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by the German Bundestag

Germany
The travel destination



www.germany.travel

6.7 million promotable
business trips to
Germany by Europeans

30.3

billion spent on
travel to Germany
by Europeans

79.7 million
overnight stays

2015

Facts • Figures • Information

28.8
million holiday
trips by Europeans

121.5

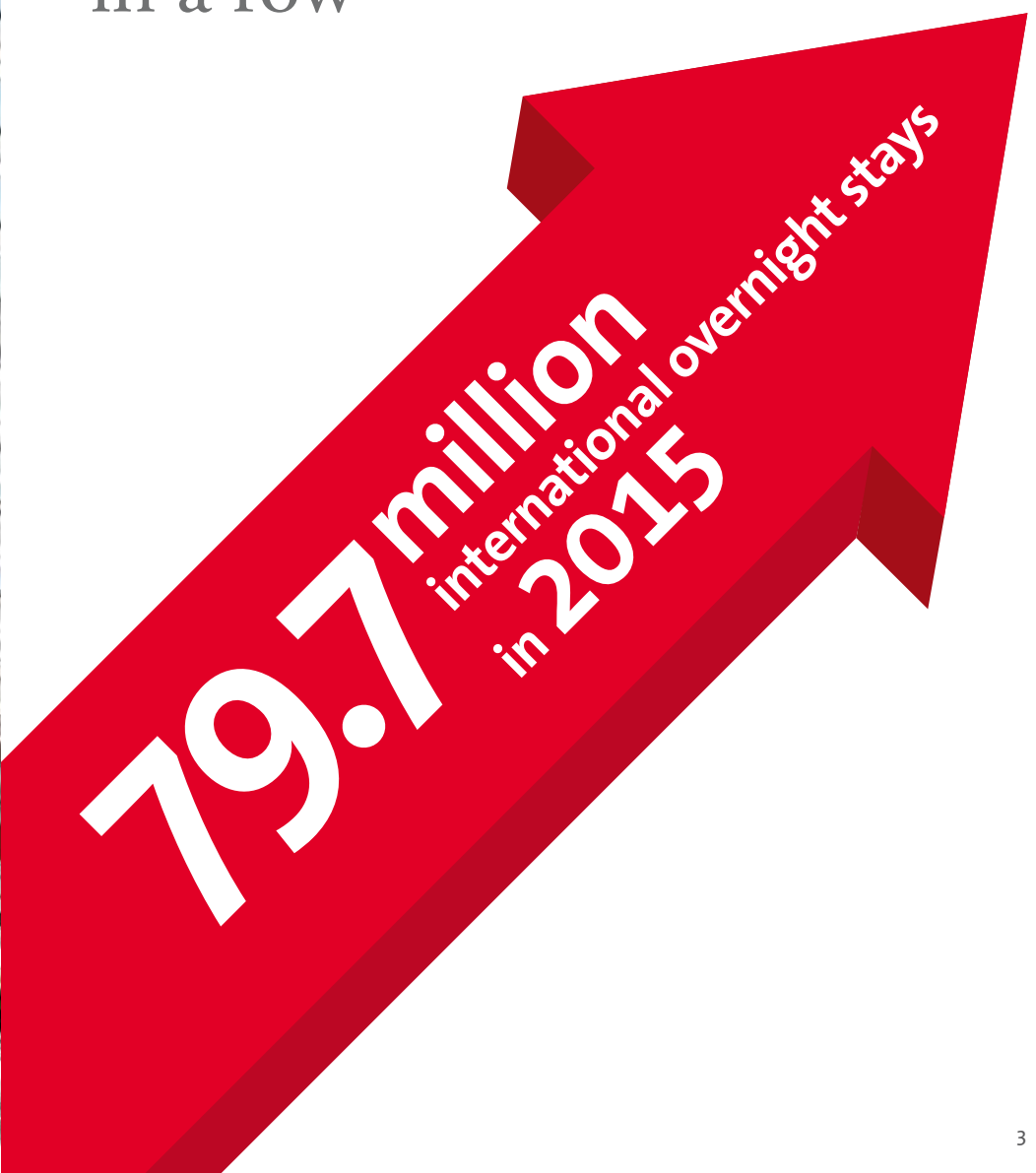
million overnight stays
possible by 2030

44.4 million overnight stays in cities
with over 100,000 inhabitants

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Inbound travel to Germany: **sixth record result** in a row



19.7 million
international overnight stays
in **2015**

Destination Germany in ...

1st place
as a cultural travel destination for Europeans
Source: GNTB/WTM 2015

1st place
worldwide as an international trade fair destination
Source: AUMA 2015 (2015 data)

1st place
in Europe as an international conference destination
Source: ICCA 2016

1st place
as a city break destination for Europeans
Source: GNTB/WTM 2015

1st place
as a travel destination for young Europeans (aged 15 to 24)
Source: GNTB/WTM 2015

1st place
in Europe as a destination for international luxury travel
Source: GNTB/WTM 2015

TOP positions

by global comparison

1st place
2016 Best Country Report
Germany scores highly thanks to its strong economy, worldwide influence and commitment to important global challenges.
Source: News & World Report 2016

2nd place
on the demand side of 50 countries worldwide
Source: Anholt-GfK Roper Nation Brands Index 2015 report

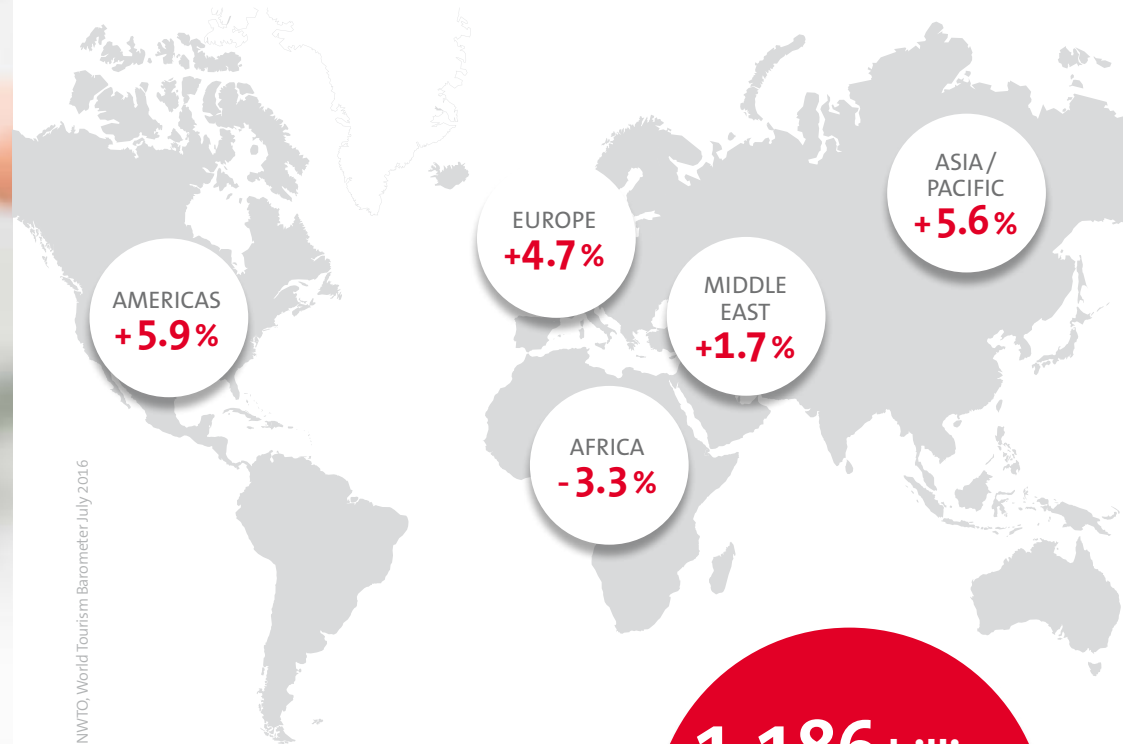
3rd place
on the supply side in a global comparison of 141 countries
Source: 2015 Travel & Tourism Competitiveness Report, World Economic Forum

4th place
as an economic power in a global comparison of 140 countries
Source: Global Competitiveness Report, World Economic Forum 2015



International
tourism has **risen**
to **1.2** billion
arrivals

Global tourism is
continually growing.



Source: UNWTO, World Tourism Barometer July 2016

1.186 billion
international
arrivals worldwide
+4.6%
2014/15

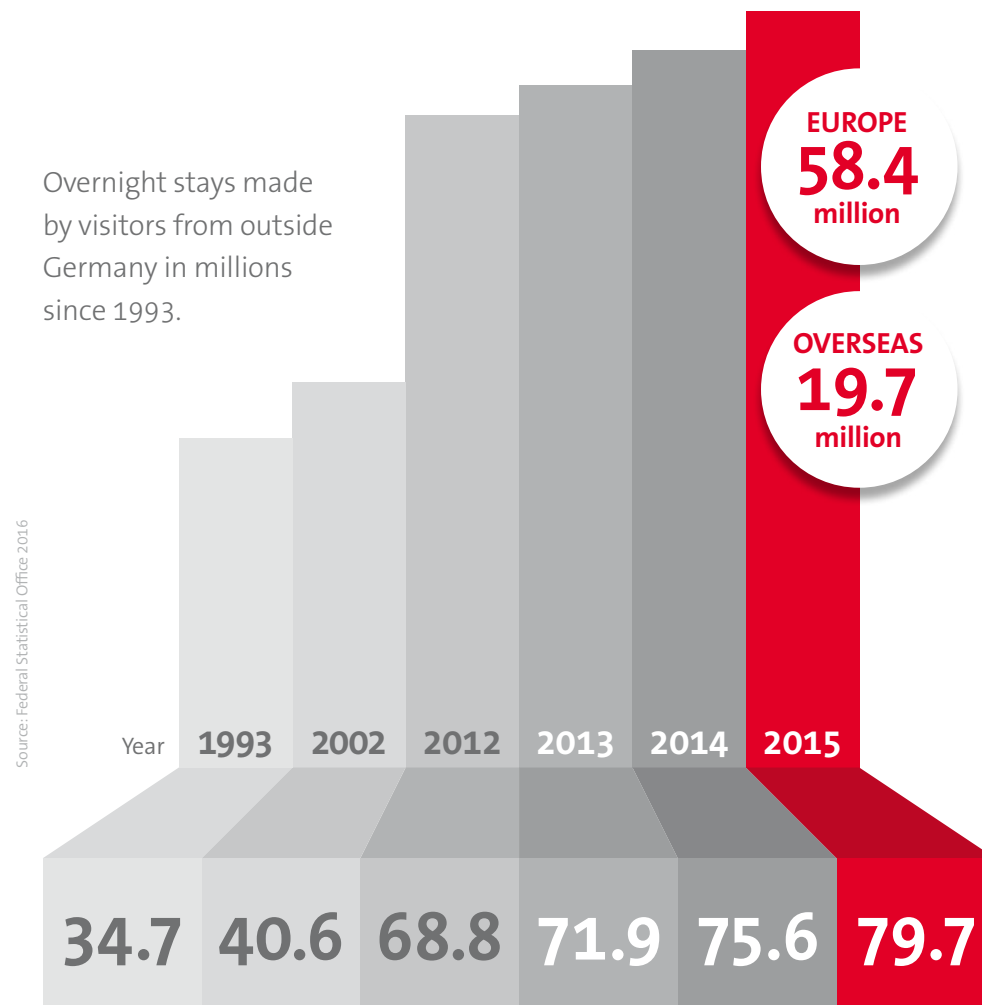
Traditionally strong destination regions showed the **highest rates of growth** in 2015. **Global tourist traffic grew** faster than predicted in 2015. International arrivals will increase by a **further 3.5 to 4.5 per cent** in 2016.

Global demand
is growing:
up by **130%**
since 1993



Since 1993 the number of **overnight stays by foreign visitors to Germany** has risen by **45.0 million**.

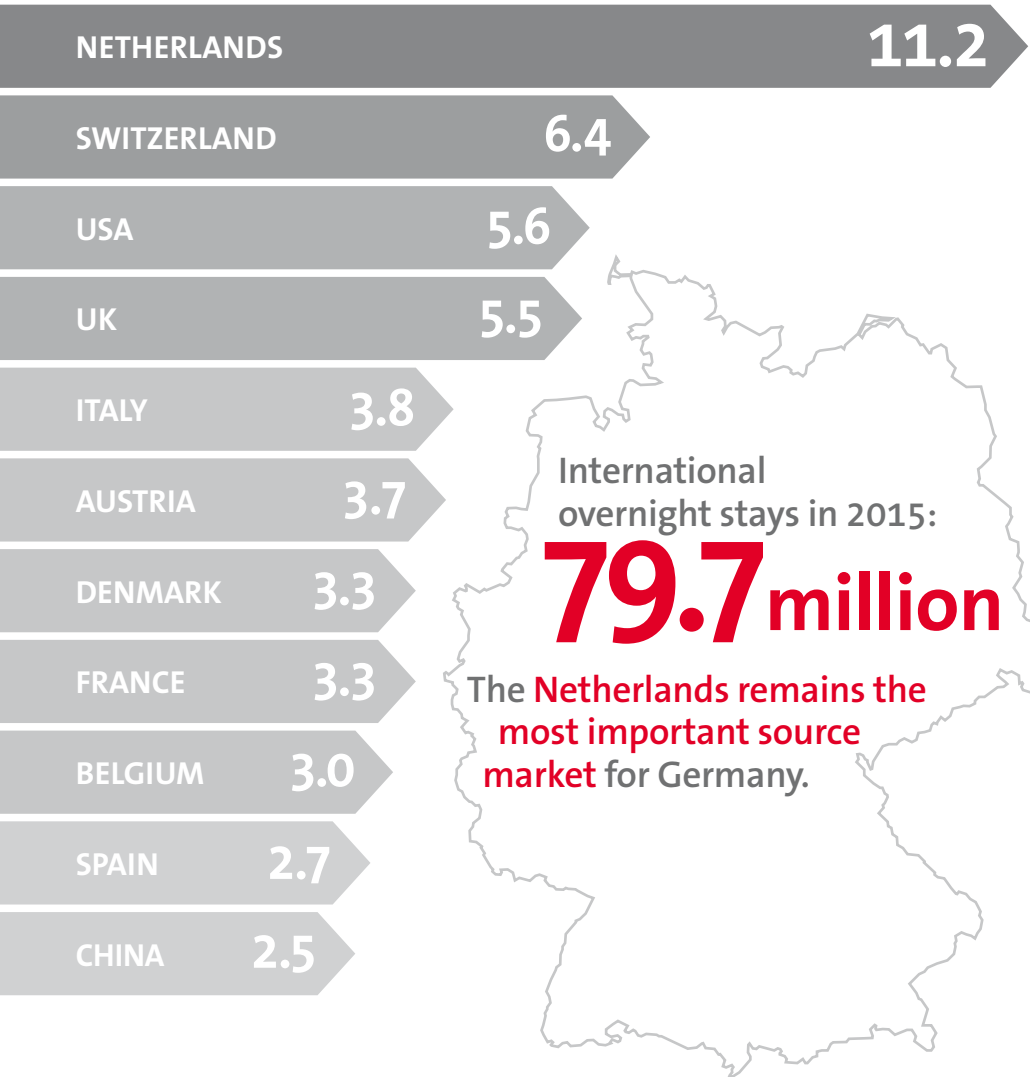
Overnight stays made by visitors from outside Germany in millions since 1993.



Source: Federal Statistical Office 2016

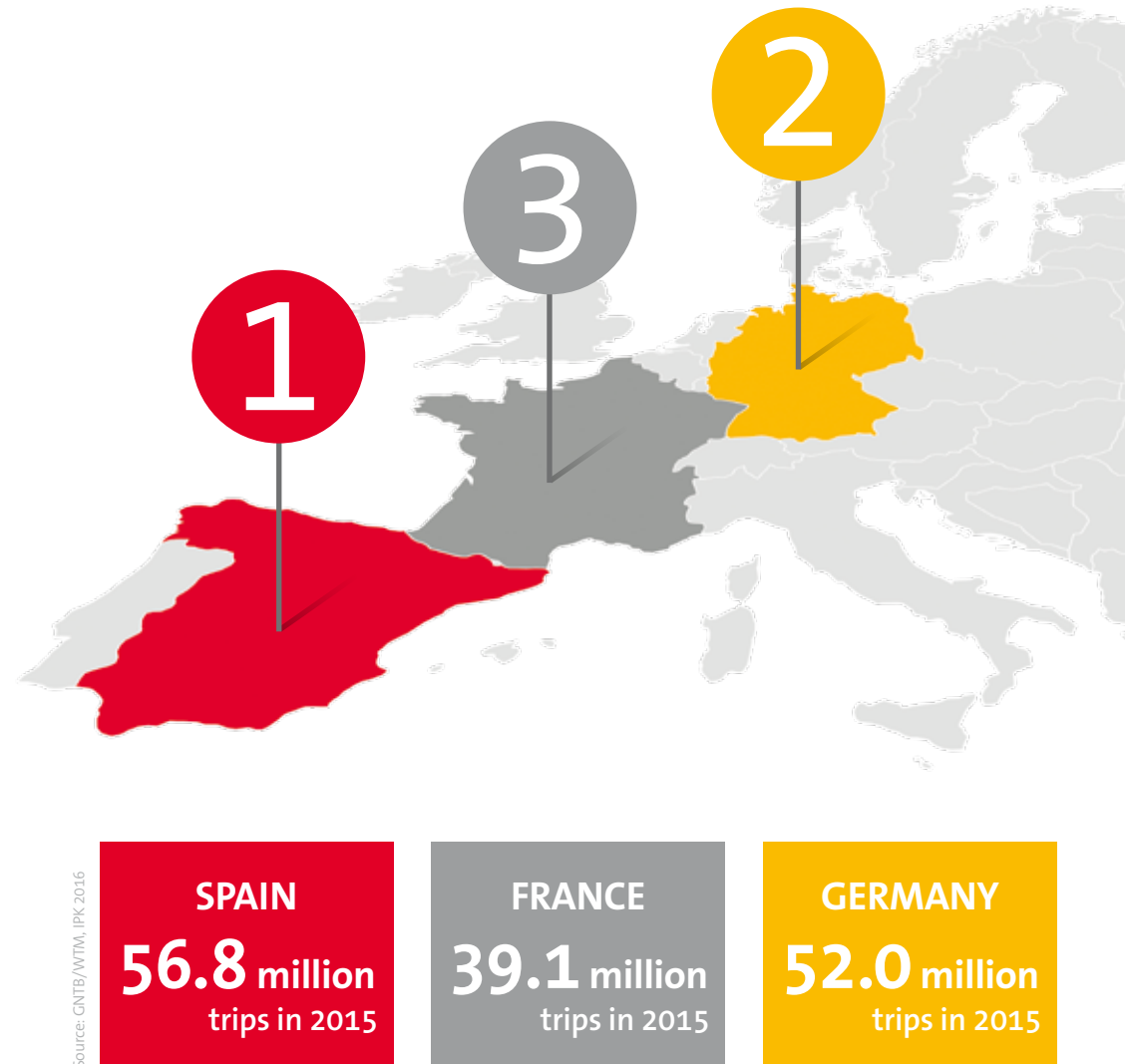
Total figures for each year include overnight stays from unspecified countries (around 1.6 million in 2015)

Most important source markets worldwide for Germany in 2015.



Source: Federal Statistical Office 2016, accommodation statistics incl. camping

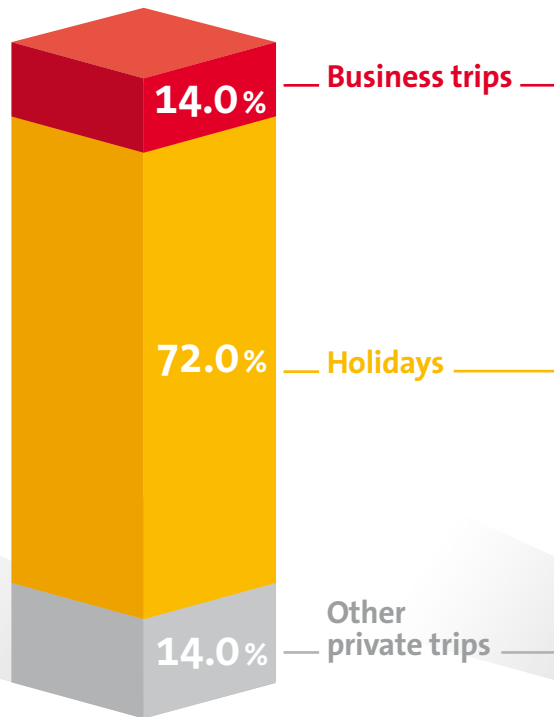
Destination Germany the second most popular destination for Europeans for the sixth year running.



Source: GNTB/WTM, IPK 2016

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

Trips abroad by Europeans:



Trips to Germany by Europeans:

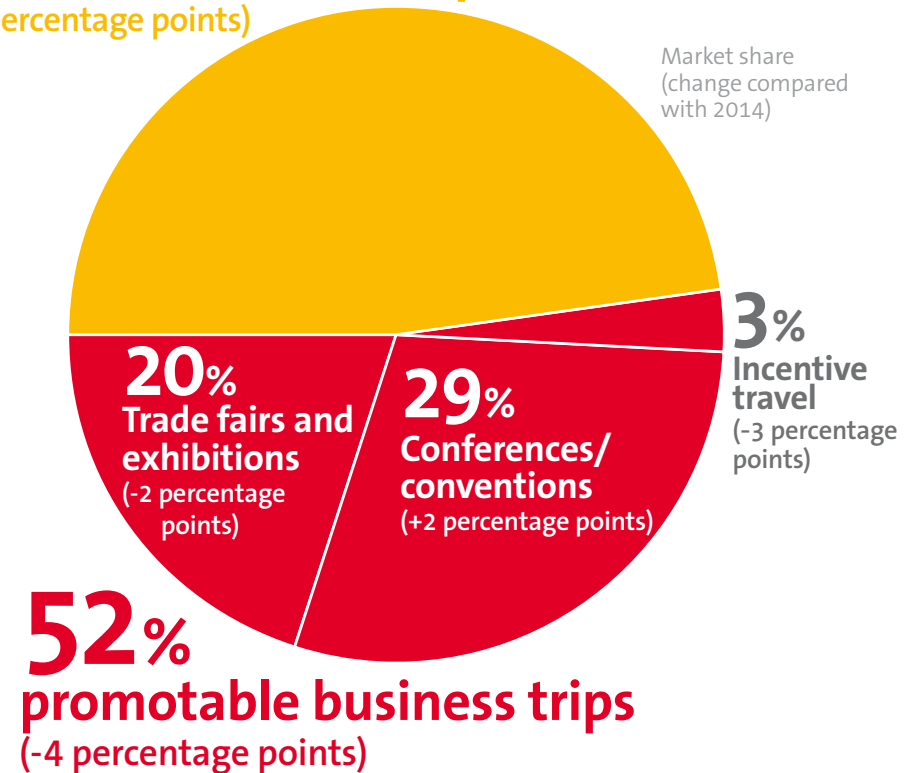


Source: GNTB/WTM 2015

Promotable business trips to Germany by Europeans have the largest market share, with **6.7 million** in 2015.

Total volume in 2015: **12.8 million trips**

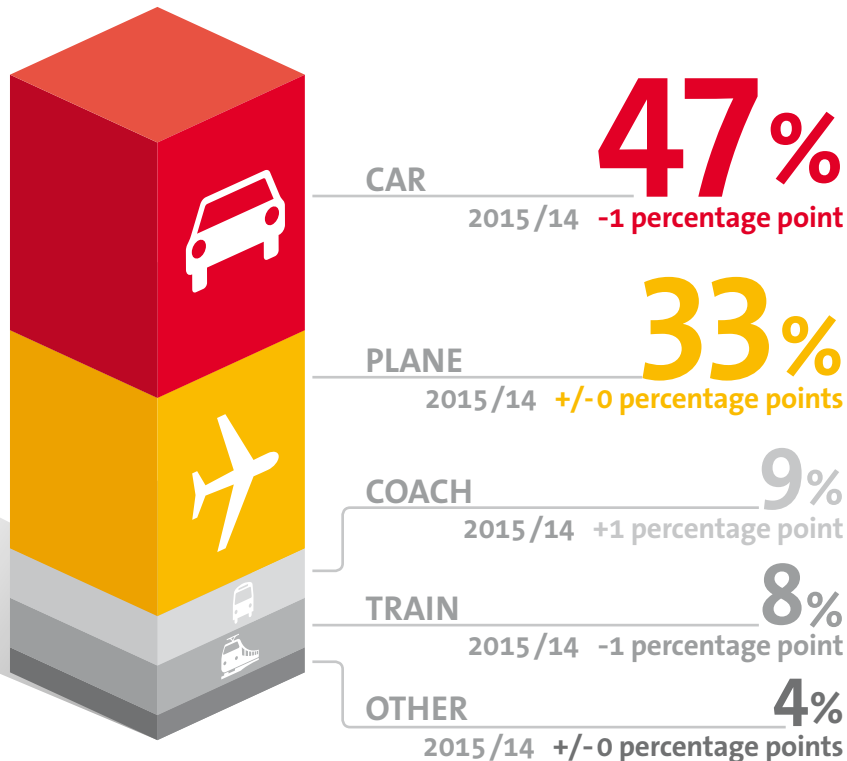
48%
traditional business trips
(+4 percentage points)



Source: GNTB/WTM 2015

Cars and planes are the most important modes of transport for **trips made by Europeans** to Germany.

All trips from Europe to Germany in 2015: **52.0 million**

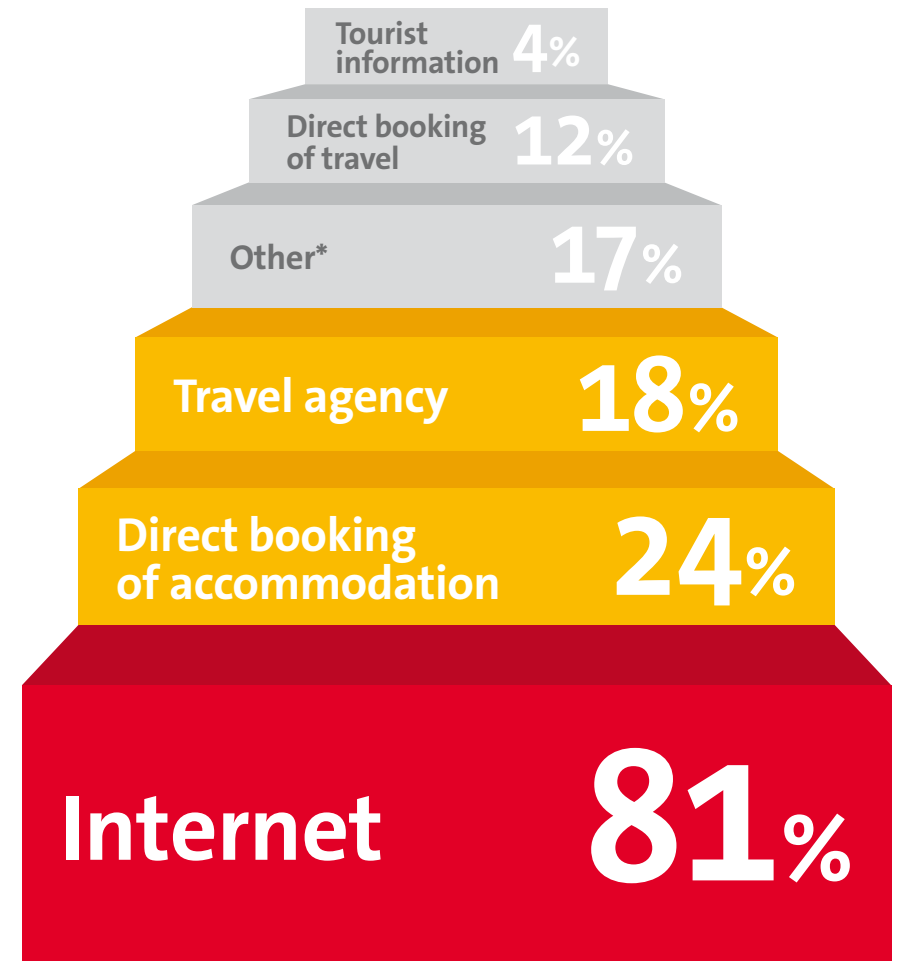


In 2015 **travel expenditure*** on trips to Germany by visitors from Europe came to **€30.3 billion**, an increase of 2.4 per cent on 2014.

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

Booking agent/channels for trips made by Europeans to Germany in 2015.

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



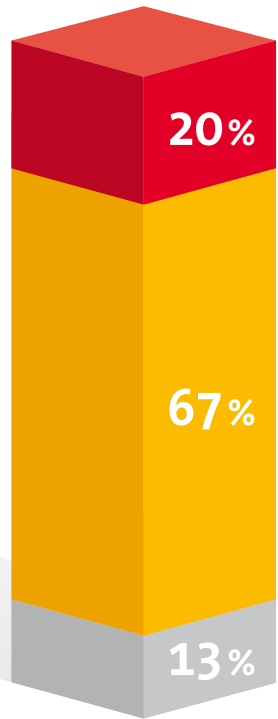
Share of bookings in 2015 (%)

Source: GNTB/WTM 2015; * (by sea, motorbike, bicycle and other transport)

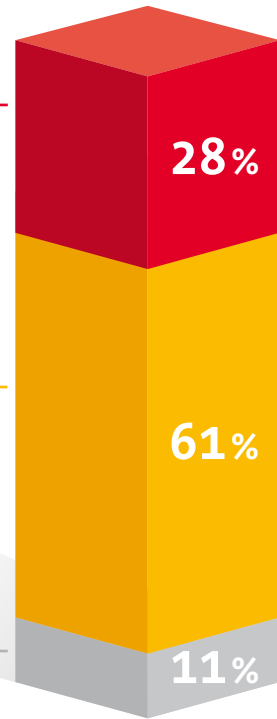
Source: IPK World Travel Monitor 2016; *club, newspaper, church, school, company travel agency and other (multiple answers permitted, only travel booked in advance)

As well as being a popular destination for holidays, Germany has an **above-average share** of the **international business travel market**.

Trips to Europe from overseas*:

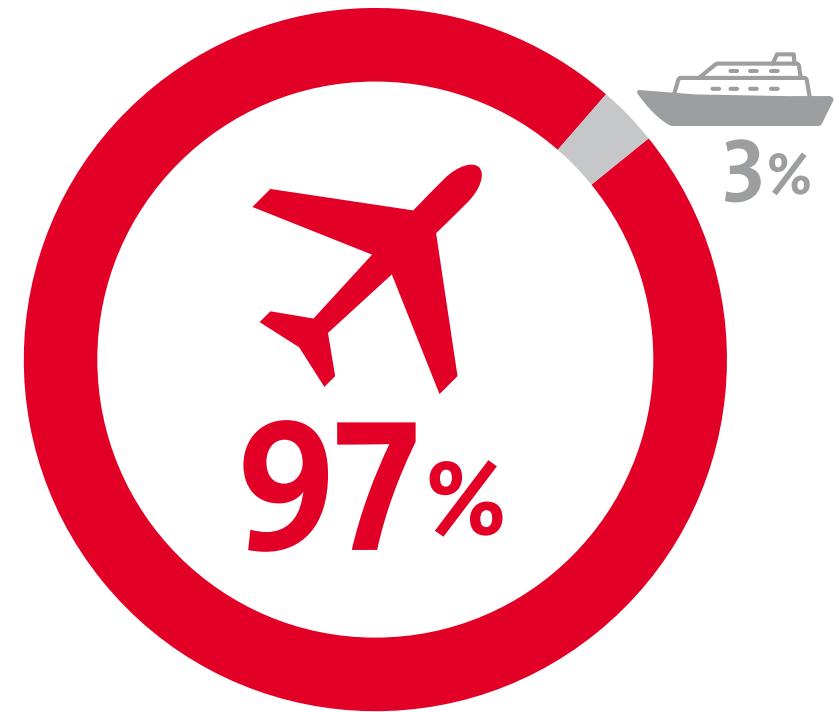


Trips to Germany from overseas*:



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

All trips to Germany from **overseas*** in 2015:
7.2 million (+12.8%)



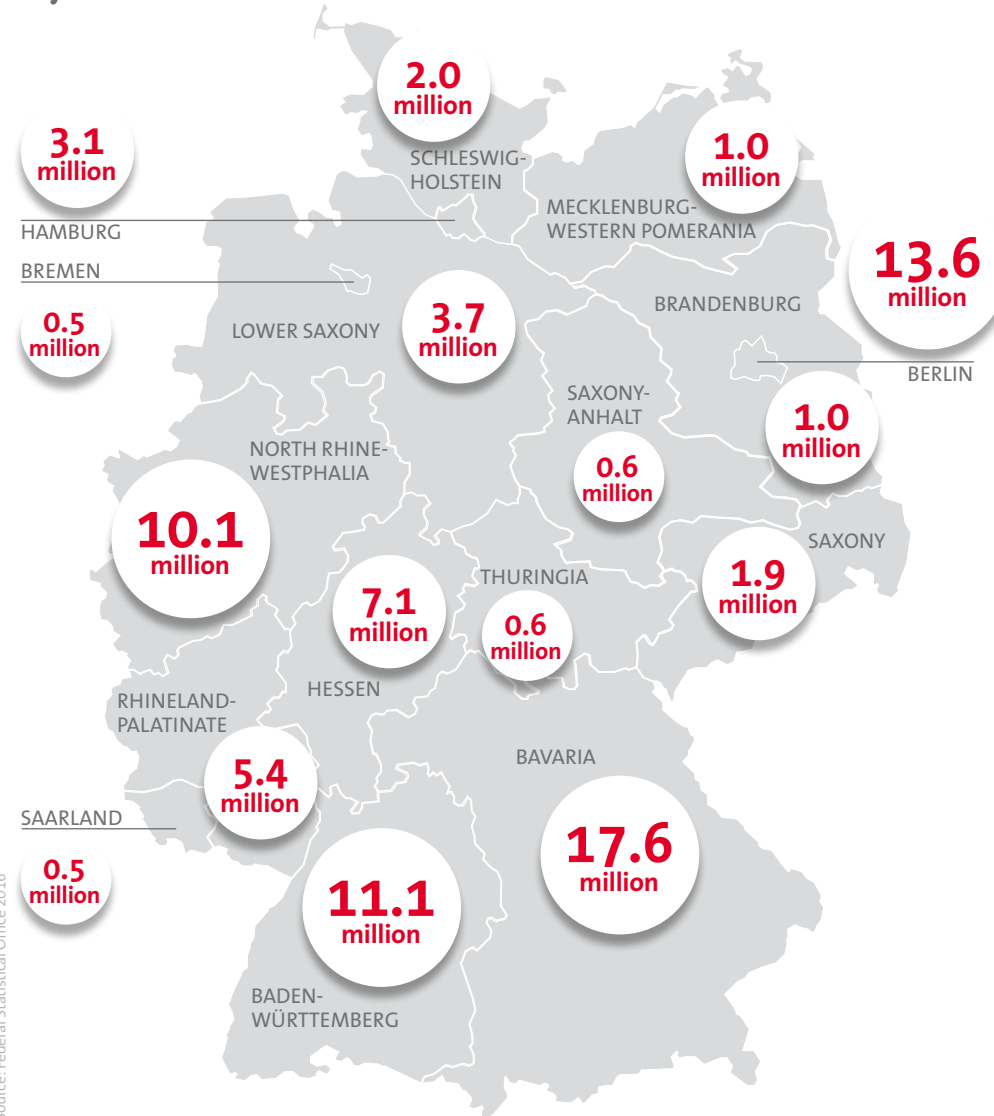
*Basis: 17 markets, source: GNTB/WTM 2015

*Basis: 17 markets, source: GNTB/WTM 2015

In 2014 **travel expenditure** on trips from overseas* to Germany **came to €18.6 billion**, up by 14 per cent on the previous year.

An increase
of **5.4%**
in 2015

Breakdown of overnight stays by foreign visitors to Germany in 2015 by federal state.



Source: Federal Statistical Office 2016

Germany's **major cities are particularly popular.**



Distribution of international overnight stays in German towns and cities by size in 2015.

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

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

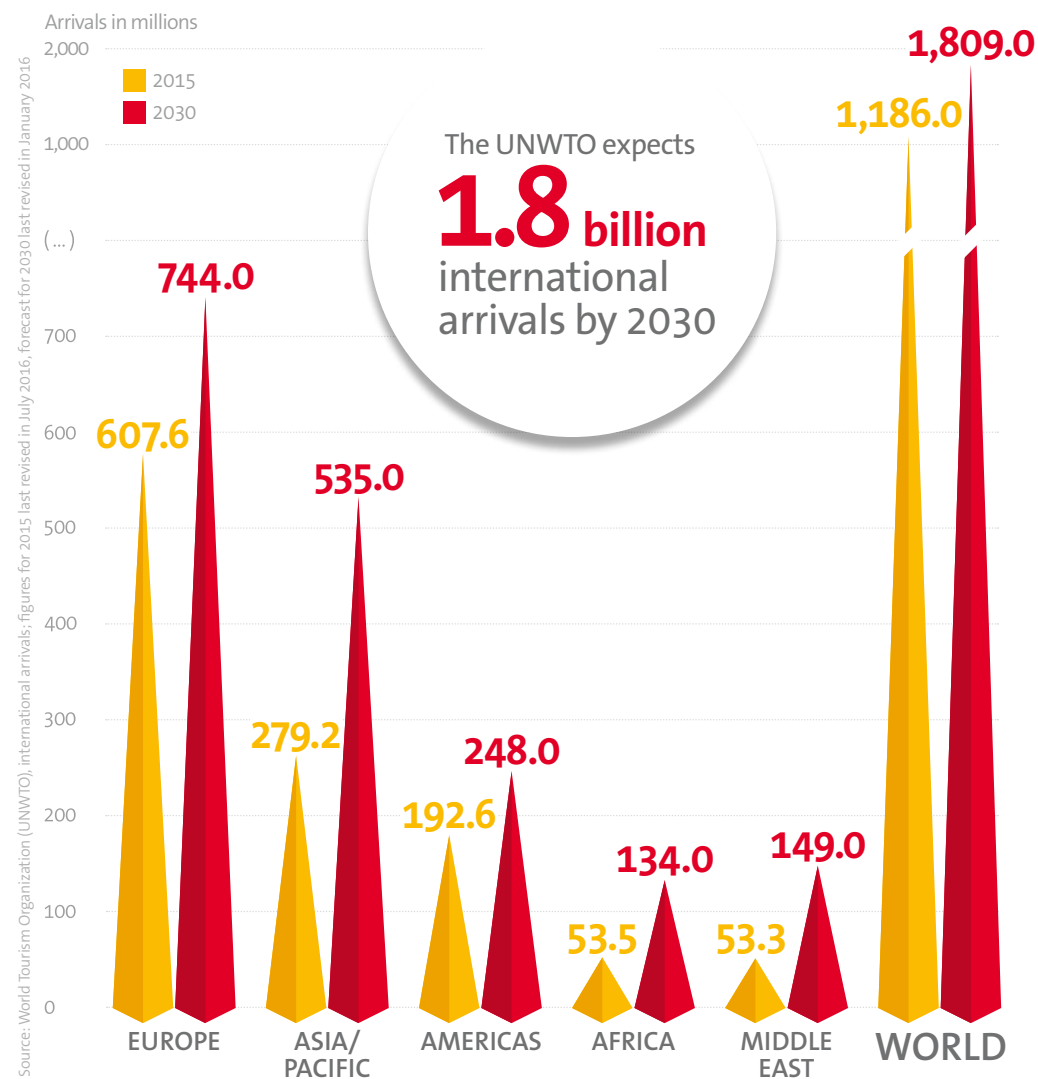
37 % of foreign holidaymakers in Germany consider **landscape and scenery** an **important reason for travel****.

42 % growth (2005–2015) in **overnight stays by foreign visitors in smaller towns and villages***** (up to 10,000 inhabitants)

International overnight stays could **increase** by **80%** by 2030



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

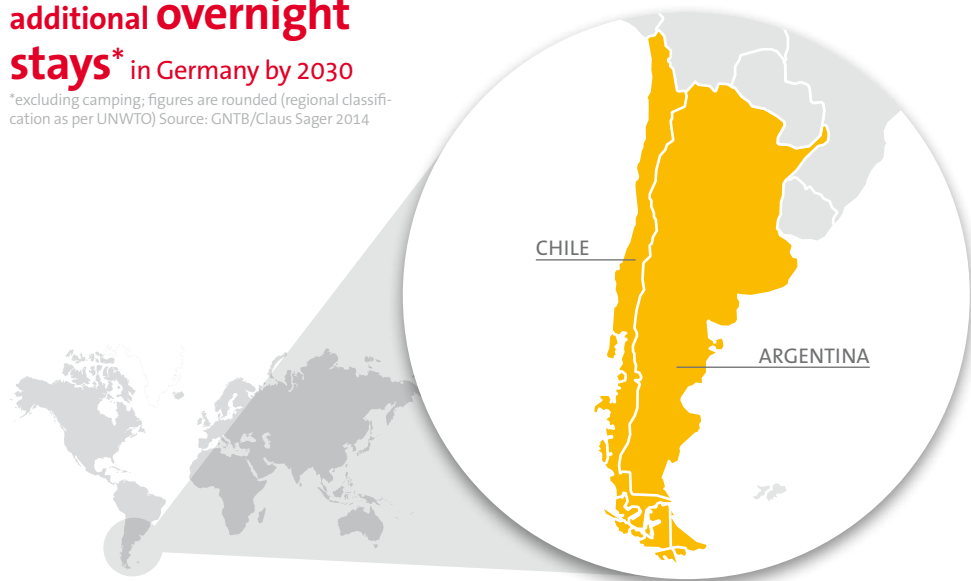


South American countries with high potential.

One million trips to Europe from Argentina and Chile alone.

Almost **two million additional overnight stays*** in Germany by 2030

*excluding camping; figures are rounded (regional classification as per UNWTO) Source: GNTB/Claus Sager 2014

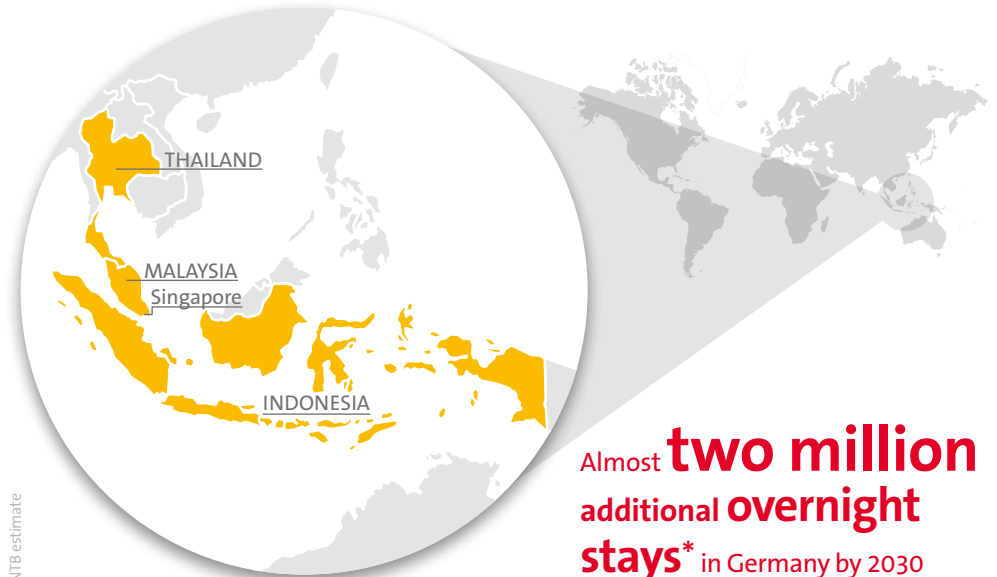


Markets	Trips abroad (2014)	Trips to Europe (2014)	Trips to Germany (2014)
1st place	Argentina, 7,300,000	Argentina, 774,000	Argentina, 68,000
2nd place	Chile, 2,100,000	Chile, 254,000	Chile, 56,000
Total	9,400,000	1,028,000	124,000

Source: GNTB/WTM, IPK 2015

South East Asia shows great potential.

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



Almost **two million additional overnight stays*** in Germany by 2030

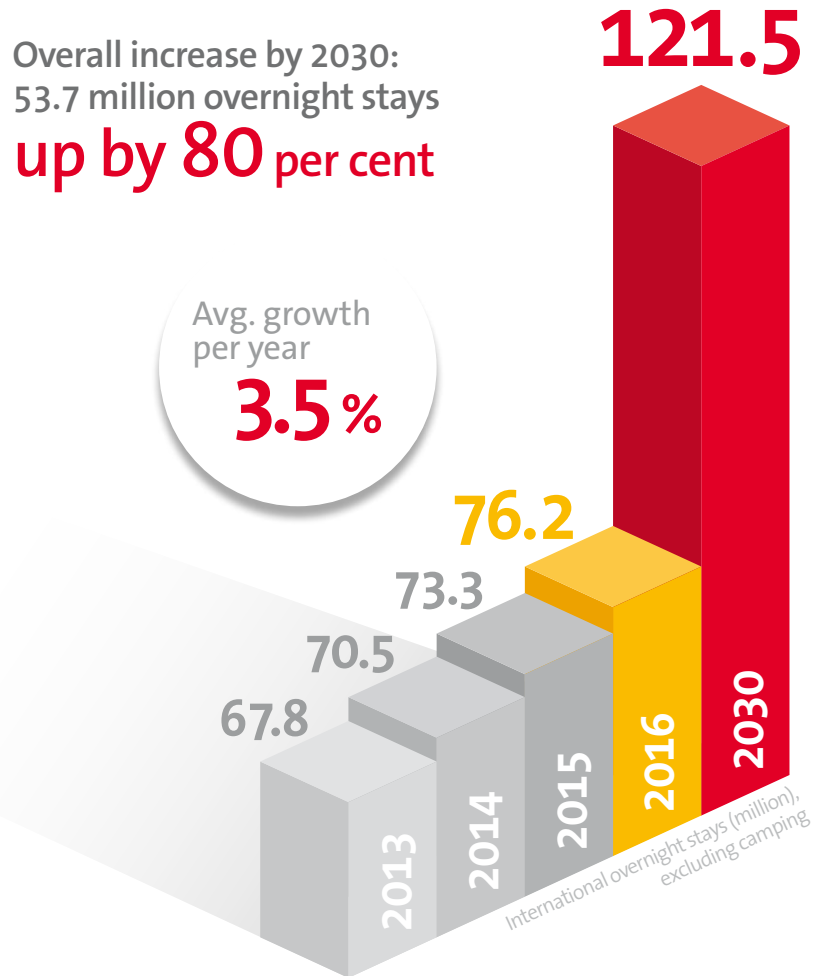
*excluding camping; figures are rounded (regional classification as per UNWTO) Source: GNTB/Claus Sager 2014

Source: GNTB/WTM, IPK 2015; *2013 Indonesia Outbound Market Profile, GNTB estimate

Markets	Trips abroad (2014)	Trips to Europe (2014)	Trips to Germany (2014)
1st place	Indonesia*, 7,800,000	Malaysia, 518,000	Thailand, 62,000
2nd place	Singapore, 6,700,000	Thailand, 418,000	Singapore, 56,000
3rd place	Malaysia, 5,900,000	Singapore, 405,000	Malaysia, 54,000
4th place	Thailand, 3,900,000	Indonesia*, 93,000	Indonesia*, 50,000
Total	24,300,000	1,434,000	222,000

By 2030 Germany's inbound tourism industry could potentially reach **121.5 million overnight stays.**

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



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



Source: GNTB/Claus Sager 2014

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German National Tourist Board (GNTB)
Beethovenstrasse 69
60325 Frankfurt am Main
Tel: +49 (0)69 974 640
Fax: +49 (0)69 751 903
info@germany.travel



www.germany.travel