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GNTB forecast

2030

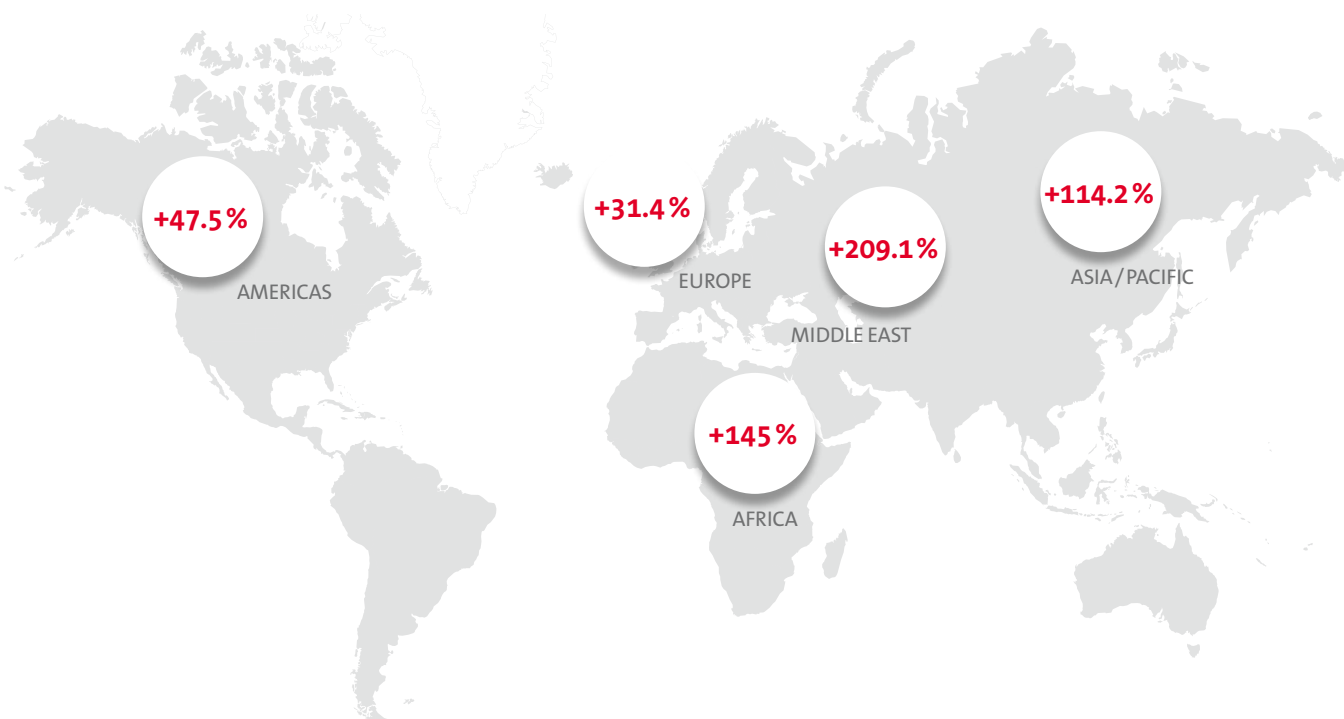
for inbound tourism to Germany

Identifying opportunities for growth.



The global **travel market** will **continue to expand** in the years ahead.

International arrivals in 2030:
1.8 billion arrivals worldwide **+66.4 per cent**



Source: World Tourism Organization (UNWTO), international arrivals.

- Tourism is the **growth sector** of the 21st century
- Europe will still be the **biggest global destination region** in 2030
- **Germany's inbound tourism industry benefits particularly strongly** from global growth

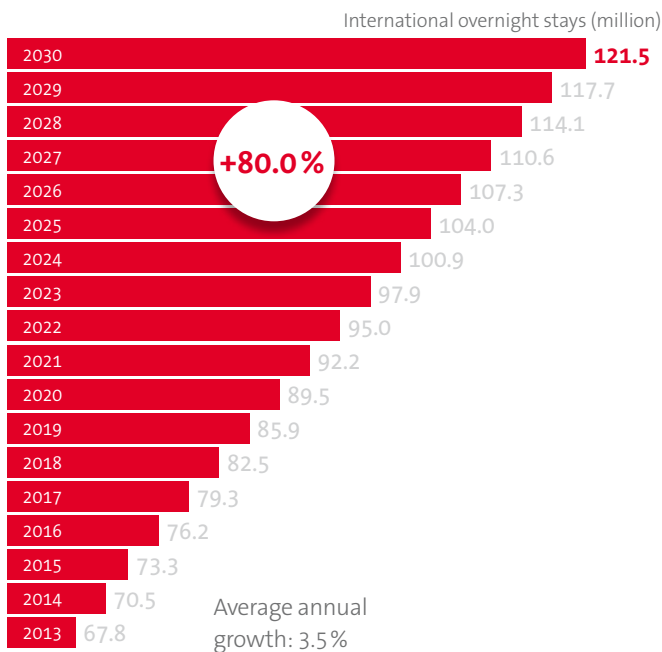
International arrivals			
	2013 (million)	2030 (million)	Growth (%)
WORLD	1,087	1,809	+66.4
EUROPE	566.3	744	+31.4
ASIA/PACIFIC	249.8	535	+114.2
AMERICAS	168.1	248	+47.5
AFRICA	54.7	134	+145.0
MIDDLE EAST	48.2	149	+209.1

Source: World Tourism Organization (UNWTO), international arrivals.



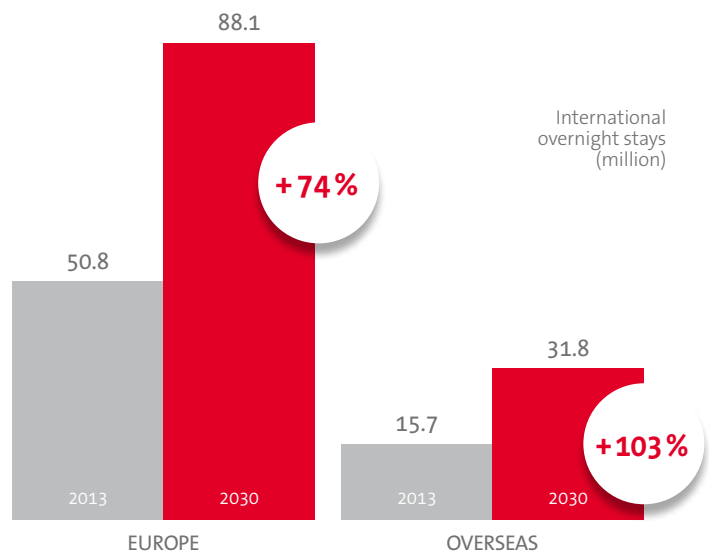
By 2030 Germany's inbound tourism industry could potentially reach **121.5 million** overnight stays.

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



Source: GNTB/Claus Sager 2014; *excl. camping.

Inbound tourism:
two thirds of overall increase from Europe and **one third** from overseas



Source: GNTB/Claus Sager 2014, *excl. camping, figures are rounded.

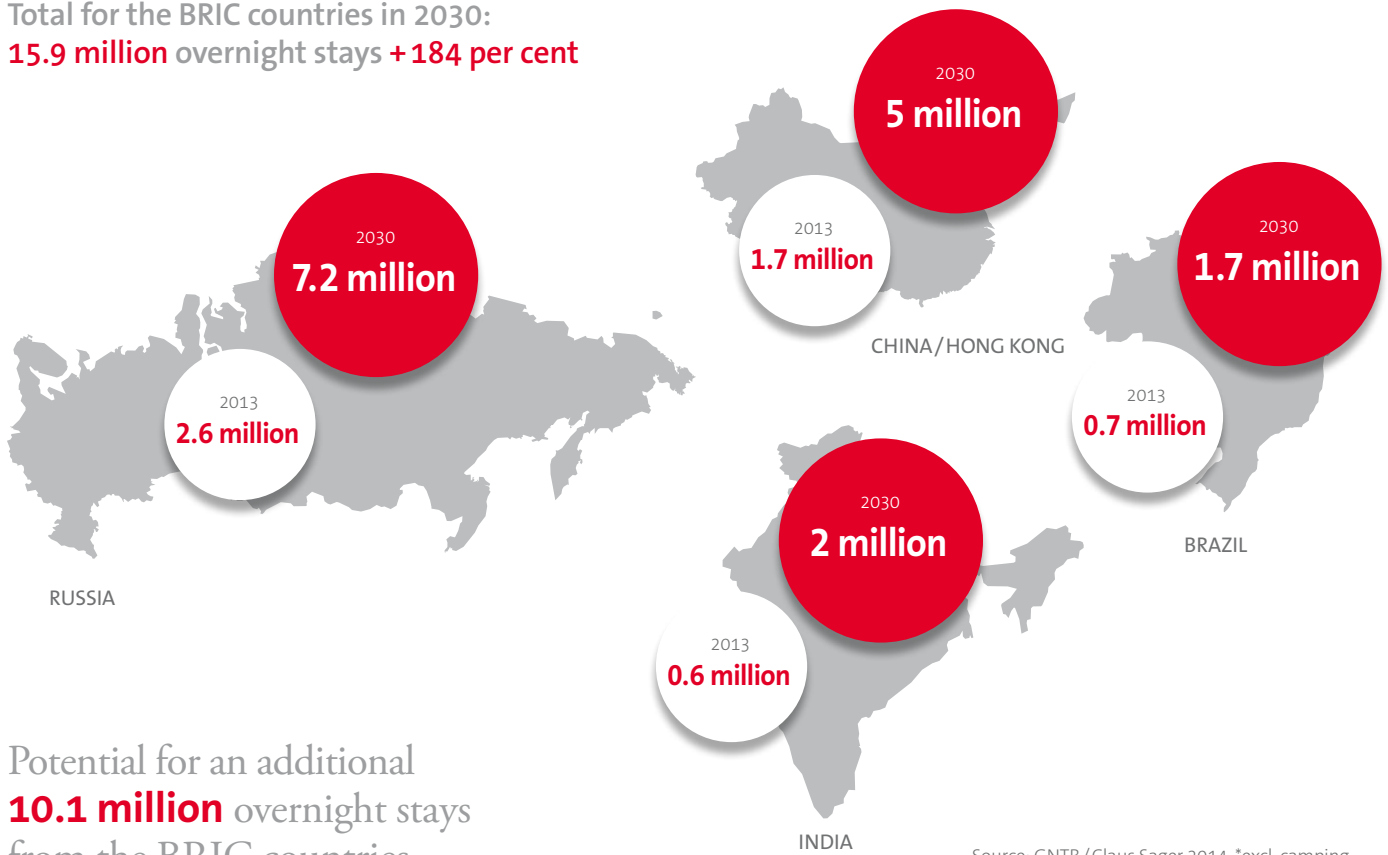
All GNTB source markets offer **potential for growth.**

- Europe will remain the **most important source region** for Germany's inbound tourism industry in 2030, with a **73 per cent** market share of all international overnight stays
- Above-average growth from overseas source markets
- **Top ten source markets in 2030:** Netherlands, Switzerland, Russia, UK, USA, Austria, China/Hong Kong, Italy, France, Poland (in descending order)



Growth from the **BRIC countries** will be above average.

Total for the BRIC countries in 2030:
15.9 million overnight stays **+184 per cent**



Potential for an additional **10.1 million** overnight stays from the BRIC countries.
 (Assuming continuing economic and political stability)

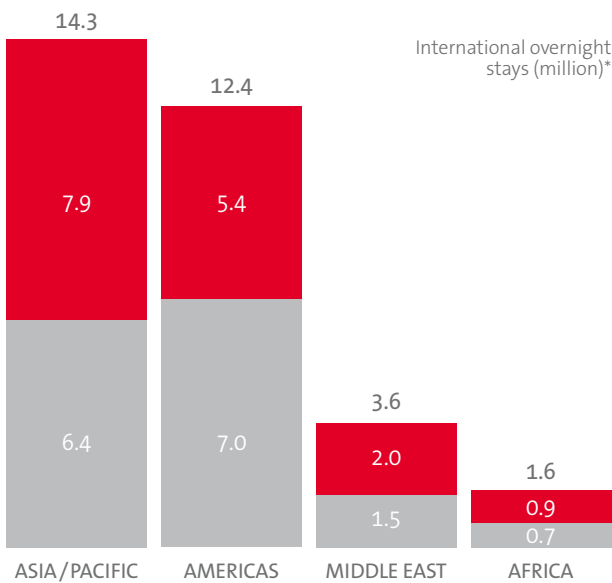
Source: GNTB / Claus Sager 2014, *excl. camping, figures are rounded.

- **Around 20 per cent** of absolute growth in international overnight stays originates from the **BRIC countries**
- China and India **triple their number of overnight stays**
- **Above-average growth potential** from **Russia**: from 2.6 to 7.2 million overnight stays in 2030
- Brazil is **strongest individual market** in South America, projected to reach 1.7 million overnight stays



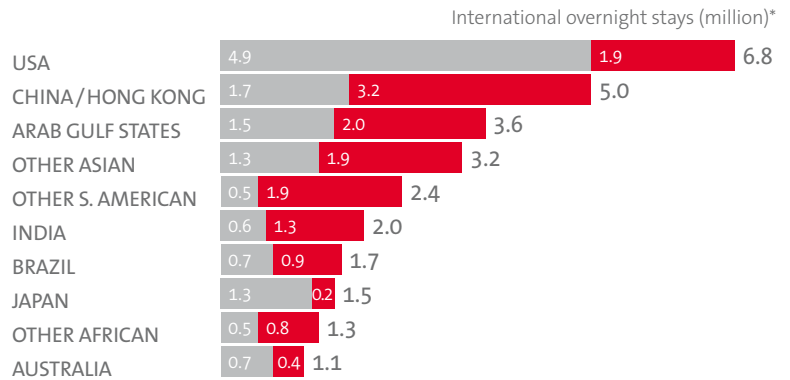
The volume of overnight stays by **overseas visitors** will more than double by 2030.

Total for overseas markets in 2030:
31.8 million overnight stays **+103 per cent**



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

Top ten overseas source markets in 2030



Source: GNTB/Claus Sager 2014, *excl. camping, figures are rounded.

■ Increase 2014 – 2030 (million) ■ 2013 (million)

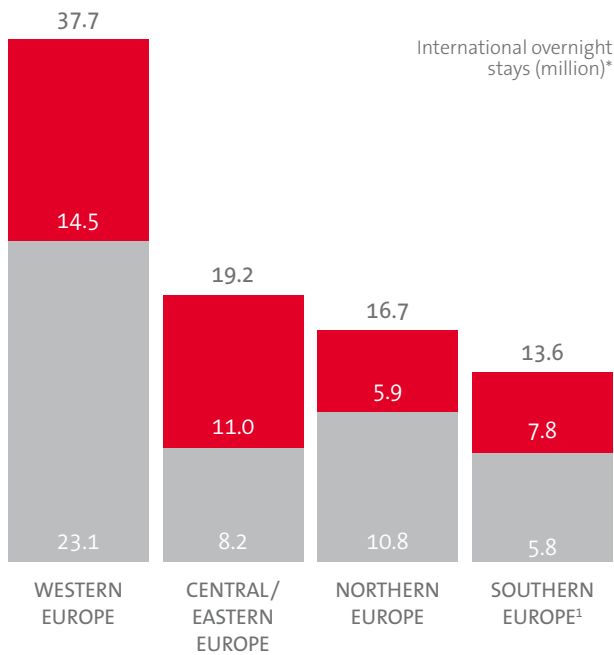
- **Asia/Pacific market** continues to grow at **rapid pace**
- **USA** will still be the **most important overseas source market** in 2030

- **China and the Arab Gulf States** show **greatest absolute growth** among overseas markets
- **South East Asian** and **other South American** markets with great potential



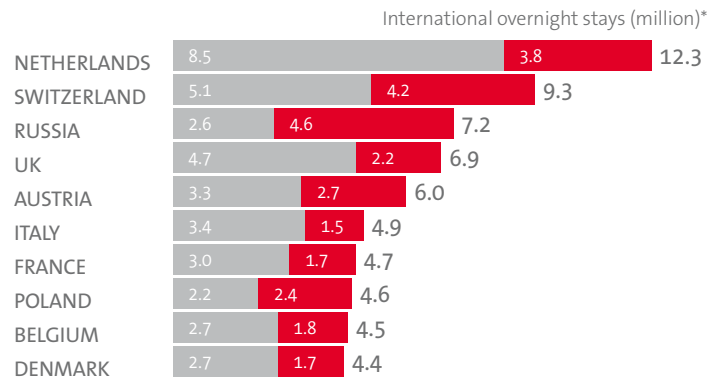
Europe remains by far the most important global source region for Germany's incoming tourism industry.

Total for European market in 2030:
88.1 million overnight stays + **74 per cent**



Source: GNTB/Claus Sager 2014, *excluding camping, ¹ incl. Israel, figures are rounded (regional classification as per UNWTO).

Top ten source markets in Europe in 2030



Source: GNTB/Claus Sager 2014, *excl. camping, figures are rounded.

■ Increase 2014 – 2030 (million) ■ 2013 (million)

- **More than two thirds of additional overnight stays** come from **western and central/eastern Europe**
- **The Netherlands and Switzerland account for more than half** of the increase in international overnight stays from western Europe

- **Half of the total volume of** overnight stays from Europe in 2030 will be generated by the markets of **the Netherlands, Switzerland, Russia, the UK, Austria, Italy and France.**



The GNTB has developed a complex, differentiated **forecasting model** based on solid analysis.

The current forecast for the period up to 2030 is focused on long-term perspectives. It takes into account various economic considerations, particularly with regard to the source markets, and has a horizon that extends well beyond current political circumstances.

Various key performance indicators (KPIs) from a number of independent sources were used to compile the forecast. An individual 'forecast key' was produced for each of the 47 source markets currently covered by the official accommodation statistics.

This makes it a valid basis for deciding on the global marketing strategy for Destination Germany.

Five (BASIC) KEY PERFORMANCE INDICATORS

	Weighting
Average increase in the number of overnight stays in Germany 1995 – 2012 <small>(source: Federal Statistical Office)</small>	33.3 %
Average increase in the number of overnight stays in Europe 2002 – 2012 <small>(source: TourMIS)</small>	16.7 %
Tourism forecasts by UNWTO for 2030 and WTTC for 2025 <small>(sources: UNWTO, WTTC)</small>	16.7 %
GNP in the source markets 1995 – 2012 and forecasts for the period up to 2020 <small>(sources: World Bank, IMF, Goldman Sachs)</small>	16.7 %
Trends in commercial air traffic in the international source markets and forecasts for the period up to 2030 <small>(sources: ACI, Boeing, DLR & World Bank)</small>	16.7 %

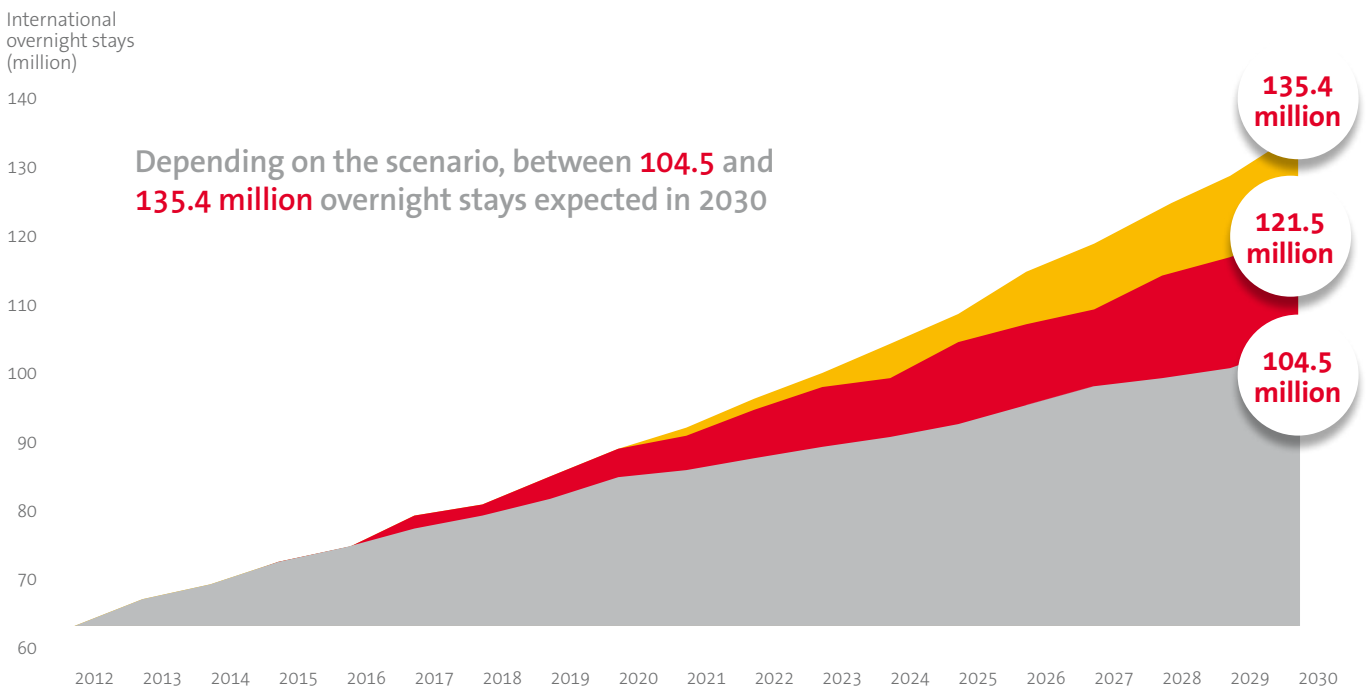
TWO (ADDITIONAL) KEY PERFORMANCE INDICATORS

Volume of travel in the international source markets <small>(sources: World Bank, IPK International)</small>	66.6 %
Demographic change 1995 – 2012 including future trends <small>(sources: IMF, World Bank)</small>	33.3 %

= BASIS FOR SOURCE MARKET FORECAST

The ‘source market forecast key’ provides the basis for three different models



LOW	AVERAGE	HIGH
Projection of linear percentage growth in source markets up to 2015 ■ 2016 – 2020: 25 % ■ 2021 – 2030: 50 %	Projection of linear percentage growth in source markets up to 2020 ■ 2021 – 2030: 25 % (UNWTO method)	Projection of linear percentage growth in source markets up to 2030



Source: GNTB/Claus Sager 2014; *excl. camping.

The GNTB’s preference, in line with the UNWTO model, is the **‘average’ scenario**. This model assumes a mix of high-growth and low-growth years and thereby avoids unrealistic expectations based on non-stop economic growth.

For more information on all markets visit: www.germany.travel/marketresearch

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