE RETAIL MANAGEMENT
GERMANY GMBH
John T. Quinn, Head of Operations, Germany

WELLNESS-HOTELS-DEUTSCHLAND GMBH
Michael Altewischer, Managing Director

WILLY SCHARNOW-STIFTUNG FÜR TOURISTIK
(Willy Scharnow Tourism Foundation)
Walter Krombach, Managing Director

ADDRESSES OF GNTB REGIONAL MANAGEMENT OFFICES

REGIONAL MANAGEMENT NORTH WEST EUROPE

NETHERLANDS GNTB foreign representative office Netherlands Haaksbergweg 51 1101 BR Amsterdam Michaela Klare michaela.klare@germany.travel Tel: +31 (0)20 311 3921	BELGIUM/LUXEMBOURG GNTB foreign representative office Belgium/ Luxembourg Gulledele 93 1200 Brussels Jürgen Lettau juergen.lettau@germany.travel Tel: +32 (0)22 404 581	UNITED KINGDOM/IRELAND GNTB foreign representative office United Kingdom/Ireland 60 Buckingham Palace Road London, SW1W 0AH Klaus Lohmann klaus.lohmann@germany.travel Tel: +44 (0)20 7317 0912
---	--	--

REGIONAL MANAGEMENT NORTH EAST EUROPE / RUSSIA

DENMARK GNTB foreign representative office Denmark Amaliegade 13 1256 Copenhagen Bo Lauridsen bo.lauridsen@germany.travel Tel: +45 (0)33 436 818	SWEDEN GNTB sales and marketing agency Sweden c/o Deutsch-Schwedische Handelskammer Box 10147 110055 Stockholm Iris Müller iris.mueller@germany.travel Tel: +46 (0)86 651 884	NORWAY GNTB sales and marketing agency Norway c/o New Horizons Riplegården 9 5161 Bergen Sabine Koch sabine.koch@germany.travel Tel: +47 (0)48 341 105
POLAND GNTB sales and marketing agency Poland c/o Deutsch-Polnische Industrie- und Handelskammer ul. Miodowa 14 00-246 Warsaw Tomasz Pędzik tomasz.pedzik@germany.travel Tel: +48 (0)22 531 0528	RUSSIA GNTB sales and marketing agency Russia c/o Pro-Mark Company Leninsky prospekt 113/1, office 706c 117 198 Moscow Alla Belikova alla.belikova@germany.travel Tel: +7 (0)495 281 5125	FINLAND Marketing through Valve Communications Oy and Redland Oy Bo Lauridsen, GNTB Denmark bo.lauridsen@germany.travel Tel: +45 (0)33 436 818

REGIONAL MANAGEMENT SOUTH WEST EUROPE

FRANCE GNTB foreign representative office France 8, rue de Milan 75000 Paris Beatrix Haun beatrix.haun@germany.travel Tel: +33 (0)140 200 507	ITALY GNTB foreign representative office Italy Foro Buonaparte 12 20121 Milan Ulrich Rüter ulrich.rueter@germany.travel Tel: +39 (0)2 0066 7791	SWITZERLAND GNTB foreign representative office Switzerland Freischützgasse 3 8004 Zurich Harald Henning harald.henning@germany.travel Tel: +41 (0)4 4213 2211
SPAIN/PORTUGAL GNTB foreign representative office Spain/ Portugal c/ San Augustin 2-1º derecha Plaza de las Cortes 28014 Madrid Ulrike Bohnet ulrike.bohnet@germany.travel Tel: +34 (0)9 1360 0393		

REGIONAL MANAGEMENT SOUTH EAST EUROPE

BOSNIA AND HERZEGOVINA, BULGARIA, CROATIA, MONTENEGRO, ROMANIA AND SERBIA GNTB sales and marketing agency Balkans c/o Danube Competence Center (DCC) Regionalbüro Knez Mihailova 9 11000 Belgrade Boris Čamernik boris.camernik@danubecc.org Tel: +381 (0)11 655 7115	AUSTRIA AND SLOVAKIA GNTB foreign representative office Austria and Slovakia Mariahilfer Strasse 54 1070 Vienna László Dernovics laszlo.dernovics@germany.travel Tel: +43 (0)1 5132 79210	SLOVENIA GNTB sales and marketing agency Slovenia c/o Deutsch-Slowenische Industrie- und Handelskammer Poljanski nasip 6 1000 Ljubljana Maja Horvat maja.horvat@germany.travel Tel: +386 (0)1 252 8855	CZECH REPUBLIC GNTB sales and marketing agency Czech Republic c/o Deutsch-Tschechische Industrie- und Handelskammer Václavské náměstí 40 Stepanska 65, 110 00 Prague Karel Zelený karel.zeleny@germany.travel Tel: +420 (0)2 2149 0374	HUNGARY GNTB sales and marketing agency Hungary c/o Deutsch-Ungarische Industrie- und Handelskammer Lóvhoház utca 30 H-1024 Budapest Miklós Czeiszng miklos.czeiszng@germany.travel Tel: +36 (0)13 457 633
---	--	---	--	---

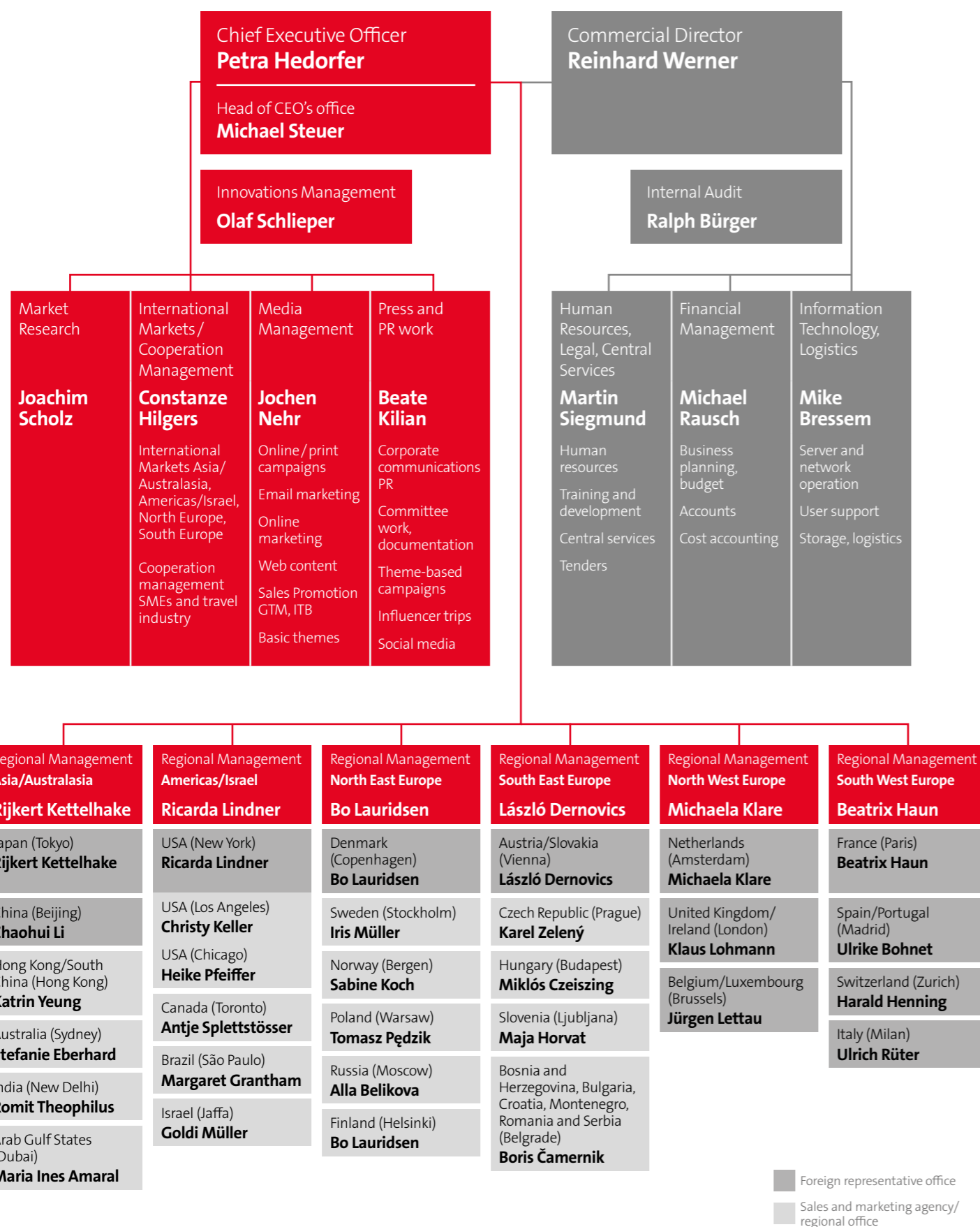
REGIONAL MANAGEMENT AMERICAS / ISRAEL

BRAZIL GNTB sales and marketing agency Brazil c/o Deutsch-Brasilianische Industrie- und Handelskammer Rua Verbo Divino 1488 – 3º andar 04719-904 São Paulo Margaret Grantham margaret.grantham@germany.travel Tel: +55 (0)11 5187 5168	ISRAEL GNTB sales and marketing agency Israel c/o Lufthansa German Airlines 37, She'erit Israel Street 68165 Tel Aviv-Yafo Goldi Müller goldi.mueller@germany.travel Tel: +972 (0)35 135 306	CANADA GNTB sales and marketing agency Canada c/o VoX International Inc 2 Bloor Street West, Suite 2601 Toronto, ON, M4W 3E2 Antje Splettstösser antje.splettstoesser@germany.travel Tel: +1 (0)416 935 1896 ext. 224
USA/CHICAGO GNTB sales and marketing agency Chicago c/o Myriad Marketing P.O. Box 59594 Chicago, IL 60659-9594 Heike Pfeiffer heike.pfeiffer@germany.travel Tel: +1 (0)773 539 6303	USA/LOS ANGELES GNTB sales and marketing agency Los Angeles c/o Myriad Marketing 6033 W. Century Blvd. #900 Los Angeles, CA 90045 Christy Keller christy.keller@germany.travel Tel: +1 (0)310 648 7711	USA/NEW YORK GNTB foreign representative office New York 122 East 42nd Street, Suite 2000 New York, N.Y. 10168-0073 Ricarda Lindner ricarda.lindner@germany.travel Tel: +1 (0)212 661 7858

REGIONAL MANAGEMENT ASIA / AUSTRALASIA

AUSTRALIA GNTB sales and marketing agency Australia c/o Gate 7 Pty Ltd Level 1, 97 Rose Street Chippendale, NSW 2008 Australia Stefanie Eberhard stefanie.eberhard@germany.travel Tel: +612 (0)93 562 945	ARAB GULF STATES GNTB sales and marketing agency Arab Gulf States c/o Lufthansa German Airlines P.O. Box 9224, World Trade Center, 18th floor Sheikh Zayed Road, Dubai, U.A.E. Maria Ines Amaral maria.amaral@germany.travel Tel: +971 (0)44 057 515	CHINA/HONG KONG GNTB sales and marketing agency China/Hong Kong c/o German Chamber of Industry and Commerce Hong Kong & South China 3601 Tower One, Lippo Centre 89 Queensway Hong Kong Katrin Yeung katrin.yeung@germany.travel Tel: +852 (0)25 265 481
CHINA/MAINLAND GNTB foreign representative office China/ Mainland Beijing, Landmark Tower II Unit 1417, 8 North Dongsanhuan Road Chaoyang District, 100004 Beijing Zhaohui Li zhaohui.li@germany.travel Tel: +86 (0)10 6590 6406	INDIA GNTB sales and marketing agency India c/o Airplus Travel Services Pvt Ltd. 704 7th Floor Surya Kiran Building 19 Kasturbha Gandhi Marg, New Delhi - 110001 Romit Theophilus romit.theophilus@germany.travel Tel: +91 (0)11 4937 1001	JAPAN GNTB foreign representative office Japan 7-5-56 Akasaka, Minato-Ku Tokyo 107-0052 Rijkert Kettelhake rijkert.kettelhake@germany.travel Tel: +81 (0)335 860 380

ORGANISATION CHART OF THE GERMAN NATIONAL TOURIST BOARD (as at June 2016)



The Moselle town of Bremm viewed from the Calmont vineyard, Rhineland-Palatinate

Design and layout
M.A.D. Kommunikation
www.madkom.com

Copy
Asger Schubert
M.A.D. Public Relations
www.madkom.com

Translation
LingServe Ltd
www.lingserve.co.uk

Printed by
Druck- und Verlagshaus
Zarbock GmbH & Co. KG
www.zarbock.de



Picture credits
All pictures were provided by the German National Tourist Board, except:
inside cover Getty Images/Fabian Wentzel; p. 12/13 Getty Images/Florian Werner/LOOK-foto; p. 18 Getty Images/@by Feldman_1; p. 22/23 Getty Images/Philipp Klinger; p. 29 Tourismusverband Sächsische Schweiz e.V./Philipp Zieger; p. 37 Martin Stock / LKN-SH; p. 38/39 Imago/Imagebroker; p. 46 iStock/bluejayphoto; p. 50/51 Getty Images/gertectdesign; p. 59 oben GCB German Convention Bureau e.V.; p. 64/65 Klassik Stiftung Weimar/Jens Hauspurg; p.70/71 flymovies.de; p. 90/91 Getty Images/Westend61; p. 96 Getty Images/Jorg Greuel; p. 105 iStock/Meinzahn; p. 112 imago/Steffen Schellhorn; p. 117 TZS/EIKE DUBOIS; p. 135 Getty Images/Jorg Greuel

Published by:
German National Tourist Board (GNTB)
Beethovenstraße 69
60325 Frankfurt/Main
www.germanytravel

Supported by:

Federal Ministry for Economic Affairs and Energy
on the basis of a decision by the German Bundestag

Germany
The travel destination

German National Tourist Board (GNTB)
Beethovenstrasse 69
60325 Frankfurt am Main

Tel. + 49 (0)69 974 640
Fax + 49 (0)69 751 903
info@germany.travel



www.germany.travel