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**Germany**  
*The travel destination*



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2021

Sustainability • Digitalisation • Recovery

# TAKING OPPORTUNITIES

ANNUAL REPORT

German National Tourist Board

Agility

**MEANINGFUL**

**SUSTAINABILITY**

Community management

Workation

**QUALITY TOURISM**

Innovations

**RESILIENCE**

Bleisure travel

Tourism acceptance

FAIR data

**CRISIS MANAGEMENT**

Rurbanisation

Multi-generational travel

**INDIVIDUALISATION**

Health management

Robotics

**THE HUMAN FACTOR**

Digital visitor management

**CLIMATE ACTION**

**DIGITALISATION**

Cooperations

Artificial intelligence

Immersive

Build back better

**TRENDS FOR  
THE RESTART  
OF TOURISM**

**OPEN DATA**

**AUTHENTICITY**

Appreciation



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# OPPORTUNITIES FOR A SUSTAINABLE RECOVERY

## DEAR FRIENDS AND COLLEAGUES, VALUED PARTNERS IN THE GERMAN TOURISM INDUSTRY,

'Emerging stronger from the crisis' was the conclusion in 2020, the first year of the pandemic, and it was the basis upon which we entered 2021.

The COVID-19 pandemic continued to hold back global travel in the year under review. At the same time, technological developments, medical advances and the undiminished desire of people around the world to travel brought the promise of a qualitative revival of international travel.

Over the course of the year, our entire industry was working under extraordinarily changeable conditions. There was hope in the summer months that travel might recover rapidly, but by the end of the year the third and fourth waves of coronavirus, and the unknown impact of the Omicron variant, put paid to that.

This annual report for 2021 provides a compact overview of the GNTB's activities aimed at pursuing, clarifying and refining our recovery strategy for inbound tourism to Germany in response to the pandemic.

Although the situation in our source markets remained volatile, it was important to maintain the strong awareness of the Destination Germany brand and to consolidate Germany's position in the international travel market. At the same time, we took immediate advantage of the easing of travel restrictions to roll out our scheduled marketing campaigns, but on a more flexible basis.

Our evidence-based actions were founded on a detailed analysis of the impact of coronavirus and of developments specific to individual markets. To ensure our network in the international travel industry and our tourism partners in Germany also had access to the insights gained, we expanded the digital formats and platforms we use to share knowledge.

The COVID-19 pandemic brought about more than a temporary drop in travel, which in previous crises quickly bounced back thanks to pent-up demand. For years, we have been experiencing a fundamental change, both in the industry and in terms of customer expectations, and throughout the tourism value chain. Macro trends in society, such as digital transformation, the development of sustainability strategies and changes to the world of work are magnified in the tourism industry. Many of these trends have gained unexpected momentum as a result of the pandemic.

Accordingly, the foreseeable changes in travel behaviour post-coronavirus were and remain an essential part of our recovery strategy.

In 2021, the GNTB continued to drive forward the process of digital transformation in customer communications and in its work within the travel industry. Together with our partners in the regional marketing organisations, we made considerable progress with the delivery of the open data/knowledge graph project. Data that is openly available and semantically structured will enable the development and



delivery of AI-based applications and turn Germany into a genuinely digital destination. This in turn will create opportunities for start-ups offering new services for prospective travellers. Open data has also become a key competitive factor as it makes our tourism offerings more visible for global online platforms and promotes sustainable tourism, for example through intelligent systems for managing visitor flows.

Sustainability has been a core theme for the GNTB for over ten years. Thanks to our innovations management, we are a strong partner in our industry in Germany and attract worldwide attention. We were able to significantly increase the scope of our Feel Good sustainability campaign in 2021, and international awards and praise are proof that we are on the right course.

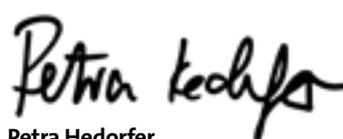
In German.Local.Culture. and German.Spa.Tradition. we have created two further international campaigns that pick up on travellers' growing desire for authenticity, for sustainable experiences and for peace of mind.

The GNTB's activities are facilitated by strong support from the Federal Ministry for Economic Affairs and Climate Action (BMWK). The Executive Board is particularly grateful to the decision makers in government, especially at the BMWK, and to the Tourism Committee of the German Bundestag. We look forward to working with Claudia Müller, the new Federal Government Coordinator for the Maritime Industry and for Tourism, and Member of the German Parliament.

We would also like to take this opportunity to thank the GNTB members, who have worked closely with us during the past two pandemic-hit years and showed great appreciation for our efforts.

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

Finally, we would like to thank our committees, most of all the Board of Directors and its President, Brigitte Goertz-Meissner, and Vice Presidents Hubert Aiwanger, Reinhard Meyer and Guido Zöllick, and the marketing committee and Advisory Board. They have supported us in word and deed, and shown great appreciation for the work we do.



**Petra Hedorfer**  
Chief Executive Officer



**Reinhard Werner**  
Commercial Director



## CLAUDIA MÜLLER MEMBER OF THE GERMAN PARLIAMENT

Federal Government  
Coordinator for  
the Maritime Industry  
and for Tourism

**“Working together, we are aiming for carbon-neutral tourism that is exemplary in terms of environmental compatibility, economic viability and sustainability.”**

Tourism is important to Germany's economy. According to data from the Federal Statistical Office from 2021, the tourism industry accounted for just under 4 per cent of total gross value added in the German economy in 2019. If you include domestic contributions, the figure rises to a total of almost 7 per cent. The number of people working in the tourism industry was 2.8 million, or 4.1 million if you add those whose employment indirectly relies on tourism.

Inbound tourism has played the most important role in this success story. The number of overnight stays by foreign visitors to reunified Germany rose from around 35 million in the early 1990s to almost 90 million in 2019, when inbound tourism accounted for 18 per cent of all overnight stays in the German hotel industry. Foreign tourists accounted for almost 30 per cent of all tourism spend by overnight visitors in these pre-coronavirus times.

Nevertheless, the tourism industry is changing, and not just as a result of the COVID-19 pandemic, which brought an abrupt end to travel. A new digital era, the transition to a green economy and rapid changes in the world of work are key trends that will also have an impact on travel and the tourism industry in the future.

What's more, we can increasingly see a shift in customers' expectations when it comes to quality. But providing a high-quality tourism experience is contingent on having employees who are sufficiently motivated and able to provide the required standard of service. If we want to remain an attractive travel destination for international tourists, we have to come up with viable responses to the current lack of qualified staff, especially in the hotel industry and the restaurant trade. At the same time, we need to strike a better balance between economic growth and environmental responsibility.

Combating climate change is essential to the attractiveness of tourism destinations, and thus to tourism as an economic factor. Sustainable, environmentally compatible tourism development can help to preserve natural and cultural heritage, and contribute to the protection of nature through responsible travel and leisure choices. It's hard to think of another industry that relies so heavily on keeping the environment intact and culture authentic. If climate change continues at its current rate, it will impact on the appeal of tourism destinations, with direct consequences for the economy in the affected regions.

Travel itself contributes to the greenhouse effect, through journeys made for tourism purposes, of course, and the emissions they produce, but also through the increased consumption of resources by the hospitality industry. The tourism sector has already recognised this fact and is working on initiatives and projects to balance climate action and economic interests.

The sector is extremely motivated to reach the 1.5 degree target through innovation and through suitable measures. 'Working together, we are aiming for a form of carbon-neutral tourism that is exemplary in terms of environmental compatibility, economic viability and sustainability.' I would like to take this opportunity to encourage our tourism industry to come up with even more good ideas and solutions to help set it apart from the competition. If we put this into practice, tourism will be in a strong position to safeguard Germany's appeal as a destination for travellers from around the world, and to make a lasting contribution to regional value creation.

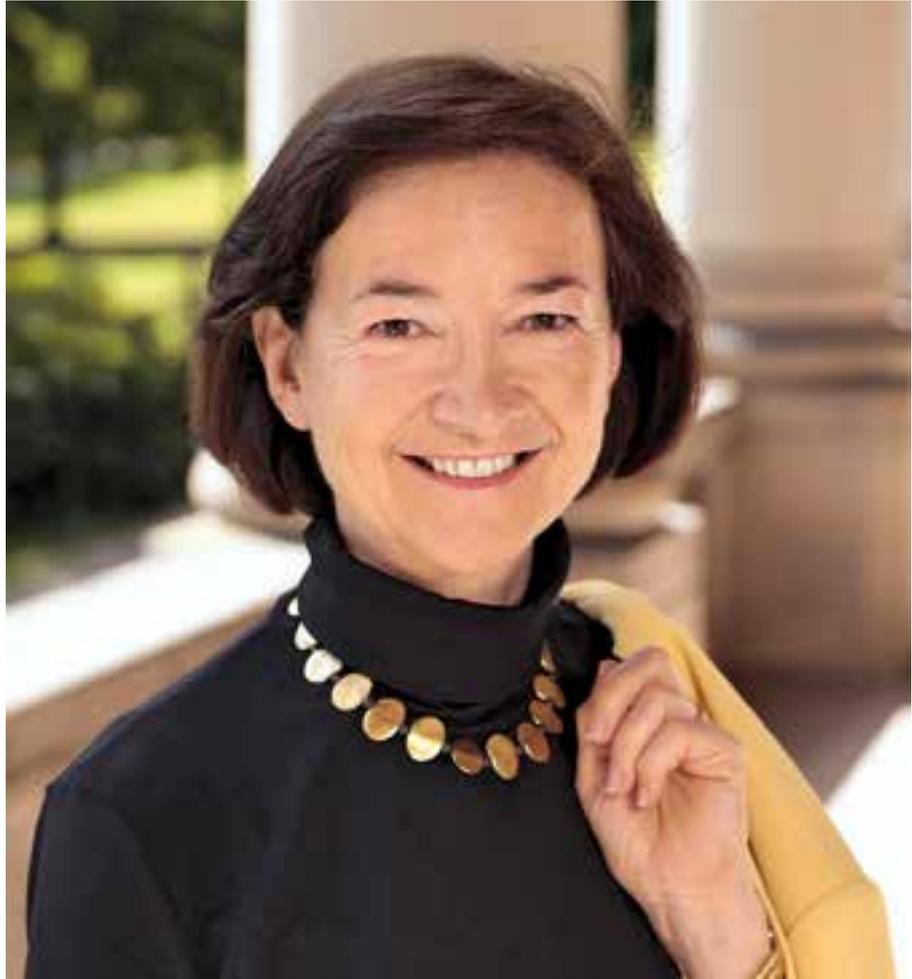
In its coalition agreement, the German government has formulated clear plans for tackling the processes of change. We want to enable a resilient new start for the tourism industry while meeting our obligations under the Paris Agreement and the climate targets of the European Union. The aim is to develop Germany as a tourism destination in a crisis-proof, climate-friendly, fair and innovative way. As the Federal Government Coordinator for the Maritime Industry and for Tourism, I will focus my efforts on these goals during this legislative period and assist the industry with its transformation on the road to a promising future.

As a sustainable travel destination, Germany has performed well in international comparisons. But we want to further improve our environmental footprint: climate-friendly transport, sustainable business and fair working conditions are important building blocks for the future of tourism.

We greatly appreciate the commitment of the GNTB and its partners at home and abroad to ensuring that Destination Germany remains competitive. This annual report is an impressive record of these activities. For that, I thank you. The Federal Ministry for Economic Affairs and Climate Action will continue to support this work so that we can carry on our success story in the medium term with a stronger, more sustainable and more climate-friendly Destination Germany.

# BRIGITTE GOERTZ- MEISSNER

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



## DEAR READER,

The COVID-19 pandemic hit inbound tourism to Germany particularly hard. While domestic holidaymaking returned to pre-pandemic levels in the summer months of 2021, travel restrictions and different approaches to managing coronavirus in various source markets put the brakes on international travel.

The GNTB, which presents its annual report for 2021 here, has demonstrated that it has the flexibility to deal with current challenges while setting the course for the future of tourism in the post-coronavirus era.

In the second year of the pandemic, it extended the scope of its crisis management far beyond conventional marketing to include the provision of reliable information – for example via an AI-assisted chatbot – for people willing to travel. Building on the high affinity that people have for Germany as a travel destination, the GNTB used empathy and inspiration to

maintain and even increase, despite further waves of infection, the desire to travel. It also adapted its long-term global campaigns German.Local.Culture. and German.Spa.Tradition. to the new expectations of customers in the markets, generating an excellent response that will provide a meaningful boost to the restart.

Digital transformation and sustainability, for many years key areas of action for the GNTB when it comes to inbound tourism strategy, have gained additional traction as a result of the pandemic. The use of new technology in marketing, for example, is an area in which the GNTB is particularly setting the pace in the German tourism economy.

Sustainability is an important selling point when it comes to marketing Destination Germany internationally, but balancing the needs of the environment, the economy and society is also a priority for the GNTB. The organisation is set-

## Vice Presidents of the GNTB Board of Directors



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



**Reinhard Meyer**  
President of the German  
Tourism Association (DTV)



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

## Honorary Presidents of the GNTB Board of Directors



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



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

ting a good example for the tourism industry, as it has been Green Globe certified for eight years and has just passed its ECOPROFIT certification again.

Corporate social responsibility, which is a key pillar of sustainability, is inextricably linked with equality for women in leadership roles. Today, around half of the managers at the GNTB head office in Frankfurt are female. And women now manage around half of our foreign representative offices.

The International Institute for Peace through Tourism (IIPT) has recognised Petra Hedorfer's commitment to the cause of women in leadership roles, honouring her with the internationally renowned Celebrating Her Award in 2021. The Board of Directors warmly congratulates her on this achievement.

We would also like to thank the GNTB's partners in government, the Federal Ministry for Economic Affairs and

Climate Action, the re-formed Tourism Committee of the German Bundestag, and Claudia Müller, the new Federal Government Coordinator for the Maritime Industry and for Tourism. The Federal Ministry for Economic Affairs and Climate Action increased its funding for the GNTB in 2021 to make up for the shortfall in third-party funding. We are in no doubt that this will prove to be money well spent for the tourism sector and its small and medium-sized businesses. The GNTB has set the course for a successful restart and sustainable recovery of inbound tourism. My fellow board members and I are looking forward to it.

**Brigitte Goertz-Meissner**

# PETRA HEDORFER

Chief Executive Officer  
of the GNTB



**“Global consumer trends are guiding the development of international tourism. We have to pay even closer attention to what they are telling us.”**

# “When it comes to Destination Germany, persistently high brand awareness and a rise in travel intentions among our customers are cause for optimism.”

## **Ms Hedorfer, the coronavirus pandemic has dominated global tourism for almost two years. What is your personal assessment of events so far?**

In 2020, the pandemic triggered the biggest crisis that international tourism has ever faced. We have all seen the figures. And while there were positive developments during the summer months, the pandemic caused further losses around the world in 2021.

On a personal level, I am sad to see tourism companies go to the wall despite extensive state aid. Behind each one are people who lived and breathed their work. We are already seeing the long-term effects, with many skilled workers switching to other sectors. But these are exactly the people we need if we want to maintain the quality standards that set us apart in the international market.

Fortunately, my assessment includes some rays of hope. On a global level, the rapid development of COVID-19 vaccines has been a huge success. And people’s continually growing desire to travel despite the pandemic gives me hope for global tourism. When it comes to Destination Germany, persistently high brand awareness and a rise in travel intentions among our customers are cause for optimism. I am very pleased that we put topics such as digital transformation and sustainable tourism on our agenda some time ago, as the shift to greater sustainability is even more urgent in the face of climate change. This leaves us in a far better position for a recovery that will be characterised by ever more intense competition.

## **That is why the Federal Ministry for Economic Affairs and Climate Action made an additional €10 million available to the GNTB in 2021 to help to mitigate the impact of the coronavirus crisis. How were these additional funds used?**

The additional funds were extremely important and helpful in supporting our recovery strategy during the pandemic,

and were used for marketing campaigns in our foreign representative offices. We were also able to implement projects such as the interactive data dashboard, which is part of our digital strategy. This enabled the GNTB to fight for the entire tourism industry, which predominantly consists of small and medium-sized enterprises, during the coronavirus crisis.

## **How would you gauge the outlook for a permanent recovery of travel at the beginning of 2022?**

If the last two years have taught us anything, it is that the pandemic situation cannot be predicted with any certainty, neither in Germany nor in most of our international source markets. Expert opinions vary to a considerable degree, as do the measures taken by each individual country to contain the pandemic. The more optimistic scenarios assume a transition from pandemic to endemic, while others warn of further variants and waves of infection.

The ifo Institute of Economic Research identified a significant improvement in its 2022 Business Climate Index for Germany, with the tourism sector, in particular, looking ahead to the summer with optimism. For inbound tourism, it is crucial that developments in the source markets and in Destination Germany are a good fit. And then there are the current challenges for the entire sector posed by the war in Ukraine.

In short, the recovery of travel will happen, but it is a task that will demand a great deal from us for some time yet.

## **What impact will that have on the GNTB’s global marketing of Destination Germany?**

The markets will recover, but not all at the same time. And customer expectations are considerably more nuanced from market to market. We have adapted to this with our recovery strategy and now have the tools to identify and react to market trends at an early stage. All marketing measures,

# “Key themes include climate action, quality tourism, greater awareness of sustainability, a growing desire for safety and peace of mind, demographic change, rurbanisation and digital experiences.”

whether global campaigns or market-specific activities, have been prepared and set up so that they can go live at any time. This flexibility will help us to quickly take advantage of any opportunities and to effectively position ourselves in any openings that present themselves.

## **Experts believed early on that the pandemic would fundamentally change tourism. Given your experiences so far, how would you describe the new normal?**

Global consumer trends are guiding the development of international tourism. That is why we have to pay even closer attention to what they are telling us. At the same time, it is important to focus more on developing innovative sustainable offerings and to promote them in a way that raises the profile of Germany as a travel destination.

Key themes include climate action, quality tourism, greater awareness of sustainability in all its facets from climate change to social responsibility, a growing desire for safety and peace of mind, demographic change, rurbanisation and digital experiences in new dimensions such as the metaverse.

International research into travel intentions, for example by the European Travel Commission, shows a high degree of wanderlust. Customers want to travel, experience cities and culture, and unwind. These types of holidays will define the new normal.

The trends that can be inferred from IPK International’s analysis of the impact of COVID-19 on international tourism provide further indication of what travel in the new normal might look like. Digital tools will play an increasingly important role along the entire customer journey, for example. Mobile apps for booking travel components online, including tickets for museums and sights, seats in restaurants or parking, are high on our customers’ list of priorities. Digital payment methods are on the up, and contactless check-in procedures that were necessary during the pandemic are now perceived as a convenience by customers. Many travelers want to switch from printed to digital travel guides. The bottom line is that customer expectations of the digital destination are increasing.

I think this is more than a single technological step; it is a long-term trend that will continue and will challenge us in the future.

## **What does that mean for the travel industry, and is the German tourism sector ready for it?**

The key question when defining tourism in the new normal will be how to make travel more sustainable. This is something our customers are pushing for. According to the IPK survey mentioned earlier, 46 per cent of respondents want more affordable sustainable options, 44 per cent want more sustainable holiday offerings and 42 per cent want more/

better information. Travellers also increasingly expect more sustainability certifications and specific sustainability information on the destinations' websites (both 34 per cent).

In this respect, Germany is well positioned. The 2021 Nation Brands Index ranks us as one of the countries likely to handle climate change the best, while the 2021 Sustainable Development Goals Index, which maps progress towards achieving global climate targets, ranks us in fourth place. This is reflected in the specific activities of our tourism industry. Many tourism enterprises in Germany have already developed innovative and ambitious concepts for sustainable products that strike a healthy balance between economic benefit, environmental protection and social responsibility. The high number of certifications, for example in the hotel industry and at the destinations, are an impressive reminder of this and provide customers with verifiable proof of the progress made. Our hugely successful Feel Good campaign takes this one step further by making these offerings available to a broad international audience. And as our very own Green Globe gold certification shows, we are leading by example.

When it comes to digital transformation, the industry is facing the considerable task of providing the data needed to meet customers' growing expectations in terms of information and services. Semantically structured, open data is the primary means of making our tourism offerings more visible for global online platforms. Open data also facilitates the development and implementation of AI-based applications and the digital destination, and allows start-ups to thrive.

It also enables the sustainable, intelligent management of visitor flows.

We launched the open data/knowledge graph project for the German tourism industry back in 2018 in close collaboration with the regional marketing organisations and the Magic Cities, and have coordinated all activities since then. The collection and semantic labelling of decentralised data across companies and sectors into a knowledge graph has been hailed as a model nationwide data infrastructure project. In a European comparison, we can see that we need to pick up the pace if we want to keep up with our competitors.

**A new German government was formed at the end of 2021.**

**What new challenges do you think the GNTB might face?**

In the past, we have very successfully fulfilled our statutory mandate under various political constellations and have reliably received support for this from government.

The new German government's strategic objectives provide the tailwind for the course we have set in our recovery strategy, which covers topics for the future such as digital transformation, sustainability and inclusion.

We want to pursue this approach so that we can maintain our top ten position among international travel destinations in an increasingly competitive market, and ensure that inbound tourism makes a qualitatively reliable contribution to tourism in Germany.

**“Many travellers want to switch from printed to digital travel guides. The bottom line is that customer expectations of the digital destination are increasing.”**





THE GERMAN NATIONAL  
TOURIST BOARD

# MARKETING DESTINATION GERMANY

From marketing and data management to knowledge transfer and networking, the GNTB's tasks are as varied as the destination it promotes around the world. Key areas of action include digital transformation, sustainability and support for the tourism industry – which consists mainly of small and medium-sized enterprises – in the international market.

# FACTS AND FIGURES ABOUT THE ORGANISATION

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

**27**

OFFICES  
WORLDWIDE\*

APPROX.

**200**

EMPLOYEES

\*as at 1 January 2022

**63**

MEMBERS\*

33 tourism companies  
16 regional marketing  
organisations  
14 associations and  
organisations

**151**

TRADE  
EVENTS  
WORLDWIDE

MORE THAN

**1,000**

PARTNER  
ACTIVITIES  
A YEAR

**17**

SPONSORS

THE GNTB

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

The GNTB promotes forward-looking and sustainable tourism in line with the objectives of the German government. The focus here is on digitalisation and sustainability. It supports the government's activities to make Germany a sustainable, climate-friendly, fair and innovative tourism destination after the pandemic.

**MORE THAN**

**8,000**

**INTERNATIONAL  
MEDIA CONTACTS**

**6,680**

**KEY ACCOUNT  
TOUR OPERATORS  
AND OTCS**

**SOCIAL MEDIA REACH**

**1.5 billion**

**MORE THAN**

**40**

**SOCIAL MEDIA  
CHANNELS**

with over 5.3 million  
followers/fans

**AROUND**

**100**

**GLOBAL AND  
MARKET-SPECIFIC  
CAMPAIGNS**

**NUMBERS**



# OBJECTIVES AND TASKS ASSIGNED TO THE GERMAN NATIONAL TOURIST BOARD (GNTB) FOR 2022

## Key objectives and tasks

The GNTB supports the focal points of the BMWK's tourism policy, which tie in with structural and socio-political interests:

- Sustainability and climate action
- Rural areas
- Education
- Accessibility
- Health tourism

## Market research

As an owner and sharer of tourism knowledge, the GNTB involves members and partners in analyses and developments, and makes tourism-related information on the defined source markets available.

Additional crisis-related forecasts are on the horizon in order to give small and medium-sized partners greater planning certainty when it comes to the COVID-19 pandemic.

## Market environment and digital transformation

The GNTB analyses the rapid pace of change in the digital arena and makes use of new applications. Chatbots, for example, are a particular focus, as is the use of conversational interfaces and immersive technologies along the entire customer journey.

Open data facilitates the development and implementation of AI-based applications and the digital destination. The GNTB coordinates the German tourism industry's open data project in close collaboration with the regional marketing organisations and the Magic Cities, with the aim of increasing the visibility of content about Destination Germany in all relevant channels.

## Marketing themes

The GNTB's marketing themes are based on the core aspects of the Destination Germany brand and on megatrends such as 'towns, cities & culture' and 'nature & relaxation'. The GNTB also supports and promotes sustainable tourism and barrier-free travel.

Other overarching marketing themes are business travel (as part of the collaboration with the German Convention Bureau) and tourism in rural areas.

The GNTB will adapt the campaigns scheduled for 2022, German.Local.Culture. and Embrace German Nature, in accordance with the pandemic situation at the time, and will run additional campaigns to promote sustainable tourism and city breaks.

## Marketing tools

The GNTB continues to develop innovative ideas and the appropriate tools to market Destination Germany around the world with a focus on specific themes. It analyses and assesses current developments and medium- to long-term trends in travel behaviour and uses the findings as the basis for its targeted marketing.

## Partner involvement and neutrality

The GNTB adopts an independent, transparent and non-discriminatory approach when it comes to the involvement of its members and partners. A key aim is to enable SMEs to participate.

Events organised by the GNTB, such as workshops, roadshows and trade events, will be prioritised over participation in large events such as trade fairs.

The GNTB will continue with formats such as the Knowledge Days and the market insight webinars to facilitate networking and knowledge transfer with partners in Germany's inbound tourism industry. The GNTB organises and runs a Barrier-free Tourism Day.

## Performance monitoring

Performance is monitored using an approach agreed between the BMWK and the GNTB, the methodology, content and scope of which are reflected in the final report on the GNTB's performance and success submitted by dwif Consulting in August 2018.

# INTERNATIONAL AWARDS FOR THE GNTB

## TOP INNOVATOR 2022

The GNTB was named a champion in the TOP 100 innovation competition for the second time. The judging panel was full of praise for the GNTB's successful use of digital technologies during the coronavirus crisis. Projects that swayed the judges' decision included the *#DiscoverGermanyFromHome* empathy campaign for the international market, featuring informative digital content and interactive and virtual experiences, an interactive data dashboard, an AI chatbot for communicating with (prospective) travellers, and market insight webinars that provided market research findings and expert contributions to help businesses with pandemic-related challenges.

The TOP 100 was established in 1993 to celebrate the innovative spirit and outstanding innovation successes of small and medium-sized enterprises. At the heart of the competition is a rigorous selection process that each participant must undergo. Professor Nikolaus Franke and his team examine over 100 innovation indicators in five categories: Innovation-friendly Senior Management, Climate of Innovation, Innovative Processes and Organisation, External Involvement/Open Innovation, and Successful Innovations. Essentially, the TOP 100 analysis looks at whether an organisation's innovations are the product of chance or the result of systematic planning, and could therefore be repeated in the future.



## DUAL RECOGNITION AT GERMAN BRAND AWARD

Special Mention for *#DiscoverGermanyFromHome* campaign and 'Palaces, parks and gardens' AR app

As part of the prestigious 2021 German Brand Award, the German Design Council awarded the *#DiscoverGermanyFromHome* empathy campaign and the 'Palaces, parks and gardens' AR app a Special Mention in the 'Excellence in Brand Strategy and Creation – Brand Communication – Social Media' category. The panel of experts' Special Mentions recognise outstanding aspects of brand management.



## Gold for the 'I'm dreaming' video at the GOLDEN CITY GATE FILM COMPETITION

The 'I'm dreaming' video from the GNTB's *#DiscoverGermanyFromHome* campaign won first place in the 'Country national' category in the 2021 Golden City Gate international film, print and multimedia competition. The 32 members of the international judging panel were particularly impressed by the video's mixing of real images and illustrations, and they praised it as a highly successful presentation of Destination Germany. The international panel considered 121 submissions in 16 categories from 22 countries.



## Feel Good campaign wins silver at the **WORLD RESPONSIBLE TOURISM AWARDS**

The Feel Good sustainability campaign won silver at the 2021 WTM World Responsible Tourism Awards. The prestigious accolade is a central feature of the WTM Responsible Tourism Programme and recognises the best responsible tourism initiatives across the world. The winners of the various regional competitions are nominated for the global awards. Harold Goodwin, WTM's Responsible Tourism Advisor, presented the award on 1 November during the 2021 World Travel Market (WTM) in London.



Feel Good sustainability campaign

# Winner of multiple awards

## **EUROPEAN CULTURAL TRAVEL NETWORK**

honours Feel Good and Wanderlust campaigns

'Feel Good' was runner-up in the 'Walking Tourism and Slow Travel – Synergies with Cultural Tourism' category at the 2021 Destination of Sustainable Cultural Tourism Awards organised by the European Cultural Travel Network (ECTN).

Also among the five finalists was the nature and active holidays campaign 'Wanderlust Germany', which won the prize at national level. The honours were announced at the ECTN's annual conference in Athens.



## **GREEN GLOBE** recertification: gold status since 2018

The GNTB was certified as a Green Globe organisation for the ninth successive year in 2021, retaining its gold status in the Green Globe programme.

The Green Globe Standard is a globally recognised certification for the travel trade. Participants must document their activities covering sustainable management and social/economic, cultural heritage and environmental indicators on the Green Globe system. An accredited, independent auditor conducts an on-site assessment of the organisation.



## **ECOPROFIT® ORGANISATION IN 2021**

In 2020, the GNTB's head office in Frankfurt was certified as an ECOPROFIT® organisation for the seventh year in a row.

The ECOPROFIT organisation in Frankfurt (ECOLOGICAL PROJECT For Integrated environmental Technology) aims to improve environmental protection by reducing the amount of resources that local businesses use and optimising their energy efficiency, while at the same time lowering operational costs.





# What do you consider the key areas of your/your party's work on the tourism committee during this legislative period?

## THE SPOKESPERSONS OF THE POLITICAL PARTIES ON THE TOURISM COMMITTEE OF THE GERMAN BUNDESTAG

The Tourism Committee raises public awareness of the economic significance of tourism through its initiatives, reviews and hearings. Representing a cross-section of parties, it deals with a range of tourism policy issues including the environment and nature conservation, transport and digital infrastructure, work and society, health, and finance. The members of the committee support the work of the GNTB by setting the agenda for tourism policy and, in doing so, advocating for the interests of the German tourism industry.

Hardly any sector of our economy is currently unaffected by the coronavirus pandemic, whether it is through the collapse of supply chains, increases in prices, or restrictions on contact. But the tourism industry has undoubtedly been hit the hardest. It therefore remains my top priority to ensure that people within the industry are able to get back to work. Consequently, and before spring is out, we need a new approach to dealing with coronavirus as it gradually abates. I would also like to discuss moves to add greater flexibility to the Working Hours Act, the adjustment of the 'mini-job' income limit, the lack of skilled workers and the risks posed to the industry by a politically motivated minimum wage. As a general principle, the burden of taxes and levies must not be allowed to increase any further, and there has to be a noticeable reduction of red tape. This would provide the economic conditions which enable our businesses to embrace new trends and digital opportunities.



**Jana Schimke, Member of the German Parliament**

Chair of the Tourism Committee (CDU)



**Stefan Schmidt, Member of the German Parliament**

Spokesperson on Tourism Policy for Bündnis 90/DIE GRÜNEN in the German Parliament

Over the next four years, we need to focus on two major issues: how to reboot the tourism sector following the coronavirus pandemic and how to make the industry – and Germany as a tourism destination – fit for the future. Over the last two years, the pandemic has brought the tourism industry to a virtual standstill, driven many businesses to the brink of bankruptcy, and cost large numbers of employees their jobs. The reboot must support the setting up of new businesses and the reopening of existing ones, while retaining skilled workers in the industry or enticing them back. But we also need to ensure that Destination Germany adapts – to the changing conditions caused by the climate crisis and to shifting travel patterns, such as the rise in independently organised trips and nature-based tourism. Our goal is a tourism industry that is fit for the future, economically viable, ecologically sustainable and fair to the community. To this end, we will, among other things, resume work on the national tourism strategy as soon as possible.



**Thomas Lutze, Member of the German Parliament**

Representative of Die Linke on the Tourism Committee

Few sectors have suffered as much from the effects of the pandemic as the hotel, restaurant and travel industry. As a socialist opposition party within the German parliament, we have supported any measures designed to help safeguard jobs and businesses. Although the coronavirus pandemic is still ongoing in the new legislative period, it appears that vaccination programmes are able to control it to such an extent that the industry will not face any further shutdowns in the immediate future.

Now is the time to look to the future, and to take the opportunity offered by the reopening of tourism in Germany and abroad to effect positive changes towards more sustainability, better working conditions and improved wages. One lesson from the pandemic is that it is very easy to lose large numbers of employees – just ask the hotel and restaurant industry – but it is very hard to replace them afterwards. Politics can play a role here, through greater support, more research and more dialogue with the industry.



**Anja Karliczek, Member of the German Parliament**

Spokesperson on Tourism Policy for the CDU/CSU in the German Parliament

The tourism industry is facing a threat to its very existence, and the CDU/CSU parliamentary group will strive to ensure that it receives absolutely everything required to restore its pre-pandemic status as an engine of job creation. In the longer term, we must maintain Germany's position as a modern, safe and attractive travel destination in the international travel market and public perception generally. This can only be achieved by providing favourable political conditions.

The German National Tourist Board makes a valuable, innovative contribution here, which we have already supported in previous legislative periods. Experts are unanimous in predicting enormous pent-up demand in the post-pandemic period, particularly in international tourism. We want Destination Germany to be ready to meet this demand. That means businesses will require a reliable basis for planning, and that attractive and sustainable local infrastructure must be developed (including a local transport strategy aimed specifically at tourists), while SMEs in particular need support to embrace the opportunities offered by digitalisation. Crucial areas to be addressed include the digital management of visitor flows at certain destinations, modern guest and booking management systems and a comprehensive provision of digital services for all tourists.



**Nico Tippelt, Member of the German Parliament**

Spokesperson on Tourism Policy for the FDP in the German Parliament

Germany needs new answers. The new German government intends to modernise and digitalise the country, and make it more sustainable. The tourism sector is included in this drive for renewal. As a specific example, one of the FDP's demands included in the coalition agreement is to remove the requirement for analogue registration of tourists' overnight stays from the Federal Act on Registration. We hope that, pretty soon, the whole registration process will be entirely digital.

2022 holds the promise of life after the pandemic. The GNTB is an important partner in the revival of tourism both to and within Germany. For me personally, as a member of parliament for one of the newer federal states, it is important that in future there should also be a strong focus on rural areas.

Some cultural sites in eastern Germany still don't enjoy the wider recognition they deserve and should be marketed more intensively at home and abroad. UNESCO's World Heritage sites and Global Geoparks also need to be promoted more effectively as tourist attractions. The establishment of a sustainable tourism infrastructure is an important factor for economic development across Germany.

I know that after two years of coronavirus, the many businesses that make up the tourism industry – from the hotels, restaurants and coach operators all the way to the travelling funfairs – as well as the many people they employ – are relying on us. The SPD endeavours to represent all stakeholders within this diverse industry, and to secure its future, and I will work tirelessly towards that aim.



**Stefan Zierke, Member of the German Parliament**

Spokesperson on Tourism Policy for the SPD in the German Parliament

While we must continue to improve the competitive position of the German travel industry, we also need to help the sector to reboot. This will include raising the minimum wage to €12, which will benefit current and future employees as well as businesses. My particular focus is on new incentives, on modernisation in the shape of digital tools, such as electronic registration forms, and on a boost for tourism segments like cycling, walking, camping and water-based activities. All of this will also help to attract more visitors to Destination Germany at international level.

Over the next four years, the main aim of tourism policy must be to revive Germany as a tourist destination. We need to put the paralysis caused by the pandemic behind us and provide political support to the travel and hospitality industries as the sector reboots. That primarily involves planning certainty for businesses and an end to the constant stream of new restrictions on tourism every time there is a rise in the infection rate. Furthermore, we need to help the tourism industry to increase its resilience against external crises. We aim to speed up the sluggish expansion of Germany's digital infrastructure and include Tourism 4.0 in German funding programs to enable the sector to compete effectively in the global market.

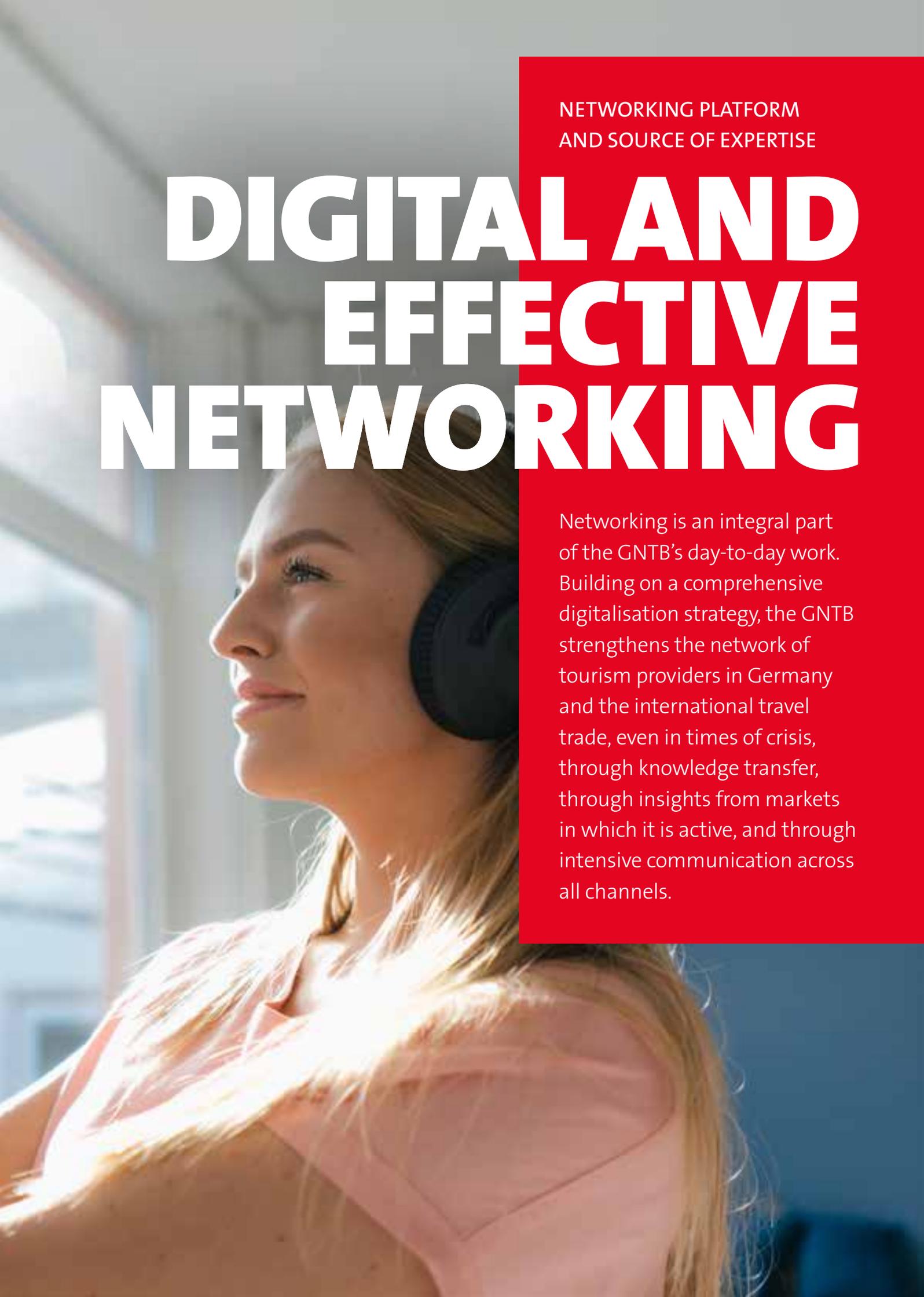
Finally, the AfD will do its utmost to ensure that smaller players in the tourism sector are not squeezed out by global travel conglomerates and big-name booking platforms.



**Sebastian Münzenmaier, Member of the German Parliament**

Spokesperson on Tourism Policy for the AfD in the German Parliament





NETWORKING PLATFORM  
AND SOURCE OF EXPERTISE

# DIGITAL AND EFFECTIVE NETWORKING

Networking is an integral part of the GNTB's day-to-day work. Building on a comprehensive digitalisation strategy, the GNTB strengthens the network of tourism providers in Germany and the international travel trade, even in times of crisis, through knowledge transfer, through insights from markets in which it is active, and through intensive communication across all channels.

# DIGITAL STRATEGY FOR THE FUTURE OF INBOUND TOURISM TO GERMANY

The COVID-19 pandemic has accelerated a number of developments within the international travel industry, leading to the fast-tracked implementation of specific applications, particularly in the area of digital transformation. This vindicates the GNTB’s strategic approach to define digitalisation as one of its key development themes. As a digital pioneer, the GNTB employs new technologies in its own operations, while as a partner of the German tourism industry, it shares its expertise, and endeavours to boost the position of Destination Germany in the global market through digital means. The GNTB acts in close coordination with the decision-making processes of the German government.

## DIGITALISATION OF TOURISM OFFERINGS



Almost **3/4** OF GLOBAL TRAVELLERS attach great importance to **DIGITAL TOURISM OFFERINGS**

### TOP 5 DIGITAL TOURISM OFFERINGS GLOBALLY

-  1. Online booking via apps<sup>1</sup>
-  2. Digital payment
-  3. Contactless digital check-in
-  4. Digital guidebooks
-  5. Control of tourist flows via apps

Source: IPK International, October 2021. <sup>1</sup> Such as tickets, museums, sights, restaurants, car parks  
© German National Tourist Board, [www.germany.travel](http://www.germany.travel)



The GNTB continuously monitors digital megatrends and developments, including immersive technologies such as virtual reality (VR), augmented reality (AR), mixed reality, developments in the field of mobile location data, the evaluation of mobile cell data to analyse the frequency of visitors entering Germany or attending events or locations, and the use of conversational interfaces and artificial intelligence (AI) applications, for example machine learning.

It assesses whether the knowledge gained can be applied to the tourism value chain and shares this knowledge with its partners in the German travel industry.

Working with the regional tourism marketing organisations and many other project partners, the GNTB promotes the innovative and responsible use of data and the development of a powerful data infrastructure, thereby improving data expertise within Germany's inbound tourism sector through its open data project.

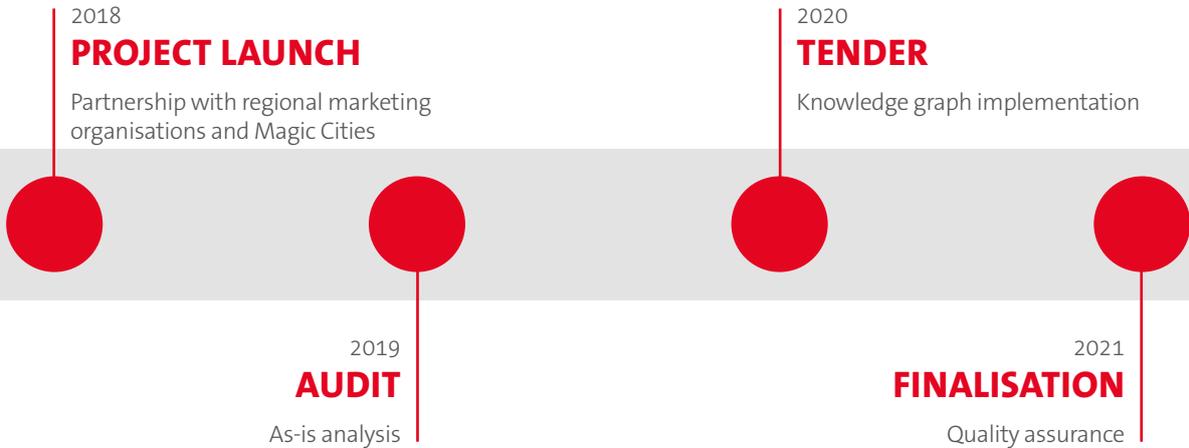
Newly developed pilot projects are being implemented in the international marketing of Destination Germany. This includes the integration of new tools provided by the social media networks.

The GNTB is responding to the changing structures in travel sales by working closely with global online travel companies (OTCs) on cross-media and macro-regional campaigns.

In this way, the GNTB provides the means for its partners in the German travel industry, which mainly consists of small and medium-sized enterprises, and the destination marketing organisations representing German holiday regions to successfully position their products in the global market.

To effectively support its partners in dealing with the growing technological requirements of a globally connected travel sector, in particular with AI applications, the GNTB is coordinating the German tourism industry's open data project.

## MILESTONES OF THE GNTB'S OPEN DATA PROJECT



### TECHNOLOGICAL EXPERTISE: GNTB PUSHES FORWARD WITH OPEN DATA PROJECT

Whether it's in industry, science or public administration, data is one of the most valuable resources of an economy. It is the fuel that drives digital processes and business models. Without data, global logistics would grind to a halt – including the movement of people and hence the tourism industry.

In terms of tourism marketing, this means sharing semantically structured data between different organisations. The objective is to increase the visibility of tourism products on global marketing platforms that are already using AI to target available offers at specific potential customers. It also opens up opportunities for start-ups to make use of new, AI-based business models and services, and thus for added economic value. At the same time, the data allows Destination Germany to develop in a more sustainable way, for example through the intelligent management of visitor flows.

Since 2018, the GNTB has been coordinating the German tourism industry's open data/knowledge graph project, which is laying the foundations for AI to be systemically utilized for the benefit of the tourism sector.

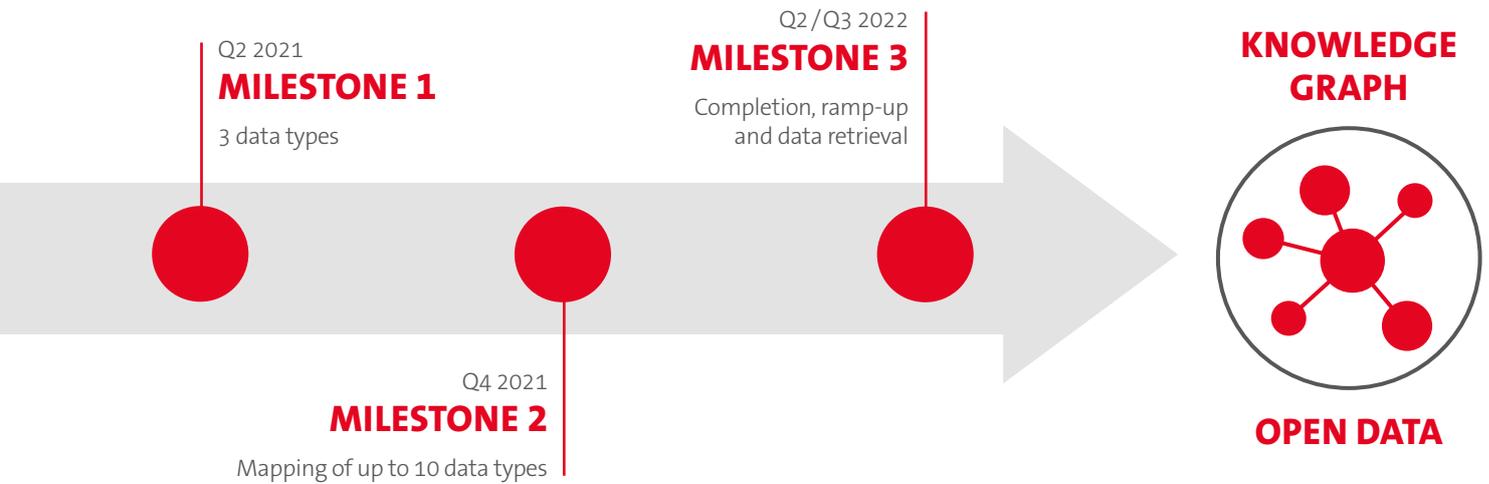
The linking and merging of semantically labelled data, in particular, paves the way for new business models that go far beyond the traditional and rigid understanding of the



roles of supply and demand. Complex tourism products can be much more highly differentiated, and their components much more closely integrated. This goes as far as allowing mass-customised offers that exactly meet a customer's individual requirements while also taking account of relevant general parameters, from weather forecasts and traffic to the current number of visitors at a specific point of interest.

Based on this digitally supported service concept, the GNTB is defining the future positioning of Destination Germany in the global travel market.

# open-data-germany.org



## OPEN DATA TOURISM ALLIANCE

In 2021, the GNTB initiated an organisational unit with a European focus to promote the standardisation and digitalisation of tourism services in Europe across national boundaries. The Open Data Tourism Alliance (ODTA) aims to standardise semantic data models for tourism information at international level, based on the schema.org standards. It also facilitates the exchange of information across borders, which means that organisations can share their experiences of using structured data and semantic technologies, for example in relation to voice search. With their broad position-

ing, the ODTA partners will not simply react to technological developments but instead actively help to shape them for the tourism industry.

The ODTA currently consists of the national tourist boards of Germany, Austria, Switzerland and Sweden, along with 20 partners at federal level. Discussions are ongoing to extend the ODTA to include tourism organisations from the United Kingdom, Belgium and France. There is a separate body through which technical partners can be associated.



Screenshot from open-data-germany.org

## SOCIAL MEDIA: GNTB CAMPAIGNS ACHIEVE GREATER REACH

The number of active social media users in 2021 rose by 13 per cent globally to 4.4 billion. The GNTB took advantage of the surge in use to systematically expand its already strong presence on the social networks. This move from print to digital media represents another contribution to sustainability.

### SOCIAL MEDIA MARKETING IN 2021

Over

**2.7 billion**  
IMPRESSIONS

More than

**222 million**  
INTERACTIONS

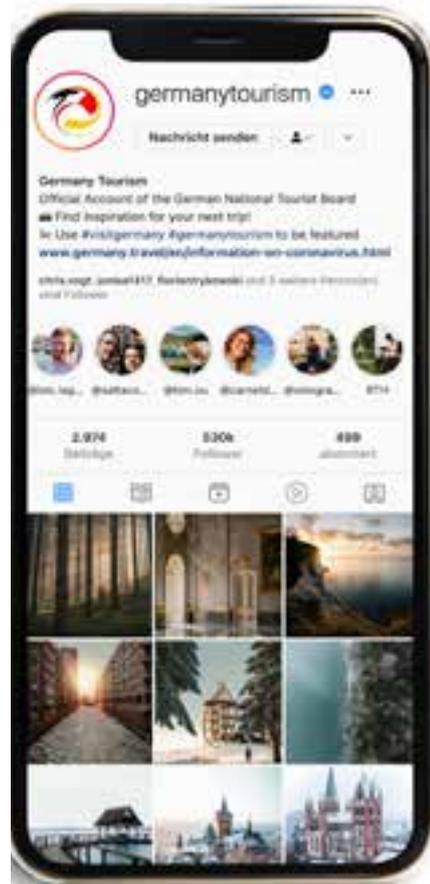
More than

**6.6 million**  
CLICKS

**426,000**  
PEOPLE reached  
organically every day



New look for GNTB Pinterest profile



GNTB Instagram account

## GNTB IS NOW ACTIVE ON A TOTAL OF NINE SOCIAL MEDIA PLATFORMS

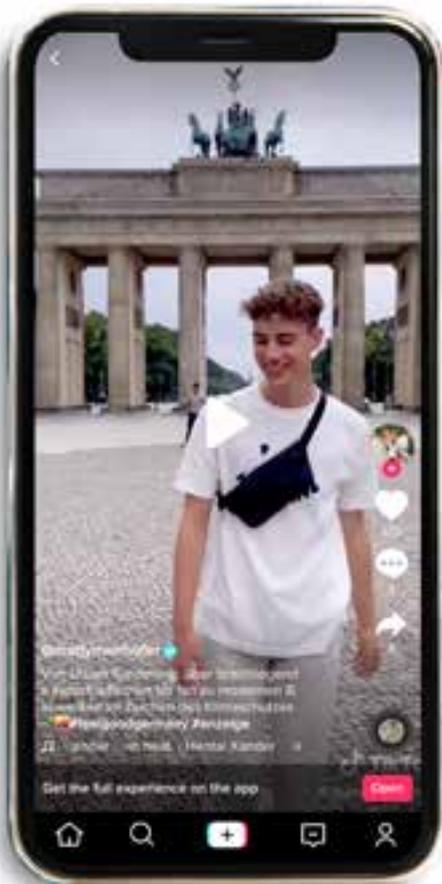


### Promising launch on TikTok

The video platform TikTok has very quickly become one of the information channels with the greatest reach. In September 2021 alone, it was downloaded 28 million times globally, with the number of downloads at that point totalling 2.6 billion. TikTok currently has more than one billion active users a months – these are primarily younger people looking for a quick fix of entertainment. The latest trends and the opinions of influencers play an important role.

The GNTB began its TikTok communications in 2021, by running paid peaks relating to the German.Local.Culture. theme on the video platform. In future, the plan is to also run content organically and make greater use of creator partnerships across the board.

**18.3 MILLION VIDEO VIEWS**



GNTB creator campaign on TikTok

### Strong global Instagram account

The number of followers of the GNTB Instagram account broke the half a million mark for the first time in September 2021. Currently, the average reach per post is 90,000. At 9.9 per cent, the Instagram account has the highest engagement rate of all social media channels used by the GNTB.

### Successful Pinterest ad campaigns

The GNTB Pinterest profile was given a makeover in 2021, and was accessed more than 61 million times that year.

Pinterest ads supporting global GNTB campaigns, such as Feel Good and German.Spa.Tradition, generated 58 million impressions.

## SOCIAL MEDIA TRENDS

TRANSPARENCY  
AND RESPONSIBILITY

SUSTAINABILITY

VOICE MARKETING

CONTENT REMIXING  
AND RECYCLING

CONVERSATIONAL  
INTERFACES

AUDIO EXPERIENCES

GAMIFICATION

## MARKETING: GNTB BRINGS IN NEW COMMUNICATION TOOLS

For its marketing activities, the GNTB draws on the practical experience it gains from pilot projects and trend analysis. In 2021, this led to it incorporating even more technological innovations into its digital toolbox, many of which are already available for use in partner collaborations.

### Live streaming

Up until now, live streaming has rarely been used in Germany as a communication tool. In China, however, it is already an established format for communicating with end customers. Live-streaming events essentially provide an opportunity to show-case products online and to interact with viewers directly.

The GNTB in China has launched 24 events in total across six different online platforms. These focused on three main themes: *#Germany's towns & cities* with a virtual tour in twelve locations, the *#Travel+* talk show and *#German food & drink*.



Live streaming by GNTB China at the municipal library in Stuttgart

### Smart TV: pilot project for the US market

More than 80 per cent of households in the US already have televisions with internet interfaces (smart TVs or CTVs – connected or hybrid TVs, source: eMarketer.com). These can be used to deliver personalised advertising that directly appeals to the interests of individual viewers.

From 2019 to 2021, spending on CTV advertising in the US more than doubled from US\$ 6.4 billion to US\$ 13.4 billion, making this the fastest-growing digital advertising market.

As part of its Feel Good campaign, the GNTB is using smart TV advertising in the US for the first time. The objective is to use programmatic buying options to reap the benefits of scaled targeting and to exploit the greater degree of flexibility compared with analogue TV advertising.

### Innovative mockumentary-style storytelling

Video is increasingly prevalent on social media. The GNTB is using a mockumentary-style format for the first time in its version of the Feel Good campaign for the Danish market. The videos will show two comedians playing a classic odd couple who embark on a fictional trip to Germany, explore the country's destinations and talk about their experiences.

Up to six ten-minute episodes are planned, which will be available on the GNTB's YouTube channel and TikTok.

## CONVERSATIONAL INTERFACES: GNTB STEPS UP USE OF VOICE TECH

The rapid rise in sales of smart speakers has led the GNTB to launch pilot projects over the past two years to look into possible applications for potential travellers.

### Improved voice applications for smart speakers

It is essential for the 'skills' to offer USPs such as exclusive content with a user experience, which is why the GNTB decided to relaunch its German Bread Culture voice app. This gives users access to 16 traditional baking recipes from Germany. It also provides tips on places to visit and information on typical attractions in each federal state.

In addition, the GNTB developed the German Travel Secrets app in 2021, which provides travel tips and information on lesser-known sights all across Germany, and can be accessed using Alexa and other smart speakers. Podcasts and audio experiences are integrated into the content, and a link to the knowledge graph is also planned. Roll-out is scheduled for 2022.



## CHATBOT PROVIDES INSPIRATION FOR GERMAN.LOCAL.CULTURE.

As part of its international German.Local.Culture. campaign, the GNTB used a chatbot for the first time to directly communicate with customers. It was introduced in 2021 in 15 countries and in 13 different languages. The chatbot will remain part of the campaign as it continues into 2022.

Over **50,000**  
CONVERSATIONS

### AI chatbot now also in German

As part of its #DiscoverGermanyFromHome campaign, the GNTB used an AI-supported chatbot for the first time to answer customer questions on the English-language websites at [www.germany.travel](http://www.germany.travel). After positive results, the GNTB extended the range of the application in 2021 to include more than 60 topics as well as the option for German-language customers to receive individual advice.



German.Local.Culture. chatbot

## IMMERSIVE TECHNOLOGIES: AUGMENTED REALITY (AR) AND VIRTUAL REALITY (VR)

### AR filters in social media applications

Social ads incorporating AR filters had already proved effective when they were used in Facebook advertising in 2020. Building on this positive experience, the GNTB added an element of gamification to its Facebook approach. The new face filters, available since November 2021, allow users to pose in front of four different castles and complete a short quiz on each one.

### Virtual reality application shows natural landscapes in a new dimension

The GNTB has already had considerable experience with first-generation VR applications, which it has shared with its partners. However, the capabilities of VR glasses have become increasingly sophisticated. The move from tethered to stand-alone VR headsets, in particular, represents a para-

digm shift within the immersive ecosystem. With these, the viewer can not only watch a video in 360°, but also move freely within and interact with the application, both physically and digitally.

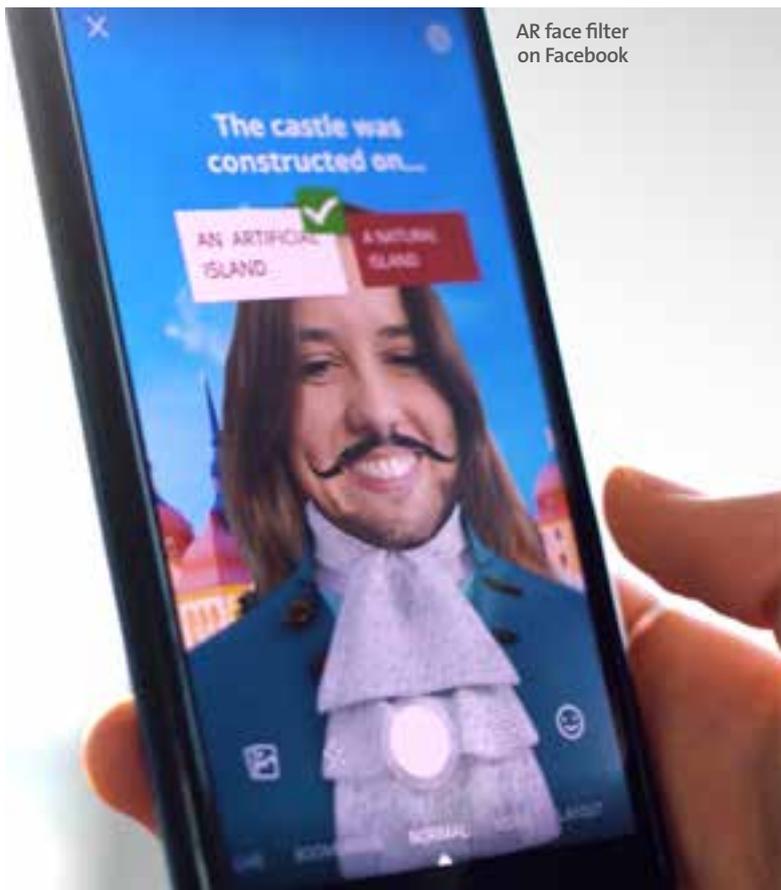
In 2021, the GNTB began to develop a new VR experience themed on Germany's natural landscapes, making full use of all the latest technology. The app provides a stunning rendition of Germany's natural landscapes and options for interactive experiences.

### Use of augmented reality at live events

At PR events and other GNTB events in different markets, attendees were greeted by an authentic and historically accurate representation of the great composer Ludwig van Beethoven in augmented reality.



360° cycling video at GLC event in Slovenia, June 2021



## ARTIFICIAL INTELLIGENCE: STATUS REPORT

Artificial intelligence (AI) is now one of the most prominent drivers of technology in the digital revolution. The GNTB is involved in developing and delivering AI solutions to ensure that Germany's inbound tourism industry remains highly competitive at international level.

The GNTB shares its specialist knowledge on technological innovations with its network of industry partners so that it can support the development of practical applications. With the publication of its magazine 'Artificial intelligence in Germany's inbound tourism industry', the GNTB produced its first comprehensive overview of the topic.

Learning systems are already making processes for companies and travellers safer, faster and more efficient and are bridging the gap between future technologies and the present day.



## KNOWLEDGE DAYS

Keynote speaker Frank Thelen – entrepreneur, tech investor and author of the best-selling book '10 x DNA: Mindset for a Thriving Future' – presented his views on digitalisation as being the start of the biggest revolution in human history at the 2021 Knowledge Days.

Knowledge Days, 23–24 June 2021  
**HOW IS THE DIGITAL TRANSFORMATION INFLUENCING TOURISM NOW, AND WHAT WILL ITS IMPACT BE IN THE FUTURE?**



In addition, experts from the GNTB and distinguished guest speakers from tech companies such as Triplesense Reply, Onlim, Talkwalker and TikTok gave talks on the latest trends and technological innovations, future scenarios, and the practical application of digital tools under the heading 'Rethink & Unlock: using digital technologies in tourism'.



**Frank Thelen**

Entrepreneur, tech investor and author

*"We will travel a lot, more than we did before. But this will have to be carbon-neutral. Through off-setting initially and in the medium-term as the use of fossil fuels wanes ... People will have an even greater desire for travel experiences in the future ... Travel inspiration and bookings will be highly digitalised... In the process, data exchange in Europe will be extremely important for the success of the industry."*

# BUSINESS PARTNER FOR THE MARKETS AND IN THE MARKETS

Year two of the pandemic posed further challenges for the German travel industry. The ever-changing parameters called for a much more nuanced approach to the markets and their individual segments. The GNTB continually adapted its marketing activities to meet these demands. It swiftly tapped into the potential for recovery by sharing the latest information on market conditions, and initiated in-depth exchanges between international key players and German partners. New communication formats were developed for this and existing ones were adapted as required. Sustainable digital transformation was the focus for the restart.

## NETWORKING AND SALES IN DIGITAL FORMATS

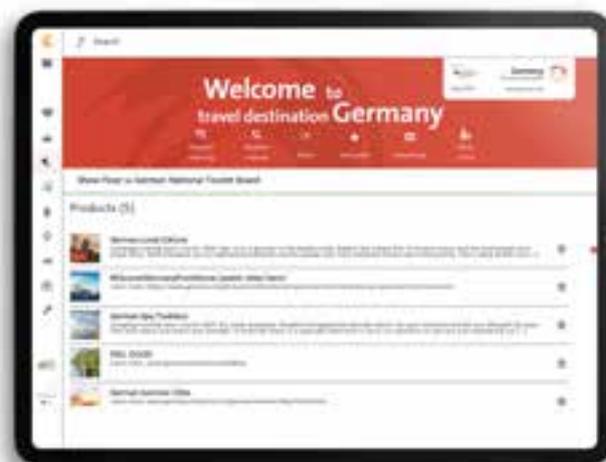
In the early part of the year, the lockdown meant that there was a greater focus on digital formats in marketing activities. The GNTB and its foreign representative offices put their digital toolkit to full use – organising everything from webinars and hybrid events to online networking and one-to-one virtual meetings – to maintain contact with their German partners and ensure that everyone had the information they needed.

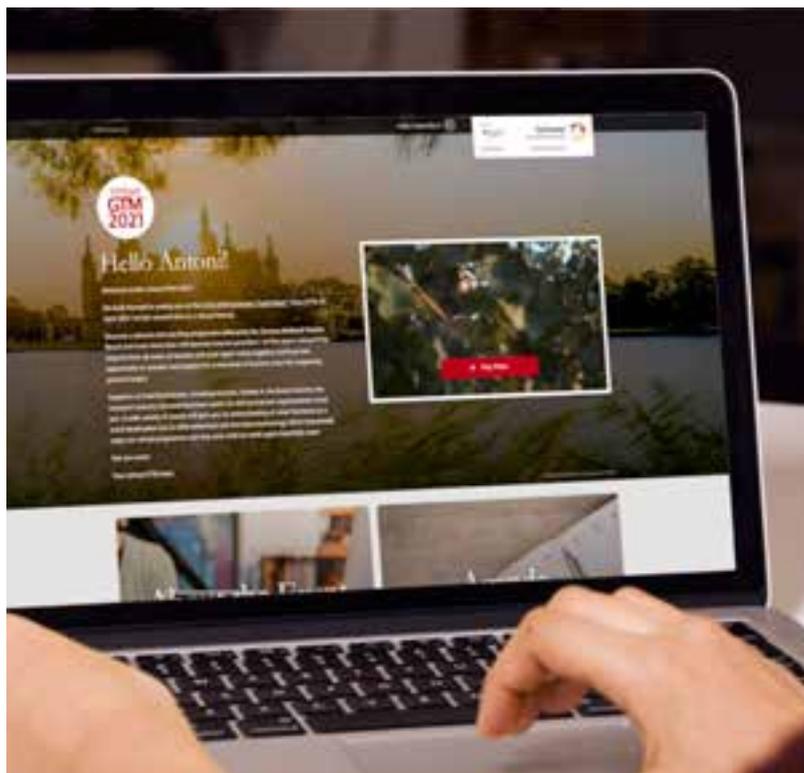
## ITB NOW 2021 – A KEY INDUSTRY PLATFORM FOR THE REOPENING OF TOURISM

In collaboration with its partners, the GNTB presented Germany as a travel destination at the ITB Berlin NOW trade fair. At its virtual stand, it focused on the marketing strategy for Germany's inbound tourism industry during and after the pandemic, with the aim of providing people from around the world with even more inspiration to travel to Germany as the country begins to welcome visitors again.

During the four-day event, the GNTB's virtual stand was open around the clock for speed networking, individual meetings and group discussions.

In addition to its own events and the presentation on Germany at its virtual stand, the GNTB was called upon to take part in numerous panel discussions and talks on the future of tourism.





Impressions from the vGTM 2021

## OPTIMISM AT THE VIRTUAL GTM GERMANY TRAVEL MART™ 2021

As event organiser, the GNTB was able to open the GTM Germany Travel Mart™ with optimism following positive assessments from the international delegates. In an online survey conducted by the GNTB, 95 per cent of the respondents indicated that Germany would be at least as attractive to visitors as a travel destination as it was before the pandemic.

Almost 250 German companies from the hotel, transport and leisure industry, inbound services and regional tourism organisations, plus around 500 buyers from international and online travel companies used the digital platform, from 27 to 29 April, to negotiate deals for the coming year.

96 per cent of delegates were able to forge new business contacts at the vGTM, and 90 per cent hope to return to the GTM in 2022.



**6,500**  
**ONLINE MEETINGS**  
for the travel industry

## MARKET DEVELOPMENT AND EFFECTIVE PARTNERSHIP WITH THE KEY MARKETS

### Market insight webinars – a new series of digital events for members and partners in Germany’s travel industry

The GNTB’s new virtual event format for members and partners in the German travel industry provides market-specific expertise to support participants with targeted marketing activities. In collaboration with the GNTB’s foreign representative offices, local guest speakers and experts from the markets impart insider knowledge, which is not available elsewhere on the market in this format. This includes everything from recovery strategies to local studies and analyses.



# Webinars

FOR MEMBERS AND PARTNERS FROM THE GERMAN TRAVEL INDUSTRY



**43** TOURISM EXPERTS speaking

More than **1,500** ATTENDEES

# Digital formats

FOR THE INTERNATIONAL TRAVEL INDUSTRY

**22** TRADE WEBINARS with more than **1,000** ATTENDEES

## GNTB CAMPAIGNS KICK-OFF & SPEED NETWORKING

At the webinar on 8 and 9 September 2021, the GNTB provided information on the campaigns planned for 2022, namely German.Local.Culture, Feel Good and Embrace German Nature. The GNTB followed up the webinar with a virtual speed-networking event, at which participants were able to plan marketing activities for 2022 in consultation with the individual foreign representative offices. New consumer behaviour has been taken into account in the restart strategies.

Around **200** ATTENDEES **275** MEETINGS



Presentations, panel discussions and TED talks were on the agenda at the Industry Day of the GNTB's US Advisory Board Meeting

## IN-PERSON EVENTS IN GERMANY AND THE MARKETS

In late summer of 2021, in-person events were once again possible thanks to the relaxation of restrictions. The GNTB used this opportunity to run scheduled workshops, roadshows and events in accordance with applicable hygiene rules.

### 2021 US Advisory Board workshop predicts opportunities for the restart

At the US Advisory Board workshop in Stuttgart on 20 October 2021, senior managers in the US travel industry and more than 80 participants from German travel companies, destination marketing organisations, inbound tourism agencies and other tourism service providers discussed current trends, opportunities and challenges in the US market.

Keynote speaker Terry Dale, USTOA President & CEO, and TripAdvisor's Steven Paganelli, Director of Destinations, Hotels

and OTAs for the Americas, stressed the importance of close collaboration between the partners in Germany's inbound tourism industry and trade experts. The workshop provided an opportunity to discuss the challenges of the restart and to seek advice on changing customer expectations.

The US managers hoped that the Oberammergau Passion Play in 2022 will further boost demand. For many providers, this major event is a highlight of Germany's cultural calendar.

**150** GERMAN PARTNERS INVOLVED

Around

**1,000** INTERNATIONAL PARTICIPANTS



## Overview of other in-person events, roadshows and workshops in 2021

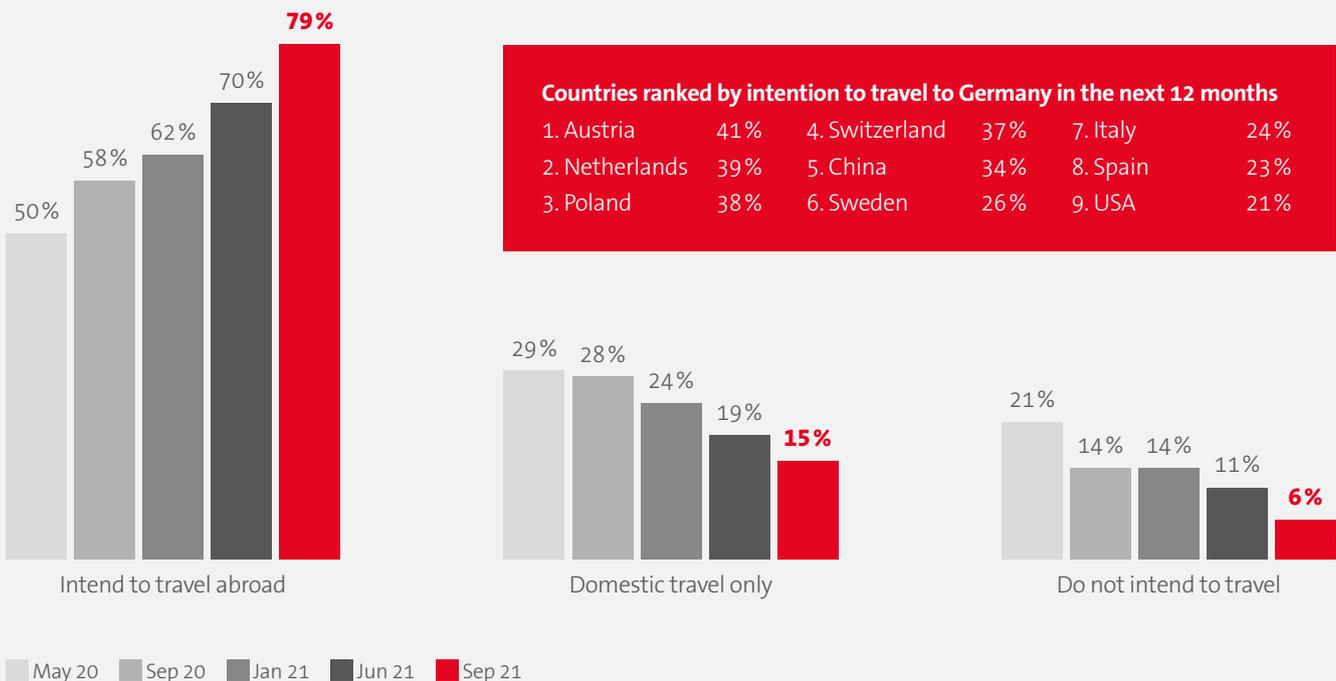
COUNTRY	DATE	EVENT
Arab Gulf States	14 – 15 May	Marhaba Europe Workshop Dubai
Arab Gulf States	16 – 19 May	ATM Dubai
Switzerland	1 September	GNTB workshop Zurich
Austria	21 – 22 September	GNTB roadshow in Vienna and Linz
Italy	28 – 29 September	GNTB workshop Destinazione.Vacanze 2021 in Milan and Padua
Balkans	4 – 8 October	GNTB roadshow in Bucharest and Zagreb
Poland	21 October	GNTB workshop in Katowice
Northern Europe	26 – 29 October	GNTB workshop in Aarhus and Copenhagen
Spain	10 – 11 November	GNTB workshop Meet Germany 2021 in Madrid and Barcelona
Belgium	17 November	GNTB workshop
South Korea/Japan	8 – 12 November	German Travel Week
International trade fair	6 – 9 December	ILTM in Cannes

# BUSINESS INTELLIGENCE FOR EVIDENCE-BASED MARKETING

A wide range of information is needed to produce innovative, successful and evidence-based marketing for Germany as a travel destination – from market knowledge, trends and perspectives, data analysis, research and publications to the definition of topics for the future and their practical application in business processes. The GNTB’s Business Intelligence (BI) unit, which was restructured in 2020, supports key business decisions through its analysis of inbound tourism. The focus is on strategic considerations for the restart that take sustainability and digitalisation into account.

## SIGNIFICANTLY HIGHER DESIRE TO TRAVEL ABROAD

Ongoing monitoring and analysis of the source markets during the coronavirus crisis underpins evidence-based marketing



Source: IPK International GmbH, 24,000 representative online interviews with international travellers (travelled repeatedly in the last three years) in 18 source markets (Europe, Americas, Asia), survey dates May 2020, September 2020, January 2021, June 2021, September 2021.

Data is recorded, collected, analysed and linked via an extensive network of partners. Long-term partnerships ensure continuity and the stable availability and reliability of data, while

ad-hoc field research enables accurate evaluation of temporary developments and events, for example during the pandemic. Market-specific surveys by international analysts provide a bet-

ter understanding of customers in the source markets. The analysis and aggregation of digital data sources with a high number of cases and short lead times ensures a high degree of proxim-

ity to market events. Economic, technological and social trends are evaluated and related to factual findings.

In 2021, the GNTB commissioned and analysed numerous international surveys to support the German tourism industry with its recovery. These included Destination Brand 20 by market research company inspektour in collaboration with the German Institute for Tourism Research at the FH Westküste University of Applied Sciences;

several waves of the IPK International study of the impact of COVID-19 on international tourism; the European Travel Commission's travel sentiment survey; the Anholt-Ipsos Nation Brands Index (NBI) and the meetings and events barometer.

The GNTB utilizes information from the Business Intelligence unit to adjust its activities in the markets. It shares knowledge with its partners in the tourism sector via a range of commu-

nication channels to help them access international markets.

The GNTB presents a structural analysis of inbound tourism in its annual Facts and Figures publication. This market information summary provides an overview of all relevant figures from key source markets. Both publications can be downloaded from the website [www.germany.travel](http://www.germany.travel).

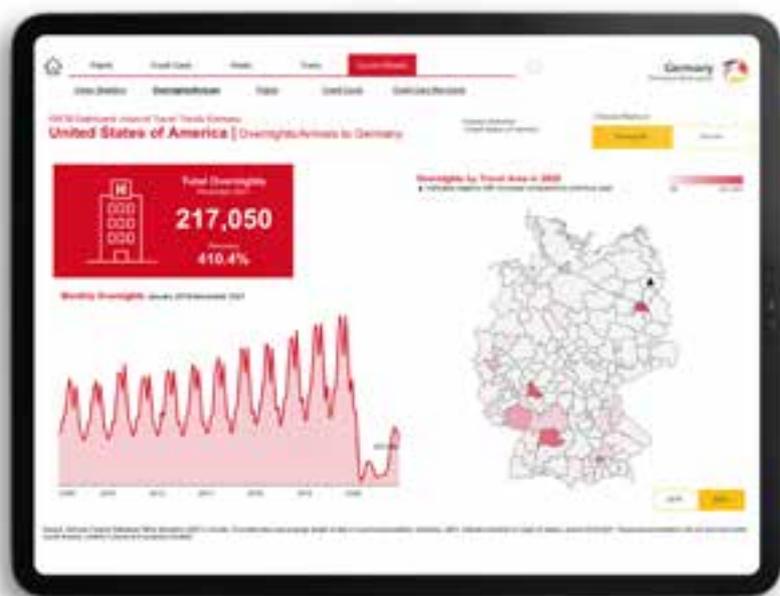
## NEW DATA ANALYSIS DASHBOARD IMPROVES KNOWLEDGE SHARING WITH GNTB MEMBERS

To support its members with the restart from the coronavirus crisis, the GNTB developed the Inbound Travel Trends Germany (ITTG) dashboard in 2021, which provides clear, direct access to a variety of digital data sources that are otherwise not accessible or only at a high cost.

In addition to conventional market analyses, such as overnight stays and arrivals figures for previous months, the GNTB also incorporates other data sources in ITTG as soon as possible. For example, monthly flight data from over 160 source markets is available in the dashboard with a time lag of only ten days or so. Other data sources such as sales of train tickets to Germany, data on hotel occupancy and pricing, structural data on source markets and data on spending behaviour at the point of sale provide a complete picture of the current situation in inbound tourism to Germany.

All of this data is presented in an innovative way on a visual analytics platform. Using this single source of facts, decision-makers can adapt their marketing activities even more precisely and efficiently to ever-changing external factors.

The data available in the ITTG dashboard represents the pure facts (transactional data). The Business Intelligence unit also provides further international research (behavioural data) to support the GNTB's many high-quality publications, from press releases, blogs and market assessments to commentaries.



The processing of business intelligence data in the ITTG dashboard enables the user-friendly visualisation of a wide variety of information in a single window. The data is continuously updated.

# HIGH MEDIA RESPONSE THANKS TO MULTI-CHANNEL COMMUNICATION

To support the recovery process, the GNTB added new formats to its marketing activities and stepped up the global dialogue with all target groups in its existing channels. Despite the lockdowns in many countries, it provided continuous and consistent information for media representatives, stakeholders and partners in the international travel industry and in tourism in Germany. It used targeted PR activities to support its global theme-based campaigns.

## Up-to-the-minute business content on social media

The GNTB published up-to-the-minute business content on social media for its partners in the international travel industry and in tourism in Germany. This included articles on the latest market insights, research findings, trends from the source markets and industry news.



@DeutscheZentraleFuerTourismus



@gntblive



@Deutsche Zentrale für Tourismus e.V.

## Successful media work in the markets expanded

Despite the travel restrictions in many source markets, the GNTB's 27 foreign representative offices ensured that awareness of the Destination Germany brand remained high. Press releases and press newsletters kept the media informed about the latest travel topics. In press conferences and press briefings, the PR experts at the foreign representative offices increased media interest in Germany, in the GNTB's campaign themes and in story ideas. PR events and workshops supported the high-quality media coverage of Germany as a travel destination. Overall, the GNTB's conventional media work generated almost 10,000 features in all major communication channels.

Communication of sustainability in Destination Germany was ramped up further in 2021. Examples of best practice were presented to international journalists on press trips, and offerings were showcased in press releases and newsletters. As part of its communication activities for the ITB, the GNTB ran an online sustainability event for over 600 participants.

The GNTB also made use of the opportunities presented by the growing number of options for accessible tourism. A social media live stream reported on the GNTB's annual Barrier-free Tourism Day to raise awareness of this topic. Accessibility was a theme of the global PR activities, and journalists were able to try accessible offerings for themselves on a barrier-free press trip.

## Press trips showcase sustainable experiences in Destination Germany

The GNTB ran 88 press trips, where over 160 selected journalists from 15 countries had the opportunity to experience Germany's authentic tourism offerings at first hand. The focus was mainly on the themes of the major global campaigns German.Local.Culture. and German.Spa.Tradition, the Feel Good sustainability campaign, and barrier-free travel. Extensive reporting with more than 280 features reflects the positive response of the participating journalists.

Reach of GNTB press trips  
**OVER 1 BILLION CONTACTS**



GNTB press trip in Brandenburg, Saxony and Berlin, October 2021

## DIGITALISATION THE FOCUS OF B2B COMMUNICATION

### New podcast

#### On the MIC with Petra Hedorfer

To keep the travel industry up to date with business opportunities and important trends for the future, the GNTB launched the 'On the MIC with Petra Hedorfer' podcast in 2021 as an additional digital format. In it, Ms Hedorfer speaks to leading international experts about market-specific challenges and topics that are set to shape the future of inbound tourism.

#### The first episodes focused on:

- The US market – the latest trends in Destination Germany's most important overseas market
- China – opportunities in the world's biggest travel market
- UK – successful marketing in a digital-forward country
- Scandinavia – the importance of sustainability to the inbound tourism business



### CEO blog 'From the desk of Petra Hedorfer'

Extensive background analysis, market predictions and personal assessments of trends are the focus of the 'From the Desk of Petra Hedorfer' CEO blog, which also features direct links to external studies and analysis. The blog's key themes in 2021 included the positioning of Germany as a travel destination with sustainable offerings, opportunities presented by the restart for inbound tourism to Germany, and the digital transformation.

### 'Artificial intelligence in Germany's inbound tourism industry' magazine

In this magazine, the GNTB presented the industry with a comprehensive overview of the future of AI applications in tourism. Experts from politics, research, industry and the 16 regional marketing organisations analysed the integration of AI into the tourism value chain, and the legal framework for, and ethical principles of, implementing AI systems.

# Which digital marketing activities are you using to aid the recovery of international markets for German tourism?

## Where do you see the greatest potential for inbound tourism to Germany after coronavirus?



**Carmen Dücker**

CEO, BWH Hotel Group Central Europe GmbH

**Best Western Hotels** – Our aim is to stay top of mind for our customers and have a close relationship with them, while also respecting their privacy. To achieve this, we are focusing even more on our loyalty programmes and first-party data. We firmly believe that transparency and honesty in terms of customer data will continue to pay huge dividends.

In all our marketing activities, we have continued to break new ground and offer a creative response to an ever-changing world. From flash campaigns in which our hotels offered their facilities to schools or people needing to work remotely to new long-stay offers, storytelling around some of our top destinations and our new podcast, 'Wherever Life Takes You – Stories by Best Western'. Individual content such as up-to-date COVID-19 information on our own websites sets us apart from the OTAs' standardised content, which is exactly what our guests want and appreciate.



**Marcus Bernhard**

CEO, Deutsche Hospitality

**Deutsche Hospitality** – We are relying on our tried and tested mix of online marketing activities. Newsletter marketing as a means of activating existing customers, for example members of our 'H Rewards' loyalty programme, is another key component here. We also manage our online visibility on a performance basis in line with demand. This involves monitoring the market and the figures daily in order to generate traffic for our hotels effectively and efficiently.

The market will recover in stages. In the first instance, we will get back the incoming business from European source markets, as overland travel will continue to play a major role. International business will recover much more slowly.

**German Hotel and Restaurant Association** – Now, more than ever, we need to use targeted communication and bespoke concepts to reignite international visitors’ enthusiasm for a holiday in Germany. Switched-on social media activities with the right messages undoubtedly have a greater role to play than general newsletters. Direct online marketing by the hotel industry and the GNTB’s digital marketing are other important elements. What is crucial is that we address people directly, with authenticity and creativity.

Aspects such as safety, a focus on service, and quality are ranked highly by international visitors. These are areas where Germany excels – as a welcoming host country and incredibly versatile destination with an excellent tourism infrastructure that offers outstanding value for money. We also need to make full use of our huge potential for sustainable tourism and the related processes.



**Guido Zöllick**

President of the German Hotel and Restaurant Association (DEHOGA)

**Lindner Hotels AG** – Listing the individual measures would go beyond our character limit! We have multiple activities running at the same time, because online you can always be flexible, rapid in your response and have a wide reach. All this helps us maintain reliable and long-term contacts with our sales partners in the B2B and B2C sectors. We see the greatest potential for inbound tourism to Germany in neighbouring countries, and the trend for German staycations will continue, fuelled by a growing desire for safety and sustainable travel. If efforts to contain coronavirus continue to be effective and restrictions are relaxed, we expect demand from the US and the Asian market to pick up quickly. We will therefore work with our international partners on targeted promotional activities for these markets. The German holiday hotel industry in particular had the most successful reopenings in Europe in 2020 and 2021, and this will also be the case this year.



**Otto Lindner**

CEO, Lindner Hotels AG

**Ringhotels e.V.** – Increased digital communication is essential, especially in this time of crisis. We are placing particular emphasis on the various social media channels, as we see this as an opportunity to keep in regular contact and share information with our international guests and partners.

Our focus here is on ‘travelling in your mind’: gathering inspiration and tips for your next stay, bringing a little holiday feeling home and so increasing your desire to make a trip to Ringhotels and to HeimatGefühl by Ringhotels. Another very important communication channel is our website, where we provide the latest news for our leisure and business guests and our partners.



**Susanne Weiß**

CEO, Ringhotels e.V.

Our fellow Europeans in neighbouring countries such as Denmark, Austria and Switzerland have their passports at the ready, just waiting for international travel to be easy again – which would have the obvious benefit for us of jump-starting growth in German tourism. Our guests appreciate the personal and individual service in our hotels, something that will remain in demand from domestic and foreign travellers in the future.



open-data-germany.org

# Which digital marketing activities are you using to aid the recovery of international markets for German tourism?

# Where do you see the greatest potential for inbound tourism to Germany after coronavirus?



**Roland Mack**

Owner, Europa-Park – Theme Park and Adventure Resort

**Europa-Park** – It is clear that the demand for travel destinations in Germany will be particularly high after the pandemic, although for our company, this applies mainly to visitors from Germany and neighbouring countries such as Switzerland, France and the Benelux countries. Europa-Park has grown into a travel destination in its own right since the opening of the Rulantica water world in 2019, if not before. Our current marketing strategy is based on a joined-up approach that extends across the entire customer journey using owned, earned and paid media.



**Norbert Fiebig**

President of the German Travel Association (DRV)

**German Travel Association (DRV)** – Sustainability, the recruitment and retention of skilled workers, and digitalisation: three topics that will be crucial for inbound and outbound tourism alike, as they represent both a challenge and an opportunity.

An intact environment is fundamental to our business, with carbon-neutral mobility the long-term goal.

Workers with the right skills, training and motivation are essential if our industry is to thrive. We need to do even more to advertise the range of exciting career opportunities in the travel industry in order to attract young people in particular to work in tourism.

In terms of digitalisation, the pandemic has been a real wake-up call for us. We have to perform well in all areas – both online and in physical spaces. And we must remain focused on improving our performance by using all the digital tools available to us.



**René Kamm**

Managing Director  
Outletcity Metzingen

**Outletcity Metzingen** – Our source market managers are very active on various social media platforms run by international partners. They give online presentations, network with different stakeholders, and address important target demographics. They are also active in country-specific communities in Germany and even act as influencers themselves. Features such as virtual shopping and live shopping events on proprietary channels help recreate the Outletcity Metzingen shopping experience digitally and offer viewers an insight into our premium and luxury stores and their product ranges.

We believe that sustainability and a sense of closeness to nature, through sustainable urban development and biosphere reserves, combined with the shopping experience are very attractive to many visitors from Germany and abroad.



**Sascha Mayerer**

CEO Historic Highlights  
of Germany e.V.

**Historic Highlights of Germany e.V.** – Historic Highlights of Germany was already using digital channels in the US and China in the first two years of the pandemic to prevent a visibility vacuum from developing.

In 2022, we will continue to use these tools to inform potential travellers and the travel industry about our cities. In the US, we will be launching a digital guide to our cities with Travel Weekly, one of the most important magazines for the travel industry. In addition to the conventional text and image components, there will also be plenty of space for inspiring videos. In China, we will cover the entire service chain with a major initiative, using a gamification approach to provide incentives for the travel industry to launch new routes through Germany, which will incorporate our 17 cities in countless different ways. Tour operators will be trained via webinars. To connect the online and offline world, the best routes will be selected by a panel of judges and presented at two press events.



**Jürgen Schübel**

Head of Merchant Solutions &  
Acceptance Central Europe,  
Visa Central Europe

**Visa Central Europe** – At Visa, we aim to provide consumers and merchants with the best payment experience and seamless transaction handling, whether at home or on the road. This is why Visa supports various partners in promoting and shaping tourism in Germany – including the GNTB and its members. An example of this is the campaign ‘Experience more with Visa’, which will run for the third time this year. We assume that people’s desire to travel will increase again after the end of the pandemic and accompanying travel restrictions, especially in the summer months. An analysis by the Visa International Travel (VISIT) platform reveals that short- and medium-haul cross-border travel rebounded to up to two-thirds of pre-pandemic levels in the summer of last year. It’s no secret that Germany is an appealing travel destination for visitors all over the world. So it makes sense for the German travel industry to prepare for the return of tourists with appropriate offerings, promotions and campaigns. With our campaign, we offer Visa cardholders discounts on accommodation, rental cars and shopping.

**German Tourism Association** – Germany is synonymous with high-quality, individual holidays, rich landscapes, and vibrant towns and cities. Many hosts are responding to more individual travel preferences with coherent and increasingly sustainable offerings. Our coastline, beaches, mountains and riverscapes retain great appeal, including for international visitors. Most of all, we expect our towns and cities to regain their great popularity, because people are keener than they have been for a long time to enjoy a taste of the city, experience culture and connect with one another.



**Norbert Kunz**

Managing Director, German Tourism Association (DTV)

**Mastercard Europe SA** – The last two years have resulted in losses in the billions of euros for the German tourism industry, which must be recouped as quickly as possible. In this context, aggregated, anonymised spending data from Mastercard can help deliver key insights for developing appropriate strategies to revitalise tourism. In the second quarter of 2022, we are opening our new Tourism Innovation Hub in Madrid with the aim of fostering innovation in the industry and building new partnerships that will help advance viable and sustainable tourism.



**Dirk Mühlenweg**

Director of Government Engagement Germany, Mastercard Europe SA

**Maritim Hotelgesellschaft mbH** – We primarily use a well-maintained data pool for sending newsletters and for SEO and SEA activities, retargeting, blogs, video and influencer marketing, and our MyMaritim loyalty scheme. We also focus on collaborative and destination marketing, especially for German holiday destinations and city breaks.

Post-coronavirus, we believe that easy accessibility, infrastructure, attractive cities and landscapes, safe travel and proven hygiene protocols are most likely to boost growth.



**Mark Spivey**

Director International Sales  
Maritim Hotelgesellschaft mbH

MARHABA Europe workshop in Dubai, May 2021



# Which digital marketing activities are you using to aid the recovery of international markets for German tourism?

# Where do you see the greatest potential for inbound tourism to Germany after coronavirus?



**Alexander Schuricht**

General Manager of Avis Budget Car Rental in Germany

**Avis Budget Autovermietung** – Thanks to our Avis Safety Pledge and Budget Worry-Free Promise, our customers can book with confidence in these challenging times. All relevant cleaning processes have been improved, and we communicate this through our digital channels, search and display marketing and CRM activities. At the same time, we highlight facilities such as our digital check-in, which delivers a faster, safer and more service-oriented rental experience. We also provide an all-round safety package with Avis Inclusive. Germany is in vogue as a holiday destination. Renting a car is, of course, the ideal means of transport for reaching more remote regions easily and conveniently.



**Andreas von Puttkamer**

Head of the Aviation Division  
Flughafen München GmbH

**Flughafen München GmbH** – Munich Airport has successfully run targeted online campaigns in markets with no travel restrictions such as the US, Arabian Gulf, Singapore (vaccinated travel lane) and European source markets. Linking the tourism content of our partners Bayern Tourismus/Tourismus München with our airlines' high-reach channels was particularly successful. The two-day Virtual Travel Fair Asia event hosted by the Jewels of Romantic Europe marketing alliance in collaboration with Aviareps and Lufthansa was certainly a highlight. We expect the anticipated market opening in Asia and return of promotable business travel, especially for Germany as a MICE location, to provide greater growth impetus in 2022.

**Fraport AG** – Our first priority, and not just in pandemic times, is to ensure that our customers have a good and safe journey via Frankfurt Airport. We give passengers specific tips through a variety of online channels. For example, on our website [www.frankfurt-airport.com](http://www.frankfurt-airport.com) we offer a tool that lists the exact travel requirements for your chosen destination at the touch of a button. We support airlines on our social media channels. When markets open up again, we use creative posts to break the news – which the travellers these messages are targeted at really seem to enjoy.



**Anke Giesen**

Member of the Executive Board and Executive Director Retail and Real Estate, Fraport AG

**Flughafen Düsseldorf GmbH** – North Rhine-Westphalia boasts quite an attractive mix – from urban areas with an array of cultural offerings to rural regions such as the Lower Rhine and the Eifel, with their rich variety of outdoor recreational activities and promise of spectacular encounters with nature. Webinars for the foreign travel industry in cooperation with regional partners and destination-specific campaigns with online travel agencies create awareness of our region and position NRW as an attractive travel destination.



**Thomas Schnalke**

Chief Executive Officer Flughafen Düsseldorf GmbH

People have not lost their appetite for travel and we expect traffic to increase from spring 2022 onwards, when more people from Italy, Spain, the UK – and Eastern Europe too in the medium term – will visit the Rhine-Ruhr region again. The approaching 2024 European Football Championship in Germany will also provide a boost for inbound tourism, as Düsseldorf is one of ten venues for the tournament. We are already looking forward to welcoming football fans from all over Europe.

**Sixt SE** – The coronavirus pandemic posed significant challenges to the global and German travel and tourism industry. Sixt saw the crisis as an opportunity and went on the offensive! We have become more international, more digital and have further expanded our range of products and services to meet the needs of our customers. In the digital sphere, people looking to travel are increasingly using channels such as Facebook and Instagram and platforms such as Expedia and Booking. This then gives us an idea of the destinations they are interested in, which we can use to create targeted offerings.



**Regine Sixt**

Senior Executive Vice President Sixt International Marketing, SIXT SE

Trends over the past year indicate one thing clearly: people want to be mobile and want to travel as soon as this is possible. Destination Germany, with its huge potential in the form of sustainable and nature-based tourism, safe travel, political stability and medical infrastructure, also benefited from this. SIXT supports its customers here as a competent premium service provider and inspires them with limitless and flexible mobility.



**Christian Tänzler**

Deputy Chairman ADFC

**German Cyclists' Federation (ADFC)** – Experiences in the great outdoors have become much more important since the onset of the pandemic, with cycling tourism already taking a leading role and holding great potential for the future. In this context, the quality of what is on offer is a key factor in people's decision to travel. By certifying long-distance cycle routes, cycle touring regions and cycle-friendly accommodation, the ADFC is laying the foundations for digital and analogue marketing at national and international level.



**Karina Kaestner**

Vice President of Partner  
Management DB Vertrieb GmbH

**DB Vertrieb GmbH** – International leisure travel by rail recovered exceptionally fast when travel restrictions were lifted in 2021, reaching pre-pandemic levels in just a few months. This enabled rail to become even more important as a sustainable means of transport for German tourism. We achieve optimal customer activation with the latest technologies in programmatic and social media advertising, alongside high-reach inspirational campaigns such as the Feel Good campaign with the GNTB.



**Hertz Autovermietung GmbH** – For Hertz, 2022 is all about modern and sustainable mobility. The year will be shaped by investments in electric vehicles and digitalisation. From global campaigns to promote Europe and Germany as an attractive travel destination to established concepts such as our 24/7 B2B2C solution, Hertz will remain close to customers and their needs in 2022 delivering a premium service, whether digitally or face to face.



**Jan-Peter Ellerbrock**

Managing Director  
Hertz Autovermietung GmbH

**Lufthansa** – Digitalisation and sustainability. These are our key topics for the future. Communication with our customers is becoming increasingly digital, direct and delivered across multiple channels, which makes things more convenient and simplifies workflows the world over. We also want to make flying more sustainable.

Sustainable travel is more important than ever. Our ambition is to be net carbon neutral by 2050. New aircraft currently provide the greatest leverage in this respect, but in the long term it will be sustainable aviation fuels that will make flying more environmentally friendly.



**Dr Stefan Kreuzpaintner**

Chief Commercial Officer Lufthansa  
Airline & Hub Manager MUC, SVP  
Global Sales Lufthansa Group

GNTB annual press conference in Vienna, June 2021





743.06  
993.28

451.91

743.06

411.08

451.91

536.85



GNTB CAMPAIGNS FOR  
DESTINATION GERMANY

# TAKING NEW PATHS

The world in which tourism operates is changing. The core Destination Germany brand is the basis for a high international brand awareness. Global campaigns tell stories that continually revitalise the brand, while sustainable, high-quality offerings inspire customers to travel to Germany.

# FOCUSING ON EVERY ASPECT OF THE CORE BRAND

The COVID-19 pandemic is accelerating technological progress across the tourism industry, while making people think more carefully about the destinations that they want to visit. As a result, having an unmistakable brand profile is becoming increasingly important.

Brand communication is based on the two pillars of the core brand, 'towns, cities & culture' and 'nature & relaxation' with the overarching aspects of sustainability and accessibility. Building on the strong brand awareness among potential visitors around the world, the GNTB's strategy is to clearly present Germany as a safe and multifaceted destination full of sustainable and innovative offerings. It uses a wide range of marketing tools to position Germany as a modern and attractive destination.

In doing so, the GNTB is laying the foundations for the recovery by aiming for qualitative growth in high-potential markets and segments that will be important in the future.



# CITIES & CULTURE

In the second year of the pandemic, Germany once again cemented its position as the no. 1 cultural and city break destination for European travellers.

Even though cultural tourism was severely restricted by the pandemic in the first and last few months of the year, city breaks remained the top reason for European travellers to visit Germany, and are thus the engine for driving the recovery in international tourism. In its travel sentiment survey from September 2021, the European Travel Commission looked into the interest in foreign travel over the subsequent six months: 18 per cent of respondents were interested in city breaks, 12.5 per cent in culture and cultural heritage, 4.3 per cent in multi-destination tours and 3.7 per cent in food and drink.

Interest in travel to Germany is even more pronounced, as IPK International found in its COVID-19 survey commissioned by the GNTB (September 2021). According to its findings, 57 per cent of respondents are planning city breaks in the next twelve months, and that figure is rising.

## Five new UNESCO World Heritage sites in Germany

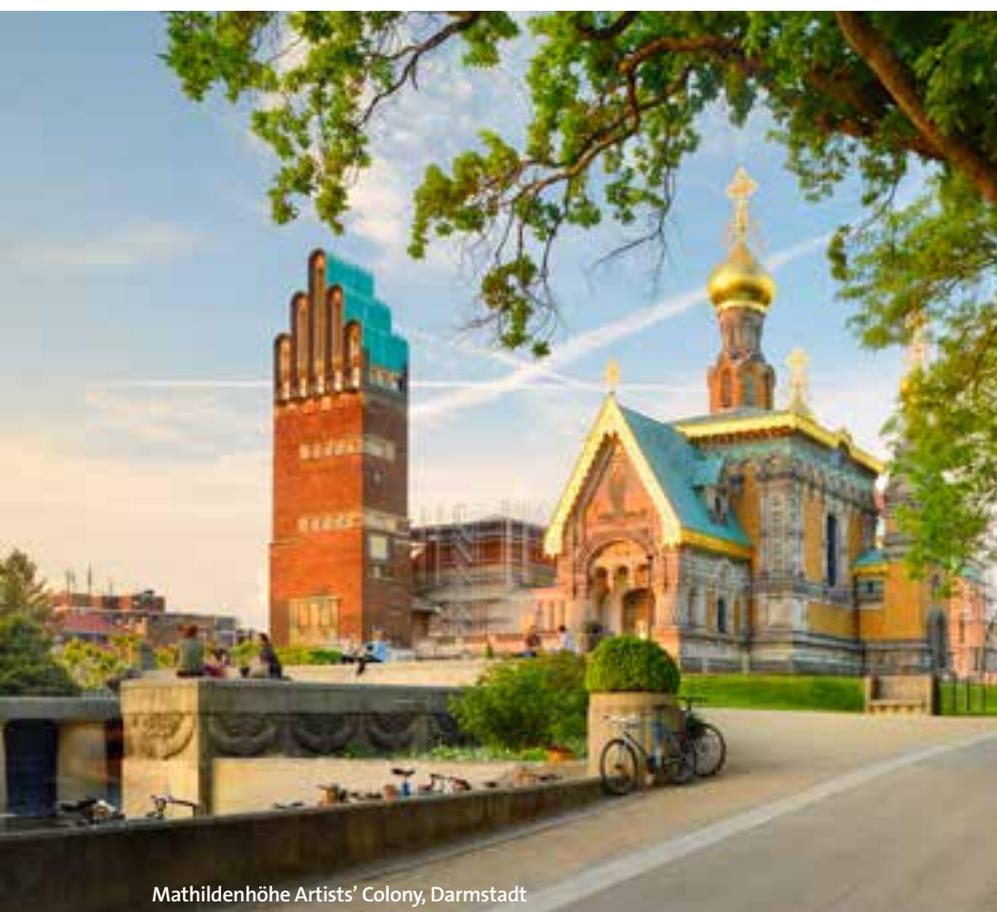
Germany's international reputation as the top cultural travel destination in Europe was given a boost by the UNESCO World Heritage Committee's decision to approve five new German sites in 2021.



**Armin Dellnitz**

CEO of Stuttgart Marketing GmbH and spokesperson for the Executive Board of Magic Cities

*“German cities are in an excellent position for the restart. They are attractive, safe, easily accessible, and offer good value for money, making them highly competitive. This year, the Magic Cities are focusing on the two largest overseas markets, the US and China. We will be targeting US travellers through an extensive content campaign. In China, the emphasis will be on a range of social media channels, such as the Little Red Book platform.”*



Mathildenhöhe Artists' Colony, Darmstadt

## New UNESCO World Heritage sites in Germany in 2021

- Mathildenhöhe Artists' Colony, Darmstadt
- Baden-Baden, Bad Ems and Bad Kissingen as Great Spa Towns of Europe
- SchUM sites Mainz, Worms and Speyer
- The Lower Germanic Limes\*
- The Western Segment of the Danube Limes\*

\* Part of the Frontiers of the Roman Empire



**Claudia Schwarz**

Chairwoman of the German UNESCO World Heritage Sites Association

*“The 51 UNESCO World Heritage sites now put Germany in third place on the World Heritage list. The sites are a major factor in Germany’s position as one of Europe’s top cultural travel destinations. Together with the German National Tourist Board, we are working even harder to promote professional, sustainable tourism at the World Heritage sites.*

*We look forward to welcoming more international visitors to our wonderful World Heritage sites again.”*

UNESCO World Heritage and SchUM site – the New Synagogue in Mainz



### Macro-regional UNESCO campaign in Switzerland and Austria

As part of its long-standing collaboration with the German UNESCO World Heritage Sites Association, the GNTB launched a content marketing campaign in 2021 with editorial features on a range of news and lifestyle portals in Switzerland and Austria. The many facets of World Heritage in Germany were presented in the themes ‘gardens, palaces and parks’, ‘landscape and architecture’, and ‘towns, churches and abbeys’. In response to the changes in travel behaviour brought about by coronavirus, the campaign’s focus was on World Heritage in the context of nature, gardens and landscapes.



Advertisement from the macro-regional UNESCO campaign, Badener Tagblatt, Switzerland

**3.8 million**  
VIEWS

**10,000**  
CLICKS

# NATURE & RELAXATION

The second major pillar of Destination Germany's core brand has been given a boost by the pent-up demand that accumulated during the coronavirus pandemic. In countries bordering Germany, such as the Netherlands, Belgium and Austria, nature holidays and outdoor activities top the list of holiday preferences, according to the ETC survey from October 2021.

Thanks to its sensational scenery, unspoilt nature and wide range of active holiday options, Destination Germany provides many opportunities to respond to the shift in customer expectations. This is confirmed by the findings of IPK International's COVID-19 survey from September 2021. Of the respondents around the world interested in travelling to Germany, over a third are planning a nature-oriented holiday in the next twelve months, 29 per cent a holiday by the water, 10 per cent a wellness holiday and 5 per cent an active holiday (multiple answers permitted).



**Monika Reule**

Managing Director  
of the German Wine Institute (DWI)

*"We believe that the trust placed in Germany as a safe place to visit, the sustainable outdoor experiences on offer in Germany's wine regions, and the draw of regional food and wine can provide a major boost to inbound tourism. What's more, there is growing interest in caravanning and in individual pitches. Picking up on this trend for independent travel, Germany's winegrowers are offering a more attractive and rounded programme of activities."*



The GNTB's Danish office worked with local channel TV 2 Danmark and Thüringer Tourismus GmbH to promote Destination Germany: An episode of '1 døgn, 2 hold, 3 dyr' showcased Germany as a sustainable destination and the perfect place for holidays in nature.

With its global German.Spa.Tradition. campaign (see page 70) and the extended focus of the Feel Good sustainability campaign (see page 72), the GNTB further strengthened the 'nature & relaxation' facet of the core brand in 2021.

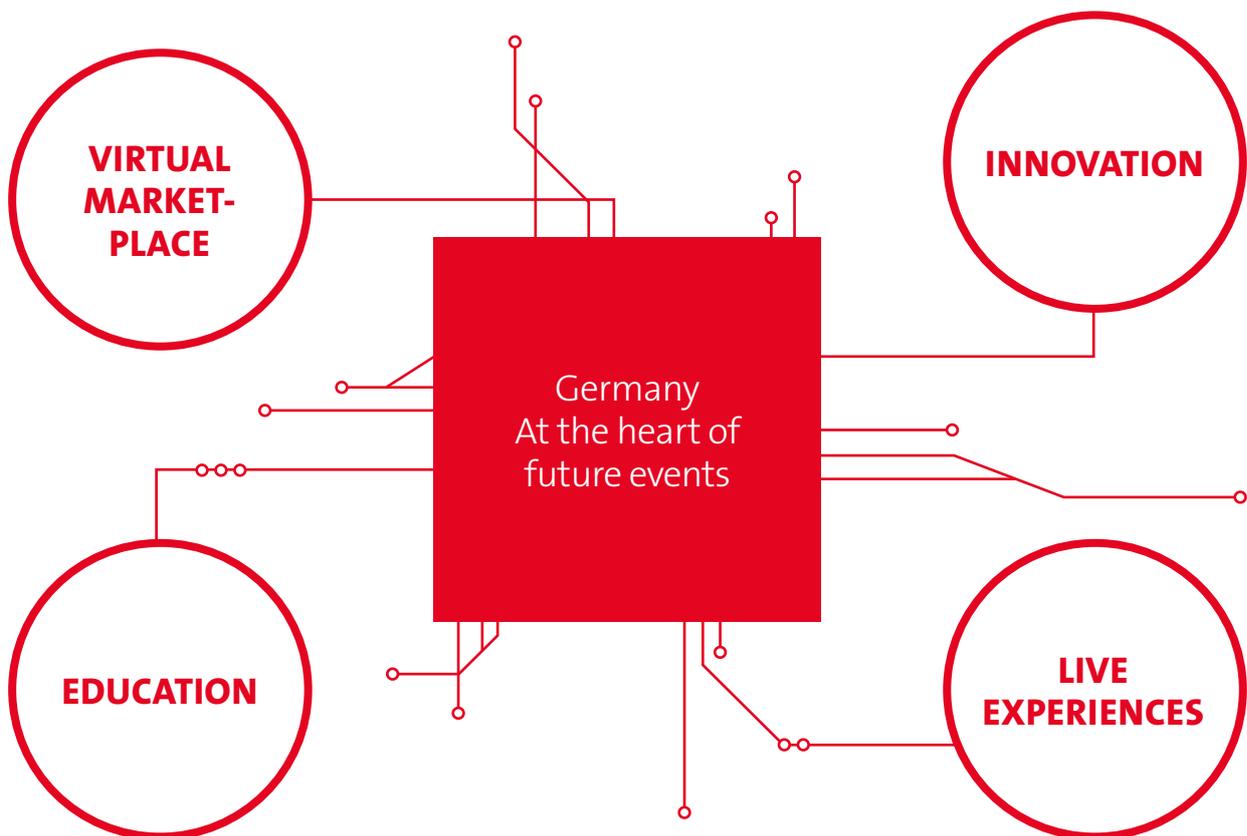
# BUSINESS TRAVEL

Internationally, the business travel market is undergoing a process of transformation that has been accelerated by the COVID-19 pandemic. This presents major challenges for traditional business travel, as well as for the conference, meetings and events market. Prior to the pandemic, almost one quarter of the volume of all inbound travel from Europe to Germany was generated by business travellers – a higher proportion than in any other European country.

With a drop of 34 per cent year on year, the impact on business travel to Germany in 2021 was less severe than on inbound tourism as a whole (IPK World Travel Monitor 1 – 8/2021). This is reflected in Germany's position as by far the leading European destination for business travel. As a result of the extended lockdown in the first half of the year, the fall in traditional business travel of 31 per cent was somewhat lower than for MICE travel (down by 37 per cent).

## GERMANY – AT THE HEART OF FUTURE EVENTS

In 2021, the GNTB participated in the 'Germany – at the heart of future events' campaign, which was initiated by its strategic partner, the German Convention Bureau. The GNTB, municipal and regional convention bureaus, organisers and venues presented Germany as an attractive conference and events location to international contacts and trade partners during the four-month online fair.





Key visual of the #SafeBusinessTrips campaign

## #SAFEBUSINESSTRIPS

The GNTB launched its Safe Business Trips initiative in collaboration with the German Convention Bureau. The aim of the project was to provide partners along the value chain with answers to questions that had become urgent in the face of the coronavirus pandemic.

The initiative saw the GNTB and GCB create the [www.safebusinessstrips.de](http://www.safebusinessstrips.de) website, which features a structured set of information and legal pointers to help with decisions in favour of or against business trips during the pandemic.

All actors along the business-trip value chain were invited to join the initiative and to share their own approaches. Cities, conference organisers, trade fair organisers and other experts used the initiative to share knowledge.

## MEETINGS AND EVENTS BAROMETER

In 2021, the GNTB, the GCB and the European Association of Event Centres (EVC) tasked the European Institute for the Meetings Industry (EITW) with analysing the German events market using the meetings and events barometer (meba).

The key figures for the conferences, meetings and events market in Germany in 2020 confirmed that the world of events is changing due to the pandemic, both qualitatively and quantitatively. In particular, the survey confirmed that digitalisation and internationalisation will be key factors in shaping the future of the events market.

Based on the survey among providers and organisers of physical and of virtual events, the meba predicted that the rapid change in the market in the international context will continue post-coronavirus, but demand for in-person events will at least partially recover. By 2022, in-person events are expected to reach 75 per cent of 2019 levels, while the number of hybrid events will increase by 16 per cent compared to 2019, and the number of virtual events by 10 per cent. Going forward, in-person events are expected to approach pre-pandemic levels, while the proportion of events held virtually is set to drop.



**Matthias Schultze**

Managing Director  
German Convention Bureau (GCB)

*“Meetings, conferences and events remain an essential tool for solving complex issues in a multilayered environment with global challenges. Business events in Germany might be close-knit and on a small scale, or they might involve experts from around the world – but they are always authentic and sustainable. There is huge demand for meeting in person, which is why safety and hygiene protocols are currently right at the top of the agenda. Through the #SafeBusinessTrips digital campaign run in collaboration with the GNTB, the GCB provides a central platform offering extensive and transparent information covering the entire delegate journey. This campaign is part of the GCB’s countercyclical marketing, which aims to lay the foundations today for securing significant market share in the future.”*

# SUSTAINABILITY

The GNTB has consistently championed sustainability internally and externally for over ten years, and is committed to corporate social responsibility and sustainable corporate management. Working closely with its partners in Germany's inbound tourism industry, it has supported the development of sustainable tourism offerings. Internationally, the GNTB communicates these products and the insights gained to the travel industry, the media, influencers and consumers.

**GERMANY RANKED 4<sup>th</sup>**  
in the 2021 SDG Index\*

Germany has an excellent image when it comes to sustainability. For example, the Nation Brands Index (NBI) 2021 named Germany as the nation that is dealing best with climate change.

For **7 YEARS**, Germany has been in the **TOP TEN** countries for attainment of the SDGs\*

This high regard that Germany enjoys in the international market supports its positioning as a sustainable destination. For example, the respondents from 18 source markets in IPK International's COVID-19 study ranked Germany in fifth place.

## SUSTAINABLE TOURISM ...

... makes efficient use of the environmental resources that are a key factor in the development of tourism and contribute to the protection of important ecological processes. It promotes the preservation of our planet's natural heritage and biodiversity, and helps to reduce emissions and the consumption of resources.

... respects authentic expressions of social and cultural identity at the destinations as well as their cultural heritage and traditional values. It furthers intercultural understanding and tolerance, and strives for inclusivity both on the provider side and customer side.

... safeguards long-term business operations that bring socio-economic value to all stakeholders, and ensures that this is shared fairly. It supports regional economic cycles and creates stable employment and income. It is innovative and makes use of the opportunities presented by the digital revolution.

The GNTB's sustainability initiatives in 2021 centred around the expansion of the Feel Good campaign (see page 72).

The GNTB also gave presentations and held discussions at events such as its own German Travel Mart, and

participated in the networking forum of the Sustainable Travel Destinations Excellence Initiative, the Green Tourism Camp 2021, the sustainability workshop run by Realizing Progress, events organised by regional marketing organisations, and ITB Berlin.

The presentation of the Feel Good campaign garnered international publicity.

The GNTB also maintains close contacts with international organisations such as the ETC, UNWTO and WTM, and with sustainable tourism experts.

# ACCESSIBILITY

As an integral element of responsible and sustainable tourism, accessibility is firmly enshrined as an overarching aspect of Destination Germany's core brand. Inclusivity, i.e. the inclusion of all people in travel, is one of the GNTB's strategic areas of action. The aim here is to share knowledge, to bring potential partners together and to promote accessible tourism on the customer and the supplier side by providing information for relevant target groups.

In 2021, the GNTB presented Germany as a destination with a wide variety of barrier-free offerings. It did this nationally, for example at the Schleswig-Holstein tourism conference, and internationally at virtual conferences run by the Adventure Travel Trade Association (ATTA, USA) and Travelability (USA). The GNTB stepped up the sharing of ideas and knowledge with stakeholders from national bodies such as the Tourism for All working group and the Association of Barrier-free Destinations in Germany, and with international organisations such as Access Israel, ENAT and the Zero Foundation.

## Record participation for the virtual Barrier-free Tourism Day in 2021

There were over 530 registrations for Barrier-free Tourism Day, which the GNTB held as a virtual accessible event for the first time on 12 March 2021. This was more than twice as many as for the in-person events in previous years.

The online format featured sign language, captioning and simultaneous interpreters to ensure that people with a wide range of disabilities could follow the programme. Neha Arora, an expert in accessible travel and the founder of Planet Able, an Indian company specialising in travel for older people and people with disabilities, was the keynote speaker.

## New 'Barrier-free travel' section on [www.germany.travel](http://www.germany.travel)

The 'Barrier-free travel' section on [www.germany.travel](http://www.germany.travel) was completely revamped in 2021 and significantly expanded in terms of content. The integrated database contains all the survey results of the Travel for All national certification system in German and English.



St Wendel, woman with a cochlear implant on a guided audio tour

## International strategies for the future and examples of best practice at the tenth Barrier-free Tourism Day in 2022

The event was opened by Claudia Müller, Federal Government Coordinator for the Maritime Industry and for Tourism, and Jürgen Dusel, Federal Government Commissioner for Matters relating to Persons with Disabilities.

Helena Dalli, the European Commissioner for Equality, presented a new EU strategy, 'Union of Equality: Strategy for the Rights of Persons with Disabilities 2021–2030'. Leading speakers from the US and the UK presented international examples of best practice in the area of inclusivity.

# GLOBAL CAMPAIGNS IN 2021



*German.  
Local.  
Culture.*  
#YoursTrulyGermany

## Four cluster themes for navigating the range of tourism offerings

The ‘flair’ theme focuses on different styles of architecture from medieval to modern, the local ambience in Germany’s towns and cities, and contemporary cultural events. The ‘craft’ theme highlights the rich variety of Germany’s centuries-old customs and traditions. ‘Taste’ invites visitors to get a flavour for local and regional food and drink, including wines from Germany’s 13 vineyard regions and beers from more than 1,500 breweries. The ‘green’ theme centres on sustainable holidays in towns and cities, and how to combine city breaks with nature-based experiences in the surrounding countryside.

Marketing collaborations provided the following partners with further opportunities to present themselves in the attractive environment of the campaign:

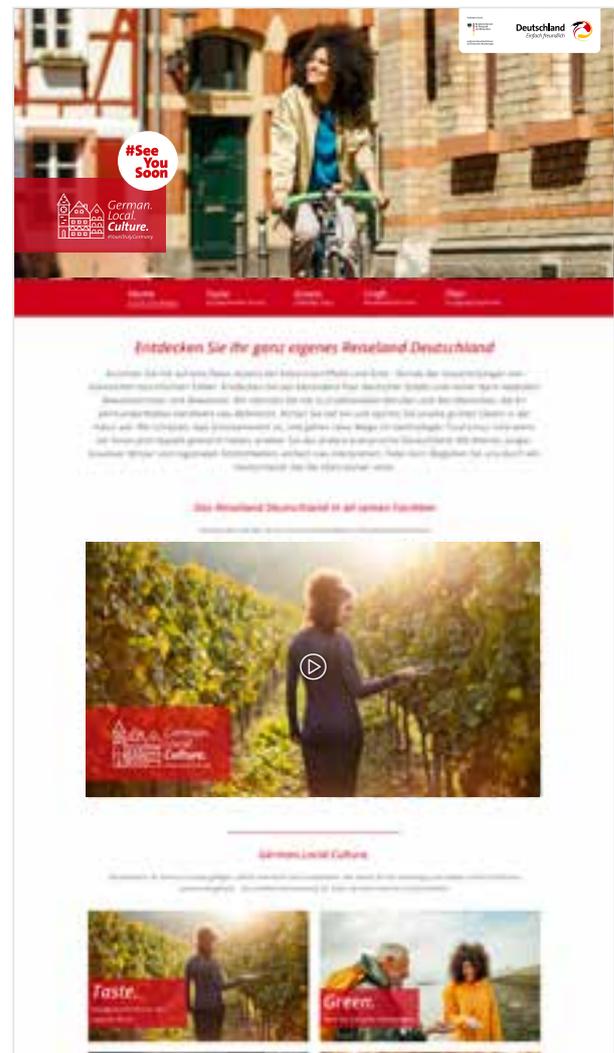
- WFB Wirtschaftsförderung Bremen GmbH
- Deutsches Weininstitut GmbH
- Romantischer Rhein Tourismus GmbH
- IMG Investitions- und Marketinggesellschaft Sachsen-Anhalt mbH
- Stuttgart-Marketing GmbH

German.Local.Culture. was run on a ‘social first’ principle in all markets covered by the GNTB worldwide using programmatic advertising, SEO, social media, influencer marketing and online travel companies, with the microsite serving as the central hub for inspiration and information.

## GERMAN.LOCAL.CULTURE.

The GNTB’s German.Local.Culture. campaign in 2021 was a cross-media endeavour highlighting exciting facets of German towns and cities, such as artisan crafts and local producers, food and drink, culture and architecture, and the countryside and nature on the cities’ doorstep. The campaign served to underline Germany’s leading position as a destination for city breaks and cultural travel in Europe. The GNTB also added new dimensions to address the growing desire among travellers for authenticity and traditions, and to give an insight into Germany’s vibrant customs – from artisan crafts to local and regional food specialities.

The integration of rural areas and regions presents an opportunity to link the new desire for unspoilt nature with urban experiences, and should encourage people to extend the length of their stay during city breaks.





Pop-up event in Warsaw, September 2021

Instagram **104 MILLION IMPRESSIONS**  
 Facebook **71 MILLION IMPRESSIONS**  
 YouTube **52 MILLION IMPRESSIONS**  
 Weibo **17 MILLION PAGE VIEWS**  
 WeChat **630,000 AD IMPRESSIONS**



Pop-up event at Allianz Cinema in Zurich, August 2021

**NEW**

TikTok **19 MILLION IMPRESSIONS**  
 Pinterest **13 MILLION IMPRESSIONS**

Digital content shown in **27** MARKETS



Pop-up event in the museum quarter in Vienna, September 2021

**775,000 VIEWS** on the microsite  
**34 MILLION IMPRESSIONS** via  
 programmatic marketing  
**530,000 EMAIL CONTACTS**

**6 GROUP PRESS TOURS**  
**20 INDIVIDUAL PRESS TOURS**  
**59 ARTICLES** with a  
**TOTAL REACH** of **550 MILLION**



Photography exhibition as part of the German.Spa.Tradition. campaign in Moscow, July 2021



**Brigitte Goertz-Meissner**

President of the German Spa Association

*“Germany is home to more than 350 spas and health resorts, which are renowned for providing medical and therapeutic services of the highest standard. As innovative centres of excellence for preventive healthcare and rehabilitation, they are also a valuable asset for Germany’s inbound tourism industry. Through its German.Spa.Tradition. campaign, the GNTB has done a fantastic job of promoting our outstanding health and wellness amenities, local remedies and traditional spa culture to an international audience.”*

# German. Spa.Tradition.

## GERMAN.SPA.TRADITION.

The coronavirus pandemic has changed the preferences and expectations of travellers the world over. Interest in health and wellness is on the up, nature and leisure are more important than ever, and outdoor activities and sustainable holidays are growing in popularity. The GNTB’s German.Spa.Tradition. campaign picked up on this and presented Germany as a destination for high-quality health and wellness experiences and with a long tradition of spas. It shone a light on the range of experiences on offer, subject to the coronavirus rules in place at the time.

Germany’s 350 quality-approved spas and health resorts were at the centre of the campaign. They support prevention and rehabilitation on the basis of Germany’s long-standing spa tradition and excellent standards of medical care. Additional aspects highlighted by German.Spa.Tradition. included the options for enjoying healthy food and exercise in unspoilt nature, and the unique ambience of the spa towns with their historical architecture, parks and cultural attractions.

The campaign also commemorated the 200th anniversary of the birth of Sebastian Kneipp, whose holistic health philosophy continues to benefit people to this day through various medicinal, therapeutic and wellness offerings.

German.Spa.Tradition. was a targeted content campaign with a focus on engaging at an emotional level and was run in ten European markets and the Arab Gulf States. The microsite served as an information hub featuring a campaign video and fascinating insights into Germany’s spa traditions. Storytelling with the three cam-



ampaign ambassadors was the main campaign tool. The GNTB also used high-reach content marketing, social media, themed newsletters and high-quality advertorials in international source markets.

Programmatic marketing  
**39 MILLION IMPRESSIONS**  
**243,000 VIEWS** on the microsite  
**263,000 EMAIL CONTACTS**

### Five cluster themes as content pillars at the heart of the campaign:

**BREATHE** Germany's varied landscapes as the ideal space for outdoor activities such as hiking, yoga, lakeside walks and meditative forest bathing

**RENEW** Natural medicinal resources, such as mineral springs, thermal springs, peat and mud, as the basis for a diverse range of health and wellness treatments

**ENJOY** Traditional spa resorts offering elegant architecture and parks as well as events and exhibitions

**FEEL** Natural treatments that boost energy levels and wellbeing, such as Kneipp cures, thalassotherapy and mud wraps

**TASTE** Enjoying food and drink and a healthy diet with medicinal herbs and plants, and avoiding processed food

### Campaign ambassadors bring the themes to life

German.Spa.Tradition. thrives on the commitment of people who promote a healthy lifestyle, mindfulness, getting to know your own body and achieving a balance between wellbeing and culture. Their testimonials in the form of personal stories, offerings and ideas supported the delivery of the campaign.

- Abbess Laetitia Fech, Waldsassen Abbey
- Forester and bestselling author Peter Wohlleben, Wershofen, Eifel
- Marketing and events expert Silke Schauer, Bad Pyrmont

Facebook  
**66 MILLION IMPRESSIONS**

Instagram  
**60 MILLION IMPRESSIONS**

YouTube  
**25 MILLION IMPRESSIONS**

Pinterest  
**12.3 MILLION IMPRESSIONS**

### Partners are supporting the campaign's implementation

Marketing collaborations provided partners in Germany's inbound tourism industry with further opportunities to present themselves in the attractive environment of the campaign.

- Bad Zwischenahn
- Baden-Baden
- Wiesbaden

**2 GROUP PRESS TOURS**  
**6 INDIVIDUAL PRESS TOURS**  
**52 MILLION CONTACTS**

## FEEL GOOD

The coronavirus pandemic has made travellers around the world even more concerned about sustainability. Unspoilt nature, careful use of resources and a focus on wellbeing are gaining in importance. The GNTB picked up on this trend and expanded the scope of its Feel Good campaign in 2021 following its successful launch in 2020. Through its campaign, the GNTB is helping to raise awareness of Germany's transformation into a sustainable destination, while highlighting the strength of the Destination Germany brand.

# FEEL GOOD

## Sustainable travel in Germany



Through the Feel Good campaign, the GNTB was able to communicate positive examples of sustainability to consumers internationally, as well as to the travel industry, journalists and influencers as part of its wider sustainability strategy. In addition to the image-based content, the Feel Good campaign showcased specific travel experiences involving sustainable products and services.

There were four clusters for navigating the range of tourism offerings: 'Active Outdoors', 'Education and Experiences', 'Responsible Enjoyment' and 'Sustainable Experiences in Towns and Cities'. Tips on sustainable travel supplemented the information on offer, while a multilingual carbon calculator enabled travellers to document their trip's emissions and offset them through their local schemes.

The 2021 Feel Good campaign was run in the neighbouring countries of Austria, Belgium, Denmark, France, the Netherlands, Poland and Switzerland, in the key European source markets of Italy, Spain, Sweden and the UK, and in the key overseas markets of China, Japan and the US.

Facebook and Instagram reach of **15.5 MILLION**  
In total **83.3 MILLION IMPRESSIONS**

Advertising in international social media, including Facebook News Feed, Instagram Feed and Instagram Explore Feed, in stories on Facebook and Instagram, and through programmatic advertising, took customers to a microsite featuring a selection of cities, regions and hotels. A new video was also incorporated into the campaign, which shows interviews with people who have launched or are running exemplary sustainability projects.

◀ GNTB Austria: influencer campaign with TikToker



Feel Good press event in Madrid, June 2021



OOH campaign at Malmö train station, Sweden

YouTube **22 MILLION IMPRESSIONS**  
 Sina Weibo and WeChat  
**34 MILLION CONTACTS**  
**25 MILLION IMPRESSIONS** via  
 programmatic advertising



GNTB Feel Good press tour in Bremen

The Feel Good campaign received the Destination of Sustainable Cultural Tourism Award 2021 from the European Cultural Tourism Network (ECTN) and was also awarded the World Responsible Tourism Award 2021 at the World Travel Market.

**Campaign partner Deutsche Bahn – fully committed to sustainability**

Deutsche Bahn was heavily involved in delivering the Feel Good campaign as a Premium Partner. Germany's national rail provider undertakes various measures to protect the climate, nature and resources, reduce noise pollution, and achieve its sustainability goals, and is therefore an ideal partner for the GNTB's sustainability work.

## CHRISTMAS 2021

The GNTB's Christmas 2021 campaign highlighted typical customs and traditions in the various regions of Germany, with the aim of providing extra impetus for city breaks and cultural tourism in the run-up to the festive season.

At the heart of the 'Christmas sparkle' campaign was a landing page in four languages, which provided inspiration for

**14 NEWSLETTERS** (B2C, B2B, press) to **80,000 RECIPIENTS**  
Click rate 9.2 per cent  
Open rate 32 per cent

The campaign was launched on 5 November in eleven international markets via social media, programmatic advertising, search engines and newsletters. It was aimed at Germany's neighbours Austria, Belgium, the Czech Republic, Denmark, France, the Netherlands, Poland and Switzerland, plus Italy and the UK, and the overseas market in the US. The campaign was not able to run for its full duration due to the pandemic.

# Season's Greetings from Germany

travellers and featured prominent Christmas markets in the 16 federal states. The platform also provided potential visitors with information on activities in the run-up to the festive season as well as Christmas events and winter offers. There were eleven partner collaborations within the scope of the campaign.

**219,000 VISITORS** on the landing page with **240,000 VIEWS**

Programmatic advertising – **9.4 MILLION IMPRESSIONS**

**82 MILLION SOCIAL MEDIA IMPRESSIONS**

## PAN-EUROPEAN 'OPEN UP TO EUROPE' CAMPAIGN PROMOTES SUMMER TRAVEL

The European Travel Commission (ETC) launched a digital campaign under the banner 'Open up to Europe' to provide people in European countries with the latest travel information and inspire them to travel. The GNTB collaborated on the project, which is co-funded by the EU, with 30 partners that included countries, regions, transport providers, hotel operators and online travel companies.

At the heart of the campaign is the website [www.openuptoeurope.eu](http://www.openuptoeurope.eu), which pools the latest travel information from the various European countries. It links directly to the landing pages of all the partners. The responsive web design with lightboxes enabled partners to target their content at selected markets.

The GNTB used the campaign to strategically position content about Germany as a travel destination in markets that promised great potential for recovery for inbound tourism in summer 2021. Special lightboxes with sequences from the German.Local. Culture. and German.Spa.Tradition. campaigns and the Feel Good sustainability campaign were shown to internet users from Austria, the Czech Republic, France, the Netherlands, Poland and Switzerland.

# A LOOK AHEAD TO 2022's INTERNATIONAL CAMPAIGNS

The GNTB's campaigns for 2022 draw on the strong positioning of Germany's brand values, while also incorporating the latest trends of cultural tourism, nature and sustainability to provide targeted impetus for driving customer demand during the recovery phase. This will provide a further boost to the sustainable and digital transformation of travel.



*German.  
Local.  
Culture.*  
#FindYourCityBreak

## GERMAN.LOCAL.CULTURE.

In 2022, the GNTB is building on its successful German.Local.Culture. campaign from 2021, which highlights the diversity of German towns and cities with their customs and crafts, local producers, cultural attractions and exceptional architecture, as well as the tranquility of nature in the rural surroundings.

The focus of the GNTB's campaign is to generate interest in authentic experiences and lesser-known customs and traditions in these towns and cities, and to present them as attractive travel destinations.

# Embrace German Nature



## EMBRACE GERMAN NATURE

The GNTB's new campaign focuses on Germany's stunning natural landscapes and aims to inspire travellers who love nature and outdoor activities to discover these varied attractions for themselves. Care is being taken to avoid overtourism in particularly sensitive regions and to invigorate those regions where more intensive measures are needed in the post-pandemic phase.

A lavishly produced promotional video and creative content are the key elements of the campaign and are brought together on a microsite. The GNTB is using a new digital tool for the campaign. The videos will feature 8D audio for the first time, which allows sound effects to be simulated from eight different directions. With the help of eight campaign ambassadors, the GNTB aims to inspire visitors to discover the beauty and diversity of Germany's natural landscapes. The campaign will follow a 'social-first' approach.

## FEEL GOOD IN 2022

After the success of the Feel Good sustainability campaign in 2021, the GNTB will continue to promote Germany's sustainable tourism offerings in 2022.

Feel Good communicates good examples of sustainable travel experiences and services to potential travellers to Germany around the world.

Key campaign objectives are to promote environmentally friendly travel, to raise the profile of sustainable offerings, and to provide extra impetus to rural areas and green cities.



# FEEL GOOD

# Where do you see the greatest challenges and opportunities for the recovery of Germany's inbound tourism industry from the coronavirus crisis?

**Baden-Württemberg** – The last two years have highlighted how difficult it is to make predictions in a pandemic. That said, there is optimism that Europe will enter the much-anticipated endemic phase in 2022. This would allow a gradual return to normality for the tourism industry. After all, there is huge pent-up demand to be met, both nationally and internationally. People all over the world want to travel. With the support of the GNTB, we have been able to maintain contact with our source markets and have continued to provide travel inspiration.



**Andreas Braun**, Managing Director of Tourismus Marketing GmbH Baden-Württemberg



**Barbara Radomski**, Managing Director of Bayern Tourismus Marketing GmbH

**Bavaria** – Over the past two years, regionality, authenticity and low-impact tourism have increasingly come under the spotlight – a positive shift that gives us cause for optimism in 2022 and beyond. The beautiful natural scenery, the local customs and the traditional way of life are key incentives for travel to Bavaria, and are sure to see the return of large numbers of domestic and international visitors this year. To ensure our future success, it is important that we manage these factors in the long term, so that we can preserve the charm and character of our holiday region, which is loved by visitors from all over the world.

**Berlin** – So far, the Berlin brand has survived the coronavirus crisis unscathed. That was apparent when we reopened in the summer. People will come to Berlin again as soon as they are able to. I also expect a surge in demand in the B2B sector as a result of pent-up demand, despite the digital alternatives. With the Berlin Congress Fund, we have an effective economic stimulus package for bringing events back to the city. However, the shortage of skilled workers in our industry is a concern. Many have left hospitality to take jobs that are thought to be less at risk from the crisis.



**Burkhard Kieker**, Managing Director of visitBerlin



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

**Brandenburg** – We hope that the number of international arrivals will soon return to pre-pandemic levels. The international community in Berlin and visitors from the nearby markets of Poland and the Czech Republic offer great potential for recovery. We also see opportunities for growth from the Swiss, Austrian and Scandinavian markets.

Holidays in nature are of particular interest to foreign visitors, and Brandenburg is ideal for this type of trip. So it is vital that we quickly find long-term solutions for the shortage of skilled workers, which has only been made worse by the pandemic.

**Bremen** – Moving forward, we will be faced with conflicting trends in Bremen and Bremerhaven. On the one hand, there will be a growing need for travel, events and shared experiences. But on the other, travellers still want to feel like they are safe. Space and distancing will certainly be important, with people wanting to connect with nature, for example on motorhome or cycling holidays. The tourism industry will also be focusing heavily on sustainability.

We are seeing a further conflict between the desire for direct interaction with people and face-to-face enquiries and the simultaneous quest for technological solutions such as digital visitor flow systems. Being authentic as a destination and conveying the friendly feel, the buzz and the distinctive character of our region continues to be paramount for us.



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



**Michael Otremba**, Managing Director  
of Hamburg Tourismus GmbH

**Hamburg** – The appetite for travel is immense! The yearning for authentic experiences and interacting with people again will motivate many to travel. However, the shortage of workers, particularly skilled workers, is a critical issue for the hospitality sector, and has been made much worse by the pandemic. It is certainly a complex problem that calls for new solutions. We need to look at factors such as working time models, pay structures, leadership and affordable places for employees to live.

**Hessen** – When making plans to travel to Hessen, people expect a degree of certainty and reliability. To ensure that our visitors enjoy a carefree stay, it is important for us to continually monitor changing patterns in demand and adapt our services accordingly. Hessen is well regarded among travellers for safety, but also for sustainability and regionality, as it offers an attractive combination of urban and rural travel experiences. We are proactively and creatively shaping the future with our digitalisation projects. Targeted coaching is honing the skills of the region's hospitality sector and building on its expertise for the time when international visitors return in large numbers to Hessen.



**Herbert Lang**, Head of Tourism,  
HA Hessen Agentur GmbH



**Tobias Woitendorf**, Managing Director of Tourismusverband Mecklenburg-Vorpommern

**Mecklenburg-Western Pomerania** – The challenges for Mecklenburg-Western Pomerania continue to be its lack of connections to major hubs and the fact that it is relatively unknown internationally. The more intensively we network with international source markets and the more focused we are in our marketing activities, the better incoming tourism will recover. We are looking forward to the new flight connection between Bern and Heringsdorf and the recommencement of the UrlaubsExpress night-train service, which brings holidaymakers from Basel in Switzerland to the seaside resort of Binz. Safety is an aspect that could give us a competitive advantage. The new Safer in MV quality seal is now carried by over 1,000 providers, and gives holidaymakers confidence that effective measures are in place to protect them and to contain the pandemic.

**Lower Saxony** – The source markets for Lower Saxony are all nearby markets, in which there is a great desire for travel. We have products and services that have been highly sought-after while the pandemic has been ongoing: unspoilt natural landscapes and picturesque towns and villages that are not too busy and that capture the spirit of the German.Local.Culture. campaign. Our digital-forward Niedersachsen Hub will also provide us with opportunities. In future, we will be in a position to provide international visitors with foreign-language information even more quickly. This is important because the biggest challenge is the ability to be flexible when market conditions are changing at such a pace: we have to be in a position to focus our communications on other markets at short notice. Our most important task in the long term is to continue to inspire confidence in the quality and safety of tourism in Lower Saxony.



**Meike Zumbrock**, Managing Director of Tourismus Marketing Niedersachsen GmbH



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

**North Rhine-Westphalia** – Flexibility and agility will be essential when implementing marketing measures, particularly for our international markets. Only then can we adapt to the ever-changing coronavirus situation, the current restrictions and, above all, the shifts in the mentality of our visitors. We are being transparent in our communications, and providing travel inspiration to keep North Rhine-Westphalia in the minds of our visitors. We will frequently need to promote special events and to convey the readiness of our tourism providers and regions to ensure safe and memorable experiences under current and future conditions.

**Rhineland-Palatinate** – We are starting the new year with optimism, and hope that 2022 will be a year that will soon bring stability to the tourism industry in Germany and our source markets in Europe. Over the past two years, there has been a growing affinity for online services among potential visitors – this is a great opportunity for us but also a challenge. It is important that we now expand our digital knowledge base and continue to make our content and the offerings that are bookable online widely available in different languages. This is the only way that we can convert the existing interest into firm bookings.



**Stefan Zindler**, Managing Director of Rheinland-Pfalz Tourismus GmbH



**Birgit Grauvogel**, Managing Director of Tourismus Zentrale Saarland GmbH

**Saarland** – In addition to not being able to plan properly, the current trend in the labour market is one of the biggest challenges facing Germany’s tourism industry at present. The severe shortage of skilled workers in hotels and restaurants is destabilising the sector from one coronavirus wave to the next. The growing appeal of regional tourism presents an opportunity for us. Visitors can enjoy a safe, relaxing and enjoyable holiday, while also benefiting from short journey times and direct personal communication with dependable providers.

**Saxony** – Every crisis creates opportunities. But, a key question is: how do we manage to engage the hearts and minds of our visitors when travel requirements around the world are constantly changing and the pandemic is weighing heavily on global tourism infrastructure? Agility and flexibility are required now more than ever. What appears to be a challenge on the one hand can offer scope for innovation on the other. We see the development of new, digital formats as a great opportunity to reach our global customers in a way that is flexible and crisis-proof.



**Veronika Hiebl**, Managing Director of Tourismus Marketing Gesellschaft Sachsen mbH



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

**Saxony-Anhalt** – As the marketing organisation for tourism in Saxony-Anhalt, we primarily see new opportunities. During the pandemic, we have been working to keep our ‘Echt schön. Sachsen-Anhalt’ (Truly beautiful. Saxony-Anhalt) campaign in the minds of potential travellers and to promote our state as a safe travel destination. We have made great progress in the area of digitalisation, and launched the SAiNT database in collaboration with our regional partners. SAiNT stores licensed and structured data on our travel destinations and provide an excellent means for people to find out about everything that is on offer here.

**Schleswig-Holstein** – The shortage of workers poses a major challenge for the tourism industry. People are leaving hospitality for better earning opportunities and more family-friendly working hours in other sectors. But if we want to attract visitors from all over the world in future with attractive offerings and excellent service, we need to take better care of our workforce. Initiatives in Schleswig-Holstein, such as ‘The North Sea Collective’ and ‘100PRO – the training initiative for the event industry’ are leading the way.



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



**Dr Franz Hofmann**, Managing Director of Thüringer Tourismus GmbH

**Thuringia** – To restore confidence in the hospitality sector and encourage people to travel freely, the various pandemic-related restrictions, even within Germany, must soon come to an end. The progress with the vaccination roll-out and the milder virus variants that we are currently seeing are likely to herald a new phase of the pandemic. On this basis, we anticipate a good year for tourism in 2022, in which coronavirus measures must be handled responsibly and effectively, while also allowing for a return to pre-pandemic times.



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SOURCE MARKETS:  
ANALYSIS AND OUTLOOK

# TARGETED PROMOTIONAL WORK

The GNTB plans its activities in the source markets in a strategic and targeted way based on extensive market analysis and close contact to local tourism actors. Market-specific customer requirements are taken into account, as is the level of technology in each market.

# THE GNTB'S MARKETING REACH

Thanks to this strong local presence, the GNTB was able to maintain its active dialogue with the international travel industry despite the travel restrictions. More than 100 market-specific and macro-regional campaigns helped to target potential travellers to Germany.



# 18 OFFICES IN EUROPE

**Amsterdam**

Belgrade

**Brussels**

Budapest

**Copenhagen**

Helsinki

Ljubljana

**London**

**Madrid**

**Milan**

Moscow

Oslo

**Paris**

Prague

Stockholm

Warsaw

**Vienna**

**Zurich**

# 9 OFFICES OVERSEAS

**Beijing**

Dubai

Hong Kong

Los Angeles

New Delhi

**New York**

Tel Aviv/Jaffa

**Tokyo**

Toronto

(as at February 2022)

■ Foreign representative office (in bold text)

● Sales and marketing agency

# REGIONAL MANAGEMENT NORTH WEST EUROPE

## NETHERLANDS • UK/IRELAND • BELGIUM/LUXEMBOURG

In the second year of the pandemic, north-west Europe remained the biggest source region for Germany’s inbound tourism industry, generating around a quarter of all overnight stays by international visitors in Germany in 2021. During the pandemic, independent travellers from the Netherlands and Belgium took advantage of making the short trip across the border in their own car.



### Netherlands/Belgium **MACRO-REGIONAL CAMPAIGN** **#DUITSLANDDICHTBIJ**

- Recovery campaign ‘Sehnsucht – Zin in de Zomer’ (appetite for summer)
- Campaign period: May 2021
- Focus on Germany’s multifaceted appeal and proximity
- Elements: GNTB social media and newsletter, print, online, radio and out-of-home advertising

**TOTAL REACH**  
of more than

**50 million** CONTACTS

## TRAVEL INTENTIONS IN EUROPE FROM JANUARY TO JUNE 2022

Netherlands

**48%**

United Kingdom

**31%**

Belgium

**55%**

Source: European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel, wave 10, 1/2022: Intention to travel to another European country in the next six months. Selected European source markets.



United Kingdom

### INNOVATIVE DIGITAL CAMPAIGN WITH TRAVELZOO

- Video for the German.Local.Culture. campaign
- Interactive video stories that give the user control of their destination experience
- Voice-over by German comedian Henning Wehn, who is well known in the UK

ONLINE REACH

**46,000**  
VIEWS

## OTHER EXAMPLES OF MARKET-SPECIFIC CAMPAIGNS IN NORTH WEST EUROPE IN 2021/2022

Netherlands: **Collaboration with outdoor retailer Bever on the #Wanderlust campaign**

Belgium: **Bike-packing tour along the Elbe Cycle Route**

**OTC collaboration with TripAdvisor on the German.Spa.Tradition. campaign**

UK: **'Germany's Winter Wonderland' OTA campaign in 2021/22**

# REGIONAL MANAGEMENT NORTH EAST EUROPE

**POLAND • DENMARK • RUSSIA • SWEDEN •  
FINLAND • NORWAY**

Travellers from neighbouring Poland and Denmark, in particular, took advantage of the easing of coronavirus restrictions in Germany during the summer months to make up for holidays postponed in 2020. Demand in Poland, which has seen strong growth in recent years, continued to outstrip demand from the wider European market in the second year of the pandemic.

**UDFORSK TYSKLAND I BIL**  
FLYV FRA 349,-

10% RABAT HOS HERTZ OG TJEN OP TIL 5000 EUROBONUS-POINT

BOOK SENEST 13/9

**SAS**

Denmark, Sweden, Norway  
**MACRO-REGIONAL  
SAS FLY AND DRIVE  
CAMPAIGN**

- Collaboration with Scandinavian Airlines (SAS), Hertz, Deutsche Hospitality and the Mercedes-Benz Museum
- Elements: social media, email marketing, newsletter features and landing page
- 23,000 clicks on the landing page and 2.4 million emails

**18 million**  
CONTACTS

## OTHER EXAMPLES OF MARKET-SPECIFIC CAMPAIGNS IN NORTH EAST EUROPE IN 2021/2022

Norway: **Influencer trip in electric cars to nine towns and cities in Lower Saxony to coincide with the Feel Good campaign**

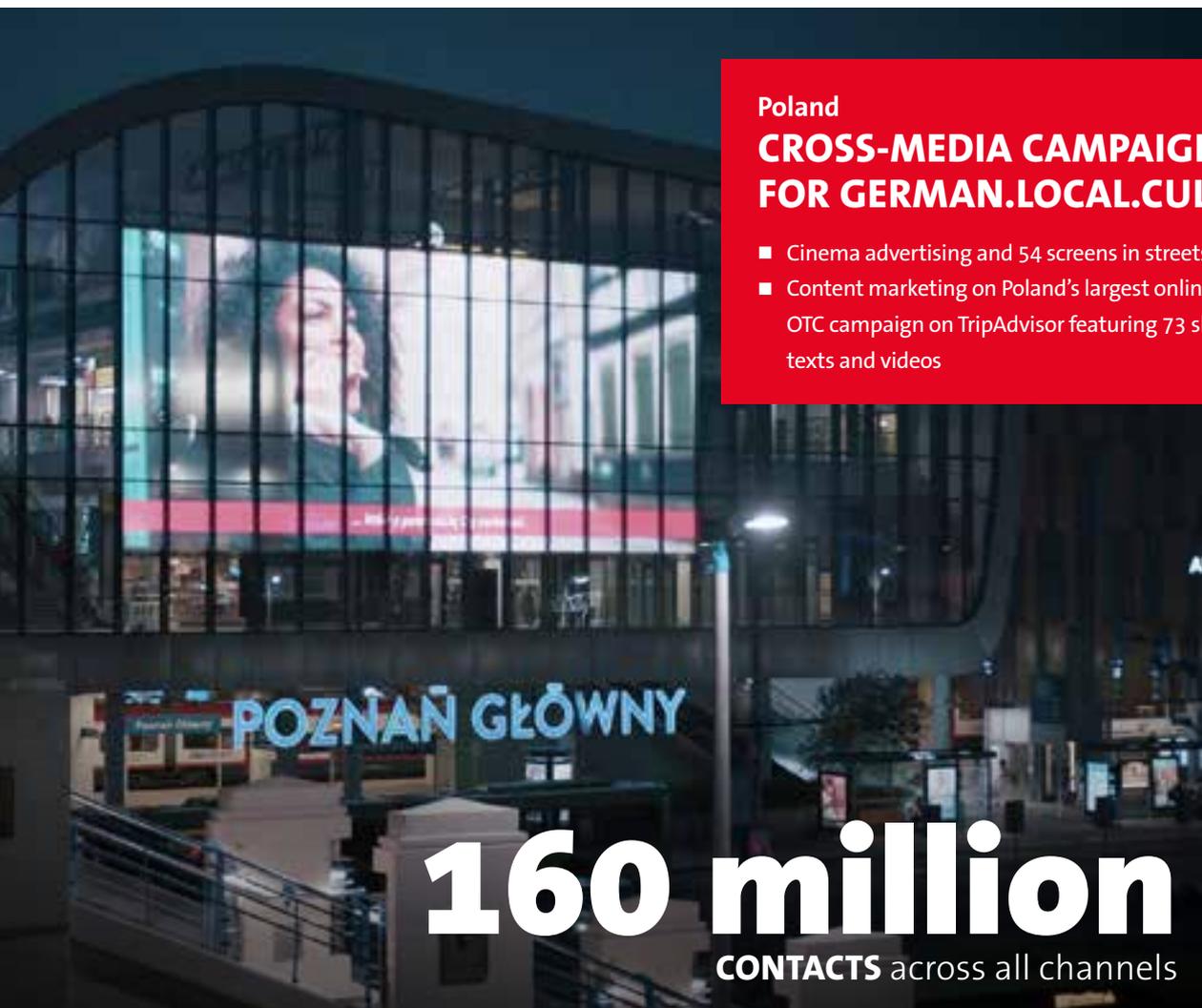
Russia: **Photographic exhibition on German.Spa.Tradition. in Sokolniki attracts over 10,000 visitors**

Denmark: **Cross-media 'Ein Smuttur' campaign**

Poland: **'Cross-border tourism and new federal states' digital campaign**

Sweden: **Cross-media rail campaign generates 5.63 million contacts**

**Palaces and castles OTC campaign**



Poland  
**CROSS-MEDIA CAMPAIGN FOR GERMAN.LOCAL.CULTURE.**

- Cinema advertising and 54 screens in streets and at bus stops
- Content marketing on Poland's largest online portal: OTC campaign on TripAdvisor featuring 73 short themed texts and videos

**160 million**  
CONTACTS across all channels

TRAVEL INTENTIONS IN EUROPE FROM JAN TO JUNE 2022

Poland  
**48%**

Source: European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel, wave 10, 1/2022: Intention to travel to another European country in the next six months. Selected European markets.

# REGIONAL MANAGEMENT SOUTH WEST EUROPE

## SWITZERLAND • FRANCE • ITALY • SPAIN

The source markets Italy, France and Spain enjoyed a particularly strong recovery during the summer months and stabilised their position among Germany’s top European markets. Switzerland, meanwhile, retained its place as the second largest inbound tourism source market. The GNTB promoted Destination Germany across the four countries through digital and macro-regional activities.

### Switzerland

#### SWITZERLAND, BUT IN GERMANY

There are around 100 regions in Germany with Schweiz (Switzerland) in their name. With this connection to Switzerland in mind, the GNTB developed an eye-catching campaign aimed at raising awareness of Germany’s ‘Switzerlands’ and promoting them as attractive travel destinations.

- Reach: 560,416
- 138,714 post engagements



# 2.8 million

**IMPRESSIONS** on Facebook & Instagram  
(stories, feeds and image-text advertisements)

## OTHER EXAMPLES OF MARKET-SPECIFIC CAMPAIGNS IN SOUTH-WEST EUROPE IN 2021/2022

Switzerland: **Rheinalp campaign**

France: **Collaboration SNCF & Thalys and German Week**

**VW campaign (influencer highlight)**

Italy: **Digital cooperation campaign with Dove – Corriere Viaggi**

France, Spain, Italy, Switzerland

## FOURTH SERIES OF GERMANY OFF THE BEATEN TRACK IN COOPERATION WITH DEUTSCHE BAHN

Selected travel bloggers explored Germany by train and reported live on their impressions of 'Germany off the beaten track' using the hashtag #EnjoyHiddenGermany. The focus was on lesser-known rural areas in southern Germany.

- 64 posts on GNTB channels – 332 posts on the influencer's channels
- 7.5 million views

# 22.7 million

IMPRESSIONS

# ALEMANIA

## INSÓLITA 4

#EnjoyHiddenGermany

## EN TREN

### TRAVEL INTENTIONS IN EUROPE FROM JANUARY TO JUNE 2022

Switzerland

# 44%

France

# 43%

Italy

# 40%

Spain

# 46%

Source: European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel, wave 10, 1/2022: Intention to travel to another European country in the next six months. Selected European source markets.

# REGIONAL MANAGEMENT SOUTH EAST EUROPE

**AUSTRIA/SLOVAKIA • BALKANS • CZECH REPUBLIC •  
HUNGARY • SLOVENIA**

The high-potential source markets in the South East Europe territory were largely able to stabilise their overnight stays in 2021 after the heavy losses experienced in the first year of the pandemic. Countries in the Balkans, such as Bulgaria, Romania, Croatia and Slovenia, performed significantly better than the European market as a whole. Austria held on to fourth place in the ranking of the biggest source markets for inbound tourism to Germany.

**TRAVEL INTENTIONS  
IN EUROPE FROM  
JAN TO JUNE 2022**

Austria  
**50%**

Source: European Travel Commission: Monitoring Sentiment for Domestic and Intra-European Travel, wave 10, 1/2022: Intention to travel to another European country in the next six months. Selected European markets.



## Hungary **GERMAN.LOCAL.CULTURE. OOH CAMPAIGN**

- Campaign period: October/November 2021
- Advertising in metro stations and trams in Budapest
- Reach in metro: 12.2 million contacts

Reach in trams **14.1 million** CONTACTS



# REGIONAL MANAGEMENT AMERICAS/ISRAEL

## USA • CANADA • ISRAEL

The international market for long-haul travel was hit particularly hard by the coronavirus crisis. The volume of trips made to Germany from the US stabilised in 2021 compared to the prior year. Despite a sharp decline on pre-pandemic levels, the US remains by far Germany's most important overseas market.

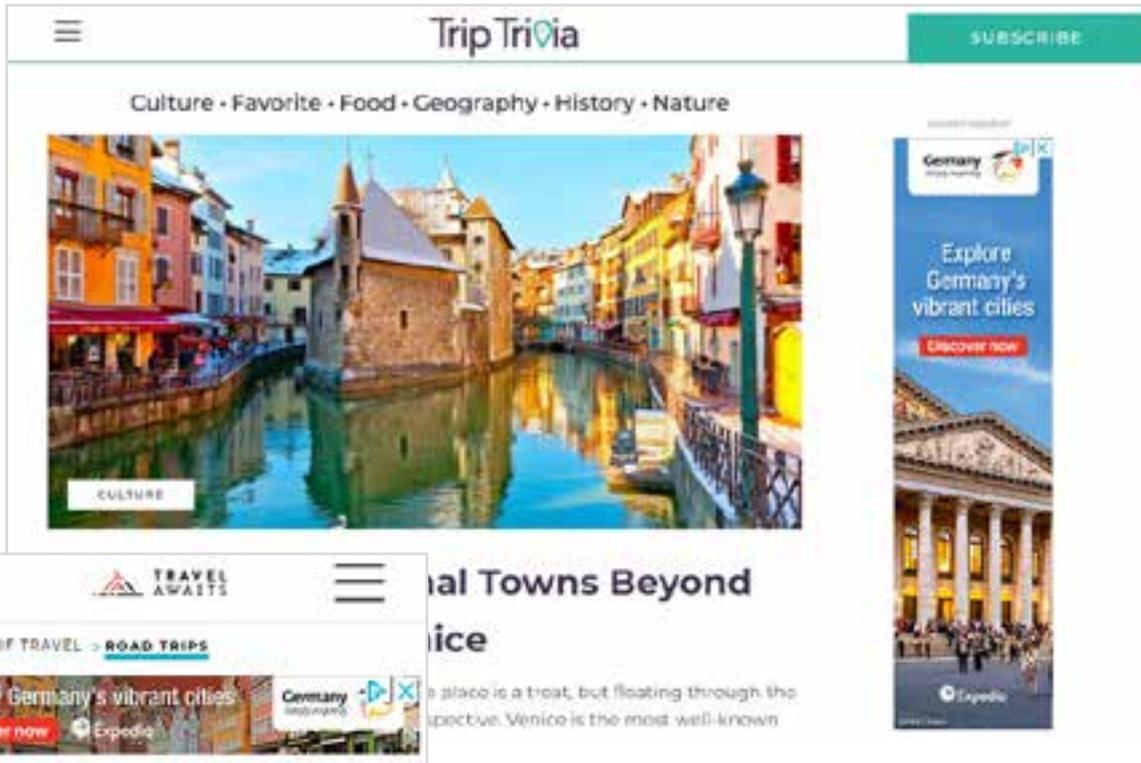
### USA

### GERMANY MEMORY GAME AND JIGSAW PUZZLE – PLAYABLE ADS

- Playable ads are a premium advertising format in the mobile games segment
- Around 213 million mobile gamers in the USA in 2020, and that figure is rising
- 90 per cent of phone time spent on apps and games
- Three creative elements: tutorial, interactive experience and call to action, e.g. to visit the GNTB website for further information
- Campaign period from late October 2021 to January 2022

**1.34  
million**  
**UNIQUE  
ENGAGEMENTS**





**US & Canada**  
**MACRO-REGIONAL**  
**EXPEDIA CAMPAIGN**

- Campaign period: December 2021 to February 2022
- Advertising for Germany incorporated on the US websites of the Expedia Group
- Elements: landing page, banner ads, passport ads, native tiles, native marquee cards

**15.6 million**  
**IMPRESSIONS**

**OTHER EXAMPLES OF MARKET-SPECIFIC CAMPAIGNS IN THE USA AND ISRAEL IN 2021/2022**

- Canada: **Social media campaign for travel advisors**
- Israel: **OTC campaign with Ophir Tours**
- US: **Lonely Planet influencer campaign**  
**Smart TV campaign**

# REGIONAL MANAGEMENT ASIA

## CHINA • JAPAN • INDIA • ARAB GULF STATES

The coronavirus pandemic brought international tourism from Asian source markets to a virtual standstill. And there were no signs of a recovery in 2021, despite a rise in travel intentions. The GNTB continued its promotional work with numerous market-specific measures to make the most of the huge market potential post-coronavirus.



**Japan**  
**LIVE-STREAM TALK EVENTS AS PART OF THE DISCOVER GERMANY FROM HOME CAMPAIGN**

- Online B2C talk show on the topic of 'Dragon Quest and Destination Germany' (views: 1,079)
- YouTube talk and 45 Twitter tweets: influencer leads a tour of Dresden (likes: 9,070, retweets: 1,608)
- Online live talk event with a major national newspaper, the Asahi Shimbun, and travel influencer Hirofumi Tomatsu (views: 12,732)

Total reach

**43.8 million**  
**CONTACTS**



**China**

**LIVE STREAMING SERIES:  
GERMAN TOWNS & CITIES**

Live streaming as a communication tool for end customers is hugely popular in China and is used extensively on a range of online platforms including Mafengwo and Sina Weibo.

- 24 events on six platforms
- Three main themes: *#Germany's towns & cities* with a virtual tour in twelve locations, the *#Travel+* talk show and *#German food & drink*.

**Live streaming in collaboration with  
Stuttgart Marketing on 20 May**

- Partial broadcast via Mercedes-Benz China
- Porsche Museum, guided tour of Stuttgart, Mercedes-Benz Museum, municipal library, Esslingen, V8 Hotel and Motorworld Region Stuttgart
- Viewers: 100,000/live engagement: 260,000

Total reach

**2 million**  
**CONTACTS**

**OTHER EXAMPLES OF MARKET-SPECIFIC  
CAMPAIGNS IN ASIA IN 2021/2022**

- Arab Gulf States: **Influencer trip with Wego**
- India: **Chatbot Anja answers questions about Destination Germany**
- Japan: **Twitter campaign**  
**Line Messenger campaign**



ORGANISATION, FACTS  
AND FIGURES

# OPTIMISING THE FRAMEWORK

Ongoing refinement of organisational structures makes it easier to act in an optimal way at all times in terms of finances, personnel and technology.



# FACTS AND FIGURES – THE IMPACT OF THE PANDEMIC ON THE GNTB’S DEVELOPMENT

The impact of the COVID-19 pandemic once again made measures and initiatives to digitalise internal processes the focus of administrative activities in 2021. Examples include the transition to, and use of, digital interfaces and financial tools in the areas of accounting and finance.

Even during these difficult times, needs-based and forward-thinking HR planning and development, and the economical use of resources remain key areas for action at head office. Continually reviewing and adapting administrative processes in order to optimise the sharing of core competencies between the GNTB’s administrative units and its departments and offices abroad remains an important cornerstone of the GNTB’s success.

## Financial management

The total income of the GNTB in 2021 was higher than estimated in the business plan. While membership subscriptions and grants remained stable, the GNTB generated more revenue through the provision of services. The increase in revenue correlates with an increase in funding from the Federal Ministry for Economic Affairs and Climate Action (BMWK).

The additional revenue from services and the increase in government funding were mainly used to boost marketing spend.

The GNTB’s capital expenditure rose significantly year on year in 2021. Collectively bargained pay rises and exchange rate losses abroad were the reasons for higher personnel costs. On top of this, global inflation caused an increase in other operating expenses.

By increasing the funding that it provides, the BMWK underlined the need to step up marketing activities in international source markets.

## Income

In 2021, income from services rose by 19.7 per cent (€0.8 million) year on year to €4.9 million (2020: €4.1 million). While this is certainly a positive development, income is still significantly below pre-pandemic levels. The BMWK

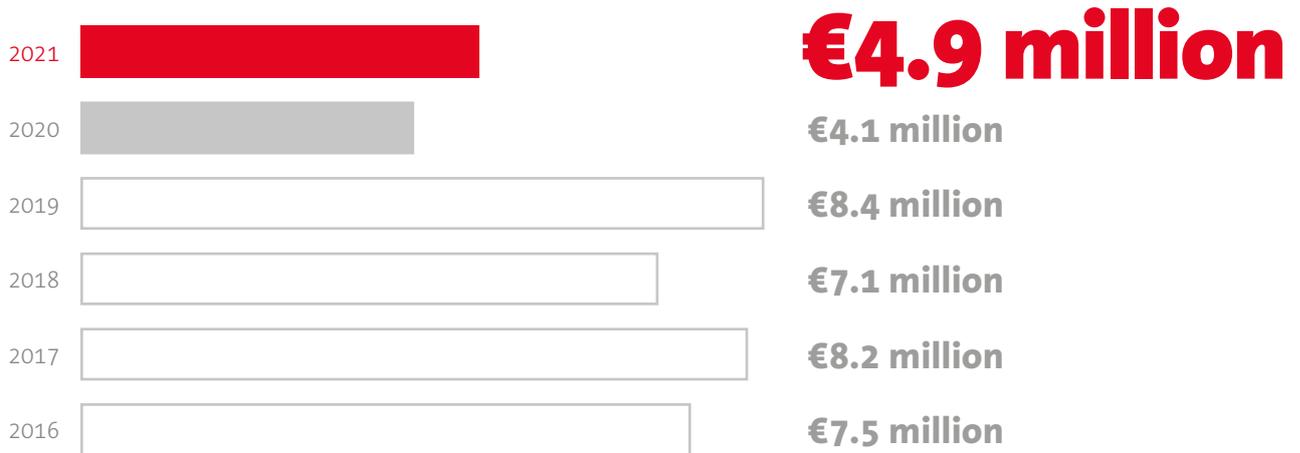
## GNTB FINANCIAL OVERVIEW: SOURCES AND APPROPRIATION OF FUNDS<sup>1)</sup>

1) Expressed in thousands of euros; 2) Some of the total amounts may contain a rounding difference of €1,000;

3) Project funding and externally funded projects.

<b>INCOME</b>	<b>2021</b>	<b>%</b>	<b>2020</b>	<b>%</b>	<b>2019</b>	<b>%</b>	<b>2018</b>	<b>%</b>	<b>2017</b>	<b>%</b>	<b>2016</b>	<b>%</b>	<b>2015</b>	<b>%</b>
Income from services	4,935	9.9	4,122	10.8	8,392	19.5	7,058	17.4	8,223	20.8	7,539	19.5	7,468	19.3
Grants from the BMWK	44,128	88.5	33,399	87.3	33,950	78.7	32,607	80.6	30,474	77.2	30,414	78.5	30,508	78.7
Grants and contributions from members	782	1.6	732	1.9	780	1.8	790	2.0	774	2.0	799	2.1	775	2.0
<b>Income from GNTB budget<sup>2)</sup></b>	<b>49,845</b>	<b>100.0</b>	<b>38,253</b>	<b>100.0</b>	<b>43,122</b>	<b>100.0</b>	<b>40,455</b>	<b>100.0</b>	<b>39,471</b>	<b>100.0</b>	<b>38,753</b>	<b>100.0</b>	<b>38,752</b>	<b>100.0</b>
Income from special projects <sup>3)</sup>	116		123		303		257		129		135		109	
<b>Total income (consolidated)</b>	<b>49,961</b>		<b>38,376</b>		<b>43,426</b>		<b>40,712</b>		<b>39,600</b>		<b>38,887</b>		<b>38,860</b>	
<b>Additional income from non-cash contributions</b>	<b>806</b>		<b>416</b>		<b>2,182</b>		<b>2,877</b>		<b>1,785</b>		<b>1,353</b>		<b>1,215</b>	
<b>EXPENDITURE</b>	<b>2021</b>	<b>%</b>	<b>2020</b>	<b>%</b>	<b>2019</b>	<b>%</b>	<b>2018</b>	<b>%</b>	<b>2017</b>	<b>%</b>	<b>2016</b>	<b>%</b>	<b>2015</b>	<b>%</b>
Personnel expenditure for marketing and administration	12,453	25.0	11,984	31.3	11,513	26.7	11,385	28.1	11,341	28.7	11,443	29.5	11,094	28.6
Other operating expenses	3,110	6.2	3,006	7.9	2,944	6.8	2,758	6.8	2,772	7.0	2,722	7.0	2,849	7.4
Capital investment	351	0.7	196	0.5	373	0.9	257	0.6	356	0.9	321	0.8	305	0.8
Marketing spend	33,931	68.1	23,067	60.3	28,292	65.6	26,055	64.4	25,002	63.3	24,267	62.6	24,503	63.2
<b>Expenditure from GNTB budget<sup>2)</sup></b>	<b>49,845</b>	<b>100.0</b>	<b>38,253</b>	<b>100.0</b>	<b>43,122</b>	<b>100.0</b>	<b>40,455</b>	<b>100.0</b>	<b>39,471</b>	<b>100.0</b>	<b>38,753</b>	<b>100.0</b>	<b>38,751</b>	<b>100.0</b>
Expenditure on special projects <sup>3)</sup>	116		123		303		257		129		135		109	
<b>Total expenditure (consolidated)</b>	<b>49,961</b>		<b>38,376</b>		<b>43,426</b>		<b>40,712</b>		<b>39,600</b>		<b>38,887</b>		<b>38,860</b>	
<b>Use of additional income from non-cash contributions</b>	<b>806</b>		<b>416</b>		<b>2,182</b>		<b>2,877</b>		<b>1,785</b>		<b>1,353</b>		<b>1,215</b>	

## INCOME FROM INTERNATIONAL MARKETING SERVICES



increased its funding from €34.5 million to €44.5 million. This extra €10 million in 2021 was used to offset the drop in revenue since the start of the pandemic and to boost the marketing activities for the recovery campaigns. Income from grants and contributions held steady at €0.8 million despite the crisis (2020: €0.7 million). In an encouraging development, non-cash contributions from our tourism partners grew to €0.8 million (2020: €0.4 million). All of the non-cash contributions were used for marketing purposes and

formed part of the financial contribution made by the tourism industry.

### Expenditure

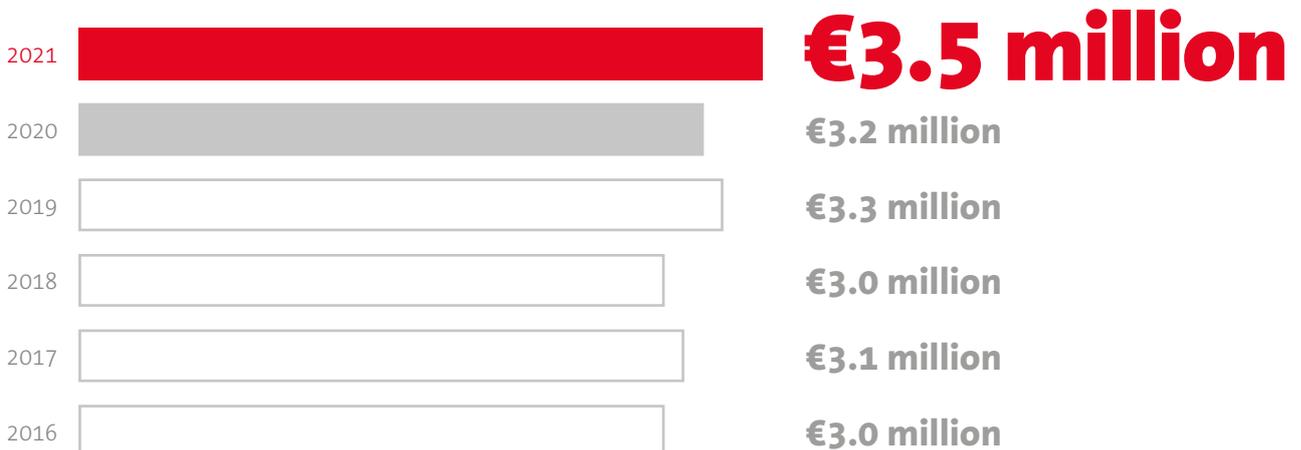
Personnel costs rose by 3.9 per cent (€0.5 million) to €12.5 million (2020: €12.0 million) as a result of collectively bargained pay rises and exchange rate losses. Nonetheless, personnel costs remained below the target set in the 2021 business plan. By reassigning these savings, an additional €0.2 million became available to spend on marketing.

Inflation-related price rises pushed other operating costs up 3.5 per cent to €3.1 million (2020: €3.0 million).

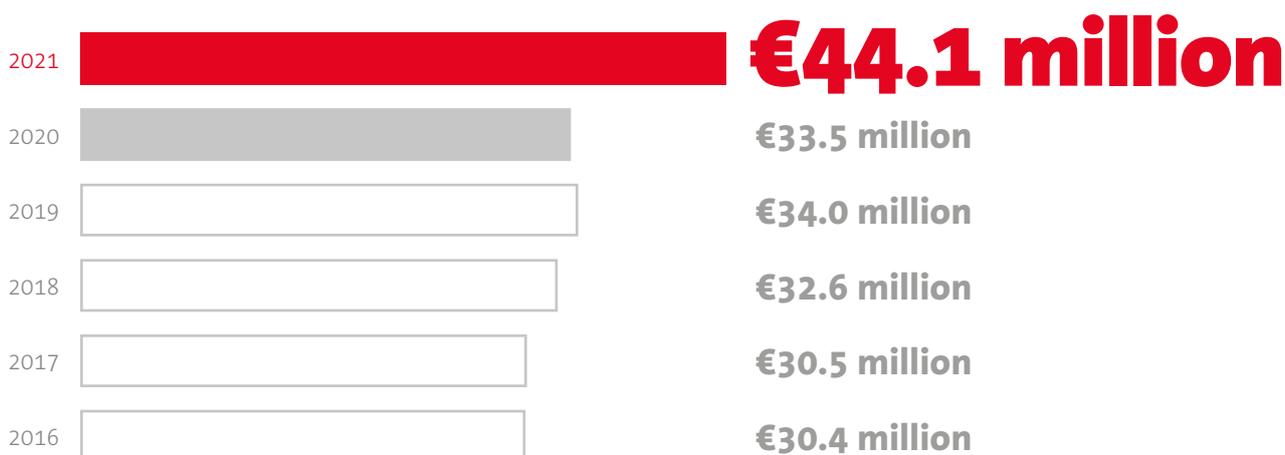
Capital expenditure rose to €0.4 million in 2021 as a result of IT projects and replacement purchases for electric vehicles.

Thanks to the additional government funding and a modest increase in income from services, marketing spend climbed to €33.9 million (2020:

## OTHER OPERATING EXPENSES, INCLUDING CAPITAL INVESTMENT



## GRANTS FROM THE BMWK



€23.1 million). The proportion of the GNTB's overall budget spent on marketing rose to 68.1 per cent (2020: 60.3 per cent).

Overall, the financial performance of the GNTB in 2021 was very good.

### Information technology

The procurement of IT equipment was severely delayed due to the coronavirus pandemic and the resulting long delivery times. Nevertheless, our IT structures were further adapted to the requirements of remote working, while the increased use of laptops expanded the opportunities for employees to work away from the office.

As in many areas, the restrictions on contact with others led our advisory services to switch to online-only formats. There was no tangible impact on current projects.

### E-invoicing/E-Akte file management

In collaboration with the Finance department, the necessary IT infrastructure, including servers, databases,

network access and applications, was put in place to facilitate the implementation of the German government's e-invoicing and E-Akte electronic file management.

### Cloud migration

The tender for the cloud migration strategic project was completed and initial preparations for implementation began. The first step is to migrate Microsoft applications into the Azure cloud with the aim of improving remote working and collaboration. Key basic functions that underpin a hybrid infrastructure, such as synchronized user accounts, are being put in place. The coming weeks will see the establishment of the security environment, the migration of email mailboxes and the switch from Skype for Business to MS Teams.

Further applications, including SharePoint and data services, are scheduled for migration over the course of the year. This will put in place another building block for the workplace of the future.

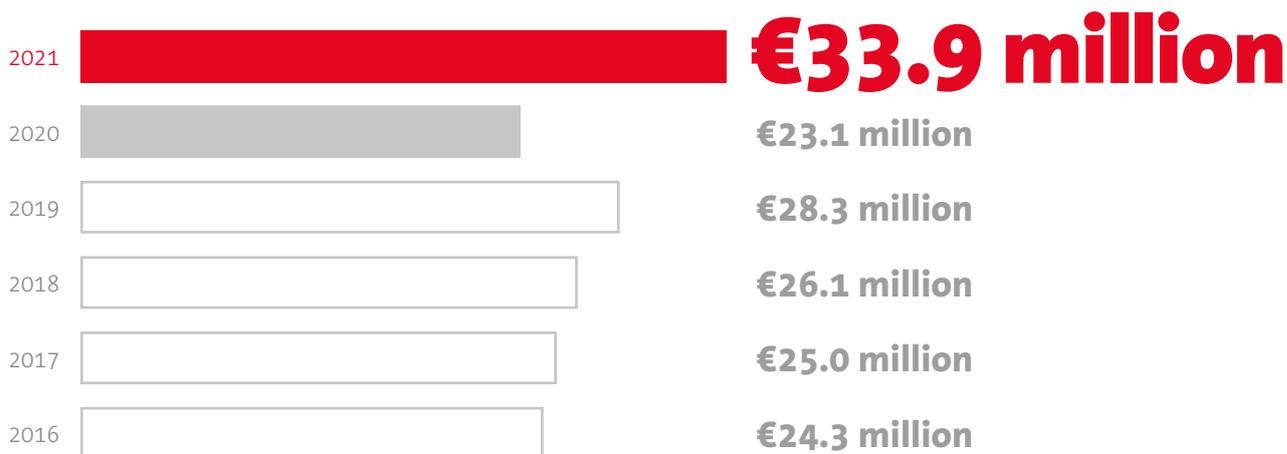
### Data protection at the GNTB

Increasing digitalisation also presented a challenge when it came to data protection at the GNTB.

Personal data was always processed in accordance with applicable data protection laws, such as GDPR in the EU and any country-specific data protection regulations that apply to the GNTB. Our privacy policy informed the public of how, for what purpose and to what extent we record, use and process personal data. Data subjects were also informed of their statutory rights. The privacy policy is published on the GNTB website under the URL [www.germany.travel/en/about-us/data-protection.html](http://www.germany.travel/en/about-us/data-protection.html).

The GNTB continued to implement and refine various technical and organisational measures in 2021 to ensure that personal data is protected as fully as possible.

## MARKETING SPEND



### Human resources

The pandemic continued to influence the HR department’s work in 2021. Thanks to the smooth coordination between HR, the employee representatives, the health and safety officer and the company doctor, the changing requirements of the government and other policymakers were implemented in a way that is transparent for staff.

In accordance with the legal requirements, our employees were able to continue working remotely in 2021. Virtually all areas of the GNTB made use of this option, while we ensured that all employees who wanted to work at head office were able to do so safely.

The GNTB employment plan for 2021 covered a total of 153.1 full-time equivalent (FTE) positions, which were covered by nearly 200 full-time and part-time employees. Of this total, 76.1 FTEs are at head office, 75 are based abroad, and there are two executive positions.

### Training and development: new tourism recruits

The GNTB is currently training a total of ten apprentices in two specialisms. At the end of 2021, we had four marketing communications apprentices and six tourism apprentices.

Five of our apprentices took their exams in 2021, one of whom was the best in her specialism in the Hessen federal state.

The apprentices spend time in all relevant departments at the head office in Frankfurt, and during a four-week work placement they learn what one of the GNTB’s European foreign representative offices does. We are delighted that we were able to offer these opportunities despite the difficulties in 2021, as they provide the apprentices with a wealth of expertise and soft skills to take into their future career in tourism.

### Degree apprenticeships

Our first degree apprentices completed their tourism management course with a bachelor of arts. Thanks to their outstanding performance, all graduates were offered a position at head

office. There are now eight students who provide support with day-to-day departmental matters when at the office.

### Developments in training

The pandemic meant there was a greater acceptance of online training, while hybrid learning, i.e. a combination of classroom-based and online teaching, also increased.

The workforce has come to value online learning, as the training and coaching sessions are shorter, there are no travel costs and sessions can be arranged more flexibly and at shorter notice. In 2021, 80 per cent of internal and external training at the GNTB took place online.

Training is vital if we are to manage the structural changes in the market. In addition to job-related training, employees should also acquire, hone and expand their people skills. The GNTB supports this by offering seminars and training courses geared to the activities of its employees in Germany and abroad.



# GNTB MEMBERS, SPONSORS AND PARTNERS

(as at February 2022)

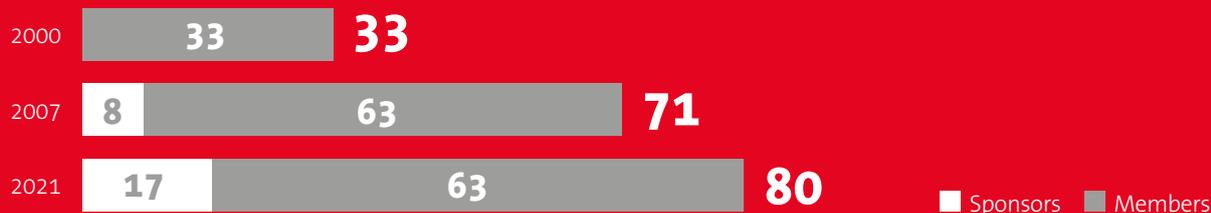
A key task of the network is to help the many small and medium-sized enterprises in the tourism sector to access international markets. As members, they can make use of the GNTB's expertise, take part in cost-efficient and targeted marketing campaigns, and appear alongside the GNTB at trade fairs, workshops and roadshows.

## COMPANIES



**7** • 7pat GmbH • **A** • Accor Hospitality Germany GmbH • Amadeus Deutschland GmbH • Avis Budget Autovermietung GmbH & Co. KG • **B** • Best Western Hotels Central Europe GmbH • **D** • DB Vertrieb GmbH • Deutsche Hospitality • Deutsche Lufthansa AG • Deutsches Weininstitut GmbH • **E** • ERGO Reiseversicherung AG • Europa-Park GmbH & Co Mack KG • **F** • Flughafen Düsseldorf GmbH • Flughafen München GmbH • Fraport AG • Friedrichstadt-Palast Betriebsgesellschaft mbH • **G** • Global Blue Deutschland GmbH • Grand City Hotels GmbH • **H** • HanseMerkur ReiseVersicherungsgruppe • Hertz Autovermietung GmbH • **J** • JCB International Ltd., German Branch • **L** • Lindner Hotels AG • **M** • Maritim Hotelgesellschaft mbH • Mastercard Europe SA • McArthurGlen Management GmbH • Messe Berlin GmbH • **O** • Outletcity Metzingen Holy AG • **P** • Passionsspiele Oberammergau Vertriebs GmbH & Co. KG • **R** • Ringhotels e.V. • **S** • Sixt SE • **T** • TUI AG • **V** • Value Retail Management Germany GmbH • VISA European Management Services Ltd., German Branch • **W** • Wellnest-Hotels & Resorts GmbH

## STRONG GROWTH IN MEMBERSHIP AND SPONSORS



**63 GNTB members:** 33 tourism companies, 16 regional marketing organisations and 14 associations and organisations

## TOURISM MARKETING ORGANISATIONS OF THE FEDERAL STATES



**B** • Bayern Tourismus Marketing GmbH • **B** • Berlin Tourismus & Kongress GmbH • **H** • HA Hessen Agentur GmbH – Tourismus- und Kongressmarketing • Hamburg Tourismus GmbH • **I** • Investitions- und Marketinggesellschaft Sachsen-Anhalt mbH (IMG) • **R** • Rheinland-Pfalz Tourismus GmbH • **T** • Tourismus NRW e.V. • Thüringer Tourismus GmbH • Tourismus Marketing Gesellschaft Sachsen mbH (TMGS) • Tourismus-Agentur Schleswig-Holstein GmbH (TASH) • TourismusMarketing Niedersachsen GmbH (TMN) • Tourismus Marketing GmbH Baden-Württemberg (TMBW) • Tourismus-Marketing Brandenburg GmbH (TMB) • Tourismusverband Mecklenburg-Vorpommern e.V. • Tourismus Zentrale Saarland GmbH • **W** • WFB Wirtschaftsförderung Bremen GmbH

## CORPORATE BODIES, ASSOCIATIONS, FOUNDATIONS AND INSTITUTIONS



**A** • Allgemeiner Deutscher Fahrradclub e.V. (ADFC) • **B** • Bundesverband der Deutschen Tourismuswirtschaft e.V. (BTW) • **D** • Deutscher Heilbäderverband e.V. (DHV) • Deutscher Hotel- und Gaststättenverband e.V. (DEHOGA) • Deutscher Industrie- und Handelskammertag e.V. (DIHK) • Deutscher Reiseverband e.V. (DRV) • Deutscher Tourismusverband e.V. (DTV) • **G** • German Convention Bureau e.V. (GCB) • **H** • Historic Highlights of Germany e.V. • Hotelverband Deutschland (IHA) e.V. • **M** • Magic Cities Germany e.V. • **R** • RDA Internationaler Bustouristik Verband e.V. • **U** • UNESCO-Welterbestätten Deutschland e.V. • **W** • Willy Scharnow-Stiftung für Touristik

## SPONSORS

Companies and organisations that are interested in the GNTB but do not fulfil the criteria for membership can join the GNTB as sponsors. Corporate bodies, associations and foundations from the worlds of research, consultancy, media, the arts and sport are taking the opportunity to benefit from the GNTB's global sales and marketing network. Sponsors belong to the GNTB's Advisory Board and can use the GNTB sponsor logo in their marketing.

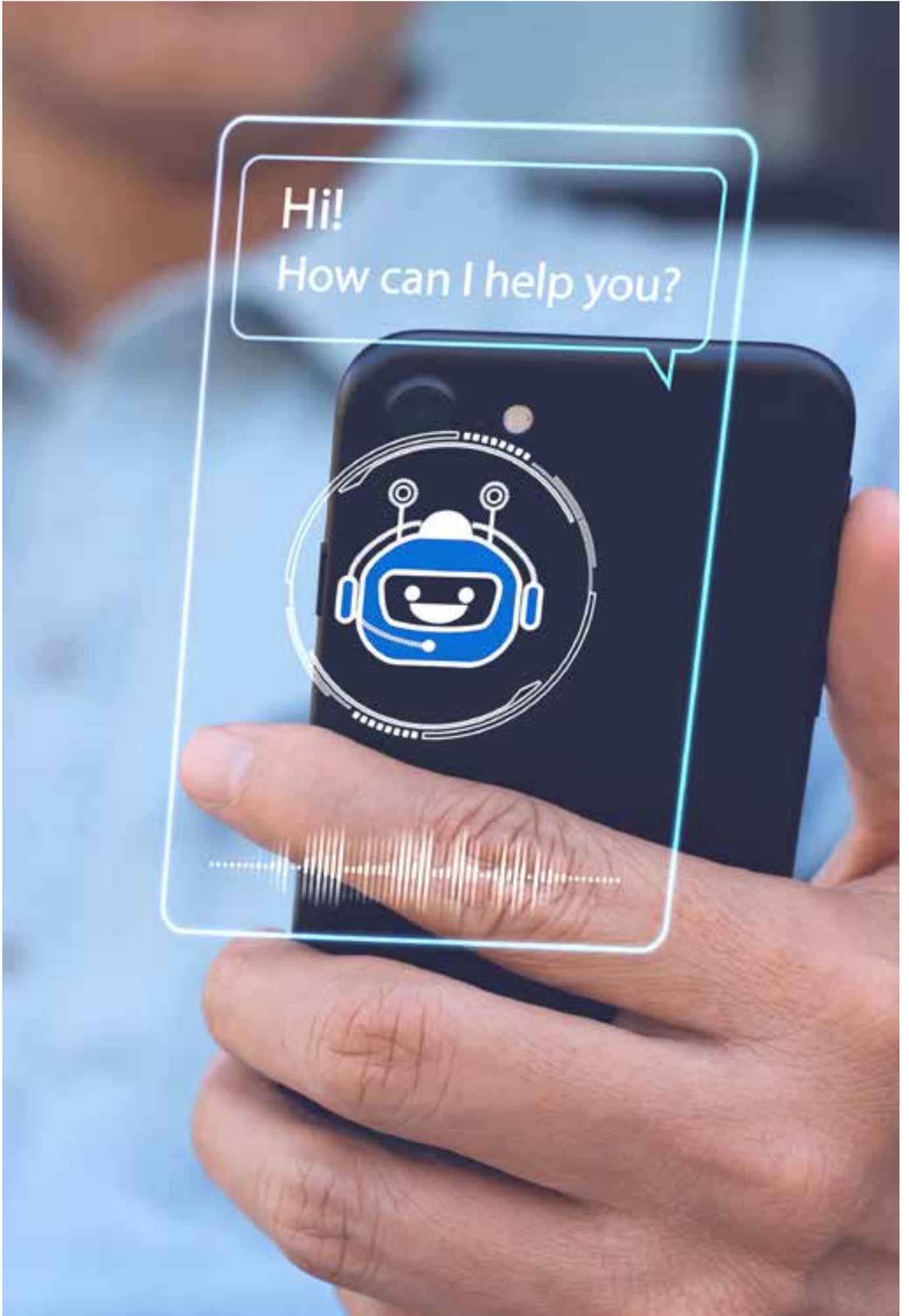


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elected at the 123rd general meeting on 12 November 2020 (as at February 2022)



**BRIGITTE GOERTZ-MEISSNER**

President of the Board of Directors

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**HUBERT AIWANGER**

Bavarian State Minister of Economic Affairs, Regional Development and Energy



**REINHARD MEYER**

President of the German Tourism Association (DTV)



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President of the German Hotel and Restaurant Association (DEHOGA)

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Senior Vice President, Customer Experience, Lufthansa Group Airlines



**Andreas Braun**

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President of the German Travel Association (DRV)



**Karina Kaestner**  
Vice President, Partner Management, DB Vertrieb GmbH



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



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**Regine Sixt**  
Senior Executive Vice President of SIXT International Marketing, SIXT SE



**Dr Volker Treier**  
Head of Foreign Trade and Member of the Board of Directors at the Association of German Chambers of Industry and Commerce (DIHK)



**Monika Wiederhold**  
Executive Vice President, Global Ecosystem Initiatives / Senior Group Representative, Germany Amadeus IT Group S.A.

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until 31 January 2022  
Director in charge of Subdepartment I D, Federal Ministry for Economic Affairs and Climate Action



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



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

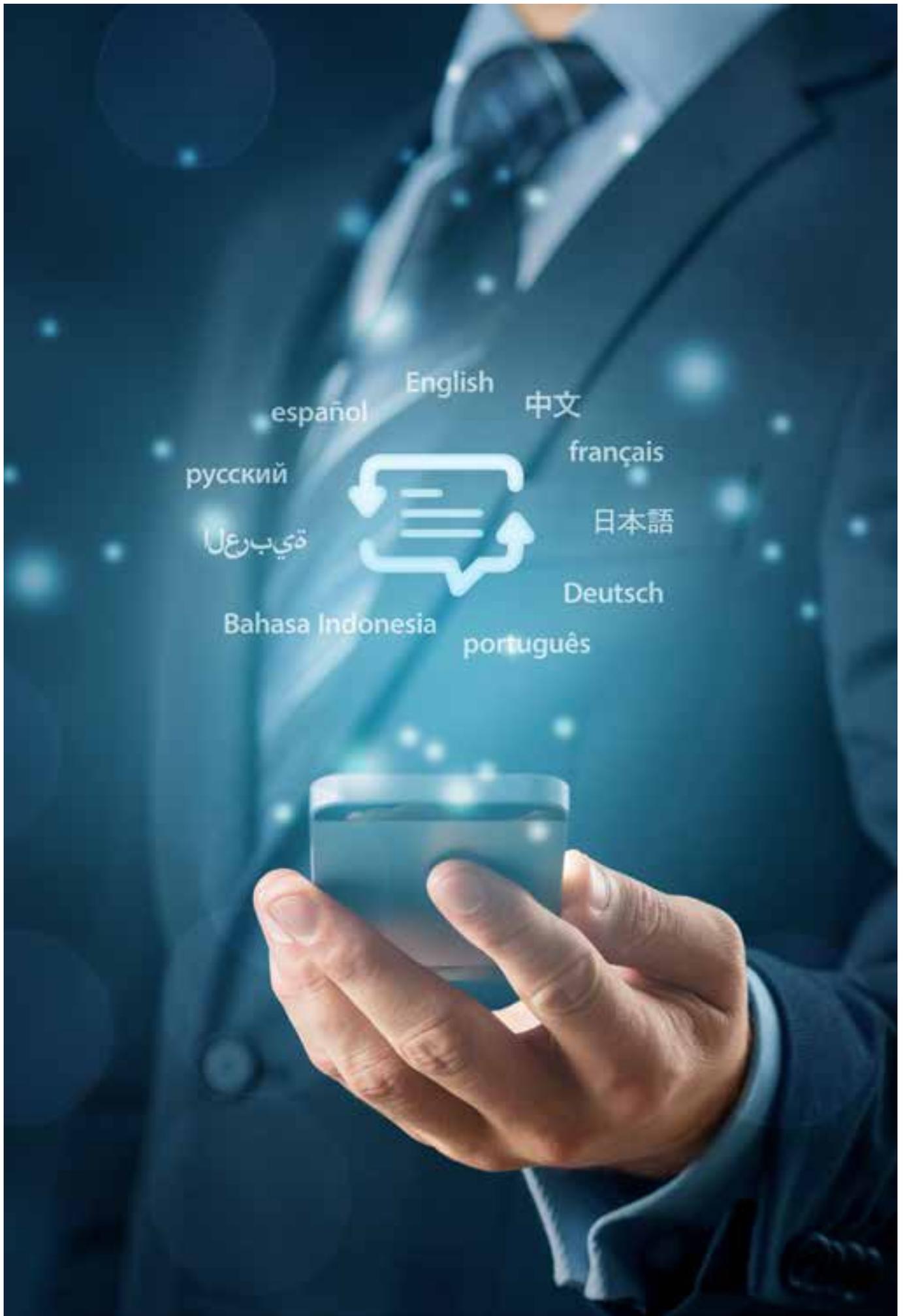
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**Klaus Laepple** President of the Federal Association of the German Tourism Industry (ret.); Honorary President of the German Travel Association



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



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elected at the 123rd general meeting on 12 November 2020 (as at February 2022)

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### Dirk Binding

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

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### Burkhard Kieker

Managing Director of Berlin Tourismus & Kongress GmbH – visitBerlin

## SECOND DEPUTY CHAIRMAN

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### Professor Bernd Eisenstein

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### Martin Katz

Group Destination Director  
(until November 2021)  
FTI Group

### Karina Kaestner

Vice President, Partner Management, DB  
Vertrieb GmbH

### Professor Harald Zeiss

Professor of Tourism Management with a focus on sustainability  
Harz University of Applied Sciences

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### Ministerial Counsellor Iris Reimold

Head of Department G 10 – Policy Matters, Finance Policy and Competition Policy, Federal Ministry for Digital and Transport

### Counsellor Tilman Enders

Head of Department 404 – International Technology Policy, Digital Economy and Mobility, Foreign Office

### Dr Heinrich Neumann

Head of Department 311 – Finance, Economic Affairs and Digital Policy (until September 2021), Press and Information Office of the Federal Government

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

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Ministry of Justice and Migration

### BAVARIA

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Bavarian Ministry of Economic Affairs, Regional Development and Energy

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Ministry for Economic Affairs, Labour and Energy

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#### Bernd Meyer

Office of Economic Affairs and Innovation

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#### May-Britt Pürschel

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Ministry for Economic Affairs, Innovation, Digitalisation and Energy

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Rhineland-Palatinate Ministry for Economy, Transport, Agriculture and Viniculture

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Ministry for Economic Affairs, Labour, Energy and Transport

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elected at the 123rd general meeting on 12 November 2020 (as at February 2022)

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### Volker Bremer

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Managing Director of Tourismus-Agentur  
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Managing Director of  
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The 47 tourism companies and associations that are members of the GNTB.

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Managing Director

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#### Frank Hofmann

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#### Marcel Noee

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#### Fabiola Nau

Leisure Sales, Home Markets

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(continued)

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**Cornelia Koebele**

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**Till Weigl**

General Manager

### MARITIM HOTELGESELLSCHAFT MBH

**Ulla Schulz**

Manager, International Sales Office

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Chief Marketing Officer, Messe Berlin

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Senior Executive, Relationship Marketing

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Marketing & Event Specialist

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Deputy CEO

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**Barbara Lünenborg**

Corporate Director, Sales

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Business Development Manager, Public Sector

### PASSIONSSPIELE OBERAMMERGAU VERTRIEBS GMBH & CO. KG

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Managing Director

### TUI GROUP

**Bernd Hoffmann**

Head of Public Policy/TUI Group Office Berlin

### VISA EUROPE MANAGEMENT SERVICES LTD.

**Julia Tönnemann**

Senior Manager, Acceptance Development

# ADDRESSES OF GNTB REGIONAL MANAGEMENT OFFICES

(as at February 2022)

## REGIONAL MANAGEMENT NORTH WEST EUROPE

### NETHERLANDS

#### Michaela Klare

michaela.klare@germany.travel  
Tel: +31 (0)20 311 3921

#### GNTB foreign representative office Netherlands

Postbus 12051, 1100 AB Amsterdam

### UK/IRELAND

#### Beatrix Haun

beatrix.haun@germany.travel  
Tel: +44 (0)20 7317 0912

#### GNTB foreign representative office

United Kingdom/Ireland  
60 Buckingham Palace Road  
London, SW1W 0AH

### BELGIUM/LUXEMBOURG

#### Kristina Hansen (interim)

kristina.hansen@germany.travel  
Tel: +32 (0)22 404 581

#### GNTB foreign representative office Belgium/Luxembourg

Avenue des Arts 10-11, 1210 Brussels

## REGIONAL MANAGEMENT NORTH EAST EUROPE/RUSSIA

### DENMARK

#### Bo Lauridsen

bo.lauridsen@germany.travel  
Tel: +45 (0)33 436 818

#### GNTB foreign representative office Denmark

Amaliegade 13  
1256 Copenhagen

### SWEDEN

#### Iris Müller

iris.mueller@germany.travel  
Tel: +46 (0)86 651 884

#### GNTB sales and marketing agency Sweden

Tyska Turistbyrå AB  
Box 185  
SE115 53 Stockholm

### NORWAY

#### Joelle Janz

joelle.janz@germany.travel  
Tel: +47 (0)22 128 229

#### GNTB sales and marketing agency Norway

Drammensveien 111 B, 0273 Oslo

### POLAND

#### Tomasz Pędzik

tomasz.pedzik@germany.travel  
Tel: +48 (0)22 531 0528

#### GNTB sales and marketing agency Poland

c/o Deutsch-Polnische Industrie- und  
Handelskammer  
ul. Miodowa 14  
00-246 Warsaw

### RUSSIA

#### Alla Belikova

alla.belikova@germany.travel  
Tel: +7 (0)495 281 5125

#### GNTB sales and marketing agency Russia

c/o Pro-Mark Company  
Serafimovicha street, 2, office 233  
119072 Moscow

### FINLAND

#### Bo Lauridsen

GNTB Denmark  
bo.lauridsen@germany.travel  
Tel: +45 (0)33 436 818

#### Marketing through

Valve Communications Oy

## REGIONAL MANAGEMENT SOUTH EAST EUROPE

### AUSTRIA AND SLOVAKIA

#### László Dernovics

laszlo.dernovics@germany.travel  
Tel: +43 (0)1 5132 79210

#### GNTB foreign representative office

Austria and Slovakia  
Mariahilfer Strasse 54, 1070 Vienna

### CZECH REPUBLIC

#### Jan Pohaněl

jan.pohanel@germany.travel  
Tel: +420 (0)2 2149 0374

#### GNTB sales and marketing agency Czech Republic

c/o Deutsch-Tschechische Industrie- und  
Handelskammer  
Václavské náměstí 40,  
110 00 Prague

### HUNGARY

#### Miklós Czeiszing

miklos.czeiszing@germany.travel  
Tel: +36 (0)1 345 7633

#### GNTB sales and marketing agency Hungary

c/o Deutsch-Ungarische Industrie- und  
Handelskammer  
Lövház u. 30., H-1024 Budapest

### SLOVENIA

#### Maja Horvat

maja.horvat@germany.travel  
Tel: +386 (0)1 252 8855

#### GNTB sales and marketing agency Slovenia

c/o Deutsch-Slowenische Industrie- und  
Handelskammer  
Poljanski nasip 6, 1000 Ljubljana

### BOSNIA AND HERZEGOVINA, BULGARIA, CROATIA, MONTENEGRO, ROMANIA AND SERBIA

#### Cristian Sallai

cristian.sallai@germany.travel  
Tel: +381 (0)11 655 5460

#### GNTB sales and marketing agency Balkans

c/o Danube Competence Center (DCC)  
Regionalbüro  
Knez Mihailova 30  
11000 Belgrade

## REGIONAL MANAGEMENT SOUTH WEST EUROPE

### FRANCE

#### Bénédicte Richer-Langlais

benedicte.richer-langlais@germany.travel  
Tel: +33 (0)1 4020 1703

**GNTB foreign representative office France**  
8 rue de Milan, 75009 Paris

### SWITZERLAND

#### Harald Henning

harald.henning@germany.travel  
Tel: +41 (0)44 213 2211

**GNTB foreign representative office Switzerland**  
Freischützgasse 3, 8004 Zurich

### SPAIN/PORTUGAL

#### Ulrike Bohnet

ulrike.bohnet@germany.travel  
Tel: +34 (0)91 360 0393

**GNTB foreign representative office Spain**  
c/ San Augustin 2-1° derecha  
Plaza de las Cortes  
28014 Madrid

### ITALY

#### Agata Marchetti (interim)

agata.marchetti@germany.travel  
Tel: +39 (0)2 0066 7794

**GNTB foreign representative office Italy**  
Foro Buonaparte 12, 20121 Milan

## REGIONAL MANAGEMENT AMERICAS/ISRAEL

### USA/NEW YORK

#### Ricarda Lindner

ricarda.lindner@germany.travel  
Tel: +1 (0)212 661 7858

**GNTB foreign representative office New York**  
1350 Broadway, Suite 440  
New York, NY 10018

### CANADA

#### Anja Brokjans

anja.brokjans@germany.travel  
Tel: +1 (0)416 935 1896 ext. 224

**GNTB sales and marketing agency Canada**  
c/o VoX International Inc  
130 Queens Quay East, Suite 1200,  
Toronto, ON M5A 0P6

### ISRAEL

#### Goldi Müller

goldi.mueller@germany.travel  
Tel: +972 (0)35 135 307

**GNTB sales and marketing agency Israel**  
c/o Lufthansa German Airlines  
37, She'erit Israel Street  
68165 Tel Aviv-Yafo

### USA/LOS ANGELES

#### Fritzi Luca

fritzi.luca@germany.travel  
Tel: +1 (0)424 309 0827

**GNTB sales and marketing agency  
Los Angeles**  
c/o Myriad Marketing  
5800 Bristol Pkwy, Suite 660  
Culver City, CA 90230

## REGIONAL MANAGEMENT ASIA/AUSTRALASIA

### JAPAN

#### Akira Nishiyama

akira.nishiyama@germany.travel  
Tel: +81 (0)3 3586 0380

**GNTB foreign representative office Japan**  
7-5-56 Akasaka, Minato-Ku  
Tokyo 107-0052

### CHINA/MAINLAND

#### Zhaohui Li

zhaohui.li@germany.travel  
Tel: +86 (0)10 6590 6406

**GNTB foreign representative office  
China / Mainland**  
6th Floor, D1 Unit 602D, DRC Liangmaqiao  
Diplomatic Office Building  
19 Dongfang East Road, Chaoyang District,  
100600 Beijing, PR China

### CHINA/HONG KONG

#### Stephanie Heydolph (until 31 December 2021)

stephanie.heydolph@germany.travel  
Tel: +852 (0)25 265 481

**GNTB sales and marketing agency  
China/Hong Kong**  
19/F, COFCO Tower,  
262 Gloucester Road,  
Causeway Bay, Hong Kong

### INDIA

#### Romit Theophilus

romit.theophilus@germany.travel  
Tel: +91 (0)11 4937 1001

**GNTB sales and marketing agency India**  
c/o Airplus Travel Services Pvt. Ltd.  
Street number 5, House number 8  
Shanti Niketan, New Delhi-110021

### ARAB GULF STATES

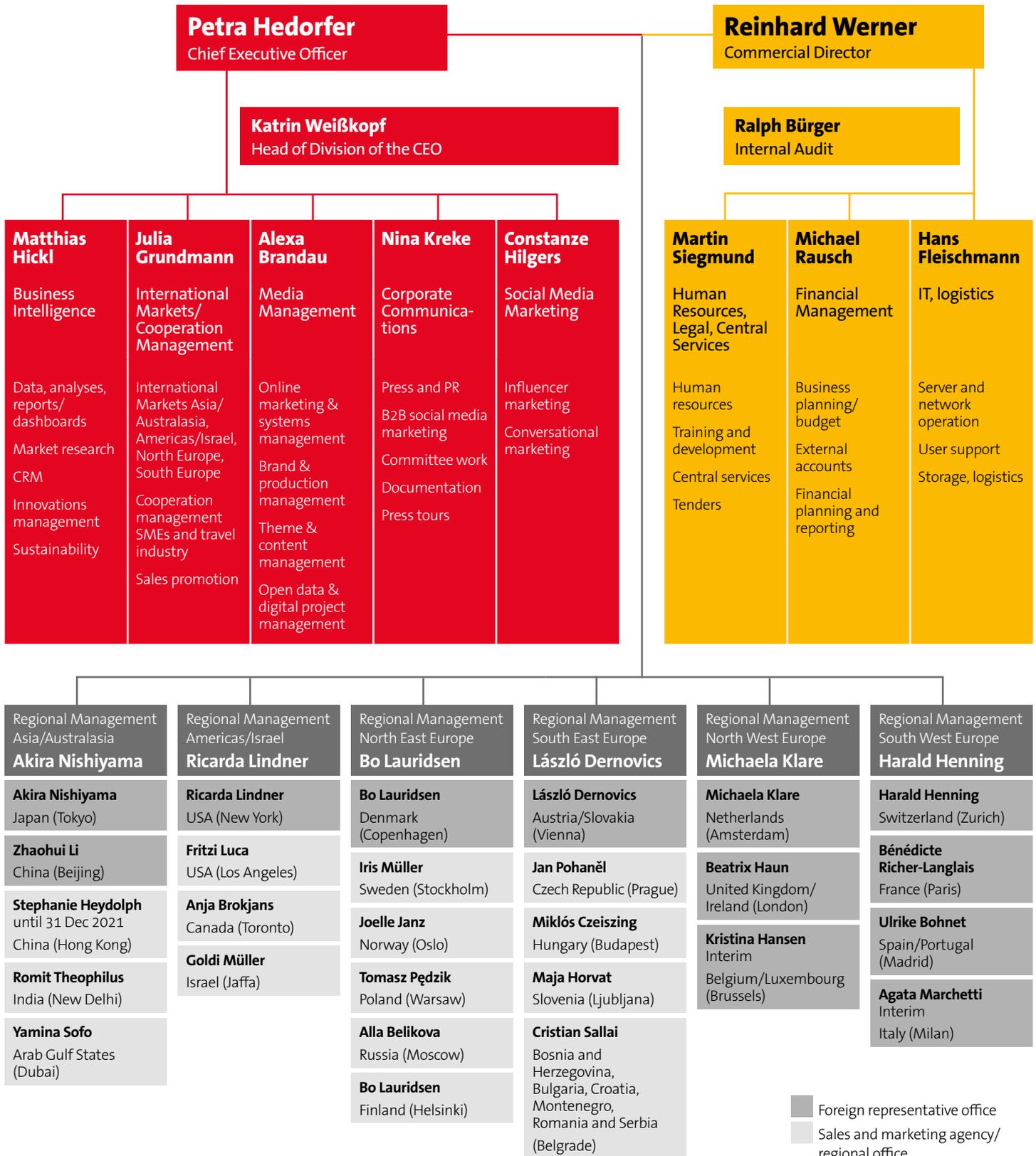
#### Yamina Sofo

yamina.sofo@germany.travel  
Tel: +971 (0)4 447 0588

**GNTB sales & marketing agency Arab Gulf States**  
c/o Deutsch-Emiratische Industrie- und  
Handelskammer (AHK)  
Uborra Tower, 27th floor, Office 2701,  
Al Abraj Street (Marasi Drive), Business Bay  
PO. Box 7480, Dubai, U.A.E.

# STRUCTURE OF THE GERMAN NATIONAL TOURIST BOARD

(as at February 2022)



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