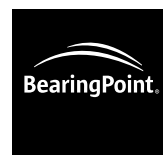


# VDR

*Business Travel Report Germany*

# 2007

*in co-operation with*



Management  
& Technology  
Consultants

The logo for VDR, consisting of the letters "VDR" in a bold, white, sans-serif font, positioned inside a dark blue rectangular box.

VERBAND DEUTSCHES REISEMANAGEMENT e.V.

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## ECONOMIC GROWTH MEANS MORE BUSINESS TRAVEL

This year's VDR Business Travel Report Germany demonstrates for the fifth time what immense importance mobility has for today's economy. With proven competence, VDR points out the key figures, developments and trends, answering for example the following questions: Which cities will be the top business destinations in 2008? Can suppliers hope to achieve growth and, if so, on what basis? In-depth analyses of these and other as yet unexplored issues can now be read in this study.

According to conservative estimates, half a million jobs in Germany owe their existence and sustainment to business travel.<sup>1</sup> And millions of holidaymakers profit from offers that are indirectly co-financed by the business travel market. The business travel market remains a reliable indicator of the economic situation

and at the same time exerts a stabilising effect. It does not fluctuate with the seasons and is largely immune to crises, as employee mobility is usually an important requirement for growth. Some of the following results show how this part of the value chain was managed during this past year.

As a consequence of economic recovery, the number of business trips has increased as anticipated. But the prices for many travel services have also gone up. By keeping control of costs, travel managers contribute to ensuring their companies' competitive standing. The right framework conditions are important in helping them to do so. VDR stands by all actors in German business and politics as a reliable partner and "think tank" for future themes in the field of business travel.

<sup>1</sup> This goes especially for the hotel and restaurant industry, transport companies, airports, travel agencies and other services involved in business travel. A proportion of the jobs for example in the automotive industry, IT and telecommunications can also be attributed to business travel.

**The key data:**

- ◆ In 2006 one in three employees took at least one business trip.
- ◆ 157.8 million business trips led to spending in the amount of
- ◆ 47.4 billion Euros - translated into
- ◆ 148 Euros per business traveller per day

+ 5%

+ 3%

+ 1%

2005:

6.9 million business travellers

150.7 million business trips

46.2 billion Euros

146 Euros

**And the Winner is...travel management**

It has been proven that larger companies that draw on the expertise of a travel manager are better able to cushion cost pressure in the business travel field. Small and medium-sized enterprises (SMEs) that ignore travel management, on the other hand, become the pawn of the suppliers and hence put their profitability at risk (Table 1, page 6 and Figure 12, page 13).

**Economic upswing in the Far East**

Of the five foreign cities that will boom as business travel destinations in the future, two are in China and one is in Russia - a crystallisation of the forecasts made in the last VDR Business Travel Report Germany. German business partner USA was also a frontrunner, especially with New York, but also with other destinations. In Germany, Berlin and Munich are ahead by a wide margin (Figures 14 and 15, pages 14 and 15).

**Take off in the morning, back that night**

Almost half of all business trips do not include an overnight stay, a trend that has been on the rise since 2003. During the same period, the share of business trips lasting six or more days has been halved. The average length of stay has dropped from 2.6 to 2.2 days (Figure 3, page 6).

**Hotel costs are down...**

The worldwide average cost of an overnight stay went down in 2006. German companies spent an average of 134 Euros, down 8 Euros from the prior year. Possible reasons include increasing competition amongst hotels and the price transparency afforded by Internet technologies (see page 9).

**...but transport costs are on the rise**

Transport is placing an increasing burden on the travel budget. Today, 54% of all business travel spend is for transport, a jump of no less than five percentage points in a single year. Rising costs have already provoked a reaction in road travel: three out of four cars newly licensed for company fleets are diesel vehicles (Figure 5, page 8).

**Virtual meetings on the agenda**

They're inexpensive and good for the climate: telephone and video conferences. 65% of companies already practice this method for bypassing travel. Is the public sector likewise setting a good example? Not at all: here the share is only around 40%. This is a clear signal to the political arena to take a closer look at this potential for savings (Figure 13, page 13).

**Flights still soaring**

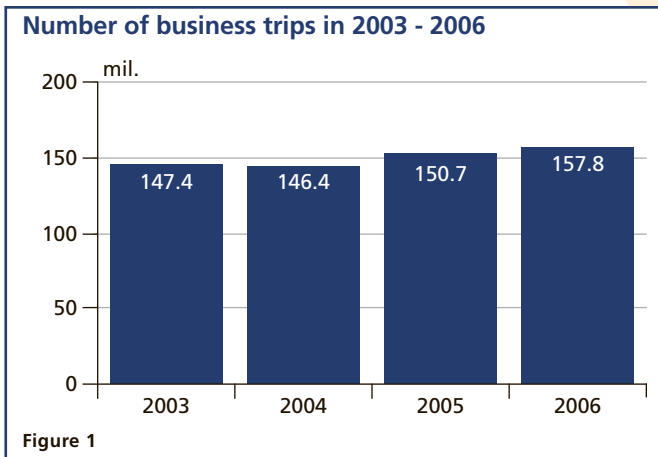
The demand for plane tickets for business trips will continue to grow more strongly than the use of rail or hired cars. No wonder, as many of the growth destinations for the German economy lie far beyond the range of road and rail. This is why placing a one-sided burden on air traffic would be poison for the labour market (Figures 15 and 16, pages 15 and 16).

## 2 BUSINESS TRAVEL: FACTS AND FIGURES

### Volume

The number of business trips in companies with ten or more employees went up 5% from 2005 to 2006.

Just as the economy and employment began to pull themselves up out of their low last year, today several indicators are showing an upward trend - with business travel activity out ahead. The number of staff members in businesses with ten or more employees has recovered somewhat (by + 1% to around 21 million), but has still not fully attained the 2004 figures.<sup>2</sup>

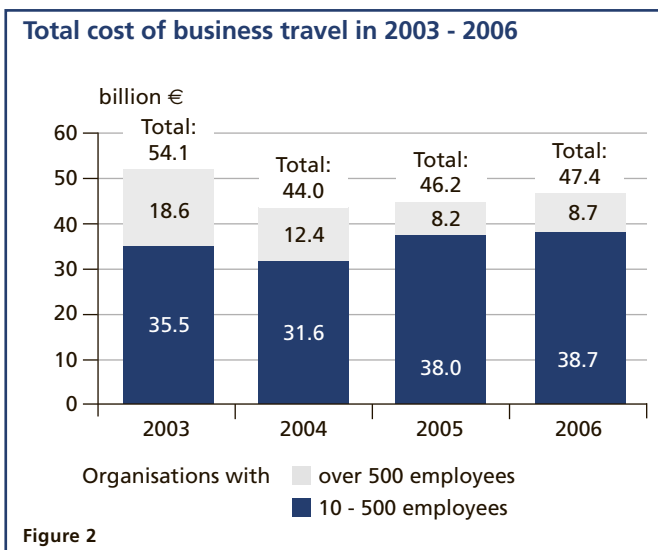


**“How many business trips were undertaken in your business / your organisation in 2006?”**

### Costs

The total costs for business trips went up 3% to 47.4 billion Euros. SMEs in particular continued to pay more than their fair share in 2006, but were able to put a stop to last year's cost explosion: they spent 4% more money for 5% more trips.

While an increase of 3% - 5% in flight prices and 1% - 5% for hotels was expected worldwide in 2006, it was anticipated that increases in Germany would remain below the European average.<sup>3</sup> The results realised in 2006 demonstrate that cost control measures were successful in many cases.



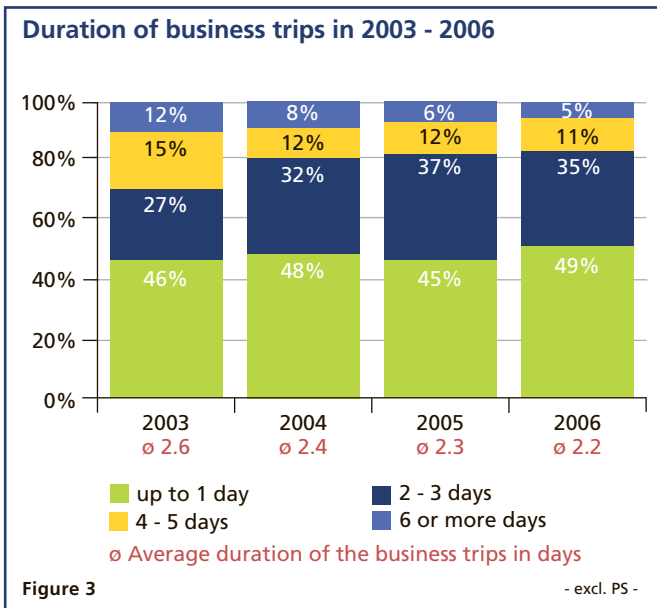
**“How high were the total business trip expenses in 2006?”**

Note: Any journey undertaken for purposes of business that is recorded on the basis of expense reports counts in this study as a business trip. The duration, purpose, distance and destination of the journey and the professional status of the travellers are insignificant here. As soon as expenditures are charged to the company as business travel expenses, they are counted in these figures. For further definitions of the terms used here, please see the VDR Business Travel Reports from 2003 - 2006.

<sup>2</sup> See notes on methodology at: [www.geschaeftrsreiseanalyse.de](http://www.geschaeftrsreiseanalyse.de)

<sup>3</sup> American Express Travel Forecast 2006.

“How long do business trips last?”



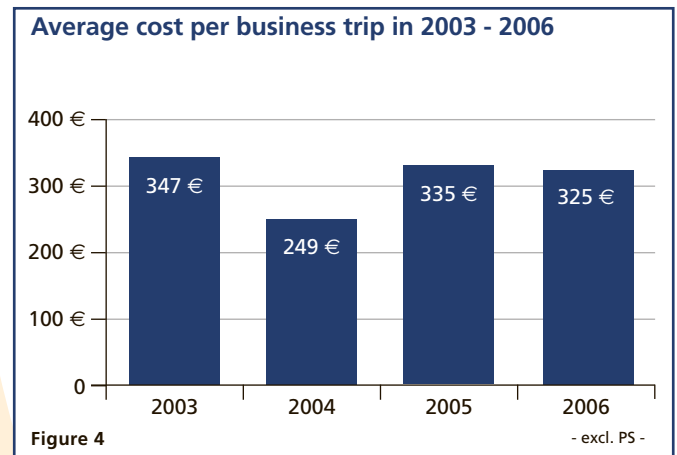
Duration

The trend to shorter business trips is continuing. In 2006 a business trip lasted an average of only 2.2 days. The share of journeys lasting a maximum of three days was up to 84%. Public sector (PS) trips are traditionally short, and have likewise grown even shorter. In 2006 the number of public sector trips without overnight stay was 70% - an increase of three percentage points compared to 2003.<sup>4</sup>

3 STRUCTURE OF BUSINESS TRAVEL COSTS

Average cost of business travel

“What is the average cost of a business trip?”



“What did companies spend on average for business travel?”  
 “What influence does travel management have on travel spend?”

Average business travel spend from 2005 - 2006

Companies with	Average business travel costs		Change...		Ratio of companies with travel managers in 2006
	2005	2006	in average business travel costs	in average business travel volume	
10 - 250 employees	€ 114,000	€ 119,000	+ 4%	+ 4%	7%
over 251 employees	€ 1,148,000	€ 1,088,000	- 5%	+ 9%	36%

Table 1

- excl. PS -

<sup>4</sup>VDR Business Travel Report Germany 2004, Chapter 5 “Business travel in the public sector”.

SMEs had to face slightly higher cost increases in 2006 than the market average, but on the whole their situation has improved. Those who rely on travel management are ahead of the game, because when rising travel volume is handled professionally, savings potentials can be tapped (Table 1).

The average expenditures per business trip dropped by 10 Euros. This can be attributed to the following factors:

- ◆ another drop in the average duration of a business trip
- ◆ improved awareness of options for cost control
- ◆ new offerings and tools for cost control, especially for small and medium-sized enterprises
- ◆ systematic utilisation of the growing range of offers

A business traveller spent an average of 148 Euros per day in 2006 (2005: 146 Euros), over twice as much as a holidaymaker.

#### A comparison between business travel and holiday travel<sup>5</sup>: total costs and daily expenditures in 2002 - 2006

Key figure		Business Travel	Holiday Travel
Total costs per year	2006	47.4 bn. €	53.9 bn. €
	2005	46.2 bn. €	53.3 bn. €
	2004	44.0 bn. €	53.1 bn. €
	2003	54.1 bn. €	52.1 bn. €
	2002	48.7 bn. €	51.6 bn. €
Daily expenditure per person per day	2006	148 €	66 €
	2005	146 €	67 €
	2004	104 €	63 €
	2003	133 €	62 €
	2002	102 €	61 €

Table 2

#### Cost areas

Today, 54% of all business travel expenditures are for transport, a climb of no less than five percentage points in a single year. This increase can be attributed primarily to the steep jump in kerosene and petrol prices. In reaction, 74.4% of all new fleet cars licensed in January 2007 were diesel-powered.<sup>6</sup>

The costs for overnight stays have remained proportionate to those in 2005 - one in four Euros of travel spend goes toward hotels. Costs for meals went down, however.

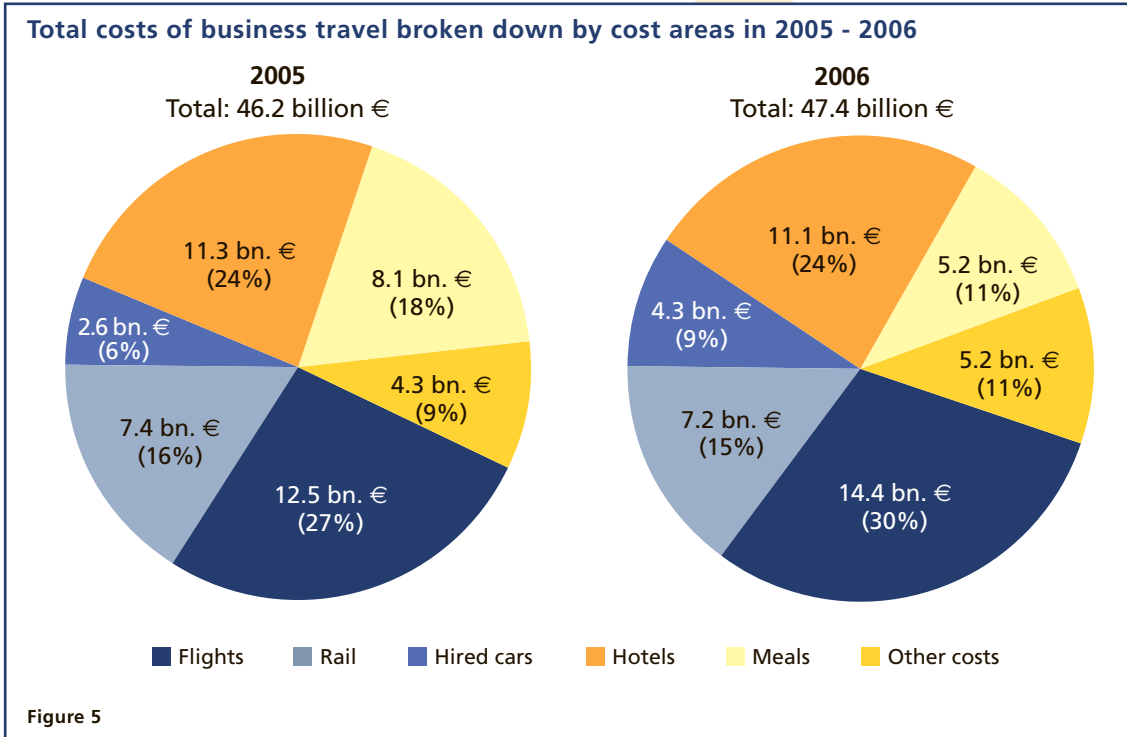
Expenditures for plane tickets and hired cars increased overall. The larger number of one-day trips contributes to a reduction in the total costs for overnight stays and thus to a proportionate increase in transport costs.

<sup>5</sup> Own calculations based on F.U.R, Hamburg/Kiel: Reiseanalysen 2003-2007.

<sup>6</sup> Business trip expenditure per person per day: only businesses, excluding public sector. Holiday trips lasting 5 days or longer.

<sup>7</sup> Dataforce 2007.

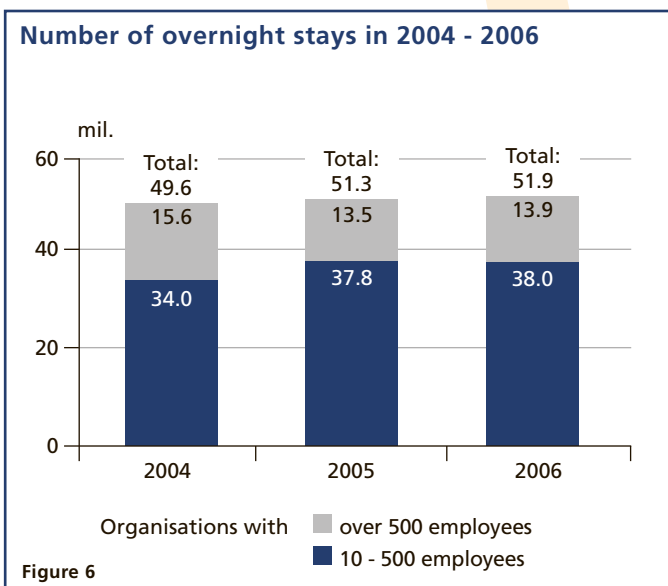
“What were the totals for the different cost areas in your company / your organisation?”



The total costs of mobility are strongly influenced by developments on the transport market. There is significant latent savings potential in fleet management, for example. According to a current representative survey conducted by Dataforce, 60% of fleet managers could not provide an exact figure for the total costs of their vehicle fleet.<sup>7</sup>

## 4 OVERNIGHT STAYS

Development of overnight stays and turnover



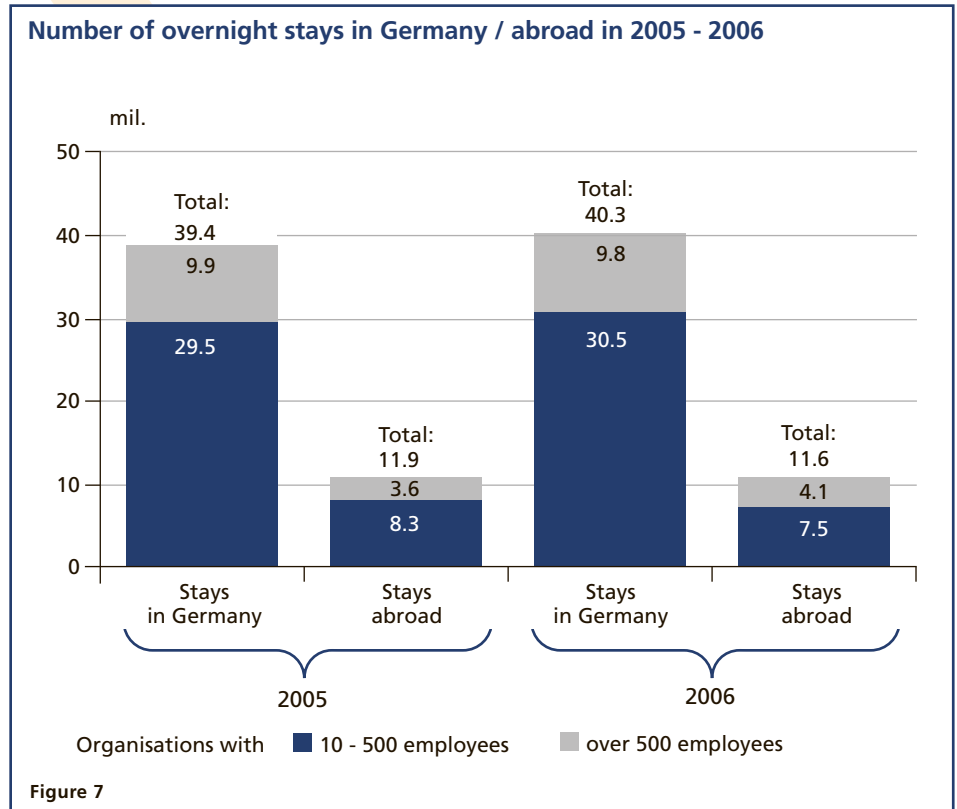
“How many overnight stays did the business trips taken for your company / your organisation include?”

In 2006, business travellers for German organisations accounted for 51.9 million overnight stays. Larger companies with more than 500 employees contributed a greater share (+3%) to the overall growth of 1%.

<sup>7</sup>Dataforce, April 2007. The VDR Business Travel Report Germany 2004 placed the annual figure at 26.6 billion Euros.

“How is the number of overnight stays distributed between domestic and foreign accommodations?”<sup>8</sup>

“How much turnover does this generate?”



German business travellers spent a total of 40.3 million room nights in domestic accommodations in 2006, a slight increase over last year's total. Larger organisations travelled more abroad, while smaller ones increasingly stayed within Germany.

The turnover of 8.6 billion Euros remained stable, corresponding to about half of the overall turnover earned by classic hotel establishments.<sup>9</sup> About 2.5 billion Euros were spent on foreign hotel stays. The average worldwide cost of an overnight stay, taking into account all types and categories of accommodations, went down 8 Euros in 2006 to 134 Euros.<sup>10</sup>

**Total turnover from overnight stays (room nights) in Germany / abroad in 2005 - 2006**

Turnover	2005	2006
Germany	8.6 bn. €	8.6 bn. €
abroad	2.7 bn. €	2.5 bn. €

Table 3

Can hotels look forward to welcoming more business guests this coming year? 70% of the companies surveyed anticipate the same number of overnight stays, but one in five expects to see some growth. The number of hotel stays is thus set to increase further in 2008.

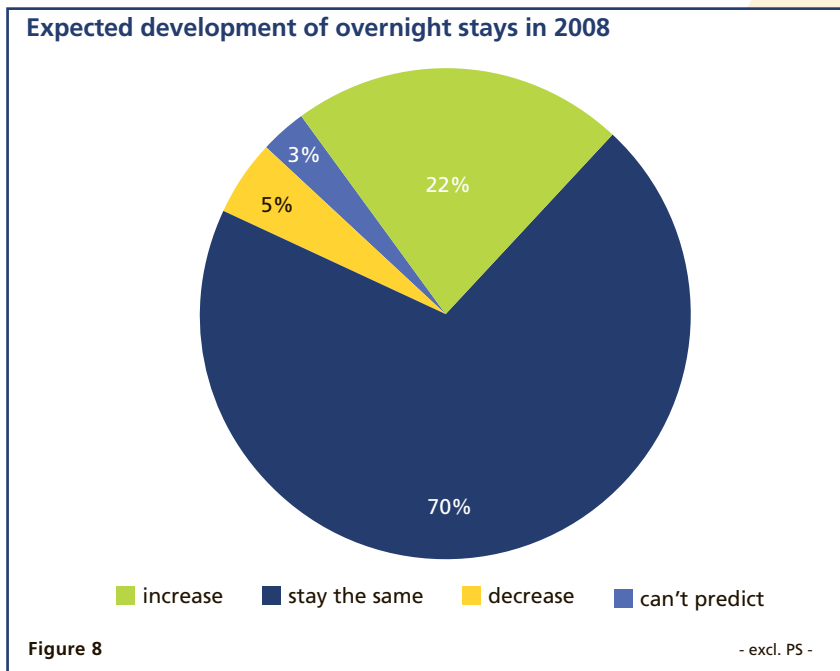
<sup>8</sup> Overnight stays = room nights.

<sup>9</sup> Cf. Hotelverband Deutschland (IHA): Hotelmarkt Deutschland 2007.

<sup>10</sup> Wherever data on the number of overnight stays as well as the costs could be provided, this was used for the calculations. A calculation based on total overnight stays and turnover as well as a forecast of differentiated average prices between Germany and abroad is not possible.



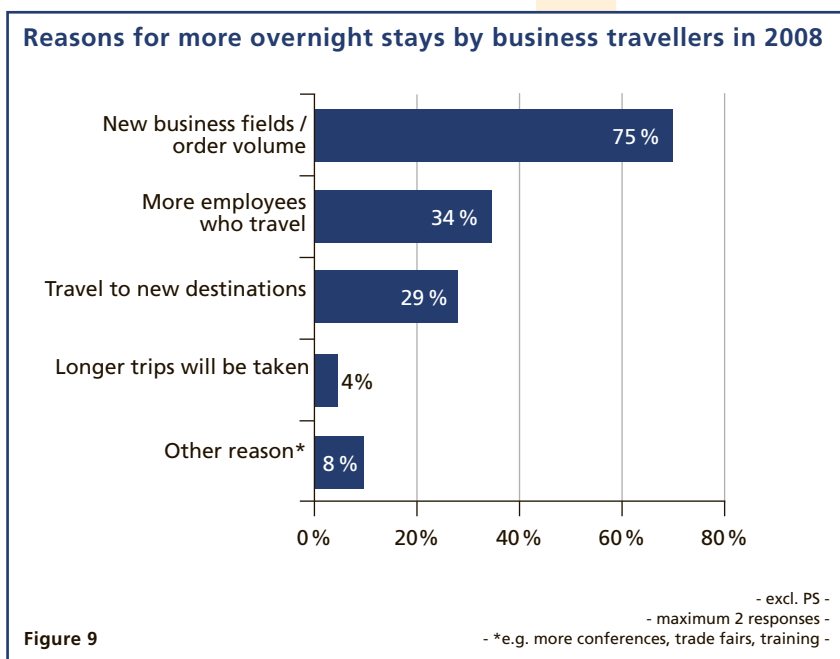
## Company plans for 2008



**“How will the number of overnight stays by business travellers change in your company in 2008 compared to 2007?”**

Business travellers in companies of all sizes will stay away overnight more frequently in 2008. Above-average growth can be expected in businesses with more than 1,500 employees: 38% anticipate more overnight stays. Most stable are the SMEs: 82% expect their travellers to stay overnight to the same extent as the previous year. One in every ten small companies anticipates an increase.

**“What are the main reasons why your company expects more overnight stays in the coming year?”**



The expected increase in the number of hotel stays in the coming year can be attributed only in part to longer business trips. New business fields and a growing order volume are the main reasons cited by three out of four businesses. One in three companies is thus sending more employees on business trips - notably SMEs (50% selected this response). Larger companies with over 1,500 employees are in particular setting off for new destinations (36%). Other reasons mentioned were: quality assurance that requires a longer stay as well as - especially in companies with more than 500 employees - an increase in training courses, trade fairs and conferences.

As shown in Figure 8, 5% of the companies surveyed plan on fewer overnight stays. 41% of these give stricter cost control as reason. Every third company has fewer employees who travel. One in five remarked that business is not going so well (18%, no illustration).

## 5 BUSINESS TRAVEL AND TRAVEL MANAGEMENT

### Areas of responsibility

“Which of the following tasks fall under your area of responsibility?”



At first glance, the field of travel expense reimbursement seems to show astounding growth. This may be an indication of what is in some cases the operational or administrative positioning of travel management. Particularly in the case of small and medium-sized companies with 10 - 500 employees, 83% of this area is allocated to travel management. In large companies by contrast, it is to be expected that settlement of travel expenses will be outsourced, as the responsibility here is more management-oriented.

While last year the area of event management was increasingly being entrusted to a travel manager, a reverse trend can be observed in 2007. This shift possibly indicates that companies are aiming at a “consolidated specialisation” in this field: an event manager has been placed at the side of the travel manager. Training and conference needs are experiencing a positive trend as a result of overall

economic growth, with an above-average increase in meetings and congresses expected in 2007 - creating new jobs.<sup>11</sup> As one might expect, in the SMEs only one person is responsible for both areas. 67% of travel managers here are also in charge of events, compared to 40% in companies with over 1,500 employees.

Travel safety remains one of the top three areas that increasingly belongs to the field of travel management. 37% of travel managers are involved today in “insurance / safety”. In addition, 9% of the travel managers surveyed are still responsible for the three sub-areas of settlement of expenses, event management and insurance.

<sup>11</sup> Cf. Meeting Professionals International / American Express: Future Watch 2007, A Comparative Outlook on the Global Business of Meetings.

“Is there a special event policy at your company?”

Deployment of an event policy in 2007

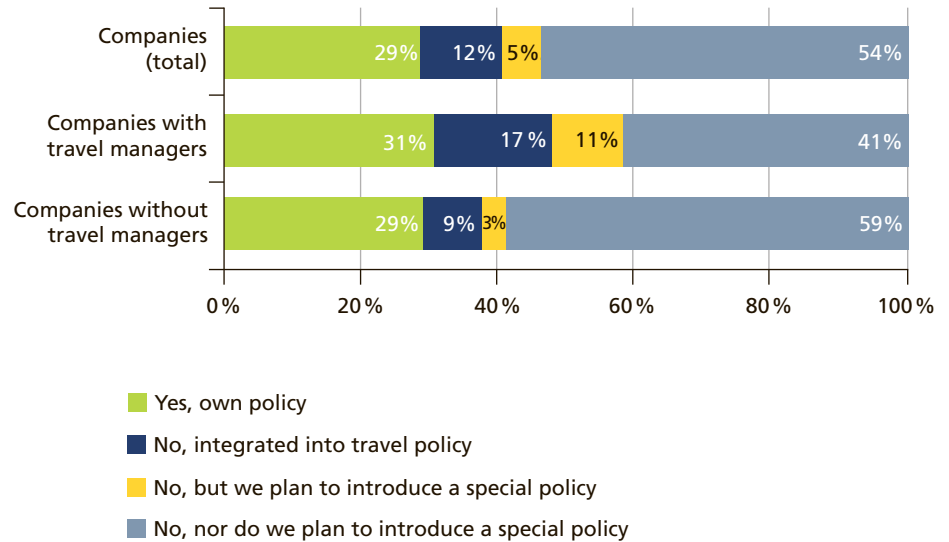


Figure 11

- excl. PS -

For the first time this year, VDR asked companies if they had a special event policy. Often neglected in the past, today almost one in two companies (46%) has recognised the cost-reduction potential of this tool. One in three businesses has its own policy, 12% have integrated it into their travel policy, and a further 5% plan to introduce an event policy soon. In view of the fact that 35% of overall business travel spend goes toward event-related business trips,<sup>12</sup> this is an important signal.

Incidentally: public-sector organisations are behaving similarly to private businesses in this respect. Additional

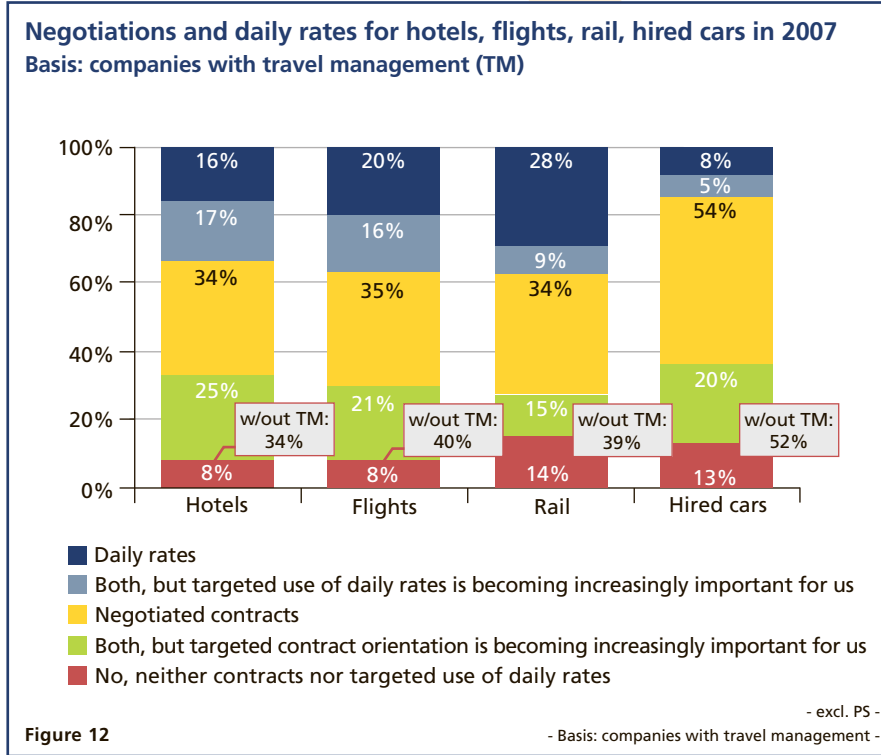
cost-saving measures already mentioned last year were the option of bundling or transferring events to the company premises or somewhere close-by, as well as centralising the bookings.

The question as to whether special event guidelines exist or are in planning is answered affirmatively much more often by companies with travel managers than by those without. Every third company with travel managers employs an event policy; another third has integrated it into the travel policy or plans to introduce new event guidelines (Figure 11).

<sup>12</sup> VDR Business Travel Report Germany 2006, Chapter 3.1.3 “Motives for business trips”.

## Negotiations and daily rates

**“Do you or your travel agency negotiate contracts for company rates with suppliers (hotel, air, rail, hired car) or do you (also) take advantage of current daily rates?”**

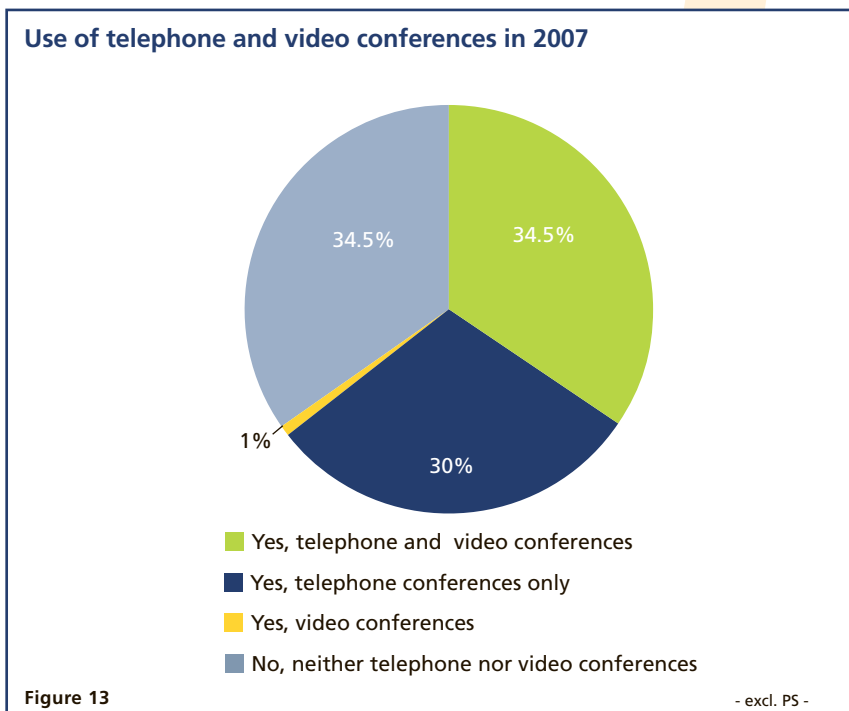


The answers to this core question show quite clearly that companies without travel management waste money. The share of businesses that neither negotiate contracts nor take targeted advantage of daily rates is extremely high. All of them are in effect putting themselves at the mercy of the suppliers' pricing. The situation looks quite different in companies where travel managers are at work: in this case, nine out of ten opt for one or the other purchasing option.

A preference for contracts predominates in all areas other than rail travel. Rail trips are booked more often than other means of transport with a view to the best daily rates. This is a positive signal for the ability to combine company discount programs, the BahnCard and special daily terms when booking rail travel online.

Also of interest:

**Does your company use telephone or video conferences?**



Unlike with leisure travel, business destinations cannot be substituted. Another decisive difference is that business trips can sometimes be eliminated if similar results can be achieved through alternate means. In other words: growth in the business travel sector is not a corporate goal per se. A travel manager can conduct intelligent comparative analyses, ultimately contributing to reducing emissions by exploring “virtual mobility” options such as telephone and video conferences, without the company's operating results suffering a negative impact. One year before the issue of climate protection was on everyone's lips, VDR was already taking up topics such as “Kyoto and corporate mobility” and “Travel management strategies for avoiding unnecessary trips”.

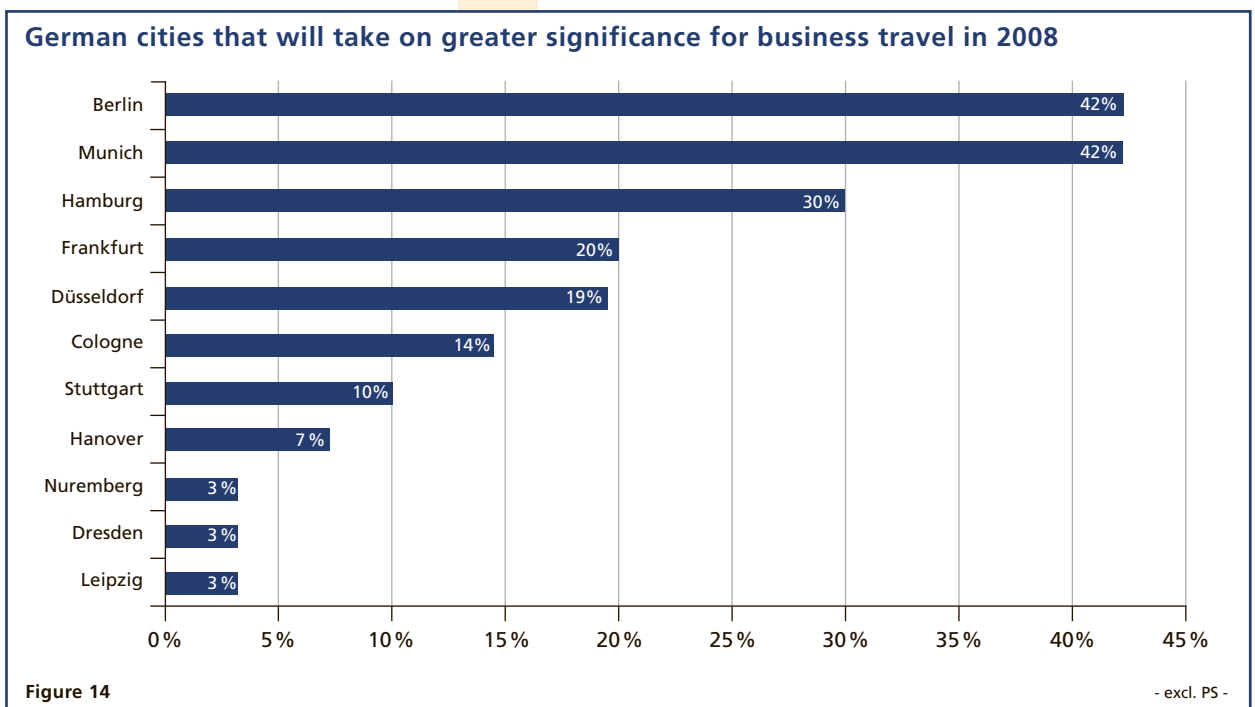
Telephone and/or video conferences are already utilised by two thirds of companies. A closer analysis reveals that the inclination to use these alternatives can be related to a company's travel structure. Where the ratio of foreign travel is at least 20%, the tendency to save costs - as well as CO<sub>2</sub> emissions - by taking advantage of alternatives to business trips is greater than in companies with more domestic travel. But travelling to meet new customers will hardly be replaced anytime soon as a guarantee for growth. This is also demonstrated by the reasons given for predicting more overnight stays in 2008 (see Figure 9). For face-to-face meetings that can be avoided, though, there are acceptable alternative forms of keeping in touch. This strategy especially makes sense for meetings that are classified as internal, regular or international.

## 6 OUTLOOK <sup>13</sup>

### Trend cities for business trips

The annual survey conducted by VDR has confirmed over the years that the domestic travel industry profits the most from work-related travel. Direct industry turnover from business travel in 2005 was around 36.6 billion Euros.<sup>14</sup> But which cities can look forward to growth prompted by business travellers next year - both in Germany and abroad?

**"Which German cities will take on greater significance for business trips in your company in 2008?"**



**Exemplification:** 50% of the companies surveyed indicated that at least one German city would take on greater significance for business travel in 2008. 42% of these companies named either Berlin or Munich.

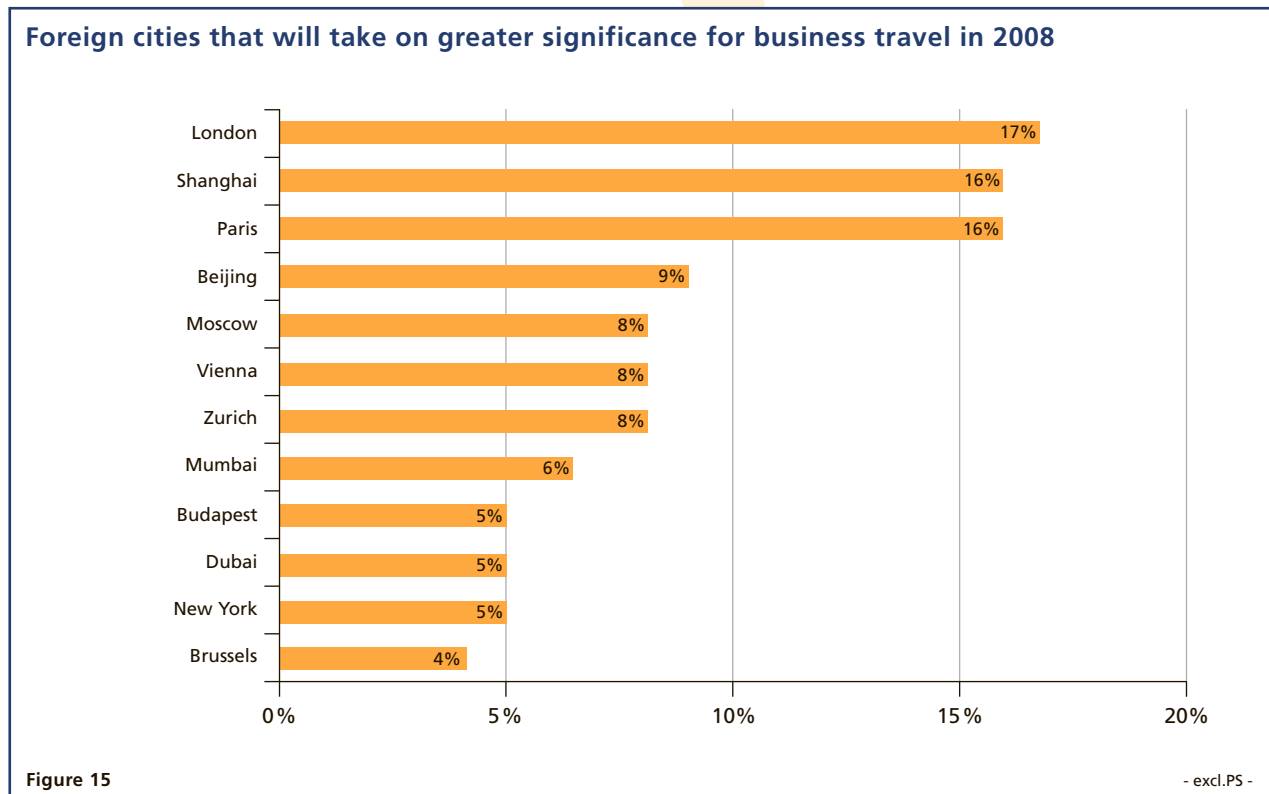
<sup>13</sup> For expectations regarding hotel stays, see Chapter 4.

<sup>14</sup> According to a survey conducted by TNS Infratest on behalf of the German National Tourist Board and the German Convention Bureau, this figure rose to 38.5 billion Euros in 2006. This was based on business trips with overnight stay amongst German residents aged 18 and older, including private expenditures. Source: Press conference on Germany as conference and convention destination, Frankfurt/Main, 17 April 2007.

Berlin and Munich are increasingly attractive business destinations. As a host for conferences, congresses and trade fairs, in demand not only in Germany but also abroad, Germany's capital is successfully holding its own with other international meeting destinations.<sup>15</sup> Lobby work and political contacts are additional reasons why people come here.

41% of the companies surveyed indicated that they would be sending employees more frequently to at least one foreign city in 2008. London is in the lead here, but three of the first five growth cities for business travel are in the Far East, two of them in China. Four out of one hundred companies in Germany have plans to visit Beijing.<sup>16</sup>

**“Which foreign cities will take on greater significance for business trips in your company in 2008?”**



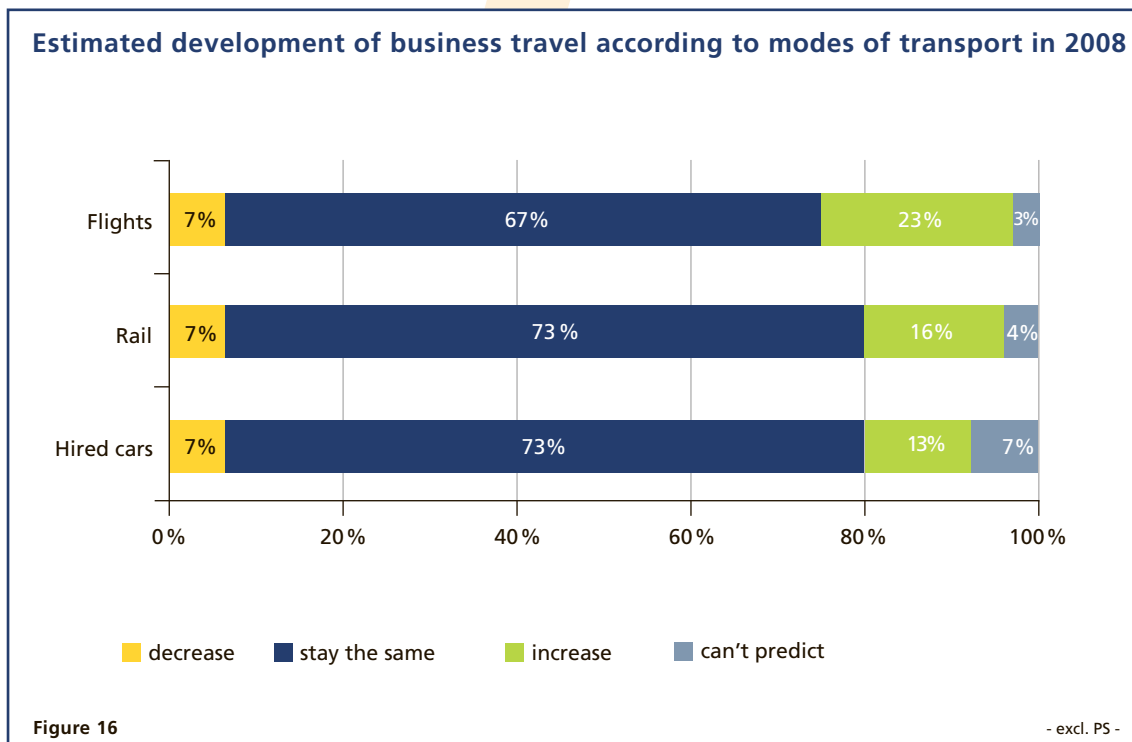
<sup>15</sup> Cf. also: European Institute for the Conference Industry (EITW) on behalf of EVVC, GCB, DZT: The future of the conference and convention market in Germany - results of a survey of event organisers and experts, press conference, Frankfurt/Main, 17 April 2007.

<sup>16</sup> While respondents were asked about destination countries last year, only cities could be given as response in this year's survey. Additional responses for the top business travel country USA were distributed amongst 15 cities, not shown here.

## Modal split: Changes and their reasons

The willingness of businesses to reveal their plans for the coming year has once again increased. In 2005, one in five companies was not in a position to forecast the development of their future travel picture. In 2006 this number was cut in half, and currently the basic mood is quite confident, with more companies able to make detailed statements on their future plans. The next question examines the expected developments according to the "modal split", i.e. divided by modes of transport.<sup>17</sup>

**"How will the trips taken by your employees in 2008 be distributed amongst the various modes of transport, compared to 2007?"**



Nine in ten companies plan the same number or more business trips in the year 2008. Every fourth company will be focusing more on air travel; new fields of business and a positive order volume are cited most frequently as the reasons (78%). More employees who travel is the second main reason companies name for greater travel volume using all modes of transport. New business destinations will be added by every fourth company that predicts growth in travel.

The mode of transport with the lowest prospects for booking increases, i.e. where there is the least certainty of future growth, is the hired car field. Where hired cars are not needed, company cars are given as the reason, but also the aeroplane - even before rail travel. And only a few of those who fly less today do so for ecological reasons. The decision in favour of rail travel is likewise rarely an "environmental" one according to the respondents. Direct cost savings are still the most important factor when companies reroute or reduce travel volume.

<sup>17</sup> Modal Split: a traffic / transport term which describes the percentage of travellers using a particular type of transportation, a consequence of people's mobility behaviour and the economic decisions of enterprises on the one hand and on the other of what transport is available, cf. [www.wikipedia.org](http://www.wikipedia.org)

## RESEARCH TEAM

**VDR – The Business Travel Association of Germany**, the publisher of this report, has defined the basic structure of the analysis and selected topical questions in consultation with its members. The consulting company **BearingPoint** is responsible for the specialised analytical work, reporting and organisation of the study project. **United Research AG** is responsible for the field work and the scientific evaluation of the primary data gathered in the survey.

## VDR – THE BUSINESS TRAVEL ASSOCIATION OF GERMANY

VDR – The Business Travel Association of Germany represents the interests of German business with respect to all aspects of business travel management. The aim is to ensure that worldwide business travel is efficient, economical, safe and unimpeded. With some 500 member companies, VDR represents a total business travel turnover of more than ten billion Euros per year.

## METHODOLOGY

The statistical universe for the VDR Business Travel Report was constituted by all businesses that have their principal place of business in Germany - including those that have operations abroad - and organisations in the public sector with ten or more employees. Due to the fundamental differences between the two sectors, the results from private businesses and those from the public sector are for the most part presented separately. The corresponding data basis is made clear in the respective passages:

- ◆ When reference is made to businesses or companies, this excludes the public sector (- excl. PS -).
- ◆ When reference is made to organisations, this means both businesses and institutions in the public sector.

Further methodological information on the statistical universe and survey methodology can be found at:  
[www.geschaeftsreiseanalyse.de](http://www.geschaeftsreiseanalyse.de)



## IMPRINT

This study in German and English, together with Management Summaries in German and English for the years 2003 - 2006, are available free of charge at: [www.geschaeftsreiseanalyse.de](http://www.geschaeftsreiseanalyse.de)

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Where the male pronoun form is used in the text, this was done for the sake of simplicity. This is meant to signify both men and women.

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