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Federal Ministry
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by the German Bundestag

Germany
The travel destination



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2022 FACTS AND FIGURES



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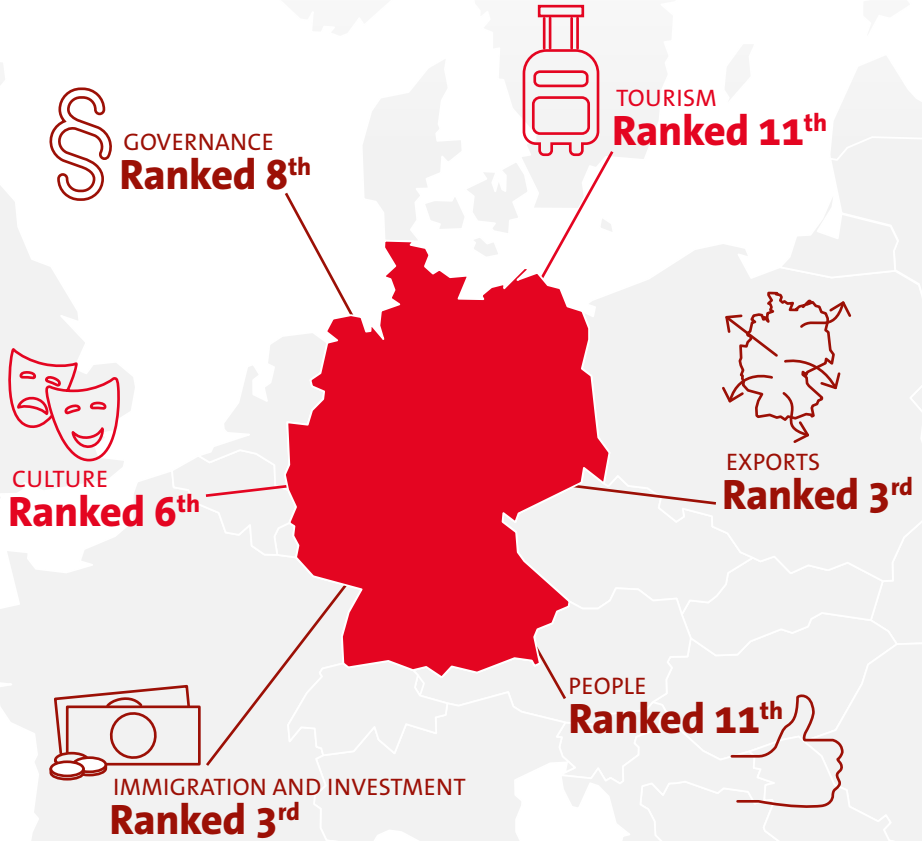
**Inbound tourism
to Germany**

68.1

**million overnight stays
by foreign visitors in 2022**

Source: Federal Statistical Office 2023

Germany retains **no. 1** ranking in the **Nation Brands Index**



The NBI examines a country's reputation in six categories: Exports, Governance, Culture, People, Tourism, and Immigration and Investment

Source: Anholt-IPSOS Nation Brands IndexSM 2022 Report, October 2022, online survey with 60,081 interviews in 20 countries worldwide, 60 nations examined.

Key drivers for Germany's global tourism image



Historic Buildings



Contemporary Culture



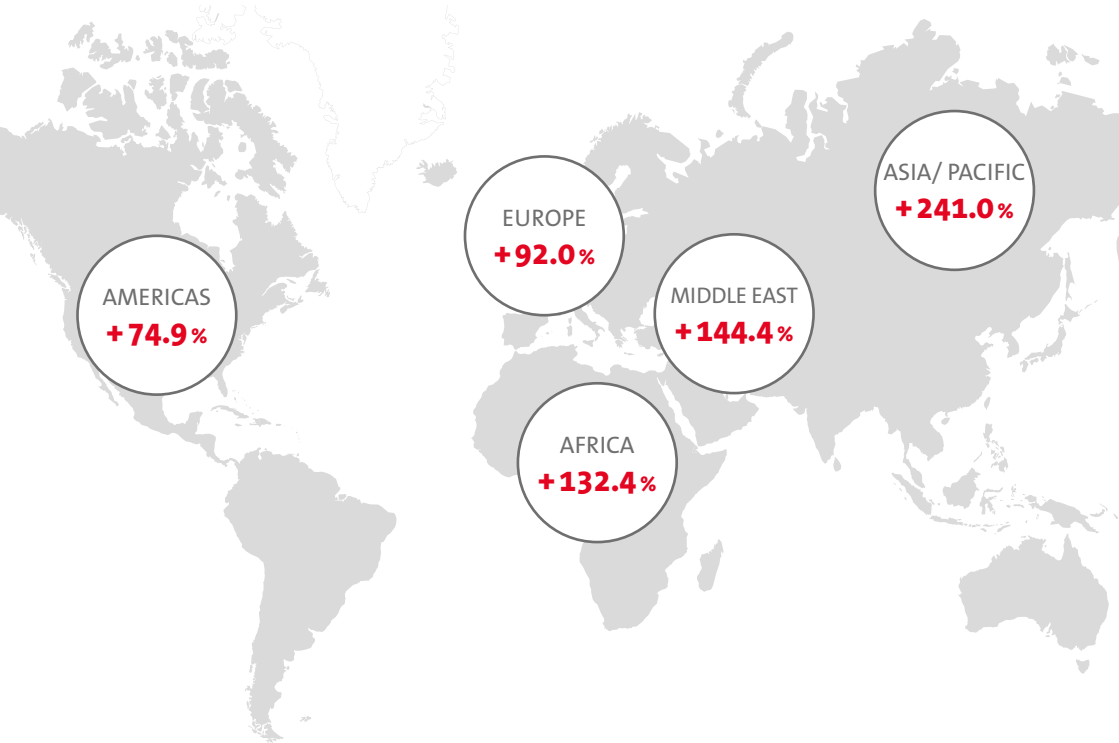
Vibrant City Life

**International
tourism
increases to **917** million arrivals
in 2022**

Source: World Tourism Organization (UNWTO), January 2023



Back to worldwide growth in 2022



+101.6%
Change 2022/21

Recovery of international
arrivals worldwide at

62.6%

compared to 2019*

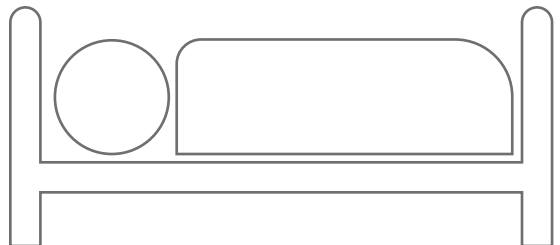
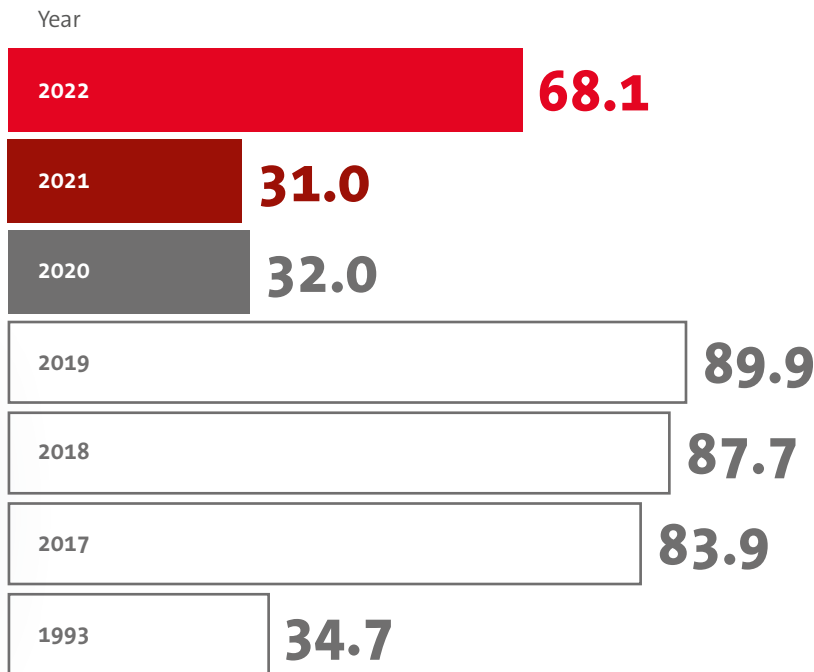
Recovery of arrivals in
Germany already at

72%

compared to 2019**

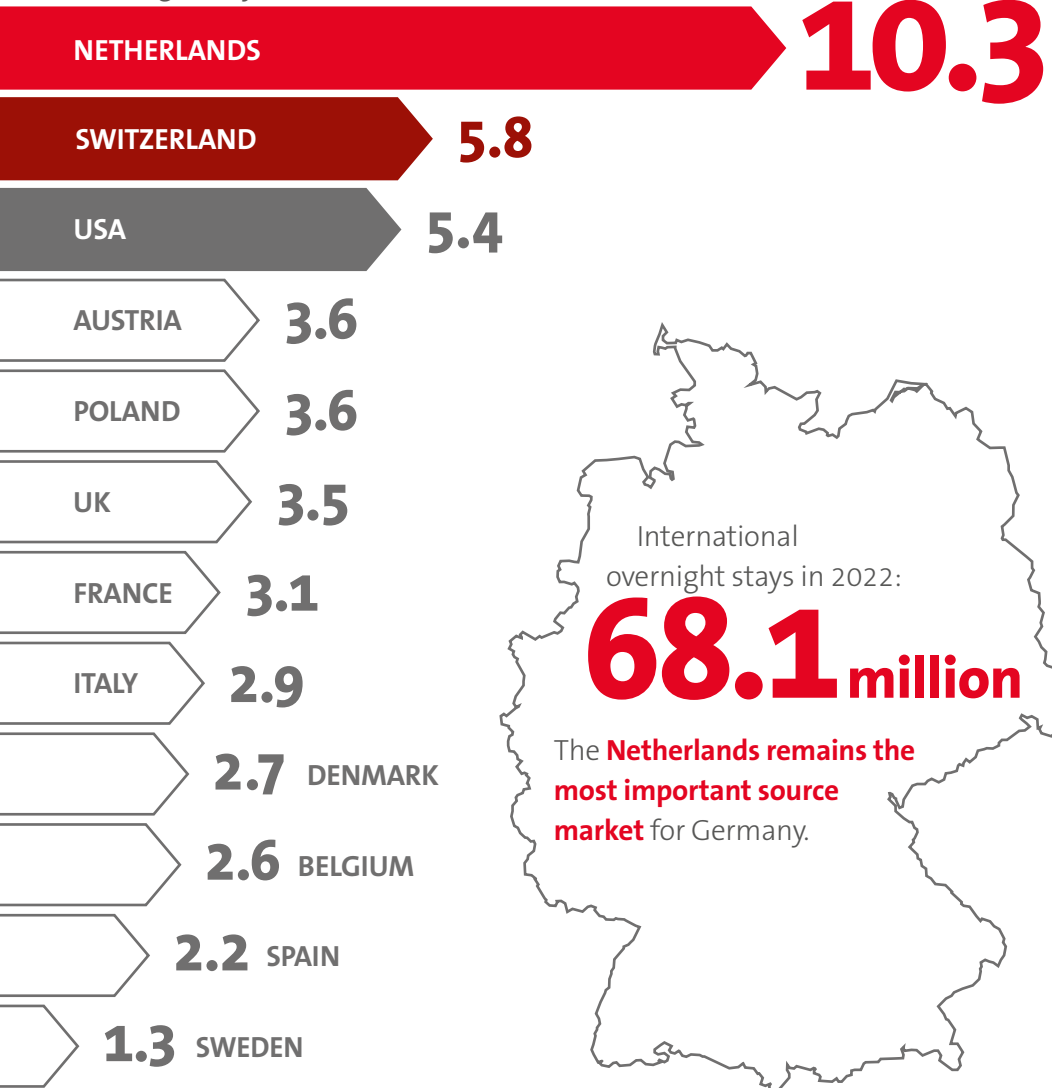
Until 2019, the number of **overnight stays** from **international visitors** to Germany had **risen by 55.2 million**

Overnight stays in Germany made by international visitors in millions since 1993



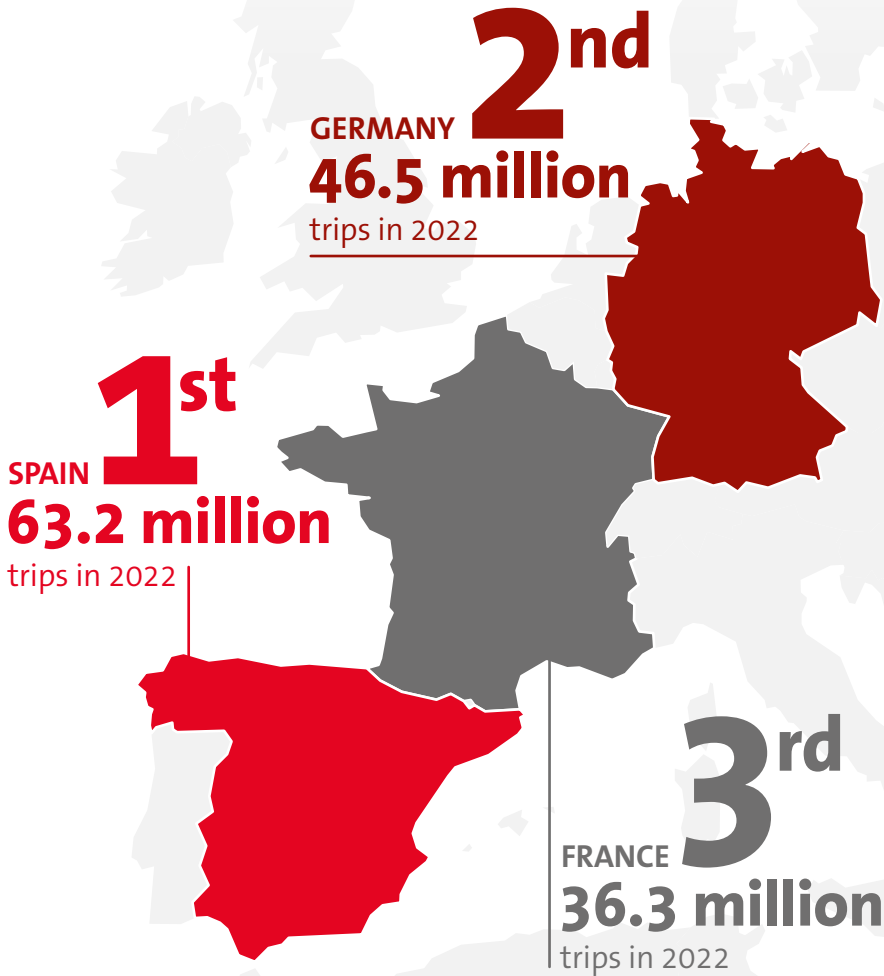
Most important source markets worldwide for Germany in 2022

Overnight stays in millions

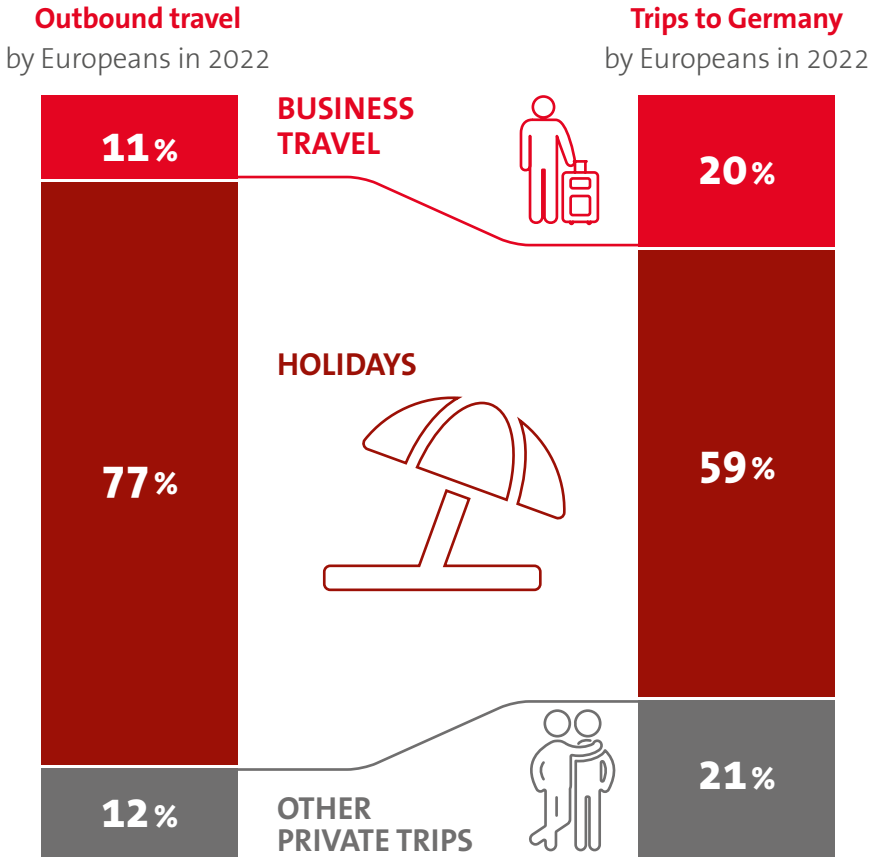


Source: Federal Statistical Office 2023

2022: Destination Germany the **second most popular destination for Europeans**



Germany has an **above-average share** of the European business travel market

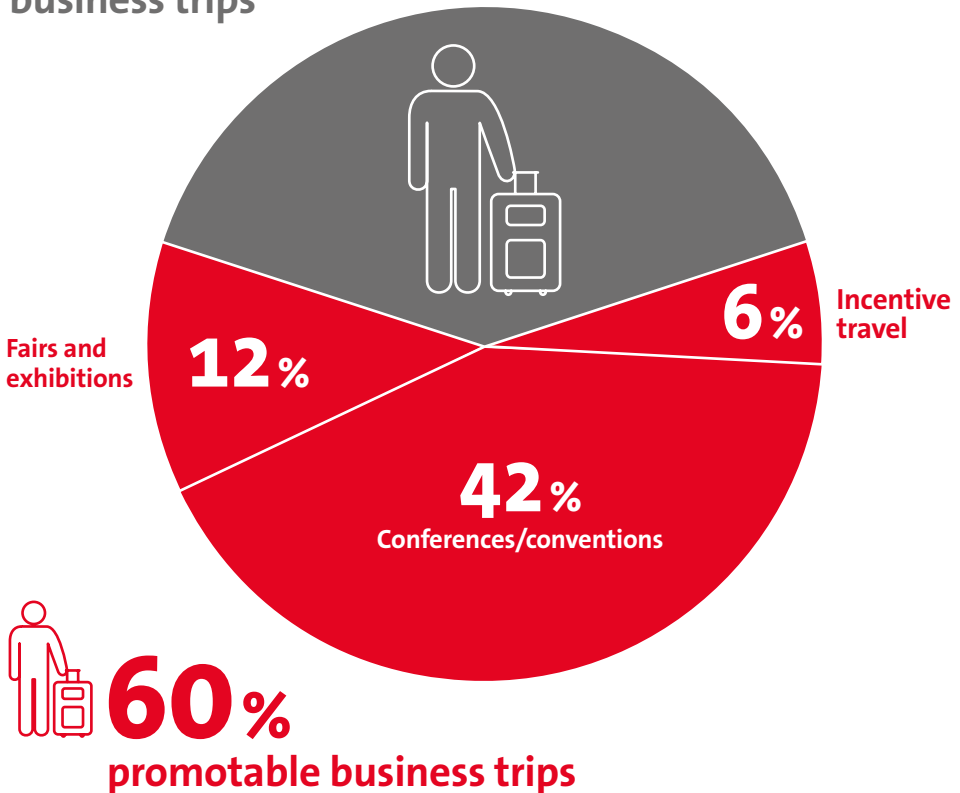


Source: GNTB/WTM 2022, IPK 2023

Promotable business trips to Germany by Europeans have the largest market share, with **5.5 million** in 2022

Total volume of business trips from Europe in 2022: **9.2 million trips**

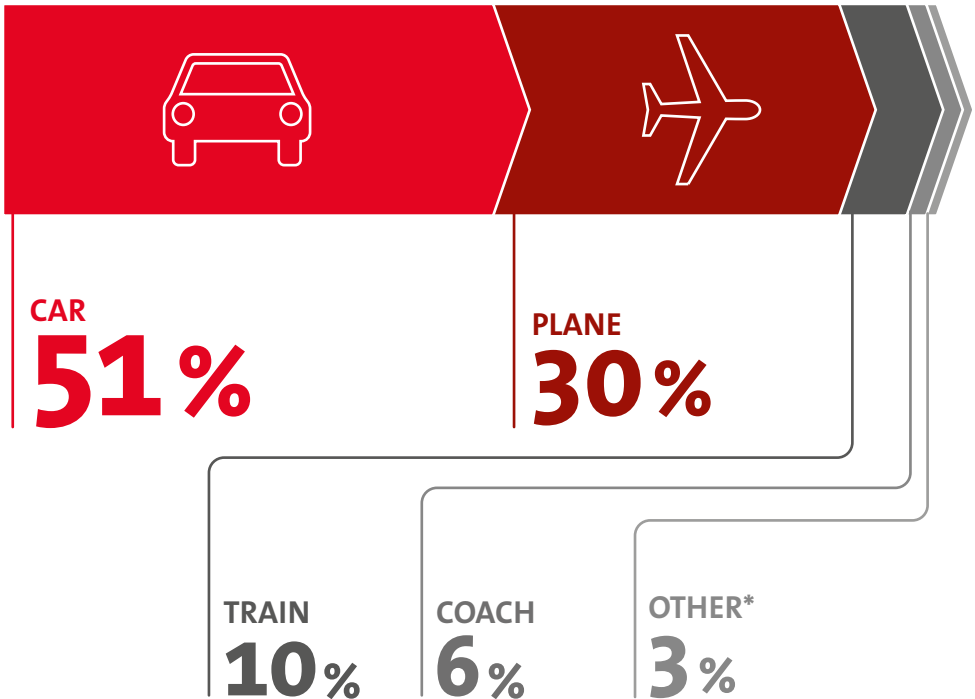
40% traditional business trips



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

All trips from Europe to Germany in 2022: **46.5 million**

Market share



In 2022 travel expenditure** on trips to Germany by visitors from Europe came to €32.1 billion

*By sea, motorbike, bicycle and other transport; **all travel expenditure for transportation, accommodation, food, shopping, etc. while staying in Germany, as well as travel to, from and within Germany; sources: GNTB/WTM 2022, IPK 2023

Booking agent/channels for trips made by Europeans to Germany in 2022

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

DIRECT BOOKING OF ACCOMMODATION

28%

TRAVEL AGENT

18%

DIRECT BOOKING OF TRANSPORT

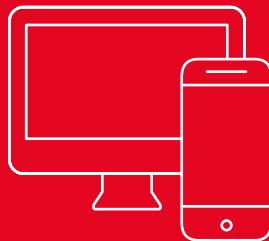
14%

OTHER*

11%

INTERNET

90%

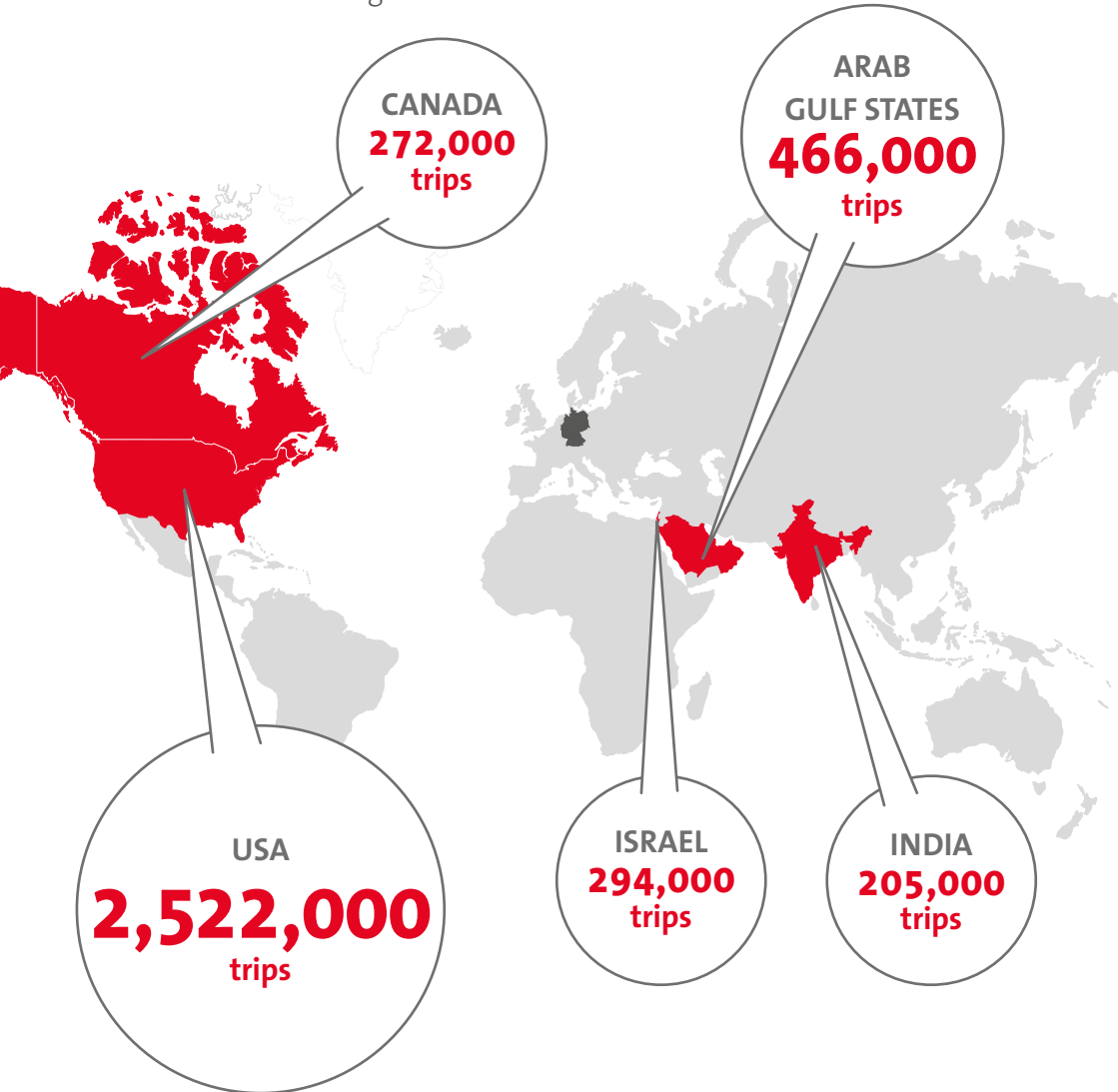


Share of bookings in 2022 (%)

*Club, newspaper, church, school, company travel agency and other (multiple answers permitted), only travel booked in advance; sources: GNTB/WTM 2022, IPK 2023

Incoming from Overseas markets to Germany 2022

Source markets with large volumes



Sources: GNTB/WTM 2022, IPK 2023, preliminary figures

Booking agent/channels for trips made from Overseas to Germany in 2022

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

**TRAVEL
AGENT**

41%

**DIRECT BOOKING OF
ACCOMMODATION**

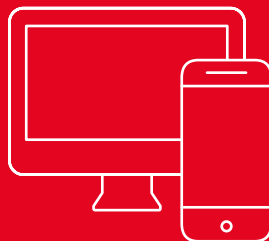
25%

**DIRECT BOOKING OF
TRANSPORT**

22%

INTERNET

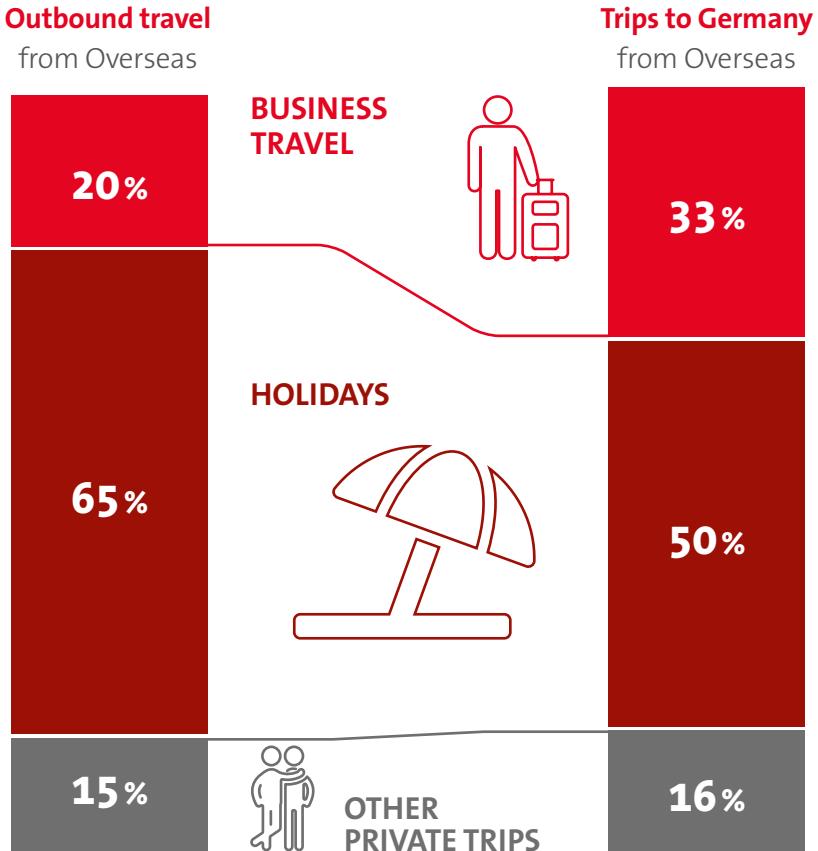
87%



Share
of bookings
in 2022 (%)

Sources: GNTB/WTM 2022, IPK 2023, preliminary figures,
only travel booked in advance (multiple answers permitted)

One-third of the trips from Overseas to Germany are **business trips**

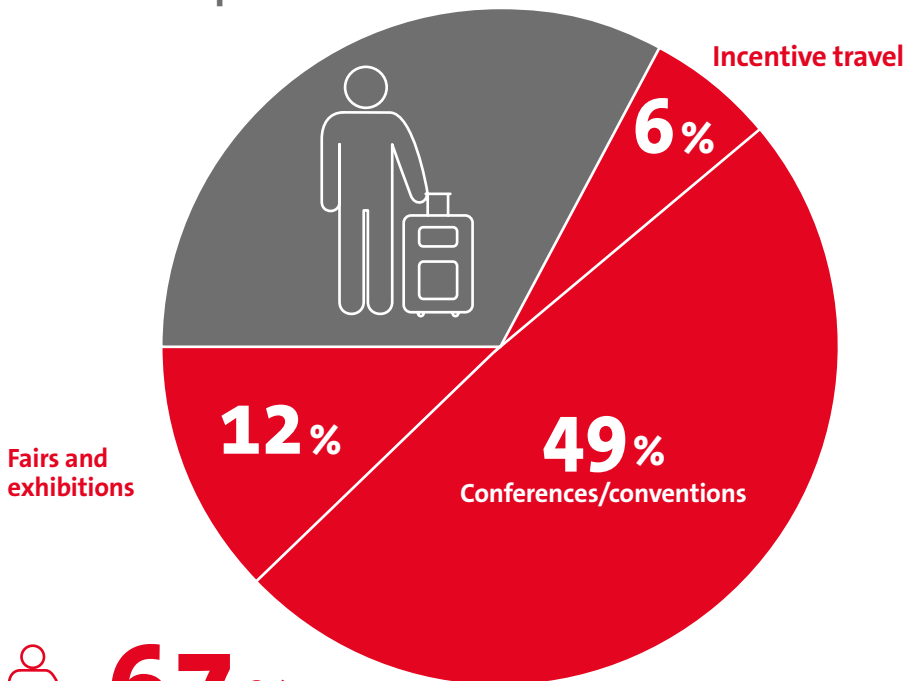


Sources: GNTB/WTM 2022, IPK 2023, preliminary figures, Deviations from 100% are due to rounding

Promotable business trips to Germany from Overseas have the largest market share in 2022

Total volume of business trips from Overseas in 2022: **1.8 million trips**

33% traditional business trips



 **67%**
promotable business trips

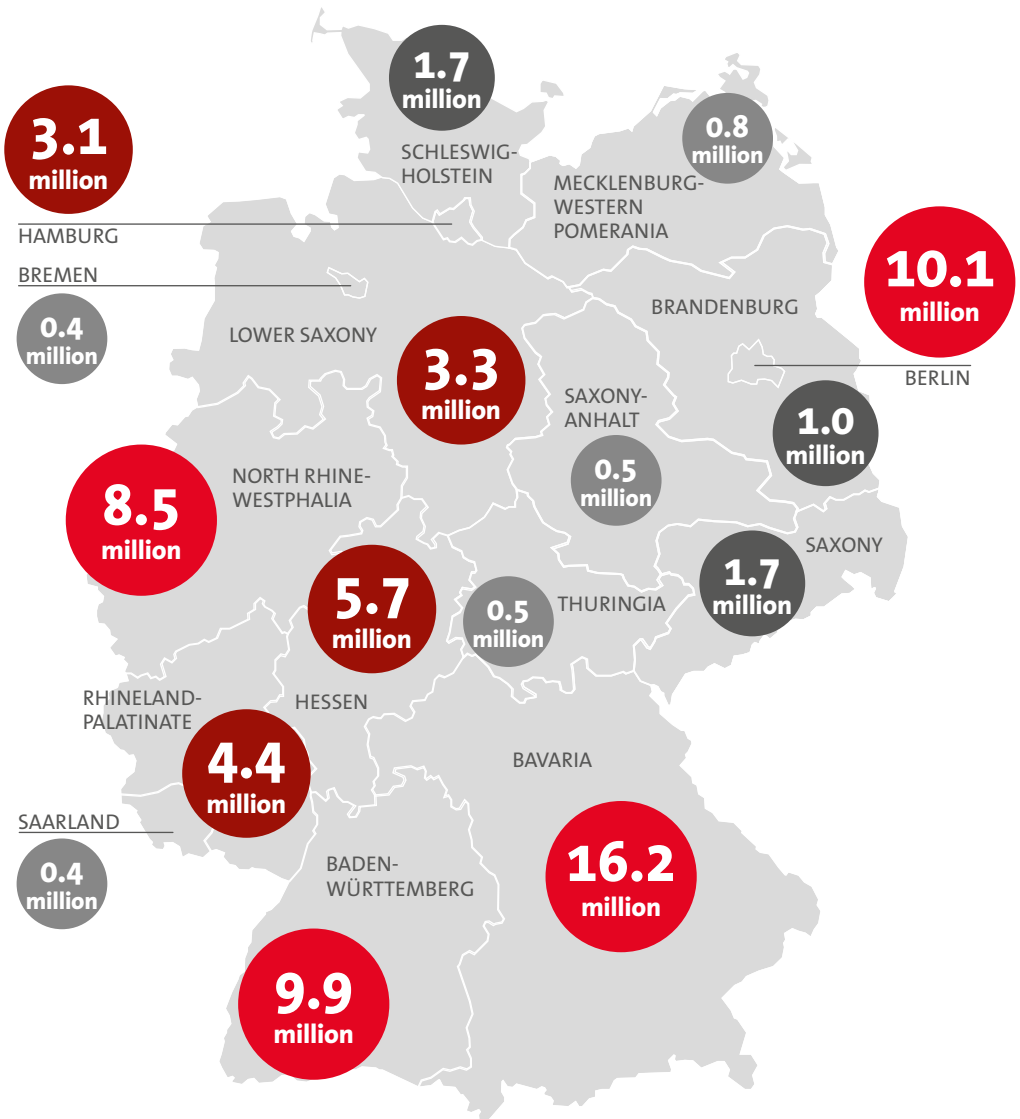
International overnight stays
in 2022

+119.6%

compared to 2021

Source: Federal Statistical Office 2023

International overnight stays by federal state



Source: Federal Statistical Office 2023

Germany's **major cities remain popular**



Distribution of international
overnight stays in German
towns and cities by size
in 2022



Culture an important facet of global Germany marketing

1st place for Germany as a
cultural destination* among
worldwide travel by Europeans.

26 % of all international
holiday trips to Germany
are **cultural trips****.

1.8 high overall satisfaction***
among holidaymakers
from abroad for **culture holidays**.

Most pressing **global issues** as viewed by Europeans

1st Protecting the environment
and the **natural resources** **30%**

2nd Reducing poverty **28%**

3rd Increasing
living conditions
and **quality of life** **26%**

High scores for Germany in sustainability

Germany **ranked***

3rd

evaluating destinations by their range of offers considering climate and environmental protection/sustainability

Germany **ranked****

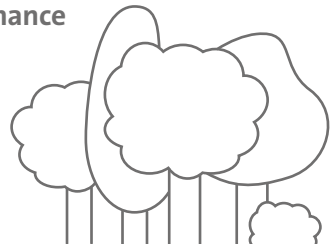
The 2022 SDG Index scores:
Germany 82.18/Rank 6 of 163

6th

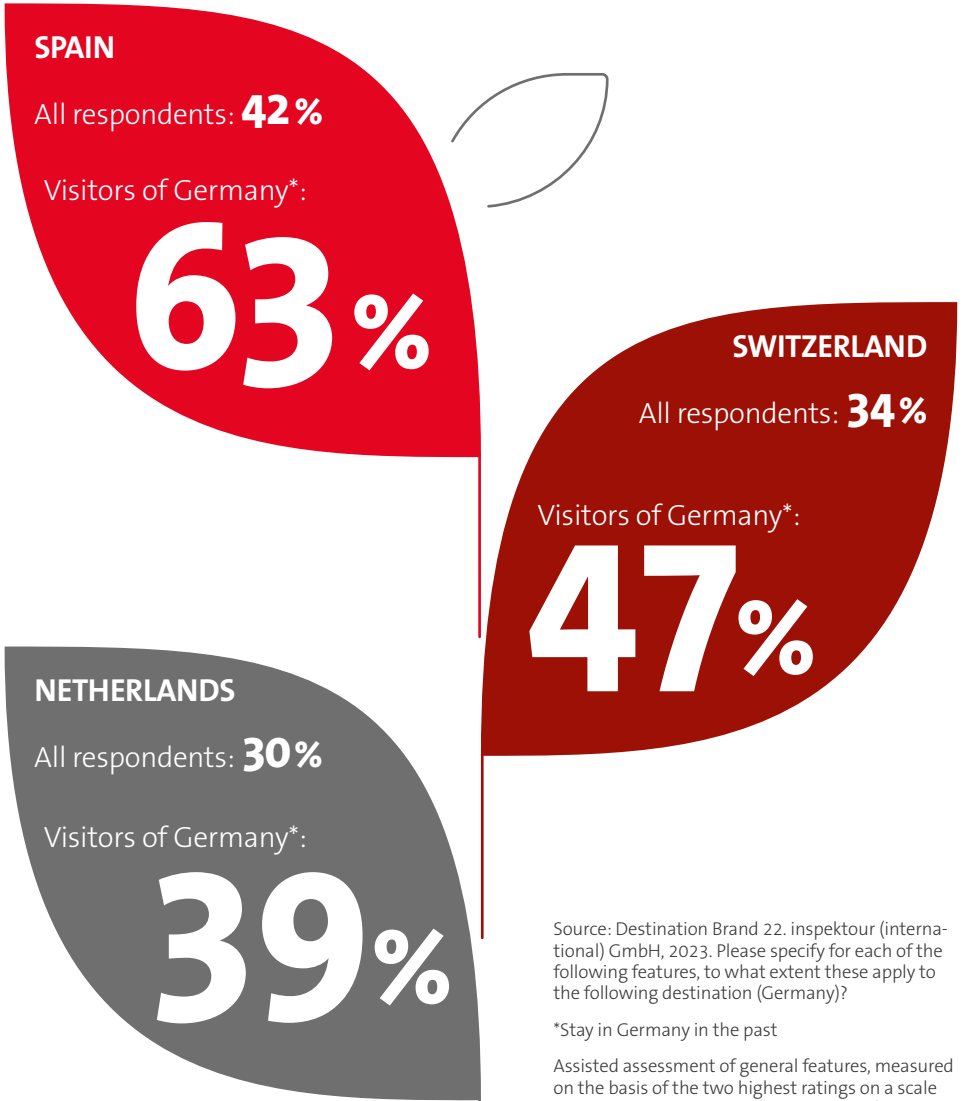
Germany **ranked*****

13th

out of 180 countries,
**Environmental Performance
Index 2022 (EPI)**



Perception of Germany as a **sustainable destination** increases after a stay



Source: Destination Brand 22. inspektour (international) GmbH, 2023. Please specify for each of the following features, to what extent these apply to the following destination (Germany)?

*Stay in Germany in the past

Assisted assessment of general features, measured on the basis of the two highest ratings on a scale from 5 = very high to 1 = no interest at all, number of interviewees in DB2022: 1,000 per source market

Top 5 Destinations Destinations & Sustainability

Benchmark of 10 European nations

Good = 3, Average = 2, Poor = 1



How would you rate the following destinations and their offer spectrum with regard to climate and environmental protection/sustainability?

Source: Sustainability & Travel, results of 27 source markets, IPK International October 2022

The interests of sustainability oriented holiday-makers: **Nature, Monuments and Culture**

The sustainability oriented target group is particularly interested in the following holiday activities.

83% “Enjoying **nature**”

74% “Visiting **castles, palaces and cathedrals**”

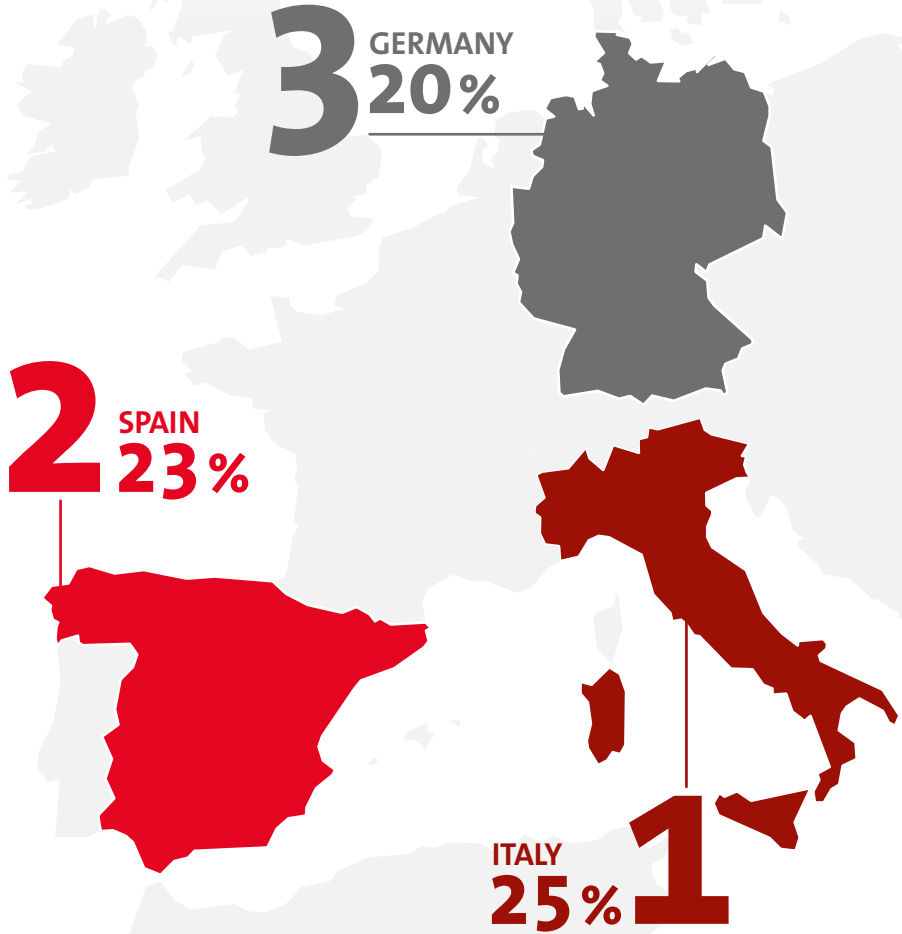
71% “Visiting **cultural institutions/**
using **cultural services**”

Average values of the source markets Austria, Switzerland, Netherlands, France, Italy, Spain, UK, USA and China based on representative online surveys considering the general interest in each holiday activity (not specific to Germany), measured on the basis of the two highest ratings (Top-Two-Box) on a scale from 5 = very high to 1 = no interest at all

Source: Destination Brand 21; inspektour (international) GmbH

Travel intentions worldwide*

from January–December 2023, per Destination



Source: Survey on travel intentions, IPK International 2023, multiple answers permitted
*16 selected markets worldwide

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