



THE GERMAN TRAVEL MARKET

Figures and facts 2017



with the collaboration of

THE VOICE OF THE
TRAVEL INDUSTRY

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Tourism as an economic factor

The tourism industry is one of the growth industries of the German economy. It secures and creates jobs and ensures comprehensive additional investments. The gross value added of the tourism industry amounts to more than EUR 105 billion according to the study “Tourism as an economic factor”.

Taking into account indirect and induced effects, the total gross value added which can be allocated to tourism amounts to EUR 231.5 billion. The tourism industry secures 2.9 million jobs in Germany.

The total consumption expenditure of tourists in Germany amounted to EUR 287.2 billion in 2015, including EUR 224.6 billion which were spent by German tourists alone.*

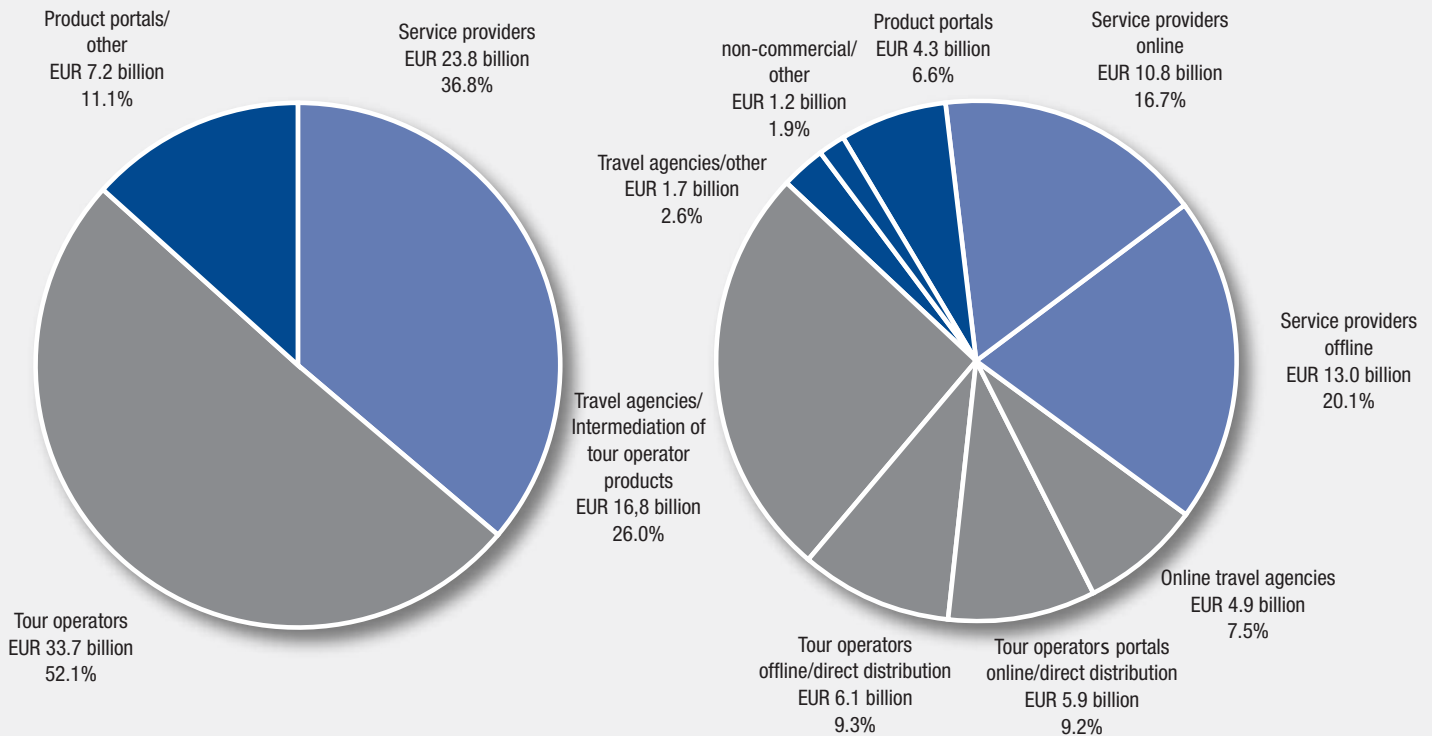
The Germans ranked in 2017 again amongst the largest net foreign exchange earners in the international travel industry. The travel expenditure outside Germany corresponds to 4.2% of the total private consumption of federal citizens (2016: 4.3%).

Definition of gross value added

Gross value added specifies the total value of all goods and services produced, minus so-called advance contributions. This includes all goods and services which are processed or consumed during production.

Indirect effects cover the gross value added of the providers of advance contributions. Induced effects are generated by the spending of additional income, which results from direct and indirect effects.

Structure of the German tourism market

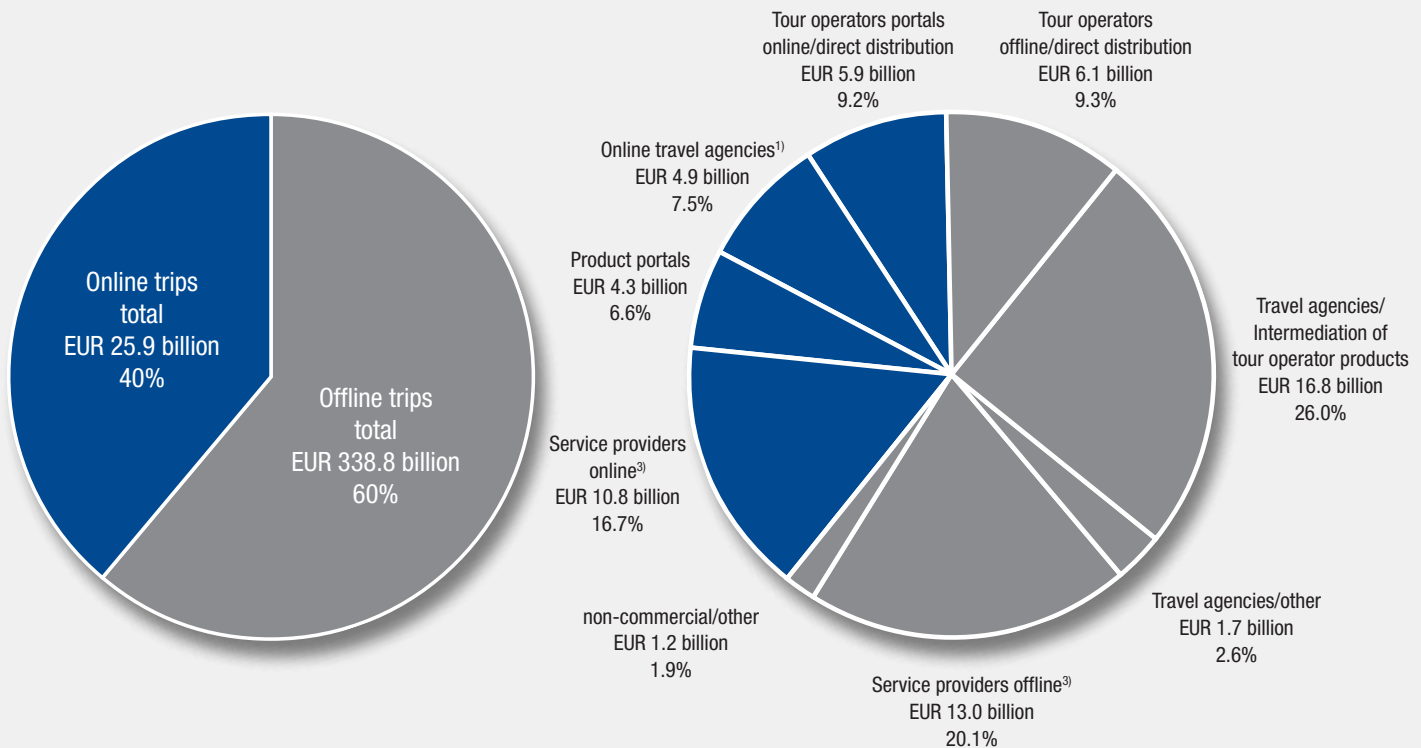


1) Service providers = airlines, railways, car rental companies, hotels, long-haul bus companies, event organizers etc.

2) Product portals = websites offering only mono products (hotel, airline, car rental portals)

3) Online travel agencies = websites offering tour operator services

Development of turn over (online/offline) for holidays and private trips



1) Product portals = websites offering only mono products (car rental, car and rental portals) - provisional values

2) Online Travel Agencies = Websites on which travel promotions advertise - preliminary values

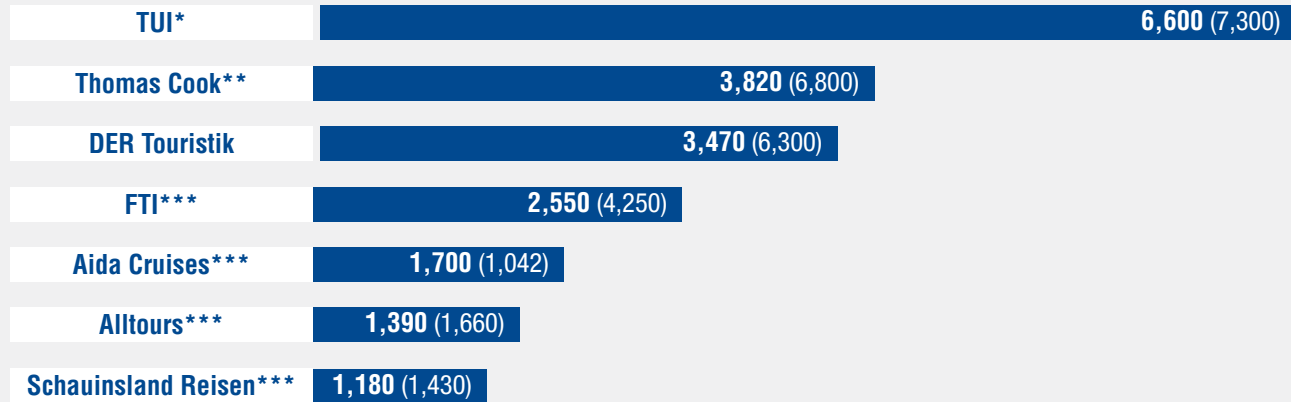
3) Service providers = airlines, railways, hotel and car rental companies, long-haul bus companies, event organizers etc.

Perfectly cared for – tour operator market grows

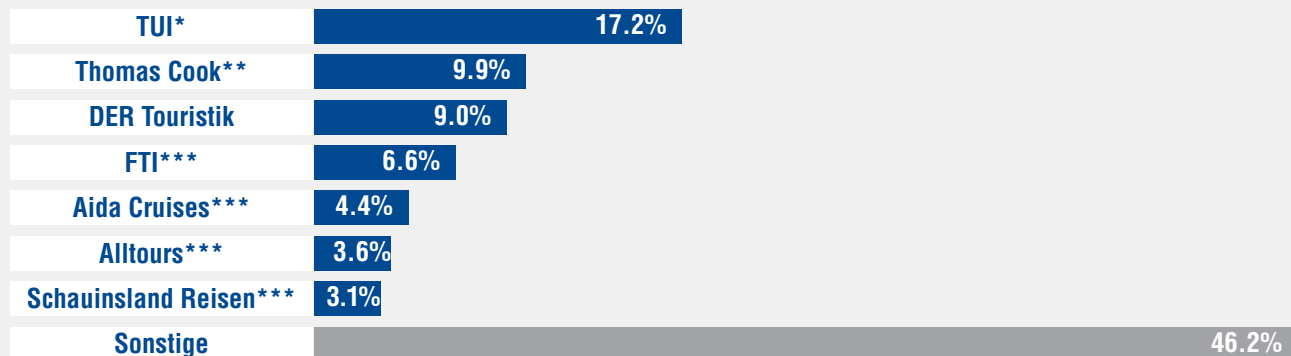


The largest tour operators in Germany

Sales revenues in EUR million (participants in thousands in 2017)



Market shares of tour operators



Referred to total sales revenues of EUR 38.4 billion of the German tour operators in 2017

Sources including graphics page 6: own calculations, FWW analyst 2017

*including TUI Cruises + HLKF; ** including Condor Flight-only and source market Austria; *** including source markets Austria and Switzerland

It does not work without a travel agency

**Sales development year-on-year
(Holidays and business trips)**



EUR 25.2 billion



2016

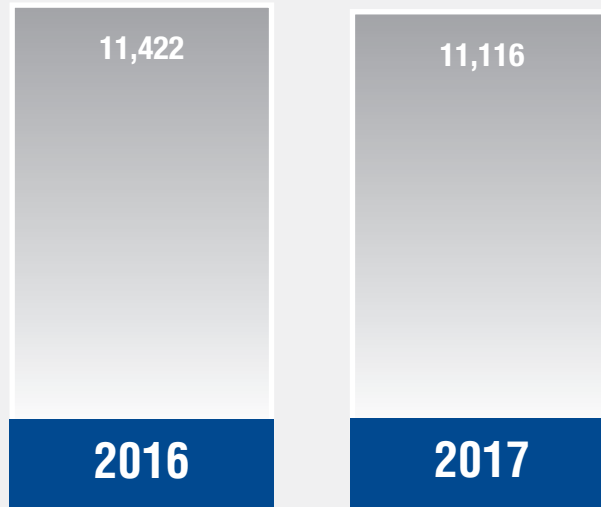


EUR 26.4 billion



2017

How many high-street travel agencies exist in Germany?



What is the breakdown of sales revenues of the travel agencies?

Consolidated sales revenues of all travel agencies in EUR billion		2017
Total sales revenues		26.4
Including	Private trips	18.5
	Business travel	7.9

Travel world champion on the move

69.6 MILLION

**LONG HOLIDAY TRIPS
OF THE GERMANS**



72% of these outside Germany

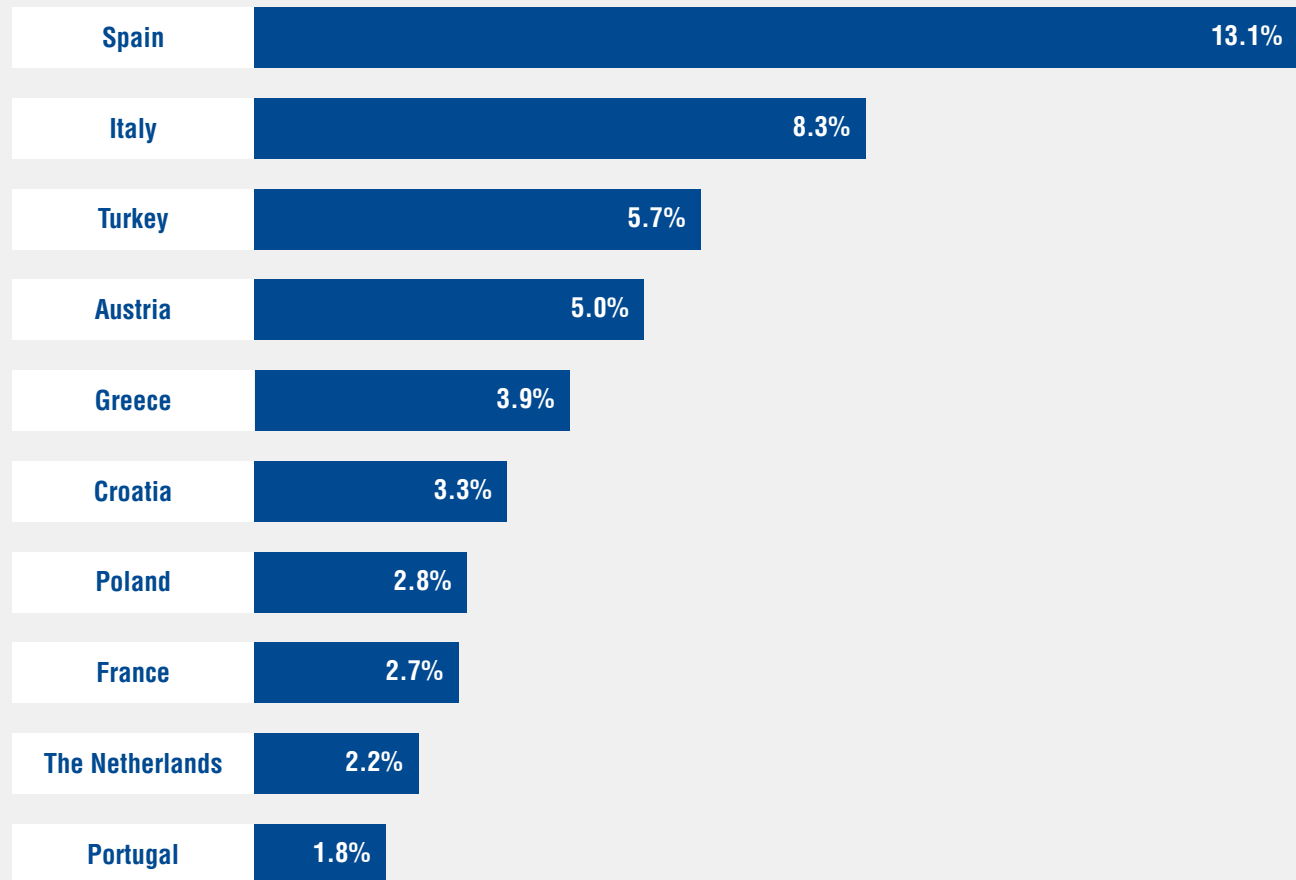
Where do the Germans spend their holiday?

Number of holiday trips from 5 days onwards in 2017

Gesamt		69.6 million trips
Including	Germany:	27.6%
	Abroad:	72.4%
	– Mediterranean (regions directly bordering on the Mediterranean)	36.9%
	– Western Europe (GB, IRL, F, NL, CH, A)	12.4%
	– Eastern Europe (H, CZ, PL, RUS etc.)	7.7%
	– Scandinavia (DK, N, S, FIN)	3.5%
	– Long-distance journeys	8.4%

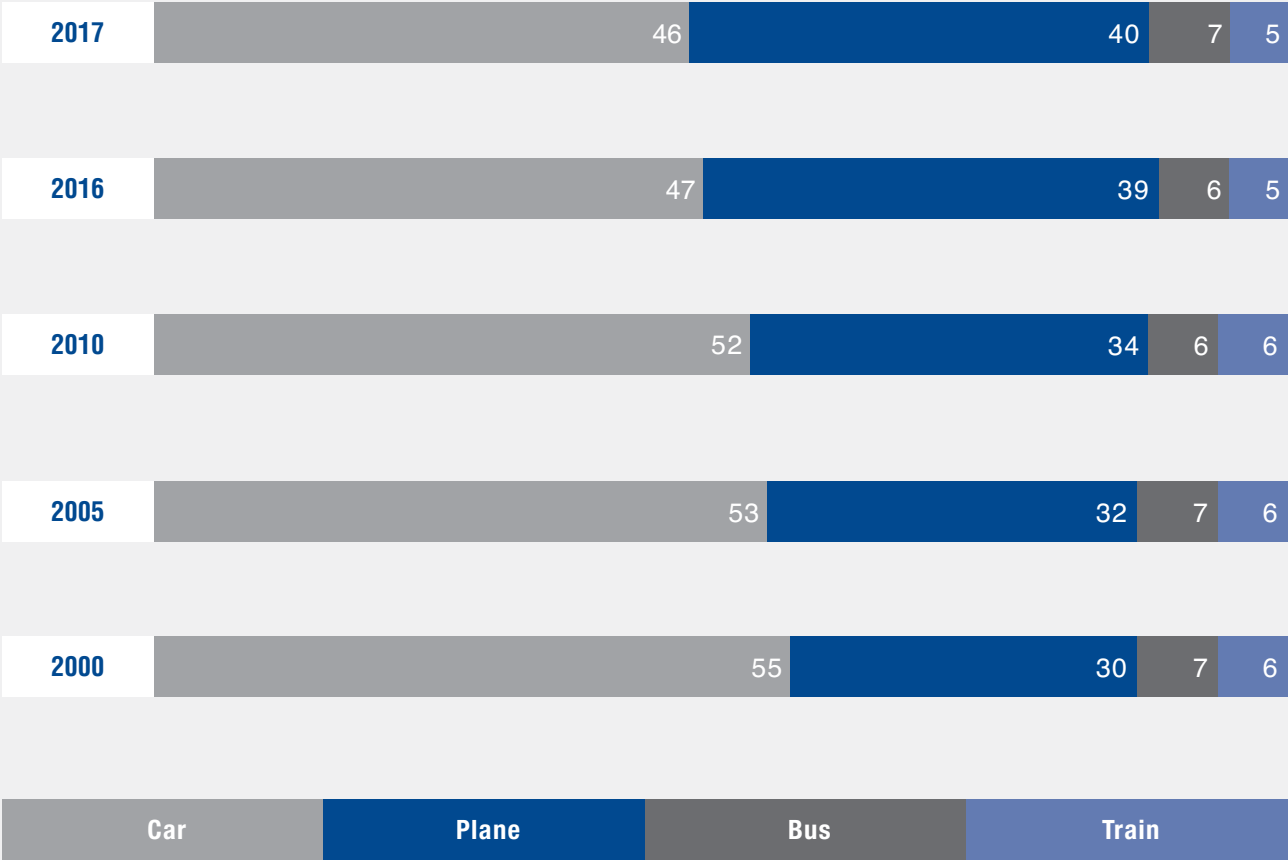
The 10 most popular foreign holiday destinations of the Germans

Shares in all holiday trips from 5 days onwards in 2017



What are the most popular means of transport for tourists?

Holiday trips from 5 days onwards, in %



Difference compared to 100%: other means of transportation such as cruises
 Source: RA Reiseanalyse 2018

Travel income and travel expenditure

Income



EUR **34.9** billion
The world
loves Germany

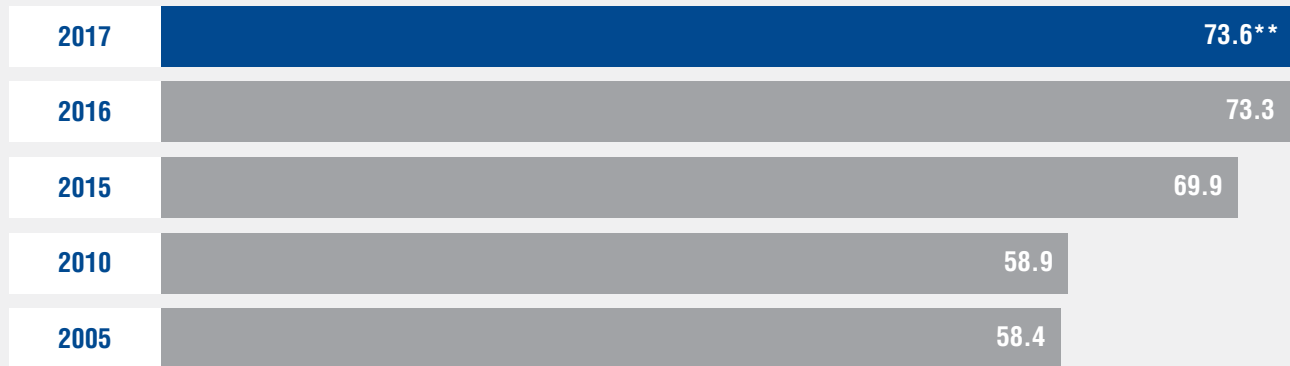
Expenditure



EUR **73.6** billion
The Germans
love the world

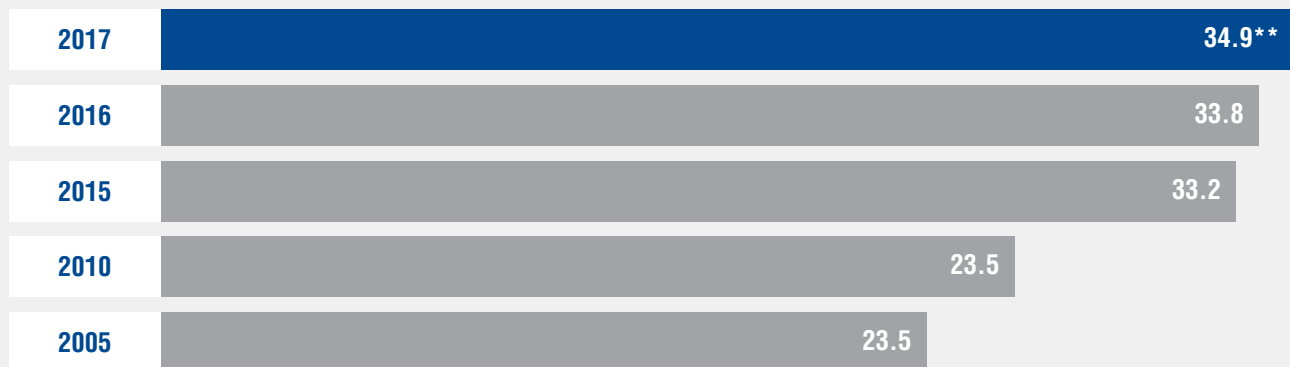
Expenditure of the Germans on their trips abroad

Expenditure in EUR billion



Income of Germany from international travel

Income in EUR billion

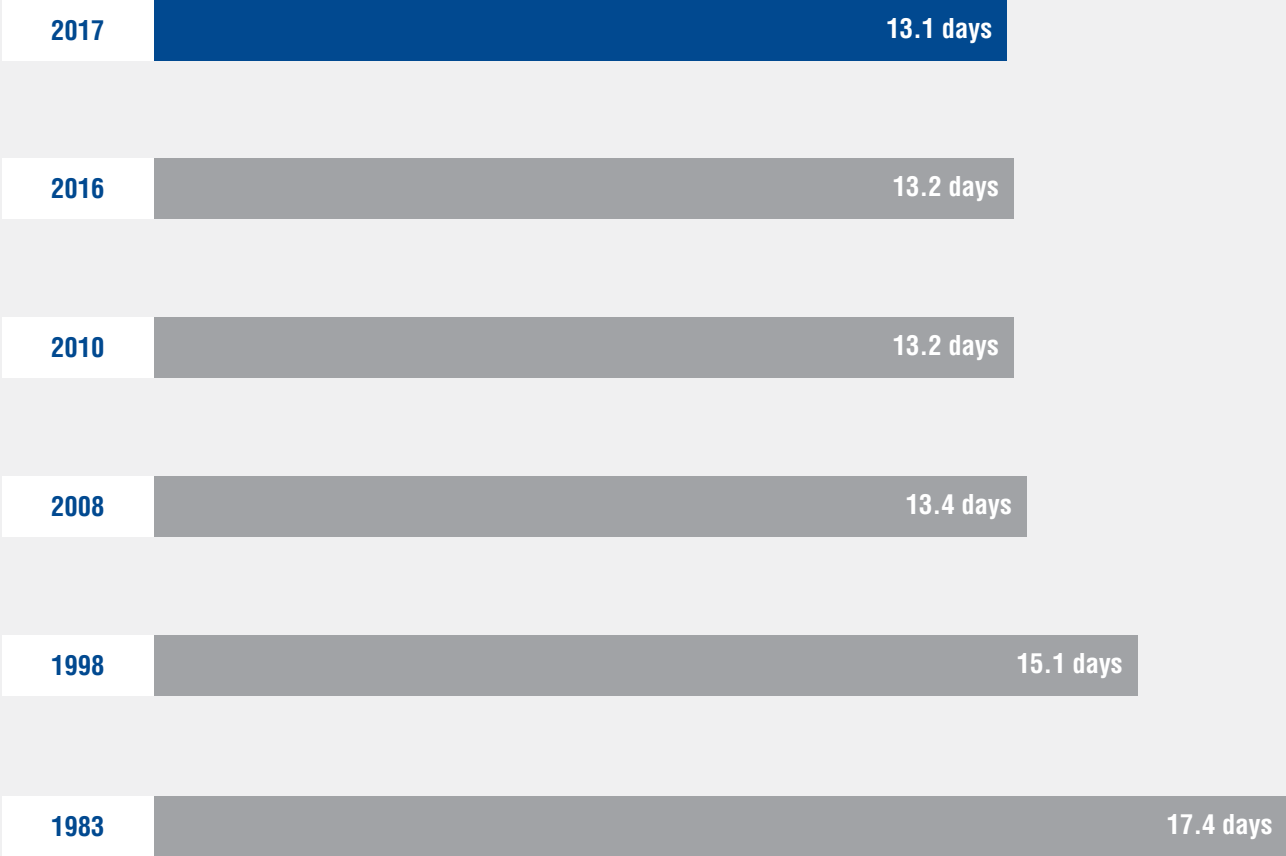


Average travel duration in 2017



What is the average duration of a holiday trip?

Duration of stay in days

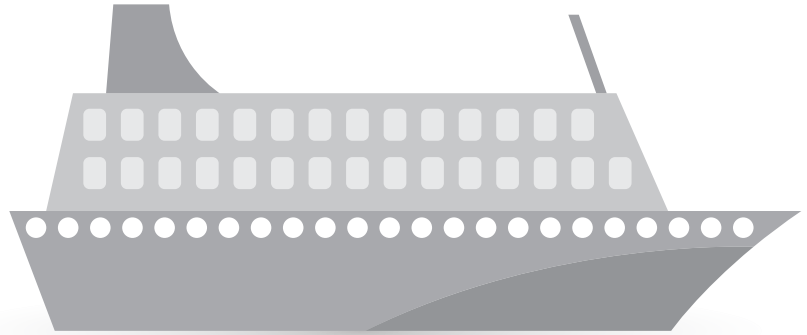


Source including graphics on page 16: RA Reiseanalyse 2018

Booming market cruises: an increasing number of passengers on rivers and seas

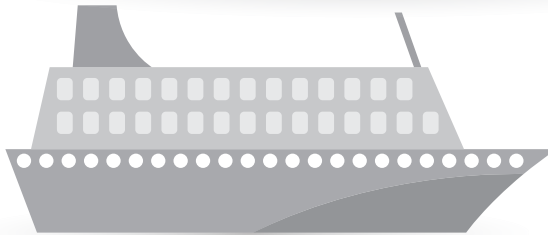
2.7 million

in 2017



1.7 million

in 2010



965,000

in 2005



567,000

in 2000



309,000

in 1995



870 %

The cruise market in Germany

The most popular destinations

- Ocean Cruises – Mediterranean region, Northern and Western Europe (including Baltic Sea)
- River Cruises – Rhine, Danube

Ocean cruises	2016	2017
Number of passengers	2,018,142	2,188,473
Average travel duration	8.9 nights	8.9 nights

River cruises	2016	2017
Sales revenues	EUR 449 million*	EUR 501 million*
Number of passengers	435,586	470,398
Average travel price	EUR 1,030*	EUR 1,065*
Average travel duration	6.9 nights	6.8 nights

Sources including graphics on page 20: DRV cruise market study (various years); ocean cruise numbers – CLIA Germany, river cruise numbers – IG River Cruise
 *Sales revenues without travel to departure port: ticket income from/to harbour.

German Travel Association
The voice of the travel industry

As a top-level association, DRV represents the travel industry in Germany. As a leading lobby we safeguard, more particularly, the interests of tour operators and travel agents. DRV is supported by a significant economic strength: our Members represent the largest part of the turnover on the tour operator and travel agent market. Several thousand member companies, including many tourism service providers, turn DRV into a strong community which pools many different interests – driven by the idea "The voice of the travel industry."

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