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INBOUND TOURISM

Boost international tourism · Support SMEs · Unlock commercial potential

ANNUAL REPORT
OF THE GERMAN NATIONAL TOURIST BOARD

ANNUAL REPORT

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“International tourism will remain a growth sector in the medium- and long-term. People want to travel, relax, experience new cultures and enjoy life.”

Dear reader,
dear partners in travel to Germany,

International tourism once again demonstrated its resilience in 2025 in the face of an increasingly fragile world order. Despite international trade disputes, UN Tourism recorded 1.57 billion tourism arrivals worldwide in 2025, an increase of 4 per cent year on year.

Germany maintained its position among the top ten most popular travel destinations in the market. The number of holiday travellers from Europe to Germany at the end of 2025 matched the levels seen in 2024, while the business travel market continued to struggle, primarily because many traditional business trips continue to move online. We even recorded a considerable rise of 8 per cent in holiday trips from overseas markets.

Nevertheless, the solid results for 2025 should not mask the fact that many regional conflicts are ongoing. The long-standing conflicts in the Middle East, for example, erupted into open warfare at the end of February 2026. At the time this report was published, it was still unclear how long these armed conflicts will last or how far they will spread.

However, we anticipate that the disruption to air travel between the Asia-Pacific region and Europe via the hubs in the Gulf States, the blockade of the Strait of Hormuz and the subsequent sharp rise in oil and kerosene prices, and the resulting economic crises in several countries, will have an impact on international tourism in various regions in 2026.

When war broke out, the GNTB immediately took comprehensive measures to gauge the potential impacts on inbound tourism to Germany and to minimise the risks. A dedicated crisis task force is coordinating the ongoing analysis of data on current developments. The weekly aggregated monitoring provides the basis for in-depth discussions with stakeholders, partners in travel to Germany and the international travel trade, actors in the political arena and nationwide tourism organisations.

At the operational level, marketing budgets for the affected markets were frozen and planned activities were either adapted or postponed. For the duration of the conflict, the GNTB is strategically focused on developing resilient markets in Europe and selected overseas markets.

International tourism will remain a growth sector in the medium- and long-term. People want to travel, relax, experience new cultures and enjoy life. Accordingly, positioning Germany as an attractive holiday destination in the market is key to sustaining inbound tourism.

Germany is able to compete in this market as a safe, service-oriented quality destination that has a clear brand profile and offers great value for money. This is the foundation upon which we are basing our strategy for marketing Destination Germany around the world.

Our broad source-market base represents an opportunity. We currently generate three quarters of inbound tourism to Germany in Europe, and we are focusing our marketing activities and budgets there accordingly. In the long term, we see considerable growth potential in overseas markets, primarily in the Asia-Pacific region. With this in mind, we laid the groundwork in 2025 by preparing to reopen the sales and marketing agencies in Toronto, São Paulo and Singapore.



Petra Hedorfer
Chief Executive Officer



Andrea Bartl
Commercial Director

We have placed the values that already set Germany apart as a travel destination at the heart of our brand strategy: cultural heritage, vibrant cities and exceptional natural landscapes. Their ability to draw in tourists is boosted by our culture of hospitality, which embodies openness, authenticity, quality of service and a passion for innovation. These values formed the DNA of our global campaigns and key themes in 2025, and we will continue to embrace them in 2026.

Our digital strategy is the key tool for successfully communicating our messages to travellers and the travel industry worldwide. In 2025, we made further progress in implementing AI applications in operational processes across all areas of the business. In this context, the linking of our GNTB Knowledge Graph to MCP server technology stands out as a beacon project. The use of open data from the Knowledge Graph has become standard practice in our global campaigns and is widely utilised by our partners in the travel industry in the markets and by global platforms. This strengthens Germany's position as a tourist destination and the presence of small and medium-sized German tourism providers in international markets.

We would like to take this opportunity to thank all employees at the head office in Frankfurt and in our international offices, whose hard work and creative ideas have played a considerable part in our organisation's success.

Through its international networks and by sharing its extensive expertise across many levels, the GNTB makes it easier for Germany's predominantly small and medium-sized tourism businesses to access international markets. The federal funding that the GNTB receives therefore constitutes active support for SMEs. The coalition agreement includes a clear commitment to inbound tourism, and the grant for 2025 / 26 gives us, and therefore the entire industry in Germany, a reliable basis for planning. The national tourism strategy, which was completely revised within a few months, defines the agreed guidelines in greater detail for all stakeholders.

We would like to thank all actors in the political arena for the constructive partnership, in particular Member of the German Parliament Dr Christoph Ploß in his role as Federal Government Coordinator for the Maritime Industry and for Tourism, and the German Bundestag's Tourism Committee chaired by Anja Karliczek, Member of the German Parliament, and its deputy chair Stefan Zierke, Member of the German Parliament.

The GNTB Board of Directors and its President, Brigitte Goertz-Meissner, and Vice-Presidents Michaela Kaniber, Bavarian Minister of State for Food, Agriculture, Forestry and Tourism, Reinhard Meyer, President of the German Tourism Association and Guido Zöllick, President of the German Hotel and Restaurant Association, and the GNTB Marketing Committee and Advisory Board have been unwavering in their support and appreciation for our work. They are a constant source of motivation and we cannot thank them enough for this.

Petra Hedorfer

Andrea Bartl



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

“Tourism is a significant contributor to the overall economy in Germany, too, and a driver of growth in many other sectors.”

Dear reader,

Tourism is one of the world's leading growth industries. UN Tourism, for example, recorded nearly 1.6 billion international tourist arrivals last year, and around 10 per cent of jobs in the countries visited are in the tourism sector.

Tourism is a significant contributor to the overall economy in Germany, too, and a driver of growth in many other sectors, including construction, transport and infrastructure, retail, and arts and entertainment.

Inbound tourism is a major pillar in this regard. Visitors from around the world spent around €78 billion during their stay in Germany, an increase of 1 per cent year on year and almost a third more than the previous record year of 2019.

Despite exceptionally challenging conditions caused by geopolitical conflicts, the GNTB played a vital role last year in stabilising and strengthening our country's strong position as a travel destination. The 55.8 million trips recorded in 2025 once again place Germany second as a destination for European travellers – behind Spain and ahead of France. Furthermore, Germany ranks first for city breaks and cultural tourism among European travellers, and second for nature-based tourism. It is also the world's leading destination in the challenging business travel market.

But there are no guarantees that this success will continue. The war in the Middle East, for example, has seen geopolitical conflicts significantly escalate in 2026, with as yet unforeseeable consequences for global travel and economic stability in key source markets. Furthermore, Germany's inbound tourism sector as a whole operates in a highly competitive market, as many countries are keen to capitalise on the potential for global growth.

We have therefore clearly defined tourism as an area for action in the coalition agreement. And within a few months of the federal government taking office, we presented a national tourism strategy that sets out a clear vision for the sector.

We have already launched a number of initiatives, such as providing financial relief to businesses through the reduction in VAT for the hospitality sector and the cut in aviation tax.

These specific measures form part of a regulatory framework that is put into practice by all stakeholders in the multi-faceted tourism industry. The GNTB once again did an excellent job in this regard last year.

The progress made with the digital transformation is particularly worth mentioning. New technological developments in the Open Data / Knowledge Graph project are making Germany's tourism offerings more visible. This service is now used by many providers in the German tourism sector, as well as in the international travel industry. The open data made available is an effective springboard for AI-based business models. This benefits all companies in the tourism value chain, but especially the many small and medium-sized businesses.

The future viability of tourism has been and remains another important element of the GNTB's strategy. Key aspects in this regard include a healthy environment, the preservation of authentic culture, inclusion, and the creation of tourism-related added value in harmony with nature, the countryside and the local population. The GNTB has set the benchmark with its approach to communication, both nationally and internationally.

I would like to thank the Executive Board, the entire GNTB team and the committees for all their hard work and dedication.



Dr Christoph Ploß



“The digital transformation has been and remains a key objective of the GNTB’s Executive Board.”

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

Dear reader,

The GNTB presents its activities to promote inbound tourism to Germany in 2025 in this publication.

The annual report highlights how the GNTB has used eye-catching marketing campaigns to further enhance Destination Germany’s image around the world. ‘Cultureland Germany’ and ‘Embrace German Nature’ featured the key elements of the brand essence, ‘Feel Good’ presented our leading role in creating future-proof, responsible tourism and ‘Season’s Greetings’ once again used the latest digital tools to showcase authenticity and tradition. The key themes ‘50 years of the German Fairytale Route’ and ‘275th anniversary of the death of Johann Sebastian Bach’ were an additional reason for culturally minded travellers to choose Germany as their destination. In the context of the global campaigns, numerous innovative initiatives attracted considerable attention in the markets. Working closely with its partners in travel to Germany, the GNTB expanded its international network. In addition to companies in the travel industry, this includes the tourist boards of its European partners. The aim is to firmly establish our continent as the biggest target region for global travel for the future.

The digital transformation has been and remains a key objective of the GNTB’s Executive Board. Digital tools, big data and AI applications dominate large areas of the value chain in the international tourism industry. In a comparison of European competitors, Germany already scores very highly. The GNTB used a range of formats to share insights from its Business Intelligence unit and from pilot projects, thus making a substantial contribution to supporting the sectors’ small and medium-sized enterprises.

The Board of Directors fully supports the GNTB’s strategic approach to positioning Destination Germany as a high-quality, innovative and service-oriented destination around the world in an increasingly competitive arena.

Despite exceptionally challenging times for the international travel industry, the GNTB was able to showcase Germany's attractiveness as a travel destination and strengthen inbound tourism as a key contributor to Germany's economy.

On behalf of the Board of Directors, I would like to congratulate the Executive Board and the entire GNTB team at the head office in Frankfurt and all international offices for this ongoing success story.

We have no doubt that an increasingly volatile and fragile geopolitical situation presents challenges for international tourism. As yet, it is impossible to gauge the short- and medium-term impacts of the war in the Middle East in 2026.

Nonetheless, we believe that there is considerable potential for growth, primarily in the Asia-Pacific region and in Latin America. Accordingly, the Executive Board proposed to expand the foundations for business development in overseas growth markets. The Board of Directors has agreed to this and decided to reopen the sales and marketing agencies in Toronto, São Paolo and Singapore in 2026.

In addition, the Board of Directors appointed Andrea Bartl as the GNTB's Commercial Director on 1 November 2025. We would like to thank our fellow member of the Board of Directors, Benedikt Esser, for all his work as an interim member of the Executive Board and wish Andrea Bartl every success in her new role.

I would also like to thank the GNTB's partners in the political arena for their invaluable support: the German Bundestag's Tourism Committee chaired by Member of the German Parliament Anja Karliczek, and the Federal Ministry for Economic Affairs and Energy and its Federal Government Coordinator for the Maritime Industry and for Tourism, Dr Christoph Ploß, Member of the German Parliament.

We are confident that the GNTB, in partnership with policymakers, is taking the right approach to further boosting inbound tourism to Germany and thus supporting SMEs in Germany's tourism sector.



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

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.)



Stand-up paddle boarding near Oberbaumbrücke bridge on the Spree river in Berlin



01

DESTINATION GERMANY
in the international market

Germany's inbound tourism sector makes a significant contribution to positioning Germany in the international markets. Germany's excellent international image is shaped by its reputation as a high-quality, service-oriented holiday destination. Germany is a leader when it comes to cultural and nature-oriented tourism, city breaks and business travel.

Domestically, inbound tourism is making an ever-increasing contribution to economic value creation. This secures jobs in an industry that consists predominantly of small and medium-sized enterprises.

To ensure that Germany can continue to benefit from the global growth in tourism, the GNTB focuses on creating an unmistakeable brand profile and on making progress with the digital transformation, primarily by integrating AI applications along the entire value chain.



Global tourism in 2025

Growth despite geopolitical conflicts

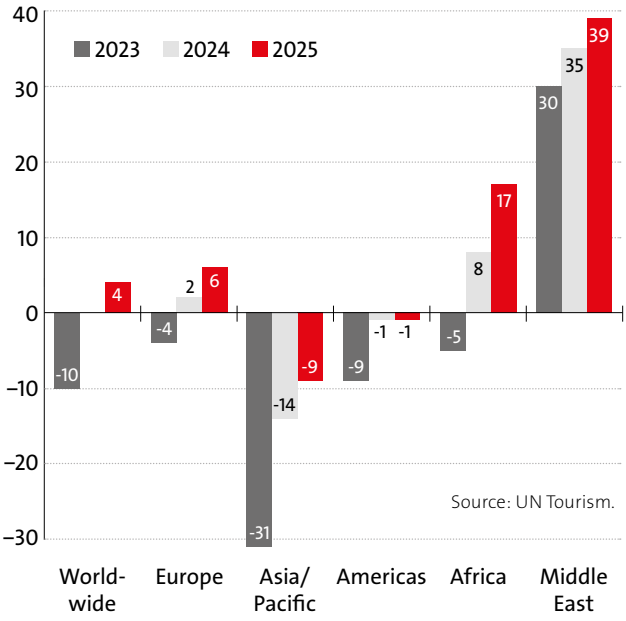
UN Tourism recorded 1.52 billion international tourism arrivals in 2025, a rise of 4 per cent year on year and a new record figure. For the first time, international arrivals have surpassed the figures of 2019, the previous record year. Sustained high consumer demand, robust economic growth in major source markets worldwide and the ongoing recovery of destinations in the Asia-Pacific region following the pandemic have ensured continued growth despite inflation and geopolitical conflicts. UN Tourism also identified better flight connections and simplified visa rules as additional success factors.

All of the world's major travel regions have participated in this growth. Europe remained the largest source and target market for international travel in 2025 with growth of 4 per cent to 793 million arrivals. The Asia-Pacific region also performed strongly but is yet to return to pre-pandemic levels.

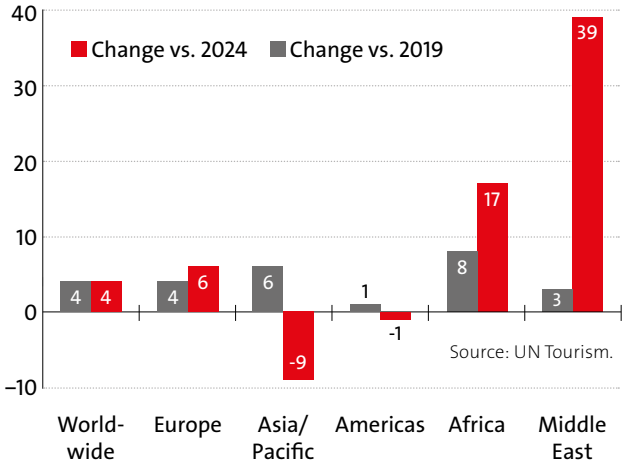
International market research institutes such as Tourism Economics are forecasting further annual growth of between 5.5 and 6.3 per cent up to 2030. The main drivers of growth at regional level are the source markets in the Asia-Pacific region with their growing middle class. Technologically, the digital transformation is enabling efficiency gains, additional tourism services and new experiences that are boosting international tourism.

Spending by visitors grew faster than visitor numbers in many destinations, reaching US$ 1.9 trillion in 2025 according to preliminary estimates, a 5 per cent increase year on year. Based on available data, UN Tourism estimates that total export revenues from tourism (including receipts from passenger transport) reached US$ 2.2 trillion in 2025.

INTERNATIONAL ARRIVALS (%)



INTERNATIONAL ARRIVALS (%)



Destination Germany in the European market

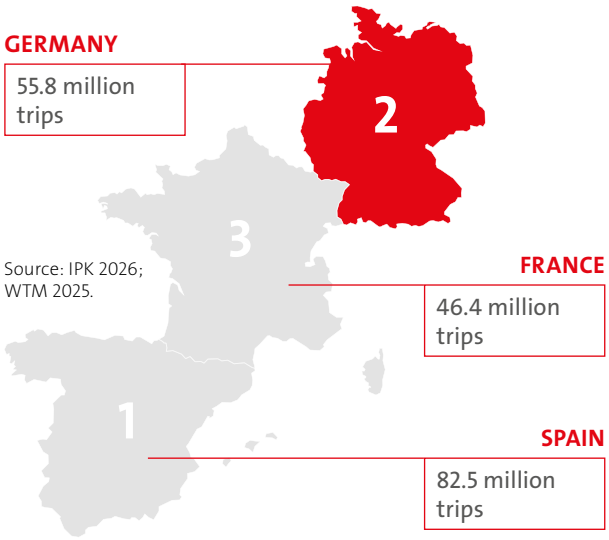
International tourism is increasingly sensitive to current developments. By the end of the first quarter of 2025, economic policy decisions by the US government, such as the imposition of punitive tariffs and the prospect of escalating global trade conflicts due to retaliatory measures by the countries affected, were already unsettling the global economy and, consequently, the closely interconnected international travel industry.

This is apparent when comparing the data from the Monitoring Sentiment for Intra-European Travel survey, which is conducted quarterly by the European Travel Commission. For example, Europeans' desire to travel fell 4 percentage points during the first quarter of 2025 compared with the prior year, recovered over the summer to reach its highest level since records began and returned to the prior year's level by the end of 2025.

This is reflected in a mixed picture for inbound tourism to Germany over the course of the year. Tourism Economics, for example, adjusted its forecast for 2025 between January and October from 92.8 to 83.9 million international overnight stays in Germany. The GNTB Travel Industry Expert Panel's Business Climate Index for Germany fell from 56 points in the first quarter to 41 points in the third quarter and only recovered to prior-year levels at the end of the year.

In addition to feeling the effects of global uncertainty, Germany also struggled during the summer months – compared with the same period in 2024 – due to the one-off effects of the additional visitor numbers generated by EURO 2024, major events and changes to public holiday dates. The structural shift in the business travel segment presented another challenge, with traditional

business trips increasingly moving online. As the world's leading business travel destination, this affects Germany more than most.



Source: IPK 2026; WTM 2025.

By the end of 2025, Germany recorded a fall in international overnight stays of 0.8 per cent. Germany remained the second-most popular destination market for Europeans in 2025.

Nevertheless, Germany has performed above average in some areas, according to IPK International. The length of stay, for example, climbed by 2 per cent to 6.7 nights, a larger rise than the average across Europe (1 per cent). Rail travel to Germany increased by 6 per cent, a significant gain compared with the 1 per cent rise in overall European outbound rail travel.

Germany was able to maintain its strong position in established market segments with strong international demand, such as city breaks, and in source markets such as Europe. Upward trends were particularly evident in the growth markets of Asia and the Americas.

Inbound tourism to Germany in 2025: growing economic significance

According to IPK's 2026 WTM, the spend by international visitors to Germany increased yet again in 2025 to reach a record €78.5 billion, a rise of 1 per cent. Travellers from Europe accounted for two thirds of revenue, while overseas visitors accounted for one third.

MEDIUM-TERM REVENUE GROWTH, INBOUND TOURISM TO GERMANY (€ BILLION)

	Europe	Overseas	Total
2019	38.5	27.5	66
2020	13.3	5	18.3
2021	14.4	5.6	20
2022	31.9	15.1	47
2023	45.9	24.4	70.3
2024	50.3	27.4	77.7
2025	**51.8**	**26.6**	**78.4**

Includes travel, accommodation, food, onward travel, shopping etc. Includes company share for business travel.

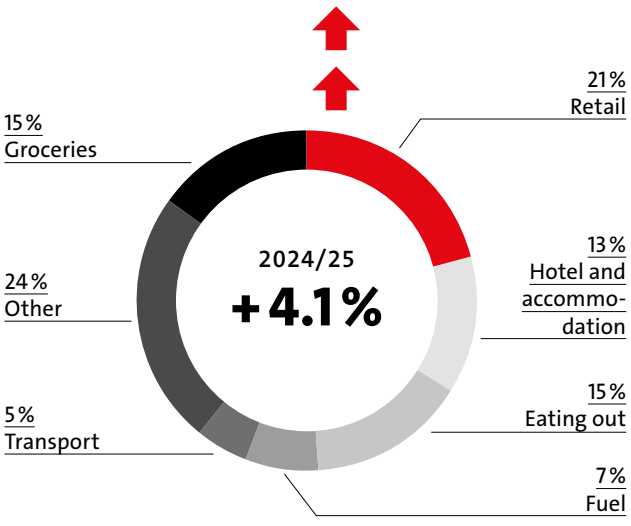
The lion's share of travel expenditure benefits domestic companies and strengthens the retail sector and the small and medium-sized businesses that dominate Germany's tourism sector. According to VISA Destination Insights, direct consumer spending by international visitors to Germany rose by 4.1 per cent in 2025.

International overnight stays:

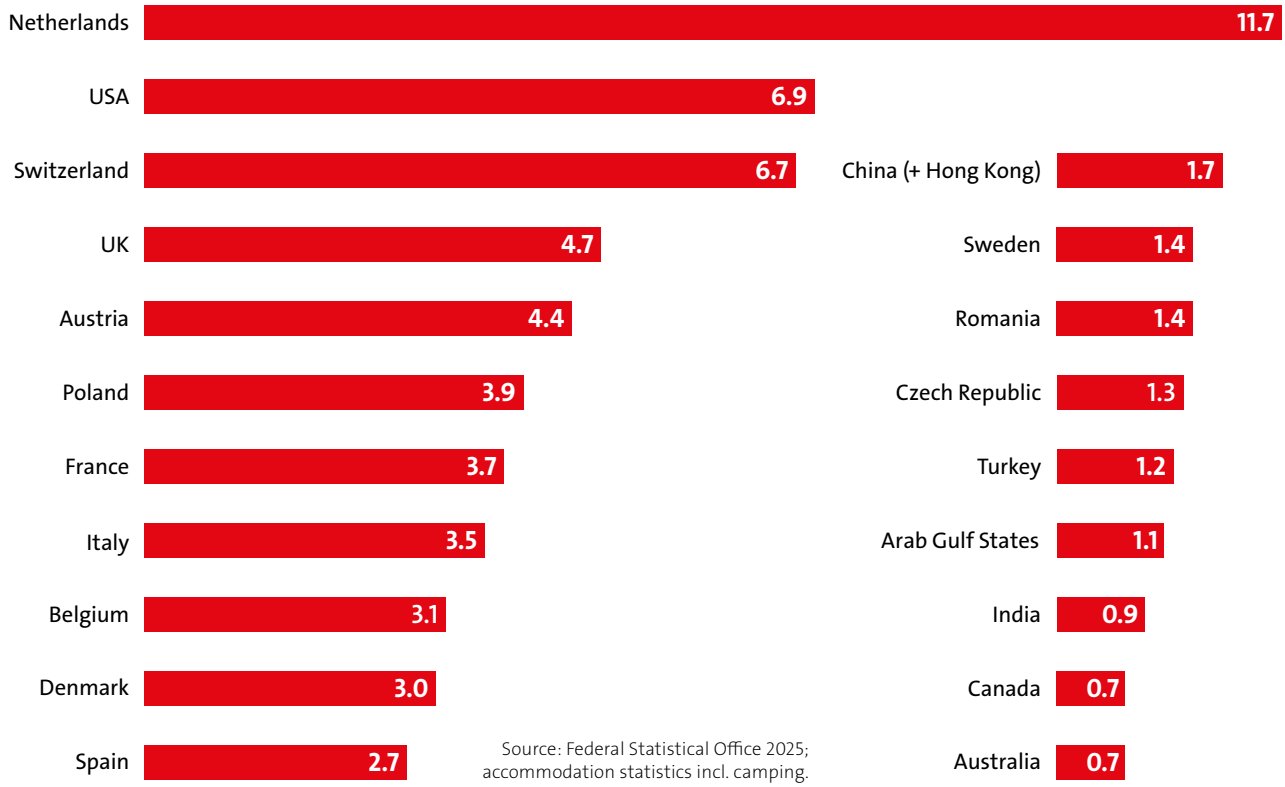
CONSUMER SPENDING, INBOUND TOURISM TO GERMANY IN 2025

Top 5 spenders, retail in Germany in 2025

1. USA, 2. Switzerland, 3. France, 4. Netherlands, 5. China



TOP SOURCE MARKETS FOR INBOUND TOURISM TO GERMANY IN 2025 (MILLION)



Source: Federal Statistical Office 2025; accommodation statistics incl. camping.

Top source markets reaffirm their position

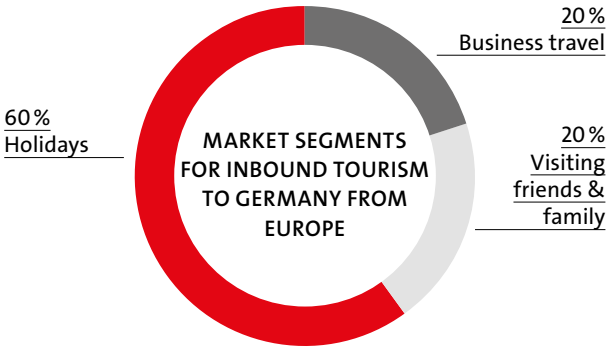
There was little change in the ranking of key source markets for inbound tourism to Germany in 2025 compared with the prior year. The figures from the German Federal Statistical Office largely reflect the one-off effects of UEFA EURO 2024 and major concert events in 2024, as well as the weaker business travel market, with a slight decline in the number of overnight stays. Overall, hotels and accommodation providers with at least ten beds recorded 83.6 million international overnight stays by the end of 2025, a fall of 2.0 per cent. The one-off effect of UEFA EURO 2024 was particularly noticeable in the statistics for overnight stays from the UK in 2025, and the stubbornly difficult economic conditions in the UK did not help matters. As a result, the UK generated 11.7 per cent fewer overnight stays over the course of 2025.

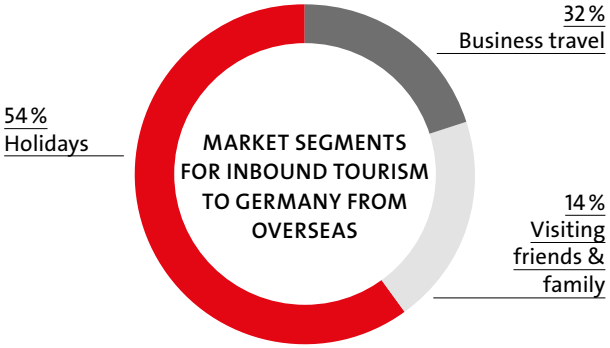
24 per cent of all holiday trips by international visitors to Germany focus on culture: Europeans' top cultural travel destination worldwide

Varied performance in the market segments: Germany gains as a holiday destination

According to IPK International, European demand for holidays in Germany remained at the same level as the year before. Holidays in the countryside (up 2.32 per cent) and multi-destination tours (up 4 per cent) provided a boost; summer holidays in the mountains and by the water also saw increases, while city breaks remain the largest market segment, even without any change in percentage terms. The one-off effects in 2024, driven by UEFA EURO 2024 and major concerts, were reflected in a significant 16 per cent decline in event attendance in 2025.

The business travel sector remained under pressure overall due to structural shifts. According to analyses conducted by IPK International on behalf of the GNTB and the German Convention Bureau, this represented a drop of 6 per cent year on year to 13.8 million trips to Germany.





As business travel accounts for a large proportion of total inbound tourism to Germany, shifts in the global business travel segment have a disproportionately large impact on Germany.

To put that into context, business trips account for 11 per cent of all outbound travel across Europe, compared with 20 per cent of inbound tourism to Germany.

Holiday travel from Europe to Germany in 2025 remained at the same level as 2024, while business travel fell by 6 per cent, as did other private travel. While operators in the sector of promotable business travel, such as trade fairs, conferences and incentive travel, successfully maintained their business levels of 2024, traditional business travel lost market share in inbound tourism against the backdrop of the economic situation and the continuing shift towards virtual platforms.

An analysis of travel to Germany from overseas shows more clearly how the trends seen in Europe are repeated here. IPK calculated an increase of 13 per cent in holiday travel year on year, while business travel saw a slight fall of 3 per cent. Overall, intercontinental trips to Germany increased by 1 per cent. The biggest percentage gains were generated in the city breaks segment, up 15.8 per cent, and in multi-destination tours, up 6.6 per cent.

The hotel industry in the European market: steady occupancy rates vs. price pressure

In a comparison with the leading European travel destinations in the international market, Germany's hotel industry held its own in 2025 amid increasingly fierce competition. Germany saw a slight increase in occupancy rates, as did France, Italy, Switzerland, Spain and Austria.

There is a clear correlation across countries between steeper price rises and slower growth in occupancy rates.

Overall, MKG Consulting reports a slight year-on-year increase in occupancy rates of 0.9 per cent across all segments of the German hotel industry at the end of 2025, with growth in the higher price categories marginally stronger. At the same time, the average room price in Germany fell by 2.8 per cent across the year to €110.20. MKG noted significant price reductions of 4 per cent in mid-range hotels, which are also likely the result of one-off effects from UEFA EURO 2024.

Modal split in travel: rail on top

A look at the modes of transport used by Europeans to travel to Germany presents a mixed picture in 2025. Rail stands out as the only mode of transport to have recorded growth (6 per cent) and thus continued to gain in importance.

Travel by car and travel by coach saw a slight fall of 2 per cent and 4 per cent respectively. Air travel saw an even bigger drop of 7 per cent and thus lagged significantly behind the overall trend.

Consumers reward strong image with high desire to travel

Germany once again enjoyed an excellent image. In the Anholt Nation Brands Index (NBI), Germany maintained its second-place ranking in a comparison of 50 countries – behind Japan and ahead of Canada, Italy and Switzerland. As in previous years, Germany leads the field of 30 European countries included in the NBI.

Particularly relevant for Germany as a tourist destination are its consistent ranking of 10th in the 'tourism' indicator and an improvement in the 'culture' indicator, rising from 6th to 3rd place compared with 2024. As in the previous year, 'historic buildings' and 'vibrant cities' are key factors shaping Germany's positive image in the rating of tourism-related aspects.

A custom NBI analysis conducted on behalf of the GNTB showed that tourists around the world primarily associate Destination Germany with brand attributes such as engaging, exciting and educational, followed by relaxing and romantic. When it comes to the expectations of

culturally minded international travellers to Germany, cultural heritage, local traditions and food and drink rank highest, followed by impressive architecture, art, museums, festivals and multicultural and music events.

Germany's excellent image is the basis for the country's consistently strong appeal as a holiday destination. Travellers who decided to visit Germany are satisfied with their experiences, according to the Quality Monitor survey of the German tourism industry (January to October 2025).

1.99
Overall satisfaction

1.93
Choice and quality

1.99
Accommodation

1.97
Food & drink

2.0
Opening times

1.97
Value for money

Scale of 1–6
(1 = delighted, 6 = disappointed)

This, in turn, leads to a high recommendation rate. The metric used to gauge this, the net promoter score (NPS) measured on a scale from –100 to +100, was 45 points in 2025.

Other travel trends in 2025:
Stay longer, book directly

Longer stays are increasingly popular among European holidaymakers visiting Germany. The number of stays of at least four nights increased by 2 per cent in 2025 compared with 2024, while the proportion of short stays of up to three nights fell by 7 per cent. Overall, the average length of stays in Germany continued to increase to 6.7 nights, rising by 2 per cent compared with 2024 and by 6 per cent compared with pre-pandemic levels (6.3 nights) over the medium term.

There was a further shift in 2025 in terms of bookings. Direct bookings are on the up, with a rise of 53 per cent for transport operators and 11 per cent for accommodation providers. At the same time, online bookings fell by 2 per cent, while travel agents remain under pressure with a fall of 7 per cent.

Bavaria is still the most-visited federal state in terms of international overnight stays

Bavaria	18.9 %
Berlin	11.0 %
Baden-Württemberg	10.9 %
North Rhine-Westphalia	10.4 %
Hessen	6.5 %
Rhineland-Palatinate	4.5 %
Lower Saxony	3.6 %
Hamburg	3.4 %
Schleswig-Holstein	1.9 %
Saxony	1.8 %
Brandenburg	1.0 %
Mecklenburg-Vorpommern	0.9 %
Thuringia	0.5 %
Saxony-Anhalt	0.5 %
Saarland	0.5 %
Bremen	0.5 %

Travel industry trusts in the resilience of Germany's tourism offering

The GNTB Travel Industry Expert Panel, a quarterly survey of up to 250 key accounts and CEOs of companies in the international travel industry that sell Germany as a destination, shows the volatility of the markets over the course of the year.

At the end of the year, the Expert Panel confirmed the resilience of inbound tourism to Germany from the perspective of the travel industry, with 56 per cent of respondents viewing their current business situation in the fourth quarter of 2025 as positive, an increase of 8 percentage points on the third quarter. 53 per cent of respondents expect their business in Germany to continue to grow in the period from December 2025 to May 2026, a rise of 15 percentage points compared with the third quarter of 2025. The Business Climate Index for Germany, based on the current business situation and the expectations, climbed 14 points to 55 in the last quarter.



Barrier-free activities
on the East Frisian
island of Langeoog
in Lower Saxony



02

INTERNATIONAL ACTIVITIES
of the GNTB

In the reporting year, the GNTB focused on activities that strengthen Destination Germany in the market, unlock potential for the national economy and boost the country's image as a destination worldwide.

A range of innovative, sophisticated business intelligence tools created the foundations for targeted marketing strategies. Digital innovations provided the means to efficiently implement them in cooperation with a strong network of partners in travel to Germany and the international travel trade. The GNTB used a variety of formats to share its ever-growing expertise with its partners.

Whereas global theme-based campaigns showcased the facets of Destination Germany's brand, the campaigns run by the foreign representative offices and sales and marketing agencies presented Germany's tourism offering to market-specific demographics of potential customers.



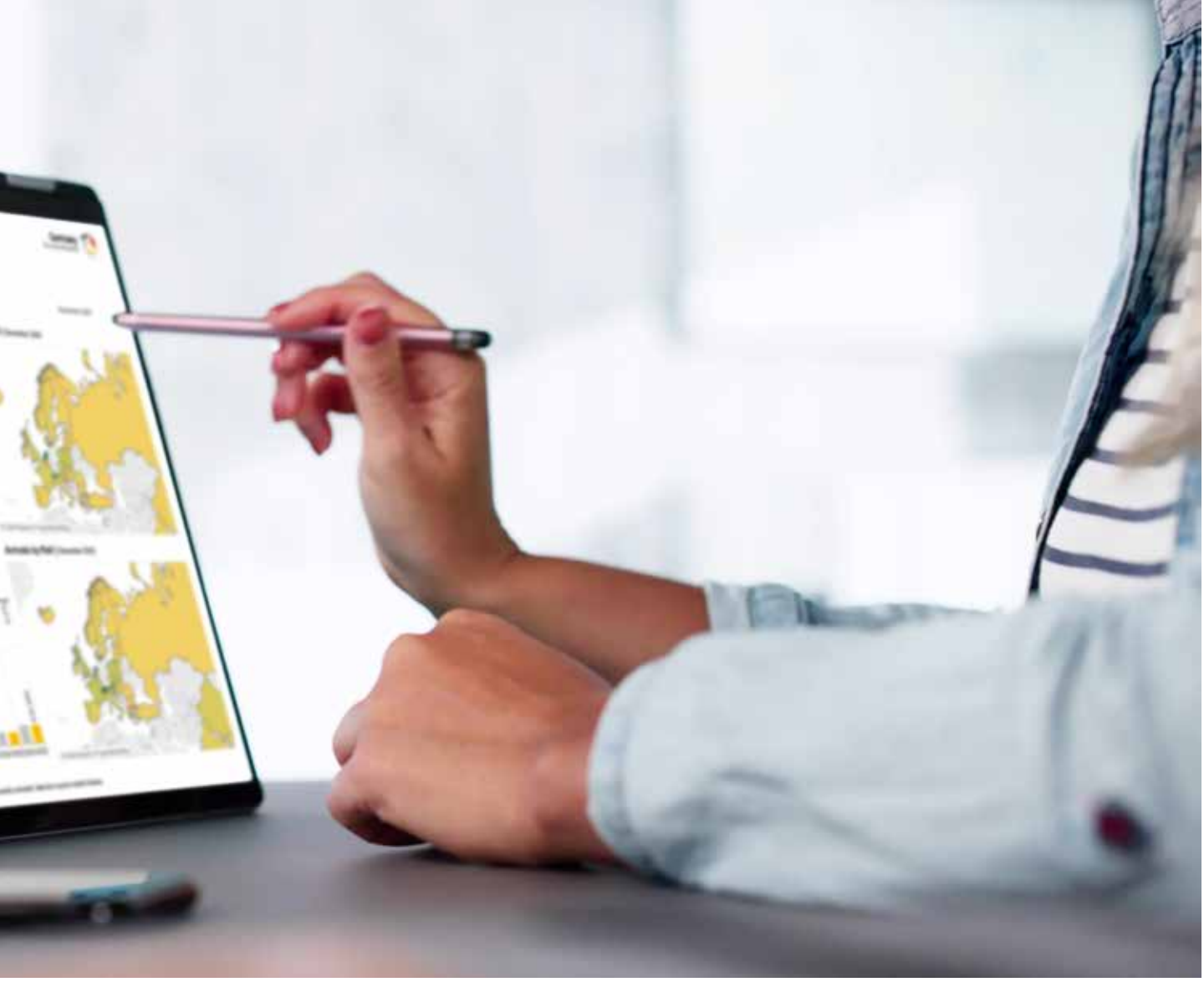
Innovation and future-proofing

Further work on key areas of action

The GNTB defines focal areas for the ongoing digitalisation of processes across all departments and divisions. These are shaping the organisation's entire value chain, from market research and the development and implementation of marketing tools to the communication with end customers.

Business intelligence optimises forecasts

In line with its digital strategy, the GNTB further refined its analytical tools for evidence-based



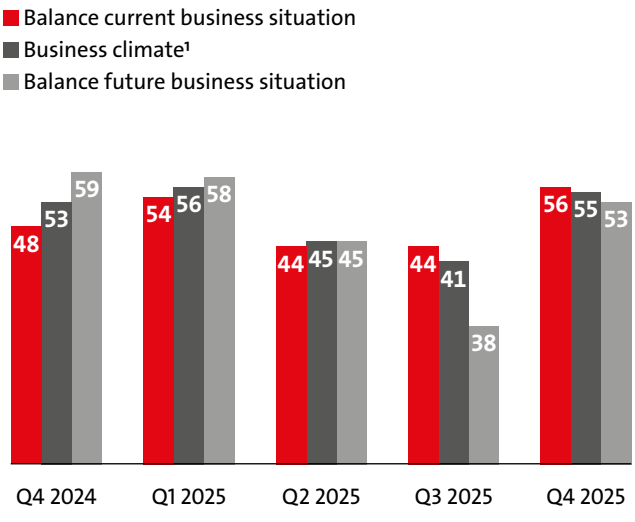
business decision-making. These are presented in the three data dashboards

- Inbound Travel Trends to Germany
- Sustainable Travel Trends to Germany
- Business Travel Trends to Germany

The dashboards give access to over two million tourism-related data sets, including credit card revenue, mobile phone data, flight data, and hotel data, thus providing a solid basis for strategic planning. New features are the display of point-to-point connections between 150 international departure airports and German destination airports, and monthly updates on arrivals and overnight stays in 78 cities.

In addition to collecting, analysing and presenting data, it is the personal assessments of market players that are important in volatile markets. For example, the GNTB uses its Travel Industry Expert Panel, which leverages the expertise of 250 CEOs and buyers of international tour operators in 33 markets that sell Germany as a destination, to provide an indicator of the business situation now and for the six months ahead. The GNTB uses this as the basis for its Business Climate Index for inbound tourism to Germany.

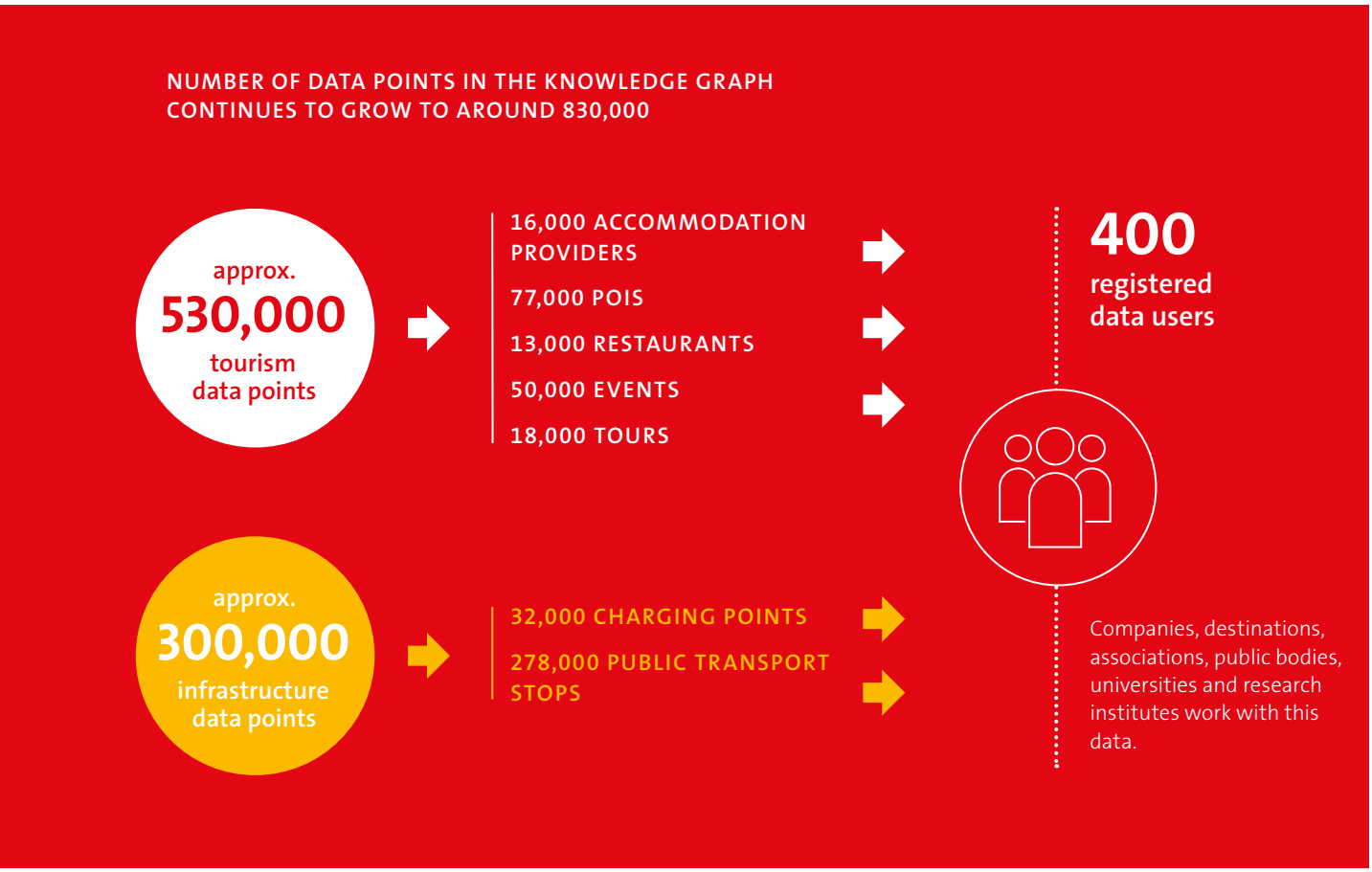
BUSINESS CLIMATE FOR GERMANY SURGES 14 POINTS AS BUSINESS EXPECTATIONS STRENGTHEN



¹The business climate is based on a combination of the balances for the current and the future business situation, value range +100 to –100.

Source: GNTB Travel Industry Expert Panel, Q4 2024 to Q4 2025, n = 184–212, reference months December 2024; February, May, August, December 2025.

Note: From Q1 2025, experts from the following markets were no longer surveyed due to an adjusted market situation: Sweden, Finland, Hungary, Slovenia, Canada, Norway.



In order to keep the panel participants motivated and acquire new ones, the GNTB developed a loyalty programme and certificate in 2025.

The regular optimisation of the inbound tourism forecast on the basis of various data sources enables the GNTB and its partners to continually refine their marketing activities:

- Business expectations from the GNTB Travel Industry Expert Panel
- External forecast institutes (Tourism Economics)
- Short-term indicators based on mobile phone data
- Trends based on ForwardKeys data (Total Air Market in the future)
- Expertise of the GNTB's foreign representative offices and sales and marketing agencies
- Use of AI-based computational forecasts

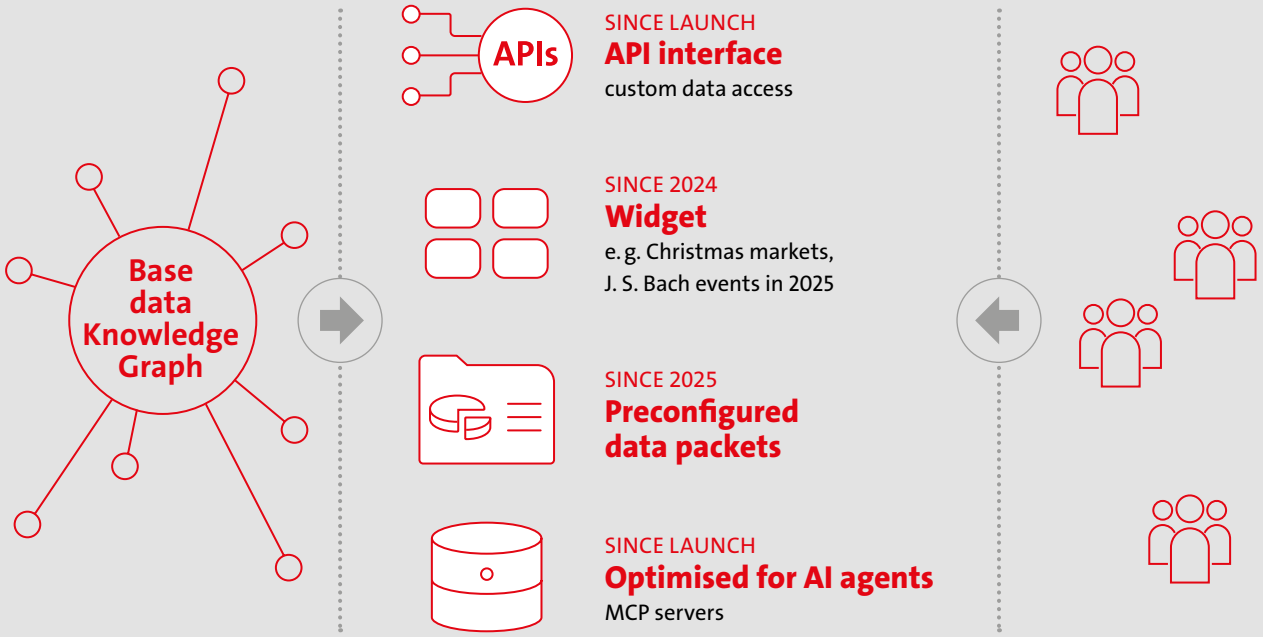
This data is particularly invaluable for small and medium-sized enterprises in the tourism sector when it comes to defining the strategic focus of their international business activities. The GNTB therefore introduced an option in 2025 that allows members to have data from official statistics, forecasts and source-market analyses prepared according to their specific requirements.

Digital transformation speeds up business processes

The GNTB's activities in 2025 focused on a competitive data infrastructure as a prerequisite for the development and implementation of AI applications across the entire tourism sector, from inspiration and booking to personalised services during the trip.

Qualitative refinement of the GNTB Open Data/ Knowledge Graph project
Analyses by the foreign representative offices show that the GNTB Knowledge Graph puts Germany in a very strong position in the international market. While tourism-related data on transport, accommodation and arrivals is recorded in almost all markets that were reviewed, Germany – alongside Austria, Switzerland and France – excels when it comes to data on points of interest and on infrastructure. This proves the worth of having a centralised data strategy and reflects the high level of maturity in terms of standardisation and technology.

NEW ACCESS OPTIONS TO KNOWLEDGE GRAPH DATA INCREASE DATA USAGE



GNTB projects using data from the Knowledge Graph (KG)

After the GNTB had compiled data on more than 2,000 Christmas markets in Germany for its annual 'Season's Greetings' campaign for the first time in 2024 and distributed this information via various partners in European markets, further event widgets containing details of current relevant events were introduced as part of the global 'Cultureland Germany 2025' campaign.

A large language model based on KG data was integrated into the B2C chatbot on germany.travel. Emma, an AI-generated travel companion, picks up on the widespread popularity of AI influencers in Asia and the Americas and will operate in future with data from the Knowledge Graph. An outdoor widget is in development in 2026 covering the key theme 'Family & Friends'.

As part of their global marketing efforts, the GNTB's foreign representative offices launched several successful open-data projects through partnerships with start-ups and travel portals.

Key strategic objectives included:

- Raise the profile, and improve the reach, of tourism offerings
- Overcome language barriers with the help of an AI-based translator
- Ensure legal certainty through authorised data from each service provider
- Provide inspiration for new programme items / topics, for example adding new stop-overs to multi-destination tours
- Expand the portfolio of offerings for partners across all sectors, for example by linking outdoor equipment stores with tour suggestions

→ See also 'The GNTB's international activities' on page 36 onwards

Technological progress through MCP technology

In 2025, the GNTB finished linking the Knowledge Graph to the MCP (model context protocol) technology. This live interface enables structured access to and retrieval of data from a variety of large language models (LLMs), and is compatible with language modules such as ChatGPT, Perplexity and Gemini, and with the Knowledge Graph. This increases the speed of data retrieval as well as the quality and efficiency.

Open data ensures secure use across sectors and organisations, even at European level, as well as reliable data sharing.

ODTA steps up European collaboration on tourism data standards

Since it was established in 2023, the Open Data Tourism Alliance (ODTA), a European alliance for the standardisation of semantic data models for tourism content, has developed a total of 24 domain specifications in stages based on schema.org as a common standard language.

This is how data of particular relevance to tourism, such as information on infrastructure, attractions, points of interest, events, certifications, tourist information centres, nature reserves and protected areas, walking routes and sports facilities, is integrated into the structure of the datasets. In conjunction with new technological standards such as RAG (retrieval-augmented generation) and MCP (model context protocol), this enables faster and more accurate retrieval of information and allows for offerings to be targeted at specific audiences.

In order to address the growing requirements of the travel industry and better meet customer expectations, the ODTA revised its organisational structure at the request of the GNTB in 2025. By expanding communications and encouraging greater involvement from all partners, the aim is to raise the profile of the ODTA, attract new partners, and embed the importance of open, semantically structured data models in tourism more firmly within tourism organisations across Europe.

Shaping the future through innovation, inclusivity and an international outlook

The GNTB's strategic focus on high-quality, forward-looking and service-oriented tourism maintains the balance between the needs of the economy, the environment and society. In line with the targets set by the federal government, the GNTB worked on a wide range of initiatives and projects aimed at preparing Destination Germany for the future.

For example, it continues to promote inclusion as an essential component of the Destination Germany brand in the international market and as an indicator of quality and customer focus for people with temporary or permanent disabilities.

The GNTB used a variety of formats to share the findings of international trend analyses, insights from research and examples of best practice for developing high-quality, forward-looking and service-oriented tourism with its network partners.

In 2025, the GNTB worked with Visit Britain and MMGY on a representative multi-client survey to provide solid base data for improved accessibility and transport options for people with disabilities. International organisations, associations and companies such as ENAT, WTTC, Tourism Ireland, Sage Inclusion, Wheel the World, Ottobock, Aria Wheels and TravelAbility were involved in the implementation.

Reliable, cross-border data on the scale and economic importance of accessible tourism, and on the specific requirements in both the leisure travel and business travel segments, is now available. The results of the survey were presented for the first time during Accessible Tourism Day at the 2026 ITB.

→ Further information on the networking activities Destinations for All, Accessible Tourism Day and Sustainable Tourism Day can be found in the 'Network and knowledge sharing' chapter from p. 28 onwards

→ For information about activities relating to EMAS certification, Green Globe certification and the implementation of the European EmpCo guideline see the 'Making inbound tourism more sustainable' chapter from p. 130 onwards



Digital applications in GNTB marketing

Innovative ideas meet new technologies

To showcase Germany as an innovative, attractive and high-quality travel destination, the GNTB launched further digital applications in 2025 that feature, for example, immersive technologies (virtual, augmented and mixed reality), conversational interfaces (e.g. voice assistants) and gamification.

Increasingly, these tools are key to inspiring end consumers to visit destinations and their tourist attractions.

Users who travel using a VR headset today are tomorrow's potential visitors

@EmmaTravelsGermany has her finger on the pulse

Over the last two years, virtual influencers have firmly established themselves in international marketing strategies. The rapid evolution of AI applications allows lifelike avatars to provide assistance and makes it possible to consolidate an ever-increasing volume of information from a growing number of sources.

The launch of AI influencer Emma in October 2024 created quite a stir across the sector. By 2025, Emma had proven herself to be a reliable and credible travel companion with a likeable persona. At the same time, the project generated a lot of international attention for the GNTB, and its implementation was recognised with the German Brand Award.

→ See p. 52 onwards for more information

Emma's own Instagram Story generated more than 75 million impressions and 9.2 million interactions in 2025.

As a travel companion on germany.travel, the chatbot now uses the GNTB Knowledge Graph for its base data.



GNTB presents UNESCO World Heritage up close in new mixed reality app

The GNTB's new mixed reality app, developed in 2025, provides an innovative way to showcase Germany's 55 UNESCO World Heritage sites and bring the destination's cultural and natural treasures to life in an interactive way. The technological leap forward was the integration of a digital app into the user's real-world environment using the latest generation of VR headsets (Meta Quest 3 and PICO).

The GNTB's UNESCO Experience app features 360-degree panoramic views for a hyper-realistic feel and provides access to themed routes and the GNTB's online media (www.germany.travel, YouTube, Facebook etc.). The app was made as accessible as possible.

The GNTB also uses this tool during B2B events run by head office and by the foreign representative offices. The UNESCO World Heritage sites use the app in tourist information areas and during events. End consumers who have a virtual reality headset can download the app for free from the Meta app store.

The GNTB has incorporated the app into Lufthansa's in-flight entertainment system, making it the world's first national tourist board to integrate a VR application into this system. This represents a real milestone in digital travel marketing.

Grimm's Quest gamification app draws visitors to the German Fairytale Route

As part of its '50 years of the German Fairytale Route' theme, the GNTB developed the Grimm's Quest app, which combines gamified storytelling with travel tips. It features five of the best-known Grimm fairytales (Little Red Riding Hood, Frog Prince, Rapunzel, Snow White, Hansel and Gretel) as digital mini-games that provide theme-based travel tips. This inspires users to explore the history of the Brothers Grimm and to discover the real-life locations of the magical tales for themselves. The app was initially promoted on the Facebook, YouTube, Instagram and TikTok social media channels, as well as on channels specific to China.

Within a few months, the app garnered numerous prestigious awards. For example, Grimm's Quest won the 2026 German Design Award in the 'Excellent Communications Design – Interactive User Experience' category. The German Design Award is bestowed by the German Design Council. At the Digital Communication Awards (DCA), Grimm's Quest was awarded gold in the 'Contest & Game' category and bronze in the 'Storytelling' category following an international pitch by the GNTB.

→ For more on the awards, see p. 103

→ Play now
www.germany.travel/
grimms-quest







Network and knowledge sharing

Business contacts in the international travel industry and in travel to Germany



ITB

2025 ITB – international tourism trade fair

The theme of the ITB Berlin, the world's leading tourism trade fair, in 2025 was 'The World of Travel lives here'. The GNTB was joined by its partners in the Deutschland-halle (Germany hall) in Hub 27 to send a strong signal for Destination Germany's appeal and ability to innovate.

The GNTB's ITB presence in 2025 at a glance

- Centrally positioned GNTB stand across more than 1,000 square metres featuring six regional tourism organisations (RTOs) and 31 secondary exhibitors
- 13 GNTB members and sponsors at the fair
- Six federal states in the adjacent RTO area
- More than 750 meetings with GNTB representatives
- Sector event: parliamentary evening as a networking event for political decision-makers, representatives from associations and organisations, RTOs, and companies
- RTO press conference with spokespersons from all regional tourism organisations

Key themes included the interactive presentation of the '50 years of the German Fairytale Route' theme via the virtual Grimm's Quest app on the stand. The themes '275th anniversary of the death of Johann Sebastian Bach', 'Chemnitz, 2025 European Capital of Culture' and 'AI travel companion Emma' were also showcased on the stand.



51st GTM Germany Travel Mart™

New GTM 360° format expands scope

In recent years, the possibilities and the challenges of B2B communications in tourism have evolved rapidly. Digital channels support the launch of offerings throughout the year and the adjustment of contract terms according to demand. Several new communication formats and channels were launched in order to share information and allow potential business partners to network.

87 % of participants satisfied or very satisfied

98 % made new business contacts

85 % plan to attend again

With this in mind, the GNTB revamped the traditional Germany Travel Mart™ from the ground up and merged it into the expanded GTM 360° format. The new structure brings Germany's tourism economy and the global travel industry together all year round, both online and offline. Furthermore, the in-person format was made more flexible so that, under the guidance of the GNTB, tourism offerings can be presented in a variety of ways and partners can be more closely involved in both the sales workshop and the supporting programme.

The in-person event in 2025 took place from 25 to 27 March in Bonn. The highlight was a two-day, carefully curated workshop at the Dorint Hotel Bonn, complemented by an exclusive evening event at the Steigenberger Icon Grandhotel Petersberg.

In a first, the GNTB chartered three river cruise ships operated by Scylla AG to transport key accounts from the international travel industry and high-profile media representatives from Frankfurt to Bonn through the Middle Rhine Valley.

The 2025 GTM 360° at a glance

- Dorint Hotel Betriebs GmbH and Deutsche Lufthansa as Premium Partners; Sixt SE as strategic partner
- 146 buyers in the international travel industry and 38 journalists from 32 countries
- 129 spaces for German providers fully booked by the end of 2024
- 3,200 meetings in total, of which 2,200 booked in advance via the digital booking system
- Five theme-based pre-convention tours, organised in cooperation with sponsors, focusing on landscapes shaped by human hand, winegrowing, historical towns, city trips, shopping and nature & sustainability
- International press conference with Dorint GmbH and Lufthansa AG for media representatives on board one of the river cruise ships



Brand summit

Tradition meets Innovation: Culture, Crafts & Culinary delights

A distinctive brand profile is essential, especially in the currently very volatile market. In 2025, the GNTB organised the fourth Incoming & Brand Summit to address Germany's established image values as a high-quality, service-oriented destination, as a hub for innovation and as Europe's cultural hotspot. The GNTB's summit format addresses a select circle of high-profile international journalists to familiarise them with Destination Germany's brand values in the current market.

The 2025 Incoming & Brand Summit at a glance

- 31 August to 2 September in Bayreuth
- 72 journalists from 21 international source markets
- Hosted by strategic partner Bayreuth Marketing & Tourismus GmbH (BMTG)
- Deutsche Lufthansa as official airline partner

Highlights on the conference day included keynote speeches by Petra Hedorfer, entitled 'Inbound Tourism – Why Destination Germany Stands Strong', and Justin Reid, Senior Director Media, Destinations, Hotels & Growth at online travel platform Tripadvisor, entitled 'Destination Germany: Where Inspiration Turns Into Experience'.

Using internationally known tourist attractions as examples, such as the Bayreuth Festival, which takes place for the 150th time in 2026, the Bayreuth Baroque Opera Festival and the local culture of brewing and winemaking, experts including tenor Klaus Florian Vogt, Jeff Maisel, managing director of the Bayreuth-based Maisel brewery, and award-winning chef Alexander Herrmann explained how they are innovatively re-interpreting traditional cultural values.

Participants could choose from five exclusive Bayreuth programmes that shone a light on the many facets of German cultural history and how they are perceived today. Three pre-convention tours explored, among other things, 'Tradition meets zeitgeist' in the Rheingau and Rheinhessen regions, 'Street art & urban culture' in Bavaria and accessible travel experiences in UNESCO-listed Regensburg and the Bavarian Forest.

Key findings

- German culture is not just preserved; it is re-imagined in modern formats and AI-based apps.
- Authentic experiences and quality attractions are a hit around the world, with German places of interest achieving above-average ratings of 4.32 stars on Tripadvisor.
- A new generation is re-imagining food and drink in innovative ways, from artisan beer brewing and winemaking to modern dining.



Accessible Tourism Day

At the ITB

Accessible Tourism Day is a major platform that brings together politicians, representatives from industry and disability associations to discuss the opportunities and challenges of accessible offerings, to showcase successful examples and to position Germany on the international stage as a destination with very good inclusive offerings.

The 2025 Accessible Tourism Day at a glance

- 5 March from 10.30am to 4.30pm in Messe Berlin's City Cube
- Hybrid event with 650 participants
- Brief speeches by Dr Abd Al Razaq Arabyat, managing director of the Jordan Tourism Board, and Kristy Durso, TravelAbility ambassador and founder of the Accessible Travel Network
- 19 speakers in total

Key topics included 'Where should accessible tourism be in 10 years' time?', AI-related opportunities and risks for accessibility, the German Accessibility Improvement Act, the future of the Travel for All label, a panel discussion on inclusive travel for children and young people, and a presentation on accessible experiences in the great outdoors.

Key findings

- Accessibility is increasingly important in urban spaces and rural areas.
- AI opens up new possibilities for navigation, inspiration and personalised services.
- Accessibility is a sign of quality that provides an overall boost to destinations.
- The German Accessibility Improvement Act is set to further accelerate the development of offerings.



Destinations for All

GNTB presents inclusion on international stage

Destination Germany has an exceptionally good reputation among accessibility experts. To reinforce this positive positioning, raise awareness of Germany as a destination with a wide range of inclusive offerings and forge new links within the community, the GNTB was a sponsor, exhibitor, speaker and presenter of the 'UNESCO World Heritage sites in Germany' mixed reality app at the third 'Destinations for All' World Summit on Accessible Tourism held from 5–7 October in Turin. With 300 participants from 25 countries, Destinations for All is one of the leading international industry events for accessible tourism.

Benefits

- High visibility as a platinum sponsor
- Strong interest and quality meetings at the stand
- Excellent feedback on the accessible MR app



Knowledge Days

Decoding tourism trends

To help its partners in the tourism industry to adopt new technologies, the GNTB organised the Knowledge Days event again in 2025. External experts used new technologies and consumer trends to provide inspiration and ideas for innovation.

The 2025 GNTB Knowledge Days at a glance

- 83 members, sponsors and partners
- Held 24 to 25 June in Bielefeld in partnership with Tourismus NRW e. V.
- Key topic of the two-day programme: use of artificial intelligence in digital and data-driven campaign marketing
- Social sparks & storytelling – brand ambassador Emma as an example of creating visibility the smart way
- Insights into the international source markets Switzerland, Denmark and the Gulf Cooperation Council (GCC) states
- Expert talks included Lufthansa's 'Next, New, Now' on new technologies in aviation and 'Short content, big impact' by TikTok

Key findings

- New travel trends arise quickly, such as 'passion travel' as the successor to 'revenge travel'.
- AI, digitalisation and open data are strategic factors in the success of efficient, personalised inbound-tourism marketing.
- Global diversity requires culturally precise marketing strategies and the latest content formats.
- The 'tech momentum' concept supports strategic investment decisions in new technologies.



GNTB meets members

Actively maintaining networks

Networking and close collaboration with members are central pillars of the GNTB's activities. The GNTB generates revenue by offering attractive participation options, for example in campaigns and market-specific marketing activities. In return, the partners gain access to international markets and benefit from the GNTB's technological expertise and deep understanding of the market.

Through its 'GNTB meets members' format, the GNTB systematically strengthens the relationship with its members and maintains a direct channel for dialogue and exchanging ideas between the organisation and tourism stakeholders in Germany.

During the meetings, the GNTB shares information about the latest developments, strategies, market trends and projects. Members provide feedback, formulate requirements and add their own perspective on upcoming programmes. The event thus supports joint marketing measures.



Sustainable Tourism Day

Thinking ahead

During the fourth edition of the format, experts discussed innovative ideas and concepts for high-quality, service-oriented tourism that enduringly balances the needs of the economy, the environment and society. The aim is to provide the foundations for solid economic value creation and ongoing future success.

The 2025 Sustainable Tourism Day at a glance

- In-person event on 4 September in Frankfurt am Main
- Around 80 participants, including experts from tourism, business and the political arena
- Opening speech by Dr Christoph Ploß, Member of the German Parliament, Federal Government Coordinator for the Maritime Industry and for Tourism

Key topics: digital twins, model-based system engineering, environmental and climate action in the accommodation sector, new sustainability metrics for travel to Germany, insights into sustainable travel and technological developments.

In-depth information and practical advice about the EU's EmpCo Directive, which aims to prevent greenwashing.

Key findings

- Digital twins enable the accurate simulation of sustainable destination strategies.
- Sustainable aviation fuel, efficiency technologies and digital innovations point the way to climate-friendly air travel.



US Advisory Workshop

US Advisory Workshop

Even in times of economic and political uncertainty, the USA remains by far the largest overseas source market for travel to Germany. The annual Advisory Board Meeting is the platform for networking and sharing knowledge with key players in the US travel industry.

The event in 2025, held in partnership with visitBerlin and Tourismus Marketing Brandenburg, provided in-depth insights into rapidly changing demand and booking trends among American travellers. This information is essential to the GNTB and its partners when it comes to defining their strategic focus.

The 2025 US Advisory Board Meeting at a glance

- Industry Day at the Waldorf Astoria Berlin on 15 October
- 105 delegates from German partners
- Representatives from the US travel industry, including Terry Dale, President & CEO, USTOA; CEOs and senior managers of Tauck, Exeter International, Globus family of brands, Kuoni Tumlare, Lufthansa, Rail Europe, Critics Choice Vacations, Best Travel LLC and Tripadvisor
- Keynote speech: Katie Briscoe, Chief Executive Officer, MMGY Global

Key findings

According to IPK, the US market was the biggest source market by revenue for inbound tourism to Germany, with travel spend of €10.4 billion, and generated significant added value for the predominantly small and medium-sized businesses of Germany's tourism industry.

Despite uncertainties relating to trade policy, a rise in demand was expected from the fourth quarter onwards. River cruises and multi-generational holidays are driving growth in customer demand, with the focus on authentic and cultural experiences. More than half of travellers specifically seek out local cuisine as a way to experience the local culture. Accordingly, the GNTB positions Germany in the US as a premium destination that offers cultural depth and high-quality experiences. The GNTB is placing even greater emphasis on culture and cuisine as key themes in its communications and is focusing more on luxury travellers with 5-star hotel offerings, exclusive cultural experiences and Michelin-starred dining. The customer journey is increasingly digital, with almost half of travellers already using AI-based tools.

Market insight webinars in 2025: Compact expertise for business development

The GNTB's market insight webinars provide its partners in travel to Germany with an established format for learning about the latest trends in international source markets in an efficient and targeted way. The webinars provide concise insights into trends, challenges and opportunities in international markets, and thus support strategic business development.

The heads of each foreign representative office present the latest figures, data and assessments for their markets.

17 events in total

12 European markets

5 overseas markets

1,037 participants in total

Working with external experts, they examine market-specific matters. This combination of market analysis, expert knowledge and examples of best practice gives participants invaluable insights that are not otherwise publicly available in this form. The market insight webinars play a vital role in providing up-to-date, evidence-based and practical support to partners in travel to Germany in a fast-moving and globally challenging environment.

GNTB members meet Spotify

On 12 February, the GNTB held an exclusive 'GNTB members meet Spotify' event in Berlin. Its aim was to open up new avenues for members, improve the focus on target groups and facilitate the development of innovative content formats. During the event, Spotify offered an inspiring glimpse behind the scenes of the world's largest streaming platform and gave an impressive demonstration of how the company uses data-driven insights to deliver highly targeted and effective campaigns. The 20 or so participants gained invaluable insights into the latest marketing strategies and inspiration for their future approach to tourism.

GNTB meets Spotify





Global marketing campaigns

GNTB campaigns focus on culturally minded tourists and nature lovers

Theme-based campaigns address trends in customer demand across the markets.

The GNTB draws on its in-depth market knowledge, analysis of global social trends and data on current changes in tourism demand to define the content guidelines for its theme-based marketing around the world. Campaign planning also incorporates a detailed target group analysis, expertise in digital transformation and a strong network of partners within travel to Germany and the international travel industry.

The GNTB addresses key aspects of global tourism trends with the two pillars at the core of its brand: 'towns, cities & culture' and 'nature & relaxation'. Germany's leading role as a destination for city breaks and cultural tourism, together with its broad offering of active and nature-based holidays, are key assets for setting trends across all markets and using innovative marketing tools to focus the attention of potential target groups on Germany.

The GNTB uses digital tools across its campaigns, including microsites, programmatic marketing, influencer trips and fact-finding tours, and trade and PR events with key players in the travel industry and the media. It also features its assets on over 40 social media channels.

The GNTB is always adding new tools to its marketing mix, including gamification, immersive apps and widgets that draw on data from the Knowledge Graph. The aim is to further enhance Germany's profile as a travel destination, build on its established strengths, open up new experiences for potential visitors and tap into growth opportunities.

Key areas of focus in 2025

A rich cultural heritage and a vibrant arts scene are significant factors for international tourists when choosing a travel destination. City breaks, culture and cultural heritage, and multi-destination tours consistently feature among the preferred types of holiday in the European Travel Commission's Monitoring Sentiment surveys. According to a survey conducted by Appinio on behalf of the GNTB, exploring cultural heritage and sightseeing are the most popular activities for culturally minded travellers worldwide, followed by experiencing local cuisine and visiting museums and galleries.

Interest in nature, mindfulness and authenticity remains exceptionally high. In fact, 'exploring nature' was one of the preferences mentioned most often by international holidaymakers in the Appinio survey conducted in August 2025.

Yet a clear attitude-behaviour gap remains. For example, 84 per cent of respondents in booking.com's Sustainable Travel Report (April 2025) considered sustainable travel to be important. And according to a survey conducted by IPK International in September 2025, 74 per cent of respondents stated that a lack of sustainable offerings could be a reason not to visit a destination. But only 30 per cent had already booked sustainable offerings.

In respect of global themes such as culture, nature-based experiences, authenticity and responsible travel choices, Germany scores highly with its exceptionally diverse offerings. These enable it to provide regular visitors with new reasons to return through targeted campaigns while tapping into the potential of new visitors.

The global campaigns are complemented by thematic focal points such as internationally noteworthy anniversaries and events. Market-specific campaigns draw on the interests and needs of customers in the source markets and translate these into effective marketing activities.



Cultureland Germany

Internationally, Germany is perceived as a destination with a broad cultural offering. In the 2025 Anholt & Co. Nation Brands Index (NBI), Germany's image with regard to culture is ranked third in a comparison of 50 countries. A custom analysis of the NBI for the GNTB shows that Germany has plenty to offer culturally minded travellers, including the heritage and history of its regions and cities, local traditions, food and drink, urban landscapes and architecture, and a vibrant arts and entertainment scene.

According to IPK, Germany has been the top cultural tourism destination worldwide for European travellers for ten years. Of the 190 million culture-focused trips made by Europeans, 20.9 million trips were to Germany – a market share of 11 per cent. But Germany faces stiff competition from established destinations like France (10 per cent), Spain and Italy (both 9 per cent). In 2025, the GNTB presented an updated version of its successful 'Cultureland Germany' global campaign aimed at maintaining and expanding this strong position.

Germany cherishes its rich cultural heritage and strives to continually nurture it.

Campaign focus and implementation

'Cultureland Germany' showcased Germany as one of Europe's great cultural hubs and as synonymous with cosmopolitan diversity. In this context, the public artistic and cultural scene is an indispensable aspect of the quality of urban life, serving as a forum for direct communication and social discourse. Enjoying culture brings people from different nations together and allows them to explore new experiences.

Four cluster themes provided potential customers with an overview of the many facets of cultural tourism in Germany: 'art' showcased the diversity of art and cultural museums, as well as the foundations and art academies where emerging artists from all over the world come to study. 'Design' encompassed the arrangement of public spaces, ranging from historic town centres and 20th century architecture to innovative art installations. 'Music' provided a platform for outstanding festivals, ranging from classical to pop, and for Germany's world-leading opera venues. 'Wine' combined the appeal of winegrowing regions that have evolved over time with traditional seasonal wine festivals and the innovative creations of young winegrowers.

Global activities

- Implemented events widget
- Incorporated data on partners and regional tourism organisations from the Knowledge Graph
- Linked the key themes 'Chemnitz, Capital of Culture', 'Bach' and 'German Fairytale Route'
- Audience-specific, user-generated content in the GNTB's social media channels
- Programmatic marketing and email marketing
- Fact-finding tours, influencer trips and accompanying press activities

→ For information on other market-specific activities, see p. 54 onwards

MICROSITE

315,057 organic page views

PAID SOCIAL MEDIA

32.6 m impressions overall

PROGRAMMATIC MARKETING

87.9 m impressions overall

EMAIL MARKETING

199,155 contacts

40.95 % unique open rate

PRESS

296 activities

937 articles

1.98 bn reach

FACT-FINDING TOURS

56

SELECTED MARKET-SPECIFIC ACTIVITIES

Netherlands: Kultursalon in Utrecht • **UK:** 3D campaign in Outernet London • **Austria:** '100 years of Bauhaus Dessau' cross-media campaign • **France:** culture section with Time Out • **Czech Republic:** TV production Regensburg • **China:** OTC campaign with Ctrip Dessau • **Italy:** GNTB exhibition during Milan Design Week



Embrace German Nature

Nature and relaxation are firmly enshrined in Destination Germany's core brand, based on an exceptionally broad offering of holidays in the great outdoors. About a third of Germany's land area enjoys special protection, including 16 biosphere reserves, 16 national parks and 104 nature parks. There are also three UNESCO Natural World Heritage sites of international importance. All regions of the country are readily accessible via a well-maintained network of marked cycle trails and footpaths.

When it comes nature-based holidays, Germany is in second place in the IPK International ranking of destinations for Europeans travelling worldwide, behind Austria and ahead of France. According to the Quality Monitor survey of the German tourism industry, 29 per cent of foreign visitors cite 'landscape and scenery' as the deciding factor in their choice of travel destination.

In 2025, the GNTB relaunched its successful 'Embrace German Nature' campaign from 2023 with the aim of

The campaign showcases both well-known natural landscapes and previously little-known natural gems.

unlocking further potential in this market segment. By relaunching the campaign, the GNTB emphasized Germany's commitment to nature-based holidays and to longer stays.

Campaign focus and implementation

The primary aim of this inspiration campaign was to increase awareness of Germany's unmistakable natural landscapes among potential visitors to Germany. The campaign focused on options for experiencing Germany's iconic natural highlights in an authentic and individual way, and on discovering the country's hidden natural gems.

Drawing primarily on features such as rail, coach and public transport options, cycle trails and footpaths, as well as regional cuisine, the GNTB campaign highlighted the wide choice of nature-based tourism offerings and the engaging experiences that holidaymakers can expect. At the same time, the campaign promoted the idea of extending the length of stay.

Global activities

- Global rollout via social media and email marketing
- Market-specific OTC campaigns and events
- Natural beauty up close on fact-finding tours and influencer trips
- High reach through comprehensive media activities

→ For information on other market-specific activities, see p. 54 onwards

MICROSITE

245,633 organic page views

PAID SOCIAL MEDIA

52.6 m impressions overall

EMAIL MARKETING

139,735 contacts

39.47 % unique open rate

PRESS

149 activities

591 articles

4.1 bn reach

FACT-FINDING TOURS

23

SELECTED MARKET-SPECIFIC ACTIVITIES

UK: digital campaign with OTA Lastminute.com • **Denmark:** film project with biologist Vicky Knudsen • **France:** media collaboration with Chilowé and video with influencer Coflocs • **India:** campaign with Bollywood stars Huma Qureshi and Malaika Arora • **Spain:** family influencer trip along the German Fairytale Route



SIMPLY FEEL GOOD

Nachhaltige Erlebnisse in Deutschland

The interplay of economic, environmental and social aspects is a recurring element when designing the GNTB's global, theme-based advertising campaigns.

Customer interest in sustainable travel options has risen steadily in recent years. According to a survey by IPK International in September 2025, 74 per cent of respondents worldwide stated that a lack of sustainable offerings could be a reason not to visit a destination, while 75 per cent said they intended to travel more sustainably over the next twelve months.

The GNTB is promoting a broad offering in this campaign to address customer demand. The lead campaign 'Simply Feel Good' shines a light on destinations and offerings that have been certified as sustainable.

The GNTB uses ‘Simply Feel Good’ to present Germany as an attractive destination for travellers who value certified sustainability standards.

Campaign focus and implementation

Germany offers a growing selection of certified travel options. The GNTB campaign introduces certified travel destinations and accommodation providers that feature on the ECOTRANS map with their respective certifications. The continuation of the ‘Feel Good’ campaign aims to reinforce the ‘simply inspiring’ brand message via relevant certifications.

The information campaign demonstrated how to plan a varied and engaging holiday with certified offerings, whether city-based or in the heart of nature. Every featured destination and offering was based on independently verified certifications. The aim was to further enhance Germany’s international standing as a destination with a wide variety of certified offerings and create incentives to extend the length of stay.

Global activities

- Market-specific promotional activities via social media, SEA, programmatic marketing, OTC campaigns and newsletters
- Landing page updated with original music and a selection of images
- Integrated interactive map featuring more than 1,500 accommodation providers with recognised sustainability certificates
- Multilingual carbon calculator powered by myclimate, including an offsetting option

→ For information on other market-specific activities, see p. 54 onwards

MICROSITE

143,011 organic page views

SOCIAL MEDIA PAID

145.8 m impressions overall

EMAIL MARKETING

176,919 contacts

33.49 % unique open rate

PRESS

134 activities

328 articles

1.2 bn reach

FACT-FINDING TOURS

14

SELECTED MARKET-SPECIFIC ACTIVITIES

Austria: content hub on the sustainability-oriented website insiderei.com • **China:** OTC campaigns on the Klook platform with a focus on Hong Kong • **France:** collaboration with Voyage Privée • **USA:** cross-media TV campaign with CTV agency VDX.tv



Season's Greetings from Germany

Germany is known throughout the world for its Christmas customs and traditions. And that is appreciated by representatives of the international travel industry, with 88 per cent of respondents on the GNTB Travel Industry Expert Panel (fourth quarter 2025) perceiving Germany as a strong or very strong destination for Christmas markets, and 75 per cent including Christmas markets in their product portfolio.

The GNTB has provided inspiration for holidays to Germany during the festive period through its 'Season's Greetings from Germany' campaign since 2020. The Christmas campaign provides a significant boost to city breaks and cultural tourism, and also supports retailers and the hospitality and hotel sectors.

Campaign focus and implementation

The 2025 campaign focused on combining inspiration, international relevance and innovative technological implementation through the use of artificial intelligence. The centrepiece of the campaign strategy was a visually

Christmas customs known around the world – inspiration for a holiday in Germany during the festive season.

striking, emotionally engaging promotional video featuring elements generated entirely by AI. The GNTB's AI influencer Emma provides the link between the future, technology and inspiration.

In 2024, a digital element was added to the campaign with a widget featuring over 1,000 Christmas markets in Germany. As part of the 2025 campaign, additional data sets on more than 3,700 traditional Christmas markets were collected and made available in the GNTB's Knowledge Graph.

Global activities

- Content expanded on landing page and widget featuring more than 3,700 Christmas markets integrated
- Campaign video, Xmas Spotify playlist and Christmas recipes integrated
- Campaign assets rolled out via programmatic marketing, social media (YouTube and Facebook), SEA and newsletters
- 13 partners involved, including Premium Partner Thüringen Tourismus GmbH

→ For information on other market-specific activities, see p. 54 onwards

MICROSITE

1.5 m organic page views

PAID SOCIAL MEDIA

89.1 m impressions overall

PROGRAMMATIC MARKETING

83.8 m impressions overall

EMAIL MARKETING

286,193 contacts

27.43 % unique open rate

PRESS

67 activities

125 articles

3.8 bn reach

FACT-FINDING TOURS

7

SELECTED MARKET-SPECIFIC ACTIVITIES

France: DOOH campaign with changing designs in Paris and Lyon • **China:** market-specific initiative with nine operators • **Denmark / Spain / USA:** international cross-market campaign featuring Christmas market calendar

Key themes for 2025

Two further themes were communicated to the media, to the trade and to end consumers as part of market-specific activities, primarily to support Germany's positioning as a destination for art and culture.



In 2025, the GNTB made the 275th anniversary of the death of Johann Sebastian Bach a key theme. Johann Sebastian Bach (1685–1750) is without doubt one of the most influential composers of the baroque era. The focus was on locations closely associated with his life and legacy, including Erfurt, Weimar, Köthen and Leipzig. The aim was to raise awareness of the anniversary and inspire travel to these locations in the culture segment.

Implementation

- Theme page in four languages (DE, EN, FR, ES)
- Six travel tips for places associated with Bach
- Search widget allowing international visitors to search for festivals, concerts and exhibitions related to Bach. The widget was based on data from the Knowledge Graph.

The GNTB also put together a Spotify playlist to induct visitors into the world of baroque music. As well as popular pieces by the great composer, it included Bach-influenced songs and interpretations of his oeuvre by leading rock and pop acts.

Five audio stories on the life of the great baroque composer, entitled 'Bach decoded', were also produced. These were published on Spotify with AI-generated covers.



This key theme focused on 50 years of the popular German Fairytale Route. It links various places and regions associated with the life of the Brothers Grimm and their much-loved children's stories. A dedicated content page on www.germany.travel included a map featuring eight travel tips for key locations related to the Brothers Grimm. A video exploring four further visitor attractions was also incorporated.

Implementation

Theme page in four languages (DE, EN, FR, ES)

- Content page with information about the German Fairytale Route in the form of a map on the theme of 'in the footsteps of the Brothers Grimm' featuring eight POIs along the way
- The page also included a teaser for the gamification tool (own URL)

A highlight of the key theme was the new gamification app 'Grimm's Quest'. Combining gaming and education into a virtual fairytale journey, the app brings the fairytales to life in a fun and engaging way, linking magical mini-games with relevant background information and details about the region.

→ For more on the 'Grimm's Quest' app, see pages 27 and 103

Johann Sebastian Bach

MICROSITE

9,833 organic page views

PAID SOCIAL MEDIA

50.3 m impressions overall

EMAIL MARKETING

68,239 contacts

42.6 % unique open rate

PRESS

76 activities

122 articles

235 m reach

FACT-FINDING TOURS

7

SELECTED MARKET-SPECIFIC ACTIVITIES

Czech Republic: widget on landing page with OTA turistika.cz • **Japan:** Bach widget on 4travel.jp

50 years of the German Fairytale Route

MICROSITE GERMAN FAIRYTALE ROUTE

39,488 organic page views

MICROSITE GRIMM'S QUEST

1 m organic page views

PAID SOCIAL MEDIA

187.7 m impressions overall

EMAIL MARKETING

184,505 contacts

41.6 % unique open rate

PRESS

124 activities

494 articles

773 m reach

FACT-FINDING TOURS

12

SELECTED MARKET-SPECIFIC ACTIVITIES

Japan: exhibition in Tsutaya Daikanyama bookshop • **USA:** influencer trip • **Poland:** Grimm gamification on Meta



High reach through cross-media communication

Targeted use of online and offline media

Corporate communications ensures a continuous flow of information from the GNTB to various stakeholder groups, such as the media, industry professionals, partners in the political arena, the domestic and international travel industry, and many other key players. It also coordinates numerous press and PR activities of the international offices.

The GNTB uses a range of social media channels and press information for online and offline media to provide updates on the latest activities, market research insights and relevant statistical data. Extensive background information, market-specific analyses and classifications are presented in blog posts, podcasts, interviews and editorials. In-house publications are produced to support the sharing of knowledge across the GNTB network. Fact-finding tours for partners in the trade, press tours and influencer trips offer authentic impressions of Destination Germany.

In addition to the strategic area of digital transformation in inbound tourism, the GNTB focused its communication activities in 2025 on global campaigns, key themes and markets with particularly high potential.

Traditional press and PR work at international level

	Number	Total reach
Press releases	315	–
Press newsletters	169	72,000
Press conferences	24	396 million
Press briefings	524	5.4 billion

Increased B2B communication on social media
The GNTB used its LinkedIn, X and Facebook accounts to provide the latest news about its activities and to share market research data and information about current trends in the international travel industry.

21,300
followers on LinkedIn

41,200
engagements

144
posts

305,000
impressions

PR events

Incoming & Brand Summit
This GNTB event format is specifically targeted at a select group of high-profile trade journalists in order to interactively discuss the Destination Germany brand values in the current market.

The theme of the media summit, which took place in Bayreuth from 31 August to 2 September, was ‘Tradition Meets Innovation: Culture, Crafts & Culinary Delights’.

→ For more information about the Incoming & Brand Summit, see p. 31

PR events
The GNTB uses PR events to present key themes to media representatives and stakeholders in the international travel industry in a targeted and market-specific way.

45
PR events

321
publications

4.2 bn
reach

GNTB publications in different formats

'On the MIC with Petra Hedorfer' podcast
In her podcast, the GNTB's CEO talks to professionals from the international travel industry, key players and experts about Destination Germany and provides invaluable insights into the tourism business.

Germany's top hotels – hospitality as the key to success
International visitors to Germany can look forward to quality travel experiences featuring luxury hotels with personalised guest management and award-winning cuisine. In this episode, Petra Hedorfer talked to Frank Marrenbach, CEO of Althoff Hotels, about the developments and trends currently shaping the luxury hotel sector, and the strategies the industry is employing to tackle current challenges.

The future of transport – how Deutsche Bahn keeps tourism moving
Having a transport system equipped to face the challenges of the future is key to the success of a tourism destination. Rail travel is synonymous with convenience and choice, as well as with climate action and sustainable development. Petra Hedorfer talked to Stefanie Berk, former board member with responsibility for marketing and sales at DB Fernverkehr AG and member of the GNTB Board of Directors, about the role that Deutsche Bahn plays in the international visitor journey, how digital innovations are changing the travel experience and what marketing strategies are effective in attracting international visitors.

Europa-Park insights – 50 years of enterprise, innovation and experience management
Europa-Park has been embracing entrepreneurial vision, sustainable development and forward-looking strategy in the leisure sector for over 50 years. In this episode, Petra Hedorfer talked to Dr Roland Mack, founder and managing director of Europa-Park.

Dr Mack offered insights into managing a family-run business, the importance of digitalisation and sustainability, and the founding European idea that shapes Europa-Park to this day. An inspiring conversation about courage, the willingness to innovate and the successful strategy of a leading family-run business in the German tourism industry.

Simple, digital, without borders – how Rail Europe is redefining European transport
Rail Europe, one of the world's leading independent rail aggregators, brings 250 rail companies together on one platform – simple, digital, without borders. More than



25,000 B2B partners worldwide access the technology, and five million tickets sold annually are proof of robust demand. In this episode, Petra Hedorfer talked to Björn Bender, CEO of Rail Europe, about the Renaissance of rail travel, rising international demand and Germany's role as one of the fastest-growing markets. How is technology changing the industry? Why is convenience more important than ever? And how do you ensure that rail travel is a convenient, digital and sustainable travel experience?

From tradition to transformation – digital opportunities for SMEs in the hospitality industry
Digitalisation, AI and changing visitor expectations are transforming the hospitality industry. In this episode, Petra Hedorfer talked to Thomas Winkler, CEO of easybooking.eu, about digital opportunities for family-run businesses in Germany. What is the key to a successful switch from pen and paper to smart tools? And why is face-to-face interaction still irreplaceable? An inspiring look at digitalisation, generational changes and the future of hospitality.

The 'From the desk of Petra Hedorfer' blog

Inbound tourism in 2025: on course in rough seas
The first quarter of 2025 clearly showed how much international tourism is influenced by global developments, both economic and geopolitical. Ongoing uncertainty is impacting on consumer behaviour and business decisions, and is leaving its mark on inbound tourism to

Digital transformation, global campaigns and high-potential markets at the heart of corporate communications

Germany. Despite these challenges, Destination Germany is positioning itself in the market with the help of a data-driven strategy, strong international partnerships and innovative marketing in order to provide a lasting boost to Germany's appeal as a destination.

Annual report

Inbound tourism in 2024:
digital – sustainable – forward-looking
The GNTB's annual report provided a clear and concise assessment of Destination Germany's position in the international market. It laid out the GNTB's successes in innovations management, knowledge sharing and global marketing activities. In the third section, the GNTB, political decision-makers and partners from the federal states analysed the outlook for inbound tourism to Germany.

Progress report on sustainability

Making tourism more sustainable
The third edition of the progress report on sustainability showed the GNTB's activities aimed at systematically aligning all of its corporate activities with the sustainable development goals (SDG). It also explained how the requirements of the EMAS environmental certification were met.

Fact-finding tours

The GNTB provides the latest information about tourism offerings in Germany through its extensive programme of press and fact-finding tours.

The GNTB organised eight trade tours – three pre-convention tours for the GTM and five individual projects – for representatives of the international travel industry in 2025.

87
participants

20
countries

Group press tours organised across markets covered global theme-based campaigns, key themes and familiar core themes. In addition, individual press tours covered content and themes that are relevant to the specific markets.

In 2025, 249 media representatives from 30 countries took part in 26 group press tours, of which two were pre-convention tours for the GTM and three in the run-up to the Incoming & Brand Summit. 300 journalists reported on their experiences during individual press tours.

382
publications

12.2 bn
reach



Digital-first

End customers addressed directly via social media

The use of innovative communication tools on social media and targeted influencer marketing are central elements when it comes to directly addressing end customers in the international source markets. The wide-ranging portfolio, which includes market-specific communication channels, the innovative interactive formats and the use of cutting-edge technologies, including artificial intelligence, allow for the tone to be tailored to the particular audience and ensures a high reach.

Personalised responses from the Guidegeek chatbot

In 2025, the GNTB enhanced its digital services with the new LLM-based conversational interface. The chatbot is available on www.germany.travel, WhatsApp, Facebook and Instagram, and uses the content of the website and data from the Knowledge Graph to provide relevant, personalised content. The improved user navigation provides inspiration and guidance in the early stage of travel. Ongoing monitoring safeguards the quality of the interactions and facilitates further refinement.

Growing reach for Emma

The AI project featuring the travel companion Emma was noticeably more relevant in international tourism marketing in 2025. For example, her Instagram community has grown to almost 30,000 followers. On the technological level, Emma's high-quality features are synonymous with authentic storytelling; she now responds to her Instagram DMs automatically and offers personalised



travel tips. Emma was also integrated into the new campaign video for 'Season's Greetings from Germany', thus increasing her international visibility and reach.

The inclusion of Emma's content on market-specific platforms in China was a big success.

The GNTB used Emma in its B2B communications and during international trade conferences for the first time in 2025. → For further information, see p. 26

TikTok influencers promote cultural travel in Germany

As part of its global 'Cultureland Germany' campaign, the GNTB invited influencers from the UK, Spain, France, Poland and Italy to take culture-focused trips to Berlin, Ulm, Düsseldorf, Kiel and Mainz. At the destination, they enjoyed cultural highlights, the local atmosphere and authentic snippets of everyday life, and shared their impressions as TikTok content on their own channels as well as on the GNTB's TikTok channel. Hyatt and Deutschlandmuseum were organically integrated as Premium Partners.

5 influencers

20 posts

205 m impressions

The high number of impressions underscores the high visibility of the content and the success of raising awareness of Destination Germany. In addition, more than 528,000 link clicks to the landing pages of Hyatt and Deutschlandmuseum were generated.

'J. S. Bach Decoded' podcast project

The international audio project 'J. S. Bach Decoded' in 2025 was the GNTB's first AI-assisted podcast format aimed at digitally promoting culture. The five-part English-language series explored key stages of Bach's life in Eisenach/Ohrdruf, Arnstadt, Weimar, Köthen and Leipzig. It was conceived as a modern audio format that vividly tells the story of Bach's life using AI-generated voices, updated sound design and animated clips of the locations he is associated with.

'J. S. Bach Decoded' was promoted via Spotify and Meta in eight international source markets with a strong interest in the arts. The aim was to raise international awareness of the GNTB's annual theme, '275th anniversary of the death of Johann Sebastian Bach', through the use of visual and audio formats. The cross-channel strategy (Meta = screen attention, Spotify = ear attention) generated exceptional usage figures and strong demand in the target segment 'classical-music lovers'.

→ See key theme 'Bach', p. 46

17 m impressions overall

94–98 % completion rate for Spotify ads

11.85 m impressions on Spotify

6,128 podcast downloads

5.28 m Meta impressions

76,851 clicks on Meta links

Regional management North West Europe



20.7 m
overnight stays in 2025

– 3.4 %
year-on-year change

24.7 %
share of the German inbound travel market

Regional Management North West Europe covers five key source markets for inbound tourism to Germany, including three among the top ten. With more than 20 million overnight stays, they account for around a quarter of inbound tourism to Germany. Due to the presence of the Netherlands, Belgium and England at the European Football Championship, the ‘EUROs effect’ is particularly noticeable in this region.



NETHERLANDS

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+1.7 %
Rate of inflation	2025	+3.0 %
Level of international travel	2024	230 %

MOST POPULAR TRAVEL DESTINATIONS

#1	**Germany**	#3	France
#2	Spain	#4	Belgium

INBOUND TOURISM TO GERMANY FROM THE NETHERLANDS

Overnight stays	2024	11.9 million
Travel expenditure	2025	€4.2 billion
Overnight stays	2025	11.7 million
Change	Year on year	–1.5 %
Recovery	vs. 2019	101.9 %
Source market ranking		1

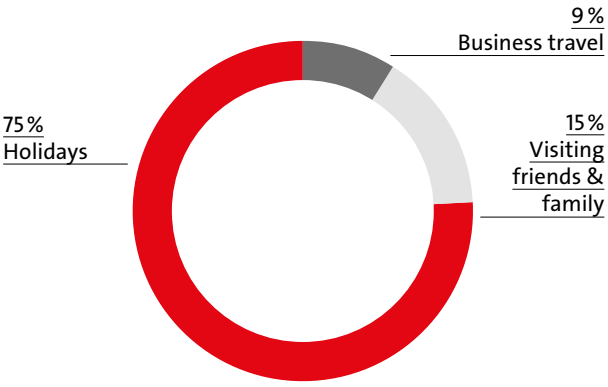
PROFILE OF VISITORS TO GERMANY FROM THE NETHERLANDS IN 2025

The Netherlands are a stable, strong source market with long-term positive trends in outbound travel. The one-off effects of UEFA EURO 2024 were particularly evident in the comparative figures for 2025. Going on holiday is still very important to the Dutch population despite the rising cost of living, a challenging housing market and public debate on climate action. In terms of destinations, there is a clear shift in preference towards long-haul tourism and new destinations (Albania, Slovenia, Scandinavia). Most visitors to Germany come from North Holland. The proportion arriving by car is above average, and 57 per cent are repeat visitors. City breaks and leisure and family holidays in the upland regions close to the border are hugely popular.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

71 % Visiting local attractions
67 % Going to restaurants/cafés
58 % Strolling around/exploring
40 % Walking
37 % Sampling local food and drink

TRIPS TO GERMANY BY MARKET SEGMENT

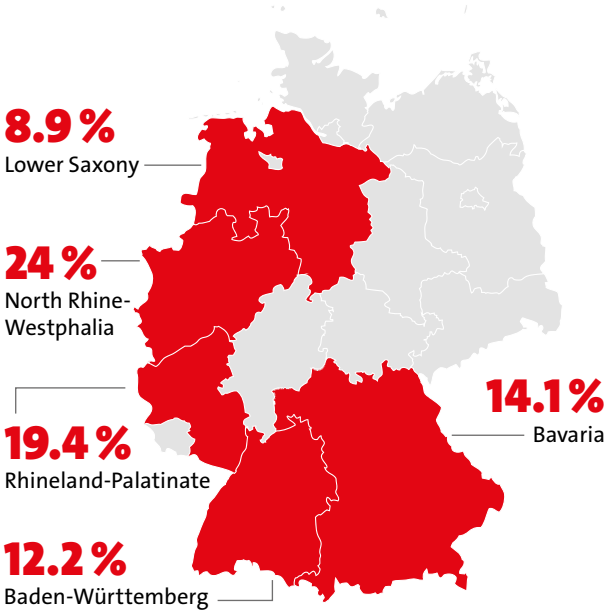


TOP CITY DESTINATIONS IN GERMANY

Berlin	6.7 %
Winterberg	3.4 %
Düsseldorf	2.6 %
Cologne	2.2 %
Munich	2.2 %

17.1 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **two-thirds of overnight stays** are in southern and western Germany.



THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Stay a little bit longer: campaign to position Germany as a convenient destination via the Nederlands Spoorwegen rail network.

360,000
reach with newsletter integration

2,894,659
impressions via social media activities

Season's Greetings from Germany: online campaign in collaboration with coach tour operator Oad to position Germany as a convenient and atmospheric destination for coach tours to Christmas markets • exclusive offer formats via Oad's own channels and high-reach channels such as cityzapper.nl and NRC • competition run via POS in Relay Stores in the Netherlands

Cultureland Germany: week-long, attention-grabbing Kultursalon event at transport hub Utrecht Centraal Station, including travel library, UNESCO VR offering, 'Grimm's Quest' presentation, wine tasting, readings and Bach events in partnership with Leipzig.

1,478
participants in the competition with partner integration

4,922,673
impressions for (D)OOH campaign in Randstad region

#DuitslandDichtbij: key year-long campaign specifically for the Dutch market with a dedicated campaign page and a flexible mix & match offering to promote Germany as a nearby, affordable, diverse and easily accessible travel destination.

FEEL GOOD 2025: combination of innovative, sustainable advertising media such as reverse graffiti on health stores, universities and train stations • 400 'FEEL GOOD' promotional banners using wipe-clean eco-colour • 115,000 seed-paper postcards in partnership with Saarland, and collaboration with sustainability media

PRESS AND TRADE

Travel market with 28 partners and 60 trade visitors, presentation of the Knowledge Graph • Regional workshop with visitBerlin with 13 partners and 38 trade visitors • Annual online press conference with 30 media representatives • PR workshop with 40 journalists on 9 September • ANTOR workshop with 40 meetings on 20 November

BELGIUM / LUXEMBOURG

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2023/24	+1.0 %
Rate of inflation	2025	+2.8 %
Level of international travel	2024	215 %

MOST POPULAR TRAVEL DESTINATIONS

#1	France	#3	Spain
#2	Netherlands	**#4**	**Germany**

INBOUND TOURISM TO GERMANY FROM BELGIUM / LUXEMBOURG

Overnight stays	2024	€3.1 million
Travel expenditure	2025	€1.8 billion
Overnight stays	2025	€3.1 million
Change	Year on year	+0.5 %
Recovery	vs. 2019	96 %
Source market ranking		9

PROFILE OF VISITORS TO GERMANY FROM BELGIUM / LUXEMBOURG IN 2025

Belgian travellers traditionally tend to plan their holidays several months in advance, but there has recently been a noticeable increase in last-minute bookings. Alongside the traditional border regions, Germany's northern states are growing in popularity. Many Belgians are opting for a single longer annual trip rather than several short breaks due to persistent inflation. The main source region for Germany is Flanders, followed by Brussels and Wallonia. There is strong interest in cultural attractions such as UNESCO World Heritage sites, museums and Christmas markets, as well as in nature and outdoor activities such as cycling holidays. Other reasons for travel include German Bauhaus architecture (Henry van de Velde), a strong interest in football (Vincent Kompany) and a preference for culinary experiences and quality.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

79 % Going to restaurants/cafés

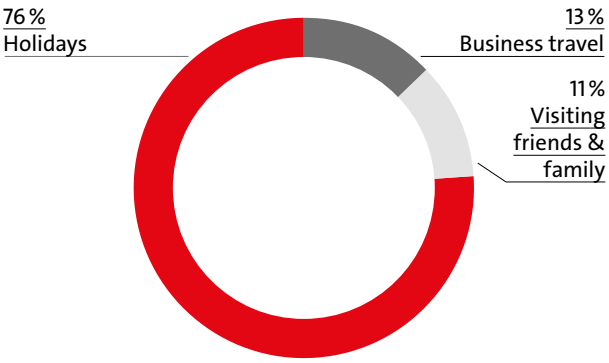
68 % Visiting local attractions

66 % Strolling around/exploring

42 % Sampling local food and drink

37 % Shopping (not for daily necessities)

TRIPS TO GERMANY BY MARKET SEGMENT

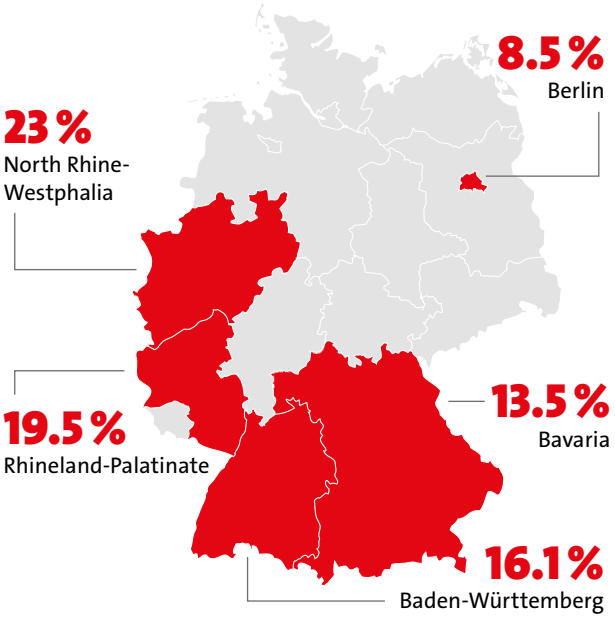


TOP CITY DESTINATIONS IN GERMANY

Berlin	8.5 %
Cologne	4.0 %
Munich	3.0 %
Düsseldorf	2.6 %
Frankfurt	2.5 %

20.6 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **80 per cent** of all overnight stays are in western and southern Germany.



OOH campaign Surprising Germany

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Cultureland Germany: production of a two-hour episode in the Neues Weimar museum on the topic of 'Henry van de Velde in Thuringia' with Premium Partners Thuringia and Weimar, broadcast during the 'Culture Club' culture-focused programme on Flemish public broadcaster VRT's Radio 1 station.

Bus/coach campaign: collaboration with the Federation of Belgian Bus and Coach Operators (FBAA): variety of advertorials in the federation's Car & Bus e-zine and print version, plus an advertorial in TravMagazine, Belgium's only B2B travel magazine.

Surprising Germany: out-of-home campaign in Brussels featuring interactive screens where passers-by could test their knowledge of Germany, plus accompanying PR campaign to present Germany's hidden gems to the press.

3,165
participants activating the offering

2,466,113
impressions (period: 10 Nov to 7 Dec)

PRESS AND TRADE

Market insights webinar on the differences between Flanders and Wallonia, and on accessibility • trade webinar in partnership with Bremen and Saarland • German week: GNTB involvement in annual German embassy event with the Goethe Institute, talk by the BGDV on Destination Germany's many facets, plus presentation on the German Fairytale Route for families with children • annual press conference with highlights in Germany over the coming year

UNITED KINGDOM

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+1.3 %
Rate of inflation	2025	+3.4 %
Level of international travel	2024	151 %

MOST POPULAR TRAVEL DESTINATIONS

#1	Spain	#3	Ireland
#2	France	**#8**	**Germany**

INBOUND TOURISM TO GERMANY FROM THE UK

Overnight stays	2024	5.3 million
Travel expenditure	2025	€4.4 billion
Overnight stays	2025	4.7 million
Change	Year on year	– 11.7 %
Recovery	vs. 2019	83 %
Source market ranking		4

PROFILE OF VISITORS TO GERMANY FROM THE UK IN 2025

International travel is firmly established in the UK lifestyle. But the UK population is very sensitive to the exceptionally volatile circumstances that currently prevail. Accordingly, the preference is for city breaks and mini-breaks using low-cost carriers. Germany is considered safe, big on culture and easily accessible, but faces stiff competition from other European city destinations. It is more likely to benefit from well-off middle and upper-class visitors, who are happy to pay for city breaks, multi-destination tours and high-quality cultural offerings. There are points of particular interest for cultural history tours, including memorial sites closely associated with 20th century events, as well as culture, the music scene, Christmas markets and the 'Romantic Germany' segment. There is a high level of digital affinity in a heavily fragmented market.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

85 % Going to restaurants/cafés

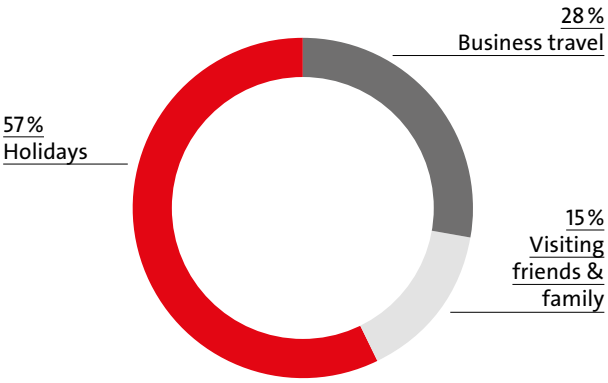
82 % Visiting local attractions

64 % Strolling around/exploring

51 % Visiting museums/exhibitions

51 % Sampling local food and drink

TRIPS TO GERMANY BY MARKET SEGMENT



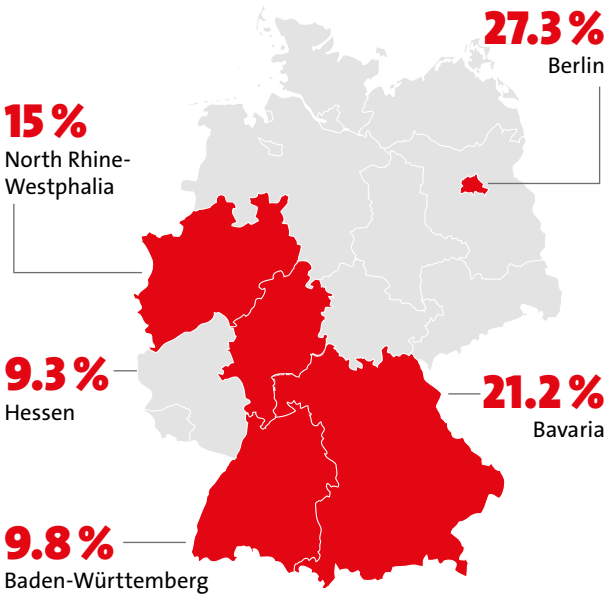
TOP CITY DESTINATIONS IN GERMANY

Berlin	27.3 %
Munich	11.4 %
Cologne	5.9 %
Frankfurt	5.8 %
Hamburg	5.3 %

55 %

of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



84 per cent of all overnight stays take place in just five federal states.



Immersive 3D OOH campaign ‘Cultureland Germany’

THE GNTB’S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Cultureland Germany: Immersive 3D OOH campaign in Outernet London, the UK’s largest cultural attraction, in partnership with Leipzig Tourismus • Showcasing Germany’s cultural highlights in a setting that perfectly reflects the significant role of out-of-home advertising in the UK market and guarantees maximum attention

Embrace German Nature: digital campaign with OTA portal Lastminute to showcase how easily accessible Germany’s natural landscapes are • campaign centrepiece was a map on which users could find inspiring experiences in the great outdoors • information on how easily and quickly these can be reached • plus newsletter integration and promotion on social media

Feel Good: digital campaign with leading travel publisher Culture Trip and campaign partners NRW Tourism and Münster Marketing, aimed at bringing authentic experiences in Germany to life for a culturally minded target group. Centrepiece was an inspiring campaign hub with articles, interviews with locals and the ‘Win a Feel Good Experience’ competition on social media.

Campaigns with Hilton and British Airways: combination of complementary campaigns to cover the entire customer journey (inspiration, flights, hotel), partners selected based on strong brand, reach and availability of bookable packages • implemented with conversion-oriented targeting in collaboration with programmatics platform Adara • use of image, video and social assets, call to action on joint landing page on Hilton.com

PRESS AND TRADE

ETOA destination exchange workshop on 2 and 3 June in London • speed networking with networking reception on 10 September at Blueprint London • exclusive webinar with Nuremberg on 12 November • events marking German Unity Day in London and Dublin • summer festival of the German language • German-British Conference and Oktoberfest • market insights • PR event with Nuremberg and Alexander Herrmann • press conference about the German Fairytale Route in partnership with the Black Forest region on 21 May • PR event with Berlin on the topic of design & architecture on 30 October • PR event ‘Christmas Magic in Germany’ with Saxony on 11 November • participation in the IMM London in February 2025 • media getaway in June 2025 • top editor dinner with 95 press briefings in total

Regional management North East Europe



11.3 m
overnight stays in 2025

– 4.4 %
year-on-year change

14 %
share of the German inbound travel market

Regional Management North East Europe is active in two of the top ten markets for inbound tourism to Germany: Poland and Denmark. As neighbouring countries and participants in UEFA EURO 2024, the one-off effect of the tournament was particularly noticeable.



POLAND

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+3.2 %
Rate of inflation	2025	+3.4 %
Level of international travel	2024	69 %

INBOUND TOURISM TO GERMANY FROM POLAND

Overnight stays	2024	4.2 million
Travel expenditure	2025	€5.3 billion
Overnight stays	2025	3.9 million
Change	Year on year	–7 %
Recovery	vs. 2019	111.3 %
Source market ranking		6

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany
#2 Spain
#3 Turkey
#4 UK

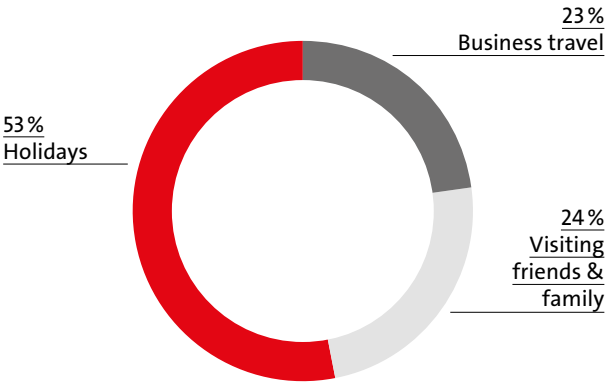
PROFILE OF VISITORS TO GERMANY FROM POLAND IN 2025

Poland's economy grew three times faster than the European average in 2025, with a corresponding rise in salaries and consumer spending. Geographical proximity and easy access add to the popularity of travel to Germany. Visitors primarily expect good value for money, easy booking and safe destinations. Demand for family-oriented offerings (theme parks, zoos, child-friendly hotels) is rising at an above-average rate. Active holidays (cycling and walking) are also right on trend.

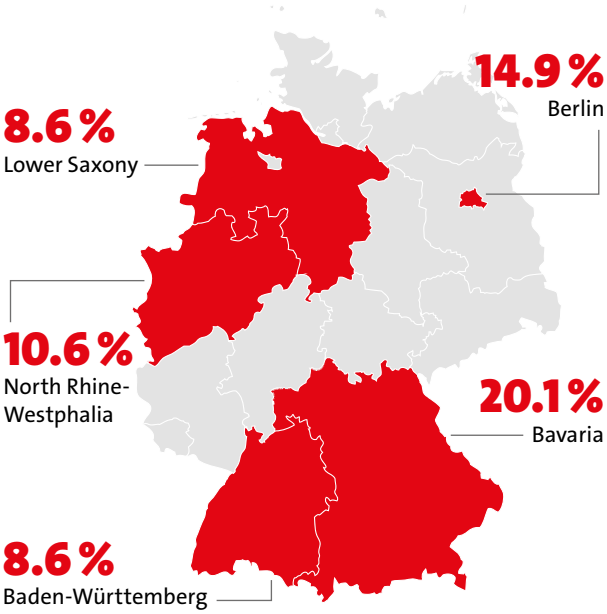
MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

77 % Visiting local attractions
74 % Going to restaurants/cafés
44 % Strolling around/exploring
34 % Sampling local food and drink
33 % Visiting museums/exhibitions

TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY



TOP CITY DESTINATIONS IN GERMANY

Berlin	14.9 %
Munich	4.8 %
Hamburg	2.8 %
Frankfurt	2.5 %
Dresden	2.4 %

27 %
of all overnight stays in the top 5 cities

Almost **two thirds of overnight stays** were in the southern and western federal states.



THE GNTB’S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Cultureland Germany: DOOH campaigns in Gdańsk, Wrocław, Poznań and Katowice, online content campaigns with culture-focused portals niezlasztuke and onet.pl • promotion of cultural highlights on culture-focused portals • social media activities and newsletter

7 partners **4** cities **25 m** contacts

314,000 views

Online content campaign on onet.pl incl. AI travel planner.

Influencer trip to Chemnitz, Capital of Culture, with travel report on YouTube • promotion of cultural highlights on culture-focused portals • social media activities on several platforms, plus newsletters for press, trade and end customers

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Cross-border tourism: D/OOH campaign with partner visitBerlin to promote cross-border tourism by rail • DOOH campaign and cinema advertising in several Polish cities • content advertorials on selected platforms

30 m contacts

Visit Northern Germany: cross-media campaign promoting city breaks, cultural tourism and active holidays on content hub niemcypolnoce.wp.pl and in the GNTB’s social media channels, DOOH campaign in Warsaw, plus PR event, individual press tours and influencer trip.

Embrace German Nature: collaboration with the veloplaner.pl cycle app, online content campaign on gazeta.pl, display campaign on polityka.pl and Spotify campaign.

PRESS AND TRADE

‘Visit Germany’ trade workshop in Krakow • premium hotel workshop with visitBerlin • workshop on Franconian cities in Warsaw • trade event with Mecklenburg-Vorpommern in Poznań • annual press conference • PR event with partners • press breakfast with visitBerlin

DENMARK

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+2.2 %
Rate of inflation	2025	+1.9 %
Level of international travel	2024	231 %

MOST POPULAR TRAVEL DESTINATIONS

#1	**Germany**	#3	Sweden
#2	Spain	#4	Italy

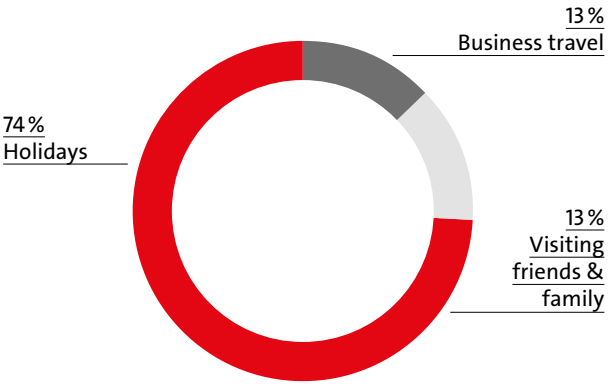
INBOUND TOURISM TO GERMANY FROM DENMARK

Overnight stays	2024	3.05 million
Travel expenditure	2025	€5.3 billion
Overnight stays	2025	3.0 million
Change	Year on year	– 2.9 %
Recovery	vs. 2019	86.7 %
Source market ranking		10

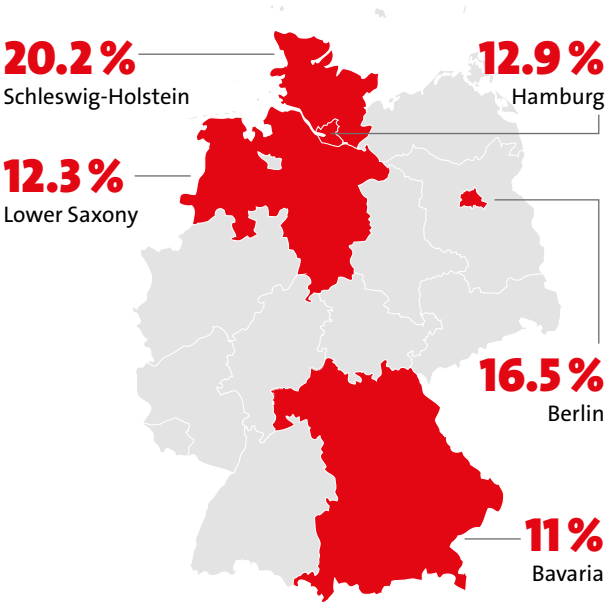
PROFILE OF VISITORS TO GERMANY FROM DENMARK IN 2025

High purchasing power and a strong desire to travel mean that short, frequent trips within Europe dominate Danish demand for outbound travel. In addition to traditional seaside and city destinations, countries with overland connections – primarily Sweden – and a strong tradition of holiday homes and camping are competing for the same target groups as Germany. Opportunities for Germany lie with high-income families, couples and over-50s who value safety, the outdoors, culture and good transport links by car, train or bus/coach, as well as digitally savvy, urban communities in and around Copenhagen, Aarhus, Odense and Aalborg. Online platforms and OTAs are experiencing above-average growth as Danish travellers value price comparisons, self-service options and flexible packages.

TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY



TOP CITY DESTINATIONS IN GERMANY

Berlin	16.5 %
Hamburg	12.8 %
Munich	2.7 %
Flensburg	2.5 %
Lübeck	2.2 %

36.7 %

of all overnight stays in the top 5 cities

More than **two-thirds of overnight stays** are in northern and southern Germany.



OOH campaign
Embrace German Nature

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Market-specific campaign 'Autumn holiday with the family': development of the tagline 'WOW-oplevelser in Tyskland for hele Familien', showcasing experiences, pleasant surprises and the added value of travelling to Germany as a family • via DOOH and shown in retail centres • displays with call-to-action competition on Jutland and Funen, two high-potential areas • Knowledge Graph-based collaboration with tour operators on the homepage in Danish

Embrace German Nature: collaboration with Spejder Sport, the largest outdoor equipment retailer, featuring mega displays in store windows and video screens at the tills • film project exploring the natural beauty of the Black Forest with renowned Danish biologist Vicky Knudsen • additional collaboration with Denmark's largest tour operator FDM on the theme of nature-oriented multi-destination tours in Germany

Cultureland Germany: OTC campaign with Momondo integrating data from the Knowledge Graph • exclusive podcast series of ten episodes about various German towns and cities, and the associated culture and history, on Denmark's second-largest podcast channel reached around 120,000 listeners • additional reach through advertorials, promotion on social media and DOOH activities

Simply Feel Good: author and activist Signe Wenneberg enjoyed a curated itinerary on a trip to Schmilka via Hamburg and Berlin in a VW camper van • content used in advertorials, lectures, articles in travel magazines published by Politiken and integration with Knowledge Graph data in tour operator Tryp's products

PRESS AND TRADE

38th North Europe Workshop in October 2025 • six B2B newsletters focusing on product innovations in Germany • workshop with Mecklenburg-Vorpommern • networking event with partners at the Tyske Filmdage, the Ferie for Alle trade fair and the PATA Christmas event • B2B workshop during the German Chamber Network's spring reception with Danish MICE companies, four German hotels and an inbound travel agency • 30 press releases, 25 press briefings on a variety of topics and eleven individual press tours

Regional management South East Europe



11.9 m
overnight stays in 2025

– 0.9 %
year-on-year change

14 %
share of the German inbound travel market

The markets that fall within Regional Management South East Europe differ considerably in terms of profile and performance. Regional heavyweight Austria remains the fifth-largest source market for inbound tourism to Germany, while the figures for overnight stays generally match those of the prior year. Romania continues to grow in importance.



AUSTRIA

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+0.3 %
Rate of inflation	2025	+3.5 %
Level of international travel	2024	238 %

MOST POPULAR TRAVEL DESTINATIONS

#1 Germany
#2 Italy
#3 Spain
#4 Croatia

INBOUND TOURISM TO GERMANY FROM AUSTRIA

Overnight stays	2024	4.4 million
Travel expenditure	2025	€3.7 billion
Overnight stays	2025	4.4 million
Change	Year on year	– 0.3 %
Recovery	vs. 2019	101.5 %
Source market ranking		5

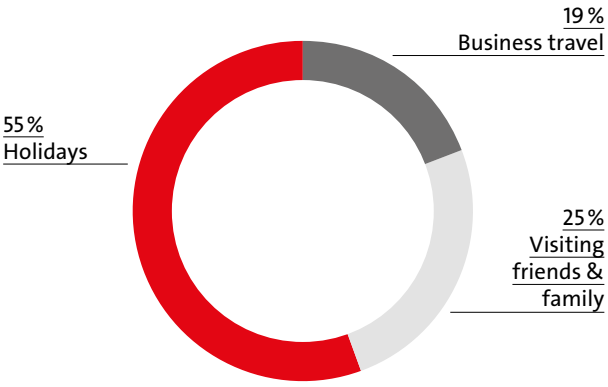
PROFILE OF VISITORS TO GERMANY FROM AUSTRIA IN 2025

Overall, the current economic situation in Austria is characterised by an economic slowdown, structural change and the transition to a sustainable economy. Particularly relevant for inbound tourism to Germany from Austria are visitors interested in culture and cities, and families and over-50s for whom sustainability, nature and mindfulness are important. For Austrians, ease of access is a key factor when choosing a destination. Although the car is the primary mode of transport, the proportion of rail travel is higher than the EU average. While there is a high level of digital affinity, the Austrian travel market retains a hybrid approach that combines traditional sales channels with online platforms.

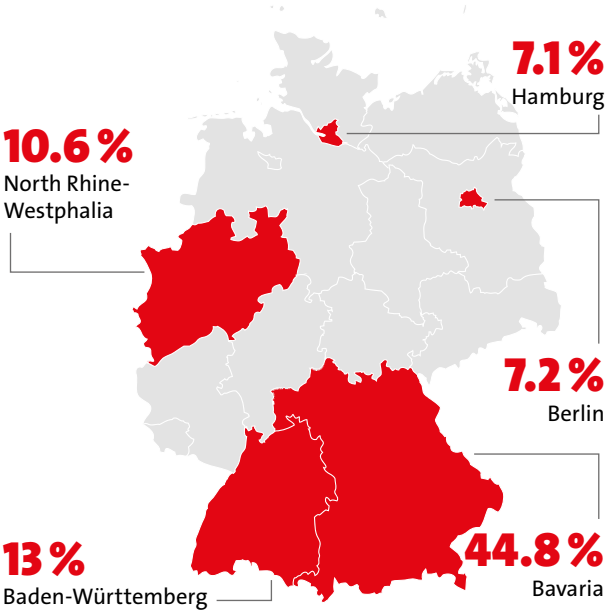
MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

88 % Going to restaurants/cafés
69 % Visiting local attractions
58 % Strolling around/exploring
48 % Shopping (not for daily necessities)
35 % Sampling local food and drink

TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY



TOP CITY DESTINATIONS IN GERMANY

Munich	11.6 %
Berlin	7.2 %
Hamburg	7.1 %
Frankfurt	2.2 %
Nuremberg	1.9 %

30 %
of all overnight stays in the top 5 cities

More than **three-quarters of overnight stays** are in southern and western Germany.



OOH campaign promoting Chemnitz, the 2025 European Capital of Culture, at Vienna's main train station

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Chemnitz, the 2025 European Capital of Culture: out-of-home advertising in the pedestrian tunnels between the underground trains and the platforms at Vienna main train station, aimed at target groups who like to travel by rail

123,500
passers-by per day at Vienna's main train station

3.8 m
reach

Embrace German Nature: DOOH campaign in Vienna in partnership with Sylt Marketing GmbH, plus online content on freizeit.at aimed at target groups interested in travel

Feel Good: native content campaign with content hub on sustainability-oriented platform Insiderei.com in collaboration with Change Maker Hotels

Cultureland Germany: online content campaign on freizeit.at, targeting people interested in the arts and in travel, using editorially refined advertorials collated in a GNTB co-branded content hub with twelve partners in two flights

100 years of Bauhaus in Dessau (as part of the Cultureland campaign): cross-media content campaign with media partner KURIER freizeit, print advertorial with online extension and cross-media promotion in the KURIER network (teaser and newsletter)

PRESS AND TRADE

Two-day Austria roadshow on 30 September in Vienna and 1 October in Linz with 14 German partners • annual press conference in Vienna presenting campaigns and key themes • two media brunches with several German partners in spring and autumn • partner events with Sylt Marketing on 15 January, with Berlin Tourismus & Kongress on 26 May and with Maritim Hotels on 6 June

CZECH REPUBLIC

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+2.4 %
Rate of inflation	2025	+2.3 %
Level of international travel	2024	123 %

MOST POPULAR TRAVEL DESTINATIONS

#1	**Germany**	#3	Italy
#2	Austria	#4	Slovakia

INBOUND TOURISM TO GERMANY FROM THE CZECH REPUBLIC

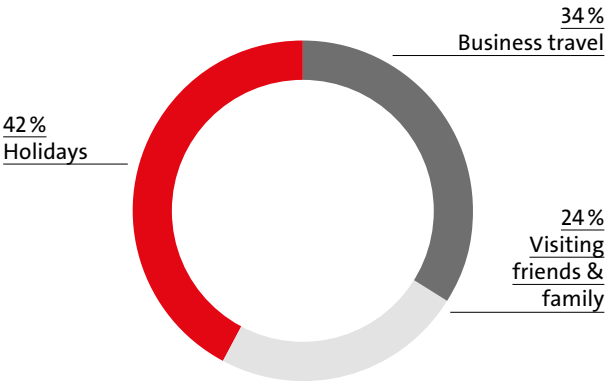
Overnight stays	2024	1.46 million
Travel expenditure	2025	€1.6 billion
Overnight stays	2025	1.4 million
Change	Year on year	–1.6 %
Recovery	vs. 2019	103.6 %
Source market ranking		15

PROFILE OF VISITORS TO GERMANY FROM THE CZECH REPUBLIC IN 2025

Positive economic figures are boosting the Czechs' appetite for spending and travel, and the appreciation of the Czech koruna is making trips abroad more affordable. Due to the complex historical and cultural ties and geographical proximity, Germany is the most popular outbound destination for Czech holidaymakers, with more than 40 per cent travelling to the neighbouring German states of Saxony and Bavaria. Holidays focused on wellness and on food and drink are a growing trend.

When it comes to bookings, traditional sales channels remain highly valued by consumers, although the market share of online platforms is growing, albeit from a low base. At the same time, the travel industry is developing and actively using an increasing number of specific tools for digital travel planning, such as an audio guide in the form of a mobile app – based on data from the GNTB's Knowledge Graph – and a website offering mapping services, which holds great promise for the GNTB's open data project.

TRIPS TO GERMANY BY MARKET SEGMENT

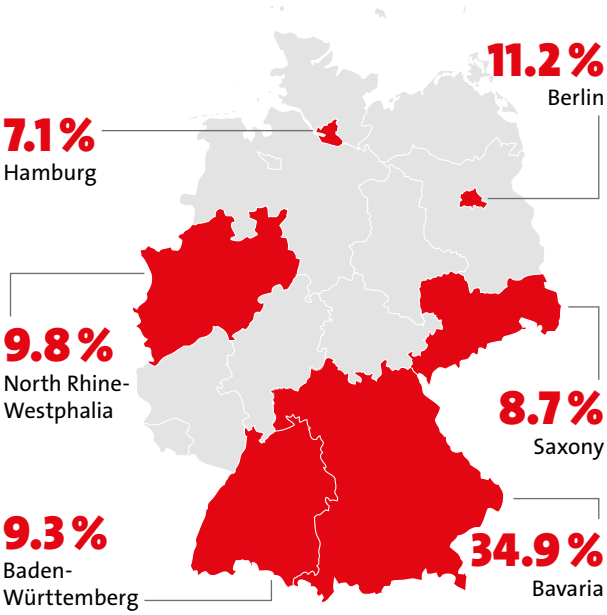


TOP CITY DESTINATIONS IN GERMANY

Berlin	11.2 %
Munich	6.5 %
Cologne	4.0 %
Dresden	3.1 %
Frankfurt	2.4 %

27.2 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **80 per cent of overnight stays** are in southern and western Germany.



OOH advertising in Prague featuring the 'Stay longer' campaign

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Stay longer: to significantly increase the number of overnight stays, particularly in late summer and autumn, the GNTB Prague office launched a cross-media campaign featuring DOOH advertising in Prague central station and in Prague city centre, combining a content campaign in the largest Czech online daily seznam.cz with a connected TV and social media campaign.

7.5 m
impressions on social media

66.65 m
impressions in the Czech Republic

55 m
impressions via content campaign

900,000
impressions on connected TV

Embrace German Nature: radio campaign with the Frekvence 1 station • total of 51 contributions to the programme, including nine live reports from the host's trip along the Elbe Cycle Route, plus 59 posts on social media generating 6.16 million impressions

275th anniversary of the death of Johann Sebastian Bach: landing page in collaboration with local OTA partner turistika.cz, integration of GNTB content and Bach widget; radio campaign with Radio Klassik and three concerts as B2C events with a presentation of sites associated with Bach, including his birthplace

Marketing collaboration with Czech Railways: campaign microsite with 3.5 million impressions, DOOH campaign in trains and at stations with 15 million contacts • two influencer trips with around one million impressions, plus 1.5 million impressions for connected TV campaign

PRESS AND TRADE

Annual press conference on 15 April presenting global GNTB campaigns • GNTB stand at the German Chamber Network's summer festival with more than 1,000 thought leaders, use of the 'Nature Experience in Germany' VR app • trade event in collaboration with Regensburg and BWH on 23 September • B2B workshop with six German partners and 25 Czech tour operators on 20 November • four influencer trips, one radio production and four TV productions

BALKANS

Source market at a glance

Romania, Croatia, Bulgaria, Montenegro, Serbia and Bosnia and Herzegovina

The regional office based in Belgrade serves six extremely promising markets in the Balkans. Economic growth is surging in the region, which is seeing a rising affinity with sustainable tourism. The positive economic momentum is boosting purchasing power and forging interest in travel among the region's target groups.

PROFILE OF VISITORS TO GERMANY IN 2025

Demand for outbound travel is generally stable or growing in all of the Balkan markets, but it is heavily influenced by economic conditions, purchasing power and price sensitivity.

A common feature of all these markets is their preference for nearby European destinations that can be reached by car or via short-haul flights. Value for money, last-minute deals and ease of access play a key role in travel decisions.

At the same time, there is a social and financial divide in outbound travel in several markets: while a section of the population that is able to travel undertakes regular trips abroad, a significant proportion remains unable to travel due to financial constraints. City breaks, short breaks and trips to visit friends and family are on the up, while longer and more expensive trips abroad are under pressure.

Romania's economy is currently dominated by rising inflation, leading Romanian travellers to increasingly base their decisions on price. There is a clear preference for three-star hotels, and air travel is growing in importance (up 6 percentage points year on year). Despite high digital affinity, customers still value travel agents.

Outbound travel from Croatia is characterised by a stable appetite for travel and a strong focus on pricing and deals. Leisure, relaxation and sightseeing dominate, while slow travel is an increasingly relevant trend.

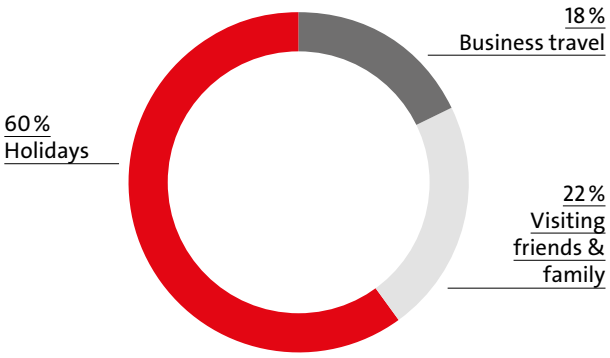
Outbound travel from Bulgaria is growing strongly with a focus on neighbouring countries and on Germany. The market is price-sensitive, with special offers and last-minute deals popular.

ROMANIA – THE DATA

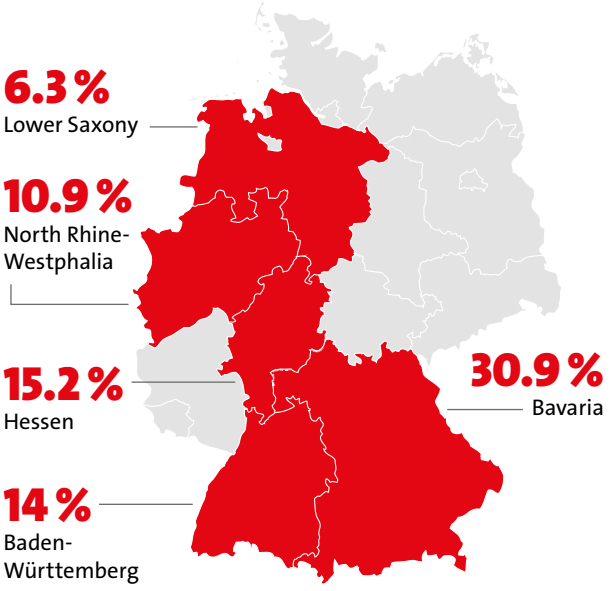
GDP	2024/25	+0.7 %
Rate of inflation	2024	+6.7 %
Overnight stays	2024	0.7 million
Travel expenditure	2024	€0.4 billion
Overnight stays	2025	1.5 million
Change	Year on year	5.0 %
Recovery	vs. 2019	128.2 %

Germany ranks number **4** among the most popular international destinations for Romanians.

TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY



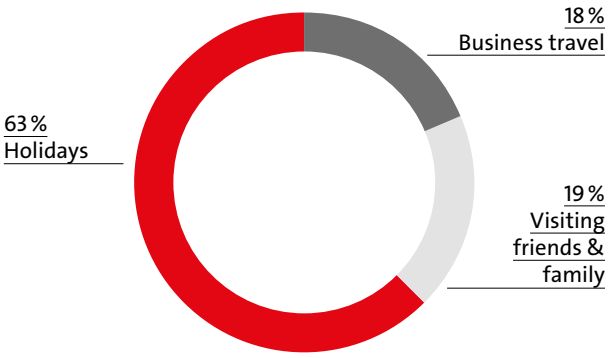
Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

CROATIA – THE DATA

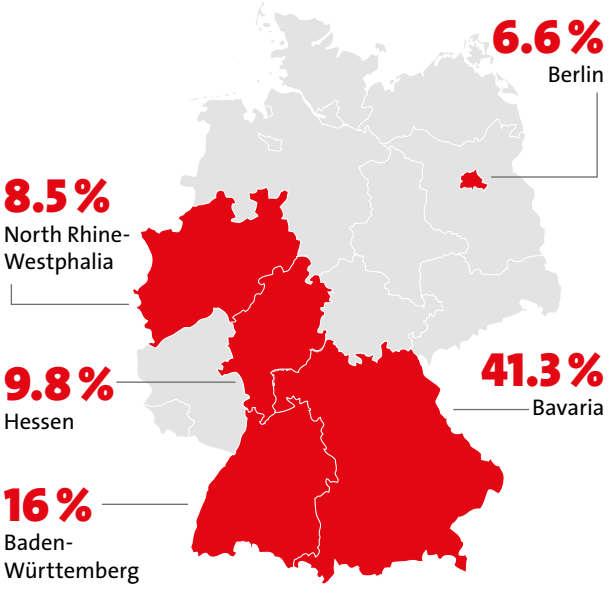
GDP	2024/25	+3.2 %
Rate of inflation	2024	+4.3 %
Overnight stays	2024	533,216
Travel expenditure	2024	€0.6 billion
Overnight stays	2025	499,538
Change	Year on year	–9.7 %
Recovery	vs. 2019	99.2 %

Germany ranks number **1** among the most popular international destinations for Croatians.

TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY

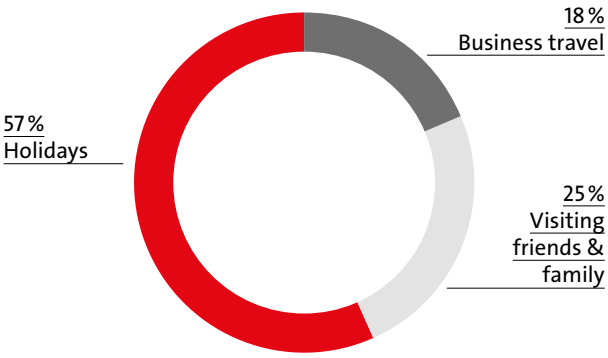


BULGARIA – THE DATA

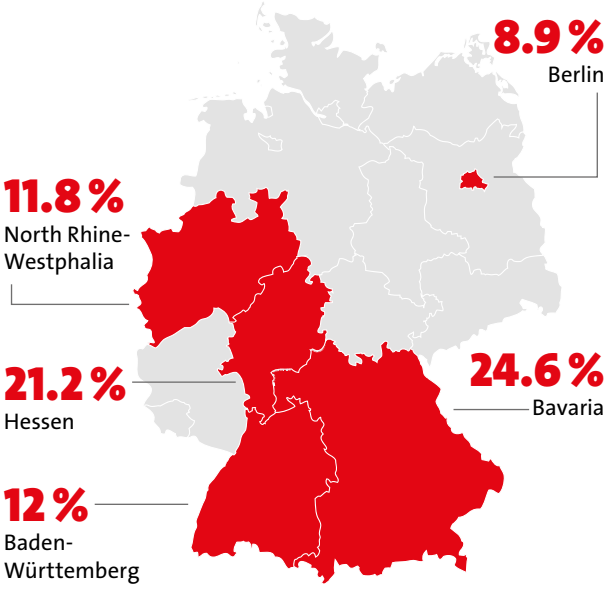
GDP	2024/25	+3.0 %
Rate of inflation	2024	+3.4 %
Overnight stays	2024	512,373
Travel expenditure	2024	€0.4 billion
Overnight stays	2025	509,946
Change	Year on year	–0.5 %
Recovery	vs. 2019	125.4 %

Germany ranks number **3** among the most popular international destinations for Bulgarians.

TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY



Regional management South West Europe



17.1 m
overnight stays in 2025

– 0.9 %
year-on-year change

20.5 %
share of the German inbound travel market

All of the countries in Regional Management South West Europe took part in UEFA EURO 2024 and reached at least the final 16. The influx of visitors from these countries was correspondingly high in 2024, and thus also the ‘EUROs effect’ in the comparative figures for 2025. Across all markets, southern Germany and the capital, Berlin, were right at the top of travellers’ wish lists.



SPAIN

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+ 2.9 %
Rate of inflation	2025	+ 2.6 %
Level of international travel	2024	65 %

MOST POPULAR TRAVEL DESTINATIONS

# 1	France	# 3	UK
# 2	Italy	**# 5**	**Germany**

INBOUND TOURISM TO GERMANY FROM SPAIN

Overnight stays	2024	2.7 million
Travel expenditure	2025	€2.7 billion
Overnight stays	2025	2.7 million
Change	Year on year	– 0.4 %
Recovery	vs. 2019	82.7 %
Source market ranking		11

PROFILE OF VISITORS TO GERMANY FROM SPAIN IN 2025

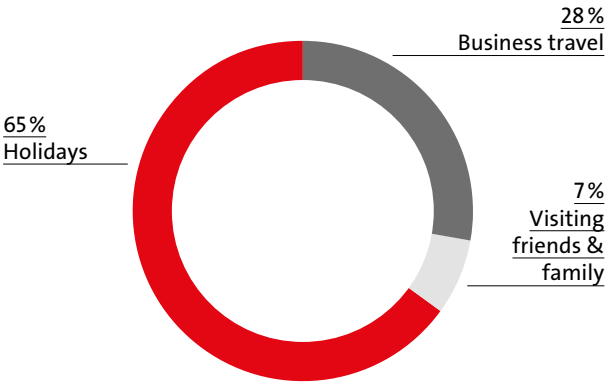
Spanish travellers have a high affinity with digital offerings and a strong interest in inspiring content on mobile devices and on social media. Key reasons for travel include cultural offerings, with sightseeing (47 per cent) and arts and culture (43 per cent) stated as key factors when choosing a destination. Culinary experiences also play an important role.

The Spanish mostly travel as couples and families, and thus look for reliable, safe and convenient options that are particularly engaging. Spanish tourists spend an average of €975 per trip to Germany, suggesting that they are price-sensitive and quality-conscious.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

78 % Visiting local attractions
64 % Going to restaurants/cafés
42 % Strolling around/exploring
40 % Guided tours
35 % Shopping (not for daily necessities)

TRIPS TO GERMANY BY MARKET SEGMENT

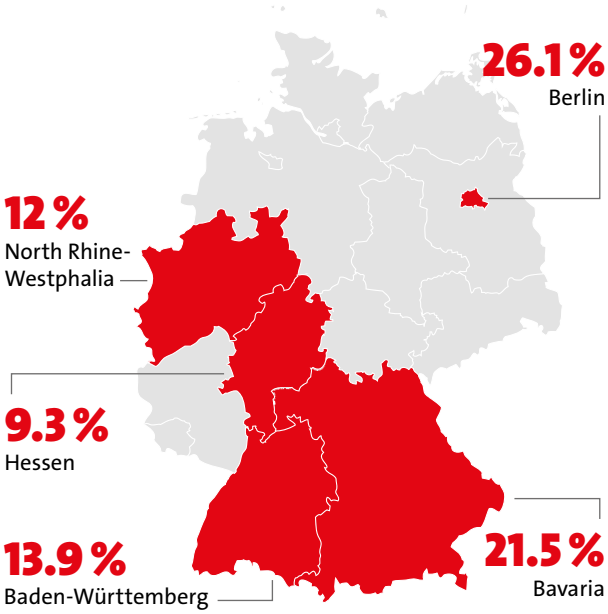


TOP CITY DESTINATIONS IN GERMANY

Berlin	26.1 %
Munich	11.7 %
Frankfurt	5.9 %
Hamburg	5.3 %
Düsseldorf	3.7 %

52.7 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **80 per cent of overnight stays** are in southern and western Germany.



PR event on the theme '275th anniversary of the death of Johann Sebastian Bach'

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Embrace German Nature: Spain adapted the campaign for the market by including a family influencer trip along the German Fairytale Route. It linked experiences in the great outdoors with family-friendly activities • an appropriate approach in the Spanish market, where young families, in particular, have a strong interest in nature-based and activity-based holidays. A collaboration with renowned influencer Mamas Viajeras (231,000 followers) provided extensive organic reach and authentic content.

1 m
video views

371,000
story impressions

6.24 m
paid impressions (Meta)

1,328
interactions

Accessible travel: media campaign in partnership with Impulsa Igualdad and TUR4all, tour with – and testimonials from – four experts, including a wheelchair influencer, complemented by a broad strategy for content, social media and conventional media.

'Navidad en Alemania' Christmas campaign: collaboration with travel agency body CEAV, airline partners Iberia and Vueling, webinar for travel agents, campaign website with portraits of cities with direct flights, Christmas video as part of the on-board entertainment

Cultureland Germany: GNTB Madrid organised a high-quality PR event with cultural heavyweights Dresden, Leipzig and Weimar. Presentations (28 participants), networking and accompanying music events, including a flash mob in front of the Royal Palace (300 seats and high reach with passers-by), helped to authentically convey German culture and boost Germany's image as a cultural travel destination. Key themes were the anniversary of Bach's death, classical music and cultural history. The collaboration with German institutions increased credibility, while 500 flyers and 500 competition postcards boosted activation marketing.

PRESS AND TRADE

MeetGermany B2B workshop in Malaga on 16 October with 17 German partners and 25 key accounts from Spanish tour operators • annual press conference with around 40 media representatives on 8 April in the library of the German Archaeological Institute in Madrid • press conference in Lisbon on 15 April

SWITZERLAND

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+ 0.9 %
Rate of inflation	2025	+ 0.1 %
Level of international travel	2024	342 %

MOST POPULAR TRAVEL DESTINATIONS

#1	**Germany**	# 3	Italy
# 2	France	# 4	Spain

INBOUND TOURISM TO GERMANY FROM SWITZERLAND

Overnight stays	2024	6.9 million
Travel expenditure	2025	€6.2 billion
Overnight stays	2025	6.7 million
Change	Year on year	– 3.5 %
Recovery	vs. 2019	93.9 %
Source market ranking		3

PROFILE OF VISITORS TO GERMANY FROM SWITZERLAND IN 2025

Germany has a strong profile among the Swiss due to linguistic and cultural similarities and the consumption of German media. 68 per cent of visitors to Germany, most of whom come from Zurich, Bern and Aargau in German-speaking Switzerland and from Geneva, have visited Germany at least four times in the past. However, many destinations are courting affluent Swiss tourists and thereby intensifying competition.

The Swiss are European champions when it comes to rail travel, and the proportion of holiday trips to Germany made by rail is above average – a result, in part, of many years of close collaboration with Rheinalp GmbH.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

88 % Going to restaurants/cafés

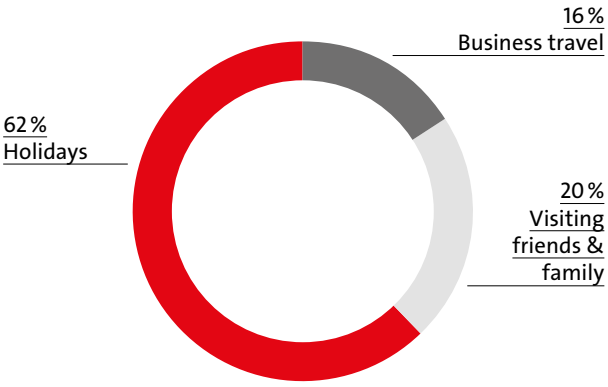
75 % Visiting local attractions

66 % Strolling around/exploring

46 % Shopping (not for daily necessities)

30 % Trips outside of the holiday destination

TRIPS TO GERMANY BY MARKET SEGMENT



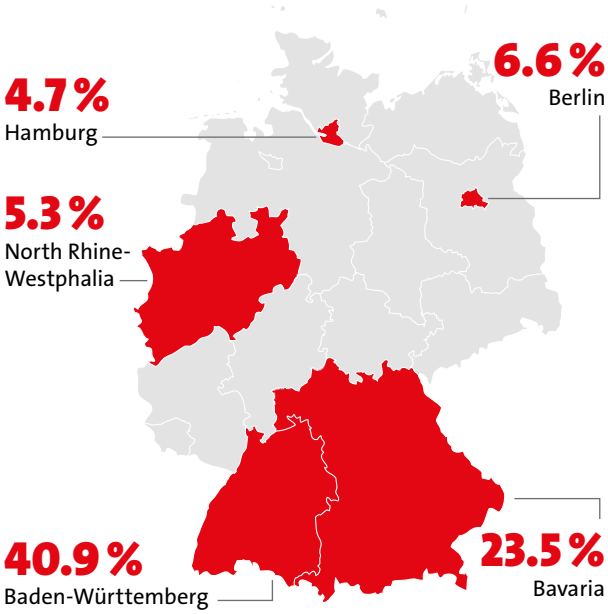
TOP CITY DESTINATIONS IN GERMANY

Munich	6.6 %
Berlin	6.6 %
Rust (2024)	6.1 %
Hamburg	4.7 %
Frankfurt	2.3 %

52.9 %

of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **three-quarters of overnight stays** are in southern and western Germany.



DOOH rail campaign

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Rail campaign: bilingual implementation (German and French) in collaboration with Rheinalp (DB / SBB), media planning across formats featuring campaign website and high-reach DOOH campaign, plus POS videos in SBB travel centres. Complemented by sales promotion with additional allocations of attractive discounted fares via display ads and native teasers on sbb.ch and in the SBB app.

143,000
visits to DE and FR microsite

39.5 m
ad impressions

648,379
DOOH screenings

Cultureland Germany: implemented as an innovative content campaign in DE and FR, including integration of the Cultureland widget on high-reach news and lifestyle platforms.

26.6 m
ad impressions

41,850
readers of the stories

Also cross-media collaboration with Swiss-based TravelMagazin featuring sites associated with the life and legacy of J. S. Bach and their tourism highlights. Presentation of Bach events via integration of the Bach event widget.

Embrace German Nature: inspiration campaign focused on camping and nature-based holidays in Germany in collaboration with TCS, the leading partner in the area of camping with its own community. Trilingual implementation and marketing across Switzerland, link with Pincamp for direct online booking of campsites.

Also inspirational campaign in German and French in collaboration with tour portal Outdooractive.

23 m
ad impressions

45.8 %
interaction rate

PRESS AND TRADE

Annual press conference • Germany workshop on the trend for immersive cultural experiences with a keynote speech by Robert Rückel, Director of Deutschlandmuseum • press event on the Cultureland theme in singer Udo Jürgens' former loft apartment in Zurich • collaborations with tour operators such as Eurobus, Twerenbold and Hotelplan as part of the Christmas campaign

FRANCE

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+0.9 %
Rate of inflation	2025	+1.3 %
Level of international travel	2024	90 %

MOST POPULAR TRAVEL DESTINATIONS

#1	Spain	#3	Italy
#2	**Germany**	#4	UK

INBOUND TOURISM TO GERMANY FROM FRANCE

Overnight stays	2024	3.7 million
Travel expenditure	2025	€6.2 billion
Overnight stays	2025	3.7 million
Change	Year on year	–1.5 %
Recovery	vs. 2019	95 %
Source market ranking		7

PROFILE OF VISITORS TO GERMANY FROM FRANCE IN 2025

Around two thirds of French people spend their holidays in their own country. When it comes to outbound travel, Germany faces strong competition from sunnier destinations in the Mediterranean and from city breaks to other major European cities. The highest potential is found among urbanites with high digital affinity and a strong desire to travel. They mainly live in Île-de-France, but are also found in western and eastern France, especially the border regions of Alsace and Lorraine. The 26–35 age group is particularly well represented, accounting for a third of the outbound market and characterised by frequent travel, a preference for short breaks and a focus on experiences. Rising potential is also found among the over-50s as they have stable incomes and combine city breaks with cultural tourism and experiences in the great outdoors.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

79 % Going to restaurants/cafés

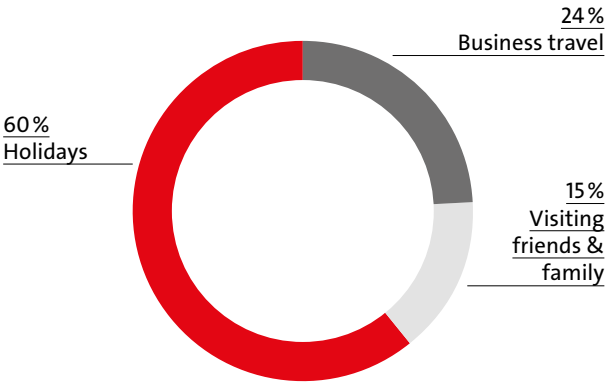
75 % Visiting local attractions

66 % Strolling around/exploring

46 % Shopping (not for daily necessities)

30 % Trips outside of the holiday destination

TRIPS TO GERMANY BY MARKET SEGMENT



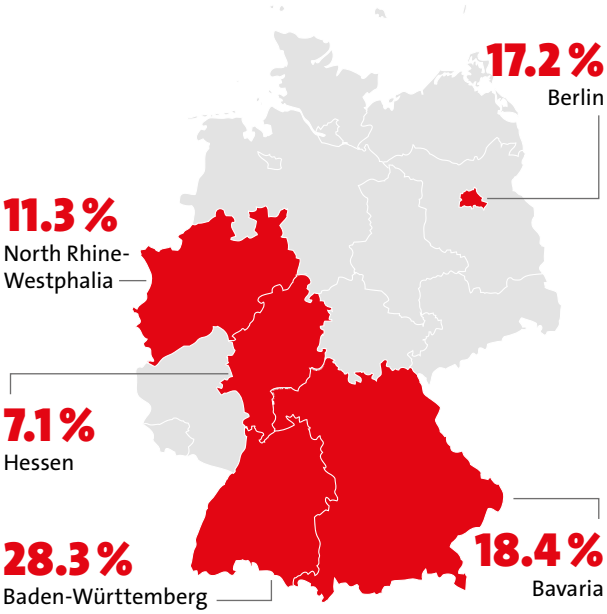
TOP CITY DESTINATIONS IN GERMANY

Berlin	17.2 %
Munich	7.8 %
Rust (2024)	4.9 %
Frankfurt	4.4 %
Hamburg	3.9 %

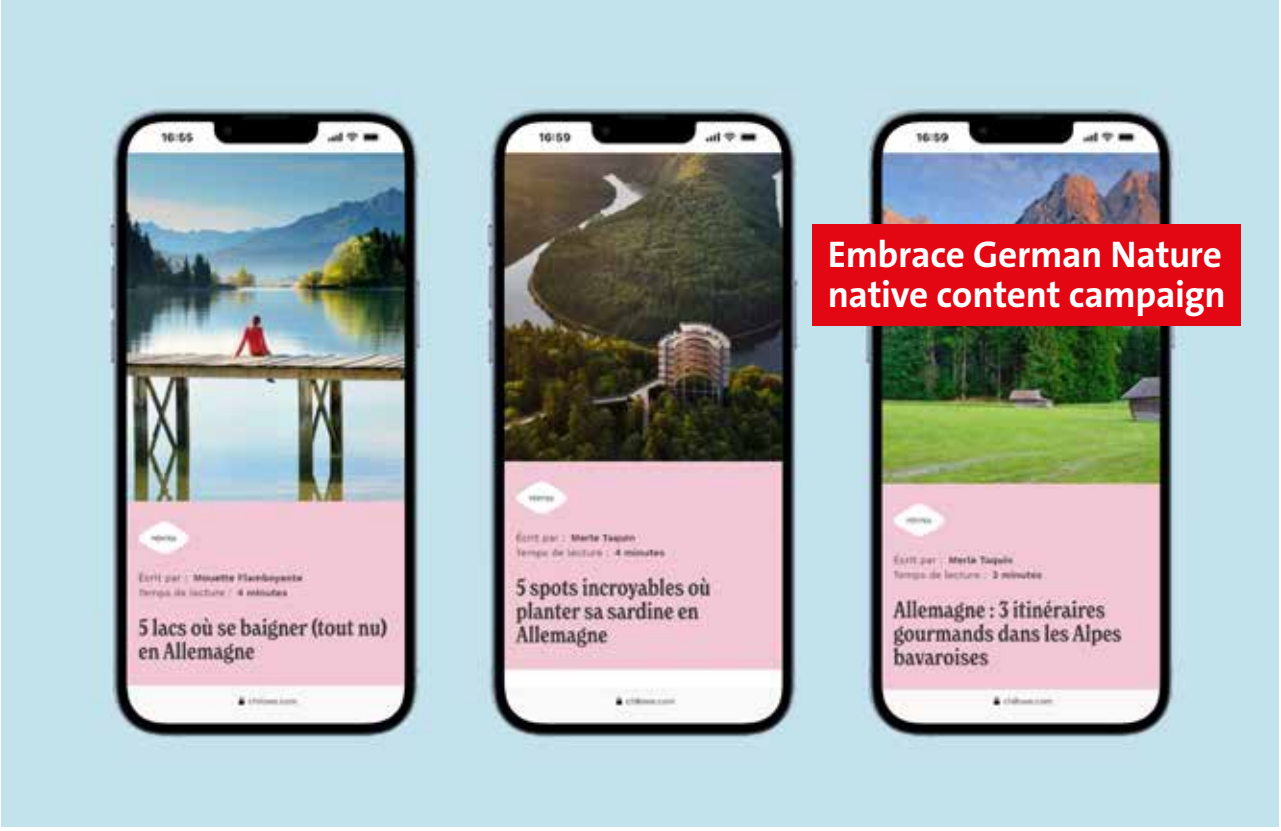
52.7 %

of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **two-thirds of overnight stays** are in southern Germany, western Germany and Berlin.



THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Embrace German Nature: native content campaign with Chilowé, a leading outdoor travel channel, four editorial articles, banner advertising, an exclusive newsletter, social media marketing and a competition to boost activation marketing • Partner Garmisch-Partenkirchen as a prime example of outdoor offerings and experiences in the great outdoors • complementary influencer and video campaign with French influencers and travel video makers Coflocs

3.7 m impressions
11,600 interactions
2.31 hrs reading time

Cultureland Germany: large-scale editorial content campaign with Time Out • extensive curated dossier with around 40 cultural recommendations for the four pillars art, design, music and wine • integration of the four partner regions Munich, Saarland, Rhineland-Palatinate and Baden-Württemberg • content also shown via Instagram and Facebook posts, stories, an exclusive newsletter feature and display formats

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Collaboration with Atout France & DB SNCF: influencer campaign with Atout France and partner destinations Heidelberg and Besançon as part of a bilingual, cross-border storytelling format • continuation of the successful collaboration with DB SNCF Voyageurs, TGV INOUI and nine German partner destinations as part of a large-scale 360° marketing campaign

55.8 m impressions
400,000 clicks

PRESS AND TRADE

Two-day roadshow with Maritim Hotels, the Prussian Palaces and Gardens Foundation, Europa-Park and Düsseldorf Tourismus featuring an in-person event (19 June) and an online event (20 June) • PR event in collaboration with visitBerlin in Hoxton Orangerie Paris with 28 journalists, influencers and partners from leading French media

ITALY

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+0.4 %
Rate of inflation	2025	+1.7 %
Level of international travel	2024	59 %

INBOUND TOURISM TO GERMANY FROM ITALY

Overnight stays	2024	3.5 million
Travel expenditure	2025	€2.3 billion
Overnight stays	2025	3.5 million
Change	Year on year	–1.4 %
Recovery	vs. 2019	83.3 %
Source market ranking		8

MOST POPULAR TRAVEL DESTINATIONS

#1 Spain
#2 Italy
#3 Germany
#4 Greece

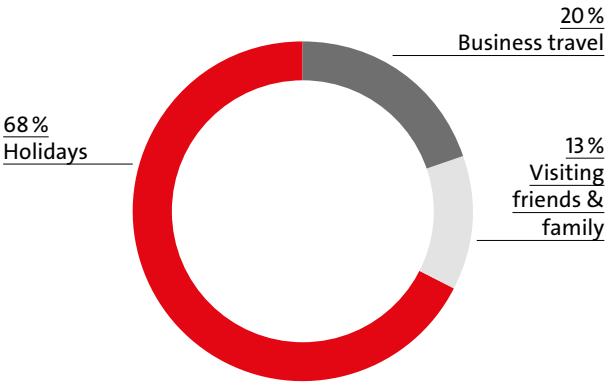
PROFILE OF VISITORS TO GERMANY FROM ITALY IN 2025

The majority of visitors are from northern Italy, i.e. from regions such as Lombardy, Veneto and Piedmont. There is high potential for short breaks and repeat visits from here. High digital affinity is primarily focused on mobile devices, and social media is considered the main source of information when choosing a travel destination. Independent travellers dominate the market with trends such as 'off the beaten track', authentic and sustainable tourism, and experiencing local festivals and culture.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

82 % Visiting local attractions
72 % Going to restaurants/cafés
47 % Strolling around/exploring
33 % Sampling local food and drink
30 % Shopping (not for daily necessities)

TRIPS TO GERMANY BY MARKET SEGMENT

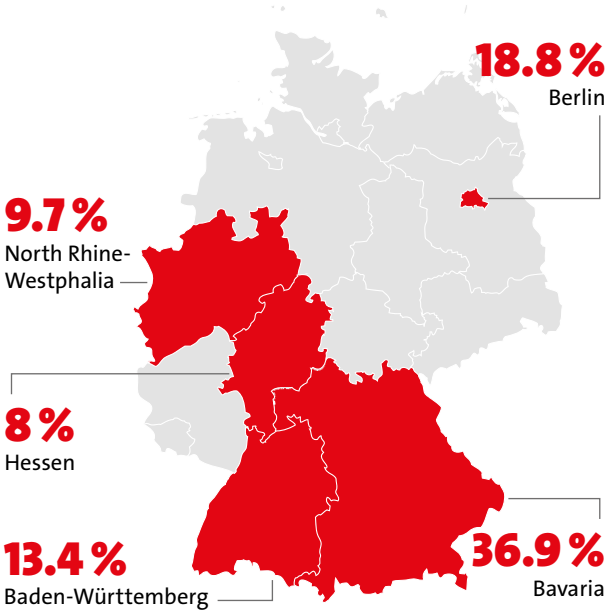


TOP CITY DESTINATIONS IN GERMANY

Munich	18.9 %
Berlin	18.8 %
Frankfurt	5.2 %
Hamburg	3.2 %
Nuremberg	2.4 %

48.5 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **two-thirds of overnight stays** are in southern Germany, western Germany and Berlin.



Cultureland Germany event during Milan Design Week

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Culture and design exhibition organised by GNTB Italy during Milan Design Week (Fuori Salone) • digital and interactive tools showcasing iconic exhibits from German design and architecture (e.g. Keler's cradle from Bauhaus Museum Weimar, TECTA chair etc.) • immersive videos on GermanyTravel and Premium Partners, touchscreen monitors featuring the Cultureland Germany microsite and monitors with partners' promo videos

87,000
visitors

3,057
journalists

681,043
reach through articles about the exhibition

108,510
views of GNTB content on social media

Christmas campaign featuring computer-generated imagery (CGI): first use of a Fake-Out-of-Home (FOOH) campaign • a new, fast-growing digital format that combines AI imagery with real places; boosted by a targeted Google Ads campaign featuring CGI videos promoting Saxony and Stuttgart

Booking campaign with Europa-Park and Eurowings: B2C campaign on eDreams with microsite and several advertising options on OTA channels • complemented by programmatic B2B campaign targeting travel agencies via GDS platform Travelport

PRESS AND TRADE

PR event on 5 June with visitBerlin at the Goethe Institute in Rome presenting key GNTB theme-based campaigns, with a focus on 'Cultureland Germany' and 'Berlin culture projects' • annual press conference on 6 May in Milan with the theme-based campaigns 'Cultureland Germany', '275 years of J. S. Bach' and '50 years of the German Fairytale Route', as well as offerings for active holidays and culinary experiences • round table for the press with Nürnberg Tourismus on 25 September in Milan • participation in two press workshops run by ADUTEI (association of NTOs operating in Italy) in Milan on 2 April and in Rome on 4 November • 13 individual press tours, incl. along the German Fairytale Route • new B2B workshop format • sales calls • webinars • influencer trip: Giulia Lamarca visits Europa-Park and the Black Forest in her wheelchair and with her family • LGBTQ+ influencer trip: Giovanni Arena explores LGBTQ+ aspects in Munich and the city's history

Regional management Americas / Israel



10.1 m
overnight stays in 2025

– 2.4 %
year-on-year change

12.1 %
share of the German inbound travel market

The US market still dominates this region, but consumers were spooked by economic trends and rising inflation. Nevertheless, the USA remains the leading overseas source market for inbound tourism to Germany. Despite limited opportunities for marketing, Israel saw a significant increase in overnight stays in Germany in 2025.



USA

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+2.0 %
Rate of inflation	2025	+2.7 %
Level of international travel	2024	44 %

MOST POPULAR TRAVEL DESTINATIONS

#1 France
#2 UK
#3 Spain
#4 Germany

INBOUND TOURISM TO GERMANY FROM THE US

Overnight stays	2024	7.2 million
Travel expenditure	2025	€9.6 billion
Overnight stays	2025	6.9 million
Change	Year on year	–4.2 %
Recovery	vs. 2019	99.4 %
Source market ranking		2

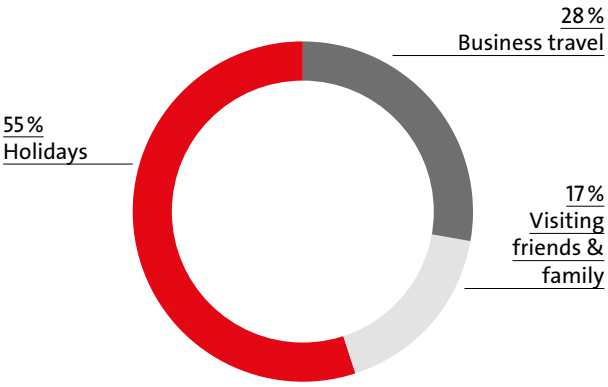
PROFILE OF VISITORS TO GERMANY FROM THE USA IN 2025

After several years of above-average growth in travel to Germany, 2025 was characterised by consolidation. Nevertheless, the USA defended its second place in the ranking of source markets. US Americans have very high digital affinity. According to Phocuswright, 33 per cent use AI to plan their trips, a record high by international standards. Travel agent networks such as Virtuoso, Signature and Travel Leaders play an important role in sales. They influence the advice and sales provided by travel advisers through preferred supplier programmes, higher commissions and training. This channels particularly high-end and specialised demand towards Germany. Event-related travel, for example to Formula 1 races and music concerts in other countries, are key travel trends among Americans.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

87 % Visiting local attractions
70 % Going to restaurants/cafés
46 % Sampling local food and drink
43 % Guided tours
40 % Strolling around/exploring

TRIPS TO GERMANY BY MARKET SEGMENT

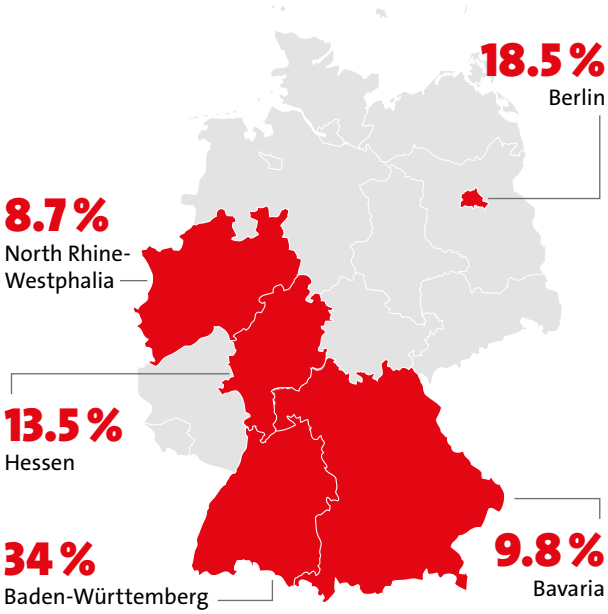


TOP CITY DESTINATIONS IN GERMANY

Munich	20.5 %
Berlin	18.5 %
Frankfurt	10.1 %
Cologne	3.6 %
Hamburg	3.6 %

56.3 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



Southern Germany, western Germany and Berlin account for **85 per cent of overnight stays**.



THE GNTB’S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Cultureland Germany: cross-media content campaign with US travel publisher AFAR and eight German partners • four tailored journey itineraries featuring cultural highlights and experiences in Germany • website takeover on AFAR.com, email marketing and social media posts

82,592
page views for article

2,971,910
impressions overall

Simply Feel Good: CTV campaign with CTV agency VDX.tv combining CTV spots, interactive VDX video units, companion displays, video / display extensions, retargeting and a dedicated landing page • QR code in the CTV spots for direct transition from TV to mobile / web

5,812,078
CTV views

11,176,494
impressions overall

Embrace German Nature: cross-media content campaign with Garmisch-Partenkirchen and Smithsonian Magazine • multimedia native photo series featuring natural landscapes and experiences in the great outdoors, including call to action • additional promotion on social media and video package

PRESS AND TRADE

28–31 January, Virtuoso Forum, FLL • 27 February, ETOA virtual meeting • 29–30 June, Signature regional workshops, Chicago and LA • 8–12 June, Luxury Forum & trade show by Travel Leaders, Las Vegas • sales visits: TravelStore Pasadena, FROSCH Woodland Hills, Monrovia Travel • 9–15 August, Virtuoso Travel Week, Las Vegas • 15–18 September, roadshow & marketplace, Denver, Scottsdale, Anaheim • 3–4 October, Cruise Planners convention, FLL • 10–13 November, Signature Travel Network Conference & trade show, Las Vegas • 28 November to 5 December, Christmas markets study trip • 1–5 December, USTOA Annual Conference & Marketplace, Maryland • press webinars with partners Frankfurt, Bremerhaven, Nuremberg, Lufthansa • video production for Great Big Story on the history of the nutcracker • GNTB partner events in New York, Chicago and Los Angeles

ISRAEL

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+2.5 %
Rate of inflation	2025	+3.2 %
Level of international travel	2024	84 %

MOST POPULAR TRAVEL DESTINATIONS

#1	France	**#3**	**Germany**
#2	Italy	#4	Hungary

INBOUND TOURISM TO GERMANY FROM ISRAEL

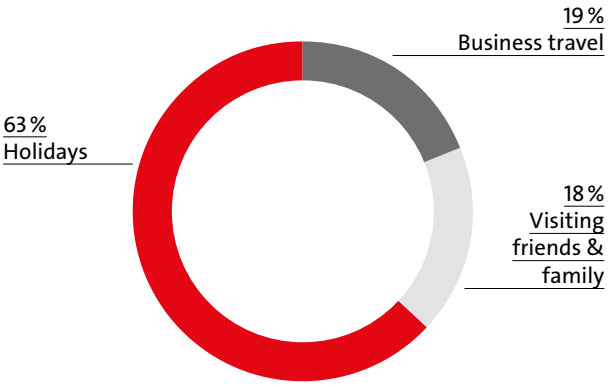
Overnight stays	2024	614,470
Travel expenditure	2025	€0.6 billion
Overnight stays	2025	685,963
Change	Year on year	+11.6 %
Recovery	vs. 2019	77.3 %
Source market ranking		23

PROFILE OF VISITORS TO GERMANY FROM ISRAEL IN 2025

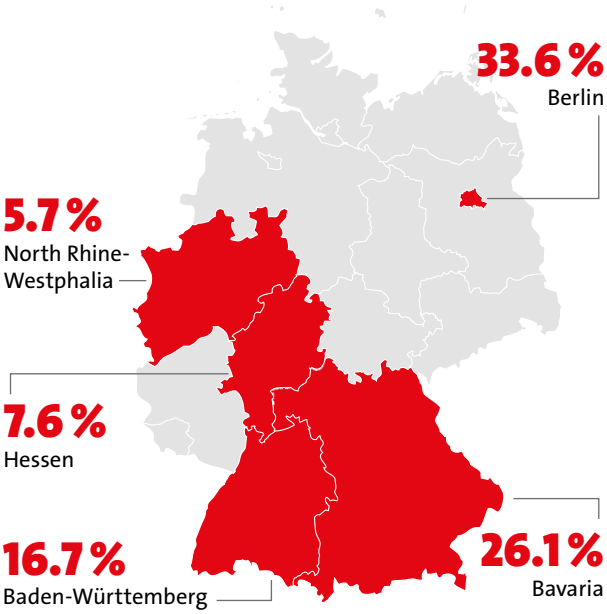
Outbound travel from Israel in 2025 was heavily influenced by the political and security situation. Despite all the restrictions, Israel remains a country whose population likes to travel, taking several trips abroad on average each year.

Israeli travellers prefer destinations that are easily accessible, offer good value for money and maintain reliable connections even in times of crisis. The main target groups are families with children who are particularly keen on nature and theme parks; young adults interested in culture, music, events, nightlife, sport and experiences in the great outdoors; and travellers aged 50 and over with an interest in culture, museums, classical music, history, fine dining and high-spec city breaks. Specific requirements arise from the high level of digital affinity, the need for safety and the growing demand for vegetarian, vegan and kosher food.

TRIPS TO GERMANY BY MARKET SEGMENT



MOST POPULAR DESTINATIONS IN GERMANY



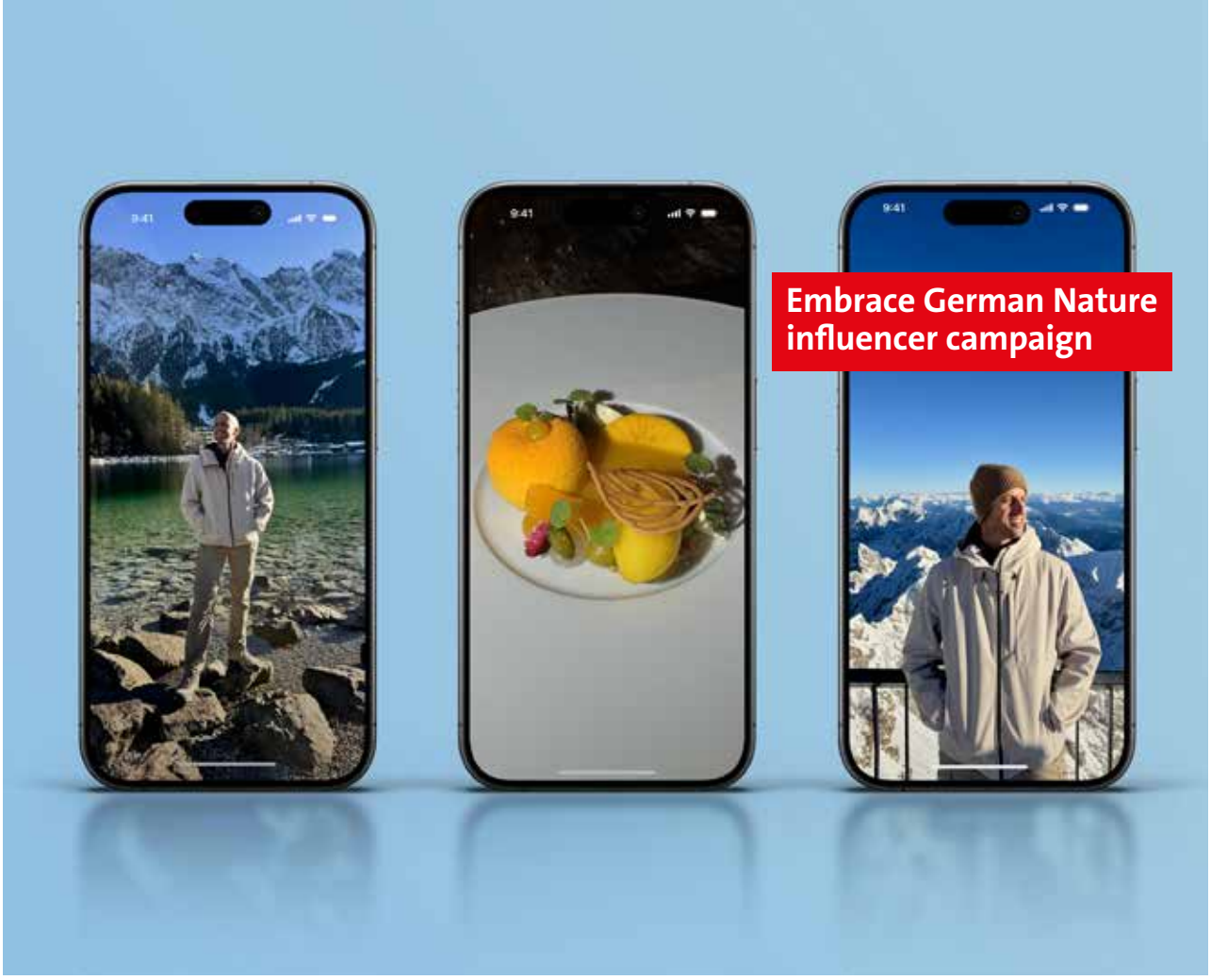
One third of overnight stays in Berlin, just over a quarter in Bavaria.

TOP CITY DESTINATIONS IN GERMANY

Munich	33.6 %
Berlin	13.8 %
Frankfurt	5.8 %
Hamburg	2.2 %
Cologne	1.8 %

57 %

of all overnight stays in the top 5 cities



THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Embrace German Nature: influencer campaign with Erez Dagan, Israeli influencer and content creator, with a focus on travel and nature in Israel and worldwide • more than 600,000 followers on social media channels • explored Bavaria's natural landscapes in autumn 2025 after the Brand Summit in Germany• focus on the specific interests of Israeli travellers, such as ease of access, pricing, welcome and, in particular, the natural landscapes • content uploaded by Erez Dagan also focused on lesser-known facets • video content on Instagram, TikTok and YouTube

528,052
reach

212,321
views on social media

Cultureland Germany: cross-media OTC campaign in collaboration with Passport Group, Israel's leading media company for topics covering travel, flights and lifestyle • platform publishes 24/7 in print media, online and on social media • campaign period December 2025 to March 2026 • use of all communication channels, including website, mobile and app • 'Inspiring Germany' header with content focus on enchanting cities and remarkable natural landscapes • range of advertising formats, including editorial pieces

56,000
views of editorial articles

9.4 m
views online (desktop and mobile)

PRESS AND TRADE

No large events or group formats in 2025 due to the security situation and restrictions on large gatherings • business development primarily via individual contacts • sales calls throughout the year • media briefing in March as an online event • two individual press tours and 15 editorial discussions

Regional management Asia



8.3 m
overnight stays in 2025

+0.1%
year-on-year change

9.7%
share of the German inbound travel market

Regional Management Asia covers some of the strongest growth markets for global tourism. This presents growth opportunities for Germany as a travel destination too. The GNTB currently generates around 10 per cent of all overnight stays from this region.



CHINA

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+4.8 %
Rate of inflation	2025	0 %
Level of international travel	2024	5.3 %

MOST POPULAR TRAVEL DESTINATIONS

#1	**Germany**	#3	Switzerland
#2	Spain	#4	France

INBOUND TOURISM TO GERMANY FROM CHINA

Overnight stays	2024	1.8 million
Travel expenditure	2025	€4 billion
Overnight stays	2025	1.8 million
Change	Year on year	– 0.9 %
Recovery	vs. 2019	63.6 %
Source market ranking		12

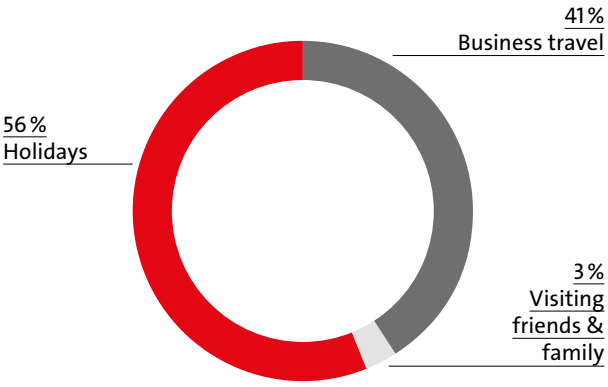
PROFILE OF VISITORS TO GERMANY FROM CHINA IN 2025

Most guests come from major economic hubs such as Beijing, Shanghai, Chengdu, Guangzhou and Shenzhen, but also from growing secondary cities such as Hangzhou, Wuhan and Chongqing. Premium independent travel is right on trend, primarily focusing on cultural experiences, golf and wellness. Many Chinese plan their trips online themselves, but a considerable proportion have their holidays tailored by, and booked via, a tour operator.
Digital affinity is exceptionally high: travellers expect comprehensive information online on Chinese platforms (WeChat, Xiaohongshu, Douyin), simple booking processes, mobile payment options (Alipay, WeChat Pay) and fast and straightforward communication in Chinese.

MOST POPULAR ACTIVITIES ON TRIPS TO GERMANY

83 % Visiting local attractions
73 % Going to restaurants/cafés
65 % Guided tours
60 % Visiting museums/exhibitions
37 % Strolling around/exploring

TRIPS TO GERMANY BY MARKET SEGMENT

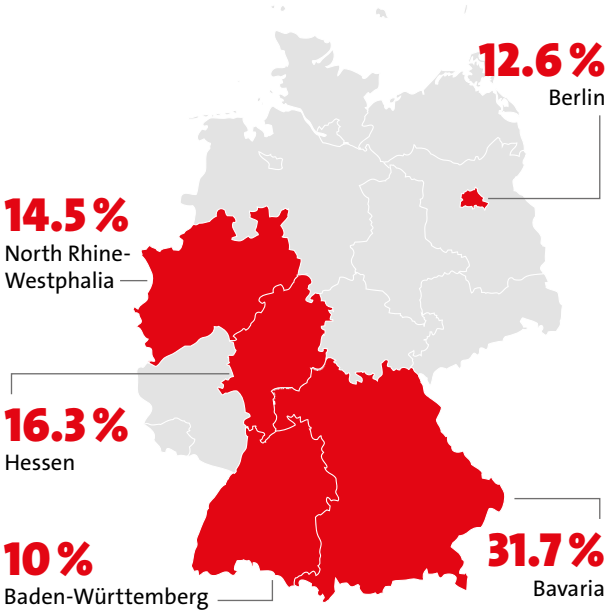


TOP CITY DESTINATIONS IN GERMANY

Munich	17.7 %
Berlin	12.6 %
Frankfurt	11.7 %
Cologne	4.5 %
Düsseldorf	3.9 %

53 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



Almost **one third of overnight stays** in Bavaria.



GNTB press conference with partner Lufthansa

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Embrace German Nature: the campaign showcased Germany's many natural landscapes featuring cultural highlights through successful B2C activities and B2B tools, thus achieving high, cross-media reach in the Chinese market.

17 m
page views

8 m
video views

Magic Cities: cross-media campaign with Ctrip (landing page, advertising, product marketing, social media, content marketing, coupon activities for Lufthansa and Deutsche Bahn) and RED (influencer trip, content posting, advertising, user-generated content)

102 m
impressions overall

14.4 m
views

Season's Greetings from Germany: market-specific initiative on the Christmas market theme with nine Chinese tour operators • development and promotion of Christmas market trips • use of the operators' own channels (e.g. Weibo, WeChat) and offline networks

Christmas shopping campaign in collaboration with Alipay and German partners Stuttgart and Galeria • creation of a GNTB WeChat mini-programme on Alipay • Germany Shopping Festival: voucher campaign, advertising, influencer trip and content marketing on social media

PRESS AND TRADE

Annual press conference in Beijing in May • six webinars on global theme-based campaigns • 'China exclusive' events in May: trade events, B2C events and sales calls in Beijing, Shanghai and Guangzhou with German partners Zugspitze, Outletcity Metzingen, MEISSEN porcelain, Ingolstadt Village & Wertheim Village, Hertz car rental • sales week: get-together events in secondary cities Chengdu, Xi'an, Nanjing, Jinan • press event in Beijing in November • offline events in Beijing in collaboration with high-end club and private banks (CITIC, ICBC)

ARAB GULF STATES

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+ 6.6 %
Rate of inflation	2025	+ 2.8 %
Level of international travel	2024	51 %

MOST POPULAR TRAVEL DESTINATIONS

# 1	Turkey	# 3	UK
# 2	France	**# 4**	**Germany**

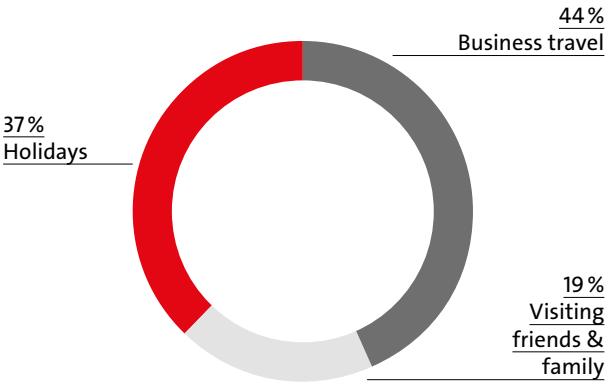
INBOUND TOURISM TO GERMANY FROM THE ARAB GULF STATES

Overnight stays	2024	2.1 million
Travel expenditure	2025	€3 billion
Overnight stays	2025	1.2 million
Change	Year on year	– 1.2 %
Recovery	vs. 2019	73.9 %
Source market ranking		17

PROFILE OF VISITORS TO GERMANY FROM THE ARAB GULF STATES IN 2025

Visitors from GCC states have a strong focus on luxury travel, wellness and exclusivity. Demand for culture and tailored experiences is on the rise, especially in Saudi Arabia and the UAE. Convenience, safety and ease of access are key decision-making criteria, particularly for families. Travellers from GCC states have a very strong affinity with technology and expect user-friendly digital services when planning and booking their trip, and at the destination. Interest in exclusive experiences, private tours, luxurious accommodation and tailored itineraries is high, and a certain level of cultural adaptation is expected, for example providing halal food and female-only offerings, and showing consideration for Muslim holidays and prayer times.

TRIPS TO GERMANY BY MARKET SEGMENT

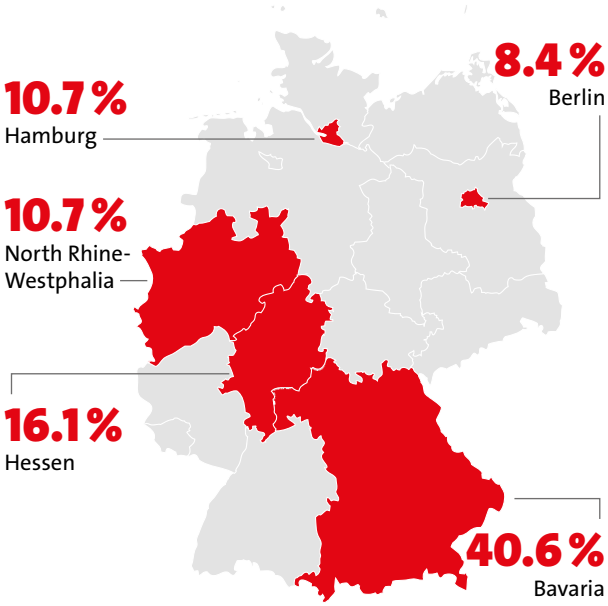


TOP CITY DESTINATIONS IN GERMANY

Munich	16.7 %
Berlin	13.7 %
Frankfurt	12.2 %
Stuttgart (2024)	4.2 %
Hamburg	4.6 %

64.5 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



Bavaria is top for overnight stays, while Berlin and Hamburg are also of interest.



ATM travel fair





THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

20 years of marketing in the Arab Gulf States: press event with Petra Hedorfer at the TODA Theatre of Digital Art in Dubai • immersive Germany experience offers inspiring insights into the latest trends in Destination Germany • new story ideas for the media in the Arab Gulf States • presentation of new social media strategy for Gen Z travellers from the Gulf States • 'thank you' to key partners in the travel industry

PRESS AND TRADE

Roadshow in the Arab Gulf States to Manama, Jeddah, Riyadh and Dubai • participation in ATM travel fair and the Discover Europe Travel Summit buyer workshop in Dubai • sales calls with key partners in Bahrain and Dnata in the UAE • market insight webinar • market call and staff webinar for Emirates Holidays on the 'Season's Greetings from Germany' theme • annual press conference at the ATM with partner Lufthansa

JAPAN

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+ 0.6 %
Rate of inflation	2025	+ 2.1 %
Level of international travel	2024	14 %

MOST POPULAR TRAVEL DESTINATIONS

#1 Italy
#2 Spain
#3 France
#4 Germany

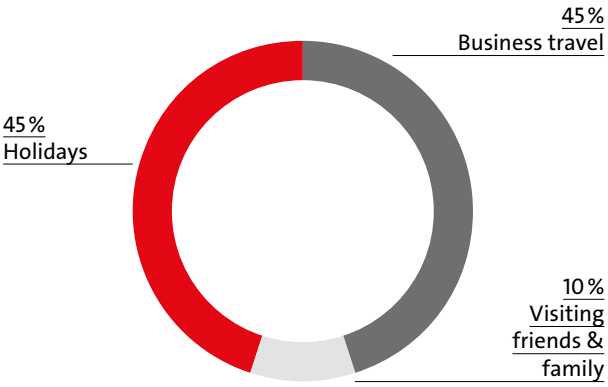
INBOUND TOURISM TO GERMANY FROM JAPAN

Overnight stays	2024	699,791
Travel expenditure	2025	€0.9 billion
Overnight stays	2025	703,288
Change	Year on year	+ 0.5 %
Recovery	vs. 2019	58.4 %
Source market ranking		22

PROFILE OF VISITORS TO GERMANY FROM JAPAN IN 2025

Due to rising travel costs and the currently unfavourable exchange rate of the yen against the euro, nearby destinations are enjoying a significant rise in demand, while the appetite for travel to European destinations such as Germany, Italy, France and Spain is increasing at a comparatively slower pace. Therefore, only high-end customers can be considered a realistic target group at the moment. Expectations in terms of quality, convenience and exclusivity are exceptionally high in this segment. The focus is on niche markets such as music lovers (classical music and opera), football fans (Bundesliga) and art students (design and architecture).

TRIPS TO GERMANY BY MARKET SEGMENT

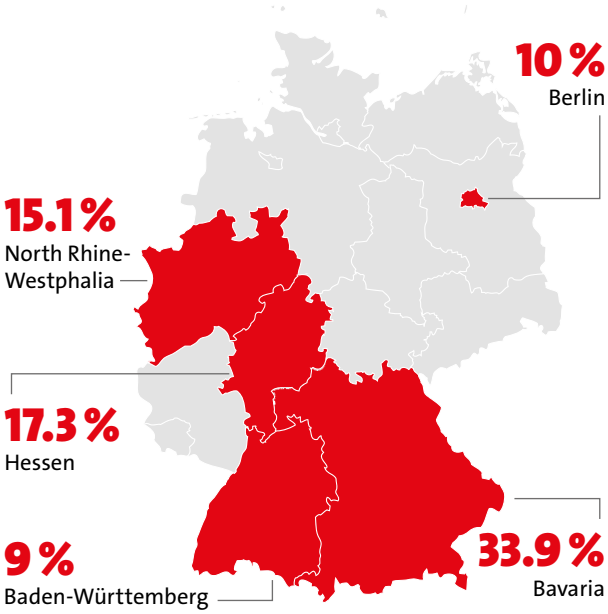


TOP CITY DESTINATIONS IN GERMANY

Munich	20.1 %
Frankfurt	13.9 %
Berlin	10.0 %
Düsseldorf	7.6 %
Dresden	3.3 %

55 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



One third of overnight stays in Bavaria, and a further third in Hessen and North Rhine-Westphalia.



2025 annual press conference in Tokyo

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Goethe Route: cross-media campaign for the market-specific route from Frankfurt to Wetzlar, Fulda, Wartburg, Erfurt, Weimar, Leipzig and Dresden • campaign landing page on 4travel.jp • integration of the GNTB's Bach widget

9 m
impressions

116,000
page views

Bach anniversary: Bach widget on OTA 4travel.jp

9.4 m
reach

Chemnitz, 2025 European Capital of Culture: participation in events run by the EU–Japan Fest Committee • individual press trip to Chemnitz (winner of the GNTB Media Award)

50 years of the German Fairytale Route: localisation of 'Grimm's Quest' in Japanese • PR event on 2 October in Tokyo and exhibition in the Tsutaya Daikanyama bookshop • umbrella theme at the 2025 Deutschlandfest Festival in Aoyama Park, Tokyo, from 31 October to 3 November • individual press trip (winner of the GNTB Media Award)

Cultureland Germany: content marketing with widget on OTA 4travel.jp

8 m
reach

PRESS AND TRADE

Seven B2B webinars with 224 participants in total • German Travel Week: roadshow from 4–7 November with workshops and speed dating events in Tokyo, Seoul and Osaka with 13 German partners, 133 buyers and 40 journalists • three fact-finding tours for the trade with 23 participants in total • annual press conference on 23 May in Tokyo with 23 media representatives • PR event on '50 years of the German Fairytale Route' on 2 October in Tokyo, combined with a B2C exhibition on the German Fairytale Route in the Tsutaya Daikanyama bookshop • Berlin promotion in Seoul, Tokyo and Osaka from 15–19 September, 50 contacts through press briefings and networking events • GNTB presence at the 2025 EXPO Osaka • 2025 GNTB Tourism Media Award, prizegiving ceremony on 11 December in Tokyo, followed by networking event with Lufthansa (new Allegris product) and the German Wine Institute

INDIA

Source market at a glance

Sources: German Federal Statistical Office, IPK International 2024/25 Quality Monitor survey of the German tourism industry 1 May 2023 to 31 October 2025. Travel expenditure: IPK/WTM 2026, incl. costs of travel, accommodation, food and drink, onward travel, expenditure at the destination.

MACROECONOMIC DATA

GDP	2024/25	+6.6 %
Rate of inflation	2025	+2.8 %
Level of international travel	2024	51 %

MOST POPULAR TRAVEL DESTINATIONS

#1 UK
#2 France
#3 Germany
#4 Spain

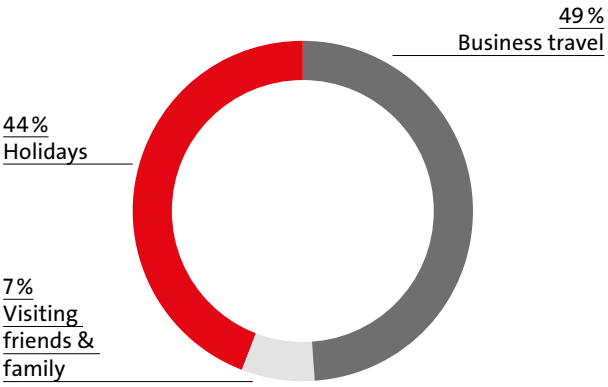
INBOUND TOURISM TO GERMANY FROM INDIA

Overnight stays	2024	897,841
Travel expenditure	2025	€1.3 billion
Overnight stays	2025	928,635
Change	Year on year	+3.4 %
Recovery	vs. 2019	96.6 %
Source market ranking		18

PROFILE OF VISITORS TO GERMANY FROM INDIA IN 2025

The Indian market for outbound travel to Europe, particularly to Germany, is characterised by rising disposable incomes among a growing middle class and growing interest in authentic cultural experiences. Most potential travellers to Germany are from the metropolitan regions of Mumbai, Delhi, Bangalore and Hyderabad. Affluent independent travellers and young adults are primarily interested in luxury, culture and educational opportunities, while adventure, festivals and historical sights are very popular with millennials, Gen Z and families.

TRIPS TO GERMANY BY MARKET SEGMENT

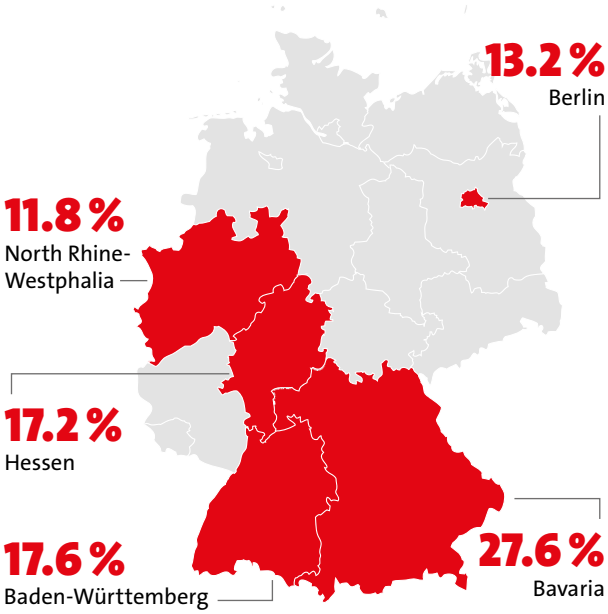


TOP CITY DESTINATIONS IN GERMANY

Munich	16.7 %
Berlin	13.7 %
Frankfurt	12.2 %
Stuttgart (2024)	4.2 %
Hamburg	4.6 %

50 %
of all overnight stays in the top 5 cities

MOST POPULAR DESTINATIONS IN GERMANY



More than **two-thirds of overnight stays** are in southern and western Germany.



Roadshow

THE GNTB'S KEY ACTIVITIES IN THE MARKET

END CUSTOMERS

Embrace German Nature and Cultureland Germany: Bollywood stars Huma Qureshi and Malaika Arora engaged as ambassadors to promote Germany to their large fanbase in India • collaboration with Global Spa magazine • accompanying PR campaign

India Pool: successful relaunch of the pool with a total of seven partners • doubling of visitor bookings via MakeMyTrip • 2,000 bookings with TBO, influencer campaign • two million impressions with Global Spa, one million readers of print and online media

20 m
reach for PR campaign

80
placements in lifestyle, travel and financial magazines

1 m
reach for influencer campaign

200,000
interactions for influencer campaign

PRESS AND TRADE

India roadshow through four major cities with a significant number of potential new business partners, growing interest in information on theme parks, shopping malls and major cities • sales calls and networking expanded to tier 2 and tier 3 cities with growing, relevant potential for travel to Germany • webinars for tour operators, with interest in face-to-face contact increasing significantly after the pandemic • annual press conference and press event held outdoors to create a special atmosphere for making contact with media creatives and influencers

Accolades and awards for the GNTB's work around the world

The GNTB once again won a host of prestigious awards at home and abroad. They recognised innovative digital projects and the responsible and creative work of the GNTB as an organisation.

UNITED KINGDOM

The GNTB was honoured in two categories at the Wanderlust Reader Travel Awards in 2025:

- Gold for Most Desirable Destination for Sustainability
- Bronze for Most Desirable Destination for Culture & Heritage

DENMARK

GNTB Copenhagen won the 2026 Golden City Gate Award in the 'eco tourism' category. The accolade was bestowed for the GNTB film 'In Search of the Wild', which was produced as part of the 2025 'Embrace German Nature' campaign.

POLAND

GNTB Poland's 'Stay longer' campaign in 2024 was runner-up at the 2025 INMA Global Media Awards in the category 'Best Use of AI in Customer-Facing Products' (national brands). Centrepiece of the campaign was an AI-based travel planner with content marketing on onet.pl.

ARAB GULF STATES

At the Arabian Travel Awards, the GNTB was recognised as the 'Best in Promoting Sustainable and Accessible Travel'.

INDIA

GNTB India took silver at the 2025 Outlook Traveller Awards in the category 'Best International Campaign for the Indian Traveller'.

CHINA

The GNTB office in Beijing garnered six awards in total for its work in 2025:

- HCG Travel Group: Excellence and Cooperation Award
- National Tourism Sustainable High-end Travel Destination: top 5
- Arena Award: Global Most Charismatic Destination Award
- Travel Trade Media Awards: Sustainable Communication Award
- Voyage Awards: Special Performance Destination
- Trip.com: Global Partner Award

AUSTRIA

Award for innovative social media project

SWITZERLAND

Swiss Out of Home Award

The GNTB as top innovator

Thanks to its digital processes and solutions for inbound tourism, the GNTB won over the judges of the TOP 100 SME innovation competition for the sixth year in a row. In its application, the GNTB presented digital projects that were brought to life through a close collaboration between the management team and the employees. The projects help the sector, which predominantly comprises small and medium-sized enterprises, to promote Destination Germany on the international stage.



'UNESCO World Heritage sites in Germany' mixed reality app

The GNTB's 'UNESCO World Heritage sites in Germany' mixed reality app won the 2025 XR Industry Activation Award in the 'Interactive Business' category. The Next Reality Festival judges bestow this award in recognition of projects by companies that are making a tangible impact within their sector through the strategic and sustainable use of virtual, augmented and mixed reality.

At the X. Awards at the Future.Destination.Brand event in Barcelona, the app came second in the category 'The Digital Impact Award'.

At the Destinations for All world summit, the programme committee invited a presentation of the app, which features an accessibility-first design.

Putting the spotlight on accessible Germany

At the CMT travel fair, the organisation Aktive Behinderte Stuttgart – das Zentrum selbstbestimmt Leben (ABS ZsL), which champions the interests of people with chronic illnesses and disabilities, bestowed its Golden Wheelchair award in the 'Digital offerings' category to the GNTB website, www.germany.travel.

Grimm's Quest gamification app

The international Red Dot jury recognised the outstanding design of 'Grimm's Quest' among numerous entries from companies, design studios and agencies from around the world, choosing it as the winner of the 2025 Red Dot Award: Brands & Communication Design in the 'Digital Solutions' category.

The German Design Council chose 'Grimm's Quest' as the winner of the 2026 German Design Award in the 'Excellent Communications Design – Interactive User Experience' category. The German Design Award is one of the most prestigious design awards in the world and is held in high regard far beyond those working in design.

At the Digital Communication Awards (DCA), Grimm's Quest was awarded gold in the 'Contest & Game' category and bronze in the 'Storytelling' category following an international pitch by the GNTB. Quadriga University of Applied Sciences in Berlin has been honouring outstanding projects, campaigns and innovations in online communication across Europe in a total of 50 categories since 2011.









Wellness hotel
in Bad Hindelang



03

OUTLOOK
for inbound tourism to Germany

At the start of 2026, levels of optimism in the global tourism industry were high. According to the UN Tourism Barometer of January 2026, i.e. before the outbreak of the military conflict in the Middle East, experts in the international tourism industry anticipated possible growth of 3–4 per cent this year.

At the time this report was published, it was still unclear how long these armed conflicts will last for or how they might impact on international tourism.

However, international tourism will remain a growth sector in the medium- and long-term. Germany is able to compete in this market as a safe, service-oriented quality destination that has a clear brand profile and offers great value for money.



Outlook for Destination Germany

in the international market in 2026

Based on comprehensive analyses by international market research institutes, the GNTB believed in early 2026 that inbound tourism to Germany could grow by 3.2 per cent. This forecast was subject to the proviso that wars and economic conflicts do not escalate further.

From March onwards, the outbreak of war in the Middle East led to severe restrictions on air traffic over the Gulf hubs, a rapid rise in oil and energy prices, and economic turmoil that spread far beyond the countries involved. This is creating a more volatile environment for the



international travel industry. Given the complex geopolitical situation and the high degree of global interdependence, all forecasts for inbound tourism to Germany are subject to further developments in the Middle East.

Conflict in the Middle East increases volatility of forecasts for global tourism

The UN Tourism Barometer in January 2026 forecast potential growth in international tourism of 3–4 per cent compared with 2025, provided that the Asia-Pacific region continues to recover from the pandemic, global economic conditions remain favourable, price rises in tourism services continue to ease and geopolitical conflicts do not escalate.

The outbreak of war in the Middle East on 28 February was a shock for international tourism.

A key factor was the closure of hub airports and airspace in the Gulf region. A large proportion of the flights affected were between Europe and the Far East, between the Middle East and the Asia-Pacific region, and between the Middle East and Europe. According to analyses by the flight data platform OAG, this accounted for around 20 per cent of global air traffic.

Furthermore, the closure of the vital sea route through the Strait of Hormuz led to a sharp rise in oil and kerosene prices on global spot markets, and to major delays in international supply chains.

Within a very short space of time, both the fragility of the global tourism ecosystem and the resilience of the sector became apparent. This is reflected in the widely differing forecasts for the current year issued by international organisations and market research institutes.

Interim assessment, 20 May 2026
By the time this report went to press in mid-May 2026, the majority of airport hubs had gradually resumed their operations, although they had not yet fully returned to pre-crisis levels.

In its analysis from 15 April 2026, UN Tourism believes that tourism arrivals in the Gulf region could fall by 24–28 per cent by the end of the year if air traffic in the Middle East is significantly interrupted for three months. This would equate to around 2 per cent of arrivals worldwide and a loss of US$ 40 billion in travel expenditure.

At the same time, the Economic Impact Research by the World Travel & Tourism Council (WTTC) expects the global tourism sector to grow by 3.2 per cent in 2026. European GDP is expected to grow by just 1 per cent in 2026 due to ongoing inflationary pressures and economic uncertainties, with GDP in the travel and tourism sector forecast to grow by 3.6 per cent. According to the report, expenditure by international visitors across Europe is expected to rise by 7.1 per cent.

Potential impacts of the war in the Middle East on inbound tourism to Germany in 2026

In 2025, only 4.2 per cent of air passengers flew to Germany via the hubs in Dubai, Abu Dhabi and Doha. Arrivals via these Gulf hubs were down 39 per cent year on year in March 2026 and down 34 per cent in April.

Of the countries directly affected by the conflict in the Middle East, Israel generated 0.6 million overnight stays in Germany in 2025, a market share of 0.8 per cent, and the Gulf States 1.2 million (1.5 per cent). However, given

the above-average travel expenditure of visitors from GCC states, these falls have a disproportionately high impact on economic value creation.

Given the sudden rise in oil and kerosene prices at the outbreak of the war, the industry expected a sharp increase in economy-class fares. Ticket prices would rise worldwide as a result of global spot market prices, including in countries not directly affected by the war, and this could make air travel to Germany more expensive.

Analyses by Amadeus / Forward Keys were unable to substantiate this, at least up to April 2026. Nonetheless, kerosene prices are increasing to such an extent that many airlines have already reduced capacity in the market. Rising fuel prices in European countries could also have an impact on car travel in Europe. The car is the main means of transport for European travellers coming to Germany, accounting for 44 per cent of the modal split.

Opportunities for inbound tourism to Germany in 2026

An excellent reputation on the international stage, safety for travellers, a strong position in city breaks and cultural tourism, exceptional natural landscapes and very good value for money will continue to define Germany's status in the international market in 2026.

Europe

Germany is the second-most popular travel destination for Europeans, and this strong European foundation is a considerable source of stability in times of geopolitical uncertainty. Furthermore, according to a survey conducted by the European Travel Commission (ETC) following the outbreak of the war with Iran, there has been an 8 per cent increase in the intention to travel within Europe for the period from April to September compared with the prior year.

A survey in Germany's neighbouring countries in April 2026, conducted by Appinio on behalf of the GNTB, showed that the desire to travel to Germany has increased from 32 per cent to 37 per cent in the Netherlands and from 17 per cent to 23 per cent in Belgium since the conflict started.

Compared with other European countries, Germany scores highly on value for money. According to research by MKG Consulting, average hotel prices in the first quarter stood at €99, significantly lower than in many other European destinations, while hotel occupancy rates rose by 2 percentage points year on year.

Booking enquiries via large online travel platforms confirm Germany's considerable resilience as a travel destination in times of crisis. While Expedia recorded a decline in search queries across Europe in March / April, the fall for Germany (2.6 per cent) was significantly below the European average of 4.2 per cent. At the same time, air ticket bookings to Germany increased by 20.5 per cent in the period from 28 February to 3 May 2026.

Overall, Tourism Economics forecasts a 1.9 per cent increase in overnight stays by European visitors to Germany in 2026.

Overseas

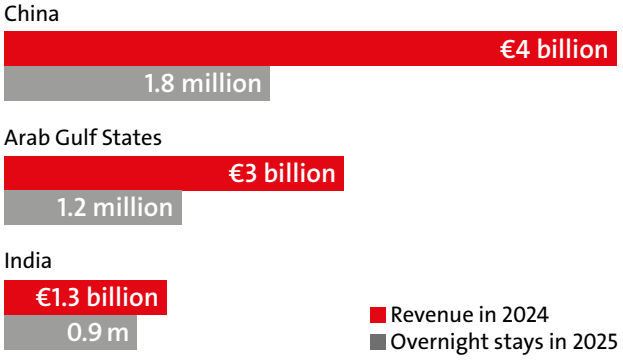
A more varied picture was evident up to mid-May in the overseas markets. In a survey of tour operators and DMCs worldwide conducted by the European Travel Association (ETOA) between 1–8 May 2026, a third of respondents reported significant impacts from the conflict in the Middle East that required substantial operational adjustments.

At the same time, the situation in the largest overseas markets has largely stabilised just three months after the outbreak of war in the Middle East, and no significant price rises have been recorded for flights from North America, China or India. Visa applications for the Schengen Area from China were up 20 per cent year on year in the first quarter.

Based on available flight data and the assumption that the conflict will last four months, the GNTB has revised its forecast for 2026 from a 5 per cent increase from the GCC states, predicted before the war began, to a 14 per cent decrease. The year-on-year decline from Israel could reach around 18 per cent. Tourism Economics forecasts a rise of 4.5 per cent in inbound tourism to Germany in 2026 for the overseas markets in total.

Unlocking growth opportunities by increasing marketing in key markets for the future

A rapidly growing middle class with money to spend promises further long-term growth potential for inbound tourism to Germany. Accordingly, the GNTB intends to further expand its business development activities in particularly relevant overseas source markets.





The GNTB is also reopening its offices in Toronto, São Paulo and Singapore in 2026.

Efficiency gains and more memorable travel experiences with AI

Within just a few years, AI applications have established themselves as the standard in the travel industry. According to research by Phocuswright, 83 per cent of travel companies were already using generative AI in 2025 to find and select products and services and put together a package for customers. On the customer side, 39 per cent of US travellers, for example, actively used AI to plan their trips in 2025, an increase of 11 percentage points year on year.

And the shift to AI is gathering pace. In 2025, Amadeus examined how technology is set to change user expectations and travel patterns worldwide over the next ten years. It found that 42 per cent of AI users see it as a means to save time when planning, 37 per cent expect tailored recommendations, 36 per cent want to discover new destinations and 35 per cent want to feel more confident about the travel decisions they make.

For inbound tourism to Germany, this means that the GNTB aims to enhance the visibility of tourism offerings across all channels in 2026 by expanding the Knowledge Graph, which is based on open data. In addition to the quantitative expansion of the available data sets, it is the qualitative improvements from linking to MCP servers that will make the difference in this respect.

The GNTB's AI-generated brand ambassador @EmmaTravelsGermany will expand her scope of activity using data from the Knowledge Graph.

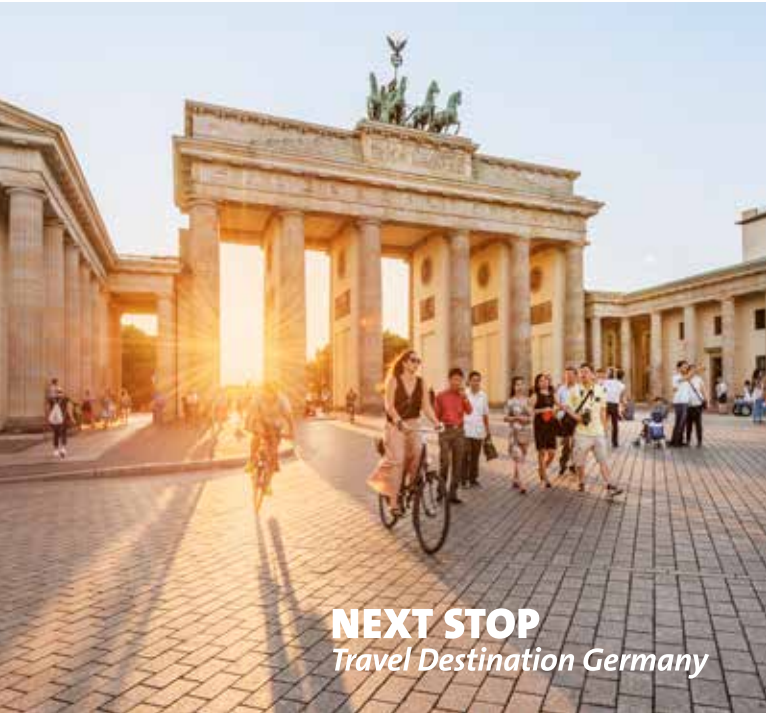
Autonomous end-to-end customer journey with no human contact is now possible

Open Claw enjoys record use despite considerable security risks

API-first and machine-readable data determine visibility by AI agents

GNTB campaigns focus on cities, culture and experiences in nature

The GNTB is utilising four global campaigns to further define the Destination Germany brand in 2026. All are centred around Germany's strong position as a destination for city breaks and cultural travel, its strong culture of hospitality, and the huge demand for authentic experiences, culinary delights and nature. They aim to attract new customers from high-potential markets while encouraging regular visitors to keep coming back to Germany.



Next Stop: Travel Destination Germany

According to a recent study conducted exclusively for the GNTB by Appinio, city breaks are one of the top three interests among international travellers worldwide. Germany scores highly with its rich, cosmopolitan cultural scene and its multifaceted urban life, and is the number 1 cultural destination for Europeans making international trips.

The GNTB has identified the importance of this segment and launched the inspiration campaign 'Next Stop: Travel Destination Germany'. Running on Expedia's channels, the campaign showcases life in the country's major cities and the unique charm of its smaller towns. It will appear on Expedia in three international waves in May, July and September 2026, and the marketing mix will also feature a content hub, audience-specific storytelling with brand videos, innovative promotional tools on Netflix, social media activities and press and B2B communication.

Culinary Germany



According to the study conducted by Appinio on behalf of the GNTB, experiencing local cuisine is the third most frequently mentioned activity for people taking city breaks or cultural trips, after exploring cultural heritage and sightseeing. The GNTB's 'Culinary Germany' campaign aims to position Germany globally as an attractive, rich and varied culinary destination with a strong culture of hospitality.

It draws on the close link between Germany's restaurants, cafés and hotels and its culinary and cultural traditions. 'Culinary Germany' portrays the subject of food in the context of regions and experiences with a focus on seasonal highlights and regional specialities.

At the heart of the campaign is a widget that takes users on an inspirational culinary journey through Germany. Based on individual interests and requirements, it presents relevant regions as well as specific recommendations from the GNTB Knowledge Graph – including POIs, restaurants, hotels, food events and wine festivals. In addition to the widget, there will be a new campaign film, social media activities, programmatic advertising, newsletters, tours for influencers and journalists, and press and B2B communication.



Feel Good – make lasting memories

One objective of the GNTB's sustainability strategy is to position Germany as a destination with a wide variety of certified sustainable products and services. The 'Simply Feel Good' campaign, which has won multiple international awards, shows how it is possible to enjoy a varied holiday in harmony with the environment – whether in nature or in the city. The GNTB has relaunched the campaign under a new slogan, 'Feel Good – make lasting memories', in 2026.

Season's Greetings from Germany



Christmas traditions are one of Germany's hallmarks and provide tourist experiences that are in high demand internationally. Accordingly, almost one in five overnight stays in Germany takes place during November or December. The most popular destinations are towns and cities with particularly large, varied or famous Christmas markets, such as Munich, Cologne, Frankfurt and Nuremberg, but smaller towns and regions also benefit.

Every year, the GNTB puts the special festive atmosphere that can be experienced in towns and cities large and small at the centre of its 'Season's Greetings from Germany' campaign. In 2026, it will once again use this to promote travel to Germany in the festive season, supporting the hotel and retail sectors in towns and cities. A widget on the campaign's microsite allows users to specifically search for the many Christmas markets across Germany, with data provided by the GNTB Knowledge Graph.

Extraordinary experiences in Germany

Alongside its theme-based campaigns, the GNTB will once again showcase special occasions and themes.



150 years of the Bayreuth Festival

Germany has firmly established itself as the number 1 cultural destination worldwide for European travellers. In 2026, the GNTB is marking the anniversary of the Bayreuth Festival by promoting the towns, cities and regions where Richard Wagner lived and worked, or which are associated with his work, as flagship destinations within Germany's cultural landscape. This includes Bayreuth itself, with its festival hall and the Margravial Opera House, the only German town to make it onto the 2026 list of '52 Places to Go' compiled by the New York Times. Other travel tips, such as Leipzig, Dresden, Eisenach and Nuremberg, highlight the wide variety of Wagner-themed events on offer across Germany.



Family & Friends in Nature

According to IPK International, the popularity of rural getaways with European visitors to Germany rose by 4 per cent in 2025, with the number of holidays in the mountains and by the water also increasing. The GNTB embraces this trend with a theme that focuses on activities with family and friends in nature, such as hiking, cycling and water-based pursuits. A dedicated GNTB microsite features a search tool for articles, for example on family-friendly hotels, farmstay holidays, treetop trails and wildlife parks. A new outdoor widget, based on data from the Knowledge Graph, provides a good overview of all tourism offerings.



IGA 2027 in the Ruhr area

The International Garden Show (Internationale Gartenausstellung or IGA), one of the largest garden festivals in the world, is held in Germany every ten years. Following the last IGA in Berlin in 2017, it will be the turn of the Ruhr area in 2027, which will present itself as the world's greenest industrial region during the IGA. As part of this event, the Ruhr Valley Cycle Route will be expanded and upgraded. The GNTB is cooperating with the IGA's organisers and with the German National Garden Show to promote these major events internationally. In 2026, the GNTB is already using this theme to provide travel tips, particularly in the neighbouring markets of the Netherlands and Belgium, as well as in the UK, with the aim of extending the length of stay of the anticipated 2.6 million visitors.

Key topics and targets from the perspective of the German Bundestag's Tourism Committee

The Tourism Committee uses initiatives, expert input and enquiries to raise public awareness of the sector's importance – not only in respect of inbound tourism but also for travel within Germany and outbound tourism. The committee supports efforts to strengthen Germany as a tourist destination by addressing issues such as access to, and retention of, workers, digitalisation, fair competition and consumer protection. Promoting sustainable tourism, the conservation of resources and green transport are further areas of focus.

The tourism spokespersons representing the political parties in the Bundestag explain what the most relevant topics in relation to inbound tourism are in 2026, and which tasks they consider to be priorities for the future.

“Millions of dedicated employees and entrepreneurs across the sector, working alongside creative players such as the GNTB, are doing a marvellous job to ensure that Germany is, and remains, successful in the growing tourism markets.”



Anja Karliczek, Chairwoman of the Tourism Committee (CDU)

Thanks to its beautiful towns, cities and regions, its well-managed natural landscapes and its outstanding infrastructure, Germany has a strong appeal as a tourism destination and is held in high regard by visitors from across the world. Millions of dedicated employees and entrepreneurs across the sector, working alongside creative players such as the GNTB, are doing a marvellous job to ensure that Germany is, and remains, successful in the growing tourism markets. But all this does not come for free – it requires effort, investment and conviction. As Chairwoman of the German Bundestag’s Tourism Committee, I would like us to provide greater support once again to those who sustain this country and its tourism sector. A better and fairer competitive arena is essential for this. And as a bridge-builder between the worlds of politics and business, I want to ensure that the tourism sector receives the public recognition and appreciation it deserves.

“We are providing certainty and have secured a high level of federal support for the German National Tourist Board.”

Our aim is to further boost Germany’s overall competitiveness as a tourist destination. And this is exactly the focus of the new national tourism strategy. A package of measures for the aviation sector designed to strengthen Germany’s transport links and connections has been launched, and its implementation is ongoing. Government-imposed costs will be capped and gradually reduced, for example aviation tax.

Visitors from abroad also need reliable transport options within Germany. With this in mind, substantial investment is now being made in roads, railways and waterways, and key new construction projects are being fast-tracked. We want to continue to position Germany as an attractive and modern travel destination in the international market. We are providing certainty and have secured a high level of federal support for the German National Tourist Board. It is now in a position to step up its invaluable and innovative work.



Michael Kießling, spokesperson of the CDU / CSU parliamentary group in the Tourism Committee

“We support the invaluable work of the GNTB, which contributes to Germany’s competitiveness through its international brand activities and data-driven marketing.”

Inbound tourism to Germany is facing key tasks in 2026. Transport, digitalisation, the use of artificial intelligence and the ability to attract and retain skilled labour determine how attractive Germany is for international visitors. Travellers expect a destination that offers ease of access, seamless processes and skilled workers.

Efficient and climate-friendly transport is the foundation for this. We aim to strengthen interconnected transport systems and make it easier to travel to, and continue travelling within, Germany, thus boosting the country’s appeal as a destination. Digital apps and AI-assisted systems are improving the processes associated with information provision, bookings and other services along the entire journey. They are reducing the burden on businesses, increasing efficiency and creating space for an even warmer welcome and a personal touch.

Attracting, training and retaining workers for the long-term is a top priority for us. Good working conditions, continuing professional development and digital skills safeguard quality standards in the sector and its future success. We support the invaluable work of the GNTB, which contributes to Germany’s competitiveness in Europe and around the world through its international brand activities and data-driven marketing.



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

“We are committed to further easing the burden on our diverse hospitality sector in order to continue to protect our diverse culinary landscape, especially in rural areas, and provide opportunities for tourists and the local population to meet.”



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

The German tourism industry is suffering above all from excessive bureaucracy and policy-driven costs. Aviation tax, carbon pricing and, in particular, high energy prices are putting increasing pressure on our tourism industry. Tackling this is a priority. We aim to abolish unnecessary regulation and record-keeping, as well as the aviation tax and carbon pricing. We want to put a stop to the artificial inflation of air travel costs!

We are committed to further easing the burden on our diverse hospitality sector in order to continue to protect our diverse culinary landscape, especially in rural areas, and provide opportunities for tourists and the local population to meet.

We want to reduce VAT on drinks to 7 per cent and finally give the tourism sector the entrepreneurial freedom it needs.

Germany should continue to be seen as a cosmopolitan and sustainable tourist destination in the future and maintain a pioneering role in this regard. The GNTB is making a key contribution to this through its invaluable work. To ensure that inbound tourism is climate-neutral and sustainable, we must support the expansion of climate-friendly modes of travel and local transport. We need a genuine transport revolution that actively takes tourism into account. We want to make rail the top mode of travel in Europe. By strategically expanding cross-border services, including sleeper trains, we aim to shift short- and medium-distance journeys from road and air onto the railways. This is also how we aim to improve Germany's connectedness overall. With regard to aviation and shipping, policymakers and industry will need to step up their joint efforts to introduce sustainable green fuels.



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

> **"To ensure that inbound tourism is climate-neutral and sustainable, we must support the expansion of climate-friendly modes of travel and local transport. We need a genuine transport revolution that actively takes tourism into account."**



Katalin Gennburg, Spokesperson on Construction, Urban Development and Tourism Policy for Die Linke

The tourism sector is influenced by many factors, including decent living conditions and the natural environment at the tourism destinations. That is why adequate wages in the sector and diversity in the local economy are so important, as only places with good quality of life will appeal to both visitors and residents. Consequently, social and environmental stability are key issues for current and future tourism policy, and the tourism industry has a responsibility in these areas too. Whether it is exploitation by digital platforms or overtourism in general and in individual locations, there are considerable challenges to overcome in policymaking and regulation. Given the sector's importance to the economy, the German Bundestag must effectively manage tourism policy and put regulations in place that give municipal authorities the framework needed for travel to remain, for everyone, what it essentially is: a wonderful and positive thing.

> **"Consequently, social and environmental stability are key issues for current and future tourism policy, and the tourism industry has a responsibility in these areas too."**

Challenges from the perspective of the regional tourism organisations

Where do you see the greatest challenges and opportunities for the development of Germany's inbound tourism industry in 2026?

Baden-Württemberg

With the global context becoming increasingly challenging, we keep a close eye on our markets and regularly reassess them. We retain a strong presence in our traditional key source markets, but we are also reacting to global changes and adding new markets to keep track of. Overall, international marketing remains a priority for us. Accounting for around 20 per cent of overnight stays, foreign visitors remain a key factor in the sector's success, generating significant added value.



Christine Schönhuber, Managing Director of Tourismus Marketing GmbH Baden-Württemberg

Bavaria



Barbara Radomski, Managing Director of Bayern Tourismus Marketing GmbH

The greatest opportunity for inbound tourism to Germany in 2026 lies in even closer strategic collaboration. In Bavaria, this means maintaining a close relationship with our partners, for example in the Dutch market. Here, we are pooling our strengths in a joint campaign aimed at the tourism trade and at end customers. A strong, united front by all Bavarian regions creates visibility, efficiency and influence, and this is a model that we will resolutely pursue in the future.

Berlin

Burkhard Kieker: The visitor economy in Berlin continues to face challenges in 2026. These include low consumer confidence, geopolitical tensions and as yet inadequate international flight connections. Despite this demanding environment, Berlin is successfully positioning itself as an outstanding cultural destination and as an inspirational city that is synonymous with freedom.

Sabine Wendt: In 2026, we are continuing to shape the future of tourism to Berlin in partnership with the local tourism sector. The focus is on sustainability, digitalisation and linked-up working. We are working hand in hand with the industry to specifically strengthen Berlin's competitiveness as a responsible event and travel destination, mainly by continuing our Foresight project, through the tourism data hub and by using the Berlin Paper as a strategic framework for attracting and hosting major events.



Sabine Wendt and Burkhard Kieker, Managing Directors of visitBerlin

Brandenburg



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

Brandenburg's appeal as a destination, primarily based on its nature-focused offerings and abundance of lakes and rivers, is a draw for international visitors too. The linking of lakes in the Lusatian Lakeland region, which will be completed this summer, adds yet another reason to visit. Alongside the natural environment, culture plays an important role across the region. Cross-border collaborations have a long tradition in tourism to Brandenburg and help to raise our international profile. There is also further potential for growth through better transport links – both air and rail – in the Berlin metropolitan region.

Bremen

The biggest challenges for tourism to Bremen and Bremerhaven in 2026 are international visibility, the provision of attractive offerings and events, and the systematic implementation of sustainable and digital standards. But this is also where significant opportunities are to be found, primarily through the targeted use of artificial intelligence. The two cities' new tourism strategies incorporate these trends.



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

Hamburg



Michael Otremba, Managing Director of Hamburg Tourismus GmbH

Visibility in LLMs is an increasingly relevant tool for boosting demand in a tangible way. It is possible to increase visibility, credibility and bookings by structuring destinations, offerings and stories so that they are accessible to AI. The opportunity here is extensive personalisation, from inspiration to conversion, perfectly tailored to an individual's travel motivation, budget and reason for travel. Furthermore, our transport infrastructure must be efficient and effective, since accessibility and reliability are key arguments in travel planning and important factors for customer satisfaction.

Hessen

International visitors have very high expectations when it comes to AI-generated travel planning. It should be available at any time and provide reliable information. As a regional tourism organisation, this presents a great opportunity for us. Processing, structuring and supplementing tourism data so that it can be used by AI systems will be essential in this context. The strategic development of digital and data skills is the basis for forward-looking tourism marketing across all levels of Hessen's tourism sector.



Herbert Lang, Head of Tourism, HA Hessen Agentur GmbH

Mecklenburg-Vorpommern



Peter Kranz, Managing Director of MV Tourismus GmbH

One of the tasks of MV Tourismus GmbH is to position Mecklenburg-Vorpommern in the international market. Our international marketing strategy, which mainly targets Scandinavia, Switzerland, Austria, the Netherlands and Poland, provides the basis for this. The geographical location of our region is both a challenge and an opportunity. Topics such as transport links and sustainable travel to Mecklenburg-Vorpommern are key considerations. It is precisely because our region has so much to offer in terms of the natural environment and high-quality cultural experiences that we are committed to close collaboration with our partners, including the GNTB.

Lower Saxony



Meike Zumbrock, Managing Director of Tourismus Marketing Niedersachsen GmbH

Inbound tourism to Lower Saxony remains a challenge in 2026 due to volatile demand, high price sensitivity and structural bottlenecks. It is, therefore, all the more important to highlight our strengths, such as nature tourism and active holidays, which offer exactly what many international visitors are currently looking for. At the same time, we are actively embracing digitalisation in order to boost our position in the international market. The Niedersachsen Hub and the one.intelligence platform enable us to generate data and content structures that can be used across the region, support the operational activities of our partners in the destinations and facilitate international marketing. We firmly believe that linking these two aspects provides the greatest potential for sustainable growth in inbound tourism.

North Rhine-Westphalia



Dr Heike Döll-König, Managing Director of Tourismus NRW e.V.

The number of international overnight stays in North Rhine-Westphalia in 2025 was higher than ever before, even without a major event such as UEFA EURO 2024. MICE and leisure travel have both enjoyed strong growth and represent the basis of resilient tourism. Nevertheless, we aim to provide additional impetus in 2026 by focusing on the trend for gravel cycling and showcasing places beyond the tourism hotspots, as market research has shown that more than half of Europeans actively look for undiscovered destinations. We also took advantage of the GTM being held in North Rhine-Westphalia again. Buyers from around the world were able to see for themselves why North Rhine-Westphalia should be right at the top of their list!

Rhineland-Palatinate



Stefan Zindler, Managing Director of Rheinland-Pfalz Tourismus GmbH

In the face of a volatile global situation, it is more important than ever to focus on our own targets and opportunities. We need to be flexible in our response to developments, we should have the courage to explore new avenues and we should resolutely play to our strengths. This is precisely where our updated assessment of international source markets for Rhineland-Palatinate comes in. Our focus is on nearby European markets, where we can score highly with the kind of authentic, tailored experiences that are increasingly important to our German and international visitors. And our marketing needs to reflect this. Going forward, data-driven marketing will enable us to engage with visitors in an even more personalised way, from initial inspiration through to information provision and booking.

Saarland



Birgit Grauvogel, Managing Director of Tourismuszentrale Saarland GmbH

In 2026, the Saarland will yet again need to keep pace with the rapid development of new AI applications in management and customer services. This will require us to develop tailored solutions that are the perfect fit for our target groups. But we also have a golden opportunity to position Saarland as an attractive convention and conference venue. Now that we have established the Convention Bureau Saarland, we can create sustainable formats and offer top incentives. A particular highlight will be Germany's Special Olympics National Games, which we will proudly host from 15–20 June 2026.

Saxony

Inbound tourism to Germany will once again be dominated by the volatile global situation in 2026, which will require a flexible approach. Yet the international market remains a key driver of growth. Digitalisation and AI have an important role to play in targeted marketing, personalised offerings and efficient processes. Open data is essential to international visibility. Strong partnerships are also important, as they allow us to create attractive offerings and boost tourism as a key economic factor.



Veronika Hiebl, Managing Director of Tourismus Marketing Gesellschaft Sachsen mbH

Saxony-Anhalt



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

In 2026, the German inbound tourism sector faces the challenge of holding its own in a highly competitive international arena while responding to cost sensitivity, sustainability and changing travel habits. Major cultural events and authentic venues represent the greatest opportunities. The reopening of the Stiftsberg in Quedlinburg and the Bauhaus anniversary in Dessau are highlights with international visibility that will raise our profile and inspire both new and existing target groups to visit Saxony-Anhalt.

Schleswig-Holstein

Tourism in the 'true north' is still dominated by domestic visitors, who account for around 95 per cent of all visitors. That is why it is so important to target nearby markets abroad. Inbound tourism to Schleswig-Holstein is on the up, and Denmark remains the most important international source market. In addition to a sense of *hygge*, Danish and international visitors expect safety, reliable infrastructure and digital payment methods as standard. There are clear opportunities here, but digital solutions must be well-considered and consistently implemented across all levels. Accordingly, Tourismus-Agentur Schleswig-Holstein's new strategy, scheduled for 2026, will include an extensive digital agenda.



Stefan Borgmann, Managing Director of Tourismus-Agentur Schleswig-Holstein GmbH

Thuringia



Christoph Gösel, Managing Director of Thüringer Tourismus GmbH

International visitors expect clearly structured and exciting offerings that are easy to plan. Thuringia is actively responding to this and to the demand for culture and short stays. Our Travel Summit event boosts networking between our international trade partners and the players in Thuringia. The Thuringian events calendar brings together all events across the state in one place for the first time and feeds relevant content into the GNTB Knowledge Graph via the ThüCAT data pool. This ensures clear guidance for visitors, complements existing structures and adds impetus for further growth in inbound tourism.



Wine tasting in the vineyards of Kloster Eberbach



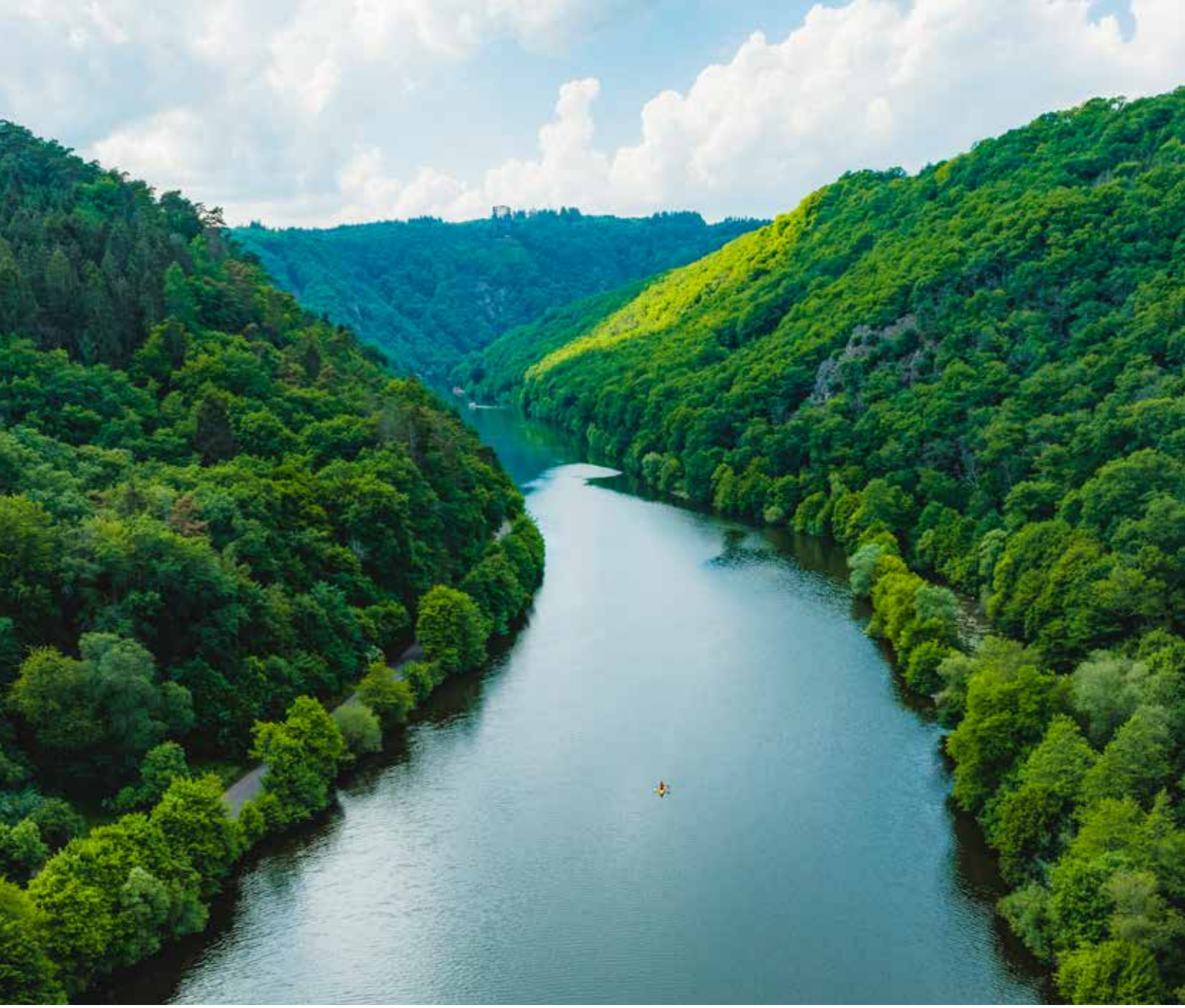
04

MAKING IN-BOUND TOURISM more sustainable

Striking a balance between the interests of the economy, the environment and society is a key concern when preparing tourism for the future. After all, tourism that ignores these core aspects of sustainability will be the architect of its own downfall in the long run. Accordingly, the GNTB defined sustainability as an area of action for Destination Germany's international competitiveness more than a decade ago.

The German government's national tourism strategy clearly supports this approach. On this basis, in 2025 the GNTB promoted Germany as a service-oriented, quality travel destination with high economic value creation and positioned the country as a destination that facilitates responsible travel.

To this end, specific measures, projects and initiatives were implemented across the organisation, covering everything from business intelligence and global marketing to internal processes.



Sustainability in global tourism

Germany builds on its strong competitive position

> **“ … It is therefore essential that tourism is climate-friendly, environmentally friendly and compatible with the needs of nature and society. Only if regions maintain a good quality of life will travellers want to visit and workers want to settle there. … The federal government will help regions and businesses to take the environmental and social sustainability of tourism into account. At the same time, it will exercise the necessary judgement so as not to undermine the competitiveness of businesses … ”**
>
> The German government’s national tourism strategy, 28 January 2026

Unspoilt nature is essential to the future viability of tourism. In the face of climate change, the tourism industry is confronted with the challenge of enabling climate-friendly travel while protecting the natural beauty and environment of destinations.

Nevertheless, against a backdrop of new geopolitical challenges, international interest in sustainability issues has waned slightly since peaking during the coronavirus pandemic. This trend is reflected in the quarterly survey by the Global Web Index (GWI) in 54 countries. Whereas 45.6 per cent of respondents stated in the second quarter of 2021 that environmentally sustainable behaviour was important to them, this figure had fallen to 40.6 per cent in the second quarter of 2025. Over the same period, the willingness to pay a premium for an environmentally friendly product fell from 58.6 per cent to 57.2 per cent.

Destination Germany’s positioning in the international market in 2025

In 2025, Germany once again proved it scores highly for environmental protection and climate action in an international comparison, retaining its fourth place ranking in the SDG Index, which measures countries’ progress in reaching the UN’s climate targets. In a comparison of 27 countries by IPK International, Germany ranked third for its offering of tourism products in relation to climate action, environmental protection and sustainability.

Relevance of sustainability aspects for inbound tourism to Germany

For travellers and local residents alike, the core of the Destination Germany brand includes attractive cities and unspoilt natural spaces and landscapes that offer peace and relaxation. Smoothing out seasonal peaks in demand, promoting regional products and extending the length of stay are key strategies for increasing the value added by inbound tourism.



The GNTB's activities in 2025

Business intelligence

Detailed data analysis to display the carbon footprint in the Sustainable Travel Trends to Germany dashboard
In its Sustainable Travel dashboard, the GNTB analyses and evaluates data on transport-related emissions per year and source market. This has shown that carbon and carbon-equivalent emissions in kilograms per international visitor to Germany have fallen slightly since 2019. This could be due to changes in the modal split in transport, optimisations to transport routes or the use of more fuel-efficient fleets.

Market-specific research into demand
On behalf of the GNTB, IPK International carried out research in September 2025 to establish the extent to which sustainability and / or the lack of sustainable offerings might be a reason not to visit a destination.

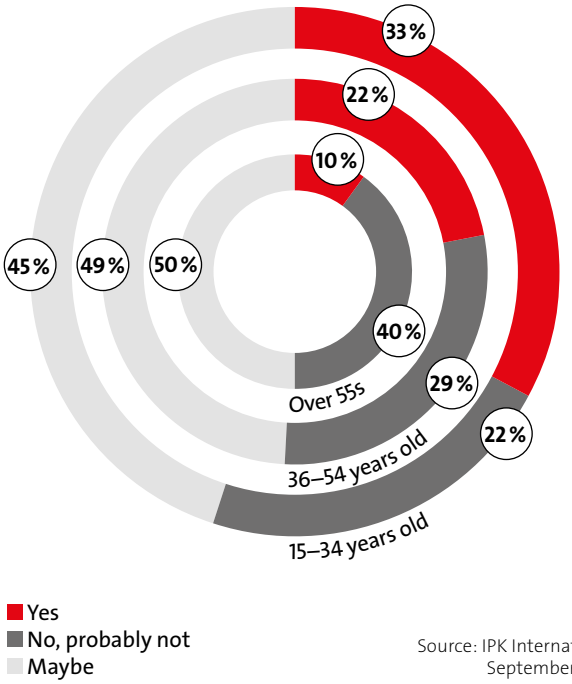
It showed that 74 per cent of international travellers generally consider measures relating to sustainability, environmental protection and climate action to be important or very important. Particularly relevant in this context is that almost a quarter (23 per cent) of respondents worldwide would exclude destinations that have few or no sustainable offerings, while 48 per cent would consider excluding them. Sustainable offerings are clearly an important factor when choosing a destination.

The survey was designed to enable analysis by country and by age group. Its findings show that American and Asian travellers are more likely to consider excluding destinations due to a lack of sustainable offerings (30 per cent) than European travellers (19 per cent).

Equally clear and revealing is the variation in awareness of sustainability across different age groups.

"WOULD YOU GENERALLY EXCLUDE DESTINATIONS THAT HAVE FEW OR NO SUSTAINABLE OFFERINGS?"

(international travellers worldwide)



Source: IPK International, September 2025.

The GNTB supports Europe-wide survey on inclusion
The targeted development and marketing of inclusive tourism offerings requires robust data. Until now, such data has not been available across borders, nor has it been up to date or of sufficient quality. The international market research company MMGY launched the multi-client survey 'Portrait of European Travellers with Mobility & Accessibility Needs' in 2025. The European Network for Accessible Tourism (ENAT) acted as an advisor during the survey's development. In addition to conceptual and financial support, the GNTB also provided experts who contributed the GNTB's expertise to the survey's design.

Network and knowledge sharing

The GNTB's national and international network is able to offer extensive sustainability expertise that has been acquired over many years. The organisation used a range of dialogue formats to share the accumulated knowledge in 2025.

EXPERT INSIGHTS, HIGH-PROFILE SPEAKERS AND PRACTICAL EXPERIENCE IN THE SERVICE OF SUSTAINABILITY AND INCLUSION



Accessible Tourism Day
in the City Cube at Messe Berlin
→ See p. 32 for more



GNTB Sustainable Tourism Days
on 24 September in Frankfurt am Main
→ see p. 34 for more

GNTB



Destinations for All
world summit in Turin
→ see p. 32 for more





Global marketing

As part of its global theme-based campaigns and initiatives, the GNTB promoted products and tourism offerings that support responsible travel.

FEEL GOOD

GNTB lead campaign: promotion of certified destinations and products; tips and inspiration for responsible travel; interactive campaign microsite featuring a map and an emissions calculator for travel planning

STAY LONGER

Global marketing initiative: longer stays reduce the carbon footprint per day of travel, boost economic value creation and can help to reduce seasonal and local peaks

→ For more on global marketing campaigns, see p. 36 onwards

Further examples of international marketing activities with a sustainability focus

Spain: 'sustainable city breaks' press tour
Czech Republic: content collaboration with woremgo.tours
Italy: advertorial in La Repubblica: Parchi e riserve naturali, i tesori della Germania
USA: press tour with Forbes magazine and Elliott Report (online medium) on the topic of sustainability and hiking
Slovakia: influencer trip with content creator Boris Michaliček in the Black Forest
Austria: online article on besserlaengerleben.at: cycling on disused railway lines in the Bergisches Land region
Switzerland: media collaboration with advertorial on sustainable / climate-friendly Destination Germany
Spain: presentation of a sustainability award for journalists in partnership with the German Chamber Network; publication of two articles in El País, Spain's largest daily newspaper

The GNTB supports climate-friendly travel to Germany

In the modal split for transport types, rail and coach stand out in international comparisons for their lower carbon and carbon-equivalent emissions per passenger kilometre. Which is why the GNTB supports the development and marketing of relevant tourism products in markets from which Germany is easily accessible by coach and train while offering a comparable level of comfort and convenience.

"The global rise in traffic and the resulting emissions are taking their toll on the climate, the environment and people's health. We therefore need balanced transport solutions that meet travellers' transport needs and limit or mitigate the negative impacts of travel on the climate, the environment and health."

The German government's national tourism strategy, 28 January 2026



AUSTRIA

Cross-media sales partnerships with four market-leading coach operators and high-reach Austrian media in the form of advertorials in print and online

17th edition of the joint Sparschiene campaign with ÖBB and Deutsche Bahn; campaign microsite on www.germany.travel; social media advertising, native advertising formats and OOH advertising

SWITZERLAND

Rheinalp campaign website and DOOH advertising to inspire rail travel to Germany; supported by POS videos in SBB travel centres; ads on sbb.ch and in the SBB app

Collaboration with two Swiss coach operators to promote Christmas markets in Germany

NETHERLANDS

Collaboration with coach operator OAD to promote multi-day coach tours to Germany

BELGIUM

Collaboration with Belgian coach travel association FBAA

DENMARK

Collaboration with Danish coach operators to promote Christmas markets in Germany and the festive season in general

Internal and external communication

EmpCo

The European Union's Empowering Consumers Directive (EmpCo) includes extensive rules to prevent misleading statements about sustainability and the environment, and to reliably protect consumers from greenwashing. This Directive was transposed into national law on 12 February 2026. The onus now is on companies to act accordingly, especially in marketing and communications.

The GNTB organised several events in 2025 to prepare its managers and employees, and its partners and members, for the new requirements and to ensure that they are implemented in accordance with the law. Organised in collaboration with experts, the webinars provided a clear overview of the key points of the EmpCo Directive and highlighted areas that will require particular attention in future communications. In 2025, the GNTB drew up a specific guideline to raise awareness of the requirements of the EmpCo Directive, and this was published in early 2026.



Initiatives within the organisation

EMAS

The Eco-Management and Audit Scheme (EMAS), or EU Eco-Audit, was developed by the European Union to systematically improve companies' environmental performance, for example in terms of energy and material efficiency, to reduce harmful environmental impacts and risks, and to increase legal certainty for organisations.

A detailed procedure guides companies step by step from context analysis, mission statement and environmental programme to environmental statement, external verification and entry in the EMAS register. The GNTB's head office in Frankfurt first underwent an EMAS audit in 2024, and passed the follow-up audit with flying colours in 2025.

The guiding principle of environmental management and the takeaways from the certification process will be implemented in the GNTB's foreign representative offices.

Green Globe

The GNTB passed the Green Globe recertification process for the twelfth time for the reporting period 2024 / 25. Green Globe is a globally recognised certification for the travel industry. Participants must document their activities covering sustainable management and social / economic, cultural heritage and environmental indicators on the Green Globe system. An accredited, independent auditor conducts an on-site assessment of the organisation.

The GNTB has achieved the highest standard in the certification process for two years in a row and can now call itself a platinum member.



Nebra Ark Museum in
Saxony-Anhalt



05

INTERNAL PROCESSES IN 2025

and organisational structure in 2026

The GNTB's administrative unit supports day-to-day operations at the organisational and structural level.

Financial management is optimised on an ongoing basis to ensure cost discipline and a focus on operational tasks. HR planning and management are continually adapted to changing requirements, for example due to demographic change, New Work and new tasks arising from the digital transformation.

Digitalisation is an overarching topic that ensures that the structure necessary for day-to-day operations is in place, links this to financial control and governs the management of external relationships.

Administration

Financial management

The GNTB's financial situation in 2025 was primarily shaped by the federal budget, which was only approved in September, and the associated funding restrictions. Marketing spend was adjusted accordingly, for example through the timing of campaign starts over the course of the year.

Grant from the BMWE
The most important line item for income in 2025 was the grant from the Federal Ministry for Economic Affairs and Energy (BMWE), which provides the financial footing for the ongoing work of the GNTB and its 19 international offices.

Income from services
In 2025, the GNTB was able to further increase its income from services and member premiums and contributions, generating excellent results, in particular from major events and digital marketing.

Marketing spend
Global marketing of Destination Germany accounted for around two-thirds of all spending. Stable funding compared to the previous year and an increased level of self-generated funds created additional scope for action on the operational front.

Other operating expenses
Operating expenses were subject to strict cost discipline, which meant that overall expenditure was stable year on year despite inflation and rising infrastructure costs. The GNTB invested the savings resulting from the continuous review of existing contracts and the digitalisation of processes into its digital infrastructure and system security.

Human Resources, Legal, Central Services

HR
The employment plan for 2025 covered a total of 153.1 positions and thus remained unchanged. Taking part-time employees into account, these positions are held by around 200 employees. The organisation's international structure is reflected in an almost even distribution of positions:

- 76.1 positions in Germany
- 75 positions abroad
- 2 positions on the Management Board

The stable number of positions facilitates HR planning and is indicative of a consistent approach in the GNTB's organisation.

The vacant position of Commercial Director was filled on 1 November 2025. Since then, Andrea Bartl has been responsible for the following departments: Human Resources, Law & Central Services, Financial Management and IT & Logistics.

As a forward-looking organisation, the GNTB continues to support modern forms of working and has agreed guidelines with the employee representatives accordingly. This helps with the recruitment of skilled labour, irrespective of where they live, increases the GNTB's appeal as an employer and makes it easier for employees to balance work and personal life. There is also the positive effect of fewer carbon emissions.

Like any other organisation, the GNTB is feeling the impact of demographic change. The GNTB's HR department is countering this trend through traditional recruitment, internal transfers and tailored professional development options. This is supported by structured knowledge management via systems such as SharePoint, the Znuny ticketing system and the database in the MACH system. The incorporation of new expertise, for example in cyber security, facilitates upgrades to internal workflows. The department is thus providing support for the organisation's strategy and personnel planning for the coming years.

Training
The 14 young recruits – two degree apprentices, nine apprentices and three trainees – showed great commitment and made an active contribution to the GNTB's success in 2025. In total, six talented and committed young prospects were recruited for the organisation's training programmes in 2025 and supported throughout.

The degree apprentices offered a useful combination of theoretical and practical knowledge, and brought fresh ideas to the projects. The apprentices demonstrated their skills in the fields of tourism and marketing communications, and went on to become indispensable members of the team. The trainees used the opportunity to gain experience in one of two areas of the organisation and to advance their careers in a targeted manner. In March, the GNTB was able to offer one of the trainees a job at the office in Vienna.

Particularly worth noting is the variety of training placements on offer, ranging from traditional administrative areas to future-oriented roles in digitalisation

GNTB financial overview: sources and appropriation of funds[1)]

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	**2025**	**%**	2024	%	2023	%	2022	%	2021	%	2020	%
Income from services	**8,866**	**17.7**	8,437	17.0	7,810	15.9	7,157	15.2	4,935	9.9	4,122	10.8
Grants from the BMWE	**40,278**	**80.6**	40,595	81.6	40,522	82.6	39,052	83.2	44,126	88.5	33,399	87.3
Grants and contributions from members	**857**	**1.7**	719	1.4	725	1.5	749	1.6	782	1.6	732	1.9
Income from GNTB budget[2)]	**50,001**	**100.0**	**49,751**	**100.0**	**49,057**	**100.0**	**46,958**	**100.0**	**44,843**	**100.0**	**38,253**	**100.0**
Income from special projects[3)]	**0**		0		0		135		116		123	
Total income (consolidated)	**50,001**		**49,751**		**49,183**		**47,093**		**49,959**		**38,376**	
Additional income from non-cash contributions	**914**		**1,591**		**904**		**927**		**817**		**416**	

Expenditure	**2025**	**%**	2024	%	2023	%	2022	%	2021	%	2020	%
Personnel expenditure for marketing and administration	**13,332**	**26.7**	13,189	26.5	12,891	26.3	12,659	27.0	12,453	25.0	11,984	31.3
Other operating expenses	**3,560**	**7.1**	3,481	7.0	3,173	6.5	3,279	7.0	3,110	6.2	3,006	7.9
Capital investment	**68**	**0.1**	739	1.5	878	1.8	409	0.9	357	0.7	196	0.5
Marketing spend	**33,041**	**66.1**	32,330	65.0	32,115	65.4	30,611	65.2	33,923	68.1	23,067	60.3
Expenditure from GNTB budget[2)]	**50,001**	**100.0**	**49,739**	**100.0**	**49,057**	**100.0**	**46,958**	**100.0**	**49,843**	**100.0**	**38,253**	**100.0**
Expenditure on special projects[3)]	**0**		12		126		135		116		123	
Total expenditure (consolidated)	**50,001**		**49,751**		**49,183**		**47,093**		**49,959**		**38,376**	
Use of additional income from non-cash contributions	**50,001**		**1,591**		**904**		**927**		**817**		**416**	

and sustainability. The GNTB thus ensured that it remains well-prepared for the challenges in the market for years to come.

Continuing professional development

The GNTB's in-house training and development programme aims to continuously improve the skills of its workforce, boost job satisfaction and enhance the organisation's appeal as an employer.

To support the introduction of AI applications, a central e-learning platform teaching the basics of artificial intelligence was made available to the entire workforce. The platform is also used to share important knowledge about data protection. The plan is to open up this platform for further training activities.

In total, almost half of the GNTB's workforce took part in training activities, with the focus primarily on team events. Webinars remain very popular, though they saw a slight decline in 2025 compared with in-person events.

The GNTB will continue to address the challenges of our times by launching new training initiatives. Being open to new and innovative learning formats is part of this.

Central services

The focus in central services was on maintaining the organisation's facilities. One of the measures implemented as part of EMAS certification, which requires the ongoing improvement of environmental performance, a public environmental statement and the involvement of employees, was the removal of a light liquid separator from the head office courtyard.

IT developments in 2025

The GNTB made extensive changes to its IT infrastructure in 2025. Most important of all, the backend and network systems were upgraded, consolidated and optimised. The central software systems were also completely overhauled and improved to create a modern, high-performance IT landscape.

Performance and efficiency

- Restructuring of the WAN and SD-WAN infrastructure and data links commenced with a view to improving performance and cost efficiency
- Complete change of the central database and the operating system for the ERP system/MACH. The core systems were migrated to a new platform to increase efficiency and stability.
- Overhaul of the storage backend in the data centre at GNTB head office in Frankfurt, with data storage and performance upgraded.

Security

- Replacement of central firewalls: the security architecture was strengthened by installing new firewalls.
- Rollout of zero-trust software: the introduction of this security solution was started in 2025 and is scheduled to be completed and come online in 2026.

Customer relationship management

- Software upgrade of the existing Cobra CRM system: incremental expansion of functionality, primarily for the expansion of interfaces and better integration into existing systems and workflows.
- Adjustments to the Outlook add-in and preparation of further functionality for documenting contacts and processes.
- Optimisation of technical connections to ensure reliable access to systems from the GNTB's international offices.

Internal collaboration

In 2025, the GNTB's first-level support was the main port of call for employees' IT-related queries. The aim was to safeguard the various departments' ability to work by handling queries quickly and in a service-oriented manner. Support played a crucial role in minimising downtime and ensuring day-to-day business continuity.
The increasing centralisation of IT services resulted in greater efficiency in areas such as the administration and provision of email signatures. This reduces complexity for users and makes IT processes more transparent and reliable overall.

The general increase in IT security threats made it necessary to place greater emphasis on system maintenance and rigorous patch management. To ensure the secure and stable operation of the IT infrastructure, system maintenance has been stepped up and the prompt installation of security updates made a priority. This makes it easier to rectify vulnerabilities and reduces the attack surface for potential security risks.

GNTB members, sponsors and partners

Working closely with the German travel industry and private-sector partners and trade associations, the GNTB develops sales strategies and marketing campaigns to promote Germany's positive image abroad as a travel destination and to encourage tourists to visit the country.

Members

Information correct as at March 2026

Companies

A · Amadeus Germany GmbH · Avis Budget Autovermietung GmbH & Co. KG · **B** · BWH Hotels Central Europe GmbH · **D** · DB Fernverkehr AG · Deutschland Museum DM GmbH · 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 · Grand Metropolitan Hotels Holding B.V. · **H** · H World International · Hilton · **J** · JCB International Ltd. Branch · **K** · Käthe Wohlfahrt KG · Kuoni Tumlare – JTB Germany GmbH · **M** · Maritim Hotelgesellschaft mbH · Mastercard Europe SA · Staatliche Porzellan-Manufaktur Meissen GmbH · Messe Berlin GmbH · **O** · Outletcity AG · **P** · Passionsspiele Oberammergau Vertriebs GmbH & Co. KG **S** · Sixt SE · **T** · TUI AG · **V** · Ingolstadt Village & Wertheim Village · VISA European Management Services Ltd., German Branch · VIVA Cruises GmbH

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) · **M** · MV Tourismus GmbH (MV-T) · **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) · 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 Reiseverband 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. · **V** · Visit Northern Germany e. V.* (VNG) · **W** · Willy Scharnow-Stiftung für Touristik

* Strategic partner.

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. (BVGD) · **C** · Cittaslow Deutschland e. V. · **I** · IPK International GmbH · **P** · Pacific Asia Travel Association (PATA) · PROJECT M GmbH · **R** · Romantische Straße Touristik-Arbeitsgemeinschaft GbR · **S** · Staatsbad Norderney GmbH · **T** · Toskanaworld GmbH · 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.

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



Johannes Walter
Vice President Area Management Home Markets, Global Corporate and Leisure Sale Lufthansa Group



Birgit Grauvogel
Spokesperson of the regional tourism organisations, Managing Director of Tourismus Zentrale Saarland GmbH



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



Albin Loidl
President of the German Travel Association (DRV)



Stefanie Berk
Member of the Management Board with responsibility for marketing
Deutsche Bahn Fernverkehr AG
(up to December 2025)



Ann Kathrin Mack
Managing Partner of Europa-Park GmbH & Co. Mack KG

Last revised: May 2026
The members were elected at the 126th general meeting on 30 November 2023.

Other elected members



Dr Tillmann Blaschke
Managing Director of Staatliche Porzellan-Manufaktur Meissen GmbH



Regine Sixt
Senior Executive Vice President of Sixt International Marketing, 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)



Dr Oliver Rengelshausen
Director of Account Management for Travel Sellers in Germany, Austria and Switzerland, General Manager at Amadeus Germany, Amadeus IT Group GmbH

Ministerial representatives



Dr Armgard Maria Wippler
Ministerial Director, Head of Department VII C – SME and Start-up Financing, KfW development bank, Federal Ministry for Economic Affairs and Energy



Markus Siebels
Ministerial Counsellor, Head of Department II A3 – Budget Law and Budget System, Federal Ministry of Finance

Invited members



Dr Marion Weber
Ministerial Counsellor, VIID2 – International Tourism Policy/ Travel Industry, Federal Ministry for Economic Affairs and Energy

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.)



Members of the GNTB Advisory Board

Last revised: May 2026
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
President nextReality.Hamburg e.V.

Professor Conny Mayer-Bonde
Dean of the Business School Baden-Wuerttemberg Cooperative State University
Center for Advanced Studies

Melanie Broyé-Engelkes
Managing Director of the German Wine Institute

Professor Wolfgang 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

Benjamin Suthe
Managing Director of the panorama 361 tourism consultancy

Ex officio members

Ministerial Counsellor Stefanie Matthes
Head of Department G 10 – Policy Matters, Finance Policy and Competition Policy, Federal Ministry of Transport

Counsellor Michael Dorn
Head of Department 404 – Economic Security & Connectivity, Federal Foreign Office

Jessica von Schrenck
Head of Department 312 – Economy, Energy, Construction, Press and Information Office of the Federal Government

Federal state representatives

Baden-Württemberg
Ministerial Counsellor Diana Schafer
Ministry of Economic Affairs, Labour and Tourism

Bavaria
Administrative Director Birgit Graßl
Bavarian Ministry for Food, Agriculture, Forestry and Tourism

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

Brandenburg
Daniela Setton
Ministry for Economic Affairs, Energy, Climate Action and European Affairs

Free Hanseatic City of Bremen
Cornelia Riebl
Senator for the Economy, Ports and Transformation

Free Hanseatic City of Hamburg
Michael Jenke
Office for Economic Affairs and Innovation

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

Mecklenburg-Vorpommern
Gunnar Bauer
Ministry for Economic Affairs, Infrastructure, Tourism and Labour

Lower Saxony
May-Britt Pürschel
Ministry of Economics, Transport, Construction and Digitalisation

North Rhine-Westphalia
Ministerial Counsellor Frank Butenhoff
Ministry for Economic Affairs, Industry and Energy

Rhineland-Palatinate
Ute Meinhard
Ministry of Economy, Transport, Agriculture and Viticulture

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

Saxony
Jörg Markert
Saxony Ministry for Science, Culture and Tourism

Saxony-Anhalt
Elmar Heisterkamp
Ministry for Economic Affairs, Tourism, Agriculture and Forestry

Schleswig-Holstein
Dr Birte Pusback
Ministry for Economic Affairs, Transport, Labour, Technology and Tourism

Thuringia
Ministerial Counsellor Olaf Dirlam
Ministry of Economic Affairs, Agriculture and Rural Affairs

The GNTB International Marketing Committee

Elected members

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

Anna Graf
Consultant
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 Sächsische Schweiz e.V.

Regional marketing organisations

Baden-Württemberg
Christine Schönhuber,
Managing Director of Tourismus Marketing GmbH Baden-Württemberg (TMBW)

Bavaria
Barbara Radomski
Managing Director of Bayern Tourismus Marketing GmbH

Brandenburg
Managing Director of TMB Tourismus-Marketing Brandenburg GmbH

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
Ivan Poltoracki
RVP Europe I Destinations

Avis Budget Autovermietung GmbH & Co. KG
Julieta 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
Oliver Ueck
Head of DB-DSB Collaboration/Promotion North-west and eastern Europe

Deutsche Lufthansa AG
Fabiola Nau
Manager of Leisure Sales

Deutscher Heilbäderverband e.V. (DHV)
Brigitte Goertz-Meissner
President

Deutscher Hotel- und Gaststättenverband e.V. (DEHOGA)
Jana Schimke
CEO of the German Federal Hotel and Restaurant Association

Steigenberger Hotels GmbH H World International
Robert Oudshoorn
Vice President Sales

Last revised: May 2026
The members were elected at the 126th general meeting on 30 November 2023.

Ex officio members

Deutsche Industrie- und Handelskammer e. V. (DIHK)
Julia Seibert
Head of Tourism Economy and Tourism Policy

Deutscher Reiseverband e. V. (DRV)
Albin Loidl
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)
Melanie Broyé-Engelkes
Managing Director

Deutschland Museum DM GmbH
Robert Rückel
Managing Director

Dorint GmbH
Jens Schmitz
Vice President Marketing

ERGO Reiseversicherung AG
Iris Nebbe
Manager, Sales Accommodation | Tourism in Germany | Coach Tourism

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
Karen Schmid
Head of CVC & Marketing Germany

Grand Metropolitan Hotels
Janin Blaser
Chief Commercial Officer

Hilton
Natascha Hendrichs
Senior Manager, Destination Marketing Continental Europe

Historic Highlights of Germany e. V.
Sascha Mayerer
Managing Director

Käthe Wohlfahrt
Takuma Wohlfahrt
Director of Brand Management & Communication, Board of Directors

Kuoni Tumlare JTB Germany GmbH
Monika Rieker
General Manager, Germany & Austria

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
Svante Kienzle
Manager, Public Sector, Germany, Austria and Switzerland

Messe Berlin GmbH
Deborah Rothe
Exhibition Director, ITB Berlin

Passionsspiele Oberammergau Vertriebs GmbH & Co. KG
Ramona Wegenast
Manager

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.
Fritz S. Ahrberg
Chairman

Value Retail Management Germany GmbH
Christina Glavas
Director of Destination Marketing & Partnerships

Visa Europe Management Services Ltd.
Julia Tönnemann
Senior Manager, Acceptance Development Central Europe Region

VIVA Cruises GmbH
Patrick Ell
Vice President Commercial & Marketing

Willy Scharnow-Stiftung für Touristik
Detlef Altmann
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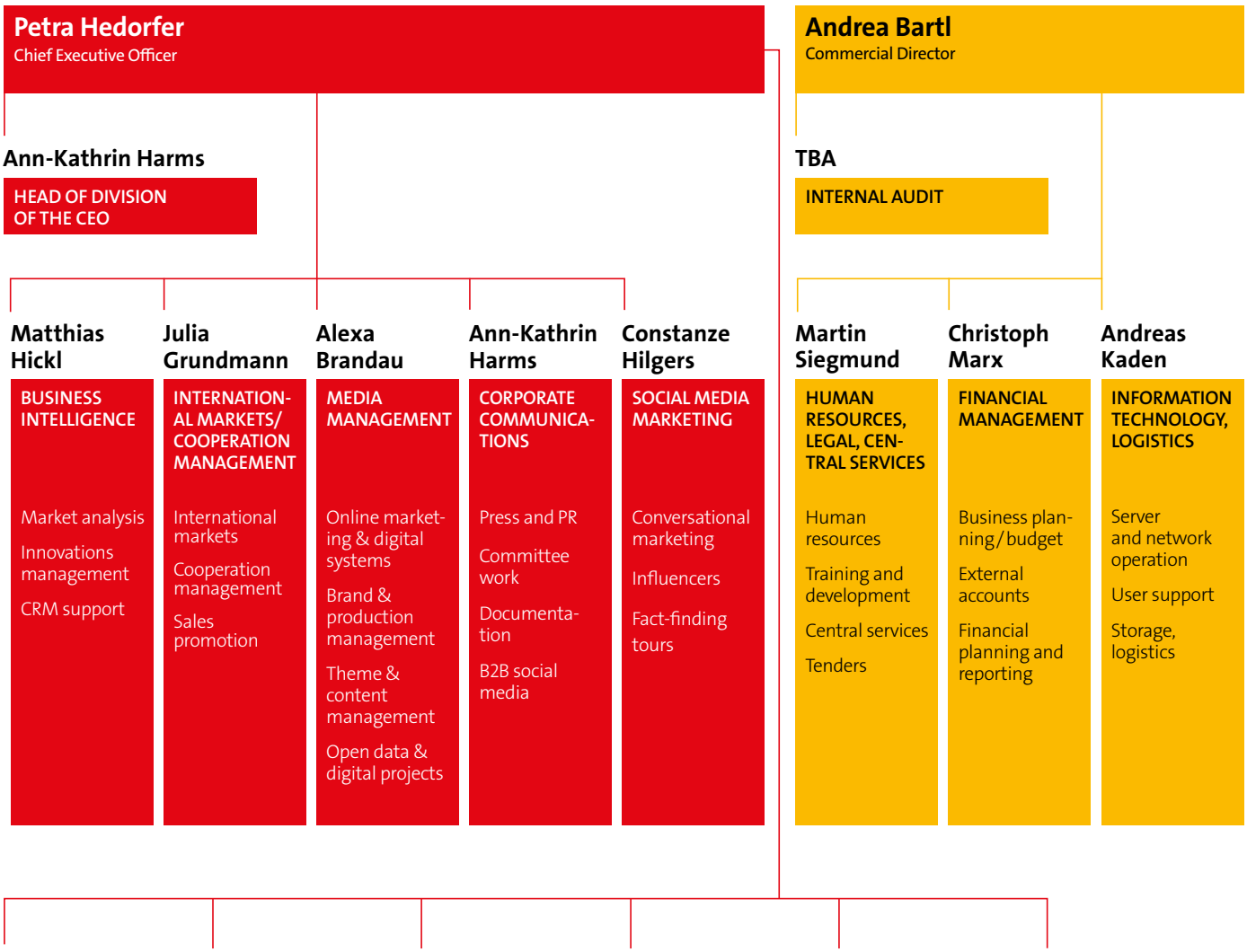

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