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# MAKING TOURISM MORE SUSTAINABLE

2023 PROGRESS REPORT



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INTERNATIONAL  
MARKETING



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DIGITALISATION

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NETWORK AND STAKEHOLDER MANAGEMENT

# DEAR READER,

For many people around the world, there is nothing better than to travel. Which is why Germany must remain an attractive destination for anyone who wants to enjoy our countryside and explore our cities. And one of the most important aspects of Germany's appeal as a travel destination is its unspoilt nature, its coastlines, forests and mountains. So if we want visitors to stay longer, we need both unspoilt green spaces and attractive cities.

In the face of climate change, the tourism industry is confronted with the challenge of enabling climate-friendly travel while protecting the natural beauty and environment of the places that we visit. We urgently need answers to the question of how to make tourism more sustainable.

Tourism can be part of the solution if it makes a significant contribution to greater sustainability while striking a balance between the needs of the economy, the environment and society.

In its coalition agreement, the federal government set ambitious targets aimed at accelerating Germany's push towards achieving the sustainable development goals (SDGs). And the Federal Climate Change Act obliges Germany to become greenhouse-gas neutral by 2045.

The government's 'Future of tourism' platform is the central tool for setting the direction of the national

tourism strategy. For inbound tourism, the GNTB is adding invaluable fresh ideas through its long-term sustainability strategy.

The GNTB's tasks and targets for 2023, set by the Federal Ministry for Economic Affairs and Climate Action, state: "With a clear focus, we can succeed in marketing Germany to the world as a sustainable and green travel destination while unlocking tourism's economic potential for SMEs and for Germany's regions, especially those that are structurally weak. The mission and objective are to embed climate action more firmly in inbound tourism too, including by raising awareness of this among service providers and travellers with the aim of making tourism more climate-friendly.

The GNTB has already enjoyed some great successes. Relevant external bodies have given its internal operations their seal of approval – for example, platinum status as a Green Globe organisation. And by making sustainable tourism a focus of its communication, marketing and sales activities, the GNTB is boosting Germany's international profile in the market for sustainable travel. As a hub for networking and provider of expertise, the GNTB helps its partners in Germany's inbound tourism industry to develop and market sustainable and inclusive offerings.

*“The digital transformation plays a central role when it comes to making tourism more sustainable.”*



**Dieter Janecek, Member of the German Parliament**  
Federal Government Coordinator for Tourism

The digital transformation plays a central role when it comes to making tourism more sustainable. In this respect, the GNTB acts as a driving force for the industry, for example through its 'Digitalisation in Tourism – Open Data and Artificial Intelligence' initiative on the Future of Tourism platform.

The Open Data/Knowledge Graph project enhances the prospects of small and medium-sized enterprises, and of lesser-known regions of Germany, in the international market, improves the visibility of barrier-free offerings and can – with the help of AI-assisted visitor management – reduce the pressure on fragile tourism destinations. These are all tangible contributions to greater sustainability.

I believe the 'Sustainable Travel Trends to Germany' data dashboard is another flagship project for the link between digitalisation and sustainability. It uses precise analyses to establish the status quo, for example in terms of resource consumption, and thus facilitates sustainable business decisions.

Last year, the GNTB's first progress report on sustainability provided a comprehensive review of more than ten successful years of its sustainability strategy. This second edition lays the foundations for meeting the future challenges of standardised sustainability reporting across Europe under the Corporate Sustainability Reporting Directive (CSRD).

We – the industry and the political decision-makers – are on the right path towards more sustainable tourism. Let us continue on this journey together. After all, we only have one planet. More than ever, the focus is on tourism as a major player in bringing about the necessary changes.

I trust you will find this progress report an informative and engaging read.

A handwritten signature in black ink that reads "Dieter Janecek". The signature is written in a cursive, flowing style.

Dieter Janecek,  
Member of the German Parliament



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

*“Anticipating future developments and taking appropriate action is a cornerstone of the GNTB’s sustainability strategy.”*

# DEAR READER,

This is the second year that the German National Tourist Board is publishing a progress report on sustainability. The organisation is thus already meeting the obligations that will arise over the coming years in the wake of the EU's latest legislation.

Anticipating future developments and taking appropriate action is a cornerstone of the GNTB's sustainability strategy.

This report showcases how the GNTB is aligning all of its activities in a transparent and scalable manner with the sustainable development goals (SDGs) adopted by the UN Sustainable Development Summit.

And that starts with our internal sustainability initiative. The environmental team, made up of employees from across all departments, has a clear overview of the day-to-day processes at head office and is able to offer suggestions for optimising them.

The introduction of the European environmental management system EMAS 2024 is the next big step for the GNTB as an organisation.

Elsewhere, major progress has been made with the sustainable implementation of international marketing measures, from upcycling advertising materials to the guidelines for events and for the Germany Travel Mart, which is organised as a green meeting.

Every theme and every campaign through which the GNTB promotes Destination Germany around the world

has been designed to contribute to the sustainability strategy. Of particular note in this context are the 'Simply Feel Good' lead campaign on sustainability, which has won multiple international awards, and the cross-market and overarching 'Stay longer' initiative.

The scope of the GNTB's activities reaches far beyond traditional marketing. As a network organisation and source of expertise, the GNTB supports the German tourism industry – which consists mainly of small and medium-sized enterprises – in its efforts to make tourism more sustainable.

We all know that sustainability is one of the most pressing challenges of our time. This specifically includes international tourism.

The Board of Directors fully supports the Executive Board's work, with the help of its employees in head office and in the markets, to push the topic of sustainability and thus further boost Germany's ability to compete in the international market.

We wish the GNTB every success as it continues on this journey.



Brigitte Goertz-Meissner

# A TALK WITH

Petra Hedorfer,  
Chief Executive Officer  
of the German National Tourist Board

## **This is the GNTB's second progress report on sustainability. What was your conclusion after the first one?**

Our first progress report was a hugely important tool for assessing where we are and where we want to be. We examined all areas of the organisation against the criteria 'strategic targets', 'progress so far' and 'next steps', and determined how each activity supported the achievement of the sustainable development goals (SDGs). In this respect, the first progress report was an interim assessment of more than a decade of sustainability as a key strategic area of action for the GNTB.

This comprehensive analysis, covering all parts of the organisation, provided the foundations for meeting the challenges we now see before us. Despite our successes so far, we cannot rest on our laurels and think that sustainability has a finish line. Instead, we must regularly review our progress in terms of our responsibility to the environment, the economy and society so that we can unlock further potential for improvement.

*“Our brand communications focus on the topic of certification.”*

## **What were the key areas of action derived from the analysis?**

Our sustainability strategy covers the major operational topics in our organisation: business intelligence, network and knowledge management, brand communications and our international activities. These are all closely linked.

For example, our new 'Sustainable Travel Trends to Germany' data dashboard clearly shows the progress we are making with the metric 'increasing the length

of stay'. The dashboard also allows us to put the emissions, including the CO<sub>2</sub>-equivalents, generated by travel from overseas markets, in context with the associated added value. This kind of fact-based transparency brings greater objectivity to the debate and makes it easier to find realistic solutions on which to base marketing decisions.

Our brand communications focus on the topic of certification. The balanced development of supply and demand is closely associated with our extensive links to the international travel trade and tourism in Germany.

*“Striking a balance between the needs of the economy, the environment and society is a global task, and tourism is right at the heart of it.”*

## **Let's take a look at the international context.**

The sustainable development goals adopted at the UN Sustainable Development Summit in New York in 2015 are the main criteria against which to assess progress in all aspects of sustainable business. But the picture at the UN Climate Change Conference in Dubai in December 2023 was rather sobering. More than 180 countries had signed up to the SDGs, yet according to the UN, global progress with implementing them stood at a mere 15 per cent after seven years. Experts agree that the sustainability targets cannot be achieved at the current pace. And that applies not just to the environmental goals but also the social and economic ones.



*“Despite our successes so far, we cannot rest on our laurels and think that sustainability has a finish line.”*

### **Has anything changed about tourism’s contribution to global warming?**

It is important to remember that sustainability is about more than just climate change and global warming. Striking a balance between the needs of the economy, the environment and society is a global task, and tourism is right at the heart of it. Tourism has the power to bring prosperity to the destination countries, and thus enhance the common good by helping to fight poverty. This means social progress for people, and a boost to cultural exchange and understanding among nations. Furthermore, tourism infrastructure that is developed with social responsibility in mind improves the quality of life for the local population. Another social aspect of tourism is accessibility as a contribution to inclusivity.

However, with the impact of global warming becoming increasingly apparent, there is a particular focus on carbon emissions. The German Environment Agency estimates that global tourism accounts for 8 per cent of emissions. The onus is on the international travel industry, just like other areas of the economy, to become more sustainable by significantly reducing its carbon emissions.

### **Recent years have seen some progress, have they not?**

The coronavirus pandemic brought the success story of international tourism to a sudden end. The virtual standstill of international travel offered the climate some



**Petra Hedorfer**  
Chief Executive Officer

respite, but also pushed many tourism companies to the brink. Faced with this situation, the World Tourism Organization launched its ‘build back better’ strategy. Surveys show that both the travel industry and consumers have picked up on this topic.

We are now seeing a very buoyant recovery and are on the up again. Electric-powered transport, the growing share of rail travel and the development of sustainable aviation fuels (SAFs) point in the right direction. But the volume of tourists is also growing strongly again.

*“The German Environment Agency estimates that global tourism accounts for 8 per cent of emissions.”*

**Let’s turn to Europe as the leading source and destination market for international travel.**

**Which aspects are a particular focus?**

In the last few years, many companies and destinations have stepped up their commitment to sustainability. And that includes the tourism sector, which comes as little surprise given that climate change has a clear impact on destinations, travel options and travel behaviour. Major European travel destinations are already experiencing this, with rising temperatures changing the holiday regions on the coast and affecting traditional winter sports resorts in non-Alpine mountain ranges.

Against this backdrop, the European Commission adopted the European Tourism Agenda 2030 in December 2022. It is designed to help member states, public authorities, the European Commission and other stakeholders to make the tourism sector greener, more sustainable and more resilient, while also boosting progress with digitalisation.

*“The aim is for Germany to increase the share of renewable energies to 80 per cent by 2030 and to achieve carbon-neutrality by 2045.”*

**What can we do, and what must we do?**

The political framework in Germany is in place. The aim is for the share of renewable energies to rise to 80 per cent by 2030 and for carbon-neutrality to be achieved by 2045. The cornerstones of the national tourism strategy underline this approach. The basis for action are the SDGs and the European Green Deal, which in 2019 set a target of reducing carbon emissions to zero by 2050. The fact that Germany’s per-capita share of emissions is above-average despite comprehensive initiatives increases the pressure to act. According to the EU’s Emissions Database for Global Atmospheric Research (EDGAR), Germany’s per-capita greenhouse gas emissions were 9.49 tonnes in 2022, putting it in 43rd place globally.

**What are the new tasks ahead?**

A new regulatory framework is now in place that impacts on us and the industry. The implementation of the SDGs and of the European Green Deal, in particular, is giving rise to increasingly transparent and precise rules and regulations, all of which require us and the industry to take action. They point the way for us and provide guidelines for our future practices, from climate action to greater accessibility.

**The sustainable development goals (SDGs) adopted at the UN Sustainable Development Summit in New York in 2015**



## *“Double materiality represents a new approach to reporting.”*

The EU’s new Corporate Sustainability Reporting Directive (CSRD) entered into force in January 2023. Under this legislation, a growing number of companies in the EU are subject to mandatory non-financial reporting on environmental, social and governance (ESG) matters. From 2024, this applies to enterprises listed on regulated markets in the EU and to non-capital market oriented companies with a balance sheet total of €20 million or more, net turnover of €40 million or more, or with 250 employees or more. This means that many medium-sized companies of a size typical for the tourism industry are now subject to mandatory sustainability reporting, not just large corporations.

### **The term ‘double materiality’ is increasingly mentioned in this context. What can you tell us about that?**

Double materiality represents a new approach to reporting that calls on companies to always consider sustainability aspects from two points of view.

For inbound tourism to Germany, this means systematically working to achieve climate targets while boosting competitiveness compared with other destinations.

#### **Outside-in**

Companies are expected to present the main risks and how their products and/or services are affected by sustainability aspects. They are required to report on how these risks come about and how they can be mitigated. Risks can be classified as short-, medium- or long-term. This information should be explained in the non-financial report. The point of view is forward-looking, make it easier to follow a company’s progress.

#### **Inside-out**

This view describes the inverse relationship, namely the impact of the companies’ activities, such as products and/or services, on sustainability. The report should contain information on the impacts, risks and measures related to environmental, social and governance (ESG) matters. As a minimum, it should present information on environmental and social matters, labour rights, human rights and anti-corruption mechanisms.

(Source: cubemos.com)

## *“The SDGs and the European Green Deal point the way for us and provide guidelines for our future practices, from climate action to greater accessibility.”*

### **European Green Deal – key data**

Source: [commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal](https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal)

- Reduce net greenhouse gas emissions by at least 55 per cent by 2030, compared to 1990 levels
- Become the first climate-neutral continent by 2050
- Plant three billion additional trees in the EU by 2030

## The three scopes of the GNTB's holistic sustainability strategy

### Internal sustainability initiative

Reduce and offset internal CO<sub>2</sub>/CO<sub>2</sub>e emissions generally and for marketing activities

### Communicate sustainability

Position Germany internationally as a sustainable destination with green, climate-friendly and inclusive tourism offerings

### Share knowledge externally

Maintain ongoing dialogue with all relevant stakeholders to promote sustainable development along the entire tourism value chain

## Goal: reconcile tourism and sustainability

### How has the GNTB prepared for this challenge?

We have laid the foundations with our three strategic scopes, and this progress report contains examples of implementation for all three of them. The information is presented as a progress analysis and a collection of knowledge, with a focus on transparent sustainability reporting that takes any potential future need for CSRD-compliance into account.

### Which examples of implementation would you particularly mention?

Our new 'Sustainable Travel Trends to Germany' data dashboard shows how digitalisation can directly contribute to the development of sustainable business practices. It combines next-generation data collection and analysis and actively makes the findings available to our national and international network.

Our Open Data/Knowledge Graph project, which went live in 2023, increases the visibility of sustainable and, in particular, accessible offerings while paving the way for innovative marketing models.

The national Travel for All certification system is particularly important in this context. Working closely with the Federal Ministry for Economic Affairs and Climate

Action and the regional tourism organisations, we support the strategic realignment and have made our communication channels available to raise awareness around the world.

The implementation of the EMAS European environmental management system is a major step for our organisation. As well as providing a certification, it also brings transparency to the international market.

Internally, we have appointed sustainability ambassadors across all departments who, as the environmental team, work with our environmental officer on specific projects to increase sustainability at the GNTB. They also provide the structure that enables us to keep all employees involved.

*“Our Open Data/Knowledge Graph project, which went live in 2023, increases the visibility of sustainable and, in particular, accessible offerings while paving the way for innovative marketing models.”*

## How well is Destination Germany positioned in the international market when it comes to sustainability?

It is well-positioned as a travel destination because Germany is as a country in general. In the SDG Index, which measures progress in reaching the UN's climate targets, Germany climbed from sixth to fourth place in 2023. In the Climate Change Performance Index – which is published by Germanwatch, CAN International and the NewClimate Institute, and compares the climate change performance of developed countries, emerging economies and the EU – we were ranked 16th in 2023. And in the Environmental Performance Index (EPI), we were ranked 13th in a comparison of 180 countries.

Furthermore, awareness of Germany as a sustainable travel destination in the international travel trade rose by 2 percentage points to a record high of 79 per cent between the first and fourth quarter of 2023. In the same period, the proportion of CEOs who specifically market Germany as a sustainable destination increased from 59 per cent to 62 per cent (source: GNTB Travel Industry Expert Panel, fourth quarter 2023).

However, we are still seeing a considerable attitude-behaviour gap. According to research conducted by IPK International in September 2023, 73 per cent of travellers stated that a lack of sustainable offerings could be a reason not to visit a destination, but only 29 per cent had booked sustainable offerings before.

*“Our ‘Stay a little bit longer’ initiative, which has been implemented across all campaigns and markets, encourages visitors to extend their stay in Germany and so reduce the per-day carbon footprint of their trip.”*

## What are the next steps to make inbound tourism to Germany even more sustainable?

We are continually expanding our sustainability strategy. In a B2B context, the ‘Sustainable Travel Trends to Germany’ data dashboard provides us and our partners in the travel industry with transparency regarding the emissions generated. This enables us to determine the carbon footprint of international visitors travelling to

Germany, for example. The digital project actively supports the climate-adaptation strategies of tourism destinations and service providers, and helps to make inbound tourism to Germany more sustainable.

In brand communications, the market-specific analysis of customers with values-based lifestyles in the context of sustainability and culture allows for targeted market reach. We are also specifically promoting responsible travel. The ‘Simply Feel Good’ sustainability campaign boosts the visibility of certified sustainable offerings, while our ‘Stay a little bit longer’ initiative, which has been implemented across all campaigns and markets, encourages visitors to extend their stay in Germany and so reduce the per-day carbon footprint of their trip.

Through the complex interaction of market research, marketing, networking and knowledge sharing, the German National Tourist Board is playing its part in making tourism more sustainable and future-oriented.



The GNTB Sustainability Dashboard  
Sustainable Travel Trends to Germany



**ATTITUDE**

**PERCEPTION**



# BUSINESS INTELLIGENCE

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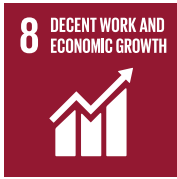
Our Business Intelligence (BI) department collects, reviews, analyses and links data in order to reliably predict market trends. By consolidating high volumes of the latest data from various digital sources, it ensures that the market is reflected with great accuracy.

BI supports the GNTB's strategic decisions for global marketing, particularly with regard to sustainability.

The department also shares its insights with partners in travel to Germany and the international travel industry through various communication channels.

## RELEVANT SDGS

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## GNTB OBJECTIVES

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- Provide tourism-relevant market research as an owner and distributor of knowledge in the tourism sector
- Conduct targeted data analysis based on sustainability aspects
- Identify sustainability-focused target groups in the market
- Share knowledge to support the sustainability activities of the partners in travel to Germany and the international travel industry

## OUTCOMES

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- Data relating to sustainability and climate action available in the GNTB's new 'Sustainable Travel Trends to Germany' data dashboard
- Psychographic segmentation of the way that target groups are addressed by specifically collecting data on the affinities of certain lifestyles for sustainability-related and cultural topics beyond the standard Sinus-Meta-Milieus® indicator
- Expansion of the reporting for GNTB members and SMEs in the tourism sector to include detailed information such as data on seasonality, top travel destinations, reasons for travel, activities and satisfaction

## NEXT STEPS

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- Addition of further relevant data sources to the GNTB's 'Sustainable Travel Trends to Germany' data dashboard
- Introduction of standardised CO<sub>2</sub>/CO<sub>2e</sub> conversion factors
- Definition of the sustainability-focused target group in selected Asian source markets by means of the Sinus-Meta-Milieus®



# Psychographic target group segmentation

## Integration of Sinus-Meta-Milieus® into the marketing mix

The GNTB's holistic sustainability strategy and its global marketing are adapting to changing travel behaviour and consumer values. Research by the Sinus Institute further shows that sustainability is increasingly fundamental to the way that many different types of people live their lives. Authenticity, mindfulness and an interest in cultural values are becoming ever more important.

To better target potential customers with a strong interest in sustainability, the GNTB has worked with the Sinus Institute to establish travel-related values – in the context of sustainability and culture – in 25,000 interviews across 19 countries.

Information on travel behaviour was included in the survey questions for this purpose. The analysis revealed

that the key milieus and future milieus were particularly invested in sustainability. The key milieus are 'Intellectuals, Established and Performers' and the future milieus are 'Cosmopolitan Avantgarde and Progressive Realists'.

By addressing milieus with an interest in sustainability, the GNTB can reach target groups who are keen to minimise the climate impact and social impact of their trip.

Country reports based on the Sinus-Meta-Milieus® survey are made available to the GNTB's partners so that they can incorporate sustainability aspects into their targeted marketing.



## Collection and analysis of data

### The GNTB's 'Sustainable Travel Trends to Germany' data dashboard includes specific sustainability parameters

Measuring and monitoring play an important role in the analysis and optimisation of

- workflows in head office and the GNTB's 25 foreign representative offices,
- the GNTB's global marketing activities,
- and the total environmental impact of global tourism to Germany.

Accordingly, we are systematically and comprehensively defining key figures for the entire value chain in inbound tourism to Germany. The figures are continuously measured using digital data sources and then presented as part of a detailed monitoring process.

To this end, the GNTB has developed an innovative data dashboard called 'Sustainable Travel Trends to Germany'. With its focus on the environment, it complements the 'Inbound Travel Trends Germany' dashboard, which displays key market-specific indicators from an economic standpoint and was launched in October 2021.

The new dashboard provides users with detailed information from three perspectives. First, it examines the general attitude of consumers in source markets with regard to sustainability, climate action and interest in sustainable travel. Second, it looks at the perception of Germany as a sustainable destination and its positioning in the European competitive arena. And third, it analyses the actual travel behaviour with regard to sustainability, for example the relevance of multi-destination tours, length of stay, tourism density and the CO<sub>2</sub>-equivalent emissions from transport

This comprehensive base data is available to decision-makers in the Federal Ministry for Economic Affairs and Climate Action, within the GNTB, and to the GNTB's partners, in particular the regional tourism organisations and the members of the Magic Cities and Historic Highlights marketing associations.

#### The focus here is on the following key figures:

- Germany's progress towards achieving the SDGs
- General interest in sustainability/sustainable travel in Germany's source markets
- Perception of Germany as a sustainable destination
- Status quo and trends in length of stay of visitors from source markets
- Status quo and trends in multi-destination tours
- Monitoring of CO<sub>2</sub>/CO<sub>2e</sub>-relevant indicators for inbound tourism
- Volume of arrivals from source markets
- Distance (central point)
- Volume of arrivals
- Volume of multi-destination tours
- Average length of stay
- Tourism density/intensity

The key figures from the GNTB's two data dashboards reflect the three dimensions of sustainable tourism:

## ECONOMY

includes data on arrivals, modal split, overnight stays, spend/passenger arrivals by air, rankings, changes etc.

## ENVIRONMENT

includes data on seasonality, length of stay, European multi-destination tours/monthly trends in the length of stay of passengers arriving by air etc.

## SOCIAL

includes tourism density/intensity/overnight stays per square metre by source market etc.



## Measurement of CO<sub>2</sub>e – emissions factored into marketing decisions

In addition to CO<sub>2</sub> emissions, the GNTB now also factors in the more comprehensive CO<sub>2</sub>-equivalents (CO<sub>2</sub>e) as these include other greenhouse gas emissions such as methane and nitrous oxide.

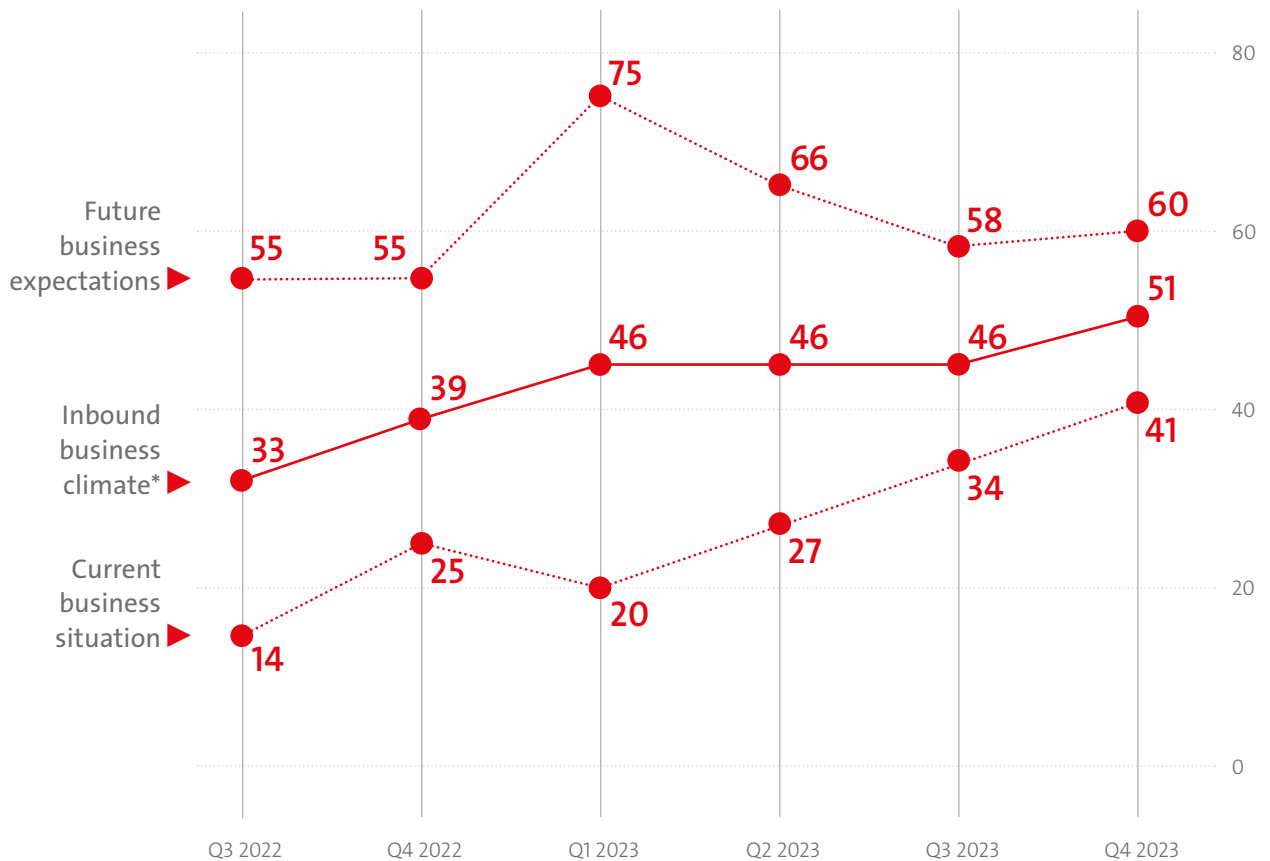
The GNTB uses the expanded data pool specifically for sustainable strategic decisions by the Executive Board, in its brand communications and when advising international and German partners on products.

Emissions generated by travelling to Germany from the source markets are presented in relation to the length of stay and amount of money spent in the destination.

The GNTB uses the data to make strategic decisions for its sustainability programme. For example, the source markets in which the ‘Stay longer’ campaign was run were selected in part using these emissions criteria.

## Sharing of knowledge with the tourism sector

GNTB Travel Industry Expert Panel – the business climate for inbound tourism is brightening thanks to the ongoing improvement in the current business situation and an end to the downward trend in future business expectations.



\* The inbound business climate is the combined balance of the current business situation and the future business expectations of international experts in inbound tourism to Germany, value range: +100 to -100. Source: GNTB Travel Industry Expert Panel. The experts are international CEOs and buyers (tour operators, travel agents and online travel agents). Q1 2022–Q4 2023 (213–262 respondents), July, October 2022 and January, May, August, November 2023.

## GNTB Travel Industry Expert Panel

The Expert Panel is a completely independent survey conducted by the GNTB on a quarterly basis among CEOs and key accounts of companies in the international travel industry that sell Germany as a destination.

The GNTB determines the business climate index from the respondents' assessments of their current business situation and their forecast for the next six months.

In addition to general business trends, the survey also includes questions about aspects relating to climate action. Recent responses have demonstrated a steadily

# 260

experts

take part in the GNTB Travel Industry Expert Panel every three months

growing interest in sustainable travel behaviour among customers, while the international travel trade is also increasingly viewing Germany as a destination for sustainable travel, and actively marketing it accordingly.

### Sustainable product bookings on the up

# 79%

of international experts

promote Germany as a sustainable destination. An increase of 2 percentage points compared to the first quarter of 2023.

# 62%

Q4 2023

*A growing number of international CEOs and key accounts expect bookings of sustainable products to rise over the next three years.*

# 59%

Q1 2023

Source: GNTB Travel Industry Expert Panel, survey in Q1 2023 and Q4 2023 (213–236 respondents).

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+1  
0  
-1  
-2





# INTERNATIONAL MARKETING

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Making inbound tourism more sustainable is the key strategic objective of the GNTB's global marketing activities for Destination Germany. To further boost the aspect of sustainability as a USP in the core brand, and thus maintain Germany's strong position as a sustainable travel destination in the international market going forward, the GNTB analyses all global and market-specific international activities for their potential contribution to this specific personal value and aligns its theme-based campaigns accordingly.

## RELEVANT SDGS



## GNTB OBJECTIVES

- Place the importance of climate action and environmental protection in tourism at the heart of marketing activities
- Increase the visibility of socially and environmentally sustainable offerings
- Encourage longer stays
- Specifically promote green, climate-friendly travel
- Use suitable imagery to focus attention on Germany's climate action and shift to green energy
- Green marketing: consider sustainability aspects when running marketing activities and in live communications

## OUTCOMES

- Global marketing systematically focused on sustainability aspects
- Global campaigns focused on sustainable tourism
- Imagery used that shows Germany as a country taking climate action
- Advertising material produced and used in line with the GNTB's sustainability strategy
- Marketing activities promoting sustainable tourism stepped up in international source markets
- Sustainability aspects implemented in travel and events, and disclosed transparently

## NEXT STEPS

- Continue the global 'Simply Feel Good' sustainability campaign promoting Germany and its certified sustainable offerings
- Continue the global '52 UNESCO World Heritage Sites' campaign aimed at inspiring travellers to take a sustainable trip to Germany's many UNESCO sites and thus increase their length of stay
- New: 'Cultureland Germany' global campaign promoting Germany as an arts and culture destination with many sustainable offerings
- Continue the 'Stay longer' initiative, including using song and videos to encourage people to stay longer and travel out of season
- Further expansion of marketing activities for sustainable tourism in the GNTB's international source markets as part of another pitch project



## Highlights in 2023

### Global campaigns focused on sustainability aspects

Germany already enjoys a strong international reputation for sustainability. For example, the country climbed from sixth to fourth place in the 2023 SDG Index and consolidated its top ten ranking in the Anholt-Ipsos Nation Brands Index (NBI). This is also reflected in the perception of Germany as a travel destination. According to an IPK International survey commissioned by the GNTB, Germany ranks third behind Sweden and Switzerland for its green and sustainable tourism offerings.

In order to further enhance Germany's brand profile as a sustainable destination in the international market,

the GNTB analysed all aspects of the content and delivery of its global campaigns in 2023 in terms of their relevance to sustainability and adapted the campaign messages accordingly.

Specific goals are and remain: reducing the greenhouse gas emissions generated by inbound tourism, extending the length of stay, smoothing out the flow of visitors by encouraging off-season travel, promoting tourism in rural regions and supporting green cities.





## Simply Feel Good

A large number of credible and high-quality sustainable tourism offerings are available across Germany. The aim of the Feel Good sustainability campaign, which was relaunched and expanded in 2023, was to increase the visibility of this sustainable tourism. The campaign also showcases specific travel ideas that demonstrate how easy, convenient and straightforward it is to explore Germany the sustainable way. This was emphasised by expanding the campaign slogan to 'Simply Feel Good'.

The offerings chosen for the campaign show how a holiday to Germany can combine sustainability, the finer things in life and all manner of experiences and discoveries. They also reflect the growing number of tourism regions, hotels, tour operators and transport companies that are focusing on sustainability.

### Campaign KPIs

**64**  
million impressions

through programmatic  
marketing

**100**  
million impressions

via social media marketing

**1**  
million views

for the microsite

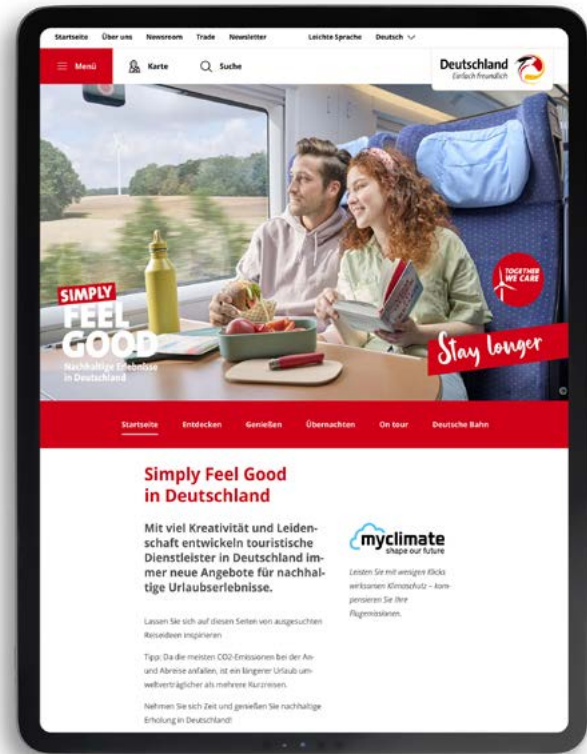
### Campaign set-up

- Landing page at [www.germany.travel](http://www.germany.travel). This hub for information and inspiration showcases around 140 certified travel ideas selected from submissions across Germany
- The four clusters 'Discover', 'Enjoy', 'Stay overnight' and 'On tour' make it easier to navigate the offerings
- Maps of Germany that link to other sustainable travel ideas on the relevant web pages of the 16 federal states, and to accommodation certified by recognised sustainability schemes
- Target groups matched to the Sinus-Meta-Milieus® that represent a particularly sustainable way of life – focus on Intellectuals
- Integration of a carbon calculator for travel by air or car, with the option to offset directly via myclimate
- Integration of Deutsche Bahn as a Premium Partner

**140**  
sustainable travel ideas

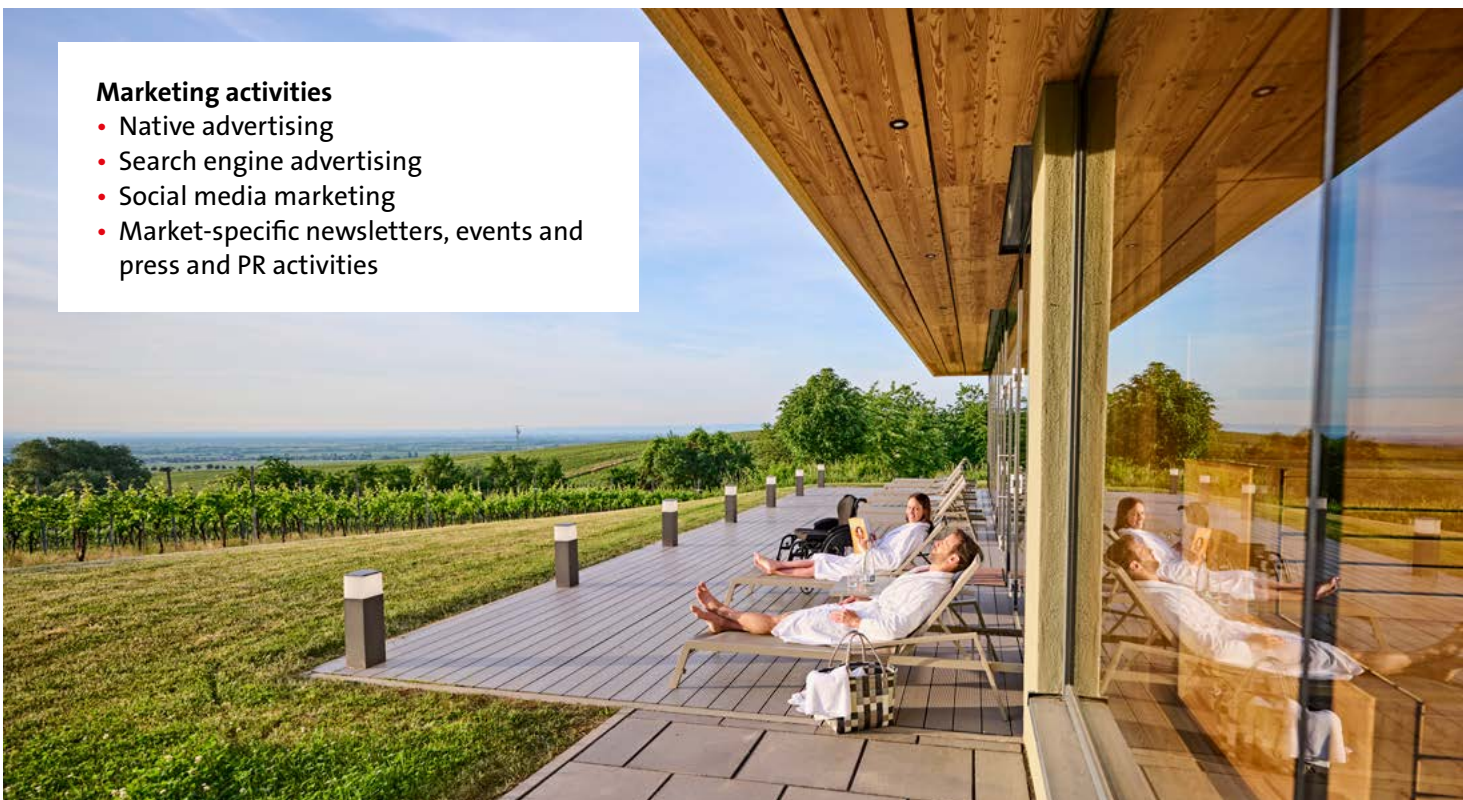
**22**

recognised certifications,  
including Bio-Hotels, Dehoga-Umweltcheck,  
Green Globe, Green Sign, TourCert



### Marketing activities

- Native advertising
- Search engine advertising
- Social media marketing
- Market-specific newsletters, events and press and PR activities



## Stay a little bit longer

Extending the stay of international visitors to Germany has a number of effects that contribute to the achievement of sustainability targets. First, the economic value added created by the visitors is higher. And, as the greenhouse gas emissions generated by travelling are spread over more days, the ecological footprint per day of travel decreases. Extended stays increase the likelihood of mixed holidays, such as city breaks combined with a stay in the surrounding area, and thus help to boost tourism in rural regions. Offers that encourage a longer stay also make travel in the low season more attractive, which has a positive impact on year-round employment. This in turn improves the quality of service and provides more job security to workers.

# 7.0

nights\*

Average length of stay of international visitors to Germany in 2023. 2019: 6.7 nights

# 9.0

nights\*\*

Length of stay of visitors arriving by air in 2023. 2019: 8.3 nights

For customers, this means allowing more time, viewing the journey itself as part of the holiday and travelling sustainably. This leaves time and space for a more intense experience in the destination and encounters with locals, as well as the opportunity to learn about traditions and discover amazing towns, cities and beautiful natural landscapes.

The GNTB launched the global ‘Stay a little bit longer’ initiative in 2023 to raise awareness of the opportunities for extending the length of stay. The slogan and the campaign visual are used in all marketing activities around the world.

Sources: \* IPK International World Travel Monitor 2023; \*\* Forward Keys 2023.

## Main social media campaign

A high-reach social media campaign with cut-out clips ran on Meta channels and YouTube in twelve markets.

12  
markets



13  
million  
video views

196  
million  
impressions



## Sustainability campaigns around the world

The GNTB called on all of its foreign representative offices and sales and marketing agencies to pitch their own ideas for promoting longer stays specifically in their markets. All international GNTB offices submitted ideas, in some cases as a group. Ten projects were selected by head office based on an assessment matrix and their individual merits, and then implemented in the markets.

### DENMARK

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**Germany as a workation destination.** A workation combines working and a holiday, and is a trend that is increasingly popular among people who work remotely. In Denmark, Germany is primarily considered a destination for short breaks, but a workation can make Germany more appealing for a longer stay. With this in mind, GNTB Denmark produced eight videos on specific themes and created a workation microsite that successfully inspired Danish end customers.

**48** thousand clicks  
on the microsite



**7** million impressions  
on social media



**17**  
million contacts reached

### POLAND

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**Addressable TV advertising promotes more days on holiday.** Personalised TV advertising on smart TVs combines high reach and broad visibility with digital targeting. It involves showing personalised advertisements that are tailored to the viewer's specific characteristics. In the TV ads, the GNTB encouraged people to use 'bridging days' between a public holiday and the weekend to enjoy a longer stay in Germany.

**2**  
million  
broadcasts

## UNITED KINGDOM

**Creative DOOH advertising at Piccadilly Circus.** The GNTB presented Caspar David Friedrich's painting 'Wanderer above the Sea of Fog' on Europe's largest digital advertising space. Thanks to the 3D effect, the painting whisked passers-by away on a journey to the Germany of Romanticism. The goal was to use the 250th anniversary of the birth of Caspar David Friedrich in 2024 to promote Germany as a cultural travel destination, as well as its rural regions. Furthermore, to encourage longer stays that combine museums, exhibitions and experiences in the great outdoors. The impressive placement and memorable content reached travellers with an interest in sustainability.

**11.6** million views



## NORWAY/SWEDEN

**Around Germany in 80kg of CO<sub>2</sub>.** The campaign was designed as a challenge in which four groups of travel influencers from Sweden and Norway faced off with the aim of enjoying their dream holiday in Germany with the smallest possible carbon footprint. The route incorporated travel ideas from the Feel Good campaign. The trips and the experiences along the way, as well as the carbon emissions generated, could be followed on social media and on a dedicated microsite.



**1.68** million impressions for display ads

**4,700** page views in three weeks



## BELGIUM

**Focus on rail travellers.** At sustainable travel hubs in two Belgian train stations, accompanied by large-format OOH advertising, passers-by were invited to put together and download a digital travel guide. In cooperation with the Belgian organisation 'go forest', a tree was planted in Germany for every download.



**5,000**  
trees planted

## FRANCE – ITALY – SWITZERLAND – SPAIN



Influencers in front of Stralsund town hall

**Three online platforms, one goal: sustainability.** The multi-stage campaign initially provided inspiration and raised awareness through posts by influencers in the markets, each with a swipe-up function to the leading online travel portals as booking platforms. The call to action placed there contained a discount code for bookings of at least four nights, thus providing an incentive to extend the length of stay. The sustainability aspect of the offers was rounded off through the inclusion of carbon offsetting.

**5** million page impressions  
for display ads

**26**  
thousand clicks  
on social media

**57**  
thousand views  
on the microsite

## BALKANS

**Green German Days.** The GNTB used a mix of unusual online and offline activities to draw attention to Germany as a travel destination in the high-growth markets of Romania and Serbia. For example, a cinema in Bucharest accepted recyclable plastic bottles as payment for admission as part of the Germany campaign. A video about Germany as a travel destination was also shown before the film, inviting people to take part in the two-day B2C event in the centre of Bucharest. At the same time, the GNTB ran an online and OOH campaign in cinemas and metro stations in Bucharest, Belgrade, Novi Sad and Niš.

**18** thousand plastic bottles collected in Bucharest and Belgrade and handed over to specialist recycling companies



**15-18**

kg of CO<sub>2</sub> absorbed

by the plant-covered green wall in the events area



## CZECH REPUBLIC

**Cross-media storytelling campaign.** In the Czech Republic, the GNTB promoted the 'Stay a little bit longer' initiative through cinema advertising. The campaign included backlit billboards in front of the cinemas and pop-up events in the cinema lobbies featuring the innovative Nature Experience in Germany VR app. Other features included a HyperCube with a solar panel and battery for sustainable mobile phone charging, and a messenger bot that took cinemagoers on a virtual sustainable trip to Germany that provided inspiration for a longer stay.

**18**

locations showing the video

**12**

million contacts via OOH and cinemas

**4.2**

million impressions on social media

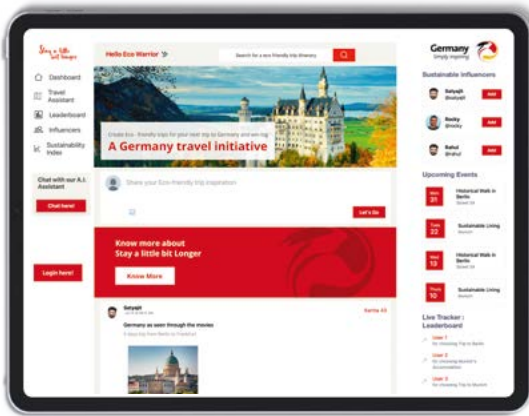


## SERBIA

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**German Green Week Belgrade – sustainability-themed campaign in June 2023.** The GNTB's Serbia office sponsored the Green Week in the capital, Belgrade. It organised:

- Events focused on the topics of sustainability and green tourism in the botanical garden
- Presentations on sustainability for pupils at the German School
- A joint closing event with the SUPERNATURAL eco project, which organises sustainability initiatives in Serbia, the botanical garden and the German School in Belgrade's GAIA project, which focuses on urban beekeeping



## INDIA

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**Gamification as the key to slow travel.** The 'Slow Summer' communication campaign used an interactive slow-travel dashboard to promote Germany to leisure travellers from India. The initiative was supported by programmatic ads on social media. A dedicated social media platform for sharing sustainable travel options in Germany enabled users to find inspiration and collect 'karma points' to see who had travelled the most sustainably.

More than

# 7,500

interactions

with the gamified  
'Slow Summer' dashboard

More than

# 26

thousand interactions

on the 'Stay a little bit longer'  
dashboard

# 1.5

million impressions

of programmatic ads

## DUBAI

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**Travel Audience campaign with precise targeting.** The GNTB used booking data from the Amadeus booking system for its data-driven programmatic ad campaign in collaboration with Travel Audience. This allowed for travellers from the region who, according to their Sinus-Milieus classification, are already interested in longer stays to be filtered out and targeted with specific offers. On the inventory side, ad hoc deals were concluded with a list of selected publishers based on industry and content. These deals were then bundled into five packages that matched the target groups' requirements. A geolocation tracking function enabled precise measurement of the results.

Over

# 50

million impressions

across the three-month campaign, with 441,162 clicks  
and a click-through rate of 0.88%

Over the following four weeks, 107,680 conversions were identified via OTA bookings and geolocation tracking, which means that 107,680 people who clicked on the advertisement actually visited Germany (many accompanied by others, making a total of 226,128 people).



## 51 UNESCO World Heritage Sites

### Discovering Germany's World Heritage sites the sustainable way

Germany is home to an incredible number of UNESCO World Heritage sites, both natural and cultural, with few other countries boasting more. The GNTB's '51 UNESCO World Heritage Sites' campaign specifically addressed travellers' desire for memorable, authentic and sustainable experiences in the city break and culture segment, including excursions to rural areas. By integrating the 51 World Heritage sites into eight themed routes that could also be tackled by public transport, the campaign focused on extending visitors' length of stay and reducing their carbon footprint.

The campaign was supported by new augmented-reality filters on social media, which encouraged the

use of digital innovations. It also raised awareness of heritage preservation and the need to protect UNESCO World Heritage sites, and provided a boost to urban and rural areas. Furthermore, the GNTB's small and medium-sized partners benefited from the high reach.

Filter for UNESCO-listing anniversaries in 2023:

- Town of Bamberg – 30 years
- Classical Weimar – 25 years
- Bergpark Wilhelmshöhe – 10 years

Investment and Marketing Corporation Saxony-Anhalt was the Premium Partner for the campaign.

51

UNESCO WORLD HERITAGE SITES

Historic.Modern.Germany.

50  
thousand  
people used  
the AR filters

## Embrace German Nature

### Focus on amazing natural landscapes

As the second-most popular nature-based travel destination for Europeans, according to IPK International, Germany is well-placed to attract nature lovers interested in sustainable holidays. The GNTB grasped this opportunity with the 'Embrace German Nature' campaign, through which it promoted authentic, individual experiences of the country's natural highlights, and encouraged travellers to explore some of its lesser-known regions. The campaign was run in collaboration with Investment and Marketing Corporation Saxony-Anhalt.

The campaign concept focused on sustainability and climate-neutral travel as well as on slow travel and extending the length of stay.

Creative content, including a promotional video and other videos featuring 8D sound, was incorporated as a central element on a microsite. A cross-media approach was taken that included search engine marketing, programmatic marketing and social media marketing.

### KPIs for Embrace German Nature

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**117**

million impressions

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via social media marketing

**127**

million impressions

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via programmatic marketing

**43**

million impressions

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via Google Display Network



# Season's Greetings from Germany



## Christmas 2023

### Opportunities beyond the summer high season

Germany's Christmas customs and traditions are known around the world. In its Christmas campaigns, the GNTB picks up on this popularity in order to inspire potential visitors to travel to Germany during the festive season as well.

International visitors who enjoy Christmas markets and winter activities are a major driver in the city break and

cultural travel segments, and provide a welcome boost to the hotel industry, the restaurant trade, retailers and cultural institutions. This spreads tourist volumes across the year and ensures that capacity utilisation in the hotel industry is more balanced. The inclusion of urban and rural areas encourages longer stays and provides a boost to rural regions and to inbound tourism outside of the high season.

### KPIs for Christmas

**24**  
million  
impressions

via social media  
marketing

**377**  
thousand  
link clicks

via social media  
marketing

**21**  
million  
impressions

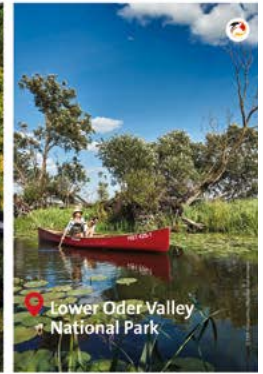
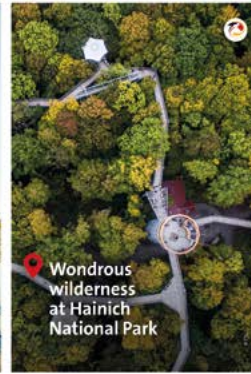
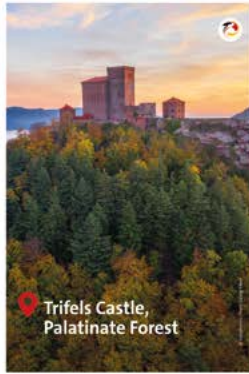
via programmatic  
marketing

**370**  
thousand  
page views

on the  
microsite

## Social media marketing

The organic posts on the social media channels Facebook, Instagram, Twitter (now X) and Pinterest regularly have sustainability as a topic. The content is either packaged in interactive formats, such as Instagram Stories, or informative videos are created that invite the community to join in.



Over **240**  
posts

**63** thousand  
interactions

Over **1.6**  
million impressions

## Climate-neutral mobility in 2023

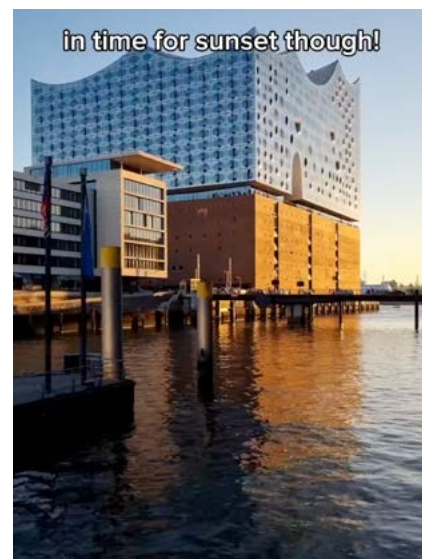
The GNTB's main influencer campaign 'Climate-neutral mobility in 2023' raised awareness about the topics of electric-powered transport, the shift to green energy and slow travel. It showcased green travel to and from the destination, and alternative energy sources such as hybrid drives and hydrogen. The campaign was split into a northern and southern route, with each exploring a topic in greater detail along the way.

**2.5**  
million  
impressions

via social media  
marketing

**1.1**  
million  
interactions

via social media  
marketing



## Green marketing

In addition to aligning the content of its marketing campaigns with aspects of sustainability, the GNTB also endeavours to deliver the campaigns responsibly.

### Advertising materials

#### Advertising materials in keeping with the GNTB's sustainability strategy

The GNTB's advertising materials are always developed and produced in accordance with the principles of up-cycling. For example, banners, flags and other materials from previous events are repurposed as new promotional items, such as bags, document holders and key rings, in order to conserve resources. All other promotional items, such as insulated water bottles, are produced in line with defined sustainability standards.

#### Sustainable printed products

We are gradually reducing the use of printed media, and thus the energy and resources consumed in their production. Smaller print runs save on paper and reduce the carbon emissions generated by distribution. Our current publications are all printed in accordance with the criteria of the German Blue Angel certification. Where possible, electronic media replace the physical publications.



#### Raising awareness through imagery

The GNTB raises awareness of sustainability through the imagery it uses in its external communications, from online and social media to print publications. Further photo and video shoots were commissioned in 2023 in order to maintain a suitable pool of images. The results of these productions, some of which were completed in partnership with the destinations, are available for use in all campaigns.

### Live communications

Workshops, roadshows, seminars and PR and sales events are a central pillar of our B2B communications with the international travel trade and the partners in inbound tourism to Germany.

Some of these events are now offered online, which eliminates the greenhouse gas emissions generated by participants travelling to them. Nevertheless, face-to-face meetings and experiencing Germany as a travel destination in person are essential when it comes to marketing our country.

A multitude of measures aim to reduce the environmental footprint of in-person events.

A balanced scorecard provides the basis for designing and analysing events, and drawing conclusions. The results are an integral part of digital performance monitoring.

#### Examples of applying sustainability to event designs

- Trade fair stand modules, for example for workshops, are always used more than once
- Use of sustainable materials
- Stickers for lecterns and glass panels made with eco-friendly materials and glue
- Where possible, items such as roller banners and canvases feature images that can be used at subsequent events
- Any banners, canvases and flags that cannot be reused are upcycled into promotional items
- Bulk deliveries from suppliers to the event venues

## Sustainability aspects taken into account in influencer tours and fact-finding tours for the media and the international travel trade

The GNTB organises fact-finding tours for journalists and influencers, either as group or individual tours, to give them an authentic, first-hand experience of Germany's sustainable tourism offerings. This then results in extensive publicity abroad.

The integration of sustainable products and services, from travel and accommodation to excursions and catering, strengthens Germany's positioning and credibility as a destination for sustainable and inclusive tourism. A guideline provides the GNTB's markets with detailed information on planning and running sustainable fact-finding tours.

As a rule, the greenhouse gas emissions generated by the flights of employees and invited guests are offset through atmosfair.

# 226,844

kg of CO<sub>2</sub>

from flight emissions were offset by the GNTB during the 2023 Incoming & Brand Summit

### Extract from the GNTB guidelines for fact-finding tours

#### Programme design in the destination:

- Regional initiatives, small local producers
- Regional economy
- Use of new technologies/tourism offerings (e.g. the new solar-powered boat on Lake Constance)
- Accessible offerings
- Diversity: projects and offerings relating to culture, accommodation and eating out that contribute to intercultural understanding and greater tolerance (e.g. LGBTQIA+)
- Offerings that preserve the destinations' socio-cultural authenticity, cultural heritage and traditional values, for example the UNESCO World Heritage sites (natural and cultural), intangible cultural heritage, examples of traditions and customs such as farm shops and hand-blown glass art
- Projects that help to use natural resources efficiently, maintain important ecological processes (e.g. meadow orchards) and increase biodiversity (e.g. protected natural landscapes)

#### Selection of hotels and other accommodation:

- Sustainable certifications, including
- Green concept for cleaning and laundry services
  - Use of renewable energy
  - Where possible, food and beverage from local producers and/or organic/fairtrade
  - Public transport offers/visitor cards
  - Cycle hire
  - Resource-efficient use of food and drink
  - Commitment to sustainability in the region

#### Selection of food and drink suppliers:

- Use of regional and seasonal products and producers, short supply chains
- Choice of organic products, highlighting of sustainability certification (e.g. how fish was caught)
- No-waste/low-waste initiatives, e.g. for the homeless, people in need or schools
- Availability of vegan and vegetarian food

Stay a little  
bit longer

ACCESSIBLE TRAVEL

BARRIER-FREE DESTINATIONS  
IN GERMANY



www.leichter-reisen.info





# ACCESSIBILITY

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The GNTB promotes accessible travel internationally as an overarching theme that is a key facet of the Destination Germany brand and a priority in the German government's tourism policy.

Accessibility is a sign of quality for destinations, and not just because it helps people with disabilities, but also because it offers more convenience for everyone.

Additionally, there are positive economic effects. Visitors are more likely to return if accessibility was good and to spread the word to others in their community, while people with disabilities often do not travel alone, but with a companion, with a carer, or as part of a group.

## RELEVANT SDGS

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## GNTB OBJECTIVES

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- Foster community-building around the world through communication with stakeholder groups in the markets, networking with international partners and collaboration with disability organisations
- Position Germany as a model inclusive destination through better visibility of the various barrier-free offerings among visitors, trade partners and journalists
- Ensure online and offline marketing activities meet accessibility requirements
- Make partners and their employees aware of the need for, and requirements of, accessible tourism

## OUTCOMES

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- Further strengthened accessibility expertise at national and international level by means of newsletters, presentations and events
- Delivered Accessible Tourism Day as an online event in 2023
- Improved accessibility of communications across all channels used by the GNTB
- Further expanded network of experts through partnership with the German Disability Council's new tourism working group

## NEXT STEPS

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- Support the organisational realignment of the Travel for All database
- Further improve accessibility in GNTB communications
- Produce new imagery
- Organise Accessible Tourism Day as a hybrid format at the 2024 ITB
- Run trade workshops in international source markets and for German partners to present accessible products and services
- Organise GTM pre-convention tours, press trips and market-specific influencer trips and fact-finding tours on accessible tourism in Germany

# Highlights in 2023

## Accessible Tourism Day at the ITB

Accessibility is a key success factor in the international travel market. It requires suitable infrastructure, trained, empathetic staff and reliable, appropriate communication. Even though Germany already has a wide variety of accessible offerings in cities and rural areas, there is still plenty of room for improvement. This was reflected by Jürgen Dusel, Federal Government Commissioner for Matters relating to Persons with Disabilities, in his opening speech at the 11th Accessible Tourism Day, when he emphasised how important this event still is today.

During the 11th Accessible Tourism Day on 17 March 2023, the GNTB brought together decision-makers in government and the tourism industry, and the representatives of interest groups and associations, to discuss the opportunities and challenges inherent in the development of accessible offerings, and to present standout examples of inclusion in tourism.

550 delegates took part in the online event. The GNTB ensured accessibility with simultaneous interpreters (German/English), sign language interpreters and captioners, and broadcast a live feed of the event on social media.

During the opening ceremony, Dieter Janecek, Member of the German Parliament and Federal Government Coordinator for Tourism, said: “People with and without disabilities should have equal access to holidays and leisure activities, and should all enjoy worry-free travel.

The Federal Government strongly supports initiatives to develop and professionally market inclusive tourism.”

André Nowak, spokesperson for the German Disability Council’s tourism working group, called for comprehensive accessibility across the tourism infrastructure, and for suitable measures aimed at gradually removing existing barriers and preventing new ones.

Keynote speaker Rhiannon Parker (USA), Chief Innovation Officer at The Valuable 500, highlighted the need to view accessible travel as a key contributor to the economy and tap into its huge potential in this regard.

Below are the topics of the discussions and panels with German and international experts:

- More accessibility – but how? The responsibility of architects and those who build and operate buildings and spaces
- People with disabilities as employees – also a key to greater accessibility?
- People with care needs and their friends and family – a neglected target group
- Mobility on demand as a key element of the shift to greener transport: advantages and disadvantages for people with disabilities
- Special Olympics World Games – a boost for Berlin as a destination



Broadcast of the 2023 Accessible Tourism Day with host Daniela Wiesler (bottom left) and the two sign language interpreters (above) during Dieter Janecek’s opening statement

## VR app wins award at Zero Project Conference

The GNTB took part in the Zero Project Conference at the United Nations in Vienna. With more than 1,000 participants, it is one of the world's largest conferences on accessibility.

Among other things, the GNTB presented its Nature Experience in Germany VR app, which was developed with accessibility in mind.

Due to the positive response, the GNTB was invited to present this virtual world as the 'most innovative solution' to a team of international experts at the Technology Forum. The panel included the World Bank, the

World Health Organization (WHO), the International Telecommunication Union, the European Commission and companies such as UniCredit, Microsoft, Apple, Google, Cisco, AT&T and Atos.

For a World With Zero Barriers

# #ZeroCon23

February 22-24, 2023

Independent Living & Political Participation, and ICT



## Reviewing the accessibility of corporate communications

The GNTB wants to provide barrier-free communications across all its channels, and has had the accessibility of its analogue and digital communications audited by experts.

Below are the national and international laws and guidelines to which the GNTB takes a proactive approach to compliance:

- Germany's Disability Discrimination Act (BGG)
- Germany's Federal Ordinance on Barrier-Free Information Technology (BITV 2.0)
- The Web Content Accessibility Guidelines (WCAG 2.1)
- The Accessibility Strengthening Act (BFSG, comes into force in 2025), Germany's law implementing the European Accessibility Act

Regardless of these legal frameworks, we want all of our customers, partners and other stakeholders to be able to follow our content. We want to avoid access being limited where a disability means that communication tools and advertising materials are only partially usable or readable.

The focus here is not on the main GNTB website, [www.germany.travel](http://www.germany.travel), which is already largely barrier-free. Instead, it is on all the other communications channels, which also need to incorporate accessibility – from analogue advertising and newsletters, survey tools and event management systems to social media, chatbots and virtual reality.

We are working through the audit's findings in order to improve accessibility, and internal workshops and training courses are offered to support this.

## Networking to promote accessible tourism

The GNTB is involved in committees with the aim of improving product development and quality, and showcases Destination Germany at national and international events in the accessible travel segment.

To this end, it maintains a regular dialogue with its sponsor the Barrier-free Destinations in Germany Association, the Tourism for All regional working group, the

German Disability Council's tourism working group and, at international level, the European Network for Accessible Tourism (ENAT), among others. Alongside the work of head office, the GNTB's local representative offices provide information about accessible offerings in Germany to interest groups, tour operators and multipliers in their markets, organise workshops and issue invitations to fact-finding tours in Germany.





Benedictine abbey of St Mauritius in Tholey

## Visibility of accessible tourism offerings

### Travel for All

Travel for All is a Germany-wide certification system that offers very detailed information and images about the accessibility of tourism-related facilities and services, including accommodation, attractions, walking trails and cycle paths, transport and more. The GNTB worked with the government and federal states on restructuring the system in 2023.

Under the new structure, the GNTB ensures that the data collected is made available via its website and will be integrated into the Knowledge Graph going forward. As a result, the data can also be identified and used by AI-driven assistance systems. This will boost the pro-

*The GNTB supports the restructuring of the Germany-wide Travel for All certification scheme*

motion of accessible travel as a key facet of the Destination Germany brand in international marketing. It also allows the GNTB to send a clear signal that digital transformation and socially responsible tourism go hand in hand.

## Trade and influencer tours

During its fact-finding tours for the travel trade and for influencers, the GNTB presents the types of accessible tourism and services that are already available in Germany. The participants' feedback helps to assess progress and provides suggestions for improvement for the partners involved.

### Barrier-free tour – history meets future

How do people who are blind or partially sighted explore Cologne Cathedral? What does it mean for people with limited mobility, impaired hearing or other cognitive impairments to visit the German Football Museum? And what interactive experiences for people with a range of impairments await at the visitor centre at the heart of Eifel National Park? These and other questions were answered during the 'Barrier-free tour – history meets future' trip around North Rhine-Westphalia with seven international journalists.

One of the pre-convention tours for the 2023 GTM took participants from Finland, India, the United Kingdom, Austria, Spain, the Czech Republic, Slovenia and Hungary to places that are prime examples of good accessible tourism in Thuringia, such as Erfurt, the Thuringian Forest National Park (including the treetop trail) and Leuchtenburg Castle.

As part of the supporting programme for its Brand Summit, the GNTB organised a special tour that show-

cased accessible offerings in Lübeck, Travemünde, Hamburg and Lüneburg Heath to journalists from 30 countries.

### Influencer campaign with Atout France

In cooperation with Atout France, the GNTB ran a campaign in which French and German influencers explored accessible offerings in areas of natural beauty and cultural hotspots in Baden-Württemberg and Marseille. Rail operators Deutsche Bahn and SNCF were partners in the campaign.

The influencers' respective communities were able to follow this Franco-German tour on social media. A video diary was posted on the YouTube channels of the content creators, the GNTB and Atout France, and shared via Facebook, Instagram and TikTok.

## GNTB shoots

The GNTB continued its photo and video shoots in 2023 to enable it to showcase the variety of accessible tourism in Germany to an international audience. The shoots covered a wide range of holiday types, cities and regions, target groups and types of disability.

The image database on the theme of 'accessible water-based tourism' was also expanded in 2023.

Pre-convention tour for participants of the 2023 GTM



Deutschland  
Das Reiseland



[www.germany.travel](http://www.germany.travel)

**DER  
KNOWLEDGE  
GRAPH  
ist live**





# DIGITALISATION

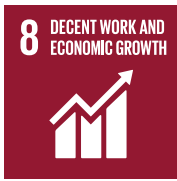
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The GNTB views digital transformation as a strategic area of action for making tourism in Germany more sustainable and future-proof.

This includes improving the visibility of eco-friendly offers on online channels and global sales platforms through semantically structured data, and optimising transport routes and visitor flows in order to save resources and minimise tourism's environmental footprint. Virtual reality, meanwhile, is opening up new dimensions in tourism marketing.

The GNTB encourages innovation across the organisation and internationally in order to make the most of the economic and environmental opportunities that digitalisation presents for inbound tourism.

## RELEVANT SDGS



## GNTB OBJECTIVES

- Promote digitalisation in tourism by assessing the potential applications for technological innovations in the industry
- Check the opportunities arising from digital innovation against sustainability aspects, and adapt accordingly
- Act as a role model through pilot projects for marketing Destination Germany abroad and developing the brand
- Actively share digital expertise and experiences with the industry
- Use digital workflows to minimise resource consumption

## OUTCOMES

- Launched the German tourism industry's Knowledge Graph as a milestone and a source of inspiration for other sustainability-related projects
- Improved visibility of sustainable products and accessible offerings
- Stronger networking with the AI community in industry and science and research
- Marketing presence in the metaverse (Decentraland pilot project)
- First VR app (Nature Experience in Germany) distributed via VR stores
- Green marketing: applied SDGs to all digital measures and considered sustainability aspects when selecting media
- Developed data model for nature parks and natural landscapes based on schema.org
- Launched Thin(gk)athon to make it easier to turn the integration of semantically structured data into real-world applications

## NEXT STEPS

- Continue to refine the Open Data project with further partners in tourism and the digital economy, and in collaboration with the research community
- Expand the Knowledge Graph by integrating transport data to improve the visibility of sustainable transport routes, incorporating the contents of the Travel for All database and linking data from Digitize the Planet
- Use voice assistants to optimise customer service, e.g. AI-supported chatbots
- Create Chinese version of the Nature Experience in Germany VR app, including adapting it for picotechnology
- Monitor new opportunities arising from future offerings in the metaverse on demand
- Explore the introduction of apps for the next generation of VR headsets that can blend digital elements with the user's real environment (spatial computing)

## Model cases in 2023 – technological innovations

### Launch of the Knowledge Graph – a milestone in the digital transformation and a step toward greater sustainability

Germany's inbound tourism industry is contributing to key areas of action in the government's data strategy through the Open Data/Knowledge Graph project. It is putting in place high-performance, sustainable data structures, it is making data use innovative and responsible, it is improving data literacy and it is establishing a data culture.

The German inbound tourism industry's Knowledge Graph was launched on 28 June 2023 by the GNTB and the other parties involved in the project. Since then, all industry players – such as global sales platforms, tourism service providers and startups – have had access to more than 550,000 data sets, including around 210,000 tourism assets (POIs, tours, events, hotels, restaurants and cafés) and around 340,000 infrastructure data items from all 16 federal states.

The Knowledge Graph is the basis for implementing a wide range of sustainable projects.

#### Visibility of certified offerings

As data is semantically structured, certified sustainable offerings can also be displayed and found on global sales platforms, and precisely marketed accordingly.

#### Opportunities for all

Small and medium-sized enterprises and Germany's lesser-known destinations can boost their international presence and marketing. This enhances the prospects of rural regions in particular in the international travel market



Alexa Brandau (GNTB), Armin Dellnitz (Magic Cities), Petra Hedorfer (GNTB) and Andreas Braun (Tourismus Marketing GmbH Baden-Württemberg) at the launch of the Knowledge Graph

### Sustainable visitor management

Open data is a prerequisite for linking databases and using the resulting insights to target travellers more precisely. It enables the smart management of traffic and visitors flows, for example to avoid bottlenecks, present alternative transport options and reduce the pressure on tourism hotspots during the high season.

### Easing the burden on skilled staff

AI-assisted applications can handle simple workflows, thus easing the burden on skilled staff and improving the quality of service for customers. The AI-assisted chatbot developed by the GNTB for its crisis communications following the outbreak of the COVID-19 pan-

*The Knowledge Graph is the basis for implementing a wide range of sustainable projects.*

demically enabled the organisation to answer questions from customers 24/7 without having to deploy additional staff. This chatbot is now being developed further with the aim of inspiring visitors with sustainable offerings in Destination Germany.



Winners of the GNTB Thin(gk)athon in November 2023

## GNTB Thin(gk)athon empowering AI projects

The GNTB organised a Thin(gk)athon for a selected group of digital experts and representatives from destinations, startups and the research community. Its aim was to harness the potential of the Knowledge Graph and the data that had already been captured, and use it to develop solutions that can be quickly implemented and thus could be of practical use to the participants.

Ideas for innovative tourism projects were refined during this interdisciplinary workshop on 16 and 17 Novem-

ber 2023, and creative concepts were prepared for practical application:

- **Touristic Data Feeder**, an AI-based assistant that helps destinations to capture partner data for use in the Knowledge Graph
- **AI-Assisted Data Management Solution**, a digital platform that complements the Touristic Data Feeder by recreating a comprehensive digitalisation and updating scenario

- **Promo-Partner**, a tool that automatically creates social media posts based on information from the Knowledge Graph
- **Journey.ai**, a tool for optimised travel planning created by integrating various open interfaces
- **Wowzer**, audience-specific products based on data from the Knowledge Graph that make it easier to plan family activities, for example

## Presentation during the Destination Track at the 2024 ITB

Dirk Rogl, CEO of Travel Commerce, presented innovative solutions for the tourism sector on the eTravel stage at the ITB travel fair, while the GNTB showcased the Open Data/Knowledge Graph during the Digital Destination Track. Also present were Touristic Data Feeder and AI-Assisted Data Management Solution, the winners of the Thin(gk)athon.

## Digital innovation in marketing

### Conversational interfaces facilitate access to content and cut resource use

The voice is becoming an increasingly important input/output medium for communications between humans and digital devices. The GNTB, for example, is using AI-assisted chatbots with great success.

Digital, interactive information providers, which are increasingly able to answer more in-depth questions in conversation, are already established in tourism marketing. Based on AI and well-trained in the product, their importance will grow in the future. Apart from providing information about a destination, they can also offer invaluable insights into customer requirements. Their range of uses includes everything from screenless output devices and websites to avatars providing information in three-dimensional virtual worlds.

The GNTB is already using AI-assisted chatbots with great success and aims to expand their capabilities and areas of application in the future.

### Managing visitor flows

The German Travel Secrets app for smart speakers, such as Alexa, is currently offering podcasts and audio experiences that share travel tips for less well-known regions and places of interest.

### Regionality

In the 'German. Local. Culture.' campaign, a chatbot targeted users with regional offerings in German towns and cities, from traditional crafts and customs to culture, architecture and experiences in the surrounding rural areas.

### Accessibility

Voice assistants and other conversational interfaces can make it easier for people with disabilities – such as visual impairments – to access tourism offerings because of their use of AI and access to the latest data.

*The voice is becoming an increasingly important input/output medium for communications between humans and digital devices. The GNTB, for example, is using AI-assisted chatbots with great success.*

## Virtual reality project successfully promotes sustainability

The GNTB is currently wowing audiences at events – and home users with access to a VR headset – with a multimedia, highly immersive and fully accessible virtual 3D world.

The GNTB has been systematically investing in augmented, mixed and virtual reality applications (collectively referred to as XR) for some years. XR technologies offer potential visitors an interactive and engaging experience that can generate interest in specific destinations and influence travel choices.

*Using the virtual presentation at fairs and events can significantly reduce resource consumption.*

The Nature Experience in Germany VR app promotes tourism in rural areas and environmentally friendly holiday activities such as walking, cycling, climbing and touring on the water. In the latest version of this digital 3D world, users can explore Germany's natural landscapes on a virtual kayak tour.

Sustainable travel options are advertised in numerous places. At many train stations, for example, people are offered tips about sustainable travel, such as tourist cards that include free travel on public transport. Else-

where, the 'camping world' features practical tips on how to protect nature and be a good green camper.

This VR app is the first developed by the GNTB for use in the latest generation of wireless 3D headsets, which allow the user to move around freely. The performance and content of the app were upgraded in 2023.

The needs of people with accessibility requirements were fully taken into account when producing this virtual application. For people with impaired hearing, for example, the voiceover can be displayed as text, and wheelchair users can easily use the application at their sitting height.

Using the virtual presentation at fairs and events can significantly reduce resource consumption, as replicating its features, such as flight simulator, large-screen cinema, climbing and canoeing, in the real world would involve considerable effort and expense.

User feedback has been very positive. In 2023, the app was nominated for the German Digital Award and presented as the 'most innovative solution' at the 2023 Zero Project Conference in Vienna. The VR app scooped the X. Award in the category 'Digital impact' at the 'Future. Destination.Brand. Exploring digital shifts in the future of destination branding' event in London. The app, which was initially used at international GNTB events, is now available to download from Meta and other providers.



The Nature Experience in Germany VR app at the 2023 ITB



The GNTB in Decentraland

## Decentraland pilot project

### The GNTB offers inspiration in the metaverse

The metaverse, which blends real and virtual worlds, opens up exciting new opportunities for destination marketing. The benefit of a marketing presence in the metaverse is that the customer is essentially already on board and can be addressed directly and familiarised with the product through immersive, interactive content. The dwell time for well-made, interactive 3D worlds can be significantly higher than for current digital advertising. Detailed performance monitoring offers some entirely new evaluation options and ensures a rapid learning curve in project development.

In line with its commercial responsibility defined in the sustainability strategy, the GNTB adds new communication channels to its marketing mix in order to quickly test and become familiar with the essential processes, opportunities and challenges of these new media.

2022 was the year of metaverse hype, which prompted the GNTB to launch a test project to assess the potential benefits for destination marketing.

As a first step, programmatic advertising was used to present themed ads and videos promoting Destination Germany on around 1,000 advertising spaces. Decentraland facilitates the measurement of KPIs such as ad impressions, and shows where digital users are from and whether they have a digital wallet.

In the next step, the GNTB used social media and Decentraland's internal channels to invite users to a branded presentation booth. Here, users were able to activate a variety of videos and interactive 8D sound clips, and visit the GNTB's website and social media channels. At 38 per cent, user engagement was very good.

The extensive insights from the test project will guide the next steps into three-dimensional virtual worlds.

**Exhibitions marking the 250<sup>th</sup> anniversary of the birth of Caspar David Friedrich:**

**Staatliche Kunstsammlungen Dresden**  
24 Aug 2024 – 5 Jan 2025, Albertinum  
24 Aug – 17 Nov 2024, Kupferstich-Kabinett

**Alte Nationalgalerie Berlin**  
19 Apr – 4 Aug 2024

**Kunsthalle Hamburg**  
(Dec 2023 – Apr 2024)  
With 395,000 visitors the most visited exhibition in the museum's history

... and other exhibitions, concerts and festivals throughout Germany



**GTM**  
Germany Travel Mart  
Chemnitz, 21 – 23 April 2024  
[www.germany.travel](http://www.germany.travel)





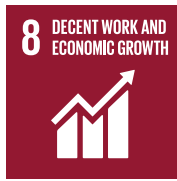


# NETWORK AND STAKEHOLDER MANAGEMENT

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Making tourism more sustainable is one of the sector's biggest challenges. As an organisation with a broad network in the international travel industry and partners in inbound tourism to Germany, the GNTB provides fresh ideas and expertise, and acts as an enabler. Working with associations, service providers and decision-makers in government, it uses a wide range of formats to define strategic areas of action, as well as specific goals and their implementation. Sustainability, with its facets of economy, environment and social responsibility, is an essential factor in all decisions.

## RELEVANT SDGS



## GNTB OBJECTIVES

- Pick up on and analyse international tourism trends with the aim of helping the industry to implement future requirements
- Raise awareness of the relevance of sustainability and upcoming regulatory changes through targeted agenda setting
- Use international presence to support Germany's positioning in the market as a sustainable travel destination
- Make sustainability-related topics the focus of stakeholder communications at home and abroad via existing and new communication formats

## OUTCOMES

- Expanded the sustainable tourism network in Germany through strategic partnerships, for example with the Sustainable Travel Destinations Excellence Initiative and the German Climate Fund for Tourism, and by sitting on various judging panels
- Focused knowledge-sharing formats in Germany and abroad more closely on sustainability, for example the Sustainable Tourism Day and the Knowledge Days in 2023, as well as the market insight webinars, market-specific trade and press events, Global Trade Corner, B2B newsletters and presentations
- Stepped up stakeholder and partner communications on sustainability with the progress report on sustainability, in committee meetings and on B2B social media, in podcasts and in blog posts
- Organised workshops and in-person events along sustainable lines using the balanced scorecard approach
- Joined the Global Sustainable Tourism Council (GSTC)
- 2024 Accessible Tourism Day (see 'Accessibility' chapter)

## NEXT STEPS

- Further expand event formats for sharing knowledge: Sustainable Tourism Day and Knowledge Days in 2024
- Widen strategic partnerships with associations, organisations and initiatives
- Expand the expert network and integrate it into GNTB activities
- Share knowledge through market-specific and theme-specific workshops and webinars

## Highlights in 2023 – sharing knowledge

The structures of tourism and the topic of sustainability are both highly complex, so it is all the more important to share knowledge across the tourism industry to identify areas for action and develop viable ideas.

In its definition of sustainability, the GNTB focuses on accessible tourism alongside environmental protection and climate action, and on digital innovation in the commercial sphere. In all three areas of sustainability, i.e. responsibility to the environment, the economy and society, the GNTB regularly organises knowledge-sharing events featuring distinguished speakers for its members, partners, sponsors and other interested parties.

Over the course of the year, sustainability aspects also regularly feature in many webinars that discuss current topics and present market-specific information. These include the market insight webinars, which are organised by the foreign representative offices or sales and marketing agencies and focus on relevant information from the markets.

The various formats offer the GNTB targeted ways of sharing knowledge and finding solutions together.

## Knowledge Days

Every year, the GNTB organises the Knowledge Days with the aim of increasing the competitiveness of service providers in Germany's inbound tourism industry. The agenda focuses on current talking points, presented by a line-up of high-calibre speakers, and looks ahead to the future.

During the 2023 Knowledge Days, held under the banner 'Incoming Tourism fast forward', the GNTB offered fresh ideas for digitalisation and green transformation.

Fabian Westerheide, CEO of Rise of AI and a founding partner of Asgard Capital, gave the keynote speech for the first topic, Embracing Artificial Intelligence. Further

presentations on 'What Web 3.0, ChatGPT and the Knowledge Graph mean for tourism' and 'Unlocking Blockchain Potential in Travel' explored the journey from technological innovation to practical solutions for greater sustainability in tourism. The event was also open to non-members for the first time.

During the 'Sustainable Tourism Fast Forward' session, GNTB experts analysed the importance of sustainability to the GNTB's value-based target groups, offered insights into the new 'Sustainable Travel Trends to Germany' data dashboard and showcased how the GNTB is promoting climate action in Germany's inbound tourism industry.

### KEY FINDINGS AND LESSONS

Greenhouse gas emissions from air travel must be reduced further. This can be achieved by avoiding emissions through intermodality, reducing them through operational excellence and technology, or offsetting them.

The use of a range of data sources in the GNTB's data dashboards makes it easier to link information that is relevant to business and climate action.

Generative AI applications can already help with adapting text for a wide range of applications, such as social media formats, and generating background images.

The chatbot Anja on [germany.travel](https://www.germany.travel) is already able to learn as it goes thanks to AI. Improvements to its language module and the link to the GNTB's Knowledge Graph have expanded its potential applications.



Above: images from the Sustainable Tourism Day; below (left to right): Angelika Sauermost (Occitanie Tourism Agency), Marco Giraldo (TourCert gGmbH), Suzann Heinemann (GreenSign Institut GmbH), Thorsten Unselde (Digitize the Planet e.V.), Matthias Hickl (GNTB), Olaf Schlieper (GNTB), Professor Wolfgang Strasdas (Eberswalde University for Sustainable Development), Bettina Schuett (Dorint GmbH), Swantje Lehnert (Futouris e.V.), Dr Nadine Scharfenort (German Climate Fund for Tourism (DKT)), Professor Walter Leal (Hamburg University of Applied Sciences (HAW Hamburg))

## 2023 Sustainable Tourism Day

The GNTB's Sustainable Tourism Day provides a platform for the industry to meet and talk, and present strategic targets and practical solutions for greater sustainability in tourism to Germany. The event was held in Frankfurt for the second time on 26 September 2023.

Around 80 experts, decision-makers from politics and business, stakeholders and partners in Germany's inbound tourism trade discussed policy and sector-specific requirements for the future.

The increasing demands that the European Green Deal places on the players in the tourism industry and the

implementation of the EU's Corporate Sustainability Reporting Directive (CSRD), which came into effect in January this year, were the main talking points.

Data on actual travel behaviour is essential when making informed, strategic decisions about greater sustainability in tourism. The GNTB launched its new 'Sustainable Travel Trends to Germany' data dashboard at the Sustainable Tourism Day to make the latest data available in a format that can be used immediately (detailed information can be found in the chapter 'Business Intelligence').

## The 2023 Sustainable Tourism Day at a glance

Opening address: Dieter Janecek, Federal Government Coordinator for Tourism (video statement)

Keynote speech: **The consequences of climate change for tourism**, Prof. Walter Leal, Head of the Sustainable Development and Climate Change Management research centre at Hamburg University of Applied Sciences

### Presentations and lectures

- **The importance of sustainability to the GNTB's value-based target groups, and sustainable travel trends – insights into the data dashboard**, Matthias Hickl, Head of Business Intelligence at the GNTB
- **Digital nature conservation and visitor management**, Thorsten Unseld, Senior Communications Manager, Digitize the Planet
- **Occitanie in Southern France – the sustainable transformation of a destination**, Angelika Sauermost, Head of Quality & Transition, Occitanie Tourism Agency
- **Sustainability in the GNTB's global marketing**, Olaf Schlieper, Head of Innovations Management, GNTB
- **Measuring the sustainability of tourism in Germany: the Tourism Sustainability Satellite Account (TSSA)**, Professor Wolfgang Strasdas, Eberswalde University for Sustainable Development



Keynote speaker Professor Walter Leal

### Panel discussion

Climate action and adaptation in tourism to Germany

- Dr Nadine Scharfenort, Project Manager, German Climate Fund for Tourism (DKT)
- Marco Giraldo, Managing Partner, TourCert
- Swantje Lehnert, Managing Director, Futouris
- Suzann Heinemann, Managing Director GreenSign Institut
- Professor Wolfgang Strasdas, Eberswalde University for Sustainable Development, ZENAT

The GNTB gave its new member Dorint GmbH the opportunity to present its sustainability activities in the area of hospitality during the Sustainable Tourism Day.

### KEY FINDINGS AND LESSONS

Climate action is another area where Germany faces strong international competition.

Visitors are increasingly well-informed and highly aware of sustainability, which places an onus on destinations to align their offerings even more closely with customer expectations.

Certifications are key to the structured approach of industry players, as external audits boost credibility and increase commercial opportunities.

## Events in 2024

- Social: Accessible Tourism Day (6 March 2024, ITB, Berlin)
- Economy: Knowledge Days (11–12 June 2024, Esslingen)
- Environment: Sustainable Tourism Day (25 September 2024, Frankfurt)

## Workshops and webinars

As part of its network and stakeholder communications, the GNTB regularly holds themed networking events, workshops and webinars for its members, sponsors and partners in tourism to Germany, with the aim of sharing knowledge that supports the ongoing, sustainable development of the industry. The content ties in with the close relationship between digital transformation and the GNTB's sustainability strategy.

### Overview of sustainability-themed international market insight webinars in 2023

#### POLAND

**Speaker** Bartek Szaro, Polish travel blogger, coach and co-founder of the Modern Tourism Center for training on sustainable tourism for DMOs, local authorities and the travel trade

**Topic** How important is sustainability to Polish travellers – a current trend or one for the future?

**Key findings/lessons** Tourists want to relax, so it should be easier to travel sustainably  
Key target groups: well-educated urbanites with travel experience and young people who have been raised with a love for the environment

#### BELGIUM

**Speaker** Herman Toch, in his role as co-founder of the agency FLRISH, has been helping companies with their sustainable transformation for several years

**Topic** The tourism industry at a crossroads – where do we go from here? (Case studies from the Belgian market)

**Key findings/lessons** Regenerative travel as a new form of holiday – longer stays and a preference for rural areas  
GNTB Belgium is adapting marketing activities accordingly

#### JAPAN

**Speaker** Koji Tsurumoto, founder and CEO of Travel Voice, Japan's leading travel trade news provider, and of the Marketing Voice tourism marketing agency

**Topic** Analysis of the role of sustainability in Japan's outbound travel market

**Key findings/lessons** 'Stay longer' has established itself as a long-term trend in Japan  
Workation and remote working are established in post-coronavirus society – growing pressure on employers to integrate this trend in day-to-day work

#### CHINA

**Speaker** Rui Zhao, founder of the Reborn Ecotourism Forum

**Topic** Current situation and development of eco-travel in China

**Key findings/lessons** Adaptation of marketing strategies, for example the development of tailored campaigns, the use of specific channels for addressing target groups and the delivery of personalised content  
Staging of the GNTB Sustainable Travel Award in the press area in partnership with Reborn



2023 market insight webinar in Israel

## ISRAEL

**Speaker** Dr Asher Vaturi, Director at Ecoplan, urban planner and sustainability consultant

**Topic** How do Israeli visitors approach sustainability in their travels?

**Key findings/lessons** Growing demand for longer stays and certified offerings  
Sustainability is increasingly a factor in travel decisions and destinations

**Speaker** Dr Maya Guez, author, lecturer at Tel Aviv University and journalist; specialises in tourism and sustainability

**Topic** How does the Israeli media approach the topic of sustainable travel?

**Key findings/lessons** Growing demand for longer stays and holidays in nature  
Deep appreciation for organic and natural products from Germany

**Speaker** Marcus Hagenbruch, general sales manager for Israel, Lufthansa Group

**Topic** Innovations in sustainable transport and insight into Lufthansa Group's capacity utilisation in the Israeli market

**Key findings/lessons** Objective: offer the best green product on the market  
Already actively promoting offsetting, introduction of SAFs, carbon-neutral by 2050

## UK

**Speakers** Ben and Ciara, (@going-greenmedia); influencers focused on sustainability and eco-friendly travel

**Topic** The sustainable British traveller

**Key findings/lessons** Green projects are a suitable approach to developing solutions for complex and everyday sustainability tasks in the travel sector  
Travel trends from the point of view of influencers will be reflected in the programmes of future fact-finding tours

## SWITZERLAND

**Speaker** Jon Andrea Florin, Managing Director of fairunterwegs (Swiss specialists in fair and eco-friendly travel)

**Topic** Sustainable travel in a changing market; sustainable travel and digitalisation as opportunity and catalyst

**Key findings/lessons** Focus on slow travel, go local, be open to surprises, reduce or offset carbon emissions, and pay an appropriate price  
Make the hosts' and the destinations' commitment to sustainability more visible

## CZECH REPUBLIC

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**Speaker** Blanka Pilátova, influencer with a focus on sustainability, and Karel Výrut, member of the executive board of the Czech Travel Association

**Topic** Positioning sustainable travel on social media in the Czech Republic

**Key findings/lessons** A growing number of people are interested in the topic, prefer to holiday in neighbouring countries to avoid air travel; while large tour operators tend to offer package holidays, small and medium-sized operators appeal more to travellers interested in sustainability

## SOUTH-EAST EUROPE

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**Speaker** Dr Ljubica Knežević Cvelbar, professor of economics at the University of Ljubljana and president of Slovenia's Strategic Partnership for Research and Innovation in Tourism – SRIPT

**Topic** Sustainability and technology in air travel

**Key findings/lessons** Too much greenwashing so far instead of real progress with decarbonisation

Progress through more efficient aircraft and SAFs, international collaboration needed

**Speaker** Balázs Gyémánt, blogger

**Topic** Sustainable travel for bloggers

**Key findings/lessons** All travel elements should have 'green' aspects, less flying and more rail travel with public transport or cycling at the destination. Sets a good example himself by focusing on local food and natural products and recommending them to his followers

**Speaker** Dr Igor Kovacevic, assistant professor in the faculty of economics at the University of Belgrade

**Topic** Sustainability in business travel and corporate events

**Key findings/lessons** The number of business and corporate events has recovered post-coronavirus, but the importance of sustainability has increased

Growing importance of:

- Green certifications for events
- Integration of local partners
- Working with minorities and marginalised groups
- Reduction of food waste
- Unused food products retained

## NORTH-EAST EUROPE

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**Speaker** Maria Soxbo, influencer and co-founder of Klimatklubben

**Topic** Climate-friendly travel from Sweden to Germany

**Key findings/lessons** Analysis of influencer trips to German destinations in order to outline even closer collaboration in the future





Market insight webinars in the Czech Republic, Spain and Italy in 2023

## Sustainability-themed market insight webinars in Germany in 2023

**Webinar for the members of the Romantic Road:**  
 'Digital revolution 2.0: how tourism is facing digital challenges'

In this webinar, the GNTB presented the basic technical features and functionality of the Open Data/Knowledge Graph project. Key points from a sustainability aspect were collaborative destination development (smart destination), comprehensive visitor management (simplifying and smoothing out visitor flows) and the GNTB's digitalisation projects to improve the visibility of sustainable offerings. The Knowledge Graph can also be used as the basis for voice applications, which can facilitate access to information about barrier-free offerings.

**GNTB webinar 'Lufthansa and sustainability'**

The GNTB's employees and its strategic partners also attend webinars that explore new topics and current challenges. In a joint event with Lufthansa, 30 participants from the GNTB's head office and foreign representative offices learned about sustainable aviation fuels (SAFs), which represent a major step towards more sustainable air travel.

## Highlights in 2023 – sales

### GTM as a green event



Since 2012, the GNTB has run the GTM Germany Travel Mart™ – the largest sales event for inbound tourism to Germany – as a green event.

The 2023 GTM in Essen maintained this focus on sustainability, the environment, climate action and accessibility. Below are some of the aspects that featured:

#### Catering

- Regional and seasonal products
- Reusable tableware

#### Trade fair stands, furniture and furnishings

- Reduced use of furnishings across the event
- Reusable plants
- Use of rented furniture where possible
- Reusable GNTB stand

#### Emissions saved

**5.6**  
tonnes of CO<sub>2</sub>

by offering  
vegetarian food

approx. **18**  
tonnes of CO<sub>2</sub>

by arriving by train rather  
than car (petrol/diesel)

\* Based on two people per car

approx. **5**  
tonnes of CO<sub>2</sub>

by selecting  
specific hotels

#### Logistics and transport

- Local transfers mainly by public transport, selective use of buses
- Airport transfers on public transport, no shuttle service
- Deutsche Bahn event ticket providing discounted rail travel
- Carbon offsetting for all flights

#### Conference technology, content production and entertainment

- Local speakers and acts
- Procurement of energy-efficient technology

#### Events venue

- Barrier-free access
- Waste separation at most venues
- Public transport links and green electricity, where available

The 2023 GTM had an overall footprint of 956,257kg CO<sub>2</sub>.

## Highlights in 2023 – networking

The GNTB is involved in numerous national and international initiatives and networks. It shares its expertise and gives its partners a platform on which to present their projects and their findings. Always with a focus on the question of how to make tourism more sustainable through joint action and collaboration.

### The GNTB champions sustainability on the Global Sustainable Tourism Council (GSTC)

The GSTC manages global standards for sustainable travel and tourism, the GSTC criteria, and offers international accreditation of certification bodies for sustainable tourism.

The strategic collaboration with the GSTC enables the GNTB to strengthen Germany's positioning as a leading global tourism destination that is committed to sustainability, thereby enhancing its credibility in this area.

By sharing information with other GSTC members who are pioneers in sustainability, the GNTB can learn from their wide-ranging examples while contributing its own expertise and presenting sustainable projects and tourism offerings in Germany.

The GNTB joined the Global Sustainable Tourism Council (GSTC) in November 2023. This opens up opportunities for networking, presenting the GNTB's work and benchmarking against other organisations.



### German Climate Fund for Tourism (DKT)

The DKT project was initiated in April 2023 by the Federal Association of the German Tourism Industry (BTW) and is funded by the National Climate Initiative (NKI) of the Federal Ministry for Economic Affairs and Climate Action (BMWK).

The DKT's objectives, namely effective greenhouse gas reductions in line with national climate targets, implementation of viable climate action measures, and a transparent and standardised methodology – based on scientific evidence – for calculating greenhouse gas emissions along the tourism value chain, are in line with the GNTB's long-term sustainability strategy.

*The GNTB is involved in numerous national and international initiatives and networks.*

The BTW, GNTB, DKT and Futouris/KlimaLink have joined forces to harmonise the approach to determining the tourism industry's emissions using bottom-up calculation models. This dialogue forms part of the climate neutrality, environmental protection and nature conservation initiatives of the national Future of Tourism platform.

In addition, an agreement between the GNTB and the DKT offers the latter opportunities to hold presentations at the Sustainable Tourism Day and during the Knowledge Days and the GNTB's autumn meeting.

### Joint initiatives with GNTB members, sponsors and experts

Sustainability is a consideration when managing collaborations and partnerships, and is an integral element of all member events and meetings with partners.

The topic of sustainability was addressed at all stops on the 'GNTB meets members' tour in 2023, which took the CEO and her team across all 16 federal states to discuss international marketing, digitalisation, open data and more.

The GNTB engages in regular dialogue with the sustainability officers of the Magic Cities, the Historic Highlights of Germany and the German UNESCO World Heritage Sites Association.

As well as several online meetings, the GNTB organised an in-person workshop for the regional tourism organisations. In 2023, it took place the day before the Sustainable Tourism Day in Frankfurt with the aim of sharing experiences, providing updates and discussing specific matters relating to sustainable tourism.



Petra Hedorfer, Chief Executive Officer of the GNTB, and Barbara Radomski, Managing Director of Bayern Tourismus Marketing GmbH, and their teams during the 'GNTB meets members' tour

## Presence in national and international forums and media

Petra Hedorfer, Chief Executive Officer of the GNTB, promoted Germany as a sustainable destination in the international market and boosted community building

on the relevant platforms through her many speeches, articles, and interviews, and by participating in leading international events.



Every year, up to 5,000 delegates from the worlds of business, politics, science, research and culture attend the European Forum Alpbach (EFA) to discuss the major socio-political questions of our time and find interdisciplinary solutions. In 2023, Petra Hedorfer, Chief Executive Officer of the GNTB, joined Susanne Kraus-Winkler, State Secretary in Austria's Federal Ministry of Labour and Economy, and Peter Lochbihler, Global Director of Public Affairs at booking.com, in a panel discussion on how online travel platforms contribute to sustainable tourism.

## GNTB involved in the 2023 Sustainable Tourism Destination competition

The GNTB brought its international expertise to the judging panel of this Germany-wide competition aimed at driving the development of sustainable tourism products. The competition, which was initiated by the Federal Ministry for the Environment, Nature Conservation, Nuclear Safety and Consumer Protection (BMUV) took place for the third time in 2023 under the patronage of the German Tourism Association (DTV).

The six finalists received attractive marketing packages worth €10,000 each from the GNTB for use in international marketing. The finalists also featured in the Feel Good sustainability campaign on the GNTB website, [www.germany.travel](http://www.germany.travel), in newsletters and in high-reach social media channels.

The GNTB is thus sending a clear signal that making tourism more sustainable is essential to its future success, and that a genuine commitment will also pay dividends for destinations.

### German Tourism Award

The GNTB was once again a member of the judging panel at the DTV's German Tourism Awards in 2023. The awards recognise innovative projects launched on the market over the last two years that can act as model cases for tourism to Germany.

Through its seat on the panel, the GNTB is able to promote the development and marketing of innovative and sustainable products and services in inbound tourism to Germany. The set of criteria is split into 40 per cent inno-



Petra Hedorfer, Chief Executive Officer of the GNTB, alongside Stefanie Berk, member of the Management Board with responsibility for marketing, Deutsche Bahn Fernverkehr AG, at the national competition's awards ceremony on 21 June 2023

vation and 20 per cent each for the three pillars of sustainability: the economy, the environment and society.

### Bremen and Bremerhaven Tourism Prize

The Bremen and Bremerhaven Tourism Prize was awarded for the second time in 2023. Tourism service providers in the federal state of Bremen were invited to apply for, and win awards in, four categories highlighting particularly typical and sustainable, but also innovative projects. Exceptional hospitality skills were also recognised. One of the event's aims is to honour innovative and forward-looking projects across the federal state of Bremen. Petra Hedorfer, Chief Executive Officer of the GNTB, was a judge on this year's panel and presented the award in the 'Future' category.

## GNTB marketing expertise and network supports the Sustainable Travel Destinations Excellence Initiative

The Sustainable Travel Destinations Excellence Initiative comprises German destinations that are particularly committed to environmentally friendly, climate-conscious and socially responsible tourism. It provides a platform for networking, sharing information and jointly delivering projects. The GNTB maintains a close dialogue with the initiative in order to drive forward the shift to greater sustainability in travel to Germany.

As the representative of the Sustainable Travel Destinations Excellence Initiative, Marco Giraldo, Managing Partner at TourCert gGmbH, was able to contribute his expertise to the panel at the GNTB's Sustainable Tourism Day in 2023.

**1** NO  
POVERTY



**2** ZERO  
HUNGER



**3** GOOD HEALTH  
AND WELL-BEING



**4** QUALITY  
EDUCATION



**7** AFFORDABLE AND  
CLEAN ENERGY



**8** DECENT WORK AND  
ECONOMIC GROWTH



**9** INDUSTRY, INNOVATION  
AND INFRASTRUCTURE



**10** REDUCED  
INEQUALITIES



**13** CLIMATE  
ACTION



**14** LIFE  
BELOW WATER



**15** LIFE  
ON LAND



**16** PEACE  
AND JUSTICE



# INTERNAL MEASURES

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As a national tourist board, the GNTB is particularly committed to implementing sustainability in its own operations in a credible manner and acting as a role model for the industry. That is why business intelligence, networking, brand communications and the sharing of knowledge form an inseparable unit with the internal sustainability initiative. The way in which the organisation operates is systematically aligned with the sustainable development goals (SDGs). Accordingly, the internal strategy includes comprehensive measures to shrink the GNTB's environmental footprint, in line with the principle of avoid, reduce and offset. Social responsibility towards the workforce and responsible business practices are key elements of the internal sustainability initiative.

## RELEVANT SDGS



## GNTB OBJECTIVES

- Manage the organisation in line with the SDGs by linking SDGs to all of the GNTB's activities
- Expand scope of environmental management by analysing and minimising the organisation's environmental footprint, and use digital processes to monitor performance
- Continue to improve the sustainability of GNTB events and ensure that procurement along the supply chain takes sustainability into account
- Get the entire workforce involved in the sustainability strategy
- Obtain certifications to ensure transparency regarding the success of sustainability management

## OUTCOMES

- Analysed the relationship between GNTB activities and SDGs, and transparently presented the findings in the Cobra performance monitoring tool
- Introduced balanced scorecard for sustainable events planning and end-to-end performance monitoring
- Established environmental team with decision-makers in all departments who report directly to the Executive Board
- Obtained Green Globe and ECOPROFIT recertification and started the EMAS certification process
- Documented the targets reached in the first progress report on sustainability

## NEXT STEPS

- Obtain the first EMAS certification and ISO 140001 for the GNTB head office in Frankfurt
- Optimise the balanced scorecard for events based on the experiences gained in 2023
- Continuously expand sustainability training
- Improve the sustainability of trade fair stands
- Explore further measures for offsetting greenhouse gases

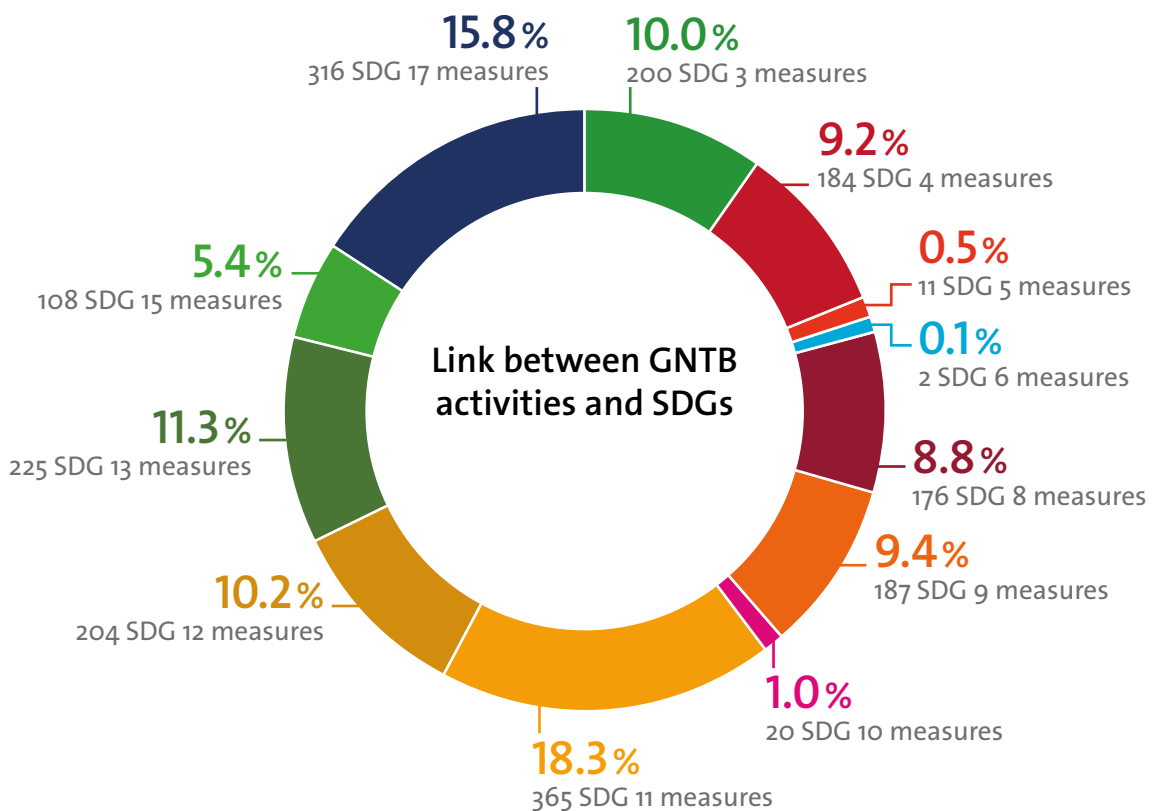


## Best practice in 2023

### Transparently presenting the relationship between GNTB activities and the SDGs

All GNTB activities (events, campaigns, transport) must contribute to at least one SDG (and up to three) and be recorded in the performance monitoring tool with a relevant explanation. An analysis of these entries shows that around 18 per cent of the GNTB's activities contribute to SDG 11, 'sustainable cities and communities',

followed by SDG 17, 'partnerships for the goals', at just under 16 per cent and SDG 13, 'climate action', at a little over 11 per cent. Overall, the distribution across the SDGs is wide-ranging, which reflects the broad spectrum of the GNTB's work.



### EMAS sets the new standard for environmental management

In 2023, the GNTB began to implement the EMAS Eco-Management and Audit Scheme at its head office in Frankfurt. This premium environmental management tool, created by the European Commission, helps us to assess, report on and continuously improve our environmental performance. The resulting environmental protection measures are designed to reduce resource consumption and costs while increasing employee awareness of sustainable working methods, with the

aim of linking sustainability and efficiency in business processes over the long term.

Through EMAS, the GNTB also meets the requirements of ISO 14001, the internationally recognised standard for environmental management systems (EMS).



## Standards and certifications

The GNTB's head office has been Green Globe certified for over ten years and now holds platinum status. The GNTB has also been involved in the ECOPROFIT regional environmental programme since 2014.

## New environmental team covers all areas of the GNTB

Sustainability ambassadors were appointed in all departments in 2023, where they act as the contact person and messenger for all matters relating to sustainability and the environment. Together, they form the environmental team under the leadership of the environmental officer, who reports directly to the Executive Board.

The team develops specific, cross-departmental measures aimed at achieving environmental goals and improving the GNTB's environmental performance and footprint. The interdisciplinary structure ensures that environmental management will be supported by employees and put into practice in day-to-day work.

## Training and guidelines with specific performance monitoring

In 2023, the GNTB offered its employees training sessions with internal and external speakers to support the greater focus on sustainability in procurement and projects. Guidelines were also formulated in collaboration with the teams for key areas such as IT, office, events, fact-finding tours, business trips, marketing and tenders, and published on the intranet. Digital performance monitoring tools were made available for documenting the climate-friendly, eco-friendly and/or socially responsible implementation of projects.

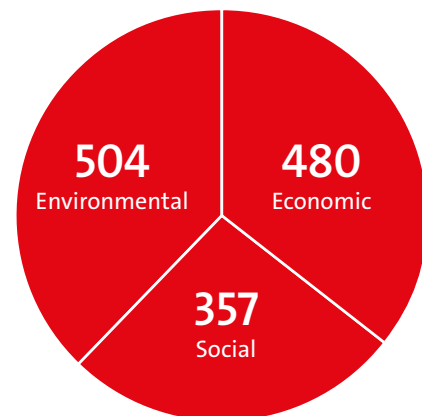
*The GNTB's environmental team works across departments on measures to improve environmental performance and goals.*

## Sustainable procurement and supplier management

All procurement applications must specify which environmental, economic and/or social aspects were taken into account when selecting products or service providers. The person responsible for approval must check that sustainability criteria have been considered. This process ensures that criteria relating to environmental protection, climate action and social responsibility are always reflected in procurement decisions.

From January to early November 2023, 1,341 minimum criteria, suitability criteria and award criteria incorporating economic, environmental and social aspects were formulated for 429 procurement processes.

### Distribution of criteria for GNTB procurement



## Balanced scorecard for planning and delivering GNTB events

Events are among the GNTB's key measures for promoting Destination Germany, so it is all the more important to take a wide range of sustainability aspects into account during the planning stage. With this in mind, the GNTB developed a balanced scorecard in 2022 for use in events planning.

The scorecard covers all in-person events planned and held by the GNTB, as well as all online events requiring additional organisational effort, for example when external premises or travel by speakers are involved.

The scorecard covers the categories 'conceptual requirements', 'catering', 'event design' and 'event equipment'. Each aspect in the categories is assessed using a scale from 'no, or insufficient, sustainable implementation = 0' to 'requirements exceeded = 8'. The highest score possible is 112 points; the higher the score, the more sustainable the events planning. Where the score is at one of the two lowest levels, a reason must be given why a higher score is not possible.

An initial assessment of the 53 events between January and the end of October 2023 for which an assessment was submitted resulted in a high average score of 87.7 points. The next step is to review the scorecard against the initial experiences of using it in 2023 and optimise it further for 2024.

## Transport emissions reduced and offset

Business trips and travel to events by delegates and speakers are essential to the GNTB's role as a tourism marketing and networking organisation. There are also the employees' journeys to work to consider. In order to effectively reduce the associated emissions, the GNTB follows the principle of avoid, reduce and offset at all aforementioned operational levels.

### Supporting sustainable transport

Over the last five years, the GNTB has been systematically switching from domestic flights to rail travel with the aim of reducing the particularly damaging emissions from aircraft. Rail is also the preferred option over flying for travel within Europe.

### Offsetting carbon emissions from travel

The GNTB offsets all emissions generated by travel that it has initiated and paid for. This applies to business trips by its own employees as well as to travel by journalists and influencers, for example. In 2023, a total of 1.5 million kilograms of greenhouse gases were offset, thus supporting audited and certified climate change mitigation projects.

### Fleet scaled back and made more sustainable

By scaling back the vehicle fleet in recent years to just one hybrid vehicle, consumption of fossil fuels has been reduced by almost 93 per cent, from 2,334 litres in 2012 to 165 litres in 2022.

### Job ticket

The GNTB subsidises a job ticket that

- encourages the use of public transport and minimises emissions from commuting and business trips, and
- helps to reduce the financial burden on its employees.

The Deutschlandticket is issued by the Rhein-Main-Verkehrsverbund (RMV) network, currently with a discount of 5 per cent. The GNTB contributes a further 50 per cent, the maximum employer subsidy, which means that the cost for employees commuting to work on public transport is just €23.27 a month.

Before the Deutschlandticket was launched, 16 employees used a job ticket. Since its introduction on 1 May 2023, that number has risen to 50 (February 2024).

## Taking responsibility for the welfare of the workforce

### Training and degree apprenticeships

In 2023, the GNTB had eleven trainees and six students on degree apprenticeships. The training provided covers the mandatory curriculum and incorporates sustainability-related topics.

### Continuing professional development

At the GNTB, we believe that adding new skills and sharing expertise is hugely important. Employees who engage in continuing professional development and have knowledge of the latest research and trends are essential to the organisation's long-term competitiveness and ability to innovate.

Specialist training sessions that do not need to be provided in person are preferably held online to avoid emissions from travel. Where possible, in-person events are run at GNTB premises so that employees do not have to travel to an external training centre. If a course must be provided externally, employees are encouraged to take public transport to get there.

## Protecting resources

Reducing consumption at head office (compared with 2022/2013)



	Absolute	%
Total training sessions in 2023	63	100
Online training sessions in 2023	25	39.68
Offline training sessions in 2023	38	60.32
Internal training sessions in 2023	32	50.79
Training sessions in external premises in 2023	31	49.21

GNTB employees regularly share the latest news about environmental management and sustainability activities at the GNTB with their colleagues during internal training sessions.

### Flexible working arrangements

In order to reduce emissions caused by commuting and make the most of the opportunities for improving work-life balance presented by digitalisation, the GNTB offers its employees 25 different part-time working arrangements in addition to the regular full-time model with flexitime. These include variations in the hours and weekdays worked, as well as the option to work from home.

### Equal opportunities/diversity management

The GNTB wants its organisation to reflect the diversity in society, and contributes to gender equality through its above-average proportion of female employees, both overall and in management positions.

	Women	Men
Total employees	67.6%	32.4%
Employees in management positions	58.3%	41.7%
Parents in management positions	11.9%	10.2%

The age structure at the GNTB is also diverse. This mix of age groups combines new skills and fresh ideas with extensive experience and expertise.

Age groups	Absolute	%
Employees aged < 30	22	20.2
Employees aged 30–50	44	40.4
Employees aged > 50	43	39.4

### Company outing

Following a hiatus due to the coronavirus pandemic, the GNTB was once again able to organise a company outing in 2023, with 40 employees taking part. Inspired by the current UNESCO campaign, the Darmstadt Artists' Colony on Mathildenhöhe was chosen as the destination.

### Health and safety

The health and safety of its employees is a priority for the GNTB. This safeguards the organisation's day-to-day operations and, most importantly, the wellbeing of the employees.

A health day is held at regular intervals offering employees practical advice on how to take care of their health while at work.

Safety measures are also implemented, such as periodic fire safety training sessions with theoretical and practical elements.

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