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2023 INBOUND TOURISM

Sustainable | Digital | Global

ANNUAL REPORT



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in Germany and
the markets



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Destination Germany's position
in the international market



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**Dear reader,
dear partners in travel to Germany,**

The context in which we look back at 2023 is characterised by positives and negatives. On the one hand, our market research has highlighted people's desire – wherever they are in the world – to travel following the lifting of coronavirus-related restrictions. As the rate of inflation fell sharply in key European source markets and in North America, the travel industry entered the first quarter with great optimism that it can improve the current level of business, which had deteriorated during the recent years of crisis.

On the other hand, there has been a dramatic increase in geostrategic conflicts around the world. Russia's war in Ukraine and the war in the Middle East have brought immeasurable suffering to the population, and they are also having an impact on global tourism. Important source markets have been cut off from international travel, invaluable infrastructure is being destroyed, and the economic fallout is taking its toll on consumer and travel behaviour. Added to that are the effects of climate change, which are resulting in more and more extreme weather events and affecting popular tourism destinations.

Global tourism has once again proven resilient in the face of multiple challenges. The United Nations tourism organisation, UN Tourism, market research experts and representatives from the travel industry expect growth in 2024 to pick up where it left off in 2019, which was a record year. Germany is well positioned to play its part in shaping this development.

After all, there is more to tourism than travel. Against a backdrop of international conflict, engagement with other cultures plays a key role in promoting understanding among nations. Our main objective remains to present Germany as a tolerant, cosmopolitan, peaceful and safe travel destination.

There are many important facets to this: the high esteem in which the Destination Germany brand is held in the international market, our attractive tourism offering in the growing city break and cultural travel segment, and our reputation for sustainability and for being a destination that offers excellent quality and good value for money.

In this annual report for 2023, we provide a compact overview of the GNTB's activities through which we, together with our partners in the international travel trade and in tourism to Germany, have faced the new challenges presented to us.

We continued to press ahead with the digital transformation in the year under review, culminating in the Knowledge Graph, a joint project with our partners in the regional tourism organisations and the Magic Cities, which went live in the summer of 2023. The tourism industry's largest data infrastructure project improves the visibility of our tourism offering across countries and organisations, and boosts our competitiveness in the international market. It also provides the basis for AI-assisted applications and services, thus opening up opportunities for new business models and start-ups. Our Thin(gk)athon in November showed how this might work in practice, as will the first use cases our foreign representative offices are implementing in partnership with the travel industry in 2024.

Good progress has been made with our sustainability strategy. Examples of this include our Sustainable Travel Trends to Germany dashboard, the introduction of the EMAS environmental management system and the GNTB becoming a member of the Global Sustainable Travel Council (GSTC). Germany's reputation as a sustainable, high-quality destination was further enhanced by our well-received global campaigns '51 UNESCO World Heritage Sites', 'Embrace German Nature' and 'Simply Feel Good'.

The 'Stay a little bit longer' initiative brings together important aspects of our sustainability strategy, such as promoting green tourism by extending the length of stay and thus reducing the carbon footprint per day of holiday. These longer stays increase economic value creation, boost off-peak travel and support tourism in rural regions.

The number of overnight stays by foreign visitors in 2023 rose year on year by 18.9 per cent to 80.9 million, reaching 90.0 per cent of the pre-coronavirus record set in 2019. The GNTB Travel Industry Expert Panel confirms a growing optimism about inbound tourism to Germany in 2024.

WE CONTINUED TO PRESS AHEAD WITH THE DIGITAL TRANSFORMATION IN THE YEAR UNDER REVIEW.



Petra Hedorfer
Chief Executive Officer



Reinhard Werner
Commercial Director
Retired on 31 October 2023



Stephanie Heidenreich
Commercial Director
1 August 2023 to 31 January 2024

The GNTB's core tasks are to promote Destination Germany and position it as a cosmopolitan and sustainable destination in the international market, to network and share knowledge, and to support Germany's tourism industry – which predominantly comprises small and medium-sized enterprises – in global tourism markets.

We need ongoing support if we are to fulfil this ongoing mission. The Executive Board is particularly grateful to the decision-makers in government, the members of the German Bundestag's Tourism Committee, the Federal Ministry for Economic Affairs and Climate Action (BMWK), and Member of the German Parliament Dieter Janecek in his role as Federal Government Coordinator for Tourism. The increase in federal funding in 2024 will allow us to step up our activities in our core areas of action – business intelligence, digital transformation, green travel and inclusivity – and continue to shape the future of inbound tourism to Germany. On behalf of the entire Executive Board, I would like to thank the staff of the GNTB at head office and in the foreign rep-

resentative offices and sales and marketing agencies around the world for all their hard work in difficult circumstances.

Finally, I would like to thank our committees, most of all the Board of Directors and its President, Brigitte Goertz-Meissner, and Vice Presidents Michaela Kaniber, Reinhard Meyer and Guido Zöllick, and the marketing committee and Advisory Board. They have supported the GNTB in word and deed, and shown great appreciation for the work we do.

A handwritten signature in black ink that reads "Petra Hedorfer".

Petra Hedorfer

**# INBOUND TOURISM
IS ONCE AGAIN A
CORNERSTONE OF THE
ENTIRE GERMAN
TOURISM INDUSTRY.**



Dieter Janecek
Federal Government Coordinator for Tourism

Dear reader,

Striking a balance between the needs of the economy, the environment and society is a critical challenge for our national economy, and thus for the tourism industry as well.

The federal government is pursuing its goal of making tourism more sustainable, green, fair and innovative by continuously refining the national tourism strategy and establishing the national Future of Tourism platform, and by supporting the German Climate Fund for Tourism and the LIFT Klima and LIFT Transformation funding programmes.

Our climate targets are ambitious, and we aim for Germany's economy to be climate-neutral by 2045. Research shows that tourism currently accounts for up to 8 per cent of all carbon emissions, so it too will need to play its part. There is still plenty to do in this regard, especially as the progress made in decarbonisation in recent years has been eroded by the sheer growth in tourism.

We are fully aware of how important tourism is to the national economy. Before the coronavirus pandemic, it supported around three million jobs in Germany and accounted for 4 per cent of economic gross value added. And given the current geopolitical tensions, one cannot overstate the contribution that travel makes to openness and understanding among nations by facilitating interaction with other cultures.

The GNTB's hard work in marketing Germany as a travel destination around the world is bearing fruit. Visitors from abroad made over 80 million overnight stays in Germany in 2023, ensuring that inbound tourism is once again a cornerstone of the entire German tourism industry. The number of international visitors has steadily risen since the end of the coronavirus pandemic, while Germans have travelled abroad more and more. By the end of 2023, inbound tourism to Germany accounted for around 17 per cent of the market, approaching the pre-pandemic levels of 2019. This creates stability for the mostly small and medium-sized companies in the catering and hotel industry, for the transport sector, for leisure and cultural facilities, and for many other tourism service providers.

The sustainability strategy, through which the GNTB has been positioning Germany as a sustainable destination in the international market for many years, has also proven its worth. The international travel trade is increasingly viewing Germany as a destination for sustainable travel, and marketing it accordingly. Given the rising global demand for green travel, the outlook for the years ahead is looking very promising.

The digital transformation remains a topic of great importance for the future. It increases our ability to compete in a world of globalised sales channels, enables the development of smart destinations and tailored tourism services, and can make an invaluable contribution to sustainable tourism. Working with a multitude of partners, the GNTB has created the Open Data/Knowledge Graph as a cross-border and cross-organizational digital infrastructure project that is a first in Germany.

I would like to encourage all partners in Germany's inbound tourism industry to take an active role in the evolution of this project. The inclusion of as much data as possible about transport, hospitality, sights, tourism services and barrier-free offerings ensures that the scope and variety of Germany's tourism offering is made visible. This increases the opportunities for lesser-known regions and rural areas, and opens up new possibilities for AI-based applications that rely on semantically structured, open data.

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. I can assure you that the German government will continue to support your efforts.



Dieter Janecek

THE GNTB'S WORK IS VERY WELL RECEIVED AT HOME AND ABROAD.



BRIGITTE GOERTZ-MEISSNER
President of the Board of Directors
of the German National Tourist Board

Dear reader,

We are living in exceptionally turbulent times, and global tourism is affected in many different ways. On the one hand, people around the world have a growing desire to travel again and experience other countries and cultures. On the other, the travel industry is facing significant challenges, such as difficult economic conditions in key source markets, geostrategic conflicts, climate change, increased competition between destinations and the rapid progress of digitalisation, which has already reached all levels of the tourism value chain.

In this annual report for 2023, the GNTB has once again outlined how it is tackling its present-day tasks while using its powers of innovation to drive the future of tourism to Germany.

The main theme last year was overcoming the aftermath of the coronavirus pandemic and integrating the lessons learnt from what is probably the biggest and most comprehensive crisis in international tour-

ism to date into the work of marketing Germany as a travel destination worldwide.

Nearly 81 million overnight stays by foreign visitors are proof that the GNTB's recovery strategy is a success. This strategy features three pillars: market research and analysis of changing customer demand, networking and sharing knowledge to support Germany's SME-dominated tourism industry, and enhancing Destination Germany's brand profile with a focus on sustainability and climate action.

The GNTB achieved major progress in all three areas in 2023. Research into market-specific Sinus milieus ensures that target groups can be identified and addressed with greater precision, digital dashboards help partners in Germany's inbound tourism industry to target their international marketing activities, and the Open Data/Knowledge Graph project is a milestone in the digital transformation of the entire Germany tourism industry and got off to a great start.

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.)

Memorable global campaigns such as ‘51 UNESCO World Heritage Sites’, ‘Embrace German Nature’ and ‘Simply Feel Good’ have expertly showcased our country’s tourism appeal, and numerous market-specific campaigns and initiatives have inspired potential visitors to get a real feel for Germany.

The GNTB’s work has been very well received at home and abroad, and has garnered many awards and accolades.

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 also like to thank our partners, the decision-makers in government, for their unwavering support: the Federal Ministry for Economic Affairs and Climate Action (BMWK) and Member of the German Parliament Dieter Janecek in his role as Federal Gov-

ernment Coordinator for Tourism, and the German Bundestag’s Tourism Committee chaired by Jana Schimke, also a Member of the German Parliament. The increase in the GNTB’s funding sends a welcome signal to the many small and medium-sized companies in the industry.

The Board of Directors firmly supports the GNTB’s approach in shaping the future of inbound tourism to Germany through digitalisation and green transformation as its key areas of action.

Brigitte Goertz-Meissner

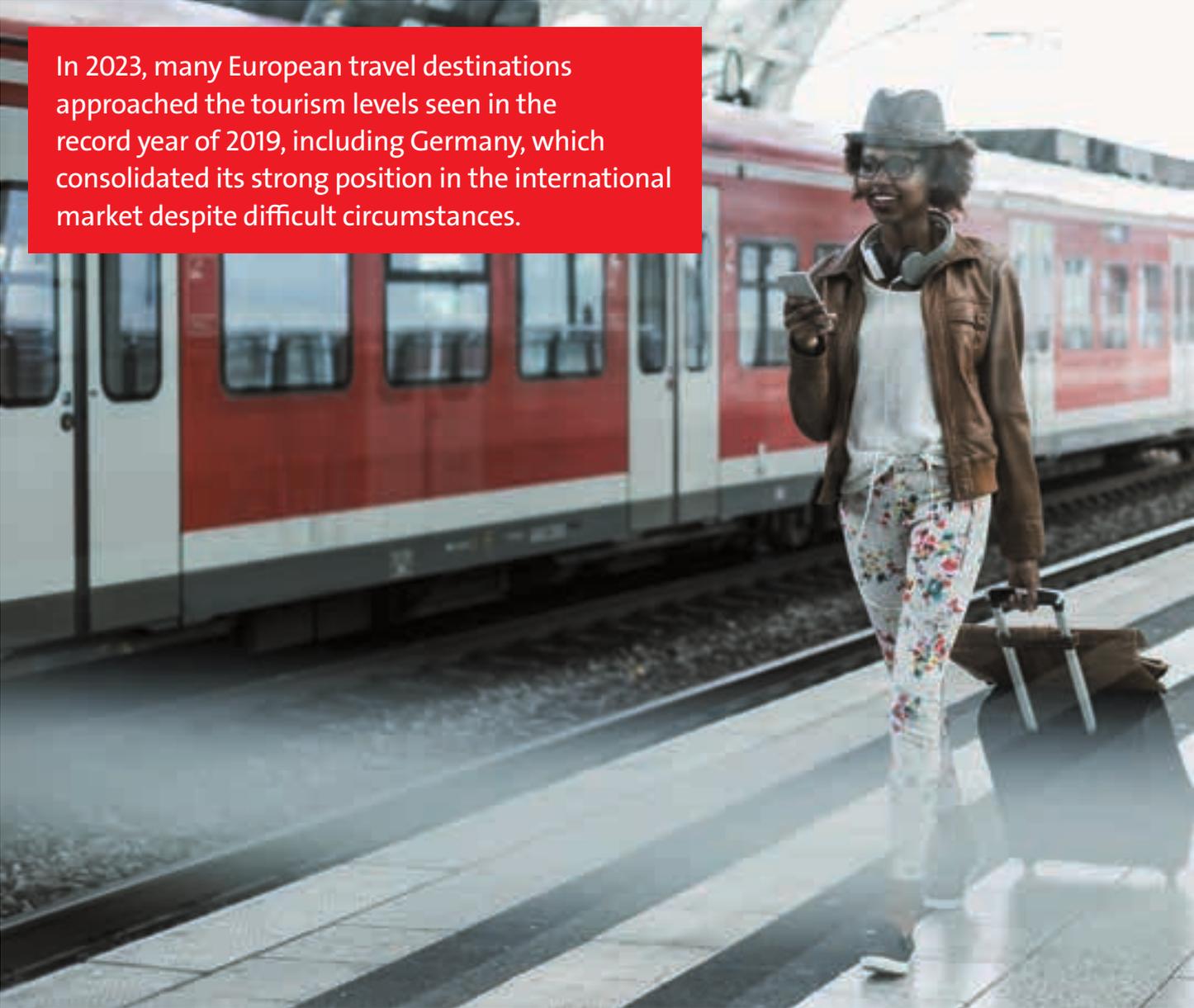


Global tourism in 2023 was dominated by a wide range of events and contrasting trends. While people were keen to make up for holidays lost to the coronavirus pandemic in 2020 to 2022, inflation, the energy crisis and geopolitical conflicts all had an adverse impact. The travel industry is taking account of the changes in consumer behaviour by integrating the challenges of digitalisation and green transformation into its business models.



DESTINATION GERMANY

in the international market in 2023



In 2023, many European travel destinations approached the tourism levels seen in the record year of 2019, including Germany, which consolidated its strong position in the international market despite difficult circumstances.

Uptrend in international travel

Global tourism in 2023 – return to pre-pandemic levels in sight

The United Nation's tourism organisation, UN Tourism, expects there to have been around 1.3 billion international tourism arrivals worldwide in 2023, which equates to 88 per cent of the record set in 2019. This is the finding of its latest tourism barometer from January 2024, which goes on to predict that global tourism will have recovered completely by the end of 2024.

Europe's destinations boosted by intracontinental travel and visitors from the USA

Once the pandemic-related restrictions were lifted, interest across Europe shifted from domestic and cross-border travel to international travel within Europe. The resumption of flights supported the long-haul travel segment.



2024

Recovery expected above pre-pandemic levels

European destinations also benefited from the influx of US tourists, which was boosted by favourable exchange rates. However, two-thirds of European destinations failed to reach 2019 levels in 2023.

Arrivals in 2023 compared to 2019

96.6 %

Europe, total

86.7 %

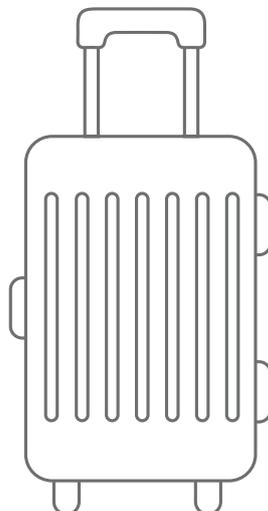
Germany

Source: ETC Tourism Trends and Prospects, Quarterly, November 2023.

Travel destinations for Europeans, market share in 2022 vs. 2023

+1.7 percentage points
Other European countries
up from 26.4 % to 28.1 %

-3.3 percentage points
Neighbouring countries
down from 35.5 % to 32.2 %



-3.5 percentage points
Domestic
down from 28.5 % to 25 %

+2.7 percentage points
Long-haul travel
up from 7.7 % to 10.4 %

Comparison of the European Travel Commission's Monitoring Sentiment for Intra-European Travel (MSIET) survey, September 2022 vs. September 2023

Destination Germany records double-digit rise in inbound tourism

The number of overnight stays by foreign visitors to Germany gradually recovered in 2023, and by autumn held steady at around 90 per cent of the record levels seen in 2019.

80.9 million

overnight stays in Germany by international visitors, up 18.9 % on 2022

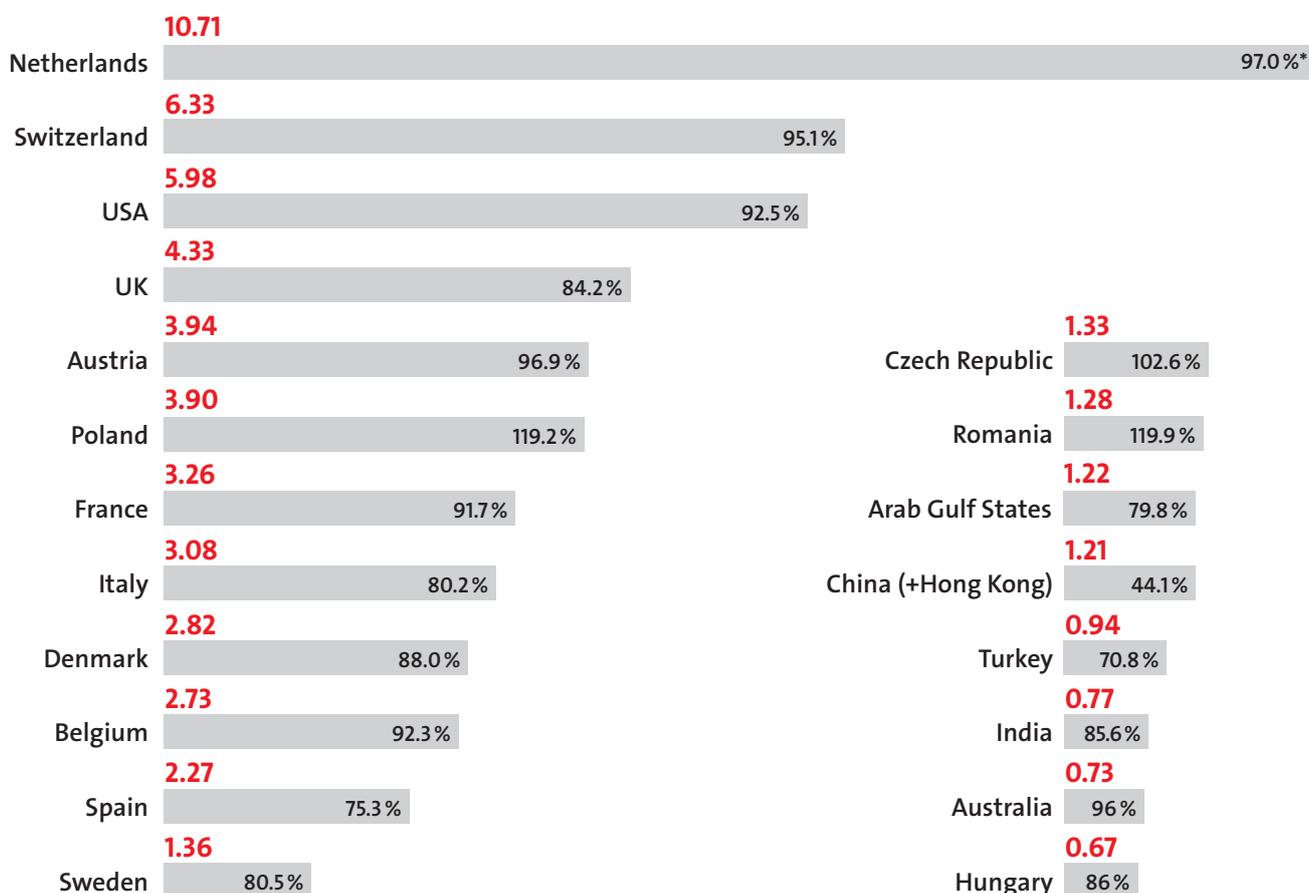
The Europe-wide trend for intracontinental travel also confirmed the importance of inbound travel for tourism in Germany overall. While the proportion of overnight stays by foreign visitors on campsites and in hotels and guesthouses with at least ten beds fell from over

18 per cent to around 10 per cent during the pandemic in 2020 and 2021, inbound tourism once again accounted for a share of more than 16 per cent in 2023.

As in 2022, Europe was the driver of the recovery of tourism to Germany in 2023, with 92.8 per cent of 2019 levels reached by November. Traditionally strong European source markets proved particularly robust during the recovery phase, with the Netherlands, Switzerland and Austria catching up with the record figures from 2019, and Poland, Romania and the Czech Republic even setting new records in 2023.

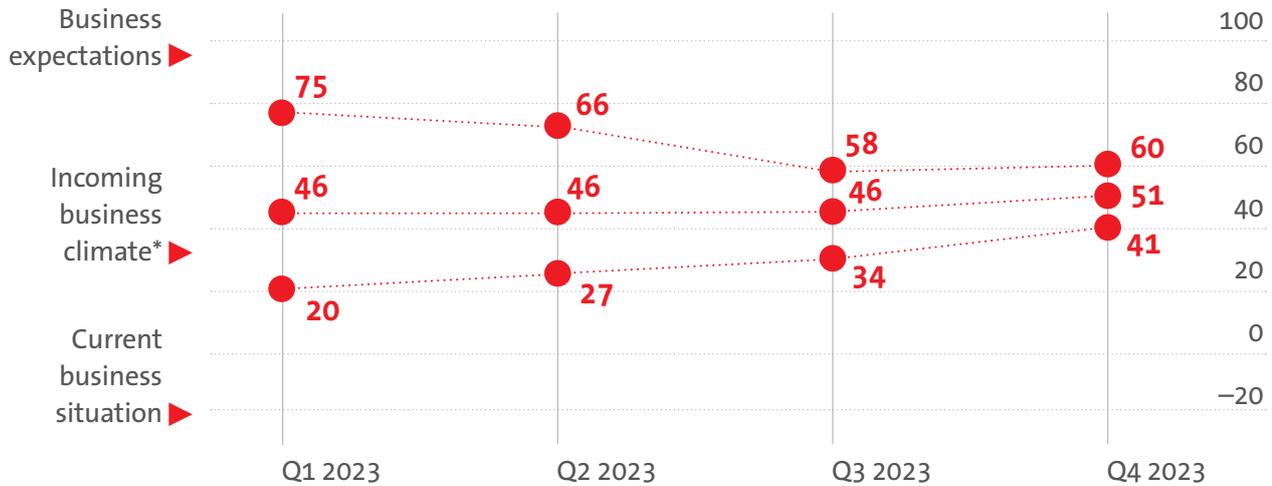
In the same period, the overseas markets reached 80.0 per cent, with the USA contributing more than most to the return to pre-pandemic levels with a recovery of 92.5 per cent. India and the Arab Gulf States also returned to growth, while the recovery of travel from China and Japan was delayed in 2023.

The top source markets for inbound tourism to Germany and their rate of recovery in 2023 compared to 2019



* Provisional data for the period Jan–Nov 2023 compared with Jan–Nov 2019. Source: Federal Statistical Office 2023; accommodation statistics incl. camping.

**GNTB Travel Industry Expert Panel:
Business climate in Germany for international travel trade
improves moderately at the end of the year**



* The incoming business climate combines the balance of the current business situation and the future business expectations of international experts for inbound tourism to Germany, value range +100 to -100. Source: GNTB Travel Industry Expert Panel. Experts are international CEOs and buyers (tour operators, travel agencies, OTAs). Q1/2022 – Q4/2023 (respondents = 213–262), reference months July, October 2022. January, May, August, November 2023.

Inbound tourism to Germany in 2023 reflects the high expectations of the international travel industry

Every quarter, the GNTB’s Travel Industry Expert Panel surveys approximately 250 CEOs and key accounts of international tour operators and travel portals that do business in Germany. The respondents’ business expectations in the first quarter of 2023 reached 75 points, a new record high since the end of the coronavirus pandemic.

This corresponds to the assessment of the current business situation, which had fallen to 20 points in the face of multiple challenges such as inflation, the energy crisis and geostrategic conflicts. Despite these difficult conditions, Germany’s appeal as a destination and consumer demand for travel were so high that the figures for the current business situation doubled over the course of the year. Nevertheless, the economic and po-

litical situation is affecting the mood, and expectations for the six months ahead are somewhat more cautious. Overall, the business climate improved significantly from 39 to 51 points year on year.

**# EUROPEAN MARKETS
CONTINUE TO DRIVE
THE RECOVERY OF
INBOUND TOURISM
TO GERMANY.**

Germany is held in high regard as a holiday destination and a location to set up business

As a brand, Germany continued to be held in high regard around the world in 2023, which was reflected by its second-place ranking in the Anholt-Ipsos Nation Brands IndexSM, a comparison of 60 countries. Germany once again came out top among the 27 European countries in the overall ranking, and defended its top position in the benchmark without recording a fall in any of the six sub-indices that were reviewed. In the tourism segment, it remained in eleventh place, while it climbed one place to fifth in the culture segment.

The global perception of Germany as a tourist destination is particularly positive among 30 to 44-year-olds, followed by 18 to 29-year-olds. Across all age groups, 'historic buildings' and 'vibrant cities' have a significant influence on how tourism in Germany is rated, while the statement 'visit if money no object' is particularly prevalent among 18 to 29-year-olds.

High customer satisfaction equals many recommendations

In its brand communications, the GNTB focuses on linking sustainability with quality tourism. This aligns with the 'build back better strategy' put forward by the World Tourism Organization during the coronavirus pandemic. The success of this strategy is reflected in the findings of the Quality Monitor survey of the German tourism industry, for which DWIF Consulting surveys international visitors on behalf of the GNTB during their stay in Germany.

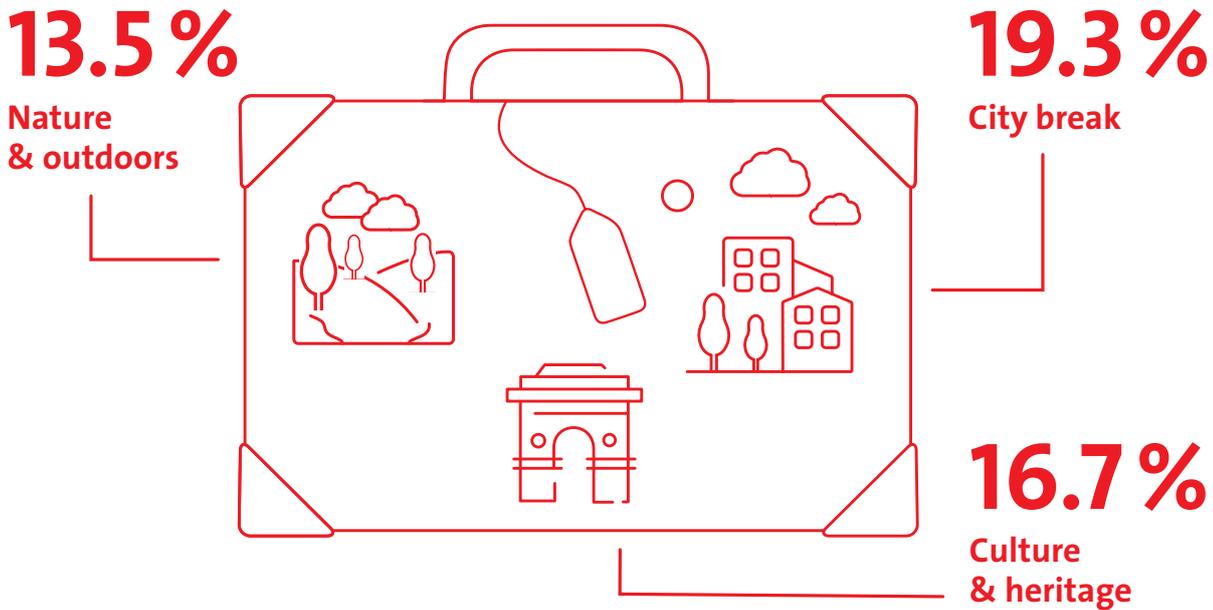
Respondents gave Germany an overall rating of 2.0 – on a scale of 1 (delighted) to 6 (disappointed) – for the survey period from May 2022 to October 2023. The aspects 'quality and choice of the offering', 'accommodation' and 'eating out' were rated particularly highly at either 1.8 or 1.9, the score for 'opening hours' was around the average, and only 'value for money' was rated slightly less favourably, at 2.2.

Nation Brands Index: Germany ranked second worldwide in 2023 after eight years at the top



Source: Anholt-Ipsos Nation Brands IndexSM 2023, October 2023, 60 countries worldwide.

City breaks, cultural travel and nature holidays remain the favourite type of getaway for Europeans



Source: ETC Monitoring Sentiment for Intra-European Travel, Wave 17, October 2023.

The overall and detailed results differ only marginally from the pre-coronavirus surveys conducted between May 2018 and April 2019. Accordingly, international visitors continued to recommend Germany as a travel destination in 2023. The Net Promoter Score – on a scale from –100 to +100 – stood at a healthy 52 points between May 2022 and October 2023.

Europe-wide trends boost Germany's leading position in key travel segments

Cities and culture see continued growth

Among Europeans, Germany is firmly established as the top destination for city breaks and cultural travel. Of the 140 million outbound cultural trips made by Europeans in 2022, 16.4 million were to Germany, according to IPK International. This equates to a market share of 12 per cent, ahead of France, Italy and Spain. City breaks and cultural tourism were particularly popular with Europeans in 2023. According to the European Travel Commission's Monitoring Sentiment for Intra European Travel survey from October 2023, 'city breaks' were the most in-demand travel segment at 19.3 per cent, followed by 'culture & heritage' at 16.7 per cent and 'nature travel' at

13.5 per cent. Interest in city breaks remains high year on year, and cultural travel and multi-destination tours are growing, but demand for 'sun & beach' and 'coast & sea' has fallen slightly.

This trend is also reflected in tourism to Germany. The Federal Statistical Office's figures show that major urban areas performed particularly well, with the Magic Cities recovering to 91.5 per cent of the 2019 figure for overnight stays by international visitors between January and November 2023, while the figure across Germany was slightly lower at 88.6 per cent. The share of the total volume of overnight stays by international visitors accounted for by cities with a population of 100,000 or more, which stood at 56 per cent in the first eleven months of 2019, was back at 56 per cent in the same period in 2023.

AMONG EUROPEANS, GERMANY IS FIRMLY ESTABLISHED AS THE TOP DESTINATION FOR CITY BREAKS AND CULTURAL TRAVEL.

Sustainability shapes image with customers and the travel trade

International awareness and appreciation of Germany's commitment to sustainability and climate action continued to rise in 2023. This is reflected in an even higher ranking in the SDG Index, which measures progress in reaching the UN's climate targets, and the top ten ranking in the Nation Brands Index when it comes to protecting nature and the environment. As a result, Germany further consolidated its position in the international market as a sustainable holiday destination. According to the latest GNTB Travel Industry Expert Panel, 79 per cent of CEOs and key accounts viewed Germany as a sustainable destination at the end of

2023, up two percentage points since the start of the year. The proportion of respondents who specifically market Germany as a sustainable destination rose from 59 to 62 per cent over the course of the year.

However, according to research by IPK International conducted in September 2023, there is still an attitude-behaviour gap, with 73 per cent of travellers stating that a lack of sustainable offerings could be a reason not to visit a destination. 29 per cent of international travellers are already booking sustainable offerings.

2023: Germany already has a reputation for sustainability around the world



29%

of international travellers already book sustainable offerings

Ranked 3rd

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

In the Top 10

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

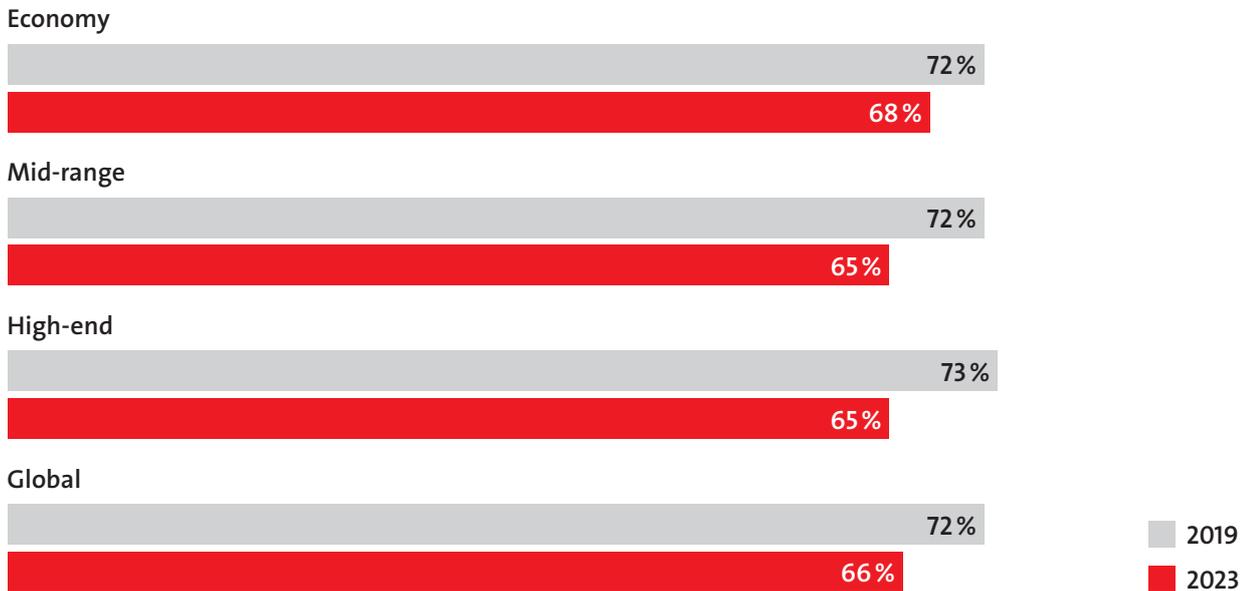
Ranked 4th

Germany's ranking in the SDG Index*

Sources: *SDG Index 2023; **IPK International, September 2023; ***Anholt-Ipsos Nation Brands IndexSM 2023.

Greater price sensitivity: proportionally, the occupancy rate in the economy segment was significantly higher in 2023 compared to 2019

Occupancy rate of hotels in Germany



Source: MKG Consulting, January to December 2023.

Rising prices are influencing supply and demand

According to the Ipsos Global Advisor from September 2023, inflation is the issue that worries respondents the most around the world (38 per cent), ahead of crime and poverty. This was a key factor in international tourism trends in 2023.

Wave 17 of the ETC's Monitoring Sentiment for Intra-European Travel survey found that rising travel costs are the biggest concern for European travellers, ahead of the economic situation and extreme weather events.

And according to the ETC's Long Haul Travel Barometer, high cost is the factor most frequently cited in the overseas markets as the reason for not visiting Europe. Nevertheless, holidays abroad continue to feature prominently in consumer spending, second only to food and health, but ahead of housing and leisure, domestic holidays and clothing, reveals a survey in 27 GNTB markets conducted by IPK International on behalf of the GNTB in October 2023.

In fact, the IPK 'trend telegram' shows that European travellers to Germany spent €744 per person per trip in the first eight months of 2023, significantly more than the 2019 figure of €639.

Research by MKG Consulting on behalf of the hotel industry shows that growing price sensitivity in supply and demand has an influence on Germany's competitiveness as a destination.

- At €126 per night, average hotel prices in Germany are considerably lower than many European competitors.
- Occupancy rates are lower – to some extent due to the slower recovery of the business travel segment – than in traditional holiday destinations such as Italy, Spain and Austria.
- The economy segment has a higher occupancy rate than hotels in the mid-range and high-end segments.



The GNTB has developed a forward-looking strategy and activities aimed at overcoming the current challenges in global tourism. This work is underpinned by the evidence-based analysis of markets, trends and potential customers. Building on this, the GNTB is stepping up the sharing of knowledge in a steadily growing network of partners in the international travel industry and in tourism in Germany. Global campaigns and market-specific initiatives are designed to sharpen the profile of the Destination Germany brand.

A high-speed train is stopped at a station platform. The train has a white upper body and a prominent red stripe. Large windows reflect the station's glass and steel structure. A red banner with white text is overlaid on the train's side. Below it, a white banner with red text is also overlaid. The platform has a tactile paving strip in the foreground.

THE GNTB'S ACTIVITIES

in Germany and the markets

The GNTB activities are shaped by key issues for the future, with the global marketing of Destination Germany informed by business intelligence, digital innovation, climate action and inclusivity.



A new GNTB dashboard provides the latest data on sustainability in inbound tourism

Using business intelligence to shape the tourism of tomorrow

By focusing on technological advances, customer requirements and the ongoing adaptation of its corporate strategy, the GNTB is paving the way for inbound tourism that is both competitive and sustainable. The GNTB's key areas of action in this context are business intelligence, digital transformation, climate action, sustainable tourism and inclusivity. These areas shaped the strategic direction of the GNTB's activities in 2023.

Analysis of Sinus-Meta-Milieus® supports sustainability strategy in marketing

The GNTB's sustainability strategy is adapting to changing travel behaviour and consumer values. Research by the Sinus Institute further shows that climate action is increasingly the overarching factor for those adopting a values-based lifestyle. Authenticity,



mindfulness and an interest in cultural values are becoming ever more important. In 2023, to better target potential customers in international source markets for inbound tourism to Germany, the GNTB worked with the Sinus Institute to establish travel-related values – in the context of sustainability and culture – across 19 countries. On the basis of this research, the GNTB will now be focusing its marketing activities on addressing Sinus-Meta-Milieus® with an above-average interest in sustainable travel. The two milieu groups that will be important going forward under this consolidated approach are ‘Intellectuals, Established and Performers’ and ‘Progressive Realists and Cosmopolitan Avantgarde’.

The research indicates that Germany is a very popular holiday destination. Across all of the milieus in the source markets that were analysed, 25 per cent of respondents had already been on holiday in Germany in

the past five years. Looking to the future, 77 per cent of respondents cite Germany as a potential holiday destination over the coming five years.

The GNTB’s ‘Sustainable Travel Trends to Germany’ data dashboard focuses on sustainability

The GNTB’s new ‘Sustainable Travel Trends to Germany’ data dashboard complements the ‘Inbound Travel Trends Germany’ dashboard, which displays key market-specific indicators and was launched in October 2021. Working closely with Breda University of Applied Sciences in the Netherlands, the GNTB developed approaches to calculating CO₂ equivalents that will enable it to quantify, measure and present the more complex effects of greenhouse gases as well.

The new dashboard provides users with detailed information from three perspectives:

- The general attitude of consumers in source markets with regard to culture, climate action and interest in sustainable travel
- The perception of Germany as a sustainable destination and its positioning in the European competitive arena
- The actual travel behaviour with regard to sustainability, for example the relevance of multi-destination tours, length of stay, tourism density and the CO₂-equivalent emissions from transport

Together, these two business tools provide the GNTB’s partners with a quick and effective overview of relevant data that enables them to further adapt their business activities with sustainability in mind. The new dashboard was presented to the trade and went live for members and sponsors as part of the GNTB’s Sustainable Tourism Day. The GNTB also presented the new tool’s capabilities to UN Tourism and the World Travel and Tourism Council as part of its efforts to share knowledge and information across borders.

19 countries
Exclusive survey of
Sinus milieus in 19 countries

The GNTB enters the metaverse to provide inspiration for holidays in Germany

As part of its digital strategy, the GNTB continuously explores new communication channels and platforms along the entire tourism value chain. It assesses technological innovations in terms of their practical use and initiates pilot projects, the findings of which are shared with the GNTB's partners.

38 %

User engagement

The metaverse presents a golden opportunity to promote Destination Germany in the digital world, and even offer real-world marketing options. Marketing in the metaverse reaches potential customers who are already active in the virtual world. In return, the marketer gains a very detailed understanding of the user experience. People's behaviour can be analysed to an unprecedented degree, which facilitates performance monitoring and provides invaluable insights for future project development.

In 2023, the GNTB expanded the Decentraland test project it launched in 2022. This metaverse, which is not affiliated with any company, is based on the Ethereum cryptocurrency, a green blockchain that promotes energy-saving technologies and thus feeds into the GNTB's sustainability strategy.



The GNTB in Decentraland

Experiencing Germany in the metaverse:

- Digital advertising space with themed ads and videos promoting Destination Germany
- GNTB-branded Germany stand
- Marketing via Decentraland's internal channels and on social media
- Branded digital jackets (wearables) given to 1,000 digital visitors who now act as influencers and brand ambassadors for Destination Germany in the virtual space

'Nature Experience in Germany' virtual reality experience with new features

Last year, new experiences were added to the app launched with great success in 2022. People can now simulate the many options available on an active holiday in Germany and thus be inspired to visit the country's natural landscapes. The app, which was initially used at international GNTB events, is now available to download from Meta and other providers and won the X.Award from the Digital Tourism Think Tank in 2023.

Conversational interfaces enhance the communications toolbox

The voice is becoming an increasingly important input/output medium for communications between humans and digital devices, which is why the GNTB is increasingly using audiovisual media such as AI-assisted chatbots. The German Travel Secrets app for smart speakers, for example, offers podcasts and audio experiences that share travel tips for less well-known regions and places of interest. In the 'German.Local.Culture.' campaign, a chatbot targets users with regional offerings in German towns and cities, from traditional crafts and customs to culture, architecture and experiences in the surrounding rural areas.

Furthermore, voice assistants and other conversational interfaces can make it easier for people with disabilities to access tourism offerings because of their use of AI and access to the latest data.



Alexa Brandau (GNTB), Armin Dellnitz (Magic Cities), Petra Hedorfer, Andreas Braun (Baden-Württemberg regional tourism office) at the go-live of the Knowledge Graph

GNTB Open Data/ Knowledge Graph project

Go-live of the German tourism industry's knowledge graph opens up new opportunities for inbound tourism

The GNTB initiated the Open Data/Knowledge Graph project and implemented it in collaboration with the regional tourism organisations and many other partners at the end of 2018. It contributes to the German government's data strategy of putting in place high-performance, sustainable data structures, making data use innovative and responsible, improving data literacy and establishing a data culture.

The Knowledge Graph went live during the GNTB's Advisory Board meeting on 28 June, which was also attended by representatives of the project partners. At the time it was launched, the Knowledge Graph provided access to more than 200,000 current, high-quality data sets.

OVER 200,000 CURRENT DATA SETS AVAILABLE.

The GNTB will be stepping up data distribution by building and expanding contacts to potential data users. Data from the Knowledge Graph is also being used in the GNTB's own channels, for example to train the AI-assisted chatbot Anja at www.germany.travel.

The technical infrastructure has been designed to seamlessly link open-data projects at regional level, including ThüCat, SaTourN and Bayern-Cloud. Other organisations such as the German Convention Bureau (GCB) can also work with the infrastructure. The next step is to make timetable data for trains and buses available via an interface.

A KEY GOAL OF THE GNTB KNOWLEDGE GRAPH, NAMELY TO DRIVE NEW BUSINESS MODELS AND INCREASE THE REACH OF TOURISM CONTENT, HAS ALSO BEEN PARTIALLY IMPLEMENTED.

Since the Knowledge Graph went live, the GNTB's international offices have established links to potential partners who want to draw on the graph's data and initiated a range of projects that will run from 2024:

- Belgium – RouteYou
All kinds of leisure activities can be planned and enjoyed with this app, including walks, cycle and motorbike tours, and cross-country horse rides. It can be used online, on smartphones and on GPS-enabled devices.
- Czech Republic – Smartguide
The start-up Smartguide offers an app that makes it easy to create digital travel guides. The GNTB and Smartguide joined forces on a pilot project that translates data about Leipzig in the Knowledge Graph into the Czech language, creates an audio file from it and then uses this in the app.
- Austria – Insiderei
This website, which features selected hotels and insider tips, integrates information from the Knowledge Graph for specific regions in Germany. Its map allows people to find tours and events and then look at them in detail.
- Denmark – Tryp
Tryp.com is an AI-based online travel portal that enables users to book all aspects of a trip to anywhere with a single click. As long as the accommodation options and transport links exist, Tryp.com makes it possible.

Hackathon: Knowledge Graph powers AI projects

The GNTB's Knowledge Graph provides the technical infrastructure for developing applications that use the power of AI. This opens up opportunities for new business models, start-ups, research projects and structural advances in the field of smart cities and digital destinations.

To make it easier to develop ideas and turn them into applications, the GNTB launched the Thin(gk)athon, for which the company Smart Systems Hub reimagined the innovative hackathon format. On 16 and 17 November, digital experts and attendees from destinations, start-ups and research organisations made use of the platform – and of the knowledgeable support from experts – to fine-tune ideas for innovative tourism projects and work with their partners to drive creative concepts forward.

The projects were expected to:

- Find solutions that could be delivered as quickly as possible
- Offer practical benefits
- Highlight the potential of the Knowledge Graph and the voice models
- Showcase opportunities for future implementation

At the end of the event, five teams presented their projects in an elevator pitch:

Touristic Data Feeder: This ready-to-use prototype of an AI-based assistant helps destinations to capture partner data for use in the Knowledge Graph.

AI-Assisted Data Management Solution: Together with the Touristic Data Feeder, this digital platform for AI-based capture and updating of partner data covers a complete digitalisation and updating scenario.

Promo-Partner: The team developed a tool that automatically creates social media posts. Using the data available in the Knowledge Graph, complemented by tailored information and integrated AI, the tool creates perfectly pitched posts for a wide range of social media channels.

Journey.ai: Various open interfaces were integrated into an existing tool for optimised travel planning, thus enhancing its usefulness.

Wowzer: This project demonstrates how data from the Knowledge Graph can pave the way for products that are specific to particular groups, making it easier to plan family activities, for example.

The Touristic Data Feeder and the AI-Assisted Data Management Solution will be presented during the Digital Destination Track at the ITB travel fair on 7 March 2024.

A pan-European approach: ODTA agrees key expansion of the schema.org standard for tourism

The Open Data Tourism Alliance (ODTA), a joint initiative of the German, Austrian and Swiss national tourism boards and around 20 partners at federal level, developed common technical standards for tourism information in 2023. The expansion of the schema.org standard enables the exchange of data between a wide range of systems and organisations.

The GNTB is responsible for the organisational leadership of the ODTA, while the Semantic Technology Institute Innsbruck, a group of experts at the University of Innsbruck, provides advice on the technological side of the process.

5 innovative projects with clear opportunities for future implementation



The teams presented their projects in an elevator pitch



Angelika Sauermost (Occitanie Tourism Agency), Marco Giraldo (TourCert gGmbH), Suzann Heinemann (GreenSign Institut GmbH), Thorsten Unseld (Digitize the Planet e.V.), Matthias Hickl (GNTB), Olaf Schlieper (GNTB), Professor Wolfgang Strasdas (Eberswalde University for Sustainable Development), Bettina Schütt (Dorint GmbH), Swantje Lehnert (Futouris e.V.), Dr Nadine Scharfenort (German Climate Fund for Tourism), Professor Walter Leal (Hamburg University of Applied Sciences Hamburg)

80

delegates explore key issues for the future

Second GNTB Sustainable Tourism Day: ideas for greater sustainability in inbound tourism

Strategic goals and practical approaches to more sustainable inbound tourism, and what skills might be required in the future, were just two of the key topics at the GNTB's second Sustainable Tourism Day. Around 80 experts, policy-makers, business decision-makers, stakeholders and partners in travel to Germany gathered for the event in Frankfurt on 26 September 2023. The keynote speech by Professor Walter Leal, Head of the Sustainable Development and Climate Change Management research centre at Hamburg University of Applied Sciences, explored the consequences of climate change for tourism and highlighted the urgency of taking concerted, rapid action.

Below is a summary of the key points from the presentations, lectures and panel discussions:

- Climate action is another area where Germany faces strong international competition.
- Consumers are more aware and better informed. Destinations need to ensure that their offerings match consumers' sustainability expectations.
- Certifications are useful and essential to ensuring a structured approach by stakeholders.
- Certification providers must be appropriately trained and qualified in order to boost the credibility of the schemes.

The GNTB supplies data for the German Climate Fund for Tourism

The German Climate Fund for Tourism (DKT) supports the German tourism industry in its efforts to deliver effective greenhouse gas reductions and document them in an industry-wide greenhouse gas inventory. In addition, a scientifically robust, transparent and standardised methodology for calculating the greenhouse gas emissions of travel to Germany is in development for the first time. The project was initiated by the Federal Association of the German Tourism Industry (BTW) and is funded by the Na-

tional Climate Initiative (NKI) of the Federal Ministry for Economic Affairs and Climate Action (BMWK).

Working closely with the DKT and Futouris, the GNTB is involved in the creation of a methodology for calculating emissions in the tourism industry. In this context, the GNTB supplies data on inbound tourism to Germany for the industry-wide greenhouse gas inventory. Furthermore, the partners showcased the DKT and the project's progress at GNTB networking events such as the Knowledge Days and the Sustainable Tourism Day.

Embracing sustainability as an organisation, and doing so transparently

Balanced score card introduced at GNTB events

The balanced score card used to appraise GNTB events was developed in 2022 and introduced across the organisation and its foreign representative offices in 2023. Seamless reporting during the monitoring process will allow the GNTB to analyse environmental impacts and identify potential for improvement.

The GNTB's environmental officer

In 2023, the position of environmental officer was created. The person occupying this role reports directly to the Executive Board and is supported by a team comprising the sustainability coordinators from across all areas of the organisation. The team develops specific, cross-departmental measures aimed at achieving environmental goals and improving the GNTB's environmental performance and footprint.

Green Globe recertification

The GNTB was certified as a Green Globe organisation for the tenth successive year in 2022/23, which led to it being awarded platinum member status, the highest accolade possible under the well-regarded scheme.

ECOPROFIT status confirmed

The GNTB's head office in Frankfurt has been participating in the regional ECOPROFIT initiative since 2014, and was once again certified in 2023.

EMAS

The EMAS Eco-Management and Audit Scheme, created by the European Commission, helps organisations to assess, report on and continuously improve their environmental performance. A premium tool, it also meets the requirements of the international standard for corporate environmental management systems defined by ISO 14001.

SUSTAINABLE CORPORATE GOVERNANCE: LINKING ALL ACTIVITIES TO SDGs AND IDENTIFYING POTENTIAL FOR OPTIMISATION.

The GNTB started to implement the location-specific EMAS environmental management system in Frankfurt in 2023. The resulting environmental protection measures are designed to reduce resource consumption and costs while increasing employee awareness of sustainable working methods, with the aim of linking sustainability and efficiency in business processes over the long term.

Progress report on sustainability

The GNTB published its first progress report on sustainability in early 2023, which examined all areas of the organisation against the criteria 'strategic targets', 'progress so far' and 'next steps', and linked each activity to the relevant sustainable development goals (SDGs).

The GNTB has thus laid the foundations for implementing the EU's Corporate Sustainability Reporting Directive (CSRD), which came into effect in 2023. The GNTB's second progress report on sustainability will pick up on the overarching regulatory framework and provide an example of best practice for the industry's many small and medium-sized businesses.

The GNTB presented strategies and examples of best practice at the eleventh Accessible Tourism Day

The GNTB organised the eleventh Accessible Tourism Day on 17 March 2023 as an online event. Dieter Janecek, Member of the German Parliament and Federal Government Coordinator for Tourism, and Jürgen Dusel, Federal Government Commissioner for Matters relating to Persons with Disabilities, provided the opening statements. Afterwards, speeches and presentations by, and discussions with, German and international experts explored topics such as the responsibility of architects, principals and operators to ensure accessibility, the role of people with disabilities as employees, and mobility on demand as a key element of the shift to greener transport.

550
accredited
online participants

Key points from the presentations, lectures and panel discussions:

- Despite a concerted effort to raise awareness, there is still a lack of understanding in many areas about accessibility
- People with accessibility needs are not sufficiently integrated into processes and at the planning stage

Travel for All

This Germany-wide certification system currently provides detailed accessibility information for more than 2,000 certified offerings along the entire tourism value chain. The content that has been available in the Travel for All database can be accessed in German and English in the 'barrier-free travel' section of the website www.germany.travel, for example.



The GNTB organised photo shoots to create new photographic content for accessible travel in Germany.

A look ahead to 2024

- Survey of Sinus-Meta-Milieus® in other countries (China, Japan and India): link to data on travel behaviour, and a broad, travel-related survey of the interest in sustainability beyond the general milieu indicator
- Analysis of regional demand to be added to the GNTB's Inbound Travel Trends Germany dashboard: optimised forecasting, using machine learning, of the arrival trends from key source markets over a period of three months
- Expansion of the GNTB's Sustainable Travel Trends to Germany dashboard: analysis of the length of stay and tourism density in Germany's key cities
- Open Data project: roundtable discussions with the research community aimed at making more of the opportunities present in the data infrastructure; linking of additional sources to the Knowledge Graph to expand the data it contains
- Delivering the EMAS certification
- Testing of the next generation of end devices for mixed-reality applications (Quest 3) and their implementation in the GNTB's VR apps

Travel for All was restructured at the organisational and commercial level in 2023, and has been the joint responsibility of the federal and regional governments since January 2024. Under this new structure, the GNTB will take care of technical service level agreements and manage the sharing of data via the Open Data project / Knowledge Graph and its website. The GNTB is developing a data model for this purpose.

Fact-finding tours provide authentic insights into accessible travel in Germany

The GNTB organised various fact-finding and influencer tours to raise the international community's awareness of the high standard of accessible services in Germany.

- During the 'Barrier-free tour – history meets future' trip around North Rhine-Westphalia, seven international journalists learned how people with a range of impairments can explore and experience tourism attractions.
- In cooperation with Atout France, the GNTB ran a campaign in which French and German influencers showcased the accessible tourism offerings their homeland has to offer. Rail operators Deutsche Bahn and SNCF were partners in the campaign.
- Further fact-finding tours on the topic of accessible travel were organised as part of the Germany Travel Mart and the Germany Incoming & Brand Summit event.



Accessible travel on the German Wine Route

Enabling the international travel industry and our partners in inbound tourism to Germany to network through a range of B2B formats is key to successfully positioning Destination Germany in the international market.



The 2023 ITB was an in-person event again and featured a new and expanded stand design for Destination Germany

Even more sharing of knowledge across the network

Online media and social networks have opened up a whole range of channels for communicating with end customers, making it even more important for the GNTB to collaborate closely with its members and its partners in the international travel industry. The GNTB continues to develop its formats for networking with partners in the German and international trade and uses its expertise to make inbound tourism to Germany more sustainable.

ITB 2023 – a successful post-pandemic, in-person event

Following the enforced move of trade fairs into the virtual realm during the pandemic, the GNTB, together with a number of different partners, was able to present Destination Germany in person again at the ITB 2023. An integrated presence featuring various regional and general tourism organisations and companies made the Germany stand – in its new location of Hub



Exhibitors in the GNTB section of the stand
 Usedom Tourism, German UNESCO World Heritage Sites Association, Romantic Road, German Tourism Association, RDA International Coach Tourism Federation, German Cyclists' Federation (ADFC), Barrier-free Destinations in Germany Association, Sixt SE, Europa-Park

Excellent feedback for the 2023 Germany Travel Mart™ (GTM) in Essen

At the GTM, held on 17 and 18 April 2023, around 200 German companies from the hotel, transport and leisure industries, inbound services, and regional tourism organisations, plus around 230 buyers from international and online travel companies, held around 5,300 meetings to negotiate deals for the coming year. About 100 journalists also took part in the event.

Key themes:

- Sustainability and climate action
- Digital transformation
- Combining city breaks with stays in rural regions
- Green transport options
- Extending the length of stays

94 %
 consider the GTM a
 very good platform
 for conducting business

27 – the central platform for sales and marketing, communication and personal contacts. Tried-and-tested event formats, such as the parliamentary evening and the parliamentary breakfast with members of the German Bundestag's Tourism Committee and representatives of the Federal Ministry for Economic Affairs and Climate Action, showed that the GNTB and the tourism industry retained their strong links with political decision-makers in 2023. Hundreds of B2B meetings provided a forum for buyers, service providers and experts to form or re-establish business contacts, find out about the latest trends and meet and compare notes.

Exhibitors in the regional tourism organisation section

North Rhine-Westphalia, Rhineland-Palatinate, Saarland, Thuringia, Saxony-Anhalt, Mecklenburg-Vorpommern, Baden-Württemberg, Saxony and Schleswig-Holstein



B2B workshop at the GTM in Essen



Sales meetings with representatives from the international travel trade at the GTM

The GNTB's 49th GTM was once again run as a green event. The close collaboration with the host, Essen Marketing Gesellschaft mbH (EMG), facilitated the implementation of a range of measures that made the GTM more sustainable.

Public transport was used for the majority of transfers during the event. The GTM tickets included free use of public transport throughout the Rhine-Ruhr region. Participants also received a Deutsche Bahn train ticket for the journey to and from the event. The catering used mainly seasonal and regional produce. Sustainability was also a top priority at the GTM's pre-convention tours, and in the programmes for trade visitors

and journalists during the event. Programme content focused on ideas for green, climate-friendly holidays, while press and trade tours for those with restricted mobility firmly established the theme of inclusivity as part of the GTM concept.

The GNTB also measured the carbon footprint of the entire event in order to develop further specific measures for reducing the emissions of future events. In addition, a comprehensive analysis of the existing sustainability measures for all stakeholders – from the organisers and partners to the suppliers and guests – will enable the GNTB to employ an even more ambitious approach to sustainability at upcoming GTMs.

The GNTB's Knowledge Days create momentum for the digital transformation of inbound tourism to Germany



A look to the future at the Knowledge Days

Given the growing challenges from climate change and various other crises faced by the tourism industry in the post-pandemic era, digital leadership and digital touchpoints along the entire customer journey will be key to boosting and expanding the position of Germany as a travel destination in an increasingly competitive market. Using the theme of 'Incoming tourism fast forward', the GNTB's Knowledge Days combined the expertise of leading specialists and the inside knowledge of the GNTB to support its partners in the Ger-

man travel industry on their road to the future. How will AI affect the tourism industry? How could it reduce workloads? How could it improve accessibility? The keynote speech 'AI outlook and roadmap' by Fabian Westerheide, CEO of Rise of AI and founding partner of Asgard Capital, raised these and other questions and provided answers.

Key findings and lessons from other presentations

- The key factors for sustainable air transport are avoidance through intermodality, reduction of greenhouse gas emissions through operational excellence, technology and sustainable aviation fuels, and offsetting through certified climate change mitigation projects.
- Mobile location data can be used for the anonymised analysis of international travellers arriving overland. This can provide insights into areas such as the socio-demographic structure of visitors to events, effects on the hotel market, and how busy tourism hotspots get at certain times.
- By using the GNTB's various data and visualisation dashboards, it is possible to combine climate change mitigation data and business data from non-public sources.
- Generative AI applications are already suitable for producing a variety of different types of text, creating background images using text prompts and adapting creative assets to various social media platforms.
- Anja, the AI-supported chatbot at www.germany.travel, is being further enhanced by linking it to the Knowledge Graph and by improving the AI language model.

WHEN IT COMES TO PROTECTING THE ENVIRONMENT, GERMANY IS AMONG THE TOP TEN COUNTRIES IN THE NATION BRANDS INDEX.

Around 90 participants accepted the GNTB's invitation to the Design Offices in Frankfurt. The event was also open to non-members for the first time.

GNTB's Germany Incoming & Brand Summit on the theme of 'Travel in the age of climate change and shifting values'

The positioning of Destination Germany as a sustainable brand in the international market was the core theme of the third Germany Incoming & Brand Summit, held on 8 June in the Hanseatic city of Lübeck, itself a certified sustainable destination. The event was organised by the GNTB in partnership with Lübeck und Travemünde Marketing GmbH. At the invitation of the GNTB, over 130 journalists and influencers from 33 countries attended presentations and a panel discussion to find out more about the excellent global reputation of the Destination Germany brand and the GNTB's integrated sustainability strategy.

Jason McGrath, Executive Vice President and Head of Corporate Reputation at the Anholt-Ipsos Nation Brands IndexSM (NBI), reported on the findings of his company's latest research into how Germany is perceived in the international market.



Jason McGrath, Anholt-Ipsos Nation Brands IndexSM, during his presentation

Petra Hedorfer, CEO of the GNTB, believes that striking a balance between the needs of the economy, the environment and society is key to the success of inbound tourism to Germany.

TOURISM THAT IGNORES THE ASPECTS OF SUSTAINABILITY WILL BE THE ARCHITECT OF ITS OWN DOWNFALL IN THE LONG RUN.

Panel discussion on future sustainable mobility in Germany

Alexander Tolweth, Lufthansa: Lufthansa has pledged to reduce emissions by 50 per cent by 2030 – through avoiding, reducing and offsetting. The key factors in achieving this goal are technological progress, optimised operations and sustainable aviation fuels. Max-Christian Lange, Deutsche Bahn: Our approach is based on intermodality concepts and seamless connectivity – from intercontinental flights through to rural connections – along the entire value chain, from the infrastructure to the reservation process.

Jason McGrath: An organisation’s sustainability strategy is an essential component of its reputation. Germany’s intermodal travel options are the envy of other countries.

Meanwhile, a range of different sessions and Lufthansa’s ‘SAF Experience Room’ introduced participating influencers to more sustainable tourism options being developed in Schleswig-Holstein and Mecklenburg-Vorpommern.

The Germany Incoming & Brand Summit’s programme of supporting events organised by the GNTB featured seven post-convention tours with a focus on sustainable tourism, including a special tour with accessible offerings in Lübeck, Travemünde, Hamburg and the Lüneburg Heath region.

Promising outlook for inbound tourism to Germany at the GNTB’s US Advisory Board workshop

88 representatives of German travel companies, destination marketing organisations, inbound tourism agencies and other tourism service providers took advantage of the workshop held as part of the annual US Advisory Board’s out-of-country meeting to learn about the latest market trends in direct discussions with top decision-makers from the US travel industry.

The US Advisory Board Meeting is a key platform for networking and sharing knowledge, and a firm fixture in the GNTB’s events calendar. This in-depth dialogue with decision-makers enables marketing activities to be precisely targeted at the US market.

Key findings

As a destination, Germany exceeds the expectations of US tourists and is well positioned in the competition among European destinations. At the same time, travel agencies and travel operators were already registering a promisingly high demand for trips to Germany in 2024. Important themes were art and culture, Christmas markets, heritage, UNESCO and river cruises. These were the key findings of the US Advisory Board’s panel discussion at the GNTB Industry Day on 19 September.



Networking during the US Advisory Board meeting



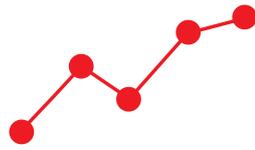
Mecklenburg-Vorpommern – workshop in Greifswald

27 %

growth

in tourist arrivals by air from
the USA in 2023 compared to 2022

Source: ForwardKeys.



Second International GNTB Travel Summit in Mecklenburg-Vorpommern

In the three decades since reunification, Germany's new federal states including Berlin have seen an increase in the number of overnight stays by international visitors by a factor of 6.2, to 21.1 million. The share of the new federal states in the total of inbound tourism to Germany doubled from around 10 per cent at the beginning of the 1990s to 23 per cent over the same period.

But the new federal states still have the potential to increase their share of overnight stays by foreign tourists. With the Saxony Travel Summit in 2022, the GNTB created an additional professional platform that enabled tourism partners in the federal states and the international travel trade to communicate, network, maintain contact and do business. The format was put out to tender and the Mecklenburg-Vorpommern Tourist Board won the right to host the second event, which was held from 24 to 28 September 2023 in the towns of Stralsund and Greifswald. At the heart of this Travel Summit was a workshop day in Greifswald.

The representatives of the transport sector also reported a bright outlook. In the first half of 2023, sales figures for Rail Europe were already 150 per cent above comparative figures for 2019, and Lufthansa announced new direct flights between the USA and Germany. The 2023 GTM was hosted by Bayern Tourismus Marketing GmbH and Congress- und Tourismus Zentrale Nürnberg, the tourist boards for Bavaria and Nuremberg. Bavaria accounts for the largest number of overnight stays by Americans visiting Germany, with Nuremberg's historical Christmas market and its monuments to Germany's more recent past making it a particularly popular destination.

As part of the programme, the international participants received information about local tourism offerings. These included the historical old quarter of Stralsund, which, together with the Hanseatic town of Wismar, had been designated as UNESCO World Heritage 20 years before. Also covered were modern tourism concepts that are being realised in the seaside resort of Prora on the island of Rügen and in Peenemünde on the island of Usedom, and the Baltic coast as a region for relaxing in nature. In the context of the art and culture in rural regions theme, there was a particular focus on the 250th anniversary of the birth of Caspar David Friedrich, which the GNTB will be marking with themed communications in 2024.

Chief Executive Officer Petra Hedorfer and other senior GNTB managers visit the regional tourism organisations in person last year. In small, in-depth group meetings, valuable insights were discussed from the perspective of the federal states and cooperation opportunities for future, internationally relevant tourism highlights were found. Examples of the members' best practice in digitalisation and sustainability, the GNTB's core strategic action areas, were also presented at the meetings.

GNTB Meets Members tour strengthens links with partners in the German travel industry

The GNTB launched a new format, the GNTB Meets Members tour, in 2023 to step up its close dialogue with stakeholders in the German travel industry. It saw



Extensive marketing activities with members and partners

The GNTB, in conjunction with its partners in the German travel industry, such as destinations, businesses and marketing associations, uses its international network and market-specific expertise to promote the wide variety and high quality of tourism that Germany offers. There is a special focus on the central strategic action areas of digitalisation and climate action.

160



GNTB workshops, webinars, roadshows and trade events

THE GNTB'S RAIL CAMPAIGNS FOR CLIMATE-FRIENDLY TRAVEL

Deutsche Bahn	Germany off the beaten track Sustainability campaign 'Simply Feel Good'	France, Italy and Spain Worldwide
Austrian Federal Railways (ÖBB)	Cross-media holiday destination campaign	Austria
Deutsche Bahn and Swiss Federal Railways (SBB)	Rheinalp cross-media campaign	Switzerland
Snälltåget AB and SJ AB	'Simply Feel Good' sustainability campaign	Sweden
Deutsche Bahn and SNCF	L'Allemagne en train! campaign	France

CITY BREAKS AND CULTURAL TOURISM

Magic Cities	Collaboration with travel agency network Travel Leaders	USA
	Collaboration with lifestyle platform Little Red Book	China
Historic Highlights of Germany	Influencer and press trips Webinars for Virtuoso travel advisors Collaboration with Smithsonian museums	USA
	Digital media campaign with Viajes National Geographic	Spain
UNESCO Welterbestätten e. V.	Influencer and digital media campaign	France
	Social media campaign with Pinterest	Austria and Switzerland

INITIATIVES SPANNING MULTIPLE FEDERAL STATES

Deutsches Küstenland	Online and social media campaigns	Poland and Sweden
	Initiative with B2C tour operator Sembo	Sweden
Regional tourism organisations of Brandenburg, Saxony, Saxony-Anhalt and Thuringia	Tourism offerings in regions near the border	Poland
Romantic Road	Cross-media campaign with Tu Gran Viaje	Spain
	Collaboration with travel portal Latitudeslife	Italy
German Fairytale Route	B2C media content	Switzerland
Moselle region collaboration	Multimedia campaign incl. online advertorials	Belgium, Switzerland, Austria, Netherlands

A look ahead to 2024

- ITB 2024: Hub 27 will be hall of German-speaking countries for the first time
- 50th GTM: The anniversary event from 21-23 April 2024 to be hosted by Chemnitz
- Integration of transport data and sharing options in the GNTB's Knowledge Graph
- Continuation of innovative networking format 'GNTB Meets Members'



The GNTB's global marketing campaigns tell stories that keep the Destination Germany brand fresh in the minds of regular visitors while attracting new ones at the same time. Specific marketing themes promote events and anniversaries with international appeal.

51 UNESCO WORLD HERITAGE SITES
Historic.Modern.Germany.

51 UNESCO World Heritage Sites Historic.Modern.Germany.

Of the 140 million outbound cultural trips made by Europeans in 2022, 16.4 million were to Germany. That makes Germany the no. 1 cultural travel destination for Europeans, with a market share of 12 per cent. The GNTB's campaigns combine the excellent image of Germany's rich cultural heritage with the power of travel to unite people and the strategic objective of making tourism more sustainable.

The UNESCO World Heritage sites, of which there were 51 in 2022, are a particular draw for tourists. They are attractions of the highest quality and exemplify how to interpret cultural heritage sustainably and in a contemporary setting, successfully bridging humankind's past and its future.

Campaign focus

Following the UNESCO campaign in 2014, this was the second time that the GNTB used the enormous appeal of this universal heritage to boost Germany's global standing as a destination for sustainable cultural and nature-based travel. The key aim was to inspire travellers to enjoy memorable, authentic experiences in the city and culture segment, to show how city breaks can be combined with excursions to the countryside and to extend visitors' length of stay. The main target group were city break travellers who are interested in nature and culture, and who are looking for responsible and sustainable travel options that allow them to discover local places and people. The focus was on authentic, sustainable trips to castles and palaces combined with experiences in the great outdoors.

Implementing the campaign

As a central element of the campaign, the GNTB developed eight themed routes that combine sustainable travel to World Heritage sites with authentic experiences and that can be easily managed by public transport. Each route follows an overall theme that addresses travellers' specific interests. The suggested UNESCO routes have been designed to include seven to ten overnight stays to provide an incentive for longer stays. By integrating other points of interest along the routes that match the themes it becomes possible to raise awareness of lesser-known places and regions among potential travellers.

- Campaign-specific website that serves as a hub for inspiration and information
- Videos shot from a first-person perspective (aerial sequences filmed with drones)
- Video with cut-downs, including links to routes

- Cross-media distribution mix for end customers in 18 markets
- Distribution via Facebook, Instagram, YouTube and Pinterest
- Recommendation ads and search engine marketing
- B2B communication through theme-related newsletters, workshops and roadshows for key players from the international travel industry

A look ahead to 2024

- Continuation of the campaign – now with 52 UNESCO World Heritage sites (see also page 75)

UNESCO campaign

B2C communication

525
million impressions

Distribution on social media in 18 markets via Facebook, Instagram, YouTube and Pinterest

183
million impressions

through programmatic marketing

70
thousand contacts

in B2B social media channels

187
thousand email contacts

6
billion contacts

through press and PR work

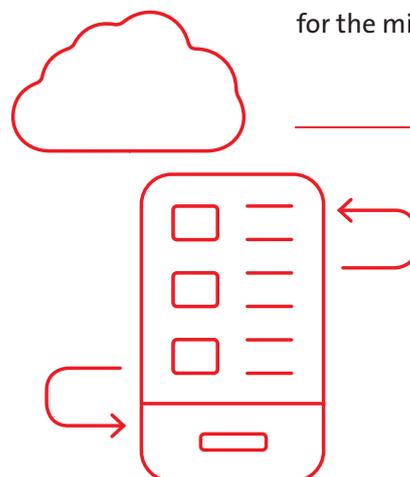
1.3
million views

for the microsite

B2B communications

156
PR activities in the markets

including press conferences, press briefings, press releases and press tours (individual and group)





Embrace German Nature – Discovering areas of outstanding natural beauty in Germany

Sustainable travel and nature-oriented holidays are a growing trend as the world recovers from the coronavirus pandemic. According to surveys carried out by IPK International, 26 per cent of travellers globally were planning a nature-based holiday in 2022. The figure was even higher, at 30 per cent, for holidaymakers planning to visit Germany. This puts Germany in second place in the IPK International ranking of destinations for Europeans travelling worldwide. Furthermore, Inspektour's Destination Brand 21 survey showed that important source markets for inbound tourism to Germany view the country as an excellent destination for rural getaways and sustainable holidays.

The GNTB picked up on this trend among potential visitors to Germany and created the global 'Embrace German Nature' campaign in 2022, which ran again in 2023. The campaign focused the attention of prospective travellers on Germany's natural landscapes and on sustainable holiday experiences in rural regions, while also boosting Germany's position as a sustainable travel destination in the international market.

Campaign focus

'Embrace German Nature' showcases distinctive landscapes with the aim of inspiring nature-loving, leisure-oriented people to visit Germany. The idea was to inspire people to discover the country's stunning landscapes and explore some of its lesser-known regions as part of an authentic and individual experience. 'Embrace German Nature' continued the GNTB's line of marketing campaigns that put a repeated focus on 'nature and recreation' and 'sustainability' as key elements of its core brand. The campaign aimed to promote holidays in rural regions, longer stays and greater sustainability.

Implementing the campaign

Creative content forms the central element of the campaign, and is channelled on a microsite to provide a hub for inspiration. The site also hosts a campaign video. The GNTB used a new digital tool, 8D audio, for the first time in its videos, which feature sounds from

Embrace German Nature campaign

B2C communication

96
million impressions

Distribution on social media in 18 markets via Facebook, Instagram, YouTube, Pinterest & Spotify

127
million impressions

through programmatic marketing

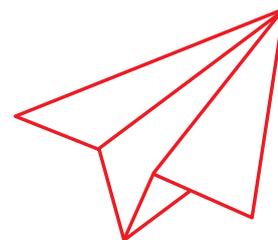
865
thousand views

for the microsite

162
thousand
email contacts

118
million contacts

through press and PR work



B2B communications

144
PR activities in the markets

including press conferences, press briefings, press releases and press tours (individual and group)

2
thousand impressions

in B2B social media channels



nature – from forests, meadows and mountains to rivers, lakes and the sea. The microsite links to in-depth content on www.germany.travel that presents natural landscapes and tourism offerings such as walks, cycle trails and spa resorts.

- Cross-media distribution mix for end customers
- Distribution via Facebook, Instagram, YouTube and Pinterest
- Recommendation ads and search engine marketing
- B2B communication through theme-related newsletters, workshops and roadshows for key players from the international travel industry.



Simply Feel Good in Germany: GNTB relaunches its global lead campaign for sustainability

Among the key accounts in the international travel trade surveyed for the GNTB Industry Expert Panel, awareness of Germany as a sustainable travel destination rose from 67 per cent in the first quarter of 2022 to 77 per cent in the first quarter of 2023, with 60 per cent marketing Germany specifically as a sustainable destination. Around 71 per cent of respondents expect sustainability-oriented travel spending to rise even more sharply over the next three years.

Campaign focus

Since 2021, the GNTB's award-winning 'Simply Feel Good' campaign has been promoting the wide range of certified sustainable offerings to the international markets. The campaign relaunch in 2023 showed how a holiday to Germany can combine sustainability, the finer things in life and all manner of experiences and discoveries. The travel ideas selected also reflected the growing number of tourism regions, hotels, operators and transport companies that are focusing on sustainability. The strategy and delivery of the campaign directly support the United Nations' sustainable development goals (SDGs) and underpin the GNTB's objective of making inbound tourism to Germany more sustainable.



300
thousand

email contacts

64
million impressions

through programmatic marketing

Implementing the campaign

- Redesigned landing page at www.germany.travel
- Four clusters: 'Discover', 'Enjoy', 'Stay overnight' and 'On tour'
- Almost 140 sustainable travel ideas selected from submissions across Germany
- Maps of Germany with links to other sustainable travel ideas
- Links to the relevant web pages of the 16 federal states, and to accommodation certified by at least one of the 17 recognised sustainability schemes
- Target groups matched to the Sinus-Meta-Milieus® that represent a particularly sustainable way of life

Season's Greetings from Germany



Christmas

Destination Germany is known throughout the world for its Christmas customs and traditions. Consequently, Christmas campaigns are a firm fixture in the GNTB's theme-based marketing. By showcasing Christmas traditions and winter activities, they inspire visits to Germany outside the peak season in summer. This supports the marketing of accommodation providers, restaurants and cafés, and retailers.

Campaign focus

Christmas markets, Christmas traditions and winter fun were the central themes of the 'Season's Greetings from Germany 2023' campaign. Spotify playlists featuring selected classic and modern Christmas songs gave potential visitors a taste of seasonal joy, while traditional recipes for lebkuchen, baked apples, punch and stollen served to whet the appetite for uniquely German yuletide treats. In the podcast, travel experts shared insider tips for the festive season.

370
thousand views

for the microsite

45
million impressions

through programmatic marketing

Implementing the campaign

- Media mix that included social media, programmatic advertising, audio streaming, email marketing and search engines in the international markets
- Microsite as a central information and inspiration hub on which each federal state was able to feature selected (and sustainable) Christmas travel offerings



In its multichannel communications, the GNTB continually addresses all target groups relevant to inbound tourism to Germany, from stakeholders, partners in tourism to Germany and the international travel industry to opinion formers, the media and the trade.



Wide-ranging B2B communications

The GNTB's corporate communications in 2023 focused on sustainability and digital transformation, how the market segments are developing in the post-pandemic era, and how current global trends are impacting on inbound tourism to Germany. The focus of its global PR work was on three campaigns: '51 UNESCO World Heritage sites', 'Embrace German Nature' and 'Simply Feel Good'.

The GNTB deployed the full range of press and PR tools, which includes everything from B2B social media, blog posts, editorials and inhouse publications to fact-finding tours and events, both trade and inhouse.

A look back on 2023

Successful press and PR work around the world

	No.	Total reach
PR events in the markets	42	0.6 billion
Press briefings	670	3.4 billion
Press conferences	34	1.5 billion
Press newsletters	190	75,000
Press releases	300	More than 5.8 billion

Digital channels keep business partners informed

The GNTB shared up-to-the-minute business content about B2B activities, market research data and the latest trends on its B2B social media channels. It also offered live feeds from B2B events such as the Knowledge Days, the Sustainable Tourism Day and the Germany Incoming & Brand Summit. The CEO of the GNTB shared insights and analysis around relevant trends in inbound tourism in her blog, 'From the Desk of Petra Hedorfer'.

780 posts
on LinkedIn, X (Twitter)
and Facebook

Live communication boosts dialogue with opinion formers

Sustainability takes centre stage at the GNTB's Germany Incoming & Brand Summit in Lübeck

The strength of the Destination Germany brand in the international markets and, in particular, the positioning as a sustainable destination were the core themes of the reports by the 130 or so media representatives, including 88 journalists and 43 influencers from 33 countries, who attended the third Germany Incoming & Brand Summit on 8 June in Lübeck (see page 35). Their more than 100 articles and posts had a total reach of more than 1.3 billion.

Parliamentary breakfast at the ITB

To maintain its strong links with political decision-makers, the GNTB held discussions over breakfast with members of the German Bundestag's Tourism Committee and representatives of the Federal Ministry for Economic Affairs and Climate Action (BMWK) at the ITB. It was the first time since the pandemic that this event has taken place.

Excellent feedback for the Germany Travel Mart™ (GTM) from the media

The GNTB presented the latest insights into Destination Germany during its international press conference at the GTM in Essen. During the press trips, the media representatives learnt, among other things, how the

193 articles
98 media representatives –
combined reach of
1.1 billion online and
14.2 million in print

former coal and steel region of the Ruhr has transformed itself into a modern, sustainable and culturally diverse region with a service economy.

Fact-finding tours for the media and trade offer authentic impressions of Destination Germany

Besides up-to-date information, the GNTB's fact-finding tours give representatives of the press and trade the chance to experience Destination Germany authentically and in person.

Group tours

- Five GTM pre-convention tours for trade partners as part of the GTM
- 28 press trips with a total of 284 participants from 30 countries, including
 - 16 themed press highlight tours
 - Five pre-convention tours ahead of the GTM
 - Seven post-convention tours accompanying the Germany Incoming & Brand Summit event

Barrier-free travel

To truly showcase the inclusivity of Germany as a travel destination in our reporting, the GNTB made sure three of the group press tours for 25 participants were accessible to as many people as possible.

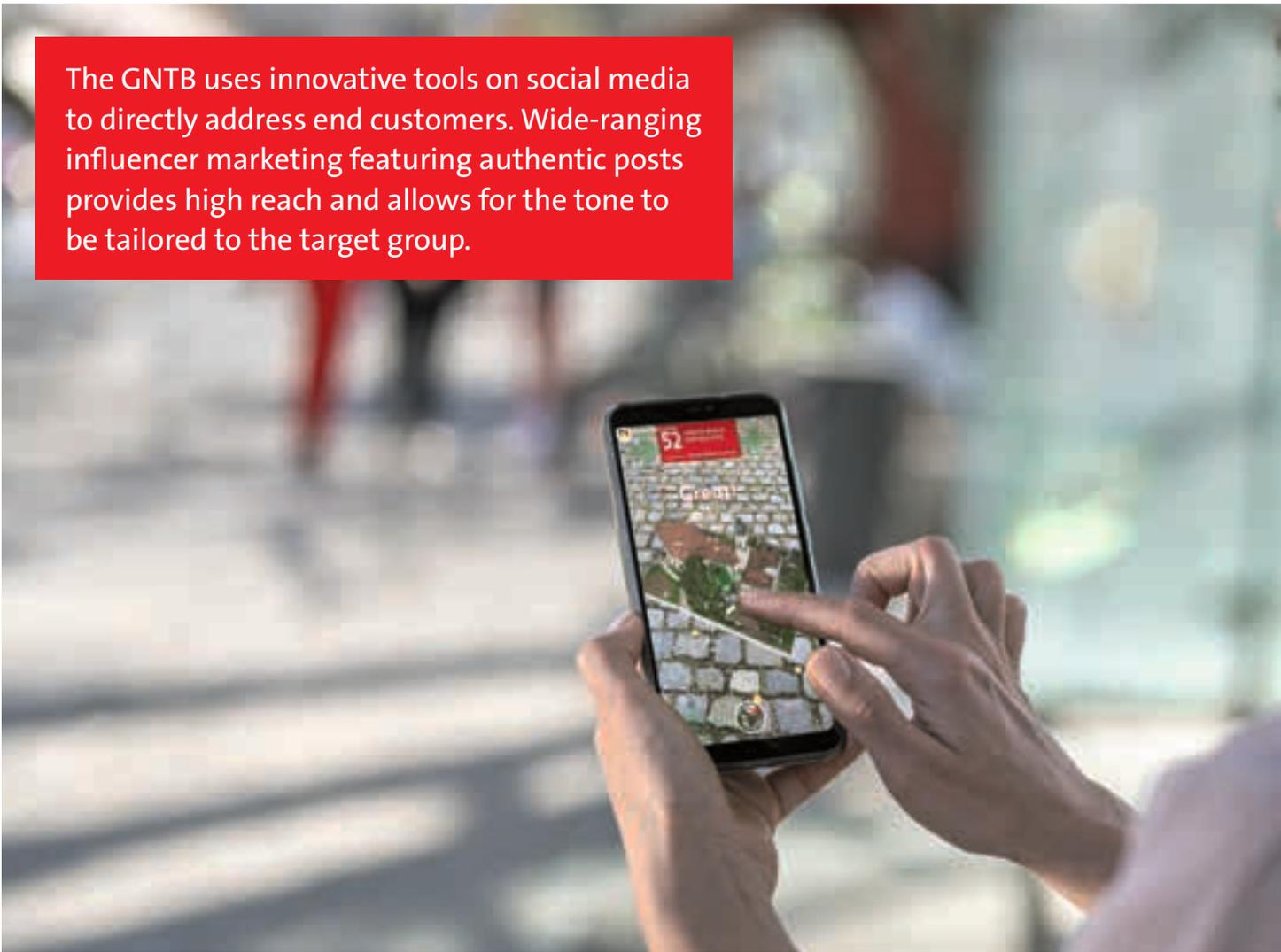
Individual tours

The GNTB ran 238 individual press tours in 2023 to support tailored reporting on market-specific topics.

131 million impressions
Reach of published material



The GNTB uses innovative tools on social media to directly address end customers. Wide-ranging influencer marketing featuring authentic posts provides high reach and allows for the tone to be tailored to the target group.



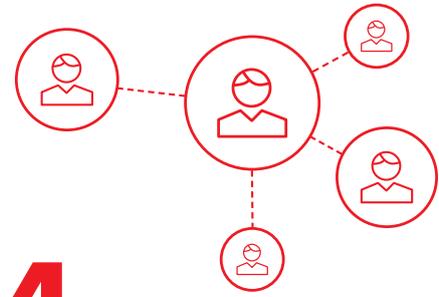
Innovative formats for reaching the market directly

Optimizing the way target groups are addressed by taking Sinus milieus into account

In 2023, the aspect 'defining relevant target groups by using Sinus milieus' (see page 22) was also applied to an analysis of the GNTB's social media activities. Overall, the analysis confirms that the GNTB is taking the right approach to selecting social media channels and deciding what to post on them.

- The GNTB's social media channels reach 75 per cent of all online users.

- Meta and YouTube are still the networks with the highest reach among the target group of over-25s.
- There are no significant differences in the way that each individual milieu group uses social media channels.
- TikTok is becoming more relevant and is already ranked fourth among social media platforms worldwide.



9.4

million impressions

Promotion via
Facebook in 16 countries

UNESCO campaign messenger

The UNESCO messenger on Facebook uses an interactive, game-based setting to present surprising and fascinating facts about Germany's World Heritage sites. It puts people's knowledge of German UNESCO World Heritage sites to the test by getting them to answer multiple-choice questions. If they answer eight questions correctly, they are awarded 'expert' status and can share their success with friends.

Influencer tours

In 2023, the GNTB organised 107 tours where influencers were able to share authentic, live experiences in Destination Germany directly with their followers, achieving a reach of 150 million among potential travellers to Germany.

#51UNESCOWorldHeritageSites influencer campaign along the eight UNESCO routes

- 14 influencers from eleven countries
- Reach of 24.7 million
- 25 million impressions
- Engagement rate of 3.37 per cent

Germany Incoming & Brand Summit in Lübeck

- 39 influencers from 25 markets travelled across Germany with a focus on sustainability
- Engagement rate of 4 per cent
- 27.4 million impressions

Gamification with social media tools complements UNESCO campaign

UNESCO AR filter project

The GNTB created an augmented reality (AR) filter for Instagram and for Facebook that allows it to target potential visitors from abroad in a fun and entertaining way and inspire them to visit Germany. The project was conceived as a continuation and expansion of the UNESCO campaign. The filter uses AR to turn Kassel's Wilhelmshöhe Park, Bamberg's New Palace and Belvedere Palace in Weimar into puzzles and so take the user on an interactive journey to Germany's UNESCO World Heritage sites.

69

million impressions

Social media communications
on Facebook and Instagram
in 16 markets



The GNTB employs a range of market-specific activities to create a close link between customer demand in the markets, the distribution network of the international travel industry and the partners in the German tourism sector.

Stay longer
germany.travel/inspiring

International markets

In 2023, the post-pandemic recovery continued to be driven by the European source markets. A 19 per cent increase in overnight stays from Europe year on year by the end of the third quarter of 2023 reflected the existing level of pent-up demand. Growth in the overseas markets was even more striking at 39 per cent. However, those figures were starting from a significantly smaller base.

In designing and delivering its marketing activities, the GNTB made use of the increasingly detailed market-specific information generated by its extensive business intelligence work. This includes gathering data based on Sinus-Meta-Milieus® as well as comprehensive information on travel behaviour and the latest economic developments in the source markets. The GNTB thus ensures the efficient use of the available budget.

Stay longer: experiencing Destination Germany sustainably

Extending the length of visitors' stay is a key element of the GNTB's sustainability strategy, which it promotes with the 'Stay a little bit longer' campaign that addresses economic, environmental and social considerations all at the same time.

6.8 nights

January – August 2023:
length of stay in Germany
by European visitors.
For comparison: 6.0 nights in 2019

- Spreads the carbon emissions of the journey across more days.
- Special offers for travelling outside the main season reduce pressure on tourism hotspots and provide a greater range of experiences for visitors.
- A more even capacity utilisation of hotels and restaurants across the year ensures stability for employees, resulting in improved motivation and quality of service.
- A longer stay also means more value created.



INBOUND TRAVEL FROM NORTH-WEST EUROPE

The Netherlands, traditionally the largest market for Destination Germany, almost reached the record levels achieved in 2019. The United Kingdom also showed above-average rates of recovery compared to 2022. For 2024, Tourism Economics is forecasting that the region will see further significant recovery, with the comparatively low price level in Germany remaining a contributing factor.



NETHERLANDS

TV and online campaign '51 UNESCO World Heritage Sites. Historic. Modern.Germany'. To position Germany as a place where you can visit lots of UNESCO World Heritage sites, and as an authentic and sustainable premium destination, GNTB Amsterdam launched a TV campaign on STER and Ad Alliance programmes aimed at specific target groups. In addition to its own UNESCO clip, the GNTB's local office incorporated sequences from its partners Thuringia, Saxony-Anhalt and Bremen in another TV ad. To increase the reach and strengthen brand awareness, it also put these ads on YouTube.

Over **19**
million contacts



UNITED KINGDOM

3D Caspar David Friedrich animation at Piccadilly Circus. To mark the 250th anniversary of the birth of Caspar David Friedrich, the GNTB is promoting Germany as a destination for cultural travel, while at the same time supporting tourism in rural regions. GNTB London launched the anniversary campaign with a DOOH advert at Piccadilly Circus, Europe's largest digital 3D advertising space. For two weeks, videos were shown on a ten-minute loop. One highlight of the campaign was a 3D video, shown on an hourly basis, that featured the painting 'Wanderer above the Sea of Fog', among other things.

11.6 million views

BELGIUM

Cross-media partner campaign with Go Forest. As part of the 'Stay a little bit longer' campaign, GNTB Brussels set up a travel hub at the train stations in Antwerp and Liège where passers-by could find information about sustainable and extended trips to Germany, as well as being able to download a digital travel guide. For each downloaded travel guide, a tree was planted in Germany in the autumn of 2023

180 thousand views on YouTube



THE GNTB'S ACTIVITIES

GNTB ROADSHOWS AT A GLANCE

Market		Event	Format
United Kingdom	1 June	GNTB speed networking	In person
Netherlands	21 November	ReisMarkt '2024 in focus', Amsterdam	In person
Belgium	21 November	Germany workshop, Brussels	In person

INBOUND TRAVEL FROM NORTH-EAST EUROPE

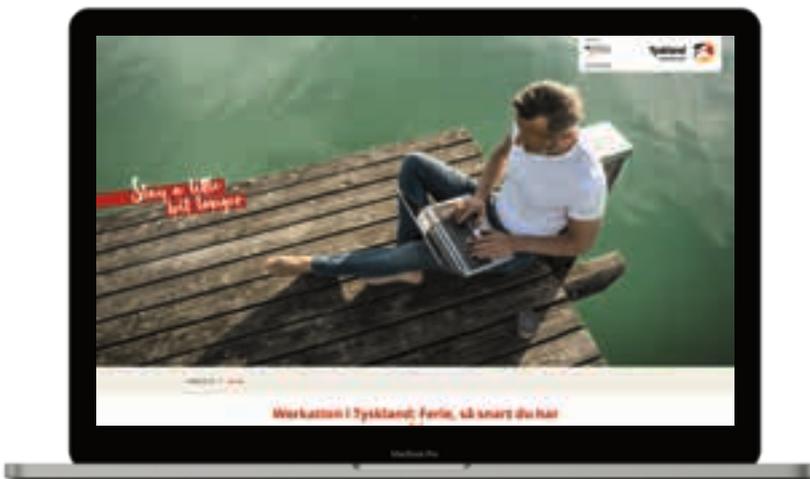
In 2023, overnight stays by visitors from Poland were more than 20 per cent above the record figures achieved in 2019. Tourism Economics' optimistic scenario for 2024 predicts that overnight stays from the Scandinavian markets will reach figures above the levels of 2019. However, growth could be constrained by inflation, both in Germany and in the source markets.



DENMARK

A **'workation' in Germany**. The digital transformation opens up new opportunities to combine the worlds of work and travel, which has turned concepts like 'workation' and 'bleisure' into established global tourism trends. Destinations that are prepared to take advantage of this trend increase their potential for attracting extended stays. With this in mind, GNTB Denmark produced eight videos on specific themes and created a workation microsite that successfully inspired Danish end customers. The promotions were run on LinkedIn, Meta, Pinterest and YouTube.

48 thousand clicks
on workation
in Germany microsite





1.68

NORWAY / SWEDEN

Influencer campaign 'Around Germany in 80kg of CO₂'. The objective of this campaign was to combine an extended stay with the smallest possible carbon footprint. Four influencer couples travelled to places including Bremen, Berlin, Saxony and Lake Müritz as sustainably as possible and published their travel experiences on social media and a campaign microsite.

million impressions

Reach of display advertisement



GNTB ROADSHOWS AT A GLANCE

Market	Event	Format
Denmark, Sweden, Norway and Finland	24–26 October	North Europe workshop, Gothenburg
Poland	14–15 November	2023 Roadshow Poland, Wrocław and Poznań

POLAND

Innovative targeting with smart TV campaign. In Poland, the GNTB used addressable TV to ensure 30-second adverts from the 'Stay a little bit longer' campaign were played in specific types of household. The adverts promoted the use of local public transport and extended stays in Destination Germany.

17 million contacts

INBOUND TRAVEL FROM SOUTH-EAST EUROPE

Austria, one of the top ten markets for Germany's inbound tourism, almost reached pre-pandemic levels, and some high-potential markets, such as Bulgaria, Croatia, the Czech Republic, Romania, Slovakia and Slovenia are already exceeding their 2019 figures. Strong economic growth in the Balkans promises a further upswing in 2024.

SERBIA & ROMANIA

Green German Days in the Balkans. A three-pronged campaign by the GNTB to promote Germany as a sustainable travel destination in the emerging markets of South East Europe consisted of cinema ads in five cities with pop-up events in the cinema foyers, supported by OOH billboard advertising and a major B2C event in Bucharest. These were accompanied by the 'Leave green footsteps on your journey' videos.

12 million reached by OOH and cinema campaign

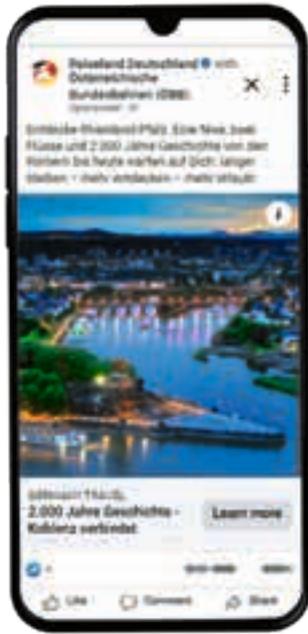


CZECH REPUBLIC



Enhanced cinema experience promoting Destination Germany. In the Czech Republic, the GNTB opted to provide experiences and inspiration at several levels as part of the 'Stay a little bit longer' campaign. In addition to running traditional cinema ads, the GNTB also promoted sustainable travel and longer stays in Germany using pop-up events in cinema foyers. These included the 'Nature Experience in Germany' VR app, a HyperCube with solar panel and battery storage, and a messenger bot.

800 thousand people saw the HyperCube



Online campaign with

31.4
million
impressions

AUSTRIA

Train travel to Germany – convenient and affordable. It's the ideal way to visit your neighbouring country in comfort and with a low impact on the climate. The successful marketing collaboration between GNTB Vienna, Austrian Federal Railways (ÖBB) and Deutsche Bahn continued with a new campaign in 2023. The marketing partners used their online presence, a dedicated microsite, social media, and OOH advertising to promote fast and affordable links between Austria and Germany across various media.

Best practice with Knowledge Graph data.

Data from the Knowledge Graph project is now being used by the international travel trade, and this is one of the ways that its roll-out can be considered a success for inbound tourism to Germany. For example, GNTB Vienna implemented an open data storytelling scheme in partnership with the travel portal insiderei.com. Customers using the website to search for hotels, or to find out about the favourite spots and insider tips of 'Insiderei locals', received individual recommendations for cycle tours, hiking trails and family activities, based on data from the Knowledge Graph.



GNTB ROADSHOWS AT A GLANCE

Market		Event	Format
Balkans	10–12 September	Balkans Roadshow, Belgrade and Bucharest	In person
Balkans	13–15 September	Romania trade workshop, Timișoara, Sibiu, Cluj-Napoca	In person
Austria	19–20 September	Austria Roadshow, Vienna, Linz	In person

INBOUND TOURISM FROM SOUTH-WEST EUROPE

All countries within the South West Europe Regional Management area significantly exceeded the previous year's figures, though they did not reach the record levels of 2019. In 2024, Tourism Economics expects inbound tourism from south-west Europe to reach or even surpass pre-pandemic levels. Germany's hosting of the UEFA EURO 2024 football tournament offers additional tourism potential.



4.9
million
impressions via
display ads

SWITZERLAND, ITALY, SPAIN AND FRANCE

One campaign across three online platforms. The Regional Management organised a macro-regional campaign based on the 'Stay a little bit longer' theme with three major online travel agencies – Opodo, eDreams and GoVoyages. This campaign consisted of a microsite, native ads with banner advertising, social media activities, newsletters and discount codes on the platforms' own websites.





Influencers in front of Stralsund town hall

33

million

impressions and
and 4.9 million
video views on the
influencers' channels

SPAIN, FRANCE AND ITALY

Germany off the beaten track. The sixth incarnation of this macro-regional influencer campaign, run in collaboration with Deutsche Bahn, focused on the strategic promotion of rural regions and sustainable travel behaviour. The participating influencers from Spain, France and Italy travelled from Hamburg to Greifswald on a route that also included Stralsund and the islands of Hiddensee and Rügen.

GNTB ROADSHOWS AT A GLANCE

Market		Event	Format
Switzerland	23 May	Germany workshop, Zurich	In person
Italy	27–28 September	Germany workshop, Milan and Rome	In person
Spain	16–18 October	Meet Germany workshop	In person
France	24–26 October	Germany workshop, Paris	In person/ virtual

INBOUND TOURISM FROM THE AMERICAS / ISRAEL

The close transatlantic links between the USA and Germany are reflected in the fact that the US market ranks consistently among the top source markets for inbound tourism to Germany. In 2023, the USA confirmed its position as Germany's biggest overseas market by far by bringing its recovery up to more than 90 per cent of the pre-pandemic level. The future prospects for demand from the Israeli travel industry will depend to a large extent on the war in the Middle East.



GNTB PR event with visitBerlin on 20 June 2023 in Tel Aviv



USA

Connected TV campaign showcases local culture. The GNTB ran a smart TV campaign focusing on the themes of regionality and cultural heritage in order to boost brand awareness for Germany as a varied and sustainable destination. The campaign consisted of 32 different 15-second and 30-second video ads that were shown on three leading networks, the Travel Channel, Samsung TV plus and Viacom, and were targeted at regions from which direct flights to Germany are available.

98
per cent
is an exceptional
view-through rate



4.5 million
Reach of media publications

ISRAEL

Sustainability and UNESCO World Heritage the focus of PR event with visitBerlin. A joint PR event run by the GNTB and visitBerlin in Israel focused on the global ‘Simply Feel Good’ and ‘51 UNESCO World Heritage sites’ campaigns. The opportunity to have one-on-one meetings with GNTB experts proved very popular with media representatives.

CANADA

B2B campaign with Lufthansa. In Canada, a B2B campaign run by the GNTB in collaboration with Lufthansa aimed to bolster Germany’s profile in the trade as a destination for sustainable travel. The three-part series of advertorials in trade media, newsletters, social media and e-blasts focused on sustainable travel offers in Germany and on Lufthansa’s sustainability goals, which include the use of sustainable aviation fuels and efforts to reduce waste and plastic en route to carbon-neutral aviation.



THE GNTB'S ACTIVITIES

568 thousand impressions
BAXTER AND TRAVELWEEK

GNTB ROADSHOWS AT A GLANCE

Market	Event	Format
Canada	2 October Travel advisors reception, Toronto	In person
USA	3–5 October Germany marketplace and travel advisors’ receptions, Boston and Atlanta	In person

INBOUND TOURISM FROM ASIA

Year-on-year growth rates were high, but are not yet sufficient to offset the decline during the pandemic, in particular from China and Japan. However, according to the ETC's Long Haul Travel Barometer, there is a marked increase in travel intentions. India, South Korea and the Arab Gulf States showed a particularly strong recovery. The resumption of overseas group tours from China sends encouraging signals.

ARAB GULF STATES

Precision marketing with Amadeus subsidiary Travel Audience. The GNTB launched a data-driven programmatic marketing campaign to showcase Destination Germany within the Arab Gulf States, taking advantage of the market's strong desire to travel. In collaboration with the Travel Audience marketing agency, the GNTB was able to accurately segment travellers according to their planned length of stay (short, medium or longer trip), based on data provided by the agency's parent company, Amadeus. The main focus was on travellers who were interested in longer stays.

50 thousand impressions

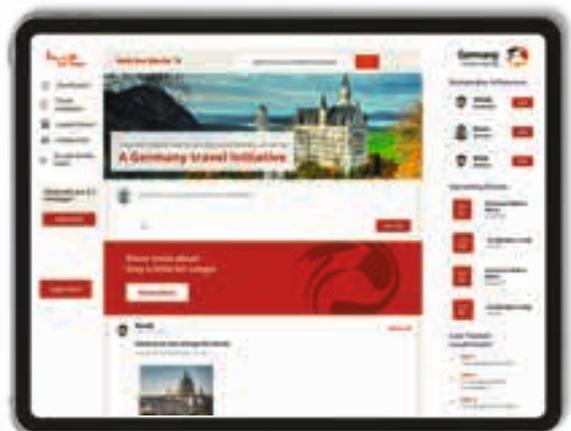
JAPAN

Simply Feel Good in the Black Forest. GNTB Japan targeted the strong interest of Japanese people in health and culture with a multistage campaign featuring stories about Baden-Baden's authentic spa traditions and tips on sustainable travel. In a collaboration with the travel portal Asahi Travel and supported by Lufthansa, it organised a press trip and ran an advertorial and a social media campaign.

INDIA

Interactive slow travel dashboard. GNTB India has developed a gamified travel experience platform to promote longer stays in Destination Germany. The campaign aims to provide Indian leisure travellers with information about sustainable holidays in Germany using a dashboard. This shows urban and natural landscapes, environmentally friendly transport alternatives and eco-certified accommodation options. On the dashboard, users can collect 'Karma points' that are displayed in a leaderboard with rankings.

36 thousand page views



GNTB ROADSHOWS AT A GLANCE

Market		Event	Format
China	22 March 24 March	China Spring Roadshow, Chengdu China Spring Roadshow, Shanghai	In person
Arab Gulf States	28–30 April	Discover Europe travel summit, Dubai	In person
China	17 May	China Spring Roadshow, Guangzhou	In person
China	7 July	China Summer Roadshow, Chengdu	In person
Arab Gulf States	29 October – 2 November	Destination Germany – Gulf States Roadshow, Jeddah, Riyadh, Kuwait, Doha	In person
Japan	6–10 November	German Travel Week, Tokyo, Seoul, Osaka	In person
China	13–16 November	China Roadshow, Beijing, Guangzhou, Chengdu, Shanghai	In person

CHINA

Focus on city tourism: campaign with Magic Cities. GNTB China, in partnership with Magic Cities, developed a multi-level campaign intended to remind potential travellers about visiting Germany in the post-pandemic era, and to increase awareness of Germany and boost its image.

On the trade side, the campaign featured 90-minute online B2B training sessions highlighting sustainable experiences in the Magic Cities. The content of these webinars was then made available as a digital travel guide on social media such as Weibo and WeChat. For end customers, the GNTB used four video routes on the themes of Arts & Culture, Fashion & Lifestyle, Family & Leisure and History & Culture to promote Destination Germany on the leading Chinese lifestyle platform Little Red Book.



10
million
impressions for
content campaign

Strong brand presence around the world

International awards for campaigns

Belgium

Award for 'Stay a little bit longer' with partner Go Forest as one of the top ten out-of-home campaigns in Belgium

Austria

Intermedia Globe Silver Award for 'Wake up in Destination Germany' in the category 'Web Videos/Sports & Activities'

Denmark

Golden City Gate Award for 'Ein smuttur til Bremen' in the category 'International Campaign'

Portugal

ART&TUR Award in Portugal: UNESCO hero video submitted, runner-up in the category 'Culture & Heritage'

Arab Gulf States

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

United Kingdom

Winner in the category 'Most Desirable Country for Sustainability' at the Wanderlust Travel Media Reader Awards

China

- Winner in the category 'Best City Walk Destination' at the World Leisure Awards
- Germany named the destination offering the biggest potential by leading OTC Ly.com
- Winner of the Destination Digital Promotion Award at the 2023 National Tourism Quality Awards
- Winner in the category 'Destination Marketing Team TOP10' at the National Tourism Quality Awards
- Gold Award as a top destination from National Geographic Traveler

USA

Winner of the Condé Nast Traveler Readers' Choice Award

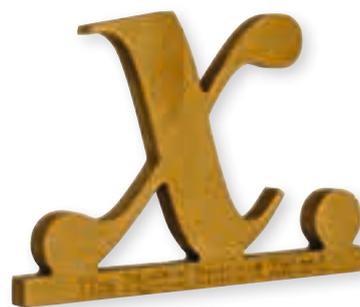
Canada

GNTB Canada named one of the top eight NTOs representing Europe, Middle East and Africa at the Agents' Choice Awards Gala

Global recognition for the GNTB's Nature Experience in Germany VR app

The Nature Experience in Germany VR app scooped the X.Award in the category 'Digital Impact' at the Future.Destination. Brand event organised by the Digital Tourism Think Tank.

The GNTB used its VR app at the 2023 zero conference in Vienna, and was invited to



present it as the 'Most innovative solution' to an international panel of experts during the Technology Forum. The GNTB app was also nominated for the German Digital Award, one of the leading accolades recognising digital creative achievements in the German-speaking countries.

TOP 100 innovation competition: GNTB among the champions for the fourth time in 2024

The GNTB took part in the 'TOP 100 Award for Germany's most innovative SMEs' for the fourth time, and was once again recognised as a champion of innovation. In its application process, the GNTB showcased how important innovations management is as an integral part of overall management as it allows the organisation to continually acquire expertise and quickly react to technological developments in a fast-moving market.

Specifically, the GNTB presented its sustainability strategy and the projects aimed at implementing it, including a detailed system for measuring, monitoring and analysing work processes within its organisation, external processes in its global marketing activities and the overall environmental impact of global tourism to Germany. The Open Data/Knowledge Graph, market research relating to the sustainability dashboard and virtual reality were some of the other topics mentioned in the application.



Platinum status from Green Globe

The GNTB was certified as a Green Globe organisation for the tenth successive year in 2022/23, which led to it being awarded platinum member status, the highest accolade possible under the well-regarded scheme.



GERMANY SIMPLY INSPIRING



Despite geostrategic conflicts, economic crises and the challenges of climate change, there is optimism about global tourism in 2024. Experts from the international travel industry, political decision-makers and partners in Germany's inbound tourism industry are predicting the positive trend to continue. The GNTB is meeting the challenges of digitalisation and green transformation with specific projects and targeted themes.

OUTLOOK

for inbound tourism
to Germany in 2024





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 and their party consider to be the relevant topics in 2024 in relation to inbound tourism.

WE NEED ROBUST MEASURES THAT ACTUALLY HELP THE INDUSTRY, NOT EMPTY WORDS.



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

Our tourism industry has been in a permanent state of emergency since the coronavirus pandemic. Price rises, staff shortages and all manner of pressures are getting worse and becoming increasingly existential. The tourism industry has already reached its limits, and what it needs now more than ever are a clear direction in economic policy and the promise of relief. Despite ongoing budgetary pressures, we must explore all financial and legal options for boosting the economy and protecting jobs if we want future visitors to Germany from near and far to find welcoming hosts.

To achieve this, we need robust measures that actually help the industry, not empty words. Measures such as a return to lower VAT in the restaurant trade, taxes and levies that actually make sense, and less bureaucracy overall. I aim to tackle this together with all stakeholders in tourism policy.

TOURISM TO GERMANY IS PROSPERING DESPITE ALL THE CHALLENGES IT FACES.

The way in which tourism in Germany has recovered in the face of multiple crises is hugely impressive. Demand for travel seems undiminished, as reflected in the rising number of overnight stays by foreign visitors in our beautiful country. A big thank you to the German National Tourist Board for all its hard work in promoting travel to Germany through a range of creative marketing campaigns around the world. We want to ensure that funding for this invaluable work does not fall, even in financially difficult times.

It is very important to us that tourism benefits rural Germany, and not just its towns and cities, as tourism is key to maintaining and enhancing the infrastructure in rural areas. We also believe in attracting suitably qualified employees, as no holiday would be a success without the many dedicated people working across all areas of the holiday industry.



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

WE WILL SUPPORT RESOURCE-EFFICIENT, GREEN AND SUSTAINABLE TOURISM.

In 2024, we will continue to help the industry to develop Destination Germany in a direction that takes economic, environmental and social factors into account. We will support resource-efficient, green and sustainable tourism, for example through major investment in the railways to ensure that visitors from neighbouring countries can enjoy convenient, reliable and sustainable travel to and from Germany. The Bureaucracy Reduction Act IV will be a milestone in cutting red tape, and we aim to abolish the requirement for hotels to register domestic visitors.

Access to skilled labour is another important issue, as the ability to offer a wide range of tourist attractions and options for eating out is only possible with sufficient staff. The updated Skilled Immigration Act is being phased in over the course of 2024 and will take effect in stages. We must make it even easier for foreign workers to access our tourism labour market so as to facilitate integration and highlight Germany's openness.



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

THE GNTB WAS AHEAD OF THE CURVE IN EXPLORING THE USE OF AI IN DIGITALISATION.



Nico Tippelt,
Member of the German Parliament,
Representative of the FDP parliamentary
group in the German Bundestag

The GNTB enjoyed many successes in 2023, including longer stays by overseas visitors, international awards for memorable marketing campaigns and the launch of the open-data project with the go-live of the Knowledge Graph. The GNTB was ahead of the curve in exploring the use of AI in digitalisation, with the aim of safeguarding Destination Germany's competitiveness in the market. It has set a benchmark in this respect, particularly in Europe.

There are many factors that shape the competitive arena, but over which the GNTB has no influence. These include the challenges posed by the shortage of skilled workers, the persistently slow issuing of visas in key source markets, and tax and legal issues – including at EU level – that are causing the industry concern. All this calls for political solutions, and as the FDP's tourism spokesperson I will champion them, as I will the ongoing, appropriate funding of the GNTB even when budgets are tight. It would also be helpful if the GNTB had more scope in deciding the content of its work.

Germany has so much to offer as a holiday destination. The anniversary of the birth of Casper David Friedrich and the European Football Championships held in our country in 2024 are prime examples of how closely culture, history, sport and openness are linked. We benefit from Germany's positive global image, yet we must not fall behind our international competitors. The onus is on us to identify and grasp opportunities in new source markets through effective, modern and impactful international marketing.

As the tourism spokesperson of the CDU / CSU parliamentary group, I will continue to campaign for easier and faster issuing of visas and for more action to combat the shortage of skilled workers. Our infrastructure for caravan travel must be expanded, and our tourism industry requires a boost to ensure it can hold its own in the European market. Accessibility must be developed into a hallmark of tourism in Germany. All of this will safeguard Germany's appeal as a travel destination.



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

ACCESSIBILITY MUST BE DEVELOPED INTO A HALLMARK OF TOURISM IN GERMANY.



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

The AfD believes that policymakers' singular focus on the environment in relation to sustainable tourism is completely upsetting the balance of environmental, economic and social factors. In our tourism policies, we will underline that inbound tourism to Germany needs effective measures to safeguard the future viability of companies in the hospitality, leisure and events industries.

This requires energy security and price stability in Germany. Otherwise, our international visitors' enthusiasm will quickly wane when the lights in the hotel start to flicker, the swimming pool remains cold and dinner overlooking the idyllic wind farms is barely affordable. When it comes to inbound tourism to Germany, the AfD is focused on what is feasible. We leave wishful thinking to our political rivals.

THIS REQUIRES ENERGY SECURITY AND PRICE STABILITY IN GERMANY.

Outlook for Destination Germany in the international market in 2024

Forecasts vary for global tourism

Global tourism is starting 2024 with cautious optimism. The effects of the coronavirus pandemic have largely been overcome, and inflation is falling in key source and target regions for international tourism. The United Nations tourism organisation, UN Tourism, therefore expects global travel patterns to recover completely in 2024. However, the uncertain geostrategic situation is having a dampening effect, while extreme weather events resulting from climate change could shift preferences for holiday destinations.

Germany in a strong position internationally

Amid growing geopolitical tensions, Germany can build on its reputation as a safe travel destination. In the 2023 Anholt-Ipsos Nation Brands IndexSM, a survey of 60 countries, Germany was ranked ninth by respondents for the attribute 'I would feel safe in this country', while 87 per cent consider Germany a 'safe' or 'absolutely safe' travel destination.

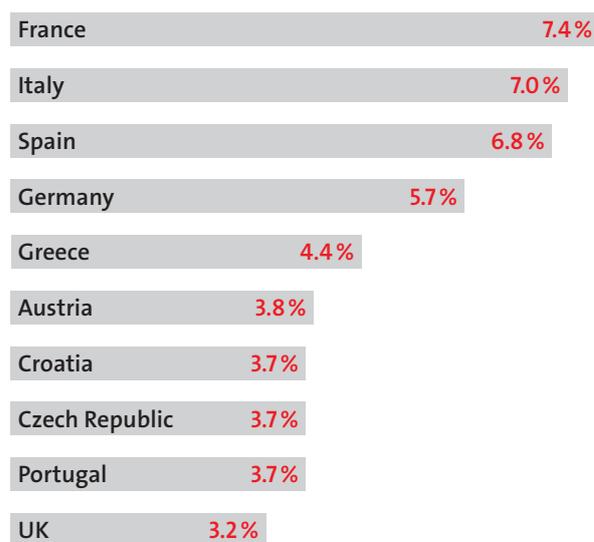
Rising travel costs are increasingly forcing Europeans to change their travel plans. According to the Monitoring Sentiment for Intra-European Travel (MSIET) survey, 22 per cent want to travel in the low season, 13 per cent are considering more affordable destinations, 13 per cent aim to take advantage of early-booker rates and 12 per cent are looking at budget flights. The GNTB has anticipated this change in consumer behaviour by rolling out its 'stay longer' initiative. Extended stays increase the likelihood of mixed holidays, such as city breaks combined with a stay in the surrounding area, and thus help to boost tourism in rural regions. They also make travel in the low season more attractive, which has a positive impact on year-round employment. This in turn improves the quality of service and offers more job security to workers. According to the

IPK 'trend telegram', 73 per cent of travel by Europeans in the first eight months of 2023 was booked in advance. The favourable pricing of German hotels compared to other European destinations is another plus.

In the same MSIET survey from October 2023, Germany was once again the fourth most popular travel destination for Europeans. And overseas, particularly in the high-potential Asian markets, the intention to travel to Europe is on the rise, with Germany the top European destination for visitors from China.

Germany remains one of the most popular destinations for Europeans

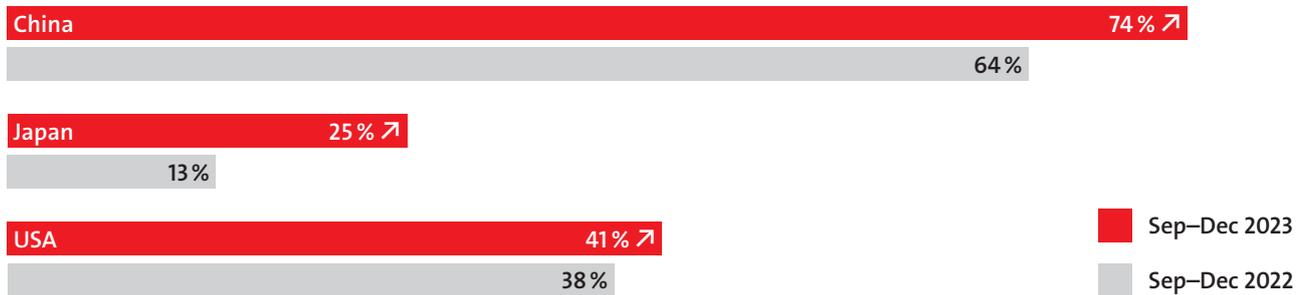
Question: To which countries are you planning to travel next?



Source: ETC Monitoring Sentiment for Intra-European Travel, Wave 17, October 2023; *comparison with survey in September 2022.

Travel intentions from key overseas markets on the rise

Percentage of respondents who are certain or very certain that they want to travel to Europe.



Source: ETC long-haul travel barometer 3 / 2023, October 2023.

Strong potential for further growth in inbound tourism to Germany

The GNTB is focusing on further qualitative growth in 2024 based on a thorough analysis of customer demand and market-specific trends. These factors play a particularly important role in Destination Germany's continued positive growth on the international stage:

- Germany is firmly established as the leading destination for city breaks and cultural travel. Its multi-faceted, high-quality offering meets the changing, varied expectations of demanding target groups.
- Green tourism is becoming ever more important in terms of customer demand and the marketing strategies of the international travel industry. Germany enjoys a strong reputation as a sustainable destination in the international market thanks to a wide range of certified and inclusive offerings.
- Across Europe, holidays abroad continue to feature prominently in consumer spending despite uncertain economic conditions. Thanks to its high quality of service and excellent value for money, Germany is particularly competitive in this respect.

European Football Championships provide an additional boost

A total of 24 countries will play at the European Football Championships this summer. Countless fans are expected to travel to Germany's stadiums and fan parks to see their team in action, especially from football-mad nations in north-west and south-west Europe, which also happen to be key source markets for Germany, but also from high-potential countries in south-east Europe.

Business climate in the travel industry continues to improve

Key accounts in the international travel industry rate their business expectations for Germany at 60 points for the first six months of 2024, a significant increase on the figure for the fourth quarter of 2022. Based on a much more positive assessment of the current business situation, the Business Climate Index for Germany also climbed, from 39 to 51 points.

12 point

rise year on year in the Business Climate Index for Germany in the fourth quarter of 2023

The GNTB's main areas of action in 2024

Key elements of the target agreement between the GNTB and the Federal Ministry for Economic Affairs and Climate Action

Supporting Germany's tourism industry – which predominantly comprises small and medium-sized enterprises – and the country's tourism regions by positioning and marketing Destination Germany in the international market will continue to be the GNTB's core task in 2024.

The post-pandemic recovery presents an opportunity for Destination Germany to drive initiatives worldwide promoting tourism that is more sustainable. Thanks to its well-established position, Germany can shape and add momentum to this process. The fundamental goal of the GNTB during the recovery phase is to place the green, sustainable and digital transformation of tourism in Germany at the heart of its communications in the international source markets.

Market research provides the basis

The GNTB bases all of its activities on the insights contributed by its business intelligence and market research functions. Market research is used to provide the GNTB's management team, the members and sponsors, and the international GNTB offices with data and analyses to optimise commercial decision-making. The GNTB will also make this information available to the tourism industry, particularly small and medium-sized enterprises.

Digital market and digital marketing

The GNTB will collaborate with all relevant tourism partners to support the strategic digitalisation of tourism in Germany, especially in the field of open data, continue the work it has done so far and drive forward this development. The aim is to give everyone access to marketing and other data, and to make it easier to find content about Germany as a travel destination across all relevant channels. Another area of focus is facilitating the creation of new business models along the

entire tourism value chain, thus ensuring that Destination Germany remains at the forefront both commercially and technologically.

Focus of marketing and marketing tools

The GNTB promotes green tourism and barrier-free travel as overarching themes and as key facets of the Destination Germany brand and of the German government's tourism policy. One of the ways in which the GNTB achieves this is by using data on barrier-free offerings featuring the Travel for All certification in its marketing. Another overarching marketing theme is tourism in rural regions. One particular aim in this area is to raise awareness of lesser-known tourist regions, to encourage foreign visitors to extend their stay and to maximise the potential for tourism in Germany's holiday regions.

IN ADDITION TO BOOSTING VALUE CREATION IN INBOUND TOURISM, THE AIM IS TO PLACE THE FOCUS ON THE IMPORTANCE OF CLIMATE ACTION AND ENVIRONMENTAL PROTECTION IN TOURISM.



Culture and history are key themes in 2024

Current and future campaigns

Germany has an exceptional arts scene and cultural life. This diversity is integral to the quality of urban life and a strong draw for international tourists. The GNTB is using targeted theme-based marketing in 2024 to further boost Germany’s position as a sustainable cultural travel destination.

52 UNESCO World Heritage Sites Historic.Modern.Germany.

The GNTB is continuing its ‘UNESCO World Heritage Sites’ campaign in 2024 with additional tips and travel information. The campaign draws the attention of potential 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. The 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. Developed in partnership with the World Heritage Association, the travel routes present sustainable travel ideas, many of which are certified. The GNTB’s ‘Stay longer’ initiative encourages longer stays in Germany with the aim of reducing the proportional carbon footprint per day of holiday.

Cultureland Germany

Germany's cosmopolitan cultural and arts scene is a defining feature of urban centres and rural regions. The GNTB will be launching a new inspiration campaign in April 2024 that picks up on this strong positioning and showcases sustainable travel experiences in Germany in a cultural context.

The campaign reflects the many facets of Germany's cultural offering across the four clusters

- Design.Culture.Travel.
- Art.Culture.Travel.
- Wine.Culture.Travel.
- Music.Culture.Travel.

Specific areas of focus are contemporary art, cultural hotspots where artists work, modern architecture, unusual exhibition spaces and street art as an expression of lifestyle in the public arena.

The spectrum of cultural life also includes genre-spanning events of international renown, 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 GNTB is also using the campaign to highlight notable personalities who represent Germany's cultural *zeitgeist*, such as curators, aspiring artists and private collectors.



2024 RELAUNCH OF THE GLOBAL LEAD CAMPAIGN FOR SUSTAINABILITY.

Simply Feel Good

Germany has a growing reputation around the world as a sustainable destination, with the increasing number of certified offerings from German tourism providers the main driver of this trend. The GNTB will continue to use this positive awareness in 2024 and relaunch its global 'Simply Feel Good' lead campaign on sustainability. Its key aim is to make certified offerings more visible internationally and to actively promote them.

The campaign focuses on Germany's pioneering role when it comes to environmental certifications, nature conservation and the shift to green energy. Green travel is increasingly taking centre stage in marketing with the aim of reducing carbon emissions. A landing page at www.germany.travel/feelgood showcases ideas for sustainable travel.

Christmas

Germany is known throughout the world for its Christmas customs and traditions. For decades, the GNTB has provided inspiration for holidays in Germany during the festive period through its 'Season's Greetings from Germany' campaign. It brings fresh ideas to city tourism and cultural tourism, helps to promote retailers, hotels, restaurants and cafés, and contributes to the positioning of Germany as a sustainable destination.

Strategic campaign objectives at a glance

- Promote local culture and products
- Boost sustainable tourism offerings in the market
- Support the local economy and small and medium-sized partners
- Preserve natural and cultural heritage sites



Key themes

250th anniversary of the birth of Caspar David Friedrich

The 250th anniversary of the birth of the Romantic painter Caspar David Friedrich will be marked in style in Germany. Places associated with his legacy – from cultural hotspots such as Berlin, Hamburg and Dresden to rural areas in Mecklenburg-Vorpommern, Saxony and Saxony-Anhalt – will host numerous exhibitions and events that highlight key aspects of German Romanticism and their influence on European culture. The GNTB will use the various activities and initiatives connected to the anniversary to provide additional reasons to travel and inspire culturally minded holiday-makers to visit Germany.

UEFA EURO 2024

Working with EURO 2024 GmbH, a joint venture between UEFA and the German Football Association (DFB) tasked with organising the tournament, the GNTB will encourage potential visitors to Germany to extend their visit beyond just the host cities and explore the surrounding regions and countryside as well. The focal point will be the cultural programme around the football matches through which the EURO 2024 host cities aim to promote themselves as a destination for locals and for domestic and international visitors.

35 years since the fall of the Berlin Wall

Germany has a growing reputation as a modern, cosmopolitan, sustainable and service-oriented travel destination. A key moment in recent history is the fall of the border between East and West Germany in November 1989, and reunification in October 1990. In its global social media campaign, the GNTB is using the 35th anniversary of the fall of the Berlin Wall as an opportunity to showcase the new, modern approach to presenting the tourism highlights that emerged at that time. The GNTB will focus on cultural themes and nature and active holidays, and is planning an influencer campaign to promote the eastern federal states as places for a workation.

Chemnitz, European Capital of Culture 2025

After West Berlin in 1988, Weimar in 1999 and the Ruhr metropolitan region in 2010, Chemnitz is the next German city to be named European Capital of Culture. Under the banner 'C the unseen', Central Saxony – an area with a rich cultural history that includes Zwickau, Chemnitz and the Erzgebirge mountains – will feature 65 major international projects and hundreds of initiatives that bring the transformation of this former industrial region to life. In cooperation with Chemnitz Tourism, the GNTB will be promoting the event from 2024 onwards, targeting potential visitors to Germany in the international source markets.

The perspective of the regional tourism organisations

The heads of the regional tourism organisations of the 16 federal states outline the greatest challenges and opportunities for the growth of inbound tourism to Germany in 2024.

After finally leaving the pandemic and its impact on tourism behind us in 2023, we are now dealing with issues such as rising costs and the shortage of skilled workers. Our attention is also increasingly turning to the technological transformation of our industry. This is both a challenge and an opportunity, as artificial intelligence and data management are evolving at a much quicker pace. So it is reassuring to know that the federal states and the GNTB have successfully launched the Knowledge Graph. But this is just the beginning. We must now increase the speed of our response, get all levels of tourism on board and keep our eye on the ball.

Baden-Württemberg



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

Bavaria



Barbara Radomski, Managing Director
of Bayern Tourismus Marketing GmbH

According to UN Tourism, the appetite for travel has recovered around the world since the pandemic, and it will continue to grow. Inbound tourism to Germany, and to Bavaria in particular, will benefit from this. Demand for tailored offerings is higher than ever, especially in the neighbouring markets that are so important to Bavaria. The challenge here is to maintain the quality and diversity of the tourism offering despite the prevailing economic conditions and, specifically, the current situation in the job market.

We are optimistic about 2024. With UEFA EURO 2024 taking place in Berlin and the 35th anniversary of the fall of the Berlin Wall, our city is staging major events that are already creating a buzz around the world. Culture is another major driver of international tourism, and Berlin remains one of the top European destinations alongside London and Paris. We will use technological developments such as AI to make travel easier and more convenient for our visitors.

Berlin



Burkhard Kieker,
Managing Director of visitBerlin

Brandenburg



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

Managing the effects of multiple crises will remain a challenge in 2024. As we experienced in recent years, the tourism sector is not immune to them; in fact, it needs to react quickly as conditions change. This gives rise to opportunities, with time and effort put into the necessary changes. Prime examples are the collaboration on the GNTB Knowledge Graph and the Open Data Tourism Alliance. Delivering on these and other digitalisation strategies will continue to play an important role this year.

With inbound tourism to Bremen in 2023 matching the record levels of 2019, we are feeling very positive, and quite relieved! This growth has been driven by our extensive marketing, by the ongoing trend for short breaks and by demand for visits to 'second cities'. Insider tips, 'niche cities' and local experiences are growing in importance. We are responding to rising awareness of the need to be more sustainable by creating credible offerings. The development of artificial intelligence is gathering pace and presents many opportunities for digitalisation, some of which we explored at length last year and are now implementing in travel apps and chatbots, for example.

Bremen



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

Hamburg



Michael Otremba, Managing Director of Hamburg Tourismus GmbH

The success of our industry is based on being open and welcoming, two factors that are at the heart of our free, democratic society. Our hospitality industry is second to none, and we are able to welcome visitors in beautiful and unforgettable destinations. If we receive people from different backgrounds and with different needs in an open and friendly manner, holidays become cherished experiences and our country a destination people long to visit. We have a responsibility to ensure that we remain a society that welcomes the world.

As a regional tourism organisation, we raise awareness across the Hessen area of the latest tourism data. 'Higher, faster, further' is no longer appropriate for the current developments in the industry, which is why we are establishing a new market research platform in Hessen. The intelligence it provides will help our partner organisations to market and manage their destinations. Investing in the ability to work with digital dashboards will pay dividends in the long term. This is our contribution to strong inbound tourism to Germany.

Hessen



Herbert Lang, Head of Tourism, HA Hessen Agentur GmbH

Mecklenburg-Vorpommern



Tobias Voitendorf, Commissioner for Tourism of the State of Mecklenburg-Vorpommern and Managing Director of Tourismusverband Mecklenburg-Vorpommern e.V.

Making our industry ever more international must be at the top of the agenda in Mecklenburg-Vorpommern. In collaboration with our partners across the region, we are launching a new strategy that focuses on targeted marketing in our main source markets. This will ensure that the strengths of Germany's north-east – its natural beauty, cultural treasures and open spaces – attract as many people as possible to our federal state. In addition to clever marketing ideas, success also depends on accessibility, suitable products and good infrastructure. We must continue to work on all these areas, and hope for peace and greater understanding around the world, of course.

We will continue to focus our efforts on creating higher-quality and more sustainable offerings, as demand for these remains high in our international source markets. There is also considerable potential when it comes to matters of transport, which is why we have established a dedicated department at TMN. The option for green travel is a key factor in driving inbound tourism. Another significant factor is digitalisation. By continually refining the Niedersachsen Hub and systematically expanding the range of open data across Germany, we can ensure that international visitors enjoy the best possible travel and holiday experiences.

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.

Demand for travel to North Rhine-Westphalia is high again, yet inbound tourism is still catching up. That is why we must make our content more international and, most importantly, showcase it in digital channels. To this end, we are launching the Tourism Data Intelligence Initiative NRW, which will make extensive use of AI. We will continue to work closely with the GNTB to place the right content in international source markets. The European Football Championships held in Germany in 2024 will offer the first opportunity for data-based services and innovative content to prove their worth.

Times are changing, and never more rapidly than now. Trends, key figures and indicators are constantly shifting, geopolitical developments move quickly – sometimes, very quickly – and the problem of climate change remains essentially unsolved. Attempting to meet all these challenges alone is almost impossible, and also not advisable. The solution is to work together, strike up partnerships and share knowledge and ideas. It is essential that the players in tourism to Germany present a joint front on the international market if the success of inbound tourism is to continue.

Rhineland-Palatinate



Stefan Zindler, Managing Director of Rheinland-Pfalz Tourismus GmbH



Saarland

Birgit Grauvogel, Managing Director of Tourismuszentrale Saarland GmbH

Saarland is also facing the huge challenge of overcoming the shortage of skilled workers, which has an impact on the quality of the offerings and on customer satisfaction. We are working on a holistic climate adaptation and protection strategy for tourism to Saarland to ensure that we are ready for a more sustainable future. We believe that 2024 offers opportunities to target new visitor groups, mainly through cultural events such as the Saar Polygon Opera Festival and the Apollon Visual Art Festival, and major sporting occasions such as the Deutschlandtour cycling event and the Paris Olympic Games across the border in France.

Almost all markets in which TMGS is active recovered well in 2023, with Poland, Austria and the Czech Republic even surpassing the figures from 2019 over the summer. That is cause to feel optimistic about 2024. Chemnitz and 38 surrounding municipalities have been named the European Capital of Culture in 2025, and the GNTB will be holding the 2024 GTM in Chemnitz to mark the occasion. Both events are a great chance to raise awareness of our unparalleled tourism offering around the world. Nevertheless, the global political and economic situation remains a challenge that could diminish the appetite for travel and impact on travel budgets in 2024.

Saxony



Veronika Hiebl, Managing Director of Tourismus Marketing Gesellschaft Sachsen mbH

Together with our regional partners, and with one eye on our 2027 tourism master plan, we are working to promote the sustainable development of the sector in Saxony-Anhalt. The focus is on quality, tourism acceptance, the balanced use of resources, and private and public investment to ensure economic success. We value the GNTB as a reliable partner at all levels, particularly in the fields of digitalisation, sustainability, internationalisation and market research, and are grateful for the many opportunities to participate in successful marketing ventures and appear alongside the GNTB in our international source markets.

Saxony-Anhalt



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

The future belongs to the brave! Agility and flexibility are perennial success factors, even in these uncertain times. As the tourism agency for Schleswig-Holstein, we cater to our loyal domestic visitors, of course, but we also want to inspire more visitors from nearby countries to experience Germany's true north. Thanks to the tireless work of the GNTB, global awareness of, and interest in, Destination Germany – and thus Schleswig-Holstein – is on the up. The cooperation projects are invaluable in raising Schleswig-Holstein's profile as an attractive tourism destination and location for conferences and similar events. A big thank you to the entire GNTB team!

Schleswig-Holstein



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

The main challenge for inbound tourism to Germany in 2024 lies in conveying sustainability in a consistent way, and Thuringia's premium partnership in the GNTB's Feel Good campaign is one example of how to achieve this. Thanks to the GNTB, Germany is perceived as a sustainable holiday destination in the international market. The current turbulent times harbour both opportunities and challenges. The growing desire to experience nature and relax, and the trend for second holidays during the low season, present opportunities that we want to grasp in Thuringia.

Thuringia



Christoph Gösel, Managing Director of Thüringer Tourismus GmbH



All change and digitalisation projects are reviewed and refined as part of the continuous improvement to the way that processes are organised. Additional IT investments in the areas of cloud computing and system security strengthen the foundations of the digital organisation in the medium to long term. The further refinement and development of internal processes ensure that they are even more closely aligned to the requirements of day-to-day operations.



INTERNAL PROCESSES IN 2023

and organisational structure in 2024

Administration

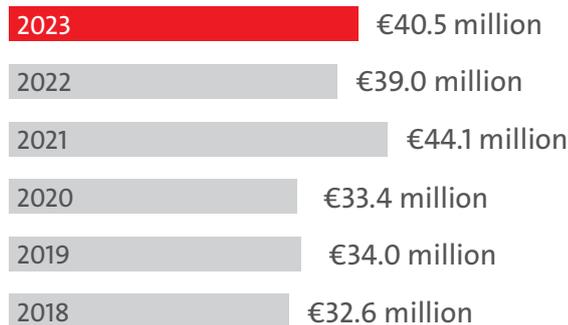
The GNTB continually optimises its internal organisation to create the ideal environment – in terms of finance, personnel and technology – for its day-to-day operations.

Financial management

The focus of financial management is on using the available funding efficiently and prudently, and on continually digitalising processes. Digital processing of purchase invoices was introduced in 2023 and the systems were put in place for the timely launch of digital sales invoicing at the start of 2024.

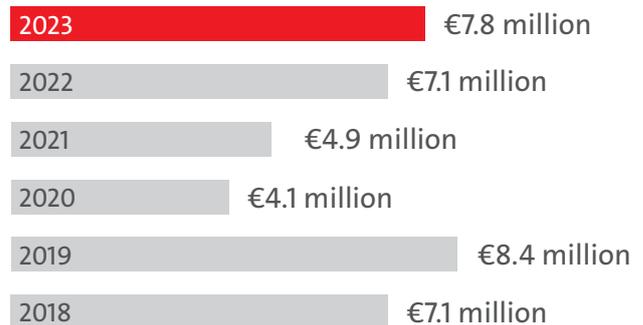
Grants from the BMWK

Income: The additional increase in funding from the Federal Ministry for Economic Affairs and Climate Action (BMWK) ensures the continuity of the GNTB's work and further boosts the recovery.



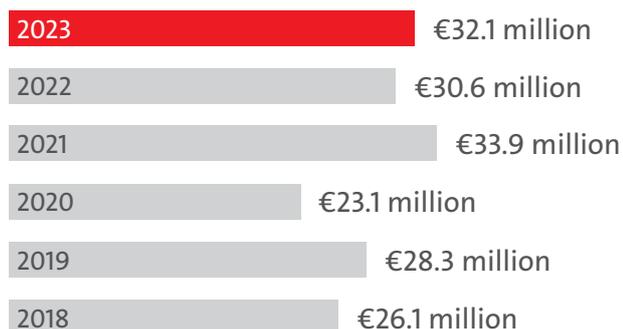
Income from services

The GNTB was able to build on success of the pre-pandemic years in 2023, generating particularly strong income from services following the resumption of major events.



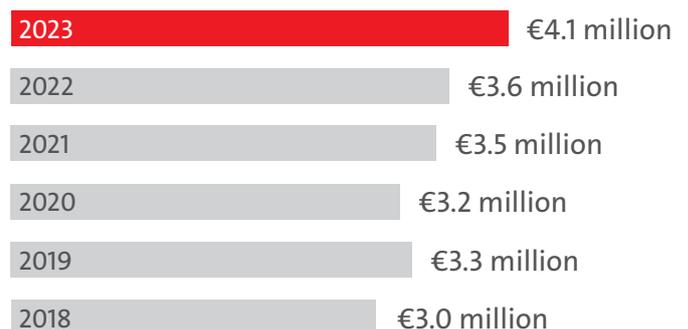
Marketing spend

Global marketing of Destination Germany accounts for around two-thirds of all spend. Despite higher infrastructure costs, the GNTB was able to match the prior year's figures, while the additional funds and the level of self-generated funds ensured that there was additional scope for action on the operational front.



Other operating expenses

Making the most of the potential for savings ensures a balanced budget despite inflation. Initial locations for the introduction of New Work approaches are being examined, while downsizing when moving offices has provided savings on rent and related costs.



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	2023	%	2022	%	2021	%	2020	%	2019	%	2018	%
Income from services	7,810	15.9	7,157	15.2	4,935	9.9	4,122	10.8	8,392	19.5	7,058	17.4
Grants from the BMWK	40,522	82.6	39,052	83.2	44,126	88.5	33,399	87.3	33,950	78.7	32,607	80.6
Grants and contributions from members	725	1.5	749	1.6	782	1.6	732	1.9	780	1.8	790	2.0
Income from GNTB budget²⁾	49,057	100.0	46,958	100.0	44,843	100.0	38,253	100.0	43,122	100.0	40,455	100.0
Income from special projects ³⁾	126		135		116		123		303		257	
Total income (consolidated)	49,183		47,093		49,959		38,376		43,426		40,712	
Additional income from non-cash contributions	904		927		817		416		2,182		2,877	
Expenditure	2023	%	2022	%	2021	%	2020	%	2019	%	2018	%
Personnel expenditure for marketing and administration	12,891	26.3	12,659	27.0	12,453	25.0	11,984	31.3	11,513	26.7	11,385	28.1
Other operating expenses	3,173	6.5	3,279	7.0	3,110	6.2	3,006	7.9	2,944	6.8	2,758	6.8
Capital investment	878	1.8	409	0.9	357	0.7	196	0.5	373	0.9	257	0.6
Marketing spend	32,115	65.4	30,611	65.2	33,923	68.1	23,067	60.3	28,292	65.6	26,055	64.4
Expenditure from GNTB budget²⁾	49,057	100.0	46,958	100.0	49,843	100.0	38,253	100.0	43,122	100.0	40,455	100.0
Expenditure on special projects ³⁾	126		135		116		123		303		257	
Total expenditure (consolidated)	49,183		47,093		49,959		38,376		43,426		40,712	
Use of additional income from non-cash contributions	904		927		817		416		2,182		2,877	

Human Resources, Legal, Central Services

The GNTB employment plan for 2023 covered 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 2022. Of this total, 76.1 FTEs were at head office, 75 were based abroad, and there were two executive positions. On 1 August 2023, Stephanie Heidenreich succeeded Reinhard Werner as Commercial Director.

When the Deutschlandticket – a discounted ticket for local public transport – was introduced, the GNTB joined forces with the Federal Office for Central Services and Unresolved Property Issues to offer it to all GNTB staff in Frankfurt as an employer-subsidised travel card.

In HR, file management was switched to an electronic format provided by the payroll service provider.

Promoting new talent at the GNTB

The GNTB's 17 young recruits comprise nine apprentices, six degree apprentices and two graduate trainees.

Degree apprenticeships

In 2023, the GNTB continued its long-standing commitment to offering degree apprenticeships. Three apprentices took their final exams at the Chamber of Commerce and Industry in the recognized 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.

The broad scope of the apprenticeship at the GNTB helps the apprentices to regularly achieve very good exam results. For example, one of them was named the best tourism apprentice in Hessen in 2023.

Degree apprenticeships

The degree apprenticeship in tourism management offers school leavers a combination of theory and practical experience. Six young recruits put the theory they learn at university into practice at the GNTB. During their apprenticeship, they go through six practical assignments during which they support projects and day-to-day business. The purpose of the degree apprenticeship is to develop talented young prospects and prepare them for a career in tourism.

The graduate trainee programme

The graduate trainee programme was once again part of the GNTB's commitment to developing young talent, beginning with two trainees in 2023.

In addition to two marketing modules, in which the young graduates work on their own projects, the 18-month programme gives them the opportunity to gain further experience abroad. Once the programme has been completed, there is the option of permanent employment at one of the GNTB's offices in Germany or abroad, or at another company in the tourism sector.

Continuing professional development

The GNTB organised over 50 training sessions for employees around the world in 2023. The majority of people took part online, which was particularly resource-efficient and saved time on travel. The focus was primarily on continuing professional development in various areas of work and on developing interpersonal skills. Classroom-based events were mainly attended by international colleagues and used for training conducted inhouse by external providers.

Data protection at the GNTB

Increasing digitalisation and the need to lay the groundwork for the use of artificial intelligence presented a challenge in 2023 when it came to data protection at the GNTB. In agreement with the GNTB's data protection officer, personal data was always processed in accordance with applicable data protection laws, such as GDPR in the EU and any country-specific data protection regulations that apply to the GNTB.

GNTB members, sponsors and partners

The GNTB brings together industry players at all levels in order to position Destination Germany in the international market.

Members

Companies

A · Amadeus Germany GmbH · Avis Budget Autovermietung GmbH & Co. KG · **B** · BWH Hotels Central Europe GmbH · **D** · DB Fernverkehr AG · Deutsche Hospitality · 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 · **H** · HanseMerkur ReiseVersicherungsgruppe · Hilton · **J** · JCB International Ltd. Branch · **M** · Maritim Hotelgesellschaft mbH · Mastercard Europe SA · McArthurGlen Service GmbH · Messe Berlin GmbH · **N** · Novum Hospitality · **O** · Outletcity AG · **P** · Passionsspiele Oberammergau Vertriebs GmbH & Co. KG · **R** · Ringhotels e.V. · **S** · Sixt SE · **T** · TUI AG · **V** · Value Retail Management Germany GmbH · 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) · Deutscher Reise Verband 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

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. (BVG) · **C** · Citta-slow Deutschland e.V. · **D** · Deutsche Gesellschaft für Tourismuswissenschaft e.V. (DGT) · **H** · Hochschule Heilbronn – Fakultät für International Business · **I** · IPK International GmbH · **P** · Pacific Asia Travel Association (PATA) · **P** · PROJECT M GmbH · **R** · Romantische Straße Touristik-Arbeitsgemeinschaft GbR · **S** · Staatsbad Norderney GmbH · **T** · Toskanaworld GmbH · **T** · 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.

As at February 2024

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



Heike Birlenbach
Senior Vice President
Customer Experience at
Lufthansa Group



Andreas Braun
Managing Director of
Tourismus Marketing GmbH
Baden-Württemberg (TMBW)



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



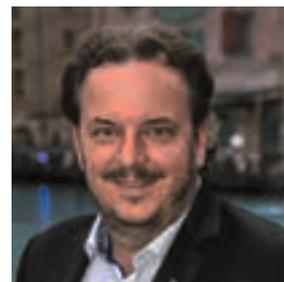
Benedikt Esser
President of the RDA
International Coach
Tourism Federation



Norbert Fiebig
President of the German
Travel Association (DRV)



Karina Kaestner
Vice President,
Partner Management,
DB Fernverkehr AG



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

Other elected members



Gerhard Griebler
 Managing Director
 of Passionsspiele
 Oberammergau
 Vertriebs GmbH & Co. KG



Regine Sixt
 Senior Executive Vice
 President
 Sixt International 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)



Monika Wiederhold
 Executive Vice President,
 Marketing and Digital
 Transformation,
 Amadeus IT Group S.A.

Ministerial representatives



Dr Armgard Maria Wippler
 Head of Sub-department VII A
 – SME Policy, Service Economy
 and Coronavirus Programmes,
 Federal Ministry for Economic
 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.)

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



Members of the GNTB Advisory Board

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 Economics
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 Iris Reimold

Head of Department G 10 – Policy Matters, Finance Policy and Competition Policy, Federal Ministry for Digital and Transport

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 Justice and Migration

Bavaria

Ministerial Counsellor Gabriele Fink
Bavarian Ministry for Food, Agriculture, Forestry and Tourism

Berlin

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

Brandenburg

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

Free Hanseatic City of Bremen

Dr Christel Lübben
Head of Retail/Tourism
Senator for the Economy, Ports and Transformation

Free Hanseatic City of Hamburg

Bernd Meyer
Head of Tourism
Office for Economic Affairs and Innovation

Hessen

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

Mecklenburg-Vorpommern

Gunnar Bauer
Head of the Tourism Support Department
Ministry of Economic Affairs, Infrastructure, Tourism and Labour

Lower Saxony

May-Britt Pürschel
Head of Tourism and Creative Economy

Ministry of Economics, Transport, Construction and Digitalisation

North Rhine-Westphalia

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

Rhineland-Palatinate

Ute Meinhard
Head of Tourism Policy/
Tourism Marketing
Ministry of Economy, Transport, Agriculture and Viticulture

Saarland

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

Saxony

Frank Ortmann
Head of Tourism
Ministry for Science, Culture and Tourism of the State of Saxony

Saxony-Anhalt

Elmar Heisterkamp
Head of Tourism and Location Marketing
Ministry for Economic Affairs, Tourism, Agriculture and Forestry

Schleswig-Holstein

Dr Birte Pusback
Head of Tourism
Ministry of Economic Affairs, Transport, Employment, Technology and Tourism

Thuringia

André Störr
Head of Tourism and Hospitality
Ministry of Economic Affairs, Science and Digital Society

Members of the GNTB International Marketing Committee

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

Elected members

Benedikt Brandmeier

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

Anna Graf

Innovation Lead, Web3 / Metaverse
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

Regional marketing organisations

Baden-Württemberg

Andreas Braun
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 up to 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

Monika Wiederhold
Executive Vice President
Marketing and Digital Transformation
Amadeus IT Group S.A.

Avis Budget Autovermietung GmbH & Co. KG

Julietta B. Rehnelt
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

Marcel Noe
International Marketing Manager

Deutsche Hospitality

Johanna Lamke
Vice President, Sales

Deutsche Lufthansa AG

Fabiola Nau
Leisure Sales, Home Markets

Deutscher Heilbäderverband e.V. (DHV)

Brigitte Goertz-Meissner
President

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

Ingrid Hartges
CEO

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

Dorint GmbH

Oliver Stotz
Vice President, Marketing

ERGO Reiseversicherung AG

Iris Nebbe
Sales Management

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

Daniela Zeh
Marketing and Customer Value
Creation Manager

HanseMercur Versicherungsgruppe

Susanne Löbkens
Sales Director

Hilton

Natascha Hendrichs
Senior Manager, Destination Marketing,
Continental Europe

Historic Highlights of Germany e.V.

Sascha Mayerer
Managing Director

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

McArthurGlen Service GmbH

Claudia Pfannstiel
Center Marketing Manager

Messe Berlin GmbH

Deborah Rothe
Exhibition Director, ITB Berlin

Novum Hospitality

Christian Moll
Deputy Chief Executive Officer

Passionsspiele Oberammergau Vertriebs GmbH & Co. KG

Gerhard Griebler
Managing Director

Ringhotels e.V.

Michaela Krohn
Head of Marketing and PR

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.

Claudia Schwarz
Chairwoman

Value Retail Management Germany GmbH

Christina Gobil
Destination Marketing Director

Visa Europe Management Services Ltd.

Ulrich Keppler
Merchant Business Lead,
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

UK/Ireland

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

GNTB foreign representative office

United Kingdom/Ireland
60 Buckingham Palace Road
London, SW1W 0AH

Belgium/Luxembourg

Kristina Hansen
kristina.hansen@germany.travel
Tel: +32 (0)22 404 581

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

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

Marketing through

Valve Communications Oy

Norway

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

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

GNTB sales and marketing agency

Sweden
c/o Deutsch-Schwedische Handelskammer
Tyska Turistbyrån 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

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

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., H-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 (interim)
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

Goldi Müller
goldi.mueller@germany.travel
Tel: +972 (0)35 135 307

GNTB sales and marketing agency Israel

c/o Lufthansa German Airlines
The Brain Embassy, Building C,
11th Floor, 2D, Ha-Shlosha Street
6706058, Tel Aviv

Canada

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., No. C18,
Second Floor, C-Block Main Market, Vasant
Vihar, New Delhi-110057

Arab Gulf States

Yamina Sofu
yamina.sofu@germany.travel
Tel: +971 (0)4 447 0588

GNTB sales and marketing agency

Arab Gulf States

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

China

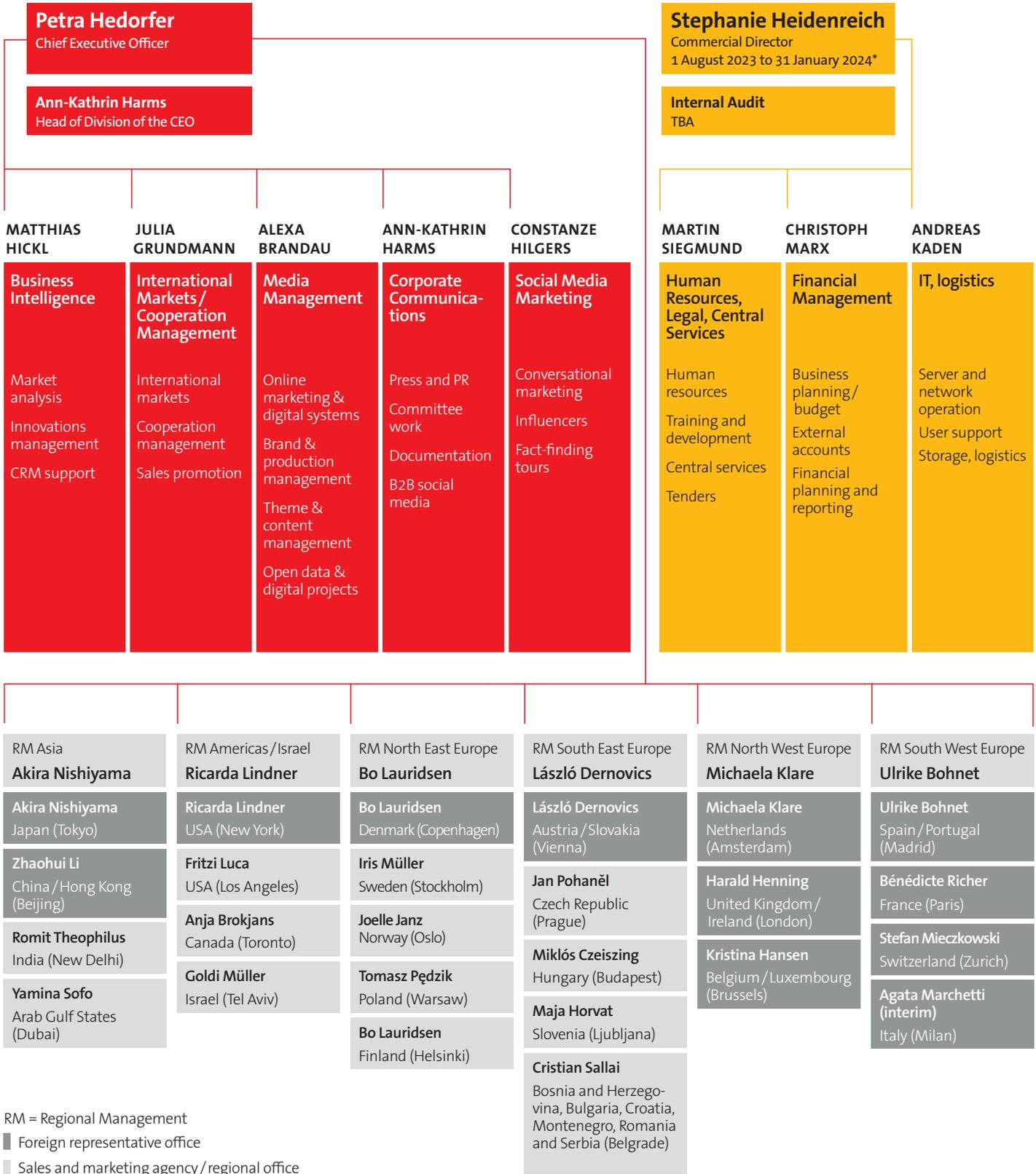
Zhaohui Li
zhaohui.li@germany.travel
Tel: +86 (0)10 6590 6406

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 January 2024



* Reinhard Werner, Commercial Director, retired on 31 October 2023

Benedikt Esser, interim member of the Executive Board from 28 March to 31 July 2023

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M.A.D. Public Relations GmbH

Printed by

Bonifatius GmbH
www.bonifatius.de

Design and layout

eckedesign, Berlin

Translation

LingServe Ltd.
www.lingserve.de

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Published by:

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

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

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



www.germany.travel