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MAKING TOURISM **MORE** **SUSTAINABLE**

2024 PROGRESS REPORT



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INTERNATIONAL
MARKETING



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NETWORK AND
STAKEHOLDER MANAGEMENT

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BUSINESS INTELLIGENCE



Dr Christoph Ploß,
Member of the German Parliament
Federal Government Coordinator for the
Maritime Industry and for Tourism

Dear reader,

Global tourism remains on a growth course. According to research recently published by Boston Consulting Group, the annual volume of revenue generated worldwide from holidays and leisure travel could triple to US\$ 15 trillion by 2040.

Germany needs to be an attractive travel destination in order to be able to share in this potential growth. It is a declared aim of the country's new federal government to improve the general parameters for the tourism industry, for example through high-performance infrastructure and fewer conditions being imposed on the industry.

International travellers staying overnight in Germany already spend €77.7 billion every year according to analysis in IPK International's World Travel Monitor.

We aim to continue increasing the associated economic value added, especially for small and medium-sized enterprises (SMEs), such as those in the hotel and restaurant trade.

But international tourism is not only important for the economy, it plays an important role in society too. It promotes social interaction, including with other cultures, and enhances Germany's image as a place to do business and invest. There is also an environmental dimension to international travel.

With this in mind, we aim to create the conditions conducive to positioning Germany as an attractive destination and leveraging economic potential while keeping the environmental footprint of travel low.

“It is a declared aim of the country’s new federal government to improve the general parameters for the tourism industry, for example through high-performance infrastructure and fewer conditions being imposed on the industry.”

We will strengthen Germany’s appeal as a destination by expanding rail travel. In addition, the coalition agreement provides for a reduction in aviation tax in order to make flying to and from Germany more affordable. After all, the future growth of the travel industry will hinge on emerging markets in Asia, such as China, India and Saudi Arabia, from where Germany can only be reached by plane.

To tackle the goals set out in the coalition agreement, we – together with industry players – will focus on the competitiveness of the tourism industry during this legislative period. Germany’s already high standards in sustainability offer an advantage in this regard.

The German National Tourist Board has a key role to play. In this progress report, it documents what has already

been achieved and identifies strategic approaches for positioning Germany as an attractive, sustainable travel destination.

I trust you will find this progress report an informative and engaging read.

Dr Christoph Ploß

Dear reader,

The EU Corporate Sustainability Reporting Directive (CSRD) requires a large number of companies to report extensively on sustainability, including companies in the tourism industry. In addition to the impact of a company's own operations on the environment, those of its supply chains must also be examined. Increasingly, banks and investors require a transparent assessment of a business using environmental, social and governance (ESG) criteria, and customers are demanding more credibly sustainable products and services too.

This is the third time that the German National Tourist Board (GNTB) has published a progress report on sustainability. By doing so, it has laid the foundations to be able to meet the forthcoming regulatory requirements when they come into force. Simultaneously, it offers partners in the German travel industry a practical example of how to meet the reporting requirements that lie ahead.

For more than ten years, the GNTB has been committed to continually improving the balance between economic value creation and environmental and social responsibility.

This report presents the fruits of these efforts to position Destination Germany in the international market. It also highlights the global marketing activities of the GNTB and the sharing of knowledge in its network.

One of the GNTB's key organisational tasks last year was the introduction of the EMAS European environmental management system. Certification according to DIN EN ISO 14001:2015 is impressive testimony to the organisation's long-term and systematic commitment to sustainability. The experience gained from the implementation process will also serve the foreign representative offices well in the future.

The Board of Directors wholeheartedly supports the efforts of the Executive Board and the whole GNTB team to make inbound tourism to Germany fit for the future and even more sustainable. With best wishes for the onward journey.

Brigitte Goertz-Meissner





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

“Certification according to DIN EN ISO 14001:2015 is impressive testimony to the organisation’s long-term and systematic commitment to sustainability.”



Petra Hedorfer
Chief Executive Officer

Dear reader,

The economic importance of inbound tourism to Germany was demonstrated once again in 2024, with global spending by international travellers to Germany amounting to €77.7 billion according to IPK International – an increase of almost 9 per cent and striking testimony to the appeal of the Destination Germany brand.

The ‘Germany. Simply inspiring’ brand profile represents a high-quality, service-oriented travel destination in the market.

In line with the objectives of the German government set forth in the coalition agreement, the GNTB promotes forward-looking tourism that takes both economic and sustainability aspects into account while focusing on

acceptance of tourism, shaping the world we live in and digitalisation.

The targets agreed with the Federal Ministry for Economic Affairs and Energy include marketing Germany to the world as a sustainable and green travel destination while unlocking tourism’s economic potential for SMEs and for Germany’s regions, especially those that are structurally weak. The mission and objective are to embed climate action, environmental protection and directly people-focused aspects such as accessibility in inbound tourism too, including by raising awareness of this among service providers and travellers with the aim of making tourism more sustainable.

“Balancing the needs of the environment, the economy and society remains a core aspect of the GNTB’s marketing of Destination Germany on the international stage.”

This third edition of the ‘Making tourism more sustainable’ progress report presents the progress made in implementing regulatory requirements and positioning Germany as a sustainable and inclusive destination in the international market in the 2024/2025 season.

It addresses protection of the environment and combating climate change as well as the socio-cultural aspects of inclusion and accessibility, while also considering the possibilities offered by digital innovation.

The GNTB’s internal sustainability initiative reached another milestone in 2024 by achieving certification under the Eco-Management and Audit Scheme (EMAS).

Balancing the needs of the environment, the economy and society remains a key aspect of the GNTB’s marketing of Destination Germany on the international stage.

We look forward to continuing our dialogue with you.

Petra Hedorfer
Chief Executive Officer of the GNTB







Global challenge

Climate-friendly and socially responsible behaviour is becoming increasingly important in international tourism. Of the international travellers surveyed for the Sustainable Travel Report published by Booking.com in April 2024, three-quarters stated that they wanted to take a more sustainable approach to travel in the next twelve months. An attitude-behaviour gap remains nevertheless. This was highlighted in a survey by IPK International in September 2024, according to which just 31 per cent of European travellers to Germany actually booked certified sustainable products and services.

Besides an awareness of sustainability on the part of consumers, destination countries need the right infrastructure and product offerings for travel to become more sustainable. Germany is already well positioned in this respect. This is reflected in how Germany is perceived internationally by potential customers and in surveys.

In accordance with the objectives of the Federal Government, the GNTB continued to focus its strategic efforts in 2024 on raising awareness of the Destination Germany brand and on enhancing the brand profile as an attractive destination that offers excellent quality and a diverse, certified eco-friendly range of products and services for tourists.



Germany strengthens its position as a sustainable travel destination in the international market

At the global UN Sustainable Development Summit in New York in 2015, the UN General Assembly adopted Agenda 2030 with its 17 sustainable development goals (SDGs). These SDGs and their 169 targets see sustainability as sustainable development in respect of all relevant dimensions (the economy, the environment and society) and levels (national, regional and local).

In the SDG Index, which measures progress in reaching the UN's climate targets, Germany occupied fourth place out of 193 UN member states analysed in 2024, a position it successfully retained in 2025.

Progress made in achieving the SDGs

In 2024, the GNTB made achievement of the SDGs a cornerstone of its operations, measuring its progress towards strategic goals against this benchmark.



In 2024, huge improvements were confirmed under SDG 11 'Sustainable cities and communities', a goal that is particularly relevant to tourism.

According to the index, Germany made progress in eight of the 17 SDGs in 2024.



Source: SDG Index.

Anholt Nation Brands Index (NBI) confirms Germany's positive image

The Anholt Nation Brands Index (NBI) determines a country's brand value using six indicators: exports, governance, culture, people, tourism and immigration/investment, which in turn are made up of 23 locational factors. Germany maintained its overall ranking in second place among 50 of the world's leading economies that were surveyed in 2024, behind Japan and ahead of Italy. Germany came first among the 27 European countries in the survey.

2nd place once again for Germany among 50 of the world's leading economies that were surveyed.

In the NBI's sub-indices that are particularly relevant to having a reputation for sustainability, Germany ranked tenth for responsibility for protecting the environment.

Source: Anholt Nation Brands Index 2024.

GNTB Travel Industry Expert Panel confirms long-term rise in demand and a range of sustainable products that meet the needs of the market in Destination Germany

Every quarter, the GNTB asks executives and procurement heads of international tour operators running tours in Germany and online platforms about their current business situation and their expectations for the next six months. It summarises the results in a GNTB Travel Industry Expert Panel (TIEP) and makes them available to its members. It also canvasses on specific aspects of sustainability.

There was growing interest in sustainability among customers over the course of 2024. More than half of the decision-makers surveyed are currently seeing a change in booking patterns towards eco-friendly travel. Over the next three years, 63 per cent of the experts expect a moderate shift in demand towards sustainability, with 14 per cent expecting a big or very big shift.

On average, the rounds of interviews in 2024 reflected a consistently high level of interest in Germany as a travel destination with sustainable products and services.

35 per cent of products and services in the surveyed tour operators' product portfolios for travel to Germany are sustainable.

23 per cent of the sustainable products and services are certified by independent organisations, such as Green Globe, Biohotels, Green Key or EU Ecolabel.

78 per cent of tour operators consider Germany a sustainable destination, with 57 per cent specifically focusing on this aspect in their marketing.

Source: GNTB Travel Industry Expert Panel Q1 2025.

Potential visitors rank Germany very highly in the market for sustainable travel destinations

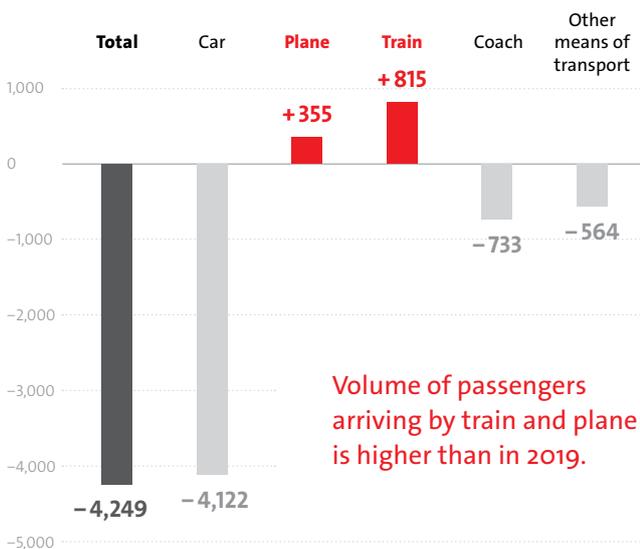
A special World Travel Monitor analysis carried out by IPK International on behalf of the GNTB in September 2024 investigated how well Germany is perceived as a sustainable travel destination in ten European source markets.

Positive trend in the chosen modes of transport

In its international marketing, the GNTB promotes the use of sustainable travel for travelling to and around Germany.

From an economic perspective, overseas visitors are particularly important for inbound tourism to Germany due to their higher-than-average travel expenditure. Naturally, they travel by plane. However, the supply of air travel is failing to keep up with demand. According to IPK International, airline seat capacity in 2024 continued to be around 20 per cent lower than in 2019.

NUMBER OF PASSENGERS TRAVELLING TO GERMANY – 2019 VS. 2024



Volume of passengers arriving by train and plane is higher than in 2019.

Expressed in thousands of passenger arrivals.

Source: World Travel Monitor®, 2019–2024, IPK International.

RANKING OF TRAVEL DESTINATIONS in terms of climate action and environmental protection/sustainability



Source: WTM/IPK 2024.

RANKING OF TOURISM SERVICES

Germany's tourism services were rated highly in all categories (1 = poor; 2 = average; 3 = good).



2.49

Perception of Germany



2.54

Getting there



2.46

Getting around (public transport/bike)



2.51

Hotels/accommodation



2.45

Food and drink



2.47

Tourism-related activities

Source: WTM/IPK 2024.

In terms of sustainable travel, German rail provider Deutsche Bahn is a key partner for the GNTB. We also have a long history partnering with Austrian Federal Railways, with Rheinalp (marketing alliance between Deutsche Bahn and Swiss Federal Railways in the Swiss market) and with the French rail operator SNCF.

BREAKDOWN BY MODE OF TRANSPORT FOR TRAVEL TO GERMANY

	Europe	France	Austria	Switzerland
Plane	41%	43%	40%	20%
Car	43%	38%	33%	51%
Train	15%	19%	27%	29%

Source: Terralytics, 33 European countries

Long-term cooperation campaigns in France, Austria and Switzerland are significantly growing Deutsche Bahn's market share.

Rapid growth in business travel segment

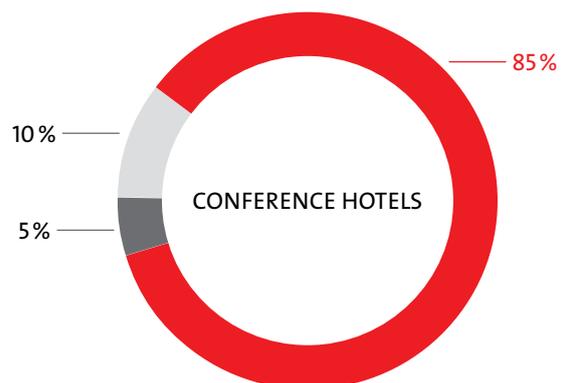
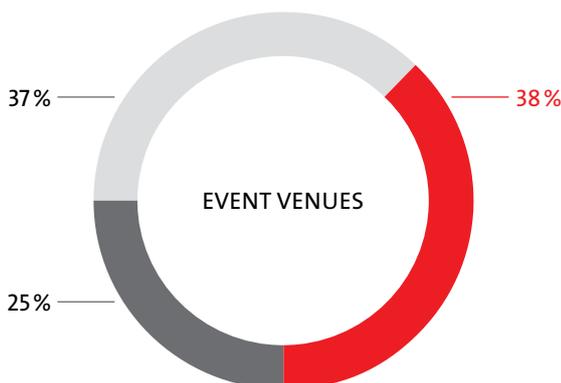
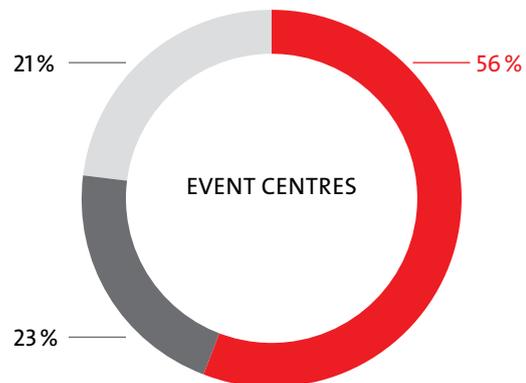
Growing awareness of sustainability among organisers of meetings, incentives, conferences and events (MICE) coupled with the regulatory requirements for companies within the EU impacted the rapid growth of certified MICE offerings in Germany once again in 2024. According to the Meetings and Events barometer of the German

Convention Bureau (GCB), the GNTB, the European Association of Event Centres (EVVC) and the European Institute for the Meetings Industry (EITW), the proportion of providers that are now certified as sustainable rose from 54 per cent to 60 per cent in 2024, led by conference hotels.

HAS YOUR COMPANY ADOPTED A SUSTAINABILITY STANDARD?

- Yes
- Not yet but we are planning to
- No, and we do not have any plans to do so

Source: Meetings and Events Barometer 2024.







International marketing

The interplay of economic, environmental and social aspects is a key factor in designing global, theme-based advertising campaigns. The GNTB has been championing sustainable travel information and services in its international marketing of Destination Germany for over a decade. Using internationally recognised certification, a campaign has been running since 2020 to advertise environmentally friendly and responsible ways to discover Germany as a travel destination. Numerous market-specific activities build bridges between specific tourism products and services in Germany and customer demand from the relevant source market.

SIMPLY
FEEL
GOOD

Sustainable experiences
in Germany



2024 GNTB sustainability campaign 'Simply Feel Good'

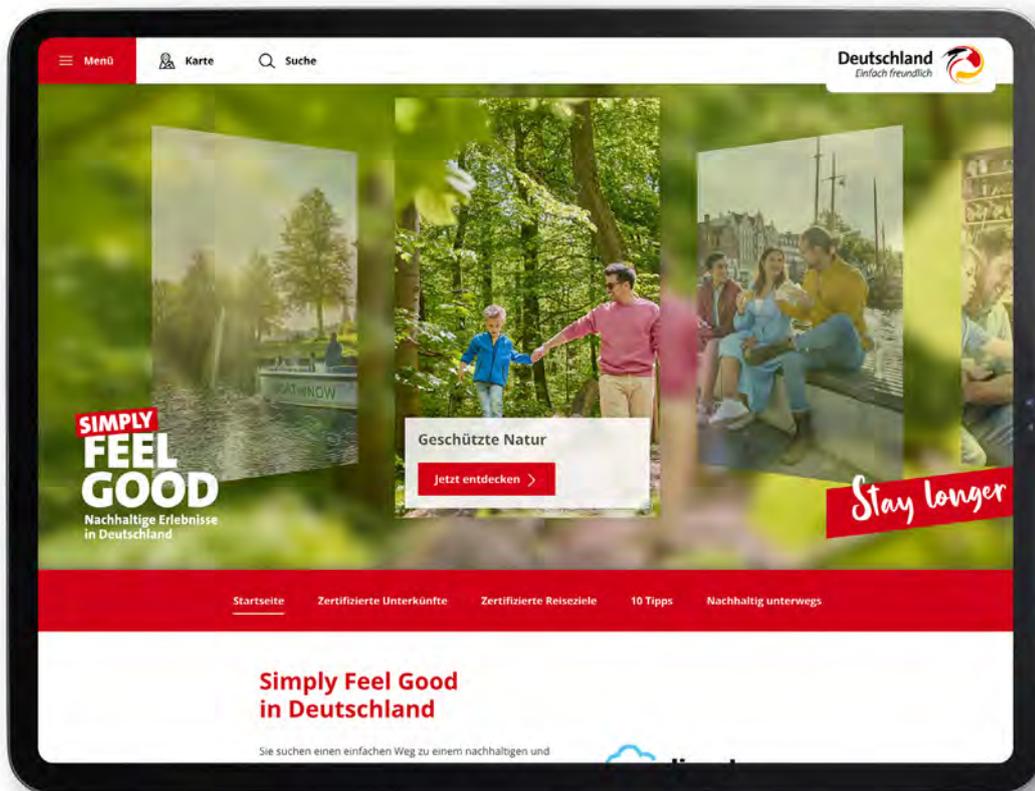
Findings by IPK International and the results of the GNTB Travel Industry Expert Panel (see page 13) show that on a global level, more travellers were interested in social and environmental responsibility when travelling in 2024. The GNTB has been using this growth in interest among consumers and partners in the international travel industry to highlight sustainable tourism products and services in Germany as part of a marketing campaign entitled 'Feel Good'. This campaign has been running since 2020 and is updated and refined annually.

STRATEGIC AIMS

- Improved visibility of sustainable products and services
- Straightforward communication of sustainable tourism products
- Targeted advertising of a selection of high-quality certified destinations, cities, regions, experiences and specific offers

ACTIVITIES

The main focus of the campaign is the landing page www.germany.travel/feelgood. Key elements include the interactive map, through which over 1,500 accommodation providers with recognised sustainability certificates can be contacted directly. There is also a multi-lingual carbon calculator provided by myclimate, along with links to ways to offset the emissions.



Microsite
www.germany.travel/feelgood

KEY PERFORMANCE INDICATORS FOR THE CAMPAIGN

64
million impressions

via Facebook, Instagram and YouTube

32
million impressions

through programmatic marketing

1
million page views

on germany.travel

23
million impressions

via the Google Display Network

2.13
billion contacts

through 278 PR initiatives – 708 publications

158
thousand contacts

through email marketing

Cultureland Germany



2024 GNTB campaign 'Cultureland Germany'

In its global Cultureland Germany inspiration campaign, the GNTB presented Germany as a travel destination offering sustainable travel experiences in a cultural context in 2024. Aspects such as the integration of rural regions into cultural tourism, climate-neutral travel and extending the length of stay in order to reduce carbon emissions were incorporated into marketing activities.

STRATEGIC AIMS

- Global positioning of Cultureland Germany and its sustainable tourism
- Extend visitors' length of stay by including rural regions and their range of cultural attractions, landscapes and heritage

ACTIVITIES

The global inspiration campaign presented around 80 culturally significant points of interest throughout Germany on the campaign microsite, grouping them into four themes: art, design, music and wine. A map with links to the event listings of the regional tourism organisations also signposted current reasons to travel. The microsite was advertised in an omnichannel campaign on a global and local level.



Social media images for the wine, art and design themes

KEY PERFORMANCE INDICATORS FOR THE CAMPAIGN

145.5
million impressions

via Facebook, Instagram and YouTube

32
million impressions

through programmatic marketing

685
thousand page views

on the campaign microsite

17.9
million impressions

via the Google Display Network

3.21
billion contacts

through 291 PR initiatives – 766 publications

210
thousand contacts

through email marketing



54

UNESCO WORLD
HERITAGE SITES

Historic.Modern.Germany.

2024 GNTB campaign '54 UNESCO World Heritage Sites – Historic.Modern.Germany.'

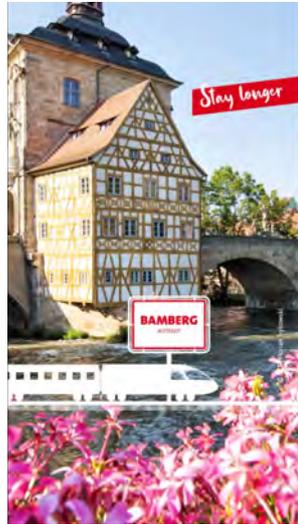
Germany's 54 UNESCO World Heritage sites (as of 2024) are synonymous with a rich cultural heritage, historic preservation and the observance of customs and traditions in a sustainable way. They provide the link to European history. The GNTB, together with its member the UNESCO World Heritage Sites Association, draws on these qualities to further enhance Germany's brand image in targeted marketing campaigns as a leading destination for cultural travel. Since July 2025, there have been 55 UNESCO World Heritage sites in Germany.

STRATEGIC AIMS

- Create individual, tailored experiences for international visitors using a variety of themed UNESCO routes
- With slow travel in mind, link World Heritage sites with natural beauty spots in the local countryside
- Promote staying longer and travelling sustainably in an appealing way

ACTIVITIES

Eight themed routes formed the central element of the campaign, which combined a visit to the UNESCO World Heritage sites with suggestions for eco-friendly excursions in the area to create multi-day holiday experiences. The routes were devised with the UNESCO World Heritage Sites Association and based around the use of public transport. The cross-media campaign was run through social media marketing, search engine advertising, programmatic marketing and newsletters, and was complemented by market-specific initiatives.



Social media images of the UNESCO routes

KEY PERFORMANCE INDICATORS FOR THE CAMPAIGN

177
million impressions

via Facebook, Instagram
and YouTube

77.5
million impressions

through programmatic
marketing

961
thousand page views

on the campaign
microsite

54.7
million impressions

via the Google
Display Network

4.93
billion contacts

through 313 PR initiatives –
621 publications

382
thousand contacts

through email
marketing

2024 GNTB campaign 'Stay a little bit longer'

Switch off in nature, discover customs and traditions and take the time to enjoy Destination Germany: in its global Stay a little bit longer campaign, the GNTB advocated for extending trips to Germany with the aim of reducing the carbon footprint per day of holiday.

Besides integrating the idea into global GNTB campaigns, the foreign representative offices initiated many local

marketing measures. Trade partners were made aware of suitable offerings in sales calls and media representatives were informed during one-on-one meetings and individual press tours. Online campaigns, out-of-home advertising, and special events were aimed at inspiring potential visitors to Germany to stay longer.

EXAMPLES OF MARKET-SPECIFIC SUSTAINABILITY CAMPAIGNS IN 2024



OOH campaign at Zurich's main train station
Multimedia experience on a 30-metre-long 'Stay longer' bench complete with 8D sounds and VR, 6–8 September 2024.

Video mapping on the parliament building in Bucharest
Spectacular projections as part of the iMap Festival – accompanied by a PR event, OOH initiatives and a video advertising campaign at metro stations, cinemas and the Cocor shopping mall – displayed around four million times, September–October 2024.





OOH campaign at Waterloo station

Eye-catching anamorphic 3D advertising on Waterloo Motion, Europe’s largest indoor advertising screen – interactive elements based on eye tracking and gesture control, 7–20 August 2024.

Market	Dates in 2024	Activity	Content
Belgium/Netherlands	March–June	OOH hologram campaign	3D animation of the ‘Stay longer’ video clip on screens and an augmented reality experience at seven busy train stations – related competition, social media campaign and advertising for sustainable products and services – over 1.8 million interactions
Spain/France	September–November	Immersive exhibition	Five UNESCO World Heritage routes were brought alive with projections and sound – controlled interactively by visitors – accompanying digital campaign, landing page and competition – around 10,000 visitors to the exhibition and 240,000 passers-by
Denmark	October–December	Workation campaign	Promoting business travel combined with leisure on social and topic-specific media – landing page – supplemented by product placements and events in co-working spaces
USA/Canada	August–December	OTA campaign with Hopper	Exclusive cooperation – two trees are planted per booking – mobile games in the app – reach of 165 million
GCC	June–November	Campaign on Spotify	Stay longer song with two audio elements in Arabic and one in English – 2.6 million impressions
India	October–November	Cross-channel influencer campaign	Microsite with information on travel routes – accompanied by a ‘live like a local’ influencer campaign – approx. five million visits to the microsite

REACH OF SUSTAINABILITY-RELATED PR ACTIVITIES

1.05
billion contacts

385
publications

253
activities

UEFA EURO 2024 GNTB campaign

Based on a cooperation agreement with UEFA Euro GmbH and working closely with the regional tourism organisations and the ten German host cities, the GNTB began promoting the stand-out event of summer 2024 ahead of time in order to use its sporting appeal to position Germany as a travel destination.

STRATEGIC AIMS

- Highlight the host nation's commitment to organising a green European Football Championship, thereby showcasing Germany as a sustainable destination
- Encourage ticket holders and other fans to stay longer in Germany
- Motivate potential visitors to undertake trips beyond the city into the surrounding countryside
- Strengthen Germany's image as a welcoming and service-driven destination in order to inspire travellers to make repeat trips to Germany

ACTIVITIES

- Dedicated microsite at germany.travel
- Presentation at international events, such as the ITB and the GTM
- Press conferences/PR events worldwide
 - Information on host cities
 - Tips for day trips in the surrounding areas
 - Engaging content on Germany's fan culture and warm welcome

CAMPAIGN KPIS

1.6
million

additional
overnight stays

€7.4
billion

economic value
added*

3.5
nights

was the average length
of stay for international
ticket holders*

97
per cent

of ticket holders want to
visit Germany again*

€571
million

advertising value*

Perception of Germany
as a host country
according to the NBI:
ideal host, great atmosphere, warm welcome, safe and sustainable event

*Source: Nielsen Sports.

International railway campaigns

Using green transport to travel to Germany from neighbouring European markets can play a significant role in making tourism more sustainable. For several years, the GNTB has spearheaded campaigns for sustainable transport together with Deutsche Bahn and other European rail companies. Those campaigns were continued and expanded in 2024.

RheinAlp collaboration, digital out-of-home placements at Zurich's main train station



Cooperation projects with Deutsche Bahn

Market	Activity	Reach
UK, Italy and Spain	Germany by Train campaign – promoting rural regions with a focus on sustainable travel: Deutsche Bahn’s involvement as a Premium Partner in the macro-regional influencer campaign with three influencers from three markets – played on GNTB and influencer channels using a number of social media platforms including Instagram, YouTube, Facebook, X, TikTok; July–September 2024	Overall result for the GNTB campaign and influencer channels: 11 million views 27.6 million impressions
Cross-market	GTM Premium Partner collaboration Communication and advertising measures as part of the Premium Partner package – workshop presentation, B2B networking and press activities	333 participants: thereof 224 international buyers, 109 journalists

Examples of international railway campaigns

Market	Activity	Reach
Macro-regional campaigns in Spain, the UK and Italy	Social media campaign #GermanybyTrain with Deutsche Bahn Influencer campaign on Instagram and TikTok – paid campaign on YouTube and Instagram	
Austria	Austrian Federal Railways/Deutsche Bahn marketing collaboration – high-reach out-of-home campaign in Vienna, Linz and Innsbruck Content hub on GNTB’s Sparschiene microsite – advertising through online and social ad campaigns – accompanying social media campaigns on Facebook, Instagram and Pinterest – feature on oebb.at	Around 123.5 million contacts Around 195,450 page impressions on GNTB’s microsite Around 7.3 million page impressions on oebb.at
Switzerland	Rheinalp collaboration – cross-media campaign 360° communication through high-reach online channels – social media and digital out-of-home placements, including placements on the social media channels of the GNTB and Swiss Federal Railways – campaign video integrating all partners and featured on the campaign website and in various media placements	98 DOOH screens with more than 858,700 playouts 11.6 million ad impressions via display ads 5.3 million impressions via social media advertising 3.0 million views via video advertising
Czech Republic	České dráhy collaboration – cross-media campaign in cooperation with Czech Railways Online campaign with ‘Rajzujeme’ microsite – social media advertising through influencer trips – OOH campaign on international Czech Railways trains	49,973 clicks on the campaign microsite 80,470 views on Instagram Reels
Sweden	Snälltåget AB/SJ AB collaboration – cross-media initiatives as part of the Feel Good campaign TV advertising in western and south-eastern Sweden – out-of-home campaign at Swedish train stations – social media campaign in cooperation with Sweden’s leading Facebook group for rail travel – participation in the Vagabond rail travel day at Stockholm’s train station (pop-up event) with digital and VR elements	Around 7.3 million contacts Reach of around 247,200 million via TV advertising
France	SNCF/Deutsche Bahn collaboration Campaign microsite showcasing rail connections to Germany – social media ads – native advertising campaign with real-time bidding	Around 26.5 million ad impressions via display ads Around 250,500 clicks



TOGETHER WE CARE

SUSTAINABLE DEVELOPMENT GOALS

1 NO POVERTY	2 ZERO HUNGER	3 GOOD HEALTH AND WELL-BEING	4 QUALITY EDUCATION	5 GENDER EQUALITY
6 CLEAN WATER AND SANITATION	7 AFFORDABLE AND CLEAN ENERGY	8 DECENT WORK AND ECONOMIC GROWTH	9 INDUSTRY, INNOVATION AND INFRASTRUCTURE	10 REDUCED INEQUALITIES
12 RESPONSIBLE CONSUMPTION AND PRODUCTION	13 CLIMATE ACTION	14 LIFE BELOW WATER	15 LIFE ON LAND	16 PEACE, JUSTICE AND STRONG INSTITUTIONS
17 PARTNERSHIPS FOR THE GOALS				

www.germany.travel/making_tourism_more_sustainable

Germany

Lufthansa

A man in a dark suit is sitting on a black stool at a white desk, working on a laptop. The desk is part of a red and white exhibition stand. There are water bottles and glasses on the desk. A small model of a Lufthansa aircraft is on the desk.





Sharing knowledge

The GNTB uses its business intelligence tool set and the local presence of 19 international branches to closely monitor global travel trends and market-specific developments. It draws on the resulting insights to create marketing strategies that link business success with responsible behaviour.

The GNTB shares its business intelligence in a variety of online and offline formats with its partners in inbound tourism to Germany and the international travel industry, and with its global online travel platform partners.

Technological innovations that are shaping the entire tourism value chain in the course of digitalisation – for example virtual travel experiences as inspiration for real trips to Germany or machine-readable open data as the basis for AI applications that help to optimise visitor flows – play a special role in this context.

The GNTB shares expertise in its national and international network



New data facilitates targeted research on sustainable travel patterns

Successful marketing strategies aimed at meeting sustainability expectations require nuanced base data on market-specific travel patterns and on customers' willingness to book sustainable products.

The GNTB Sustainable Travel Trends to Germany dashboard, which was published for the first time in 2023, was supplemented in 2024 by a monthly analysis of total length of stay by market and by air arrivals. The proportion of tours through Germany and Europe

can also be analysed for each market. A calculation of the emissions for the travel to Germany was also integrated.

In 2024, the GNTB also began displaying metrics for the business travel market in a separate dashboard. The GNTB is thereby creating a robust basis for business decisions – both for its own marketing activities and for those of its partners and stakeholders, to whom it provides this data.

In 2024, the GNTB integrated new market research tools for the precise analysis of how people use search engines. The evaluated data from Google helps to further refine the running of campaigns through

- data-driven analysis of regional searches for hotels in Germany (broken down by country of origin of the tourists);
- data-driven analysis of search times (broken down by week and working day).



INBOUND TRAVEL TRENDS GERMANY

The Inbound Travel Trends to Germany data dashboard provides a fast and efficient overview of relevant, incoming-related data sources for

- arrivals by air and overland;
- sales of train tickets and other tourism spend;
- hotel occupancy and prices;
- overnight stays by holiday region;
- travel patterns.



SUSTAINABLE TRAVEL TRENDS TO GERMANY

The Sustainable Travel Trends to Germany data dashboard provides users with detailed information from three perspectives:

- The general attitude of consumers 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
- Actual travel patterns from a sustainability perspective



BUSINESS TRAVEL TRENDS TO GERMANY

The Business Travel Trends to Germany data dashboard shines a light on business travel to Germany in terms of sustainability.

The economic aspects

- arrivals
- spending

are placed in the context of the following sustainability aspects:

- seasonality
- multi-destination tours
- length of stay.



GNTB steps up its use of digital instruments

Open Data project: GNTB Knowledge Graph provides new insights into green travel

The commitment to sustainable tourism is in many ways inextricably linked with the digital transformation that is shaping tourism along its entire value chain and is another core focus of the GNTB. Digital tools and AI-assisted applications – from inspiration and booking to digital services such as mobile payments and virtual guides – are the norm, especially in the key growth markets in which the GNTB operates.

The GNTB is actively driving the use of new technology and artificial intelligence to ensure that tourism offerings are visible on global sales platforms. To this end, it coordinates the German tourism industry's Open Data project and the development of the Knowledge Graph to strengthen Germany's presence on AI-based platforms.

The data for the Knowledge Graph is compiled from various data silos, semantically structured and made machine-readable. Registered data users include companies, destinations, associations, public bodies and universities.

Data from the Knowledge Graphs can be used for the intelligent management of visitor flows. This allows traffic to be diverted away from congested areas and frees up transport routes, thereby helping to avoid carbon emissions.

The Knowledge Graph provides technological infrastructure and ensures that small and medium-sized market players can benefit from the potential for innovation and growth in a highly digital marketplace.

GNTB UNESCO app – a climate-friendly, accessible and inclusive way to discover the world

Immersive technologies like virtual reality (VR) and augmented reality (AR) offer new ways of presenting the real world in the digital sphere. In tourism, they are particularly useful for presenting travel destinations and attractions in a realistic manner in order to engage and inspire potential travellers. Mixed reality (MR) is an emerging technology that allows an interactive digital app to be integrated into the user's physical world. It means that even when they are still deciding where to go, users can discover places in the virtual realm and then plan their trip in the real world. Immersive technologies can also help tourists find their way around while travelling and can enhance their experience.

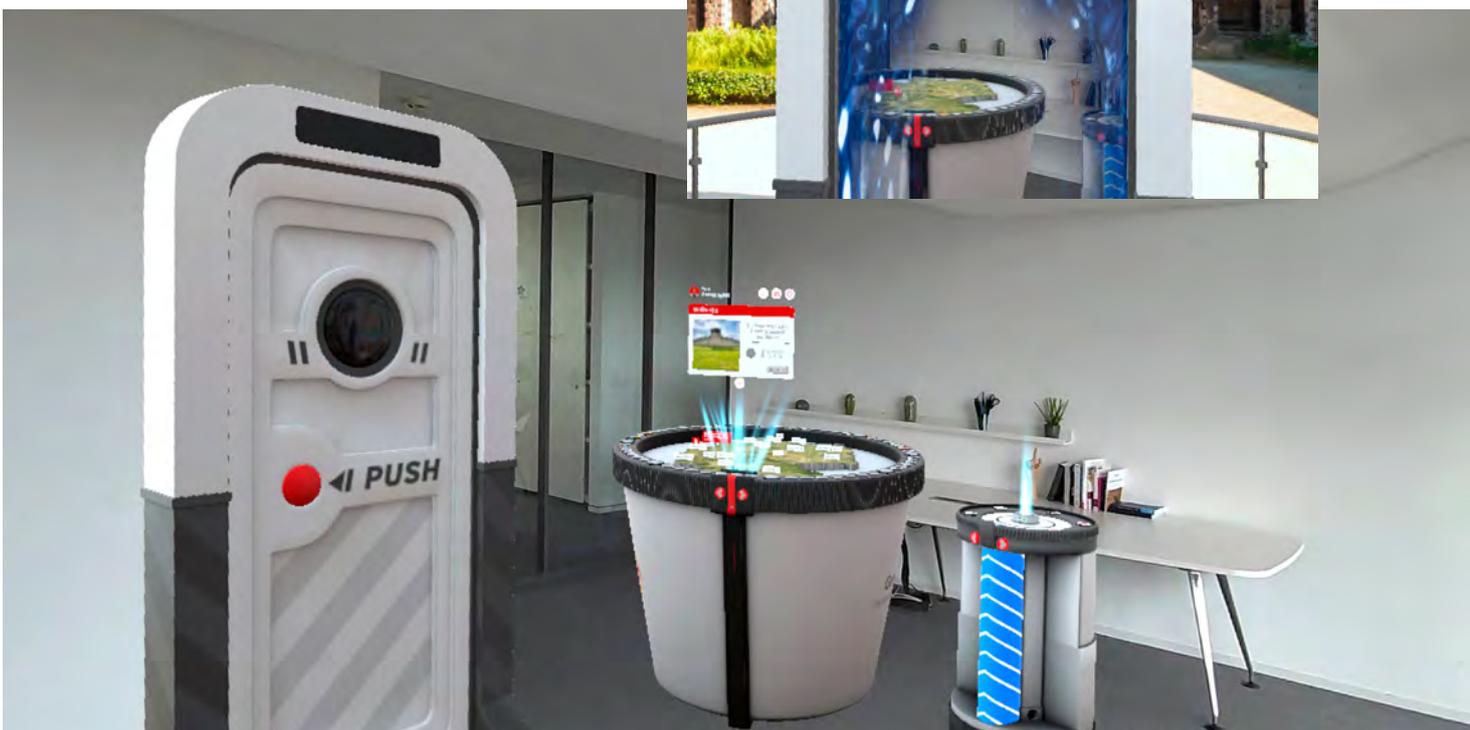
With its new mixed reality app, the GNTB created an innovative way in 2024 of experiencing the cultural and natural diversity of Destination Germany in a showcase of the country's 54 UNESCO World Heritage sites. The app also allows multiple people to come together virtually and to get to know the UNESCO World Heritage sites together.

The app was designed for the latest generation of virtual reality headsets (Meta Quest 3). The GNTB uses the app at events with trade partners, media representatives, stakeholders and consumers in Germany and abroad. Users who have a virtual reality headset can download the app for free from the Meta app store.

With inclusion in mind, an important criterion for the design of the app was accessibility and creating experiences for all. The app was designed in collaboration with a sheltered workshop and meets legal requirements concerning accessibility in digital communication, such as the German Act on Equal Opportunities of Persons with Disabilities (BGG) and the Federal Ordinance on Barrier-Free Information Technology (BITV).

For example, the app accommodates different standing or sitting heights of users to enable wheelchair users, seated people (e.g. seniors) and children to participate without difficulty. Text can optionally be read aloud or enlarged, and colour vision deficiencies are also catered for.

Using immersive technologies like virtual and mixed reality, the GNTB is creating innovative new ways of exploring Germany as a travel destination.



GNTB event and travel management in practice

The GNTB is bringing partners in Germany's inbound tourism industry together with the international travel industry through workshops, roadshows, seminars and PR events. It informs this network about the latest tourism products and services and raises the profile of Destination Germany in the market.

The GNTB actively uses the possibilities created by digital communication in order to offer online or hybrid events, which reduces the greenhouse gas emissions generated by participants travelling to them while increasing the reach of such events.

In 2024, 17 market-specific webinars were held for 1,114 participants. The Accessible Tourism Day was held as an in-person event during the ITB at the exhibition venue itself, and participants from around the world were able to follow the event live online.

In order to improve the sustainability credentials of the GNTB's face-to-face events in a pinpointed manner,

the GNTB developed an evaluation matrix back in 2022, which sets out detailed recommendations for event design and delivery.

The use of a balanced scorecard ensures that a valid evaluation is made. Factors taken into consideration include the use of certified hotels/venues, catering that features seasonal/regional produce, initiatives to avoid food waste, and the carbon footprint.

BALANCED SCORECARD RESULTS

Year	No. of events scored	Score
2023	90	88.63
2024	103	88.89

More extensive analysis of GNTB events in 2024 and consistently high scores.

(Source: GNTB)

Best practice: Germany Travel Mart™ run as a green conference

Since 2012, the GNTB has run the annual GTM Germany Travel Mart™ – its largest sales event – as a green conference. The 2024 GTM in Chemnitz, which was the 50th such event, was intended to showcase the event's evolution as a model for sustainable event management.

The GNTB commissioned the experts from Green Game to carry out accompanying sustainability measures, calculate the carbon footprint and realise potential for optimisation.

In 2024, systematic documentation management laid the foundations for obtaining Blue Angel certification for the GTM.



SUSTAINABLE EVENT MANAGEMENT MEASURES

based on the areas of action / materiality assessment under ISO 20121

BEFORE

Identification of measures and implementation

- Systematic overview and identification of measures based on areas of action and defined targets/KPIs
- Development of sustainability measures
- Implementation of the measures in close consultation with stakeholders/on-site workers
- Refinement of sustainability communication
- Definition of (long-term) documentation structure for the sustainability measures

DURING

On-site analysis

- Event interviews (with exhibitors, participants, journalists and staff)
- Tracking of the measures: monitoring and photographic documentation

AFTER

Analysis and evaluation

- Evaluation of interviews and analysis of on-site observations
- Evaluation of carbon footprint questionnaire and calculation of carbon footprint
- Interpretation of the results
- Identification of potential for improvement and refinement

Source: Green Game.

For the as-is analysis, data was gathered from site visits, photo documentation and on-site interviews with participants, exhibitors and staff.

The defined areas of action comprised catering, accessibility, trade fair stands/furniture/furnishings, technology/advertising production & entertainment, office & event management, travel & logistics, print/giveaways/staff equipment, event venues, and communication & participant management.

For all areas of action, detailed positive aspects and criticisms were identified and recommendations for the 2025 GTM were drawn up.

The GNTB calculated the carbon emissions for the GTM back in 2023 in order to identify the categories with the highest emissions and create a solid basis for analysing the carbon footprint over time.

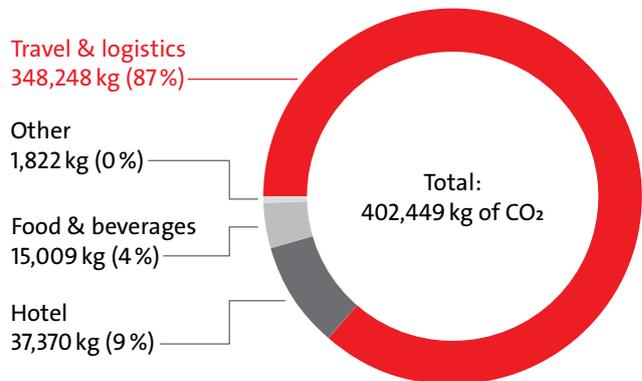
GTM accessible pre-convention tour

The GNTB organised an accessible group press tour as one of the pre-convention tours ahead of the Germany Travel Mart.

On this tour, ten international journalists travelled around northern Hessen, taking in the spa resort of Bad Wildungen, Kellerwald-Edersee National Park and Wilhelmshöhe Park, a UNESCO World Heritage site.

9 million contacts
generated through ten publications

2024 GTM CARBON FOOTPRINT



Source: Green Game.

COMPARISON OF THE 2023 & 2024 GTM CARBON FOOTPRINT

	2023 GTM CO ₂	2024 GTM CO ₂
Project management	55,206 kg	23,567 kg
Guest management	368,369 kg	338,212 kg
Pre-convention tours	13,546 kg	12,275 kg
Press tours	2,708 kg	1,491 kg
Live experience tours	1,357 kg	1,134 kg
Opening event	10,471 kg	6,571 kg
Host event	6,016 kg	8,128 kg
Workshop	11,456 kg	9,320 kg
Press conference	1,627 kg	1,373 kg
Content production	460 kg	378 kg
Total	471,217 kg	402,449 kg

Emissions were reduced significantly in almost all areas of action.

Source: Green Game.



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

Organisation of GNTB fact-finding and influencer tours focused on sustainability and inclusion

Through fact-finding tours for trade partners, media representatives and social media influencers, the GNTB once again conveyed up-to-date information and authentic personal impressions of the high standards of Germany as a sustainable travel destination in 2024.

Sustainability was kept firmly in mind when designing the GNTB fact-finding tours, as exemplified by the selection of certified hotels, the inclusion of rural areas in the itinerary and the use of green transport.

A total of 15 fact-finding tours (including two tours for international buyers and 13 press tours) were related to the Feel Good sustainability campaign in terms of content, eight of which in combination with the UNESCO campaign.

Besides the accessible pre-convention tour ahead of the GTM, the GNTB also organised a group press tour on the subject of accessible tourism in Germany. The itinerary included experiences in the great outdoors in the Volcanic Eifel and in Hunsrück National Park, wine culture

in Traben-Trarbach on the Moselle river and cultural history in Trier's old quarter.

As with the content of the fact-finding tours, the GNTB also registered measurable success in terms of the organisation of the tours. Participants from neighbouring European countries largely avoided arriving by plane. Within Germany, public transport (train or local public transport) was used wherever possible.

CARBON FOOTPRINT OF THE GTM PRE-CONVENTION TOURS

Year	Tours	kg of CO ₂	kg of CO ₂ per tour
2023	140	597,091	4,264.94
2024	141	527,362	3,740.16

Considerable improvement in the carbon footprint of fact-finding tours.

Source: GNTB.

KPIs OF GNTB FACT-FINDING AND INFLUENCER TOURS IN 2024

540
participants

Journalists, influencers and buyers

1.3
billion contacts (reach)

Publications by more than 400 journalists

97
million impressions

Posts from 80 influencers

Themed GNTB sustainability events

Sustainable Tourism Day

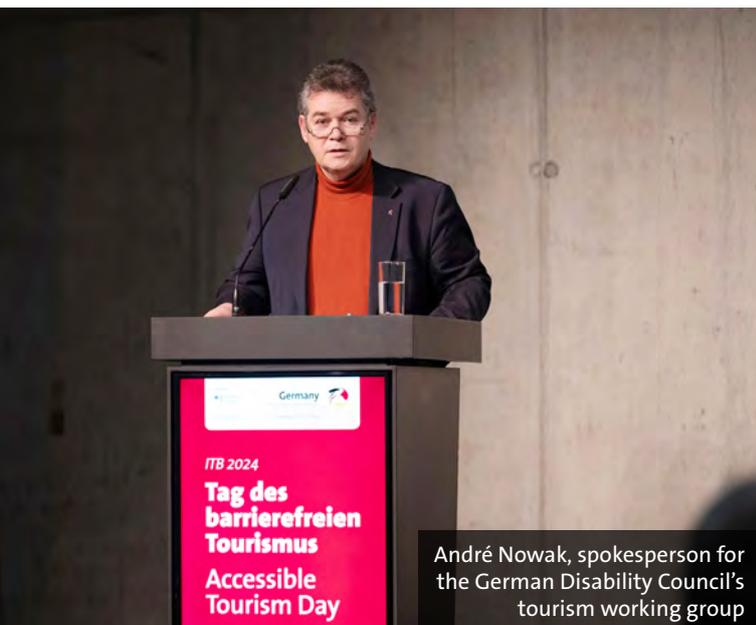
The GNTB created the Sustainable Tourism Day in 2022 as a platform for all players in Germany's inbound tourism industry. It is an opportunity for networking with experts, sharing successful solutions and developing further sustainability initiatives.

The GNTB hosted the third iteration of the Sustainable Tourism Day for members, partners and interested parties in Frankfurt am Main on 25 September 2024. Experts from the industry and academia met with policymakers to discuss strategies, solutions and examples of best practice for making Germany's inbound tourism even more sustainable.

70
participants

15
speakers

72%
satisfaction



German Tourism Award

In 2024, the GNTB was once again a member of the judging panel for the German Tourism Awards of the German Tourism Association (DTV). The awards recognise innovative projects that have been launched on the market and can act as model cases for tourism to Germany. Through its seat on the panel, the GNTB is able to promote the development and marketing of innovative and sustainable products and services in tourism to Germany.

The set of criteria is split into 40 per cent innovation and 20 per cent each for the three pillars of sustainability: the economy, the environment and society.

Accessible Tourism Day

The Accessible Tourism Day initiated by the GNTB is an established platform for bringing together decision-makers in government and the tourism industry, trade associations and interest groups to discuss the opportunities and challenges presented by accessible products and services, and to highlight successful examples of inclusion in tourism.

The GNTB held the twelfth Accessible Tourism Day on 6 March 2024. It was organised as an in-person event during the ITB and was also streamed.

Key topics were destination development and targeted product design to create accessible travel experiences, knowledge-sharing on accessibility in academia and the tourism industry, accessibility in digital media and the use of simple language in communication.

Participants were in agreement that accessible products and services can only be successfully developed for destinations in collaboration with service providers along the tourism service chain. That is also the way to leverage economic potential.

350
participants

19
speakers

82%
satisfaction





Internal measures

As a business, the GNTB is responsible for measurably improving its own environmental performance in line with regulatory requirements at EU level and the objectives of the German government.

All workflows at head office and the foreign representative offices are reviewed and analysed on an ongoing basis in terms of how they strike a balance between profitability, social responsibility and environmental aspects. In this way, the GNTB also serves as a role model for its network of partners in Germany's inbound tourism industry and in the international travel industry.

A central element of its efforts in 2024 was the scheduled implementation of the EMAS European environmental management system.

Collating all the data recorded and analysed in the course of this project for the first time also creates a solid basis for presenting the measurable improvements in environmental performance demanded by the Corporate Sustainability Reporting Directive.

An organisation that leads by example

Cutting energy consumption and the associated emissions

At GNTB head office, lighting and electrical equipment – including the IT – have been powered exclusively by green electricity since 2017. Steady headcount and a similar number of days in the office meant that energy consumption between 2020 and 2022 remained virtually unchanged at around 180,000 kWh per annum. In 2023, the use of energy-efficient equipment and awareness-raising among employees brought about a reduction in electricity consumption. IT equipment and kitchen appliances that no longer worked were replaced by more energy-efficient equipment.

Rising energy needs for IT applications play a huge role in energy consumption. The GNTB's data centre is powered by green electricity. When cloud services are set up, preference is given to providers that use renewable energy, while also taking account of contract length and market supply in addition to financial criteria.

Another source of energy that the GNTB uses is gas for heating offices. In absolute terms, gas consumption rose year on year in 2021 and 2022 due to the weather (cold winter of 2021/2022). But pre-set thermostats substantially reduced the volume of gas used in 2023. Employees are made aware of best heating practice at the start of every heating season.

The GNTB's vehicle fleet comprises one car – a diesel until 2022 and now a plug-in hybrid (electric/petrol).

Water consumption – conservation initiatives and improvement

Fresh water consumption per employee and working day at the GNTB's head office has been declining for years – with the exception of the additional consumption in 2021 caused by the hygiene measures during the coronavirus pandemic.

ENERGY

	2020	2021	2022	2023
Electricity (kWh)	180,788	180,242	180,868	166,425
Gas (kWh)	221,610	295,369	378,819	195,337
Diesel (kWh)	3,049	2,138	1,634	0
Petrol (kWh)	0	0	0	3,186
Total direct energy consumption	405,447	477,749	561,320	364,948
Total heat consumption (weather-adjusted*)	301,390	342,628	511,406	271,518
Total direct energy consumption per employee	3,436	3,853	4,678	3,093
Electricity consumption per employee	1,532	1,454	1,507	1,410

*Calculated using the German National Meteorological Service's climate factors.

EMISSIONS*

	2020	2021	2022	2023
Greenhouse gas emissions (tCO ₂ eq)**	45.53	60.20	76.81	40.20

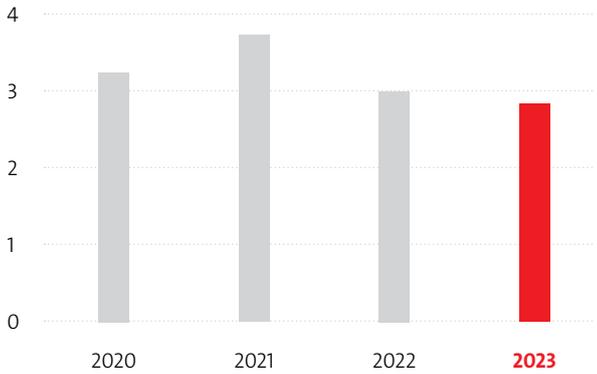
*The emissions data relates to Scope 1 energy consumption (heating and fuel).

**The direct greenhouse gas emissions are stated in carbon equivalents (CO₂eq). Each greenhouse gas contributes differently to global warming and is converted using a Global Warming Potential (GWP) factor. The best-known greenhouse gas, carbon dioxide (CO₂), serves as the baseline value.

WATER

	2020	2021	2022	2023
Fresh water/waste water (m ³)	914	930	736	770
Water consumption per employee (m ³ /employee)	7.75	7.5	6.13	6.53
Water consumption per employee and office day (l/employee × office days)	68.70	82.03	56.08	52.87

TOTAL VOLUME OF WASTE
per employee and office day
(kg/employee x office days)



PAPER CONSUMPTION – INTERNAL

	2020	2021	2022	2023
Paper (sheets)	195,135	139,435	130,977	110,835
Paper per employee (sheets/employee)	1,654	1,124	1,091	939

PRINTED MATERIALS

	2020	2021	2022	2023
Number of copies	8,500	6,000	5,500	4,500

Waste management

At head office, waste is separated for recycling (paper, packaging, biodegradable waste and general waste) in line with municipal waste collection services. As a reminder for employees, information explaining the rules for separating waste is displayed in every communal kitchen.

The total volume of waste per employee and day in the office has been continually reduced in recent years and came to 2.88kg in 2023, its lowest level to date.

Paper consumption (internal and for publications)

The GNTB has been steadily reducing the volume of paper that it uses by digitalising internal processes (MACH, Cobra), by using multifunction printers with pre-set double-sided printing and by raising awareness among the workforce of their own impact on the environment. Only printer paper certified according to the German Blue Angel, EU Ecolabel or FSC standards is purchased.

The number of copies of printed materials (e.g. annual report, facts and figures publications, progress report on sustainability) that are printed outside the GNTB is being reduced in line with actual need and physical copies are replaced wherever possible by digital versions.

Any other printed materials are printed in line with the criteria for German Blue Angel certification.

Supply chains/procurement

Procurement at the GNTB is handled in line with the legally binding rules on tenders. In all types of request for tender, commercial, social and environmental criteria must be considered.

They include acquisition and lifecycle costs, suitability for use, energy requirements in day-to-day operations, innovativeness and potential use of AI to boost efficiency in business processes.

Accepting social responsibility

The ongoing improvement in the GNTB's sustainability performance depends on the involvement of its workforce. At the same time, the organisation bears social responsibility for its employees, because only a responsible, well-rounded working atmosphere induces a high level of productivity.

Actively involve employees

In 2024, the GNTB's interdisciplinary environmental team was headed up by the environmental officer and comprised sustainability ambassadors from all departments, who acted as contact persons and messengers for all matters relating to sustainability and the environment. This structure ensures that the organisation takes sustainability aspects into account in the course of its business.

In order to promote accessibility further, the GNTB offered seminars on accessible communication and on accessible tourism in general in 2024.

Responsibility for the workforce

Staffing at the GNTB was again marked by a high level of continuity in 2024. Long-term employment relationships secure functional knowledge of workflows, foster continuous improvement processes, and provide business planning certainty for the organisation and security for employees.

The average age stood at 42 in 2024. Forty per cent of the workforce has been employed for at least ten years,

with almost a quarter having been with the GNTB for more than 20 years. These core figures have changed only marginally over the last five years.

In order to expand employees' job-specific knowledge and boost non-job-specific expertise, such as social and interpersonal skills and methodological skills, the GNTB offered more than 50 seminars for its employees worldwide in 2024.

For financial reasons, the majority of the training on specific professional topics was held online, which was particularly resource-efficient and saved time on travel.

To enhance work-life balance and boost productivity, the GNTB continued to facilitate flexible and remote working in 2024, provided the needs of the job – such as being available online – were still met.

Green Globe and EMAS certification for head office

The GNTB's head office has been Green Globe certified for twelve years and now holds platinum status. The GNTB was also involved in the ECOPROFIT regional environmental programme from 2014 until it was discontinued in 2024.

The first EMAS certification was obtained at the end of 2024 with the aim of defining targets and initiatives to reduce the environmental impact of the GNTB at its offices around the world too.

EMPLOYEES

	Women (%)	Men (%)
Total employees	67.6	32.4
Employees in management positions	58.3	41.7
Parents in management positions	11.69	10.2
Employees on parental leave	1 (absolute)	0 (absolute)



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