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DESTINATION GERMANY

GNTB ANNUAL REPORT 2016

SIMPLY

INSPIRING

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Berlin, IGA Berlin 2017,
Wolkenhain observation tower
on Kienberg hill

Dear friends, colleagues and partners of tourism in Germany,

In 2016, Destination Germany emphatically consolidated its position as a strong and competitive brand on the international market.



After several years of positive results, conditions were exceptionally difficult in 2016: the economic slowdown suppressed the appetite for travel in key growth markets of Asia and South America, terror attacks in Europe and military conflicts in the Middle East unnerved travellers in many markets, while the Brexit aftershock, sanctions and various other factors have led to extremely volatile travel patterns.

Despite all this, the figures for inbound tourism to Germany were positive, with the volume of overnight stays by international visitors exceeding 80 million for the very first time – a record result for the seventh year running. We are still 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 location for conferences and conventions and a destination for international luxury travel.

Germany cemented its position as the second most popular destination for European travellers – behind Spain, and well ahead of France.

This annual report presents a detailed overview of the latest developments in inbound tourism to Germany, the challenges and opportunities for Destination Germany, and the positioning of the brand on the international market.

In 2016, we added a number of new dimensions to our brand communications. This included the opening of new regional

offices in Singapore (for Indonesia, Malaysia, Singapore and Thailand) and in Buenos Aires (for Argentina and Chile), which have been coordinating systematic promotional activities for key emerging markets since early 2017. By having a physical presence in these markets we can show our local travel industry partners how highly they are valued in Destination Germany.

Our communication activities are centred on Destination Germany's core brand with the components culture and nature. In 2016, as well as promoting our basic themes to specific markets and target groups, we ran the theme-based campaign 'Holidays in the heart of nature in Germany', which succeeded in bringing lesser known aspects of Destination Germany to the attention of potential holidaymakers.

With digital media being the main thrust of our strategy, we were able to ramp up our online activities and social media campaigns, reaching even more travellers in an incredibly cost-effective way and creating a buzz around Destination Germany.

By employing innovative techniques such as robots and hologram installations to present the Luther and Beethoven themes at international trade events, we demonstrated that Destination Germany is a trendsetter.

To explore the current positioning of the Destination Germany brand on the international market and to review its

strategy for the future, we launched the Incoming and Brand Summit as a newly developed format.

Sustainability and accessibility are key issues for the future, and our inhouse innovations management team is ensuring these issues are addressed across all product lines. Over the course of 2016, we provided further impetus here both on- and offline.

The experiences and developments of 2016 formed the basis for the Germany Simply Inspiring communications campaign, which we launched internationally in the second quarter of 2017.

Last year, as in previous years, we were able to deliver our ongoing 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. The board 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.

The GNTB owes its success to the seamless interaction of its employees at head office, in the foreign representative offices and at the sales and marketing agencies around the world.

We would like to take this opportunity to express our heartfelt thanks to all our staff for the dedication, hard work and determination they put into our activities.

We are also grateful to the members and sponsors that support our work through their contributions, whether financial or otherwise.

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



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, and German Federal Government Commissioner for Tourism

Dear readers,

This publication shines a light on the multifaceted work of the German National Tourist Board (GNTB). The GNTB works on behalf of the Federal Ministry for Economic Affairs and Energy to promote Germany internationally as a travel destination, and is a greatly valued partner to us. Thanks to its highly motivated team, its extreme dedication and its fantastic instinct for opportunities and trends in the travel market, the GNTB makes a tremendous contribution to the continued development of tourism in Germany.

The promotion of international marketing for Destination Germany is an important and long-term task for the federal government. But it is not all about quantitative targets, such as overnight

stays or sales. The success of tourism in Germany means much more than that. It boosts the country's brand image and generates positive attention for cities and regions, which benefits Germany as a whole. The GNTB has excelled in all areas, as you will see for yourself in this annual report.

It makes me proud that our tourism industry contributes more than any other sector to Germany's positive and friendly image abroad. The warm welcome we extend to guests arriving in Germany shapes the way the world sees our country.

I must also praise the way the GNTB works with its partners: these collaborations give small and medium-sized enterprises and regional and local mar-

keting organisations the opportunity to appear alongside the GNTB at international events and showcase themselves on the global stage.

These joint marketing appearances help drive publicity and make the events even more appealing to the GNTB's target audience. By working together with organisations like the German Ramblers' Association and the German Cyclists' Federation, the GNTB raises the profile of issues such as sustainability and accessibility, which feature prominently in the government's tourism policies.

Growth in tourism triggers growth in other areas of industry, such as transport and trade, and opens up diverse opportunities for SMEs in particular –

and that's true of the entire tourism value chain. Whether it's through capital investment in infrastructure or through the upkeep and expansion of cultural attractions, our towns, cities and communities all benefit from tourism.

However, growth and job creation won't necessarily just happen by themselves. It is therefore vital that the government sees the tourism industry as a factor of importance for the country as a whole and implements policies and initiatives that are designed to benefit the industry. The government's current tourism policy is focused on increasing the competitive standing and performance of Germany's tourism industry.

This means encouraging growth and innovation, making it easier to restructure where necessary and making this SME-dominated branch of industry more profitable. It also means pursuing important social and structural objectives, such as the creation of accessible options throughout the tourism service chain or tapping into the potential for tourism in less well-developed rural areas.

Tourism is currently facing a wide range of challenges, including terror attacks, wars, and the movement of people fleeing war zones and persecution. This is where the tourism industry can play a key role in international understanding. Encountering people from other countries may help to combat xenophobia and nationalist tendencies. The more we experience different cultures and foreign social structures and form relationships with people who are different to us, the more likely we are to embrace cultural diversity and live peacefully together.

Germany is seen around the world as a very welcoming nation. The 2006 football World Cup and its accompanying slogan 'A time to make friends™' set the high standard by which we are now judged, and by which we judge ourselves. A tolerant, cosmopolitan outlook is key to Destination Germany's success and creates a strong foundation for promoting Germany as a travel destination.

A flourishing tourism industry has many positive ripple effects. In most

countries around the world, particularly in emerging and developing nations, the tourism industry – including the hospitality and travel trade, transport companies and other service providers – represents a significant economic factor, sometimes even the single biggest economic factor. Tourism is important in bringing in foreign currencies and creates and maintains an ever-growing number of jobs, as well as diverse training opportunities. And so for many countries, the tourism industry also serves as an anchor of stability.

We are unwavering in our belief that tourism can only add lasting value if it works in harmony with nature, respects the interests and wishes of the local population, fulfils its social responsibility and is inclusive.

I hope you enjoy reading this report and find it entertaining and informative.



Iris Gleicke

Klaus Laepple

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

Dear friends, colleagues and partners, dear readers,

2016 saw the GNTB register more than 80 million overnight stays by international visitors for the first time – the seventh record year in a row for Germany’s inbound tourism. This is excellent news indeed.

Nevertheless, the 2016 figures do also provide food for thought. At 1.4 per cent, growth was modest compared with previous years but this had been expected.

Some reasons for this had already become apparent in early 2016, with inbound tourism witnessing a phase of consolidation that comes as no surprise after a period of such exceptional growth.

These cyclical fluctuations are amplified by various external factors, which in 2016 included falls in the value of currencies, the shock Brexit vote, political unease and weaker economic development in emerging source markets that are important for the German travel industry.

And last year we saw that Germany has also become the target of international terrorism, as have other European countries. Fortunately, there have only been a few isolated incidents. But they stand in stark contrast to the strong image of safety for which Germany has been known.

The tasks faced by Germany’s inbound tourism industry, and therefore the GNTB, will not get any easier in 2017. The GNTB is already active in many areas, using modern media and interesting content to keep Destination Germany in the top rankings going forward.

However, we could not do this without the support of our partners in the industry and in politics.

Firstly, we need to foster an environment where foreign visitors are happy to travel to Germany. Democratic pluralism is one of our country’s great strengths. Hate speeches by politicians hoping to raise their profile through cheap populism, are not part of this.

Secondly, the GNTB and the federal government must clearly communi-

cate that Germany is still one of the safest travel destinations in the world.

The Board of Directors also believes that the political will to drive tourism needs to be reflected in the budget provided to the GNTB. Happily, the GNTB’s funding structure has become more stable over recent years thanks to the contributions from the Federal Ministry for Economic Affairs and Energy (BMWi).

The increased budget – and the savings made on internal costs – was needed for additional marketing activities to contend with increasing competition between destinations. By incorporating online activities and social media campaigns, the GNTB’s marketing strategy for Destination Germany has become more focused on the consumer and has set the standard for the international market.

The GNTB needs solid financial backing in order to spread risk and to be present and active in a broad range of markets. The new sales and marketing agencies in Singapore and Buenos Aires are showing what can be done here.



Klaus Laepple, President of the GNTB Board of Directors



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



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



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

The GNTB has also proved 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 many small and medium-sized tourism providers in the international markets.

There are still a lot of big opportunities for the German travel industry. The GNTB works hard to exploit this potential all over the world and its efforts are paying off. Inbound tourism will continue to grow thanks to innovative offerings, a strong presence in all relevant markets and a successful digital strategy.

I would like to personally congratulate Petra Hedorfer and her team on another year of fantastic results and expert strategic decision-making.

I was delighted to learn that the Travel Industry Club awarded Petra Hedorfer a place in its Travel Hall of Fame in 2017. This is well-earned recognition for her many years of unwavering dedication, to which the Board of Directors can attest.

I would also like to mention the constructive discussions with policymakers at the 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 Laepple

Petra Hedorfer

An interview with the
Chief Executive Officer of the GNTB



Ms Hedorfer, you started 2016 with a very cautious forecast. But the end of year brought with it another record result. What do you make of this development now?

There are a number of different ways we look at developments in the market. One way is in terms of the cyclical pattern that every market is subject to. After the long and continuous upward trend, it was only realistic to expect consolidation. Not only did we register six record years in a row, but the tourism growth in those years also consistently exceeded global and European averages. We were therefore cautious not to get ahead of ourselves.

At the end of the year, we registered record results yet again, this time exceeding the magic 80 million mark for international overnight stays. Growth, however, slowed down significantly.

How else do you look at development?

The second way of looking at the market is in terms of market potential. For inbound tourism to flourish, the situation in the source markets is paramount. People only want to travel and spend their money if they live in an

environment of financial prosperity and political stability. If these conditions aren't met, there won't even be a decision as to which destination to visit.

At the beginning of 2016, we saw an economic slowdown in some key emerging markets, including China; Brazil was facing a crisis, and we experienced a second year of declining figures from Russia – with no signs of recovery on the horizon. A further factor was the political instability evident in many regions of the world, brought about by terrorism, war and mass migration.

What role does security play?

Many travellers from overseas, and particularly from Asia, see Europe as one single destination. Consequently, the attacks in Paris and Brussels also had an impact on inbound tourism to Germany. According to IPK, the terror situation in Europe influenced the choice of destination for 68 per cent of Asian travellers. The situation was further compounded by the attack on the Christmas market in Berlin.

In a series of surveys on tourism in times of terror, which were conducted in 21 countries in February 2016,

October 2016 and February 2017, IPK International asked audiences how safe they considered a country/destination to be. Over the course of the surveys, the number of respondents who saw Germany as unsafe rose from 28 per cent to 31 per cent.

In times like these, what can you be sure of?

Germany's long-term success as a travel destination is built around its pillars of strength: its central location within Europe, its diverse and high-quality tourism offering, its value for money, its strong brand image and its targeted marketing.

The brand's strength is one of your most important assets. At the end of 2016, you initiated a new event format that focuses specifically on the Destination Germany brand. What is the thinking behind this event?

Given the ever-increasing competition between destinations, we wanted to analyse how our brand is viewed internationally and draw practical conclusions. To meet the wide-ranging requirements of this task, we devised a new and attractive event format that aims to encourage dialogue between distinguished experts and international market players.

During the event, eight knowledgeable presenters addressed the topic of 'Destination Germany' from a variety of perspectives. After two days of intense discussions, the conclusion was clear: Destination Germany is a strong brand. The economic situation in the source markets has a significant and sustained influence on travel patterns, whereas security concerns following attacks or periods of unrest have only a temporary impact.

So, we have a lot of market potential and a well-established brand. How can you use these strengths to generate actual demand?

We have just launched a major marketing campaign to embrace these strengths under the banner 'Germany Simply Inspiring'. The 'inspiration' comes from specific products, events and tourist attractions that we have carefully chosen in close collaboration with the regional marketing organisations.

Even when it comes to inspiration, you turn to digital tools ...

We are publicising these products and services by targeting specific markets through a range of relevant social media channels. There are themed videos on Facebook and Instagram, promotional videos on Facebook and YouTube, as well as canvas and carousel adverts highlighting the campaign theme. Online media plays a role in more than 80 per cent of trips to Germany, whether for inspiration, for information, for bookings or for posting recommendations and reviews. The growing use of digital technologies is being felt right across the tourism value chain, which is why we are now looking to offer a never-ending digital journey.

What is your forecast for the year ahead?

Some of the external factors that slowed our growth last year remain unchanged. However, we are seeing the first signs of recovery in some of the emerging source markets. The BRIC countries in particular are back on track. The competition between destinations is intensifying. Realistically, we are expecting growth of between 0 and 2 per cent.

The German National Tourist Board

Raising the profile of a fantastic product



Hessen, Frankfurt's skyscrapers overlooking the banks of the river Main

Strategic, professional marketing for Destination Germany

The German National Tourist Board (GNTB) has its headquarters in Frankfurt am Main, Germany. 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.



As the central service provider to the German tourism trade, the GNTB is the key contact for all partners in the German travel industry in the coordination 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.

GNTB brand strategy at a glance:

- Authoritative market research and market analysis
- Advising service providers and tourism organisations in the development of market-specific products
- Supporting and marketing tourist products and services 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
- Intensive press and PR activities abroad
- www.germany.travel website with links to partner organisations
- Social media activities targeted at B2B and B2C markets
- Advertising in international media with the involvement of tourism service providers
- Ongoing development and production of new theme-related advertising material
- Global media collaborations

Central organisation for Germany's inbound tourism industry

On behalf of the German federal government, the GNTB works to promote Germany globally 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.

The total budget made available to the GNTB in 2016 came to €38.8 million. This comprised government grants, contributions from members and funds generated by commercial activities. A total of €24.3 million of the overall budget was spent on marketing activities.

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

Boosting SMEs in Germany

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.

The yardstick for its success is the volume of overnight stays made by visitors from other countries. In 2016, this number exceeded 80 million for the first time. It was also the seventh consecutive record year for inbound tourism to Germany.

Combining strengths in the tourism industry

The global marketing of Destination Germany is underpinned by the cooperation between the GNTB and its 71 members and 16 sponsors, which include companies in the tourism industry, associations and all the marketing organisations of the federal states. Within the scope of its strategic theme-based marketing, the GNTB is continually expanding its inbound tourism network to include new partners.

The GNTB's multiplier strategy at a glance:

The German National Tourist Board uses numerous sales channels to target key market players around the world who can exert a multiplier effect:

- It represents Destination Germany at a select number of leading international trade fairs for the tourism industry.
- It canvasses potential sales partners in 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 signs up international tour operators.
- 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 GNTB's mid-term and long-term objectives and tasks

The federal government's tourism policy endeavours to create a positive environment in which the country's tourism industry can flourish. Within the federal government, the Federal Ministry for Economic Affairs and Energy (BMWi) takes the lead role in tourism policy. The BMWi is the main source of funding for the GNTB and is closely involved in the definition of specific tasks and targets for each year. These are designed to promote Germany around the world as a travel destination, which is the key long-term objective of the federal government.

Objectives and tasks assigned to the German National Tourist Board (GNTB) for 2017

Tourism is a key pillar of the German economy, contributing significantly to gross value added and job creation. Germany's tourism industry predominantly comprises small and medium-sized enterprises. It is very much in the interests of the federal government to increase Germany's tourism appeal, to secure and expand jobs and

institution by the Federal Ministry for Economic Affairs and Energy (BMWi) in accordance with a resolution passed by the German parliament. The GNTB is tasked with promoting Destination Germany to international markets.

The GNTB is a registered association and advertises Destination Germany around the world together with its foreign representative offices and sales and marketing agencies.

ancement of inbound tourism is in the national interest, because it has positive ripple effects in other areas of the German economy.

Lastly, the funding contributes to the pursuit of other qualitative goals. These include not only sustainable tourism (in ecological, economical and social terms), but also the government's structural objectives, such as developing tourism in rural areas, and social concerns, such as accessible tourism.

Cultivating the image of Destination Germany abroad / market research

In 2017, 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 mar-

In 2017, the GNTB opened two new sales and marketing agencies, in Singapore and Buenos Aires, in order to tap into further high-potential source markets.

training opportunities in tourism, and to boost the economies of underdeveloped regions.

Central to the pursuit of these objectives is the German National Tourist Board (GNTB), which is funded as an

The principal objective of the BMWi's institutional funding of the GNTB is to raise the number of tourists visiting Germany from abroad (inbound tourism). At its heart, the GNTB is also a tool for developing small and medium-sized companies. Moreover, the ad-



Left to right: Petra Hedorfer, Chief Executive Officer of the GNTB; Heike Brehmer, MdB, Chair of the German Bundestag's Tourism Committee; Iris Gleicke, MdB, Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy, Federal Government Commissioner for the New Federal States and for SMEs and Tourism; and Klaus Laepple, President of the GNTB Board of Directors, at the parliamentary breakfast at the Germany stand during the 2017 ITB travel fair.

keting 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 recognition of the Luther anniversary in 2017, sites associated with the Reformation and Martin Luther have been the focus of intensive promotion for some time now. Other topics featured in the international marketing of Destination Germany include the 2017 International Garden Show in Berlin and documenta14 in Kassel and Athens.

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 2017, the GNTB is once again promoting Germany at a number of leading trade and consumer fairs around the world and hosting at least ten 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 2017, the GNTB is continuing to focus on cooperations with partners in Germany and key brands that represent Destination Germany, such as Germany Trade and Invest (GTAI), the Association of German Chambers of In-

dustry and Commerce (DIHK) and the German Chamber Network, 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 the increased focus on the BRIC countries will be maintained.



Berlin, Old National Gallery

Members of the Tourism Committee of the German Bundestag

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, they champion the cause of the German tourism industry.

What have been and are now the most important **cornerstones of the inbound tourism industry** for this most recent legislative period?

What do you consider to be the major challenges for **continued growth in inbound tourism** to Germany?

Heike Brehmer MdB, (CDU/CSU)

Chair of the German Bundestag's Tourism Committee

In this legislative period, the committee focused its efforts on boosting cultural tourism in rural regions. It initiated a project designed to strengthen the link between tourism and the arts. It is not enough simply to have good products and services, you have to publicise them too. The GNTB is doing an excellent job of promoting Destination Germany to markets abroad. I would like to take this opportunity to thank the GNTB for its hard work and cooperation. With funding increased to €30 million, international marketing is guaranteed a generous budget.

The tourism industry will continue to face the challenge of keeping its infrastructure at the cutting edge so that Destination Germany remains an attractive proposition.

This means the sector as a whole needs to keep pace with the digital revolution. That said, Destination Germany would be nothing without its friendly and highly trained workforce of tourism specialists.

“Attracting and retaining skilled workers is of crucial importance to the future of the tourism trade.”

Attracting and retaining skilled workers is of crucial importance to the future of the tourism trade.





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



Kerstin Kassner MdB, Spokesperson on Tourism Policy for DIE LINKE



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



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

Daniela Ludwig

There were numerous horrific attacks in 2016, including in Istanbul, Brussels, Nice and Berlin. This has pushed the topic of security in tourism to the forefront of public attention. The

would handle further growth in the travel industry. Our country has an international reputation for premium quality. We must make sure that our high standards do not slip in response to a welcome rise in inbound tourism

“This has pushed the topic of security in tourism to the forefront of public attention.”

2017 travel survey showed just how much this factor has influenced, and will continue to influence, the travel habits of Germans, and undoubtedly all other tourists too. We clearly have a lot of work to do here. For Germany, there is also the question of how we

volumes. This might mean we have to modify existing structures, for instance by further expanding digital and transport infrastructure, making working hours more flexible, and doing more to tackle the shortage of skilled labour.

Kerstin Kassner

The international situation, i.e. the various conflicts around the world and, of course, the threat of terrorism, also affected inbound tourism in Germany during this most recent legislative period. It initially appeared that Germany was benefiting from its reputation as a safe and stable tourist destination. Attacks, such as the one on the Berlin Christmas market last year, may cause some foreign visitors to change their attitude. Nevertheless, most travellers still consider Germany a safe place to visit. For some specific regions in Germany, climate change is playing an increasingly visible role in tourism development. In the Alps, for instance, rising temperatures and reduced snowfall are putting the winter tourism trade under increasing pressure.

“Most travellers still consider Germany a safe place to visit.”

Though tourism boards cannot directly influence the threats and risks that climate change poses to inbound tourism, they can prompt change in other areas. For example, more could be done to support youth groups travelling to Germany by means of cultural exchange programmes, etc. Opportunities for such schemes in our links with the Russian Federation have been wasted in the current legislative period. We could also be offering specially tailored packages as a means of improving how tourism in individual regions, such as the Baltic coast, is promoted to international visitors.

Gabriele Hiller-Ohm

Over 80 million overnight stays by international visitors in 2016 – almost 1.9 million more than in 2013 – spells success for inbound tourism. The efforts of the GNTB played a decisive part in the sharp increase in visitor numbers.

With around €2.5 million in additional funding from the German government, we were able to significantly ramp up international marketing. By promoting accessible tourism, cultural tourism – especially in rural areas – and this year’s internationally significant Reformation anniversary in Germany, we have made important progress in line with our policies.

“The efforts of the GNTB played a decisive part in this sharp increase in visitor numbers.”

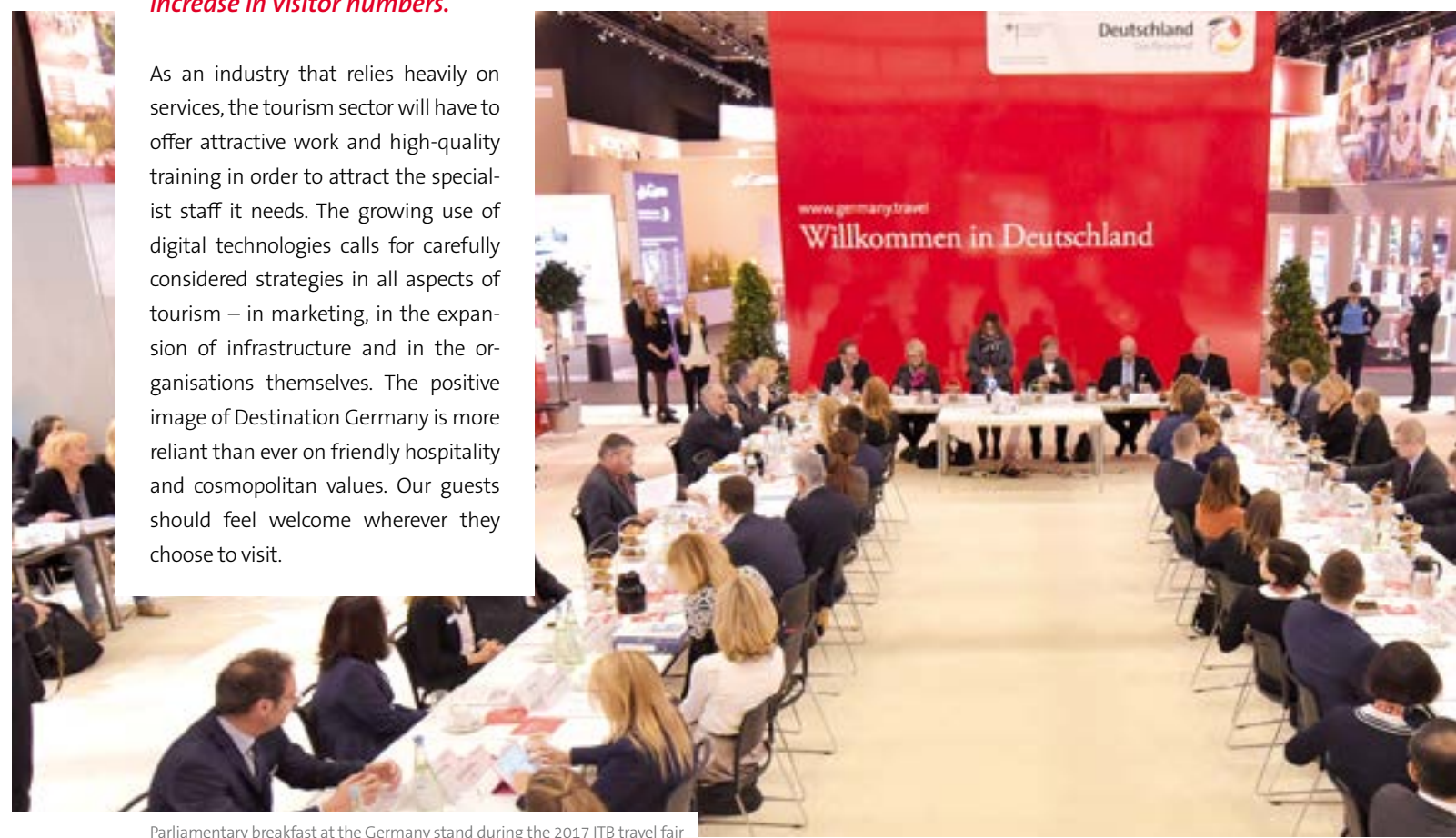
As an industry that relies heavily on services, the tourism sector will have to offer attractive work and high-quality training in order to attract the specialist staff it needs. The growing use of digital technologies calls for carefully considered strategies in all aspects of tourism – in marketing, in the expansion of infrastructure and in the organisations themselves. The positive image of Destination Germany is more reliant than ever on friendly hospitality and cosmopolitan values. Our guests should feel welcome wherever they choose to visit.

Markus Tressel

I am delighted to see the figures rising year after year. Inbound tourism is booming. This growth is down to the hard work and determination of all tourism stakeholders. The committee has addressed many issues during this leg-

“For Germany to sustain the high quality of its tourism products over the long term, we need a master plan for tourism.”

islative period: the strengthening of the skills base, the levying of trade tax on hotel accommodation and the impact of climate change on tourism, to name but a few. These challenges are not yet behind us. For Germany to sustain the high quality of its tourism products over the long term, we need a master plan for tourism. Following the model of the Austrian Hotel & Tourism Bank, which offers targeted funding, this master plan must include a strategy to release the current investment backlog in the industry. This calls for a development initiative that spans destinations in all regions and federal states. We can only achieve this if the GNTB has more financial backing. Our neighbours in Europe are already a step ahead of us in this respect. It is high time the government funded new in-depth studies into the booming segments of cycling tourism and camping holidays. Even though tourism in Germany is on the right track, there is still much to do.



Parliamentary breakfast at the Germany stand during the 2017 ITB travel fair



Facts, figures and image

Effective marketing
shows its worth

Inbound travel to Germany 7th record year in a row

In 2016, Germany strengthened its already strong position in the international market and made an important contribution to global tourism as a leading economic factor in the 21st century. Despite a challenging environment, most of the major source markets are continuing to grow, securing Germany's positioning as an increasingly popular holiday destination and a top destination for business travel.

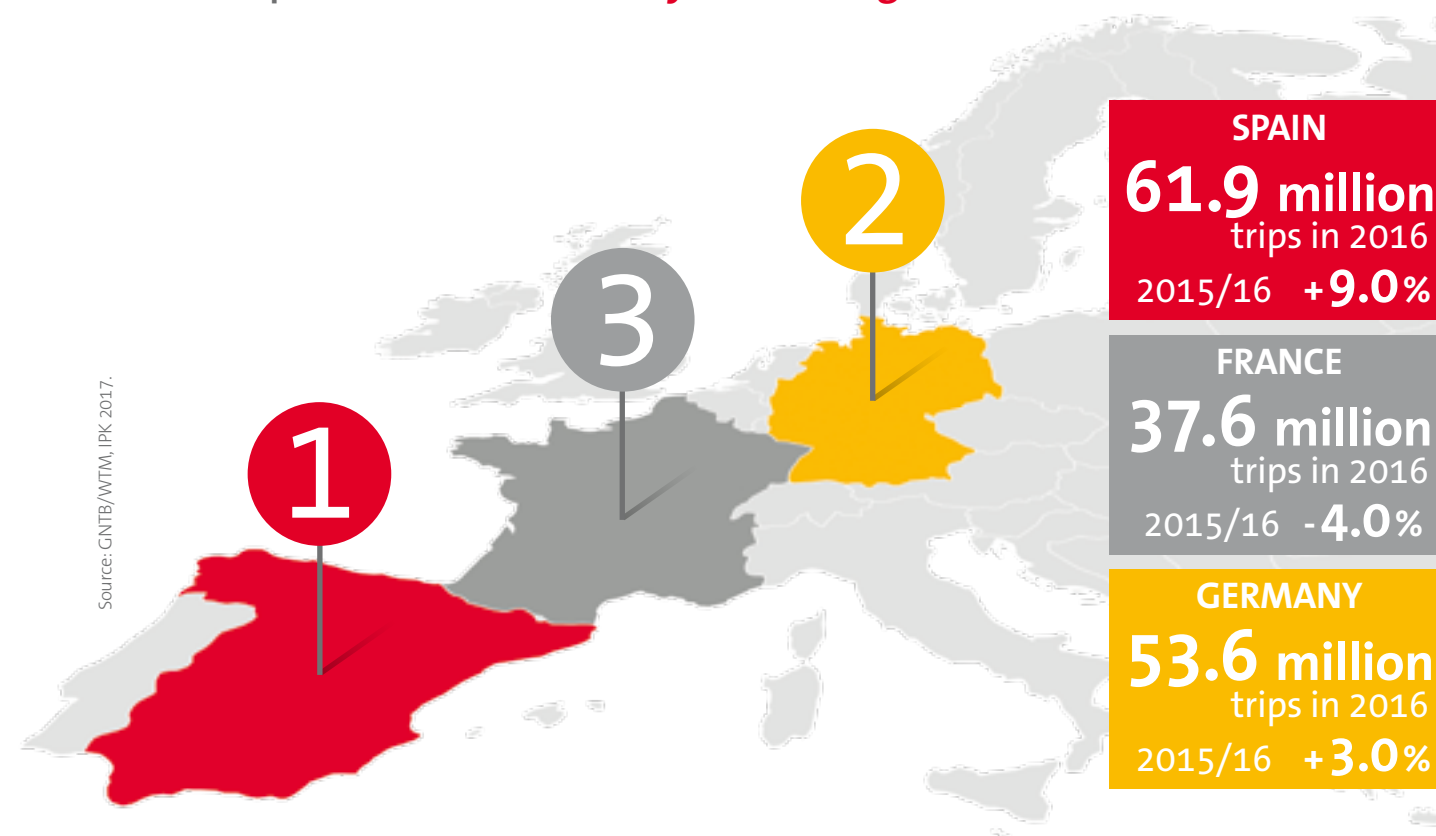
80.8 million
overnight stays by foreign visitors in 2016

+1.4% (2015/16)

This level of growth is within the 0 to 3 per cent range forecast by the GNTB. International visitors accounted for 18.1 per cent of all overnight stays in Germany.

Schleswig-Holstein, beach on the island of Sylt

Destination Germany the **second most popular** destination for Europeans for the **seventh year running**



Looking to the wider world:

Global travel industry continues growth trajectory

Global tourism grew by roughly 4 per cent in 2016 to reach a further record high of 1.23 billion arrivals.

Travel patterns, however, are shifting. Though Europe remains the largest destination market for international travel, its growth in inbound tourism has slowed to 2.1 per cent compared with 2015. In the Americas (up by 3.9 per cent overall), South America grew by 6.3 per cent, outperforming North America by some margin (up by 3.0 per cent). Asia proved to be the engine of growth for global travel, recording an increase of 8.6 per cent. At 8.2 per cent, Africa's growth was also buoyant – albeit from a much smaller market. (Source: UNWTO, April 2017).

Despite a challenging market environment, tourism retained its position as a **leading driver of the global economy in the 21st century.**

Destination Germany is ideally positioned in the international market

Destination Germany was once again able to extend its excellent position in the top tier of European travel destinations in 2016. The World Travel Monitor, compiled by market research company IPK International, revealed that 53.6 million trips were made to Germany last year, up by 3.0 per cent on 2015.

Spain recorded 9.0 per cent growth and topped the rankings with 61.9 million trips. France remains in third place, despite a drop of 4.0 per cent to 37.6 million trips, and is followed by Italy in fourth place (up by 5.0 per cent to 36.2 million trips).

Almost **three quarters** of all international overnight stays in Germany were made by visitors **from other European countries**.

EUROPE
59.6 million
overnight stays
2015/16 **+1.9%**

OVERSEAS
19.6 million
overnight stays
2015/16 **-0.3%**

Saxony, Rakotzbrücke bridge in Kromlau Park

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

Where do Germany's visitors come from?

Germany beating the market in the battle for European travellers

Germany's performance in 2016 is especially good when considered alongside the general developments in travel patterns of a number of its source markets. For example, the number of trips abroad made from Belgium fell by 0.7 per cent overall last year, whereas the number of trips to Germany from this market climbed by 5.2 per cent. In France, 3.1 per cent more outbound trips were made than in the previous year; the number of trips to Germany rose by 4.5 per cent, however. Outbound trips from Spain went up by 4.7 per cent, whereas trips made from Spain to Germany rose by 5.2 per cent.

Traditionally strong European source markets show above-average growth

In 2016, almost three quarters of all international overnight stays in Germany (73.7 per cent) were made by visitors from other European countries. These markets made the greatest contribution to absolute growth in Germany's inbound tourism sector, generating 1.1 million more overnight stays than in the previous year.

Six of the ten most important European source markets have strengthened Germany's inbound tourism in 2016 through above-average growth.

Top growth markets in Europe in 2016

FRANCE	+5.7%
SPAIN	+5.5%
POLAND	+5.4%
BELGIUM	+4.5%
SWITZERLAND	+3.3%
AUSTRIA	+2.0%

Source: Federal Statistical Office 2017.

Great potential in overseas markets

The USA, the third-biggest source market for Destination Germany and still its biggest overseas market, continues to exhibit dynamic growth, with a 2.5 per cent increase on the prior year. Heavily populated countries in Asia and South America offer great potential as source markets for global tourism, even if in 2016 economic factors and security concerns slowed down the high growth rates of previous years.

2017: BRIC countries BACK ON TRACK

Brazil
195,212
overnight stays
+11.2%

India
232,573
overnight stays
+7.0%

Russia
560,751
overnight stays
+18.8%

China
746,515
overnight stays
+10.0%

Source: Federal Statistical Office January-April 2017.

Initial trends for 2017

Economic factors, such as Brexit and financial crises in high-volume source markets, and security concerns, such as the fear of terrorist attacks, temporarily dampened the appetite for travel in some source markets and resulted in a high level of volatility over the course of the year. 2017 started off with a period of stabilisation, especially in the high-potential markets in Asia and South America, with all BRIC countries back on track in terms of inbound tourism.

Where are visitors going? The most popular travel destinations in Germany



10 Magic Cities
27% of inbound tourism

The magnetic pull of cities

Major cities and metropolitan regions proved to be the engines of growth for inbound tourism in 2016. The top performer among the city states was Hamburg, which registered a 5.5 per cent increase to 3.3 million international overnight stays. Next came Berlin, with a rise of 3.9 per cent to 14.2 million overnight stays by visitors from abroad.

Major cities and metropolitan regions proved to be the engines of growth for inbound tourism in 2016

Other cities with above-average growth in 2016 were Nuremberg (up by 6.5 per cent), Düsseldorf (up by 5.4 per cent), Leipzig (up by 3.9 per cent) and Frankfurt (up by 2.9 per cent). Among the non-city states, Hessen (up by 2.3 per cent) and North Rhine-Westphalia (up by 2.7 per cent) made particularly strong contributions to inbound tourism. There was moderate growth in Mecklenburg-Western Pomerania, Brandenburg and Saxony-Anhalt.



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

We are delighted with the results for inbound tourism in 2016, but this is no guarantee that growth will continue in the future. Any changes to external factors, brought about by terrorism, recession or immigration policy for instance, will have a direct impact on travel plans. The strengths of

the Magic Cities group, which encompasses Germany's top city locations, lie in its collective expertise and combined marketing efforts.



Number 1
destination for
city and cultural
breaks
for Europeans

Bavaria, Classics Open Air festival on Odeonsplatz square in Munich

Germany's cities are a big hit with culturally minded travellers

City breaks are the winners of 2016. Compared with 2015, this sector grew by 23 per cent to secure a market share of 40 per cent. The second most popular type of trip for Europeans visiting Germany were multi-destination tours, whose share of the market fell from 21 to 17 per cent. Travel for events increased by 16 per cent and now represents 4 per cent of the market.

Cultural trips made up over 60% of the market

Source: GNTB/WTM, IPK 2017.

This is also reflective of where German cities stand in the European travel market. Germany is the only country with four entries in the top 25 cities by volume of international overnight stays: Berlin ranks number seven, followed by Munich at 15, Frankfurt at 22 and Hamburg at 25.

Intensive marketing for tourism in rural areas

In accordance with the objective set by the federal government, the GNTB continued in its efforts to promote tourism in rural regions. The overarching initiative 'Beyond the cities – holidays in the German countryside' is being supported by theme-based marketing campaigns such as 'Holidays in the heart of nature in Germany' (2016) and 'Culinary Germany' (2018).

The GNTB's Quality Monitor survey 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).

Germany's biggest source markets are its neighbouring countries. The Netherlands leads the way with a 31 per cent share of the market (5.3 million overnight stays), followed by Switzerland (2.3 million), Belgium (1.3 million), Denmark (1.0 million), Austria (0.9 million) and France (0.7 million).



21% of overnight stays
in rural regions

Saarland, Bliesgau
UNESCO Biosphere Reserve

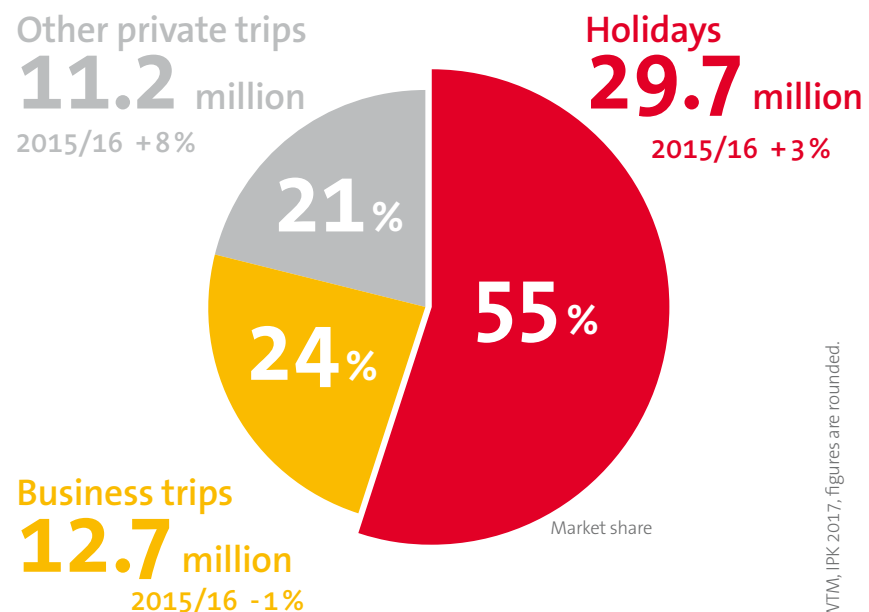


Brigitte Goertz-Meißner, President of the German Spa Association (DHV)

Health tourism in all forms – from spa breaks to trips for specific medical procedures – is closely associated with attractive tourist offerings outside the major cities. In 2016, the number of international overnight stays made in Germany's quality-certified spa and health resorts rose by 1.6 per cent to reach 6.9 million. At the German Spa Association, we promote our product around the world through our cooperation agreement with the GNTB.

Business or pleasure?

Throughout Europe, the weighting of the travel segments in 2016 remains unchanged from the previous year. Holiday travel, which is by far the largest segment, grew by a further 4.6 per cent to reach its current market share of 74 per cent. The business travel sector saw a slight decline but retained a 14 per cent share of the overall market. Other forms of private travel (visits to friends and family, and other trips) fell by 2.4 per cent and represent a market share of 13 per cent.



Germany remains popular with European holidaymakers (+ 3 %)

Source: GNTB/WTM, IPK 2017, figures are rounded.

Germany is once again the top business destination in Europe.

According to IPK International and the World Travel Monitor, Europeans made 63.3 million outbound business trips in 2016, 1 per cent less than in 2015. This trend is also reflected in the German business travel market, where the number of trips fell from 12.8 million to 12.7 million.

The overall rankings remain unchanged: Germany is still number one, well ahead of France (4.9 million trips) and the United Kingdom (4.8 million).

Promotable business trips still account for more than half of the market (53 per cent). An 8.9 per cent increase in visitors to conferences and conventions (now 4.0 million) compensates for the poor results in the trade fair and exhibition sector (down by 9.7 per cent to 2.3 million).



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

In 2016, conferences and conventions once again proved to be engines of growth for the business travel segment. The meetings and events barometer also indicates that the number of international participants at conferences, conventions and business events in Germany is rising steadily: the figure more than doubled in the period from 2006 to 2016, increasing from 14.3 million to 32.9 million, and grew by 18 per cent in 2015 alone. This positive trend underpins the GCB's strategy for promoting Germany worldwide, specifically in terms of its expertise in key fields of science and business, its wide-ranging options for holding sustainable events, its capacity for innovation and its future competitiveness.

Inbound tourism a boon for the economy

The tourism industry as a whole plays a key role in the German economy. In 2015, domestic and international tourists spent in excess of €287 billion on goods and services in Germany. Almost three million jobs are reliant on this revenue, whose overall value to the economy amounts to more than €105 billion. These figures are reported in a new study on tourism as an economic factor, commissioned by the Federal Association of the German Tourism Industry (BTW) and funded by the Federal Ministry for Economic Affairs and Energy (BMWi).

Travel expenditure of international guests has been rising steadily since then. In 2016, Europeans visiting Germany spent €32.3 billion, 6.6 per cent more than in 2015. The increase in expenditure by travellers from overseas was even higher, at 9 per cent. In total, they spent €20.2 billion. This includes all expenditure for transport, accommodation, food and shopping etc. while staying in Germany, as well as travel to, from and within Germany.

*Source: Global Blue, 2017.

The inbound travel industry makes a significant contribution to Germany's balance of international payments. According to the Bundesbank, travel receipts from foreign visitors to Germany rose by 1.7 per cent in 2016 to €33.8 billion. This is

the seventh successive increase and means that the income from inbound tourism offset 46 per cent of the money spent by Germans travelling abroad.

Germany remains a popular shopping destination

In 2016, shopping tourism made another important contribution to the economic value creation of inbound tourism. Total retail revenue generated by tourism fell by 17 per cent last year to €1.65 billion due to the prevailing situation in key shopping tourism source markets. Nevertheless, with its 10.1 per cent market share, Germany claimed fourth place in a ranking of the world's shopping destinations.

The Chinese remained the highest spenders in Germany in 2016, and despite a sharp decline in the revenue they generated, they retained a market share of 39 per cent. Russian travellers remain in second place with a market share of 10 per cent, followed by Switzerland, the United Arab Emirates, Kuwait, Taiwan, Israel, Thailand, the USA and Saudi Arabia. The most popular products are fashion/clothing (44 per cent) and watches/jewellery (22 per cent).*



Wolfgang Bauer, Managing Director of Holy AG

In 2016, Outletcity Metzingen excelled itself again by beating the record-breaking revenue growth of 2015. Our key source markets China, South Korea, Switzerland, Russia, France and the Arab Gulf States played a major role in this achievement. One of the keys to our success is our luxury brand portfolio, which is more extensive than most. Another contributing factor is our strong working relationships with tour operators, healthcare companies and incentive travel agents. We are also being approached by more and more German companies looking to offer international delegations, clients and partners the full experience during their stay in Germany.

THE SOURCE MARKETS GENERATING THE MOST REVENUE

USA € 5.0 billion 2015/16 + 11.0%	China € 4.6 billion 2015/16 + 15.0%	Switzerland € 3.9 billion 2015/16 + 3.0%	Poland € 3.8 billion 2015/16 + 23.0%	Arab Gulf States € 3.2 billion 2015/16 + 14.0%	United Kingdom € 2.5 billion 2015/16 + 4.0%
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Source: GNTB/WTM, IPK 2016.

Destination Germany's strong brand image boosts its popularity among travellers

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, which gauges the views of tourists who are already in Germany.

According to the **2016 Travel and Tourism Competitiveness Report** compiled by the WEF*, **Germany held on to 3rd place on the supply side in a comparison of 136 countries.**

The ranking is based on 14 indicators and other subcategories, including transport infrastructure, tourism infrastructure, hotel price index and natural cultural resources.

*World Economic Forum

As an **economic power** compared against **140 other countries** in the WEF's **Global Competitiveness Report**, Germany was ranked **an impressive 5th place.**

In 2016, tourism in Europe and therefore Germany faced additional challenges owing to general security concerns. Many international tourists, particularly those from Asia, see Europe as one single destination, and so associate Germany with the attacks in Paris and Brussels. According to IPK, the ter-

ror situation in Europe influenced the choice of destination for 68 per cent of Asian travellers. In a series of surveys on tourism in times of terror conducted in 21 countries, the research institute IPK International asked people how safe they considered a country/destination to be. Over the course of the

Germany's institutions, infrastructure, healthcare, education and technology standards are among the main factors in its strong showing.

surveys (Feb 2016 – Feb 2017), the number of respondents who saw Germany as unsafe rose from 28 per cent to 31 per cent. And in the WEF's latest Travel and Tourism Competitiveness Report, Germany dropped from 20th position in 2015 to 51st in 2017 in the Safety & Security subcategory.

In 2016, the highly respected **Anholt-GfK Roper Nation Brands Index**, which measures the image of 50 countries around the world, put **Germany in 2nd place.**

In the tourism category, Germany came ninth, keeping it on a par with traditional holiday destinations such as those in the Mediterranean.

The Anholt-GfK Roper Nation Brands Index (NBI) ranks 50 destinations around the world in terms of their reputation. It 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.

Outlook for 2017 – cautious optimism

A number of uncertainties continue to dominate forecasts at the end of 2016 and at the start of 2017.

- Economic turbulence
- Division in Europe
- Geopolitical uncertainties and threats
- Wars and sanctions
- Security considerations and freedom of travel

Nevertheless, the latest UNWTO forecasts suggest that the international travel market will expand by between 3 and 4 per cent this year. For Europe, the World Tourism Organisation forecasts growth of between 2 and 3 per cent.

The GNTB's overall forecast for the current year is for growth of between 0 per cent and 2 per cent. This is based on analysis of the latest UNWTO and World Travel Monitor forecasts and on projections drawn from Federal Statistical Office data.

South American countries and South East Asia offer high potential

A total of nearly **4 million more overnight stays*** in Germany from these regions achievable by 2030.

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

New GNTB representative offices in Singapore and Buenos Aires open in 2017

Forecast for 2030



Growing range of transport options for inbound tourism

To maintain Destination Germany’s appeal, it is essential that the country’s transport options are easily accessed and wide-ranging, which puts transport service providers under pressure to tackle some major challenges. The main issues affecting the transport sector’s tourism value chain in 2016 were the sharing economy, price awareness, security, the digital revolution, sustainability and increasing international competition. In 2016, cars and aeroplanes were once again the most popular modes of transport.



Heike Birlenbach,
Senior Vice President Sales
Lufthansa Hub Airlines
and Chief Commercial
Officer (CCO) of Hub
Frankfurt

After the number of non-transit passengers travelling to Germany with Lufthansa rose by around 10 per cent in 2016, we put plans in place to further increase inbound tourism in 2017 and beyond.

In the International Year of Sustainable Tourism for Development, we are pressing ahead with the modernisation of our fleet and commissioning 40 new and ultra-efficient aircraft. The leading example of this is the new Airbus A350, which marks our entry into the two-litre class. No other aeroplane is as economical or as quiet. Besides the environmental benefits it brings, this new plane enables us to further improve the travel experience for our passengers.

Volume of air traffic a good indicator of growth in inbound tourism

Obviously, visitors from source markets outside Europe travel to Germany almost exclusively by air. 97 per cent of them arrived by aeroplane in 2016. Of the European visitors to Germany, 17.5 million, or one third, travelled by plane, a 2 per cent increase on the previous year.

The consolidation of inbound tourism from overseas and the rate of growth in the European markets are reflected in the volume of passenger traffic recorded by Germany’s commercial airports. Last year, the German Airports Association (ADV) registered 223.2 million arrivals and departures, a 3.4 per cent increase on 2015. Whereas there was a 0.2 per cent drop in the number of intercontinental passengers arriving and leaving, the European source markets generated a 4.6 per cent increase in traffic.

In comparison with other tourist destinations, Germany is very well equipped for international aviation, accommodating more than 100 internationally operating airlines across its 22 international airports, including a number of hubs located in metropolitan regions. Frankfurt is the third-largest airport in mainland Europe, and Munich and Düsseldorf are both established hubs for domestic and international carriers. Projects to increase capacity at the major airports are either in progress or in the pipeline.

Overcapacities and increasing competition between airlines are key issues in international aviation. Low-cost carriers are exerting ever more competitive influence on the short-haul/mid-haul segment in Europe.

Individuality is king: car traffic from Europe continues to grow

Within the EU, Germany is the largest transit country and has the most extensive network of highways and the highest volume of road journeys. 85 per cent of private travel is conducted by road. The current infrastructure makes it easy to travel across borders – including for inbound tourism.

IPK figures reveal that of the 53.7 million Europeans who travelled to Germany last year, 25.4 million arrived by car – 5 per cent more than in 2015. This means the market share of car drivers held steady at 47 per cent.



Dr Stefan Schulte, Chief
Executive Officer of Fraport AG

Air traffic within Europe is seeing rapid growth in direct flights and in the low-cost segment in particular. By making Frankfurt airport much more accessible to this segment, we are expanding and diversifying our service. But of course our main focus remains on the hub-and-spoke flights that are key to attracting high-spending international travellers to Frankfurt and Germany.

Andreas von Puttkamer,
Head of the Aviation Division,
Flughafen München GmbH



In the intercontinental markets, specifically the North American market, double-digit growth was recorded in 2016. In the European markets, the growing range of low-cost services in Spain, Portugal, the Netherlands, France and the UK led to high double-digit growth in inbound traffic to Germany. Munich Airport is also anticipating a significant increase in traffic in 2017, when it expects to handle an additional 1.5 million passengers.



Thomas Schnalke, Chairman
of the Management Board,
Flughafen Düsseldorf GmbH

2016 was an extremely successful year for us, in which we registered 23.5 million passengers and well exceeded our high expectations. This was in large part due to double-digit growth in traffic from and to the USA and destinations in Asia. Furthermore, the deployment of larger aeroplanes contributed to increased traffic from within Europe. All the signs indicate that this positive trend will continue in 2017.



Regine Sixt, Senior Executive Vice President, Sixt SE

The number of air passengers has been rising for years. For many of them, arriving at the destination airport is inextricably linked with picking up a hire car. Sixt has branches at almost all major

airports in some 115 countries around the world. Our aim is to provide our international customers with a convenient service for a quick, comfortable and hassle-free onward journey to their desired destination. We also operate numerous successful partnerships with big-name airlines and hotel chains, which allows us to add value for our customers in the form of bonus miles, discounts and other benefits.

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



Car travel is becoming an increasingly important part of the holiday experience. Driving is more than simply a means of getting somewhere, it's part of the adventure too. We're seeing this first hand in the high demand for our Avis Select Series, which allows customers to reserve a specific model rather than a vehicle category. Even the Porsche models, which are available exclusively in Germany, are proving hugely popular. And through our partnership with Paravan, customers with restricted mobility can enjoy the ride too.



Dieter Gauf, CEO, RDA International Coach Tourism Federation

Inbound travellers may arrive predominantly by plane, but they generally transfer to a coach, because they want to see the country and discover the culture in its truest form. The coach gives travel-

lers a close-up view of the country and its people, and passengers can make spontaneous stops to look at places of interest or participate in events. What's more, coach travel reduces traffic and parking pressure, thereby helping to protect the environment.

The trend towards a more integrated mobility network linking various providers and transport systems saw some major advances last year. For example, Deutsche Bahn subsidiary DB Connect now enables customers to transition directly from their train to a Flinkster hire car or a Call a Bike bicycle for an individual and sustainable onward journey. Flinkster has become Germany's most extensive car-sharing network, operating 4,000 vehicles in more than 300 locations. Call a Bike and StadtRad manage the rental of some 10,000 bicycles in around 50 towns and cities.

Electric-powered transport: a clean path ahead

The federal government has set out to establish Germany as the leading market for electric-powered transport. This involves diverse initiatives that also incorporate transport options for tourists.

Car rental companies are expanding their fleets with hybrid and electric vehicles to give drivers a carbon-neutral option, and are looking beyond their traditional business models to develop new customer-centric and sustainable concepts.

To stand out in the market, tourist regions are offering a wide range of specific products and services under the sustainability umbrella. Initiatives include an integrated network of rental stations for e-bikes, which can be recharged at the next station free of charge.

Green light for coaches: an affordable and eco-friendly option

In 2016, coach transport confirmed its position as a key pillar within the German travel industry. The deregulation of long-distance coach travel on 1 January 2013 led to a major expansion in services, rising from 86 lines at the end of 2012 to around 350 routes by the end of 2015. And 2016 saw a general consolidation of the market, with 269 lines and nine approval requests registered with the Federal Ministry of Transport as at 31 December. Market leader FlixBus now controls 90.8 per cent of the market and is looking outside Germany to drive further growth. Services in around 20 European countries are opening up options for inbound tourism.

As a result, the number of European guests travelling to Germany by coach grew by an impressive 10 per cent to reach 4.9 million. In addition to this, some groups of international travellers arrive by plane and then climb aboard a coach to discover Germany on a sight-seeing tour. Tourist coaches represent an environmentally responsible mode of transport that add to Germany's positioning as a sustainable travel destination.



André Schwämmlein, Founder and Managing Director, FlixBus DACH GmbH

Exciting developments in inbound tourism include the many new departure points on international long-distance coach lines bound for Germany (as of 7 April

2017 in our summer timetable), and our initiatives with almost 50 small and medium-sized towns in Germany. New long-distance coach connections are available in places such as Cuxhaven, Füssen, Ingolstadt, Iserlohn, Löbau, Moers, Pforzheim and Wolfsburg. We are also incorporating more airports into the FlixBus route network, making the journey easier for our customers who want to travel on from Germany to countries outside Europe.

Dr Ralph Körfggen, Chief Executive Officer of DB Vertrieb GmbH



The number of long-distance train passengers in Germany rose by seven million to reach more than 139 million last year—a new record. One reason for this increase is the growing use of digital technologies, which are a key lever for greater customer focus. Our aim is to offer intelligent and integrated travel solutions across all modes of transport.

In 2016, we made the customers' experience even more modern, pleasant and convenient by completing the roll-out of free Wi-Fi on all InterCityExpress trains at the end of 2016, by continually enhancing our DB Navigator travel app and by improving passenger information systems at train stations.

Germany is currently seeing record figures for cycling tourism, which is growing faster than almost every other holiday segment. In 2016, 5.2 million tourists pedalled to Germany's hot-spots – up by 16 per cent on the previous year. Even among international travellers, cycling and mountain biking are the most popular active holiday pursuits after walking.

Touring cyclists are six times more likely to arrive by train than your typical holidaymaker, making cycling tourism one of the most sustainable forms of travel. Pedelegs are more popular than ever, with around 13 per cent of cycling tourists opting for the extra boost that they provide. One in five expect to hire their bikes on arrival at their destination, which means quality is a top priority.



Burkhard Stork, National Executive Officer, German Cyclists' Federation (ADFC)



GNTB members, sponsors and partners

Working together towards a common goal

A strong network for a strong brand

During the course of 2016, the GNTB reinforced its close working relationship with its members, 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 has built up long-standing close contacts and active partnerships in the worlds of business and politics, at home and abroad, and with organisations and associations. Together, these members, sponsors and partners form a closely knit network that contributes to the successful global marketing of Destination Germany.

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.

Membership opens up a multitude of opportunities for the partners. This includes direct access to market re-

expertise in the industry add value to all inbound tourism activities.

By becoming a GNTB member, leading companies from Germany's travel industry benefit from extensive experience and a strong presence in international markets. This is especially advantageous for small and medium-sized enterprises. Many of these SMEs offer interesting and competitive products but lack the manpower and the experience to reach international markets. As members, they have the opportunity to make use of the GNTB's expertise, to take part in cost-efficient and targeted marketing campaigns, and to appear alongside the GNTB at trade fairs, workshops and roadshows.

As at 31 December 2016
the GNTB network comprised
71 members
and **16 sponsors.**

The GNTB's members are the cornerstones of its network. 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.

search, 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 the GNTB on joint marketing campaigns. The GNTB's contacts, experience and wide-ranging

Companies



A • Accor Hospitality Germany GmbH • **Air Berlin** PLC & Co. Luftverkehrs KG • **Autostadt** GmbH • **Avis** Budget Autovermietung GmbH & Co. KG • **B** • Best Western Hotels Central Europe GmbH • **D** • DB Vertrieb GmbH • **Deutsche Hospitality** • **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 Metzingen Holy AG • **R** • Reise Mission GmbH • **Ringhotels e.V.** • **Romantik Hotels & Restaurants AG** • **S** • Sixt AG • **Staatliche Porzellan-Manufaktur Meissen GmbH** • **Stage Entertainment Marketing & Sales GmbH** • **T** • Thomas Cook AG • **Trainline.com Limited** • **TUI AG** • **V** • Value Retail Management Germany GmbH • **W** • Wellness-Hotels-Deutschland GmbH

New member in 2017

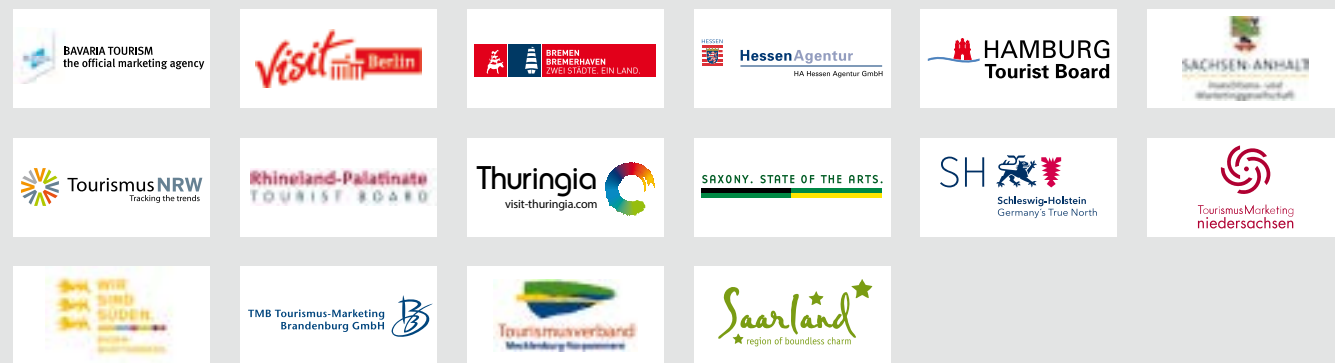
trainline Trainline

Train booking agent Trainline became a member of the GNTB on 1 January 2017. Trainline is an online seller of rail tickets that operates throughout Europe. In 2009, the platform was launched in France under the name Captain Train, which merged with its UK competitor Trainline in 2016. As the Trainline Group, the company is the official sales partner to many major rail companies and now sells 5,000 tickets a day to 1.8 million registered users in more than 20 countries.

"Trains are the ideal mode of transport for getting to Germany and around it. And Trainline's app makes it easier than ever for travellers to book the right ticket at the best price. Our partnership with the GNTB is a major milestone in our quest to encourage tourists to explore Germany and Europe by train."

Daniel Beutler, General Manager of Trainline

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

The GNTB's 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 been working successfully with the GNTB since 1957. The Lufthansa Group, comprising Lufthansa, Eurowings, SWISS and Austrian Airlines, connects Germany with airports all over the world. The portfolio now also includes the strategic equity investments SunExpress and Brussels Airlines. The Passenger Airline Group operates a multi-hub strategy, giving passengers an extensive choice of flights and maximum flexibility for travel. All of the airlines share the common objective of meeting customers' demands in terms of safety, quality, punctuality, reliability and professional service. Alongside a core level of international cooperation, the partnership incorporates joint sales and marketing ventures in key source markets and emerging markets.



DB Vertrieb GmbH

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. DB Vertrieb GmbH has exclusive responsibility for the marketing and passenger ticket sales of DB and many other transport companies. As such, it is the vital link between the railway and some five and a half million passengers. People from many European countries can travel quickly and conveniently to Germany by train. Within Germany, the frequent InterCityExpress services connect major cities and conurbations, which then offer a wide range of transport options for onward journeys to regional destinations. Travellers can then get from A to B in an eco-friendly way. Diverse marketing campaigns have been implemented overseas for a number of years and this intensive and successful model of cooperation continued in 2016.

A representative cross-section of the industry

More than half of all GNTB members are commercial enterprises. With Deutsche Bahn, international commercial airports, airlines, car rental companies and coach service providers among our members, the network has travel to and within Germany well covered. The hotel industry is represented by everything from budget accommodation for young travellers to luxury hotels. Companies offering unique travel experiences in Germany benefit from the added value of GNTB membership just as much as those operating in shopping tourism. Travel insurance providers and other tourism-related companies complete the portfolio of member companies.

Because the GNTB receives grants from the Federal Ministry for Economic Affairs and Energy, its operations must adhere to the federal principle. Through the work of the GNTB, all federal states

should have the opportunity to benefit from growth in inbound tourism. All 16 states are therefore members, represented by their regional marketing

Long-term success is built on a continuous exchange of knowledge and a coordinated strategic approach that reflects the markets' requirements.

Members and sponsors reflect the depth and breadth of services provided by Germany's travel industry:

40 companies
16 regional marketing organisations
15 associations

organisations, and are actively involved in the development of strategies and in the delivery of marketing campaigns.

To successfully promote tourism 'made in Germany' to the international market, the relevant service providers must work closely with their representatives.

Marketing organisations and associations, for example, contribute their individual expertise and the strength of their own networks to the committee work and to collaborations with other members. Together, they are all working towards the same goal: to stimulate further growth in inbound tourism.

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. (MCC) • **R** - RDA Internationaler Bustouristik Verband e.V. • **U** - UNESCO-Welterbestätten Deutschland e.V. • **W** - Willy Scharnow-Stiftung für Touristik

Additional strategic partner: Deutsches Küstenland e.V. (represented in the GNTB member portfolio by the northern German regional marketing organisations)

Sponsors



B • AG Barrierefreie Reiseziele in Deutschland, Dr Carmen Hildebrandt, Spokesperson • Bundesverband der Gästeführer in Deutschland e.V. (BVGD), Dr Ute Jäger, Chairwoman • **C** • Cittaslow Deutschland e.V., Manfred Dörr, Chairman • **D** • Deutsche Gesellschaft für Tourismuswissenschaft e.V. (DGT), Professor Jürgen Schmude, President • **F** • Frankfurter Societäts-Druckerei GmbH, Peter Hintereder, Editor-in-chief • **H** • Heilbronn University – Faculty of International Business, Professor Ralf Bochert, Tourism Management Studies • **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, PATA European Coordinator • **P** • PROJECT M GmbH, Cornelius Obier, Managing Director • **R** • Romantische Strasse Touristik-Arbeitsgemeinschaft GbR, Jürgen Wünschenmeyer, Managing Director • **S** • Schlösser und Gärten in Deutschland e.V. – Association of German Palace Administrations, 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., Ulrich Köster, Managing Director

The GNTB sponsors

Companies and organisations that are interested in the GNTB but do not fulfil the membership criteria have been able to join the GNTB as sponsors since 2009. Corporate bodies, associations and foundations from the worlds of research, consultancy, media, the arts and sport are taking the opportunity to benefit from the GNTB's global sales and marketing network. Sponsors belong to the GNTB's Advisory Board and can use the GNTB sponsor logo in their marketing.

New sponsors in 2017



Heilbronn University's Faculty of International Business

The Faculty of International Business at Heilbronn University offers bachelor's degrees in Hotel and Restaurant Management and Tourism Management and a master's degree in International Tourism Management. 1,500 students from Germany and abroad are currently working towards these qualifications. For the 2017/18 winter semester, the programme will be extended to include a master's degree in Sustainable Tourism Development.

"Our courses are very much applied academic courses. And now we are a GNTB sponsor, we hope to have more opportunities to see our research work being put into practice."

Professor Ralf Bochert, Heilbronn University, Tourism Management Studies



Cittaslow Deutschland e.V.

Towns and communities in over 25 countries have joined together under the Cittaslow umbrella to pledge their commitment to sustainable environmental policy, distinctive townscapes, hospitality, arts and heritage, typical cultural traditions, regional products and regional markets, and to raise awareness of the slow movement. The fact that 17 municipalities in Germany have already joined Cittaslow Deutschland shows how seriously sustainability is being taken in the country.

"A town has to fulfil an extensive list of criteria to join Cittaslow. By becoming a GNTB sponsor, we want to make sure more people know about the commitment our members are making."

Manfred Dörr, Mayor of Deidesheim and Chairman of Cittaslow Deutschland e.V.

Collaborations with tourism partners

Implementation of strategic goals and theme-based campaigns with cooperation partners in 2016:



DIHK and AHK Network

In 2016, the GNTB strengthened its collaboration with the Association of German Chambers of Industry and Commerce (DIHK) and the worldwide network of German chambers of commerce, delegations and agencies (AHK Network). The GNTB's work with the DIHK in Germany was focused on sharing information and collecting and analysing market-relevant data. Both organisations are also opening up their training and professional development programmes to each other. The German chambers of commerce in the international source markets get involved with the tenders that are held periodically to decide who will run the sales and marketing agencies. In those markets where the GNTB already has a foreign representative office, a close working relationship is established

with the chambers of commerce. This involves meeting regularly to hold discussions and share knowledge, as well as arranging events and publications.

GTAI GERMANY TRADE & INVEST

Germany Trade & Invest (GTAI)

GTAI, the economic development agency of the Federal Republic of Germany, and the GNTB signed a cooperation agreement in 2016. From its 50-plus offices around the world and aided by a network of partners, GTAI supports German companies breaking into foreign markets, promotes Germany as a business location and assists foreign companies setting up in Germany.

There are some key areas of overlap between the GNTB and GTAI, namely their mutual interest in the conference industry and Germany's status as the world's number one trade fair location and venue for numerous flagship trade

fairs. Furthermore, the GNTB contributes important information for the GTAI's location marketing. Both organisations also share an interest in international companies that invest in the German tourism industry.

"The network of German chambers of commerce spans 90 countries. When you combine this with the GNTB's extensive expertise in developing and marketing tourism offerings for specific target groups, you have a winning formula for growth in inbound tourism."



Dr Martin Wansleben, Chief Executive of the DIHK

Campaigns with other cooperation partners

Beyond the circle of its members and sponsors, the GNTB is very well connected at an international level. Strong partners provide valuable support in our international marketing activities. Partnerships with product-related, nationwide initiatives and associations provide additional expertise in the development of basic themes and in the delivery of theme-based campaigns.

International partners



Alpine Tourist Commission (ATC) • Atout France • Braztoa Brazilian Tour Operators Association • Czech Tourism • DACH-Meetings • Danube Competence Center (DCC) • Deutscher Olympischer Sportbund/Deutsche Sport Marketing GmbH (DOSB/DSM) • Deutsche Welle (DW-TV) • European Cities Marketing (ECM) • European Travel Commission (ETC) • EU Strategy for the Baltic Sea Region (EUSBSR) • Pacific Asia Travel Association (PATA) • Polnische Organisation für Tourismus (POT)

The hotel and restaurant trades strengthen Destination Germany's appeal by catering to a wide range of tastes

Last year, the hotel and restaurant sector grew by a nominal 2.9 per cent, registering its seventh consecutive year of growth and topping even the fantastic result from 2015. In 2016, Germany's 221,000 hospitality establishments generated annual net revenue totalling €80.9 billion. According to data from the German Federal Statistical Office, revenue generated by Germany's hotel industry grew by a nominal 4.1 per cent to reach €25.9 billion. And with growth of 2.1 per cent last year, the restaurant sector was also able to contribute to the ongoing uptrend in Germany's inbound tourism.

Accounting for 2.1 million employees and 54,000 trainees, the hospitality industry is one of Germany's biggest providers of employment. Over the past ten years, it has created nearly 290,000 new jobs that qualify for social insurance contributions. This represents an increase of 38.5 per cent, compared with just 18 per cent across all industries in the same period.

According to statistics from the German Hotel Association, Germany's nearly 20,600 hotels (with and without a restaurant) currently provide 1.47 million beds in some 800,000 rooms. Figures from the Federal Statistical Office show that the occupancy rate rose from 60.2 per cent in 2015 to 61.8 per cent in 2016. Germany boasts a diverse hotel industry, offering everything from low-cost accommodation to luxury hotels.

Though some locations have problems of overcapacity, the industry as a whole is investing in further growth: according to the German Hotel Association, 571 renovations, extensions and new builds are planned for the next three years that will create just over 85,000 more rooms.



Guido Zöllick, President of the German Hotel and Restaurant Association

The encouraging figures in 2016 are a clear testament to the growing importance of hospitality companies as job creators and contributors to the economy. But further strong results are not a foregone conclusion. The onus is on policymakers to promote entrepreneurial activity rather than burdening companies with endless red tape as well as new taxes and regulations. Enterprise needs freedom and a level playing field. Top of the agenda for the German Hotel and Restaurant Association (DEHOGA) is the reform of the impracticable Working Hours Act. We are also fighting for the long overdue move towards equal tax treatment in the restaurant sector.



Otto Lindner, Chairman of the German Hotel Association (IHA)

The hotel industry in Germany remains on an upward trajectory. Our sector is excellently positioned and is among the best in the world in terms of product quality, range of services and value for money. Nevertheless, clouds are looming over the sector in the shape of rising costs, unfair market practices online and increasing distortion of competition. This makes it all the

more important that hoteliers in Germany are granted greater independence and scope for action. It is down to the politicians to level this particular playing field. Lawmakers must regulate the platform economy, preventing monopolistic structures and competition-limiting clauses, while also creating opportunities for the future.

Sustainability reshaping customer demand

When it comes to sustainability, Germany's tourism offering is very well positioned in the international market. Furthermore, tourism providers are seeing a growing level of consumer awareness of the environment and sustainability – a trend confirmed by the latest research from the German Business Travel Association (VDR).

On the supply side, the GNTB is supporting this trend by working on initiatives with various organizations, including the German Tourism Association's certification scheme. An interactive map showing certified sustainable accommodation – from eco-campsites to luxury hotels – helps tourists, event organisers and journalists to find sustainable accommodation options in Germany and helps with the planning of GNTB fact-finding tours, pre-convention tours, etc.

Authenticity, regionality, seasonality – a recipe for success for Germany's restaurants

The wide range of gastronomy – from simple inn to award-winning restaurant – is one of the strengths of Destination Germany. Authenticity, exemplified by traditional settings or regional and seasonal food, is becoming increasingly available to international visitors. The Michelin

Restaurant Guide currently lists 292 restaurants in Germany with one to three stars – more than ever before. This fact underlines the growth of high-end gastronomy in Germany compared to the international market.

In 2016, prices in the traditional hotel industry rose in line with the anticipated growth in guest numbers: a hotel room (excluding breakfast and VAT) cost on average €93, which represents a 3.5 per cent increase on the previous year. The MKG Group's hotel benchmark indicates that the German pricing structure is nearing parity with the European level (prices across Europe as a whole rose 0.8 per cent to €94).

The sharing economy gives customers more choice and makes the industry work harder

As with many industries, developments in the hospitality trade in 2016 were dominated by the shift in customer practices that has emerged from the increasing use of digital technologies.

The industry believes it will face increasingly fierce competition due to the growing use of booking sites. The German Hotel Association has calculated that online portals now account for 25 per cent of the market. For many customers, the immediate comparability of products reduces their comparison down to one of price. At the same time, the booking sites have exploited their market power to claim they could guarantee best prices. In 2016, the German Office of Fair Trading put an end to anti-competitive best-price clauses.

In terms of the products themselves, the sharing economy is putting pressure on the traditional hotel business. Agents letting private residences give the customer – particularly city break tourists – an authentic travel experience without having to factor in the costs of professional service in hotels and guesthouses.



Daniela Schade, COO Hotel Services AccorHotels Central Europe

“Regional authenticity, experience and atmosphere feature high on the agenda in the development of new hotel products.”

Germany remains a popular destination with visitors from home and abroad, both for business and leisure. In the hotel business, we see this year after year in the shape of record figures. Though we must not forget that our industry is very much subject to change as well. It is important to use the good times to adapt for the future. We are responding to new customer requirements through new lifestyle and experience concepts. Regional authenticity, experience and atmosphere feature high on the agenda in the

development of new hotel products. We also need to adapt to the sharing economy and the customer’s digital journey, and to see these developments as an opportunity rather than a threat. It’s no longer enough simply to be a good host in the traditional sense or to provide a great product. Of course, it is also important that legislators do their bit to ensure competition is fair, either through deregulation or by making all market players subject to the same regulations.

At Deutsche Hospitality, the umbrella brand incorporating Steigenberger Hotels and Resorts, Jaz in the City and IntercityHotel, we too have experienced first-hand the positive trend in Germany’s inbound tourism and the associated growth in revenue.

Our international expansion is advancing rapidly, which is raising the profile of our hotel brands outside of Germany and, in turn, boosting inbound tourism volumes in our many hotels in Germany.

“We too have experienced first-hand the positive trend in Germany’s inbound tourism.”



Thomas Willms, COO Steigenberger Hotels AG

How would you and your organisation sum up 2016 in terms of inbound tourism?

“To strengthen our international competitive standing, we are continually expanding our sales activities.”

2016 was an exceptional year: inbound tourism demonstrated extremely positive growth, in the international source markets we were able to not only match but significantly outperform the fantastic results of 2015. This is primarily down to the high level of growth that we saw from the Asian and American markets. We also saw increases of well over 20 per cent from the Arab Gulf States and from India, which is now one of our 20 biggest inbound markets. To strengthen our international competitive standing, we are continually expanding our sales activities. Our international sales team attended just over 130 workshops, trade fairs and roadshows, including in Mexico for the first time. We also opened a sales office in China. All this puts us in a great position and we expect this positive growth to continue.



Mark Spivey, Director of International Sales, Maritim Hotelgesellschaft mbH

“With our Pleasures of Home package, we have positioned ourselves in the perfect niche.”

We are delighted to see that tourism in Germany has registered record results for the seventh year running – long may it continue. This trend has also benefited lesser known regions, and indeed Ringhotels, by creating opportunities for rural areas. With our Pleasures of Home package, which we launched two years ago, we have positioned ourselves in the perfect niche. Nevertheless, high levels of investment are still necessary for survival in the market, for instance to keep up with the growing use of digital technologies and the associated increase in competitive pressure. We feel that our investments in recent years have prepared the Ringhotels brand for the future.



Susanne Weiss, Chief Executive Officer of Ringhotels e. V.

And what trends and challenges do you anticipate for 2017?



Bart P.M. Beerkens, Commercial Vice President of GCH Hotel Group

“For many years, GCH has placed great importance on running a sustainable and environmentally-friendly business.”

In terms of occupancy rate, turnover and revenue per available room, 2016 was one of the GCH Hotel Group’s best ever years and a clear reflection of the trend reported by the German Federal Statistical Office. Capital expenditure at GCH last year was fo-

cused less on volumes and more on quality, service, technology, efficiency, skilled workers and renovations. GCH is now also increasingly marketing itself as a B2B service provider with expertise in management.

For many years, GCH has placed great importance on running a sustainable and environmentally-friendly business. In 2016, we began the process of successively inducting all GCH establishments into the Earth Check scheme, a globally recognised sustainability certification. In the F&B sector, we invested in quality standardisation last year. For instance, all our hotels now offer the same wine, dessert and snack menus, which are developed by F&B directors at head office. There is also a cost-focused purchasing team at head office responsible for all hotel departments.

Whether visiting from abroad or exploring their own country, travellers in Germany value the variety of tourist offerings more than anything, and count on finding strong brands. The hotel industry picked up on the German tourism trend many years ago. And it is primarily the medium-sized establishments and family-run businesses that provide tourists from all over the world

“The hotel industry picked up on the German tourism trend many years ago.”

with the authentic travel experiences that they are looking for. High-quality packages, products and services build trust and guarantee quality, safety and satisfaction. As the backbone of Germany’s tourism industry, hoteliers and restaurateurs are in a prime position to have another record-breaking year.



Thomas Edelkamp, CEO, Romantik Hotels & Restaurants AG

Sales and marketing strategy

Using modern tools to create a distinctive presence



Thuringia, Wartburg Castle near Eisenach

The digital strategy is leading the way in the GNTB's marketing

The GNTB uses a range of tools that it continually fine-tunes to target its marketing messages to the relevant markets and groups. The strategic approach taken in the worldwide marketing of Germany as a travel destination is based on systematic market analysis and market assessment. Market research at the GNTB draws on a wide range of sources in Germany and abroad. The findings are evaluated in order to determine market-specific opportunities and risks and to decide on recommended courses of action.



Digital media is paving the way for an efficient consumer strategy.

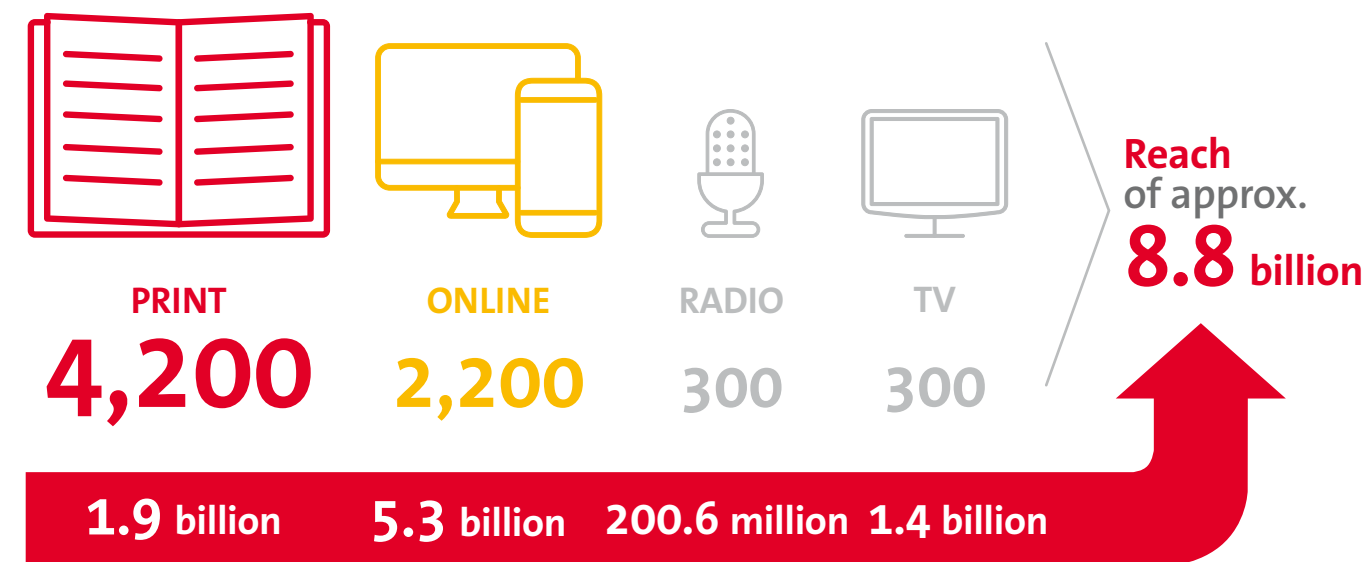
The GNTB's **international marketing activities** are **tailored to the respective market** and implemented using a wide range of marketing tools for the **three pillars of communication: consumers, the travel trade and the media.**

Fast and targeted marketing

The GNTB primarily reaches out to consumers in the various markets using online marketing. The main medium is its website www.germany.travel. It is also increasing the degree to which it cooperates with travel platforms and websites worldwide. 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. In addition, advertisements in selected traditional media. Promotional activities complete the marketing portfolio aimed at consumers around the world.

GNTB press work

The GNTB spreads its message via **7,000 media** worldwide, including



Multiplier strategy:

Direct personal targeting of key accounts

The GNTB website is also the primary platform for communicating with the global travel industry (B2B). Information is also provided by a wide range of online tools. 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.

Press and PR:

Rapid online access to the latest information coupled with an individual focus

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 here. Theme-specific PR events in the markets and press highlight tours in Germany provide more in-depth information on Destination Germany as well as focusing the attention of a select group of journalists on the GNTB's core themes.

Online marketing strategy

Around 3.6 billion people globally – more than half 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 use the internet while planning their trip, either to find information or make a booking. The proportion of internet users rises to 85 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.



Mobile version of www.germany.travel

35 country-specific websites
30 languages

Market-specific mobile sites

2016: Tailoring themes to specific markets

9.9 million visitors

20 million page impressions

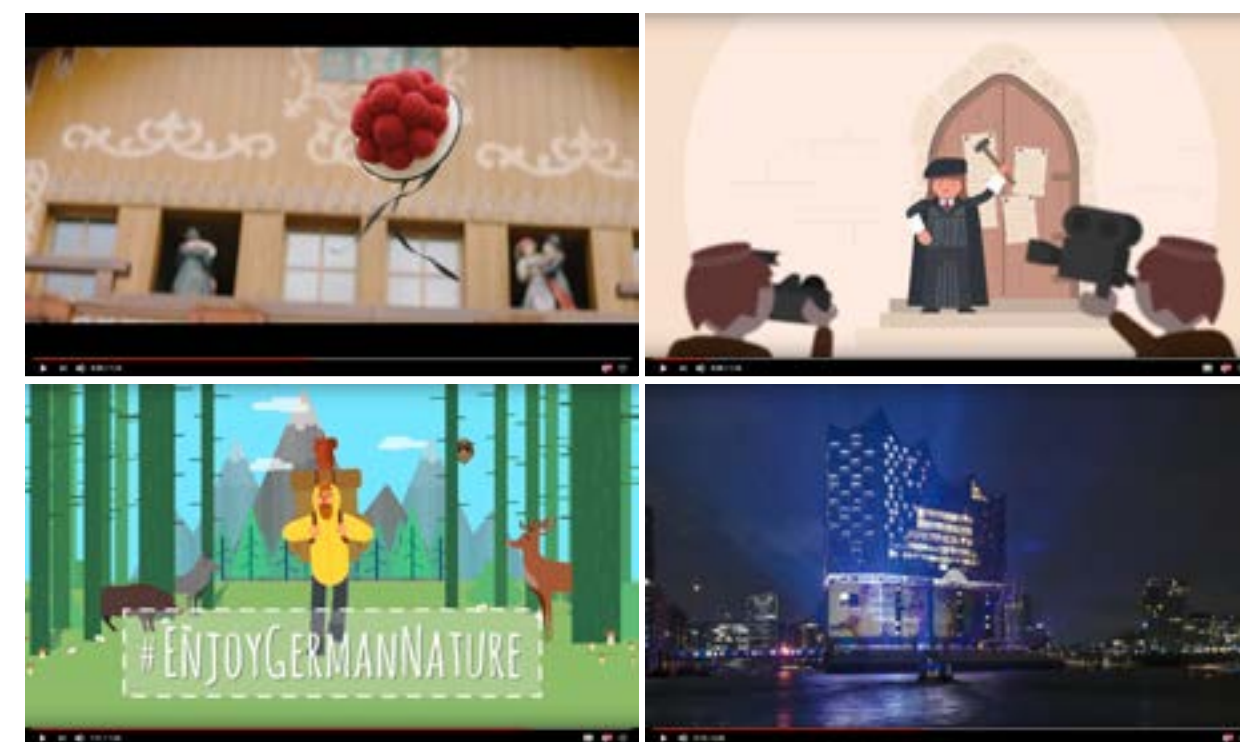
Fast access to relevant content

Integration of mobile-optimised microsites

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. The variety of languages available ensures potential customers in a wide range of countries have access to comprehensive information, and it also improves the search engine ranking in the different markets, thereby attracting more traffic.

The GNTB website’s strengths lie in its contemporary multimedia presentation of Germany. In particular, the updated, user-friendly mobile domain sets new standards in this regard. Optimised interactive maps include a multitude of points of interest that lead to over 12,000 pages of in-depth content and make it easier for users to plan their trips. An internal search function provides easy access to all of the information.

Media gallery with navigation by theme:
 over **600** videos
 and **12,000** photos
 and **265** 360-degree panoramas and videos



Examples of GNTB videos: Inspiration is HERE – Wherever you travel in Germany, Martin Luther – 500th anniversary of the Reformation, Enjoy German nature, A journey through the night.

The playful approach of the destination finder used in the 2016 campaign ‘Holidays in the heart of nature in Germany’ shows how filters enable customers to take quick first steps in planning their travels. The film and video offering is continually being expanded; 2016 saw the production of additional short films focused on urban centres and Germany’s romantic character. The clips were deployed internationally through social media and programmatic marketing.

The GNTB publishes its own newsletters to enhance communications and the Destination Germany brand. In 2016, it also introduced a new global newsletter system that uses automatically generated interest profiles to make the content even more targeted. The new system is linked to the campaign and website target measurement system. Initial analyses show that the quality of the traffic achieved

through pre-existing customer relationships is markedly better than that obtained through Google, for example. In addition, the GNTB attracts new customers by using targeted online marketing campaigns on websites that are relevant to its themes. Google AdWords and Display campaigns and programmatic marketing campaigns are also used successfully.

Eight areas of activity in the GNTB's online marketing strategy



WEBSITE www.germany.travel

The GNTB's primary online marketing platform, providing inspiration and information ahead of a trip.



MOBILE WEBSITE

The future of the GNTB's online marketing

Quickly accessible information in a condensed format; 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.



APPS

Provide local information to complement the website; their added value lies in the locational data, event details, timetables and insider tips that they contain.



CONTENT

Multi-language functionality is to remain a long-term USP; main languages are selected on the basis of market research and website statistics; scope of content is determined by SEO relevance.



SOCIAL MEDIA

Used to disseminate accurate, factual information about Destination Germany around the world; user-generated content gets people talking about Germany.



ANALYSIS

A new market-specific dashboard is being used to monitor traffic, broken down by campaign; existing analyses are being extended to include engagement while retaining the performance KPIs.



MARKETING

Positioning Germany travel as a website targeted at keen international travellers with an interest in Germany.



INTEGRATION OF PARTNERS

In-depth information featured on GNTB platforms; joint marketing campaigns with members and partners

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.

The content provided online by the GNTB on the various themes is complemented by a steady stream of user-generated content obtained through social media activities. This increases the breadth of information available, which is then summarised on social walls. 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

As a strategic element of corporate communications that is integral to online marketing, social media marketing (SMM) helps 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 and awareness of Destination Germany. Through social media marketing, key communicators ('influencers') also generate content that contributes to the perception of Germany as an attractive travel destination. 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 most significant trends of 2016:

Influencer relations

New platforms **Storytelling**

Ephemeral content

Ephemeral content = content that disappears after a short time, e.g. Snapchat or Instagram stories



Number of followers on the Instagram account **@germanytourism**

increased from 50,000 to over **120,000** in 2016

over **1.6 million likes** for posts on the GNTB Instagram account



6,900 Facebook posts in 2016 (+63%)

reach of over **167 million** (+211%)

GNTB social media platforms

18 Facebook pages



Markets: Australia, Austria, Belgium, Brazil, Czech Republic, Denmark, France, Hong Kong, Hungary, India, Italy, the Netherlands, Norway, Poland, Singapore, Spain, Sweden, Switzerland, the UK and the USA

6 Twitter accounts



Languages: Dutch, English, German, Japanese, Portuguese and Spanish



An international **Instagram account**

One

YouTube channel

one

Snapchat account and

one

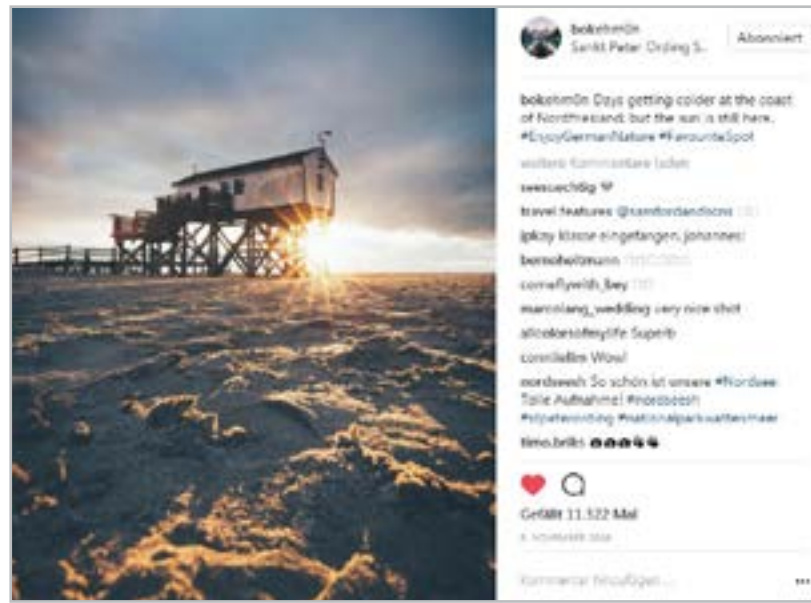
Pinterest account

as global platforms

Market-specific platforms in China: **Weibo** and **WeChat**

Current social media trends integrated into GNTB marketing

In 2016, the GNTB continued to expand its work with influencers and ran a total of 95 influencer trips and campaigns, providing content for all major platforms. Snapchat, Instagram, YouTube, Facebook and Twitter were the most prominent platforms, but blogs continued to play a key role as well. Many of the trips and campaigns were transmedial in nature, with travel stories told across several platforms used by the influencers. For example, the GNTB ran a campaign themed around street and urban art. Snapchat was mainly used to provide live coverage of the trip, while the blog entries provided permanent content.



For 'Holidays in the heart of nature in Germany', the GNTB's campaign for 2016, influencers explored 16 regional highlights to generate content and boost the campaign's reach on social media.

The **reach** of all GNTB social media platforms spans **400,000,000 users**



The activities of carefully selected influencers and the content that they generate broaden the range of communication and reinforce the message of the theme-based campaigns. This personalised content is the ideal counterpart to the wealth of themed content available at www.germanytravel.

A social media post on the GNTB campaign 'Street & Urban Art'

Storytelling

A further central aspect of social media marketing in 2016 was the increasing use of storytelling. Under the banner 'Discover your favourite spot', influencer campaigns were organised so that the core narrative of the campaign could be communicated in various ways in the form of authentic stories.

2017: Communications campaign launched to strengthen brand image

#GermanySimplyInspiring

In 2017, the GNTB initiated a large-scale communications campaign under the banner of 'Germany Simply Inspiring'. The overarching campaign story 'Inspiration is here' showcases the variety that Destination Germany has to offer with various themed videos, posts and adverts on social media.

Themes

- Food and drink
- Palaces, castles, parks & gardens
- Music and shows
- Traditions and customs

Focus on social media

- Themed videos on Facebook and Instagram
- Promotional videos on Facebook and YouTube
- Themed canvas and carousel ads

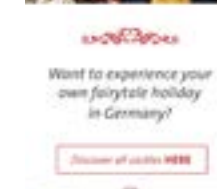


Initial key markets are the top ten markets for inbound tourism to Germany

Netherlands, Switzerland, USA, United Kingdom, Austria, Italy, France, Denmark, Belgium and Spain



Canvas ad for the 2017 communications campaign 'Germany Simply Inspiring'



Sharing experiences: Digital Days, 22 and 23 June 2016

The GNTB's established 'online day' and 'social media day' events were expanded into the 'digital days' in 2016.

- Two days of workshops
- Focus on customer experience
- 70 participants from the tourism marketing sector

GNTB experts in online marketing and social media marketing focused on a customer-centric strategic approach in the use of the various platforms and on maintaining a seamless presence throughout the customer's digital journey. Bruno Maltor, a travel influencer from France, gave a presentation on best practice in the use of Snapchat as part of a joint initiative with the GNTB. The event also provided the perfect opportunity to officially launch the GNTB Snapchat account with its first snap.

Laura-Marie Arens, Hotel Ads Business Leader EMEA at Google Germany, spoke on the subject of 'Google, travel and the customer experience'. Eckart Estenfelder, product manager at Deutsche Bahn, gave a presentation on 'd.lab, the innovation laboratory of Deutsche Bahn'.

Destination Germany at selected international flagship trade fairs

As part of the ongoing refinement of its sales and marketing strategy, the GNTB limited 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 2016 – the GNTB's theme-based campaigns at the world's biggest tourism trade fair

International press conference on the opening day

- International press conference attended by around 100 media representatives
- Core message: the GNTB presents record results – almost 80 million international overnight stays for the first time
- Sixth record result in a row
- Overseas markets continue to show strong growth

Discussion and dialogue at the parliamentary breakfast

- Around 50 invited guests, including parliamentarians and staff from the German Bundestag and the Federal Ministry for Economic Affairs and Energy who met with senior GNTB managers
- Tourism policy spokespersons for Germany's political parties presented their positions and commended the work of the GNTB

Parliamentary evening held in conjunction with Messe Berlin

- Networking events held by the GNTB and Messe Berlin well attended by numerous decision-makers from the industry
- Ernst Fischer, President of the German Hotel and Restaurant Association (DEHOGA), receives an award from the Tourism Committee of the German Bundestag

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

- Fifth time the event is held as part of the ITB congress

Setting the agenda with workshops and roadshows

42nd GTM Germany Travel Mart™ in Saxony-Anhalt

Around 600 hosted buyers and journalists from 45 countries took up the GNTB's invitation to attend Destination Germany's flagship B2B platform. Magdeburg, the state capital of Saxony-Anhalt, hosted the event. The central element of the GTM was the two-day inbound tourism workshop at the Messe Magdeburg trade fair centre, which gave exhibitors and buyers plenty of opportunities to network, cultivate new business and close deals. As in previous years, the GNTB ran the 42nd GTM as a green event.



- Over 18,000 meetings arranged using the GNTB's online networking tools
- Survey of suppliers immediately after the event: 89 per cent of participants were 'satisfied' or 'very satisfied' with the 2016 GTM
- Nearly 90 per cent of exhibitors said they wanted to also attend the 2017 GTM in Nuremberg
- Almost 70 per cent have already decided that they will definitely attend the next GTM

Social media activities for the GTM

- Live feeds via Twitter and Storify
- Around 700 tweets using the hashtag #gtm16 before, during and after the GTM
- Reach via Twitter: more than 120,000 users and one million impressions
- Feeds at www.germany.travel/gtmlive accessed more than 1,500 times



Looking ahead to 2017: Nuremberg

The GTM Germany Travel Mart™, the largest inbound tourism workshop for Destination Germany, took place from 7 to 9 May 2017 in Nuremberg, Bavaria. The GNTB organised the event together with BAVARIA TOURISM and the Nuremberg Convention and Tourist Office.

Trade fairs and workshops

2017/2018

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.

TRADE FAIRS

Germany	Berlin	T	ITB Berlin	7 – 11 Mar 2018
Germany	Frankfurt am Main	T	IMEX Frankfurt	15 – 17 May 2018

GERMANY WORKSHOPS

Germany	Dresden	W	GTM Germany Travel Mart™	6 – 8 May 2018
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REGIONAL MANAGEMENT NORTH EAST EUROPE

Russia	Moscow	W	Medical Tourism Workshop Moscow	7 Sep 2017
Russia	St. Petersburg, Moscow, Kiev	R	Russia and Ukraine Roadshow	9 – 13 Oct 2017
Northern Europe	Copenhagen	W	North Europe Workshop	23 – 24 Oct 2017
Poland	Warsaw	W	Trade Event & Workshop	13 – 14 Nov 2017
Russia	Moscow	W	B2B Workshop German Travel Industry Day during MITT Moscow	15 Mar 2018

REGIONAL MANAGEMENT NORTH WEST EUROPE

Netherlands	Amsterdam	W	Trade Workshop / ReisMarkt Duitsland	21 Nov 2017
Belgium	Brussels	W	Trade and Travel Agency Workshop	22 Nov 2017
United Kingdom	London	W	Germany Travel Show London	1 – 2 Feb 2018

REGIONAL MANAGEMENT SOUTH EAST EUROPE

Romania	Timisoara, Sibiu and Cluj	R	Romania Roadshow	September 2017
Austria	Vienna	T	FERIEN-Messe	11 – 14 Jan 2018
Romania and Bulgaria	Bucharest and Sofia	R	Balkans Roadshow	February 2018
South East Europe	Belgrade	T	IFT International Tourism Fair	February 2018



REGIONAL MANAGEMENT SOUTH WEST EUROPE

Italy	Rimini	T	TTG Incontri	12 – 14 Oct 2017
Spain	Madrid, Barcelona	W	'Meet Germany' Trade and Travel Agency Workshop	18 – 19 Oct 2017
Spain	Barcelona	T	ibtm world, Barcelona	28 – 30 Nov 2017
France	Strasbourg, Lyon, Paris	R	Roadshow	24 – 26 Jan 2018
Switzerland	Zurich	T	FESPO	25 – 28 Jan 2018

REGIONAL MANAGEMENT AMERICAS / ISRAEL

USA/Canada	Vancouver, Seattle, Portland, Universal City	R	Destination Germany West Coast Roadshow	11 – 14 Sep 2017
Brazil	São Paulo, Rio de Janeiro	R	Destino Alemanha Roadshow – Brazil	20 – 21 Sep 2017
South America	Santiago de Chile, Buenos Aires	R	South America Roadshow	25 – 26 Sep 2017
USA	Los Angeles	T	IMEX America	10 – 12 Oct 2017
Israel	Tel Aviv	W	Israel Workshop	May 2018

REGIONAL MANAGEMENT ASIA / AUSTRALASIA

India	Delhi, Ahmedabad, Mumbai	R	India Roadshow	4 – 8 Sep 2017
South East Asia	Bangkok, Kuala Lumpur, Jakarta, Singapore	R	ASEAN Roadshow	16 – 20 Oct 2017
Arab Gulf States	Riyadh	W	Saudi Arabia Workshop	29 Oct 2017
Arab Gulf States	Kuwait, Dubai, Abu Dhabi	R	Dallal fi Almanian – Gulf States Roadshow	30 Oct – 1 Nov 2017
Arab Gulf States	Muscat	W	Oman Workshop	2 Nov 2017
China/Hong Kong	Beijing, Shanghai, Chengdu, Guangzhou	R	China Roadshow	13 – 17 Nov 2017
China/Hong Kong	tba	R	Spring Roadshow China	Spring 2018
Arab Gulf States	Dubai	T	ATM Dubai	22 – 25 Apr 2018
China	Shanghai	T	ITB China	16 – 18 May 2018
Japan	tba	R	Germany's South Roadshow	Spring 2018
Australia	tba	R	Australia Roadshow	tba

* T = Trade fair/exhibition W = Workshop R = Roadshow

Inbound tourism: the regional view



blue fire Megacoaster powered by GAZPROM

Baden-Württemberg

Andreas Braun, Managing Director of Tourismus Marketing GmbH Baden-Württemberg



Europa-Park is one of Germany's most popular travel destinations, attracting over five million visitors to Baden-Württemberg every year. Roughly half of them travel from abroad. The park is particularly popular with our neighbours from Switzerland and France. Through all its successes Europa-Park has remained a family business that has combined a sense of tradition and innovative enterprise for over 40 years. It regularly ranks among the most popular attractions in the GNTB's survey of Germany's top 100 sights.



Berlin

Burkhard Kieker, Managing Director of visitBerlin

24/7, 365 days a year: there's never a dull moment in Berlin: There is always something going on in Germany's capital city, from events and entertainment to attractions and the arts. Berlin is the city that never sleeps. It boasts a hugely diverse range of museums, for instance. Three opera houses cater for sophisticated tastes, while the many nightclubs embrace the spirit of the subculture. The breadth of choice in Berlin is hard to beat. You'll find so much of the world here.



Bode Museum and TV Tower



Brandenburg

Dieter Hütte, Managing Director of Tourismus Marketing Brandenburg GmbH

In 2017, Brandenburg is putting the spotlight on garden designer and globe-trotter Prince Hermann von Pückler-Muskau, with exhibitions dedicated to him in Babelsberg Palace and Branitz Palace. The parklands designed by the prince provide a stunning example of how nature and culture can become one. He once wrote, "a park should be like an art gallery, a new picture to see every few steps." It is a sentiment that his gardens certainly live up to.

Babelsberg Palace



Bavarian gemütlichkeit in the beer garden

Bavaria serves the most famous food in Germany, and its culinary fame extends far beyond national borders: 41 per cent of visitors come to Bavaria to enjoy our gastronomic delights. Weisswurst sausage, pretzels and obatzda, hearty dumplings and delicious fish and meat dishes – these regional specialities are as much part of Bavarian life as the friendly locals. After all, good food is best enjoyed with good company in a tavern or a beer garden. The local dishes taste best with some Franconian wine, traditionally served in bulbous bottles called bocksbeutel, or with a traditional Bavarian beer from one of more than 600 regional breweries.

Bavaria

Jens Huwald and Dr Martin Spantig, Managing Directors of BAYERN TOURISMUS Marketing GmbH



The volume of travellers and overnight stays continues to rise in Saxony-Anhalt, with new record results for 2016. Bolstered by the Reformation and Holidays in Nature marketing themes, the regions of Anhalt-Dessau-Wittenberg, Halle-Saale-Unstrut and the Harz mountains proved particularly popular with visitors.

In 2017, Saxony-Anhalt is marking the 500th anniversary of the Reformation with a national exhibition at the Augusteum in Wittenberg and a number of other events. Saxony-Anhalt is showcasing itself as the birthplace of the Reformation by promoting its sites of historical importance, including Eisleben where Luther's life began and ended, and Wittenberg Castle Church where he famously nailed his 95 theses to the door.

This is helping us to attract thousands of tourists from all over the world.



Saxony-Anhalt

Bettina Quäschning, Acting Managing Director of Investitions- und Marketing-gesellschaft Sachsen-Anhalt mbH



Museum at Martin Luther's birthplace in Eisleben



Bremen

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

Two cities – one state: The sights and attractions of Bremen and Bremerhaven have long been a magnet for tourists. Ever since Bremen's town hall and Roland statue were designated a UNESCO World Heritage site, the city has seen its visitor numbers grow year after year. Bremerhaven's biggest attraction is the Harbour Worlds complex. The Klimahaus 8° Ost there is a particular highlight. It offers a journey through the world's climate zones, while the German Emigration Centre recounts the fascinating stories of people leaving for the new world.



German Emigration Centre, Bremerhaven

Schleswig-Holstein

Frank Behrens, Interim Managing Director of Tourismus-Agentur Schleswig-Holstein GmbH (TA.SH)

Kiel Week: With its blue and white keels, centreboards and fins, the branding for the 2017 Kiel Week regatta represents a powerful marketing tool. The regatta is the world's biggest competitive sailing event, with more than 3,500 sailors from over 50 countries taking to the water.

Back on dry land, more than 2,000 events celebrating sports, the arts, music, science and business help to make the regatta the biggest summer festival in northern Europe, attracting in excess of three million guests from all over the world. Kiel Week regatta captures the cosmopolitan and welcoming nature of Schleswig-Holstein, Germany's true north.



Kiel Week regatta



Geierlay rope bridge at the Hunsrück-Hochwald National Park

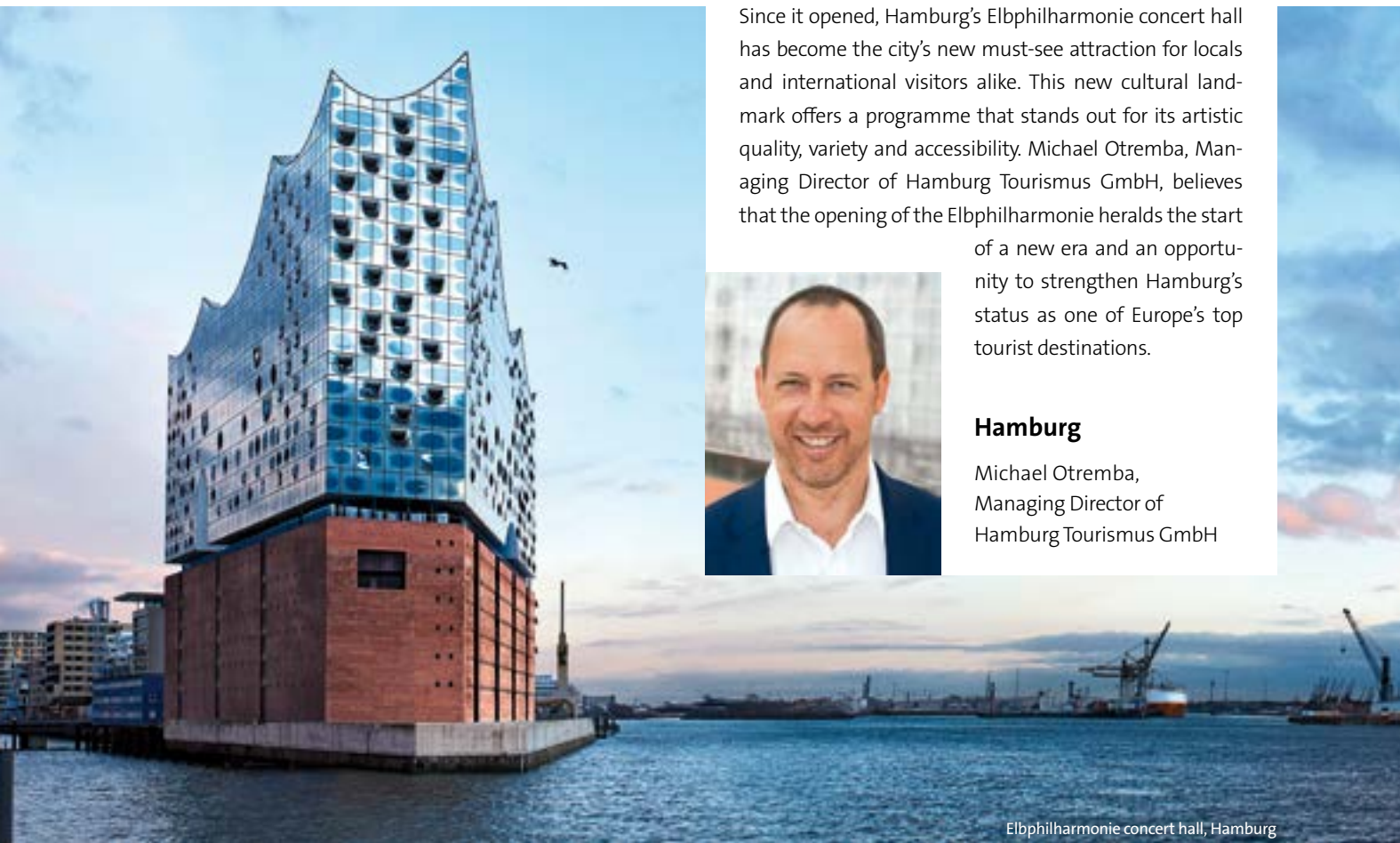
Rhineland-Palatinate

Stefan Zindler, Managing Director of Rheinland-Pfalz Tourismus GmbH

Inbound tourism in Rhineland-Palatinate is thriving thanks to the region's rich and varied scenery and diverse landscapes. The Hunsrück-Hochwald National Park gives an added boost to our international image as a destination for active holidays in the great outdoors.

It is not only home to native beech trees but is also the largest wildcat habitat in western Europe. A wide range of public guided tours and private ranger tours give people the opportunity to experience the national park in all its glory. Just a small but worthwhile detour from the national park is Geierlay, Germany's most spectacular rope bridge, which attracts visitors from near and far.





Since it opened, Hamburg's Elbphilharmonie concert hall has become the city's new must-see attraction for locals and international visitors alike. This new cultural landmark offers a programme that stands out for its artistic quality, variety and accessibility. Michael Otremba, Managing Director of Hamburg Tourismus GmbH, believes that the opening of the Elbphilharmonie heralds the start



of a new era and an opportunity to strengthen Hamburg's status as one of Europe's top tourist destinations.

Hamburg

Michael Otremba,
Managing Director of
Hamburg Tourismus GmbH

Elbphilharmonie concert hall, Hamburg

The UNESCO World Heritage Wilhelmshöhe Park has become a flagship destination for tourism, popular for its unique blend of culture and nature. The museum scene in Kassel is second to none, with the documenta exhibition a major highlight for art lovers. The Hessen region is perhaps best known as the home of the Brothers Grimm, but that's not all. In 2017, Kassel is celebrating the 300th anniversary of its famous Hercules statue. For nature at its untamed best, there is also Kellerwald-Edersee National Park, which was named one of the world's most beautiful forests by Geo magazine.

We see this as the result of a well-executed brand concept – the north Hessen region was a deserved winner at the 2016 Kulturmarken Awards.



Hessen

Herbert Lang, Head of Tourism and Conference Marketing, and Folke Mühlhölzer, Managing Director of HA Hessen Agentur GmbH



Kassel, Devil's Bridge at UNESCO World Heritage Wilhelmshöhe Park

The Saar Bow is one of Germany's most exquisite natural wonders and, alongside the World Heritage Völklingen Ironworks, it is the most important sightseeing attractions in the Saarland. For visitors to the region, looking out over the Saar Bow is always an unforgettable highlight. The canopy walkway has made a massive contribution to raising the profile of this natural spectacle and the surrounding countryside. The walkway snakes some 800 metres through the mixed forest of beech trees, oaks and Douglas firs that is so typical of the region. The path ends at the top of the 42-metre-high viewing platform overlooking the breathtaking scenery of the Saar Bow valley.



Saarland

Birgit Grauvogel, Managing Director
of Tourismus Zentrale Saarland GmbH



Treetop trail with view over the Saar Bow



Jahrhunderthalle, Bochum

North Rhine-Westphalia

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

The Route of Industrial Heritage attracts visitors from Germany and further afield. Last year, a record number followed the route and its 25 attractions, with 6.5 million people visiting the museums and former industrial sites. These include the Zollverein coal mine complex, which is just one of the World Heritage sites in North Rhine-Westphalia contributing to the region's continued growth in inbound tourism. In 2016, North Rhine-Westphalia registered a total of 10.4 million overnight stays by international guests.





Mecklenburg-Western Pomerania

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

Mecklenburg-Western Pomerania – a water paradise:

As well as nearly 2,000 kilometres of coastline, Mecklenburg-Western Pomerania boasts more than 2,000 lakes

and 26,000 kilometres of rivers and streams. Around the world, more and more people are hearing about the Mecklenburg Lakes thanks to the exceptional infrastructure and water quality there. The area is particularly popular for house boat holidays, for which no licence is required. Travellers from Switzerland, Austria and the Netherlands are especially fond of our lakes. It is crucial that our extensive network of marinas, locks and waterways is carefully maintained – crucial for tourism and therefore for the economy and life in the region.



Müritz National Park, Mecklenburg Lakes

Brühl Terrace, Dresden



Saxony

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

Time and time again surveys reveal that nearly all international visitors to Saxony come for the region's exceptional cultural attractions. Leipzig has its Gewandhaus concert hall, its Bach Archive and its Baumwollspinnerei workshops and galleries; Chemnitz has its art collections and its Gunzenhauser Museum; and Dresden has its Semper Opera House, its Church of Our Lady, its Kraftwerk Mitte club and its new concert hall in the Kulturpalast, and of course the ultimate cultural attraction, the Dresden State Art Collections.



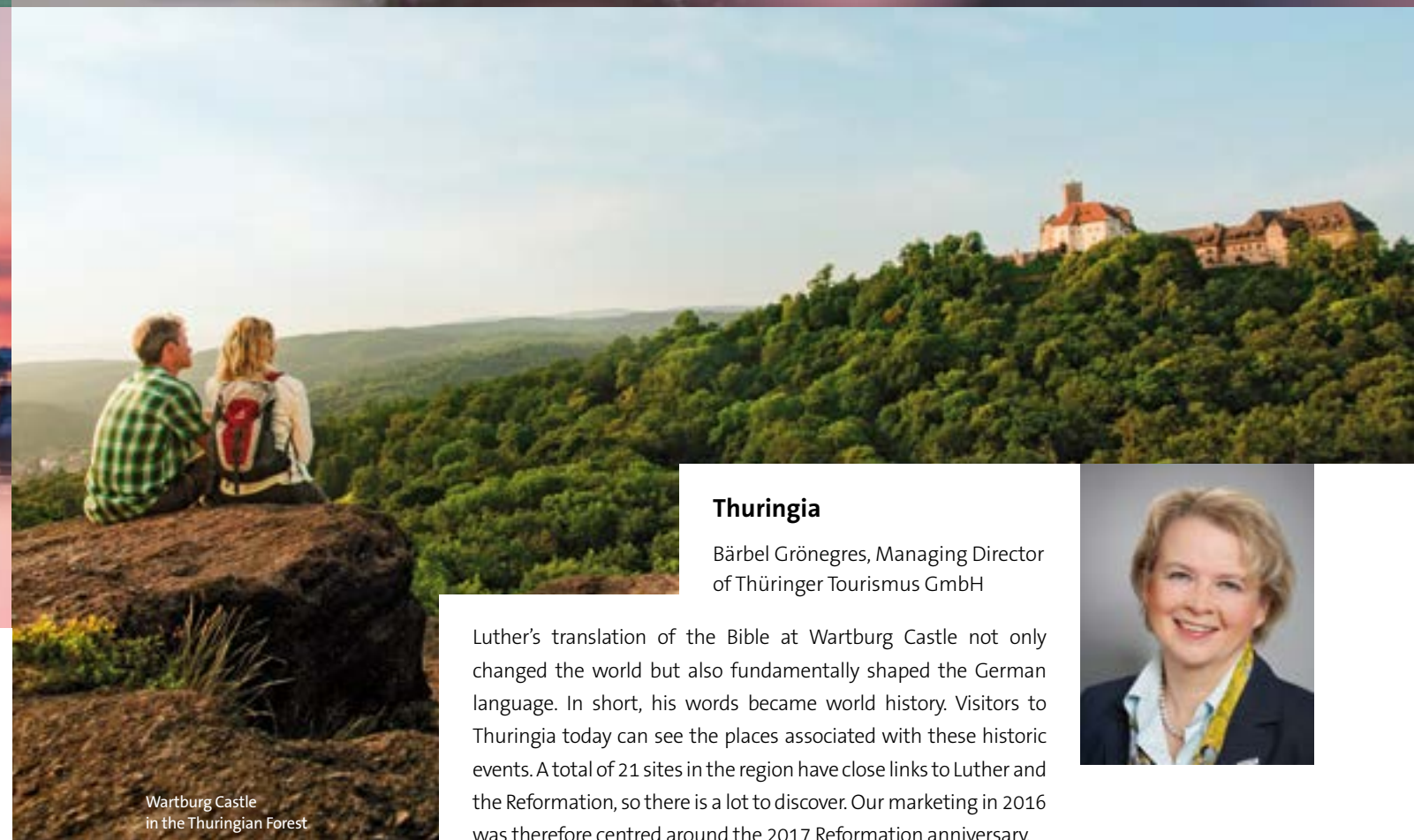
Lower Saxony

Carolin Ruh, Managing Director of TourismusMarketing Niedersachsen GmbH

In 2016, the Hannover Messe trade fair attracted a great deal of media attention because of a very special visitor. The USA, which was the partner country to the event, was represented by then president Barack Obama. Images of him standing in front of the baroque Royal Gardens of Herrenhausen went around the world, and left a lasting impression. The positive media coverage cemented Hannover's status as the world's leading venue for trade fairs, and provided an opportunity to showcase Lower Saxony's tourist attractions and its cultural appeal.



Herrenhausen Palace, Hannover



Wartburg Castle in the Thuringian Forest

Thuringia

Bärbel Grönegres, Managing Director of Thüringer Tourismus GmbH

Luther's translation of the Bible at Wartburg Castle not only changed the world but also fundamentally shaped the German language. In short, his words became world history. Visitors to Thuringia today can see the places associated with these historic events. A total of 21 sites in the region have close links to Luther and the Reformation, so there is a lot to discover. Our marketing in 2016 was therefore centred around the 2017 Reformation anniversary.





Brand development and perspectives

A strong brand
for a strong future

Incoming and Brand Summit

8 and 9 December 2016
in Munich



Expert speakers involving the audience in their presentations

Instagram
381,188 likes
on Instagram

Facebook
20,401 likes
on Facebook

Twitter
2,925 likes
on Twitter

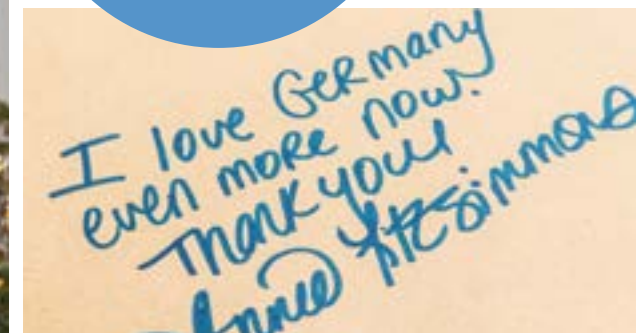


Petra Hedorfer, Chief Executive Officer of the GNTB, at the 2016 Incoming and Brand Summit

Destination Germany is extremely well positioned in the international tourism market. In the face of growing challenges, the brand must be dynamic and strong and have a distinctive profile in order to maintain its high level of appeal. In 2016, the GNTB developed a format, called the Incoming and Brand Summit, to prepare the Destination Germany brand for the future.



Geraldine Knudson, Director of Tourism at Munich's Department of Labour and Economic Development, and Jens Huwald, Managing Director of Bayern Tourismus Marketing GmbH, at the evening event held at BMW Welt



Intensive networking in the Dialogue & Engagement room



@gntblive
64,579 page impressions
for the summit

Around 50 journalists reported on the event for leading national newspapers and business media, such as The Guardian and The Independent from the UK, La Stampa from Italy, Der Kurier and Die Kronen Zeitung from Austria, Polytika from Poland and De Volkskrant from the Netherlands.

**8 experts –
8 perspectives**



“Isolated events only have a short-term impact on travel patterns; the economic climate is a far greater influence.”

Rich Maradik, CEO, nSight for Travel, Nashville



“German cities score highly in the City Brands Index, with Berlin ranking seventh in the world and Munich 18th.”

Vadim Volos, Global Director, Anholt-GfK Nation Brands Index and City Brands Index; Senior Vice President Public Communications & Social Science (PCSS), GfK Custom Research, New York



“Social media is essential for the travel industry; the challenge lies in making use of the customer data. Brands that can exploit source market data for their destination marketing will gain a competitive advantage.”

Simon Lehmann, President, Phocuswright, New York



“Environmental responsibility, modern technology and traditional crafts are just some of the brand values that matter to Ayinger.”

Franz Inselkammer Junior, Managing Director, Ayinger Brewery



“I want my videos to prove that travel is for everyone. And that what’s possible for one person, is possible for all of us.”

Alex VIZEO, travel blogger and influencer – Vizeo.net



“Every destination should focus their efforts on making their best content visible – to the right target demographic and at the right time.”

Justin Reid, Head of Destination Marketing, Europe, Middle East & Africa, Tripadvisor.com, London



“Germany has been ranked the world’s second best destination for conferences.”

Matthias Schultze, Managing Director, German Convention Bureau



“Our brand portfolio is always growing – with the addition of not only strong automotive brands but also pioneering mobility solutions.”

Bill McAndrews, Vice President of Communications Strategy, Corporate and Market Communications, BMW Group

95 media representatives from 19 countries



2 day conference **3** post-convention tours **1** theme evening

CONCLUSION

Destination Germany is a **strong and attractive brand** and will therefore **continue to be successful**.

Economic stability and prosperity in the source markets are the biggest levers for travel, and therefore boost **inbound tourism** in destinations such as Germany.

Security concerns following attacks or periods of unrest **only affect travel patterns temporarily**, provided incidents are isolated and the infrastructure remains intact.

Theme-based marketing

New perspectives for a fresh brand image



Review of the 2016 theme-based campaigns:

Holidays in the heart of nature in Germany

More than a third of Germany's land area is under special protection within national parks or nature parks. The GNTB harnessed this responsible and uncompromising approach to nature with the theme-based campaign 'Holidays in the heart of nature in Germany' to reinforce the country's status as a sustainable travel destination and to further promote holidays in rural regions.

The campaign was focused on **12 key markets** in Europe.



Digital presentation of Germany's landscapes

As an online campaign 'Holidays in the heart of nature in Germany' mainly focused on digital forms of communication. Central to the campaign was the destination finder, which helped users to locate their own favourite spots in Germany's protected landscapes so they could enjoy the great outdoors to the full.

- Expanded content at www.germany.travel/nature
- Interactive map pinpointing national parks and other protected landscapes, as well as in-depth content in various languages
- Destination finder: with its range of filter functions, this tool gave users a fun way to explore the tourist profiles of Germany's protected landscapes, find their own personal favourites online and share them with their friends on social media
- International campaign video showcasing lesser-known experiences in Germany's natural landscapes



GNTB marketing initiative – Facebook competition, 16 questions about the 16 featured landscapes

User-generated content created by influencer trips, in which the protagonists (bloggers, Instagrammers) described their experiences and their search for new favourite locations. This content was collated in a dedicated social media feed using the campaign hashtag #EnjoyGermanNature at www.germany.travel/enjoygermannature.



On **Instagram alone**
10,000
user-generated posts in 2016

by May 2017 a further
16,257 posts

about holidays in nature in Germany had been registered on other platforms

Facebook competition in 11 key markets with 44,300 entrants
Reach of 3.8 million

43 individual press trips and 7 highlight tours with 90 journalists
Reach of 37.5 million

224 PR events attended by 2,132 media representatives
Reach of 1.9 billion

Press tours in the 16 featured landscapes
Reach of 11.5 million

Our expert partners

- EUROPARC Germany – umbrella association of national protected landscapes
- Association of German Nature Parks
- Regional marketing organisations of the federal states
- Federal Ministry for the Environment, Nature Conservation, Building and Nuclear Safety (BMUB)

More than **130** national protected landscapes:
16 national parks, over **100** nature parks and
15 UNESCO biosphere reserves

Schleswig-Holstein, Westerhever Lighthouse

Basic themes

The GNTB has developed two product lines, 'towns, cities & culture' and 'nature & relaxation', which are derived from the megatrends in our society today of culture and health. Various basic themes have been defined within these two product lines that provide a long-term foundation for market development activities using the full range of marketing tools.

The basic themes encapsulate the core of the brand and help to shape ongoing strategic marketing. Accessibility and sustainability, both important issues with relevance for the future, are fundamental elements of the Destination Germany brand. They span all product lines and are driven by the GNTB's innovations management team.

Berlin and the Magic Cities account for **45 per cent** of Germany's **inbound tourism**

800 years of the Kreuzchor boys' choir
Known the world over – at home in Dresden

16 PR events
207 journalists
Reach of
24.5 million

Dresden's Kreuzchor boys' choir, a venerated institution and part of Germany's musical heritage, celebrated its 800th anniversary in 2016. In time for these milestone celebrations, Germany's new Nationwide Inventory of Intangible Cultural Heritage was expanded to include traditions, knowledge and practices for the first time. The boys' choirs in Saxony have been included in the first 27 traditions to be recognised: St. Thomas choir from Leipzig, the Kreuzchor boys' choir from Dresden and the Boys' Choir of Dresden Cathedral.

The GNTB used the anniversary to promote this particular aspect of Destination Germany through global PR activities.

City breaks and cultural tourism

In 2016, Germany consolidated its position as the number one cultural travel destination for Europeans and its status as the top destination for city breaks.

21.87 million overnight stays were recorded across the ten Magic Cities, and 14.2 million in the capital Berlin. Seven of the eleven biggest city destinations in Germany grew faster than the market as a whole. The Historic Highlights of Germany contributed a further 3.7 million overnight stays to the inbound tourism figures.

The GNTB supported the city breaks trend in 2016 by promoting products to specific target markets.



New 'Learning German' section of the website

The GNTB made its first foray into this product segment last year by adding new content to its website. As well as providing information on learning German, the content is also designed to give insight into German culture, cities and regions. Testimonials, a quiz and an explanatory film inspire and educate users in German, English, French, Spanish and Italian. www.germany.travel/learn-german

Updated content in the 'Food & drink' section

Previously incorporated under the 'Gemütlichkeit' section of the website, this content has now been reworked, updated and restructured. New subsections provide information on German wines, fine dining and traditional German cuisine. www.germany.travel/food-drink

THE BASIC THEMES

in the city breaks and cultural tourism product line

- Cities and events
- UNESCO
- Museums
- Palaces, parks & gardens
- Music & shows
- Shopping
- Food & drink

Sven Torsten Prah, Senior Sales Manager International
Stage Entertainment Marketing & Sales GmbH

Our long-running hit *The Lion King* drew record crowds to Hamburg yet again in 2016, including many Scandinavian visitors, in particular from Denmark. In Stuttgart, our *Mary Poppins* production dazzled audiences, attracting an especially high number of Swiss visitors. And in Oberhausen, *Tarzan* got off to a sensational start, with a high proportion of Dutch people in the auditorium thanks to the city's proximity to the border and a well-known Dutch actress in the leading role of Jane.



The world-famous *Bodyguard* – featuring Whitney Houston's hits in English – is expected to fare well with international audiences when it comes to Stuttgart next season. The number one choice among international tourists in Berlin is still the *Blue Man Group*, the bilingual show that launched in the capital in 2004. And the German premiere of *Kinky Boots* on Hamburg's Reeperbahn is bound to appeal to many international visitors thanks to its big city flair, its Broadway success and its score by Cyndi Lauper.

Health & fitness holidays

International visitors particularly appreciate the beautiful scenery and nature that can be found in Germany.

Between 2007 and 2016, the number of **overnight stays by foreign visitors in rural areas** rose by **29 per cent.**

Family, leisure and nature holidays, as well as trips to see relatives, are especially popular types of holiday in rural regions.

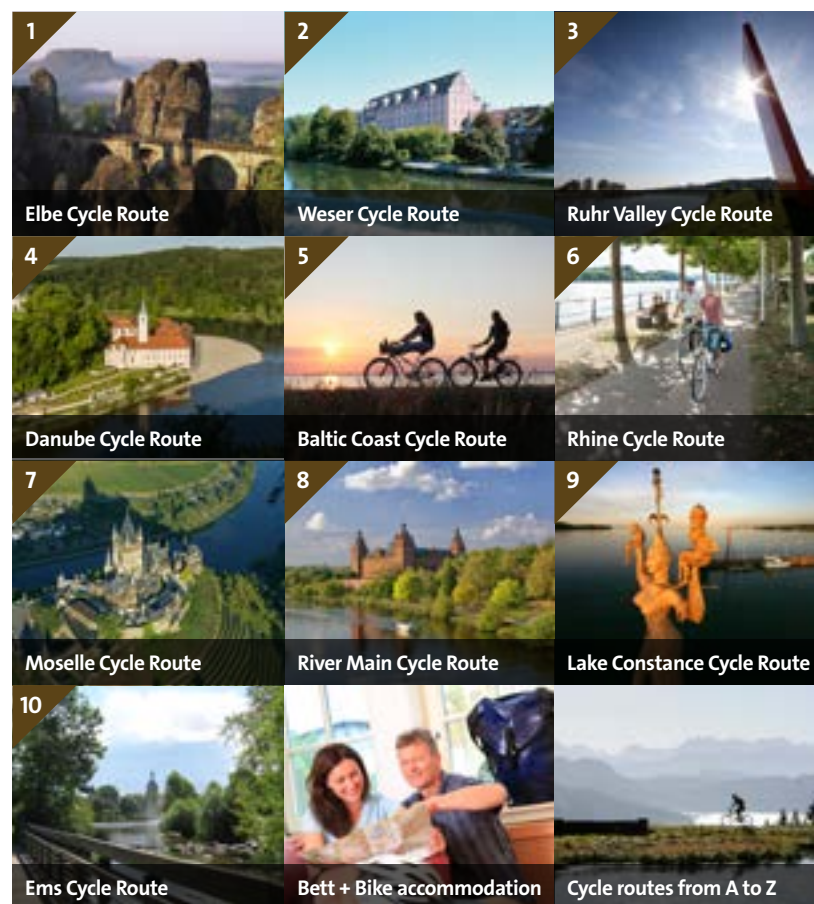
Holiday regions outside the cities are particularly popular with Germany's neighbouring countries: 31 per cent of overnight stays in towns and villages with fewer than 10,000 residents are made by visitors from the Netherlands. Demand is also strong from Switzerland, Belgium, Denmark, Austria, France and Poland.

BASIC THEMES for the 'Health & fitness holidays' product line include

- Natural landscapes
- Health/wellness/medical travel
- Walking/cycling
- Spiritual travel
- Scenic routes
- Germany's islands

Multimedia cycling campaign for 2016

In 2016, the GNTB ran a multimedia campaign in ten source markets that put the focus on cycling. As well as sending one-off newsletters to end customers, the GNTB advertised the theme using animated online banners that linked to the specially created landing page. It also posted on its Facebook pages about the 'Top ten long-distance cycle routes in Germany'. www.germany.travel/cycling



In 2016, the **cycling content registered 881,381 page impressions** (up by **134%** on 2015)

568,774 users (up by **180%** on 2015)

Innovations management: the GNTB's commitment to sustainability

In an environment shaped by the pressures of increasing travel, climate and demographic change and growing competition between destinations, sustainability is becoming a key locational factor and marketing focus. The GNTB's innovations management team systematically analyses trends, develops specific products and integrates them into the core brand of Destination Germany across all product lines.

Together with its partners in the German travel industry, the GNTB is working on the development of sustainable products and services. Germany has set a high standard in many fields, which the GNTB showcases on the international stage, providing a further boost to the country's positive image.

To effectively coordinate all the activities designed to position Germany as a sustainable tourism destination, the GNTB has developed a three-pillar strategy.



Product development and support

Sustainability is a key factor in Destination Germany's brand profile, so long as products are attractive and bookable. The GNTB uses its expertise and its network to help partners develop products and services that combine commercial efficiency with a very small environmental footprint and a high degree of social responsibility.

The GNTB hosts its own workshops together with partners from Germany's travel industry and is actively involved in the project advisory committee of the Federal Ministry for Economic Affairs and Energy (BMWi), for instance. The project 'The Destination as the stage: how does cultural tourism bring success to rural areas?' is currently under way.

Nationwide competition of sustainable tourist destinations

Applications for this relaunched national competition, for which the GNTB was an advisory partner, opened in

November 2016. The entries are judged according to criteria based on the 'Practical guidelines for sustainability in the German travel industry', a publication for which the GNTB was also on the

advisory board. As part of the prize, the finalists and the winners of special awards are given support by the GNTB in their international marketing.



German Tourism Awards

Innovation, quality, customer focus, efficiency and sustainability are the criteria by which the 60 or so candidates are selected for the annual German Tourism Award. The judging panel is made up of 19 industry experts and media representatives, together with the GNTB as the specialists in sustainability.



Lower Saxony, beach on the East Frisian island of Spiekeroog



Lower Saxony, Harz National Park treetop trail near Bad Harzburg

Deutsche Bahn's Tourism for All award

Following on from the fantastic reception of its first Tourism for All awards in 2014, Deutsche Bahn presented the accolade for the second time in 2016. The award is designed to promote barrier-free products and services within the German tourism industry. The GNTB was on the panel of judges that chose the winners.



Internal sustainability initiative

The GNTB leads by example in its marketing of Germany as a sustainable travel destination.

- Certified by the Green Globe scheme for the third year running. To maintain its certification, the organisation has to provide evidence of an improvement in performance on the previous year.
- GNTB headquarters named as an ECOPROFIT office. ECOPROFIT (ECOLOGICAL PROject For Integrated environmental Technology) is a cooperation between local authorities and local organisations.



International communications

Destination Germany is very well positioned in the international market when it comes to sustainability. The GNTB presents sustainability as a core value of the Destination Germany brand and actively integrates these strengths into its international marketing.

Showcasing Germany at the Paralympic Games from German House in Rio de Janeiro

The project kicked off with an opening event on 30 September 2015, but the highlight in 2016 was the event at the German House in Rio de Janeiro that was co-hosted by the GNTB and the German-Brazilian Chamber of Industry and Commerce on 15 September during the Paralympic Games.

GNTB as a gold sponsor of the UNWTO's International Year of Sustainable Tourism for Development 2017

The International Year of Sustainable Tourism for Development is being coordinated by the World Tourism Organization (UNWTO) on behalf of the UN General Assembly. As a UNWTO gold sponsor, the GNTB takes part in international events to present Germany's exemplary sustainable tourism credentials.



Green Destinations

In 2016, the Green Destinations initiative updated its list of the top 100 holiday destinations in the world to include Germany's Bliesgau Biosphere Reserve and Uckermark region, as well as the East Frisian islands of Norderney and Juist. At the Global Green Destination Days in Ljubljana, the GNTB gave a presentation and held a panel discussion on Germany's wide range of sustainable tourism offerings.



Global Sustainable Tourism Council (GSTC)

At the GSTC European Regional Meeting in Athens, the GNTB took the opportunity to present sustainable tourism in Germany.

New 'Sustainable travel in Germany' microsite

The microsite, which is available in 17 languages, gives concise information on sustainable travel throughout the tourism supply chain. An interactive map of Germany helps users find accommodation that is certified as sustainable – from simple eco-campsites to luxury hotels. The certified establishments were selected by experts from EcoTrans, working in partnership with the regional marketing organisations.

- Member of the Energy Efficiency Network
- The Germany Travel Mart™ (GTM), the most important sales event for Germany's inbound tourism industry, has been run as a green meeting since 2013. The GNTB has been awarded the Green Note quality seal for the planning and organisation of the 2017 GTM.



Accessibility: making travel to and within Germany convenient for all

BMW project Travel for All

The Federal Ministry for Economic Affairs and Energy (BMWi) is promoting the expansion of accessible tourism through its Travel for All project. People with temporarily or permanently restricted mobility or other impairments should also be able to experience the many facets of Germany. The initiative also makes life easier for pregnant women and families with children in

pushchairs. Older travellers, part of an ever-growing demographic, also benefit greatly from the improved comfort, convenience and customer focus offered by accessible services.

The main goal of the project is to introduce a nationally recognised signage system for tourist attractions and services. To achieve this, companies and organisations representing all stages

of the tourism service chain are being documented, evaluated and accredited in accordance with standardised criteria. A key part of the project is a training programme for tourism service providers. The GNTB is actively involved in the project as a specialist advisor. It is also using its global network to present the results of the project as examples of best practice at international industry events.

Pre-convention tours at the 2017 GTM

The wide range of pre-convention tours for the international delegates at the GTM included a special itinerary focused on sustainability and accessibility.



Pre-convention tour for the 2017 GTM: Barrier-free Travel, Allgäu ART Hotel

GNTB workshop for travel experts from South Korea

In talks held at the offices of DB Vertrieb GmbH in Frankfurt, representatives from Germany's travel industry, led by the GNTB, gave a delegation of high-ranking tourism professionals from South Korea some insight into developments in barrier-free tourism. The 17 participants included senior executives from Korean disability associations and organisations, tourism experts and academics. Alongside the GNTB, the German contingent included senior executives from our strategic partner the National Coordination Board Tourism for All (NatKo) and representatives from Deutsche Bahn.

Barrier-free Tourism Day at the 2017 ITB

Since 2014 the GNTB has been responsible for organising this prominent trade event on behalf of the German parliament. The event is supported by the Association of Barrier-free Destinations in Germany, the Tourism for All working group of the German federal states and Messe Berlin. Barrier-free Tourism Day, held on the Friday of the ITB, is now a firm fixture on the accessible tourism calendar for political delegates, international travel professionals, journalists, and representatives of regional and municipal marketing organisations, cultural institutions and trade associations. Industry experts see it as a platform for exchanging ideas, discussing new approaches to accessibility and showcasing to the media the progress that has been made.

The keynote speaker was Antti Peltomäki, Deputy Director General of the Directorate-General for Internal Market and Entrepreneurship at the European Commission.

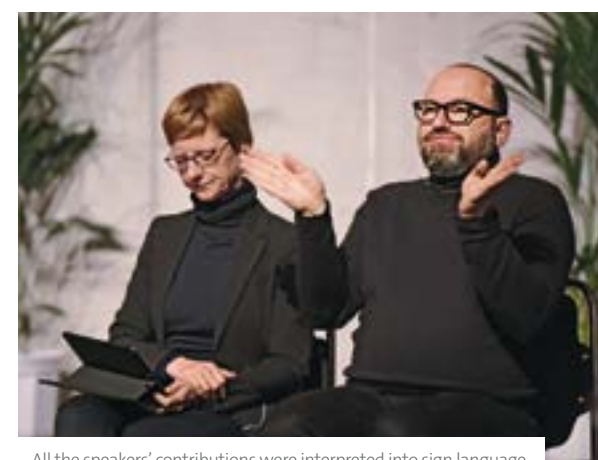
The presentations and mp3 recordings are available to download from www.germany.travel/barrierfreetravel.



Iris Glicke, MdB, Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy, Federal Government Commissioner for SMEs and Tourism and the New Federal States, speaking on Barrier-free Tourism Day at the 2017 ITB



Leading representatives from the global travel industry were joined by well-known experts for panel discussions and presentations on the key theme of 'Product design and targeted communications'. Speakers pictured (left to right): Martin Heng, Accessible Travel Manager & Editorial Advisor of Lonely Planet, Ross Calladine, Head of Business Support at VisitEngland, Gerda van't Land, Managing Director of Buitengewoon Reizen (NL), Volker Langguth-Wasem, Chairman of Bundesarbeitsgemeinschaft SELBSTHILFE, Kornelia Grundmann, Managing Director of gabana Agency for Accessibility. Other speakers (not pictured): Ellen Engel-Kuhn, Head of the Disability Liaison Office at DB Vertrieb GmbH, Claus Quasten, Hotel Director of Allgäuer Integrationsbetrieb -Hotel- gGmbH, and Rolf Schrader, Managing Director of the German Seminar for Tourism (DSFT).



All the speakers' contributions were interpreted into sign language.



Campaign progress report:

Luther 2017

500 years since the Reformation in Germany



As the place where the Reformation began, Germany was at the heart of the cultural and historical upheavals witnessed during the Reformation era. The GNTB campaign to promote the 500th anniversary of the Reformation is primarily a digital campaign. It centres around Martin Luther as a symbolic figure and showcases Destination Germany to travellers with an interest in culture and religion, including some of the world's 400 million Protestants.

Long-term approach with strong partners

Themes in the Luther decade since 2008

- Theme for 2012 'Reformation and Music' – the GNTB promotes the 800th anniversary of the St Thomas choir to key source markets (global reach of 82 million through PR events and press activity)
- Focal point for 2015 'Image and Bible' – the GNTB highlights the 500th anniversary of the birth of Lucas Cranach the Younger through a wide range of activities (more than 140 press publications – print, online, TV and radio in the anniversary year)

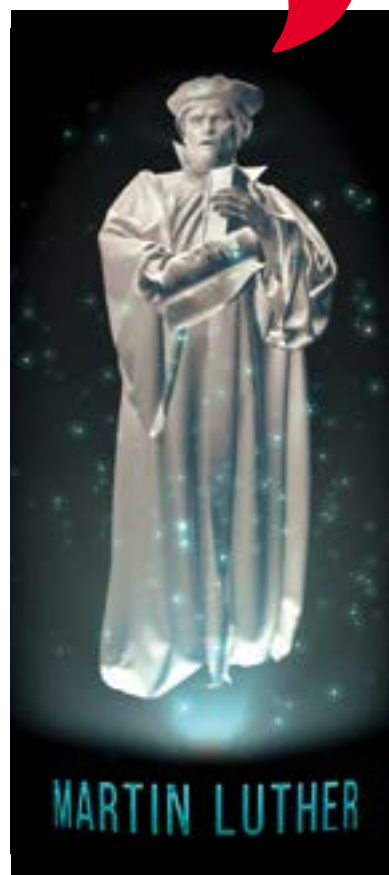
Working with our partners

- 'Luther 2017' coordinating office
- Evangelical Church in Germany
- Tourism organisations of the federal states
- German towns with historical links to Luther

Key markets with strong connections to the Reformation

The Netherlands, Switzerland, Scandinavia, Hungary, USA, Canada and South Korea

#LutherCountry



Three-dimensional Luther hologram at the GNTB's Washington launch event for the Luther campaign.

Selected activities: USA

At the main celebration for the Day of German National Unity at the ambassador's residence in the USA, the GNTB, in its capacity as official partner to the Federal Foreign Office, presented a detailed digital hologram of Luther in collaboration with Germany Trade & Invest (GTAI). Other highlights in the USA included PR events for the opening of the 'Here I stand...' exhibitions in New York, Atlanta and Minneapolis.



Multimedia activities promoting the key Martin Luther themes

The Reformation theme has featured prominently on the GNTB's website www.germany.travel throughout the Luther decade.

- Extensive content on tourist attractions and events marking the Reformation anniversary
- Animated film showing facts and figures
- Interactive map featuring towns and sites with Luther connections, including Wittenberg, Eisleben and Mansfeld (which all bear the Lutherstadt designation), Torgau, Schmalkalden, Wartburg Castle in Eisenach, Erfurt, Augsburg, Coburg, Worms and Heidelberg
- Seven 360° videos that showcase selected locations from Luther's life as historical sites and tourism destinations
- Eight Luther-themed routes featuring sites of importance in Luther's life
- Press kits containing information and photographs in the online press centre

+ Cross-media activities with Röbi Koller

In Switzerland, the GNTB launched a whole series of related cross-media activities in partnership with the well-known TV host and journalist Röbi Koller, who visited various Luther sites in Germany in 2015. This trip led to a report, a film and a road-show through Swiss towns and cities.

The campaign has an eye-catching mascot in the shape of a Luther figure by Playmobil, which was devised in collaboration with the Nuremberg Convention and Tourist Office. The figure is used as a give-away and has also been integrated into numerous other marketing activities spanning various media.

Journalists from traditional media are being taken on press highlight tours, while bloggers and other influencers are being invited to visit unusual places along the Luther routes and to share their experiences on Facebook, Instagram, YouTube, Snapchat and other social media. The hashtag #luthercountry connects all social media activity.

3 TV commercials
in Switzerland –
66 broadcasts –
9.8 million viewer contacts

Facebook and Twitter
reach of **3.9 million**

(31 Oct 2016 – 31 May 2017)

Native advertising campaign
(16 Jan – 8 Feb 2017)
featuring text and images:
1.7 million ad impressions

Provisional performance analysis 31 Oct 2016 – 31 May 2017

www.germany.travel/luther

approx. **200,000**
visitors

300,000
page impressions

360° videos with
2.5 million views

Looking ahead

Theme-based marketing in 2017

documenta14

The documenta, one of the foremost exhibitions of modern and contemporary art, will be taking place for the 14th time in 2017. Adopting the theme 'Learning from Athens', documenta14 is being held in two locations: in the Greek capital from 8 April to 16 July and in its traditional location of Kassel from 10 June to 17 September.

The GNTB is making this celebration of contemporary art a key theme in its marketing of Germany as a cultural destination. The exhibition is being promoted in relevant markets through a range of online and offline marketing and PR activities.



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

IGA Berlin 2017

The International Garden Show (IGA), held every ten years, is a festival and horticultural show rolled into one. In 2017, Germany's largest garden event will take place in Berlin for the first time. The show runs for 186 days, and by the time it closes on 15 October 2017, Berlin expects to have welcomed around two million visitors from Germany and the rest of Europe.

The GNTB is making the IGA Berlin 2017 a focal point in its worldwide marketing activities, thereby highlighting the aspects of sustainability and nature in the context of urban areas.



Theme-based campaign for 2018

Culinary Germany

According to the Quality Monitor survey of the German tourism industry, 40 per cent of international guests like to 'experience typical regional cuisine' while on holiday in Germany. The restaurant and café sector contributes at least 3.2 million overnight stays to Germany's inbound tourism.

This is the basis on which the GNTB is developing the 'Culinary Germany' campaign. At its heart lie offerings that are typical of each region. These enable visitors to experience culinary traditions in a very authentic way, exploring Destination Germany while enjoying great food and drink.

A film project, being run in close cooperation with the 16 regional marketing organisations, presents typical culinary specialities from each region using authentic stories. This adds to the multimedia presentation of the theme in the GNTB's online and offline activities. In the international source markets, the GNTB is also running culinary events with food trucks, which are promoted in the media at kick-off events. Through close collaboration with Premium Partner the German Wine Institute, the GNTB is raising the profile of the year's campaign in international source markets.



Monika Reule,
Managing Director,
German Wine Institute

The countryside where Germany's wine is produced is simply charming – steep slopes, gently rolling hills, picturesque river scenery, sleepy wine-growing villages. Ger-

many's 13 wine regions are hugely popular with day trippers and holidaymakers from all over the world, and beautifully combine nature, wine and culture. There's something for every taste in Germany's wine regions, whether you explore on foot, by bike, by car or even motorhome – whether you're on a multi-day tour, following a circular trail or making a special visit to a cultural attraction or viewpoint. Along the way, there are plenty of wine grower's taverns, modern wine shops or traditional vineyard restaurants that make inviting places to stop awhile.



OTHER THEME-BASED CAMPAIGNS AT A GLANCE

2019:

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

2020:

- 250th anniversary of the birth of Beethoven
- Oberammergau Passion Plays

Background

Challenges and opportunities for inbound tourism to Germany



Reinhard Meyer,
President of the German
Tourism Association (DTV)

We live in uncertain times, with the threat of terror attacks being felt in many countries around the world. So, does this mean people now only travel to Finland or Liechtenstein, where they might feel particularly safe? Not at all. It is also fair to say that other aspects besides security play an important role when



choosing a destination. These include being easy to get to, having a good infrastructure, and having a wide range of quality offerings to choose from. These are the strengths with which Germany has established itself as a strong brand on the international market. The United Nations have declared 2017 the International Year of Sustainable Tourism for Development. Sustainability is not an end in itself: few other sectors are as dependent on natural and cultural resources, and the support of the local population, as tourism. The 2016/2017 nationwide competition for Sustainable Tourism Destinations, organised by the German Tourism Association, the Federal Environment Ministry and the German Federal Agency for Nature Conservation, is another initiative to strengthen Germany's competitiveness.

It is mainly the major cities that are benefiting from growth in inbound tourism. There are many challenges to overcome for service providers, tourism organisations at all levels, and partners in the travel industry – as well as policymakers and local authorities – in order to take full advantage of the growth potential in rural areas.

Climate change in the low-lying mountain regions also constitutes a huge challenge for rural tourism, as the resultant increase in extreme weather drives up maintenance costs. For example, the regional foot-path networks urgently need to be made weather-proof and climate-proof. This also means raising awareness among the relevant local partners and ensuring they have the necessary training.



Norbert Fiebig, President of
the German Travel Association.



North Rhine-Westphalia, UNESCO World Heritage Zollverein Coal Mine Industrial Complex



Klaus Henschel, Managing Director
of Lufthansa City Center International
GmbH

For the travel industry, 2016 has been a rollercoaster ride of positive trends

and uncertainty. Travel patterns have been shaped by a year of terror attacks, widespread political instability, Brexit and a polarising presidential campaign in the USA. Though former holiday favourites such as Turkey have been hit hard, and the Egypt business remained weak, Lufthansa City Center has made the most of other destinations and the continually growing cruise sector. At the same time, the increased demand for tailored advice on travel products has created new sales opportunities for travel agents. The growing use of digi-

tal technologies, however, continues to pose a challenge to tourism providers in 2016 and beyond.

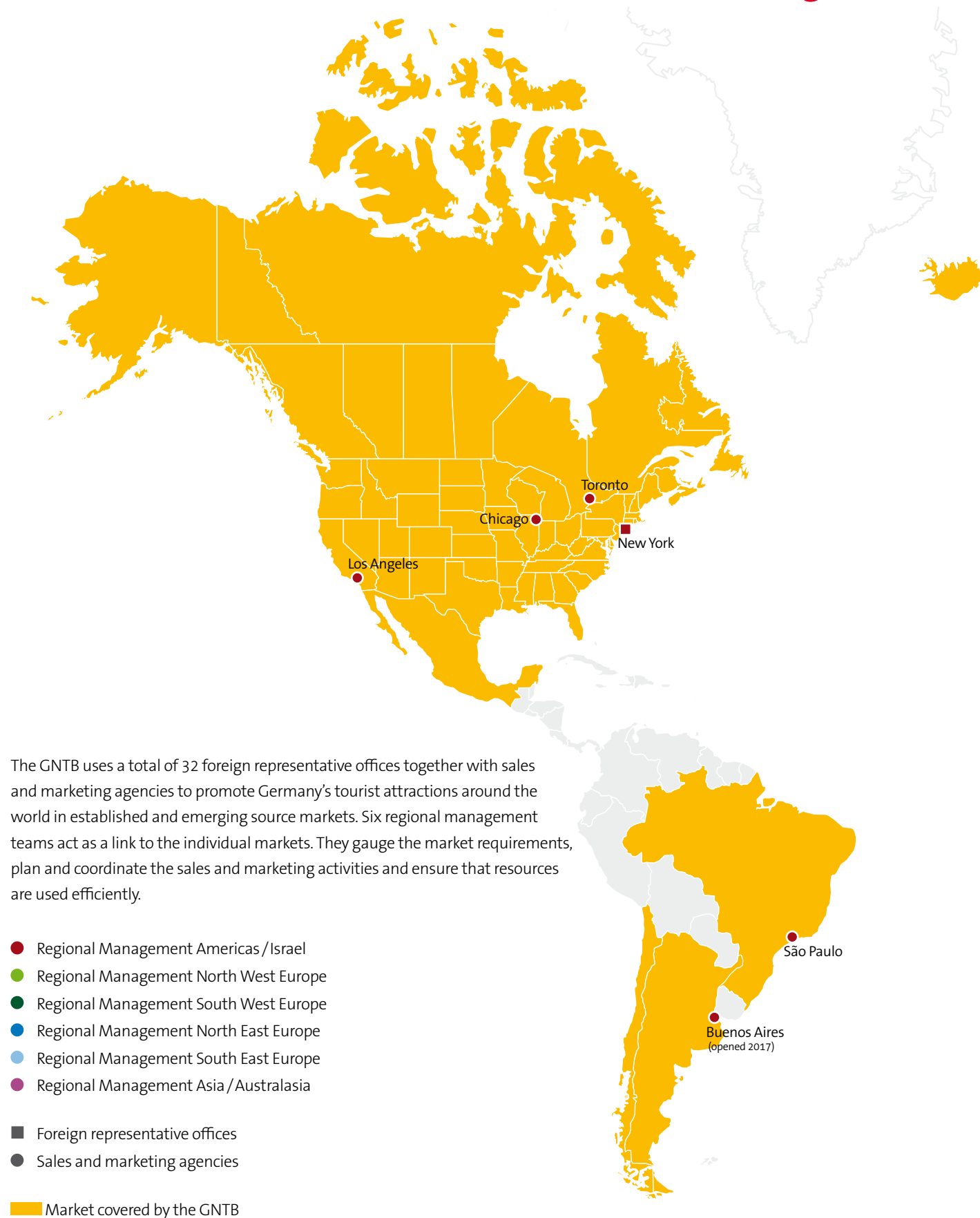
2017 presents numerous risks to international tourism to Germany. The country has dropped even further in a global ranking of safety in international destinations. This could potentially mean a fall in visitor numbers, especially from Asia and the USA. Nevertheless, the current Martin Luther theme is attracting many visitors from all over the world to Germany's Reformation sites.

International marketing

Local presence for global impact



Global network for sales and marketing



* promoting Germany in Bosnia and Herzegovina, Bulgaria, Croatia, Montenegro, Romania and Serbia.

New GNTB representative offices in **Singapore** and **Buenos Aires**.



GERMANY IS THE NO. 1 TRAVEL DESTINATION

for Denmark, the Netherlands, Poland, Switzerland, the Czech Republic and the Balkans (Europe¹) and for China and the Arab Gulf States (overseas²).

¹ Source: IPK International, all outbound trips made worldwide by Europeans in 2016.

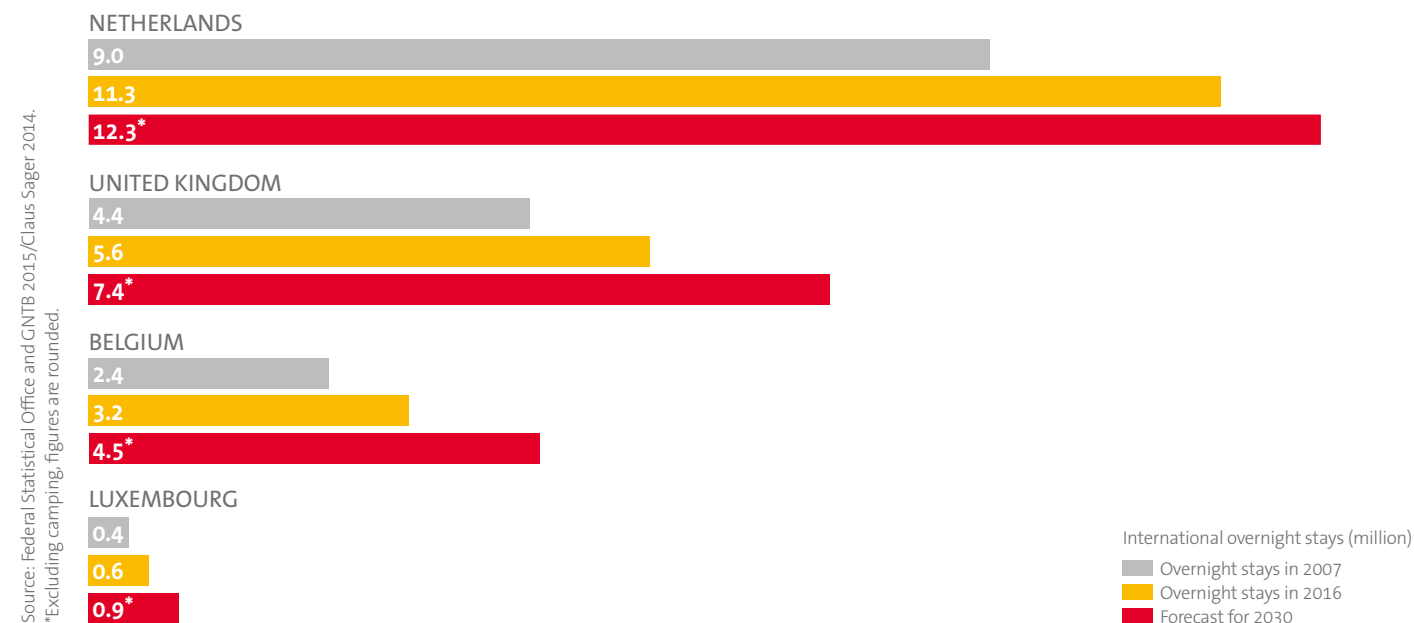
² Source: IPK International, all trips to Europe from overseas in 2015.

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 2016. With more than 21 million overnight stays, they generated around a quarter of all inbound tourism.



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



Netherlands

11.3 million overnight stays represent a market share of 13.9 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, albeit gradually.

Over three quarters of all Dutch visitors to Germany are holidaymakers. Their preferences are for city breaks and events (36 per cent), holiday regions (35 per cent) and multi-destination tours (13 per cent). Over 55s make up more than half of Dutch visitors to Germany.

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

Germany was the **no. 1** outbound destination for Dutch travellers with **4.6 million trips** in 2016

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

Population: 17 million
Per capita GDP: €40,494; biggest segment for travel to Germany: holidays (77%)

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.



Mecklenburg-Western Pomerania, chalk cliffs on Rügen island

Belgium / Luxembourg

With a market share of 3.9 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 4.7 per cent of all international overnight stays in Germany.

Three quarters of Belgians who travel to Germany come for a holiday; city breaks and events take a market share of 57 per cent, while nearly a quarter of visitors relax in the holiday regions. More than 50 per cent go on short breaks.

Belgian holidaymakers particularly like Germany for its landscape and scenery and for its atmosphere and ambience.

Key topics in the GNTB's marketing in Belgium and Luxembourg are culture and history, nature and active pursuits, and the future-focused themes of sustainability, barrier-free travel and holidays in the countryside.

Germany was the **second** most popular outbound destination for Belgian travellers with **2.2 million trips** in 2016

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

Population: 11.4 million
Per capita GDP: €37,163; biggest segment for travel to Germany: holidays (75%)

UK / Ireland

With a market share of 6.9 per cent, the United Kingdom is the third largest European source market for Germany, behind the Netherlands and Switzerland. Following years of continual growth since the financial crisis of 2008 / 2009, its volume of overnight stays rose only slightly in 2016. The Brexit vote could lead to a medium-term downturn from this market.

Ireland contributed 476,000 overnight stays in 2016, a year-on-year increase of 9.3 per cent that surpassed the average for the region as a whole.

City breaks and events are particularly popular with British visitors to Germany, accounting for 58 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.

Germany was the **sixth** most popular outbound destination for UK travellers with **3.1 million trips** in 2016

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

Population: 64.4 million
Per capita GDP: €35,345; biggest segment for travel to Germany: holidays (60%)

Top destinations in Germany / federal states

	1st	2nd	3rd
NETHERLANDS	Rhineland-Palatinate 24.4%*	North Rhine-Westphalia 22.3%*	Bavaria 13.4%*
UK	Berlin 30.0%*	Bavaria 18.3%*	North Rhine-Westphalia 14.0%*
BELGIUM	Rhineland-Palatinate 29.9%*	North Rhine-Westphalia 21.8%*	Baden-Württemberg 13.2%*
LUXEMBOURG	Baden-Württemberg 27.3%*	Bavaria 14.9%*	Rhineland-Palatinate 14.0%*

2016 statistics / Federal state's share of all overnight stays from the market concerned.
Source: Federal Statistical Office

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.

- Foreign representative office for North East Europe
- Sales and marketing agencies
- Regional Management North East Europe

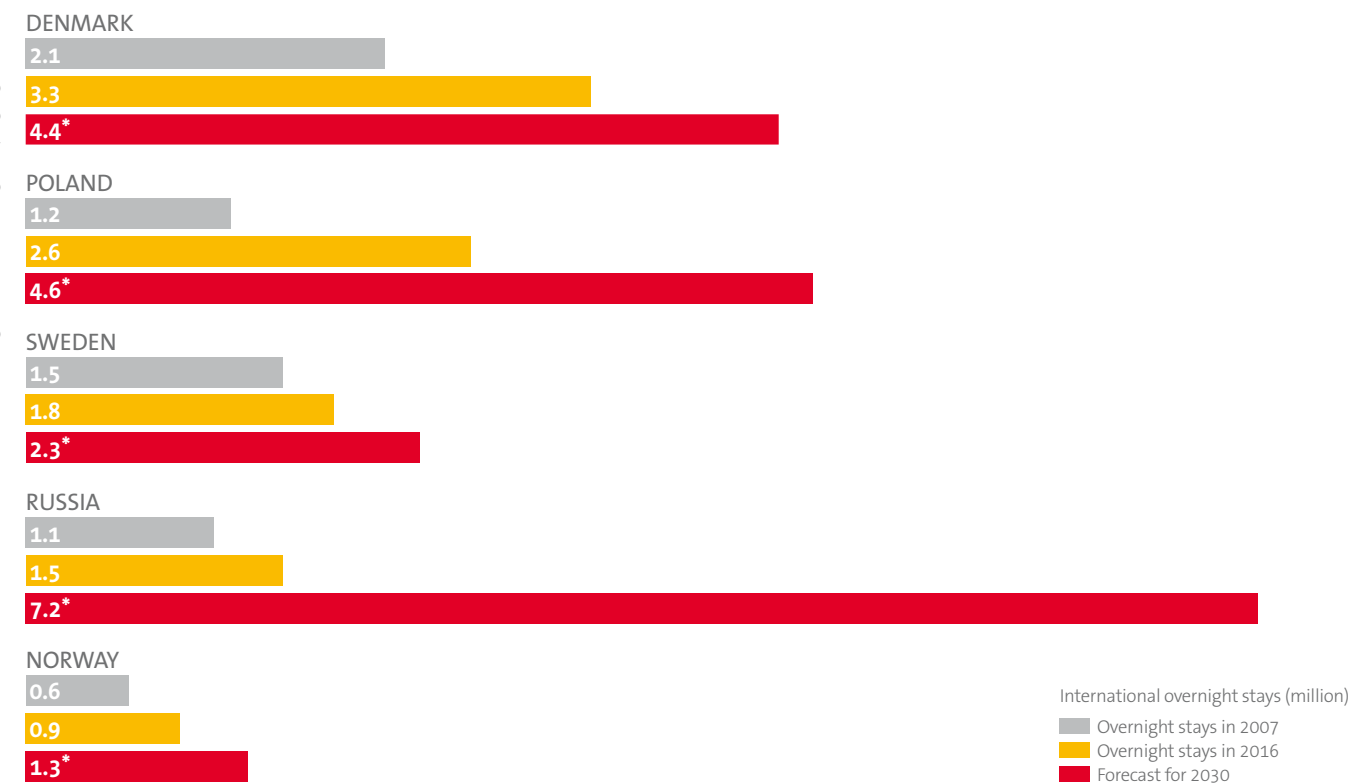


Regional Management North East Europe

The Regional Management North East Europe territory covers markets that are at very different stages of development. As a result, the volume of outbound travel to Germany differs greatly between the individual countries. Poland is the growth driver, registering a 5.4 per cent increase in overnight stays last year. After years of expansion between 2008 and 2013, the Russian market fell sharply again in 2016. The Scandinavian countries and Baltic States are growing at a slower rate than the rest of Europe or are declining slightly.

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

Source: Federal Statistical Office and GNTB 2015; Claus Sager 2014. * Excluding camping, figures are rounded.



Denmark

Denmark maintained its position in the top ten inbound markets for Germany, taking a market share of 4.1 per cent and growing at a rate just short of the average. Over the past ten years, the market has grown by an average of 5.5 per cent, outperforming the level for Europe as a whole.

Holidays accounted for almost 70 per cent of trips to Germany made by Danes – their favourite destinations were the North Sea and Baltic coasts. Also very popular were city breaks and events. Danish travellers particularly like Germany for its atmosphere and ambience, its public transport and its barrier-free amenities.

Germany was the **no. 1** outbound destination for Danish travellers with **3.0 million trips** in 2016

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

Population: 5.6 million
Per capita GDP: €47,300; biggest segment for travel to Germany: holidays (67%)

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

Every year since 2007, the volume of overnight stays by Polish travellers has grown by an average of 9.0 per cent. This makes Poland one of the most buoyant European source markets: in 2016, Germany's eastern neighbour firmly established itself among the top ten countries for inbound tourism to Germany.

The average age of Polish holidaymakers in Germany is 40.3.

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, Germany for young people and theme parks are also being promoted.

Among Polish tourists, Germany scores particularly highly as a travel destination for its quality and choice, its townscapes and architecture and its barrier-free amenities.

Germany was the **no. 1** outbound destination for Polish travellers with **7.6 million trips** in 2016

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

Population: 38.5 million
Per capita GDP: €11,248; biggest segment for travel to Germany: holidays (38%)

Sweden

The volume of overnight stays by visitors from Sweden held steady in 2016. The country is currently the 14th largest source market for Germany.

Holidaymakers account for 67 per cent of Swedish travellers in Germany, with 56 per cent of them coming to visit cities or events. Berlin is by far the most in-demand city destination, followed by Hamburg and Munich. Also popular are the Baltic coastlines of Schleswig-Holstein and Mecklenburg-Western Pomerania, which are situated close to Sweden.

Key target demographics for the GNTB in Sweden are active seniors and families. Roughly 90 per cent of Swedes book components of their trip in advance, with 86 per cent doing so online.

Germany was the **second** most popular outbound destination for Swedish travellers with **1.6 million trips** in 2016

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

Population: 9.9 million
Per capita GDP: €47,200; biggest segment for travel to Germany: holidays (67%)

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.



Saxony, UNESCO World Heritage Prince Pückler Park, Bad Muskau

Russia

2016 saw the Russian market in decline for the third consecutive year. Thanks to its strong gains in market share between 2008 and 2013, however, Russia retained its position as the twelfth biggest European source market for Germany at the end of 2016.

Since early 2017, things have taken a turn for the better, with Russia returning to growth.

Germany was the **second** most popular outbound destination for Russian travellers with **1.5 million trips** in 2016

1st CHINA	4th ITALY
2nd GERMANY	5th KAZAKHSTAN
3rd UKRAINE	

Population: 142.4 million
Per capita GDP: US\$ 8,838; biggest segment for travel to Germany: holidays (53%)

Top destinations in Germany / federal states

	1st	2nd	3rd
DENMARK	Schleswig-Holstein 20.2%*	Berlin 19.6%*	Hamburg 11.9%*
POLAND	Bavaria 17.3%*	North Rhine-Westphalia 13.7%*	Baden-Württemberg 12.0%*
SWEDEN	Berlin 25.3%*	Schleswig-Holstein 13.0%*	Bavaria 12.5%*
RUSSIA	Bavaria 30.9%*	Berlin 19.9%*	North Rhine-Westphalia 12.6%*
NORWAY	Berlin 34.4%*	Bavaria 13.8%*	Schleswig-Holstein 8.4%*

2016 statistics: *Federal states' share of all overnight stays from the market concerned. Source: Federal Statistical Office.

Norway

Norway, which over the past two years has recorded slight falls, is currently the 20th largest source market for inbound tourism to Germany.

Of the trips made by Norwegian travellers to Germany, 44 per cent are short breaks, during which they tend to spend a lot of money (an average of €337 per day). At 26 per cent, the volume of holidaymakers travelling from Norway to Germany by sea is above the average; 53 per cent travel by air.

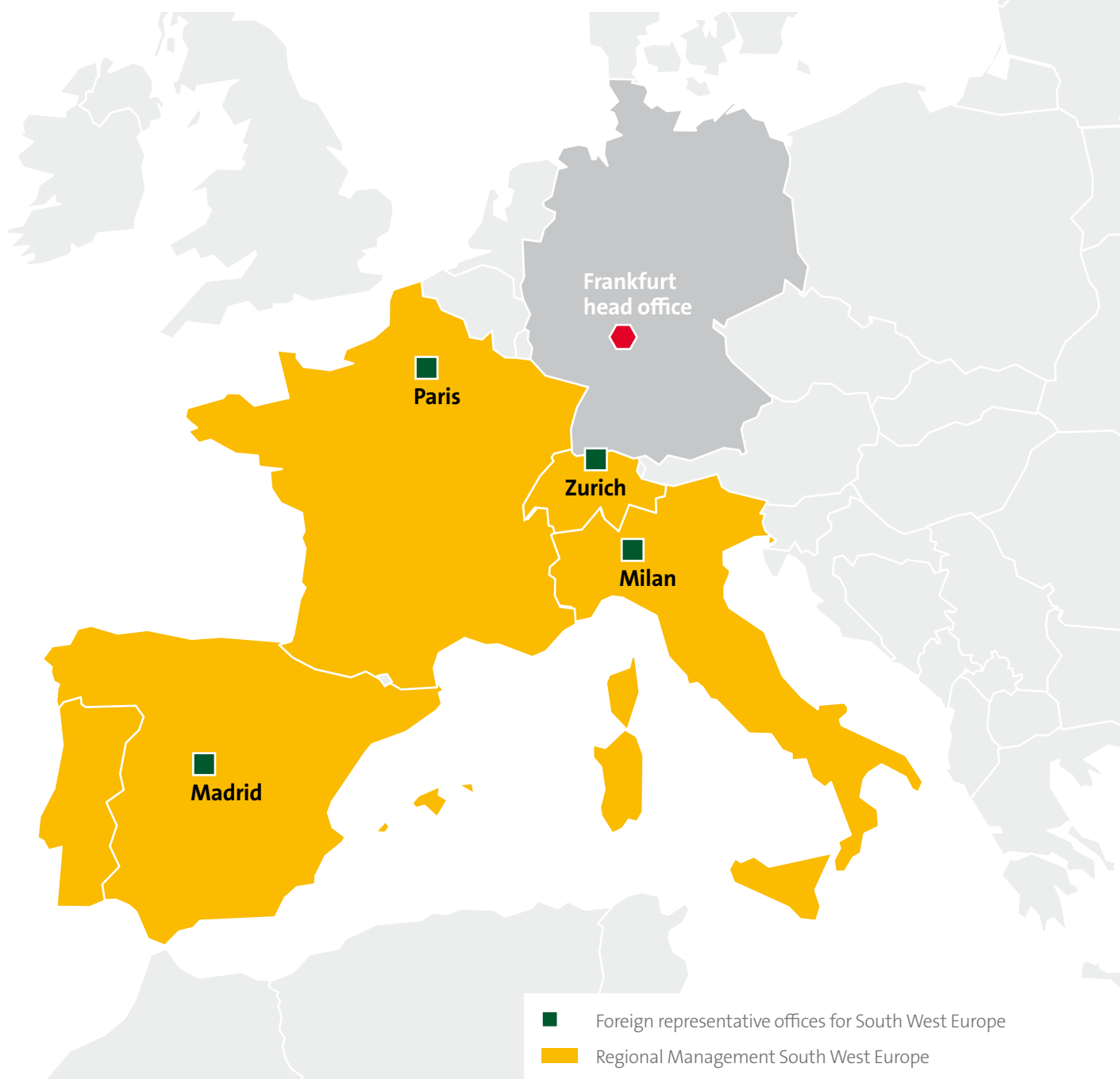
Germany was the **fifth** most popular outbound destination for Norwegian travellers with **0.6 million trips** in 2016

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

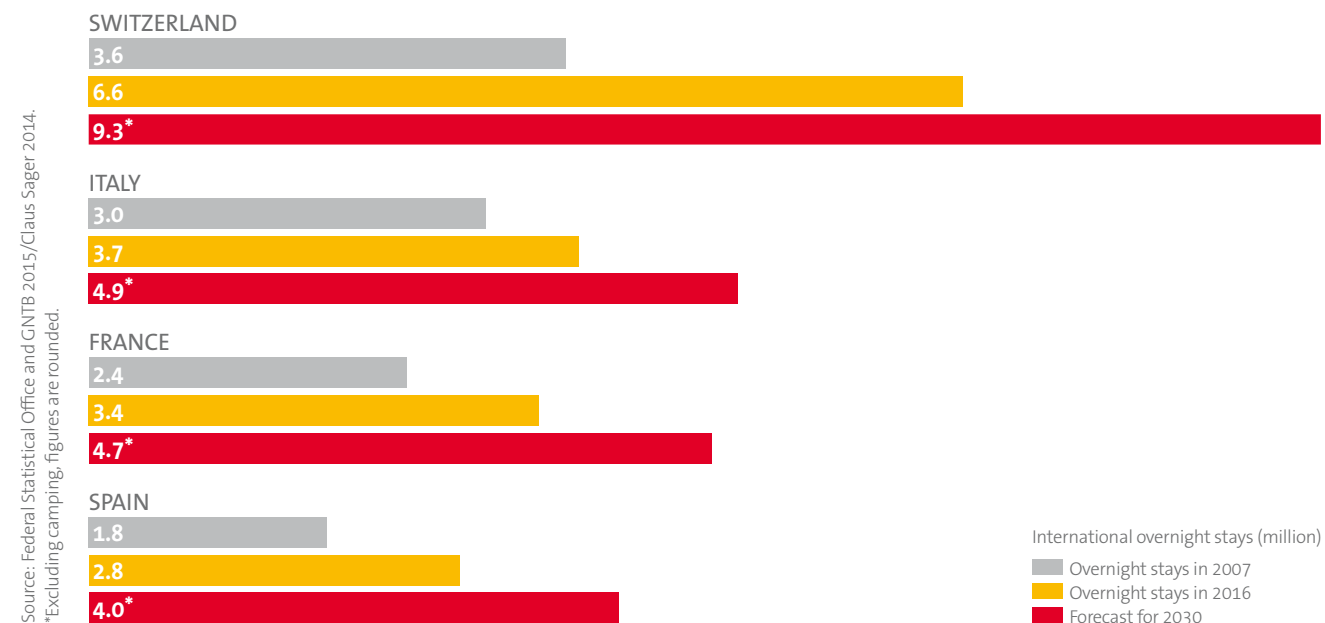
Population: 5.3 million
Per capita GDP: €66,849; biggest segment for travel to Germany: holidays (68%)

Regional Management South West Europe

The traditionally strong markets in south-west Europe generated almost 17 million overnight stays in 2016 – representing around 20 per cent of the total inbound tourism market. With the exception of Italy, all markets in this region expanded last year. Overall, the countries in the Regional Management South West Europe territory grew above the European average, at 2.7 per cent.



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



Switzerland

Switzerland contributed almost 210,000 additional overnight stays to the German tourism industry's record year in 2016. In doing so, it continued an uninterrupted ten-year period of growth and impressively consolidated its position as Destination Germany's second biggest source market.

57 per cent of all trips to Germany by Swiss visitors are holidays, of which around a fifth are spent in holiday regions. City breaks and cultural and sporting events make up the largest part of this segment, at 40 per cent.

In 2016, the GNTB in Switzerland put particular emphasis on the 500th anniversary of the Reformation. The Young Danube campaign was also promoted to the Swiss market.

Germany's restaurants, hotels and value for money scored particularly highly with Swiss visitors. And because the franc has been unpegged from the euro, Germany's prices remain attractive to people from Switzerland. This should give further momentum to tourism in the border regions and to shopping tourism.

Germany was the **no. 1** outbound destination for Swiss travellers with **6.3 million trips** in 2016

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

Population: 8.2 million
Per capita GDP: €71,735; biggest segment for travel to Germany: holidays (57%)

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.

Italy

Italy, with a market share of 4.5 per cent, is the fifth largest European source market for Destination Germany. It is the only one of the top ten markets to register a fall in 2016, showing the effects of the ongoing financial crisis, tightened border controls and a drop in outbound travel volumes caused by a general fear of terrorism. Almost two thirds of Italian visitors to Germany are holidaymakers, with over half of them going on city breaks and a third on multi-destination tours. The 'younger travellers' age group (15 to 34 year olds) accounts for 39 per cent of the market, which is higher than the average. The proportion of travel bookings that are made online is accordingly high, at 83 per cent.

Germany was the **third** most popular outbound destination for Italian travellers with **2.2 million trips** in 2016

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

Population: 62.0 million
Per capita GDP: €27,134; biggest segment for travel to Germany: holidays (65%)

France

Following a period of poor economic growth, the French market rallied in 2016 to generate a rise in the volume of overnight stays in Germany that exceeded the European average. With a market share of 4.3 per cent, France is the sixth largest European source market for Germany's inbound tourism.

More than half of French visitors to Germany come on holiday, with longer trips being the most popular choice (63 per cent). Major cities and events are in high demand (41 per cent). In the holiday regions of the non-city states, active pursuits such as cycling and walking are very much in favour.

French visitors particularly like Germany for its atmosphere and ambience, its architecture and buildings, and its townscapes.

Germany was the **third** most popular outbound destination for French travellers with **2.6 million trips** in 2016

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

Population: 66.8 million
Per capita GDP: €34,516; biggest segment for travel to Germany: holidays (60%)

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.

Spain/Portugal

After another year of above-average growth, Spain made an emphatic return to Germany's top ten source markets in 2016. Holidaymakers account for 63 per cent of Spanish visitors to Germany. Demand is buoyant for city breaks and events (60 per cent); just under a quarter of Spanish travellers opt for multi-destination tours. They are also highly likely to book travel components online (75 per cent of bookings).

The Portuguese market is covered by the GNTB in Madrid. It delivered significant growth of 4.4 per cent last year.

Germany was the **fourth** most popular outbound destination for Spanish travellers with **2.0 million trips** in 2016

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

Population: 48.6 million
Per capita GDP: €24,148; biggest segment for travel to Germany: holidays (63%)

Germany was the **fifth** most popular outbound destination for Portuguese travellers with **160,000 trips** in 2016

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

Population: 10.8 million
Per capita GDP: €17,903; biggest segment for travel to Germany: holidays (68%)

Top destinations in Germany / federal states

	1st	2nd	3rd
SWITZERLAND	Baden-Württemberg 37.5%*	Bavaria 22.7%*	Berlin 9.7%*
ITALY	Bavaria 31.3%*	Berlin 25.3%*	Baden-Württemberg 12.7%*
FRANCE	Baden-Württemberg 26.0%*	Berlin 18.9%*	Bavaria 17.3%*
SPAIN	Berlin 34.1%*	Bavaria 19.5%*	Hessen 13.0%*

2016 statistics. *Federal state's share of all overnight stays from the market concerned. Source: Federal Statistical Office.



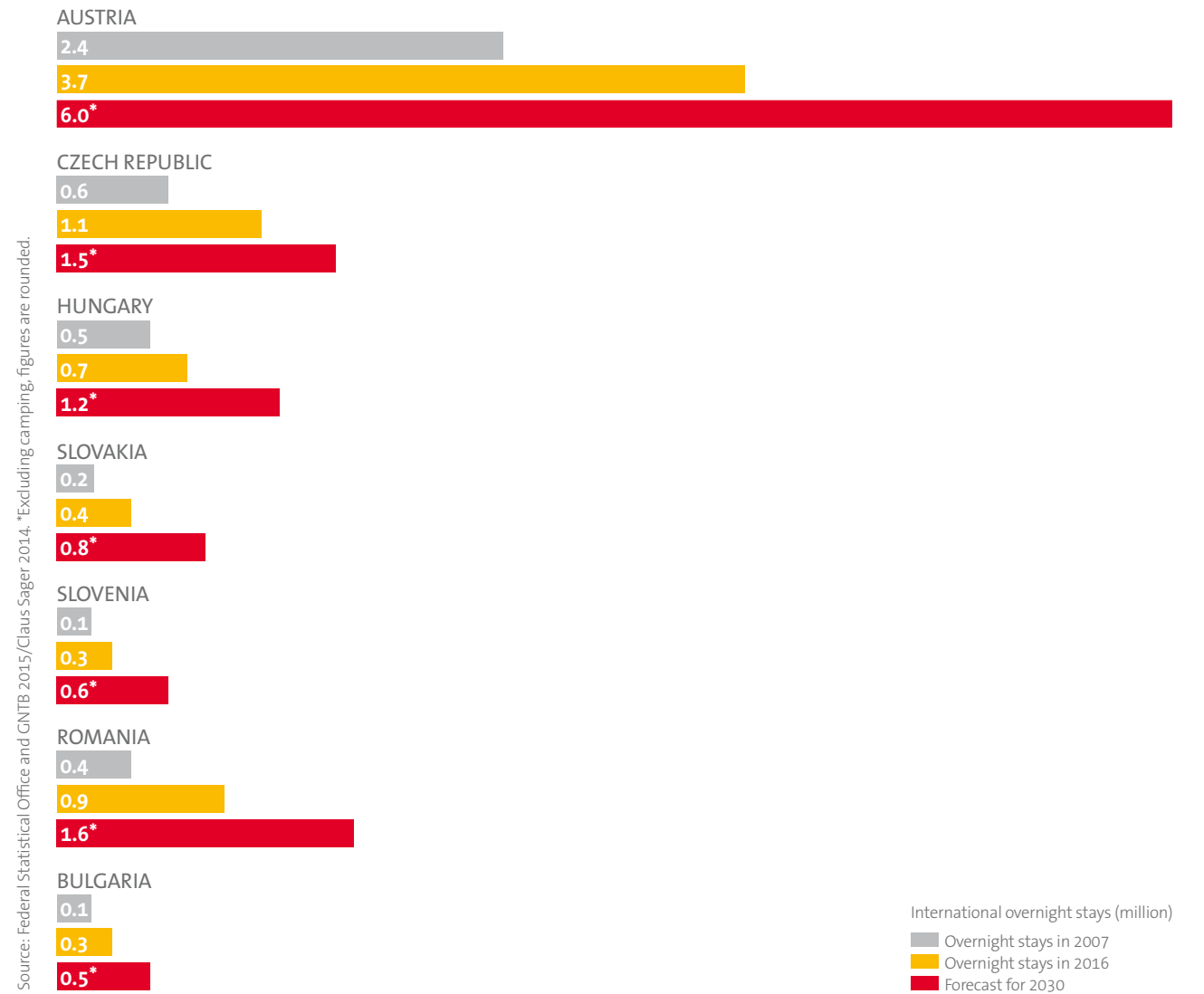
Bremen, Klimahaus® Bremerhaven 8° Ost

Regional Management South East Europe

With almost nine million overnight stays and growth of 4.8 per cent in 2016, South East Europe remains the fastest growing European source region for tourism to Germany. The rates of growth in the individual markets are volatile, however. Sharp spikes in growth are followed by short, weaker phases. Austria remains a constant in terms of international overnight stays. Particularly impressive in 2016 was the above-average growth achieved in the Balkan countries.



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



Austria

Austria, with a market share of 4.6 per cent in 2016, takes fifth place in the global ranking of all source markets for German tourism.

Holidaymakers account for 47 per cent of visitors to Germany from Austria; 28 per cent of visitors travel on business and 24 per cent visit friends or family. At 48 per cent, city breaks and travel for events are the dominant type of holiday. For Austrian visitors, the car is the most frequently used means of transport (59 per cent).

The GNTB in Austria is heavily promoting activity-based holidays (walking and cycling), as well as city breaks and cultural travel.

Germany was the **second** most popular outbound destination for Austrian travellers with **3.6 million trips** in 2016

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

Population: 8.7 million
Per capita GDP: €39,897; biggest segment for travel to Germany: holidays (47%)

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

Germany was the **no. 1** outbound destination for Czech travellers with **2.3 million trips** in 2016

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

Population: **10.6 million**
Per capita GDP: **€16,400**; biggest segment for travel to Germany: **holidays (53 %)**

Germany was the **second** most popular outbound destination for Hungarian travellers with **0.6 million trips** in 2016

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

Population: **9.9 million**
Per capita GDP: **€11,600**; biggest segment for travel to Germany: **holidays (34 %)**

Germany was the **second** most popular outbound destination for Slovenian travellers with **0.5 million trips** in 2016

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

Population: **2.0 million**
Per capita GDP: **€19,141**; biggest segment for travel to Germany: **holidays (41 %)**

Czech Republic

The Czech Republic continues to grow at a significantly higher rate than the European average and has firmly established its position within Germany's top 20 markets for inbound tourism.

Holidaymakers account for 53 per cent of all trips from the Czech Republic to Germany, while trips to see friends and relatives make up 18 per cent. With an average age of 39, Czech visitors to Germany are some of the youngest. Nevertheless, the proportion of them that had been to Germany at least four times before was unusually high in 2016, at 76 per cent. A high proportion of these trips are spur of the moment – only 51 per cent of people booked parts of their trip in advance. Online bookings are still relatively low, at 45 per cent.

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.

Inbound travel volumes comprise more holidays than business trips, with holidaymakers accounting for 34 per cent of the market. 29 per cent of inbound travel is for business purposes, most often in the form of traditional business trips. City breaks and events (52 per cent) are in particularly high demand among holidaymakers. Almost a fifth of Hungarian holidaymakers travel to the traditional holiday regions. Half of the visitors to Germany from Hungary fall within the young age group of holidaymakers (15 to 35 year olds).

Slovenia

The volume of overnight stays made by visitors from Slovenia remains on a positive growth trajectory. Moreover, Germany is clearly benefiting in the long term from Slovenians' high propensity for travel (two outbound trips per year). This is reflected in the rising proportion of visitors choosing to holiday in Destination Germany, which accounted for 37 per cent of the overall Slovenian market in 2016 (2015: 32 per cent). 22 per cent of trips made are visits to see friends and family and other types of travel. Slovenian holidaymakers like to visit cities and events (41 per cent) or to go on multi-destination tours (36 per cent). Demand is also high for theme parks, automotive discovery centres and family holidays.

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.

Slovakia

Slovakia's current market share of inbound tourism to Germany is only 0.5 per cent, but the market has significant potential for growth.

The proportion of business trips is above average, at 46 per cent; around 26 per cent of Slovakian visitors to Germany come for a holiday. The younger age bracket (15 to 34 years old) makes up 58 per cent of holidaymakers; the average age of Slovakian holidaymakers is 32.3 years.

Bosnia and Herzegovina, Bulgaria, Croatia, Montenegro, Romania, Serbia

The high-potential markets in the Balkans currently generate around 2.6 million trips to Germany every year. Marketing activities are run from the regional office in Belgrade, which the GNTB opened in 2012 in collaboration with the Danube Competence Center.

Of the growth drivers in the region, the star performer is Romania, which in 2016 generated an increase of 10.1 per cent to reach 882,000 overnight stays. The Bulgarian market expanded by 4.7 per cent to 292,000 overnight stays, and Croatia surged again, by 14.6 per cent to 330,000 overnight stays. The sales and marketing agency in Belgrade also manages the GNTB's activities in Serbia, Montenegro and Bosnia and

Germany was the **fourth** most popular outbound destination for Slovakian travellers with **0.6 million trips** in 2016

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

Population: **5.4 million**
Per capita GDP: **€15,000**; biggest segment for travel to Germany: **business travel (46 %)**

Germany was the **no. 1** outbound destination for travellers from the Balkans with **2.6 million trips** in 2016

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

Herzegovina. Germany is among the most popular outbound destinations for travellers from these countries. Economic development in the region remains inconsistent, but the commercial potential is high across the board.

Top destinations in Germany / federal states

	1st	2nd	3rd
AUSTRIA	Bavaria 39.2%*	Baden-Württemberg 13.6%*	Berlin 9.7%*
CZECH REPUBLIC	Bavaria 32.2%*	Baden-Württemberg 12.6%*	Berlin 9.8%*
HUNGARY	Bavaria 33.4%*	Baden-Württemberg 19.7%*	North Rhine-Westphalia 10.9%*
SLOVAKIA	Bavaria 29.0%*	Baden-Württemberg 15.4%*	North Rhine-Westphalia 11.3%*
SLOVENIA	Bavaria 31.3%*	Baden-Württemberg 18.5%*	Hessen 11.2%*
ROMANIA	Bavaria 27.2%*	Baden-Württemberg 15.1%*	North Rhine-Westphalia 13.6%*
BULGARIA	Bavaria 22.5%*	North Rhine-Westphalia 13.5%*	Hessen 13.5%*

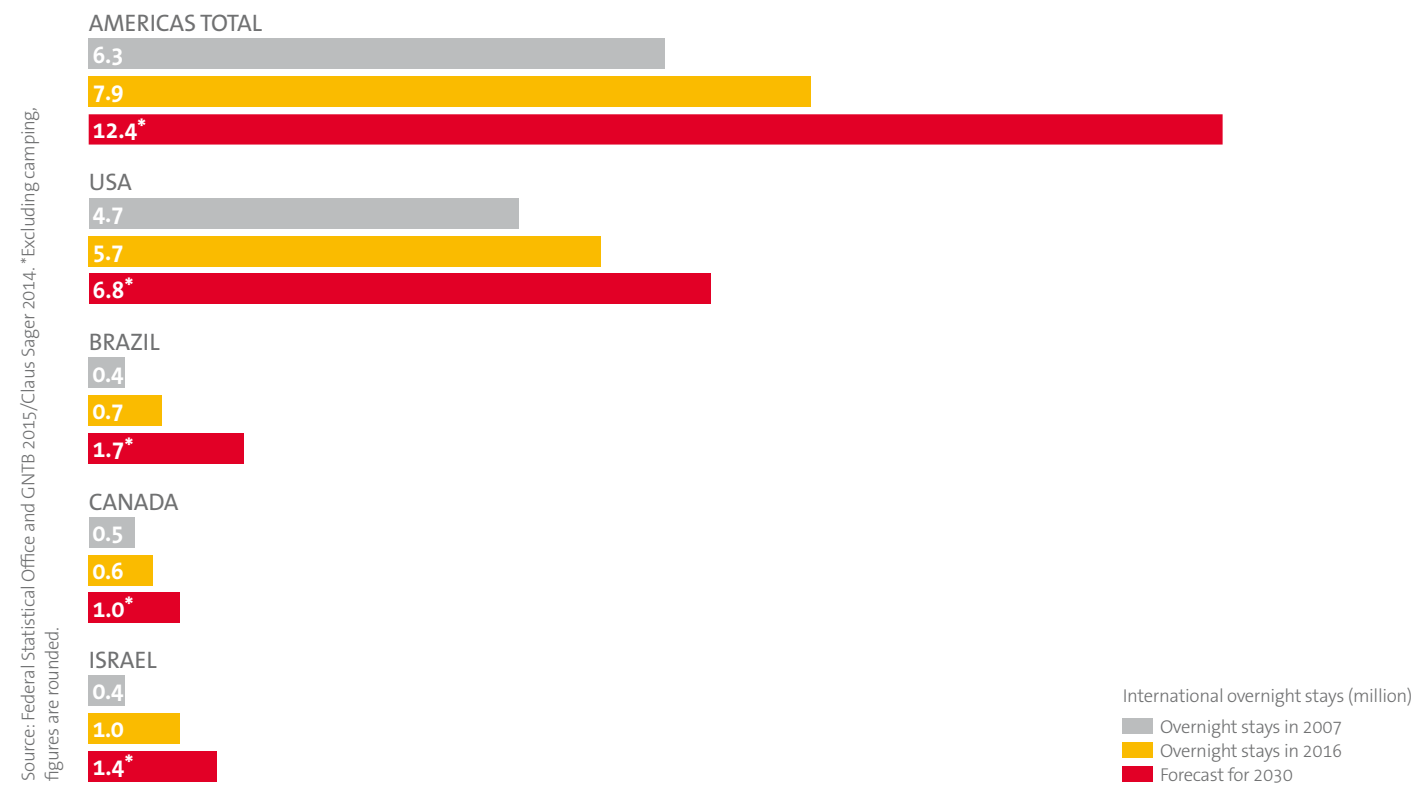
2016 statistics / *Federal states share of all overnight stays from the market concerned. Source: Federal Statistical Office.

Regional Management Americas / Israel

In the year under review, the Americas/Israel region generated cumulative growth of 1.2 per cent to exceed nine million overnight stays. The GNTB began 2016 by expanding its activities in Argentina and Chile through the creation of a new sales and marketing agency in Buenos Aires, which commenced operations at the start of 2017. The Mexican market has been covered by the GNTB office in New York since 2016.



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 7.1 per cent. It is also by far the biggest overseas market for inbound tourism to Germany.

Half of all guests travelling from the USA to Germany are holidaymakers and their preferred activity is sightseeing in traditional tourist destinations.

The GNTB's USA office is making a concerted effort to position Germany as a land of discoveries. This involves targeted marketing of cultural aspects, the Magic Cities and the Historic Highlights of Germany, as well as the luxury travel segment.

Germany was the **fourth** most popular European destination for US travellers with **2.0 million trips** in 2015

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

Population: 324.0 million
Per capita GDP: US\$ 57,294; biggest segment for travel to Germany: holidays (50%)

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

Brazil

Over the course of the year, Brazil's tourism market continued to suffer the effects of the country's economic crisis. In early 2017, however, the country returned to growth again, signalling an easing of the downturn.

The GNTB promotes a variety of marketing themes in Brazil, including city breaks in collaboration with the Magic Cities, 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 2015

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

Population: 205.8 million
Per capita GDP: US\$ 8,586.50; biggest segment for travel to Germany: holidays (65 %)

Canada

In the year under review, Canada fell just short of the previous year's result for the second time in a row.

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 in 2017 is spiritual travel, in which the Reformation anniversary plays a major role. Other themes that are used to target this particular market include cities, palaces and castles, German heritage, LGBT, active pursuits, affordable hospitality and Christmas.

Germany was the **third** most popular European destination for Canadian travellers with **0.4 million trips** in 2015

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

Population: 35.4 million
Per capita GDP: US\$ 42,319; biggest segment for travel to Germany: holidays (75 %)

Israel

Registering growth of 0.9 per cent, Israel's contribution to Germany's inbound tourism sector exceeded one million overnight stays for the first time.

72 per cent of all Israelis visiting Germany are holidaymakers; just over a fifth are business travellers. At 81 per cent, the proportion of people making their bookings online is above average.

In its marketing for Israel the GNTB focuses on Germany's positive image and value for money. The GNTB is also 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 2015

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

Population: 8.2 million
Per capita GDP: US\$ 36,557; biggest segment for travel to Germany: holidays (72 %)

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.

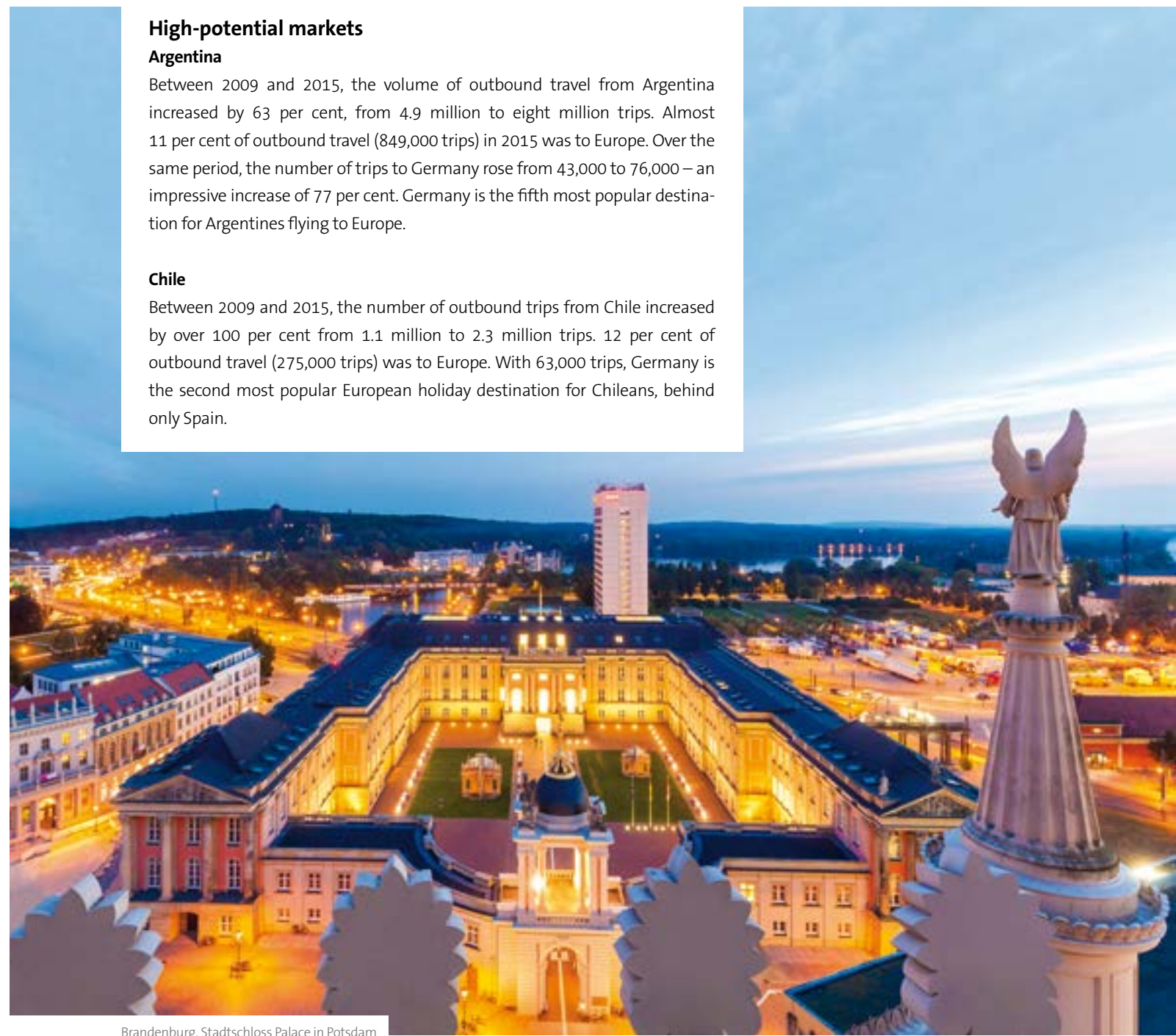
High-potential markets

Argentina

Between 2009 and 2015, the volume of outbound travel from Argentina increased by 63 per cent, from 4.9 million to eight million trips. Almost 11 per cent of outbound travel (849,000 trips) in 2015 was to Europe. Over the same period, the number of trips to Germany rose from 43,000 to 76,000 – an impressive increase of 77 per cent. Germany is the fifth most popular destination for Argentines flying to Europe.

Chile

Between 2009 and 2015, the number of outbound trips from Chile increased by over 100 per cent from 1.1 million to 2.3 million trips. 12 per cent of outbound travel (275,000 trips) was to Europe. With 63,000 trips, Germany is the second most popular European holiday destination for Chileans, behind only Spain.



Brandenburg, Stadtschloss Palace in Potsdam

Top destinations in Germany / federal states

2016 statistics / *Federal state's share of all over-night stays from the market concerned. Source: Federal Statistical Office

	1st	2nd	3rd
USA	Bavaria 27.7%*	Berlin 19.6%*	Hessen 14.4%*
BRAZIL	Berlin 31.4%*	Bavaria 26.5%*	Hessen 11.1%*
CANADA	Bavaria 26.2%*	Berlin 24.9%*	Hessen 12.0%*
ISRAEL	Berlin 48.0%*	Baden-Württemberg 22.5%*	Bavaria 11.8%*

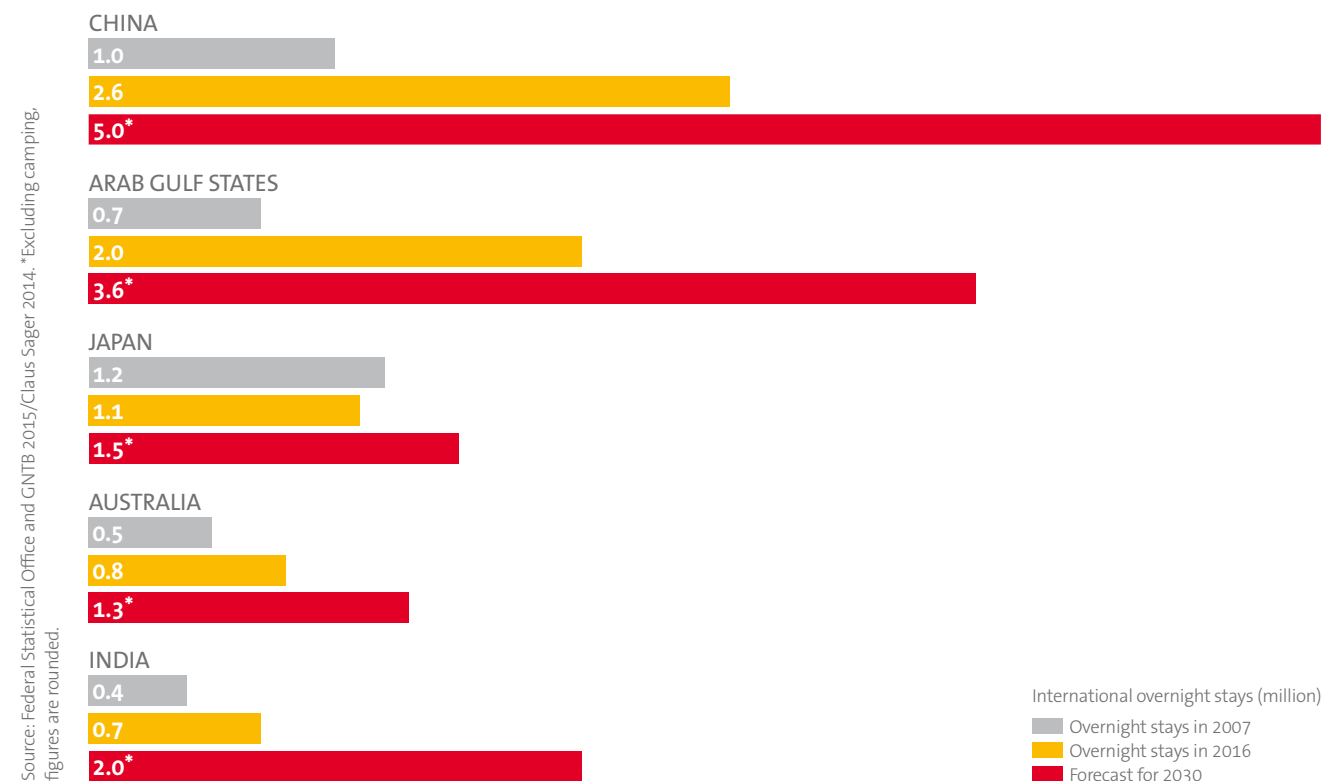
- Foreign representative offices for Asia / Pacific
- Sales and marketing agencies
- Regional Management Asia / Pacific



Regional Management Asia / Pacific

In the year under review, the Asian markets relinquished their status as drivers of growth for inbound tourism to Germany. The buoyant growth seen from China and the Arab Gulf States in recent years has come to an end. Japan, a traditionally strong source market, is registering further decline, although South Korea and India are delivering significant growth. Demand for tourism is rising sharply in markets such as Singapore, Taiwan, Thailand and Indonesia. The GNTB is harnessing this potential through its new sales and marketing agency in Singapore.

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



China

In the year under review, growth from Germany's biggest Asian source market slowed temporarily as a result of the economic downturn. Moreover, increasing numbers of Chinese tourists were discovering other European destinations. The tourism market began to recover towards the end of the year.

The GNTB focuses its marketing activities in China and Hong Kong on tourism offerings that are in particularly high demand from those markets, such as visits to cities that offer lifestyle appeal and shopping. Chinese tourists are big spenders and are by far the leading group when it comes to duty-free shopping. Nature destinations are also in high demand.

Germany was the **no. 1** European destination for Chinese travellers with **1.5 million trips** in 2015

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

Population: 1.4 billion
Per capita GDP: US\$ 8,260.90; 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.

Japan / South Korea

The traditionally strong Japanese source market is currently still in decline. Japanese people are particularly concerned about security, and the recent terrorist attacks have dampened their appetite for travel to Europe. Nevertheless, Japan is still Destination Germany's fourth largest overseas market.

South Korea, by contrast, is registering steady growth. At 38 per cent, its proportion of business travel is above the average. Multi-destination tours are the most popular type of holiday for South Koreans (56 per cent).

Looking ahead to the Reformation anniversary in 2017, spiritual travel is a key focus in marketing activities.

Australia

Australia is a market that has the potential to deliver long-term growth for inbound tourism to Germany.

Holidaymakers account for 81 per cent of all Australian travellers in Germany. The proportion of Australian visitors to Germany in the 55-plus age bracket is above the average, at 44 per cent.

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 from Australia over the coming years. There is potential for this market to be delivering 900,000 overnight stays a year by 2020.

India

India has consolidated its position for inbound tourism to Germany among the Asian source markets by virtue of long-term steady growth that continued throughout 2016 and into 2017.

Business trips account for 49 per cent of this market; holidays make up 46 per cent. Almost three quarters of Indians book their trip to Germany on the internet. Just under half of all Indian holidaymakers in Germany opt for multi-destination tours.

Germany was the **third** most popular European destination for Japanese travellers with **0.5 million trips** in 2015

1st ITALY	4th SPAIN
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2nd FRANCE	5th UK
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3rd GERMANY	
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Population: Japan 126.7 million; South Korea 50.9 million
Per capita GDP: Japan US\$ 37,304; South Korea \$US 27,633;
biggest segment for travel to Germany: holidays (70%)

Germany was the **fourth** most popular European destination for Australian travellers with **0.2 million trips** in 2015

1st UK	4th GERMANY
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2nd ITALY	5th GREECE
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3rd FRANCE	
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Population: 23.0 million
Per capita GDP: US\$ 51,593; biggest segment for travel to Germany: holidays (81%)

Germany was the **second** most popular European destination for Indian travellers with **0.3 million trips** in 2015

1st UK	4th TURKEY
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2nd GERMANY	5th AUSTRIA
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3rd SWITZERLAND	
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Population: 1.3 billion
Per capita GDP: US\$ 1,718.7; biggest segment for travel to Germany: business travel (49%)

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.

Arab Gulf States

The GNTB's Dubai office covers a total of six countries in the Gulf region: Bahrain, Qatar, Kuwait, Saudi Arabia, Oman and the United Arab Emirates. In each of these countries there are two demographics to consider. As well as native Arab residents, a large number of expats live in the Gulf Cooperation Council nations. Trips to Europe are mainly made by the locals, whereas trips to Asia are mainly undertaken by expats. After years of above-average growth, 2016 saw inbound tourism from the region decline for the first time.

Medical travel and shopping are the main travel incentives. Going forward, in addition to the traditional family holiday, there will be an increased marketing focus on young travellers aged under 25.

Germany was the **no. 1** European destination for travellers from the Arab Gulf States* with **0.6 million trips** in 2015

1st GERMANY	4th FRANCE
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2nd UK	5th AUSTRIA
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3rd TURKEY	
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* Saudi Arabia, UAE, Kuwait.

Population: Saudi Arabia 28.2 million; Kuwait 2.8 million;
Per capita GDP: Saudi Arabia US\$ 19,922; Kuwait US\$ 26,146;
biggest segment for travel to Germany: holidays (69%)

High-potential markets

Indonesia

Between 2009 and 2015, the volume of outbound travel from Indonesia increased by 72 per cent, from 5.1 million to 8.8 million trips. Roughly 1.4 million trips made in 2015 were to Europe, of which around 278,000 were to Germany.

Singapore

Between 2009 and 2015, the volume of outbound travel from Singapore increased by 22 per cent, from 5.5 million to 6.7 million trips. 6 per cent of these trips were to Europe. The number of trips to Germany over the same period rose from 39,000 to 65,000, a particularly strong increase of 66 per cent. Germany is the third most popular European travel destination after the UK and Italy.

Malaysia

Between 2009 and 2015, the volume of outbound travel from Malaysia increased by more than two thirds, from 3.5 million to 5.9 million trips. 9 per cent of trips were to Europe, and of these 12 per cent were to Germany. Germany is the fourth most popular European travel destination for Malaysians with 62,000 trips.

Thailand

Between 2009 and 2015, the volume of outbound travel from Thailand increased by almost two thirds, from 2.4 million to four million trips. 11 per cent of trips were to Europe, and of these 16 per cent were to Germany. Germany is the number one European destination for Thai travellers with 71,000 trips.

Top destinations in Germany / federal states

	1st	2nd	3rd
CHINA	Bavaria 28.2%*	Hessen 19.7%*	Baden-Württemberg 13.3%*
ARAB GULF STATES	Bavaria 40.4%*	Hessen 17.0%*	North Rhine-Westphalia 12.5%*
JAPAN	Bavaria 28.0%*	Hessen 18.9%*	North Rhine-Westphalia 15.5%*
AUSTRALIA	Berlin 35.0%*	Bavaria 27.9%*	Hessen 8.8%*
INDIA	Baden-Württemberg 24.0%*	Hessen 19.7%*	Bavaria 19.2%*

2016 statistics / *Federal state's share of all overnight stays from the market concerned. Source: Federal Statistical Office.

Administration

Perfectly organised
for efficient operation

Administration

In 2016, 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 slightly in 2016. 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. Almost 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) intends to maintain last year's increase in the federal grant for the coming years too, so as to provide planning certainty until 2021. This will see the BMWi continue to make a major contribution to the GNTB's funding, which will help the organisation to expand its work into new markets and make further progress in meeting the requirements of utilising digital technologies in its global activities.

The ministry underlines 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 in 2016 could be maintained at the 2015 level – a record-breaking year.

€7.5 million in income from services

This also made it possible to expand the international network for promoting Destination Germany.

Income

The GNTB's operating results showed yet another improvement in 2016. The income from services increased by €71,000 (up by 1 per cent) to €7,539,000. This stable income combined with the maintenance of the GNTB's grant saw the total budget rise slightly to €38.8 million.

Income from grants and contributions went up by 3.1 per cent to €799,000. Non-cash contributions from our tourism partners rose to €1.35 million.

Expenditure

Despite an increase in personnel costs due to collectively agreed pay rises, marketing expenditure remained at a high level of €24,267,000 (2015: €24,503,000). The non-cash contribu-

tions from tourism partners in 2016, which amounted to €1.35 million, were used for additional marketing spend.

Investment levels rose by 5.2 per cent to €321,000, primarily because of the expenditure on information technology procurement. In other operating expenses, however, savings of €127,000 were made, with only €2,722,000 being spent (down by 4.5 per cent).

Collectively agreed pay rises resulted in a €349,000 increase in personnel costs, which went up from €11 million to €11.4 million.

GNTB financial overview: sources and appropriation of funds¹⁾

INCOME	2016	%	2015	%	2014	%	2013	%	2012	%	2011	%	2010	%
Income from services	7,539	19.5	7,468	19.3	7,288	20.1	7,320	20.2	6,041	17.5	6,717	18.7	7,381	20.3
Grants from the BMWi	30,414	78.5	30,508	78.7	28,302	77.9	28,273	78.0	27,713	80.5	27,040	75.3	26,622	73.1
Grants from the federal states	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	1,473	4.1	1,790	4.9
Grants and contributions from members	799	2.1	775	2.0	733	2.0	649	1.8	684	2.0	664	1.8	633	1.7
Income from GNTB budget²⁾	38,753	100.0	38,752	100.0	36,323	100.0	36,242	100.0	34,438	100.0	35,894	100.0	36,426	100.0
Income from special projects ³⁾	135		109		121		352		117		523		387	
Total income (consolidated)	38,887		38,860		36,444		36,594		34,555		36,417		36,813	

EXPENDITURE	2016	%	2015	%	2014	%	2013	%	2012	%	2011	%	2010	%
Personnel expenditure for marketing and administration	11,443	29.5	11,094	28.6	10,625	29.3	10,420	28.8	10,201	29.6	10,292	28.7	10,130	27.8
Other operating expenses	2,722	7.0	2,849	7.4	2,868	7.9	2,700	7.4	3,252	9.04	2,955	8.2	3,395	9.3
Capital investment	321	0.8	305	0.8	314	0.9	502	1.4	40	0.1	102	0.3	563	1.5
Marketing costs	24,267	62.6	24,503	63.2	22,516	62.0	22,620	62.4	20,945	60.8	22,545	62.8	22,338	61.3
Expenditure from GNTB budget²⁾	38,753	100.0	38,751	100.0	36,323	100.0	36,242	100.0	34,438	100.0	35,894	100.0	36,426	100.0
Expenditure on special projects ³⁾	135		109		121		352		117		523		387	
Total expenditure (consolidated)	38,887		38,860		36,444		36,594		34,555		36,417		36,813	

1) Expressed in thousands of euros.

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

3) Project funding and externally funded projects.

A look ahead to 2017

The digitisation of finance-related processes continues to be a focus for the GNTB in 2017. 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 sustainabil-

ity (paperless office) and the development of a lean and efficient administration system are key to this approach.

Information technology

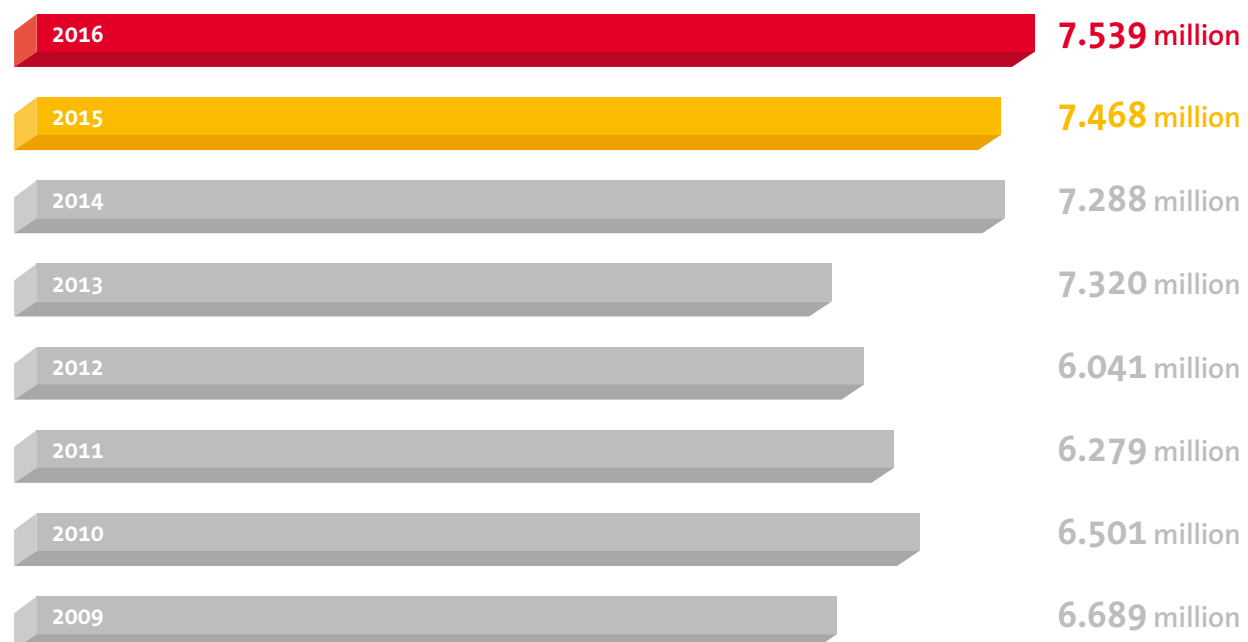
The consolidation of the network infrastructure (LAN and WAN) was completed in 2016. The connection linking

Marketing costs of €24.3 million

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

the GNTB's foreign representative office to its Frankfurt headquarters was switched over to a high-performance MPLS system.

Income from international marketing services



The GNTB was also able to establish its own IP address range, as planned. The GNTB is now registered as its own internet provider, which means it has a proprietary IP address range. This eliminates the problems and expense involved in changing internet providers.

The reconfiguration of the server landscape at head office, which began in 2015, progressed further with the ongoing transition to a virtual server structure. A system-monitoring solution was installed and configured to ensure the functioning of the IT infrastructure.

A ticket system was implemented to help improve the way in which IT service management performs its tasks.

Logistics

The GNTB's logistics and distribution department delivers brochures and other promotional items to the 32 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.

The department was restructured to take account of the fall in demand for printed materials caused by the growing use of digital technologies.

Logistics' main task is to pick, package, dispatch and return materials as and when required for trade fairs, workshops and roadshows. The local storage facilities in Paris and London were closed and integrated into the head office's facility in Frankfurt.

Human resources

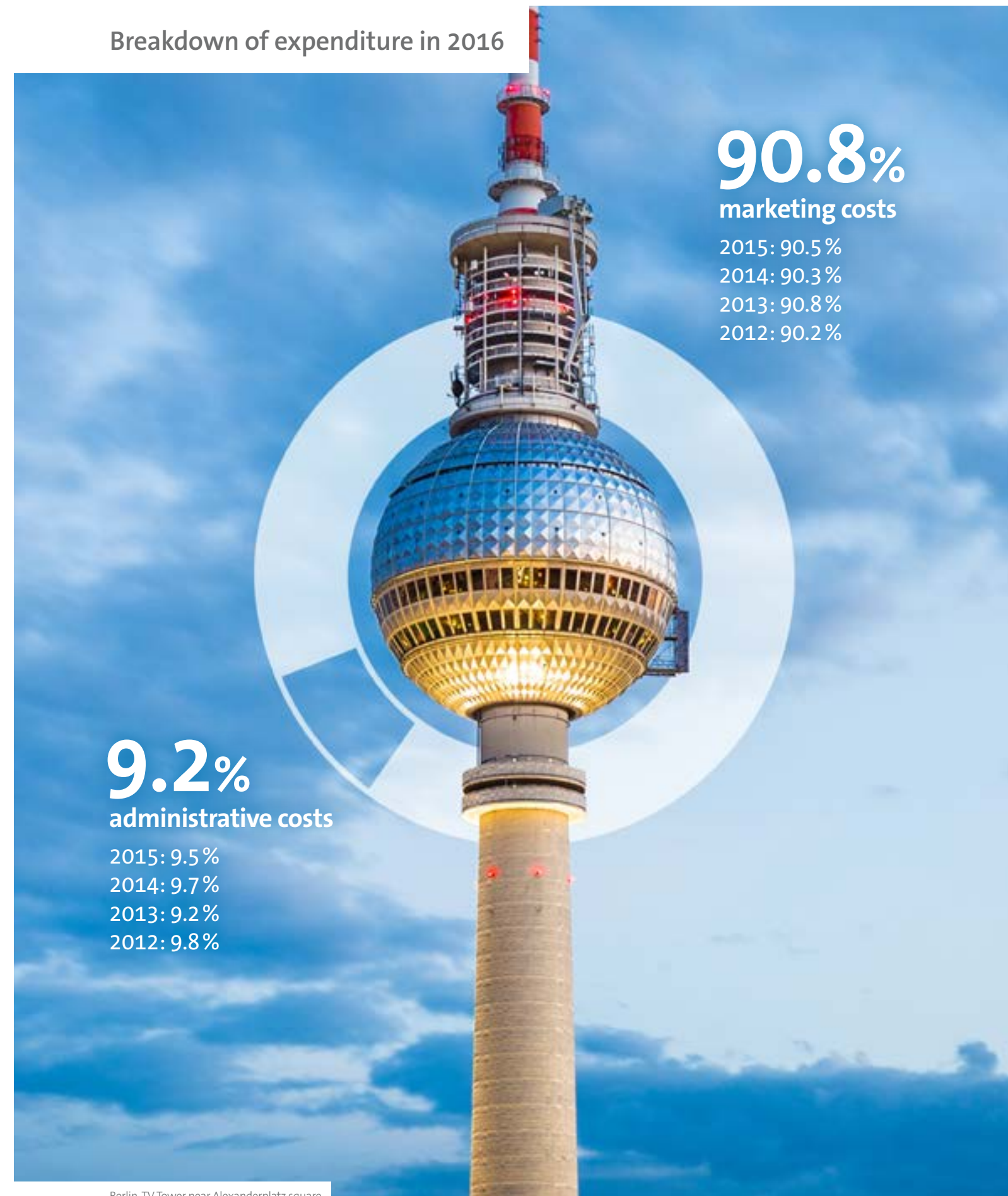
The GNTB employment plan for 2016 covered 152.1 positions. Of this total, 74.1 are at head office, 76 are based abroad, and there are two executive positions. The changes to the employment plan are partly a result of a member of staff having completed

her pre-retirement part-time employment arrangement and her temporary post not being refilled, and partly because the GNTB was able to secure three extra posts in the marketing department, having proven the need for additional staff.

In addition to the budgeted employees, whose positions are laid out in the employment plan, 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.

The Executive Board would like to thank all employees for their prudent management of costs and budgets in 2016 and, more importantly, for their dedication and commitment to the GNTB cause. It is, after all, the workforce that carries this organisation, and recognition and thanks are due to each and every employee.

Breakdown of expenditure in 2016



Berlin, TV Tower near Alexanderplatz square

Developing young talent at the GNTB Apprenticeships

For 40 years, the GNTB has been training young talented individuals by means of two formally recognised vocational apprenticeships in Leisure & Tourism, and Tourism (for private and business travel). In 2016, two apprentices passed their final exam ahead of schedule. Seven new apprentices started at the GNTB in August, meaning there are currently 13 on the GNTB team. 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. Our apprentices are posted on the counters at the ITB and GTM trade fairs so that they can gain important knowledge and experience

for their future careers in tourism. Last autumn, management of the GNTB's apprenticeship scheme was successfully handed down to the next generation of talent.

Expanding the internship scheme

Students on bachelor or masters courses acquire theoretical knowledge of a vocation through their studies. To enable them to put this theory into practice and to obtain new insights into the industry, the GNTB offers student internships. Students from different specialisms can complete their mandatory placements both at the GNTB head office and in the foreign representative offices, giving them the chance to see the work processes in action and gain experience in the tourism trade. In 2016, 15 students completed their internships (of between three and six months) at the Frankfurt head office.

They worked in areas such as market research, media management, press, international markets and finance.

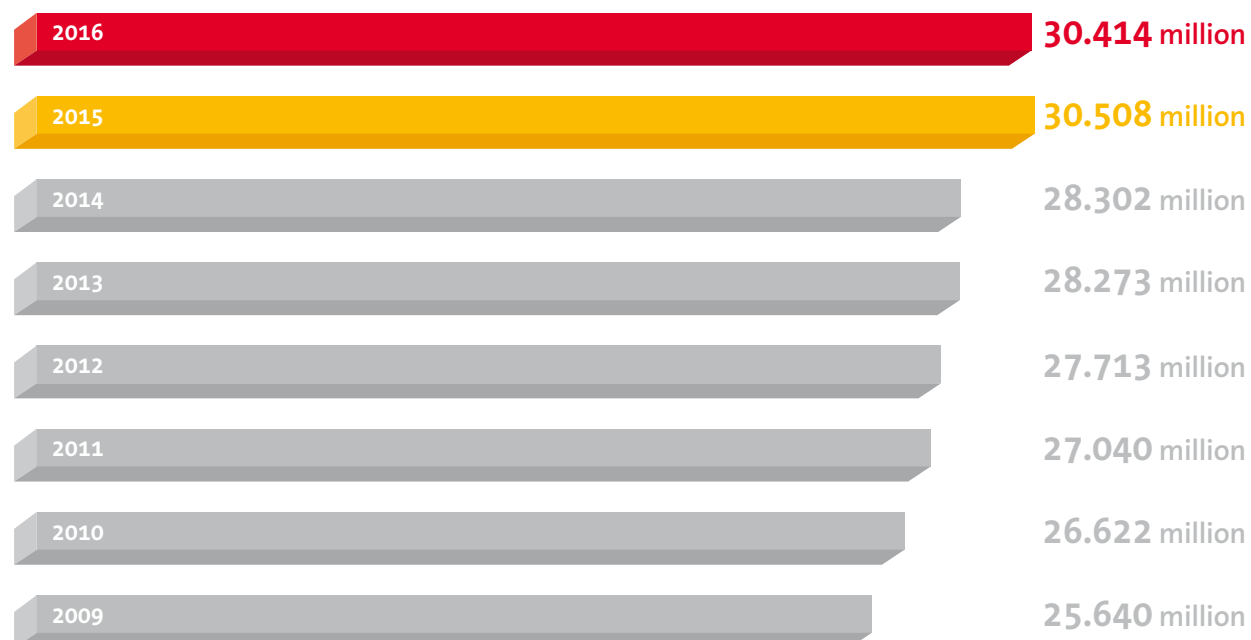
HR development at the GNTB

Continuing professional development (CPD) gives a workforce the flexibility it needs to quickly adapt in response to changes in the market. The GNTB runs a CPD programme that enables employees to refresh, refine and expand their expert knowledge and that is based on the organisation's skills requirements. Virtually every GNTB employee has taken part in one or more CPD event. Depending on the requirements and the topic, the staff either join external training programmes or attend in-house courses that have been specially tailored to the GNTB's needs. In 2016, we were able to offer our heads of department a management course that incorporated a coaching element.

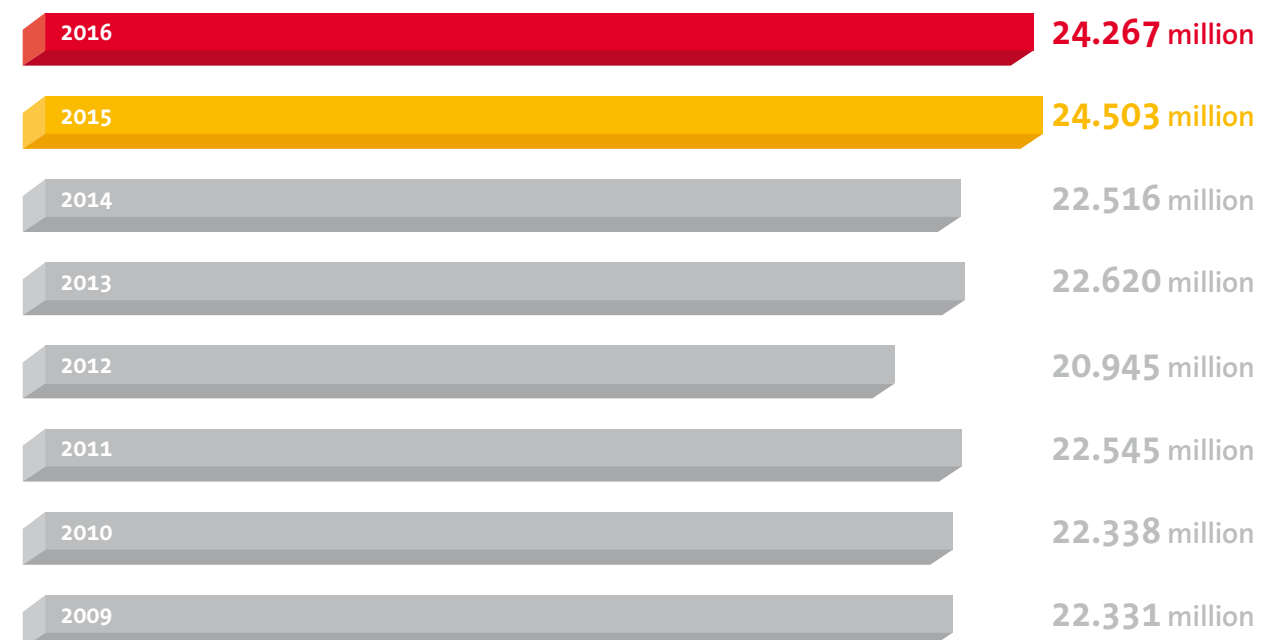


Saarland, UNESCO World Heritage Völklingen Ironworks

Grants from the Federal Ministry for Economic Affairs and Energy



Marketing costs

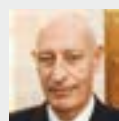


Members of the GNTB Board of Directors

(as at June 2017)

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,
Honorary President of the German Hotel and Restaurant Association (DEHOGA)



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

Other elected members



Jens Bischof, Board Member Responsible for Sales, Marketing and Product, Passenger Business, Deutsche Lufthansa AG, until 31 Dec 2016



Birgit Bohle,
Chief Executive Officer of DB Fernverkehr AG



Andreas Braun,
Managing Director of Tourismus Marketing GmbH Baden-Württemberg



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



Richard Eberhardt, Honorary President of RDA International Coach Tourism Federation



Thomas Ellerbeck,
Member of the Group Executive Committee, TUI Group



Norbert Fiebig,
President of the German Travel Association (DRV)



Dr Monika Gommolla,
Chairperson of the Supervisory Board, MARITIM Hotelgesellschaft mbH



Dr Christian Göke,
Chief Executive Officer of Messe Berlin GmbH



Ernst Hinsken, President of German Spa Association (until 1 February 2015)



Andreas von Puttkamer,
Head of the Aviation Division, Flughafen München GmbH



Regine Sixt,
Senior Executive Vice President of SIXT International, SIXT SE

Ministerial representatives



Dagmar Rothacher, Ministerial Director in charge of Sub-department VII D, Working Group for Matters of the New Federal States Federal Ministry for Economic Affairs and Energy (BMWi)



Markus Siebels, Ministerial Counsellor, Head of Department II A3 Federal Ministry of Finance

Invited members



Iris Gleicke, MdB, 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 2017)

elected at the 117th general meeting on 11 December 2014

Chairman

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

First Deputy Chairman

Burkhard Kieker,
Managing Director of Berlin Tourismus & Kongress GmbH

Second Deputy Chairman

Walter Krombach,
Managing Director of the Willy Scharnow Tourism Foundation, until 31 March 2017

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 of 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

Administrative Director Iris Reimold,
Head of Department G 10 (fundamental issues), Federal Ministry of Transport and Digital Infrastructure

Dr Dirk Rotenberg,
Head of Department 405 (Digital Transformation and Mobility), 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 matters in the federal states

BADEN-WÜRTTEMBERG

Ministerial Counsellor Fred-Jürgen Stradinger,
Ministry of Justice and European Affairs

BAVARIA

TBC,
Ministry of State for Economic Affairs and Media, Energy and Technology

BERLIN

Dr Dietrich Kalkum,
Senate Department for Economics, Energy and Public Enterprises

BRANDENBURG

Ministerial Counsellor Martin Linsen,
Ministry for Economics and Energy

FREE HANSEATIC CITY OF BREMEN

Dr Christel Lübben,
Senator for the Economy, Labour and Ports

FREE HANSEATIC CITY OF HAMBURG

Bernd Meyer,
Office of Economics, Transport and Innovation

HESSEN

Ministerial Counsellor Ulrike Franz-Stöcker,
Ministry of Economics, Energy, Transport and Regional Development

MECKLENBURG-WESTERN POMERANIA

Gerd Lange,
Ministry for Economics, Labour and Health

LOWER SAXONY

May-Britt Pürschel,
Ministry for Economics, Labour and Transport

NORTH RHINE-WESTPHALIA

Frank Butenhoff,
Ministry for Economic Affairs, Energy, Industry, SMEs and Skilled Trade

RHINELAND-PALATINATE

Nicole Dawood-Klein,
Ministry of Economics, Transport, Agriculture and Viticulture

SAARLAND

Administrative Director Dr Rainer Schryen,
Ministry for Economics, Labour, Energy and Transport

SAXONY

Ministerial Counsellor Frank Ortmann,
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

THURINGIA

Olaf Dirlam,
Ministry of Economics, Science and Digital Society

GNTB sponsors

There are currently 16 GNTB sponsors

Members of the GNTB International Marketing Committee

(as at June 2017)

elected at the 117th general meeting on 11 December 2014

Elected members

Dr Bettina Bunge,
Managing Director of
Dresden Marketing GmbH

Yvonne Coulin,
CEO and Manager of Congress- und
Tourismus-Zentrale Nürnberg
Verkehrsverein Nürnberg e.V.

Thomas Feda,
Managing Director of 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 of
Berlin Tourismus & Kongress GmbH

BREMEN

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

MECKLENBURG-WESTERN POMERANIA

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

LOWER SAXONY

Carolin Ruh,
Managing Director of
Tourismus Marketing Niedersachsen GmbH

NORTH RHINE-WESTPHALIA

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

SAARLAND

Birgit Grauvogel,
Managing Director of
Tourismus Zentrale Saarland GmbH

SCHLESWIG-HOLSTEIN

Frank Behrens,
Interim Managing Director of Tourismus-
Agentur Schleswig-Holstein GmbH

THURINGIA

Bärbel Grönegres,
Managing Director of
Thüringer Tourismus GmbH

Ex officio members

The 55 tourism companies and associations that are members of the GNTB

ACCOR HOTELLERIE DEUTSCHLAND GMBH
Katharina Bögerl, Trade and Marketing
Manager

AIR BERLIN GMBH & CO. LUFTVERKEHRS KG
TBC

ALLGEMEINER DEUTSCHER
FAHRRAD-CLUB E.V. (ADFC)
(German Cyclists' Federation)
Gabi Bangel, Head of Tourism

AUTOSTADT GMBH
Jan Krawitz, Project Manager,
Sales and Marketing

AVIS AUTOVERMIETUNG GMBH & CO. KG
Klaus Tusche, Director of Marketing and
Partnerships

BEST WESTERN HOTELS
DEUTSCHLAND GMBH
Carmen Dücker, Deputy 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

DEUTSCHE LUFTHANSA AG
Nathali Hartkopf, Director of Trade
Association Policy and Sales Compliance

DEUTSCHER HEILBÄDERVERBAND E.V. (DHV)
(German Spa Association)
Uwe Strunk, Managing Director

DEUTSCHE HOSPITALITY
Mark Pfeiffer, Head of Corporate Branding
and Marketing

DEUTSCHER HOTEL- UND
GASTSTÄTTENVERBAND E.V. (DEHOGA)
(German International Hotel Association)
Markus Luthé, Chief Executive Officer

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 JUGENDHERBERGSWERK/
HAUPTVERBAND
(German Youth Hostel Association/
Central Association)
Oliver Peters, Deputy Chief Executive Officer

DEUTSCHES WEININSTITUT GMBH (DWI)
(German Wine Institute)
Monika Reule, Managing Director

EUROPÄISCHE REISEVERSICHERUNG AG
Hans Stadler, ERV Tourism Sales Manager

Ex officio members

(continued)

EUROPA-PARK GMBH & CO MACK KG
Rüdiger Büchele, Head of Sales and Tourism

FLIXBUS DACH GMBH
Kay Manazon, Head of Sales

FLUGHAFEN DÜSSELDORF GMBH
Eckhard Mischke, Head of Consumer
Marketing

FLUGHAFEN MÜNCHEN GMBH
Andreas von Puttkamer, Head of the
Aviation Division

FRAPORT AG
Susanne D. Schick, Senior Manager
for Sales & Customer Relations

FRIEDRICHSTADT-PALAST
BETRIEBSGESELLSCHAFT MBH
Andrea Girardo-Crocini, Sales Manager
International

GALERIA KAUFHOF GMBH
Thomas Vollbrecht, Sales Management

GERMAN CONVENTION BUREAU E.V. (GCB)
Matthias Schultze, Managing Director

GERMANIA FLUGGESELLSCHAFT MBH
Vicky Kramer, Marketing Director

GLOBAL BLUE DEUTSCHLAND GMBH
Michael Mauerhoff, Head of Marketing Sales
(DE/AT/CH/CZ)

GOETHE-INSTITUT E.V.
Uta Beckmann, Sales Officer,
Goethe Institute in Germany

GCH HOTEL GROUP
Bart Beerkens, Vice President for
Commercial Operations

HANSE MERKUR REISEVERSICHERUNG AG
Susanne Löbkens, Sales Director

HISTORIC HIGHLIGHTS OF GERMANY E.V.
Björn Rudek, CEO/Managing Director

HOTELVERBAND DEUTSCHLAND (IHA) E.V.
(German International Hotel Association)
Markus Luthé, Chief Executive Officer

LINDNER HOTELS AG
Ulrich Pfeiffer, Corporate Director of Sales

LUFTHANSA CITY CENTER
INTERNATIONAL GMBH
Siri Palisaar, Senior Director
Business Development

MAGIC CITIES GERMANY E.V.
Armin Dellnitz, Chairman of the
Management Board

MARITIM HOTELGESELLSCHAFT MBH
René Halla, Global Sales Director

MCARTHURGLEN MANAGEMENT GMBH
Matthias Sinner, Regional Travel Marketing
Manager for Northern Europe

MESSE BERLIN GMBH
Dr Martin Buck, Director of the Travel &
Logistics Competence Center

NH HOTELES DEUTSCHLAND GMBH
Stefanie Schubert, Marketing Director

OUTLET-CITY METZINGEN, HOLY AG
Christina Gobil, Head of Sales/Tourism

RDA INTERNATIONALER
BUSTOURISTIK VERBAND E.V.
(RDA International Coach Tourism
Federation)
Dieter Gauf, Chief Executive Officer

REISE MISSION GMBH
Günter Grünwald, Managing Director

RINGHOTELS E.V. UND
RINGHOTELS SERVICE GMBH
Susanne Weiss, Chief Executive Officer and
Member of the Board

ROMANTIK HOTELS & RESTAURANTS AG
Marie-Sophie Zunino, Head of Marketing

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-Torsten Prah, Senior Sales Manager
FIT/INTERNATIONAL

THOMAS COOK AG
Nadja Schotte, Head of Category
Management – City and Domestic Travel

TRAINLINE
Mounir Laggouné, Country Manager for
Germany, Austria and Switzerland

TUI DEUTSCHLAND GMBH
Gerald Schmidt, Head of TUI
Product Management for Germany

UNESCO-WELTERBESTÄTTEN
DEUTSCHLAND E.V.
(German UNESCO World Heritage
Sites Association)
Claudia Schwarz, Chairperson

VALUE RETAIL MANAGEMENT
GERMANY GMBH
Kirsten Boos, Tourism Director for Germany

WELLNESS-HOTELS-DEUTSCHLAND GMBH
Michael Altewischer, Managing Director

WILLY SCHARNOW-STIFTUNG
FÜR TOURISTIK
(Willy Scharnow Foundation for Tourism)
Hans-Gustav Koch, Managing Director

Addresses of GNTB Regional Management Offices

Regional Management North West Europe

<p>NETHERLANDS</p> <p>GNTB foreign representative office Netherlands Haaksbergweg 51 1101 BR Amsterdam</p> <p>Michaela Klare michaela.klare@germany.travel Tel: +31 (0)20 311 3921</p>	<p>UK/IRELAND</p> <p>GNTB foreign representative office United Kingdom/Ireland 60 Buckingham Palace Road London, SW1W 0AH</p> <p>Klaus Lohmann until 31 July 2017 klaus.lohmann@germany.travel Tel: +44 (0)20 7317 0912</p>	<p>BELGIUM/LUXEMBOURG</p> <p>GNTB foreign representative office Belgium/ Luxembourg Gulledelle 93 1200 Brussels</p> <p>Jürgen Lettau juergen.lettau@germany.travel Tel: +32 (0)22 404 581</p>
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Regional Management North East Europe/Russia

<p>DENMARK</p> <p>GNTB foreign representative office Denmark Amaliegade 13 1256 Copenhagen</p> <p>Bo Lauridsen bo.lauridsen@germany.travel Tel: +45 (0)33 436 818</p>	<p>SWEDEN</p> <p>GNTB sales and marketing agency Sweden Tyska Turistbyrå AB Box 27104 SE-102 52 Stockholm</p> <p>Iris Müller iris.mueller@germany.travel Tel: +46 (0)86 651 884</p>	<p>NORWAY</p> <p>GNTB sales and marketing agency Norway c/o New Horizons Riplegården 9 5161 Bergen</p> <p>Sabine Koch sabine.koch@germany.travel Tel: +47 (0)48 341 105</p>
<p>POLAND</p> <p>GNTB sales and marketing agency Poland c/o Deutsch-Polnische Industrie- und Handelskammer ul. Miodowa 14 00-246 Warsaw</p> <p>Tomasz Pędzik tomasz.pedzik@germany.travel Tel: +48 (0)22 531 0528</p>	<p>RUSSIA</p> <p>GNTB sales and marketing agency Russia c/o Pro-Mark Company Serafimovicha street, 2, office 233 119072 Moscow</p> <p>Alla Belikova alla.belikova@germany.travel Tel: +7 (0)495 281 5125</p>	<p>FINLAND</p> <p>Marketing through Valve Communications Oy and Redland Oy</p> <p>Bo Lauridsen, GNTB Denmark bo.lauridsen@germany.travel Tel: +45 (0)33 436 818</p>

Regional Management South East Europe

<p>AUSTRIA AND SLOVAKIA</p> <p>GNTB foreign representative office Austria and Slovakia Mariahilfer Strasse 54 1070 Vienna</p> <p>László Dernovics laszlo.dernovics@ germany.travel Tel: +43 (0)1 5132 79210</p>	<p>CZECH REPUBLIC</p> <p>GNTB sales and marketing agency Czech Republic c/o Deutsch-Tschechische Industrie- und Handels- kammer Václavské náměstí 40 Stepanska 65, 11000 Prague</p> <p>Kamila Stojanovová Marketing Coordinator kamila.stojanovova@ germany.travel Tel: +420 (0)2 2149 0374</p>	<p>HUNGARY</p> <p>GNTB sales and marketing agency Hungary c/o Deutsch-Ungarische Industrie- und Handels- kammer Lövház u. 30. H-1024 Budapest</p> <p>Miklós Czeising miklos.czeising@ germany.travel Tel: +36 (0)13 457 633</p>	<p>SLOVENIA</p> <p>GNTB sales and marketing agency Slovenia c/o Deutsch-Slowenische Industrie- und Handels- kammer Poljanski nasip 6 1000 Ljubljana</p> <p>Maja Horvat maja.horvat@ germany.travel Tel: +386 (0)1 252 8855</p>	<p>BOSNIA AND HERZE- GOVINA, BULGARIA, CROATIA, MONTENEGRO, ROMANIA AND SERBIA</p> <p>GNTB sales and marketing agency Balkans c/o Danube Competence Center (DCC), Regionalbüro Knez Mihailova 9 11000 Belgrade</p> <p>Boris Čamernik boris.camernik@ danubecc.org Tel: +381 (0)11 655 7115</p>
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Regional Management South West Europe

<p>FRANCE</p> <p>GNTB foreign representative office France 8, rue de Milan 75009 Paris</p> <p>Beatrix Haun beatrix.haun@germany.travel Tel: +33 (0)140 200 507</p>	<p>SWITZERLAND</p> <p>GNTB foreign representative office Switzerland Freischützgasse 3 8004 Zurich</p> <p>Harald Henning harald.henning@germany.travel Tel: +41 (0)4 4213 2211</p>	<p>SPAIN/PORTUGAL</p> <p>GNTB foreign representative office Spain c/ San Augustin 2-1° derecha Plaza de las Cortes 28014 Madrid</p> <p>Ulrike Bohnet ulrike.bohnet@germany.travel Tel: +34 (0)9 1360 0393</p>	<p>ITALY</p> <p>GNTB foreign representative office Italy Foro Buonaparte 12 20121 Milan</p> <p>Ulrich Rüter ulrich.rueter@germany.travel Tel: +39 (0)2 0066 7791</p>
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Regional Management Americas / Israel

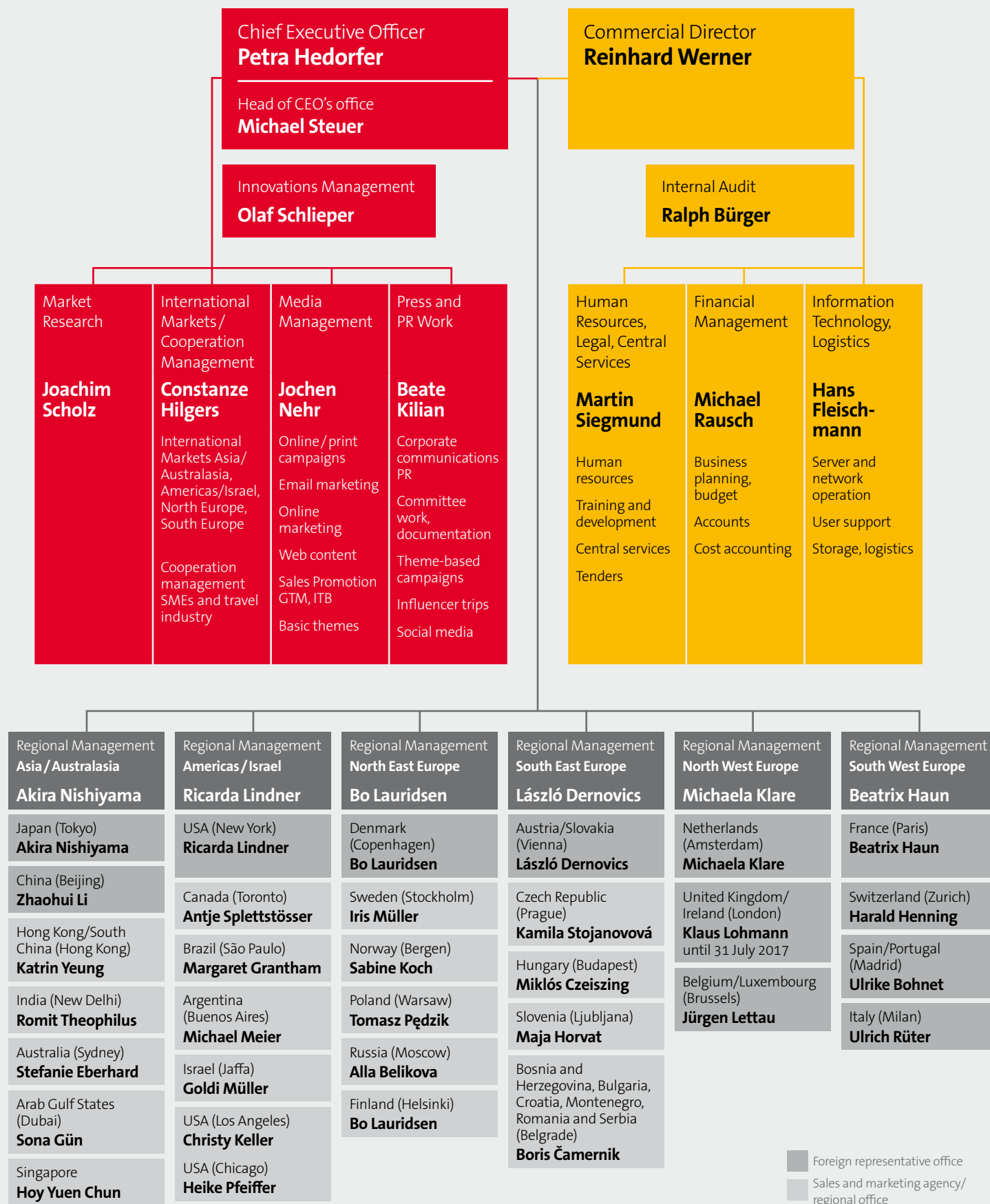
<p>USA/NEW YORK</p> <p>GNTB foreign representative office New York 122 East 42nd Street, Suite 2000 New York, N.Y. 10168-0073</p> <p>Ricarda Lindner ricarda.lindner@germany.travel Tel: +1 (0)212 661 7858</p>	<p>CANADA</p> <p>GNTB sales and marketing agency Canada c/o VoX International Inc 2 Bloor Street West, Suite 2601 Toronto, ON, M4W 3R1</p> <p>Antje Spletstösser antje.spletstoesser@ germany.travel Tel: +1 (0)416 935 1896 ext. 224</p>	<p>BRAZIL</p> <p>GNTB foreign representative office Brazil c/o Deutsch-Brasilianische Industrie- und Handelskammer Rua Verbo Divino 1488 – 3° andar 04719-904 São Paulo</p> <p>Margaret Grantham margaret.grantham@ germany.travel Tel: +55 (0)11 5187 5168</p>	<p>ARGENTINA</p> <p>GNTB sales and marketing agency Argentina/Chile c/o Deutsch-Argentinische Industrie- und Handelskammer Avenida Corrientes 327 AR - C1043AAD Buenos Aires</p> <p>Michael Meier michael.meier@germany.travel Tel: +54 (0)11 5219 4033</p>
<p>ISRAEL</p> <p>GNTB sales and marketing agency Israel c/o Lufthansa German Airlines 37, She'erit Israel Street 68165 Tel Aviv-Yafo</p> <p>Goldi Müller goldi.mueller@germany.travel Tel: +972 (0)35 135 307</p>	<p>USA/CHICAGO</p> <p>GNTB sales and marketing agency Chicago c/o Myriad Marketing P.O. Box 59594 Chicago, IL 60659-9594</p> <p>Heike Pfeiffer heike.pfeiffer@germany.travel Tel: +1 (0)773 539 6303</p>	<p>USA/LOS ANGELES</p> <p>GNTB sales and marketing agency Los Angeles c/o Myriad Marketing 6033 W. Century Blvd. #900 Los Angeles, CA 90045</p> <p>Christy Keller christy.keller@germany.travel Tel: +1 (0)310 649 7711</p>	

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<p>JAPAN</p> <p>GNTB foreign representative office Japan 7-5-56 Akasaka, Minato-Ku Tokyo 107-0052</p> <p>Akira Nishiyama akira.nishiyama@germany.travel Tel: +81 (0)335 860 380</p>	<p>CHINA/MAINLAND</p> <p>GNTB foreign representative office China Beijing, Landmark Tower II Unit 1417, 8 North Dongsanhuan Road Chaoyang District, 100004 Beijing</p> <p>Zhaohui Li zhaohui.li@germany.travel Tel: +86 (0)10 6590 6406</p>	<p>CHINA/HONG KONG</p> <p>GNTB sales and marketing agency China/Hong Kong c/o Deutsche Industrie und Handels- kammer HongKong & Südchina 3601 Tower One, Lippo Centre 89 Queensway Hong Kong</p> <p>Katrin Yeung katrin.yeung@germany.travel Tel: +852 (0)25 265 481</p>	<p>INDIA</p> <p>GNTB sales and marketing agency India c/o Airplus Travel Services Pvt. Ltd. No. C-18, Second Floor, C-Block Main Market Vasant Vihar, New Delhi-110057</p> <p>Romit Theophilus romit.theophilus@germany.travel Tel: +91 (0)11 4937 1001</p>
<p>AUSTRALIA</p> <p>GNTB sales and marketing agency Australia c/o Gate 7 Pty Ltd Level 1. 97 Rose Street Chippendale, NSW 2008 Australia</p> <p>Stefanie Eberhard stefanie.eberhard@germany.travel Tel: +612 (0)93 562 945</p>	<p>ARAB GULF STATES</p> <p>GNTB sales and marketing agency Arab Gulf States c/o Deutsch-Emiratische Industrie- und Handelskammer (AHK) Business Village, Building B, Office 618, Port Saeed, Deira P.O. Box 7480, Dubai, U.A.E.</p> <p>Sona Gün sona.guen@germany.travel Tel: +971 (0)44 470 100</p>	<p>SINGAPORE</p> <p>GNTB sales and marketing agency Singapore (ASEAN) c/o Deutsch-Singapurische Industrie- und Handelskammer 25 International Business Park #03-105 German Centre, Singapore 609916</p> <p>Hoy Yuen Chun hoyyuen.chun@germany.travel Tel: +65 (0)6433 5330</p>	

Structure of the German National Tourist Board

(as at June 2017)



Saxony-Anhalt, witches' dancing ground in the Harz mountains

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