

# Pre-coronavirus: 10th record year for inbound tourism to Germany in 2019

**1.4 billion  
international  
arrivals\***

## Destination Germany

... ranked first in the NBI overall and for “image”\*\*\*

... is the top international trade fair destination\*\*\*\*

For Europeans in 2019\*\*:

... is the no. 1 cultural travel destination

... is the top city-break destination

... is ranked first for luxury travel

... is the second-most popular destination for Europeans

**89.9 million  
overnight  
stays\*\***

**Jan-Dec 2019  
up 2.6%\*\***

Source: \*World Tourism Organization (UNWTO), January 2020;  
\*\*GNTB/WTM, IPK 2020;  
\*\*\*Anholt-IPSOS Nation Brands Index 2019 Report, October 2019;  
\*\*\*\*AUMA 2020.

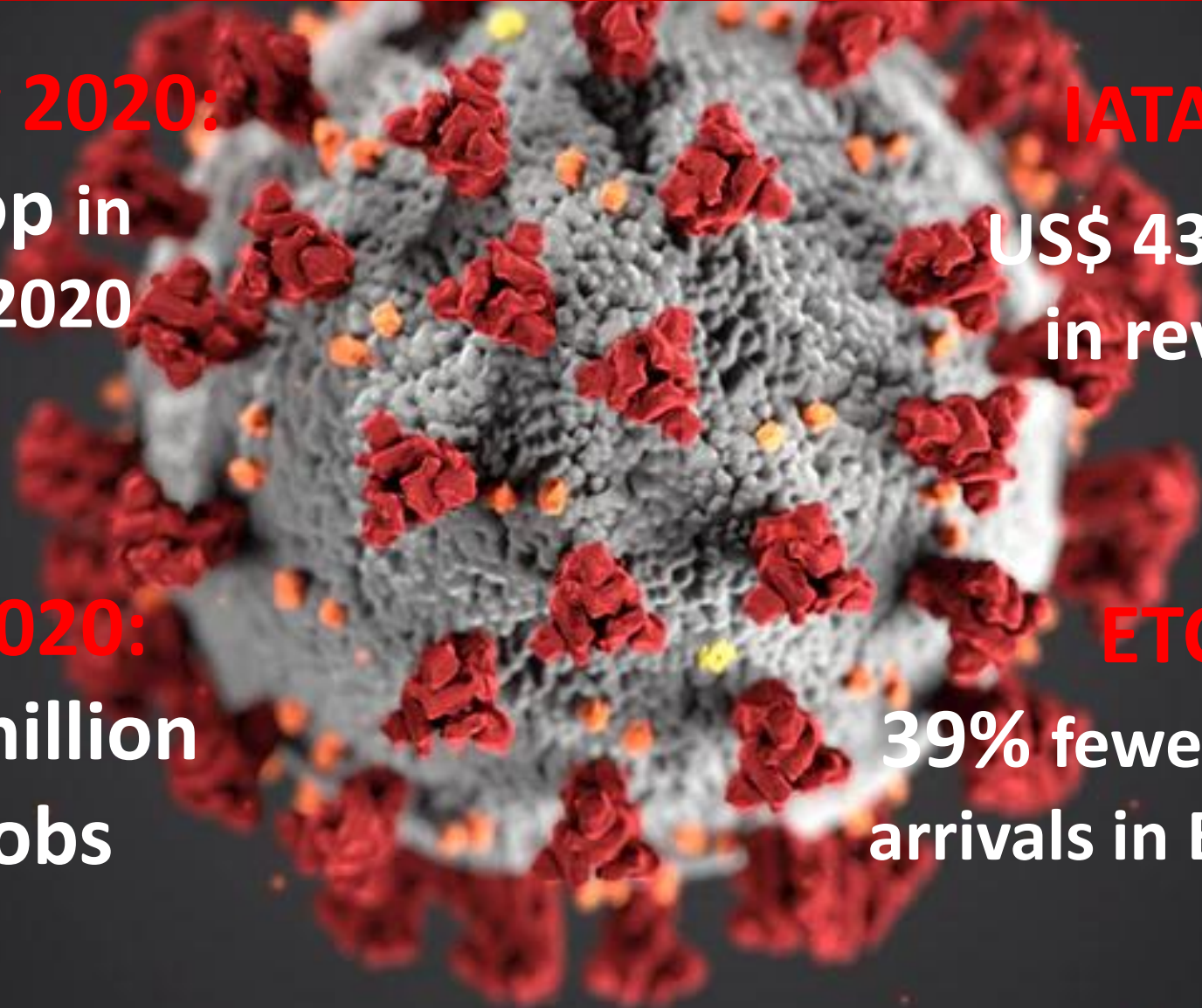
# 2020: Drastic decline and losses across the tourism industry

**UNWTO, May 2020:**  
60 to 80% drop in  
intl. tourism in 2020

**IATA, June 2020:**  
US\$ 434 billion drop  
in revenue in 2020

**WTTC, June 2020:**  
Around 200 million  
fewer travel jobs

**ETC, May 2020:**  
39% fewer international  
arrivals in Europe in 2020

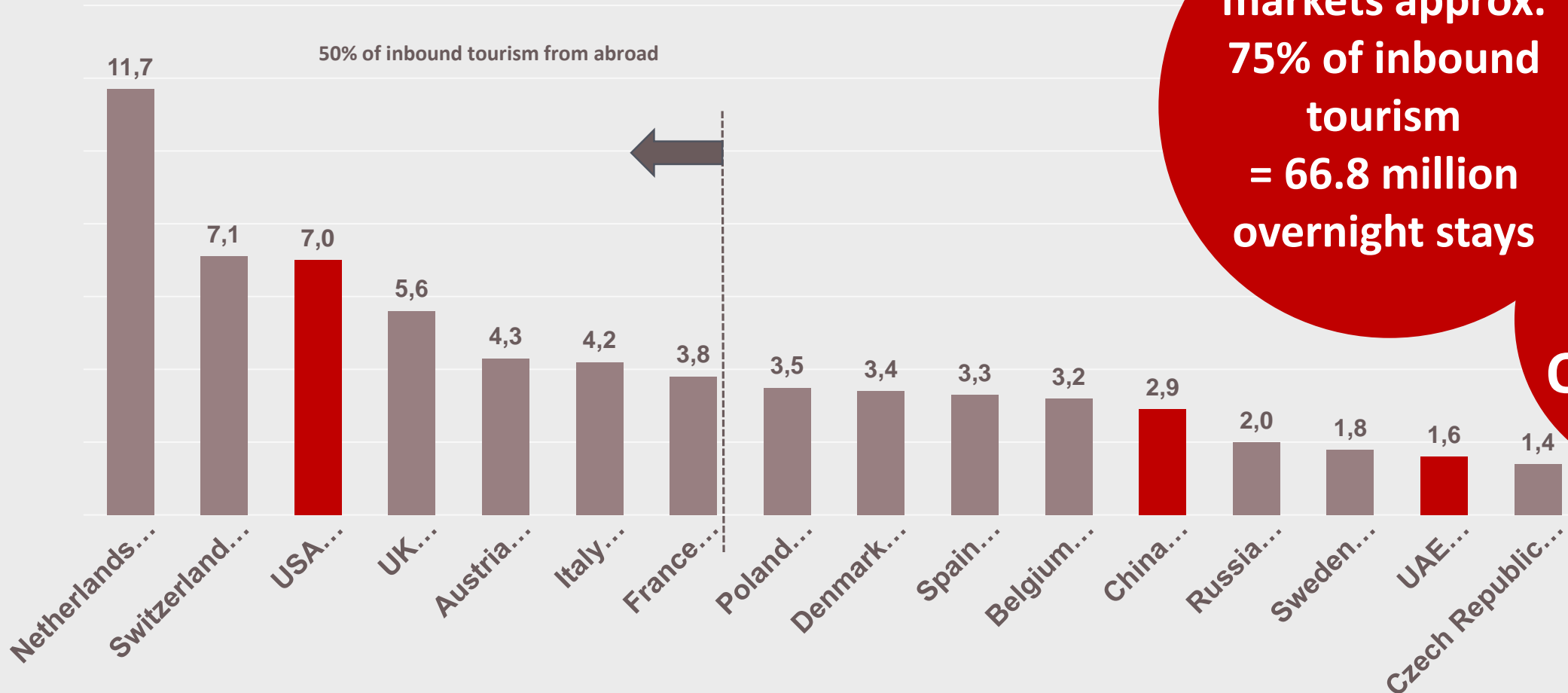




**What next?  
Global knowledge is  
key in the market**

# After coronavirus, the focus is on Europe with a 72% share of inbound tourism to Germany in 2019

## Million overnight stays



Top 16  
markets approx.  
75% of inbound  
tourism  
= 66.8 million  
overnight stays

89.9  
million  
OS in total



# Huge drop in inbound tourism from March onwards after steady start to 2020

Original GNTB  
forecast for  
2020\*\*  
up 2% to 3%

Jan-April  
2020/19  
down  
44.3%\*

## Tourism Economics

Baseline scenario for 2020

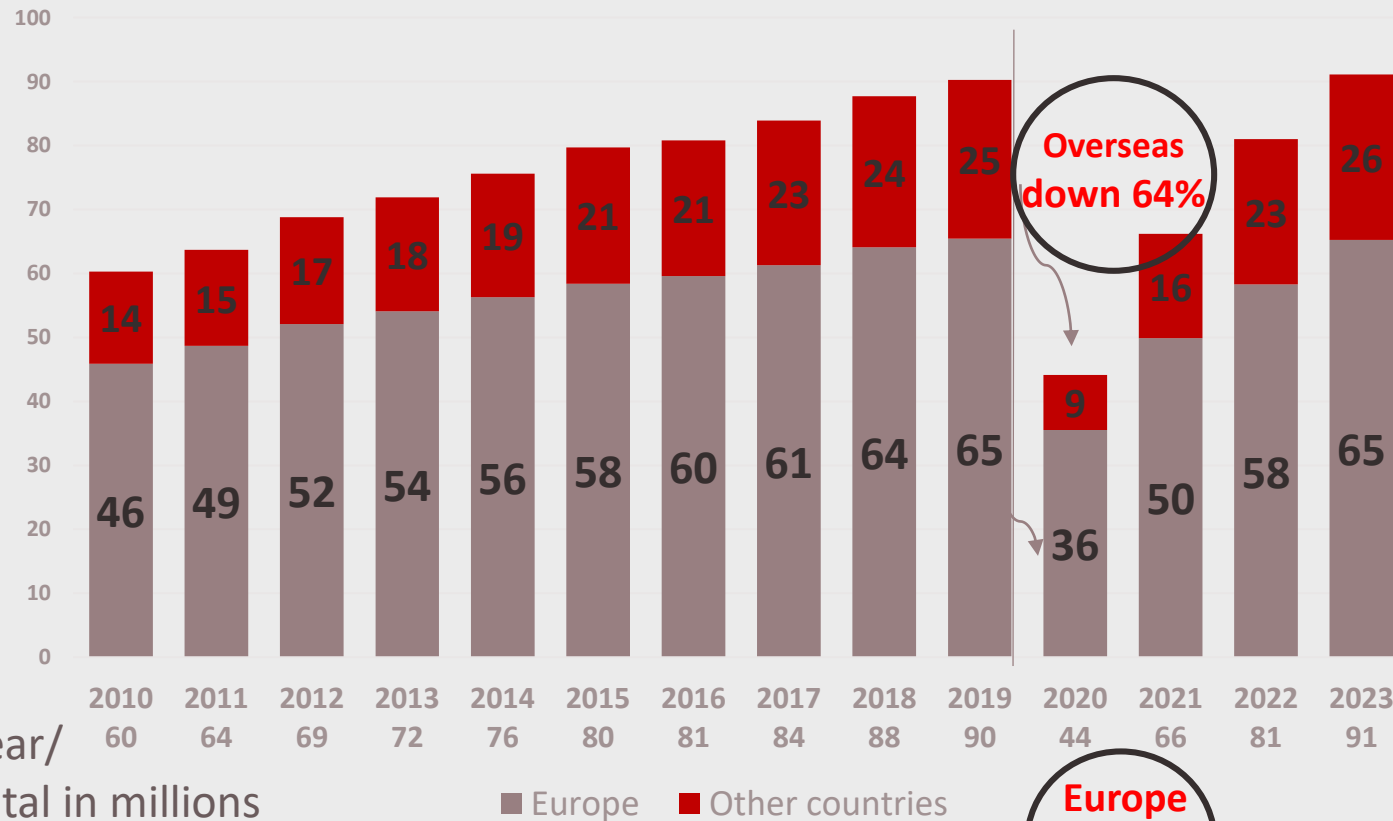
Arrivals	down 54%
Overnight stays	down 46mn (51%)
Revenue	down €17.8bn

\*Provisional figures, Federal Statistical Office 2019;  
accommodation statistics incl. camping.

\*\*GNTB market research; Tourism Economics travel scenario analysis,  
June 2020.

# Recovery to 2019 OS levels expected at the end of 2023 (TE baseline scenario)

Overnight stays (OS) in Germany in millions  
by source region



**Faster recovery in European source markets  
in 2020, 2021 and 2022**

**Increased market share for inbound  
tourism to Germany from Europe:**

**2019 72%  
2020 81%  
2021 75%  
2022 72%**

**Tourism Economics baseline scenario**

**Assumptions:**

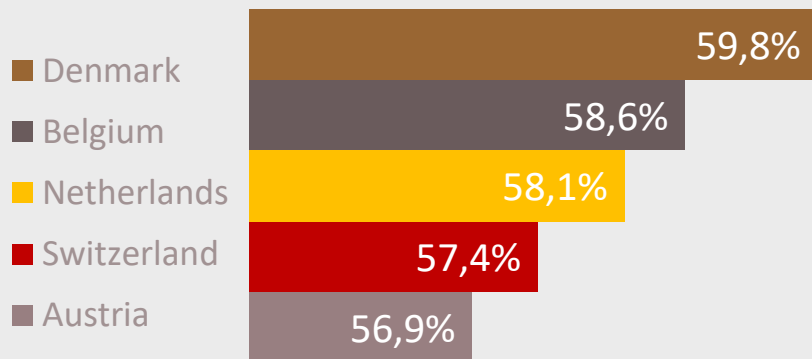
**Lockdown short haul March to June 2020;  
medium to long haul later in 2020**

# Quick recovery in 5 neighbouring countries for inbound tourism to Germany in 2020 (TE baseline scenario)

## Top 15 source countries

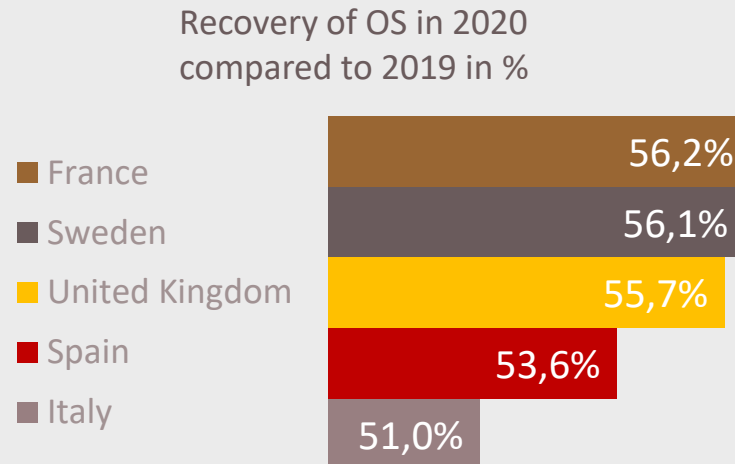
### Top 5 quick recovery countries

~ 17.3 million OS in 2020



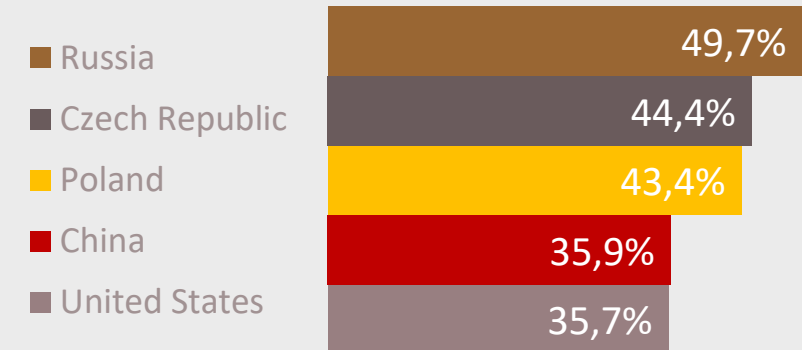
### 5 medium-pace recovery countries

~ 10.2 million OS in 2020



### 5 slow recovery countries

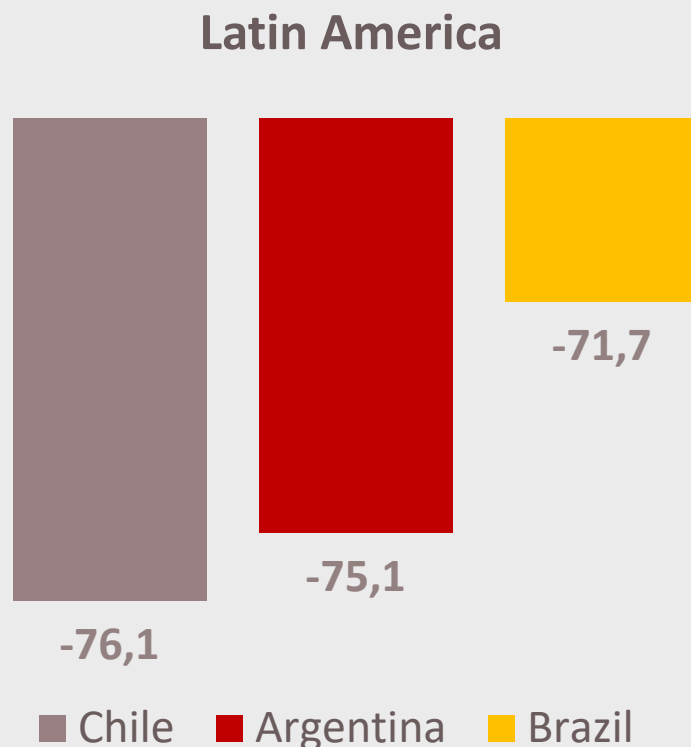
~ 6.7 million OS in 2020



**Conclusion: budget switch to the neighbouring countries in 2020**

# Low inbound tourism expected from Latin American source markets in 2021/22

Rate of change for flight bookings to Germany  
2020 compared to 2019



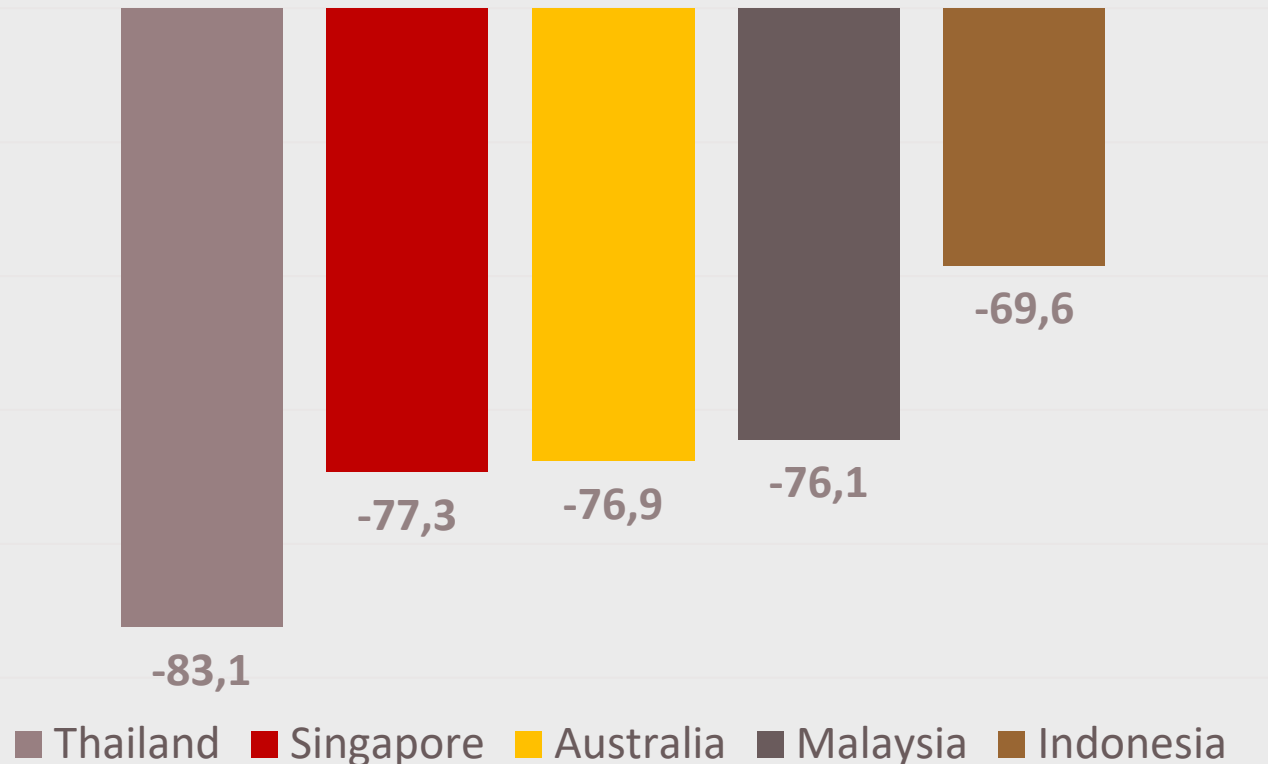
**Overnight stays in inbound tourism to Germany from Brazil and the other Latin American countries has been stagnating at a level of around 1.4 to 1.5 million per annum for three years.**



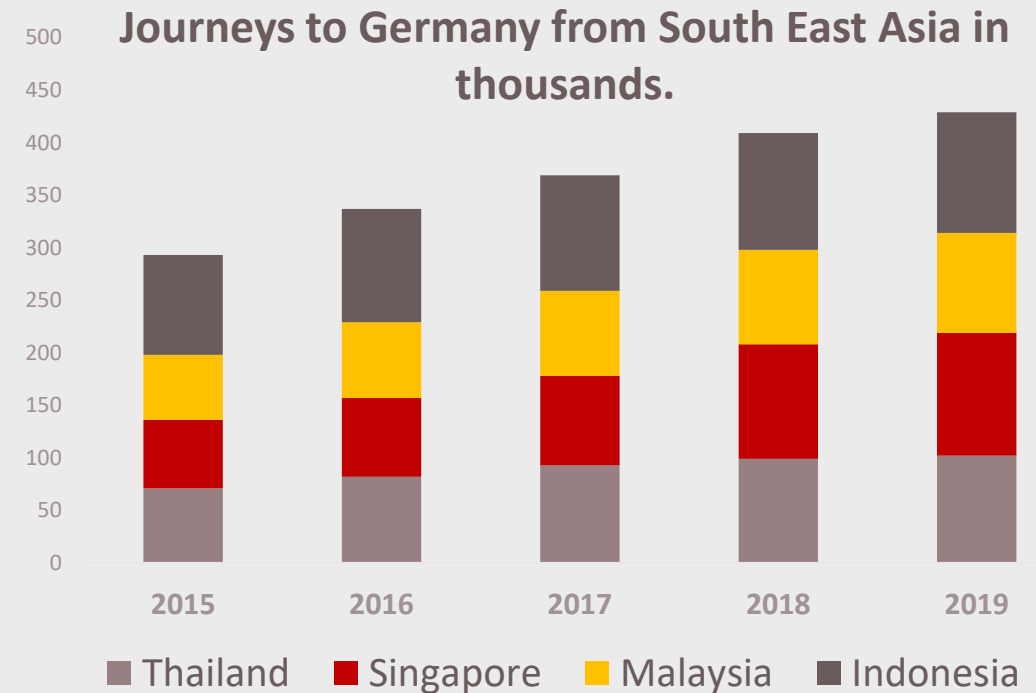
# Low inbound tourism expected in 2021 from Australia and South East Asia

Rate of change for flight bookings to Germany  
2020 compared to 2019

## South East Asia/Australasia



**Positive trend for Thailand, Singapore, Malaysia and Indonesia up to 2019.  
Current flight bookings at critical levels!**

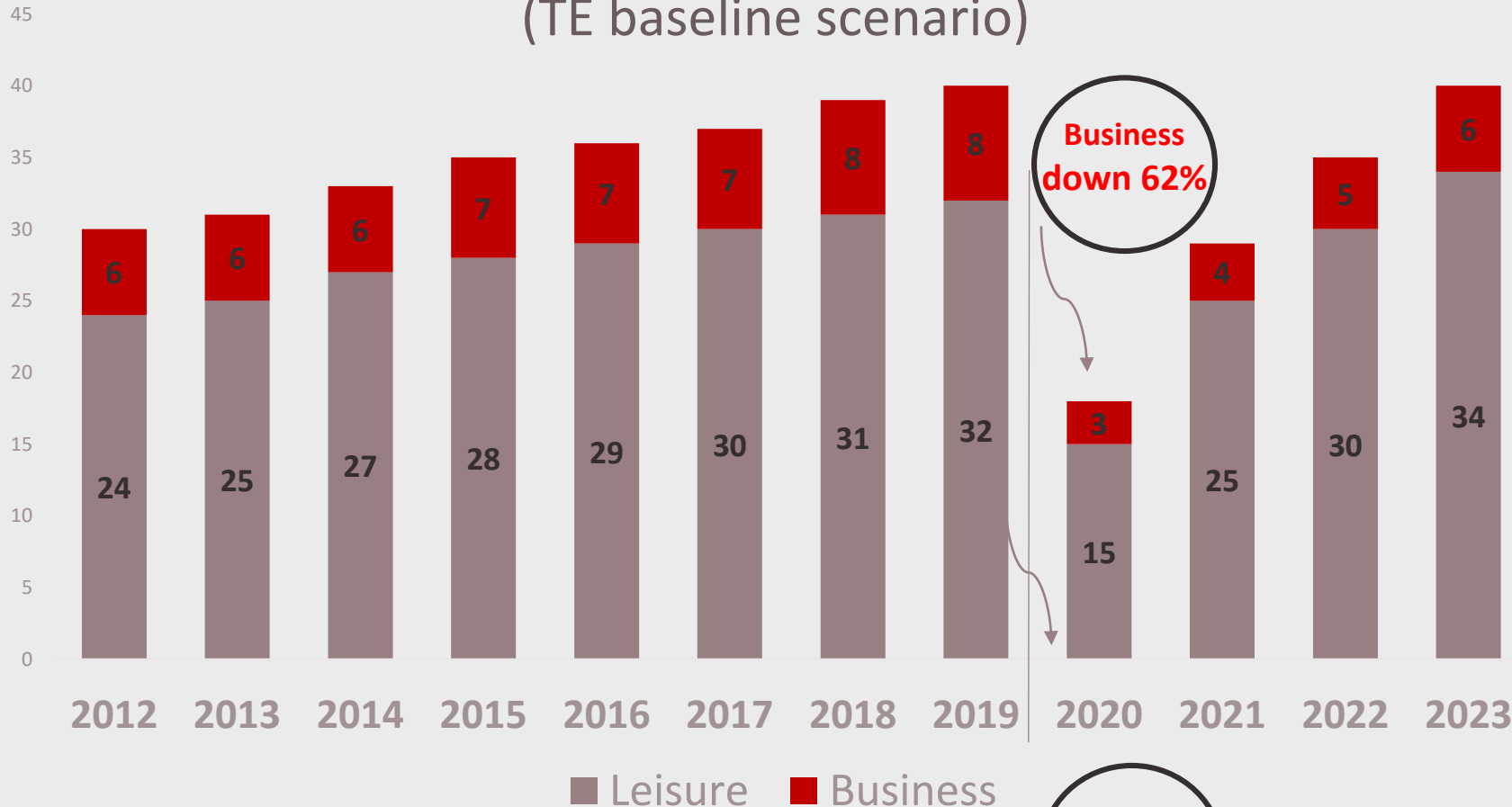


Source: flight bookings according to ForwardKeys.  
Inbound travel according to IPK International.

**2019: ¼ of arrivals are for business.**

**2020: leisure down 53%, business down 62%**

Arrivals in millions by business and leisure  
(TE baseline scenario)



**Business-related arrivals will not reach 2019 levels even in 2023!!!**