87.7 million overnight stays

7.0 million promotable business trips to Germany by Europeans

36.9 billion spent on travel to Germany by Europeans

33.5 million holiday trips by Europeans

121.5 million overnight stays possible by 2030

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

87.7 million international overnight stays in 2018

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1st place as a cultural travel destination for Europeans
Source: GNTB/WTM 2018

1st place worldwide as an international trade fair destination
Source: AUMA 2018

1st place in Europe as an international conference destination
Source: ICCA 2018

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

2nd place in Europe as a destination for international luxury travel
Source: GNTB/WTM 2018

1st place as a travel destination for young Europeans (aged 15 to 24)
Source: GNTB/WTM 2019

1st place on the demand side of 50 countries worldwide
Source: Anholt-GfK Roper Nation Brands Index 2018 report

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

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

3rd place as an economic power in a global comparison of 140 countries
Source: Global Competitiveness Report, World Economic Forum 2018
International tourism has risen to 1.4 billion arrivals worldwide in 2018.

Source: UNWTO, World Tourism Barometer, January 2019

The destination regions of the Middle East and Africa showed the highest rates of growth in 2018. International arrivals will increase by a further 3 to 4 per cent in 2019.

Global tourism is continually growing.
Global demand

+153% since 1993

Since 1993 the number of overnight stays by foreign visitors to Germany has risen by 53 million.

Total figures for each year include overnight stays from unspecified countries (around 1.8 million in 2018).
Most important source markets worldwide for Germany in 2018.

<table>
<thead>
<tr>
<th>Country</th>
<th>Rank</th>
<th>Source: GNTB/World Travel Monitor, IPK 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netherlands</td>
<td>1</td>
<td>The Netherlands remains the most important source market for Germany.</td>
</tr>
<tr>
<td>Switzerland</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td>3</td>
<td></td>
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<tr>
<td>UK</td>
<td>4</td>
<td></td>
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<tr>
<td>Austria</td>
<td>5</td>
<td></td>
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<tr>
<td>Italy</td>
<td>6</td>
<td></td>
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<tr>
<td>France</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>8</td>
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<td>Poland</td>
<td>9</td>
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<tr>
<td>Belgium</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>China</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

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

International overnight stays in 2018:

87.7 million

Source: Federal Statistical Office 2019
Promotable business trips to Germany by Europeans have the largest market share, with 7.0 million in 2018.

Total volume in 2018: 13.0 million trips (+0.6%)

46% traditional business trips (-3.7%)

16% trade fairs and exhibitions (-4.9%)

33% conferences/conventions (+6.7%)

54% promotable business trips (+4.5%)

Germany has a disproportionately large share of the international business travel market and is generating growing demand in the leisure sector.

Trips abroad by Europeans in 2018:

- Business trips: 12%
- Holidays: 75%
- Other private trips: 13%

Trips to Germany by Europeans in 2018:

- Business trips: 22%
- Holidays: 57%
- Other private trips: 21%
Cars and planes are the most important modes of transport for trips made by Europeans to Germany.

All trips from Europe to Germany in 2018: 59.0 million (+5.0%)

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Car</td>
<td>49%</td>
<td>+5.5%</td>
</tr>
<tr>
<td>Plane</td>
<td>32%</td>
<td>+4.3%</td>
</tr>
<tr>
<td>Coach</td>
<td>8%</td>
<td>-1.6%</td>
</tr>
<tr>
<td>Train</td>
<td>8%</td>
<td>+12.3%</td>
</tr>
<tr>
<td>Other*</td>
<td>3%</td>
<td>+1.0%</td>
</tr>
</tbody>
</table>

In 2018 travel expenditure** on trips to Germany by visitors from Europe came to €36.9 billion, an increase of 5.1 per cent on 2017.

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

Booking agent/channels for trips made by Europeans to Germany in 2018.

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

Share of bookings in 2018 (%)

- Internet: 84%
- Direct booking of accommodation: 27%
- Travel agency: 17%
- Direct booking of transport: 14%
- Other*: 11%
- Tourist information: 3%
As well as being a popular destination for holidays, Germany has an above-average share of the international business travel market.

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

In 2018 travel expenditure on trips from overseas* to Germany came to € 26.1 billion, up by 5 per cent on the previous year.
An increase of 4.5% in 2018

Overnight stays by foreign visitors to Germany in 2018 by federal state.
Germany’s major cities are particularly popular.

57% in destinations with over 100,000 inhabitants

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

20% in destinations with fewer than 10,000 inhabitants

Distribution of international overnight stays in German towns and cities by size in 2018.

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

3rd place for Germany as a destination for nature-based travel* among Europeans travelling worldwide.

30% growth (2005 – 2018) in overnight stays by foreign visitors in smaller towns and villages*** (up to 10,000 inhabitants)

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

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

International overnight stays could increase by 2030 by 80%

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.

1.4 million trips to Europe from Argentina and Chile alone.

Almost two million additional overnight stays* in Germany by 2030
*excluding camping; Source: GNTB/Claus Sager 2014

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South East Asia shows great potential.

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

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### Markets

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1st place</td>
<td>Argentina, 10,400,000</td>
<td>Argentina, 993,000</td>
<td>Argentina, 92,000</td>
</tr>
<tr>
<td>2nd place</td>
<td>Chile, 3,700,000</td>
<td>Chile, 444,000</td>
<td>Chile, 92,000</td>
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<tr>
<td>Total</td>
<td>14,100,000</td>
<td>1,437,000</td>
<td>184,000</td>
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### Markets

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<tbody>
<tr>
<td>1st place</td>
<td>Indonesia, 9,900,000</td>
<td>Indonesia, 704,000</td>
<td>Indonesia, 111,000</td>
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<tr>
<td>2nd place</td>
<td>Malaysia, 8,700,000</td>
<td>Malaysia, 620,000</td>
<td>Thailand, 96,000</td>
</tr>
<tr>
<td>3rd place</td>
<td>Singapore, 7,500,000</td>
<td>Thailand, 536,000</td>
<td>Singapore, 87,000</td>
</tr>
<tr>
<td>4th place</td>
<td>Thailand, 6,700,000</td>
<td>Singapore, 509,000</td>
<td>Malaysia, 83,000</td>
</tr>
<tr>
<td>Total</td>
<td>32,800,000</td>
<td>2,369,000</td>
<td>377,000</td>
</tr>
</tbody>
</table>

Source: GNTB/World Travel Monitor, IPK 2019
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.