



Federal Ministry
of Economics
and Technology



General Economic Policy/Industrial Policy

German Federal Government Policy Guidelines on Tourism

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Foreword

“Travel is relaxing and enriching – it broadens horizons and brings people together from all over the world. Tourism products are like a country’s calling card. What is more, the tourism sector is a booming industry worldwide. We in Germany are also seeking to further enhance the



importance of tourism as an economic factor. At the same time, tourism is facing major challenges: Demographic change is altering the customer structure on the tourism markets, climate change is affecting the appeal of destinations and globalisation has led to fiercer competition between travel destinations around the world.

In view of these challenges, the tourism industry requires the most favourable environment to be able to flourish and needs to attract new and regular customers with modern and appealing products. The German Federal Government sees particular need for action in terms of quality, training, infrastructure and marketing in order to maintain the competitiveness of Germany as a travel destination and of German providers of tourism services. This is why, for the first time, it has issued guidelines on tourism policy.

Ernst Hinsken

A handwritten signature in black ink that reads "Ernst Hinsken". The signature is written in a cursive style.

Commissioner for Tourism of the
German Federal Government

German Federal Government Policy Guidelines on Tourism

Tourism as an economic factor

Greater efforts are needed to impress on the public, policymakers and business and industry the role of tourism as a factor for Germany's economy and its international reputation.

Tourism is a major economic factor. Alongside biotechnology, IT and health, for example, the tourist industry is seen throughout the world, and in Germany, as a motor for growth, so it plays a major role in national economies. Tourism is more than just an economic factor, though: Tourist products are a kind of calling card. They affect how people in the rest of the world see Germany and the way we view our own country.

Tourism provides local jobs and training places and enhances the recognition factor for towns and regions and with that for Germany as a location for business and industry. It also benefits a variety of allied economic sectors. Tourism is of special economic significance for the new federal states. Positive developments in tourism make a substantial contribution to the eastern German labour market, especially also in structurally weaker regions. Eastern Germany's tourist regions are, however, not well known enough and they need specific marketing strategies to give them a more distinctive profile.

The German Government is always looking to strengthen the economic capabilities of the many small, medium-sized and large-scale enterprises in the tourist industry, with the aim of raising tourist arrivals from home and abroad and increasing the number of jobs in the sector.

Directly or indirectly, almost all Germans are ambassadors of their country: Tourism starts at our own front door. We need to raise national self-esteem, to improve education and knowledge about Germany. Especially during the FIFA World Cup in 2006, Germany was able to impress visitors as a cosmopolitan, attractive and hospitable holiday destination. The German Government wants to build on this success. We also need to ensure that the National Tourist Board has the necessary resources for a vigorous marketing campaign to communicate this affirmative national image.

Framework

The framework for the tourism industry needs further improvement.

Adequate account needs to be taken of the special interests of the tourist industry in individual policy fields such as labour and social affairs, taxation, transport, environment, consumer protection, family, health, agriculture, education, culture, sports, construction and urban development, foreign affairs, development policy and security. Wherever possible, distortions of competition need to be avoided in Germany, Europe and on international markets. Businesses must be freed from superfluous bureaucracy and more attention paid to mainstreaming accessibility as a cross-sectoral task in all policy sectors.

Bilateral and international cooperation plays a major and growing role in tourism. This is why the German Federal Government is heavily engaged in promoting the interests of the tourism industry and consumers at international level. At EU level, it advocates the removal of current obstacles to the international exchange of services. Wherever possible, it presses for eliminating distortions of competition and helps to

promote the tourist industry in Europe. A seminal principle of tourism-policy activities at EU level is subsidiarity. At a multinational level outside the EU, Germany is involved in the World Tourism Organisation (UNWTO), the Organisation for Economic Cooperation and Development (OECD) and in specialist United Nations conferences that deal with issues impacting tourism policy and the tourist industry worldwide.

The German Government is committed to social responsibility in tourism, which is why its tourism policy abides by the guiding principle of sustainable development. The aim is for tourism to meet social, cultural, environmental and ethical standards and achieve commercial success at the same time. This way, it can contribute to reducing poverty, conserving biodiversity and protecting the environment and climate. In addition, the German Federal Government is also dedicated to protecting children from commercial sexual exploitation in tourism in Europe and worldwide. This is why it supports the ongoing implementation of an international code of conduct for obliging tourist enterprises to inform and instruct personnel on protective measures in outbound and inbound countries.

Sustainability

Germany stands for sustainable tourism.

In tourism, it is vital for destinations to maintain a more or less intact environment. Enjoying nature and scenery is one of people's foremost holiday motives. As a causal factor, tourism must also meet the challenge of climate change and the climate goals and policy of the German Government also apply to the whole tourist industry of course. Germany sets high standards here and the public is well aware of environmental issues. Tourists are also taking increasing note of environmental

problems and these are beginning to affect decisions on destinations. Germany will continue to position itself as a holiday destination with high environmental standards offering excellent recreational facilities.

Climate change and loss of biodiversity will change where tourists go and bring about a shift in travel patterns. Sustainability and resource conservation will also gain importance as issues in tourism. Research, innovation and strategies for adjustment and higher efficiency must provide the answers to climate change and its repercussions on biodiversity. In the long run, a sustainable tourism policy will afford competitive advantages because environmental awareness among tourists is bound to grow. This is where rural tourism can make a major contribution in particular. Nature conservation, biodiversity and expansive reserves need highlighting as competitive advantages for Germany.

Everyone involved in tourism must grasp the need to conserve nature and the environment in Germany and in all other destination countries of German tourists.

Demographic change

Tourism must take full advantage of the opportunities afforded by demographic change.

The demographic shift is changing Germany. The age pyramids in many countries throughout Europe and the world are altering. In 2035, almost half the population will be 50 or older and one person in three will be older than 60, so more elderly people will be travelling in future and fewer young people. Age is an enormous economic factor: The over-50s spend more on health and travel.

The whole tourist supply chain must respond to constantly changing customer preferences with innovative products. Growth markets in tourism are wellness and health. Older people have different consumer needs to the younger generation, but they are not a uniform group and they do not want to feel stigmatised by special 'senior-citizen offers'. Older travellers are healthier, more active and mobile than in the past, but they are also particularly experienced and demanding. They are not just inland tourists by any means. They have to be addressed in a special way. Demographic change is also a chance to bring young and old closer together, so the tourist industry needs to develop more cross-generational products. Tourism infrastructure needs adapting to harness the opportunities offered by the growth market in senior tourists: easy-to-reach destinations and the customised development of accessible transport facilities, leisure amenities, restaurants and hotels.

Population exodus and ageing are having a marked impact on the tourism potential of rural regions, especially in the new federal states. The German Federal Government will therefore continue in its efforts to support regional and local activities to help affected areas cope with the challenges of demographic change.

Quality

Germany must stand for top-quality tourism services.

Progressive globalisation is changing the demands on the tourist industry, with keener competition among destinations. The enlargement of the EU eastwards has extended the European travel market, which means new competition but also new opportunities for the German tourism industry. The same applies to travel markets, such as China, India or the Middle East.

They are competing with European products, but they – like Russia – are also generating a growing clientele with money to spend. Europe and Germany exert a very strong appeal on these new tourists and we must cater more to them.

Germany must sharpen its quality tourism profile even more in global competition among destinations. This is why it is looking to offer particularly good value for money in tourism services by European standards.

As destinations vie more for visitors, quality improvements in products and services will afford a competitive edge. Transparent standards and international quality assurance provide guidelines for clients. Quality in tourism has many sides to it. Even at today's high standards in infrastructure, catering or the hotel trade, Germany needs to keep raising quality to meet the steadily growing demands of international competition. Accessibility is also gaining importance as a quality benchmark. Germany has made strides in hospitality, service, family friendliness and flexibility in dealing with guests but there is still room for improvement. Genuine hospitality is what really makes a holiday unforgettable and persuades tourists to come back for more than one season.

Qualification

We need better qualified personnel in the tourism sector.

The growing pressure of competition in tourism places higher demands on tourism infrastructure and services and the quality of amenities. The industry also faces new challenges, such as the demographic shift. It must appeal to new, well-travelled and demanding target groups. German and international business travellers

also have higher requirements. Germany is looking to retain and extend its international lead as the preferred location for fairs, conventions and conferences.

The only way to do this is with capable and motivated personnel. We need to mobilise the large training potential in the tourist industry. Besides changes in tourist target groups, however, an ageing society is also altering the labour market for tourism occupations. Some of these are already short of junior personnel. In keeping with the large economic importance of the industry, we must raise the attractiveness of jobs in tourism.

The German Federal Government is seeking to improve skills in tourism. The syllabus in vocational schools, technical colleges and universities must be adapted to meet the strategic challenges facing the industry. In-company training and instruction must be stepped up and upgraded. The standard of professionalism in tourism services needs to be raised in step with the growing role of the industry. This also means promoting foreign language skills, a sound knowledge of the home country and broader familiarity with the cultures of major source nations for German tourism. Further training is also needed to cope with the progressive introduction of modern communication technologies in the tourist industry. Working conditions must be made more attractive. The role of tourism as an economic factor is growing, so more prestige must be attached to the skills and abilities of the people working in it.

Destination Germany

Germany needs better destination branding.

As a brand destination, Germany offers a great variety of amenities for tourists. Its special strengths include the segments cultural and city trips, business journeys and recreational tourism. Germany operates an ultra-modern transport system whose high quality also needs maintaining to keep up with keener competition in tourism. Key elements here are a well-developed transport infrastructure, capable operators and their efficient networking to ensure the – barrier-free – accessibility of destinations.

We need to sharpen our perception of Germany as a brand name in tourism. It likes playing host. ‘Destination Germany’ and its capacity for innovation need permanent reappraisal and development. Developing and modernising infrastructure is the way to make sure that tourist destinations are easy to reach. We need to grasp that accessibility is part of hospitality. Tourists must feel welcome and at ease: We must give them an even friendlier reception, provide them with more and better services, we must appeal to them and attend to their needs. Germany wants to remain a cosmopolitan and tolerant country, so it must be adamant in opposing any animosity towards foreigners. Appropriate improvements need to be made in infrastructure to capitalise on the trend towards health and wellness tourism and biking and hiking holidays. Tourism also affords development prospects for rural areas.

Participation

Germany wants to involve everyone in tourism.

The German Federal Government aims at ensuring that all sections of the population participate in tourism. People with physical disabilities or social and financial disadvantages must also be able to travel. This is why assistance is given to providing reasonably priced holiday accommodation while avoiding distortions of competition.

To enable everyone to avail themselves of tourist products and services, the ideal of barrier-free travel needs to be mainstreamed in the whole tourist supply chain. Access to railway stations, airports, means of transport and to cultural and leisure facilities, restaurants and hotels must be barrier-free. This will not just benefit disabled people, families with small children or older people in particular. Accessibility means respect for all.

Cooperation

Cooperation needs to be improved between tourism policymakers and the industry.

Tourism policy in Germany is also organised along federal lines. The prime task of the German Government is to set out and improve the framework for tourism policy in keeping with the goals of financial consolidation. Planning, developing and directly promoting tourism is, however, the job of the federal states. Most tourism organisations are divided up into small units. The German tourist industry is largely made up of small and medium-sized enterprises. At the same time, Germany must develop and market destinations in global competition. The German

Government and German institutions abroad support these efforts in various ways.

There must be a greater shared awareness of the need to cooperate in a major global growth industry and contribute to developing and communicating Germany as a holiday destination at home and abroad. Cooperation ought to be stepped up between the German National Tourist Board and German representatives abroad. The German Federal Government appeals to business and industry, the scientific community, the federal states, regions and municipalities to take account of the growing role of tourism and to engage in closer dialogue on the great opportunities and challenges entailed. The Guidelines of the German Federal Government are not about imposing targets. The intention is to give an impetus to closer communication and cooperation between policymakers and business at all levels. The idea is not to exclude anyone but to get everyone to collaborate. We can only get better together.

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