



More and more international visitors are choosing to come to Germany. With more than 45 million overnight stays, 2004 was an extremely positive year for Germany's inbound tourism industry, even exceeding the record figures for EXPO Year 2000, when 42.6 million overnight stays were generated by international visitors. Even Germans – the world champions of travel – are choosing to holiday at home in increasing numbers. In 2004, Germany was once again by far the most popular holiday destination for Germans.

Two major global developments in 2004 underscore the potential for growth within our sector. The eastward expansion of the EU on 1 May 2004 not only enlarged the single European market but also extended the travel market of all the countries concerned. Potential growth markets in south-

east Asia such as China and Korea have long since outgrown their status as exotic newcomers, and are now making a significant contribution to the rise in tourism throughout the world.

Overall, 2004 was the best ever year for international tourism, with more than 760 million arrivals. Germany enjoyed a disproportionately high share of the revival and growth in international travel.

Within the "Health & Fitness Holidays" product line, the theme for the year was "The Fascination of Water – The Sea, Rivers and Lakes in Germany", which enabled us to draw the attention of visitors from all over the world to some of the loveliest scenery in Germany. "Music-Land Germany" was at the heart of our activities under the "City Breaks / Events" product line.

Nor has the German tourism industry been immune to football fever. As the marketing organisation for "Destination Germany", we have been working with the Organising Committee of FIFA World Cup Germany 2006™ at home and abroad to ensure that the football World Cup is an outstanding and perfectly organised sporting event that achieves its primary goal of bringing people from all over the world closer together.

Some things are beyond the control of people and politicians, and after the record-breaking high temperatures in summer 2003, 2004 proved to be something of a damp squib. Yet this merely served to highlight how diverse a holiday destination Germany really is, and the boom in city breaks was largely able to compensate for losses in the weather-sensitive segment.





The German tourism industry continued to be shaped by price-conscious consumer behaviour in 2004, as the booming low-fare carrier sector encouraged consumers to travel more. Despite early signs of consolidation in this sector, Germany has developed into the second strongest low-cost market in Europe.

The growth of the internet has already brought about some radical changes in the sales and marketing landscape. We have already set the standard for national tourist boards in the introduction and practical use of new media as global information sources.

We received a major endorsement last year when ten new companies from the tourism industry joined us, bringing the total number of GNTB partners to 57. This enabled us to further increase the positive synergy effects achieved through the public-private partnership.

Internally, there was a change on the board of directors as Günter Colonius stepped down as Commercial Director in summer 2004 after many years of dedicated work. The GNTB is deeply indebted to him, both for his forward-looking business planning and for the commercial direction he gave our organisation.

We also pressed ahead with our reorganisation in 2004, restructuring our international activities into six regional management offices. As a modern and efficient marketing organisation, we are now well placed to meet the future challenges facing Germany's tourism industry. This time last year, our assessment was cautiously optimistic, but our forecasts and our appraisal of the source markets have clearly been borne out. All the European source regions are showing healthy increases, important intercontinental markets such as the USA are recording high growth rates and returning to the record levels of

past years, and the hard work in future growth markets such as eastern Europe, China and the Arab Emirates is beginning to pay off. The GNTB can look back on a successful 2004. Provided that the economy remains stable, we can assume that tourism in Germany will continue to grow over the next few years and play its part in our country's economic prosperity.

Many people have contributed to our success, particularly the GNTB's employees throughout the world, but also partners from business, politics and the various associations. Our heartfelt thanks to them all.



Petra Hedorfer



Armin Brysch