

Łukasz Wiśniewski^{1,a}, Agata Spręga^{1,b}

¹ Faculty of Earth Sciences and Spatial Management, Nicolaus Copernicus University in Toruń, Poland

ORCID: ^a<https://orcid.org/0000-0001-9504-074X>, ^b<https://orcid.org/0009-0006-9038-562X>

Corresponding author: Łukasz Wiśniewski, email: lukaszwisniewski@umk.pl

Tourism in Germany, with particular emphasis on Bavaria. Current status and prospects for development

Abstract: Tourism is one of the most important economic sectors in the world, and is constantly developing. It is of great importance to strongly developing countries, including Germany, which has been recording high tourist traffic for years. The research objective was to analyse the current state, trends and prospects for development of tourism in Germany, with particular emphasis on Bavaria. Attention was focused on the most important attractions in Germany, tourist development and consequently on the intensification of tourist traffic. The aim of the work was also to identify and explain the spatial and socio-economic determinants of tourism development in Bavaria, as well as to assess future development prospects in the context of emerging trends. The desk research method and the statistical index method were used. Documents regarding tourism policy, statistical studies and academic literature on the subject were reviewed. Sources from the most important organisations in the tourism industry were also used. The study indicates the high importance of tourism in the German economy. Tourist traffic volumes are returning to pre-COVID-19 levels, making Germany one of the most popular destinations in the world. The analysis allows us to confirm that the region of Germany most frequently visited by foreign tourists is Bavaria, which is characterised by a high level of socio-economic development. There are clear spatial differences in the intensity of tourist traffic in Bavaria, with the differences being greatest in the south-east.

Keywords: tourism, Germany, Bavaria, tourist traffic

1. Introduction

Tourism is one of the most important economic sectors in the world. Increased international cooperation, technological progress and dynamic economic development result in increased tourist traffic. Since the beginning of the 21st century, the number of international tourist arrivals globally has increased significantly – from 680 million in 2000 to 1.464 million in 2019 (<https://www.statista.com/statistics/209334/total-number-of-international-tourist-arrivals/>). This upward trend was halted in 2020 by the response to the COVID-19 pandemic, including the introduction of severe travel restrictions. Despite the crisis that affected the tourism industry, the situation in many countries is gradually returning to the pre-pandemic state, tourism is recording a

significant recovery, and the number of foreign tourists is increasing dynamically, having increased by approximately 568 million in two years (<https://www.unwto.org/>). According to data published by the World Travel and Tourism Council, in 2023 the travel and tourism sector contributed 9.1% to global GDP, an increase of 23.2% compared to the 2022 figure and only 4.1% below its level for 2019 (<https://wtcc.org/research/economic-impact>). Increased tourist activity caused by increased free time, wealth and societal awareness have also brought greater revenues for international tourism. According to the World Tourism Organization, in 2022 revenues amounted to USD 1.507 billion (<https://www.untourism.int/tourism-data/un-tourism-tourism-dashboard>), meaning the

tourism sector can be considered one of the most profitable in the global economy. Tourism is at the centre of attention of highly developing countries (including Germany), which base their policy on sustainable development strategies. Every year, Germany is high in the rankings of the world's most visited countries. Tourism is an important branch of the German economy. In 2023, it generated 11% of GDP (<https://www.statista.com/statistics/1228395/travel-and-tourism-share-of-gdp-in-the-eu-by-country/>), but it is worth remembering that the German economy is the largest in Europe and third largest in the world, having overtaken Japan in 2023 (<https://businessinsider.com.pl/gospodarka/najwieksze-gospodarki-swiata-zmiana-napodium-japonia-ma-problem/wfnfzr>). Currently, with a GDP value of over USD 4.456 billion (https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=DE&most_recent_value_desc=true), it is on the podium of the world's largest economic forces, after the United States and China.

A particularly prominent position within the German tourism system is occupied by Bavaria, the largest federal state by area and one of the most socio-economically advanced regions in Europe. In 2022 Bavaria recorded over 34 million tourist arrivals and more than 92 million overnight stays, accounting for 20.5% of all such stays in Germany (Bayern Tourismus Marketing GmbH, 2023). Bavaria's diverse tourism offer, which included UNESCO World Heritage Sites, Alpine landscapes and significant cultural cities such as Bamberg and Würzburg, contributes to its leading role in both domestic and international tourism flows. The region also exhibits a high degree of tourism intensity, particularly in its southern districts (https://ec.europa.eu/commission/presscorner/detail/en/ip_21_304; Bayern Tourismus Marketing GmbH, 2023).

While many studies have examined overall global and country-specific tourism trends and

provided recommendations for increasing regional competitiveness (e.g. Dwyer et al., 2009; Wanner et al., 2020; Volgger et al., 2021; The United Nations World Tourism Organization, The Organization for Economic Co-operation and Development), fewer have offered a detailed and region-specific analysis of the spatial structure and dynamics of tourism development in Germany, especially in Bavaria. Previous research has often focused either on macroeconomic indicators or sustainability policies at the national level without sufficient attention to regional disparities or infrastructure capacity. This research attempts to bridge that gap by combining statistical-spatial analysis with contextual assessment of development scenarios, thereby offering a more comprehensive understanding of Bavaria's position within both national and European tourism systems.

The aim of the work was to analyse the spatial structure, dynamics and socio-economic determinants of tourism development in Germany, with a particular focus on Bavaria, being the most important state in terms of tourism revenues. To achieve this goal the following research questions were posed:

- What are the main spatial patterns and socio-economic factors influencing tourism development in Germany and Bavaria?
- How does Bavaria compare to other German states in terms of tourist traffic intensity and attractiveness?
- How do current trends and development scenarios reflect the resilience and adaptability of Bavaria's tourism sector?

Due to the breadth of the issue, only selected issues were included in the study, namely: the most important attractions, tourist development and traffic, and spatial aspects of the studied phenomena.

2. Data and Methods

To prepare the study, no-reactive research was used – the content analysis method, which used secondary data from subject literature (Bednarowska, 2015; Nalaskowski and Dejna, 2020). Sources from the most important (Czyż, 2015) was also used (results presented using bar and pie charts) and the method of observation of participants during stays in Germany in 2023. This study combines qualitative and quantitative analyses. In the German context, studies by Karl and Ranné (2001), Wanner et al. (2020), Schmude et al.

organisations in the industry were used, such as: The United Nations World Tourism Organization (UNWTO), the World Travel and Tourism Council (WTTC), the World Bank (WB). The indicator method (2021) have provided important insights into regional tourism policies, infrastructure and tourist behavior. This paper builds on these foundations by applying spatial-economic analysis and tourism intensity metrics to better understand regional disparities and tourism potential, especially in Bavaria.

3. Tourism in Germany: selected features for assessment

3.1. Tourist traffic

Germany is one of the most popular tourist destinations in the world. This is evidenced by the World Tourism Organization rankings, in which Germany regularly places in the top ten for most visited countries (see Fig. 1) (UNWTO, 2023), and, consequently, for revenues generated from foreign tourism.

This is due to broadly understood tourist attractiveness, which includes the presence of the Alps, access to the North and Baltic Seas, the central location in Europe and countless cultural attractions bearing witness to a rich

history. The tourist potential is complemented by a very well-developed road, railway and air infrastructure. According to the 2024 World Competitiveness Ranking, Germany placed 20th¹ in the world in terms of infrastructure quality (<https://www.imd.org/centers/wcc/world-competitiveness-center/rankings/world-competitiveness-ranking/rankings/wcr-rankings/>). The country has the second longest motorway network in Europe and well-developed high-speed rail systems (ICE).

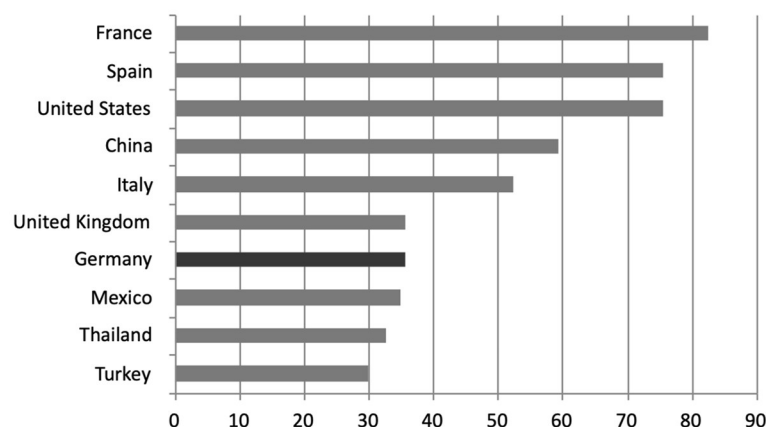


Figure 1. Most visited countries in 2023 and the number of arrivals in millions. Source: World Tourism Barometer 2023

¹ Ninth place in 2022.

Analysing changes in the number of tourists, since 2012 there has been an upward trend in the number of foreign tourists traveling to Germany (Fig. 2), which in 2019 reached 39.56 million² (<https://data.worldbank.org/indicator/st.int.arvl?locations=DE>; <https://www.e-unwto.org/doi/epdf/10.5555/unwtotfb0280010020182022202310>).

As a result of the pandemic, this fell to 12.45 million in 2020 and 11.69 million in 2021, followed by an increase in arrivals of non-residents. A strong upward trend is now again being observed. This demonstrates the resilience of the German tourism sector, even in the face of global crises, and its high ability to adapt to change.

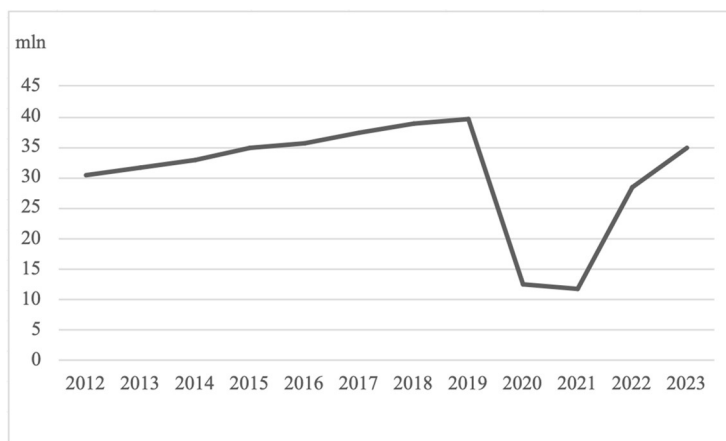


Figure 2. Changes in number of foreign tourists in Germany in 2012–2023. Source: <https://data.worldbank.org/indicator/st.int.arvl?locations=DE>; <https://www.e-unwto.org/doi/epdf/10.5555/unwtotfb0280010020182022202310>

In 2022, Germany recorded 28.46 million tourists, of which 23.04 million travelers from Europe (81% of all foreign tourists traveling to Germany), 3.05 million from North and South America (11%), and 1.20 million from East Asia and the Pacific (4%) (Fig. 3) (<https://www.e-unwto.org/>). The remaining 1.17 million came from other regions of the world. The structure of tourists visiting Germany was dominated by visitors from the

Netherlands (10.3 mln), Switzerland (5.8 mln), the United States (5.4 mln), Austria (3.6 mln) and Poland (3.6 mln) (Fig. 4) (<https://www.statista.com/>). The structure of tourists visiting Germany means that geographical proximity and good transport connections are key to tourism flows. Neighboring countries play a major role in shaping Germany's tourism market.

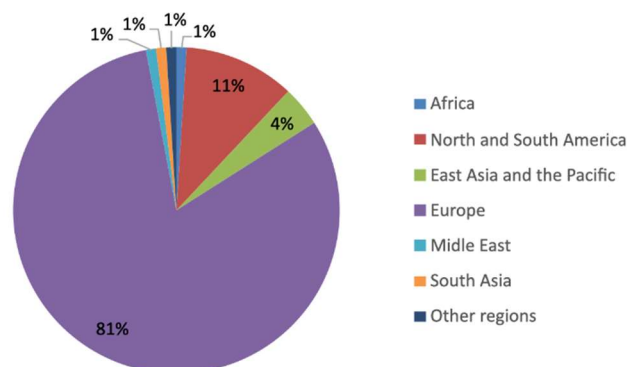


Figure 3. Structure of tourists visiting Germany by regions of the world. Source: www.e-unwto.org/doi/epdf/10.5555/unwtotfb0280010020182022202310

² For comparison, in Poland in 2019 there were 21.2 million tourists (Statistics Poland).

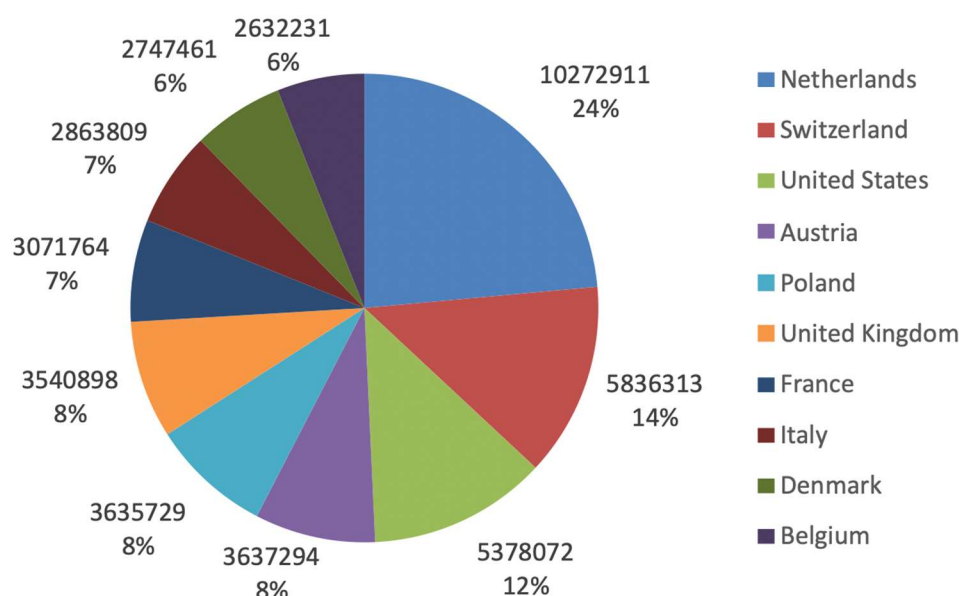


Figure 4. Structure of tourists visiting Germany by countries of the world. Source: www.statista.com/statistics/563988/tourists-country-of-origin-germany/

Germany consists of 16 federal states that are characterised by a large diversity of tourist attractiveness and related tourist traffic intensity (Fig. 5) (<https://www.statista.com/statistics/569485/arrivals-accommodation-international-tourists-germany-state/>). Bavaria is the most frequently visited tourist region in Germany. In 2022, 34.21 million tourists visited (of which, over 7 million from abroad). It confirms Bavaria's leading role in German tourism. Bavaria is

attractive for its rich cultural heritage, medieval urban centres and picturesque upland and mountain landscapes. Other popular holiday regions in Germany are North Rhine-Westphalia and Baden-Württemberg, which welcomed 20.32 million and 20.16 million tourists, respectively, in 2022. These statistics allow us to consider the development of tourism in Germany as uneven and spatially differentiated, with several dominant regions.

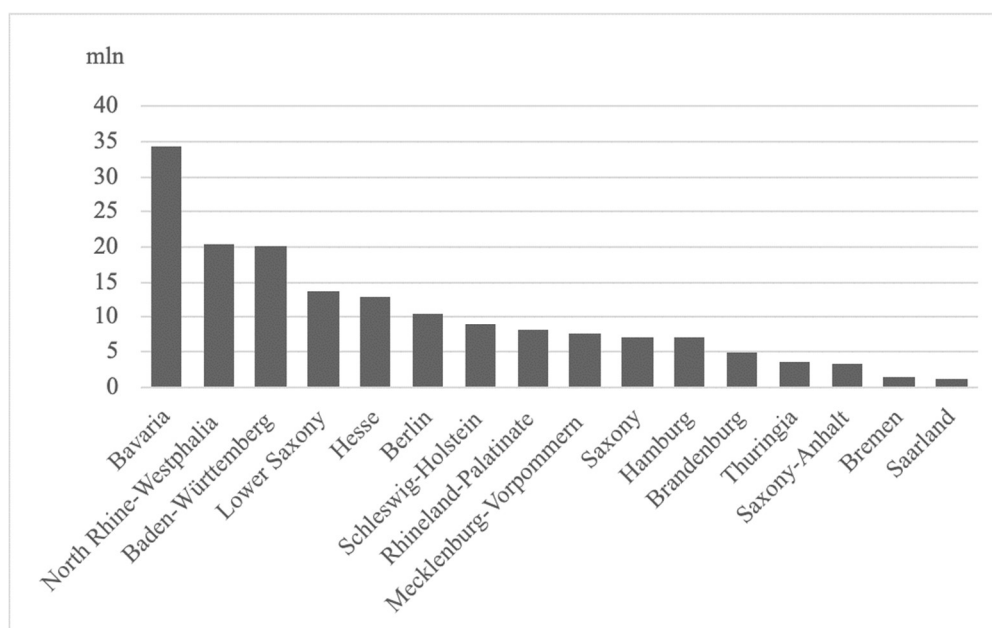


Figure 5. Number of tourists by German state, 2022. Source: <https://www.statista.com/statistics/569485/arrivalsaccommodation-international-tourists-germany-state/>

The capital of the country, Berlin, has for years led as the most frequently chosen travel destination in Germany, and the number of tourists in 2022 amounted to 10.4 million (<https://www.statista.com/statistics/561090/most-popular-city-destinations-germany/>). It is a city full of contrasts and various attractions – monumental buildings, historical monuments, numerous art galleries and entertainment facilities. Munich is the second most visited city in Germany, with 6.9 million non-residents arriving here in 2022. In 2018, it was chosen by the British magazine *Monocle* as the most liveable city in the world (<https://www.deutschland.de/pl/topic/kultura/dlaczego-monachium-jest-najbardziej-przyjaznym-do-zycia-miastem-na-swiecie>). The next places were taken by: Hamburg with 6.8 million non-residents, Frankfurt am Main with 4.7 million and Cologne with 3.2 million. The role of cities in German tourism is emphasised by recent analyses conducted by

the German Tourism Office (DZT), which showed that Germany is the leading travel destination for Europeans wanting to see cities and participate in cultural entertainment (<https://turystyka.rp.pl/nowe-trendy/art-39750801-niemiecka-centrala-turystyki-turystow-ciagnie-do-naszych-miast-wykorzystamy-to>).

This volume of tourist traffic requires a large and diverse accommodation base. In 2021, almost 50,000 accommodation facilities operated in Germany, offering nearly 3.5 million places. This is the fourth highest figure in the European Union after Italy, France (5.1 million beds each) and Spain (3.8 million). For example, in Poland there were almost 10,000 facilities offering 0.78 million places, so the accommodation base in Germany was about five times larger (CSO, 2023).

3.2. Top attractions

Germany is a country with high tourist attractiveness due to the presence of features of high natural and cultural value. It has 52 objects inscribed on the UNESCO World Heritage List, which puts it (together with France) in third place in the world in this respect (Italy has 59 objects, and China 57) (<https://whc.unesco.org/>). These include numerous churches, cathedrals, palaces and castles, parks, prehistoric settlements and objects of industrial heritage. It is difficult to choose the most important attractions in

1) The Cathedral of St Peter and the Blessed Virgin Mary in Cologne
The most visited building in Germany is the **Cathedral of St Peter and the Blessed Virgin Mary in Cologne**, which was visited by over 4.3 million people in 2022. With a height of approximately 157 meters, it is the third largest church in the world – after the Cathedral of the Blessed Virgin Mary in Ulm and the Basilica of Our Lady Queen of Peace in Yamoussoukro. The construction of the temple in Cologne, which is considered a masterpiece

Germany due to their diversity and unique features, which is why there are many rankings emphasising the uniqueness of various objects. One of the most reliable lists was published by the German broadcasting station Deutsche Welle (Fig. 6) (<https://www.dw.com/>), which took into account visitor numbers in 2022 to rank the most popular tourist attractions in Germany. The objects on the list attract tourists from all over the world, and are also often chosen by German residents themselves when traveling around the country.

of Gothic art, took, with interruptions, more than 600 years. For its value, and its testimony to the Christian strength and faith that prevailed in Europe for centuries, it was inscribed on the UNESCO World Heritage List in 1996. The most valuable monument of the cathedral is the reliquary of the Three Kings, which is part of the main altar, which, according to tradition, houses the relics of the Three Kings – the patron saints of Cologne.

2) The Elbphilharmonie in Hamburg
An attraction that has enjoyed unwavering interest among Germans and foreign tourists since its inception is the **Elbphilharmonie in Hamburg**. The building was located on the site of a former imperial granary and a port

warehouse for coffee, cocoa and tobacco. The philharmonic building, designed by the famous Swiss studio Herzog & de Meuron, is distinguished by its extraordinary architecture, and from its viewing platform one can admire the panorama of the city and the port of



Figure 6. Germany's most visited attractions in 2022. Source: own work based on www.dw.com/en/germanys-10-most-visited-attractions/g-65001385

Hamburg. The Elbphilharmonie consists of three concert halls, a hotel, 45 private apartments and the longest escalator in Western Europe, at 80 m long. In 2022, the Elbphilharmonie was visited by 2.8 million people.

3) The Museum Island in Berlin
Germany's most popular destinations also include the **Museum Island in Berlin** with 2.2 million visitors in 2022. The complex includes five world-class facilities, including the Bode Museum, the Pergamon Museum, the New Museum, the Old National Gallery and the Old Museum. The most valuable exhibits are the Bust of Nefertiti, wife of Pharaoh Akhenaten, dated to 1345 BC, the reconstructed

Babylonian Ishtar Gate and the Great Altar of Zeus from Pergamon. The high urban and architectural level of Museum Island in Berlin is emphasised by its inclusion on the UNESCO World Heritage List in 1999.

4) The Topography of Terror Documentation Centre in Berlin

The Topography of Terror Documentation Centre located in Berlin also attracted a large number of visitors (2 million). It was built in the place where the headquarters of the Gestapo and SS were located in the years 1933–45. Currently, there is a library with a rich collection of books, an archive, numerous photographs and maps, and copies of documents, as well as models showing Berlin

during World War II. The Topography of Terror Documentation Centre is an important place of remembrance of events and people who were part of a tragic part of history.

5) **The Zeche Zollverein Industrial Complex in Essen**

An important point on many itineraries is the **Zeche Zollverein Industrial Complex in Essen**, inscribed on the UNESCO World Heritage List in 2001. This monument is an outstanding example of the history of 20th century industrial technology and architecture, and presents a key phase of traditional European heavy industry. As a complex of high historical importance and tourist potential, it is one of the greatest attractions of the European Industrial Heritage Route. In 2022, approximately 1.6 million people visited it.

6) **The Humboldt Forum in Berlin**

The Humboldt Forum opened in 2021 and has since been very popular, with 1.5 million visitors in 2022. The museum is located in the City Castle building in the historic centre of Berlin and is a symbol of German openness to the world. Despite the reconstructed baroque façade, the facility focuses on modernity, boasting a diverse programme of exhibitions, events, cultural education and digital offerings. The Humboldt Forum presents the rich history of Berlin, as well as exhibits from all over the world, the most famous of which are a historic boat from the island of Luf and bronzes from Benin.

7) **The Miniatur Wunderland in Hamburg**

The Miniatur Wunderland in Hamburg attracts crowds of visitors every year. There is the world's longest model railway – the length of the tracks on a scale of 1:87 exceeds 15 km, and it features approximately 1.000 trains. The entire exhibition is divided into nine thematic sections: America, Austria and the Alps, Hamburg, Knuffingen, Knuffingen Airport with the world's largest miniature airport simulation, Scandinavia, Switzerland, Central Germany and the Harz, as well as Italy with the Colosseum, Vesuvius and the Vatican. The

works have been going on since December 2000, and the facility is constantly being expanded. One of the biggest attractions is a huge stadium where a concert is being presented. Once hears music from the speakers, lights flash in the stands, and the concert is being shown live on large screens. Picturesque mountain and lowland landscapes, towns full of tourists and residents engaged in various activities, shops, stations, entertainment facilities and houses have also been meticulously recreated.

8) **The Evangelical Lutheran Church of St Michael in Hamburg**

The next important monument in Germany is the **Evangelical Lutheran Church of St Michael in Hamburg**. Its tower topped with a clock and a dome supported by columns was the first recognisable symbol of the city and a landmark for ships arriving at the port. Above the main portal of this Baroque temple is a bronze statue of the patron saint – St Michael the Archangel – fighting Satan. The greatest treasures of the church are four organs, the neo-Baroque main altar with a painting of the Risen Christ and the Art Nouveau stained glass window of a sailing ship.

9) **The Deutsches Museum in Munich**

The Deutsches Museum in Munich (German Museum) is one of the oldest and largest science and technology museums in the world. The attraction of the facility lies not only in its more than 28.000 exhibits, but also in the interactive learning it offers in the form of shows and experiments that visitors can participate in. The Deutsches Museum also houses the world's largest library of technical literature.

10) **The Frauenkirche in Dresden**

The final place in the ranking of the most popular tourist attractions in Germany published by Deutsche Welle is occupied by the **Frauenkirche in Dresden**, the Church of the Blessed Virgin Mary. This Lutheran temple was destroyed during World War II and reconstructed over four decades later thanks to financial donations, and today it is a symbol of

hope, reconciliation and rebirth. The altar combined with an organ and enriched with

gold features attracts special attention.

4. The case study of Bavaria

4.1. Socio-economic situation and its origins

Bavaria is the largest state in Germany by area and second by population. It consists of seven regions (Lower Franconia, Upper Franconia, Middle Franconia, Swabia, Upper Palatinate, Upper Bavaria, Lower Bavaria), and at the lower level of administrative division it is divided into 71 counties and 25 towns with county rights.

The state is also at the forefront of economic and social GDP statistics (second place in Germany) and quality of life measured by the HDI index (fifth place; in the years 1995–2015, the improvement in the quality of life measured by the HDI index was the highest) (https://en.wikipedia.org/wiki/List_of_German_states_by_Human_Development_Index).

This indicates that Bavaria is one of the best places to live in Europe. This success has been influenced by a combination of various factors:

- political (since 1957, one party has been in power: the Christian Social Union in Bavaria (CSU) (Frymark, 2019),

- demographic (population potential, population inflow),
- historical (funds under the Marshall Plan; forced “relocations” of companies from East Germany),
- economic (in addition to the basic automotive industry (BMW, Audi, MAN), focus was placed on the development of the electronics industry, e.g. Siemens) (Godlewski, 2016),
- natural (diverse areas, including potential for tourism development).

It should be noted that the “post-war economic miracle” affected most of the Federal Republic of Germany (Kaliński, 2008), but it was Bavaria that developed fastest and is constantly increasing ³, while the unemployment level, at 3.1%, was by far the lowest in the entire country (AHK Poland, 2023).

4.2. Status and diversity of tourism (selected elements)

The cultural diversity of Bavaria is well reflected in the northern areas of the state – more precisely, in the areas of Franconia (three regions). This region boasts, among other things: the historic old town in Bamberg and one of the most outstanding monuments of baroque architecture in Europe – the Episcopal Residence in Würzburg (both included on the UNESCO list) (see photo 1).

Würzburg and the surrounding area are also famous for their rich culinary offer (Orłowski and Woźniczko, 2016). This university town is famous for wine production (Juliusspital) and brewing (Würzburger Hofbräu). In this

context, special attention can be drawn to the custom of residents who, on weekends, sit on the Alte Mainbrücke bridge, grape drink in hand, creating the place’s particular atmosphere.

Bavaria is the undeniable leader in tourism industry development. This is evidenced by the fact that last year it was visited by over 34 million tourists, spending over 92 million overnight stays (20.5% of all overnight stays in the country; second place was Baden-Württemberg at 11.6%) (Bayern Tourismus Marketing GmbH, 2023).

³ Hamburg – 5,209, Baden-Württemberg – 4,815



Photo 1. Residence in Würzburg. Source: own collection

In Bavaria, hotel companies employ 475.000 persons and sell services worth almost EUR 21 billion. The size of the accommodation base is over 553.000 beds, with almost 45% located in hotels and another 12% in “garni” hotels. Farm holidays are offered by approximately 4,000 farms with approximately 50,000 places. In addition, 485 registered campsites are available (38.000 places).

The official organisation responsible for promoting Bavaria as a tourist destination is Bayern Tourismus Marketing GmbH (BayTM) (<https://tourismus.bayern>). It strives to improve Bavaria's image at home and abroad through appropriate management and continuous development of the Bavarian tourism industry. BayTM holds various tourism events, publishes magazines, articles and information materials, and conducts marketing activities via its own website (<https://tourismus.bayern>). An important role

The intensity of tourist traffic varies greatly spatially. Selected indicators are presented in Figure 7-10 (<https://tourismus.bayern/wissensmanagement/statistiken-und-studien/>). Generally speaking, there is a visible division into the more touristic south-east and the slightly less touristic north-central part. The highest values of the analysed indicators are recorded in southern areas of Bavaria – more precisely, in the regions of Lower Bavaria and Swabia. The former areas include,

in the development of tourism in Germany, including Bavaria, is played by the German Tourism Office (DZT), which in 2024 won the award for innovation for the fourth time in a row (<https://www.waszturystyka.pl/niemiecka-centrala-turystyki-uhonorowana-po-raz-czwarty-w-konkursie-top-100-innowacji/>). The office represents the country at international fairs and holds the largest and most important event dedicated to incoming tourism to Germany – GTM Germany Travel Mart – which focuses on meeting and establishing cooperation with German tourism entrepreneurs. Bayerischer Wald-Verein also works to promote Bavaria (<http://bayerischer-wald-verein.de/der-verein>). The organisation focuses on protecting objects of value and promoting the Bavarian Forest as a tourist area, conserving and maintaining tourist trails, and protecting cultural and natural heritage.

among others, the highest part of the German Alps (with the highest peak, Zugspitze), and the capital, Munich, also recorded the highest number of overnight stays in the entire state. It is worth adding that Upper Bavaria is the third most innovative region in Europe (after Stockholm and Helsinki) (https://ec.europa.eu/commission/presscorner/detail/en/ip_21_3048) and is often called the “silicon valley of Europe”.

The presented data show significant internal differences in tourist activity within the state, confirming the research assumption regarding spatial disparities. The above figures indicate that Bavaria's attractiveness is not evenly distributed, depending on various factors, such as the level of development of tourism

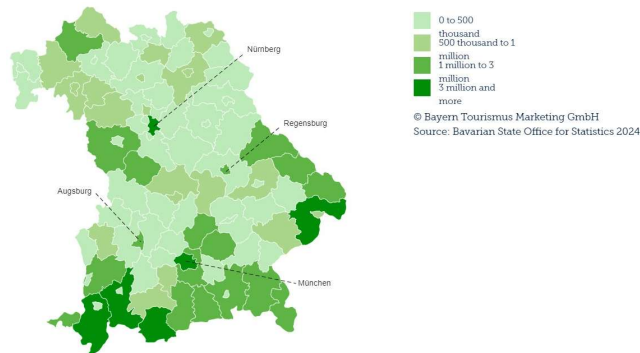


Fig. 7. Overnight stays by district in Bavaria 2023. Source: <https://tourismus.bayern/wissensmanagement/statistiken-und-studien>

infrastructure, including hotels, the condition and accessibility of transportation (e.g. access to airports), and the location and importance of attractions. Regional promotion based on regional development plans and strategies is also important.

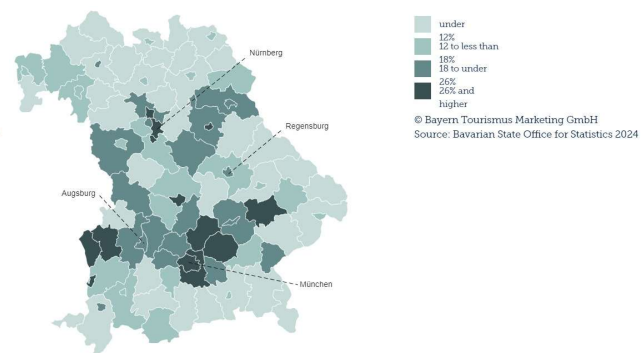


Fig. 8. International overnight stay share by district in Bavaria 2023. Source: <https://tourismus.bayern/wissensmanagement/statistiken-und-studien/>

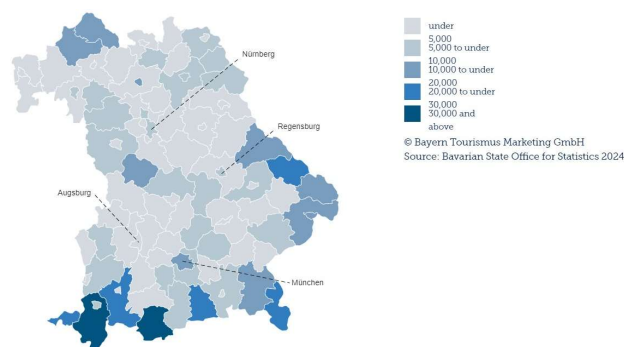


Fig. 9. Tourism intensity (overnight stays per 1,000 inhabitants) by district in Bavaria 2023. Source: <https://tourismus.bayern/wissensmanagement/statistiken-und-studien/>

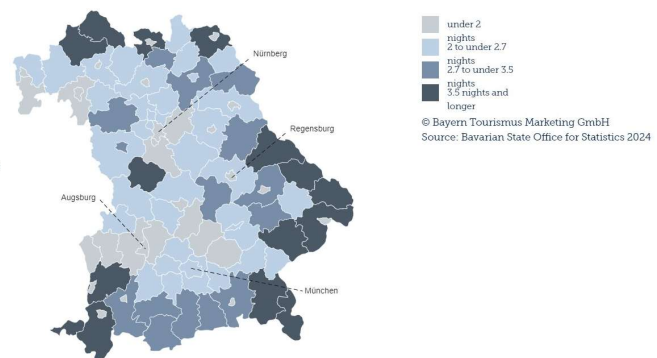


Fig. 10. Average length of stay by district in Bavaria 2023. Source: <https://tourismus.bayern/wissensmanagement/statistiken-und-studien/>

4.3. Development scenarios

Maintaining the success and continuous development of the tourism industry requires well-thought-out strategic actions. In 2021, a team led by A. Bauer (et al., 2021) developed scenarios for the development of tourism in Bavaria. The cited document distinguishes seven possible directions of development:

1. Internal loss of control – unsustainable growth leads to “Overtourism” in hotspots.
2. Everything flows – Bavarian identity and sustainable offerings attract tourists.

3. Digital DIRDNL – tradition must learn to walk, and digitalisation meets customs.
4. New Compatibility – Climate change will force tourism to adopt completely new approaches.
5. Algorithm power – artificial intelligence changes traditional value chains.
6. Domestic sales – the industry is dominated by global tourism companies that ignore tradition and sustainability.

7. Tourism at the end? – tourism at a crossroads between resilience and susceptibility to threats.

The proposed scenarios are a response to observed megatrends affecting tourism, such as: demographic changes, mobility, digitalisation and sustainable development. They also take into account lessons from crises

of the past (9/11 terrorist attacks, financial crisis) and present (pandemic, climate change) that have impacted the tourism industry on a global scale. The goal outlined in the document is to protect Bavaria from losing its importance as a tourist centre.

5. Summary

Tourism is a dynamically developing economic sector that sometimes constitutes a decisive source of state revenues. The aim of the article was to identify and explain the spatial and socio-economic determinants of tourism development in Bavaria, as well as to assess future development prospects in the context of emerging trends, analyse the spatial structure, dynamics and socio-economic determinants of tourism development in Germany, paying particular attention to Bavaria. It has been established that the volume of tourist traffic is returning to pre-COVID-19 pandemic levels and Germany is still a top travel destination for foreign tourists. Despite the economic “shortness of breath” indicated in many publications and a visible decline in certain rankings of, for example, economic competitiveness, it should be assumed that the country will continue to derive significant benefits from tourism. German tourists are also important in world tourism, generating a significant share in global tourist traffic.

The most important region of German tourism is Bavaria. With its rich cultural heritage and natural potential, it attracts the largest number of tourists (including foreign ones), and the most popular attractions are the Deutches Museum in Munich and the Bavarian Forest national park (the oldest in Germany). Its domination of tourist traffic volume will be facilitated by Bavaria's increasingly stronger role in the national economic system. The above-mentioned scenarios for the development of tourism in Bavaria indicate that state authorities must be prepared to meet

the challenges of tourist pressure, digitalisation and artificial intelligence, the domination of global enterprises, and climate change.

These findings also show that tourism in Bavaria is being influenced more and more by global trends such as climate change and digital technologies. This is in line with the development scenarios proposed by Bauer et al. (2021). What makes this study valuable is that it combines data on tourism numbers with future-oriented thinking, helping to better understand how tourism in Bavaria might change in the coming years.

The study shows that tourism is a key part of Germany's economy, and Bavaria is the leading region in terms of tourist numbers, investment and infrastructure. It was examined how tourism is spread across different parts of Bavaria and found differences that southern areas attract far more tourists than the north. These differences are strongly linked to factors like accessibility, natural heritage and the presence of large cities. By using both statistical data and future development scenarios, we provided a deeper picture of how tourism in Bavaria works and how it might evolve. The topic is important because tourism brings major benefits but also creates challenges. The results help fill a gap in the research by showing how one region – Bavaria – fits into national and European trends. It can be useful for researchers, planners and local governments who want to better understand regional tourism and make informed decisions. The economic proximity of Poland and Germany makes monitoring changes in the tourism market of our western neighbours an

important task for institutions involved in the tourism.
broadly understood development of Polish

References

- AHK Poland (Polish-German Chamber of Industry and Commerce), 2023. Profil gospodarczy Niemiec. Kraj – Ludzie – Biznes [In Polish].
- Bauer A., Gardini M.A., Sommer G., 2021. Szenarien für den Tourismus in Bayern 2040. Kempten: Hochschule für angewandte Wissenschaften Kempten. Bayerisches Staatsministerium für Wirtschaft. Landesentwicklung und Energie.
- Bayern Tourismus Marketing GmbH, 2023. Tourismus in Bayer – Statistiken&Zahlen, München.
- Bednarowska Z., 2015. Desk research : wykorzystanie potencjału danych zastanych w prowadzeniu badań marketingowych i społecznych. Marketing i Rynek 7, 18–26 [In Polish].
- CSO, 2023. Turystyka w Unii Europejskiej – dane za 2021 r. [In Polish].
- Czyż T., 2015. Metoda wskaźnikowa w geografii społeczno-ekonomicznej. Rozwój Regionalny i Polityka Regionalna 34, 9–19 [In Polish].
- Dwyer L., Edwards D., Mistilis N., Roman C., Scott N., 2009. Destination and enterprise management for a tourism future. Tourism Management 30 (1), 63-74.
- Frymark K., 2019. Wolny kraj Bawaria. Koniec udzielnego księstwa CSU? Prace OSW [In Polish].
- Godlewski A., 2016. Niemcy B stały się Niemcami A. Południowe landy biją na głowę regiony przemysłowe [In Polish].
- Kaliński J., 2008. Historia gospodarcza XIX i XX wieku. Polskie Wydawnictwo Ekonomiczne, Warszawa [In Polish].
- Karl H., Ranné O., 2001. Regional policy and the environment – the case of Germany. European Environment 11 (2), 103-111.
- Nalaskowski F., Dejna D., 2020. Potencjał badań edukacyjnych bazy danych Internetowej Rejestracji Kandydatów – metoda analityczna desk research. Kultura - Społeczeństwo - Edukacja 18 (2), 423–437 [In Polish].
- Orłowski D., Woźniczko M., 2018. Kuchnia narodowa w turystyce kulinarnej Niemiec. ZNUV 60 (3), 59-90 [In Polish].
- Pechlaner H., Zacher D., Paunovic I., 2016. Touristische Stakeholder in der zweiten Reihe – Empirische Befunde zu Ansichten ausgewählter Akteure des bayerischen Tourismus. [In:] Bieger T., Beritelli P., Gesellschaftlicher Wandel als Herausforderung im Alpen Tourismus, Berlin, 79-98.
- Schmude J., Filimon S., Namberger P., Linder E., Nam J.-E., Metzinger P., 2021. COVID-19 and the Pandemic's Spatio-Temporal Impact on Tourism Demand in Bavaria (Germany). Tourism: An International Interdisciplinary Journal 69 (2), 246-261.
- UNWTO, 2023. World Tourism Barometer 2023.
- Volgger M., Erschbamer G., Pechlaner H., 2021. Destination design: New perspectives for tourism destination development. Journal of Destination Marketing & Management 19.
- Wanner A., Seier G., Proöstl-Haider U., 2020. Policies related to sustainable tourism – An assessment and comparison of European policies, frameworks and plans. Journal of Outdoor Recreation and Tourism 29.

Internet sources

- <https://bayerischer-wald-verein.de/der-verein/> (Date of access: 15.06.2024).
- <https://businessinsider.com.pl/gospodarka/najwieksze-gospodarki-swiata-zmiana-na-podium-japonia-ma-problem/wfnzr> (Date of access: 10.01.2024).
- https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=DE&most_recent_value_desc=true (Date of access: 10.01.2024).
- <https://data.worldbank.org/indicator/st.int.arvl?locations=DE> (Date of access: 02.01.2024).
- https://ec.europa.eu/commission/presscorner/detail/en/ip_21_3048 (Date of access: 15.01.2024).

https://en.wikipedia.org/wiki/List_of_German_states_by_Human_Development_Index (Date of access: 26.06.2024).

<https://tourismus.bayern/> (Date of access: 15.06.2024).

<https://tourismus.bayern/wissensmanagement/statistiken-und-studien/> (Date of access: 15.06.2024).

<https://turystyka.rp.pl/nowe-trendy/art39750801-niemiecka-centrala-turystyki-turystow-ciagnie-donasznych-miast-wykorzystamy-to> (Date of access: 20.01.2024).

<https://whc.unesco.org/en/list/stat/#s7> (Date of access: 16.01.2024).

<https://wttc.org/research/economic-impact> (Date of access: 20.01.2024).

<https://www.deutschland.de/pl/topic/kultura/dlaczego-monachium-jest-najbardziej-przyjaznym-dozycia-miastem-na-swiecie> (Date of access: 02.01.2024).

<https://www.dw.com/en/germanys-10-most-visited-attractions/g-65001385> (Date of access: 20.01.2024).

<https://www.e-unwto.org/doi/epdf/10.5555/unwtotfb0280010020182022202310> (Date of access: 02.01.2024).

<https://www.imd.org/centers/wcc/world-competitiveness-center/rankings/world-competitiveness-ranking/rankings/wcr-rankings/> (Date of access: 16.01.2024).

<https://www.statista.com/statistics/1228395/travel-and-tourism-share-of-gdp-in-the-eu-by-country/> (Date of access: 02.01.2024).

<https://www.statista.com/statistics/209334/total-number-of-international-tourist-arrivals/> (Date of access: 02.01.2024).

<https://www.statista.com/statistics/561090/most-popular-city-destinations-germany/> (Date of access: 02.01.2024).

<https://www.statista.com/statistics/563988/tourists-country-of-origin-germany/> (Date of access: 02.01.2024).

<https://www.statista.com/statistics/569485/arrivals-accommodation-international-tourists-germany-state/> (Date of access: 02.01.2024).

<https://www.untourism.int/tourism-data/un-tourism-tourism-dashboard> (Date of access: 02.01.2024).

<https://www.waszaturystyka.pl/niemiecka-centrala-turystyki-uhonorowana-po-raz-czwarty-w-konkursie-top-100-innowacji/> (Date of access: 20.01.2024).