



# THE GERMAN TRAVEL MARKET

Facts and figures 2020

Status: March 2021

# The German Travel Market

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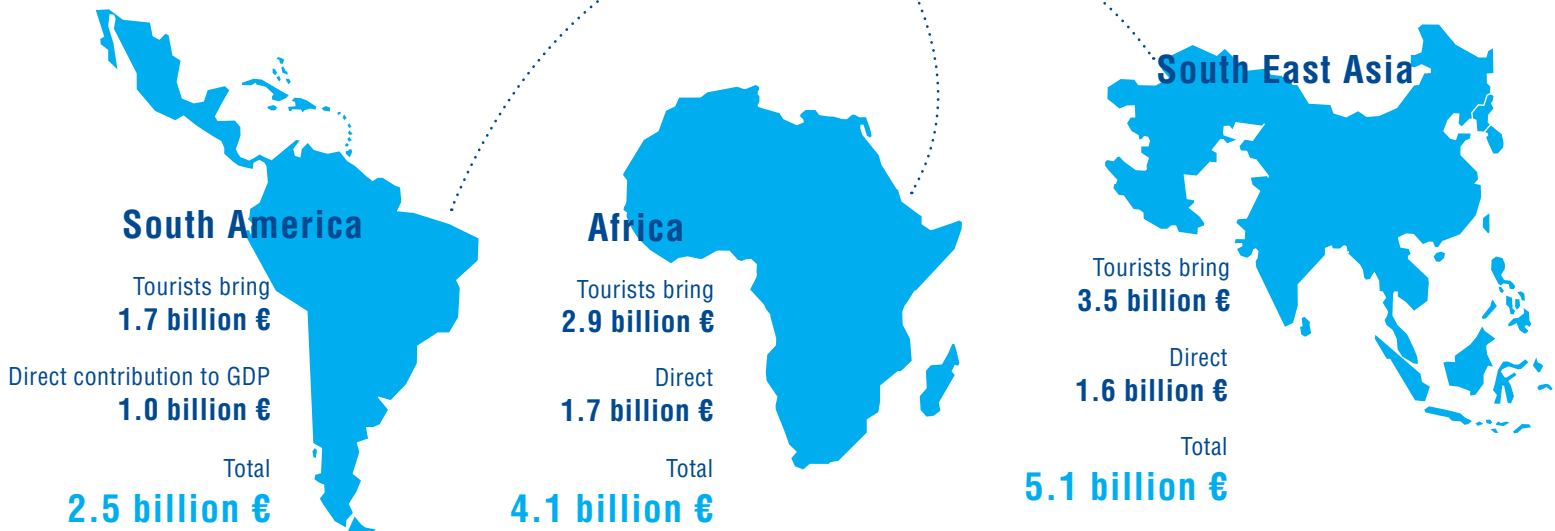
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Development in the German business travel market 2019  
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# Contribution of German tourists to ECONOMIC DEVELOPMENT in developing and emerging countries

For example: German tourists spend 1.7 billion euros in Central and South America/ Caribbean. This leads to a direct contribution to the GDP of one billion euros in this region. The indirect and induced effects contribute another 1.5 billion euros, so that tourism as a whole makes a contribution of 2.5 billion euros.

**19 billion €**  
German tourism contributes to the gross domestic product in developing and emerging countries



# Corona causes MAJOR PROBLEMS FOR THE TRAVEL INDUSTRY

Tourism economy suffers dramatically

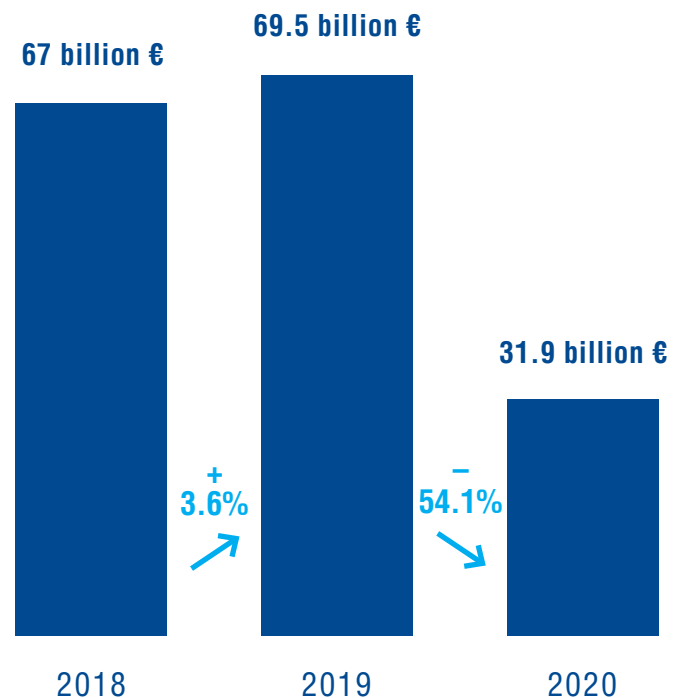
In the past few years, there has only been one path: growth. Year after year, travel spending by Germans increased significantly - most recently in 2019 to **69.5 billion euros**. Tourism was seen as a growth sector of the German economy.

The turnaround came in the Corona year 2020 - travel expenditure fell by 54 percent to **31.9 billion euros**.

The effects are massive: travel agencies, tour operators and many other companies in the industry are struggling to survive; for almost a year they have had hardly anything they can sell. This also means that the almost **three million jobs** provided by the tourism industry are in jeopardy.

The decline in tourism also has consequences in many countries, because in recent years the Germans were among the largest spenders for international travel. In 2020, the share of travel spending dropped to 2.1 percent (2019: 4.6 percent) of the total private consumption of German citizens.

## German travel spendings dropped by more than half



# The ECONOMIC IMPORTANCE

## of the tourism industry at a glance



**50.5 million**

holiday trips (of which > 39% are packages and linked travel arrangements organised with the help of tour operators/travel agencies)



**more than 50%**

of the tour operator trips the Germans book via travel agency



**2,300**

tour operators in Germany



**44.6 million**

Passengers on holiday trips of 5 days or more (previous year: 55.2 million)



**1.1**

Frequency of travel (Average number of holiday trips per traveller)



**63.1%**

Travel intensity (percentage of population travelling)



**2.9 million**

Employees in the tourism industry in Germany (= 7% of all jobs)



**302.3 million**

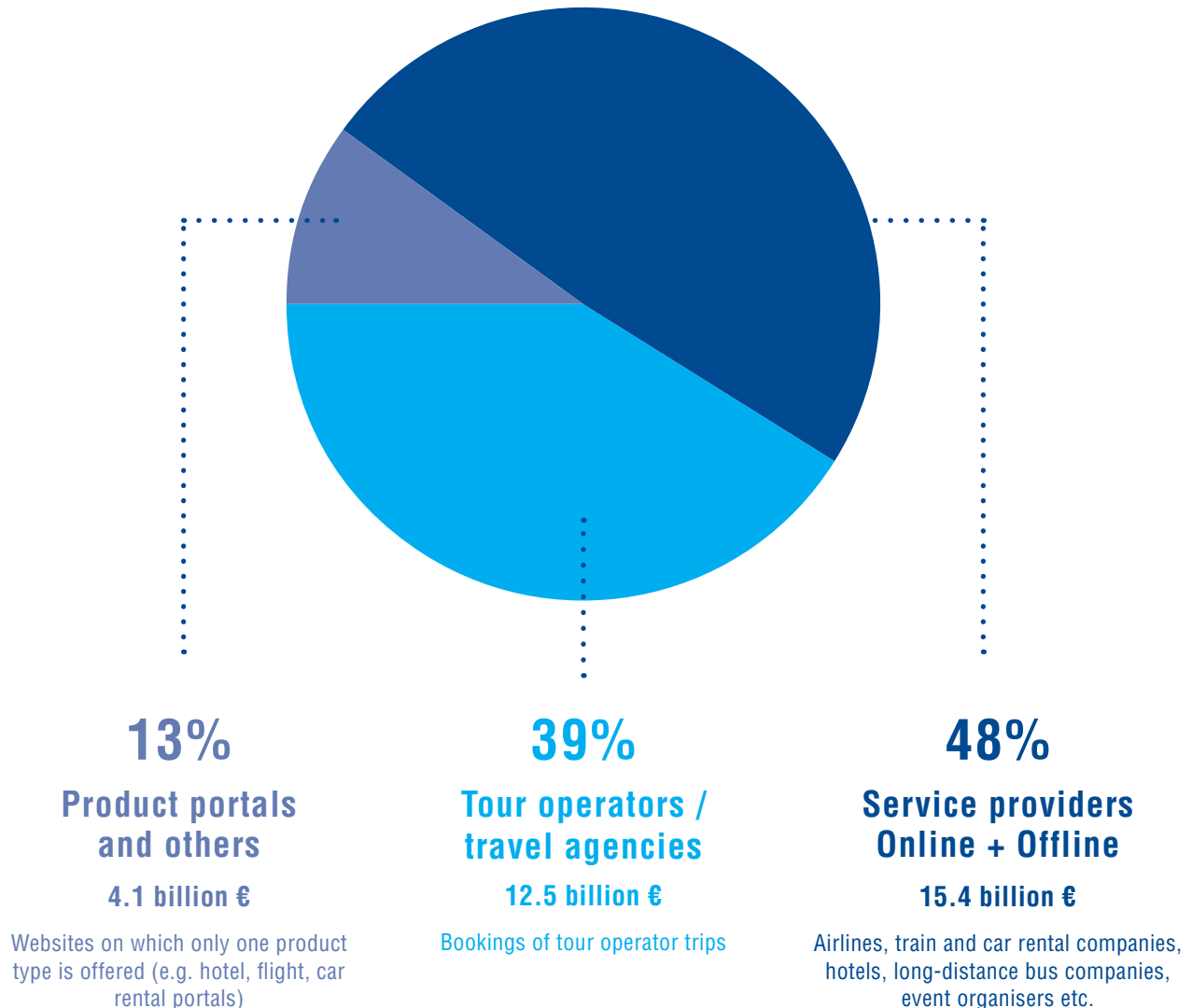
Overnight stays by residents and non-residents in Germany in 2020



**≈45%**

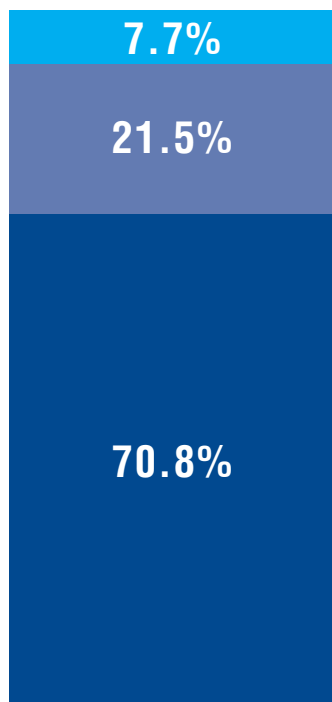
of the journeys of German citizens are spent in Germany in 2020.

# Market structure in the GERMAN TOURISM MARKET 2020



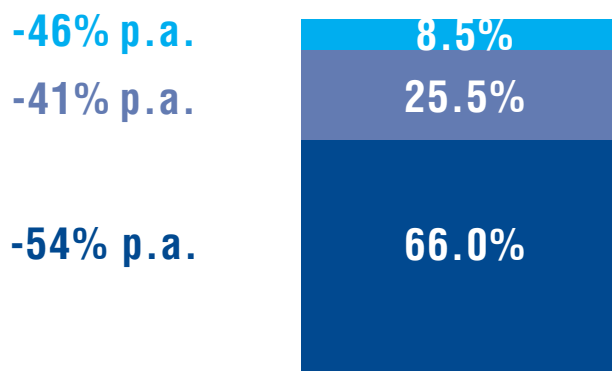
Distribution of total expenditure on private and holiday travel of German households with at least one overnight stay

**98.1  
billion €**



2019

**48.4  
billion €**



2020

● Auxiliary expenditure in the destination   ● Travel services booked in the destination   ● Travel services booked before departure

# TRAVEL AGENCY AND TOUR OPERATOR MARKET IN GERMANY





# Development of the TOUR OPERATOR AND TRAVEL AGENCY SALES in Germany

## Tour Operators

**33.7 billion €**  
Total turnover  
2017



**35.2 billion €**  
Total turnover  
2018



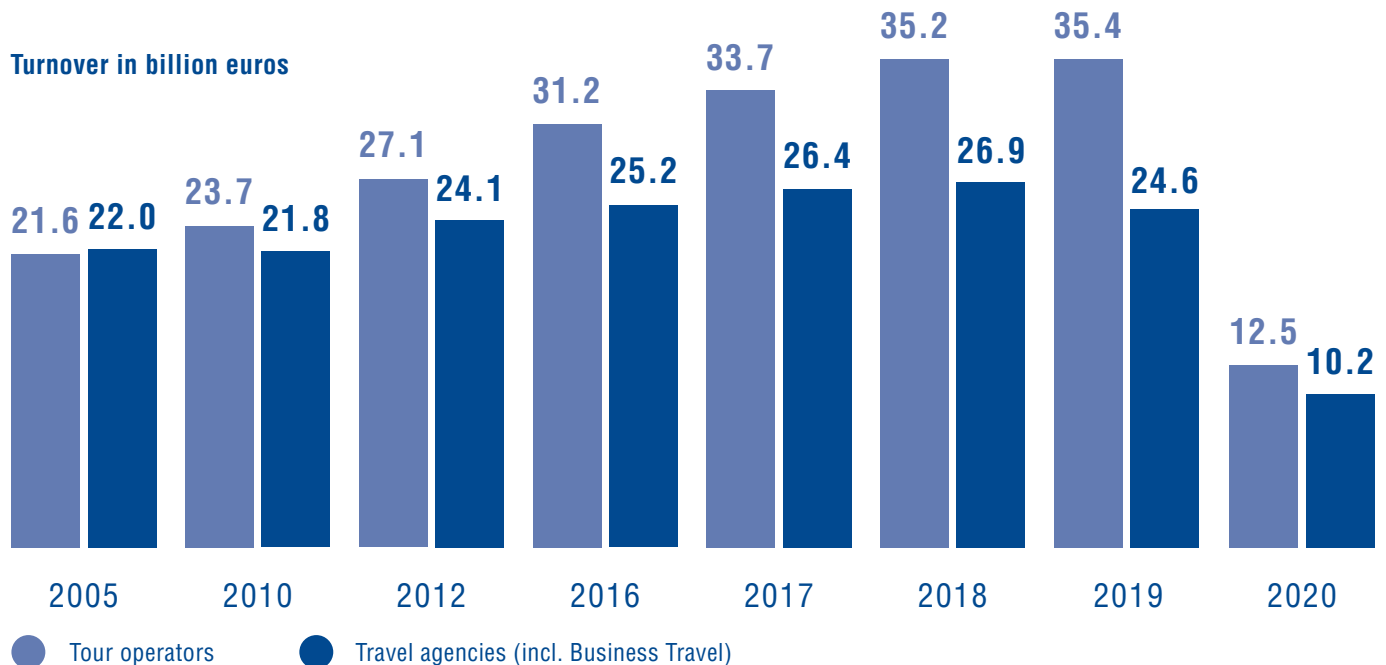
**35.4 billion €**  
Total turnover  
2019



**12.5 billion €**  
Total turnover  
2020

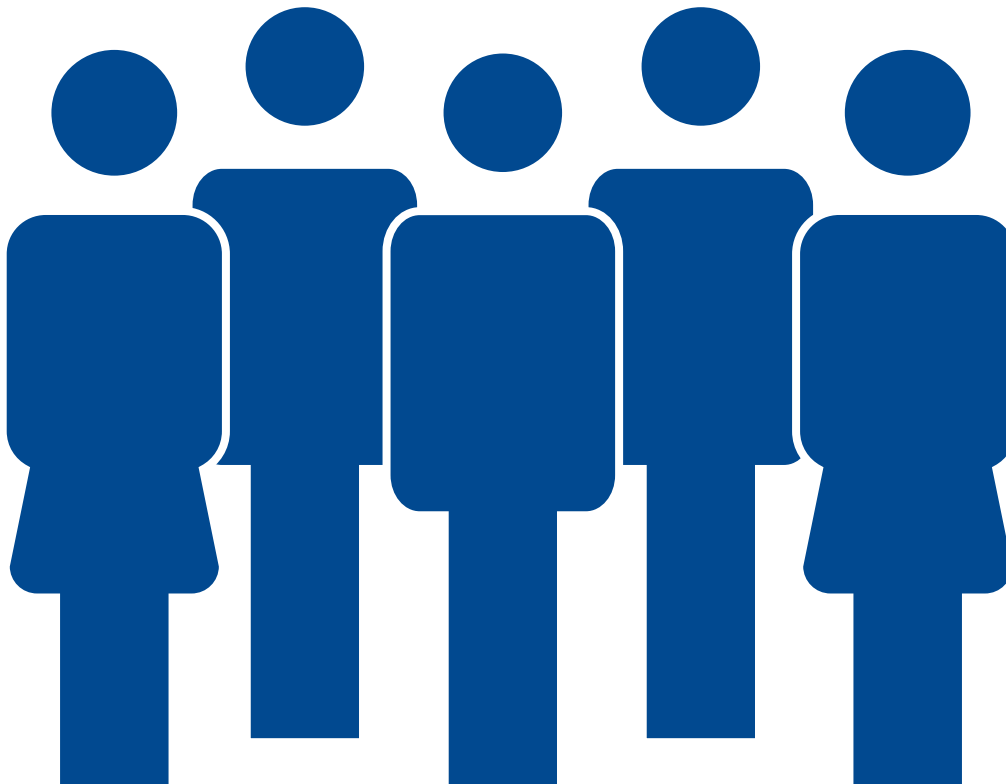


## Turnover in billion euros



## Employees of **TRAVEL AGENCIES AND TOUR OPERATORS**

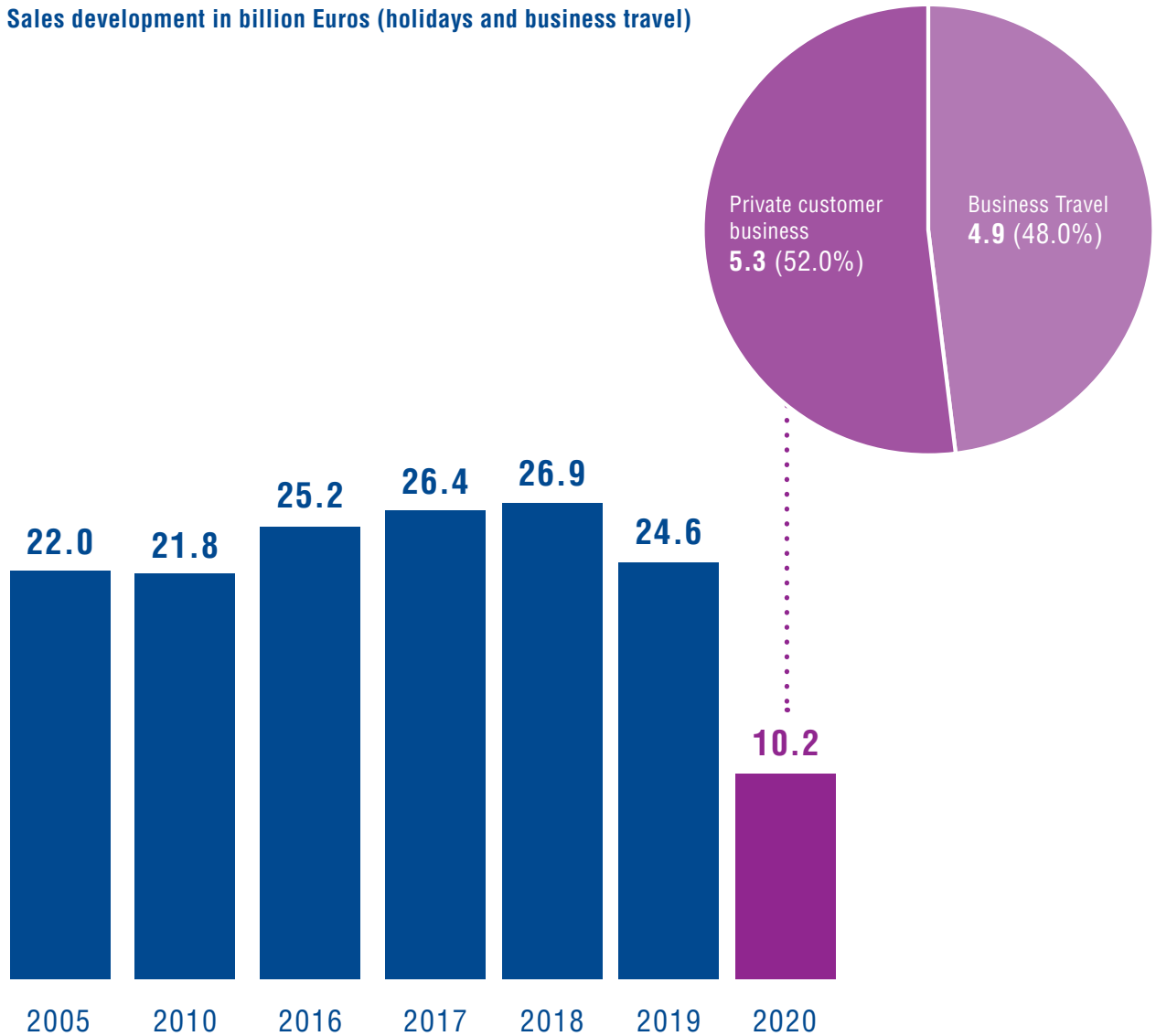
In 2020, travel agencies and tour operators employed 65,919 persons  
(previous year: 71,368).



# TRAVEL AGENCIES

make a difference

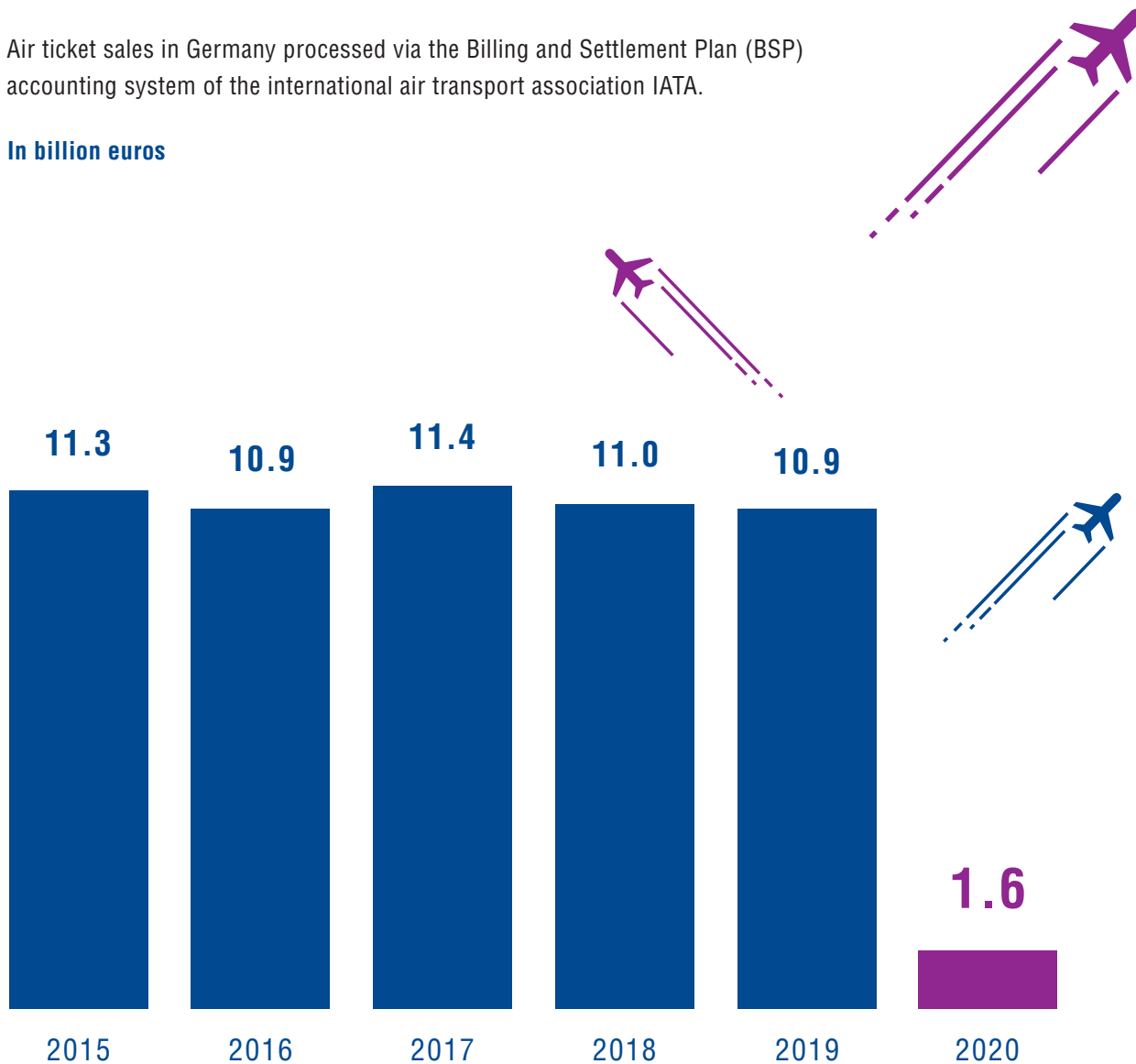
Sales development in billion Euros (holidays and business travel)



# Flight ticket sales of **IATA-AIRLINES** via travel agencies in Germany

Air ticket sales in Germany processed via the Billing and Settlement Plan (BSP) accounting system of the international air transport association IATA.

In billion euros

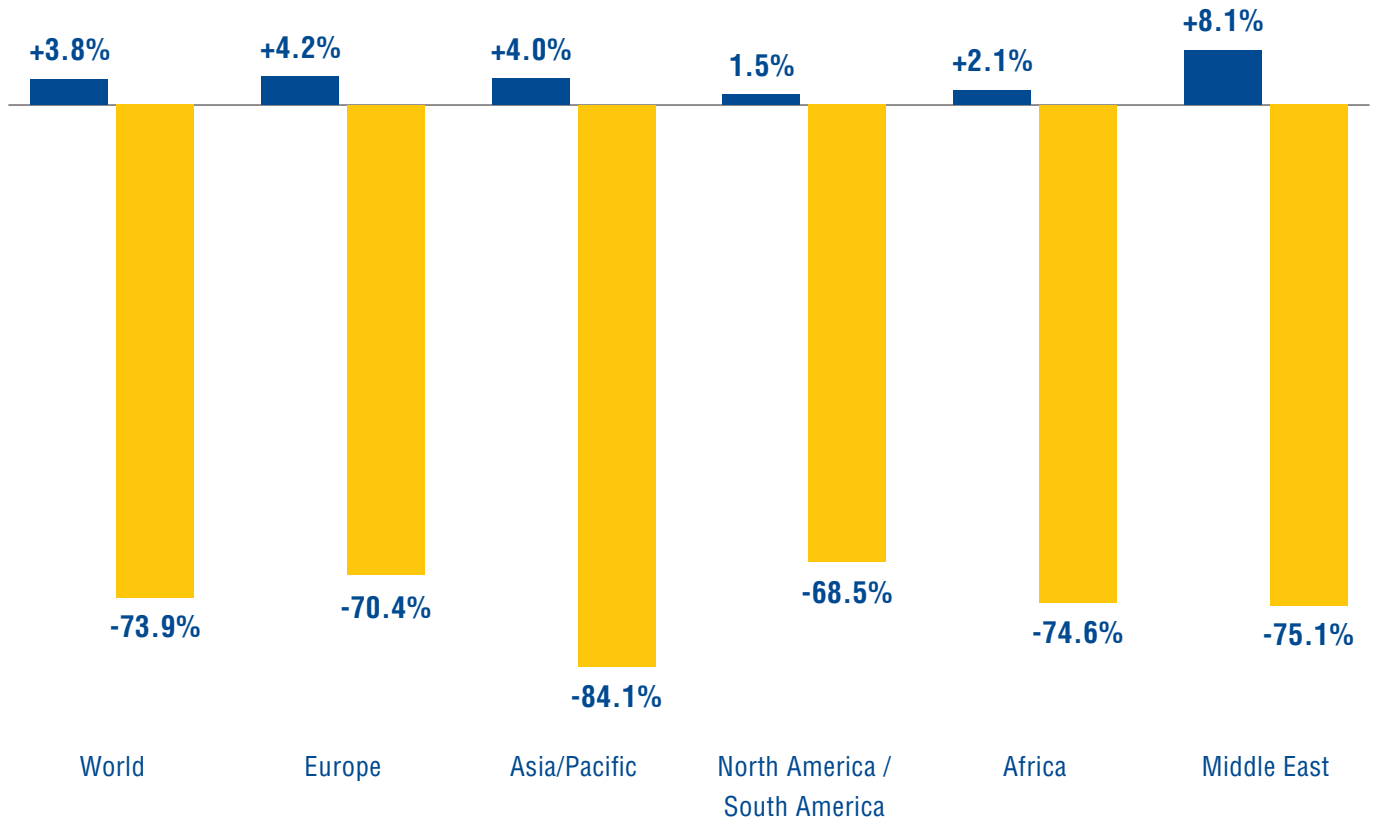


# DESTINATIONS IN GERMANY AND ABROAD



# International TOURIST ARRIVALS

In 2020, only 390 million (2019: 1.5 billion) international tourist arrivals were recorded worldwide. This corresponds to a decline of 74% compared to 2019.

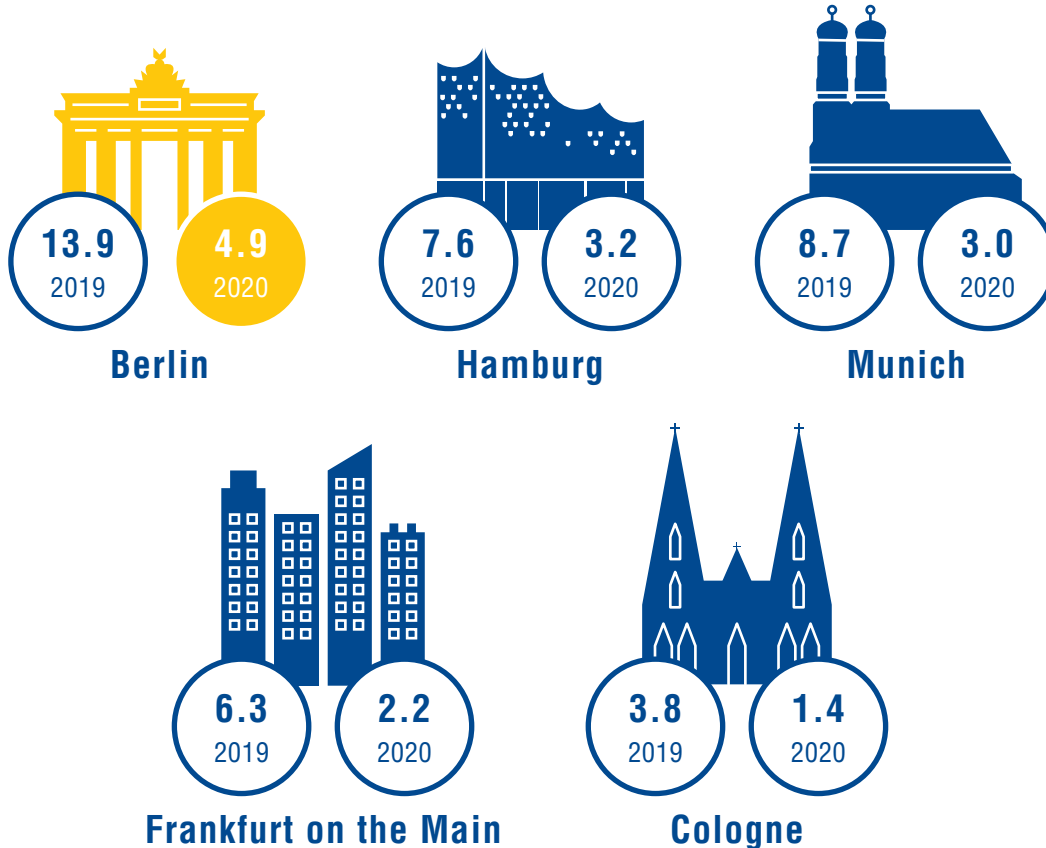


● 2019 ● 2020

# The 5 most popular **CITY TRIPS** in Germany 2020

The worldwide slump in tourism is also reflected in the number of visitors to city breaks. Here, too, there have been dramatic declines.

Guest arrivals, in million visitors



# The GERMAN HOLIDAY DESTINATIONS worldwide

Number of holiday trips of five days or more 2020

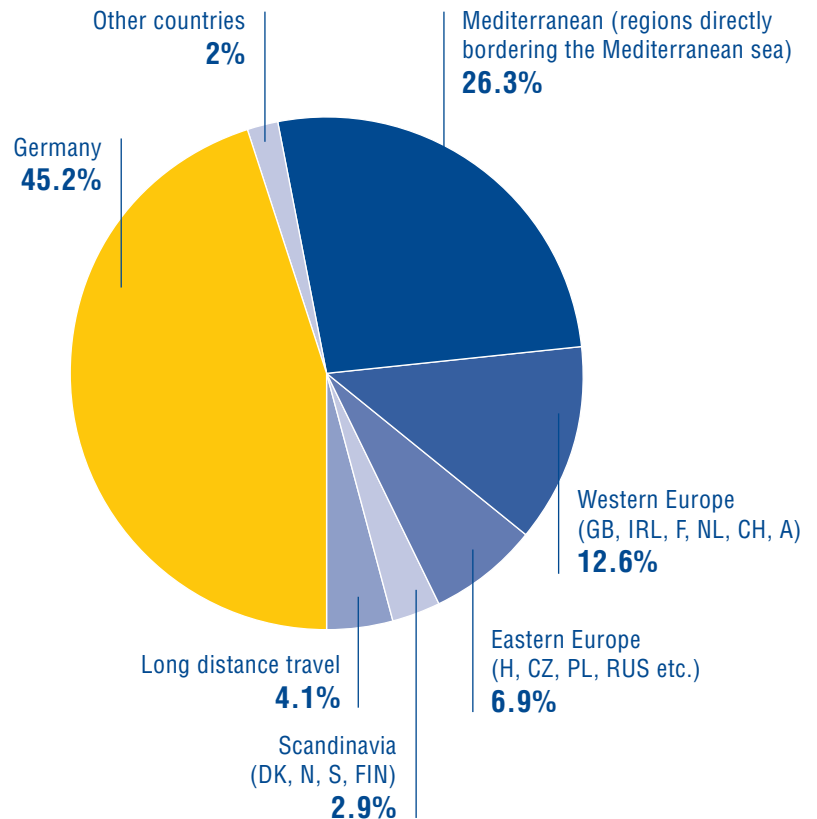


**50.5 million**

long holiday trips of the  
Germans

**54.8%**  
thereof abroad

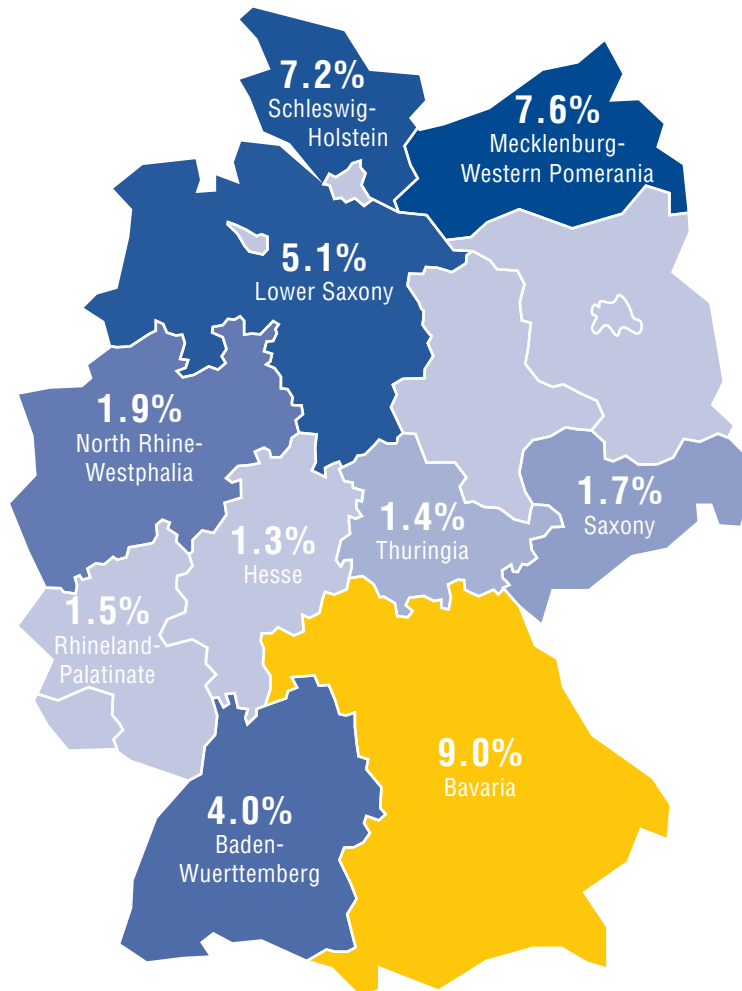
**45.2%**  
thereof Germany





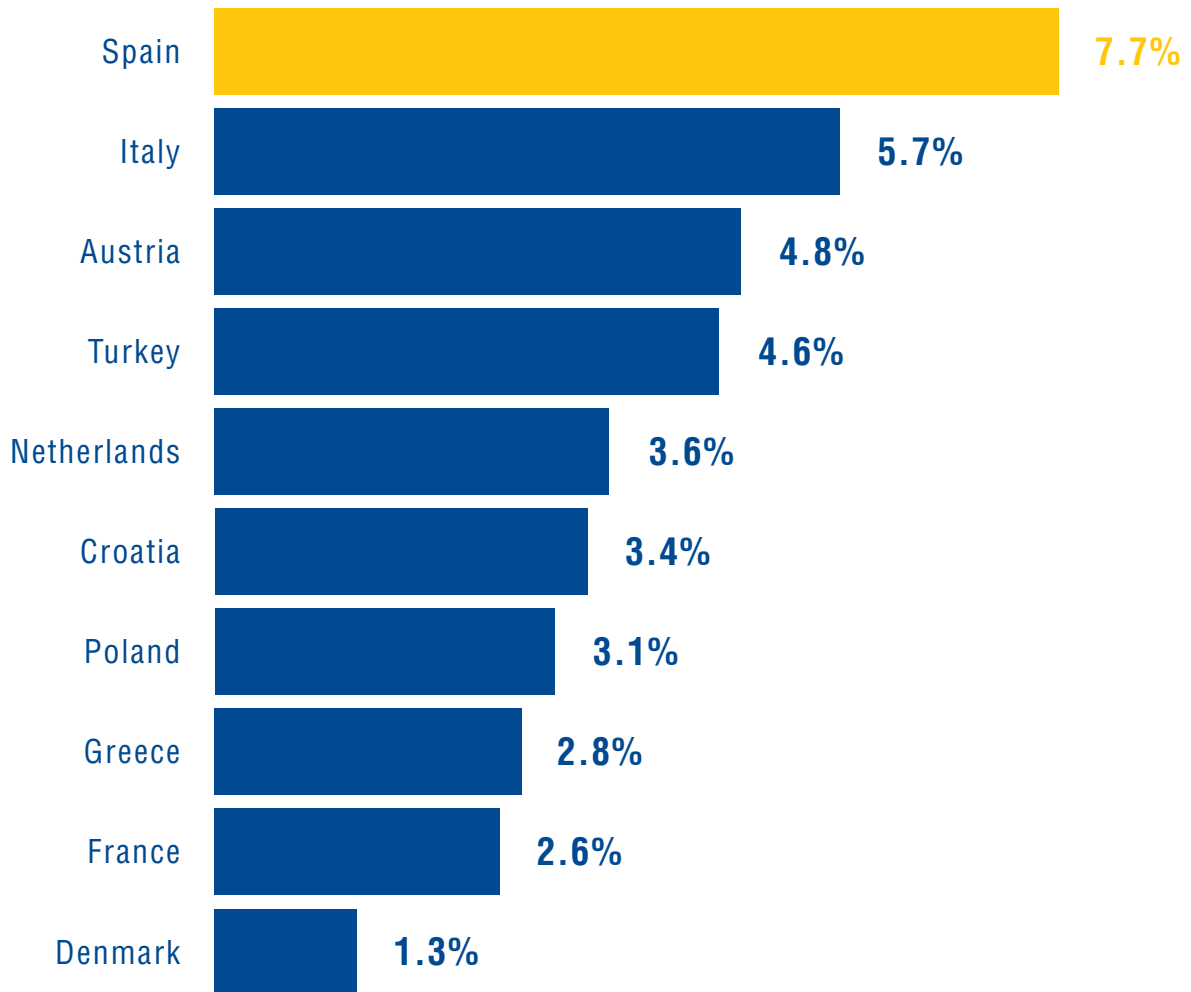
# The 10 most popular DOMESTIC DESTINATIONS within Germany

Share of all holiday trips of five days or more 2020

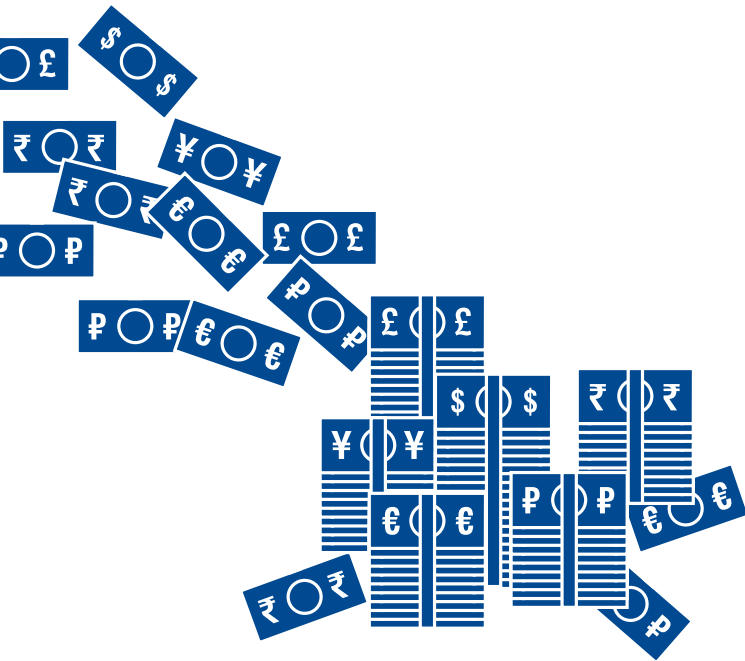


# The 10 most popular **FOREIGN DESTINATIONS** for Germans

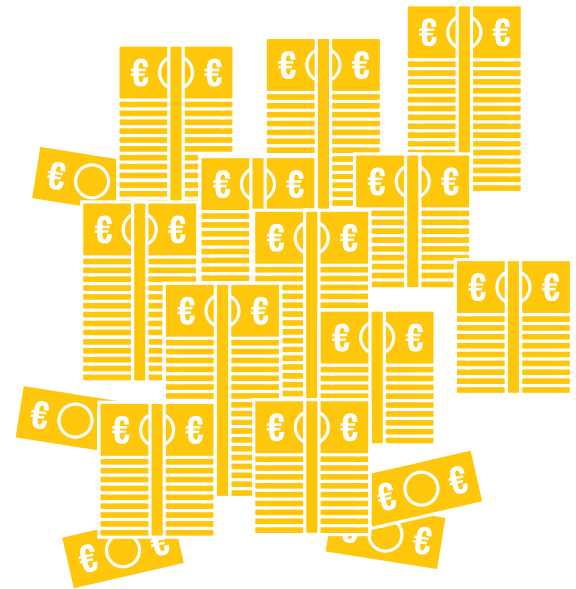
Share of all holiday trips of five days or more 2020



# TRAVEL INCOME AND TRAVEL EXPENSES of Germans



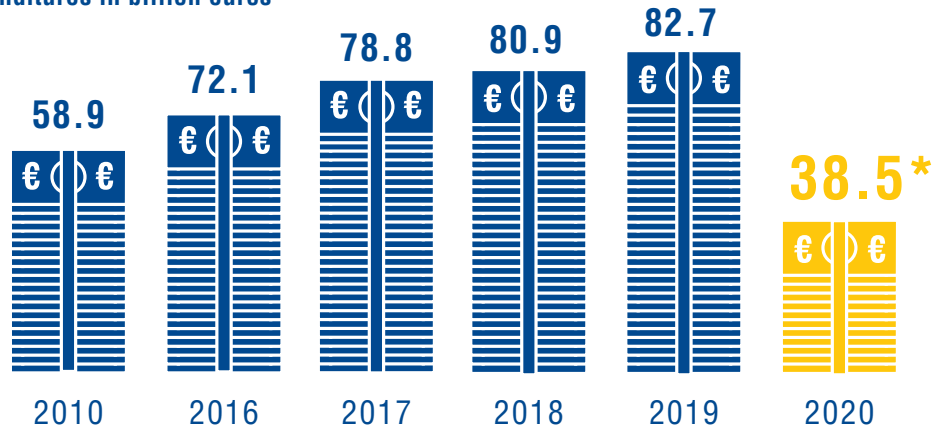
Income  
**19.6 billion €**



Expenses  
**38.5 billion €**

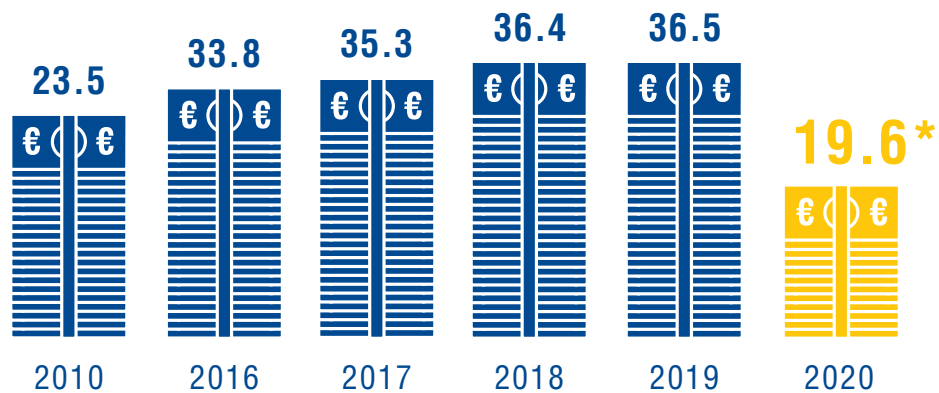
## Expenditures by Germans on their trips abroad\*

Expenditures in billion euros



## Germany's income from international travel

Income in billion euros



# The **AVERAGE DURATION** of main holiday trips

Ø length of stay in days (main holiday trips)



**11.6 days**

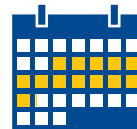
was the average duration  
of travel in 2020.



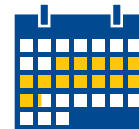
**13.0**  
2019



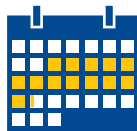
**13.0**  
2018



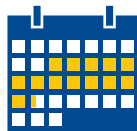
**13.1**  
2017



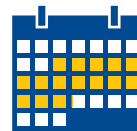
**13.2**  
2016



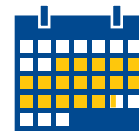
**13.2**  
2010



**13.4**  
2008



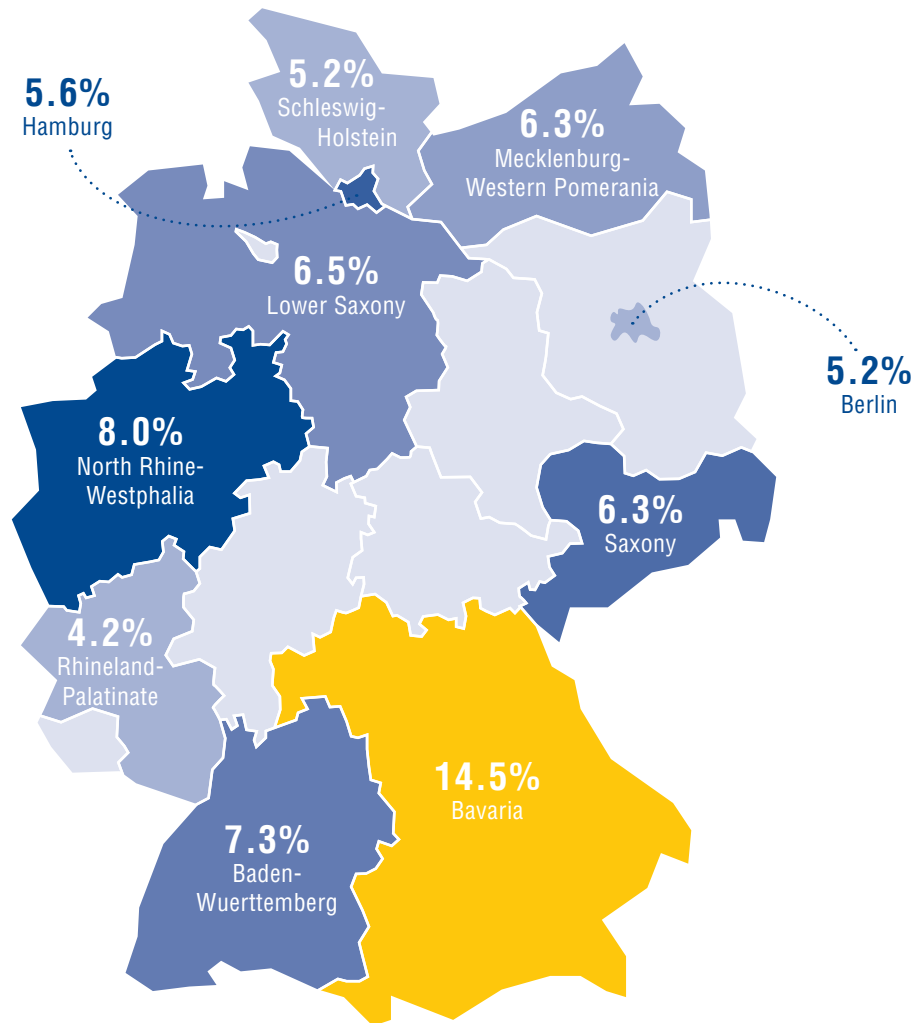
**15.1**  
1998



**17.4**  
1983

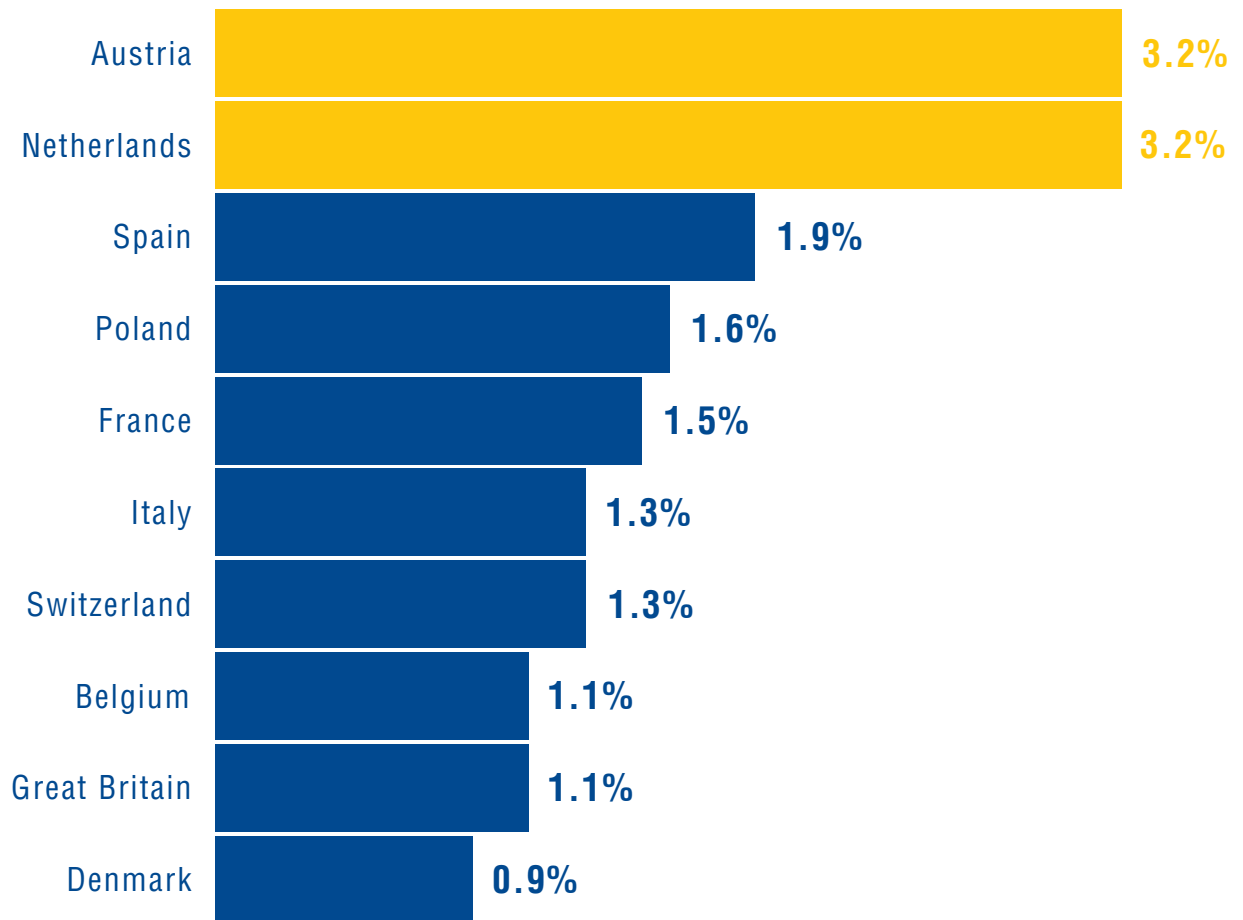
# The 10 most popular SHORT TRIP DESTINATIONS of Germans in Germany

Share of all short breaks, travel duration two to four days in 2020



## The 10 most popular **SHORT TRIP DESTINATIONS** of Germans abroad

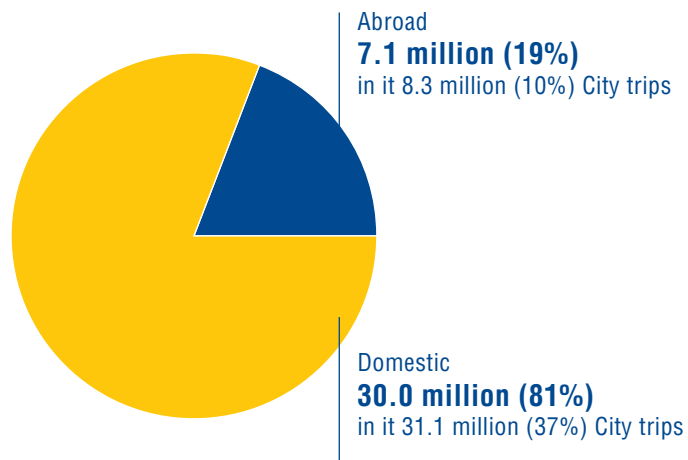
Share of all short breaks, travel duration two to four days in 2020



# SHORT BREAKS IN GERMANY AND ABROAD

by Germans

## Travel duration two to four days in 2020



**37.1 million**

total trips

## Day trips made by Germans 2020

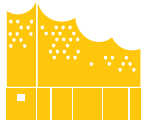
Number of one-day private trips in thousands (from 50 km distance)





# The most popular CITY DESTINATIONS for Germans

Domestic destinations: Share of all short breaks, travel duration two to four days in 2020



**5.6%**

Hamburg



**5.2%**

Berlin



**3.6%**

Munich



**2.4%**

Dresden



**1.4%**

Cologne

Foreign destinations: Share of all short breaks, travel duration two to four days in 2020



**1.0%**

Amsterdam



**0.6%**

Barcelona



**0.5%**

London



**0.5%**

Vienna



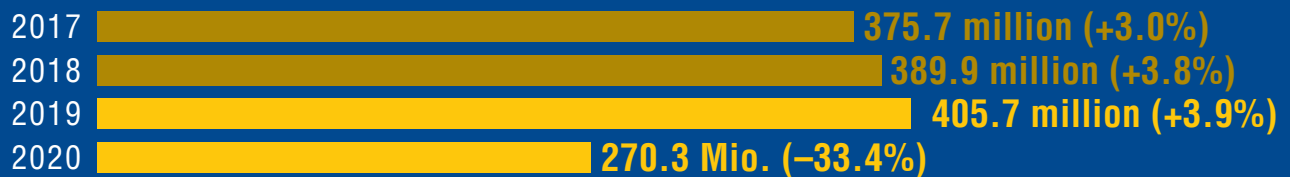
**0.4%**

Paris

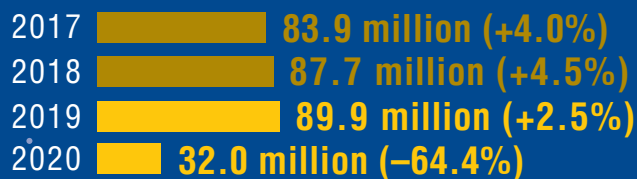
# All OVERNIGHT STAYS in Germany

As a result of the worldwide slump in tourism, overnight stays in Germany also fell significantly. At 302.3 million, the total number of overnight stays was 39% below the previous year's figure. Overnight stays by visitors from Germany fell by 33.4% to 270.3 million, those of visitors from abroad by 64.4% to only 32.0 million.

## Overnight stays of German visitors

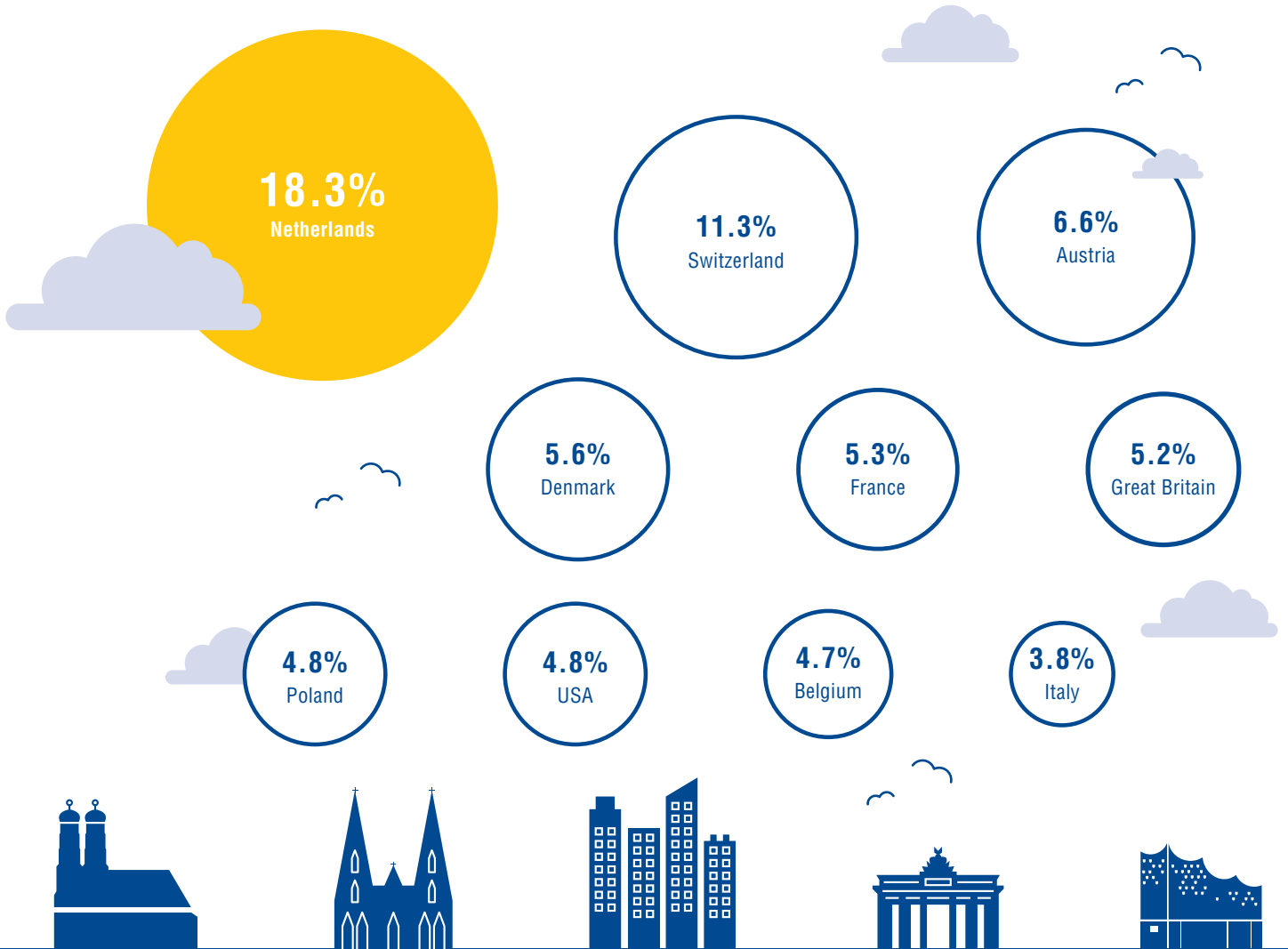


## Overnight stays by foreign visitors



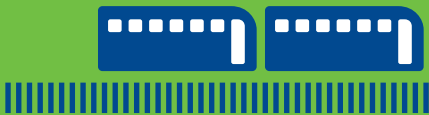
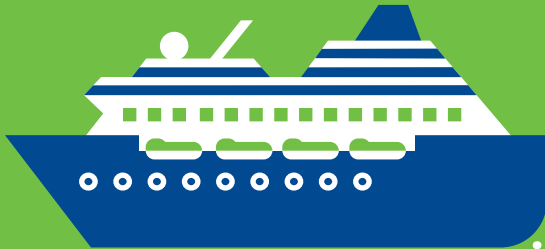
# The most important SOURCE MARKETS for Germany

Share of all overnight stays from abroad



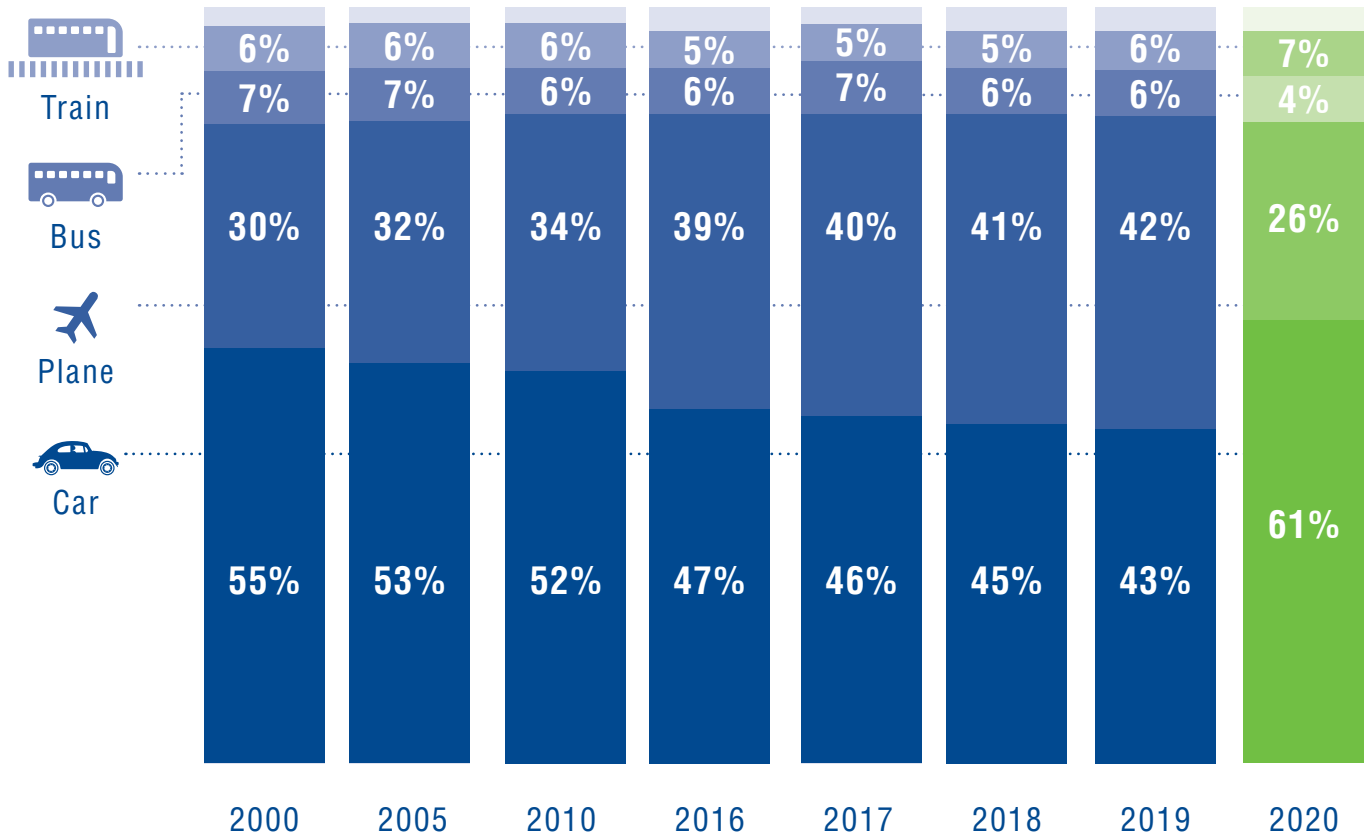


# MEANS OF TRANSPORT



# The most popular MEANS OF TRANSPORT for holiday trips

German holiday trips of 5 days or more, percentage share

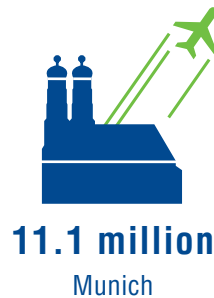
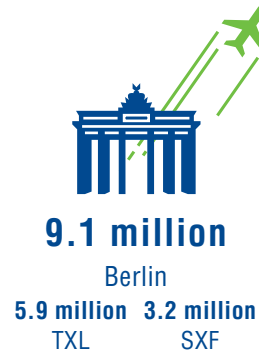
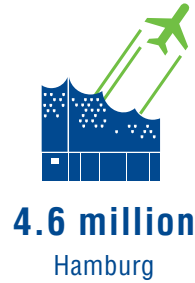
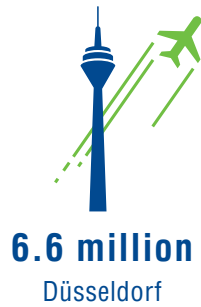


Difference to 100 percent: other means of transport such as ship

Source: Reiseanalyse 2021

# The 5 biggest **AIRPORTS** in Germany

Number of passengers in millions in 2020



# PASSENGER VOLUME

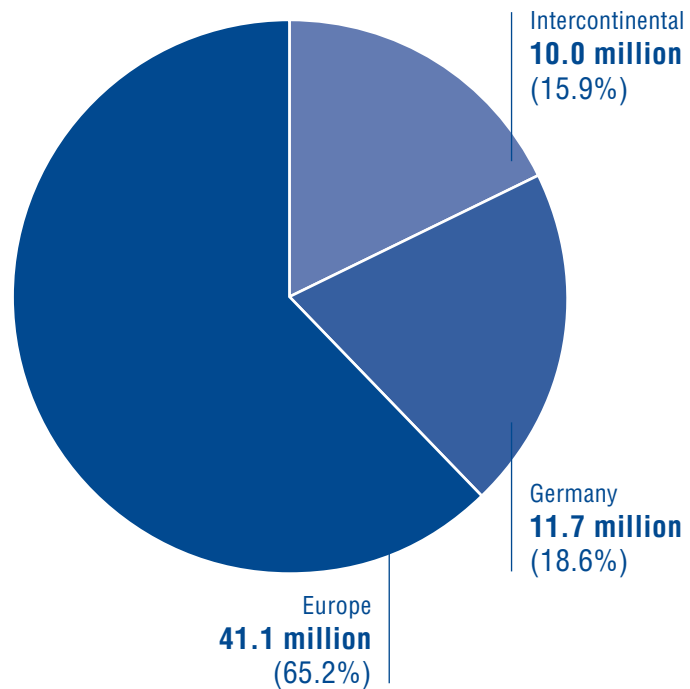
## in aviation

In 2020, there was a dramatic decline in global air traffic. In total, 63.0 million passengers started and landed at German airports (2019: 248.1 million). This is a decline of 74.6 %. In domestic air traffic, there was a decline of 74.7%, in intra-European traffic of 74.0% and in intercontinental traffic a decline of 77.1%.



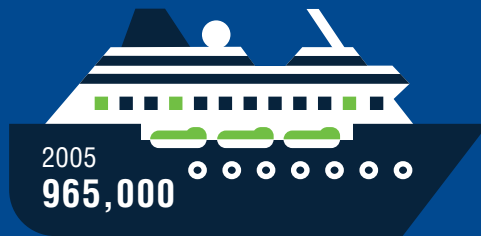
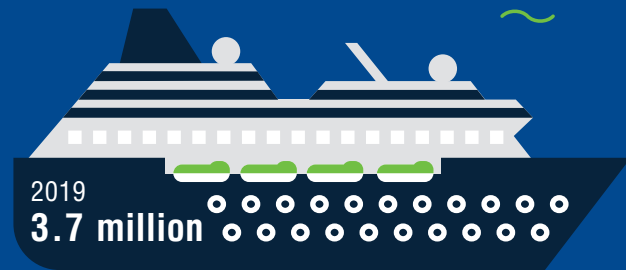
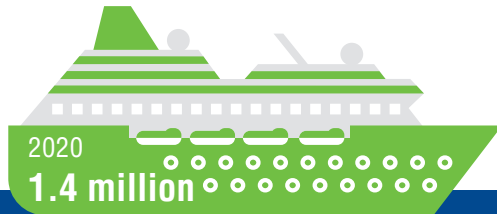
**63.0 million**

Total air passengers (excluding transit)



# CRUISES

Passengers on rivers and oceans





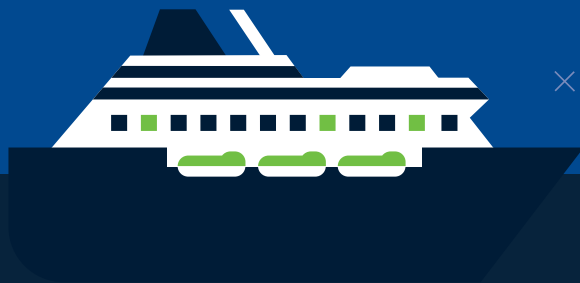
# The CRUISE MARKET Germany

## Ocean Cruises

	2018	2019	2020
Number of passengers	2,602,900	2,943,400	1,097,900
Expenses in advance, in million euros	4,786.6	5,121.0	2,078.8
Expenses in advance, per person/trip	1,839 €	1,740 €	1,893 €
Ø Travel time	10.4 nights	10.9 nights	10.6 nights

## River Cruises

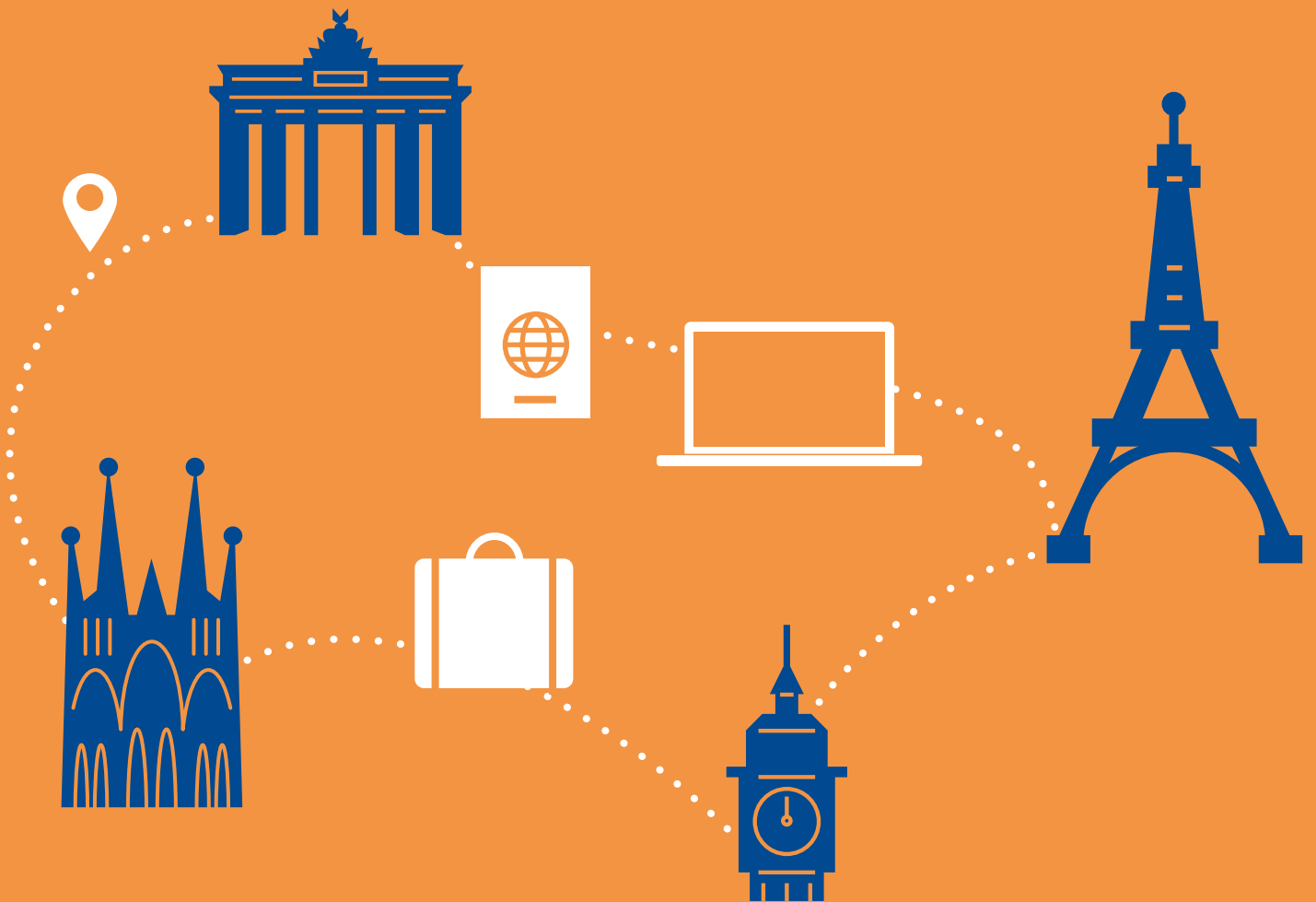
	2018	2019	2020
Number of passengers	685,200	727,400	307,400
Expenses in advance, in million euros	815.0	853.2	300.0
Expenses in advance, per person/trip	1,189 €	1,173 €	976 €
Ø Travel time	8.1 nights	8.3 nights	7.4 nights



Source: GfK Mobilitätsmonitor

Changed survey methodology, therefore these data are only comparable to a limited extent with the data from the publications of previous years.

# BUSINESS TRAVEL MARKET



## Development in the German **BUSINESS TRAVEL MARKET** 2019

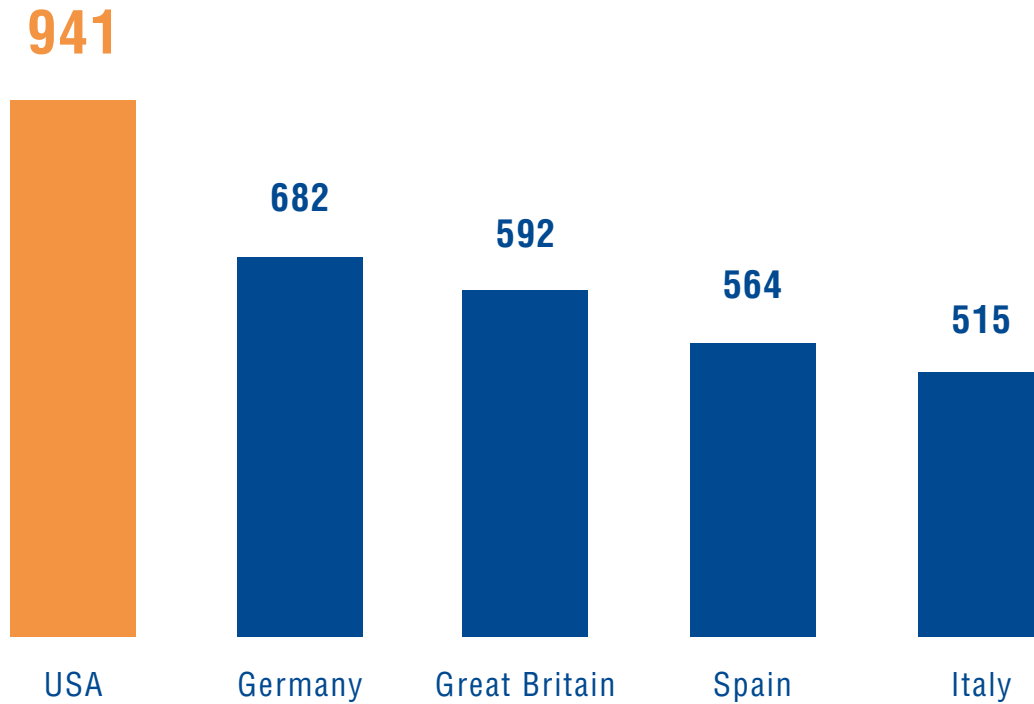
	2017	2018	2019
<b>Number</b>	<b>187.5 million</b>	<b>189.6 million</b>	<b>195.4 million</b>
Average costs	<b>307 €</b>	<b>310 €</b>	<b>312 €</b>
Costs per person / day	<b>157 €</b>	<b>162 €</b>	<b>162 €</b>
<b>Total overnight stays Business Travel</b>	<b>72.5 million</b>	<b>72.5 million</b>	<b>74.3 million</b>
Thereof companies with 10-500 employees	<b>40.6 billion €</b>	<b>41.3 billion €</b>	<b>42.3 billion €</b>
Thereof companies with >500 employees	<b>11.9 billion €</b>	<b>12.2 billion €</b>	<b>13 billion €</b>
<b>Total costs</b>	<b>52.5 billion €</b>	<b>53.5 billion €</b>	<b>55.3 billion €</b>



**In 2019, there were a total of 189.6 million business trips from Germany.**

**TOP 5**  
**MICE COUNTRIES**  
**worldwide 2019**

**Number of trade fairs**



# Ranking MICE CITIES worldwide 2019

Number of congresses in the 5 most important congress cities



# Imprint

## **YOUR CONTACTS**

### at DRV

As the central association, the DRV represents the travel industry in Germany and is primarily committed to the interests of tour operators and travel agents. Behind the DRV is a significant economic force: its members generate the majority of sales in the tour operator and travel agent market. Several thousand member companies, including numerous tourism service providers, make the DRV a strong community that bundles the diverse interests – in line with the motto „The voice of the travel industry.“



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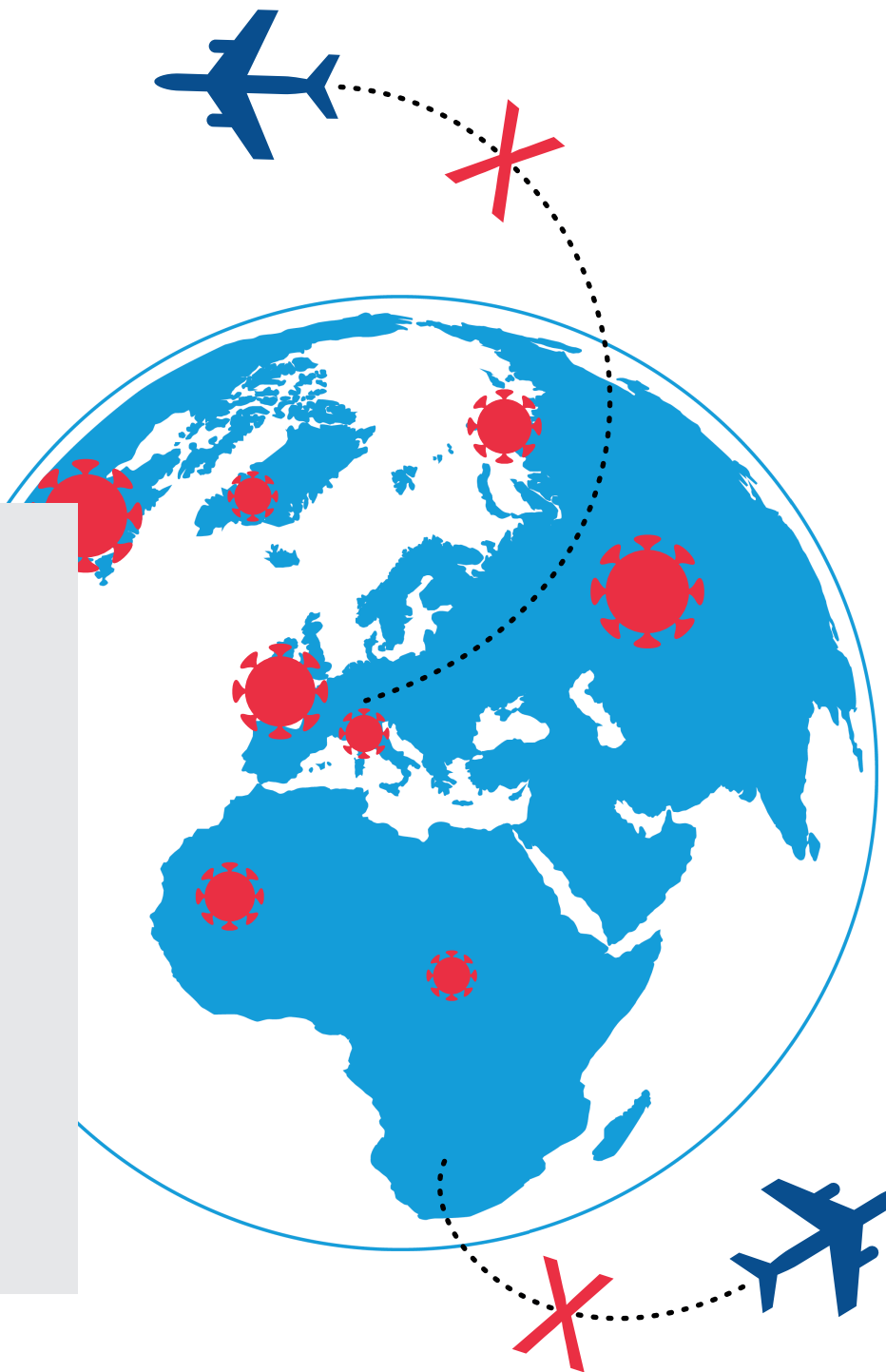
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