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The travel destination



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Innovative ■ Sustainable ■ Digital

ANNUAL REPORT

2019

Destination Germany

**10TH RECORD RESULT
IN A ROW**

+2.5%

89.9

**MILLION INTERNATIONAL
OVERNIGHT STAYS IN 2019**

(provisional figures, Federal Statistical Office, 10 February 2020)

The 2.5 per cent increase in inbound tourism in 2019 confirms that Germany is continuing to benefit from the sustained growth in European and global tourism. It also consolidates Destination Germany's strong position in the international tourism market.

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Dear friends and colleagues, valued partners in the German tourism industry,



Global tourism continued to grow in 2019. According to the latest figures published by the United Nations World Tourism Organization (UNWTO), 1.5 billion international arrivals were recorded in 2019, a 3.8 per cent increase on the previous year.

The steady growth in the volume of travel boosts the economy in the countries visited and promotes understanding between nations. But at the same time, the global travel industry is facing increasing challenges. The growing use of digital technologies is disrupting traditional business models. Climate change has become a central topic of public debate in many countries. Political upheaval, trade disputes, economic crises and Brexit affected many of Germany's key source markets in 2019. And the crisis in the Chinese market caused by the coronavirus is creating further uncertainty within the industry.

Despite these difficult conditions, Destination Germany secured a healthy share of the global growth in 2019.

We posted a record result for the tenth year in succession. We – and our partners – can be truly proud of this. Around 90 million overnight stays by international visitors is solid evidence of the strong positioning of our product in an ever more fast-moving and competitive environment.

Our global marketing activities continue to centre on our campaigns, each of which seeks to showcase Destination Germany and all its many facets from a new angle.

'Celebrating Bauhaus' inspired culturally minded visitors from many countries to learn more about the Bauhaus movement, which originated in Germany. 'Destination Germany – 30 years after the fall of the Berlin Wall' showed how the choice of attractions and experiences available to visitors to Germany has grown over the past three decades and how Germany is continuing to increase in popularity among international tourists.

We also report on our cross-media campaign 'German Summer Cities', which used social media, events, marketing tie-ins and collaborations with leading online travel companies (OTCs) to capture the imagination of well over 300 million potential customers all over the world. The campaign was so successful that we are extending it to additional high-potential markets in 2020.

Our annual report also looks ahead to the future. We analyse upcoming challenges and the strategy for current projects.

The future-focused topic of sustainability has long been a key aspect of Destination Germany's core brand. In view of the high

social relevance of this issue, in 2020 we will be introducing a new marketing campaign, *#WanderlustGermany*, with products that underpin sustainable tourism and promote rural regions.

We are continuing to make great strides with the implementation of our digital strategy. One area in which we are particularly keen to see progress is in the open-data project for Germany's inbound tourism industry. We are driving this complex process forward together with our national and international network.

The successful delivery of campaigns with international appeal and the implementation of innovative technological solutions for the entire German tourism industry can only succeed with the help of a strong network. We would therefore like to thank all our members, sponsors and partners for their consistent and productive support.

The Executive Board of the GNTB is particularly grateful to the decision-makers at the Federal Ministry for Economic Affairs and Energy (BMWi), in particular State Secretary Thomas Bareiß (Member of the German Parliament) in his role as Federal Government Commissioner for Tourism, the parliamentarians on the German Bundestag's Tourism Committee and the parties' spokespersons on tourism policy for their constructive dialogue and steadfast support.

Special thanks also go to the staff of the GNTB at head office and in the foreign representative offices and sales and marketing agencies for all their hard work.

Finally, we would like to mention at this point the support the GNTB receives from its committees. Invaluable advice and assistance has been provided in particular by the Board of Directors and its president, Brigitte Goertz-Meissner, vice presidents Hubert Aiwanger, Peter Siemerling and Guido Zölllick, and honorary presidents Klaus Laepple and Ernst Fischer, and by the marketing committee and advisory board. We are very grateful to them all.


Petra Hedorfer
Chief Executive Officer


Reinhard Werner
Commercial Director

Thomas Bareiß, Member of the German Parliament

Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy and Federal Government Commissioner for Tourism



Dear readers,

2019 has been another extremely fast-moving year – especially for the tourism industry. Despite a global economic slowdown, trade tensions, social unrest and the uncertainty surrounding Brexit, figures published by the World Tourism Organization show a further increase in global tourism. By the end of the third quarter, arrivals had risen by 4 per cent globally and by 3 per cent in Europe.

Germany more than held its own in this fierce competitive environment. An increase of 2.5 per cent to almost 90 million overnight stays by international visitors meant the tenth record result in a row for Germany's inbound tourism industry.

The German National Tourist Board (GNTB) was a major contributor to this success with its strong network of partners within the German tourism sector and the international travel industry,

its creative campaigns and its willingness to embrace the opportunities offered by the digital transformation.

The GNTB annual report documents in impressive style how the organisation's hard work has paid off.

Through its funding, the Federal Ministry for Economic Affairs and Energy helps the GNTB to further strengthen Germany's position as a travel destination in the source markets while at the same time breaking into new high-growth markets.

The federal government has a vital interest in a prospering inbound tourism industry for a number of reasons. Firstly, tourism is a crucial part of Germany's economy. It provides almost three million jobs and contributes around €105 billion to gross value added. Secondly, there is a close link between tourism and a country's reputation.

A country with a positive image is more likely to be chosen as a travel destination, while tourism highlights, excellent service and a culture of being very open and welcoming make a country more attractive as a place to invest and do business.

International tourism also helps to promote cultural exchange, understanding between nations and the broadening of horizons. In a globalised world, it also supports economic and social stability in developing countries.

Despite all the positive growth forecasts for the next few years, it is important to recognise that the travel industry is facing a number of major challenges. Tourism has to work in harmony with nature and the environment and also has a part to play in combating climate change. Overtourism is what happens when the development of tourism infrastructure fails

to keep pace with growing demand. The growth of the digital economy is having an impact on the travel industry. Other challenges lie in the areas of demographic change, the structural weaknesses of rural areas, more people wanting to travel and a changing security environment.

The German government recognises these challenges and is firmly committed to using the opportunities presented by tourism to benefit our country. That is why we are currently working flat out to develop the first ever fully integrated national tourism strategy.

In its cabinet decision of 30 April 2019, the federal government adopted a position paper to provide a framework for the national tourism strategy. The strategic goals defined in the position paper provide an outline of the most important areas of action. The development of inbound tourism, through

which we hope to secure a share of the international growth, is explicitly stated as an objective in the position paper. The GNTB has a key role to play in this context. A broad-based dialogue process began in early 2020 with the aim of soliciting, developing and discussing ideas.

This annual report documents how the GNTB is already working on the future-focused tasks of Germany as a tourist destination.

Nowhere is this more obvious than in its efforts to keep pace with the digital revolution and to promote sustainable tourism. The German tourism industry's joint open-data project has also made good progress thanks to coordination by the GNTB. The marketing campaigns are evidence of the successful use of digital communication tools. Destination Germany is very well positioned as a sustainable travel destination among the international competi-

tion. A lot of work is also being put in to expand the barrier-free tourism offering. All of these efforts are resonating with both German and international visitors and ensure that our wonderful, cosmopolitan and multi-faceted homeland is being visited by an ever growing number of people.

I would like to take this opportunity to thank the Executive Board and the whole GNTB team for all their hard work and to encourage them to continue on the path that has brought them so much success.

I hope you enjoy reading this report.

Thomas Bareiß

Dr Sabine Hepperle

Director-General responsible for SME policy at the Federal Ministry for Economic Affairs and Energy (BMWi)



Dear friends, colleagues and partners

The annual report of the German National Tourist Board presents an impressive success story: German inbound tourism is growing steadily and remains competitive in the international market.

The tourists who come to Germany from other countries spend money here, contributing to value added and supporting jobs in the companies operating in the tourism sector. The vast majority of these companies are small and medium-sized businesses (SMEs): cafés and restaurants, hotels, retailers, tour guides, museums, tourist attractions and many others.

For the German government, creating a climate in which SMEs can thrive is a top priority. In the travel industry in particular, the connection between a flourishing SME sector and the successful development of tourism is particularly clear.

Let me explain this using the example of attracting and retaining skilled workers. SMEs help to ensure the success of the degree apprenticeship system be-

cause they offer students the chance to put theory into practice on a daily basis and gain valuable experience. SMEs also support the skills training of people who did not continue their education after leaving school or dropped out of their course, and provide employment for many people with a migration background.

Service-oriented, highly skilled workers in businesses within the tourism sector play a major role in making Germany an appealing travel destination. Visitors who feel welcome and at home here will recommend Germany as a travel destination to others – the best form of advertising there is.

Jobs in these tourism companies cannot be exported. They are rooted in the country and the place where visitors take their holidays, meet with business contacts or attend events. SMEs within the tourism industry revitalise the rural regions and thus play a pivotal role in preventing migration from these areas to the towns and cities, while high-quality services enhance the appeal of the tourism offering.

However, SMEs often lack the resources and expertise required to market their products and services internationally.

The GNTB is a strong partner to such companies. It shares its expertise in key competence areas with its partners and enables small firms to participate in global campaigns and to link up with partners in the international travel industry.

This annual report presents a number of successful examples showing how the work of the GNTB provides practical support for the development of SMEs in Germany.

For these achievements and for their fantastic work last year, I would like to extend my heartfelt thanks to the Executive Board and the whole team at head office and in the foreign representative offices.

Dr Sabine Hepperle

Dear friends, colleagues and partners, dear readers,

Brigitte Goertz-Meissner

President of the Board of Directors of the German National Tourist Board



Tourism is evolving – as has been proven many times and in many different ways over the past year.

Globally, the number of people travelling is on the rise and for many of them, Germany is the destination. This meant that 2019 was another record year for inbound tourism to Germany – the tenth in succession.

There are many reasons for this. A central location in Europe, a rich culture, captivating natural landscapes, excellent value for money and high standards of service are among the factors that make Destination Germany so attractive to visitors. But this alone is not

enough to ensure success in the global travel market.

A strong network of partners within our own country, in the international travel industry and among the global online platforms is essential. Intensive communication with vibrant content, exciting campaigns and up-to-date information is required at each of these levels. Social networks and digital technologies open the way to potential customers for companies that are able to adopt the right communication style and fill their channels with inspiring content.

These and many other components come together in the global marketing

for Destination Germany. I would like to congratulate Petra Hedorfer and her team for the excellent results in 2019.

But it is not just tourists who are on the move: the travel industry itself is undergoing radical change. In many countries, including source markets for Germany's inbound tourism industry, an anti-flying sentiment is beginning to emerge as a result of the climate debate. The sharing economy is opening up new business models – often at the expense of established companies with traditional structures. Immersive technologies such as virtual or augmented reality are gaining ground. Artificial intelligence and conversational inter-

VICE PRESIDENTS OF THE GNTB BOARD OF DIRECTORS



Hubert Aiwanger,
Bavarian State Minister of Economic Affairs, Regional Development and Energy



Peter Siemering,
Managing Director of WFB Wirtschaftsförderung Bremen GmbH (Bremeninvest)



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 the German Hotel and Restaurant Association (ret.)

faces are rapidly becoming established among potential customers. The close integration of digital technologies, the processes of concentration and globalisation in the international travel industry, and rapidly changing consumer behaviour are creating ever greater challenges for the management of data and data flows. In 2019, the GNTB drew on its network and expertise to help drive forward the German tourism industry's open-data project.

As we move into the new decade, we can confirm that the tourism industry is continuing to evolve. The GNTB is the platform that uses 21st century technology to position Destination

Germany as an exciting travel destination in a highly competitive market. The Board of Directors welcomes and firmly supports the Executive Board's commitment to pressing ahead with these modernisation processes.

That is why additional funding was made available in 2019 on top of that provided by the Federal Ministry for Economic Affairs and Energy in 2018.

I would like to thank all the GNTB's political partners for their support – in particular State Secretary Thomas Bareiß (Member of the German Parliament) in his role as Federal Government Commissioner for Tourism, the

parliamentarians on the German Bundestag's Tourism Committee and the officials responsible for tourism at the Federal Ministry for Economic Affairs and Energy.

My colleagues on the Board of Directors and I look forward to continuing our excellent working relationship with all our partners in Germany's inbound tourism industry.

Brigitte Goertz-Meissner



Petra Hedorfer

Chief Executive Officer of the GNTB

Ms Hedorfer, 2019 was another successful year for the GNTB. What are the key challenges that Germany is currently facing as a travel destination?

Even after a successful 2019, the long-term challenges remain. Let me pick out three examples.

Destination Germany is facing stiffer competition as other European travel destinations vie for a share of the growing tourism market.

Experts are forecasting a further cooling of the eurozone economy, trade disputes are on the rise, and uncertainty for British citizens about what happens after Brexit remains high. Yet a positive economic outlook in the source markets is a key factor in consumer spending and people's appetite for travel.

And last but not least, the digital revolution has already brought significant change to large parts of our entire value chain. These are ongoing processes that will continue to keep us busy in the future.

The GNTB has little influence over the first two points as they are more of an external nature. But let's talk about digitalisation in greater detail. Last year's buzzwords were 'immersive technologies' and 'conversational interfaces'.

Where do you see the GNTB today?

We are carefully analysing technological developments, monitoring their use in the global travel industry and reviewing whether it makes sense for us to use them. Virtual reality, for example in the shape of 360° videos, is already a firm fixture in our marketing mix. Following an initial test run with Amazon Echo, we have launched further projects for voice assistants. This enables us to promote Destination Germany's USPs using the latest technology.

I think the GNTB is in a strong position vis-à-vis our competitors. But we find ourselves in a time of rapid global change, and we cannot rest on our laurels.

That brings us back to another of last year's hot topics, open data. Why is it so important?

We see open data as a key response to the technological and commercial changes that the global tourism industry is currently undergoing. Some European countries have already identified the potential benefits and developed knowledge graph solutions that incorporate multiple destinations. That is why we have to act quickly, otherwise we may find that we are lagging behind our competitors.

The expectations that tourists have of what is on offer at their destination are also changing.

The best way to come out well in the public debate, including in our international source markets, is to focus on quality tourism. This is also the approach most likely to meet with success. Many of our tourism partners already use resources responsibly, have a strong customer focus and offer an excellent level of service each and every day. We are incorporating this into our marketing strategy.

Shaping success sustainably using innovative themes and the latest technology

The GNTB is at the helm of a project that affects the entire tourism industry. Why?

Making data available in a knowledge graph only makes sense if it represents the tourism offering in German as comprehensively as possible, and if the data can be found and marketed at as many touchpoints as possible. We have the strong network of relevant partners in the German tourism industry, the international presence, the contacts to the global platforms and the extensive knowledge of the new digital technologies needed to successfully drive the project forward with our tourism partners.

Climate change is increasingly dominating public discourse. Does that impact on inbound tourism to Germany?

Germany is already well established in the international market as a sustainable travel destination. But we can already see that consumer habits and expectations are changing over the medium term in important source markets for inbound tourism to Germany. Air travel from Scandinavian countries dropped in 2019 – in contrast to the overall increase in travel from the region. This shows that there are shifts in the modal split for the main means of transport used.

What can the GNTB do specifically in this context?

Since we established our innovations management in 2012, we have continually worked to embed sustainability in our core brand.

We are focusing our marketing on specific sustainable offerings. A growing number of service providers, for example in the hotel and restaurant industry, but also at the destinations, are raising their game when it comes to sustainability. We support these businesses by providing an international platform for their marketing.

In 2019, we initiated 'Feel Good' as an additional communication campaign targeting end customers. This will feed into the global #WanderlustGermany nature campaign in 2020.

Through a mix of online and offline communications we are showcasing Germany as a multifaceted holiday destination that can be experienced and explored sustainably.

THE GERMAN NATIONAL
TOURIST BOARD

MANAGING A GLOBAL NETWORK

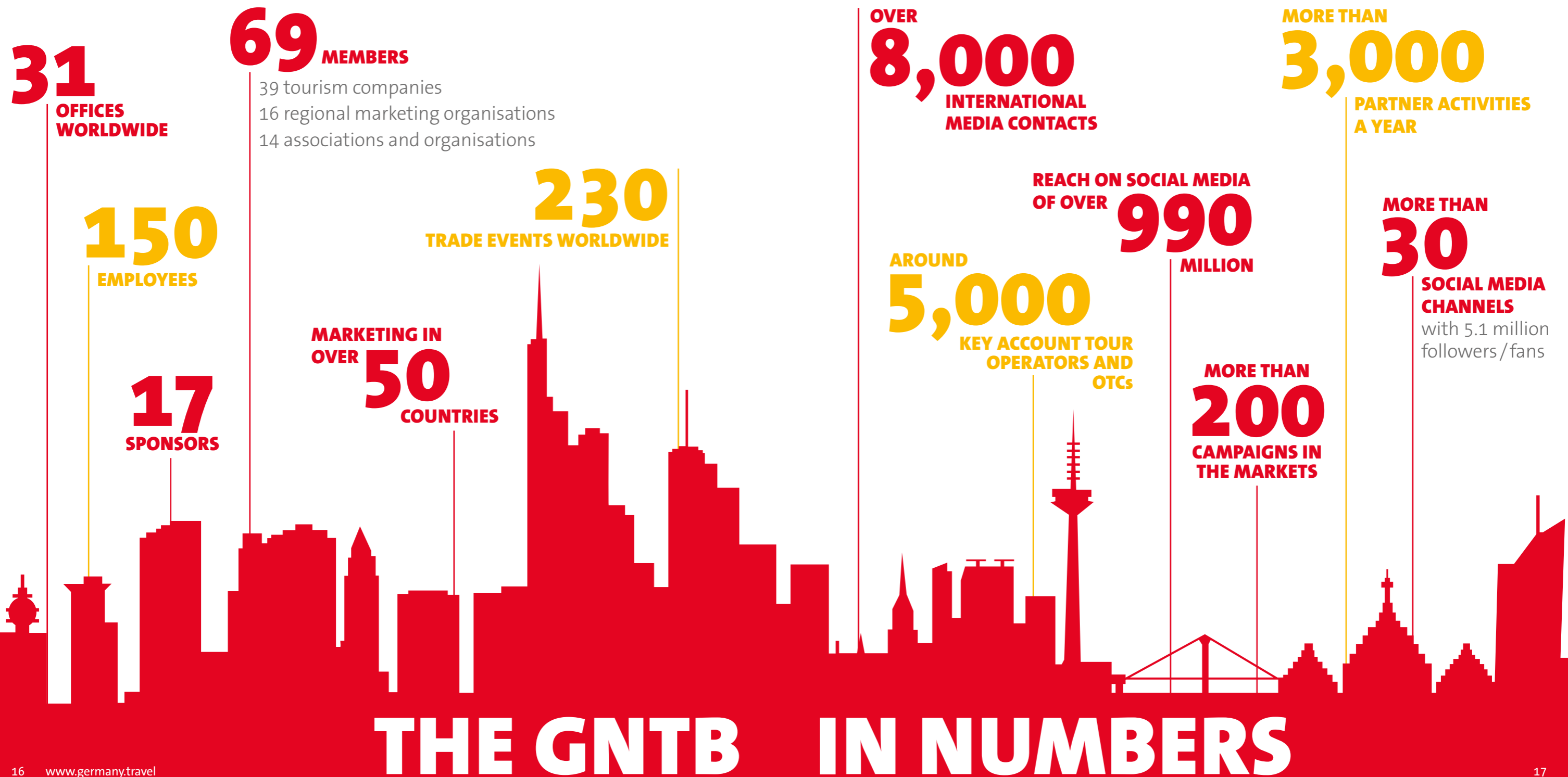
The German National Tourist Board (GNTB) initiates and coordinates the global marketing of Destination Germany through an extensive network. Its international marketing activities support Germany's tourism industry, which predominantly comprises small and medium-sized enterprises.

The German National Tourist Board

The German National Tourist Board (GNTB) promotes Germany around the world as a travel destination. In accordance with its charter, the GNTB runs global marketing activities that aim to enhance the positive image of German towns, cities and regions abroad and encourage people to travel to Germany.

The GNTB works on behalf of the German government. Funding for the GNTB as an institution is provided by the Federal Ministry for Economic Affairs and Energy (BMWi) in accordance with a resolution passed by the German parliament.

The GNTB supports the federal government’s aim of enhancing the capacities and competitiveness of the tourism industry – which predominantly consists of small and medium-sized enterprises – to secure jobs in the sector and to boost the economies of less well-developed rural regions through the promotion of tourism.



The GNTB's medium-term and long-term objectives and tasks

Marketing Germany as a travel destination around the world is an important objective of the federal government's tourism policy. As tourism is an important economic factor in Germany and makes a considerable contribution to gross value added and employment, it is very much in the interests of the federal government to strengthen tourism in Germany by promoting growth in inbound tourism.

Supporting inbound tourism helps to secure and create jobs in the tourism industry – which predominantly comprises small and medium-sized enterprises – and to boost the economies of underdeveloped regions. Inbound tourism benefits not only the tourism industry but also other sectors in Germany, such as retail. It works towards enhancing Germany's image around the world, which in turn has a positive influence on international cooperation and makes Germany more attractive in the market for people and investment. Central to the pursuit of these objectives is the German National Tourist Board (GNTB), which is funded by the Federal Ministry for Economic Affairs and Energy (BMWi) in accordance with a resolution passed by the German parliament. The GNTB is tasked with promoting Destination Germany to international markets.

Objectives and tasks assigned to the GNTB for 2020

The BMWi links the federal funds provided to quantitative and qualitative targets and tasks which are set in consultation with the GNTB. In 2020, these will mainly reflect the changing market and the growing use of digital technologies. To enable the GNTB to meet the resulting challenges, the BMWi has permanently increased its funding by a total of €3 million in its 2018 and 2019 budgets.

The World Tourism Organization forecasts that international arrivals will rise to 1.8 billion by 2030. Europe will be the leading source and target market for global tourism, though its market share as a destination is set to fall from 51 per cent in

2010 to 41 per cent in 2030. This drop will lead to increased competition with the other European countries. At the same time, the potential doubling of overnight stays by overseas visitors (up 103 per cent by 2030) forecast by the GNTB in 2013 shows that globalisation presents opportunities for Destination Germany. The GNTB is well prepared for this as it has been active in high-potential markets such as China, Japan, India and Brazil for many years. The new regional offices in Singapore and Buenos Aires that opened in early 2017 will provide further support.

Cutting-edge technology is the driving force behind digitalisation. The transparency of information (available any time, anywhere) and the dominance of a handful of digital platforms in search, social media and online marketplaces have a considerable influence on customers' search, booking and travel behaviour. This means that the GNTB has to invest in digital infrastructure. Its website is only one of many channels where customers can find inspiration and information on travel destinations. The influence of social media along the entire customer journey has led to a broader scope of interaction with the customer – before, during and after the trip. This requires tools such as apps, blogs and forums, which need to be developed and maintained.

Given the increasingly fierce competition between destinations, the availability and management of data at every level of the tourism industry plays a key role. This is the purpose of the joint open-data project of the German tourism industry, which is coordinated by the GNTB.



Berlin, dome of the Reichstag building

Marketing themes

The GNTB's marketing themes are based on the core facets of the Destination Germany brand, which cover everything from arts and culture, romance and Romanticism to nature and active pursuits, food and tradition, and design and lifestyle. The GNTB addresses the megatrends that reflect these facets through its 'towns, cities & culture' and 'nature & relaxation' product lines. It also promotes any themes and anniversaries for specific events or markets that are particularly relevant to tourism. 2020 is the 250th anniversary of the birth of Ludwig van Beethoven. The importance of this event is reflected in the sales and marketing activities of the 'Discover Beethoven' campaign. Another GNTB campaign entitled *#WanderlustGermany* is promoting active pursuits and holidays in nature. The GNTB is also working with the organisers of the Oberammergau Passion Play to support the international marketing of this unique cultural event, which will take place for the 42nd time in 2020.

Marketing tools

The GNTB develops innovative ideas and the appropriate tools to market Destination Germany around the world with a focus on specific themes. It analyses and assesses current developments and medium- to long-term trends in travel behaviour and uses the findings as the basis for its targeted marketing. The results of its market research provide the foundation for all activities, both with regards to the sales channels selected and to the economic potential and growth prospects in current and future source markets, and the GNTB uses the funds that it is provided with accordingly.

Supporting the federal government's tourism policy

As part of its marketing remit, the GNTB supports the current focal points of the BMWi's tourism policy, which are linked to structural and socio-political interests. These include support for SMEs, the promotion of tourism in rural areas and inclusive tourism. In this context, the GNTB coordinates and takes part in joint activities and committees at home and abroad. It ensures that its work is targeted, cost-effective and compatible with its marketing remit. The GNTB's foreign representative offices identify opportunities to collaborate with German institutions abroad, in particular the embassies, the representative offices of Germany Trade & Invest, the Goethe Institute and organisations in the worldwide network of German chambers of commerce.

Performance monitoring

The GNTB's activities are audited annually to ensure that it uses public funds effectively, economically and for the purposes of fulfilling its remit. This includes an evaluation of the GNTB's foreign representative offices – an idea developed in consultation with the Federal Ministry for Economic Affairs and Energy – and the analysis of how suitable the marketing activities for Destination Germany have been overall and whether they have influenced travel decisions.

The GNTB's network

The GNTB's members, sponsors and partners form a closely knit network that contributes to the successful global marketing of Destination Germany and provides the foundation for dynamic relationship management in Germany's inbound tourism industry.

A key task of the network is to help the many small and medium-sized enterprises in the tourism sector to access international markets.

As members, they can make use of the GNTB's expertise, take part in cost-efficient and targeted marketing campaigns, and appear alongside the GNTB at trade fairs, workshops and roadshows.

COMBINING STRENGTHS

The cornerstones of the GNTB network are its members: companies from the tourism industry, the marketing organisations of the federal states, and trade associations. In accordance with its charter, all companies or organisations of national importance are eligible for GNTB membership provided that their activities support the aims and objectives of the GNTB. This creates a multi-layered network that dynamically strengthens the expertise and international presence of all participants. It is a stated aim of the GNTB, in accordance with the remit it has been given by the Federal Ministry for Economic Affairs and Energy, to develop these partnerships and attract new members.

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.

**69 MEMBERS AND
17 SPONSORS**

are part of the GNTB network.

Strategic partners play a prominent role in the network. Lufthansa and Deutsche Bahn are more than just members. They help to shape and promote Destination Germany by providing contributions in kind, sharing knowledge and participating in extensive collaborations.

More than half of all GNTB members are commercial enterprises. With Deutsche Bahn, international commercial airports, airlines and car rental companies among our members, the network has travel to and within Germany well covered. The hotel industry is represented by everything from budget accommodation for young travellers to luxury hotels.

Companies offering unique travel experiences in Germany benefit from the added value of GNTB membership just as

A REPRESENTATIVE CROSS-SECTION OF THE INDUSTRY

much as those operating in shopping tourism. Travel insurance providers and other tourism-related businesses complete the portfolio of member companies.

As part of its strategic marketing efforts, the GNTB regularly signs up new partners in the shape of companies, organisations and associations. It looks for organisations whose particular expertise will help to enhance its international activities.

NEW GNTB MEMBERS IN 2019



Hertz Autovermietung GmbH

"The Hertz Green Collection and the vendor-neutral Hertz 24/7 car sharing technology are welcome additions to the range of climate-friendly and progressive transport solutions for international travellers in Germany. We hope that membership of the GNTB will provide us with additional contacts that will enable us to further expand our share of inbound business in Germany."

ALIDA SCHOLTZ

Managing Director of Hertz Germany



TRAVEL EASY

Travel Easy Innovation GmbH

"Over a billion Chinese are already using mobile payment solutions from Alipay. Through its digital services, Travel Easy plays a key role in improving the way that the specific needs of Chinese guests are met. By joining forces with the GNTB, we aim to expand our network and further enhance our service. GNTB members such as GALERIA Karstadt Kaufhof, Munich Airport and the Meissen porcelain manufactory are already on our list of key accounts."

YANG YANG

CEO of Travel Easy Innovation GmbH

NEW SPONSORS IN 2020



Federal Association of German Destination Management Companies



Staatsbad Norderney GmbH

NEW GNTB MEMBERS IN 2020



JCB International Co. Ltd

"We are a global provider of payment systems with roots in the high-growth source markets of Asia. We offer our customers cutting-edge technologies and payment options that enable secure and simple payment around the world. As a member of the GNTB, we aim to increase the number of locations where our cards are accepted by encouraging tourism companies in Germany to use our services. This will allow them to offer their international customers an even more convenient travel experience."

TILL WEIGL

General Manager Sales and Marketing Germany



Visa Europe Management Services Ltd., German Branch

"Visa brings together 3.3 billion credit card holders with 46 million acceptance points and 16,000 financial partners. We offer our customers and business partners innovative payment technology in more than 200 countries. In partnership with the GNTB, we aim to further expand our marketing presence in one of Europe's leading travel destinations."

JÜRGEN SCHÜBEL

Head of Merchant Solutions & Acceptance, Visa



GTM Germany Travel Mart™, 12 – 14 May 2019, Wiesbaden

The tourism policy spokes- persons of the political parties on the Tourism Committee of the German Bundestag

The Tourism Committee raises public awareness of the economic significance of tourism through its initiatives, reviews and hearings.

WHAT DO YOU CONSIDER THE KEY AREAS OF YOUR WORK ON THE TOURISM COMMITTEE THIS YEAR?



SEBASTIAN MÜNZENMAIER
Member of the German Parliament, AfD,
Chairman of the Tourism Committee of the
German Bundestag

The collapse of Thomas Cook was a huge shock, and its after-effects are still being felt today. That is why we must

“If we want to develop tourism outside of our major cities, then we cannot ignore the local pub or café.”

ensure that consumers do not lose faith in inclusive package tours. One of our key tasks over the coming months will be to review our holiday protection scheme, and we will need to make certain that the new regulations offer effective cover for travellers. This is the only way that the core brand of package holidays can be maintained.

We will also have to give some thought to how high street holiday sales can be strengthened. Local travel agents should be given a fair chance of success, and the same applies to our hospitality providers. Their businesses are often at the heart of the community, especially in rural areas. If we want to develop tourism outside of our major cities, then we cannot ignore the local pub or café. Tourism policy has to take a lead, but the government's new law forcing retailers to issue paper receipts is sending the wrong signal.



KERSTIN KASSNER
Member of the German Parliament,
Spokesperson on Tourism Policy for
DIE LINKE

“Every child should have gone on a trip at least once during their time at school.”

also turn its attention to the issue of accessibility across the tourism sector. If tourism is to develop further, it is essential that we have functional and affordable public transport throughout the country.

I believe that travel for children and young people remains an important topic this year. Despite all the small wins that we have fought for in this area, we are still experiencing setbacks, such as Deutsche Bahn’s decision at the end of last year to abolish the Rail Inclusive Tours (RIT) tariff. Every child should have gone on a trip at least once during their time at school. This should be considered the norm, but regrettably it is not. I believe that creating the policy framework to achieve this remains one of the Tourism Committee’s key tasks in 2020. The committee must



PAUL LEHRIEDER
Member of the German Parliament,
Spokesperson on Tourism Policy for the
CDU/CSU

The federal government’s national tourism strategy remains the most important topic, and the CDU/CSU parliamentary group in the Bundestag is helping to draw it up.

“The federal government’s national tourism strategy remains the most important topic.”

It is based on the demands made in the coalition proposal passed by the German parliament in November 2019. Key objectives include better coordination of tourism policy, doing even more to cut red tape, making it easier to access funding, supporting sustainability and introducing measures to mitigate the shortage of workers, particularly skilled ones, in the tourism sector.

Other important areas our parliamentary group will be focusing on include nature tourism, with an emphasis on national parks, nature parks and biosphere reserves, as well as cruises and health tourism. Tourism and development partnerships and digitalisation, especially networking and marketing Germany’s tourism regions, will also feature prominently. The GNTB’s international marketing of Germany as a travel destination will play a role in many of these areas.



CHRISTOPH NEUMANN
Member of the German Parliament,
Spokesperson on Tourism Policy for the AfD

Tourism policy has to focus on areas where there are problems for travellers or the travel industry. The CDU and the SPD made considerable mistakes in the implementation of the European Package Travel Directive in Germany, and Thomas Cook customers, many travel agents and soon taxpayers too will be paying the price for this. Consumer protection has also suffered, and I believe this has to be remedied as well.

“And last but not least, we should be looking at how the necessary structural changes in the sector can be supported through new tourism models.”

The future of cruise tourism should also be reviewed, and we will be advocating a more in-depth assessment of opportunities and risks here. And last but not least, we should be looking at how the necessary structural changes in the sector can be supported through new tourism models. The transformation of disused open-cast mines into recreation areas, for example, can present rewarding opportunities for water-based tourism and the hospitality industry. This must be supported through policymaking.

Despite considerable challenges, 2019 was the tenth successive record year for travel to Germany. A lot of that is down to the excellent work of the GNTB.

We have identified two major challenges for the tourism sector that we will have to face: climate change and the shortage of skilled workers. Through the committee, we want to establish a framework that enables the tourism sector to manage these issues for the long term.

That is why our focus for a forward-thinking tourism strategy is on increasing the pool of skilled workers, updating job profiles and improving cooperation between federal and regional governments when it comes to tourism. Our actions are shaped by climate change, in particular, as tourism not only causes it but also suffers from its consequences. It is important that climate protection has the minimum possible social impact while also reducing the damage that tourism causes to the environment and the negative consequences for the local population.



GABRIELE HILLER-OHM
Member of the German Parliament,
Spokesperson on Tourism Policy for the SPD

“Our actions are shaped by climate change and the shortage of skilled workers, in particular.”

Travel to Germany bucked the general economic trend by enjoying its tenth successive record year, thanks in no small part to the excellent work of the GNTB and of the many tourism establishments and their employees. Nonetheless, the entire industry is fac-

“The GNTB’s outstanding international marketing should be an example for us.”

ing huge challenges. We are still playing catch up when it comes to digitalisation, and red tape is on the increase – we want to see significant change in this respect. Then there is the shortage of skilled workers, a problem that threatens the livelihood of the hospitality industry, in particular. The situation is so bad that the government is warning that many hospitality providers in rural areas could close down. The GNTB’s outstanding international marketing should be an example for us. If the government took the same professional approach to advertising vacancies for skilled workers as the GNTB does to promoting inbound tourism to Germany, then we might one day be talking of record recruitment in the hospitality sector. Everyone will be delighted if we enjoy further record years, but this will only be possible if we continue to have great hospitality providers.

The Green Party is committed to ensuring that the national tourism strategy creates the right framework for sustainable and forward-thinking tourism in Germany. Through our initiatives we try to get involved in this process and set our priorities: socially responsible tourism, sustainable HR management for the industry, better transport and the climate-friendly restructuring of tourism, including through funding



MARKUS TRESSEL
Member of the German Parliament,
Spokesperson on Tourism Policy for
Bündnis 90/DIE GRÜNEN

“We want to preserve Germany’s attractiveness and diversity as a tourism destination.”

that is better managed and oriented towards adding social, ecological and economic value. In this respect, we need better basic research. We want to equip SMEs for the future, promote digitalisation and reduce bureaucracy. We want to preserve Germany’s attractiveness and diversity as a tourism destination and support the GNTB’s work over the coming years by funding it appropriately. Furthermore, we support a thorough revision of the holiday protection scheme for tour operators and want to see consumer protection strengthened.



DR MARCEL KLINGE
Member of the German Parliament,
Spokesperson on Tourism Policy for the FDP

Germany enjoys a strong position in the international market

SDG INDEX:

Germany among the

TOP 10

ranked fourth in 2018 – ranked sixth in 2019

17 global goals for sustainable development and 169 targets were defined at the UN Sustainable Development Summit in 2015. The SDG index shows how the 193 UN member states are doing in their efforts to achieve them.

Germany has consistently ranked in the top ten of the index. However, experts still see room for improvement in terms of public transport, energy-related per-capita carbon emissions, old-age poverty and the amount of electronic waste generated.

Source: Sustainable Development Solutions Network, 2019

2019 NATIONS BRAND INDEX:

Germany's image ranked

first

as a brand in a comparison of 50 countries

The Nation Brands Index (NBI) developed by Simon Anholt is based on 20,000 online interviews in 20 panel countries. The criteria evaluated by the NBI for the 50 countries are culture and heritage (including sport), governance, exports, people, immigration and invest-

ment potential, and tourism. This provides a representative picture of a country's reputation and image on the international stage.

Source: Nation Brands Index, 2019

For the
sixth time
since 2006

As it will be the 250th anniversary of the birth of Ludwig van Beethoven in 2020, Lonely Planet has ranked Bonn, where Beethoven was born, fifth on its list of cities to visit around the world this year.

LONELY PLANET recommends

Bonn

Source: Lonely Planet, 2019

QUALITY MONITOR SURVEY OF THE GERMAN TOURISM INDUSTRY

89%

OF INTERNATIONAL TRAVELLERS

to Germany are satisfied or very satisfied with their stay.

Source: Quality Monitor survey of the German tourism industry, May 2015 to October 2019 (holidaymakers and business travellers)

ZOOVER CONSUMER PORTAL:

The Dutch rank camping in Germany

first

30,000 Dutch users of the independent consumer portal Zoover voted Germany as the best camping destination in Europe. Germany won the coveted Zoover Award with 8.47 points. It was followed by Austria (8.39), Czech Republic (8.02), France (7.95) and Luxembourg (7.85) in places two to five.

Source: Zoover, 2019

SUSTAINABLE CITIES INDEX: FOUR GERMAN CITIES

in the

TOP 20

Munich (ranked 7th)
Frankfurt (ranked 10th)
Hamburg (ranked 17th)
Berlin (ranked 18th)

The Sustainable Cities Index, created by planning consultancy Arcadis, evaluates 100 cities around the world using the criteria people, planet and profit.

Source: Sustainable Cities Index, 2019

TRAVEL & TOURISM COMPETITIVENESS INDEX OF THE WORLD ECONOMIC FORUM:

Germany ranked

third

The World Economic Forum produces its Travel & Tourism Competitiveness Index every two years. It compares the tourism potential of 140 countries based on a range of criteria and subindexes, including health and hygiene, infrastructure, and environmental sustainability. Germany retained its third place in the overall ranking in 2019.

Source: Travel & Tourism Competitiveness Index, World Economic Forum, 2019

Sustainable and successful The GNTB as an organisation



Green Globe recertification

GOLD STATUS SINCE 2018

Sustainability is a key element of Destination Germany's core brand. As a national tourist board, the GNTB leads by example by continuously reducing its environmental footprint.

In 2019, for the seventh year in succession, the GNTB successfully participated in the Green Globe certification programme. The Green Globe Standard 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.

Regionally connected as an

ECOPROFIT organisation in Frankfurt

The GNTB was first recognised as an ECOPROFIT organisation in Frankfurt (ECOLOGICAL PROject For Integrated environmental Technology) in 2014. ECOPROFIT is a cooperation between local authorities and local businesses that aims to improve environmental protection by reducing the amount of resources that businesses use and optimising their energy efficiency, while at the same time lowering operational costs.

**BRAND EINS/
STATISTA**
GNTB recognised
again as

**Third time
since 2017**

Innovation Master

Through online surveys of 25,000 experts, business magazine brand eins and the market research firm statista have awarded the title of Innovation Master to almost 500 companies that stand out for their "clever products, lean processes, creative collaborators and scope for new ideas". For the third edition of the survey, a multi-stage process examined the following innovation categories: Products & Services, Process Innovations, and Corporate Culture.

INTERNATIONAL ACCOLADES FOR THE GERMAN SUMMER CITIES VIDEO IN 2019

The video for the 2019 campaign and its catchy tune became a viral hit with more than nine million views on YouTube. It also won a number of international awards.



Screenshot from the German Summer Cities video

LATVIA:

Tourfilm Riga

3rd place

Category: Tourism
Destination-Country

POLAND:

FILMAT Poland

Best Film

Category: Promoting City Tourism

US: **INTERNATIONAL
FILM & VIDEO FESTIVAL.**
5th US International Film & Video Festival

Silver

Category: Corporate Tourism Films

GERMANY:
The Golden City Gate

2nd place

Category: National Campaign



CROATIA:
Zagreb TourFilm Festival

3rd place

Category: Tourist
Destination-Country

PROFESSIONAL
MARKETING AT EVERY LEVEL

SHAPING THE FUTURE TODAY

The marketing communications of the GNTB cover all target groups: consumers, service providers and the international travel trade. One thing all the communications have in common is the ability to see the digital revolution as an opportunity and to take advantage of it.

The GNTB's digital strategy is setting standards in the global tourism market

In 2019, the GNTB continued and further developed its digital strategy *#digitalnextsteps*.

A particular focus was the central open-data project for Germany's inbound tourism industry, which is being coordinated and managed by the GNTB.

In addition, the GNTB is turning to immersive technologies such as virtual, mixed and augmented reality and integrating them into campaigns, presentations and trade fair stands. Conversational interfaces, smart speakers and AI projects are also key tools.

#digitalnextsteps

FROM DESTINATION MARKETING TO DATA MANAGEMENT

Progress in the German tourism industry's open-data project

More structure was added in 2019 to the joint open-data project that is being implemented by the GNTB and its partners in the German tourism industry.

The project defines open data as a key answer to the technological and commercial changes that the global tourism industry is currently undergoing. As such, it plays an essential role in the future competitiveness of Germany as a tourist destination.

At the end of the year under review, the need for a common standard for up-to-date information – in order for tourism providers to market themselves efficiently across multiple channels – was widely accepted at the level of the federal states and many destination marketing organisations (DMOs).

During the work process, the future profile for the marketing organisations of the federal states, regions or tourism points of interest became clear. The focus has shifted to the management of data and data flows. Marketing a destination now means managing a destination and, ultimately, managing its data.

A central audit on the current status of data types, content types and technical systems in use was completed as planned. It gave all participants a very clear overview of where they stand and how additional partners can be slotted into the process as seamlessly as possible.

The findings of the audit form the basis for additional process steps at the level of the regional marketing organisations (RMOs) and the technical design of a knowledge graph.



Sharing knowledge via dedicated platforms

A knowledge platform has been available online at www.open-data-germany.org since mid-November. It is accessible to all potential partners and offers support on numerous issues concerning open data.

www.open-data-germany.org

To build the platform, the GNTB has collated all the knowledge gained within the project so far and organised it in such a way that it is understandable to all. Specific recommendations for action and resources should make it easier for users, particularly medium-sized businesses and organisations, to take their first practical steps into the open-data world. In addition to FAQs and technical information, specific help includes user agreements and framework agreements. The knowledge platform is designed as a living system that can be continuously updated with documentation of successful best practice examples, information on the open-data project and other specialist articles.

ONLINE TRAVEL COMPANIES PUSH ONE-STOP SHOPPING

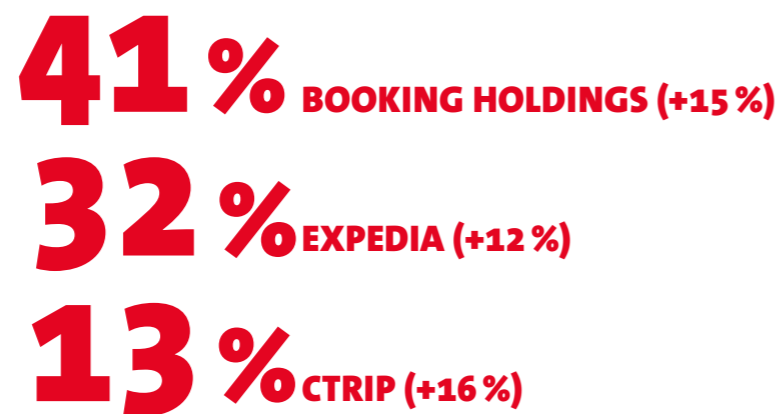
GNTB study analyses global development

Global online travel companies (OTCs) are continuing to drive forward the ongoing concentration process at a rapid pace. That is the key finding of a comprehensive study carried out for the GNTB in December 2019 by KAIROS Future Stockholm.

One aspect examined by the study was which OTCs operate in the most important source markets/source regions of the international travel industry. The global market is already carved up between a small number of players. These are growing much faster than the market as a whole and are thus gaining additional market share from tour operators and from traditional high street travel agencies.

The study also looked at the business activities of the global players and the links between them. It is clear that the concentration process is affecting all services of relevance along the tourism value chain. The main players are gain-

The market shares of the three leading OTCs and their growth in 2018:



Source: GNTB/KAIROS Future Stockholm, December 2019

ing market share by extending their business models but also by acquiring other companies.

As a global market leader, Booking Holdings is pursuing a strategy of becoming a one-stop shop for travel. In China, the world's largest outbound market and currently dominated by Ctrip, it is investing in start-ups in order to establish a foothold in the market.

Expedia relies on bringing together media, tourism organisations and customers. Its activities are mainly concentrated in the US and Europe, although it also operates in South East Asia.

Ctrip was originally focused on the Chinese market but is now staking out its ambition to become an international business by changing its name to Trip.com Group.

Innovative – tech-savvy – connected

THE GNTB'S MARKETING IS INCREASINGLY FOCUSED ON DIGITAL APPLICATIONS

In 2019, the GNTB continued to use the latest technological developments in its marketing. Immersive technologies such as virtual, mixed and augmented reality now form an integral part of campaigns, presentations and trade fair stands. Additional applications for smart speakers and other conversational interfaces are regularly brought to market.

Augmented reality

The 'GNTB AR' app enables the GNTB to communicate with participants at its events by smartphone or tablet. By scanning an image, the user of the app can download additional information, launch videos or enter competitions. As part of 'Discover Beethoven', one of its campaigns for 2020, the GNTB has developed a 3D augmented reality simulation. A second app brings Beethoven to life on smartphones as a realistic moving image that greets the user and even poses for a selfie with them.



Taking a selfie with Beethoven at the 2019 GTM



Scene from the 360° video 'Discover Germany by bike'

360° video

'Discover Germany by bike'

The GNTB uses virtual reality applications in its live marketing, showcasing the delights of Destination Germany by means of the very latest technology. Through the magic of time-lapse photography, a special VR headset (Oculus Go) enables people to experience Germany's cities, attractions and beautiful scenery by bike.

MORE THAN
10,000 PEOPLE

tried out the latest GNTB applications at GNTB events around the world in 2019.



Gropius VR app at the GNTB Brand Summit

Gropius VR app

The legendary workshop of Bauhaus founder Walter Gropius in Weimar was the subject of particular attention during the Bauhaus centenary year. The virtual replica created by the GNTB gives people wearing a HTC Vive VR headset the chance to gain an authentic sense of the room and enjoy additional interactive, fun and informative elements.



360° video 'Gondola ride over Germany' at the GNTB's Germany stand at the 2019 ITB

360° video 'Gondola ride over Germany'

The GNTB tested another VR app for tourism marketing in the form of its virtual gondola ride over the whole of Germany. The use of different VR headsets (in this case the Oculus Rift) and apps at trade fairs and workshops helps travel industry professionals to familiarise themselves with the technology.

360° video Beethoven 2020

The app, developed to mark the anniversary year, takes the user on a memorable musical journey through various culturally and historically important locations in Germany with the aid of an Oculus Go headset. Beethoven himself is on hand as a virtual tour guide throughout the trip.

JUST UNDER
570,000 FACEBOOK USERS were enchanted by Germany's wintery castles and palaces in the run-up to the festive season.

Mixed reality app 'Palaces, parks and gardens'

A Microsoft HoloLens enabled virtual visitors to explore selected palaces, parks and gardens such as Neuschwanstein Castle and the UNESCO World Heritage Garden Kingdom of Dessau-Wörlitz in the form of interactive holograms – a unique audio-visual experience that blended virtual and real worlds.



Mixed reality app: 'Palaces, parks and gardens'

Experiencing German castles and palaces in a new AR dimension on Facebook

With the integration of the 'Palaces, parks and gardens' app into Facebook Spark, GNTB became the first national tourist board to harness a new way of inspiring potential visitors via social media and encouraging them to visit Germany.

Since November 2019, Neuschwanstein Castle, Hohenzollern Castle and Sanssouci Palace have been presented as 'winter wonderlands' on the market-specific Facebook pages in the UK, US, Poland, Italy, Hong Kong/China and Scandinavia. A new theme of spring

awakening/summer warmth' was added in early 2020, with Augustusburg Palace, the Royal Gardens of Herrenhausen and the Garden Kingdom of Dessau/Wörlitz House now also ready to be experienced in virtual form.

The innovative AR face filter generated almost

8.5 million
IMPRESSIONS

CONVERSATIONAL INTERFACES

According to a survey by OC&C Strategy Consultants, within the next three years 55 per cent of US households will own a smart assistant. Consequently, conversational interfaces/voice technology have become a key part of companies' digital marketing toolkits.

Back in 2018, the GNTB successfully implemented pilot projects with conversational interfaces, namely the Alexa skill 'Germany Travel Tips' and the chatbot 'German Castle Adventure'. With the development of new skills, such as for the Amazon Echo Show, the GNTB is using state-of-the-art technology to inspire users of these devices to visit Germany.

Amazon Echo show 'German Brotzeit'

The culinary skill 'German Brotzeit' for the Amazon Echo virtual assistant focuses on authentic regional tradition and has been available in the US since November 2019.

The skill contains 16 speciality bread recipes – one for each federal state – and lots of information about the regions the recipe comes from, plus typical sights and attractions in that region.

'German Brotzeit' is also being adapted for use with the Google Assistant.

The brand strategy

The GNTB showcases Germany as a modern and attractive destination in the international travel market. The two pillars of 'towns, cities & culture' and 'nature & relaxation' are at the heart of its work, and it devises and organises around 200 campaigns based on these pillars in the markets each year.

The GNTB uses the full marketing mix to promote the Destination Germany brand in all its facets. Its cross-media campaigns speak directly to consumers via social media and make the most of online travel companies' high market penetration. Traditional advertising, press work and PR events combine to create an unmistakable market presence vis-à-vis consumers and partners in the international travel industry.

THE CORE BRAND OF DESTINATION GERMANY



Germany is **the no. 1 cultural travel destination** for Europeans, with a **MARKET SHARE OF 12%**

TOWNS, CITIES & CULTURE

According to IPK, of the 183.5 million cultural trips taken by Europeans last year, 21.8 million were to Germany. An interim analysis of the World Travel Monitor data for January to August, carried out by IPK International on behalf of the GNTB, shows that the boom in city trips, in particular, is continuing.

BUSINESS TRAVEL

Despite unfavourable economic conditions, Germany extended its position as the leading business travel destination in the European market in 2019. For example, the number of trips abroad for business reasons climbed 1 per cent across Europe, whereas in Germany it rose by 2 per cent.

Growth in the MICE segment (Meetings/Incentives/Conferences/Events) compensated for the ongoing downward trend in traditional business travel. While growth in **promotable business travel** slowed from 3 per cent to 2 per cent across the European market, Germany recorded a further significant plus. **At 4 per cent, its growth rates** were twice as high as those of the European market and double the previous year's figure.



MATTHIAS SCHULTZE

Managing Director, German Convention Bureau e.V. (GCB)

New GNTB survey on the market potential of 'bleisure' (business and leisure) trips

A survey by IPK International on behalf of the GNTB analysed the market potential of this segment and the challenges for the GNTB arising from it.

Below is a summary of the most important facts:

- Bleisure travel has huge market potential: 45 per cent of global business trips abroad are combined with a holiday/private stay; the bulk of these are in connection with promotable business travel (MICE segment).
- By global comparison, business trips to Germany are less likely to combine work with leisure.
- Germany's main competitors when it comes to bleisure trips are the US overseas and France, Spain, Italy and the UK in Europe.
- The incentive travel segment, in particular, presents opportunities to participate in the growing bleisure market.

"Germany is the global no. 1 for promotable business travel to meetings, incentives, conferences and events. This strong performance is based on Germany's economic and scientific expertise, among other things, and brings with it the responsibility to use fresh ideas to drive forward the digital transformation of the promotable business travel sector. The Future Meeting Space innovation network, initiated by the GCB and the Fraunhofer Institute for Industrial Engineering, addresses the question of what the future of events may look like and how players in Germany's conference and congress sector can take advantage of and actively shape the upcoming challenges."

IPK

16% OF ALL HOLIDAYS BY EUROPEANS have nature as a key element.

Source: GNTB/WTM, IPK International 2019 (share of nature/active holidays to Germany of all holidays)

NATURE & RELAXATION

Diverse scenery and unspoilt nature are just two of the major quality criteria that characterise Destination Germany. In neighbouring countries, which are strong source markets, the GNTB is focusing on themes such as active holidays that also support holiday destinations in Germany's low-lying mountain regions and boost tourism in rural areas. Health-related and medical tourism is in great demand in the emerging markets of Russia and the Arab Gulf States, and is intensively promoted there.

Sustainability

Sustainability and social responsibility are integral elements of forward-looking tourism, and the GNTB's campaigns therefore focus on the quality of tourism offerings in Germany. By showcasing the standards that have been achieved, the GNTB plays its part in boosting Destination Germany's image among the international travel industry.

The GNTB shares its extensive expertise in sustainability matters with its partners in the German inbound tourism industry, thereby broadening the basis for the continuous development of sustainable offerings.

www.germany.travel/sustainability

Three-pillar strategy

KNOWLEDGE MANAGEMENT

Marketing campaigns, press and PR activities, social media, influencers, etc.

Examples of GNTB activities:

- **Sustainability workshop** for members and partners, 3 December 2019 in Frankfurt
- **ETC Working Group on Climate Change Mitigation Participation** in a working group of the European Travel Commission (ETC)
- **GSTC 2019 Global Conference, 4–7 December 2019** GNTB presentation in front of more than 250 sustainability experts from 42 countries

COMMUNICATIONS STRATEGY

Presentations, committee work, workshops, expert networks, product development

Examples of GNTB activities:

- **New 'Sustainable Tourism' online publication** available at www.germany.travel/sustainability
- **Participation in the 19th annual conference of the German Council for Sustainable Development (RNE)** in Berlin on 4 June 2019
- **Interactive online map** at www.germany.travel featuring more than 1,000 certified restaurants, cafés and places to stay

INTERNAL SUSTAINABILITY

As an organisation, the GNTB also pursues a strategy of sustainable development internally.

Examples of GNTB activities:

- **Green Globe organisation:** the GNTB was certified for the seventh successive year in 2020. Since 2014, the GNTB has also been an ECOPROFIT organisation in Frankfurt
- **Going green at the GTM** The event has held the Green Note quality seal since 2018
- **All GNTB business trips offset through** atmosfair



ACCESSIBILITY

Central 'Travel for all' database at www.germany.travel

The 'Travel for all' database has been available in German and English at www.germany.travel in the section 'Travel barrier free' since the middle of March 2019. For the first time, international visitors and partners in the international travel trade have access to a central repository of information on barrier-free tourism facilities and offerings in Destination Germany.

The 'Travel for all' project was funded by the Federal Ministry for Economic Affairs and Energy and developed over several years by the German Seminar for Tourism (DSFT) and the National Coordination Board Tourism for All (NatKo) in collaboration with tourism organisations and associations for the disabled.

Barrier-free Tourism Day

Barrier-free Tourism Day is the established platform for networking, sharing information and discussing the current state of accessible tourism. Around 200 attendees from associations, organisations, the political sphere and the tourism sector met with experts at this annual industry event, which is organised by the GNTB on ITB Friday, to share information and hear about the latest trends and developments.

www.germany.travel/barrierfreetravel



Programme for the 2019 Barrier-free Tourism Day

KNOWLEDGE • ACTION • NETWORKING

Knowledge transfer: partnership in practice

NEW EVENT FORMAT: GNTB MEMBERS MEET AT VR HEADQUARTERS IN HAMBURG

The GNTB invited its members to the first exclusive workshop at Virtual Reality Headquarters in Hamburg's historical Speicherstadt warehouse district on 16 April 2019.

Jonas Rothe, founder and CEO of Timeride, gave the keynote speech on the topic of immersive technologies

in the tourism industry. Timeride creates journeys back in time to European cities' past, where the audience is immersed in the hustle and bustle of times gone by through VR glasses and haptic feedback systems.

Experts from Hamburg's start-up scene discussed different perspectives

on VR as a tool and VR development for tourism.

The GNTB presented the development, implementation and use of digital applications in its marketing portfolio.



Annual press conference in March 2019, Sofia (Bulgaria)

“Germany has made a huge leap from 15th to third in the list of most popular holiday destinations. That is the reward for the creative, ongoing and active partnership between the GNTB and the members of the USTOA.”

Terry Dale, CEO of the United States Tour Operators Association (USTOA), praising the GNTB's commitment to the partnership

US ADVISORY BOARD WORKSHOP

German-American partnership today and tomorrow

The GNTB's US Advisory Board Workshop for top representatives of the US travel industry was held in Berlin in October. It provided around 80 delegates from German travel companies and organisations with an opportunity to exchange views with US managers in TED talks, panels and one-on-one discussions on the topic of supply and demand from an American perspective.

There were presentations on current trends and market developments from Ted Sullivan, Resort & Destination Analytics VP at ADARA, and Steven Paganelli, Head of Destination Marketing for the Americas at TripAdvisor, among others.

GNTB KNOWLEDGE DAYS

Core topics of the two-day workshop on 17 and 18 June 2019 in Frankfurt:

- Sustainable travel for the Scandinavian markets
- Micro-influencers, using the source markets in southern Europe as an example
- KPIs for monitoring the performance of OTC campaigns.

120 representatives of the German travel industry took part in the 2019 Knowledge Days. Keynote speeches were made by leading digital players such as Alibaba, Amazon Pay and Travel Audience, while delegates from Facebook, YouTube and Tencent/WeChat took part in the panel discussions.



US Advisory Board Workshop, 28 October 2019, Berlin



China Tourism Industry Meet Up, 18–20 November 2019, Hangzhou (China)

GNTB SUSTAINABILITY WORKSHOP ON 3 DECEMBER IN FRANKFURT

Sustainability is a key element of Destination Germany's core brand. The GNTB has extensive expertise in developing sustainable tourism products and targeted international marketing, as well as in bringing together leading players in this field. The sustainability workshop format gives GNTB members and partners access to this expertise and the network.

Keynote speaker Professor Andreas Matzarakis from the German Meteorological Service discussed the challenges and opportunities that climate change presents to inbound tourism to Germany.

Representatives from over 30 tourism companies and destination management organisations learned about the GNTB's activities to position Germany as a sustainable travel destination, and discussed best practice in sustainable tourism in Germany.

MARKETING COMMITTEE

The sharing economy was the topic of the marketing committee meeting at Frankfurt's Radisson Blue Hotel on 15 May 2019.

Dr Heidi Fritzsche, Senior Consultant at IPK International, explained at length the importance of 'sharing accommodation' in connection with outbound travel.

The lecture was complemented by workshops held by sector experts, such as Alexander Schwarz, General Manager of Airbnb Germany, who explored the topic under the heading 'From air mattress to end-to-end travel platform'. Nico Gabriel, Managing Director of the Sixt X division at Sixt SE, led a 'sharing transport' session.



Nico Gabriel, Managing Director of the Sixt X division at Sixt SE, talking 'sharing economy' at the marketing committee, 15 May 2019, Frankfurt

DESTINATION DAYS

#1: Japan (12 May 2019 during the GTM in Wiesbaden)

At Destination Day Japan, over 30 participants from the German travel industry learned about current trends and developments in the source market of Japan. The focus was on the high-potential topic of luxury. Travellers from Japan are particularly interested in unique places and exclusive and exceptional travel experiences, as well as in tradition, culture and food and drink. In view of this, the GNTB office in Tokyo promotes Germany as a destination for luxury holidays.

#2: Balkans and Slovenia (webinar on 12 September 2019)

According to the GNTB's forecast for 2030, the growth region of the Balkans and Slovenia has huge potential for inbound tourism to Germany. The webinar gave partners from Germany's tourism industry a broad insight into current developments and market trends. Campaigns designed specifically for the booming markets of Bulgaria, Bosnia and Herzegovina, Croatia, Montenegro, Romania, Serbia and Slovenia were introduced alongside relevant data and facts.

GENERAL MEETING ON 7 NOVEMBER 2019

The GNTB used its general meeting to present members with information on its activities and on the situation in inbound tourism to Germany, and to provide an insight into future developments and challenges.

Zhaohui Li, Head of GNTB China, explored 'China as a use case for the future of the customer journey' via video.

Dr Andreas Becker, Head of Strategy at ioki, a subsidiary of Deutsche Bahn specialising in intelligent on-demand transport and self-driving cars, held a talk entitled 'Future Mobility Insights: Data driven, digital, seamless, driverless'.

Karl Wehner, Managing Director of Alibaba Germany, provided insights into the digital world in China and Europe as part of a deep dive.

The GNTB showcases Destination Germany at international fairs and in workshops

USA-GERMANY MARKET PLACE

This sales event, held for the first time in 2019, is run along the lines of the GTM: 20 German partners presented their products to 60 travel agents and media representatives at the Porsche Experience Center in Los Angeles.

The platform also offered opportunities for one-on-one meetings with representatives of US tour operators. Presentations included the 'Germany by Night' digital AR app and the 'Palaces, parks and gardens' mixed reality app.

Keynote speaker Craig Compagnone, COO of MMGY, a marketing agency specialising in tourism, painted a 'Portrait of the American Traveler'.

INDUSTRY MEETUP IN HANGZHOU FOR PARTNERS IN THE GERMAN AND CHINESE TRAVEL INDUSTRY

20 partners from Germany used the communication platform as a means to talk directly to 148 travel companies and 15 media representatives from China.

The focus of the event, held from 18 to 20 November 2019 in Hangzhou, was on the development of products that meet the specific requirements of this future growth market. The event format included excursions to companies that use the latest digital technologies, including Alibaba/Alipay, Fliggy and a 'self-service future hotel', as well as seminars with representatives of the Chinese travel industry.

During the two-day workshop, German vendors from inbound tourism, outlets and the hotel and transport sectors – together with local and regional tourism organisations – showcased their products.

ITB BERLIN 2019: DIGITAL APPLICATIONS LIVE AT THE GNTB STAND

The GNTB used a virtual reality zone at its stand to demonstrate the various ways in which Destination Germany can be experienced digitally. The presentations are already being used in the GNTB's marketing portfolio.

- Virtual replica of the office of Bauhaus founder Walter Gropius
- 360° video 'Discover Germany by bike'
- 360° video 'Beethoven 2020'
- 360° video 'Gondola ride over Germany'
- Mixed reality app 'Palaces, parks and gardens'

The way in which the GNTB is using the possibilities of new digital technologies met with strong interest from business partners and other attendees.

Once again in 2019, the GNTB's highlight at the ITB fair was the dialogue with parliamentarians and employees of the German Bundestag and the Federal Ministry for Economic Affairs and Energy during the parliamentary breakfast.

The traditional parliamentary evening put on by the GNTB and Messe Berlin gave decision-makers in politics, governing bodies and the travel trade an opportunity to network.

GTM 2019 IN WIESBADEN

The GNTB's 45th GTM Germany Travel Mart™ added another chapter to the success story of the most important sales event for Germany's inbound tourism industry. The GTM is the main platform for key accounts from the international travel trade and partners in Germany's tourism industry to meet, maintain contacts and do business.

From 12 to 14 May 2019, 533 international buyers, journalists and GNTB experts from 51 countries attended the 45th Germany Travel Mart™.

The GNTB and its partners offered international visitors an educational programme exploring the latest trends, developments and tourism products in Germany.

During the two-day workshop at the RheinMain Congress-Center, 455 delegates from 280 German companies in inbound tourism and the hotel and transport sectors – together with local and regional tourism organisations – showcased the variety and quality of Germany's inbound tourism to an international audience of trade professionals. Around 18,000 meetings were arranged via the online networking tool.

The feedback was positive, with 98 per cent of participants 'satisfied' or 'very satisfied' with the event format.



VR zone at the GNTB's stand during the ITB 2019

Trade fairs and workshops in 2020

As a partner of the German tourism sector, the GNTB has over 5,000 long-standing contacts in the international travel industry, including global online travel companies and key account tour operators in the source markets. By participating in leading international trade fairs and organising its own workshops and roadshows, the GNTB continually maintains, updates and expands these networks.

T = Trade fair/exhibition W = Workshop R = Roadshow

Germany Rostock W GTM Germany Travel Mart™ postponed to 2021

REGIONAL MANAGEMENT NORTH EAST EUROPE

Russia	Moscow	W	Tourism in Germany Workshop	17 Mar 2020
Russia	Moscow	W	'Health. Made in Germany' Workshop	3 Sep 2020
Denmark	Aarhus, Copenhagen	W	North Europe Workshop	28–29 Oct 2020
Poland	Warsaw	W	Trade Workshop	5 Nov 2020

REGIONAL MANAGEMENT NORTH WEST EUROPE

United Kingdom	London	W	UK Speed Networking	2 Jul 2020
Netherlands	Amsterdam	W	ReisMarkt Duitsland	17 Nov 2020
Belgium	Brussels	W	Germany Workshop	18 Nov 2020

REGIONAL MANAGEMENT SOUTH EAST EUROPE

Balkans	Bucharest and Belgrade	R	Balkans Roadshow	4–5 Feb 2020
Balkans	Timisoara, Sibiu, Cluj	R	Romania Roadshow	September 2020
Austria	Vienna, Graz and Salzburg	R	Austria Roadshow	21–23 Sep 2020

REGIONAL MANAGEMENT SOUTH WEST EUROPE

Italy	Milan	W	Germany Workshop 'Germania. Destinazione vacanze'	10 Feb 2020
Switzerland	Zurich	W	Interactive Germany Workshop	25 Jun 2020
France	Strasbourg, Lyon and Paris	R	France Roadshow	13–15 Oct 2020
Spain	Madrid and Barcelona	W	'Meet Germany' Workshop	14–15 Oct 2020
France	Cannes	M	ILTM Cannes	7–10 Dec 2020

REGIONAL MANAGEMENT AMERICAS/ISRAEL

Latin America	Mexico, São Paulo and Buenos Aires	R	Latin America Roadshow	31 Aug–3 Sep 2020
US/Canada	Toronto, Minneapolis and Chicago	R	DG Marketplace & Roadshow	5–8 Oct 2020
US	Stuttgart	W	US Advisory Board Workshop	20 Oct 2020

REGIONAL MANAGEMENT ASIA/AUSTRALIA

India	Mumbai	M	ITB India	15–17 Apr 2020
Arab Gulf States	Dubai	M/W	Arabian Travel Market & Marhaba Europe Workshop	17–22 Apr 2020
Arab Gulf States	Saudi Arabia	R	Dallal fi Almanian – Gulf States Roadshow	Nov 2020
India	Goa	R	Industry Meet Up India	6–11 Sep 2020
South East Asia	Jakarta, Singapore, Kuala Lumpur, Bangkok	R	ASEAN Roadshow	12–16 Oct 2020
Japan	Tokyo	R	'Germany as a Luxury Destination' Roadshow	26–28 Oct 2020
China	Hangzhou	W	China Tourism Industry Meet Up	15–19 Nov 2020

Subject to change without notice

The hotel and restaurant trade offers an attractive package for inbound tourism

“Digitalisation and personal service are by no means mutually exclusive.”

Every digital advance creates major opportunities for our sector. We welcome these developments and have introduced a whole range of measures to support our hotels. Even though, as a group of individual establishments and hoteliers, personal contact is very important to us and the desire to fulfil our customers’ wishes is at the heart of everything we do, digitalisation and personal service are by no means mutually exclusive. Quite the opposite in fact: the more we can digitalise and automate repetitive processes and routine tasks, the more time we will free up for direct customer contact and for taking care of our guests.



CARMEN DÜCKER
CEO, BWH Hotel Group
Central Europe GmbH

“As an innovative company, we are helping to shape the future of the hotel industry.”



THOMAS WILLMS
CEO, Deutsche Hospitality

Digital touchpoints affect the way guests experience our brands. As an innovative company, we are helping to shape the future of the hotel industry. The digital transformation is the central theme. We rely on numerous digital services: our chat function offers a quick and interactive means for people to book their stay, while apps enable them to check in digitally if they choose. Because the guest experience begins even before arrival, we use smart digital solutions to present guests with offers tailored to their individual interests long before they get here. Other services help them to plan what they will do during their stay and give us even more time to personally interact with them.

For hoteliers, it is more important than ever to assist guests with digital solutions every step of the way. This begins long before arrival, with the careful targeting of offers, then continues through booking and arrival and throughout the guest’s stay, right up to departure and review, when the circle closes. Hoteliers wanting to



THOMAS EDELKAMP
CEO at Romantik
Hotels & Restaurants AG

“For hoteliers, it is more important than ever to assist guests with digital solutions every step of the way.”

control their own marketing cannot leave the digital aspects to third parties. Offering guests more than they expect in terms of technology is also a form of hospitality. But when it comes to a warm welcome we are very much back in analogue territory. There’s no app or widget for that yet, thank goodness!

With warm hospitality and personal service. Direct contact with our guests is still very important to us, but at Maritim we also keep a very close eye on digital developments that make our work easier and enhance the comfort of our guests. In fact we are currently implementing new software solutions in key areas of all our hotels.



MARK SPIVEY
International Sales Director,
Maritim Hotelgesellschaft mbH

We are pioneers in terms of contact with our Chinese guests: in 2018, we were the first German hotel chain outside China to launch our own WeChat mini-program in partnership with Qyer.com, the largest Chinese travel platform, and Tencent, its largest internet company. Chinese tourists and business travellers in our hotels appreciate the added value provided by this service, with its wealth of useful local information.

“In 2018, Maritim launched its own WeChat mini-programme – the first German hotel chain outside China to do so.”

The digital revolution in hotels. How will you be greeting the guests of tomorrow?

“Our Ringhotels use digital technologies very specifically wherever they make it possible for us to devote more time to our guests and their individual needs.”

As a ‘high touch’ brand – human, authentic and with a strong focus on personal contact with our guests – it is crucial for Ringhotels to use this USP to mark itself out from the competition and, in particular, from the standardised brands. This becomes even more pertinent in an age of ever faster digitalisation.

This does not mean that we have closed our minds to technical progress – far from it. Our Ringhotels use digital technologies very specifically wherever they make it possible for us to devote more time to our guests and their individual needs.



SUSANNE WEISS
CEO, Ringhotels e.V.



OTTO LINDNER
Chairman of the German Hotel Association (IHA)

Rapid digitalisation is connecting the world, accelerating processes and opening up new opportunities, especially for the hotel industry. At the same time, people are more important than ever in our sector.

“The digital revolution is enabling hotel staff to spend more social time with guests.”

The hotel industry is one of Germany’s most digitalised sectors. Digital tools have accelerated and simplified processes, from online booking and online check-in to digital keys, automated management of hotel facilities and mobile payments.

More than 60 per cent of hotel bookings are already made via digital channels. And we are delighted that the digital registration form is now a reality. At the same time, the digital revolution is enabling hotel staff to spend more social time with guests. There is more time for things like recommending local restaurants or giving tips for a special souvenir if administrative matters such as check-in are handled digitally. But one thing will never change: no technology in the world can replace genuine hospitality, individual service and personal attentiveness to guests.

“Guests expect the right product or service to be available at the right time.”

The digital transformation is revolutionising the hotel and catering sector. Innovative technologies such as online table reservations, software-supported payment systems and recruitment apps offer new marketing opportunities and greater flexibility. Guests expect the right product or service to be available at the right time. The importance of internet portals is growing, and hotels and restaurants therefore need to have a presence on all channels. This requires modern thinking and practices, as well as a business and regulatory environment that is fit for the future. Ensuring a level playing field is particularly important. It is, of course, our businesses – not the online portals, search engines or internet giants – that own the product that will deliver genuine added value and which bear responsibility for their co-workers and companies. We have no doubt that in our particularly service-oriented sector, the linchpin is and will remain personal contact with guests. The things that really matter are good hospitality, pleasurable experiences in an increasingly virtual world, and excellent service delivered by well trained and highly skilled staff.



GUIDO ZÖLICK
President of the German Hotel and Restaurant Association



Evolving transport options for inbound tourism



PROFESSOR SABINA JESCHKE
Member of the Management Board for Digitalisation and Technology at Deutsche Bahn AG

“We need to assess innovative technologies according to their relevance to our business and our customers.”

As a technology company and provider of transport services, we want to progressively make the rail system ‘smart’. This requires us to master our technology: we don’t have to build our own trains but we should in principle be able to. And we need to assess innovative technologies according to their relevance to our business and our customers. This is the only way to increase the capacity and the appeal of rail and at the same time develop new, disruptive business models and new offerings for sustainable mobility, both on and off rail. Promoting both equally – this is our commitment at Deutsche Bahn with regard to the symbiosis of digitalisation and technology.

“As an airport operator, organising transport solutions is our core competence.”

Our wealth and prosperity is based to a large extent on the division of labour in the economy, including between countries. This demands a high degree of mobility and thus advanced, safe and sustainable transport options and concepts. As an airport operator, organising transport solutions is our core competence – whether that be the latest aircraft on the aprons or, in future, flying taxis. Whether it be alternative means of propulsion for the vehicle fleet or, in future, (semi-)autonomous driving. This is how we offer passengers the best transport solutions and an outstanding travel experience.



DR STEFAN SCHULTE
Chief Executive Officer, Fraport AG



ANDREAS VON PUTTKAMER
Head of the Aviation Division, Flughafen München GmbH

“Munich airport is developing into a modern transport hub.”

Munich airport is developing into a modern transport hub. Audi operates Europe’s largest electric recharging station on the airport site, providing electricity it generates itself through solar cells. Other mobility concepts such as car sharing and innovative shuttle services are being massively extended on the airport site. The strong growth of

the past year in our core mobility model, air travel, continues unabated at Munich airport, with an additional 1.7 million passengers taking total passenger numbers to an all-time high of 48 million. For 2020 we are forecasting a further 3 per cent growth, bucking the trend for Germany as a whole.

Bikes are the answer to congested cities, clogged roads and poor air quality. New mobility models require safe cycle infrastructure, a well-developed public transport network and digital services that facilitate intermodal connectedness. The ADFC is advocating these measures both for general cycling and for cycling tourism. The opportunities

“Bikes are the answer to congested cities, clogged roads and poor air quality.”



FRANK HOFMANN
Deputy Chairman of the German Cyclists’ Federation (ADFC)

afforded by the new climate legislation now have to be acted upon at local level. Plans include an expansion of Germany’s cycle path network that currently comprises twelve national, highly attractive cycle routes. These premium routes were conceived for tourists but are also extremely interesting for commuters. A triple-win for health, the environment and the economy!

How are you adapting to the development of new transport solutions?



HEIKE BIRLENBACH
Senior Vice President Sales of Lufthansa Network Airlines and Chief Commercial Officer of Hub Frankfurt

“The Lufthansa Group Network Airlines is moving forward on its digitalisation journey in sales, product development and service.”

The Lufthansa Group Network Airlines is moving forward on its digitalisation journey in sales, product development and service. The sales function of the future will involve managing countless sales channels. We are therefore working with a number of tech giants, IT specialists and other experts with the aim of utilising the opportunities of digitalisation to enhance the individual customer experience along the entire travel value chain. We hope to take our sales partners along with us on this journey.



BENEDIKT ESSER
President of the International Coach Tourism Federation (RDA)

It is important to take a holistic view of the transport solutions of tomorrow. Ensuring it is possible to move seamlessly between transport types will be of critical importance, especially connecting one climate-friendly journey to another. In view of the goals of the national tourism strategy, we propose setting up new transport

“It is important to take a holistic view of the transport solutions of tomorrow.”

intersections, especially in the urban centres and major cities – so-called city hubs. We envisage these as transport terminals with shops and restaurants. Travellers should feel comfortable there as they wait for their connecting coach, train or bus.

“Special fleets also have emission-free or low-emission vehicles.”

Hertz recently launched its innovative car rental scheme ‘My Hertz Weekend’. An affordable subscription service gives customers access to a rental car at weekends for a fixed monthly fee – without any need to book. Hertz is thereby tapping into the trend of being able to use cars flexibly without having to actually own one. It also offers a car sharing service. Hertz 24/7 is a sustainable mobility solution for non-business customers at furniture stores and DIY centres, and also includes a corporate car sharing option for businesses. Special fleets also have emission-free or low-emission vehicles.



ALIDA SCHOLTZ
Managing Director of Hertz Germany

People’s travel habits are changing and as North Rhine-Westphalia’s largest airport and multimodal transport hub, we are proactively supporting this development. Car sharing, electric vehicles, self-driving cars, flying taxis– we see huge potential

“We see huge potential in the intelligent networking of transport operators.”

in the intelligent networking of transport operators, because our customers want sustainable and flexible services to get them from door to door. That’s why we promote innovative ideas that put global trends into practice. Partnerships are important here. Digitalisation gives us an opportunity to stay close to the customer at every stage of the process. For airlines, the most important lever in terms of reducing environmental impact lies in the development of alternative aircraft fuels. The effort we are putting into this is worth it, because ultimately, an efficient transport infrastructure is the backbone of our global society and engine of our prosperity.



THOMAS SCHNALKE
Chief Executive Officer
Flughafen Düsseldorf GmbH



Challenges and opportunities for inbound tourism to Germany

“This is because the hybrid customer expects packages to be customisable in all possible booking channels.”

The holiday home rental market grew again in 2019, as did the camping and motorhome markets. The trend towards city breaks, short breaks and weekend trips continues unabated. The events market (musicals, theatre and concerts) is also still growing. These are forms of travel that can currently only be booked via a small number of major websites or directly from the provider. The digital configuration of these domestic travel products and activities in the booking systems of traditional travel agencies in Germany and abroad offers additional growth within the inbound business. This is because the hybrid customer expects packages to be customisable in all possible booking channels.



DR MICHAEL FRENZEL
President of the Federal Association of the German Tourism Industry (BTW)

“We are calling for a level playing field between sharing platforms and traditional businesses offering comparable products and services.”

Digital marketing and sales channels, new forms of payment, customised offers based on collected data: all this helps companies to win new target groups and additional customers, especially from abroad. However, one central principle remains unchanged. All businesses must have a fair chance to benefit from digitalisation. We are therefore calling for a level playing field between sharing platforms and traditional businesses offering comparable products and services. We want to see transparency and clear ground rules for booking and review websites, both for customers and vendors. And we need comprehensive high-speed broadband coverage, including in rural areas, so that providers of tourism services in those areas are not excluded from an increasingly digitalised world of work and leisure.



TORSTEN HAASE
Member of the Management Board for Sales, Marketing & Operations, ERGO Reiseversicherung AG

A new record was set by Europa-Park in 2019 when the number of visitors topped 5.7 million. The new Krønāsår hotel opened, along with the massive new Rulantica indoor water park containing 25 exciting attractions. With two parks, six themed hotels and the Confertainment Center, Germany's biggest theme park is attracting more and more international attention. To remain globally competitive as a tourist destination, it is important that we continue to push ahead with the process of digitalisation and build the necessary infrastructure.

“To remain globally competitive as a tourist destination, it is important that we continue to push ahead with the process of digitalisation.”



DR.-ING. H.C. ROLAND MACK
Managing Partner of Europa-Park GmbH & Co Mack KG



MONIKA REULE
Managing Director of the German Wine Institute (DWI)

“We believe that the digital revolution in communications will bring enormous opportunities for inbound tourism.”

We believe that the digital revolution in communications will bring enormous opportunities for inbound tourism in Germany. For example, for some years now we have been seeing growing interest in themes based around wine tourism on our website. The integration of multimedia content may make these even more attractive to visitors. Additional opportunities are provided by the collaboration with influencers, who act as opinion formers on social media. The challenge for the future will be to hold the attention of our target groups as the volume of online information continues to grow.

What successes, challenges and opportunities do you think the digital revolution presents for inbound tourism in Germany?

“Every player brings different possibilities and insights to the table.”

In 2019, the German Tourism Association and the consultancy firm BTE Tourismus- und Regionalberatung conducted a survey on the progress of digitalisation in Germany's regions. Some of the results were not very encouraging, and yet not really surprising. In summary: there are still huge differences, especially between national, regional and local levels. At the same time, every player brings different possibilities and insights to the table. That creates scope for coordinated action to exploit the opportunities opened up by the digital transformation and to overcome its challenges.



REINHARD MEYER
President of the German Tourism Association (DTV)



DR STEFAN HOFFMANN
Managing Director, Outletcity Metzingen

“Online or offline is a thing of the past – the future is about providing customers with customised digital support for their shopping experience.”

Many of our customers shop both at the outlet village in Metzingen and in our online shop. Well over 50 per cent of the purchases are planned online in advance. That’s why we have linked all touchpoints seamlessly together. ‘Online or offline’ is a thing of the past – the future is about providing customers with customised digital support for their shopping experience.

We have already implemented numerous digitalisation measures including an app, a customer club and the large-scale rollout of powerful Wi-Fi. This is particularly valued by international visitors. Going forward, we will continue to expand our digital services and add greater emotion to the shopping experience, and thereby enhance the quality of the time people spend with us. Bricks-and-mortar and online stores can thus be of mutual benefit globally. This approach is already paying off: inbound tourism from our source markets rose by 12 per cent in 2019 compared to 2018.

“AR and VR enable us to bring hidden sites to light, and to recreate lost treasures.”

#WirsindWelterbe The 46 German UNESCO World Heritage sites are unique flagship attractions that strengthen Germany’s positioning as a cultural travel destination. We work with the German National Tourist Board to promote the sites in markets all over the world. Digital technologies assist us in this and open up new options for promoting our cultural and natural heritage, teaching people about it and leveraging its potential. AR and VR enable us to bring hidden sites to light, and to recreate lost treasures. The German World Heritage sites will take on the challenges of big data, content production and the digital revolution in order to continue making the most of the opportunities afforded by digitalisation.



CLAUDIA SCHWARZ
Chairwoman of the German UNESCO World Heritage Sites Association

“Large-scale expansion of the high-speed digital infrastructure is essential for the tourism industry.”

The economic situation also affected the German tourism industry in 2019. Although growth slowed, Germany remains a popular travel destination thanks to the sterling work of the GNTB, particularly in the area of new digital technologies. The latest business survey shows that the hospitality industry has no cause for concern as regards international demand.



DIRK BINDING
Head of Department for the Digital Economy, Infrastructure and Regional Policy (DIR), Association of German Chambers of Industry and Commerce (DIHK)

However, we still have a long way to go in terms of digitalisation. Large-scale expansion of the high-speed digital infrastructure is essential for the tourism industry. This applies both to the fibre-optic network and the mobile network. There is an urgent need for action in this area. We also have to address changing visitor requirements with smart tourism strategies. The GNTB is doing an excellent job in driving things forward in this area, too.

“As the digital revolution continues, the German regions are discovering travel agencies as a sales channel.”

Germany is a great place for a holiday. Germans who holiday at home mostly organise their own travel, but the packages put together by tour operators have increased significantly in popularity in recent years. The inclusive package tour has its place in the mix, with good prospects for growth, and is increasingly enriching hotel stays with attractive services. And as the digital revolution continues, the German regions are discovering travel agencies as a sales channel. Special technological solutions enable agencies to access the offers created by the destinations directly and pass on information to their customers. This increases the variety of products available in travel agencies – to the benefit of all concerned.



NORBERT FIEBIG
President of the German Travel Association (DRV)



Arabian Travel Market ATM, 28 April – 1 May 2019, Dubai

GNTB CAMPAIGNS

INSPIRING FROM ALL ANGLES

Drawing on data from market research and benchmark analyses, the GNTB develops more than 200 campaigns a year to promote its core brand.

Each year, the communication of the brand is rounded off by new themes that highlight specific events and special occasions, and which raise awareness of lesser-known facets of Destination Germany.

2019 CAMPAIGN

100 years of Bauhaus

The centenary of the founding of the legendary Bauhaus in Weimar was the theme of a global GNTB campaign in 2019. Together with its partners, the Bauhaus 100 coordinating office and the regional marketing organisations, the GNTB organised a range of activities to promote this important event for cultural tourism. The campaign had a big impact in all the countries where it was used.

457 ACTIVITIES IN **31** MARKETS
36 PRESS CONFERENCES **132** EVENTS



2nd Incoming & Brand Summit, 24–26 October 2018, Weimar

The GNTB's **2nd Incoming and Brand Summit** kicked off the campaign at the end of October 2018 and sought to position the theme internationally before the start of the anniversary year. International experts came to Weimar for a three-day conference to discuss various aspects of people's response to the Bauhaus movement with over 100 media representatives and influencers from 20 countries.

Marketing focused on the digital presentation of the theme

A digital replica of the iconic director's office designed by Walter Gropius in Weimar, that provided a lifelike impression of Bauhaus design, was used as a virtual reality project at trade and media events around the world.

An animated video explored the rich diversity of the Bauhaus legacy in the fields of design, architecture, arts and crafts. It also presented the main Bauhaus sites in Weimar, Dessau and Berlin as well as the many other Bauhaus-related attractions that are found elsewhere in Germany. The video was viewed more than 5.36 million times on the GNTB's YouTube channel.

6 INSTAGRAM STORIES WITH **553,000** IMPRESSIONS

The landing page (www.germany.travel/bauhaus) conveyed the campaign's core messages in German, English and French.

The GNTB used face filters on Facebook and Instagram for the first time. More than 2.3 million people have seen the various Bauhaus filters in action, and over 100,000 of them wanted to try them out and capture the perfect Bauhaus moment.

For the Great Big Story format, GNTB media partner CNN produced four films on the subjects of furniture design, ballet, fashion and architecture.

The videos were shown on various channels across the Turner network and had 2.6 million views. The 'Ballet a la Bauhaus' video was the best performing video in CNN's entire Great Big Stories series.



1,300
FACEBOOK POSTS

29 million
REACH



TINY [BAU]HAUS event and exhibition at Het Nieuwe Instituut in Rotterdam, 11 April–5 May 2019

The GNTB has been touring Europe with **TINY (BAU)HAUS** since March. Interactive image installations and digital applications showed how travellers can experience the Bauhaus in Germany today.

The exhibition was set up at busy locations, major public events and press events to promote Germany as a destination for cultural travel. The tour was supported by a cross-media campaign that used the hashtag **#CelebratingBauhaus**.

STATIONS IN 9 MAJOR EUROPEAN CITIES

Paris, Rotterdam, Barcelona, Marseille, Vienna, Prague, Budapest, Belgrade and Copenhagen

Innovative and sustainable: **3D printing** FROM RECYCLABLE PLASTIC

2019 CAMPAIGN

30 years since the fall of the Berlin Wall

The global campaign ‘Destination Germany – 30 years after the fall of the Berlin Wall’ was based on a representative overview of Germany’s tourism offering that has evolved rapidly over the past 30 years and is still continuing to grow in popularity among international tourists. The GNTB implemented the campaign in close collaboration with the HanseMerkur insurance group.



Instagram posts tagged with #Germany30reunified



Key elements of the campaign included live reporting by 20 influencers from ten major source markets for inbound tourism to Germany. On a number of different routes through all 16 federal states and on photo walks with local Igers (Instagrammers), they showed how reunified Germany has changed as a travel destination over the past 30 years.

The content they generated was published with the hashtags #Germany30reunified, #HanseMerkur and #HandinHand on the GNTB’s Instagram feed and other social media platforms, on the www.germany.travel website, under the influencers’ own accounts and in blogs.

220 POSTS on social media storywalls with more than
200,000 VIEWS AND
185,000 INTERACTIONS

TOTAL REACH OF
2 million



HanseMerkur
#HanseMerkur
#HandinHand

In September, the GNTB also invited leading journalists from traditional media around the world to three press highlight tours through eastern Germany and Berlin. The tours culminated in a joint PR event in Berlin on 20 September.

34 JOURNALISTS FROM **22** COUNTRIES

Held at Academie Lounge on Potsdamer Platz, the PR event focused on various perspectives from contemporary witnesses and the current tourism offering related to the anniversary of the fall of the Wall.

130 million POTENTIAL REACH



PR event on ‘30 years after the fall of the Berlin Wall’, November 2019, Bosnia and Herzegovina

2019 CAMPAIGN

#GermanSummerStories

In spring 2019, the GNTB launched its cross-media campaign ‘German Summer Cities’ with five clusters: Urban city, Romantic Germany, Holidays by the water, Places of interest, and Art & culture.

Events in 14 key markets in Europe, the US, China and the United Arab Emirates provided a taste of the lighter side of life in Germany’s urban centres.

Instagram, generating 310 million impressions, including 59 million multiplatform views. More than 460,000 clicks led directly to the websites of the GNTB’s partners.

The campaign generated the greatest reach on social media: there were more than 2,900 posts on YouTube, Facebook and

The video for the campaign became a viral hit with more than ten million views and four international awards.



Silent disco at the GSC stand at the Danube Island Festival in Vienna in June 2019

More than **170 million** PAGE IMPRESSIONS on the OTC platforms

More than 50 partners took part, booking over 100 marketing packages and using the campaign to promote their products in 30 countries.

The campaign promoted bookable travel offers in a range of markets via leading online travel companies including Expedia, Ctrip (China) and Aviasales (Russia).

More than **170,000** PARTICIPANTS at the international events



GSC event, March 2019, Dubai



GSC event, June 2019, Krakow



VR zone at the GNTB B2B event, May 2019, Madrid



GSC stand at Züri Fäscht, July 2019, Zurich

Simply Inspiring: Marketing the core Destination Germany brand

MACROREGIONAL LIVE ART AND DIGITAL CAMPAIGN IN NORTH-WEST EUROPE

Colourful, creative and international: Colours of Germany

The GNTB launched a macro-regional live art and digital campaign in the UK, the Netherlands and Belgium, key source markets for inbound tourism to Germany.

One aspect that made this campaign special was the inclusion of static art (photography, graphic design, illustration) through collaboration with the world's largest creative community, 'Talent House'. An international panel of judges selected a number of artworks from all the creations submitted and these were featured prominently in the campaign.

In partnership with the online travel company Skyscanner, the campaign targeted potential visitors who were still at the stage of looking for inspiration. Other partners included Lufthansa and the federal states of Bavaria, Saarland and Bremen.

The central medium was a landing page with an interactive mosaic of colours on various themes such as cities, nature, castles & palaces and food & drink. These took the user to colour-themed travel guides featuring interactive maps and bookable packages. A video – 'Germany in full colours' – was produced especially for the campaign for use as a teaser.

REACH
570,965

ENGAGEMENT
18,836

734 SUBMISSIONS
FROM **57** COUNTRIES



48,746 PAGE VIEWS

MACROREGIONAL OTC CAMPAIGN IN SOUTH-WEST EUROPE

Deutsche Opernkonzert alliance of eleven opera houses for the no. 1 cultural destination among Europeans

For this OTC campaign in France, Italy, Spain and Switzerland, GNTB Paris placed high-quality text and video content in a flash sale that featured on all channels of the OTC partner Voyage Privé, a market leader in premium themed travel. Packages from European opera travel specialist Eurydice Opéra were also promoted and sold.

1.34 million

PAGE IMPRESSIONS for placement among the top ten offers on the Voyage Privé website

27,000 VISITORS

to the travel offers on the booking site

6.1 million

collaboration partner **NEWSLETTERS**



DIGITAL CAMPAIGN IN PARTNERSHIP WITH T-MOBILE IN POLAND

Promoting Germany for young people

In collaboration with T-Mobile, one of the largest telecom providers in Poland, the GNTB used the enormous potential of the data held by mobile-phone providers on the activities and behaviour profiles of their customers to actively target potential visitors to Germany. T-Mobile sent out text messages while influencers posted relevant content on Instagram.

318,000

TEXTS linking to the landing page

270,000

MMS MESSAGES containing a photo and link to the landing page

3 million

REACH on Instagram with **216,000 INTERACTIONS**



Instagram post by Polish influencer mademoisellepoisson

Exploring Germany the green way – with rail campaigns in neighbouring countries

SWITZERLAND

'Get onboard and explore' in partnership with Rheinalp (DB/SBB)

The successful cross-media campaign to promote holidays by train in Germany continued in 2019. The campaign ran twice, in April/May and then again in October/November. A special ticket in these periods encouraged Swiss holidaymakers to book a train trip to Germany. The project by Rheinalp (DB/SBB) and the GNTB was also supported by Nightjet and ten German partners.



Promotional video for the campaign with Rheinalp

1.4 million
CONTACTS via the SBB newsletter

150,000
VISITORS to the microsite

FACEBOOK ADS with
2.8 million
VIEWS

GNTB FACEBOOK POSTS with
12,000
IMPRESSIONS

AUSTRIA

'Carry on dreaming' campaign focused on the 0049 country code for Germany

With the relaunch of the successful Sparschiene campaign in Austria, the GNTB is increasing its use of influencers and is communicating via innovative new touchpoints.

16 Austrian influencers took inspiration trips in Germany between May and November. These were made into 16 episodes targeted at the younger generation.

REACH

17 million

2.7 million
VIDEO VIEWS

Content relevant to the target group was also featured on external websites, outdoor advertising was placed in the form of backlit posters in Vienna, Salzburg and Innsbruck, and the communication channels of the Austrian Federal Railways (ÖBB) were utilised: these included the Germany page oebb.at, railaxed.at and the customer magazine railaxed.



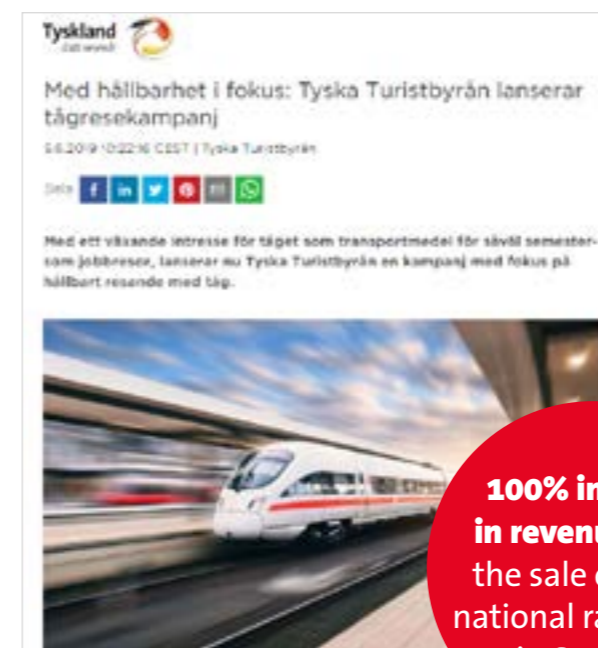
One of the posters for the 2019 Sparschiene campaign

SWEDEN

Undiscovered pearls in Germany

Germany is the second most popular foreign destination for Swedes. In the modal split, however, rail has so far been lagging well behind with a market share of just 2 per cent. The GNTB campaign was designed to support Germany's positioning as an eco-friendly short-haul destination that is easy to reach and offers sustainable products and services.

The campaign was run in partnership with the tourism marketing organisations of Mecklenburg-Western Pomerania, the Spree Forest, Hannover, Bremen and Hamburg, Deutsche Bahn, three Swedish rail companies (Silverrail, Europarunt, Snälltåget), and the travel magazine Vagabond.



100% increase in revenue from the sale of international rail tickets in Sweden

Overseas markets



Presentation of the 'Germany Shopping Festival' campaign in China

CHINA/HONG KONG

Germany Shopping Festival

The cross-media campaign in partnership with mobile payment service provider Alipay and the online travel portal Mafengwo.com presented routes that combined lots of potential for shopping with premium accommodation and authentic local experiences. At the Germany Shopping Festival in Beijing, visitors were able to collect coupons for a shopping trip to Germany.

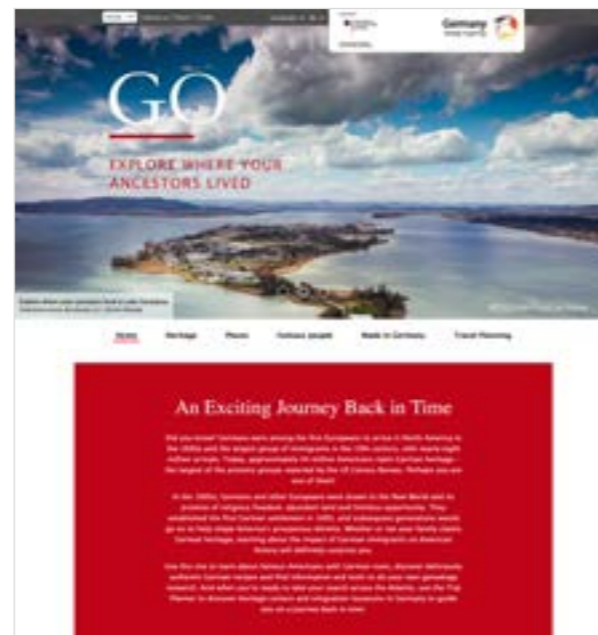
200,000
PAGE VIEWS

More than
21 million
IMPRESSIONS

US

GNTB says GO during German Year in the US

The GNTB launched its GO campaign in 2019 to coincide with German Year in the US. German Year is an initiative funded by the German Foreign Office that was implemented by the Goethe Institute from October 2018 to the end of 2019 with the aim of strengthening the German-American partnership. GO stands for German Originality and builds on the deep historical links between Germany and the US to inspire Americans to visit Germany. Around 44 million US citizens have German roots.



www.germany.travel/en/ms/german-heritage/home.html

More than
12 million
IMPRESSIONS for the digital
campaign for mobile devices

4 INFLUENCERS – **9** BLOG POSTS –
around **10 million** PAGE IMPRESSIONS

2020 CAMPAIGNS

German Summer Cities 2020

Following its successful launch in 2019, the German Summer Cities image campaign will be expanded to high-potential source markets in 2020, including in Asia. The campaign will be run on global OTC platforms and will focus on experiences and visitor attractions in Germany's towns and cities. There will also be selected events in spring 2020 in the top three markets – Israel, the US and China.



Feel Good WWW.GERMANY.TRAVEL/SUSTAINABILITY

The main objective of the 'Feel Good' campaign is to raise the profile of exemplary sustainable offerings that are already available. In the travel agencies, on the booking platforms, in marketing activities and on the GNTB's social media.



Image from the 'Feel good' sustainability campaign

Oberammergau Passion Play

Every ten years, more than 100 performances of the Oberammergau Passion Play draw around 450,000 visitors from across the globe. A cooperation agreement with the organisers of the Oberammergau Passion Play enables the GNTB to promote this authentic cultural event in all the markets it covers. The Passion Play thus features in many of the GNTB's international sales activities, such as roadshows and workshops in North America, Asia and Australasia. The GNTB also includes Oberammergau in its programme of fact-finding tours.



BTHVN 2020

The GNTB's major culture-focused campaign in 2020 is all about the 250th anniversary of the birth of Beethoven. Under the slogan *#DiscoverBeethoven*, it will be promoting Germany as a land of music, online and offline.

BTHVN *#Discover Beethoven* 2020

The key visual for the GNTB campaign is based on the BTHVN2020 anniversary logo, while the *#DiscoverBeethoven* hashtag will be used for the GNTB's activities across the various social media channels.

Cooperation with the Beethoven anniversary organisers

To promote the anniversary abroad, the GNTB will be partnering with Beethoven Jubiläums Gesellschaft mbH. This subsidiary of the Beethoven-Haus Foundation has a remit to shape, promote and coordinate the anniversary year across the regions as an event of international significance. Access to the global GNTB networks will help the organisation to market this major event more efficiently around the world and to open up new markets.

Focus on high-potential source markets

As part of the campaign, the GNTB is placing relevant content in more than 50 markets around the world. A microsite in German, English, French, Chinese and Japanese provides information on all aspects of the anniversary and related cultural tourism offerings. The GNTB is also running international social media campaigns and influencer trips.

B2B activities:

- Events in defined markets
- Press highlight tours

Digital communication formats:

- VR app: play Beethoven's 9th live with the man himself
- AR apps: meet Beethoven 'in person'



Media collaboration with CNN

5 FILMS FOR THE GREAT BIG STORIES SERIES



Nature campaign: *#WanderlustGermany*

Sustainability and beautiful natural landscapes in Destination Germany are at the heart of the second major GNTB campaign for 2020 *#WanderlustGermany*.

The *#WanderlustGermany* campaign will be implemented digitally by means of programmatic advertising and social media activities in eleven of Germany's neighbouring European markets: Austria, Belgium, Czech Republic, Denmark, France, Italy, Netherlands, Poland, Sweden, Switzerland and Spain. The GNTB is also organising events in the top eight markets for the campaign.

The campaign's target groups are:

- Experienced walkers and cyclists who also like to get active on holiday
- Families who are looking for an adventure in the great outdoors
- People who like outdoor activities and good food



Key visual and image for the nature campaign *#WanderlustGermany*

The campaign has its own microsite that serves as a hub for inspiration and information and features image and video content designed specifically for its target audience. The landing page contains videos in the form of travel stories produced by content creators, along with 360° videos and a landscape film. Subpages allow the integration

of individual partners. The campaign is being supported by high-reach promotion on social media, theme-specific newsletters and programmatic marketing on online travel platforms. Tourism partners are able to participate in the campaign's success through various digital, event-based and premium packages.

A LOOK AHEAD TO 2021

NATURE & RELAXATION:

German.Spa.Tradition

The GNTB is planning an engaging information campaign that will use specific examples to showcase Germany's excellent products and services in this segment to potential customers. The campaign will focus on the unparalleled variety offered by the 350 certified spa and health resorts as centres of excellence for health. Besides scenic beauty and clean air, visitors to these places can enjoy a wide range of leisure activities, high-quality art and cultural offerings, a broad array of delicious and healthy diet options, and superb infrastructure.

TOWNS, CITIES & CULTURE:

German.Local.Culture

The planned image campaign is intended to inspire travellers to discover the lesser-known gems among Germany's towns and cities, and not just the more iconic German destinations. Promotion of Germany's most charming small towns (as an add-on to the Magic Cities) will also help to market the rural regions. Taking the pressure off the major cities also makes management of visitor numbers more sustainable.

THE REGIONS' TAKE ON INBOUND TOURISM

What are the two or three most important steps you will be taking this year to drive forward the open-data project?

BADEN-WÜRTTEMBERG

TMBW is currently working on the implementation of the BW Data Pool together with many other organisations in the region. The system is based on the Toubiz database developed by the Land in Sicht agency. When tourism data is captured, an open-data check is now automatically run to ensure that the right licences are assigned to the stored content and that tips and information are digitally archived in a structured way. As well as making sure that the technical systems are in place, we are focusing on bringing knowledge into the sector as a means of supporting our regional partners and familiarising them with the various themes.



Andreas Braun, Managing Director of Tourismus Marketing GmbH Baden-Württemberg (TMBW)



Barbara Radomski, Managing Director of Bayern Tourismus Marketing GmbH

BAVARIA

Open data is an extremely complex subject. There are now a number of national initiatives in addition to Open Data Destination Germany that need to be explained. We therefore consider the essential next step to be providing detailed information to the DMOs and tourism service providers about the functions of the various activities, and the differences between them. Only if everyone involved has the same level of knowledge and shares the same understanding is comprehensive acceptance of and cooperation on this future-focused topic possible.

BERLIN

The digitalisation of visitor flows on the basis of mobile phone data and the evaluation of all systems and content from the perspective of their use for open data are high on the digital agenda for *visit*Berlin in 2020. The next step is the creation of a data hub in which all relevant information is pooled and made available in a structured manner. This creates a basis that will allow us to make even structured data more widely available as open data in future.



Burkhard Kieker, Managing Director of *visit*Berlin



Dieter Hütte, Managing Director of TMB Tourismus-Marketing Brandenburg GmbH

BRANDENBURG

I would like to see as many federal states as possible (and the regions and towns within each state) prioritise the subject of data management and open data as a central management issue for their organisation and to make sure it is appropriately resourced. This year, we aim to continue thinking and acting digitally rather than administratively. This means transparency, cross-border partnerships that operate on a basis of trust, and translating into practice the knowledge that only by working together can we develop meaningful digital products at federal level and beyond.

BREMEN

In order to present Bremen's tourism POIs as open data, we will be checking the data in the Bremen and Bremerhaven content management systems for missing information. We will also ensure that linked media, such as photos, can be made available as open data without infringing third-party rights. The good news is that we have already established that the structured Bremen data can be exported via an interface, and the costs of this are manageable.



Peter Siemering, Managing Director of WFB Wirtschaftsförderung Bremen GmbH (Bremeninvest)



Michael Otremba, Managing Director of Hamburg Tourismus GmbH

HAMBURG

More important than the individual process steps is the attitude with which we approach the subject of data. We are the hospitality sector. And in terms of creating experiences for our guests that are as customised and as inspiring as possible, the GNTB is pursuing the right strategy with its open-data project. The sharing of information leads to greater transparency and cooperation to the benefit of the guest.

HESSEN

Digitalisation is a key factor in the success of Hessen's tourism industry. Our strategic marketing plan 'Tourism 4.0' provides a future-proof basis for our efforts to ensure that Hessen's tourism sector remains able to compete in both the national and global markets. The central objective of the Hessen Tourism regional marketing organisation is to become a centre of digital excellence: our most important next steps and contribution to the open-data project will be to set up a data management system, implement a data hub and provide the relevant organisations in Hessen with training on end-to-end data management.



Folke Mühlhölzer, CEO, and **Herbert Lang**, Head of Tourism and Conference Marketing, HA Hessen Agentur GmbH

MECKLENBURG-WESTERN POMERANIA

The Mecklenburg-Western Pomerania regional tourism organisation has two important items on its open-data project agenda. The first is the switch from our own open-data licence to the globally recognised CCO standard, which also involves informing our local service providers of the opportunities and obligations associated with this change. The second is to collaborate in the expansion of the semantic markups for events, which will be proposed to the standardisation committee schema.org.



Tobias Weitendorf, Managing Director of Tourismusverband Mecklenburg-Vorpommern e.V.

LOWER SAXONY

TMN operates as a catalyst and networker in the area of data management and open-data development in Lower Saxony. As part of a state-wide digital working group, we are driving forward the development of a Lower Saxony hub and open data. Raising awareness among the organisations involved is especially important. We are planning a regional roadshow to help us with this. The aim is to inform as many partners as possible – from regional down to community level – about the project and to get them on board. The GNTB knowledge platform is an invaluable tool in this respect. A further priority is supporting the GNTB in the development of the nationwide knowledge graph.



Meike Zumbrock, Managing Director of TourismusMarketing Niedersachsen GmbH (TMN)



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

NORTH RHINE-WESTPHALIA

In 2020, we aim to set up a regional data hub that will be populated with tourism content by local providers in accordance with uniform standards. It is important to educate the relevant users – and of course ourselves – in subjects such as data mindset, data and rights management and data-driven services. In a further step, we then aim to extend the range of the tourism content and develop new digital use cases.

RHINELAND-PALATINATE

The implementation of our 2025 tourism strategy requires us to put in place the legal, organisational and technical framework necessary for Rhineland-Palatinate's digital knowledge store to be made available as open data. We will therefore be working hard on providing information across the region on the opportunities and benefits of open data for the tourism industry. Data quality and sales will then be managed via a content hub that we are setting up this year.



Stefan Zindler, Managing Director of Rheinland-Pfalz Tourismus GmbH



Birgit Grauvogel, Managing Director of Tourismus Zentrale Saarland GmbH

SAARLAND

The Saarland Tourism Board (TSZ) manages the structured data it holds on POIs, events, hotels and restaurants, holiday accommodation, and towns and villages in the Toubiz database run by the Land in Sicht agency. The categorisation, structuring and checking of rights for the image database is a major challenge. TSZ is in constant dialogue with its regional partners on the subject of open data. It raises its partners' awareness of the importance of analysing existing data, including rights, and of conducting a needs analysis to establish what further data is required.

SAXONY

We took a number of major steps towards the digital future of tourism in Saxony in 2019, including the launch of a comprehensive online project with a state-wide central tourism database and a new website featuring a framework solution for regional partners. This has gone a long way to preparing Saxony for the future of tourism marketing on the basis of open data. The project should be ready to go online by the end of 2020, in line with the GNTB's schedule for national implementation.



Veronika Hiebl, Managing Director of Tourismus Marketing Gesellschaft Sachsen mbH



Thomas Einsfelder, Managing Director of Investitions- und Marketinggesellschaft Sachsen-Anhalt mbH

SAXONY-ANHALT

As well as being a regional marketing organisation, we operate as an economic development agency. As such, we are going one step further by preparing POIs and data sets that are relevant for tourism and for business, so that open data can also be an effective tool for supporting trade and industry. The aim is to create data sets that can be used in a digital portal to highlight all the aspects that make Saxony-Anhalt an attractive destination for tourists, guests, businesses and investors.

SCHLESWIG-HOLSTEIN

Our goal is to establish a nationwide, future-proofed data management system for the whole of Schleswig-Holstein's tourism sector. The existing regional marketing structures and databases will provide the basis for this. To facilitate the pooling of information with other organisations within Schleswig-Holstein, TASH has adopted the concept of a digital data hub. The GNTB's open-data project is an important catalyst for the open-data initiative at regional level. In 2020, TASH plans to strengthen its links with the Germany-wide initiative.



Dr Bettina Bunge, Managing Director of Tourismus-Agentur Schleswig-Holstein GmbH (TA.SH)



Bärbel Grönegres, Managing Director of Thüringer Tourismus GmbH

THURINGIA

2020 is the year of open-data milestones in Thuringia! In October, Germany's digital elite will meet in Jena for the Digital Summit – the most important event in the German IT sector's calendar – and the first national graph-based tourism database will be launched. Named 'Thuringian Content Architecture Tourism' (ThüCAT), the system pools all tourism content and uses the semantic markup system developed by schema.org. As a regional marketing organisation, we will be gradually rolling out the system from March 2020 for all tourism partners in Thuringia.



Global network for sales and marketing



Germany ranked no. 1 as a travel destination

1

In Europe¹:

Austria

Denmark

Netherlands

Poland

Czech Republic

Switzerland

Overseas²:

China

Sources: ¹ IPK International, all European outbound travel worldwide in 2018; ² IPK International, all European travel from overseas in 2018.



TINY [BAU]HAUS, Amsterdam



Regional Management North West Europe

More than a quarter of all international overnight stays in Germany are generated by the traditionally strong source markets in North West Europe. Short travel times and good value for money ensure that Destination Germany's popularity remains at a constantly high level.

GERMANY'S RANKING IN THE LIST OF THE MOST POPULAR TRAVEL DESTINATIONS FOR THESE MARKETS

Source: GNTB/WTM, IPK 2018



Flash sales are particularly important in this region's countries. For example, 80 per cent of Secret Escapes users do not know where they want to travel to when they open the website. Analyses of travel deal vendors show that these portals mainly attract users who are still looking for inspiration: 71 per cent of Travelzoo users and 90 per cent of Secret Escapes users choose a destination spontaneously if they find an attractive deal.

It will be interesting to see what happens in the UK market. Immediately after the Brexit vote in 2016, there was an expectation within the industry that the British public's appetite for travel would decline significantly. In 2019, this was reflected in the fall in the number of outbound travellers from the UK to all key travel destinations.

'Most Romantic Places in Germany' OTC campaign on the theme of palaces, parks and gardens (UK)

Examples of campaigns in North West Europe in 2019/2020

Oranjeroute (NL)

OTC campaign on the 2020 theme of Beethoven 'The Sound of Germany' (UK)

Nature-based & active holidays (UK, NL, BE)

OTC campaigns on short breaks (NL, BE)

Macro-regional digital campaign with OTCs 'Germany in full colours' (UK, NL, BE)

Regional Management North East Europe

Around 14 per cent of inbound tourism is generated by this region, which covers countries that present an extremely mixed picture in terms of travel trends. The established Scandinavian markets are stable. The fall in the number of visitors arriving from Scandinavia by air is offset by the increase in overland trips. In contrast, the former Eastern Bloc countries are developing rapidly and are generating growth from the region.

Poland has firmly established itself in the top ten source markets for inbound tourism to Germany and is consolidating this position thanks to double-digit growth. OTC platforms are the leading medium for holiday bookings among independent travellers (90 per cent of the market). Trips from

regions close to the German border continue to be a major driver of growth. After years of crisis, Russia continues to grow and is boosting shopping tourism, in particular. Ukraine and some of the smaller emerging markets in the Balkans are generating double-digit growth.



B2C event 'German Summer Cities', 14–16 June 2019, Krakow (Poland)

Examples of campaigns

in North East Europe in 2019/2020

Digital youth travel campaign with T-Mobile (PL)

Macro-regional Fly and Drive campaign with SAS (DK, SE, NO, FI)

Online 'Ski holidays' campaign (DK)

Sustainability campaign to promote holidays by train (SE)

Mini-breaks / 'Ein smuttur' (DK)

Online medical tourism campaign (RU)

Digital campaign 'Prophet' with search platform Aviasales – Artificial Intelligence vs. User (RU)

OTC and online 'Castles and Palaces' campaign (PL)

Digital Nature & Active campaign (PL, SE)

Cross-media campaign to promote tourism from regions close to the German border and tourism in eastern Germany (PL)

GERMANY'S RANKING IN THE LIST OF THE MOST POPULAR TRAVEL DESTINATIONS FOR THESE MARKETS

Source: GNTB/WTM, IPK 2018



Regional Management South West Europe

One in five international overnight stays in Germany is generated by the source markets in South West Europe. Switzerland, Italy, France and Spain are traditionally among the top ten European markets for inbound tourism to Germany. They are consolidating this positioning thanks to solid, and in some cases above-average, growth.

GERMANY'S RANKING IN THE LIST OF THE MOST POPULAR TRAVEL DESTINATIONS FOR THESE MARKETS

Source: GNTB/WTM, IPK 2018



Germany remains a hugely popular destination for Swiss travellers because it offers excellent value for money. Alongside city breaks, shopping plays an important role in regions around the border. Spain continues to go from strength to strength and Italy and France are also registering growth significantly above the European average.

Online is king: 58 per cent of French travellers book their trips on a smartphone or tablet. Swiss travellers book 69 per cent of trips via online portals, with 66 per cent booked directly with the service provider.

Macro-regional campaigns advertise Germany's easy accessibility and its wide range of tourism offerings to web-savvy consumers.



Press lunch for the '30 years after the fall of the Berlin Wall' campaign, 12 November 2019, Zurich

Macro-regional OTC campaign with Voyage Privé to market the major German opera houses (FR, ES, FR, IT)

Online Nature & Active campaign (FR, ES, IT, CH)

Cross-media Lufthansa campaign (FR)

Examples of campaigns

in South West Europe in 2019/2020

Campaign with Deutsches Küstenland (ES)

Family Holidays in Germany (ES)

Macro-regional, cross-media campaign with Thalys (FR, BE)

Christmas markets (IT)

Cross-media train travel campaign 'Get onboard and explore' GNTB/Rheinalp (CH)

Train travel campaign DB/SNCF (FR)

'Germany off the beaten track' macro-regional influencer campaign (IT, CH, FR, ES)

Regional Management South East Europe

The fastest-growing source region in Europe for inbound tourism to Germany reaches from Germany's neighbour Austria to the Balkans and beyond. The popularity of Germany is increasing steeply almost everywhere. Tourism from the South East Europe region is already outstripping the rate of growth that had been predicted as part of our 2030 forecast.

GERMANY'S RANKING IN THE LIST OF THE MOST POPULAR TRAVEL DESTINATIONS FOR THESE MARKETS

Source: GNTB/WTM, IPK 2018



Austria maintains its position in the top five source markets, boosted in no small part by the excellent transport links with 600 flight connections and 260 rail connections every week. There is further room for growth in the Czech Republic for spontaneous mini-breaks, young travellers and families. The smaller markets in the Balkan region are also registering double-digit growth. The money spent on marketing with the Danube Competence Center is paying off.

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

ÖBB/DB campaign #träumweiter0049 (AT)

Digital out-of-home backlit poster campaign, Serbia (Balkans)

Digital campaign with the OTC platform Secret Escapes (AT)

Examples of campaigns in South East Europe in 2019/2020

Online 'Spellbinding Christmas' campaign (Balkans)

Macro-regional digital campaign with Red Bull Mediahouse 'Fahrtwind Deutschland' (CH & AT) focused on active holidays/cycling

Insider tips for enjoying nature in Germany (AT)



GNTB event to launch '100 years of Bauhaus', 18 June 2019, Vienna

Regional Management Americas/Israel

Around 12 per cent of all overnight stays in Germany are generated by the markets in this region. Overall, performance is above average, though the contribution that the individual countries make to inbound tourism to Germany varies considerably. The US is the engine of growth here and – with its economic growth now outperforming the G7 average – is further consolidating its position as the leading overseas source market.

GERMANY'S RANKING IN THE LIST OF THE MOST POPULAR EUROPEAN TRAVEL DESTINATIONS FOR THESE MARKETS

Source: GNTB/WTM, IPK 2018



Economic weakness and political instability depressed the appetite for travel in various high-potential markets in South America last year. Only Brazil was able to recover the losses of the previous years. A trend is also emerging towards direct booking: according to a Phocuswright report, digital travel sales amounted to US\$ 55 billion. Growth of inbound tourism from Israel is slowing as a result of a reduction in the number of flights and higher flight prices. Increased reports of xenophobic and anti-semitic attacks are also having a negative impact.

Examples of campaigns

in the Americas in 2019/2020

US Advisory Board
Workshop in Berlin

German Originality campaign for German Year (US)

TripAdvisor campaign on the Towns and Cities theme (US)

OTC campaigns with
Despegar in Brazil,
Argentina and Mexico

Instagram campaign on
Beautiful Destinations (US)

Germany Market Place (US)

DG Marketplace in the Porsche Experience Center, September 2019, Los Angeles





Kick-off event for BTHVN2020, 15 January 2020, Beijing

Regional Management Asia-Pacific

Despite a slight decline in the number of overnight stays in 2019, Asia remains the major region with the highest growth potential for tourism worldwide and to Destination Germany. China is by far the most important source market in the region and underlined this position with further significant growth in 2019, although political protests (the Umbrella Movement), the weaker economy and international trade disputes depressed the number of overnight stays. The market is dominated by powerful domestic OTCs such as Trip.com (formerly Ctrip), which has a 65 per cent share of the market. 700 million Chinese are already using mobile payment solutions from Alipay.

Arrivals from the Arab Gulf States have fallen again, partly because of regional tensions that are inhibiting outbound tourism to Europe. In addition, millennials are more price sensitive and more likely to travel independently than their parents' generation. Further influencing factors include the lessening importance of medical tourism and the fact that hot summers in Europe are less attractive.

Arrivals from India increased, while Japan and Australia remain below the general growth rates.

The GNTB continues to run a lot of marketing activities in the region to tap into the high potential for growth in the Asian markets overall. The sales and marketing agency, which opened in 2017, systematically develops the markets in Singapore, Thailand, Malaysia and Indonesia.

GERMANY'S RANKING IN THE LIST OF THE MOST POPULAR EUROPEAN TRAVEL DESTINATIONS FOR THESE MARKETS

Source: GNTB/WTM, IPK 2018



ITB India (IN)

Campaign with Singapore Airlines (ASEAN)

B2C campaign
'Unscripted Germany' (IN)

Influencer x Zeiss campaign (CN/HK)

China Industry Meet Up (CN)

Germany Shopping
Festival (CN)

Arabian Travel Market (UAE)

ASEAN roadshow
(TH, MY and ID)

Examples of campaigns in Asia-Pacific 2019/2020



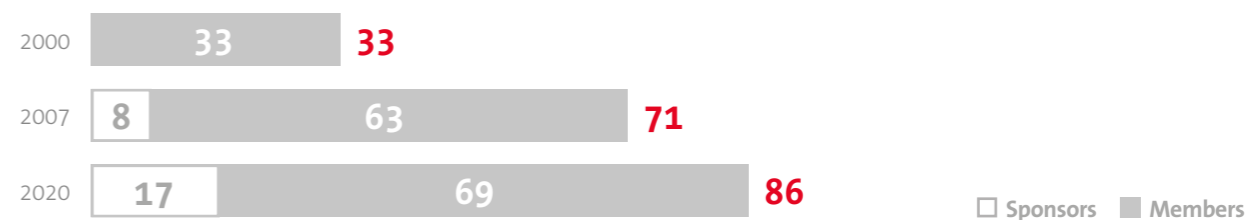
ORGANISATION, FACTS
AND FIGURES

ORGA- NISING EFFICIENTLY

Sector-wide expertise is combined with innovative organisational structures to make the most efficient use of available resources and to bring further success for Destination Germany.

GNTB members, sponsors and partners

STRONG GROWTH IN MEMBERSHIP



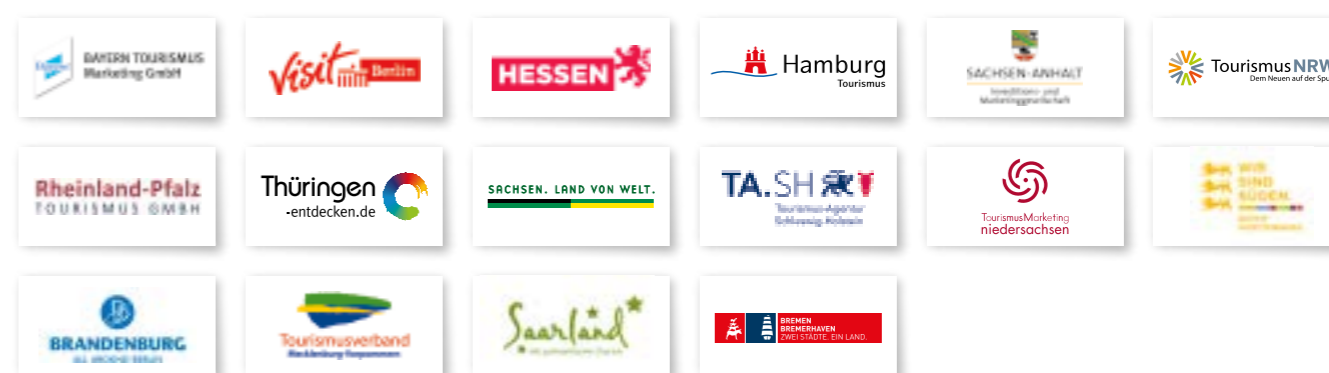
69 GNTB members: 39 tourism companies, 16 regional marketing organisations and 14 associations and organisations

COMPANIES



A • Accor Hospitality Germany GmbH • Amadeus Deutschland GmbH • Autostadt GmbH • Avis Budget Autovermietung GmbH & Co. KG • **B** • Best Western Hotels Central Europe GmbH • **D** • DB Vertrieb GmbH • Deutsche Hospitality • Deutsche Lufthansa AG • Deutsches Jugendherbergswerk (DJH) • Deutsches Weininstitut GmbH • **E** • ERGO Reiseversicherung AG • Europa-Park GmbH & Co Mack KG • **F** • Flughafen Düsseldorf GmbH • Flughafen München GmbH • Fraport AG • Friedrichstadt-Palast Betriebsgesellschaft mbH • **G** • GALERIA Karstadt Kaufhof GmbH • Germania Fluggesellschaft mbH • Global Blue Deutschland GmbH • Grand City Hotels GmbH • **H** • HanseMerkur Reiseversicherungsgruppe • Hertz Autovermietung GmbH • **J** • JCB International Ltd. German Branch • **L** • Lindner Hotels AG • Lufthansa City Center International GmbH • **M** • Maritim Hotelgesellschaft mbH • McArthurGlen Management GmbH • Messe Berlin GmbH • **O** • Outletcity Metzingen Holy AG • **R** • Ringhotels e.V. • Romantik Hotels & Restaurants AG • **S** • Sixt SE • Staatliche Porzellan-Manufaktur Meissen GmbH • **T** • Travel Easy Innovation GmbH • TUI AG • **V** • Value Retail Management Germany GmbH • VAT IT Gruppe • VISA European Management Services Ltd., German Branch • **W** • Wellness-Hotels & Resorts GmbH

TOURISM MARKETING ORGANISATIONS OF THE FEDERAL STATES



Bayern Tourismus Marketing GmbH • Berlin Tourismus & Kongress GmbH • HA Hessen Agentur GmbH – Tourismus- und Kongressmarketing • Hamburg Tourismus GmbH • Investitions- und Marketinggesellschaft Sachsen-Anhalt mbH (IMG) • Tourismus NRW e.V. • Rheinland-Pfalz Tourismus GmbH • 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) • Tourismusverband Mecklenburg-Vorpommern e.V. • Tourismus Zentrale Saarland GmbH • WFB Wirtschaftsförderung Bremen GmbH

CORPORATE BODIES, ASSOCIATIONS, FOUNDATIONS AND INSTITUTIONS



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) • Deutscher Industrie- und Handelskammertag e.V. (DIHK) • Deutscher Reiseverband e.V. (DRV) • Deutscher Tourismusverband e.V. (DTV) • **G** • German Convention Bureau e.V. (GCB) • **H** • Historic Highlights of Germany e.V. (HHOG) • Hotelverband Deutschland (IHA) e.V. • **M** • Magic Cities Germany e.V. (MCG) • **R** • RDA Internationaler Bustouristik Verband e.V. • **U** • UNESCO-Welterbestätten Deutschland e.V. • **W** • Willy Scharnow-Stiftung für Touristik

Additional strategic partner: Deutsches Küstenland e.V. (represented in the GNTB member portfolio by the northern German regional marketing organisations)

SPONSORS



B • AG Leichter Reisen – Barrierefreie Urlaubsziele in Deutschland • Bundesverband der Deutschen Incoming-Unternehmen e.V. • Bundesverband der Gästeführer in Deutschland e.V. (BVGD) • **C** • Cittaslow Deutschland e.V. • **D** • Deutsche Gesellschaft für Tourismuswissenschaft e.V. (DGT) • **F** • FAZIT Communication GmbH • **H** • Hochschule Heilbronn – Fakultät für International Business • **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 • **U** • Tourismusverband Sächsische Schweiz e.V. • **U** • Usedom Tourismus GmbH • **V** • Verband Deutscher Naturparke e.V.

INTERNATIONAL STRATEGIC PARTNERS



A • Atout France • **C** • Czech Tourism • **D** • DACH-Meetings • Danube Competence Center (DCC) • **E** • European Cities Marketing (ECM) • European Travel Commission (ETC) • EU Strategy for the Baltic Sea Region (EUSBSR) • **P** • Pacific Asia Travel Association (PATA) • Polnische Organisation für Tourismus (POT) • **W** • World Tourism Organization (UNWTO)

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.

OTHER COOPERATION PARTNERS



A • Ausstellungs- und Messeausschuss der Deutschen Wirtschaft e.V. (AUMA) • **D** • Deutsche Welle (DW-TV) • Deutscher Wanderverband (DWW)



FACTS AND FIGURES

Administrative aspects as drivers of internal digital processes

The GNTB's administrative functions had a new focus in 2019, which involved installing, implementing and project managing a digital information platform for data sharing, project development, task coordination and employee collaboration.

Other key areas for action included needs-based and forward-thinking HR planning and development, and the economical use of resources. Continually reviewing and adapting administrative processes in order to optimise the sharing of core competencies between the GNTB's administrative units and its departments and offices abroad remains an important cornerstone of the GNTB's success.

Financial management

The total income of the GNTB in 2019 was much higher than in previous years and more than had been estimated in the business plan. Membership contributions remained stable, and the federal government has again increased its financial commitments. Personnel costs rose only slightly, and remained significantly below the original business plan estimate due to vacant positions and exchange rate effects. Rising costs globally led to higher operating expenses, while the completion of digital projects freed up additional funds for investment. All savings and additional earnings achieved relative to the business plan were used to increase expenditure on marketing. To safeguard the digital marketing strat-

egy, the Federal Ministry for Economic Affairs and Energy (BMWi) further increased its grant in 2018 and 2019, thereby providing planning certainty until 2022. This will see the BMWi continue to make a major contribution to the GNTB's funding, which will help the organisation to step up its activities in international source markets and make further progress in the digitalisation of its global activities. In doing this, the ministry underlined how important it is to bolster the economy and to secure jobs in the tourism industry.

Income

In 2019, income from services increased by almost 20 per cent to €8.4 million (2018: 7.1 million). Online advertising

€8.4 million
Income from services

in all its various forms made a particularly strong contribution to this, with earnings in this category rising to over €1.8 million (2018: €1.2 million).

The BMWi increased its financial contribution to €34.285 million, a rise of 5 per cent. After deducting the remaining cash on hand of around €335,000, the federal grant in 2019 came to around €34 million.

Income from grants and contributions held steady at €0.8 million, while non-cash contributions from our tourism partners dropped to €2.2 million (2018:

GNTB FINANCIAL OVERVIEW: SOURCES AND APPROPRIATION OF FUNDS¹⁾

INCOME	2019	%	2018	%	2017	%	2016	%	2015	%	2014	%	2013	%
Income from services	8,392	19.5	7,058	17.4	8,223	20.8	7,539	19.5	7,468	19.3	7,288	20.1	7,320	20.2
Grants from the BMWi	33,950	78.7	32,607	80.6	30,474	77.2	30,414	78.5	30,508	78.7	28,302	77.9	28,273	78.0
Grants and contributions from members	780	1.8	790	2.0	774	2.0	799	2.1	775	2.0	733	2.0	649	1.8
Income from GNTB budget²⁾	43,122	100.0	40,455	100.0	39,471	100.0	38,753	100.0	38,752	100.0	36,323	100.0	36,242	100.0
Income from special projects ³⁾	303		257		129		135		109		121		352	
Total income (consolidated)	43,426		40,712		39,600		38,887		38,860		36,444		36,594	
Additional income from non-cash contributions	2,182		2,877		1,785		1,353		1,215		1,280		1,765	
EXPENDITURE	2019	%	2018	%	2017	%	2016	%	2015	%	2014	%	2013	%
Personnel expenditure for marketing and administration	11,513	26.7	11,385	28.1	11,341	28.7	11,443	29.5	11,094	28.6	10,625	29.3	10,420	28.8
Other operating expenses	2,944	6.8	2,758	6.8	2,772	7.0	2,722	7.0	2,849	7.4	2,868	7.9	2,700	7.4
Capital investment	373	0.9	257	0.6	356	0.9	321	0.8	305	0.8	314	0.9	502	1.4
Marketing costs	28,292	65.6	26,055	64.4	25,002	63.3	24,267	62.6	24,503	63.2	22,516	62.0	22,620	62.4
Expenditure from GNTB budget²⁾	43,122	100.0	40,455	100.0	39,471	100.0	38,753	100.0	38,751	100.0	36,323	100.0	36,242	100.0
Expenditure on special projects ³⁾	303		257		129		135		109		121		352	
Total expenditure (consolidated)	43,426		40,712		39,600		38,887		38,860		36,444		36,594	
Use of additional income from non-cash contributions	2,182		2,877		1,785		1,353		1,215		1,280		1,765	

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.

€2.8 million). All of the non-cash contributions, whose share of the overall budget was 5 per cent, were used for GNTB marketing activities and underpinned the high financial contribution made by the tourism industry.

Expenditure

Despite increases due to collectively agreed pay rises, the personnel costs

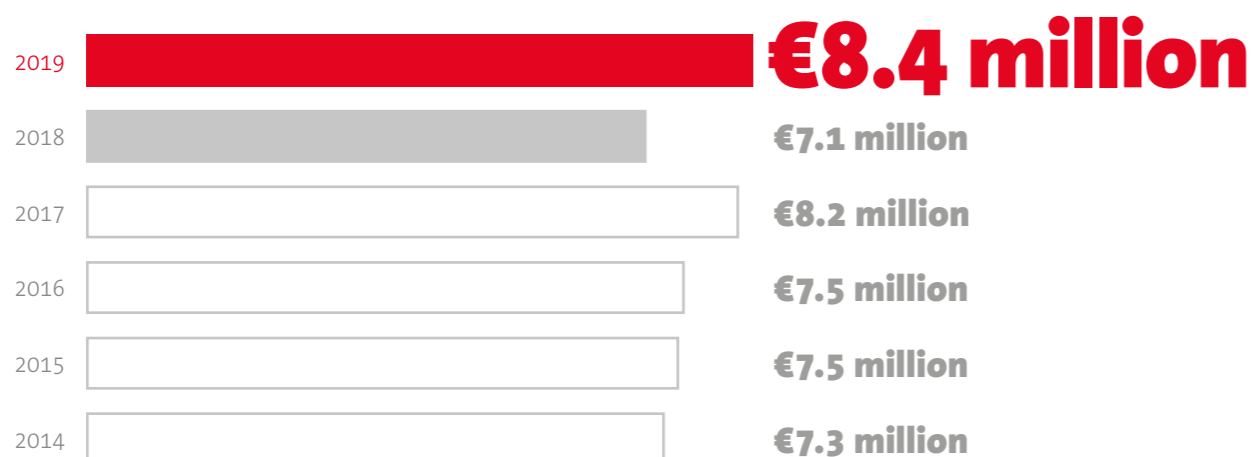
of €11.5 million were only slightly higher than the previous year's level of €11.4 million after exchange rates were taken into account. In total, €0.8 million was reclassified as marketing costs. The share of the GNTB's overall budget attributable to personnel costs dropped to 26.7 per cent (2018: 28.1 per cent).

Marketing expenditure reached a record high of €28.3 million (2018:

€26.1 million). The proportion of the GNTB's overall budget spent on marketing rose to 65.6 per cent (2018: 64.4 per cent). Taking into account non-cash contributions that were used for marketing activities, marketing expenditure actually increased to €30.5 million (2018: €28.9 million).

In addition to the increased income from services and federal grants, the

INCOME FROM INTERNATIONAL MARKETING SERVICES



main factor in the significant rise in marketing expenditure was the reduction of €832,000 in personnel costs relative to the business plan. Around €171,000 was also saved on other operating and administrative expenses, and used for marketing purposes.

€28.3 million
spent on marketing

At €373,268, investments returned to a normal level following the completion of projects (2018: €257,268).

Other operating expenses remained stable at €2.9 million. Overall, the financial performance of the GNTB in 2019 was very good.

A look ahead to 2020

The digitalisation and evaluation of all finance-related processes continues to be the focus of the GNTB's digital strategy in 2020. The increase in areas of responsibility (reporting and monitoring) and continued scarcity of personnel resources are driving efforts to make greater use of digital technologies in

business processes. As a trendsetter for digital formats, the GNTB will continue to work on changes to its portfolio of services in the coming year. The objective for 2020 is to further increase revenue, which in light of the global situation is an ambitious, but not impossible, ask. The detailed planning for 2020, and also the revenue targets for 2021, suggest a positive revenue outlook. However, the prevailing social, political and environmental changes and challenges at global level will continue to require the GNTB and its members and partners to invest in the promotion of tourism to Germany.

Information technology

The virtualisation of servers (VMware), desktops (Citrix) and storage (SVC) has enabled the flexible provision of a needs-based IT infrastructure. Thanks to this infrastructure, we will be able to meet the requirements of modern IT, such as remote working, cross-site teamwork and unified communication.

Intranet

With collaboration in cross-functional teams on the rise, it became necessary to upgrade the collaboration solutions

we had been using. In 2019, we migrated our existing intranet onto a new future-proof platform. The SharePoint solution provides options for international collaboration across functions and projects between head office, the foreign representative offices and the sales and marketing agencies. Working with the departments, we are continually expanding and improving the 'collaboration platform' and 'project management' aspects of the digital strategy.

Windows 10 migration

With the end of Microsoft support for Windows 7, migrating workplace PCs was a priority. This was largely completed in 2019, and we now have an up-to-date system environment again for the coming years. Where necessary, workplace hardware was upgraded as part of the process.

Wi-Fi/internet

Increasing digitalisation brings with it larger data volumes, and this needs to be taken into account. Along with the new contract for the MPLS network between head office and the foreign representative offices, the opportunity was taken to increase the bandwidth of

the network connections. This upgrade was completed successfully in 2019.

Data protection at the GNTB

The GNTB considers data protection to be extremely important.

Personal data is always processed in accordance with applicable data protection laws, such as GDPR in the EU and any country-specific data protection regulations that apply to the GNTB. Our privacy policy informs the public of how, for what purpose and to what extent we record, use and process personal data. Data subjects are also informed of their statutory rights. The privacy policy is published on the GNTB website.

In its capacity as data controller, the GNTB continued to implement and refine numerous technical and organisational measures in 2019 to ensure that personal data is protected as fully as possible.

Human resources

The GNTB's success depends to a large extent on the ideas, expertise, enthusi-

asm, commitment and health of its employees. The professional development and training options to improve employee-orientation and customer-focus are continually being expanded. In 2019, initiatives for identifying talented staff were further strengthened. The GNTB pursues a comprehensive approach to diversity, whereby diversity in terms of gender, demographics and international outlook brings with it a mix of perspectives and a boost to competitiveness.

Ambitious targets were set with regards to the implementation of Germany's law for the equal participation of women and men in managerial positions in the private and public sectors. The proportion of women in the GNTB's workforce is just under 70 per cent, with women filling around half of all management positions. In addition to fulfilling its legal obligation to set targets for the proportion of women in management positions, the GNTB has the further aim of improving work-life balance. The GNTB will continue its efforts in this area in order to remain an attractive employer in the future, focusing in particular on modern and

flexible working conditions, the compatibility of work with family life, and rigorous talent management. Firmly embedding diversity targets in the responsibilities of senior management is key to the GNTB's mission.

The GNTB employment plan covered 151.1 positions. Of this total, 74.1 are at head office, 75 are based abroad, and there are two executive positions.

Training and development GNTB employee named the best tourism and leisure trainee in Hessen

One of the GNTB's trainees, who qualified as a certified tourism and leisure professional in June 2019, was named as the best trainee in this profession in Hessen and awarded a certificate from the regional chamber of industry and commerce in October 2019.

This success reflects an ongoing focus on training, which the GNTB's senior management regards as a high priority and which is actively supported by all members of staff. The training gives young people the skills and expertise they need to succeed in their chosen

BREAKDOWN OF EXPENDITURE

8.9%
ADMINISTRATION COSTS

2018: 8.9%
2017: 9.2%
2016: 9.2%
2015: 9.5%



91.1%
MARKETING COSTS

2018: 91.1%
2017: 90.8%
2016: 90.8%
2015: 90.5%

profession, and increases their enjoyment of working in the tourism sector.

GNTB adds further traineeship

The GNTB launched a training programme for marketing communications in 2019. Two new recruits embarked on the traineeship in August and are moving through all departments relevant to their specialism.

The GNTB's eleven trainees are receiving professional training in tourism and leisure, tourism, and marketing communications.

The GNTB trainees spend time in all relevant head office departments and gain additional tourism experience in our European representative offices, at the ITB and the GNTB's Germany Travel Mart, and with a tour operator or at a tourist information office. This gives them relevant industry expertise and people skills that will stand them in good stead in their professional careers, and prepares them for a job in the German tourism industry or for further studies.

Degree apprenticeships

The degree apprenticeship programme was introduced in 2018 and now comprises six students who are com-

pleting their practical training at the GNTB. During the three years of the programme, students get to know the departments relevant to their course, assist with projects and participate in day-to-day business operations. The degree apprenticeship will provide trainees with all the skills they need to take up a permanent position at the GNTB, either in Germany or abroad, or with another organisation in the tourism industry.

Internships for students

Many different vocational training courses and university degrees in tourism-related subjects incorporate work placements of varying lengths. In 2019, the GNTB again offered internships for BA and MA students in the areas of market research, media management, press relations and international markets. The interns were involved in current projects and were able to put their theoretical knowledge into practice. In addition to content related to the areas described above, the interns also learned about the GNTB's day-to-day operations and acquired experience in teamwork, communications and work organisation.

Training

Ever-changing markets, management innovations and new tools for tourism

€34.0 million
in federal grants

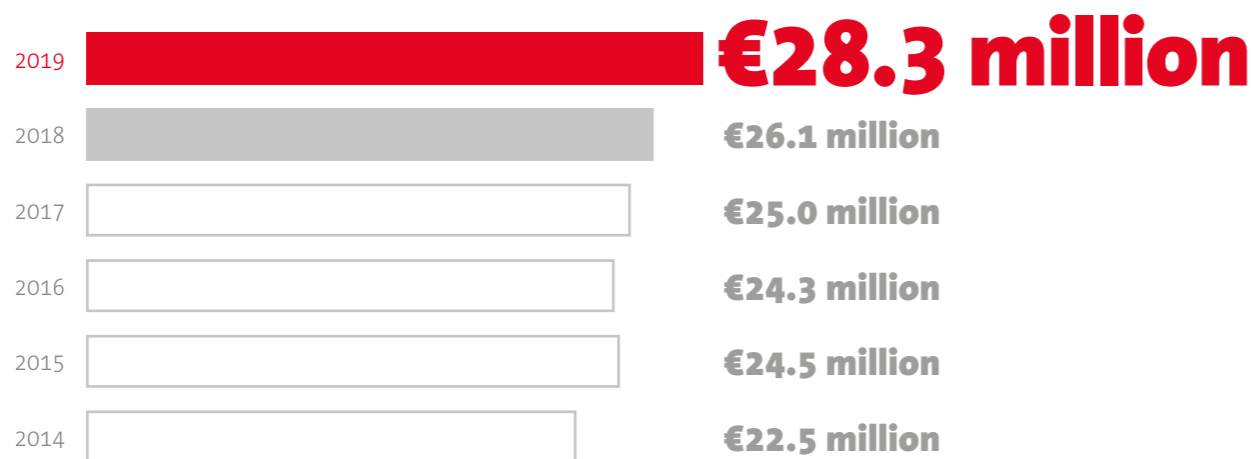
marketing all create a need for ongoing training. As the period decreases during which qualifications can be considered up to date, going through an entire career without continuing professional development (CPD) has become inconceivable. CPD not only enables employees to adapt to changes in their jobs, it also helps them to develop as people. Moreover, it can act as a guide on how to react appropriately to change processes. In light of the requirements of data protection, we place a high value on CPD and offer certified training for all employees.

The GNTB's goal is to prepare its employees for current and future requirements by providing appropriate CPD activities. In addition to job-related training, honing the people skills needed in interactions with other employees and business partners also plays a major role. The GNTB supports this by offering seminars and training courses geared to the activities of its employees in Germany and abroad.

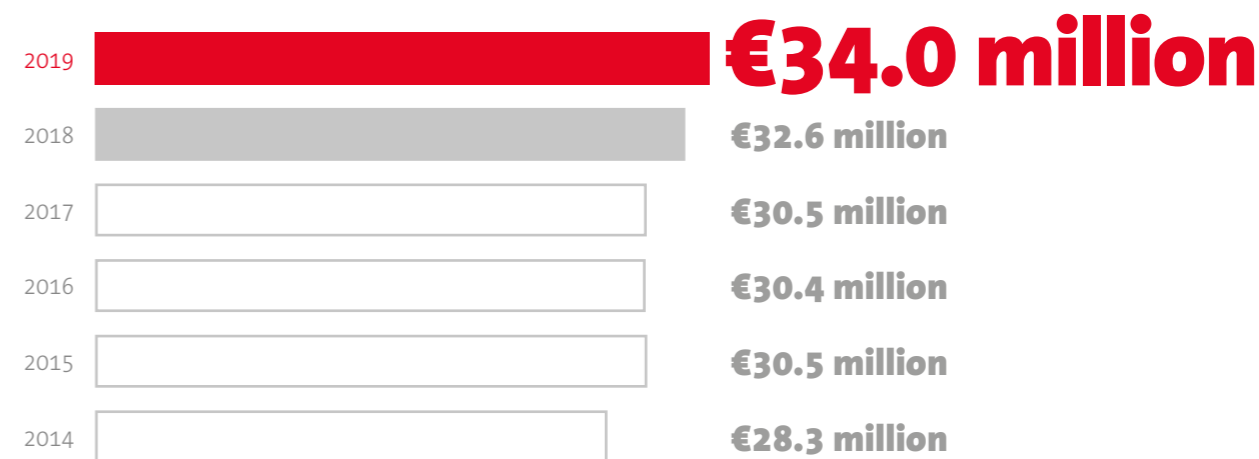


The GNTB's Germany stand at the 2019 ITB

MARKETING COSTS



GRANTS FROM THE FEDERAL MINISTRY FOR ECONOMIC AFFAIRS AND ENERGY



MEMBERS OF THE GNTB BOARD OF DIRECTORS

elected at the 120th general meeting on 13 December 2017
(as at February 2020)

PRESIDENT



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

VICE PRESIDENTS



Hubert Aiwanger,
Bavarian State Minister of Economic Affairs, Regional Development and Energy



Peter Siemering,
Managing Director of WFB Wirtschaftsförderung Bremen GmbH (Bremeninvest)



Guido Zöllick,
President of the German Hotel and Restaurant Association (DEHOGA)

OTHER ELECTED MEMBERS



Heike Birlenbach,
Senior Vice President Sales Lufthansa Group Network Airlines and Chief Commercial Officer of Hub Frankfurt



Andreas Braun,
Managing Director of Tourismus Marketing GmbH Baden-Württemberg (TMBW)



Armin Dellnitz,
Chief Executive Officer of Magic Cities Germany e.V.



Thomas Ellerbeck,
Member of the Group Executive Committee, Group Director of Corporate & External Affairs, TUI Group



Benedikt Esser,
President of the RDA International Coach Tourism Federation



Norbert Fiebig,
President of the German Travel Association (DRV)



Dr Christian Göke,
Chief Executive Officer of Messe Berlin GmbH



Karina Kaestner,
Head of Partner Management and B2B Sales DB Vertrieb GmbH



Andreas von Puttkamer,
Head of the Aviation Division, Flughafen München GmbH



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



Thomas Willms,
Chief Executive Officer and spokesperson for the Executive Board, Deutsche Hospitality

MINISTERIAL REPRESENTATIVES



Dagmar Rothacher,
Director in charge of Subdepartment I D, Federal Ministry for Economic Affairs and Energy (BMWi)



Markus Siebels,
Ministerial Counsellor, Head of Department II A3 Federal Ministry of Finance

INVITED MEMBERS



Thomas Bareiß,
Member of the German Parliament, Parliamentary State Secretary at the Federal Ministry for Economic Affairs and Energy and Federal Government Commissioner for Tourism



Dr Marion Weber,
Ministerial Counsellor, Head of Department VII A 4-Tourism Policy, Federal Ministry for Economic Affairs and Energy (BMWi)



Klaus Laepple, President of the Federal Association of the German Tourism Industry (ret.); Honorary President of the GNTB and the German Travel Association

"Germany's inbound tourism sector is growing much faster than forecast, with around 90 million overnight stays by international visitors in 2019. Congratulations to the GNTB for this achievement!"



Ernst Fischer, President of DEHOGA, the German Hotel and Restaurant Association (ret.)

"The GNTB has once again captured the zeitgeist with its marketing activities in 2019: quality tourism and sustainability are key social trends of our time."

MEMBERS OF THE GNTB ADVISORY BOARD

elected at the 120th general meeting on 13 December 2017
(as at February 2020)

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 CHAIRMAN

Brigitte Goertz-Meissner,
President of the German Spa Association

OTHER ELECTED MEMBERS

Dr Martin Buck,
Director of the Travel & Logistics Competence Center, Messe Berlin GmbH

Martin Katz,
Group Destination Director, Hotel-only Holidays, FTI Group

Dr Michael Kerkloh,
Chief Executive Officer of Flughafen München GmbH (until 31 December 2019)

Hans-Gustav Koch,
Managing Director of the Willy Scharnow Tourism Foundation

Dr Roland Mack,
Managing Partner of Europa-Park GmbH & Co – Mack KG

EX OFFICIO MEMBERS

Tilman Enders,
Head of Department 405 – Digital Transformation and Mobility, Federal Foreign Office

Dr Heinrich Neumann,
Head of Department for Finance, Economic Affairs and Digital Policy, Press and Information Office of the Federal Government

Iris Reimold,
Head of Department G 10 (fundamental issues), Federal Ministry of Transport and Digital Infrastructure

FEDERAL STATE REPRESENTATIVES

16 representatives of the ministers (senators) responsible for tourism in the federal states

BADEN-WÜRTTEMBERG
Chief Ministerial Counsellor Fred-Jürgen Stradinger,
Ministry of Justice and European Affairs

BAVARIA
Ministerial Counsellor Gabriele Fink
Bavarian Ministry of Economic Affairs, Regional Development and Energy

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

BRANDENBURG
Ministerial Counsellor Martin Linsen,
Ministry for Economic Affairs and Energy

FREE HANSEATIC CITY OF BREMEN
Dr Christel Lübben,
Senator for the Economy, Labour and Ports

FREE HANSEATIC CITY OF HAMBURG
Bernd Meyer,
Office of Economic Affairs, Transport and Innovation

HESSEN
Ulrike Franz-Stöcker,
Ministry of Economic Affairs, Energy, Transport and Housing

MECKLENBURG-WESTERN POMERANIA
Gerd Lange,
Ministry for Economic Affairs, Labour and Health

LOWER SAXONY
May-Britt Pürschel,
Ministry for Economic Affairs, Labour, Transport and Digitalisation

NORTH RHINE-WESTPHALIA
Ministerial Counsellor Frank Butenhoff,
Ministry for Economic Affairs, Energy, Industry, SMEs and Skilled Trade

RHINELAND-PALATINATE
Nicole Dawood-Klein,
Ministry of Economic Affairs, Transport, Agriculture and Viniculture

SAARLAND
Administrative Director Dr Rainer Schryen,
Ministry for Economic Affairs, Labour, Energy and Transport

SAXONY
Ministerial Counsellor Frank Ortman,
Ministry for Economic Affairs, Labour and Transport

SAXONY-ANHALT
Elke Zawatzki,
Ministry of Economy, Science and Digitalisation

SCHLESWIG-HOLSTEIN
Kim Hartwig,
Ministry for Economic Affairs, Transport, Labour, Technology and Tourism

THURINGIA

Olaf Dirlam,
Ministry of Economic Affairs, Science and Digital Society

GNTB SPONSORS

There are currently 17 GNTB sponsors

MEMBERS OF THE GNTB INTERNATIONAL MARKETING COMMITTEE

elected at the 120th general meeting on 13 December 2017
(as at February 2020)

ELECTED MEMBERS

Dr Jürgen Martin Amann, Managing Director, KölnTourismus GmbH	Yvonne Coulin, CEO and Manager of Nuremberg Convention and Tourist Office	Armin Dellnitz, Managing Director of Stuttgart-Marketing GmbH
Thomas Feda, Managing Director of Tourismus+Congress GmbH Frankfurt am Main	Geraldine Knudson, Head of München Tourismus Department for Work and the Economy	

REGIONAL MARKETING ORGANISATIONS

BADEN-WÜRTTEMBERG Andreas Braun, Managing Director of Tourismus Marketing GmbH Baden-Württemberg	BAVARIA Barbara Radomski, Managing Director of Bayern Tourismus Marketing GmbH	BRANDENBURG Dieter Hütte, Managing Director of 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 Tourismus Marketing Gesellschaft Sachsen mbH	SAXONY-ANHALT Thomas Einsfelder, Managing Director of Investitions- und Marketinggesellschaft Sachsen-Anhalt mbH	

EX OFFICIO MEMBERS

The 53 tourism companies and associations that are members of the GNTB.

ACCORHOTELS DEUTSCHLAND GMBH Michael Hartmann, Director of Leisure Sales Europe	ALLGEMEINER DEUTSCHER FAHRRAD-CLUB E.V. (ADFC) Louise Böhler, Head of Tourism	AMADEUS GERMANY GMBH Brigitte Löhl, Director of Destinations and Media Solutions
AUTOSTADT GMBH Ute Lageschulte, Project Manager, Sales & Tourism	AVIS BUDGET AUTOVERMIETUNG GMBH & CO. KG Julieta B. Rehnel, Manager Direct Sales	BUNDESVERBAND DER DEUTSCHEN TOURISMUSWIRTSCHAFT E.V. (BTW) Michael Rabe, General Secretary
BWH HOTEL GROUP CENTRAL EUROPE GMBH Alexander Birk, Head of Marketing	DB VERTRIEB GMBH Marcel Noee, International Marketing Manager	DEUTSCHE HOSPITALITY Stella Meinhardt, Director Leisure Sales
DEUTSCHE LUFTHANSA AG Gabriela Ahrens, Senior Director, Leisure Sales Home Markets (DACH) at Lufthansa Group	DEUTSCHER HEILBÄDERVERBAND E.V. (DHV) Brigitte Goertz-Meissner, President	DEUTSCHER HOTEL- UND GASTSTÄTTEN- VERBAND E.V. (DEHOGA) Ingrid Hartges, CEO
DEUTSCHER INDUSTRIE- UND HANDELSKAMMERTAG E.V. (DIHK) Anne-Kathrin Tögel, Head of Tourism Economy and Tourism Policy	DEUTSCHER REISEVERBAND E.V. (DRV) Norbert Fiebig, President	DEUTSCHER TOURISMUSVERBAND E.V. (DTV) Norbert Kunz, Executive Director

EX OFFICIO MEMBERS

(continued)

DEUTSCHES JUGENDHERBERGSWERK/ HAUPTVERBAND E.V. Oliver Peters, Deputy Chief Executive Officer/ Marketing and Sales	DEUTSCHES WEININSTITUT GMBH (DWI) Monika Reule, Managing Director	ERGO REISEVERSICHERUNG AG Iris Nebbe, Sales Manager/ Head of Tourism in Germany
EUROPA-PARK GMBH & CO MACK KG Rüdiger Büchele, Head of Sales and Tourism	FLUGHAFEN DÜSSELDORF GMBH Eckhard Mischke, Head of Consumer Marketing	FLUGHAFEN MÜNCHEN GMBH Thomas Kube, Head of Marketing and Sales Promotion
FRAPORT AG Susanne D. Schick, Senior Manager, Sales and Customer Service	FRIEDRICHSTADT-PALAST BETRIEBSGESELLSCHAFT MBH Natascha Lecki, Director of Sales & Marketing	GALERIA KARSTADT KAUFHOF GMBH Peng Du, Tourism Marketing
GCH HOTEL GROUP Harald Schäffer, Director of Marketing	GERMAN CONVENTION BUREAU E.V. Matthias Schultze, Managing Director	GERMANIA FLUGGESELLSCHAFT MBH (in liquidation) Vicky Kramer, Marketing Director
GLOBAL BLUE DEUTSCHLAND GMBH Michael Mauerhoff, Marketing Sales Manager	HANSE MERKUR REISEVERSICHERUNG AG Susanne Löbkens, Sales Director	HERTZ AUTOVERMIETUNG GMBH Sven Barth, Head of Leisure Sales
HISTORIC HIGHLIGHTS OF GERMANY E.V. Sascha Mayerer, Managing Director	HOTELVERBAND DEUTSCHLAND (IHA) E.V. Stefan Dinnendahl, Managing Director	INTERNATIONALER BUSTOURISTIK VERBAND E.V. (RDA) Benedikt Esser, President
JCB INTERNATIONAL LTD. GERMAN BRANCH Till Weigl, General Manager	LINDNER HOTELS AG Christian Badenhop, Head of Sales	LUFTHANSA CITY CENTER INTERNATIONAL GMBH Siiri Palisaar, Senior Director Business Development
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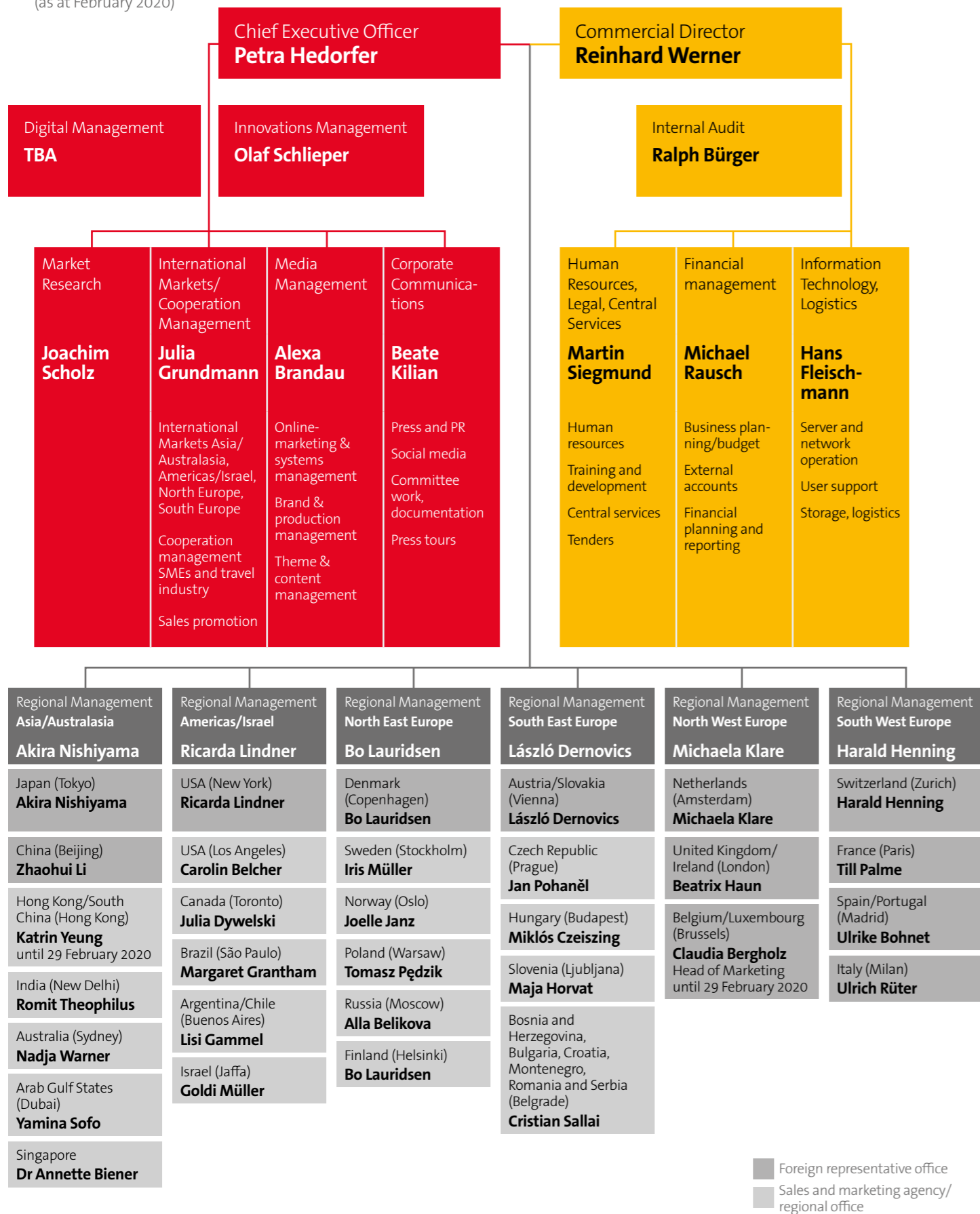
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