

Stay longer

Supported by:



Federal Ministry
for Economic Affairs
and Climate Action

on the basis of a decision
by the German Bundestag

Germany
The travel destination



www.germany.travel

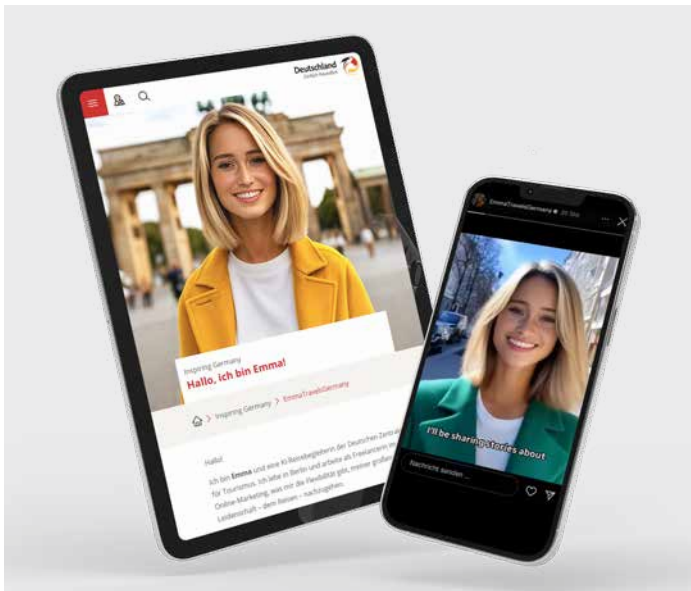
2024 INBOUND TOURISM

Digital | Sustainable | Future-focused

ANNUAL REPORT

32

**GNTB international network
boosts knowledge sharing
and business contacts**
Innovative
event formats



26

**Focus on digitalisation
and sustainability**
Implementing artificial intelligence
in day-to-day work

38

**Global marketing
campaigns**
Focus on cultural
tourism and
nature tourism





50

**High reach for
corporate communications
across all channels**
Successful
B2B communications

04 Forewords

- 04 · A message from the Executive Board
- 06 · A message from the Federal Government Coordinator for Tourism
- 08 · A message from the Board of Directors

10 Destination Germany in the international market

- 12 · Global tourism trends –
greater competition between destinations

20 The GNTB's international activities

- 22 · Focus on digitalisation and sustainability as key topics for the future
- 32 · International GNTB network boosts knowledge sharing and business contacts
- 38 · Global marketing centred on cultural tourism, nature tourism and sustainability
- 50 · High reach for corporate communications across all channels
- 52 · Social media marketing: active B2C targeting and use of AI
- 54 · International markets
- 81 · Global recognition for the GNTB's work

82 Outlook for inbound tourism to Germany

- 84 · The perspective of the parties on the German Bundestag's Tourism Committee
- 88 · Outlook for Destination Germany in the international market in 2025
- 90 · Culture and nature the focus of the GNTB's global marketing in 2025
- 92 · Spotlight on German cultural history – key themes for 2025
- 94 · Outlook from the perspective of the regional tourism organisations

98 Internal processes in 2024 and organisational structure in 2025

- 100 · Administration
- 103 · GNTB members, sponsors and partners
- 106 · Members of the GNTB Board of Directors
- 109 · Members of the GNTB Advisory Board
- 110 · The GNTB International Marketing Committee
- 112 · GNTB contacts in the international markets

114 Structure of the German National Tourist Board

115 Production credits

GERMANY CONTINUED TO PLAY IN THE CHAMPIONS LEAGUE IN THE INTERNATIONAL MARKET IN 2024.



Petra Hedorfer
Chief Executive Officer

Dear reader,

Inbound tourism to Germany enjoyed a good 2024, with a year-on-year rise in international overnight stays of 5.4 per cent to 85.3 million.

Germany continued to play in the Champions League in the international market in 2024. When it comes to global travel by Europeans, Germany is the number one choice for cultural travel and city breaks, and takes second place for nature tourism. It is also the world's leading business travel destination. Inbound tourism thus provided a lasting boost to Germany's image as a cosmopolitan and attractive location, and made a significant contribution to our country's economic performance.

In 2024, we once again rose to the key challenges that we faced in international tourism. In terms of our day-to-day work, this saw us engage in ongoing, in-depth collaboration with our partners in the global travel industry, come up with innovative responses to technological progress on the digital front, and strengthen the Destination Germany brand with regard to sustainability and inclusion.

Accordingly, we started 2025 with a good deal of optimism, as did many experts in international tourism. UN Tourism, for example, forecast further growth in global arrivals of 3 to 5 per cent. We hope to play an active role in shaping this trend. However, escalating global trade disputes – with affected countries engaged in a tit-for-tat of punitive tariffs – are impacting on the travel industry's growth forecasts and on consumer behaviour.

Currently, at the end of April, it is not possible to anticipate how these headwinds might develop over the course of the year. Nevertheless, past experience tells us that global tourism is resilient. People's desire for recreation and for experiencing other cultures will ultimately outweigh any negative impact from the current situations, as will the critical importance of business travel in maintaining viable economic relationships.

The diversity of our current source markets presents opportunities for Germany as a travel destination. And longer term, growth is expected to be even stronger from the Asia-Pacific region.

In line with a visitor economy strategy, a cosmopolitan, forward-looking Germany is synonymous with authenticity, sustainability and innovation, making the country an attractive proposition for international visitors, investors and highly skilled workers. Now more than ever, the focus must be on more than just revenue; it must be on tourism as a force that can unite people and bring stability, peace and security.

Through our innovative marketing of culture and the arts, and thanks to our exceptional natural landscapes, we are able to attract new customers to Germany and entice past visitors back.

Digitalisation is providing the crucial momentum here. Digital tools and AI-assisted applications – from inspiration and booking to digital services such as mobile payments and virtual guides – are the norm, especially



Benedikt Esser
Interim member of the Executive Board

in key growth markets. To remain competitive as a travel destination in the international market, we must align our digital strategy, our tourism offerings and our infrastructure with this global rise in demand.

The GNTB's Open Data/Knowledge Graph project provides the technological infrastructure for the development and implementation of AI-assisted services, and ensures that small and medium-sized market players can benefit from the potential for innovation and growth in a highly digital marketplace.

AI-assisted applications have long been an integral element of our operational processes, from business intelligence to marketing. The introduction of Emma, an AI-generated travel companion, in our customer communications on social media was a first in Germany, and it has been well received internationally.

We would like to take this opportunity to thank all employees at the head office in Frankfurt and at the foreign representative offices for driving the GNTB's work forward with their enthusiasm, commitment and passion for innovation.

2024 was also a year of difficult decisions for the GNTB. In view of rising personnel and energy costs, as well as other factors, we had to realign the organisation to provide it with a reliable basis for planning in the medium term. Accordingly, the GNTB's Board of Directors decided to close six offices.

Following the German parliamentary elections, this year will likely see changes to the business and regulatory environment for Germany's tourism industry.

We would like to thank everyone who supported and made a constructive contribution to our work over the last legislative period, particularly the members of the German Bundestag's Tourism Committee, our partners in the Federal Ministry for Economic Affairs and Climate Action, and Member of the German Parliament Dieter Janecek in his role as Federal Government Coordinator for Tourism.

What is certain is that, going forward, Germany's inbound tourism industry needs ideological consistency in, and financial support from, the political arena if it is to unlock further growth potential, respond to the exponential rise in demands resulting from digitalisation and effectively support the many SMEs in this sector.

A strong image as a cosmopolitan and service-oriented travel destination can also increase our country's appeal as a location for inward investment and commerce. Between 2014 and 2024, the GNTB's financial support from the federal government rose by 42 per cent from €28.3 million to €40.6 million. Over the same period, travel expenditure by international visitors to Germany (including travel to get here) more than doubled from €34.5 billion to €77.5 billion. A clear return on investment.

The support for the GNTB expressed in the coalition agreement spurs us on to continue pursuing our integrated and competitive approach to positioning Destination Germany in the international market. We look forward to working with the representatives in parliament and the relevant ministries over the coming legislative period.

The GNTB Board of Directors and its President, Brigitte Goertz-Meissner, and Vice-Presidents Michaela Kaniber, Bavarian Minister of State for Food, Agriculture, Forestry and Tourism, Reinhard Meyer, President of the German Tourism Association and Guido Zöllick, President of the German Hotel and Restaurant Association, and the GNTB Marketing Committee and Advisory Board have been unwavering in their support and appreciation for our work. They are a constant source of motivation and we cannot thank them enough for this.

Petra Hedorfer

Benedikt Esser



Dieter Janecek
Federal Government
Coordinator for Tourism

Dear reader,

International tourism is on course for growth. UN Tourism recorded 1.4 billion international arrivals in 2024, and it could be more than two billion by 2030. Travel is an important economic factor, as it creates jobs and adds value in the destinations. But the rise in travel is also generating emissions that are harming the planet, overtourism is having a negative impact and there is growing concern that local communities are not benefiting.

We believe we have a responsibility to ensure that Germany is sustainable, climate-friendly, innovative and socially fair, both as a source market for tourism and as a destination. In this regard, we are guided by the UN's 2030 Agenda for Sustainable Development and the sustainable development goals (SDGs).

Working with key players from the federal ministries, the federal states, the industry and the research community, we have agreed ambitious targets and launched many initiatives as part of the ongoing national tourism strategy. The objective is to effectively position tourism

with regard to future needs in the areas of climate neutrality / environmental protection and nature conservation, job creation and job security, digitalisation and competitiveness. I would like to take this opportunity to express my thanks to the GNTB for all its work on the national Future of Tourism platform.

Inbound tourism is of great importance. On the one hand, it generates considerable added value in economic terms. The amount of money that international visitors are spending is rising faster than the number of overnight stays. This revenue primarily benefits small and medium-sized enterprises in the sector.

On the other, actively marketing Destination Germany worldwide creates close links between the international travel trade, the global online travel platforms and the tourism companies in Germany. Linked to this is the extensive sharing of knowledge.

Over the last year, the GNTB has once again gone to great lengths to fulfil these tasks. As an example of best

INBOUND TOURISM ADDS CONSIDERABLE ECONOMIC VALUE.

practice, I would like to mention the Digital Travel Knowledge Tour to China in May, which was initiated and organised by the GNTB. A delegation of senior decision-makers and technology experts from Germany's destinations, major cities and tourism service providers were joined by members of the German Bundestag's Tourism Committee, led by its deputy chair and Member of the German Parliament, Gülistan Yüksel, on a trip that provided invaluable insights into how the market thinks and works. We were able to see how consumer expectations are evolving in an increasingly digitalised world and what requirements this imposes on our service offering. The trip also presented opportunities to make new business contacts, which have already resulted in specific collaborations.

In addition to increasing the value created by inbound tourism, 2024 was about placing the need to protect the climate and the environment at the heart of tourism, and qualitative criteria for success formed part of this. Key technology projects that promote a democratic data culture and support AI-based business models

were given a boost in the digital strategy. The GNTB's marketing supported the small and medium-sized enterprises that directly and indirectly – in other sectors of the economy – benefit from tourism to Germany.

Inbound tourism to Germany experienced a very good 2024. The number of overnight stays rose sharply again, by 5.4 per cent, with tangible economic benefits for our country. Further significant progress was made with the environmental and digital transformation, in line with the targets of the federal government.

I would like to take this opportunity to thank the GNTB's Executive Board, its staff in Germany and abroad, and its partners, members and committees for all their hard work.



Dieter Janecek



**# THE GNTB IS DRIVING
THE FUTURE OF
INBOUND TOURISM
TO GERMANY THROUGH
INNOVATION.**

Brigitte Goertz-Meissner
President of the Board of Directors of the
German National Tourist Board

Dear reader,

In this annual report for 2024, the GNTB looks back over a year that was once again defined by major challenges for global tourism. Despite this, the GNTB was able to maintain interest in tourism to Germany, inspire new customers and further enhance Germany's image as a sustainable, high-quality travel destination.

The figures for overnight stays by international visitors have almost reached the record pre-pandemic levels of 2019, while economic added value has seen even steeper growth. An increase of 5.4 per cent is a powerful reminder of tourism's strong performance in the German economy.

The Board of Directors fully supported the strategic approach of the GNTB's Executive Board.

In this context, driving the digital transformation forward as the key to the future of global travel was and remains a vital task. The focus here was on implementing artificial intelligence applications. A flagship project in 2024 was the development and launch of Emma, an

Vice Presidents of the GNTB Board of Directors



Michaela Kaniber
Bavarian Minister of State
for Food, Agriculture,
Forestry and Tourism



Reinhard Meyer
President of the German
Tourism Association (DTV)



Guido Zöllick
President of the German
Hotel and Restaurant
Association
(DEHOGA)

Honorary Presidents of the GNTB Board of Directors



Klaus Laepple
President of the Federal
Association of the German
Tourism Industry (ret.)
Honorary President of the
German Travel Association



Ernst Fischer
President of DEHOGA (ret.)

AI-assisted travel companion. The positive feedback from the international markets clearly shows that these types of project can provide a decisive competitive edge. But the project also underlined how far Germany still has to travel on the path to digital transformation.

The GNTB resolutely pursued its sustainability strategy in 2024, and the membership of the Global Sustainable Tourism Council (GSTC) represented a milestone in terms of networking and sharing knowledge. Internally, the GNTB also implemented the EU Eco-Management and Audit Scheme (EMAS). We believe that the GNTB and Destination Germany are well placed to compete in the international market.

The innovative global campaigns and market-specific initiatives have been very well received. I would like to congratulate the Executive Board and the entire GNTB team at the head office in Frankfurt, the foreign representative offices, and the sales and marketing agencies for this excellent set of results.

I would like to thank the GNTB's partners in the political arena as well, such as the Tourism Committee of the German Bundestag, a champion of ongoing financial support for the GNTB. We are also indebted to the Federal Ministry for Economic Affairs and Climate Action and to Member of the German Parliament Dieter Jan-
eck in his role as Federal Government Coordinator for Tourism.

This annual report is another notable reminder of how the GNTB is tackling its present-day tasks while using its powers of innovation to drive the future of tourism to Germany. We are confident that this will effectively support SMEs in Germany's tourism sector in the international market over the coming years, and thus further strengthen Germany as a centre of commerce and industry.

Brigitte Goertz-Meissner





DESTINATION GERMANY IN THE INTER- NATIONAL MARKET

As a destination, Germany belongs to the Champions League in the international market. When it comes to global travel by Europeans, Germany is the number one choice for cultural travel and city breaks, and in second place for nature tourism. It is also the world's leading business travel destination.

Destination Germany participated in global growth in 2024, with overnight stays approaching pre-pandemic levels and economic added value hitting a record high.

A distinctive brand profile, progress with digital transformation and the positioning as a sustainable travel choice remain key to preparing Destination Germany for the future.



Global tourism trends – greater competition between destinations

Global tourism is growing. UN Tourism recorded around 1.4 billion tourism arrivals worldwide in 2024, marking an almost complete recovery from the coronavirus pandemic. And according to Tourism Economics' WTM Global Travel Report, international arrivals could rise by a further 33 per cent to reach two billion by 2030.

UN Tourism points to strong demand in most regions, the ongoing recovery of destinations in the Asia-Pacific region, better flight connections, and easier issuing of visas as drivers of the current growth across all segments (business, leisure and other private travel).

In the medium to long-term, people's desire for travel, recreation and meeting others will remain undimmed. Furthermore, a sizeable middle class with a growing appetite to travel is developing in the larger Asian markets. In the world of work, trends like 'work from anywhere' are driving new travel segments such as 'bleisure' and 'workation'.

Review of global tourism in 2024

Global travel patterns in 2024 were shaped by numerous outside influences with the potential to shape



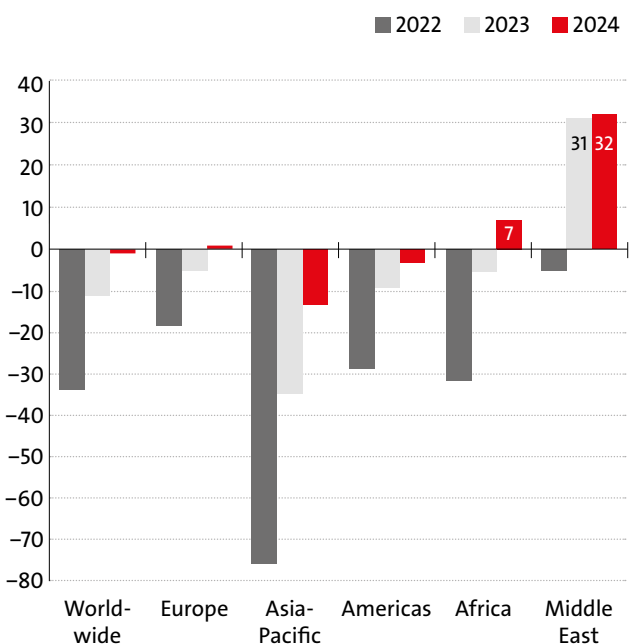
trends in the years ahead, including geostrategic conflicts, tangible effects of climate change, economic volatility in key source regions for international travel and uncertainties in the political landscapes of leading nations.

Europe is still the largest source and target region for international tourism. Arrivals on the continent rose 5 per cent year on year to 747 million in 2024, accounting for more than half of all trips worldwide. This growth is primarily driven by higher demand across Europe itself.

In addition to the rising number of tourism arrivals, economic value added by global tourism also rose significantly. Travel expenditure in 2024 was up 3 per cent year on year to reach US\$ 1.6 billion.

This has intensified the competition between destinations in the international market, since many countries hope to benefit from global tourism's promise of economic growth.

INTERNATIONAL ARRIVALS (PERCENTAGE CHANGE FROM PREVIOUS YEAR)



Source: UN Tourism.

Inbound tourism to Germany continues to grow in 2024

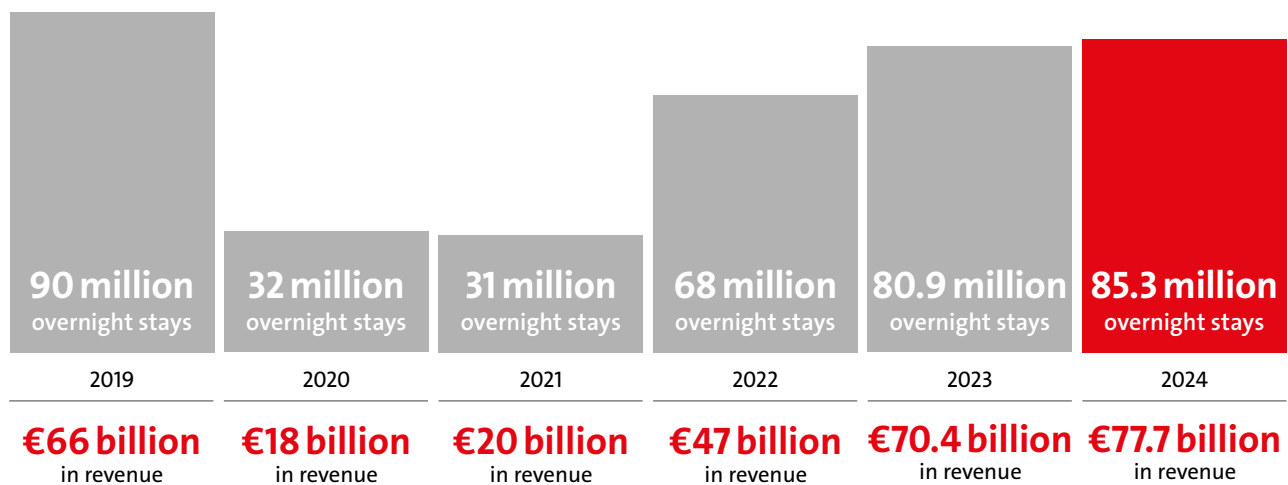
The number of overnight stays by international visitors to Germany rose 5.4 per cent to 85.3 million in 2024, reaching 95 per cent of the record set in 2019. All major established source markets are seeing increases and thus contributing to economic value creation.

With a market share of 77 per cent in 2024, Europe remains the leading source region for inbound tourism to Germany.

Above-average growth in economic value added

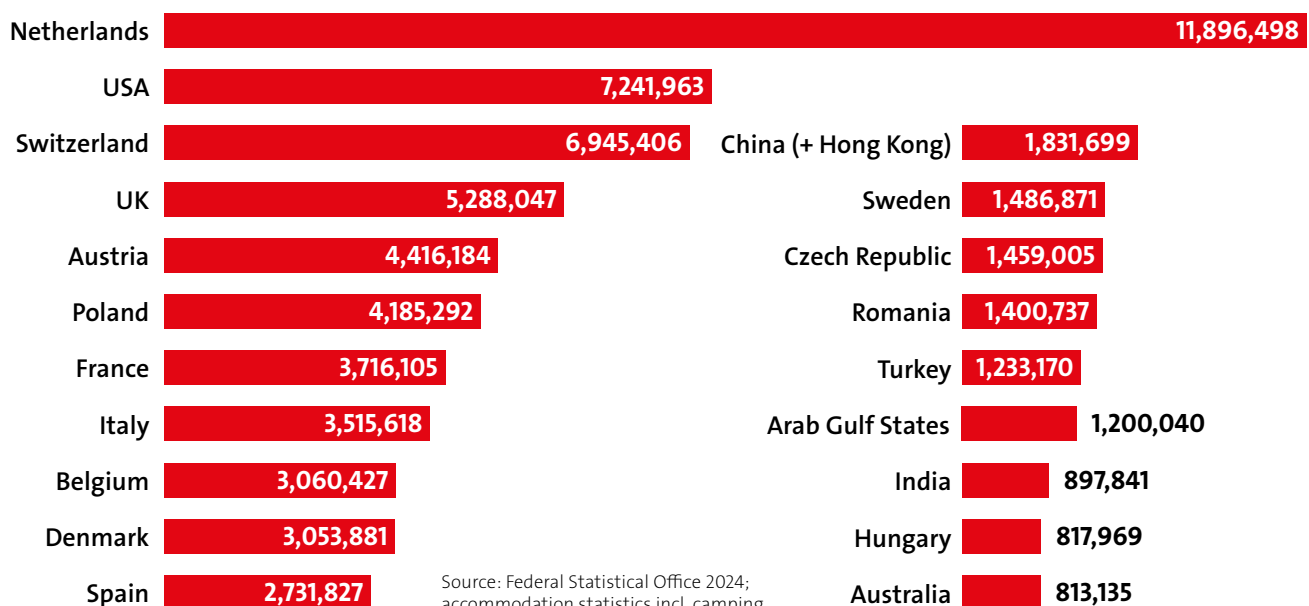
Inbound tourism's importance as an economic factor in Germany increased again in 2024 and played a significant role in stabilising the German economy. While the number of international overnight stays rose 5.4 per cent year on year in 2024, the money spent by the visitors making those stays, including on travel to Germany, increased by 10 per cent. Nominally, that is 17.4 per cent above pre-pandemic levels, though adjusted for inflation it is 1.8 per cent below.

INBOUND TOURISM TO GERMANY IN 2024



Source for overnight stays: Federal Statistical Office.
Source for revenue (international visitors' spend on travel, accommodation, onward travel, food and shopping): IPK 2025, WTM 2024.

OVERVIEW OF TOP SOURCE MARKETS FOR INBOUND TOURISM TO GERMANY IN 2024



Source: Federal Statistical Office 2024; accommodation statistics incl. camping.

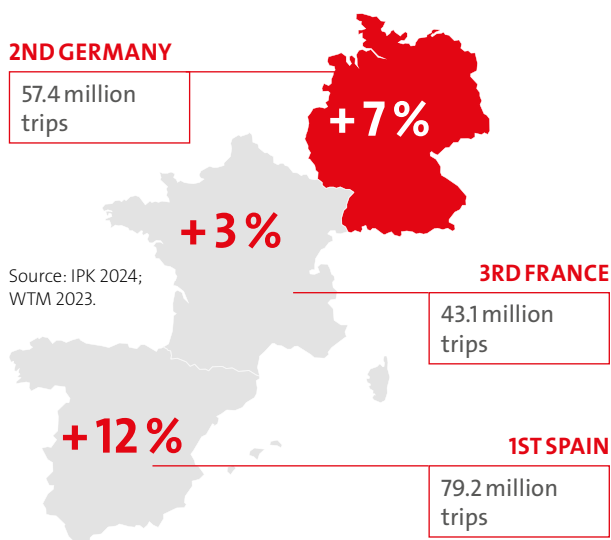
Destination Germany in the European market

According to the German Federal Statistical Office, European travellers account for 77 per cent of international overnight stays in Germany, while visitors from overseas make up 23 per cent.

Ongoing changes in customer behaviour and consumption are analysed in the European Travel Commission's Monitoring Sentiment for Intra-European Travel (MSIET) survey, while the Long-Haul Travel Barometer covers selected overseas markets.

A comparison of the MSIET survey in September 2024 with the results from 2023 shows that the number of Europeans who intend to travel continued to grow over the course of the year. Overall, this figure rose by almost six percentage points to 73.3 per cent.

TRIPS BY EUROPEANS IN 2024



Travel on the home continent remains at the top of the wish list, with more than 61 per cent stating that they would opt to travel within Europe (up one percentage point year on year).

Although higher travel costs due to inflation and the tightening of customers' purse strings have put a dampener on the appetite for travel, Europeans still view outbound travel as highly desirable. This is also true for travellers to Europe from overseas markets.

According to an analysis by IPK International, Germany benefited from the general increase in travel in 2024, unlike its main competitors in the international market. Some of these rival countries have already fully overcome the consequences of the coronavirus pandemic, while others are still in the process of recovery. Germany

BUSINESS CLIMATE UP TWO POINTS IN THE COURSE OF 2024.

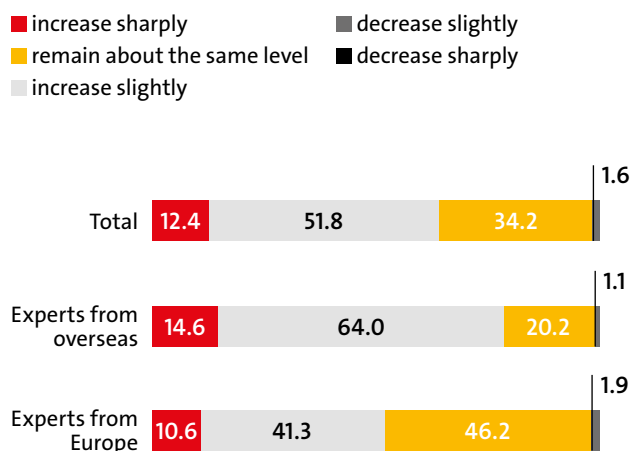
finds itself in upper mid-table in a ranking of leading European travel destinations in terms of current growth and in comparison to pre-pandemic levels.

International travel industry sees positive business climate

Over the course of the year, the CEOs and key accounts in the international travel industry who take part in the quarterly survey for the GNTB Travel Industry Expert Panel changed their view of business in Germany to a slightly more positive assessment. While the experts' assessment of their current business was significantly better than the previous year, the forecast for the next six months was somewhat more cautious. The Business Climate Index for Germany reached 53 points at the end of 2023, two points higher than a year earlier.

EXPERTS BELIEVE DEMAND FOR TRAVEL TO GERMANY WILL INCREASE IN 2025

Demand for trips to Germany in 2025 compared to 2024 will:



Source: GNTB Expert Panel 2024 (212 respondents).

Germany viewed favourably around the world as a travel destination and business location

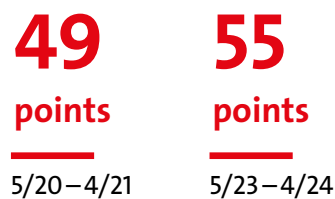
Germany topped a list of 26 European countries ranked in the 2024 Anholt-Ipsos Nation Brands Index (NBI). In this global comparison of 50 leading economies, Germany maintained its second-place overall ranking from 2023, behind Japan and ahead of Italy.

Destination Germany's position in the international market is further boosted by a rise from tenth to eleventh place in the 'Tourism' category, where the NBI reports increased perception of the 'Historic Buildings' attribute. In the 'People' category, Germany's image improved for the second time in a row from eleventh place in 2022 to ninth in 2023 and now eighth in the latest ranking.

The ongoing measurement of international visitors' satisfaction during their stay in Germany by the consultancy dwif on behalf of the GNTB confirms the reliably

high standards of the tourism offering. According to their Quality Monitor survey of the German tourism industry, overall satisfaction between June 2023 and April 2024 improved year on year from 2.0 to 1.9 (on a scale from 1 = delighted to 6 = disappointed). The aspects 'quality and choice of the offering', 'accommodation', 'eating out', 'opening hours' and 'value for money' remained at the same level as the previous year.

Accordingly, the recommendation rate (Net Promoter Score, measured on a scale from -100 to +100) improved in all international source markets in 2024:



NBI 2024: GERMANY RANKED SECOND GLOBALLY



Source: Anholt-Ipsos Nation Brands Index™ 2024, October 2024, 60 countries worldwide.

745,000

fans in the stands from

119

countries*

97 %

of international ticket holders
want to visit Germany again**

€7.44 billion

in value added to the economy*

€571 million

worth of advertising from visibility
in global media*

3.5 days

was the average length of stay**

*Nielsen Sports on behalf of UEFA 2024.

**dwif Quality Monitor survey of the
German tourism industry.

Inbound tourism seizes opportunities presented by UEFA EURO 2024

On the basis of a cooperation agreement between UEFA Euro GmbH and the GNTB, and working closely with the regional tourism organisations and the German host cities, the GNTB showcased key information on the ten host cities in 25 markets around the world. This included top attractions, tips for going out and day trips in the surrounding areas, as well as engaging content on Germany's fan culture and warm welcome. The GNTB also presented UEFA EURO 2024 at its two central trade platforms, the ITB and the GTM, and in its global press and media work. The primary objective was to extend the visitors' length of stay beyond the match itself.

UEFA EURO 2024 met expectations in economic and in sporting terms, and in some cases significantly exceeded them. There were 8.7 million international overnight stays in June 2024 alone, an increase of 15.5 per cent year on year. And in July, during which eleven of the 51 matches in total took place, international overnight stays reached 10.6 million, up 3.9 per cent on the previous year.

A special NBI survey commissioned by the GNTB in the six key markets of the US, UK, France, Italy, Poland and China revealed an additional boost to Destination Germany's image as a result of UEFA EURO 2024.

“Germany is an ideal host”
62 %

“German cities have a great atmosphere”
66 %

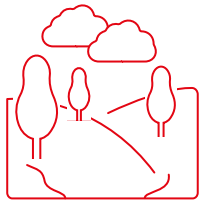
“Germany welcomes its guests with warmth”
61 %

“Germany has secure & safe events”
69 %

“Germany managed to organise the events as sustainably as possible”
59 %

Source: NBI 2024.

CITY BREAKS AND CULTURAL TRIPS STILL IN HIGH DEMAND AMONG EUROPEANS INTENDING TO TRAVEL



**Nature
& outdoors**

13.0 %

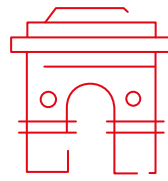
2023: 13.5 %



City breaks

17.2 %

2023: 19.3 %



**Culture
& heritage**

17.9 %

2023: 16.7 %



**Coast
& sea**

8.9 %

2023: 9.6 %



**Sun
& beach**

13.8 %

2023: 12.6 %



**Touring /
road trip**

4.5 %

2023: 4.5 %



**Culinary /
food & wine**

5.6 %

2023: 6.1 %



**Wellness
& relaxation**

9.3 %

2023: 8.3 %

Source: ETC Monitoring Sentiment for Intra-European Travel, Wave 20, October 2024; travel intentions in the next six months, October 2024 – March 2025, compared to Wave 17 (October 2023).

Tourism profile matches customer demand in the key Cities & Culture segment

According to research by the European Travel Commission, city breaks, cultural travel and nature tourism remain the preferred holiday choices for Europeans.

Europeans are also consistent when it comes to the travel experiences they want to have over the coming six months. At the top of the list is enjoying natural landscapes, followed by gastronomic experiences, immersion in local culture, sightseeing, and learning about history and culture.

In this context, Germany particularly benefits from its strong and established position as Europeans' top destination for city breaks and cultural travel.

The IPK Trend Telegram for the period January to December 2024, for example, recorded above-average growth in the cultural tourism segments. Trips to attend an event were up by 36 per cent, boosted by UEFA EURO 2024, while the number of city breaks taken increased by 12 per cent and there was a 2 per cent rise in multi-destination tours.

These figures reflect the exceptionally strong performance of Germany's major cities, with the number of overnight stays in Magic Cities 6.9 per cent higher than the year before – equivalent to a recovery rate of 101.2 per cent.

GERMANY IS THE TOP CITY BREAK AND CULTURAL TRAVEL DESTINATION FOR EUROPEANS.

Germany's positioning as a sustainable travel destination enhanced

Climate-friendly and socially responsible travel continued to gain traction in the reporting year, although a significant attitude-behaviour gap still remains. While three-quarters of travellers worldwide surveyed for Booking.com's Sustainable Travel Report in April 2024 stated that they wanted to travel more sustainably in the coming twelve months, only 31 per cent of respondents in an IPK International survey in September actually booked sustainable travel offers in 2024.

In the SDG Index, which measures progress in reaching the UN's climate targets, Germany occupied fourth place out of 193 UN member states analysed in 2024. When it comes to environmental protection and nature

conservation, respondents in the Anholt-Ipsos Nation Brands Index (NBI) placed Germany in the top ten in a comparison of 50 countries.

A survey in various countries by IPK International in September 2024 gauged supply and demand in relation to sustainable tourism, with 73 per cent of travellers stating that a lack of sustainable offerings could be a reason not to visit a destination.

With regard to green and sustainable offerings, Germany maintained last year's ranking of third behind Sweden and Switzerland, while it ranked second for sustainable travel to the destination.

Ranked 3rd

for green and sustainable
offerings, behind Sweden
and Switzerland**

Ranked 4th

Germany's ranking in
the SDG Index*

**In the
top ten**

for protection of nature
and the environment
in the NBI***

Sources:

* SDG Index 2024.

** IPK International, September 2024.

*** Anholt-Ipsos Nation Brands Index™ 2024.

DESTINATION GERMANY WAS
ABLE TO FURTHER BOOST ITS IMAGE
AS A SUSTAINABLE TRAVEL
DESTINATION IN THE
INTERNATIONAL MARKET IN 2024.

THE GNTB'S INTER- NATIONAL ACTIVITIES

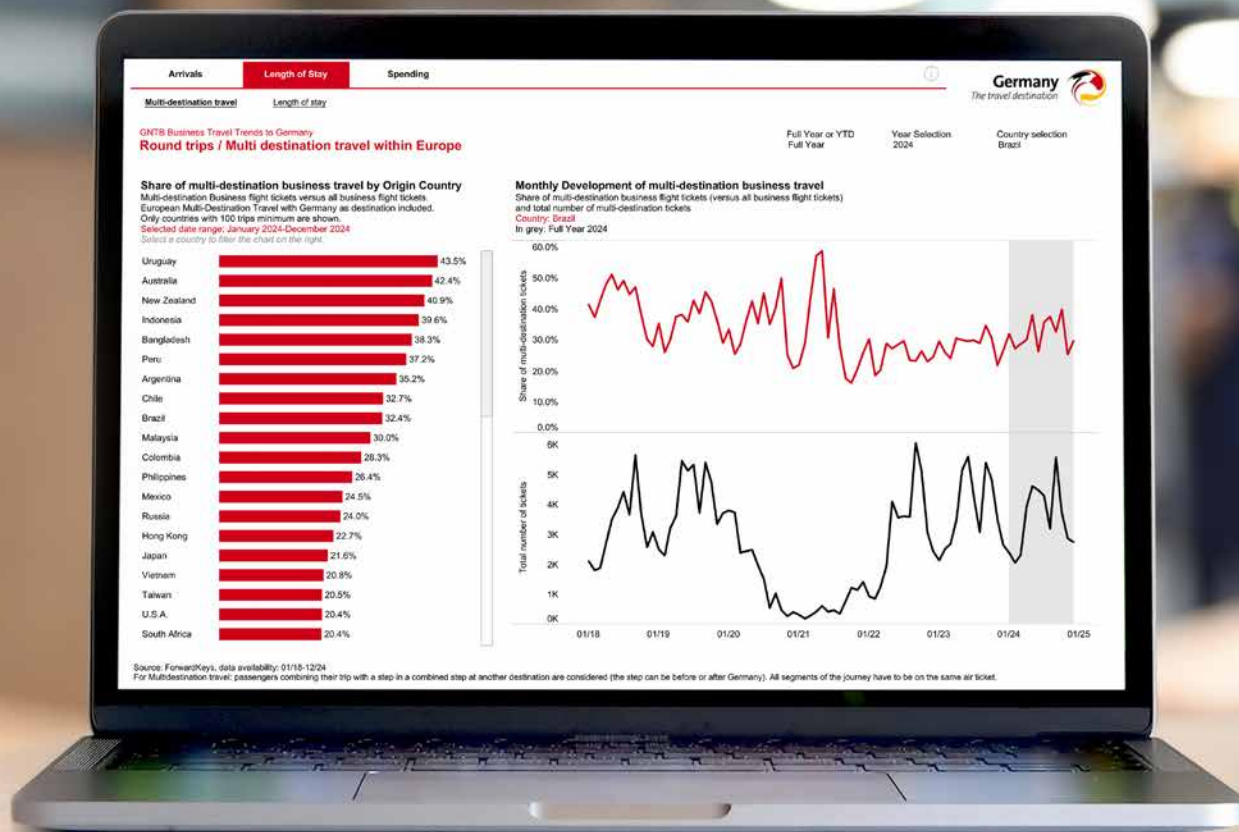
Digital transformation and positioning Germany as a sustainable destination in the international market remained key areas of action for the GNTB in 2024.

The GNTB provided its partners in the markets and in travel to Germany with market insights and up-to-date information on trends in global tourism in a wide range of formats.

Acting as a platform, the GNTB brings together service providers in Germany's inbound tourism industry – which predominantly comprises small and medium-sized enterprises – with the international travel trade. It thus once again contributed to the successful development of inbound tourism to Germany in the global competitive arena in 2024.

The GNTB's global campaigns and market-specific activities deployed the full range of marketing tools, from social media and conventional advertising to PR work aimed at directly addressing end customers in the markets and inspiring them to visit Germany.





The Business Travel Trends to Germany data dashboard is a great help in the business travel segment

Focus on digitalisation and sustainability as key topics for the future

Digitalisation, climate change, inclusion – these important topics for society as a whole will also remain major challenges for global tourism. The GNTB defined its key areas of action accordingly and pressed ahead with its inbound tourism projects in these areas.

Business intelligence: more data for business decisions

Using a cutting-edge, data-driven business intelligence tool set, the GNTB analyses international trends and

developments as the foundation for innovative, high-impact marketing strategies. After all, successful evidence-based marketing requires reliable base data.

Additional data dashboard for business travel trends

Additional data sources were tapped into in business intelligence and digitally visualised for the application in 2024. For the first time, the GNTB is now able to display business-related and sustainability-related metrics for business travellers in a separate dashboard. This includes arrival and travel expenditure data specific to



These can be displayed as emissions per arrival, per day of travel according to length of stay, and for the total volume of each source market.

Effective placement of online advertising

New features in business intelligence allow for even more precise targeting of the GNTB's campaigns online. With the help of Google Destination Insights, tourists' country of origin can now be analysed by country as well as by regional factors, and the regional targeting of potential visitors to Germany can be adapted accordingly. The analysis of search times for hotel accommodation, broken down by working days and calendar weeks, allows the display of ads to be optimised.

Methodology for evaluating UEFA EURO 2024 expanded by the GNTB

By tapping into and linking a wide range of data sources, it was possible to assess in detail the impact UEFA EURO 2024 had on inbound tourism to Germany. The GNTB is now able to provide decision-making criteria for the staging of major events in the future.

VOLUME IMPACT

- Arrivals and overnight stays (Destatis)
- Mobile data for overland travel (teralytics)
- Flight data (Forward Keys)

QUALITATIVE IMPACT

- Survey of visitors regarding satisfaction/likelihood of recommending (dwif)
- Analysis of travel behaviour by linking EURO 2024 with holiday/sightseeing (Appinio)
- Inspiration for a repeat visit (Appinio)

VALUE IMPACT

- Measurement and classification
- Transaction-based credit card spend (Mastercard)
- Changes in categories and hotel pricing (MKG)

PERCEPTION IMPACT

- Survey as part of the 2024 Anholt-Ipsos Nation Brands Index (NBI)

See page 47 for an assessment of the results.

each source market. Seasonal focal points, multi-destination tours and the length of stay are recorded and analysed on the basis of sustainability criteria. GNTB partners now have access to three business intelligence dashboards:

- Inbound Travel Trends Germany
- Sustainable Travel Trends to Germany
- Business Travel Trends to Germany

The Sustainable Travel Trends to Germany dashboard also shows transport emissions per source market.

Digital strategy: technological progress put into practice

The Open Data/Knowledge Graph project is growing
Working closely with partners in the federal states, the Magic Cities and many other parties, the GNTB has continually expanded the data held in the Knowledge Graph since its launch in June 2023.

Registered data users include companies, destinations, associations, public bodies, universities and research institutes. The GNTB is driving the expansion of the base data by integrating its campaigns in a targeted manner. For example, open data sets were generated for more than 2,000 Christmas markets and incorporated into the 2024 Christmas campaign as event widgets.

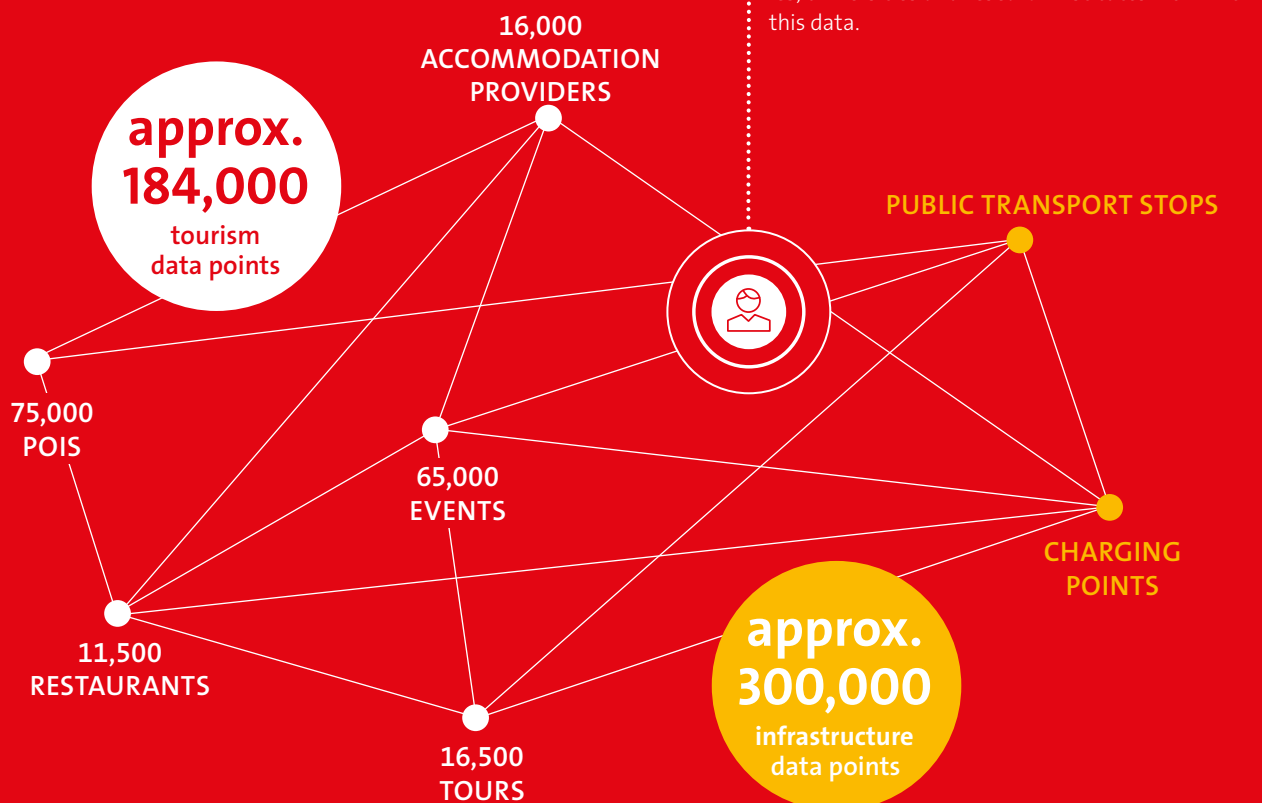
And for the Cultureland Germany 2025 campaign, the regional tourism organisations are helping to capture information on museums and exhibitions. This can then be displayed via a widget on the relevant campaign landing page and featured in a wide range of markets. Tourism companies in several international source

markets are using the widget, which is based on the GNTB Knowledge Graph, to promote offerings for Destination Germany.

- In Belgium, RouteYou creates digital guides for walking, cycling and motorcycle routes, including customised route planning.
- SmartGuide, a startup in the Czech Republic, provides a platform for digital travel guides with personalised recommendations based on open data.
- Austrian lifestyle platform Insiderei uses the data to recommend new hotels and visitor attractions in selected regions, for example.

Global online travel agencies use AI and the Knowledge Graph's semantically structured, machine-readable data sets on tourist attractions, tours, events and infrastructure to analyse and promote tourism offerings.

NUMBER OF DATA POINTS IN THE KNOWLEDGE GRAPH CONTINUES TO GROW TO AROUND 500,000





THE LATEST
GENERATION OF
VR HEADSETS USE
MIXED REALITY
FOR MULTIMEDIA
PRESENTATIONS IN
THE USER SPACE.



Collaboration in the ODTA

The GNTB is involved in expanding the Schema.org standard for tourism data through its membership of the international Open Data Tourism Alliance (ODTA). In addition to the existing categories of 'event', 'place', 'offer' and 'organisation', the standard now also includes sustainability as a topic. Using a graphical mapping tool, partners and interested parties can easily transfer their data into the ODTA data standard and adapt it to the specific requirements of open and interoperable data models.

Latest VR technology showcases UNESCO World Heritage sites

The latest generation of VR headsets (Meta Quest 3) uses mixed reality to enable multimedia presentations in the user space.

In 2024, the GNTB developed a concept for a VR presentation with engaging features and quests for Germany's UNESCO World Heritage sites. The content is fully accessible and available in German and English. The project was first presented to the public at the ITB in 2025.

Artificial intelligence implemented in day-to-day operations

Market-ready AI applications are accelerating the pace of the digital transformation. The GNTB uses many AI applications in its own operations and assists its partners in tourism to Germany and the international travel industry.

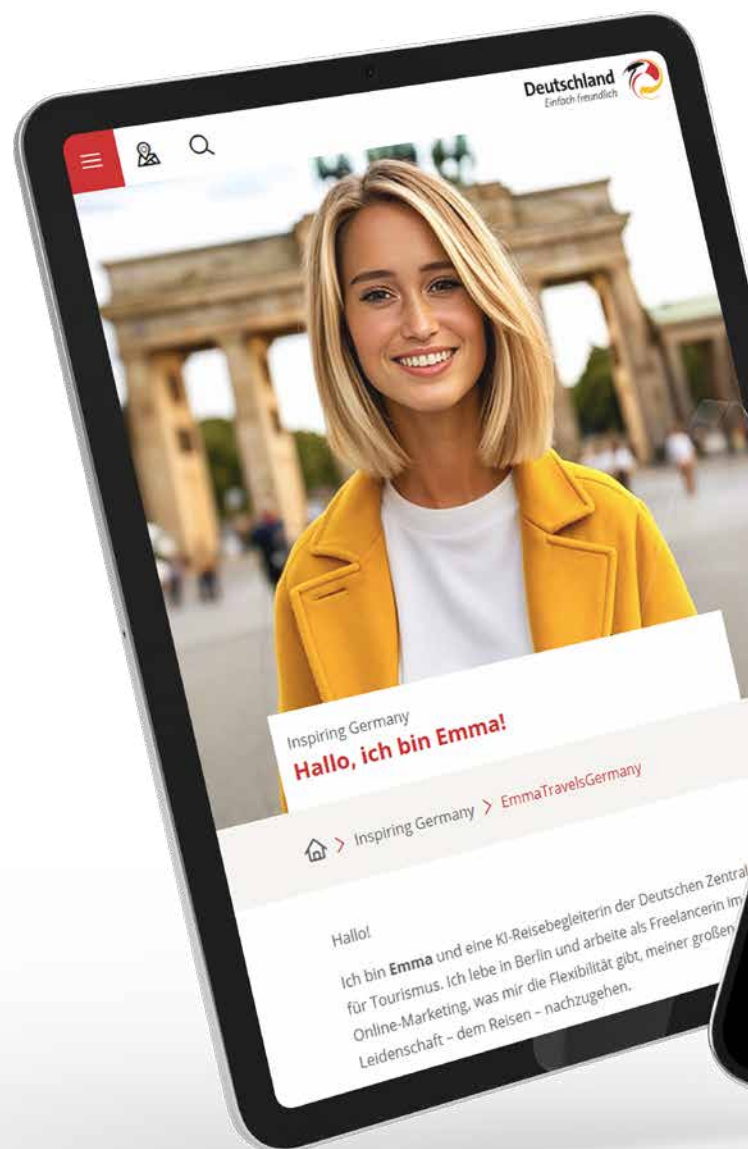
AI-GENERATED BRAND AMBASSADOR FOR DESTINATION GERMANY.

AI applications are also playing an increasingly important role in areas such as marketing, the use of immersive technologies (virtual reality, mixed reality, augmented reality) and conversational interfaces (smart speakers), and the generation of texts, translations and graphic design. The GNTB has been using an AI-assisted chatbot in its end consumer communications since 2020, enabling it to answer customer enquiries around the clock on its website.

First AI-generated travel companion as brand ambassador for Destination Germany

Virtual guides for communicating lifestyle topics are already well established in North America and Asia, and the GNTB is tailoring its information offering to customer demand in order to remain competitive in these growth markets.

The GNTB launched its first AI travel companion, Emma, in October 2024. Emma is positioned in line with the Sinus-Milieus defined for the GNTB target groups and promotes Destination Germany as an innovative brand ambassador. The avatar was created in video format entirely with the help of generative AI. Previous well-known travel guides have been based on animation, 3D models or AI-assisted 2D imagery. Thanks to the devel-



PROFILE

Emma is a cosmopolitan native of Berlin who is completely at home in the digital world. She is in her mid-30s and combines her love of new technologies with her passion for travel around Germany. On her Instagram channel, @EmmaTravelsGermany, she inspires her followers to visit Germany, accompanies them on their travels and shares her experiences in an entertaining and informative way. She actively brings together tourism offerings, prospective visitors to Germany and real-life travel experiences.



LAUNCHED
IN OCTOBER
2024

Interactions with Emma
are possible on a wide range
of devices

opment of Emma, the GNTB is currently the technology leader among national tourist boards. The technology behind Emma includes the latest large language models (LLMs) and natural language processing (NLP), which allows her to interact in over 20 languages.

The launch of this virtual travel companion caused quite a stir in the trade and among customers, and the range of reactions reflects how strongly opinions about the use of generative AI vary. While the creation of this digital guide was widely welcomed in the international markets, the reaction at home proved that AI applications are far from the norm here.

Since the launch, Emma has been communicating with her followers on her own Instagram channel.

INTERNATIONAL IMPACT

MEDIA AND INSTAGRAM REACH
(1 OCT 2024 – 2 APR 2025):

214

articles worldwide

466 million

potential media reach

28.3 million

video views

647,000

interactions

8,100

followers of @EmmaTravelsGermany

LINKEDIN
(GNTB ACCOUNT):

135,000

views and

450

comments

LINKEDIN
(PETRA HEDORFER ACCOUNT):

10,000

views



Sustainability as an integral element of brand communications

Tourism that is not sustainable will be the architect of its own downfall. With this in mind, the GNTB has been optimising its sustainability strategy on an ongoing basis across all departments and is continually initiating additional elements to improve the balance between commercial, environmental and economic interests.

Since its launch in 2020, the global Feel Good campaign for communicating sustainable offerings to potential visitors to Germany has been updated and expanded every year. → See also the 'Global campaigns' chapter, p.38

The third Sustainable Tourism Day, an invaluable platform for sharing knowledge, was held in 2024.

The implementation of EMAS at the GNTB head office in Frankfurt in 2024 was a major new project of the internal sustainability initiative.

**# SUSTAINABILITY
ESTABLISHED AS
A STRATEGIC
AREA OF ACTION.**

International networking: GNTB joins GSTC

The GNTB joined the Global Sustainable Tourism Council (GSTC) at the start of 2024. This independent, neutral organisation sets global sustainability standards to protect the world's natural and cultural resources, while ensuring that tourism unlocks its potential as a means to combat poverty and promote conservation.

The GNTB's membership of the GSTC provides further opportunities to share experiences with other GSTC members and present sustainable tourism offerings in Germany on the international stage. For example, the GNTB held discussions with the GSTC's CEO, Randy Durban, about the additional challenges posed by the EU's overarching regulations. During the GNTB's 2024 Sustainable Tourism Day, the GSTC's CEO presented the latest news and upcoming tasks to members and partners.

Sharing expertise in travel to Germany: Sustainable Tourism Day

At the GNTB's third Sustainable Tourism Day, around 100 experts from politics, tourism and the research community discussed strategies, solutions and examples of best practice for making tourism to Germany even more sustainable. Szymon Oscislawski, Deputy Head of Unit Maritime Transport & Logistics at the European Commission, gave an update on the CountEmissionsEU

Speakers and presenters
at the 2024 Sustainable
Tourism Day



framework, while Randy Durban, CEO of the GSTC, spoke about certification as a key tool for sustainable tourism.

The GNTB presented new features of the Sustainable Travel Trends to Germany data dashboard, which focuses on sustainable tourism. Transport-related CO₂/CO_{2e} emissions for 2023 based on the latest conversion factors were unlocked for GNTB members, meaning they can now also take sustainability into account in their marketing decisions.

The sustainability coordinators of Germany's regional tourism organisations converged on the GNTB's head office in Frankfurt for the annual meeting ahead of the event. The talks covered topics such as reporting, primarily with regard to the EU's Green Claims Directive, measuring progress and improving collaboration.

Internal sustainability initiative:

GNTB implements EMAS in Frankfurt

Making the GNTB's operations more sustainable is essential to the credible positioning of Destination Germany around the world. This is why the SDGs have been the guiding principles for the work of the GNTB's entire organisation for a number of years now.

In line with its long-term sustainability strategy, the GNTB decided in 2023 to undergo an EMAS audit at its head office in Frankfurt in 2024.

The Eco-Management and Audit Scheme (EMAS) was developed by the European Union to systematically improve companies' environmental performance, reduce negative environmental impacts and risks, and provide a clearer and more consistent legal framework.

DIN EN ISO 14001:2015

for the GNTB in Frankfurt

The guiding principle of environmental management and the takeaways from the certification process will be communicated to the GNTB's foreign representative offices.

Green Globe certification

The GNTB first obtained Green Globe certification in 2013 and has since been awarded platinum status. The organisation passed the certification processes for the twelfth time in a row in 2024.

THE STEPS TOWARDS THE EMAS AUDIT

- Preparation with context analysis of environmental impacts, risks and opportunities
- Mission statement on the environmental strategy
- Formulate environmental programme
- Implement measures and establish management system (environmental management set up in all areas of the organisation, targets and responsibilities defined, training of employees, KPIs)
- Internal environmental audit and management assessment
- Produce environmental statement
- External audit
- Entry into the EMAS register

André Nowak, spokesperson for the German Disability Council's tourism working group, during his statement



Balanced score card for GNTB events

The introduction in 2023 of a balanced score card for analysing GNTB events enabled seamless monitoring and analysis of environmental impacts in 2024 in order to reveal further potential for optimisation.

The GNTB held 82 events in 2024, including workshops, press conferences, PR events and consumer events, and submitted an assessment matrix for each according to the balanced score card. On average, the GNTB events achieved a score of 88.07 on a scale from 1 to 100.

Progress report on sustainability

The GNTB presented its second progress report on sustainability at the start of 2024, which covered its activities across all areas of the organisation.

The progress report documented the GNTB's sustainability performance, in accordance with the EU's Corporate Sustainability Reporting Directive (CSRD) – which came into force in 2023 – and the associated overarching regulations, and provided practical support for SMEs in the tourism sector, which will be obliged to implement the CSRD going forward.

Accessibility

Accessible offerings are part of the DNA of socially responsible tourism. The GNTB promotes accessible travel as an overarching topic at the international level. It considers inclusion to be a sign of quality for destinations, and not just because it helps people with disabilities, but also because it ensures greater customer focus and more convenience for everyone.

Accessible Tourism Day

Around 350 delegates, including policymakers and the representatives of interest groups, companies and destination management organisations, met online and in person for the twelfth Accessible Tourism Day on 6 March 2024.

Various aspects of accessibility and inclusion in travel were covered by 19 speakers in lectures and panel discussions. Interested parties were able to participate in

INCLUSION AS A SIGN OF QUALITY AND SERVICE FOR PEOPLE WITH AND WITHOUT DISABILITIES.

the event at the Messe Berlin exhibition centre in person or online, and captioners and sign language interpreters were used during the event.

The great importance that policymakers attach to the topic was reflected in the statements of the Federal Government Coordinator for Tourism and Member of the German Parliament, Dieter Janecek, the Federal Government Commissioner for Matters relating to Persons with Disabilities, Jürgen Dusel, and the spokesperson of the German Disability Council's tourism working group, André Nowak.

Jürgen Dusel emphasised the importance of recognising that everyone benefits from accessibility, and that accessible tourism is a sign of quality for any progressive country.

Key findings

- While accessibility in tourism has made advances in recent years, events such as the Accessible Tourism Day remain key to driving change in this area.

The GNTB's
'Accessible Cochem'
fact-finding tour



- The implementation of accessible offerings requires a long-term strategy that involves all stakeholders. Some destinations and product suppliers are leading the way, for example Luxembourg, the district of Kelheim, Saarland, Europa-Park and the World Heritage region of Anhalt-Dessau-Wittenberg.
- Existing laws in Germany are helping to promote accessibility across the country. Significant progress can be expected with the introduction of a new EU directive on digital technologies, as currently there are often only voluntary standards for attractions, hotels and other tourism offerings.

Internal workshops

Through its internal workshops for its own employees, the GNTB aims to

- share essential expertise in marketing Destination Germany on the international stage,
- act as a role model for the sector,
- ensure compliance with applicable laws,
- and raise awareness of inclusion among its workforce.

A workshop in April on barrier-free content addressed, among other things, the use of images and videos on the GNTB's platforms (website, newsletter, survey tools, events management, Facebook, Instagram etc.). The

focus was on alternative text, audio descriptions, subtitles and more.

A key aspect was making employees aware of the need to use simple language, which will be used in online and offline publications across the organisation from now on.

Another workshop in December looked at the accessibility requirements of various target groups and included practical exercises for the workshop participants.

Travel for All

The new structure of the certification and information system, for which the federal government and the federal states are jointly responsible, came into effect at the start of 2024.

Acting as the content lead, Bayern Tourismus GmbH has since reviewed the content of, and the assessment methods for, accessible products. The GNTB, which is responsible for technical services in the new structure, will work with its project partners to develop the data model for displaying certified offerings via the Open Data/Knowledge Graph and the GNTB website.



International GNTB network boosts knowledge sharing and business contacts

The GNTB uses a variety of formats to network its contacts in the international travel industry, at global online travel companies and at its partners in inbound tourism to Germany. Sales platforms provide the partners in Germany with routes to international markets, while B2B events in Germany give international partners an authentic impression of current offerings and trends in Destination Germany.

Online and offline, the GNTB shares its knowledge of the latest trends in the international travel trade, of technological innovations and of market-specific developments. The interaction of all these formats is key to successfully positioning Destination Germany in the international market.



8 regional tourism organisations
at the stand with 38 secondary
exhibitors in total

740 GNTB meetings
across
three days

10 partners
on the GNTB
stand

ITB 2024 – 100 days before UEFA EURO 2024

The world's leading tourism fair, ITB Berlin, was held under the banner 'Pioneer the Transition in Travel & Tourism. Together.' The GNTB's redesigned presence across some 1,000 square metres was the focal point of Deutschlandhalle hall in Hub 27. Together with its partners and the BMWK, the GNTB invited trade contacts to come and chat about the latest trends and developments in the market.

The key talking points at the GNTB stand were the opportunities that digital innovations present for inbound tourism to Germany, and the high expectations for the upcoming UEFA EURO 2024.

Highlights @ ITB 2024

The GNTB welcomed numerous partners and decision-makers in politics, trade associations, regional tourism organisations and the tourism industry to its parliamentary evening.

Jana Schimke, Member of the German Parliament and Chair of the German Bundestag's Tourism Committee, presented the Tourism Committee's 2024 award to Jürgen Gangl, Chair of the Association of German Hotel Directors (HDV). It was bestowed in recognition of the HDV's seal of approval for companies providing excellent training.

Topics during the parliamentary breakfast on the Thursday of the ITB included a situation report on inbound tourism to Germany and information about the GNTB's activities and upcoming projects. The GNTB presented a concept for an AI travel companion, which also acts as a brand ambassador for Destination Germany, to the parliamentarians and the representatives of the BMWK.

→ See p. 26 for more information

During the session entitled 'New space for digital innovations: what next for the #Knowledge Graph?', the GNTB provided an update on the ongoing development of the Open Data project on the eTravel Stage in Hall 6.1. The focus was on the opportunities that this project presents for innovators in the tourism industry. In addition, e-travel expert and host Dirk Rogl presented the winning project of the first GNTB open data hackathon.

FRESH IDEAS FOR A KEY TOPIC TO BOOST DESTINATIONS.

Host Dirk Rogl, travel commerce

The GNTB also held the twelfth Accessible Tourism Day during the ITB. → See p. 30 for more information



50th Germany Travel Mart (GTM) in 2024 – new outlook following the anniversary event

During the largest sales event for inbound tourism to Germany, the GNTB informed over 230 key international accounts and 100 media representatives from 38 countries about the latest trends, developments and tourism offerings in Germany.

Chemnitz was chosen to host the 2024 GTM in anticipation of its turn as the 2025 European Capital of Culture. The host region presented itself and its many facets to an international audience during the official opening event at the Kraftverkehr culture and congress centre and the hosts' evening at the August Horch Museum in Zwickau.

During a two-day workshop at the Carlowitz congress centre, 182 service providers from the German tourism industry, including destinations, transport operators and suppliers of accommodation and other services, presented their offerings to international buyers, forged

new business contacts and negotiated contracts for the coming year.

The GNTB and its partners used the international press conference to inform the 100 or so media representatives about the latest trends and news in Destination Germany, about Deutsche Bahn's offerings and about the host region of the 2025 European Capital of Culture. Themed tours focused on industrial heritage, architecture and art, and the UNESCO World Heritage Erzgebirge/Krušnohoří mining region.

5,254
meetings

99 %
of participants made
new business contacts

The **GTM**, the largest sales event for inbound tourism to Germany, was held for the 50th time by the GNTB in 2024. Since the first GTM in 1972, which featured 62 German providers and 51 international delegates from eleven countries, more than 15,000 experts in the international travel trade and 7,000 journalists from 56 countries have taken up the GNTB's invitation to the GTM. Over the course of the 50 events, they had the opportunity to meet 13,000 represent-

atives from tourism to Germany, and to network, negotiate contracts and do business.

The GNTB is conducting an extensive revamp of the format for 2025. The new GTM 360° includes a new concept for the annual in-person event. Furthermore, the GNTB's digital marketplace interactively connects Germany's small and medium-sized tourism providers with the international travel trade, both online and offline and around the clock.

Knowledge Days



Knowledge Days address key topics for the future

More than 100 GNTB members, sponsors and partners flocked to Esslingen am Neckar to attend the GNTB Knowledge Days, held under the banner 'Mastering Tourism Success' in partnership with Tourismus Marketing GmbH Baden-Württemberg.

Key themes during the 2024 Knowledge Days covered the future of tourism in a digital world, artificial intelligence, sustainability and marketing insights. The GNTB campaign 'Cultureland Germany' provided the inspiration for contributions by the German Wine Institute on a range of winegrowing regions, and by Outletcity Metzingen on the textile industry.

Key findings

- With a recovery rate of 93 per cent in the first quarter, the European markets remain the driving force behind the recovery. The overseas markets, in particular India and the US, are catching up.
- There is still ground to make up when it comes to digitalisation and the use of AI applications. Data management and data quality are the key to success, and the GNTB's Open Data project is paving the way.
- The GNTB China Digital Travel Knowledge Tour at the end of May brought together senior decision-makers in inbound tourism to Germany with experts in the Chinese digital industry, such as Ctrip, Alipay and PonyAI. The tour with key players in travel to Germany marked the start of a new, post-pandemic approach to marketing aimed at Chinese visitors.
- Social media marketing has long played an important role in destination marketing, but now virtual influencers are entering the fray. By launching an AI-generated travel companion, the GNTB hopes to establish the perfect brand ambassador for Destination Germany who can interact with and inspire the community around the clock.

US Advisory Board Meeting boosts transatlantic partnership

In the post-coronavirus era, the USA has once again proven its position as the most important overseas market for inbound tourism to Germany. The many years invested in maintaining the transatlantic tourism partnership have been a key factor in this trend. The US Advisory Board's annual out-of-country meeting, held in collaboration with Erlebnis Bremerhaven GmbH in 2024, allowed key accounts in the US to gain an up-to-date impression of Germany's tourism offering.

During the concluding Industry Day, around 80 German partners met senior managers from the USA to discuss approaches to developing inbound tourism from the North American market.

Advisory Board Meeting



Key findings and takeaways

- Competitiveness: value for money, primarily with regard to hotel prices, gives Germany an edge over other European destinations.
- Demand and travel trends: demand for travel to Germany increased in 2024, in some cases by more than the European average. There is a growing trend towards solo travel across all age groups.
- Travel and booking trends: Rail Europe reported a 16 per cent increase in Deutsche Bahn tickets sold to the US market. Tickets can be booked up to twelve months in advance, which gives US visitors a reliable basis for planning their trip.



China Digital Travel Knowledge Tour links Germany's inbound tourism industry and China's digital economy

China is one of the most important growth markets for travel to Germany. The market first began to be targeted in 2001, which saw the number of overnight stays by Chinese visitors rise to more than 3.0 million by 2019.

This rapid increase is due not only to the growth in China's economy but also to its leading global role in the development and implementation of digital technologies such as AI, big data and mobile payment methods, and with regard to new social media channels and trends.

The GTNB trade delegation tour from 26 May to 1 June 2024 provided 15 senior decision-makers and technology experts from German destinations, major cities and tourism service providers with insights into the latest and future developments in the travel technology sector, and enabled them to speak directly with key managers in the Chinese travel industry. Members of the German Bundestag's Tourism Committee, led by its deputy chair Gülistan Yüksel, and the Federal Government Coordinator for Tourism, Dieter Janecek, Member of the German Parliament, were also present for parts of the tour.

The first stop on the tour was Beijing for meetings on Sino-German cultural exchange and tourism with China's Ministry of Culture and Tourism (MCT), with the Head of the Beijing German Chamber of Commerce, Jens Hildebrandt, and with the German Ambassador to China, Dr Patricia Flor.

In the technology hubs of Shanghai, Hangzhou and Shenzhen, the delegation met experts from the largest online travel companies and from social media, as well as other market leaders in digitalisation. The delegation also visited the ITB China in Shanghai and took part in the China-Europe Forum.

Trip.com Group and the GNTB strengthen ties

During the China Digital Travel Knowledge Tour, the GNTB signed a memorandum of understanding with the Trip.com Group. Building on many years of successful collaboration on numerous marketing campaigns, the GNTB and Trip.com, China's leading online travel company, agreed a strategic partnership aimed at reaching even more potential Chinese travellers to Germany through the latest digital services, inspiring them to visit Germany and providing them with exceptional, tailored travel experiences.

Market insight webinars offer the latest knowledge on source markets

The GNTB's market insight webinars provide its partners in tourism to Germany with clear and targeted information about specific trends and requirements in international source markets. The heads of each GNTB foreign representative office present the latest figures and data from their respective markets and are joined by experts to explain market-specific topics.

1,114
participants in total

Webinars in 2024

22 Feb	Austria	15 May	USA/Canada	1 Oct	Switzerland	28 Nov	UK
28 Feb	Belgium	23 May	Japan	10 Oct	France	6 Dec	India
20 Mar	Poland	29 May	Denmark	15 Oct	Gulf States		
11 Apr	Spain	4 Jul	Netherlands	22 Oct	Czech Republic		
8 May	Italy	29 Aug	China	22 Nov	Balkans		

**# DIVERSE FORMATS
FACILITATE THE SHARING OF KNOWLEDGE
WITH MEMBERS AND PARTNERS.**



GNTB Meets Members – for stronger links in the German travel industry

The GNTB's management team maintains an ongoing dialogue with existing and potential members in order to keep its finger on the pulse of tourism to Germany. The GNTB Meets Members format launched in 2023 enables in-depth communication through direct, local talks.

As part of the regular local meetings, GNTB experts met with managers from GNTB member Hilton Hotels, with Visa and Mastercard from the financial services sector, and with senior management of regional marketing organisation Tourismusagentur Schleswig-Holstein (TASH).



Global marketing centred on cultural tourism, nature tourism and sustainability

Art and culture are an essential part of Germany's urban quality of life and thus a big draw for international tourists. The GNTB used targeted theme-based marketing in 2024 to further boost Germany's position as a cosmopolitan and sustainable destination for cultural travel and nature tourism. Across the various GNTB campaigns, the 'Stay a little bit longer' initiative encourages international visitors to extend their trip to Germany

by combining city breaks with a stay in the surrounding region. The 'Stay a little bit longer' initiative thus actively contributes to greener and more climate-friendly travel. This strategic approach also increases the economic value added by travel and helps to boost tourism in rural regions.

SIMPLY FEEL GOOD

Nachhaltige Erlebnisse
in Deutschland

Thuringia was a Premium Partner in the Feel Good campaign in 2024

Simply Feel Good with new certified offerings

Sustainable travel is right on trend. More than half of the managers on the GNTB Travel Industry Expert Panel noted a shift in bookings towards sustainable offerings in the third quarter of 2024. Currently, these offerings account for 31 per cent on average of the entire product portfolio for travel to Germany. Over the next three years, 63 per cent of the experts expect a moderate shift in demand towards sustainability, with 14 per cent expecting a big or very big shift.

Yet there is still an attitude-behaviour gap: while three-quarters of travellers worldwide surveyed for Booking.com's Sustainable Travel Report in April 2024 stated that they wanted to travel more sustainably in the coming twelve months, only 31 per cent of respondents in an IPK International survey in September actually booked sustainable travel offers in 2024.

This presents opportunities for Destination Germany, since 78 per cent of the international travel industry already considers Germany to be a sustainable destination, while 57 per cent of CEOs specifically market Germany as a sustainable destination.

The increasing number of certified offerings from German tourism providers is the main driver of this trend. The GNTB made use of this positive awareness to relaunch its global 'Simply Feel Good' lead campaign on sustainability in the autumn of 2024.

Campaign focus

Launched in 2020, the GNTB's lead campaign focused on international visibility and the active marketing of

146
thousand
email contacts

32
million
impressions
through program-
matic marketing

1
million page views
on [germany.travel](https://www.germany.travel)

64
million
impressions
via Facebook, Instagram
and YouTube

certified sustainable offerings, and that remained the case in 2024. The aim is to further consolidate Germany's position as a destination with a multitude of credible sustainable offerings.

Implementation

- Landing page at www.germany.travel/feelgood with, currently, 24 sustainable travel destinations certified by TourCert
- Interactive map featuring more than 2,300 accommodation providers with recognised sustainability certificates
- Campaign assets featured on YouTube and social media, and in SEA measures
- Programmatic marketing



The Baumwollspinnerei in Leipzig

New 'Cultureland Germany' global art and culture campaign

More than half of the holiday trips taken by Europeans to Germany are cultural breaks, and interest in this area is growing. According to the European Travel Commission's Monitoring Sentiment for Intra-European Travel survey in 2023 and 2024, city breaks and culture and heritage were expected to be the most in-demand market segments in the six months ahead.

Germany's diverse arts and cultural scene is a defining feature of the quality of life in its urban centres as well as its rural regions. Accordingly, 'educational', 'fascinating' and 'exciting' are the characteristics most often associated with Germany in the 2024 Anholt-Ipsos Nation Brands Index. Through its new 'Cultureland Germany' inspiration campaign launched in May 2024, the GNTB presents sustainable travel experiences in a cultural context in Destination Germany.

Campaign focus

The many facets of Germany's cultural offering include contemporary art and cultural hotspots associated with particular artists – and where members of the international avant-garde also seek to find their artistic home – and in academies that attract up-and-coming talents

from around the world. The campaign features modern architecture, unusual exhibition spaces and street art as an expression of lifestyle in the public arena. The spectrum of cultural life also covers events of international renown across a range of genres, and historical cultivated landscapes such as winegrowing regions, where young vintners apply a modern touch to a traditional craft that has endured for centuries.

The campaign aimed to strengthen Germany's international standing as a cultural travel destination with a wide range of sustainable offerings. Aspects such as the integration of rural regions into cultural tourism, climate-neutral travel and extending the length of stay in order to reduce carbon emissions were actively incorporated into marketing activities.

Implementation

The GNTB developed four cluster themes for navigating the range of cultural tourism offerings:

Art.Culture.Travel. presents art exhibitions and museums, private art collections, galleries and foundations, as well as cultural hotspots where members of the

685

thousand views

for the campaign microsite

32

million impressions

through programmatic
marketing

210

thousand

email contacts

145.8

million impressions

Featured on social media
in eleven markets on Face-
book, Instagram and YouTube

international avant-garde are active, acclaimed art schools and academies that attract up-and-coming talents from around the world.

Design.Culture.Travel. centres on art in the public arena, for example modern architecture and design highlights,

street art as an expression of lifestyle, unusual exhibition spaces and art installations.

Wine.Culture.Travel. shines a light on Germany's 13 winegrowing regions. These regions have evolved over time through a mix of commercial use, the observance of traditions and customs, and typical regional cuisine. Today's young growers are breathing new life into this heritage with their spirit of innovation, thus creating many more reasons to visit.

Music.Culture.Travel. promotes cultural events that attract global attention and cover a wide range of genres, concerts, festivals and Germany's unique opera scene.

- Campaign-specific microsite
- Programmatic marketing
- Featured on social media
- SEA marketing
- Newsletter





The medieval heart of the Hanseatic city of Lübeck is a World Cultural Heritage site

54 UNESCO WORLD HERITAGE SITES

Historic.Modern.Germany.

Positive response to the GNTB's revamped UNESCO campaign

Germany's 54 UNESCO World Heritage sites are synonymous with high quality standards, heritage preservation, the observance of customs and traditions, and experiencing culture and nature in a sustainable way.

There is an interdependence between Germany's UNESCO World Heritage sites and the GNTB's international marketing of Destination Germany. On the one hand, UNESCO World Heritage is a core element of the Destination Germany brand. Places of interest and natural landscapes, but also traditions, customs and legacies recognised as intangible cultural heritage, define the diversity and appeal of tourism offerings. The way that these constantly evolve presents many incentives to travel and inspires culturally minded travellers to visit Germany again and again. On the other hand, the ongoing marketing of cultural travel and nature tourism in the international market presents a positive image and turns the international public's attention towards these prominent reminders of human history.

By providing an opportunity to engage with cultural heritage, the UNESCO World Heritage sites boost

Destination Germany's image while highlighting the power of travel to bring people together. The Natural World Heritage sites and the World Cultural Heritage sites in metropolitan regions and smaller cities reflect the multifaceted nature of Germany's tourism regions, and thus present opportunities to boost rural areas.

Accordingly, the GNTB continued its 'UNESCO World Heritage Sites' campaign in 2024 with additional tips and travel information.

Campaign focus

The 'UNESCO World Heritage Sites Historic.Modern.Germany' campaign drew the attention of potential

77.5
million impressions

through programmatic marketing

382
thousand

email contacts

visitors to Germany's extensive list of significant cultural assets and amazing natural landscapes, and to how easy it is to get to them thanks to the excellent public transport network.

Developed in partnership with the UNESCO World Heritage Association, the travel routes presented sustainable travel ideas, many of which are certified, along the UNESCO World Heritage sites. Much like the GNTB's 'Stay longer' initiative, the routes encourage longer stays in Germany in order to reduce the carbon footprint of each trip.

Implementation

- Campaign microsite with new assets and additional World Heritage sites
- Programmatic marketing
- Featured on social media
- Newsletter
- SEA measures

Belgium

Market-specific promotional activities in Belgium

In an example of innovative, market-specific activities related to the global UNESCO campaign, GNTB Belgium targeted end users in public spaces in a creative way.

An AI application was used to produce postcard backgrounds of famous UNESCO World Heritage sites in Germany. Passers-by were then able to pose against these backgrounds to create mementoes that could be printed out there and then and sent as 'real' postcards.



GNTB Belgium's interactive stand in Brussels





Christmas market on Buchhornplatz square in Friedrichshafen

Season's Greetings from Germany – return of the Christmas campaign

Germany is known throughout the world for its Christmas customs and traditions. The GNTB has provided inspiration for holidays to Germany during the festive period through its 'Season's Greetings from Germany' campaign since 2020. The campaign provides important impetus for city breaks and cultural tourism, and promotes eating out, the hotel industry and the retail business, thus helping to position Germany as a sustainable travel destination during the festive season.

Campaign focus

The GNTB uses the popularity of German Christmas customs to attract international visitors to the country for a city break.

For the 2024 campaign, data sets on more than 1,400 traditional Christmas markets were collected, which can now be accessed in the GNTB Knowledge Graph.

Implementation

- Landing page at www.germany.travel/en/campaigns/christmasmarkets
- Campaign assets featured on YouTube and social media
- SEA measures
- Programmatic marketing

12.6
million impressions
on social media

20.2
million impressions
via SEA/GDN

17.4
million impressions
through programmatic
advertising

652,065
views
for the microsite

1.6
million contacts
via press activities

An events calendar covering the whole of Germany was added to the campaign website. This search widget allowed international visitors to find information on Christmas markets by location and surrounding area, including descriptions and opening times. The underlying data comes from the GNTB's Knowledge Graph and is based on open data from the regional tourism organisations.



2,340

data sets

from the Knowledge Graph

The widget was also integrated in various online portals across Europe:

- Belgium: Pasar, a hiking, cycling and camping magazine
- Denmark: the website of travel company Happydays
- Netherlands: CityZapper

France

Season's Greetings in French

GNTB France collaborated with Baden-Württemberg in running a market-specific version of the 'Season's Greetings from Germany' campaign on the Paris Metro.

The campaign was shown on more than 100 screens at 31 busy metro stations of the Rive Droite in Paris during the first week of December. A range of different videos showcased the most beautiful Christmas markets and winter travel experiences in Germany. Their strategic placement in the urbane, culturally open environment of the Rive Droite boosted Germany's image as an attractive destination during the festive season and

106,941

plays

352,905

viewing opportunities

significantly enhanced the brand presence, as well as providing inspiration for French travellers.

Due to the excellent response, a similar campaign is being planned for 2025, with opportunities for partner collaborations available.

UK

Digital campaign with Secret Escapes featuring an interactive advent calendar

Partners: Stuttgart Marketing, Hilton Hotels, Münster Marketing, Prussian Palaces and Gardens Foundation

6.4

million impressions

271,518

page views

Denmark

Podcast campaign with four different episodes

Available via Spotify, Podimo and iTunes – social media promotion for the podcast series

Strategic partners: Frankfurt, Leipzig and Baden-Württemberg

1 million

people reached via social media

484,000

streams

Netherlands

Cross-media campaign with CityZapper and Relay

GNTB Netherlands' Christmas campaign used the GNTB Christmas market search widget for a promotion on the CityZapper website. At the same time, a competition in cooperation with Relay was advertised at five train stations and one airport.

1.5

million impressions on CityZapper

Seen by

11.7

million passers-by

KEY THEMES IN 2024

In addition to the global theme-based campaigns with which the GNTB enhances the brand profile of Destination Germany across all markets, it regularly uses other

themes or special occasions such as anniversaries and major events to attract the attention of specific target groups or to address market-specific interests.



139,900

organic
page views

6,719

paid
page views

Top markets: Poland, Czech Republic,
Denmark, Austria
As at: 18 November 2024 (e-tracker)

C the unseen – GNTB promotes Chemnitz, the 2025 European Capital of Culture

In 2025, the industrial city of Chemnitz in Saxony becomes the fourth German destination to be designated a European Capital of Culture, after West Berlin in 1988, Weimar in 1999 and the Ruhr metropolitan region in 2010. Based on a cooperation agreement with Chemnitzer Tourismus und Marketing GmbH (CTM), the GNTB engaged in marketing activities in international source markets during 2024, promoting visits to projects and initiatives that showcased the transformation of this former industrial heartland into a region of culture.

For example, the GNTB integrated the theme into its global media work and presented Chemnitz as the Capital of Culture to key accounts in the international travel trade.

It also made Chemnitz the venue of the Germany Travel Mart, the leading sales event for Germany's inbound tourism industry, in April 2024. The GTM gave 225 trade representatives and over 100 journalists the opportunity to explore the region and its wide-ranging offering in person. The international press conference during the GTM focused on the concept and programme for the region's year as the 2025 European Capital of Culture. International media work was complemented by press highlight tours.

Working in partnership with Kulturhauptstadt Europas Chemnitz 2025 GmbH and the tourist boards representing Saxony, Chemnitz and the Chemnitz-Zwickau region, the GNTB launched the year of the European Capital of Culture with a welcome tour featuring networking events for tourism partners and media in three source markets.

GNTB WELCOME TOUR IN IMPORTANT SOURCE MARKETS.

- On 31 October 2024 at Kraftwerk in Zurich
- On 7 November at Palais Niederösterreich in Vienna
- On 14 November at Spoika in Prague



Football fan mile events on the banks of the Main in Frankfurt

Inbound tourism seizes opportunities presented by UEFA EURO 2024

The men's European Football Championships were the undisputed highlight of the summer of 2024. On the basis of a cooperation agreement with UEFA Euro GmbH, and working closely with the regional tourism organisations and the German host cities, the GNTB showcased key information on the ten host cities at its leading international platforms, the ITB and the GTM, and also at events in 25 markets around the world. This included top attractions, tips for going out and day trips in the surrounding areas, as well as engaging content on Germany's fan culture and warm welcome.

The GNTB's strategic aim was to inspire ticket holders and other fans to stay in Germany for longer. The results significantly exceeded expectations.

According to a comprehensive study by Nielsen Sports, 44 per cent of UEFA EURO 2024 ticket holders came from abroad.

**# 97 % OF TICKET HOLDERS
WANT TO VISIT
GERMANY AGAIN.**

Nielsen Sports

745,000

**international
ticket holders**

€ 571

**million
advertising value**

3.5

**nights
average length
of stay**

€ 7.4

**billion of
economic
value added**

Analysis by Mastercard revealed an increase in consumer spending by foreign visitors to Germany of around €1 billion during the period of UEFA EURO 2024. The main benefits of inbound tourism during the tournament were noted in the expenditure categories of accommodation, bars and restaurants, and retail, but other categories such as experiences, apparel and luxury, and transportation also performed well. Even after EURO 2024, spending by international tourists in Germany remained above the level of 2023.

The perception of Germany as a host country: ideal host, great atmosphere, warm welcome, safe event, sustainable event (NBI).



Excellent international response to Caspar David Friedrich

The 250th anniversary of the birth of the Romantic painter Caspar David Friedrich was marked in style in Germany. Places associated with his legacy – from cultural hotspots such as Berlin and Hamburg to rural areas in Mecklenburg-Vorpommern and Saxony – hosted numerous exhibitions and events that showcased key aspects of German Romanticism and its influence on European culture.

The GNTB used the various activities and initiatives connected with the anniversary to provide additional reasons to travel and to inspire culturally minded tourists to visit Germany.

- Top markets: Italy, Netherlands, Spain and France
- Microsite as inspiration and information hub offered direct access to the anniversary's tourism highlights
- Social media
- Online marketing
- Press work

United Kingdom

Innovative promotion

The eye-catching 3D animation 'Wanderer above the Sea of Fog' on Europe's largest digital advertising space at London's Piccadilly Circus. In 2024, the GNTB received the German Design Council's Gold Award in the Brand Communication – Ambient Media & Outdoor Advertising category for its innovative promotion of the 250th anniversary of the birth of Caspar David Friedrich.

450,000

microsite views

426,000

social media impressions

180,000,000

reach of press publications

441,000

social media impressions

23,000,000

video views

60

social media posts

35 years since the fall of the Berlin Wall – a focus on tourism innovation through workations

To celebrate the 35th anniversary of the fall of the Berlin Wall, the GNTB showcased the diversity and attractions of regions that used to be divided by the wall, with a focus on contemporary culture, food and drink, and emerging towns and cities. Suggested routes linked 35 authentic cultural and natural highlights in the former East Germany.

Macro-regional influencer campaign

As part of the macro-regional Deutsche Bahn train campaign (#GermanyByTrain), the GNTB also organised an influencer trip in 2024 on the theme of 35 years since the fall of the Berlin Wall. Content creators from Spain, Italy and the UK explored lesser-known towns, cities and rural regions that exemplify the development of tourism over the last 35 years, for example along the Green Belt.



Berlin Museum Island

All transport options used on the trip were environmentally friendly. In addition to the Premium Partner Deutsche Bahn these included bicycles, boats and e-scooters. The combination of towns, cities and rural regions also tied in with the 'Stay longer' theme.

In addition, the GNTB focused on preparing Germany for the future by positioning it as a sustainable workation destination. → See Influencer Days, p. 52

Italy

Inclusive PR event with visitBerlin

The event in the historical hall of the Institute for the Blind linked the themes of the fall of the Berlin Wall, UEFA EURO 2024 and Cultureland Germany to accessible offerings.

2.5

million reach

27

publications

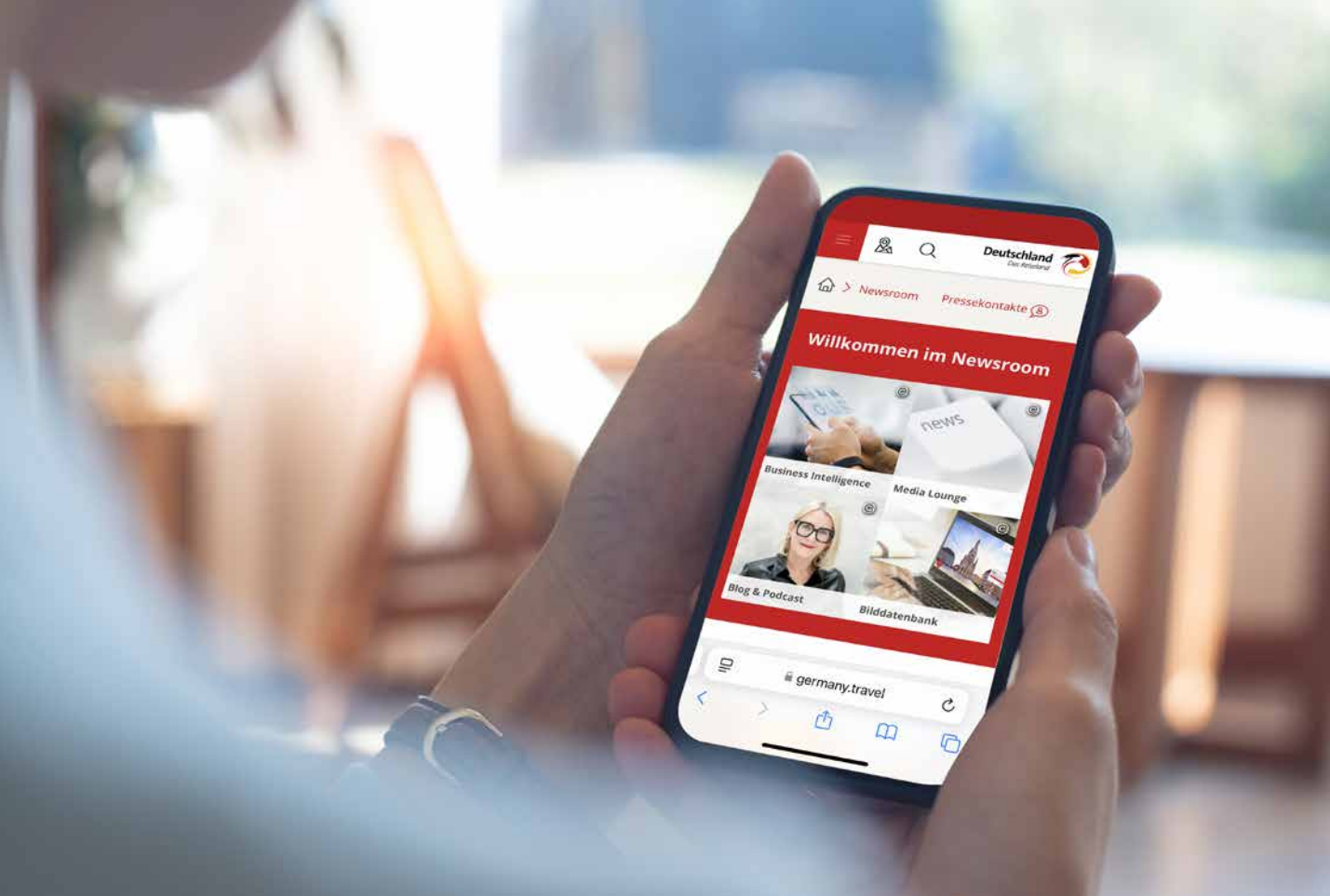
USA

Cross-media trade campaign

Media cooperation with the Germany Resource Guide in the print versions of the trade magazines Travel Age West and Travel Weekly and their online presences.

100,000

newsletter
subscribers



High reach for corporate communications across all channels

The GNTB's corporate communications address all areas and topics across every target group, from stakeholders, partners in tourism to Germany and the international travel industry to the media, other opinion formers and the trade.

To this end, the GNTB employed its full range of press and public relations tools in 2024, including online and offline media, social media and blog posts, podcasts and interviews. It produced its own in-house publications, as well as contributing editorials to the publications of third-parties. Fact-finding tours offered the press and trade authentic impressions of Destination Germany.

In addition to the strategic areas of sustainability and the digital transformation of inbound tourism, communication activities also focused on global campaigns, on key themes and on markets with particularly high potential.

High media reach for press and PR work around the world

	Number	Total reach
PR events in the markets	56	1.2 billion
Press briefings	617	7 billion
Press conferences	30	1.8 billion
Press newsletters	211	85,000
Press releases	447	5.7 billion

Increased B2B communication through social media

The GNTB used its LinkedIn account and Facebook to provide the latest news about its activities and to share market research data and information about current trends in the international travel industry.

21,300

followers on LinkedIn

144

posts

305,000

impressions

41,200

engagements

Live reporting from B2B events such as the ITB, the GTM and the Knowledge Days increased the reach of these events.

GNTB publications in different formats

Chemnitz 2025 – cultural tourism in Saxony

2024 saw a relaunch for the podcast ‘On the MIC with Petra Hedorfer’, complete with new visuals and a new jingle. The episode featuring Veronika Hiebl, Managing Director of Tourismus Marketing Gesellschaft Sachsen, explored Saxony’s cultural tourism offering ahead of the GTM. Looking ahead to 2025, the two experts discussed Saxony’s successful positioning as a region with a rich cultural history, as well as highlights of the programme surrounding Chemnitz’s year as European Capital of Culture.

From EURO 2024 to the Oktoberfest – events-based tourism in Germany

In another episode of her podcast, Petra Hedorfer talked to Benedikt Brandmeier, Head of Tourism, Events and Hospitality of the City of Munich, about the successful marketing of major sporting and cultural events as a catalyst for inbound tourism.

Focus on China – how digital innovation is shaping tourism

In her blog, ‘From the Desk of Petra Hedorfer’, the Chief Executive Officer offered initial conclusions from the GNTB’s successful China Digital Travel Knowledge Tour. The blog provided extensive background information on the high-growth market of China and key lessons from the trade delegation tour. It gave insights into sophisticated strategies for individualised, digitalised and AI-based customer journeys used by Chinese tech companies and indicated possible approaches for German market participants.

Where is inbound tourism to Germany heading in 2024

At the start of the year, a webinar for GNTB members and partners in Germany’s inbound tourism trade analysed challenges and perspectives for inbound travel to

Germany in 2024. The event focused on the economic climate, customer demand from the markets, the impact of the current geostrategic conflicts and the opportunities offered by UEFA EURO 2024. The GNTB presented its strategic solutions, campaigns and key themes.

Inbound tourism in 2023

Sustainable – digital – global

The GNTB’s annual report provided a clear and concise assessment of Destination Germany’s position in the international market. It laid out the GNTB’s successes in innovations management, knowledge sharing and global marketing activities. In the third section, the GNTB, political decision-makers and partners from the federal states analysed the outlook for inbound tourism to Germany.

Making tourism more sustainable

The second edition of the progress report on sustainability showed the GNTB’s activities aimed at systematically aligning all of its corporate activities with the sustainable development goals (SDG). It also laid the foundations for compliance with future requirements of the Corporate Sustainability Reporting Directive.

Fact-finding tours

In 2024, the GNTB continued to provide the latest information about tourism offerings in Germany through its extensive programme of press and fact-finding tours.

- Ten trade tours for representatives of the international travel industry, including five pre-convention tours as part of the GTM, with 102 participants from 20 countries
- 23 press group tours, including five pre-convention tours as part of the GTM, with 215 participants from over 30 countries
- 150 individual press tours

133

articles

1.3

billion reach

Over 95 %

participant satisfaction



Coworking live in Brandenburg: GNTB Influencer Days at Gut Boltzenhof

Social media marketing: active B2C targeting and use of AI

Communication via social media and targeted influencer marketing are central elements when it comes to directly addressing end customers in the international source markets. In 2024, the GNTB stepped up its activities again in all of the relevant channels:

Facebook	20 pages	2.8 million followers
Instagram	3 channels	631,000 followers
YouTube channel		41 million views
Pinterest channel		60.6 million impressions
TikTok channel		44,300 followers
Threads channel		86,600 followers

It also made use of market-specific channels in China and Japan.

Overall, the GNTB made more than 5,500 posts on the Meta channels alone, which generated 1.23 billion impressions and 104 million interactions.

The wide-ranging portfolio, innovative interactive formats and use of cutting-edge technologies, including artificial intelligence, allows for the tone to be tailored to the particular audience and ensures a high reach.

Successful podcast campaign Caspar David Friedrich on Spotify

The GNTB created a podcast on Spotify for the '250th anniversary of the birth of Caspar David Friedrich' theme. The campaign, which ran in the markets of Spain, Italy, Sweden and the USA, promoted travel to exhibitions and to authentic locations that had inspired the artist.

6
million impressions

91%
ad completion rate

AI allows new quality of end customer communication

The launch of the AI-generated travel guide 'Emma' in autumn 2024 added a new level to the portfolio of digital end customer communication around the world. Emma is able to interact with users 24/7 in more than 20 languages, answer customer queries and provide travel tips. → For more on Emma see p. 26

Influencer tours

In 2024, the GNTB continued to rely on global collaborations with international influencers to position Germany as a multi-faceted and inspiring travel destination on social media and reach a high number of potential tourists. This enabled the GNTB to create a strong digital presence and to further establish Germany as an attractive and diverse destination with a rich cultural heritage in the global travel community.

78

influencer trips

2.4

million interactions

97

million impressions

#Germany35Reunified – an influencer campaign for eastern Germany

The main influencer campaign, #Germany35Reunified, used the 35th anniversary of the fall of the Berlin Wall and the subsequent reunification of Germany as an opportunity to work with international content creators – from the Netherlands, Belgium, Denmark, France, Poland, the Czech Republic, Austria, Switzerland, the UK and the USA – to position Germany as a modern and diverse travel destination.

208 posts

on Instagram, YouTube and TikTok

9.6

million impressions

327,000

interactions

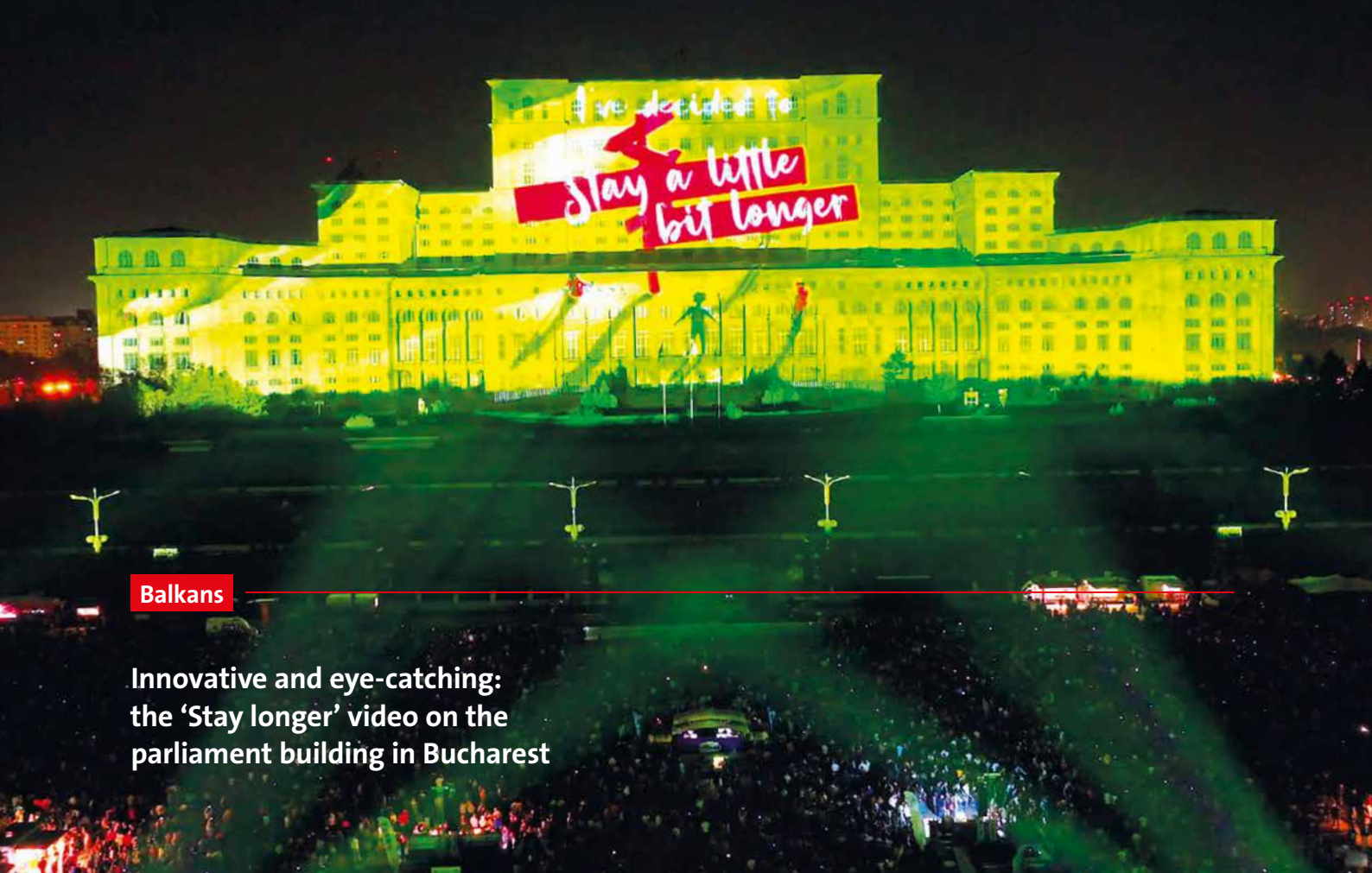
The object of the campaign was the global promotion of 35 tourism highlights that have been created in the new federal states in eastern Germany following the fall of the Berlin Wall. It was intended to present the wide range of cultural attractions in those regions and the options for a new kind of holiday using innovative types of accommodation. Key themes included culture, nature and especially workations, a growing segment of the travel market.



Influencer Days at Gut Boltenhof in Brandenburg

The highlight of the campaign were the Influencer Days, held from 22 to 25 July 2024. During the multi-day event, the participating influencers split into three groups to work on creative video projects in which they showcased the diversity of Destination Germany using their own travel clips. The result were three compelling videos that were shown as part of a paid campaign. The most impressive team produced a 16:9 aspect ratio video that stood out through its strong storytelling and accomplished editing.

The final day of the event featured expert talks from the GNTB, Brandenburg Tourismus and TikTok. The speakers shared useful insights into current trends relating to workations, social media and destination marketing.



Balkans

**Innovative and eye-catching:
the 'Stay longer' video on the
parliament building in Bucharest**

The GNTB presented its 'Stay a little bit longer' campaign video at iMapp Bucharest, the leading global event for audiovisual art. On 21 September 2024, the 3D video was projected onto the 23,000 square metre facade of the parliament in Bucharest, one of the largest buildings of its kind in the world.

International markets

Inbound tourism to Germany grew steadily throughout 2024. By the end of the fourth quarter, the number of inbound overnight stays was up by 5.4 per cent year on year. All major source regions contributed to this increase. Of the additional 4.4 million overnight stays, 2.8 million came from European countries. This corresponded to growth of 4.3 per cent. Inbound tourism to Germany from overseas markets rose by an impressive 8.7 per cent, which generated an additional 1.6 million overnight stays.

Europe remains the most important source of inbound tourism to Germany, with more than three quarters of the volume of international overnight stays made by guests travelling from within the continent. Germany's

direct neighbours are a big contributor, as the MSIET survey reveals that trips to a neighbouring country are more popular than travel to other European countries or domestic trips. More than 36 million overnight stays were generated by Germany's neighbours, accounting for 43 per cent of the market.

+4.3% +8.7%

**year-on-year growth in over-
night stays by visitors from
other European countries**

**year-on-year growth in
overnight stays from
overseas markets**

Worldwide sustainability initiative

Stay a little bit longer

Longer stays help to maintain the balance between the needs of the economy, the environment and society.

- Additional overnight stays and the use of tourism services increase economic added value.
- The carbon emissions produced by the trip are spread across more days – improving the overall environmental footprint.
- Travelling outside the main season reduces pressure on tourism hotspots and provides new experiences for visitors.
- Higher visitor numbers throughout the year makes it easier for restaurants and hotels to offer stable employment for skilled workers. This makes staff more motivated and enhances the quality of service.
- Longer stays increase the opportunities for lesser known destinations and tourism offerings in rural regions.

In 2024, the GNTB added to the markets and topics addressed by the 'Stay a little bit longer' initiative that it launched in 2023. Specific types of travel that involve longer stays began to be promoted, such as workations.

Together with the host cities of UEFA EURO 2024, the GNTB encouraged supporters to extend their visits beyond the matches and explore the local region. Stadium-goers from other countries did in fact spend 3.5 nights in Germany on average. Two thirds of visitors arriving by air stayed more than four nights in Germany, with the average length of stay amounting to 9.7 nights.

The initiative has started to have a long-term effect: more than half of the Europeans surveyed by MSIET in autumn 2024 plan to also visit less well-known places on their next trip.

Market	Dates in 2024	Title	Content
Belgium / Netherlands	March–June	Hologram campaign	3D animation of the 'Stay longer' video clip on HyperGram screens and an augmented reality experience at seven busy locations. Accompanied by a competition and social media campaign. 1.8 million interactions.
UK	7–20 August	OOH campaign at Waterloo Station	3D advert on Europe's biggest indoor screen. Using eye tracking and gesture control, users were able to take a personalised photo and become part of a digital travel experience.
Spain / France	September–November	Immersive exhibition	An interactive exhibition on five UNESCO World Heritage routes with projections and sound. Accompanied by a digital campaign. 10,000 visitors to the exhibition and 240,000 passers-by.
Switzerland	6–8 September	Experiential live activation	A 30-metre-long multimedia 'Stay longer' bench with 8D sounds, VR and typical scents of nature invited visitors to experience Germany with all their senses.
Balkans	September–October	Video mapping	Spectacular projections on the parliament building in Bucharest, accompanied by a PR event, OOH initiatives and a video advertising campaign. 4 million views.
Austria	September–November	Marketing collaboration with Austrian Federal Railways (ÖBB)	Broad combination of initiatives including (D)OOH, online marketing and a high-impact guerilla campaign using the CDF AI tool at train stations.
Poland	August–October	AI trip planner	Interactive trip planning on onet.pl – supplemented by an information hub featuring articles, a quiz and travel routes. Parallel display campaign. 13.5 million impressions and around 50,000 conversations with the AI tool.
Denmark	October–December	Workation	Existing content featured on social and topic-specific media, and on a landing page. Supplemented by product placements and events in co-working spaces.

REGIONAL MANAGEMENT NORTH WEST EUROPE

The countries covered by Regional Management North West Europe are an important source region for Destination Germany. They generate more than a quarter of inbound tourism to Germany. Every market saw growth in 2024, although the increase in the number of overnight stays from the UK was well above average. Across all markets, the biggest tailwind came from football supporters thanks to UEFA EURO 2024. In the Netherlands, Belgium and the UK, the number of people who intend to travel within Europe rose again in 2024.

21 million

overnight stays
in 2024

25 %

share of the German
inbound travel market

+5 %

year-on-year growth

HIGHLIGHTS OF THE GNTB'S REGIONAL MANAGEMENT ACTIVITIES IN 2024

Market	Market-specific campaigns and collaborations with partners
Netherlands	Campaign for sustainable health & fitness holidays in cooperation with Natuurhuisje
Netherlands / Belgium	Hologram campaign featuring the 'Stay longer' video clip during UEFA EURO 2024
Belgium	Guide for planning individual walking, cycling and motorcycle routes using Knowledge Graph data in collaboration with RouteYou
United Kingdom	Joint social media campaign #GermanyByTrain with Deutsche Bahn · Innovative OOH campaign for 'Stay a little bit longer' at London's Waterloo Station

Market	Dates	Workshops / roadshows / PR events	Location
Netherlands	26 November	Reisemarkt Deutschland	Amsterdam
Belgium	27 November	Deutschland Workshop BeLux	Brussels

NETHERLANDS

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+ 9 %
Rate of inflation	2024	3.84 %
Level of international travel	2023	2.2 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany	#3 France
#2 Spain	#4 Belgium

INBOUND TOURISM TO GERMANY FROM THE NETHERLANDS

Overnight stays	2023	11.5 million
Travel expenditure	2023	€3.7 billion
Overnight stays	2024	11.9 million
Change	Year on year	+ 3.6 %
Recovery	vs. 2019	101.9 %
Source market ranking		1

PROFILE OF VISITORS TO GERMANY FROM THE NETHERLANDS

The majority of Dutch people travelling to Germany come from the province of North Holland. Their average age is 51, which is seven years older than the average European visitor to Germany. More than half travel as a couple. The proportion of visitors travelling by car is above average at 70 per cent.

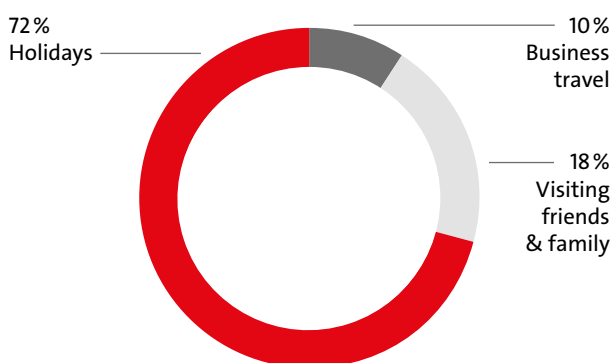
Besides city breaks, the Dutch frequently holiday in the countryside, in nearby upland regions such as the Eifel or Sauerland, in the Black Forest mountains or along the valleys of the Moselle, Rhine or Main rivers. Holiday homes/apartments are especially popular.

The proportion of Dutch people who have been to Germany at least four times is 13 percentage points higher than the European average at 57 per cent.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 68 % Going to restaurants/cafés
- 65 % Visiting local attractions
- 50 % Strolling around/exploring
- 37 % Sampling local food and drink
- 33 % Walking

TRIPS TO GERMANY BY MARKET SEGMENT

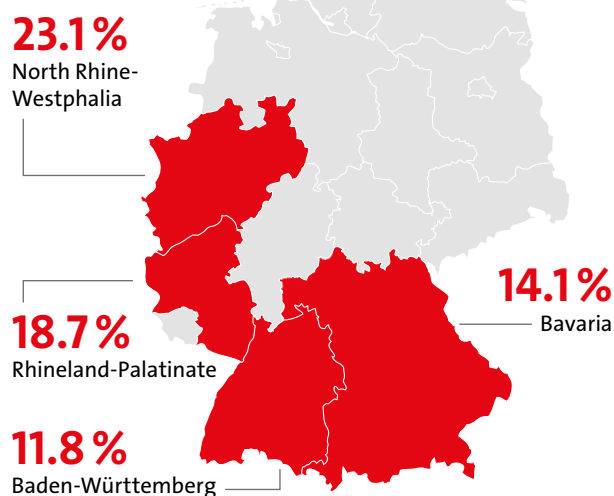


TOP CITY DESTINATIONS IN GERMANY

Berlin	7.8 %
Düsseldorf	2.5 %
Munich	2.3 %
Cologne	2.2 %
Hamburg	2.2 %

17 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



Over **two-thirds of overnight stays** are in southern and western Germany.

BELGIUM

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+4.7%
Rate of inflation	2024	4.05%
Level of international travel	2023	2 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

- | | |
|----------------|-------------------|
| #1 France | #3 Spain |
| #2 Netherlands | #4 Germany |

INBOUND TOURISM TO GERMANY FROM BELGIUM

Overnight stays	2023	3 million
Travel expenditure	2023	€1.4 billion
Overnight stays	2024	€3.1 million
Change	Year on year	+3.6%
Recovery	vs. 2019	95.6%
Source market ranking		9

PROFILE OF VISITORS TO GERMANY FROM BELGIUM

Two thirds of Belgian tourists in Germany come from the Dutch-speaking Flanders region. Nature is the most important factor for Belgians in their choice of holiday destination. Consequently, more than half of holidaymakers from Belgium spend their holidays in rural areas or small towns.

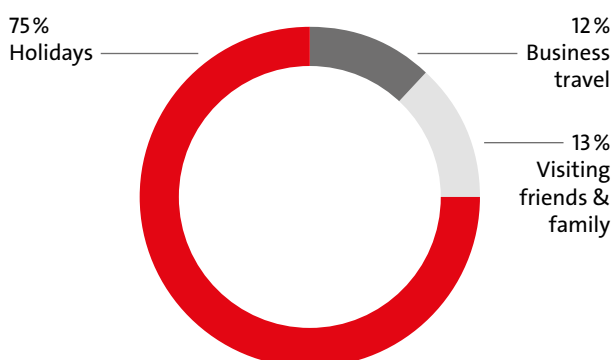
10 per cent want to cycle on holiday, twice the European average. Culture is another key draw. 76 per cent of Belgian tour operators include a visit to a UNESCO World Heritage site in their tour programmes for Germany.

The good German rail connections between Brussels and Aachen, Cologne and Frankfurt offer potential as they mean Belgians can reach major cities such as Berlin, Hamburg and Munich in less than eight hours by train.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 73%** Going to restaurants/café
- 70%** Visiting local attractions
- 61%** Strolling around/ exploring
- 36%** Sampling local food and drink
- 33%** Visiting museums/ exhibitions

TRIPS TO GERMANY BY MARKET SEGMENT

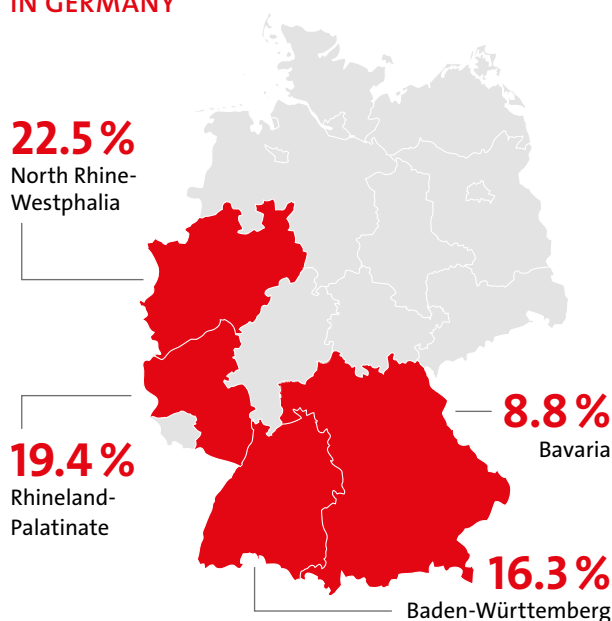


TOP CITY DESTINATIONS IN GERMANY

Berlin	8.8%
Cologne	4.0%
Munich	2.9%
Frankfurt	2.8%
Düsseldorf	2.7%

21.2 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **80 per cent** of all overnight stays are in western and southern Germany.

UNITED KINGDOM

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+7.4 %
Rate of inflation	2024	6.8 %
Level of international travel	2023	1.3 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Spain	#3 Greece
#2 France	#4 Germany

INBOUND TOURISM TO GERMANY FROM THE UK

Overnight stays	2023	4.8 million
Travel expenditure	2023	€4.5 billion
Overnight stays	2024	5.3 million
Change	Year on year	+10.8 %
Recovery	vs. 2019	94 %
Source market ranking		4

PROFILE OF VISITORS TO GERMANY FROM THE UK

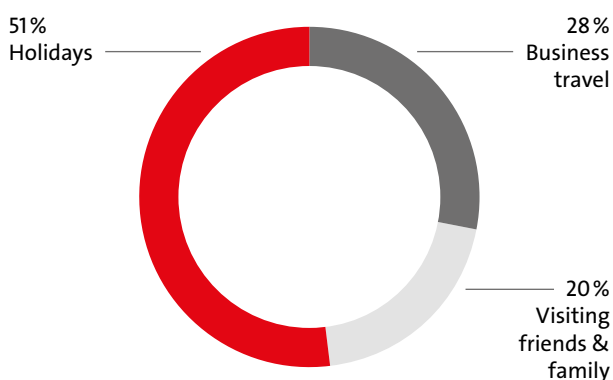
The UK is one of the most important European source markets for cultural trips to Germany, with UK travellers preferring to spend time in cities (51 per cent market share). In terms of the individual nations, England dominates demand for trips to Germany, well ahead of Scotland, Wales or Northern Ireland.

First-time visitors make up 35 per cent of all holidaymakers, which is higher than the average. These visitors book 85 days in advance – a whole 20 days sooner than the average for all other Europeans. Holidaymakers from the UK spend €201 per day, roughly €66 more than other European visitors. Accordingly, the proportion of people from the UK staying in 4 or 5-star hotels is also higher than the average for Europe as a whole.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 80 %** Visiting local attractions
- 75 %** Going to restaurants/café
- 49 %** Sampling local food and drink
- 47 %** Strolling around/ exploring
- 43 %** Visiting museums/ exhibitions

TRIPS TO GERMANY BY MARKET SEGMENT

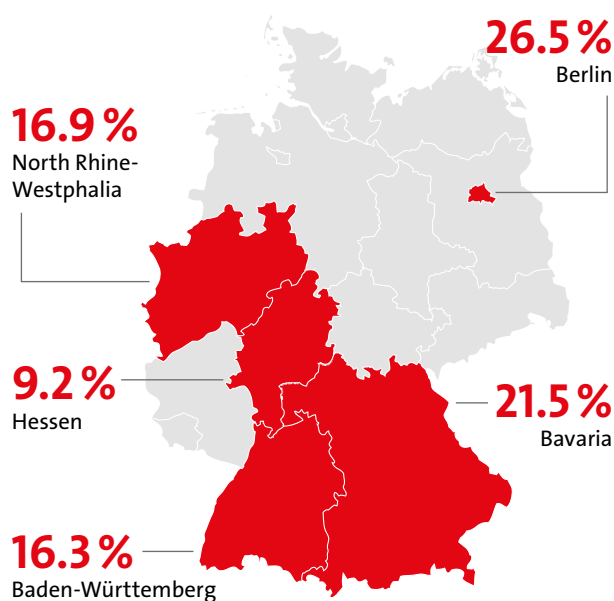


TOP CITY DESTINATIONS IN GERMANY

Berlin	26.5 %
Munich	12.3 %
Cologne	6.1 %
Frankfurt	6.0 %
Hamburg	5.0 %

55.9 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



83 per cent of all overnight stays take place in just five federal states.

REGIONAL MANAGEMENT NORTH EAST EUROPE

Two of Germany’s top ten European markets – Poland and Denmark – fall under Regional Management North East Europe. The Nordic countries are back on an upward trajectory but have not yet returned to pre-pandemic levels. The Baltic countries offer growth potential, although the region is not currently subject to any marketing. Due to the ongoing war between Russia and Ukraine, the number of overnight stays from these two markets continues to be down. Both these countries’ top destinations in Germany are northern Germany and the capital, Berlin.

12 million

overnight stays
in 2024

14 %

share of the German
inbound travel market

+1 %

year-on-year growth

HIGHLIGHTS OF THE GNTB’S REGIONAL MANAGEMENT ACTIVITIES IN 2024

Market	Market-specific campaigns and collaborations with partners		
Poland	Collaboration on a project with news portal onet.pl including implementation of an AI trip planner that accesses the GNTB Knowledge Graph		
Denmark	Sustainability initiative: Social media campaign (focusing on LinkedIn) on the topic of workations · Cooperation with media company Politiken and Danish State Railways (DSB) on a UEFA EURO 2024 project · AI-based OTC campaign with Tryp.com for the ‘Cultureland’ campaigns		
Sweden	Online marketing campaign on youvoy.se in cooperation with Deutsches Küstenland · Rail campaign with Snälltöget, Hamburg Tourismus and visitberlin · Spotify campaign on the theme of UNESCO in collaboration with Leipzig		
Norway	OTC collaboration with Kayak / Momondo on ‘Cultureland Germany’		
Finland	OTC collaboration with Kristina Travel on the topic of travelling around Germany by train · Influencer event German Days 2024		
Market	Dates	Workshops / roadshows / PR events	Location
Denmark / Sweden / Norway / Finland	22–24 October	North Europe Workshop	Fünen
Poland	6–7 November	Poland Roadshow	Warsaw / Katowice

POLAND

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+6.4 %
Rate of inflation	2024	11.53 %
Level of international travel	2023	0.6 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany	#3 Turkey
#2 UK	#4 Spain

INBOUND TOURISM TO GERMANY FROM POLAND

Overnight stays	2023	4.18 million
Travel expenditure	2023	€4.2 billion
Overnight stays	2024	4.2 million
Change	Year on year	+0.2 %
Recovery	vs. 2019	119.7 %
Source market ranking		6

PROFILE OF VISITORS TO GERMANY FROM POLAND

The region in and around the capital, Warsaw, is the biggest source market for Polish tourists travelling to Germany. The proportion of travellers coming by car is above average at 64 per cent. Almost half of all holidaymakers have been to Germany four times or more.

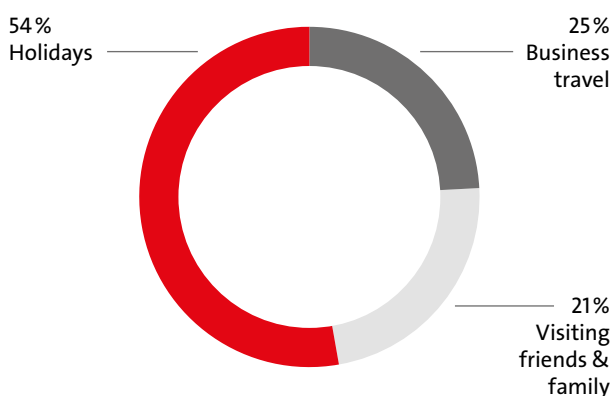
These visitors are less likely to use the internet to plan their trip. Over half of Polish tourists are most likely to gather information on Germany as a travel destination through friends and acquaintances. They book relatively spontaneously and tend to use non-commercial accommodation.

Polish tourists particularly appreciate German cities with their cultural attractions, events and shops and are very interested in German history, museums and architecture. Nature and active holidays (cycling and walking) are also very popular.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 72 % Visiting local attractions
- 62 % Going to restaurants/café's
- 41 % Strolling around/ exploring
- 35 % Visiting museums/ exhibitions
- 33 % Sampling local food and drink

TRIPS TO GERMANY BY MARKET SEGMENT

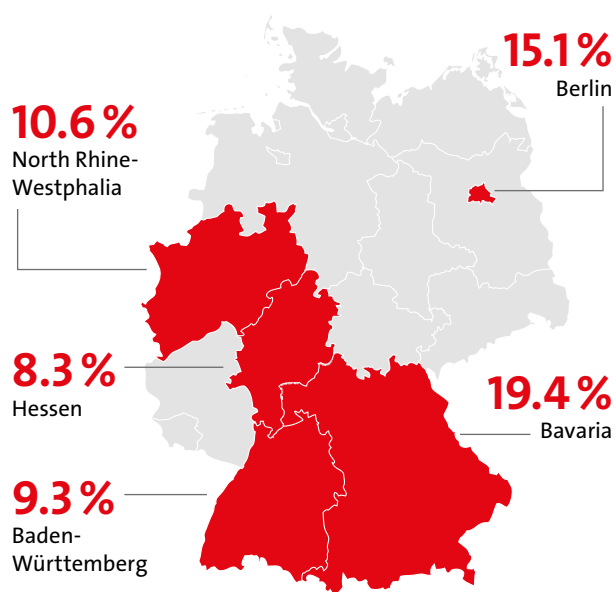


TOP CITY DESTINATIONS IN GERMANY

Berlin	15.1 %
Munich	4.2 %
Hamburg	3.3 %
Frankfurt	2.4 %
Dresden	2.3 %

27.4 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **62.6 per cent of all overnight stays** in Germany by Polish visitors in 2024.

DENMARK

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+ 2 %
Rate of inflation	2024	3.31 %
Level of international travel	2023	2.1 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany	#3 Sweden
#2 Spain	#4 Italy

INBOUND TOURISM TO GERMANY FROM DENMARK

Overnight stays	2023	3 million
Travel expenditure	2023	€2.7 billion
Overnight stays	2024	3.05 million
Change	Year on year	+ 1.6 %
Recovery	vs. 2019	89.3 %
Source market ranking		10

PROFILE OF VISITORS TO GERMANY FROM DENMARK

Most interest in trips to Germany comes from the region of Hovedstaden and the capital, Copenhagen, in addition to Jutland and southern Denmark.

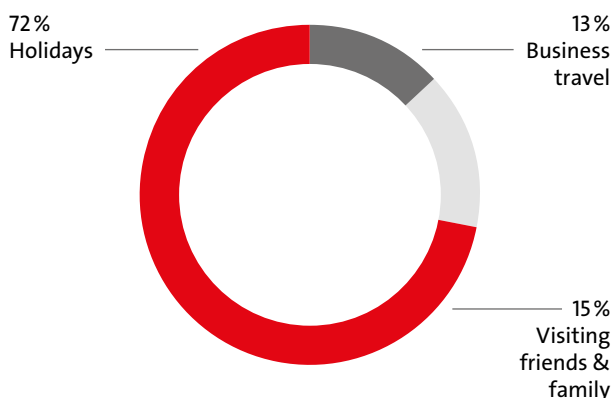
At 50, Danish tourists are around six years older than guests from other countries on average. Almost two thirds of all tourists from Denmark have been to Germany four times or more. The amount of money spent is around €13 higher than the average for other European holidaymakers at €148 per day.

Danish travellers prefer individual and flexible travel options. They are especially interested in cities and cultural experiences but also appreciate the German countryside – particularly in regions near the border in the north, such as Schleswig-Holstein, Berlin and Hamburg. The Harz mountains and alpine regions are also popular.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 82 %** Visiting local attractions
- 79 %** Going to restaurants/café
- 47 %** Visiting museums/exhibitions
- 38 %** Shopping (not for daily necessities)
- 37 %** Strolling around/exploring

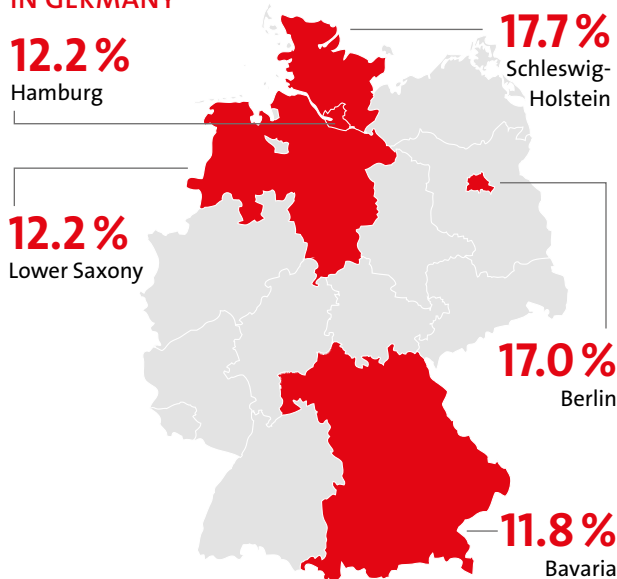
TRIPS TO GERMANY BY MARKET SEGMENT



TOP CITY DESTINATIONS IN GERMANY

Berlin	17.0 %
Hamburg	12.2 %
Munich	3.3 %
Goslar	1.8 %
Frankfurt	1.5 %
35.8 %	
of all overnight stays in the top 5 cities	

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **70.9 per cent of all overnight stays** in Germany by Danish visitors in 2024.

REGIONAL MANAGEMENT SOUTH EAST EUROPE

Regional Management South East Europe covers very different countries. Alongside the established top ten market of Austria with its solid rates of growth, the Balkan countries are becoming more important as source markets thanks to their buoyant economic expansion. Increased purchasing power is boosting interest in travel in these high-potential growth markets. Opportunities lie in sustainable and innovative travel offers and in digital projects for reaching the market directly.

12 million

overnight stays
in 2024

14 %

share of the German
inbound travel market

+ 5 %

year-on-year growth

HIGHLIGHTS OF THE GNTB'S REGIONAL MANAGEMENT ACTIVITIES IN 2024

Market	Market-specific campaigns and collaborations with partners
Austria	Sales cooperation with ÖBB Rail Tours · Open Data project with Insiderei, a special-interest lifestyle magazine for new hotels and local recommendations
Balkans	Partner country at the iMapp Festival in Bucharest · Influencer trips with Value Retail, Ruhr Tourismus GmbH and Tourismus+ Congress GmbH Frankfurt am Main · Press event in cooperation with visitBerlin and Kulturprojekte Berlin to mark the 35th anniversary of the fall of the Berlin Wall
Hungary	Marketing campaign for UEFA EURO 2024
Croatia	Press event in conjunction with visitBerlin and Kulturprojekte Berlin on UEFA EURO 2024 · Press trip with Leipzig Tourismus und Marketing GmbH
Slovenia	Live event, press event and OOH campaign '150 United Buddy Bears visit Ljubljana'

Market	Dates	Workshops / roadshows / PR events	Location
Czech Republic	15 March 14 November	B2B workshop Welcome tour for Chemnitz, 2025 European Capital of Culture	Prague Prague
Austria	25–26 September 7 November	Austria Roadshow Welcome tour for Chemnitz, 2025 European Capital of Culture	Vienna / Salzburg Vienna

AUSTRIA

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+3.8 %
Rate of inflation	2024	7.81%
Level of international travel	2023	2.1 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany	#3 Croatia
#2 Italy	#4 Spain

INBOUND TOURISM TO GERMANY FROM AUSTRIA

Overnight stays	2023	4.2 million
Travel expenditure	2023	€2.9 billion
Overnight stays	2024	4.42 million
Change	Year on year	+4.8 %
Recovery	vs. 2019	101.8 %
Source market ranking		5

PROFILE OF VISITORS TO GERMANY FROM AUSTRIA

Demand for trips to Germany originates mainly from the capital, Vienna, followed by Tyrol, Upper Austria and Steiermark.

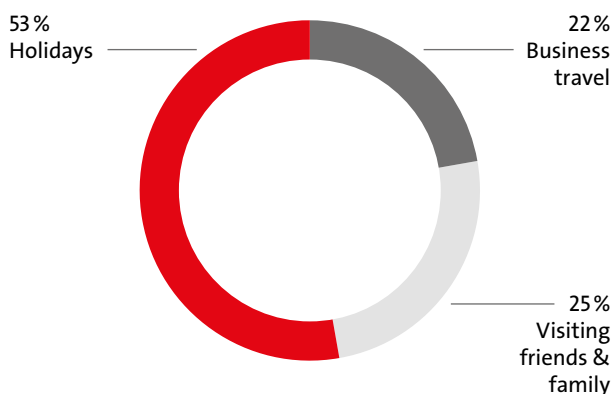
Austrians plan further ahead and make more frequent but shorter trips to Germany. The proportion of mini-breaks of up to three nights stands at 52 per cent. At 4.7 days, the average length of stay is around 1.8 days shorter than the European average. The proportion of repeat visitors (at least four trips) is very high at 58 per cent.

During their visit to Germany, 66 per cent of Austrians stay in hotels – especially in rural areas (towns with a population of less than 20,000).

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 79 % Going to restaurants/cafés
- 76 % Visiting local attractions
- 50 % Strolling around/ exploring
- 43 % Shopping (not for daily necessities)
- 39 % Sampling local food and drink

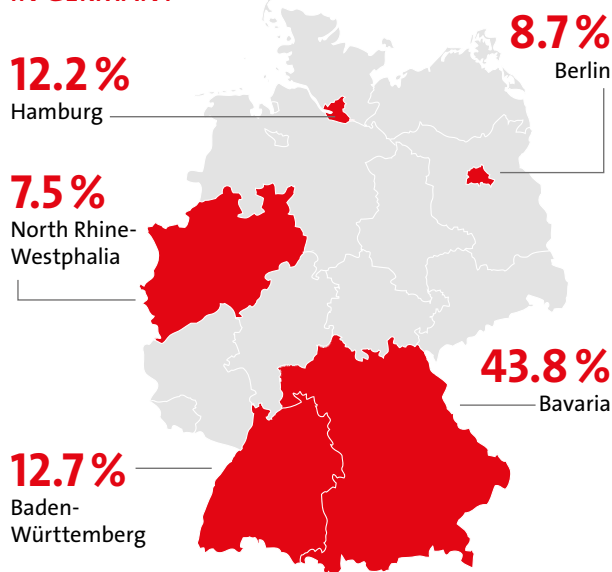
TRIPS TO GERMANY BY MARKET SEGMENT



TOP CITY DESTINATIONS IN GERMANY

Munich	2.2 %
Berlin	8.7 %
Hamburg	6.6 %
Frankfurt	2.1 %
Nuremberg	1.9 %
31.6 % of all overnight stays in the top 5 cities	

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **79.4 per cent of all overnight stays** in Germany by Austrian visitors in 2024.

CZECH REPUBLIC

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+3.7%
Rate of inflation	2024	10.66%
Level of international travel	2023	1.2 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany	#3 Italy
#2 Austria	#4 Croatia

INBOUND TOURISM TO GERMANY FROM THE CZECH REPUBLIC

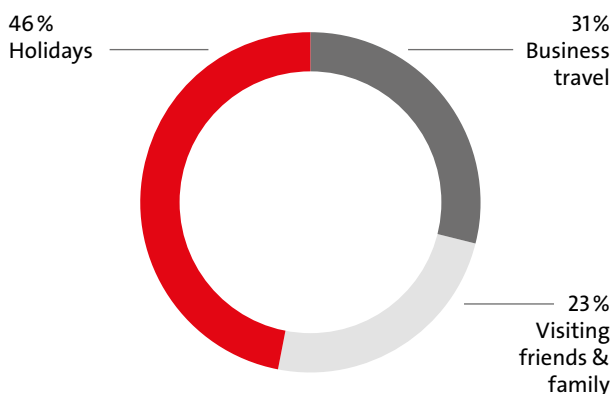
Overnight stays	2023	1.42 million
Travel expenditure	2023	€1 billion
Overnight stays	2024	1.46 million
Change	Year on year	+3.1%
Recovery	vs. 2019	105.3%
Source market ranking		14

PROFILE OF VISITORS TO GERMANY FROM THE CZECH REPUBLIC

Demand for trips to Germany primarily comes from the capital, Prague. Two thirds of visitors use their own car to holiday in Germany, which might be booked spontaneously or at short notice. An above-average number of people from the Czech Republic (11 per cent) opt for lake and river-based holidays – more than twice the European average. At 41, holidaymakers from the Czech Republic are three years younger than those from the rest of Europe on average.

Interest in holidays on the Baltic and North Sea coasts as an alternative to beach holidays in southern Europe is growing in the Czech market.

TRIPS TO GERMANY BY MARKET SEGMENT

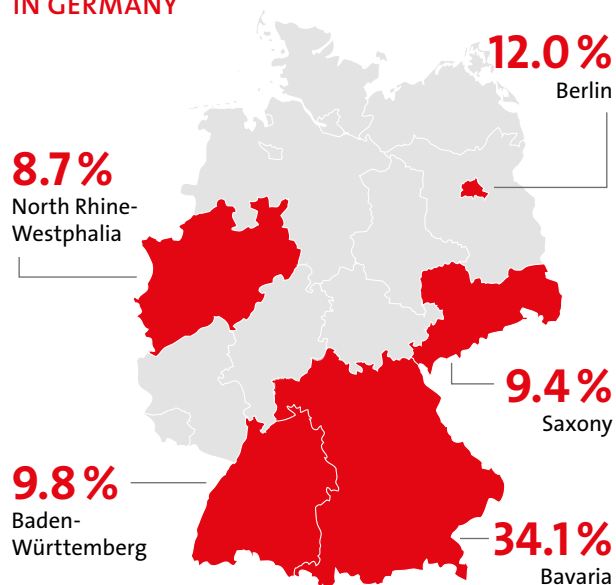


TOP CITY DESTINATIONS IN GERMANY

Berlin	12.1%
Munich	7.1%
Dresden	3.3%
Hamburg	3.1%
Cologne	3.1%

28.6 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **73.9 per cent of all overnight stays** in Germany by Czech visitors in 2024.

BALKANS

Source market at a glance

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

The regional office based in Belgrade serves six extremely promising markets in the Balkans. Economic growth is surging in the region, which is seeing a rising affinity with sustainable tourism. The positive economic momentum is boosting purchasing power and forging interest in travel among the region's target groups.

PROFILE OF VISITORS TO GERMANY

ROMANIA

The average age of Romanian holidaymakers in Germany is 39, which is considerably lower than the European average. 47 per cent arrive by plane and Romanians stay in Germany for an average of 10.5 days.

The top 5 federal states accounted for **78.7 per cent of all overnight stays** in 2024.

CROATIA

Holidaymakers from Croatia frequently travel around Germany in small groups of three to four. The proportion of arrivals by coach is 19 per cent, or almost three times higher, than for Europe as a whole. Private trips for a special occasion (e.g. wedding, birthday) account for 15 per cent of all holiday travel to Germany.

The top 5 federal states accounted for **78.7 per cent of all overnight stays** in 2024.

BULGARIA

The average age of Bulgarian holidaymakers in Germany is 39. They are five years younger on average than all other European visitors. 59 per cent arrive by plane and Bulgarians spend an average of 8.6 days in Germany.

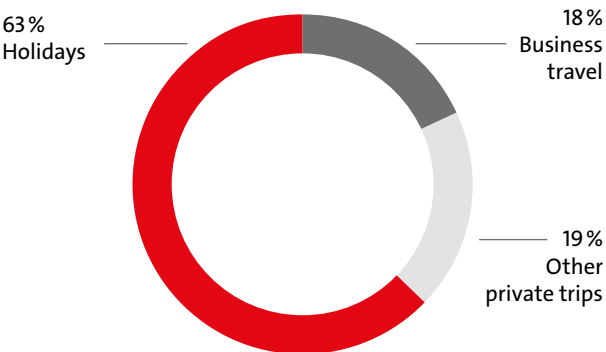
The top 5 federal states accounted for **75.4 per cent of all overnight stays** in 2024.

ROMANIA – THE DATA

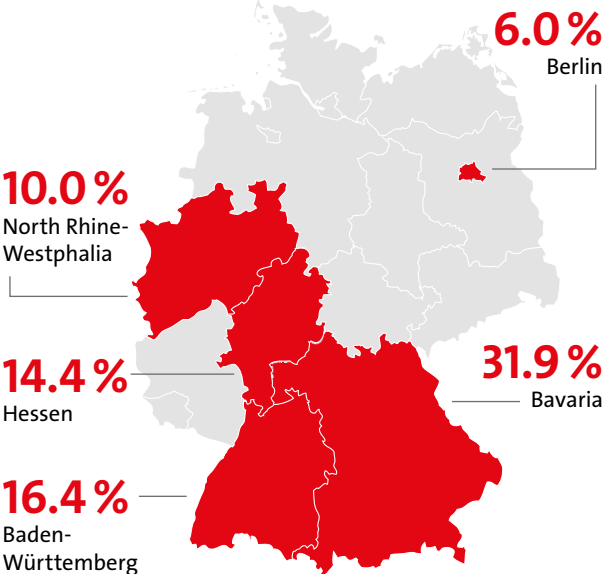
GDP	2023/24	+ 8.4 %
Rate of inflation	2023	+ 10.7 %
Level of international travel	2023	0.5 trips per person/year
Overnight stays	2023	1.37 million
Travel expenditure	2023	€0.5 billion
Overnight stays	2024	1.4 million
Change	2023/24	+ 2.1 %

Germany ranks number **3** among the most popular international destinations for Romanians.

TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY



CROATIA – THE DATA

GDP	2023/24	+6.4 %
Rate of inflation	2023	+7.94 %
Level of international travel	2023	0.8 trips per person/year
Overnight stays	2023	0.58 million
Travel expenditure	2023	€0.6 billion
Overnight stays	2024	0.55 million
Change	2023/24	–4 %

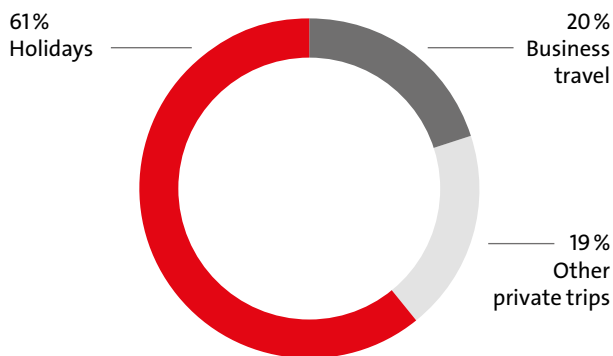
Germany ranks number **1** among the most popular international destinations for Croatians.

BULGARIA – THE DATA

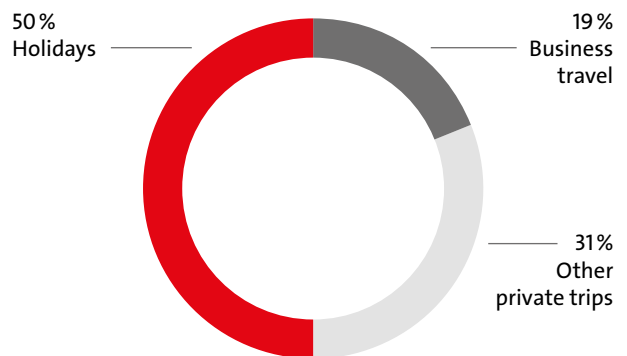
GDP	2023/24	+1.7 %
Rate of inflation	2023	+9.4 %
Level of international travel	2023	0.5–1.2 trips per person/year
Overnight stays	2023	0.46 million
Travel expenditure	2023	€0.3 billion
Overnight stays	2024	0.51 million
Change	2023/24	+10.4 %

Germany ranks number **3** among the most popular international destinations for Bulgarians.

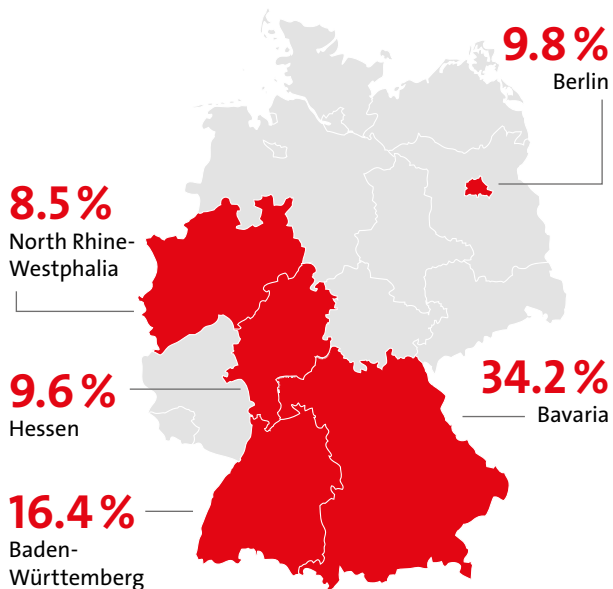
TRIPS TO GERMANY BY MARKET SEGMENT



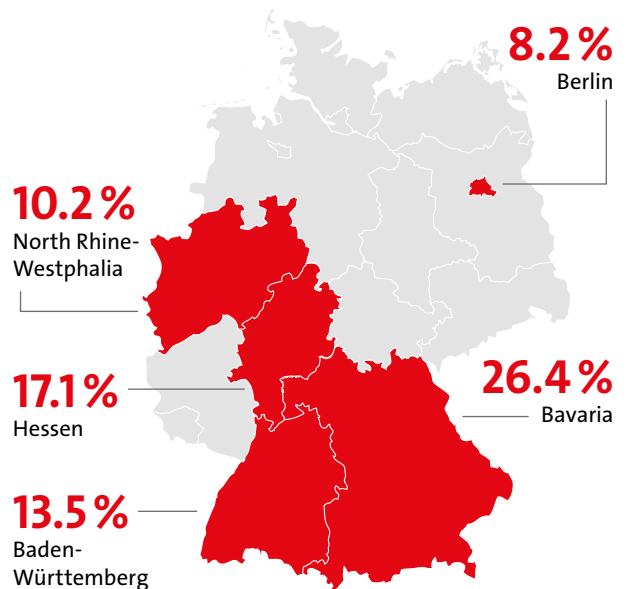
TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY



MOST POPULAR DESTINATIONS IN GERMANY



REGIONAL MANAGEMENT SOUTH WEST EUROPE

Four of Germany’s top ten European markets fall under Regional Management South West Europe. All countries contributed to the growth in inbound tourism to Germany in 2024, albeit to a differing extent. Southern Germany and the capital, Berlin, are the top destinations for all countries in this region.

17 million

overnight stays
in 2024

20 %

share of the German
inbound travel market

+4 %

year-on-year growth

HIGHLIGHTS OF THE GNTB’S REGIONAL MANAGEMENT ACTIVITIES IN 2024

Market	Market-specific campaigns and collaborations with partners
Spain	Joint social media campaign #GermanyByTrain with Deutsche Bahn · Blogger project Travelinspires in collaboration with Historic Highlights of Germany · Romantic Road social media campaign with RAAC-Travel · Experts’ trip for accessible tourism
Spain / France	Immersive UNESCO World Heritage exhibition in shopping centres
Switzerland	Multi-sensory live experience with the ‘Stay longer’ bench at Zurich main train station
Italy	Romantic Road media collaboration with Touring Club Italiano · Joint social media campaign #GermanyByTrain with Deutsche Bahn · Influencer project in cooperation with Lufthansa, Fly & Rail familiarisation trips · Geo-localised podcast series on UNESCO travel routes
France	Rail campaign in cooperation with DB-SNCF and six German partners · ‘Highlights & insider tips’ media campaign for advertising lesser known destinations, e.g. Saxony-Anhalt or Mecklenburg-Vorpommern · Collaboration with Atout France

Market	Dates	Workshops / roadshows / PR events	Location
Switzerland	16 May 31 October	Germany Workshop Welcome tour for Chemnitz, 2025 European Capital of Culture	Zurich Zurich
Italy	1–2 October	Workshop Germania	Briosco
Spain	16–18 October	Meet Germany workshop	Madrid
France	19–20 November	Workshop	Paris

SPAIN

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+9.5 %
Rate of inflation	2024	3.53 %
Level of international travel	2023	0.6 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 France	#4 UK
#2 Italy	#5 Germany
#3 Portugal	

INBOUND TOURISM TO GERMANY FROM SPAIN

Overnight stays	2023	2.5 million
Travel expenditure	2023	€2.3 billion
Overnight stays	2024	2.7 million
Change	Year on year	+7.7 %
Recovery	vs. 2019	83 %
Source market ranking		11

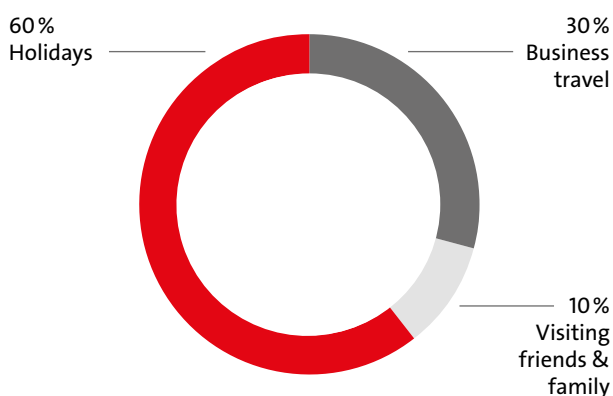
PROFILE OF VISITORS TO GERMANY FROM SPAIN

Madrid and the densely populated, economically dominant coastal regions along the Mediterranean Sea are the biggest source markets for inbound tourism to Germany. With an average age of 39, Spanish holidaymakers in Germany are relatively young. In 2024, almost half visited Germany for the first time. They tend more than other visitors to book flights through a tour operator well in advance. City breaks with hotel accommodation are particularly popular. The amount of money spent is around €17 higher than that of the average European holidaymaker at €152 per day.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 80 %** Visiting local attractions
- 62 %** Going to restaurants/café
- 41 %** Sampling local food and drink
- 40 %** Guided tours
- 38 %** Strolling around/ exploring

TRIPS TO GERMANY BY MARKET SEGMENT

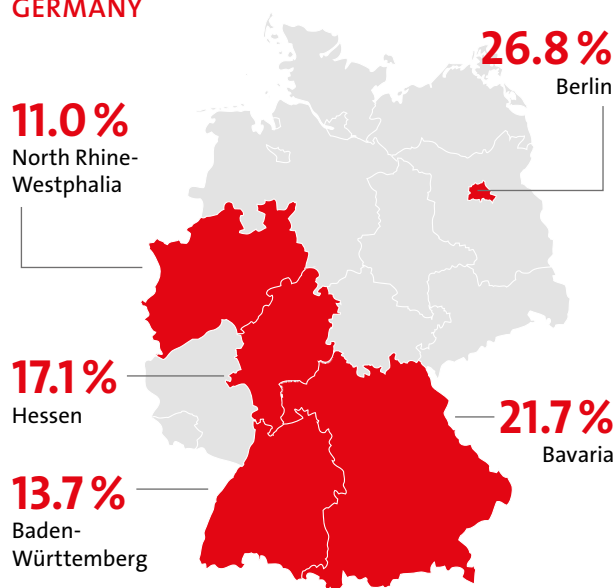


TOP CITY DESTINATIONS IN GERMANY

Berlin	26.8 %
Munich	11.5 %
Frankfurt	6.3 %
Hamburg	5.4 %
Düsseldorf	3.4 %

53.4 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **83 per cent of all overnight stays** in Germany by Spanish visitors in 2024.

SWITZERLAND

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+ 6.5 %
Rate of inflation	2024	2.14 %
Level of international travel	2023	3.1 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany	#3 Italy
#2 France	#4 Spain

INBOUND TOURISM TO GERMANY FROM SWITZERLAND

Overnight stays	2023	6.8 million
Travel expenditure	2023	€7 billion
Overnight stays	2024	6.9 million
Change	Year on year	+ 2.3 %
Recovery	vs. 2019	97.3 %
Source market ranking		3

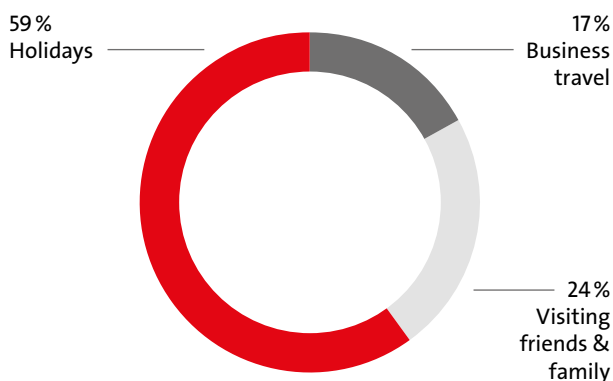
PROFILE OF VISITORS TO GERMANY FROM SWITZERLAND

Most travellers to Germany come from the German-speaking parts of Switzerland near the border, including Zurich, Bern, Aargau and St. Gallen, as well as from Geneva. They are 48 years old on average. More than two thirds of them have been to Germany at least four times. Most Swiss people book their holidays individually. One in five arrives by train and spends their holiday in rural regions – the area around Europa-Park in Rust is very popular, as are much smaller places in the Black Forest where they can enjoy nature and wellness facilities. Holidaymakers from Switzerland spend €192 per day, roughly €57 more than other European visitors.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 78 % Going to restaurants/cafés
- 73 % Visiting local attractions
- 61 % Strolling around/ exploring
- 45 % Sampling local food and drink
- 41 % Shopping (not for daily necessities)

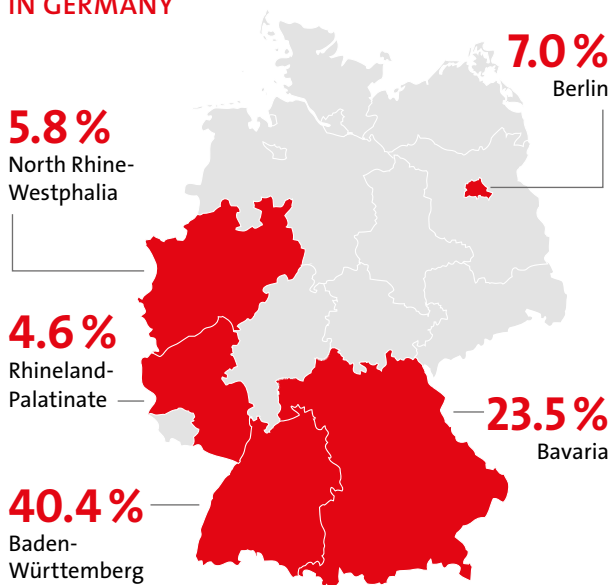
TRIPS TO GERMANY BY MARKET SEGMENT



TOP CITY DESTINATIONS IN GERMANY

Berlin	7.0 %
Munich	6.9 %
Hamburg	4.4 %
Frankfurt	2.4 %
Stuttgart	2.2 %
22.9 %	
of all overnight stays in the top 5 cities	

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **81.2 per cent of all overnight stays** in Germany by Swiss visitors in 2024.

FRANCE

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+4.7 %
Rate of inflation	2024	4.88 %
Level of international travel	2023	0.8 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Spain	#3 Italy
#2 Germany	#4 UK

INBOUND TOURISM TO GERMANY FROM FRANCE

Overnight stays	2023	3.5 million
Travel expenditure	2023	€3.4 billion
Overnight stays	2024	3.7 million
Change	Year on year	+4.8 %
Recovery	vs. 2019	96.5 %
Source market ranking		7

PROFILE OF VISITORS TO GERMANY FROM FRANCE

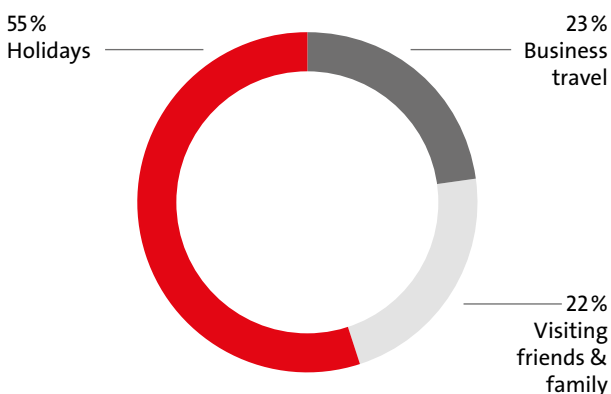
The biggest source regions for France's outbound tourism to Germany are the Paris area and the industrial regions of Grand Est close to the border, including Alsace and Lorraine.

One in every ten holidays in Germany made by visitors from France is to a family attraction. 22 per cent of French visitors to Germany undertake a multi-destination tour, with their trip often tailored to a particular theme, such as wine, castles, or history. 16 per cent travel by train. Staying in holiday homes/apartments is very popular. Holidaymakers from France spend €214 per day, roughly €79 more than other European visitors.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 76 %** Visiting local attractions
- 70 %** Going to restaurants/café's
- 50 %** Strolling around/ exploring
- 42 %** Sampling local food and drink
- 34 %** Visiting museums/ exhibitions

TRIPS TO GERMANY BY MARKET SEGMENT

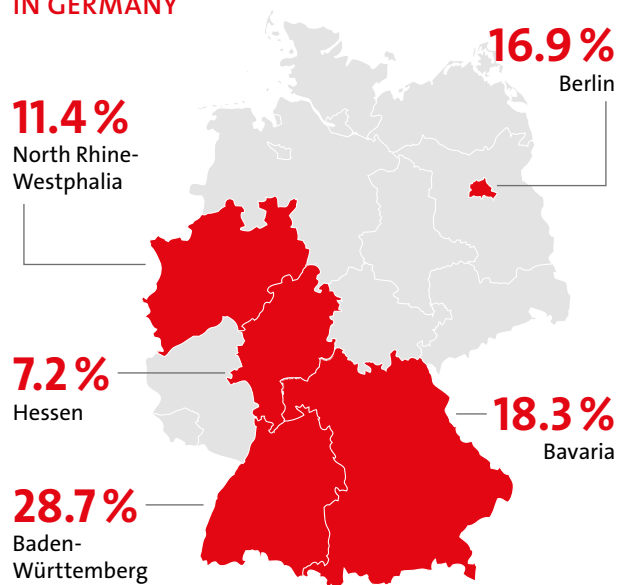


TOP CITY DESTINATIONS IN GERMANY

Berlin	16.9 %
Munich	7.8 %
Frankfurt	4.4 %
Hamburg	3.8 %
Cologne	2.9 %

35.8 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **82.4 per cent of all overnight stays** in Germany by French visitors in 2024.

ITALY

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+ 5.4 %
Rate of inflation	2024	5.62 %
Level of international travel	2023	0.5 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Spain	#3 Germany
#2 France	#4 Greece

INBOUND TOURISM TO GERMANY FROM ITALY

Overnight stays	2023	3.4 million
Travel expenditure	2023	€2.8 billion
Overnight stays	2024	3.5 million
Change	Year on year	+ 4.6 %
Recovery	vs. 2019	84.5 %
Source market ranking		8

PROFILE OF VISITORS TO GERMANY FROM ITALY

The economically stronger north, with its major urban centres in Lombardy, Lazio, Tuscany, Veneto, Trentino and Emilia-Romagna, is the most important Italian source region for Destination Germany.

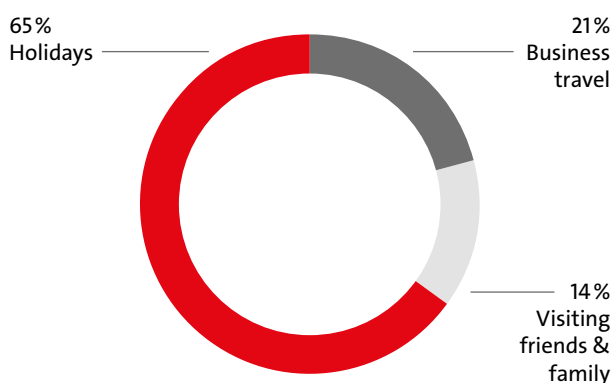
Many first-time visitors (35 per cent) book their holiday to Germany relatively spontaneously and tend to fly.

Visiting cities, cultural events and places of interest are the biggest reasons to travel for Italians – focused on tailored itineraries shared with people who have similar interests. Accordingly, city breaks (52 per cent) and multi-destination tours (25 per cent) are more popular than for other Europeans.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 80 % Visiting local attractions
- 69 % Going to restaurants/café
- 45 % Strolling around/ exploring
- 43 % Sampling local food and drink
- 37 % Visiting museums/ exhibitions

TRIPS TO GERMANY BY MARKET SEGMENT

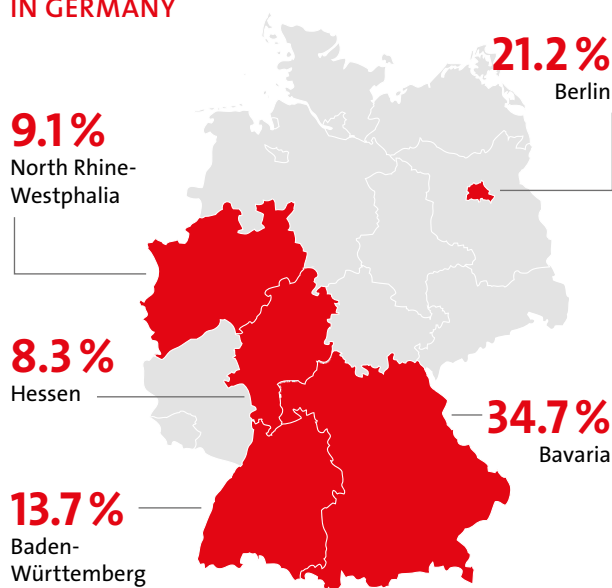


TOP CITY DESTINATIONS IN GERMANY

Berlin	21.2 %
Munich	16.6 %
Frankfurt	5.4 %
Hamburg	3.2 %
Nuremberg	2.7 %

49.2 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **87 per cent of all overnight stays** in Germany by Italian visitors in 2024.

REGIONAL MANAGEMENT AMERICAS/ISRAEL

The dominant market for Regional Management Americas/Israel is the US. Close transatlantic relationships are carefully maintained – with the result that the US expanded its position as the biggest overseas market for inbound tourism to Germany once again in 2024. Worldwide, the US ranked number 2 among all source markets for German inbound tourism at the end of the year. In Canada, outbound tourism was concentrated on the economic powerhouses of Toronto, Montreal and Vancouver, which is also where most Canadian travelers to Germany come from. Outbound tourism from Israel was down as a result of the war in the Middle East.

10 million

overnight stays
in 2024

12 %

share of the German
inbound travel market

+9 %

year-on-year growth

HIGHLIGHTS OF THE GNTB'S REGIONAL MANAGEMENT ACTIVITIES IN 2024

Market	Market-specific campaigns and collaborations with partners		
USA	Campaign with Atlas Obscura in cooperation with Lufthansa · MC Travel Leaders campaign · Tour for journalists and influencers with Historic Highlights of Germany · Marketing collaboration with Smithsonian · Travel Leaders webinars with Hopper		
USA/Canada	Collaboration with OTA Hopper and Capital One on the theme of sustainable travel		
Market	Dates	Workshops / roadshows / PR events	Location
USA/Canada	15–20 September	Destination Germany marketplace and travel advisors' reception	New Jersey, Houston / Montreal

USA

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+ 6.6 %
Rate of inflation	2024	4.12 %
Level of international travel	2023	0.4 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

- | | |
|-----------|-------------------|
| #1 UK | #3 Italy |
| #2 France | #4 Germany |

INBOUND TOURISM TO GERMANY FROM THE US

Overnight stays	2023	6.5 million
Travel expenditure	2023	€8.8 billion
Overnight stays	2024	7.24 million
Change	Year on year	+ 10.7 %
Recovery	vs. 2019	103.8 %
Source market ranking		2

PROFILE OF VISITORS TO GERMANY FROM THE US

The US market was very strong in 2024, rising to become the number 2 source market for inbound tourism to Germany. Americans spent €10.4 billion on trips to Germany in 2024, the most of any source market.

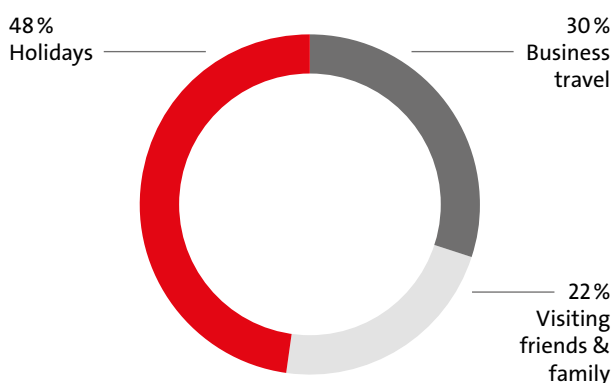
Online surveys point to strong interest in Destination Germany from Texas, from the East Coast states of South Carolina, New York, and Florida, and from California on the West Coast.

36 per cent of Americans visit cities in Germany, a further 33 per cent tour around multiple destinations. With an average stay of 8.8 nights, their trips to Germany are slightly shorter than those of other overseas guests. However, they spend €344 per day, which is around €21 more than other visitors from overseas.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 90 %** Visiting local attractions
- 73 %** Going to restaurants/café
- 56 %** Guided tours
- 51 %** Visiting museums/exhibitions
- 51 %** Sampling local food and drink

TRIPS TO GERMANY BY MARKET SEGMENT

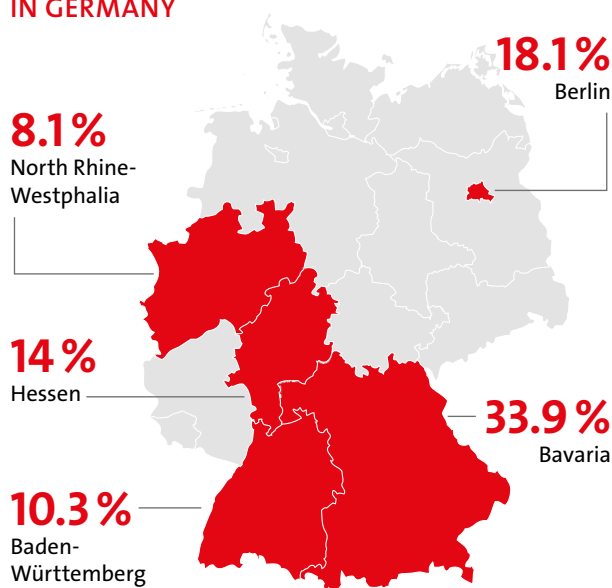


TOP CITY DESTINATIONS IN GERMANY

Munich	20.5 %
Berlin	18.1 %
Frankfurt	10.6 %
Hamburg	3.7 %
Düsseldorf	3.3 %

56.2 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **84.5 per cent of all overnight stays** in Germany by US visitors in 2024.

ISRAEL

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+3.6 %
Rate of inflation	2024	4.23 %
Level of international travel	2023	0.7 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 UK	#3 Italy
#2 France	#4 Germany

INBOUND TOURISM TO GERMANY FROM ISRAEL

Overnight stays	2023	0.66 million
Travel expenditure	2023	€0.61 billion
Overnight stays	2024	0.6 million
Change	Year on year	–6.6 %
Recovery	vs. 2019	69.3 %
Source market ranking		29

PROFILE OF VISITORS TO GERMANY FROM ISRAEL

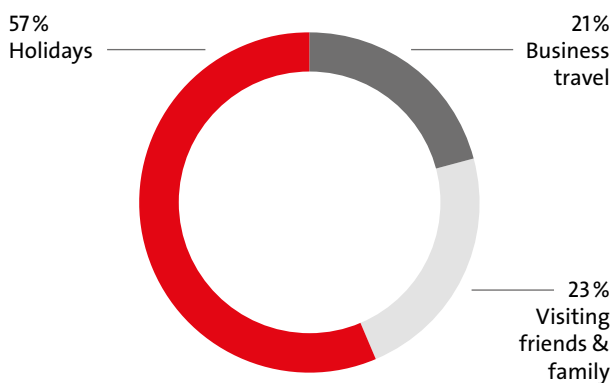
Most online searches for hotels in Germany come from the central region of Israel around the capital, Tel Aviv, and the spiritual centre of Jerusalem.

The recovery of the source market of Israel after the pandemic continues to be held back by the ongoing war in the Middle East.

97 per cent of Israelis book their trip to Germany in advance. Germany's varied tourist offering, including cultural tourism, city breaks, shopping trips, family holidays and family attractions, are especially popular with Israeli tourists.

The average Israeli spend is €240 per day. The average length of stay is 10.1 nights. Roughly a third of visitors from Israel stay in holiday apartments, on boats, or in guesthouses rather than in hotels.

TRIPS TO GERMANY BY MARKET SEGMENT

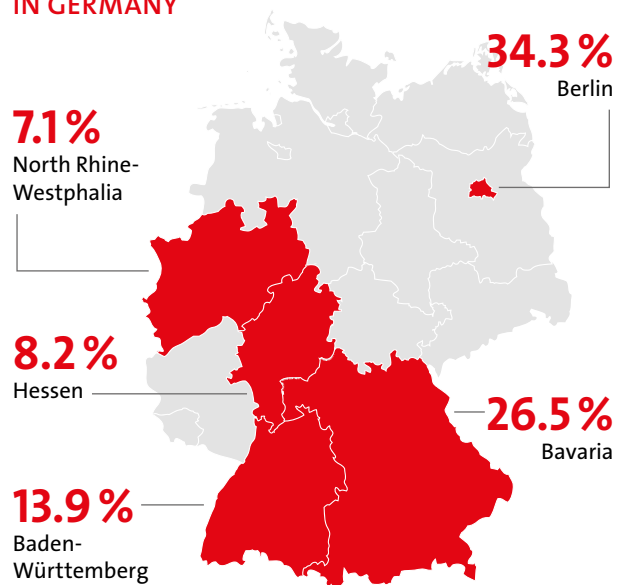


TOP CITY DESTINATIONS IN GERMANY

Berlin	34.3 %
Munich	15.0 %
Frankfurt	6.2 %
Düsseldorf	2.4 %
Hamburg	2.2 %

60.2 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **90 per cent of all overnight stays** in Germany by Israeli visitors in 2024.

REGIONAL MANAGEMENT ASIA

The countries covered by Regional Management Asia returned to their pre-pandemic growth trajectory in 2024, registering the strongest relative year-on-year growth. They made up around 10 per cent of inbound tourism to Germany once again. The biggest contributor was the Chinese market. Digital is key to Destination Germany’s success here, as the region’s consumers are avid users of digital services, which need to be backed up by corresponding offerings.

8 million

overnight stays
in 2024

10 %

share of the German
inbound travel market

+ 9 %

year-on-year growth

HIGHLIGHTS OF THE GNTB’S REGIONAL MANAGEMENT ACTIVITIES IN 2024

Market	Market-specific campaigns and collaborations with partners		
China	MoU signed and OTA campaign with Ctrip (Trip.com) · Festive campaign mit Alipay · Joint Little Red Book campaign with Lufthansa · Influencer trips · Cross-media ‘Stay longer’ campaign		
India	Open Data project with global travel platform tbo.com · Trade event with Lufthansa · Cross-channel influencer campaign ‘Go slow, go Germany’		
Japan	Neuschwanstein Castle snow sculpture at Sapporo Snow Festival · Trade event marking 50 years of the GNTB in Japan		
Arab Gulf States	‘Stay longer’ campaign with Spotify		
Market	Dates	Workshops / roadshows / PR events	Location
Arab Gulf States	4–5 May 6–9 May 27 October– 1 November	Discover Europe travel summit Arabian Travel Market 2024 GCC Roadshow	Dubai Dubai Jeddah, Kuwait, Doha, Muscat, Dubai
China	27–29 May 11–14 November	ITB China China Roadshow	Shanghai Beijing, Shanghai, Chengdu, Guangzhou
Japan	21–24 October	‘Off the beaten track’ roadshow	Tokyo
India	4–8 November	2024 India Roadshow	New Delhi, Mumbai, Hyderabad

CHINA

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+ 2.7 %
Rate of inflation	2024	0.23 %
Level of international travel	2023	0.025 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany	#3 Italy
#2 France	#4 Switzerland

INBOUND TOURISM TO GERMANY FROM CHINA

Overnight stays	2023	1.3 million
Travel expenditure	2023	€3 billion
Overnight stays	2024	1.8 million
Change	Year on year	+40.5 %
Recovery	vs. 2019	63 %
Source market ranking		12

PROFILE OF VISITORS TO GERMANY FROM CHINA

The proportion of business trips in inbound travel to Germany from China is above average. Holidaymakers book 99 per cent of their trips in advance, opting for multi-destination tours (42 per cent) and visits to cities (24 per cent). Consumer demand continues to shift towards smaller group travel or independent travel with novel experiences. 83 per cent of Chinese visitors stay in hotels.

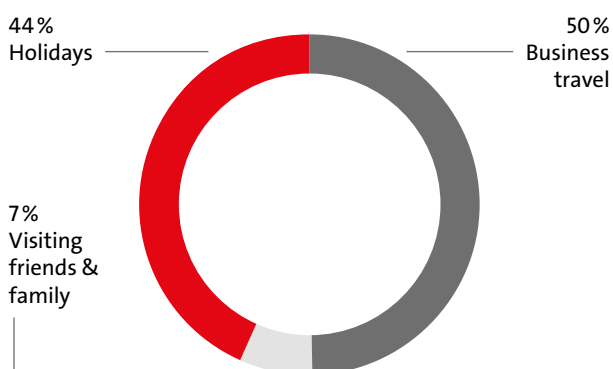
The improved visa situation will allow for a further sharp increase in visitors in 2025.

China is the number 1 source market for Germany as measured by daily spend. Travellers from China spend an average of €485 per day, roughly €162 more than other overseas visitors.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 89 % Visiting local attractions
- 70 % Going to restaurants/café's
- 58 % Guided tours
- 54 % Visiting museums/exhibitions
- 44 % Shopping (not for daily necessities)

TRIPS TO GERMANY BY MARKET SEGMENT

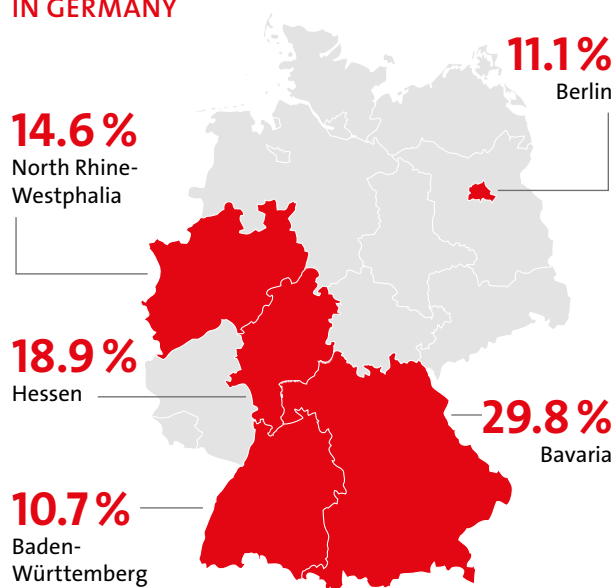


TOP CITY DESTINATIONS IN GERMANY

Munich	15.7 %
Frankfurt	13.1 %
Berlin	11.1 %
Cologne	4.6 %
Düsseldorf	4.2 %

48.7 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **85.1 per cent of all overnight stays** in Germany by Chinese visitors in 2024.

INDIA

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	+ 9.6 %
Rate of inflation	2024	5.65 %
Level of international travel	2023	0.014 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

#1 UK	#3 Germany
#2 France	#4 Italy

INBOUND TOURISM TO GERMANY FROM INDIA

Overnight stays	2023	0.83 million
Travel expenditure	2023	€0.9 billion
Overnight stays	2024	0.9 million
Change	Year on year	+ 8.6 %
Recovery	vs. 2019	93.4 %
Source market ranking		19

PROFILE OF VISITORS TO GERMANY FROM INDIA

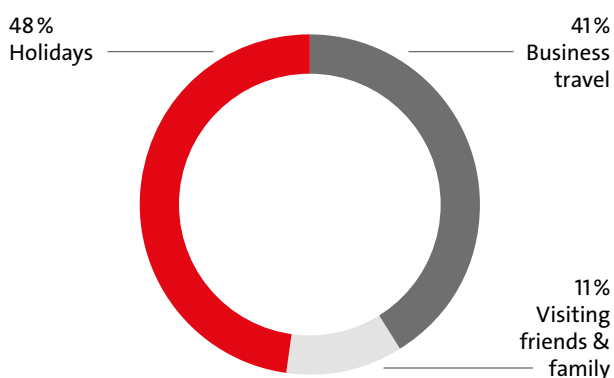
The Indian market has a burgeoning middle class, rising purchasing power and growing demand for unique travel experiences. Maharashtra with the metropolis of Mumbai, the region surrounding the capital, Delhi, and Karnataka state with its capital of Bangalore are the leading source regions in India for inbound tourism to Germany.

The proportion of business travel to Germany is above average at 42 per cent. 99 per cent of holidaymakers book their trips in advance, with 39 per cent opting for multi-destination tours and 28 per cent for visits to cities. The proportion of visitors staying in hotels is slightly above average at 70 per cent.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 86 %** Visiting local attractions
- 71 %** Going to restaurants/café
- 51 %** Guided tours
- 49 %** Visiting museums/exhibitions
- 42 %** Shopping (not for daily necessities)

TRIPS TO GERMANY BY MARKET SEGMENT

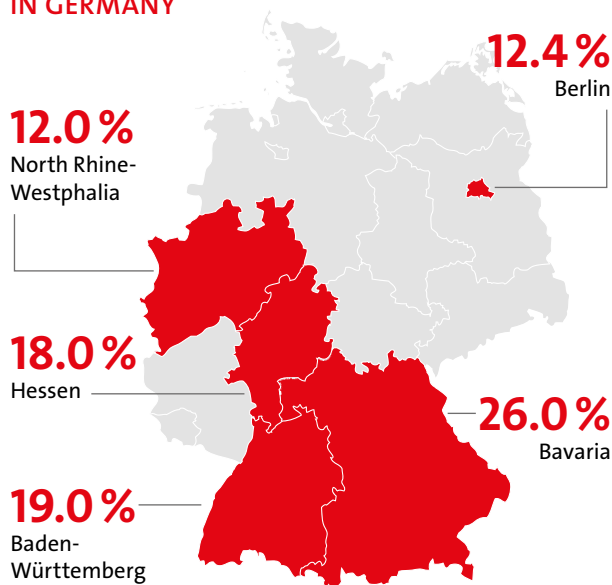


TOP CITY DESTINATIONS IN GERMANY

Munich	15.2 %
Berlin	12.4 %
Frankfurt	11.8 %
Stuttgart	4.1 %
Hamburg	3.7 %

47.2 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **87.5 per cent of all overnight stays** by Indian visitors in Germany in 2024.

ARAB GULF STATES

Source market at a glance

Kuwait, Saudi Arabia, United Arab Emirates, Bahrain, Oman, Qatar

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MOST POPULAR TRAVEL DESTINATIONS

- #1 Turkey
- #2 France
- #3 UK
- #4 **Germany**

INBOUND TOURISM TO GERMANY FROM THE ARAB GULF STATES

Overnight stays	2023	1.3 million
Travel expenditure	2023	€2.3 billion
Overnight stays	2024	1.2 million
Change	Year on year	– 7.5 %
Recovery	vs. 2019	74.8 %
Source market ranking		18

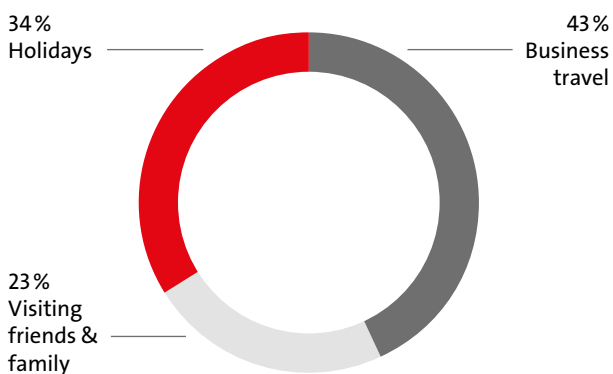
PROFILE OF VISITORS TO GERMANY FROM THE ARAB GULF STATES

Business travellers make up 43 per cent of visitors from the UAE, which is above average. 99 per cent of visitors coming to Germany on holiday book their trips in advance, with 28 per cent choosing to visit cities and 24 per cent opting for multi-destination tours. Holidaymakers from the UAE spend an average of €409 per day, roughly €86 more than other overseas visitors. The UAE is the number 3 source market for Germany in terms of daily spend. The very high travel expenditure correlates with a discerning target demographic that values innovative and tailored offerings.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

- 89 %** Visiting local attractions
- 70 %** Going to restaurants/café
- 58 %** Guided tours
- 54 %** Visiting museums/exhibitions
- 44 %** Shopping (not for daily necessities)

TRIPS TO GERMANY BY MARKET SEGMENT

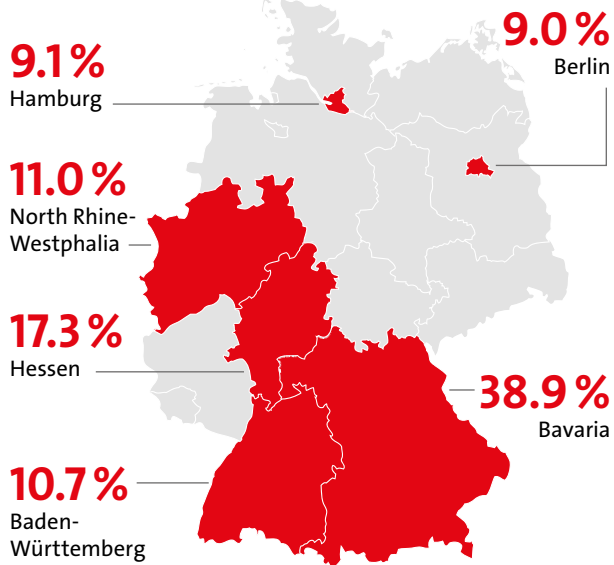


TOP CITY DESTINATIONS IN GERMANY

Munich	29.2 %
Frankfurt	10.3 %
Hamburg	9.1 %
Berlin	9.0 %
Düsseldorf	5.1 %

62.6 %
of all overnight
stays in the
top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **85.3 per cent of all overnight stays** in Germany by visitors from the Arab Gulf States in 2024.

JAPAN

Source market at a glance

Sources: German Federal Statistical Office,
IPK International 2024/2025 Quality Monitor survey of
the German tourism industry.
1 May 2022–31 October 2024

MACROECONOMIC DATA

GDP	2023/24	– 3.4 %
Rate of inflation	2024	3.27 %
Level of international travel	2023	0.11 trips per person/year

MOST POPULAR TRAVEL DESTINATIONS

- | | |
|----------|-------------------|
| #1 Italy | #3 France |
| #2 Spain | #4 Germany |

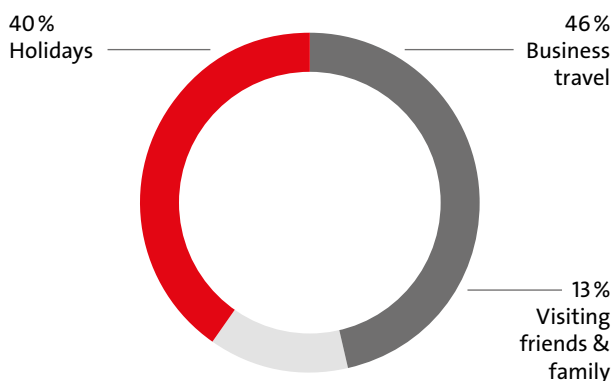
INBOUND TOURISM TO GERMANY FROM JAPAN

Overnight stays	2023	0.63 million
Travel expenditure	2023	€1.1 billion
Overnight stays	2024	0.7 million
Change	Year on year	+ 11.2 %
Recovery	vs. 2019	58.1 %
Source market ranking		24

PROFILE OF VISITORS TO GERMANY FROM JAPAN

The Tokyo region accounts for by far the most online searches for Destination Germany. The proportion of business travellers is above average at 46 per cent. Holidays are booked almost exclusively in advance, with around a third being multi-destination tours and another third visits to cities. Travellers from Japan spend €410 per day on average, roughly €87 more than other overseas visitors. Japan is the number 2 source market for Germany in terms of daily spend.

TRIPS TO GERMANY BY MARKET SEGMENT

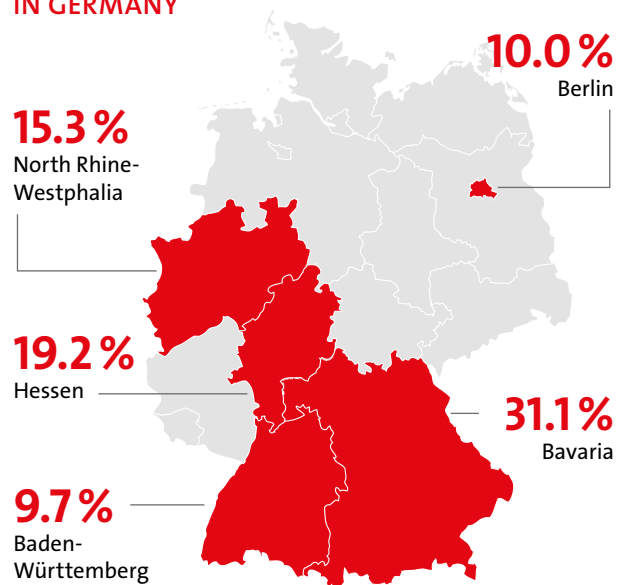


TOP CITY DESTINATIONS IN GERMANY

Munich	18.1 %
Frankfurt	15.5 %
Berlin	10.0 %
Düsseldorf	8.7 %
Hamburg	3.4 %

55.7 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



The top 5 federal states accounted for **85.4 per cent of all overnight stays** in Germany by Japanese visitors in 2024.

Global recognition for the GNTB's work

EMAS implemented successfully

The GNTB completed its certification under the European Eco-Management and Audit Scheme (EMAS) in 2024. This premium environmental management tool, created by the European Commission, helps companies and other organisations to assess, report on and continuously improve their environmental performance.

Platinum status from Green Globe retained

The GNTB was certified as a Green Globe organisation for the eleventh successive year in 2023/24. It thus retained the platinum member status, the highest accolade possible under the well-regarded scheme, that it had been awarded the year before.

2024 German Brand Award

The German Design Council crowned the GNTB's 3D animation of Caspar David Friedrich's 'Wanderer above the Sea of Fog' with its 2024 Gold Award in the 'Brand Communication – Ambient Media & Outdoor Advertising' category. Shown on Europe's largest digital advertising space at London's Piccadilly Circus, the GNTB's 3D video promoted Germany as a cultural travel destination.



GNTB once again a top innovator in 2024/25

Thanks to its digital processes and solutions, the GNTB won over the judges of the TOP 100 SME innovation competition for the fifth year in a row. In its application, the GNTB presented digital projects that were brought to life through a close collaboration between the management team and the employees. The projects help the sector, which predominantly comprises small and medium-sized enterprises, to promote Destination Germany on the international stage.



UNITED KINGDOM

Voted 'Most Desirable Destination for Culture' (no. 1) and 'Most Desirable Destination for Sustainability' (no. 2) in the **2024 Wanderlust Reader Travel Awards**

DENMARK

'Workation' wins award and a Special Mention in the 'Excellence in Brand Strategy and Creation' category at the **2024 German Brand Awards**

ITALY

Voted 'Best Green Travel Destination' in the 'Green Destination' category for the Feel Good campaign by the Italian Travel Writers Association (**GIST - Gruppo Italiano Stampa Turistica**)

CHINA

- **Innovation Award** from China Travel Trade Media for new media content marketing
- Voted 'Best Travel Destination' at the 2024 ULife **Best Travel & Hotels Awards**
- **2024 LUXURY TIMES Global Tourism Bureau Awards**

ARAB GULF STATES

Winner in the category 'Best in Promoting Sustainable and Accessible Travel' at the **Arabian Travel Awards**

CZECH REPUBLIC

'Stay a little bit longer' campaign voted one of the ten most innovative marketing campaigns (**VCCR tourism awards**)

SWEDEN

Award from the Association of National Tourist Office Representatives (**ANTOR**) in Sweden for the best print article in 2023. Journalist Yvonne Gull won for her article "Taking the train to Berlin" in MissVego magazine, which was based on a press tour with GNTB Sweden as part of the 2023 Feel Good/Rail campaign.

OUTLOOK FOR INBOUND TOURISM TO GERMANY

Despite the intensification of geostrategic conflicts, the global tourism sector is starting 2025 on an optimistic note, with travel industry experts predicting high growth rates to continue in the years ahead.

However, this will need stable economic conditions in the major source regions of global tourism. The expansion of the high-spending middle class in heavily populated Asian countries is likely to be the main driver of growth.

Inbound tourism to Germany can take advantage of the increase in international travel and the associated economic value created. But this requires a clear brand profile for Germany as a travel destination on the global stage, a suitable political climate and further progress in the digital transformation.







The perspective of the parties on the German Bundestag's Tourism Committee

The German Bundestag's Tourism Committee raises public awareness of the importance of tourism to the national economy through its initiatives, reviews and hearings. In its parliamentary work, the committee advocates for a reliable policy framework for the industry and is committed to identifying and marketing global trends as early as possible.

The tourism spokespersons representing the political parties in the Bundestag explain what they consider to be the opportunities and challenges of the ongoing digital transformation for Germany as a tourist destination.

DESPITE POSITIVE OVERALL DEVELOPMENT OF GERMANY'S TOURISM INDUSTRY THE SECTOR LAGS FAR BEHIND OTHER COUNTRIES IN TERMS OF ITS DIGITAL TRANSFORMATION.



Jana Schimke,
Member of the German Parliament,
Chair of the Tourism Committee (CDU)

In 2024, the Tourism Committee of the German Bundestag addressed the digital transformation of the tourism industry several times, including in public hearings and on fact-finding tours of Scandinavia and China.

While the overall development of tourism in Germany is certainly positive, it does lag far behind other countries when it comes to the digital transformation of the sector, for example the AI-supported management of visitor flows or integrated travel bookings. It is expected that the new Federal Government will place greater priority on the digital transformation – including as part of the national tourism strategy – than has previously been the case. This will benefit both the travel industry and all those who travel.

WE ARE COMMITTED TO ENSURING THE PROVISION OF A COMPREHENSIVE DIGITAL INFRASTRUCTURE.

The digital transformation opens up tremendous opportunities for tourism in Germany. It will help us to reduce bureaucracy, take pressure off skilled staff and make processes more efficient. One example of this is the complete abolition of hotel registration forms. Digital solutions such as AI-supported systems allow the optimisation of work and booking processes, leaving more time for service and hospitality. At the same time, digitalisation connects the world, with integrated transport options and smart applications making travel easier and promoting sustainable journeys. Digital tools offer start-ups and small businesses new means of implementing innovative and sustainable ideas.

We are committed to ensuring the provision of a comprehensive digital infrastructure, particularly in rural areas. Digital training strengthens the industry and prepares it for the challenges of the future. We are using the opportunities of the transformation to position Germany as a modern, sustainable travel destination that inspires visitors from around the world.



Stefan Zierke,
Member of the German Parliament,
Spokesperson on Tourism Policy for the SPD

DIGITAL BOOKING OPTIONS, DIGITAL PAYMENTS AND DIGITAL INFORMATION ARE ESSENTIAL FOR FOREIGN VISITORS.

The digital transformation is a cornerstone of the long-term success of Germany as a tourist destination. It enables us to attract more visitors to Germany and to inspire them to stay with us for longer. For foreign visitors in particular, digital booking options, digital payments and digital information are integral elements of their decisions on travel and consumption. At the same time, digitalisation reduces the workload of our tourism companies, for example with regard to bureaucratic requirements such as documentation. Digital solutions are also fundamental in the effective management of visitor flows and in enabling sustainable experiences in the great outdoors. We are committed to unlocking tourism potential with a functional digital infrastructure, particularly in rural regions. Consequently, we will be driving forward the goal of digital transformation, not least within the national tourism strategy, in collaboration with state and local authorities.



Stefan Schmidt,
Member of the German Parliament,
Spokesperson on Tourism Policy
for Bündnis 90/Die Grünen

THE GNTB PLAYS A LEADING ROLE IN THE DIGITAL TRANSFORMATION.



Nico Tippelt,
Member of the German Parliament,
Spokesperson on Tourism Policy for the FDP

The digital transformation is an important driver of innovation in virtually every sector of the economy. For Germany as a tourism destination, the opportunities I can see include improving visitor information and the management of visitor flows using digital systems, increasing awareness of destinations that currently receive fewer visitors, and personalising travel experiences through AI and blockchain technologies.

Nevertheless, we are facing substantial challenges, such as a lack of the required expertise and investment capital in many tourism companies, the danger of growing dependency on particular technologies and providers, and the persistent gross inadequacies of the technical infrastructure.

Above all, the FDP sees digitalisation as an opportunity for the German travel industry and as a key factor in the competitiveness and future success of Germany's tourism sector. This is why we are committed to providing specific support and financial assistance to the sector as it undergoes its digital transformation.

The digital transformation is changing traditional supply and demand structures in the tourism industry around the world. Visitors demand new, convenient and comprehensive access to relevant tourism data. The use of innovative approaches will allow us to gain a competitive edge here. In future, new standards such as biometric boarding and greater integration between transport providers and hotels will save us a lot of time, money and stress. Intelligent data management can also help to better manage tourism flows and to avoid localised congestion.

Despite our considerable efforts, Germany still lags behind when it comes to the standards for sharing and utilising data. We must work harder to unlock the potential of artificial intelligence to simplify processes. It is also important to provide particular support to small and medium-sized tourism providers to meet the growing demands of the digital transformation, so that they can benefit from the associated opportunities.



Anja Karliczek, Member of the German Parliament, Spokesperson on Tourism Policy for the CDU/CSU

**# VISITORS DEMAND NEW,
CONVENIENT AND COMPREHENSIVE
ACCESS TO RELEVANT TOURISM DATA.**



Sebastian Münzenmaier,
Member of the German Parliament,
Spokesperson on Tourism Policy for the AfD

The lack of digital innovation in the German tourism sector is primarily due to the massive increase in costs and the sheer volume of regulation in the hotel and restaurant industry. Small and medium-sized businesses in Germany can hardly be expected to take on the risks associated with innovation when a significant section of the hospitality sector sees its very livelihood under threat. There are two main tasks for policymakers here. First, they must urgently reduce bureaucracy to give SMEs space to breathe. Second, the state must endeavour to provide business with affordable electricity, without which there is no point in discussing digital expansion or the use of artificial intelligence.

As in previous legislative periods, the AfD therefore demands extensive tax reductions and a robust energy policy that results in stable economic conditions.

**# THIS REQUIRES ENERGY SECURITY
AND PRICE STABILITY IN GERMANY.**

Outlook for Destination Germany in the international market in 2025

In spite of escalating trade disputes and increasing geopolitical tension at the start of 2025, the GNTB expects further growth for Destination Germany from international source markets in the long term.

Positive forecasts for global tourism in 2025

In the long term, global tourism will continue to grow. According to the UN Tourism Barometer from January 2025, the 1.4 billion arrivals recorded in 2024 are expected to increase by another 3 to 5 per cent in 2025. The forecast assumes that the economic climate remains favourable, that inflation in important source and destination regions continues to drop and that the geopolitical conflicts do not spread any further.

Washington's announcement of punitive tariffs and the escalating trade disputes caused by reciprocal tariffs have depressed the travel industry's expectations significantly in spring 2025.

International arrivals (millions)	2024	2025	2024:2025
Global	1,462	1,650	12.9%
Europe	696	764	9.7%
Asia-Pacific	316	386	22.2%
Americas	249	271	8.7%
Middle East and Africa	106	120	13.5%
Other	94	108	15.3%

Source: Tourism Economics, GTS forecast database download 27 January 2025.

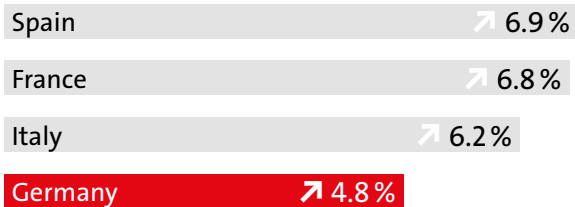
Europe remains the most important source and destination region of global travel in the various scenarios. The Asia-Pacific region shows particularly dynamic growth due to the expanding middle classes in a number of heavily populated countries.

Source regions/market segments with great potential for inbound tourism to Germany

Europe

Three quarters of Germany's inbound tourism currently originate from Europe. The number of Europeans who intend to travel continued to grow over the course of 2024. At 73.3 per cent, the figure rose by six percentage points year-on-year for the period of October 2024 to March 2025, according to the latest Monitoring Sentiment for Intra-European Travel survey (MSIET Wave 20) from the European Travel Commission. In this context, Germany benefits particularly from its strong position as Europeans' top destination for city breaks and cultural travel. The survey identifies culture & heritage (17.9 per cent) and city breaks (17.2 per cent) as the most popular travel segments.

TOP 4 MARKETS TO WHICH EUROPEANS WOULD MOST LIKE TO TRAVEL IN THE NEXT SIX MONTHS



Source: MSIET Wave 20, October 2024 – March 2025.

Based on market analysis by Tourism Economics and the GNTB in spring 2025, the number of overnight stays from the European source markets is expected to remain stable in the current year.

Overseas markets

The strong growth in the Asia-Pacific region, in particular, will also have an effect on inbound tourism to

Germany. The European Travel Commission's Long-Haul Travel Barometer from January 2025 provides detailed analyses of travel from the overseas markets in 2025. According to its findings, almost two thirds of respondents (63 per cent) are planning a long-haul holiday this year, with 44 per cent preferring a European destination. Europe also scored above the average for travel intentions in the fast-growing Chinese market.

AT 22.9 PER CENT, GERMANY WAS THIRD BEHIND FRANCE AND ITALY IN THE RANKING OF INTENDED DESTINATIONS FOR TRAVELLERS FROM OVERSEAS SOURCE MARKETS IN 2025.

The survey indicates that when overseas visitors come to choose a destination, Germany scores highly for being a safe travel destination with world-famous tourist attractions and a high-quality tourism infrastructure. Long-haul travellers also appreciate Germany's preservation of its natural environment and its cultural heritage. However, the decisive factor remains the economic position of potential customers in the source markets. Germany offers outstanding value for money. Although accommodation costs in Germany rose in 2024, they remain at the lower end of the scale compared to other European countries.

Average price of hotel accommodation in 2024	Euros
Germany	111
Austria	123
France	126
Spain	148
Italy	166
Switzerland	173

Source: MKG Consulting.

According to calculations by Tourism Economics and the GNTB, the growth potential from the overseas markets amounts to 11 per cent in 2025. This will come mainly

from China and India, while the volume of overnight stays in Germany from the USA is forecast to rise moderately again.

Sustainability

Sustainability plays an important role when consumers choose a destination. According to a special analysis of IPK International's World Travel Monitor conducted in autumn 2024, 23 per cent of outbound travellers worldwide exclude travel destinations if they do not offer any or only few sustainable options, while 50 per cent are considering doing so. In direct comparison with the competition, Germany held its own in its perception as a sustainable destination, ranking third behind Switzerland and Sweden with regard to climate friendliness and environmental protection.

OVERALL, AROUND 91 MILLION OVERNIGHT STAYS BY FOREIGN VISITORS WOULD MEAN ANOTHER RECORD RESULT IN 2025.

Due to the buoyant growth of non-European source markets, Tourism Economics expects the number of overnight stays in Germany by overseas visitors to account for 30 per cent of the total by 2030.

Travel industry and consumers confirm optimism

The positive expectations of businesses in the international travel trade underline the growth scenarios. The Business Climate Index for Germany of the GNTB Travel Industry Expert Panel, a quarterly survey of around 250 CEOs and key accounts in the international travel trade who do business in Germany, rose by three points in the first quarter of 2025 compared to the fourth quarter of 2024. The current business situation is deemed to be six points above the comparative figures for the previous quarter.

Culture and nature the focus of the GNTB's global marketing in 2025

The GNTB utilises its global campaigns to further define the brand of Destination Germany and make it even more recognisable. The themes chosen for 2025 are based on the strongly positive images of art and culture, as well as on Germany's unique natural landscapes, with the aim of attracting new travellers from high-potential markets and inspiring regular visitors to keep coming back to Germany.



Worldwide, Germany is the number one cultural travel destination for Europeans. Its ongoing success is based on a rich cultural heritage, but also on contemporary art and on sites associated with particular artists – in cultural hotspots and in academies that attract up-and-coming talents from around the world.

The GNTB's new inspiration campaign, Cultureland Germany, picks up on this strong positioning and has been showcasing sustainable travel experiences in Germany in a cultural context since the end of February 2025.

The GNTB campaign highlights Germany's multi-faceted cultural scene, from its many museums, galleries, academies and art institutions to its architecture, innovative design and public art, as well as world-renowned music and cultural events. There is also a focus on Germany as a wine-growing country.

The relaunch of the campaign in 2025 features a total of 80 POIs on the Art, Design and Music subpages – including new POIs for concerts and festivals – as well as a map of Germany on the campaign's home page with links to the events listings of the individual federal states. An event calendar with search widgets based on data from the Knowledge Graph will be added in the spring.

Natural landscapes are one of Destination Germany's biggest assets in the international travel market. A third of the country's land area is under special protection in more than 130 designated natural landscapes, from national parks and UNESCO biosphere reserves to nature parks.

This emphasis on nature reflects the travel intentions of potential visitors to Germany. Already, around one fifth of international overnight stays are in rural regions, with Germany the second-most popular destination for nature-based holidays of European travellers worldwide. In fact, research carried out by the European Travel Commission in October 2024 revealed that only city breaks and cultural trips are more popular among European holidaymakers than nature and the outdoors.

The relaunch of the GNTB's successful Embrace German Nature campaign in 2025 will showcase the wide range of holiday options in unspoilt natural landscapes, focusing on the three UNESCO Natural World Heritage sites, 16 biosphere reserves, 16 national parks, 19 geoparks and 104 nature parks.



The campaign's relaunch emphasises the GNTB's commitment to sustainable, responsible travel, for example on the excellent network of cycling and walking routes for families, keen hikers or those looking to enjoy the great outdoors at a slower pace.



The main objective of the GNTB's sustainability strategy is to position Germany as a sustainable destination. Analyses by IPK International and the GNTB Travel

Industry Expert Panel attest to the successful implementation of this strategy. According to these surveys, Germany ranked third in customers' assessment of the range of climate and environmentally-friendly offerings. Half of the CEOs in the international travel industry market Germany as a sustainable destination.

The main driver of this trend are the increasing number of certified offerings from German tourism providers. By continuing its global 'Simply Feel Good' lead campaign on sustainability, the GNTB is focused on enhancing the international visibility of sustainable tourism options, and on actively promoting them. All of the featured destinations have been independently assessed by TourCert to verify their green credentials.

In 2025, the Feel Good campaign will receive its own specially composed music, while the content will be expanded to include destinations newly certified by TourCert.

Christmas customs and traditions in Germany are known and loved all over the world. Since 2020, the GNTB has put the special festive atmosphere that can be experienced in towns and cities large and small at the centre of its 'Season's Greetings from Germany' campaigns. In 2025, the festive season will once again play an important part in the GNTB's worldwide campaign portfolio to promote visits to Germany in the run-up to Christmas and to offer strategic support for the marketing activities of its partners in the tourism, retail and hospitality industry, as well as in art and culture.



Spotlight on German cultural history – key themes for 2025

In addition to its global theme-based campaigns, which showcase the main facets of Destination Germany's core brand and enhance the brand profile over the long term, the GNTB regularly uses special occasions such as major events and anniversaries to supplement its communication with other key themes.



275th anniversary of the death of Johann Sebastian Bach

In 2025, it will be 275 years since Bach died, and the GNTB is taking this opportunity to draw the attention of culturally minded travellers from around the world to this musical genius. Using digital data sources, it will inform them about the various places in Germany that they can visit to learn more about his life and legacy.

The website for this key theme features travel tips for the most important locations associated with Johann Sebastian Bach in Thuringia, Saxony and Saxony-Anhalt, as well as the many Bach-related music events

taking place across the country. There is even a playlist with a selection of Bach's major works, as well as pop and rock songs inspired by Bach, to provide a taste of the musical delights on offer. A search widget allows international visitors to look for specific festivals, concerts, exhibitions and more, including descriptions, dates and opening times. The relevant data comes from the GNTB's Knowledge Graph and is based on open data from the regional tourism organisations.



50 years of the German Fairytale Route

The GNTB will also be promoting the 50th anniversary of the German Fairytale Route in 2025. This popular tourist trail links various places and regions associated with the life of the Brothers Grimm and their much-loved children's stories.

A dedicated content page provides information about the German Fairytale Route and features a map showing the main locations related to the Brothers Grimm.

The GNTB has also developed a new app, Grimm's Quest, to enable people from around the world to get a virtual glimpse of selected parts of the route. The app's mini-games, based on five of the best-known Grimm fairytales (Little Red Riding Hood, Frog Prince, Rapunzel, Snow White, Hansel and Gretel) link to specific travel tips for particular regions. This will inspire users to explore the history of the Brothers Grimm and to discover the real locations of the tales for themselves.

The app is promoted on the Facebook, YouTube, Instagram and TikTok social media channels, as well as on channels specific to China.



→ Play now

www.germany.travel/grimms-quest



Outlook from the perspective of the regional tourism organisations

Where do you see the greatest challenges and opportunities for the development of Germany's inbound tourism industry in 2025?

In 2024, inbound tourism to Baden-Württemberg recovered almost completely from the recent crises. That was thanks in no small measure to the many visitors who travelled south for the games we hosted as part of EURO 2024. Our international visitors have a great desire to travel, which fills me with confidence for 2025. Not only are our key neighbouring markets performing well, but demand for our destinations from the USA is also increasing significantly again.

Baden-Württemberg



Christine Schönhuber, Managing Director of Tourismus Marketing GmbH Baden-Württemberg



Bavaria

Barbara Radomski, Managing Director of Bayern Tourismus Marketing GmbH

Bavaria is the main pillar of inbound tourism to Germany, accounting for 24.4 per cent of all overnight stays by international visitors. To ensure it stays that way, tourism must be seen as a strategic priority. That makes it essential to invest in Bavaria's attractiveness and infrastructure, and for local authorities, stakeholders and policymakers to collaborate closely. Tourism needs to be sustainable, innovative and socially significant to safeguard the future of Germany's position as a leading destination.

Burkhard Kieker: Berlin's visitor economy is entering into 2025 on a cautiously optimistic note. Highlights for the year include the 200th anniversary of Berlin's Museum Island, spectacular exhibitions, the debut of the NFL American Football League in Berlin and the Festival of Lights. But challenges remain, such as high fees and taxes in aviation. However, we firmly believe that Berlin's appeal will continue to attract people from around the world to the city in 2025.

Sabine Wendt: In 2025, we are focusing on digital transformation, sustainability and innovations management – key requirements to ensure the success of Berlin as a tourist destination in the long term. We place particular importance on actively involving our tourism and MICE partners and other stakeholders from the city in this transformation process so that we can shape the future of destination Berlin together.

Berlin



Sabine Wendt and Burkhard Kieker, Managing Directors of visitBerlin

Brandenburg



Christian Woronka,
Managing Director of TMB
Tourismus-Marketing Brandenburg GmbH

Our biggest challenge is the financing of tourism structures and infrastructure. It is therefore important to emphasise the significance of tourism for the quality of life in our regions even more clearly. Strong collaborations provide opportunities to tackle projects together and to make optimal use of budgets. The GNTB Knowledge Graph and the Open Data Tourism Alliance are prime examples of this. With regard to motives for travel, in my view the fact that visitors are looking for a slower pace to counteract the ever-increasing complexity of everyday life offers further potential for us as a predominantly rural destination.

After Germany's recent election, tourism must actively look for the opportunity to be recognised as a key industry and consequently receive better support from policymakers again. In Germany, we also need to put much greater emphasis on the digital optimisation of the entire customer journey, from inspiration through booking all the way to customer contact after the trip. There is considerable room for improvement given the incredible opportunities offered by AI and also by cashless payments for our visitors from around the world. Bremen has certainly begun its journey in that respect.

Bremen



Oliver Rau, Managing Director of WFB
Wirtschaftsförderung Bremen GmbH,
marketing and tourism department

Hamburg



Michael Otremba, Managing Director of
Hamburg Tourismus GmbH

The New York Times has just recommended Hamburg as a travel destination. Among other things, they highlighted the city's innovative spirit, citing the restoration of the St. Pauli Bunker as an example. It is a symbol of what is possible given the courage and creativity. We need more of that, so that our destination can project the positive mood of a new era, igniting people's curiosity again and again so that they feel inspired to visit Germany.

Hessen's tourism systems are not immune to being put under pressure by the current economic situation and the changing geopolitical environment. The impact on the industry is tremendous and we as an LTO are facing up to these challenges. It is becoming increasingly important to position Hessen as a strong tourist destination with a compelling brand strategy. The aim is to increase tourism awareness within the state, to drive forward the digital transformation and to act as an expert partner.

Hessen



Herbert Lang, Head of Tourism,
HA Hessen Agentur GmbH

Mecklenburg-Vorpommern



Tobias Weitendorf, Commissioner for Tourism of the State of Mecklenburg-Vorpommern and Managing Director of Tourismusverband Mecklenburg-Vorpommern e.V. (until 15 April 2025)

Encouragingly, international visitors are now travelling as much as they used to before the pandemic. Accommodation providers in the holiday region of Mecklenburg-Vorpommern would naturally like to welcome as many of them as possible. To that end, we launched a new international strategy last year, in which we use special pools of partners from tourism associations and business to open up markets together. Our location and our transports links continue to present a challenge. However, the new flight connections to Vienna and Zurich do represent some progress. If these were followed by other options, including rail links, that would be an added boost for us.

Inbound tourism is our chance to establish Lower Saxony as a leading destination for authentic, sustainable tourism. The challenges are obvious – rising prices, shorter stays and the shortage of skilled workers – but these are also opportunities to position ourselves more emphatically. We are focusing on a clear profile and an emotional approach that appeals directly to what our visitors are looking for. Smart digitalisation and innovative approaches allow us to reach the target demographic of tomorrow. Our primary aim for 2025 is to further intensify collaboration across all aspects of tourism in Lower Saxony. TMN brings the industry together, consolidates ideas and creates synergies. Success is based on agile, process-oriented networks – and that is exactly where we come in.

Lower Saxony



Meike Zumbrock, Managing Director of Tourismus Marketing Niedersachsen GmbH

North Rhine-Westphalia



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

Inbound tourism in North Rhine-Westphalia was very much back in 2024. We want to consolidate that position and indeed we need to. One key factor will be to ensure a completely digital customer journey. However, we must also keep providing new incentives to travel. In 2025, we are going to focus on castles and palaces, a theme not typically associated with North Rhine-Westphalia. But nowhere else in Germany has as many of them as we do.

The global situation poses challenges for all of us that can only be overcome through close collaboration. Despite the difficult circumstances we take an optimistic view of the future. And following more stable demand from domestic visitors in recent years, we are now also beginning to see an upturn in inbound tourism. We are confident that this positive development will continue in 2025, in particular from the European source markets where we are focusing our efforts.

Rhineland-Palatinate



Stefan Zindler, Managing Director of Rheinland-Pfalz Tourismus GmbH



Saarland

Birgit Grauvogel, Managing Director
of Tourismuszentrale Saarland GmbH

In Saarland, we too face the enormous challenge of keeping pace with new AI applications as more and more of them are introduced in management and customer service. For work to be efficient, it will become increasingly important to differentiate between relevant and less relevant matters. At the same time, Saarland has the opportunity to further establish itself as a sports destination, building on our major cycling events as part of the Tour de France and the Deutschland Tour. With our sustainable and nature-based tourism offerings we remain well prepared for the challenges of climate change.

Inbound tourism has become a major driver for the tourism industry in Saxony, helping it to achieve just over 8 per cent growth in the international market. We are determined to build on that success. But 2025 will not be an easy year. Although consumers rank travel and holidays very highly in principle, there may well be some spending restraints, especially in the area of short breaks, cultural tourism and city breaks. That makes it all the more important to continue promoting Germany abroad in order to close this gap. For example, we are expecting positive effects from Chemnitz's year as the European Capital of Culture 2025.

Saxony



Veronika Hiebl, Managing Director of
Tourismus Marketing Gesellschaft Sachsen
mbH



Saxony-Anhalt

Dr Robert Franke, Managing Director
of Investitions- und Marketinggesellschaft
Sachsen-Anhalt mbH

Above all, I would like to highlight the opportunities for Saxony-Anhalt as a travel destination. To celebrate the 100th anniversary of the Bauhaus in Dessau we will be showcasing authentic world heritage with compelling travel incentives and inspiring events in 2025 and 2026. Our new Saxony-Anhalt Travel Compass is an interactive planning tool that allows foreign visitors to generate customised recommendations for making the most of their stay in the region.

The tourism industry in Schleswig-Holstein had another successful year in 2024, thanks to our visitors and dedicated hosts. Going on holiday remains a fundamental desire, which represents a huge opportunity for the entire sector. An opportunity that we need to seize through innovative, customised, top-quality offers that are also good value for money. Tighter budgets will force visitors to keep an even closer eye on what exactly they are getting. They are not going to lower their standards, and there is plenty of competition out there. The industry is facing far-reaching structural changes. For most of us, carrying on as before will not bring long-term success. I am confident that the courage to change will be rewarded.

Schleswig-Holstein



Dr Bettina Bunge, Managing Director
of Tourismus-Agentur Schleswig-Holstein
GmbH



Thuringia

Christoph Gösel, Managing Director of
Thüringer Tourismus GmbH

Here in Thuringia, our main focus in 2025 is to develop a new tourism strategy that will lay the foundations for the coming years. Changes to travel behaviour and the rising expectations of various target groups will continue to greatly impact the course of inbound tourism in 2025. A clear strategy will allow us to embrace relevant trends, influence decision-making by providing incentives to travel and strengthen Thuringia's profile as a centrally located travel destination in the long term.

INTERNAL PROCESSES IN 2024 AND ORGANI- SATIONAL STRUCTURE IN 2025

The projects for change and digitalisation that have been launched in the administrative area are subject to continuous review and further optimisation to enable them to better support the organisation's day-to-day operations.

Strict cost discipline is applied to the deployment of the available financial resources and care is taken to ensure it focuses on the organisation's core tasks. HR planning and management are flexibly adapted to changing requirements.

Additional IT infrastructure investments in the areas of cloud computing and system security strengthen the foundations of the digital organisation and increase flexibility. The further refinement and development of internal processes ensure that they are even more closely aligned to the requirements of operational management.





Administration

The GNTB continually optimises its internal organisation to create the ideal environment – in terms of finance, personnel and technology – for its day-to-day operations.

Financial management

The focus of financial management is on using the available funding efficiently and prudently, and on continually digitalising processes.

Grants from the BMWK

The stable level of funding from the Federal Ministry for Economic Affairs and Climate Action (BMWK) compared to the previous year ensures the continuity of the GNTB's work and boosts the income from services.

Marketing spend

Global marketing of Destination Germany accounts for around two-thirds of all spend. Stable funding compared to the previous year and an increased level of self-generated funds created additional scope for action on the operational front.

Income from services

In 2024, the GNTB was able to further increase its income from services, generating excellent results, in particular from major events and digital marketing.

Other operating expenses

There was a particular focus on the economical and efficient utilisation of other operating expenses in 2024. Despite inflation and rising infrastructure costs we were able to keep expenses stable through strategic cost optimisation measures and a needs-based management of resources – without a detrimental impact on operations.

The continuous review of existing contracts and the digitalisation of processes made a significant contribution to cost efficiency. In addition, all procurement processes were scrutinised and any potential savings were rigorously implemented.

These measures underline our commitment to a responsible and efficient use of resources that contributes to the long-term financial stability of the GNTB. Thanks to this economical approach and our stable funding it was also possible to realise important investments in the GNTB's digital infrastructure and system security.

Human Resources, Legal, Central Services

The GNTB employment plan for 2024 included a total of 153.1 full-time equivalent (FTE) positions, which were covered by nearly 200 full-time and part-time employees. These figures were unchanged from 2023. Of this total, 76.1 FTEs were at head office, 75 were based abroad, and there were two executive positions, one of which remained vacant.

There was great demand for the €49 Deutschlandticket, which enables employees to opt for a low-emission journey to work at Frankfurt's Beethovenstrasse. Together with the continued option of working from home for several days, this allowed GNTB staff to contribute two important elements to the organisation's successful EMAS certification.

As part of the further digitalisation of internal work processes at the GNTB, the HR department has been offering employees the option of digitally downloading their payslips and other documents since autumn 2024, making the printing and posting of paper copies redundant.

Young talent at the GNTB

The GNTB had a total of 17 recruits in training in 2024, comprised of nine apprentices, six degree apprentices and two graduate trainees.

Vocational apprenticeships

In 2024, the GNTB continued its long-standing commitment to offering vocational apprenticeships. Three apprentices took their final exams at the Chamber of Commerce and Industry in the recognised occupations of marketing communications specialist and tourism specialist in private and business travel. The course sees apprentices gain experience in a range of departments, complete a work placement at one of the GNTB's European offices and take part in trade fairs and other events.

Degree apprenticeships

The degree apprenticeship in tourism management offers school leavers a combination of theory and practical experience. Students put the theory they learn at university into practice at the GNTB. They do six practical placements during which they support projects

GNTB financial overview: sources and appropriation of funds¹⁾

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.

Income	2024	%	2023	%	2022	%	2021	%	2020	%	2019	%
Income from services	8,437	17.0	7,810	15.9	7,157	15.2	4,935	9.9	4,122	10.8	8,392	19.5
Grants from the BMWK	40,595	81.6	40,522	82.6	39,052	83.2	44,126	88.5	33,399	87.3	33,950	78.7
Grants and contributions from members	719	1.4	725	1.5	749	1.6	782	1.6	732	1.9	780	1.8
Income from GNTB budget²⁾	49,751	100.0	49,057	100.0	46,958	100.0	44,843	100.0	38,253	100.0	43,122	100.0
Income from special projects ³⁾	0		0		135		116		123		303	
Total income (consolidated)	49,751		49,183		47,093		49,959		38,376		43,426	

Additional income from non-cash contributions	1,591		904		927		817		416		2,182	
------------------------------------------------------	--------------	--	------------	--	------------	--	------------	--	------------	--	--------------	--

Expenditure	2024	%	2023	%	2022	%	2021	%	2020	%	2019	%
Personnel expenditure for marketing and administration	13,189	26.5	12,891	26.3	12,659	27.0	12,453	25.0	11,984	31.3	11,513	26.7
Other operating expenses	3,481	7.0	3,173	6.5	3,279	7.0	3,110	6.2	3,006	7.9	2,944	6.8
Capital investment	739	1.5	878	1.8	409	0.9	357	0.7	196	0.5	373	0.9
Marketing spend	32,330	65.0	32,115	65.4	30,611	65.2	33,923	68.1	23,067	60.3	28,292	65.6
Expenditure from GNTB budget²⁾	49,739	100.0	49,057	100.0	46,958	100.0	49,843	100.0	38,253	100.0	43,122	100.0
Expenditure on special projects ³⁾	12		126		135		116		123		303	
Total expenditure (consolidated)	49,751		49,183		47,093		49,959		38,376		43,426	

Use of additional income from non-cash contributions	1,591		904		927		817		416		2,182	
-------------------------------------------------------------	--------------	--	------------	--	------------	--	------------	--	------------	--	--------------	--

and assist with day-to-day business. The purpose of the degree apprenticeship is to develop talented young prospects and prepare them for a career at the GNTB or in tourism. 2024 was the first time that no places were offered for new students.

The graduate trainee programme

Since 2023, the graduate trainee programme once again forms part of the GNTB's commitment to developing young talent.

In addition to two marketing modules, the 18-month programme gives young graduates the opportunity to gain further experience abroad. Once they have successfully completed the programme, the aim is to offer them permanent employment at one of the GNTB's offices in Germany or another country.

Continuing professional development

GNTB employees from across the globe attended continuing professional development training in 2024, deepening and expanding their professional expertise in more than 50 sessions. In addition to consolidating professional skills, the training also provided more general know-how.

The training on social, methodological and interpersonal skills was increasingly provided face to face, while the majority of the training on specific professional topics was held online, which was particularly resource-efficient and saved time on travel.

Data protection at the GNTB

Personal data was always processed in accordance with applicable data protection laws, such as the EU's GDPR and the German Data Protection Act. Since the start of 2025, a new service provider has taken over the GNTB's external data protection. In accordance with the requirements of the Whistleblower Protection Act, the mandatory external and internal reporting channels have been set up and communicated to employees.

IT developments in 2024

- 2024 was defined by significant progress in the digital transformation process. The IT infrastructure was further modernised and optimised, both internally and in collaboration with external partners.
- Increasing use of Microsoft Teams, particularly in external collaborations
- Migration to Windows 11 for enhanced security and efficiency
- Transition to Microsoft Intune to simplify IT management
- Introduction of AI to help with everyday tasks

These measures served to further professionalise the GNTB's IT processes and future-proof the technologies used.

Internal and external collaboration

Microsoft Teams remains the central communication and collaboration platform. There was a particular focus on the better integration of external partners in 2024. This was achieved by extending guest permissions and authorising collaboration channels that allow external parties to obtain the data they require without giving them access to confidential information.

Common data management with SharePoint and OneDrive enables people to work on documents in real time, regardless of their location.

The increased use of Teams webinars allowed virtual training courses, webinars and general meetings to be organised more efficiently. Microsoft Intune was introduced to replace the previous method of software distribution and to simplify device management and software provision.

Introduction of the AI-supported application

Microsoft Copilot

One particularly exciting IT topic in 2024 was the introduction of artificial intelligence in the form of Microsoft Copilot.

Using this AI-supported application, routine tasks such as producing minutes, reports and presentations can be done faster and more professionally. For example, Copilot can automatically minute Teams meetings and summarise the most important points.

Copilot can also help to structure emails more efficiently, suggest replies and organise appointments.

GNTB members, sponsors and partners

Working closely with the German travel industry and private-sector partners and trade associations, the GNTB develops sales strategies and marketing campaigns to promote Germany's positive image abroad as a travel destination and to encourage tourists to visit the country.

Members

As at April 2025

Companies



A · Amadeus Germany GmbH · Avis Budget Autovermietung GmbH & Co. KG · **B** · BWH Hotels Central Europe GmbH · **D** · DB Fernverkehr AG · Deutschland Museum DM GmbH · Deutsche Lufthansa AG · Deutsches Weininstitut GmbH · Dorint GmbH · **E** · ERGO Reiseversicherung AG · Europa-Park GmbH & Co. Mack KG · **F** · Flughafen Düsseldorf GmbH · Fraport AG · Friedrichstadt-Palast Betriebsgesellschaft mbH · **G** · Global Blue Deutschland GmbH · GCH Hotel Group · Grand Metropolitan Hotels Holding B.V. · **H** · H World International · Hilton · **J** · JCB International Ltd. Branch · **K** · Käthe Wohlfahrt KG · Kuoni Tumlare – JTB Germany GmbH · **M** · Maritim Hotelgesellschaft mbH · Mastercard Europe SA · Staatliche Porzellan-Manufaktur Meissen GmbH · Messe Berlin GmbH · **N** · Novum Hospitality · **O** · Outletcity AG · **P** · Passionsspiele Oberammergau Vertriebs GmbH & Co. KG · **S** · Sixt SE · **T** · TUI AG · **V** · Ingolstadt Village & Wertheim Village · VISA European Management Services Ltd., German Branch

Tourism marketing organisations of the federal states



B · Bayern Tourismus Marketing GmbH · Berlin Tourismus & Kongress GmbH · **H** · HA Hessen Agentur GmbH · Hamburg Tourismus GmbH · **I** · Investitions- und Marketinggesellschaft Sachsen-Anhalt mbH (IMG) · **R** · Rheinland-Pfalz Tourismus GmbH · **T** · Tourismus NRW e. V. · 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 · **W** · WFB Wirtschaftsförderung Bremen GmbH

Corporate bodies, trade associations, marketing associations



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) · Deutsche Industrie- und Handelskammer e. V. (DIHK) · Deutsches Küstenland e. V.* · Deutscher Reiseverband e. V. (DRV) · Deutscher Tourismusverband e. V. (DTV) · Deutsches Jugendherbergswerk e. V. (DJH) · **G** · German Convention Bureau e. V. (GCB) · **H** · Historic Highlights of Germany e. V. · Hotelverband Deutschland e. V. (IHA) · **M** · Magic Cities Germany e. V. · **R** · RDA Internationaler Bustouristik Verband e. V. · **U** · UNESCO-Welterbestätten Deutschland e. V. · **W** · Willy Scharnow-Stiftung für Touristik

* Strategic partner.

Sponsors

Companies and organisations that are interested in the GNTB but do not fulfil the criteria for membership can join the GNTB as sponsors. 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.



A · AG „Leichter Reisen – Barrierefreie Urlaubsziele in Deutschland“ · **B** · Bundesverband der Deutschen Incoming-Unternehmen e. V. · Bundesverband der Gästeführer in Deutschland e. V. (BVGd) · **C** · Citta-slow Deutschland e. V. · **H** · Hochschule Heilbronn – Fakultät für International Business · **I** · IPK International GmbH · **P** · Pacific Asia Travel Association (PATA) · **PROJECT M** GmbH · **R** · Romantische Straße Touristik-Arbeitsgemeinschaft GbR · **S** · Staatsbad Norderney GmbH · **T** · Toskanaworld GmbH · **TOURCOMM** Germany GmbH & Co. KG · **TOURISMUSVERBAND SÄCHSISCHE SCHWEIZ** e. V. · **U** · Usedom Tourismus GmbH · **V** · Verband Deutscher Naturparke e. V. · **W** · Wilde & Partner Communications GmbH

Collaboration with public bodies



A · Auswärtiges Amt/German embassies and consulate generals · **D** · Deutsche Auslandshandelskammern (AHK) · **G** · Germany Trade and Invest (GTAI) · Goethe-Institut e. V.

Members of the GNTB Board of Directors

President



Brigitte Goertz-Meissner
President of the
German Spa Association

Vice Presidents



Michaela Kaniber
Bavarian Minister of State for
Food, Agriculture, Forestry and
Tourism



Reinhard Meyer
President of the German
Tourism Association (DTV)



Guido Zöllick
President of the German Hotel
and Restaurant Association
(DEHOGA)

Other elected members



Johannes Walter
Vice President Area Manage-
ment Home Markets and
Global B2B Servicing
Lufthansa Group



Birgit Grauvogel
Spokesperson of the regional
tourism organisations, Man-
aging Director of Tourismus
Zentrale Saarland GmbH



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



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



Benedikt Esser
President of the RDA
International Coach Tourism
Federation



Norbert Fiebig
President of the
German Travel Association
(DRV)



Stefanie Berk
Member of the Management
Board with responsibility for
marketing Deutsche Bahn
Fernverkehr AG



Michael Mack
Managing Partner of
Europa-Park GmbH & Co Mack
KG

As at April 2025

The members were elected at the 126th general meeting on 30 November 2023.

Other elected members



Gerhard Griebler
Managing Director of Passions-
spiele Oberammergau Vertriebs
GmbH & Co. KG



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



Dr Volker Treier
Head of Foreign Trade and
Member of the Board of
Directors at the Association of
German Chambers of Industry
and Commerce (DIHK)



Dr Oliver Rengelshausen
Director of Account Management
for Travel Sellers in Germany,
Austria and Switzerland, General
Manager at Amadeus Germany
Amadeus IT Group GmbH

Ministerial representatives



Dr Armgard Maria Wippler
Ministerial Director, Head of De-
partment VII C – SME and Start-
up Financing, KfW development
bank, Federal Ministry for Eco-
nomic Affairs and Climate Action



Markus Siebels
Ministerial Counsellor, Head of
Department II A3 – Budget Law
and Budget System, Federal
Ministry of Finance



Dr Marion Weber
Ministerial Counsellor, VIID2 –
International Tourism Policy/
Travel Industry, Federal Ministry
for Economic Affairs and
Climate Action

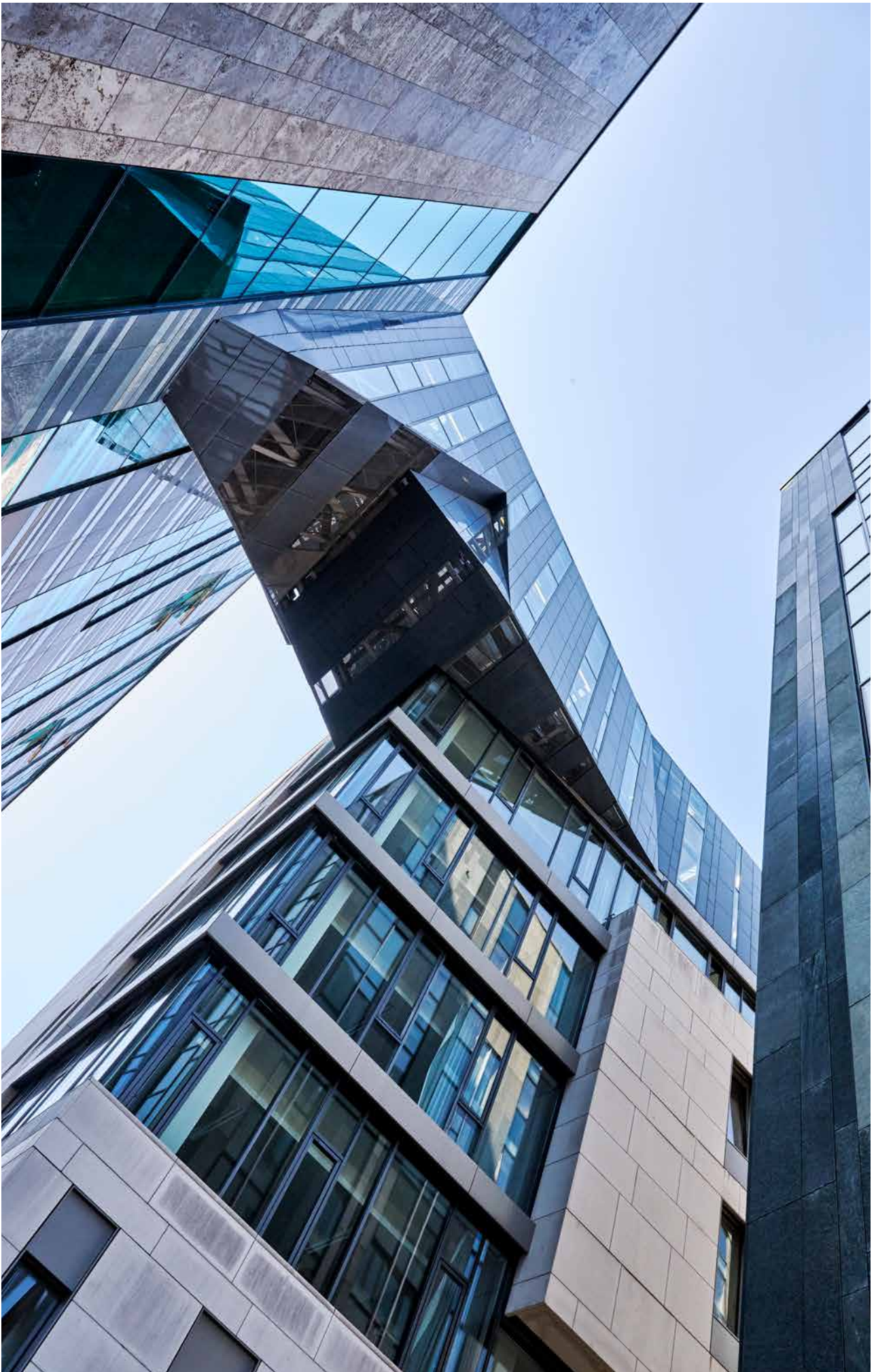
Honorary Presidents



Klaus Laepple
President of the Federal
Association of the German
Tourism Industry (ret.);
Honorary President of the
German Travel Association



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



Members of the GNTB Advisory Board

As at April 2025

The members were elected at the 126th general meeting on 30 November 2023.

Chairman

Dirk Binding

Head of Department for the Digital Economy, Infrastructure and Regional Policy (DIR), Association of German Chambers of Industry and Commerce (DIHK)

First Deputy Chairman

Burkhard Kieker

Managing Director of Berlin Tourismus & Kongress GmbH

Second Deputy Chairwoman

Karina Kaestner

Vice President, Partner Management, DB Fernverkehr AG

Other elected members

Simon Graff

Managing Director of FOR REAL?! Media GmbH

Monika Reule

Managing Director of the German Wine Institute

Benjamin Suthe

Managing Director of the panorama 361 tourism consultancy

Professor Conny Mayer-Bonde

Dean of the Business School Baden-Wuerttemberg Cooperative State University Center for Advanced Studies

Professor Martin Strasdas

Head of the master's programme in Sustainable Tourism Management, and Head of the Centre for Sustainable Tourism (ZENAT) working group, at Eberswalde University

Ex officio members

Ministerial Counsellor Helge Pols

Head of Department G 10 (Policy Matters, Finance Policy and Competition Policy) at the Federal Ministry for Digital and Transport (BMDV)

Counsellor Michael Dorn

Head of Department 404 – International Technology Policy, Digital Economy and Mobility, Federal Foreign Office

Jessica von Schrenck

Head of Department 312 – Economy, Climate, Construction, Press and Information Office of the Federal Government

Federal state representatives

Baden-Württemberg

Ministerial Counsellor Diana Schafer
Ministry of Economic Affairs, Labour and Tourism

Hessen

Ministerial Counsellor Ulrike Franz-Stöcker
Ministry of Economic Affairs, Energy, Housing, Transport and Rural Affairs

Saarland

Ministerial Counsellor Dr Rainer Schryen
Ministry for Economic Affairs, Innovation, Digitalisation and Energy

Bavaria

Administrative Director Birgit Graßl
Bavarian Ministry for Food, Agriculture, Forestry and Tourism

Mecklenburg-Vorpommern

Gunnar Bauer
Ministry for Economic Affairs, Infrastructure, Tourism and Labour

Saxony

Frank Ortmann
Saxony Ministry for Science, Culture and Tourism

Berlin

Senate Councillor Anja Sabanovic
Senate Department for Economic Affairs, Energy and Public Enterprises

Lower Saxony

May-Britt Pürschel
Ministry of Economics, Transport, Construction and Digitalisation

Saxony-Anhalt

Elmar Heisterkamp
Ministry for Economic Affairs, Tourism, Agriculture and Forestry

Brandenburg

Ministerial Counsellor Martin Linsen
Ministry for Economic Affairs, Labour, Energy and Climate Action

North Rhine-Westphalia

Ministerial Counsellor Frank Butenhoff
Ministry for Economic Affairs, Industry, Climate Action and Energy

Schleswig-Holstein

Dr Birte Pusback
Ministry for Economic Affairs, Transport, Labour, Technology and Tourism

Free Hanseatic City of Bremen

Cornelia Riebl
Senator for the Economy, Ports and Transformation

Rhineland-Palatinate

Ute Meinhard
Ministry of Economy, Transport, Agriculture and Viticulture

Thuringia

Olaf Dirlam
Ministry of Economic Affairs, Agriculture and Rural Affairs

Free Hanseatic City of Hamburg

Michael Jenke
Office for Economic Affairs and Innovation

The GNTB International Marketing Committee

Elected members

Benedikt Brandmeier

Head of Tourism, Events and Hospitality,
Department of Labour and Economic
Development, City of Munich

Anna Graf

Consultant
Arvato Systems

Ulrike Jessel

General Manager and Deputy Artistic
Director of the Dresden Music Festival

Gisela Moser

Managing Director of MosGiTo –
Barrier-Free Tourism

Tino Richter

Managing Director of the
Saxon Switzerland Tourist Board
Sächsische Schweiz e.V.

Regional marketing organisations

Baden-Württemberg

Christine Schönhuber,
Managing Director of Tourismus Marketing
GmbH Baden-Württemberg (TMBW)

Bavaria

Barbara Radomski
Managing Director of Bayern Tourismus
Marketing GmbH

Brandenburg

Christian Woronka
Managing Director of TMB
Tourismus-Marketing Brandenburg GmbH
(Dieter Hütte until February 2024)

Hamburg

Michael Otremba
Managing Director
of Hamburg Tourismus GmbH

Hessen

Herbert Lang
Head of Tourism, HA Hessen Agentur GmbH

Rhineland-Palatinate

Stefan Zindler
Managing Director
of Rheinland-Pfalz Tourismus GmbH

Saxony

Veronika Hiebl
Managing Director of TMGS Tourismus
Marketing Gesellschaft Sachsen mbH

Saxony-Anhalt

Dr Robert Franke
Managing Director of IMG Investitions- und
Marketinggesellschaft Sachsen-Anhalt mbH

Ex officio members

Allgemeiner Deutscher

Fahrrad-Club e.V. (ADFC)

Christian Tänzler
Member of the National Board

Amadeus Germany GmbH

Dr Oliver Rengelshausen
Director of Account Management for
Travel Sellers in Germany, Austria and
Switzerland, General Manager at
Amadeus Germany
Amadeus IT Group GmbH

Avis Budget Autovermietung

GmbH & Co. KG

Julietta B. Rehne
Senior Manager, Direct Sales

Bundesverband der Deutschen

Tourismuswirtschaft e.V. (BTW)

Sven Liebert
General Secretary

BWH Hotels Central

Europe GmbH

Alexander Birk
Head of Marketing

DB Fernverkehr AG

Oliver Ueck
Head of DB-DSB Collaboration/Promotion
North-west and eastern Europe

Deutsche Lufthansa AG

Fabiola Nau
Manager of Leisure Sales

Deutscher Heilbäderverband e.V. (DHV)

Brigitte Goertz-Meissner
President

Deutscher Hotel- und Gaststättenverband e.V. (DEHOGA)

Ingrid Hartges
CEO of the German Federal
Hotel and Restaurant Association

Steigenberger Hotels GmbH

H World International

Robert Oudshoorn
Director of Regional Sales, Europe

As at April 2025

The members were elected at the 126th general meeting on 30 November 2023.

Ex officio members

Deutsche Industrie- und Handelskammer e.V. (DIHK)

Julia Seibert
Head of Tourism Economy and Tourism Policy

Deutscher Reiseverband e.V. (DRV)

Norbert Fiebig
President

Deutscher Tourismusverband e.V. (DTV)

Norbert Kunz
Managing Director

Deutsches Jugendherbergswerk e.V. (DJH)

Markus Kilp
Head of Marketing & Sales

Deutsches Weininstitut GmbH (DWI)

Monika Reule
Managing Director

Deutschland Museum DM GmbH

Robert Rückel
Managing Director

Dorint GmbH

Sabine Dreesen-Helten
Director of Sales Service

ERGO Reiseversicherung AG

Iris Nebbe
Manager, Sales Accommodation |
Tourism in Germany | Coach Tourism

Europa-Park GmbH & Co. Mack KG

Rüdiger Büchele
Head of Sales and Tourism

Flughafen Düsseldorf GmbH

Eckhard Mischke
Head of Consumer Marketing

Fraport AG

Thomas Kirner
Head of Marketing
Aviation Development

Friedrichstadt-Palast

Betriebsgesellschaft mbH
Natascha Lecki
Director of Marketing, Sales & PR

GCH Hotel Group

Michaela Bühler
Director of Leisure Sales

German Convention Bureau e.V.

Matthias Schultze
Managing Director

Global Blue Deutschland GmbH

Karen Schmid
Head of CVC & Marketing Germany

Hilton

Natascha Hendrichs
Senior Manager, Destination Marketing,
Continental Europe

Historic Highlights of Germany e.V.

Sascha Mayerer
Managing Director

Käthe Wohlfahrt

Takuma Wohlfahrt
Director of Brand Management &
Communication, Board of Directors

Kuoni Tumlare

JTB Germany GmbH
Monika Rieker
General Manager, Germany & Austria

Outletcity AG

Cornelia Koebele
Head of Destination Marketing &
Partnership Management

Hotelverband Deutschland e.V. (IHA)

Stefan Dinnendahl
Deputy CEO

Internationaler

Bustouristik Verband e.V. (RDA)

Benedikt Esser
RDA President; CEO, RDA Expo GmbH and
RDA Service GmbH

JCB International Ltd., German Branch

Till Weigl
General Manager

Magic Cities Germany e.V.

Armin Dellnitz
CEO

Maritim Hotelgesellschaft mbH

Ulla Schulz
Manager, International Sales Office

Mastercard Europe SA

Catharina Naatz
Business Development Manager,
Public Sector

Messe Berlin GmbH

Deborah Rothe
Exhibition Director, ITB Berlin

Novum Hospitality

Daniel Court
Corporate Director of Marketing

Passionsspiele Oberammergau Vertriebs GmbH & Co. KG

Gerhard Griebler
Managing Director

Sixt SE

Stefanie Penther
Senior Executive Manager
Associations & Partnerships

TUI AG

Bernd Hoffmann
Head of Public Policy/TUI Group Office Berlin

UNESCO-Welterbestätten

Deutschland e.V.

Fritz S. Ahrberg
Chairman

Value Retail Management

Germany GmbH

Christina Glavas
Director of Destination Marketing &
Partnerships

Visa Europe Management Services Ltd.

Julia Tönnemann
Senior Manager, Acceptance Development
Central Europe Region

Willy Scharnow-Stiftung

für Touristik
Detlef Altmann
Managing Director

GNTB contacts in the international markets

Regional Management North West Europe

Netherlands

Michaela Klare

michaela.klare@germany.travel
Tel: +31 (0) 651 327 589

GNTB foreign representative office Netherlands

Amsterdam Spaces Zuidas I (3176)
Barbara Strozziilaan 201
1083 HN Amsterdam

United Kingdom/Ireland

Harald Henning

harald.henning@germany.travel
Tel: +44 (0)20 7317 0912

GNTB foreign representative office United Kingdom/Ireland

22 Grosvenor Gardens
London SW1W 0DH

Belgium/Luxembourg

Lisa Berendsen

lisa.berendsen@germany.travel
Tel: +32 (0)499 693 283

GNTB foreign representative office Belgium/Luxembourg

Rue Joseph Stevens 7, 1000 Brussels

Regional Management North East Europe

Denmark

Bo Lauridsen

bo.lauridsen@germany.travel
Tel: +45 (0)33 436 818

GNTB foreign representative office Denmark

Amaliegade 13
1256 Copenhagen

Finland until (31 December 2024)

Bo Lauridsen

GNTB Denmark
bo.lauridsen@germany.travel
Tel: +45 (0)33 436 818

Marketing through

Valve Communications Oy

Norway (until 31 December 2024)

Joelle Janz

joelle.janz@germany.travel
Tel: +47 (0)22 128 229

GNTB sales and marketing agency

Norway

c/o Deutsch-Norwegische Handelskammer
Drammensveien 111 B, 0273 Oslo

Poland

Tomasz Pędzik

tomasz.pedzik@germany.travel
Tel: +48 (0)22 531 0528

GNTB sales and marketing agency Poland

c/o Deutsch-Polnische Industrie-
u. Handelskammer
ul. Grzybowska 87
00-844 Warszawa

Sweden (until 31 December 2024)

Iris Müller

iris.mueller@germany.travel
Tel: +46 (0)86 651 884

GNTB sales and marketing agency

Sweden

c/o Deutsch-Schwedische Handelskammer
Tyska Turistbyrå AB
Valhallavägen 185, 115 53 Stockholm

Regional Management South East Europe

Austria and Slovakia

László Dernovics

laszlo.dernovics@germany.travel
Tel: +43 (0)1 5132 79210

GNTB foreign representative office

Austria and Slovakia
Mariahilfer Strasse 54, 1070 Vienna

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

Cristian Sallai

cristian.sallai@germany.travel
Tel: +381 (0)11 655 5460

GNTB sales and marketing agency Balkans

c/o Danube Competence Center (DCC)
Regionalbüro
Knez Mihailova 30, 11000 Belgrade

Slovenia (until 31 December 2024)

Maja Horvat

maja.horvat@germany.travel
Tel: +386 (0)1 252 8855

GNTB sales and marketing agency

Slovenia

c/o Deutsch-Slowenische Industrie- und
Handelskammer
Poljanski nasip 6, 1000 Ljubljana

Czech Republic

Jan Pohaněl

jan.pohanel@germany.travel
Tel: +420 (0)2 2149 0374

GNTB sales and marketing agency

Czech Republic

c/o Deutsch-Tschechische
Industrie- und Handelskammer
Václavské náměstí 40, 110 00 Prague

Hungary (until 31 December 2024)

Miklós Czeiszing

miklos.czeiszing@germany.travel
Tel: +36 (0)1 345 7633

GNTB sales and marketing agency Hungary

c/o Deutsch-Ungarische Industrie-
und Handelskammer
Lövház u. 30., 1024 Budapest

Regional Management South West Europe

Spain/Portugal Ulrike Bohnet

ulrike.bohnet@germany.travel
Tel: +34 (0)91 360 0393

GNTB foreign representative office Spain/Portugal

San Augustin 2-1° derecha
Plaza de las Cortes, 28014 Madrid

Italy

Agata Marchetti

agata.marchetti@germany.travel
Tel: +39 (0)2 0066 7794

GNTB foreign representative office Italy

Foro Buonaparte 12, 20121 Milan

France

Bénédicte Richer

benedicte.richer@germany.travel
Tel: + 33 (0)1 4020 1703

GNTB foreign representative office France

8 rue de Milan, 75009 Paris

Switzerland

Stefan Mieczkowski

stefan.mieczkowski@germany.travel
Tel: +41 (0)44 213 2211

GNTB foreign representative office Switzerland

Freischützgasse 3, 8004 Zurich

Regional Management Americas/Israel

USA/New York

Ricarda Lindner

ricarda.lindner@germany.travel
Tel: +1 (0)212 661 7858

GNTB foreign representative office New York

1350 Broadway, Suite 440
New York, NY 10018

USA/Los Angeles

Fritzi Luca

fritzi.luca@germany.travel
Tel: +1 (0)424 309 0827

GNTB sales and marketing agency

Los Angeles

c/o Myriad Marketing
5800 Bristol Pkwy, Suite 660
Culver City, CA 90230

Israel

Ofer Kisch

ofer.kisch@germany.travel
Tel: +972 (0)35 135 307

GNTB sales and marketing agency Israel

c/o G.O Travel Advisor
Natan Yalin Mor 25
Tel Aviv 6701531

Goldi Müller (until 31 December 2024)

c/o Lufthansa German Airlines

Canada (until 31 December 2024)

Anja Brokjans

anja.brokjans@germany.travel
Tel: +1 (0)416 935 1896 ext. 224

GNTB sales and marketing agency Canada

c/o VoX International Inc
130 Queens Quay East, Suite 1200
Toronto, ON M5A 0P6

Regional Management Asia

Japan

Akira Nishiyama

akira.nishiyama@germany.travel
Tel: +81 (0)3 3586 0380

GNTB foreign representative office Japan

7-5-56 Akasaka, Minato-Ku
Tokyo 107-0052

India

Romit Theophilus

romit.theophilus@germany.travel
Tel: +91 (0)11 4937 1001

GNTB sales and marketing agency India

c/o Airplus Travel Services Pvt. Ltd.,
Vista House, 2nd Floor, C-11 Community
Centre Safdarjung Development Area,
New Delhi - 11001

Arab Gulf States

Yamina Sofo

yamina.sofo@germany.travel
Tel: +971 (0)4 447 0588

GNTB sales and marketing agency Arab Gulf States

c/o Deutsch-Emiratische Industrie-
und Handelskammer
Ubora Tower, 27th floor, Office 2701,
Al Abraj Street (Marasi Drive), Business Bay
P.O. Box 7480, Dubai, U.A.E.

China

Zhaohui Li

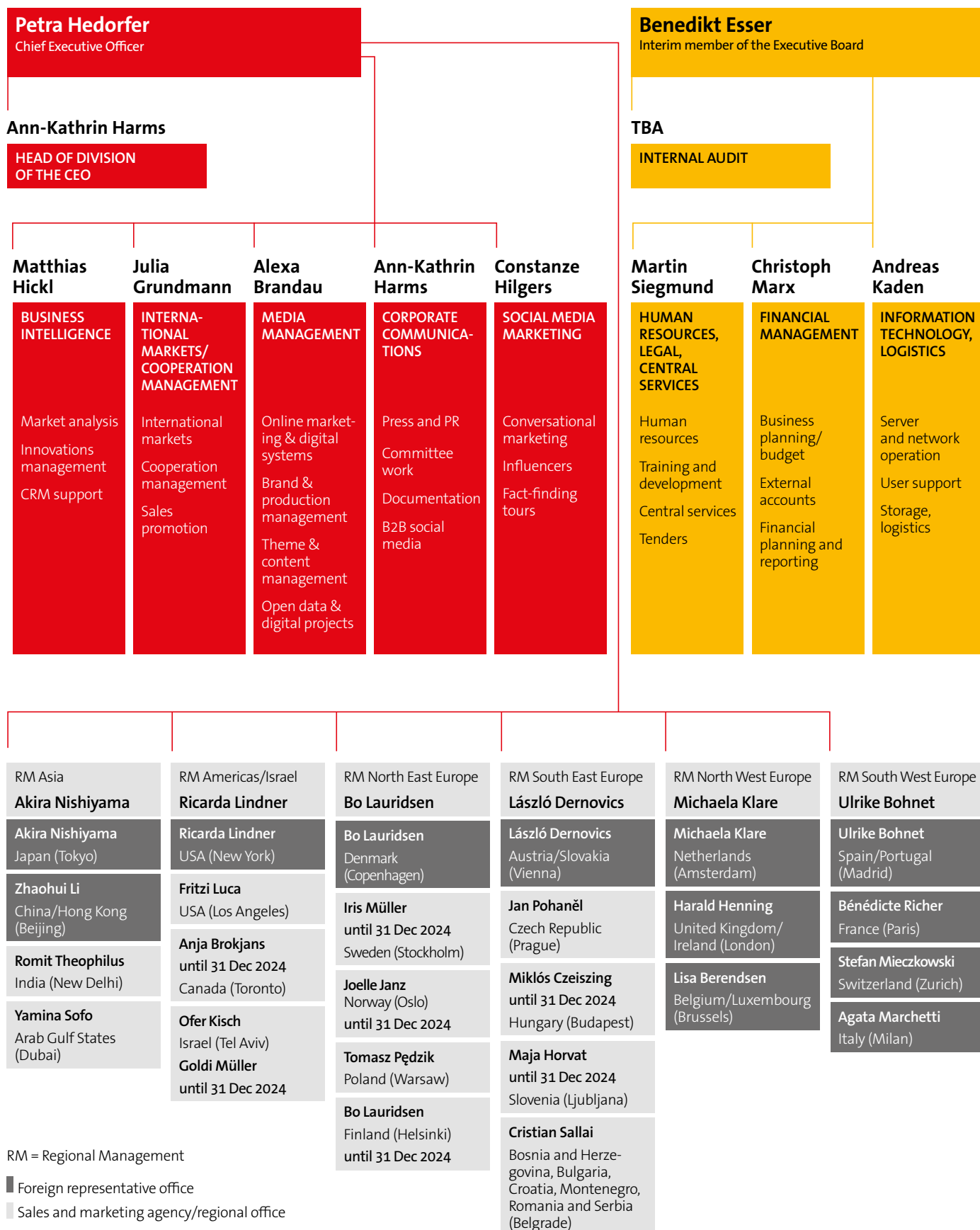
zhaohui.li@germany.travel
Tel: +86 (0)10 6590 6406

GNTB foreign representative office China

6th Floor, D1 Unit 602D, DRC Liangmaqiao
Diplomatic Office Building
19 Dongfang East Road, Chaoyang District,
100600 Beijing

Structure of the German National Tourist Board

As at April 2025



Production credits

Editor

Asger Schubert
M.A.D. Public Relations GmbH

Printed by

Druck- und Verlagshaus Zarbock GmbH & Co. KG
www.zarbock.de

Design

GNTB/Lilly Hummel

Translation

LingServe Ltd.
www.lingserve.de

Information correct as at 31 March 2025

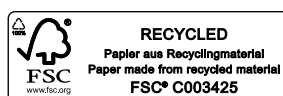
Photo credits, portrait photos

P. 4 Petra Hedorfer © GNTB/Farideh Diehl | **P. 5/108** Benedikt Esser © GNTB/Stefanie Kösling | **P. 6** Dieter Janeczek © Inga Haar | **P. 8/108** Brigitte Goertz-Meissner © Baden-Baden Kur & Tourismus GmbH | **P. 9/108** Michaela Kaniber © Nadine Keilhofer/StMELF | Reinhard Meyer © Benjamin Maltry/DTV | Guido Zöllick © Holger Martens | **P. 9/109** Klaus Laepple © GNTB | Ernst Fischer © axentis.de/Georg J. Lopata | **P. 85** Jana Schimke © Britta Konrad | Stefan Zierke © Maximilian König | **P. 86** Stefan Schmidt © Inga Haar | Nico Tippelt © Peter Adamik | **P. 87** Anja Karliczek © Sabine Braungart | Sebastian Münzenmaier © private | **P. 94** Christine Schönhuber © TMBW | Barbara Radomski © tourismus.bayern – Gert Krautbauer | Sabine Wendt und Burkhard Kieker © Dirk Mathesius | **P. 95** Christian Woronka © Sebastian Rost Fotografie | Oliver Rau © Lehmkuehler | Michael Otremba © Catrin Eichinger | Herbert Lang © Hessen Agentur | **P. 96** Tobias Weitendorf © Danny Golhke | Meike Zumbrock © TMN | Dr Heike Döll-König © Niels Freidel | Stefan Zindler © Dominik Ketz | **P. 97/108** Birgit Grauvogel © Dirk Guldner | **P. 97** Veronika Hiebl © Jan Gutzeit | Dr Robert Franke © Peter Gercke | Dr Bettina Bunge © 2020 Frank Peter | Christoph Gösel © Schröter/TTG | **P. 106** Johannes Walter © Lufthansa Group | Armin Dellnitz © SMG/Niedermüller | Thomas Ellerbeck © Aleksander Perkovic | Norbert Fiebig © DRV/Wyrwa | Stefanie Berk © Patrick Kuschfeld | Roland Mack © Baschi Bender |

P. 107 Gerhard Griebler © studioline Photostudio GmbH | Regine Sixt © private | Dr Volker Treier © Paul Aidan Perry | Dr Oliver Rengelshausen © Amadeus/Jürgen | Dr Armgard Maria Wippler © BMWK | Markus Siebels © BMF | Dr Marion Weber © private

Picture credits for other photos

P. 10/11 Getty Images/Images By Tang Ming Tung | **P. 12/13** Getty Images/Westend61 | **P. 20/21** AdobeStock/splitov27 | **P. 22/23** Adobe Stock/bongkarn | **P. 25** GNTB | **P. 26/27** AdobeStock/SdecoretMockup | **P. 28** Jens Wegener | **P. 29** Katrin Denkwitz | **P. 30** Jens Jeske | **P. 31** GNTB | **P. 32/33** Jens Jeske | **P. 34** Florian Trykowski | **P. 35** top: Tourismus Marketing GmbH Baden-Württemberg / Natalie Dietl | bottom: Björn Hake | **P. 36/37** GNTB | **P. 38** Dagmar Schwelle | **P. 39** Jens Wegener | **P. 40/41** Mitteldeutsche Zeitung / Andreas Stedtler | **P. 41** Francesco Carovillano | **P. 42** LTM | **P. 43** GNTB | **P. 44** Stadtmarketing Friedrichshafen GmbH/Stefan Trautmann | **P. 45** AdobeStock/panitan | **P. 46** GNTB | **P. 47** Dagmar Schwelle | **P. 48** GNTB | **P. 49** Dagmar Schwelle | **P. 50** AdobeStock/tippapatt | **P. 52/53** Jens Jeske | **P. 54** GNTB | **P. 82/83** Getty Images/rdonar | **P. 84** Westend61/Mel Stuart | **P. 90** Dagmar Schwelle | **P. 91** top: Francesco Carovillano | centre: Westend61/Daniel Ingold | bottom: Kulturdirektion Erfurt/Hans P. Szyska | **P. 92** Adobe Stock/Uwe | **P. 93** top: Florian Trykowski | bottom: AdobeStock/Avelina Studio | **P. 98/99** Getty Images/Westend61 | **P. 108** Florian Trykowski



Published by:

German National Tourist Board (GNTB)
Beethovenstrasse 69
60325 Frankfurt am Main

www.germany.travel

Supported by:



on the basis of a decision
by the German Bundestag



German National Tourist Board (GNTB)
Beethovenstrasse 69
60325 Frankfurt am Main, Germany

Tel: +49 (0)69 974 640
Fax: +49 (0)69 751 903
info@germany.travel



www.germany.travel