83.9 million overnight stays

6.7 million promotable business trips to Germany by Europeans

35.1 billion spent on travel to Germany by Europeans

31.6 million holiday trips by Europeans

121.5 million overnight stays possible by 2030

47.1 million overnight stays in cities with over 100,000 inhabitants
Inbound travel to Germany: eighth record result in a row

83.9 million international overnight stays in 2017
1st place as a cultural travel destination for Europeans
Source: GNTB/WTM 2018

1st place worldwide as an international trade fair destination
Source: AUMA 2017

1st place in Europe as an international conference destination
Source: ICCA 2017

1st place as a city break destination for Europeans
Source: GNTB/WTM 2018

1st place in Europe as a destination for international luxury travel
Source: GNTB/WTM 2017

2nd place as a travel destination for young Europeans (aged 15 to 24)
Source: GNTB/WTM 2018

1st place on the demand side of 50 countries worldwide
Source: Anholt-GfK Roper Nation Brands Index 2017 report

3rd place on the supply side in a global comparison of 136 countries
Source: 2017 Travel & Tourism Competitiveness Report, World Economic Forum

3rd place 2018 Best Country Report
Germany scores highly thanks to its strong economy, worldwide influence and commitment to important global challenges.
Source: News & World Report 2018

5th place as an economic power in a global comparison of 137 countries
Source: Global Competitiveness Report, World Economic Forum 2017

INTRODUCTION
Global tourism is continually growing.

International tourism has risen to 1.3 billion arrivals.

The destination regions of Europe and Africa showed the highest rates of growth in 2017. International arrivals will increase by a further 4 to 5 per cent in 2018.
Since 1993 the number of **overnight stays by foreign visitors to Germany** has risen by **49.2 million**.

Global demand is growing: up by **142%** since 1993.

Overnight stays made by visitors from outside Germany in millions since 1993.

Total figures for each year include overnight stays from unspecified countries (around 1.7 million in 2017).

Source: Federal Statistical Office, 2018
Most important source markets worldwide for Germany in 2017.

<table>
<thead>
<tr>
<th>Country</th>
<th>Trips in 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>11.2</td>
</tr>
<tr>
<td>Switzerland</td>
<td>6.7</td>
</tr>
<tr>
<td>USA</td>
<td>6.2</td>
</tr>
<tr>
<td>UK</td>
<td>5.6</td>
</tr>
<tr>
<td>Austria</td>
<td>4.0</td>
</tr>
<tr>
<td>Italy</td>
<td>3.7</td>
</tr>
<tr>
<td>France</td>
<td>3.5</td>
</tr>
<tr>
<td>Denmark</td>
<td>3.3</td>
</tr>
<tr>
<td>Belgium</td>
<td>3.1</td>
</tr>
<tr>
<td>Poland</td>
<td>2.9</td>
</tr>
<tr>
<td>China</td>
<td>2.9</td>
</tr>
<tr>
<td>Spain</td>
<td>2.8</td>
</tr>
</tbody>
</table>

International overnight stays in 2017: 83.9 million

The Netherlands remains the most important source market for Germany.

Destination Germany the second most popular destination for Europeans for the eighth year running.

Spain: 67.0 million trips in 2017
France: 41.0 million trips in 2017
Germany: 56.2 million trips in 2017

Source: GNTB/World Travel Monitor, IPK 2018
Germany has a disproportionately large share of the international business travel market and is generating growing demand in the leisure sector.

Promotable business trips to Germany by Europeans have the largest market share, with 6.7 million in 2017.

Total volume in 2017: 12.9 million trips (+1.5 per cent)

- **48%** traditional business trips (+3.6 per cent)
- **17%** Trade fairs and exhibitions (-6.9 per cent)
- **31%** Conferences and conventions (+0.2 per cent)
- **52%** promotable business trips (-0.3 per cent)
- **4%** Incentive travel (+33.0 per cent)

Market share (change compared with 2016)
Cars and planes are the most important modes of transport for trips made by Europeans to Germany.

All trips from Europe to Germany in 2017: 56.2 million (+5.0 per cent)

- **CAR**: 49% (2017/16 (+7.4 per cent))
- **PLANE**: 32% (2017/16 (+3.2 per cent))
- **COACH**: 9% (2017/16 (+7.9 per cent))
- **TRAIN**: 7% (2017/16 (+3.8 per cent))
- **OTHER**: 3% (2017/16 (-17.0 per cent))

In 2017 travel expenditure** on trips to Germany by visitors from Europe came to €35.1 billion, an increase of 9.0 per cent on 2016.

**all travel expenditure for transportation, accommodation, food, shopping, etc. while staying in Germany, as well as travel to, from and within Germany.

A multi-channel strategy is a must for travel to Germany in order to succeed in the international market.

**Source: GNTB/World Travel Monitor, IPK 2018**

**Tourist information**: 3%

**Other**: 11%

**Direct booking of travel**: 13%

**Travel agency**: 17%

**Direct booking of accommodation**: 26%

**Internet**: 84%

Share of bookings in 2017 (%)
As well as being a popular destination for holidays, Germany has an **above-average share** of the **international business travel market**.

**Trips to Europe from overseas**: 19%

**Trips to Germany from overseas**: 28%

- Business trips: 19%
- Holidays: 68%
- Other private trips: 13%

**Air travel is the dominant means of transport for trips to Germany from overseas**.

All trips to Germany from overseas* in 2017: 7.9 million (+9%)

In 2017 **travel expenditure** on trips from overseas* to Germany came to **€23.6 billion**, up by **16 per cent** on the previous year.
An increase of 3.6% in 2017

Overnight stays by foreign visitors to Germany in 2017 by federal state.

Source: Federal Statistical Office 2018
Germany’s major cities are particularly popular.

56% in destinations with over 100,000 inhabitants

23% in destinations with 10,000 - 100,000 inhabitants

21% in destinations with fewer than 10,000 inhabitants

Distribution of international overnight stays in German towns and cities by size in 2017.

Rural regions are an important facet of Germany’s global marketing.

place for Germany as a destination for nature-based travel* among Europeans travelling worldwide.

3rd

30% of foreign holidaymakers in Germany consider landscape and scenery an important reason for travel**.

% growth (2005 – 2017) in overnight stays by foreign visitors in smaller towns and villages*** (up to 10,000 inhabitants)

Source: Federal Statistical Office 2018

International overnight stays could increase by 80% by 2030.

Global tourist traffic will continue to grow over the coming years.

The UNWTO expects 1.8 billion international arrivals by 2030.

South American countries with high potential.

1.3 million trips to Europe from Argentina and Chile alone.

Almost two million additional overnight stays* in Germany by 2030
*excluding camping; figures are rounded (regional classification as per UNWTO) Source: GNTB/Claus Sager 2014

South East Asia shows great potential.

2.1 million trips to Europe are already being generated by the main markets.

<table>
<thead>
<tr>
<th></th>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>1st place</td>
<td>Argentina, 9,700,000</td>
<td>Argentina, 915,000</td>
<td>Argentina, 89,000</td>
</tr>
<tr>
<td>2nd place</td>
<td>Chile, 2,600,000</td>
<td>Chile, 338,000</td>
<td>Chile, 85,000</td>
</tr>
<tr>
<td>Total</td>
<td>12,300,000</td>
<td>1,253,000</td>
<td>174,000</td>
</tr>
</tbody>
</table>

Source: GNTB/World Travel Monitor, IPK 2017

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</tr>
</thead>
<tbody>
<tr>
<td>1st place</td>
<td>Indonesia, 7,900,000</td>
<td>Indonesia, 622,000</td>
<td>Indonesia, 110,000</td>
</tr>
<tr>
<td>2nd place</td>
<td>Singapore, 6,900,000</td>
<td>Singapore, 544,000</td>
<td>Thailand, 82,000</td>
</tr>
<tr>
<td>3rd place</td>
<td>Malaysia, 6,100,000</td>
<td>Malaysia, 528,000</td>
<td>Singapore, 75,000</td>
</tr>
<tr>
<td>4th place</td>
<td>Thailand, 4,400,000</td>
<td>Thailand, 449,000</td>
<td>Malaysia, 72,000</td>
</tr>
<tr>
<td>Total</td>
<td>25,300,000</td>
<td>2,143,000</td>
<td>339,000</td>
</tr>
</tbody>
</table>

Source: GNTB/World Travel Monitor, IPK 2017
By 2030 Germany’s inbound tourism industry could potentially reach **121.5 million overnight stays**.

Overall increase by 2030: **53.7 million overnight stays**
up by **80 per cent**

Europe will still be the **largest source region** for Germany’s inbound tourism industry in 2030, with a **73 per cent** share of all international overnight stays.