



THE GERMAN TRAVEL MARKET

Facts and figures 2019

THE VOICE OF THE
TRAVEL INDUSTRY

Der deutsche Reisemarkt

INHALTSVERZEICHNIS

2019

ALLGEMEINES

4

BTW Tourismusindex Winter 2019

Beitrag der deutschen Touristen zur wirtschaftlichen Entwicklung in Entwicklungs- und Schwellenländern

Tourismus als Wachstumsbranche der deutschen Wirtschaft

Die wirtschaftliche Bedeutung der Tourismusbranche im Überblick

Marktstruktur im deutschen Touristikmarkt 2019

Die Online-Offline-Umsatzentwicklung von Urlaubs- und Privatreisen

Veränderung der Urlaubsbuchungen durch das Internet

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Die Reiseeinnahmen und Reiseausgaben der Deutschen

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Die Kurzurlaube im In- und Ausland der Deutschen

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GESCHÄFTSREISEMARKT

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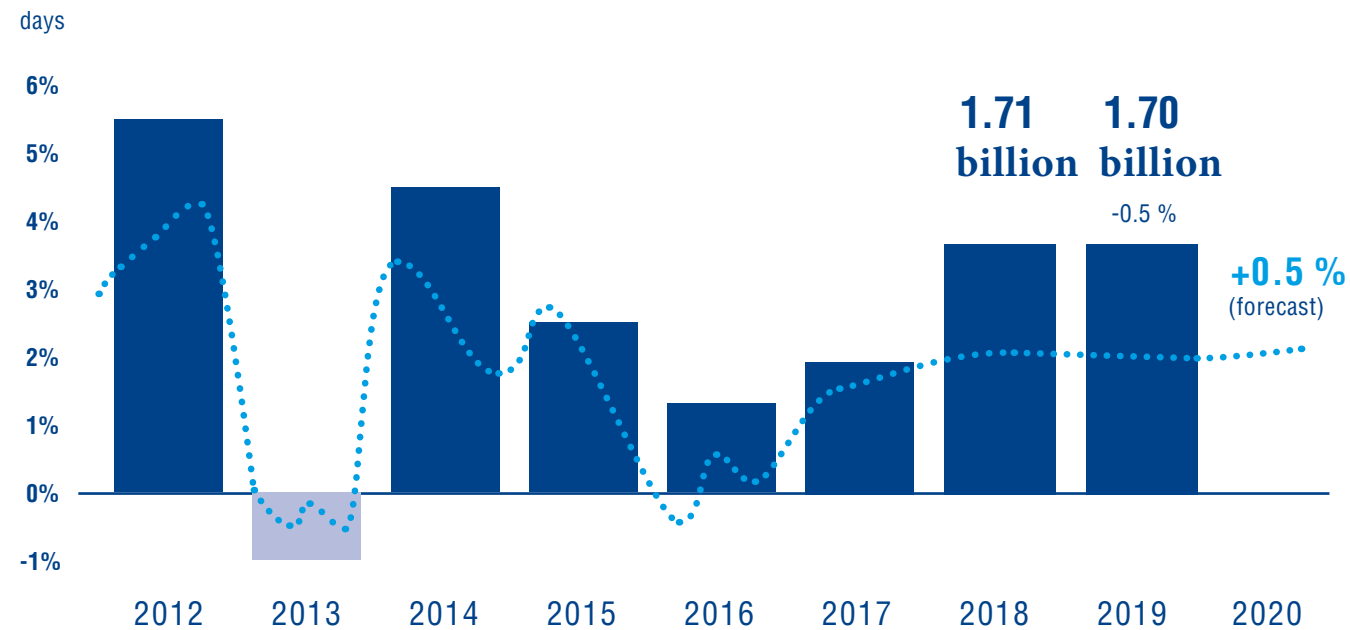
Entwicklungen im deutschen Geschäftsreisemarkt bis 2018

Top 5 Kongressländer weltweit 2018

Ranking Kongressstädte weltweit

BTW TOURISM INDEX Winter 2019

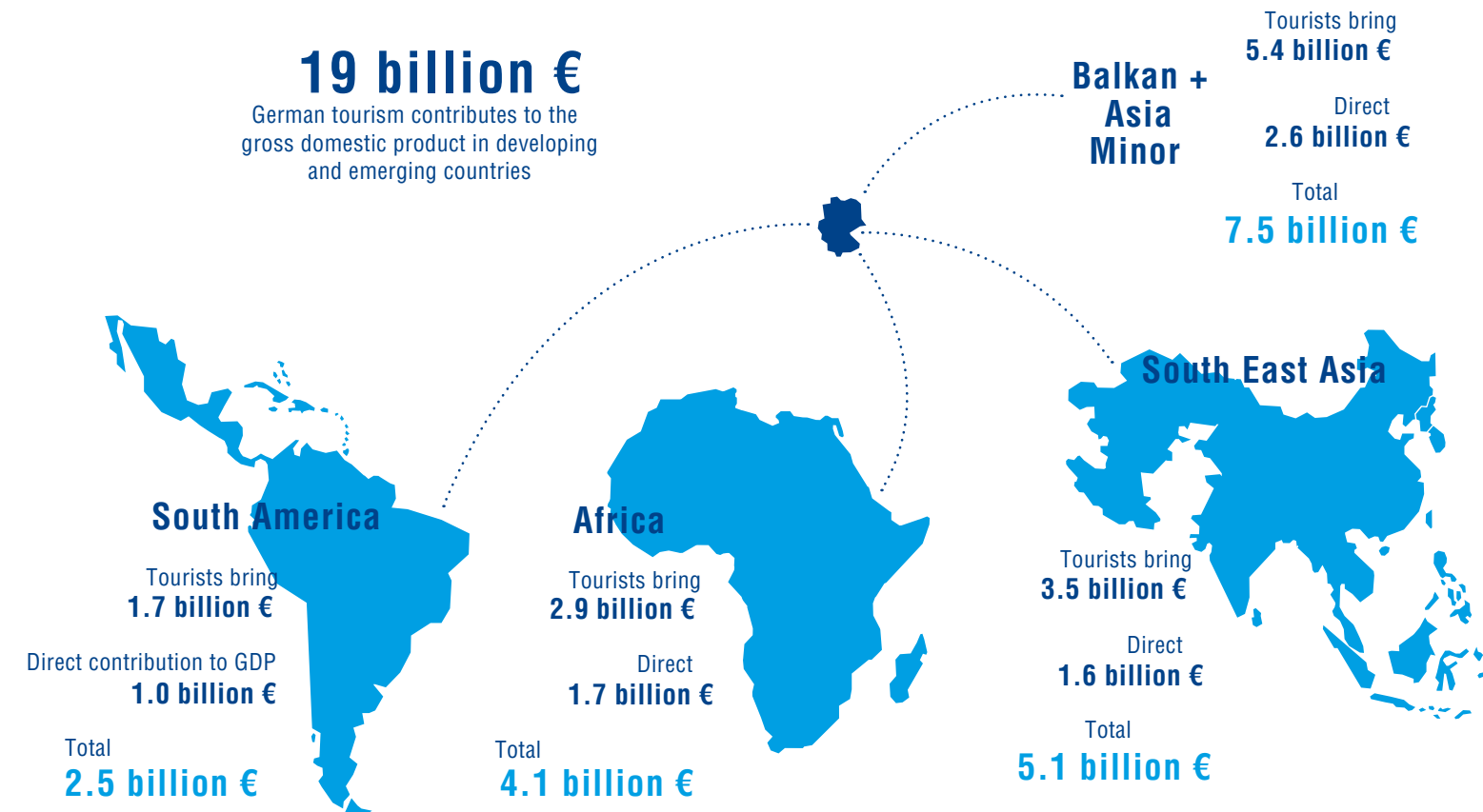
In 2019, Germans spent around 1.7 billion days on excursions and longer journeys. This is shown by the current tourism index of the BTW. This is a slight decrease of 0.5 percent compared to the previous year.



••• Germans' willingness to spend in travel days (forecast)
● Change in the number of travel days actually completed in % compared with the previous year

Contribution of German tourists to ECONOMIC DEVELOPMENT in developing and emerging countries

Reading 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.



Tourism as a **GROWTH INDUSTRY** in the German economy

The tourism industry secures almost three million jobs.

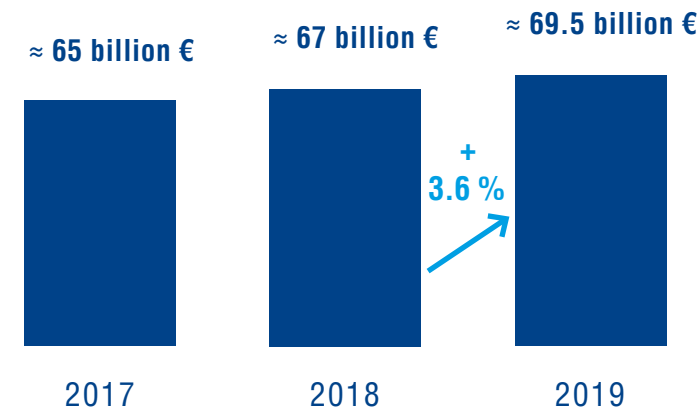
The tourism industry secures and creates jobs and provides for extensive additional investments. According to the study "Economic Factor Tourism", the gross value added* of the tourism industry amounts to over 105 billion euros.

Taking into account indirect and induced effects, the total gross value added attributable to tourism amounts to 213.5 billion euros. The tourism industry secures 2.9 million jobs in Germany.

Total consumer spending by tourists in Germany amounted to 287.2 billion euros in 2015, including 224.6 billion euros from domestic tourists alone.

In 2019, Germans will again be among the largest net foreign exchange earners in international travel. Travel expenditure abroad corresponds to 4.6 percent of the total private consumption of German citizens (2018: 4.7 percent).

Five percent increase: German travel expenditure rises significantly



* Gross value added: indicates the total value of all goods and services produced, less so-called intermediate consumption. These are all goods and services processed or consumed during production. Indirect effects capture the gross value added of intermediate consumption suppliers. Induced effects arise from the expenditure of additional income resulting from direct and indirect effects.

Source Text: Deutsches Institut für Wirtschaftsforschung, Statistisches Bundesamt, own calculations

Source Graphic: GfK Mobilitätsmonitor (Services booked before departure for holiday and private trips with at least one overnight stay)

The **ECONOMIC IMPORTANCE** of the tourism industry at a glance



70.8 million

holiday trips
(of which > 40% are package tours and building blocks organised with the help of tour operators/travel agencies)



more than

50 %

of the tour operator trips the Germans book in the travel agency



2.300

tour operators in Germany



55.2 million

Passengers on holiday trips of 5 days or more (previous year: 54.1 million)



1.3

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



78.2 %

Travel intensity (percentage of population travelling)



2.9 million

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



495.6 million

Overnight stays by residents and non-residents in Germany in 2019



≈26 %

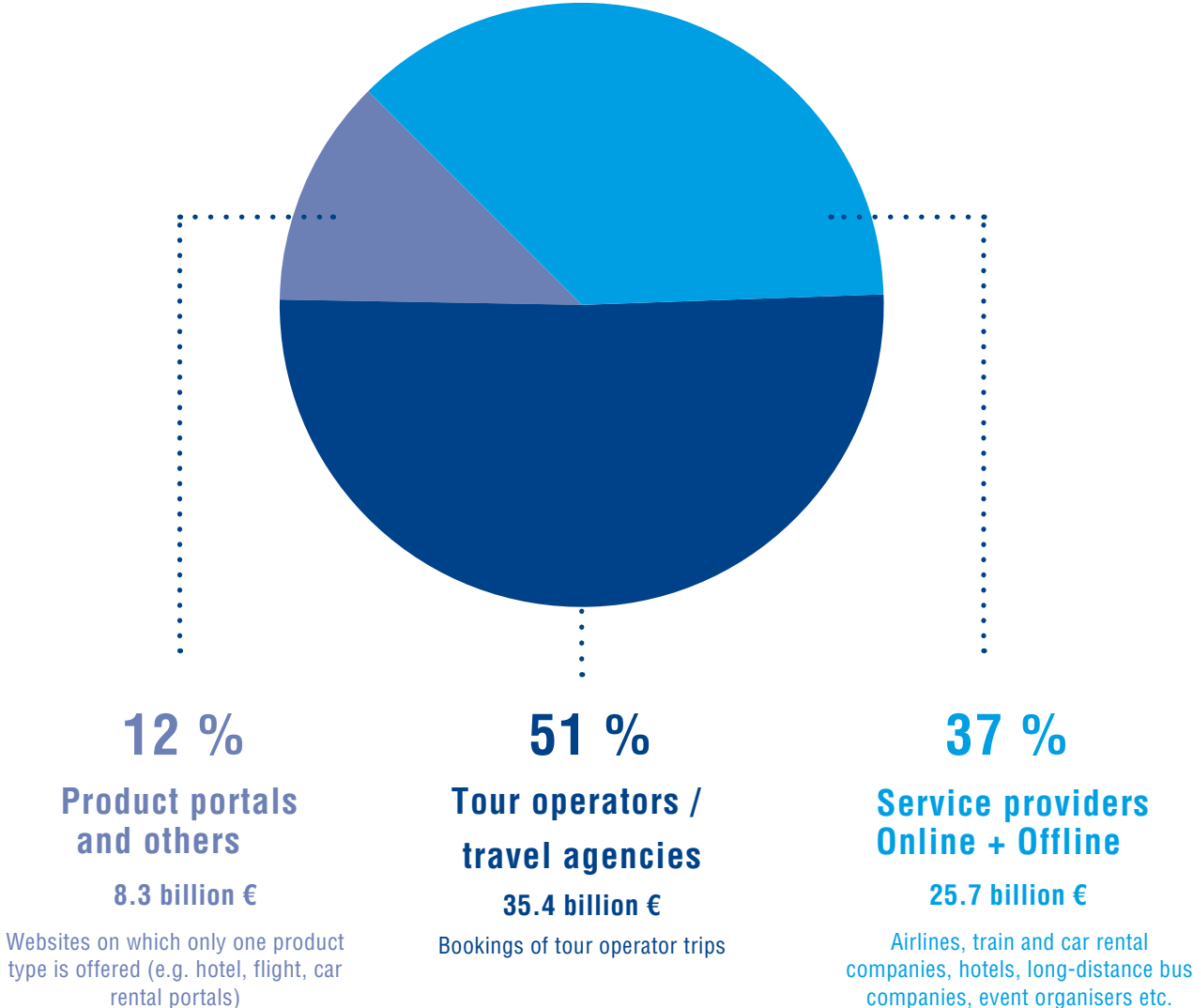
of the journeys of German citizens have Germany as their destination. (74 % go abroad, of which 8.4 % are long-distance trips).*

Sources: DRV-Vertriebsdatenbank, Bundesverband der Deutschen Tourismuswirtschaft, Statistisches Bundesamt, Forschungsgemeinschaft Urlaub und Reisen Reiseanalyse 2020

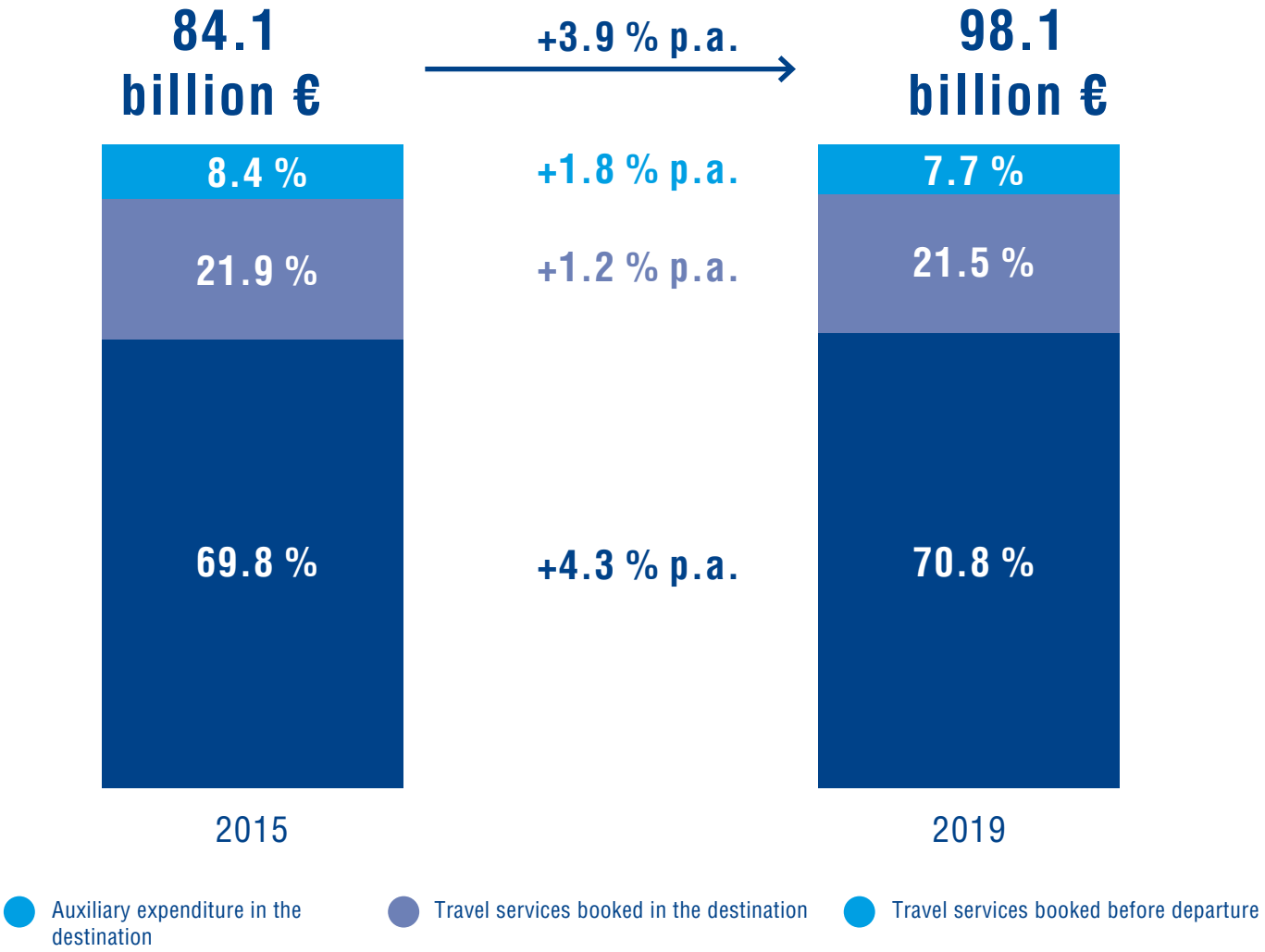
* The remainder is divided 2/3 between Mediterranean destinations and 1/3 between travelling by car to neighbouring countries.

Market structure in the GERMAN TOURISM MARKET

2019

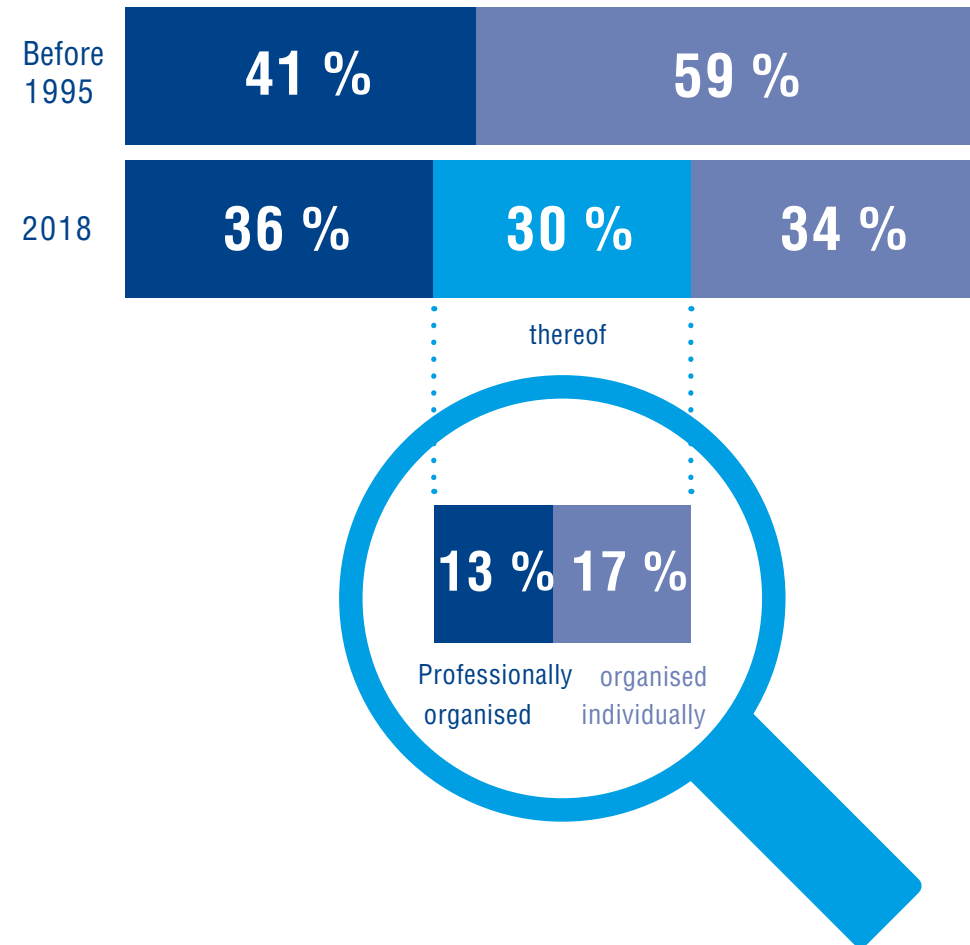


Distribution of total expenditure on private and holiday travel of German private households with at least one overnight stay



Change in HOLIDAY BOOKINGS through the internet

Holiday bookings in comparison



Evaluations by the Forschungsgemeinschaft Urlaub und Reisen (FUR) clearly show that in the past 20 years the share of organised travel via travel agencies and tour operators has increased significantly. Whereas in the pre-Internet age (1995) 41% of all holiday trips were booked via tour operators and travel agencies, in 2018 a total of 49% of all trips were purchased as professional tour operator trips both from stationary travel agencies and online.

The interesting thing is: The completely individually and on your own organized holiday loses of importance. Whereas in 1995, 59 percent of all holiday trips were made without professional assistance - travellers either called the guesthouse/hotel or tourist office directly or simply set off without prior reservation - the proportion has now fallen to just 34 percent. The evaluations of the FUR show that many of these former individual travellers, who used to go on holiday spontaneously without planning, now book their travel in advance on the Internet.

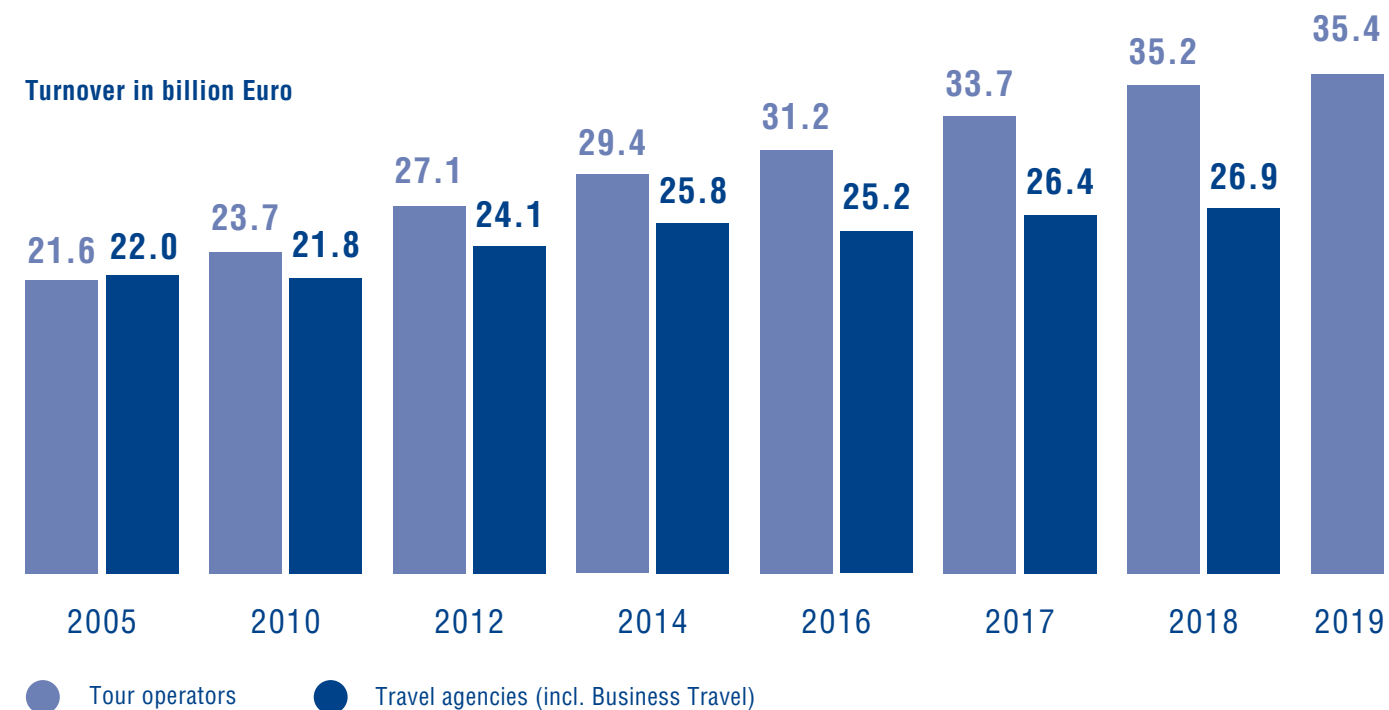
Conclusion:

The growth in internet booking figures will be generated primarily from the segment of previously individual organisers - and less from the segment of professionally organised travel.

TRAVEL AGENCY AND TOUR OPERATOR MARKET IN GERMANY



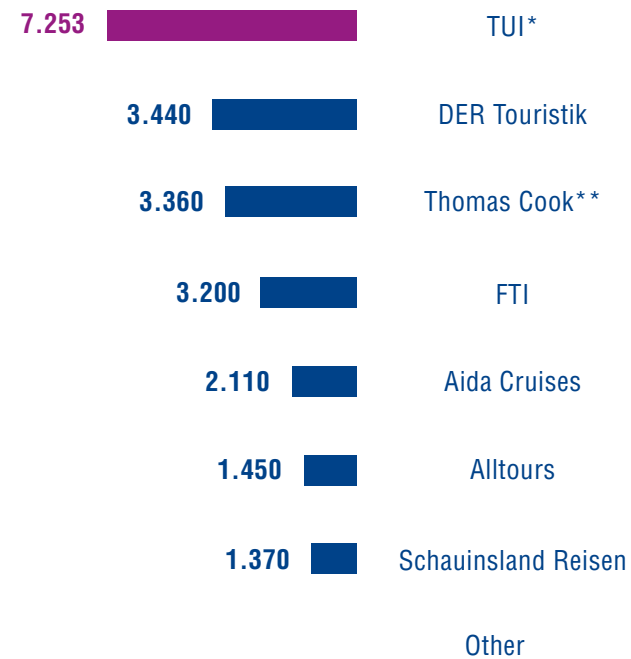
Development of the TOUR OPERATOR AND TRAVEL AGENCY SALES in Germany



Perfectly taken care of:
TOUR OPERATORS MARKET
 at a glance

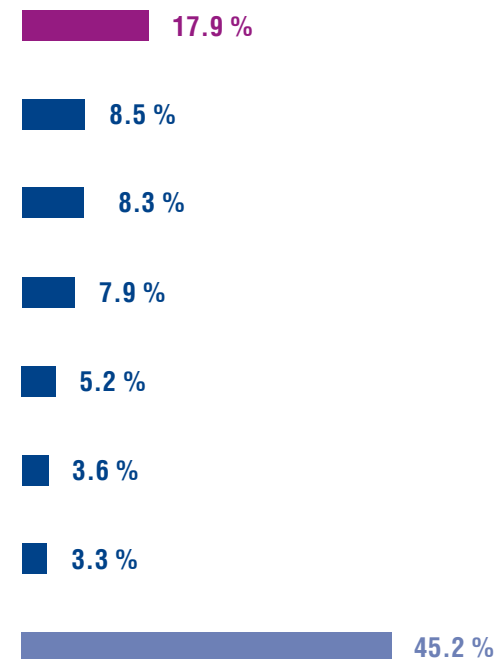
The largest tour operators in German-speaking countries

Sales in million euros in 2019



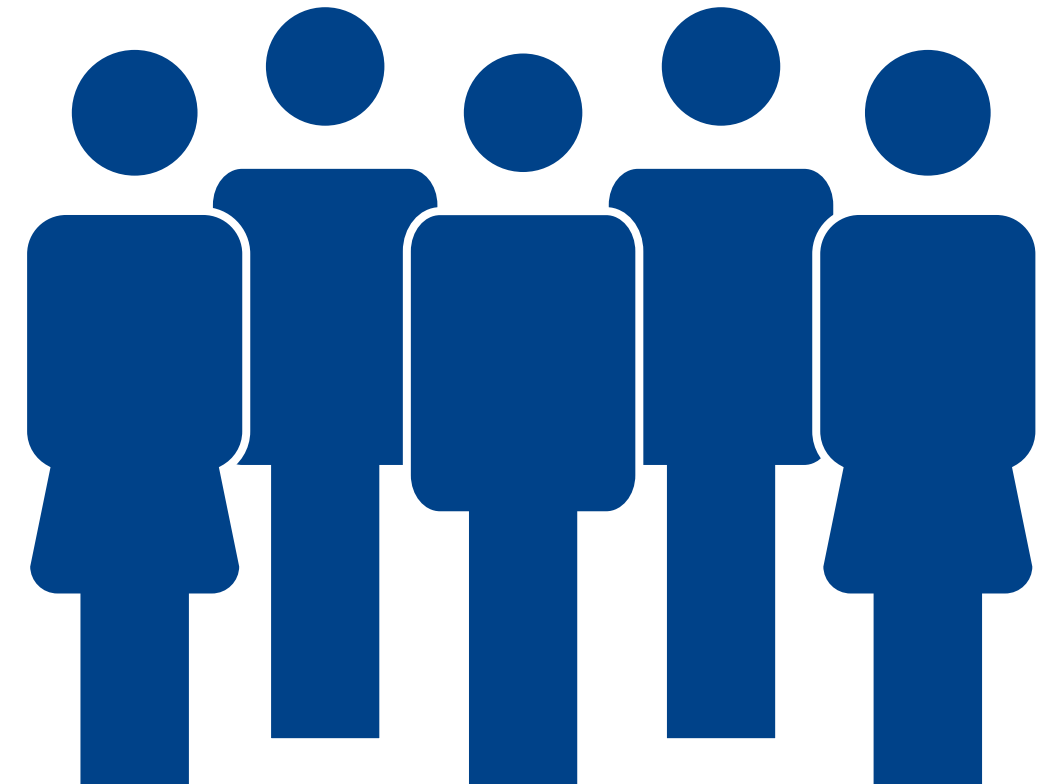
Tour operators' market shares

Based on the total turnover of the German tour operators in the German-speaking region (including Austria and Switzerland) in 2019 of 40.6 billion euros



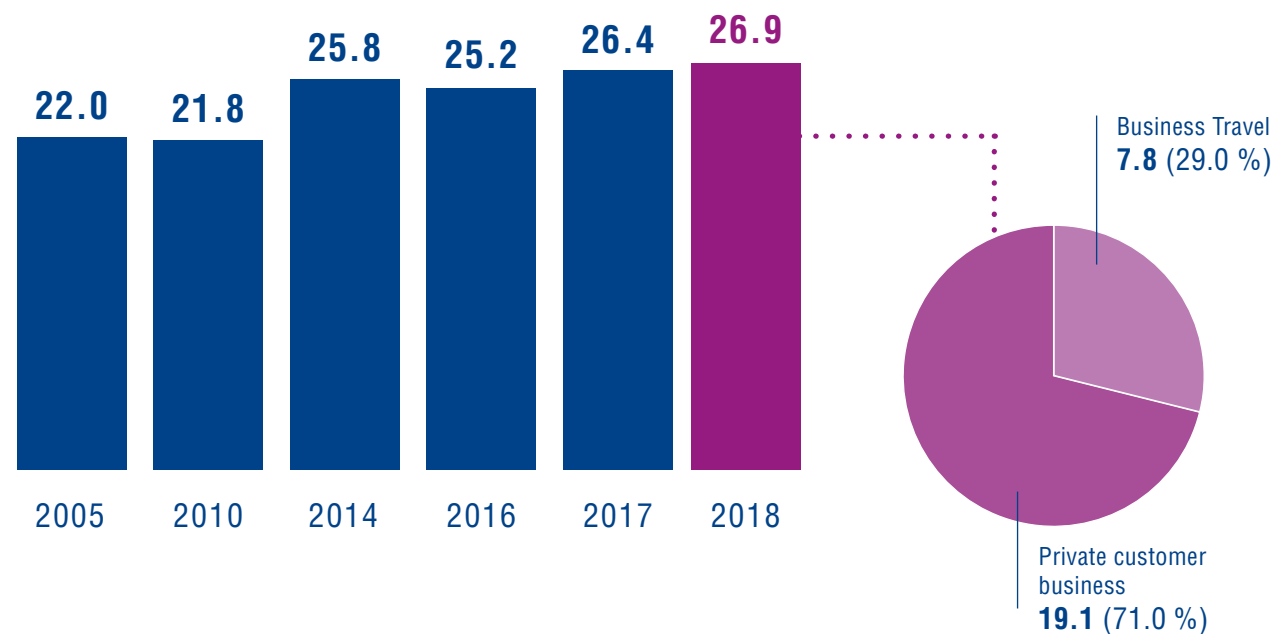
Employees of
TRAVEL AGENCIES AND TOUR OPERATORS
 duty to social insurance

In 2019, 71,368 (previous year: 70,897) employees of travel agencies and tour operators were subject to social security contributions.



Without
TRACEL AGENCY
it's not possible

Sales development in billion euros year-on-year
(holidays and business travel)

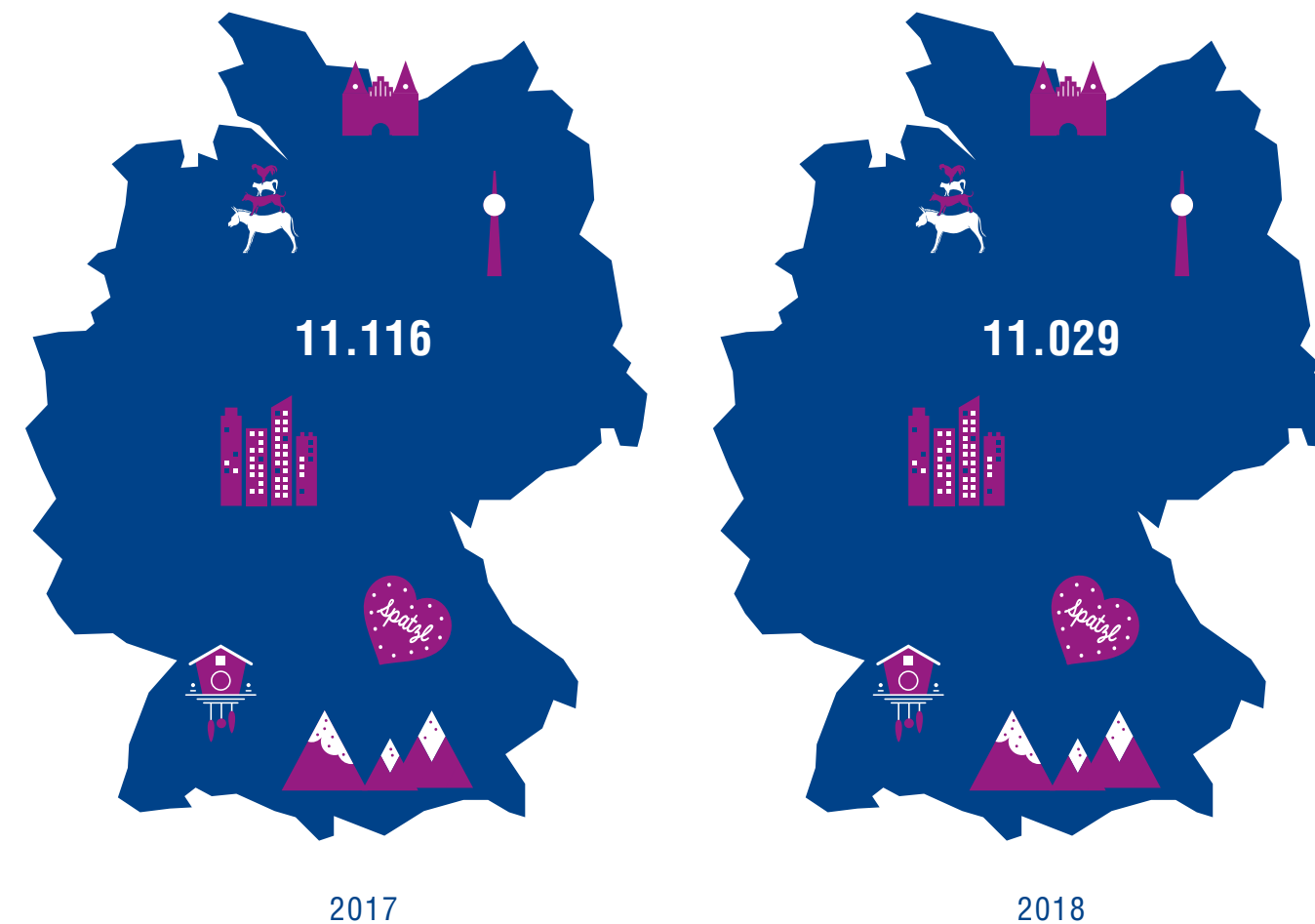


System-based distribution, 2018

Chain	19.4 %
Franchise	20.8 %
Cooperation	54.1 %
System-based distribution	94.3 %
Independent travel agencies	5.7 %

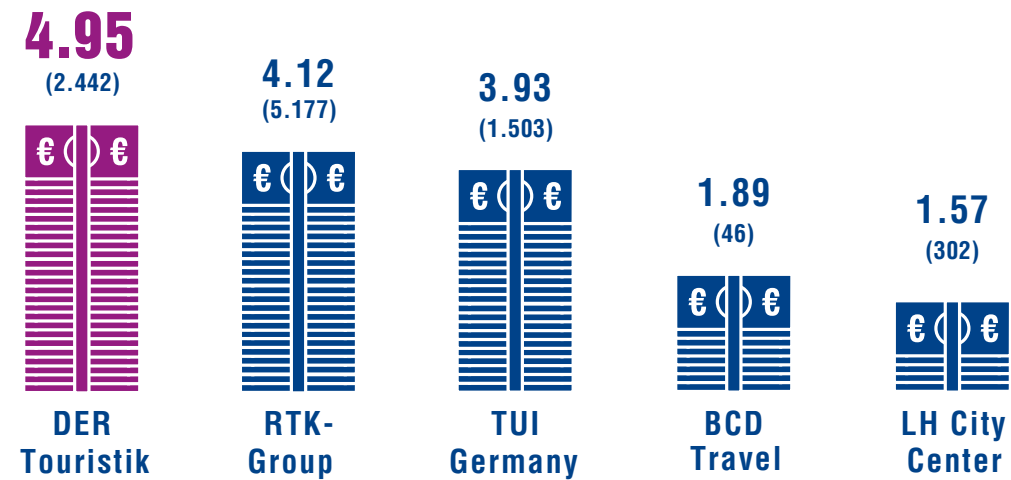
Total market 100 %

Number of
TRAVEL BOOKING OFFICES
in Germany



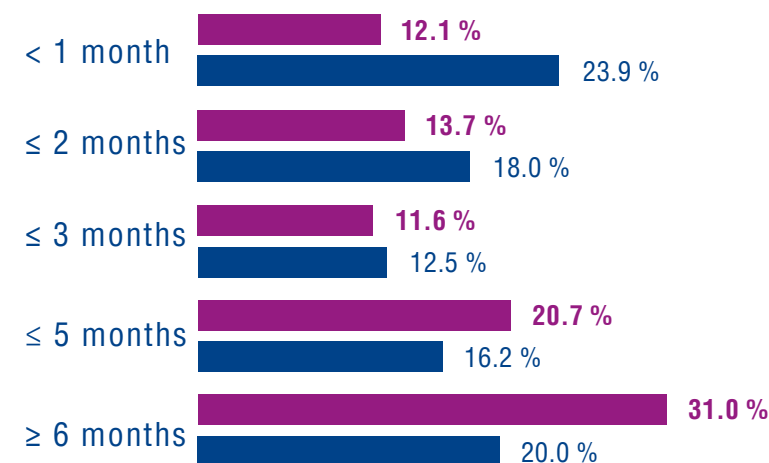
The 5 largest travel agency organisations 2018

Turnover in billion euros (sales outlets)



Share of early and late bookers 2018

in percent

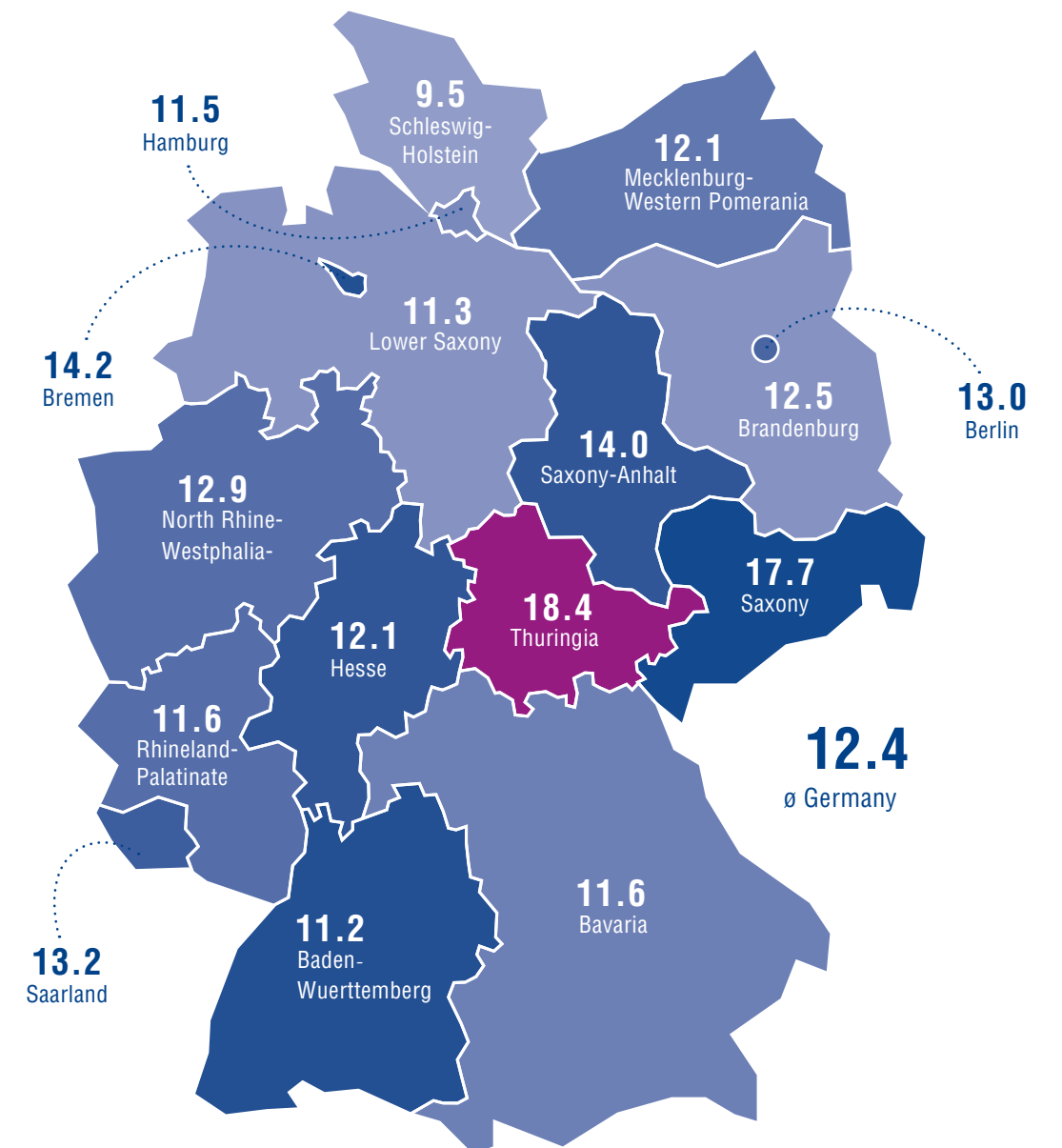


Trips booked at the agency were booked on average 117 days before the start of the trip, with online bookings lasting 86 days.

- at the travel agency
- Booked online

Travel agency density by federal states 2018

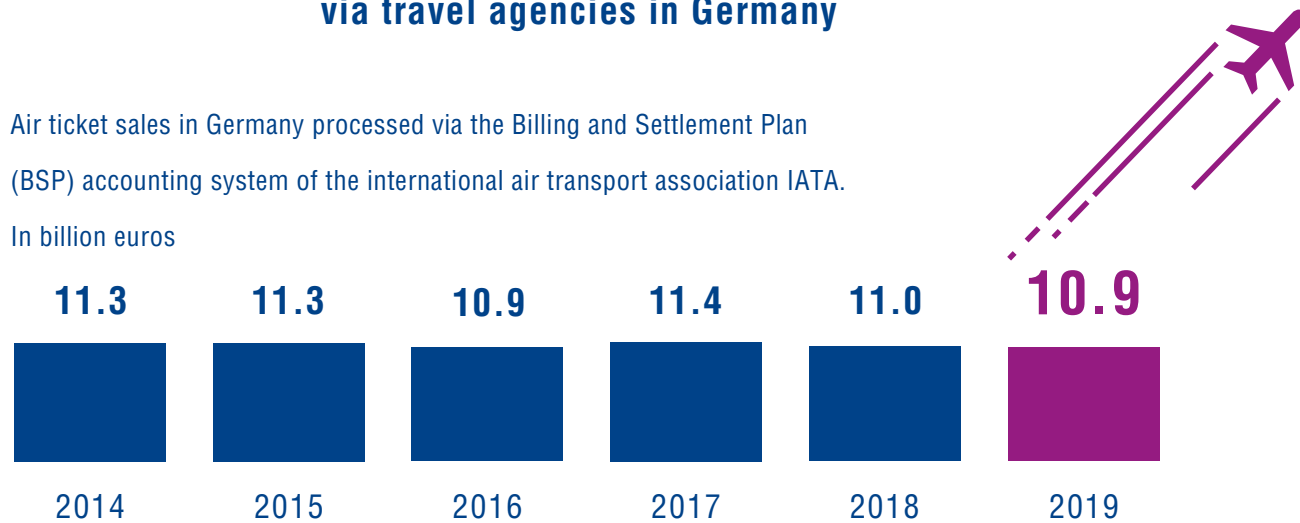
Number of travel agencies per 100,000 inhabitants



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.

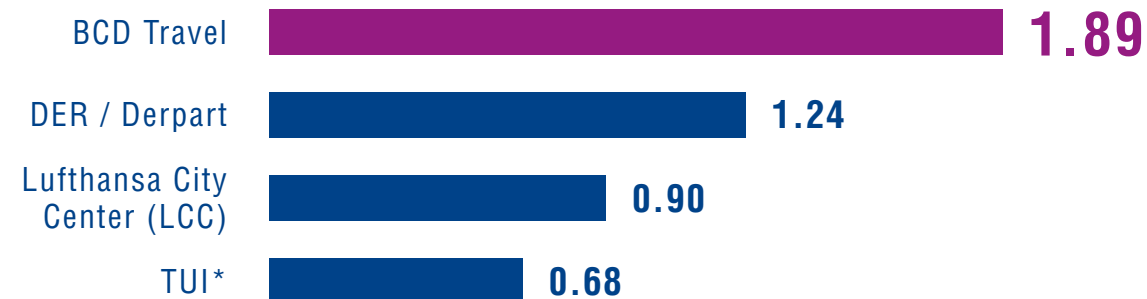
In billion euros



The largest travel agencies in the business travel segment in Germany

not listed are: American Express, HRG Germany, Carson Wagonlit (CWT) and Egencia, which do not publish figures. According to estimates, their turnover in each case is less than one billion euros.

Turnover 2018, in billion euros

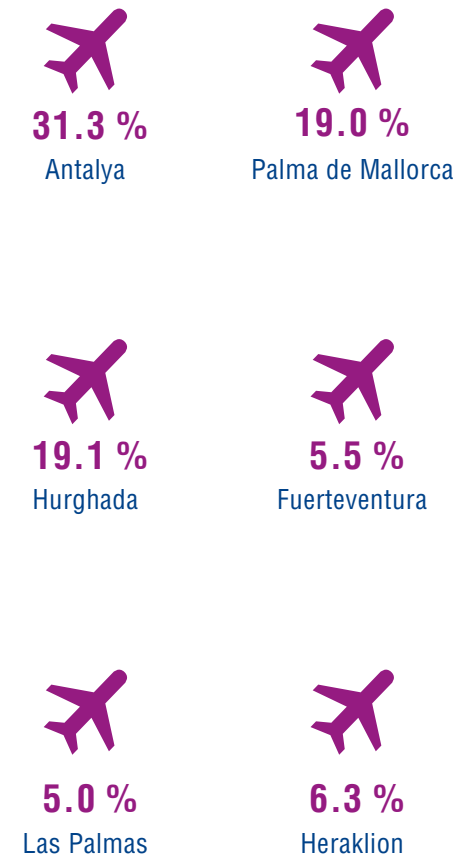


*TUI (First Business Travel plus corporate service revenues from leisure offices)

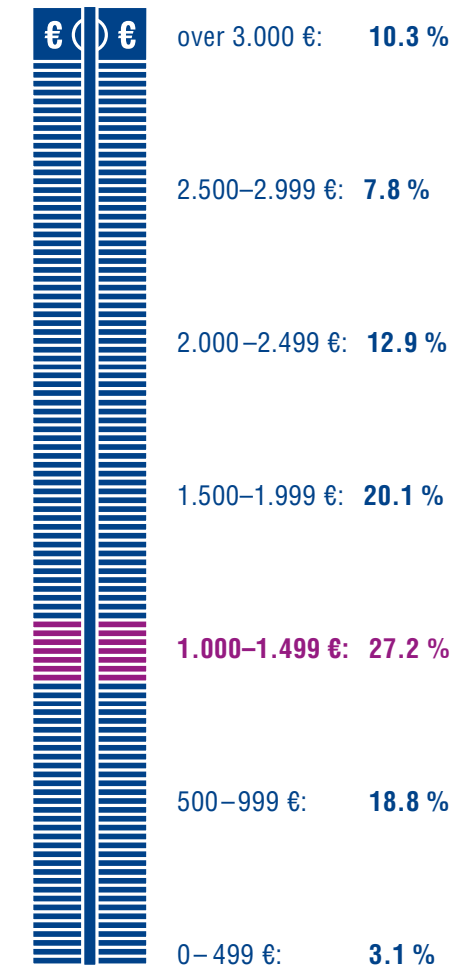
Sources: International Air Transport Association (IATA), FVW Dossier „Deutscher Reisevertrieb 2018“

The online travel market 2019

Main destination airports for online bookings (shares, mainly package tours)



How much do customers spend per online booking?



Sources: Amadeus Top 10 Analyse 2019

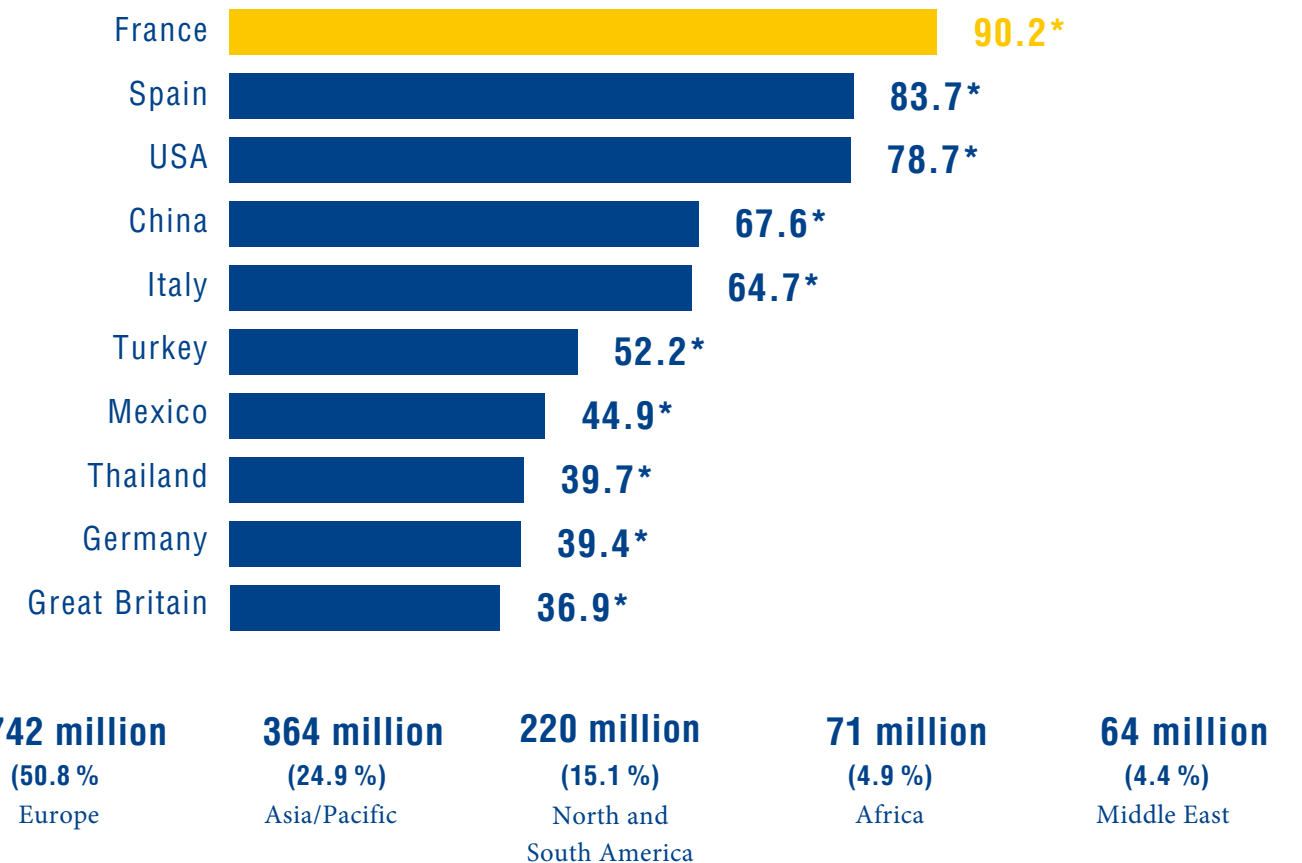
DESTINATIONS AT HOME AND ABROAD



The 10 most popular TRAVEL DESTINATIONS of all nations worldwide

In 2019, 1.5 billion (2018: 1.4 billion) international tourist arrivals were counted worldwide. This corresponds to an increase of 3.8 percent compared to 2018. As in many years before, France again counted the most visitors worldwide in 2019.

Visitors in 2019 in million

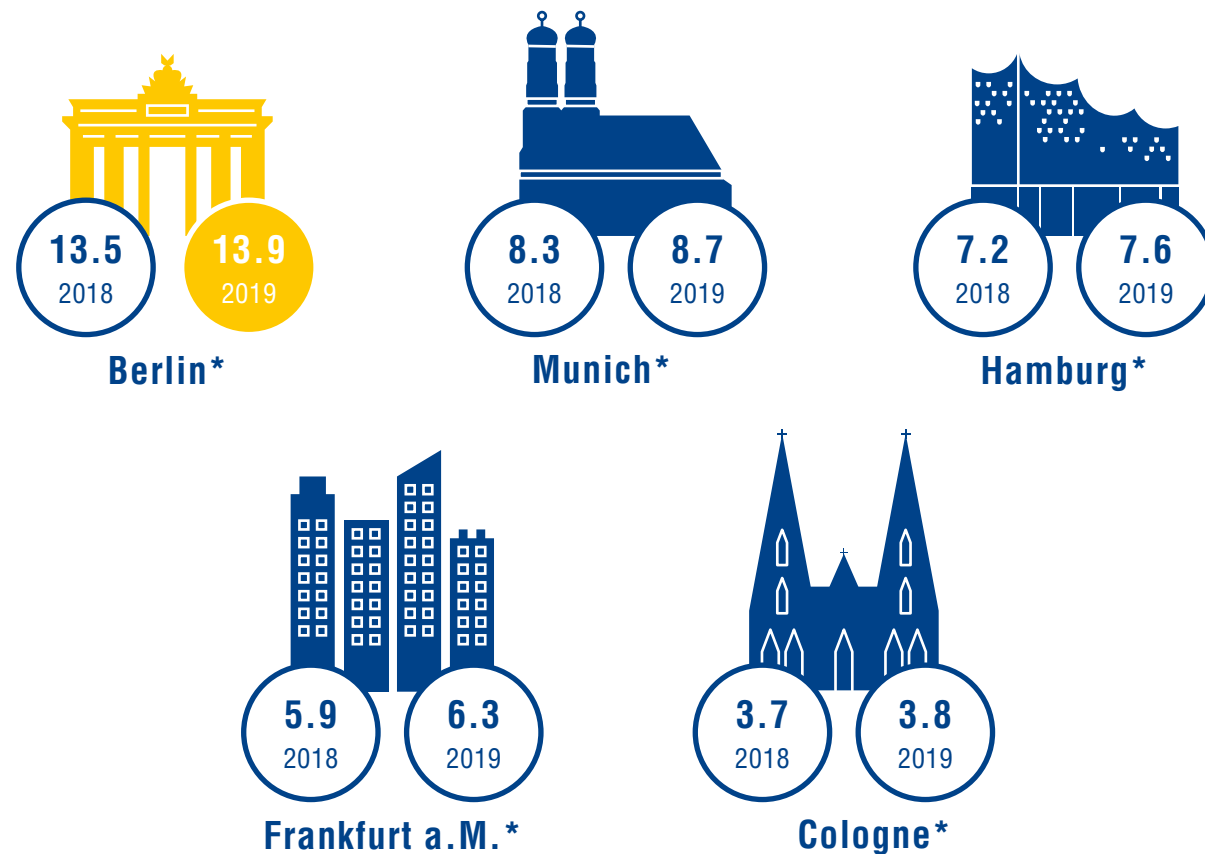


Source: UNWTO, *own projections

The 5 most popular CITY TRAVEL DESTINATIONS BY RESIDENTS AND FOREIGNERS in Germany 2019

Not only the international metropolises, but also Germany's cities have been attracting a growing number of travellers from all over the world for years. They have become popular cultural, event, leisure and shopping metropolises.

By guest arrivals, in million visitors



Source: Statistische Landesämter
*own projection

The HOLIDAY DESTINATIONS OF THE GERMANS worldwide

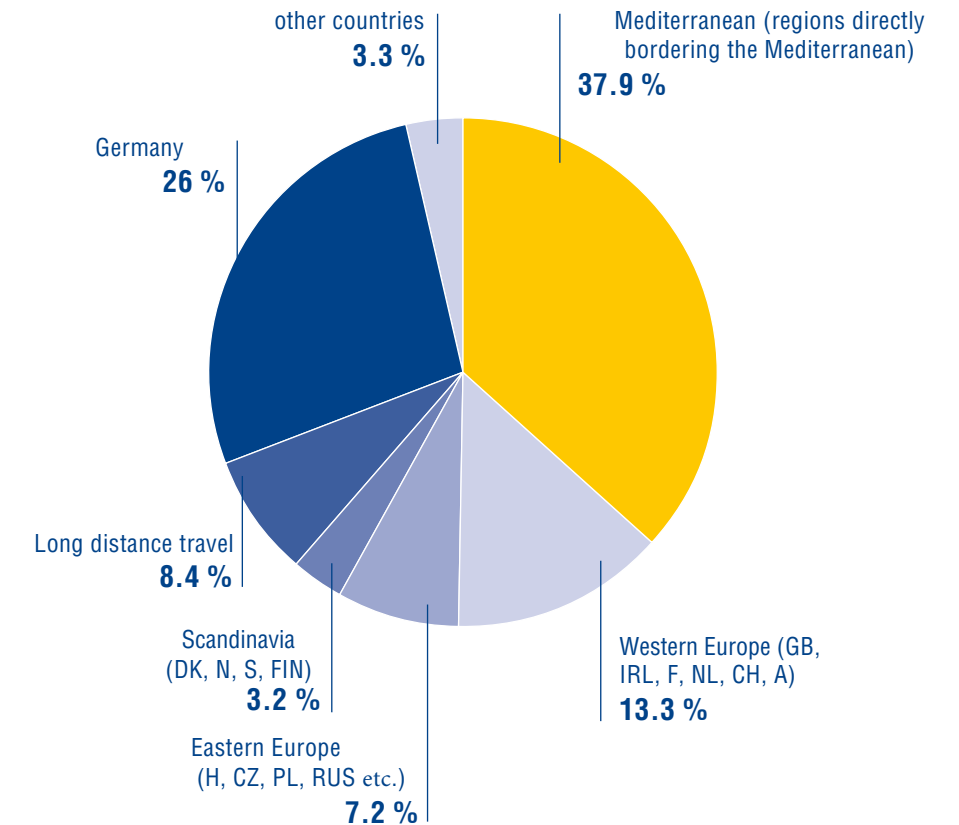
Number of holiday trips of five days or more 2019



70.8 million
long holiday trips of the Germans

73.6 %
thereof abroad

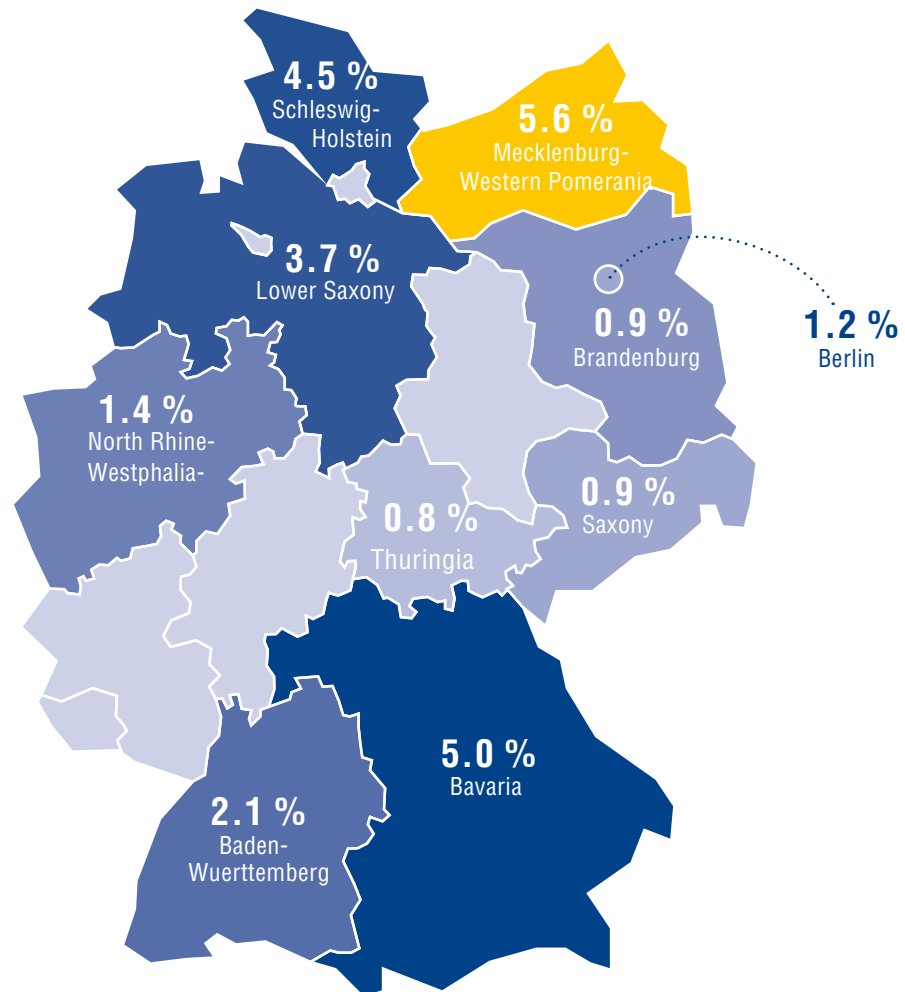
26.4 %
thereof Germany



Source: Reiseanalyse 2020

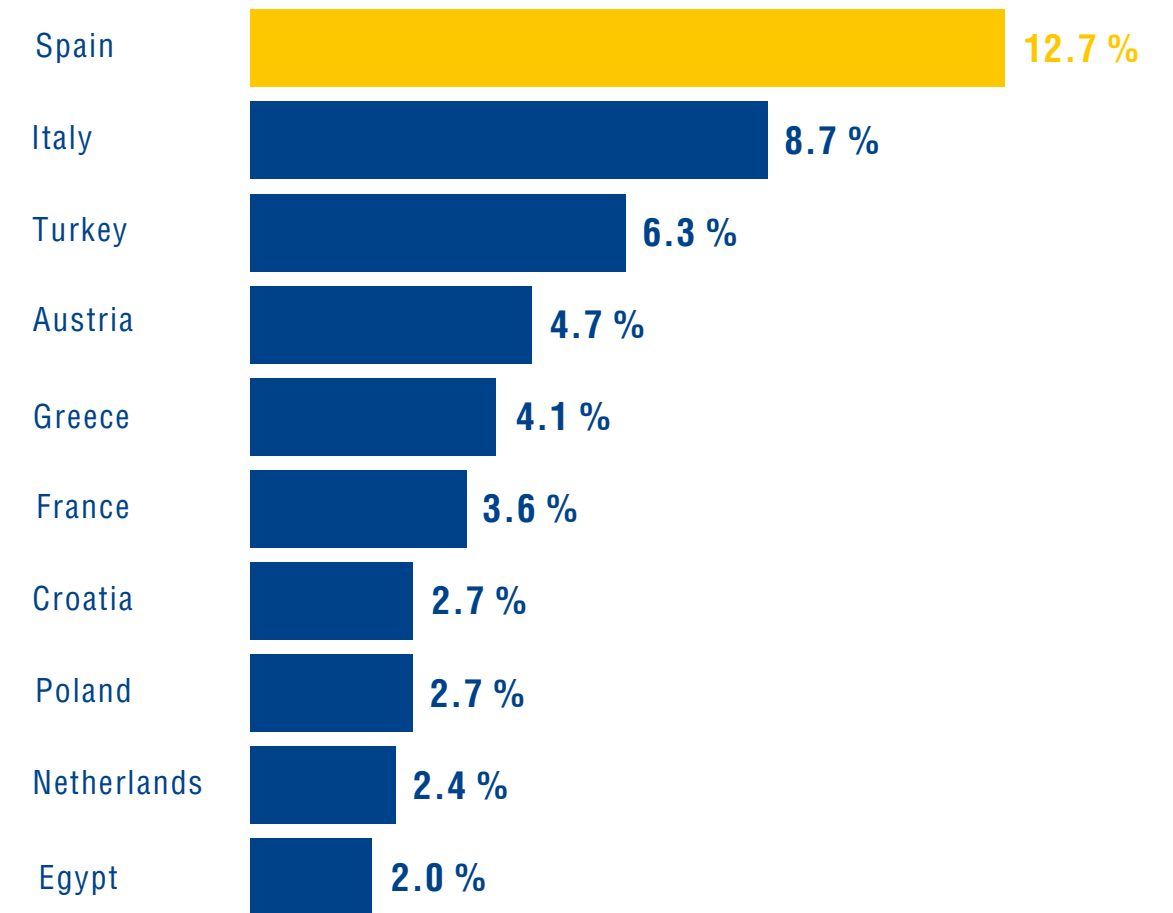
The 10 most popular DOMESTIC DESTINATIONS of Germans

Share of all holiday trips of five days or more 2019

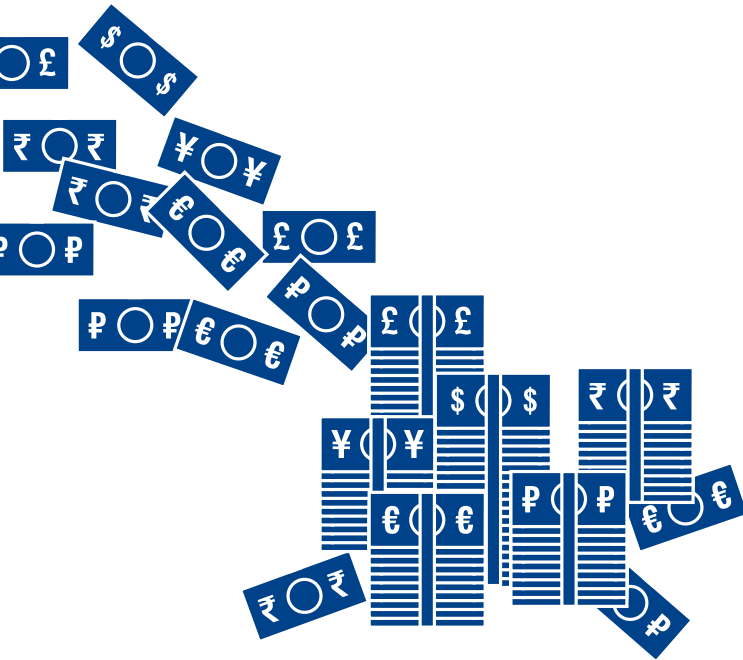


The 10 most popular FOREIGN DESTINATIONS of Germans

Share of all holiday trips of five days or more 2019



The TRAVEL INCOME AND TRAVEL EXPENSES of Germans



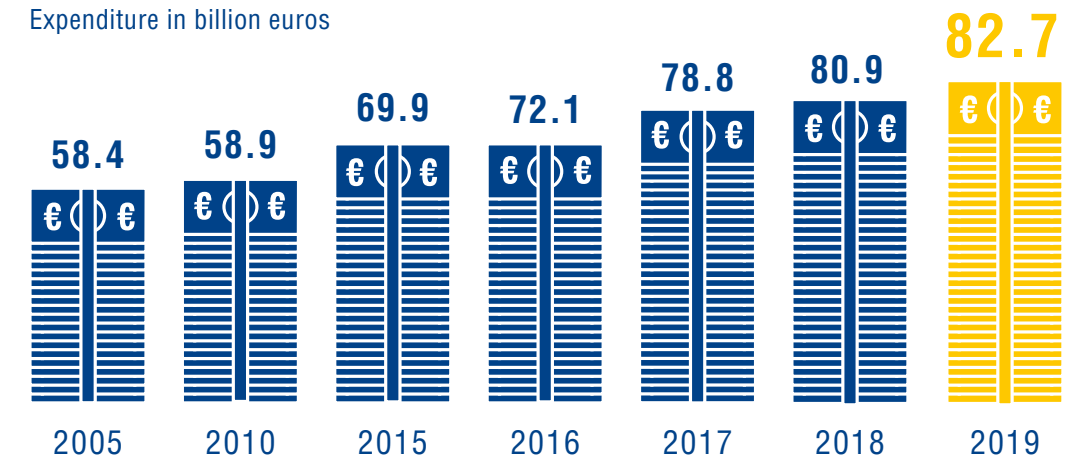
Income
36.5 billion €
 The world loves Germany



Expenses
82.7 billion €
 Germans love the world

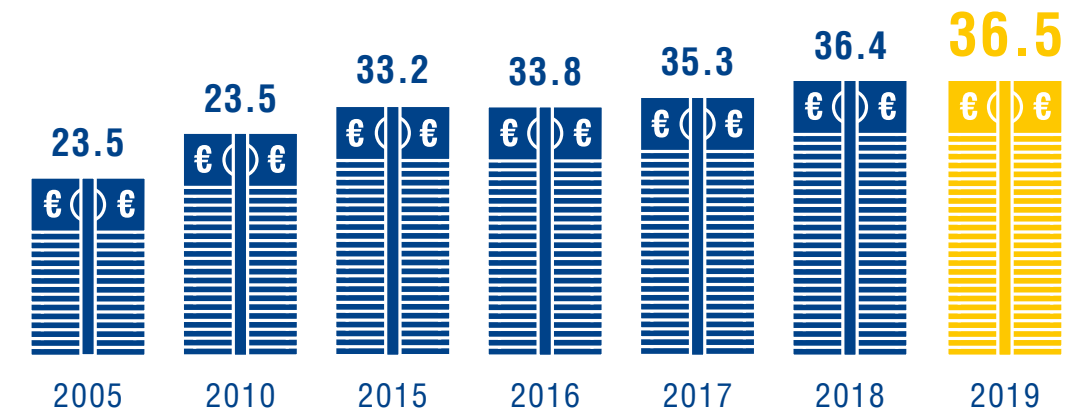
Expenditure by Germans on their trips abroad*

Expenditure in billion euros



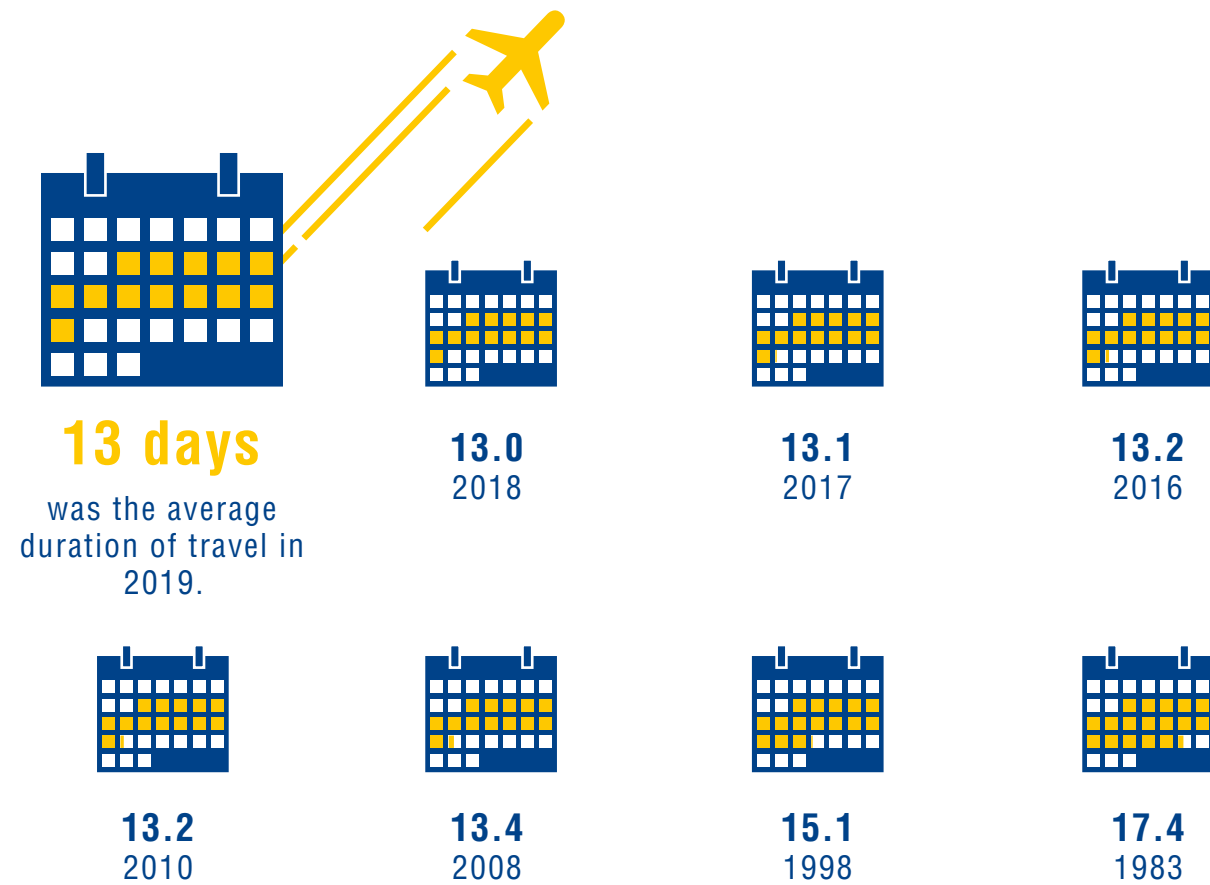
Germany's income from international travel

Income in billion euros



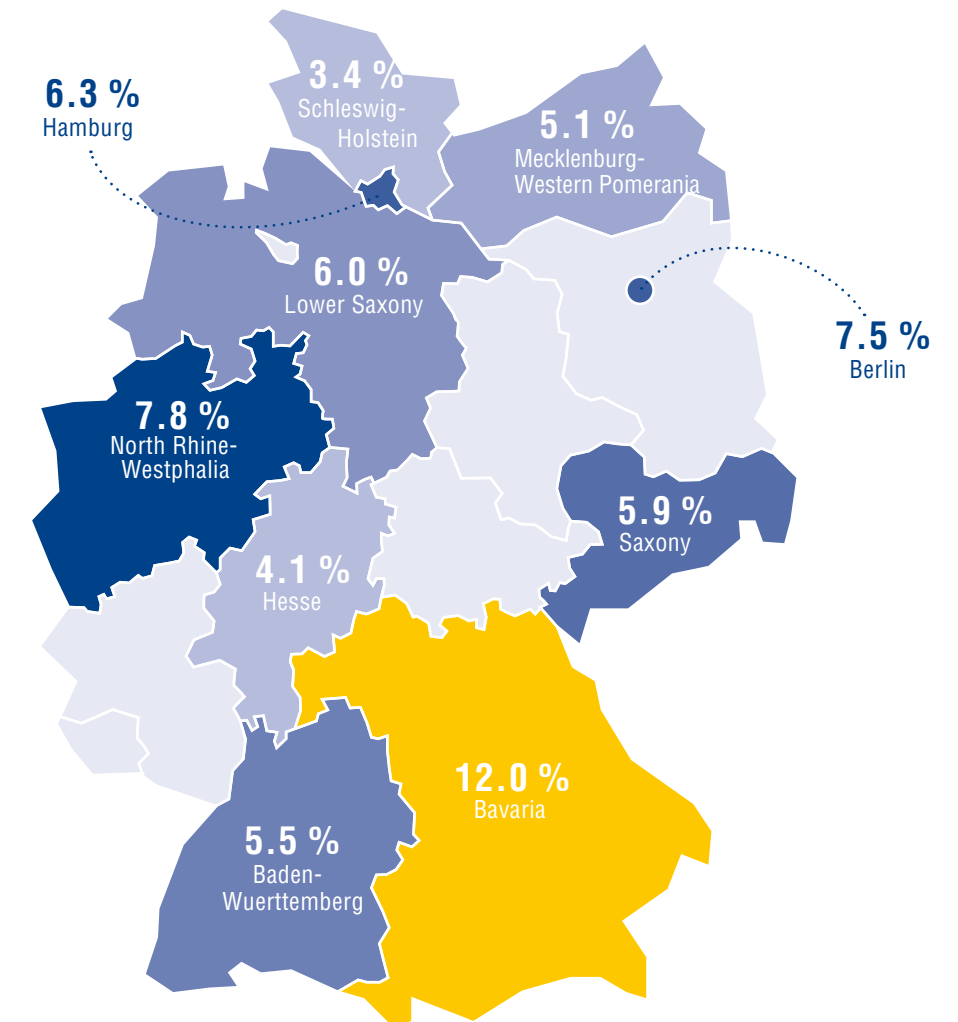
The average DURATION of main holiday trips

Ø length of stay in days (main holiday trips)



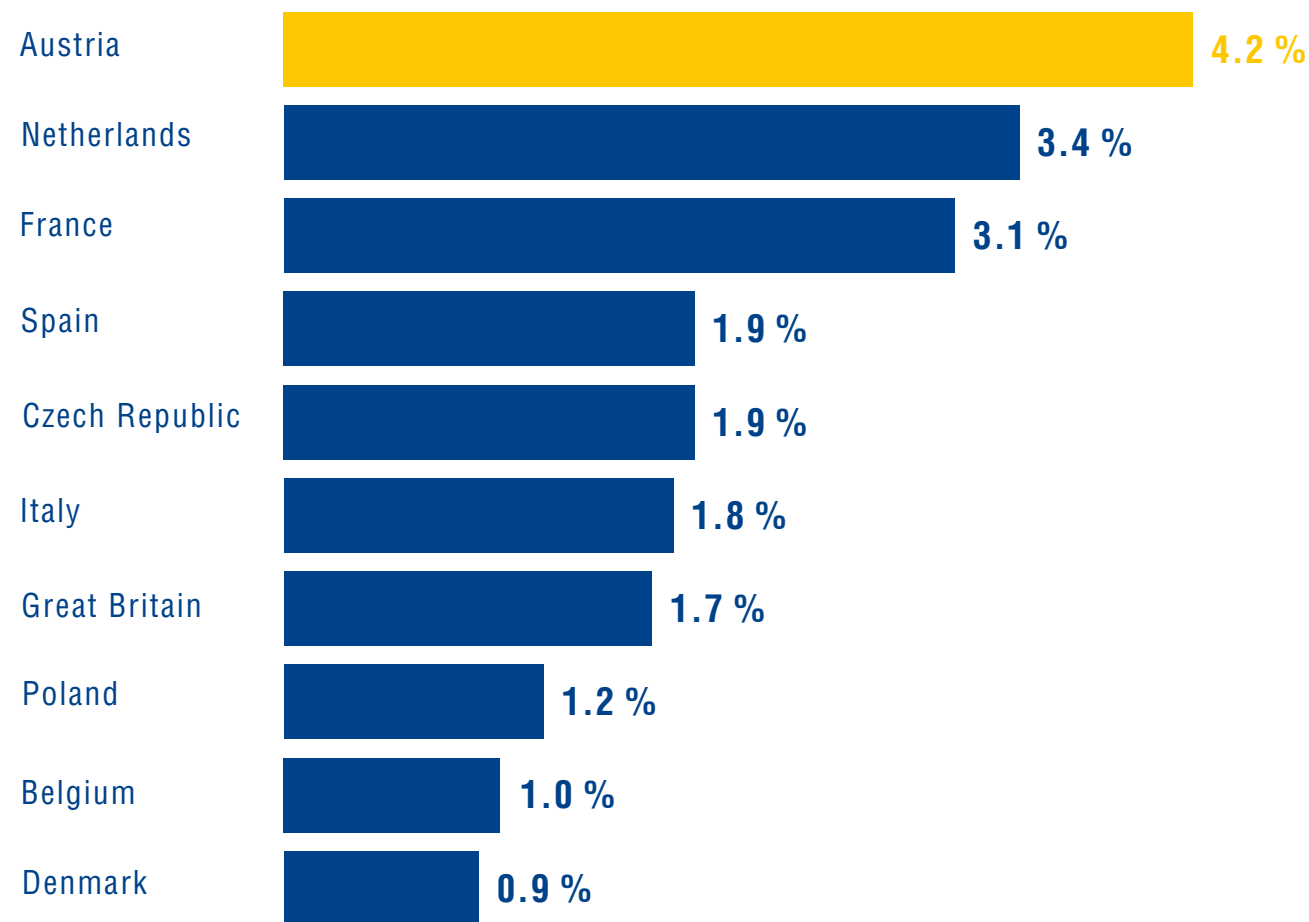
The 10 most popular SHORT TRIP DESTINATIONS for Germans in Germany

Share of all short breaks, travel duration two to four days 2019



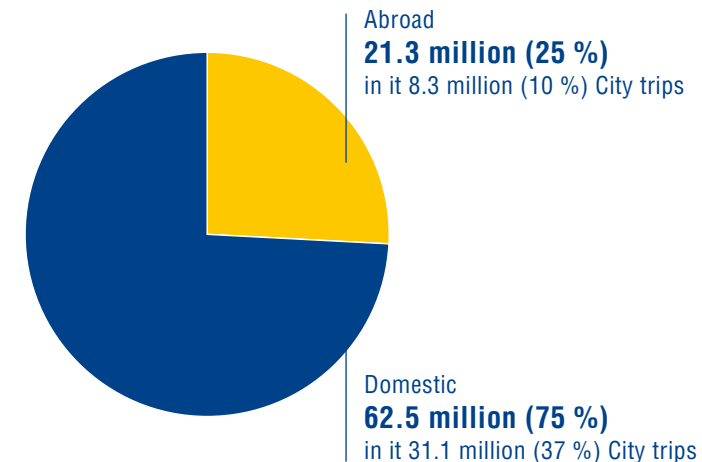
The 10 most popular SHORT TRIP DESTINATIONS of Germans abroad

Share of all short breaks, travel duration two to four days 2019



The SHORT BREAKS IN GERMANY AND ABROAD of Germans

Travel duration two to four days in 2019



83.8 million
total trips

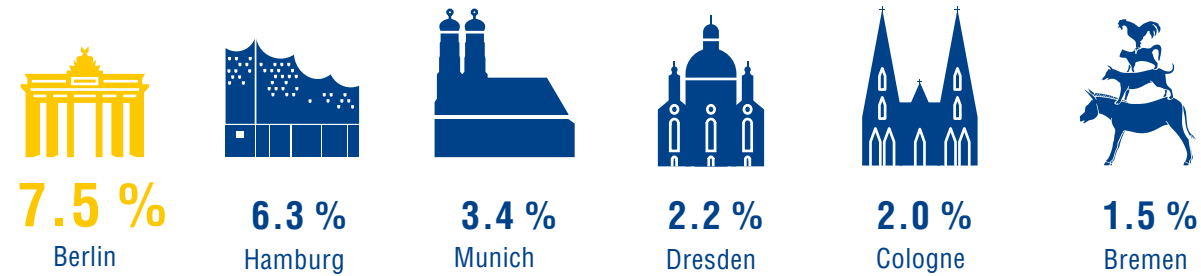
The day trips of Germans 2019

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

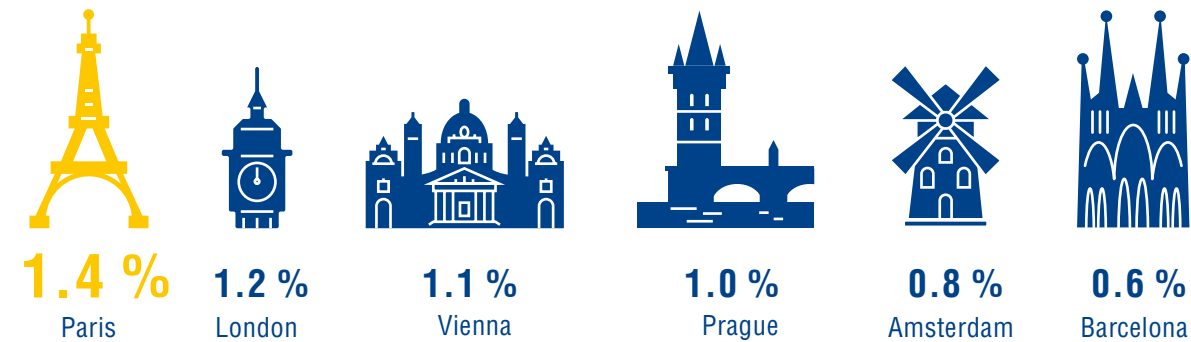


The most popular CITY DESTINATIONS of Germans

Domestic destinations: Share of all short breaks, travel duration two to four days 2019



Foreign destinations: Share of all short breaks, travel duration two to four days 2019

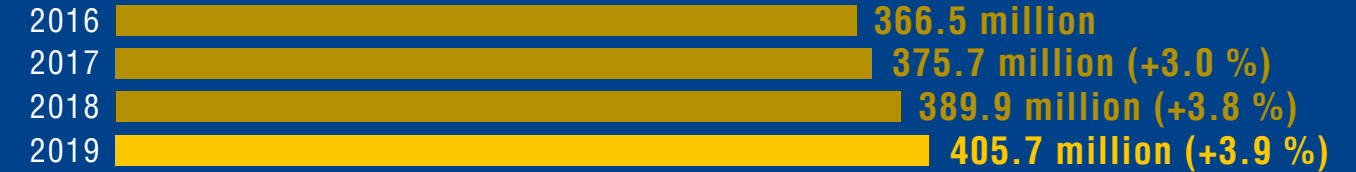


Source: Reiseanalyse 2020

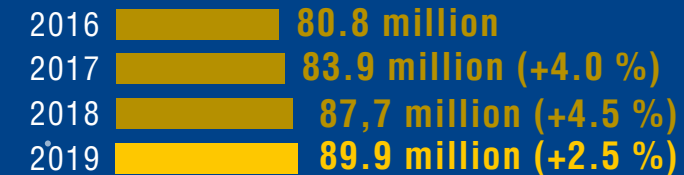
All OVERNIGHT STAYS in Germany

At 495.6 million (2018: 477.6 million), the total number of overnight stays in Germany was up 18 million (plus 3.7 per cent) on the previous year. The number of overnight stays by German visitors rose by 16.8 million to a current 405.7 million, while overnight stays by foreign visitors were 2.2 million (plus 2.5 per cent) higher than in 2018 at 87.7 million.

Overnight stays of German visitors



Overnight stays by foreign visitors



30.340
Companies

963.690
Rooms

1.778.452
Beds

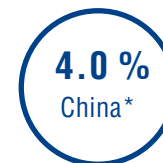
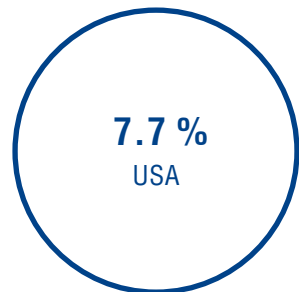
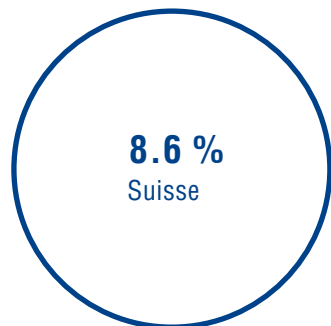
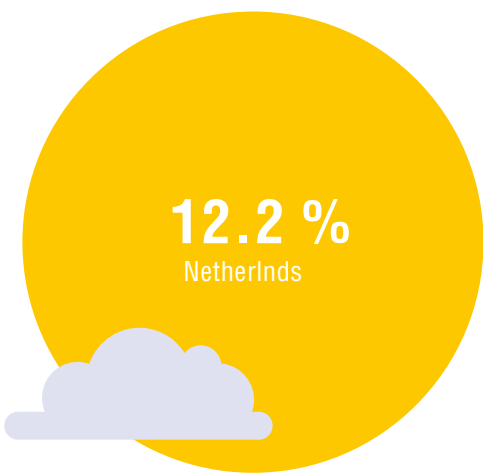
95€
Ø Room rate

71.5%
Ø Room occupancy

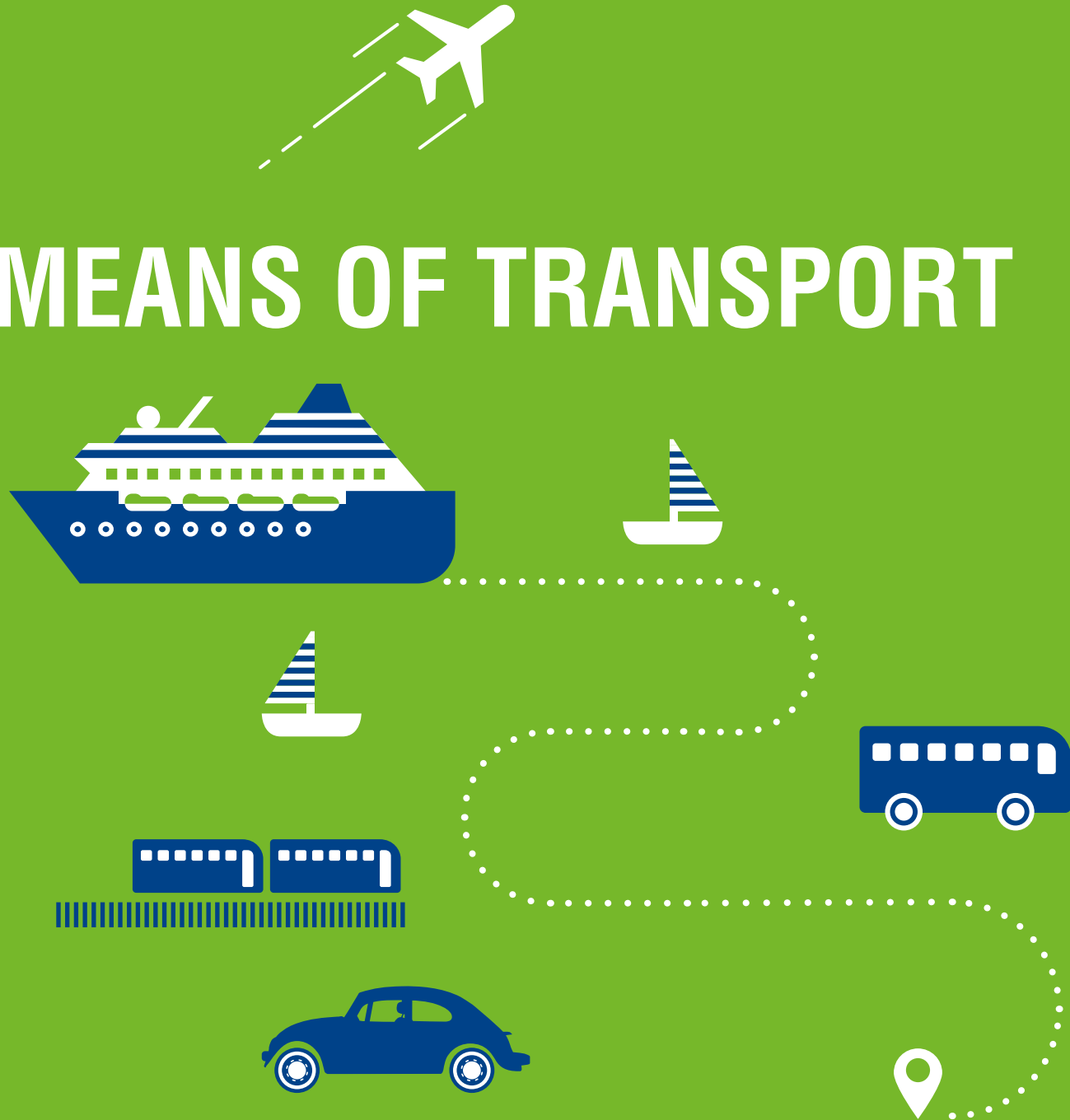
Sources: Statistisches Bundesamt, Hotelverband Deutschland (IHA)

The most important SOURCE MARKETS FOR TRIPS to Germany

Share of all overnight stays from abroad

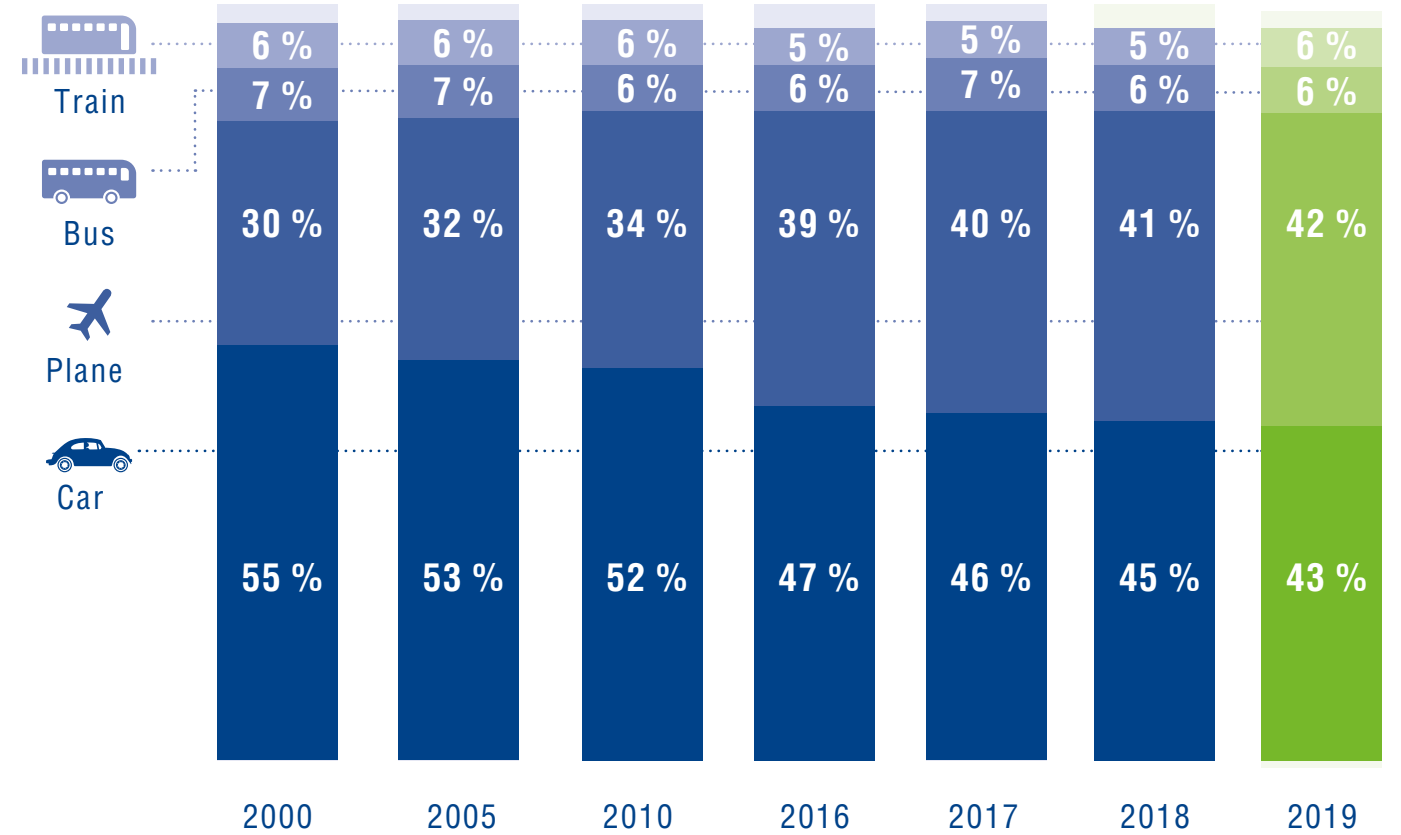


MEANS OF TRANSPORT



The most popular MEANS OF TRANSPORT for holiday trips

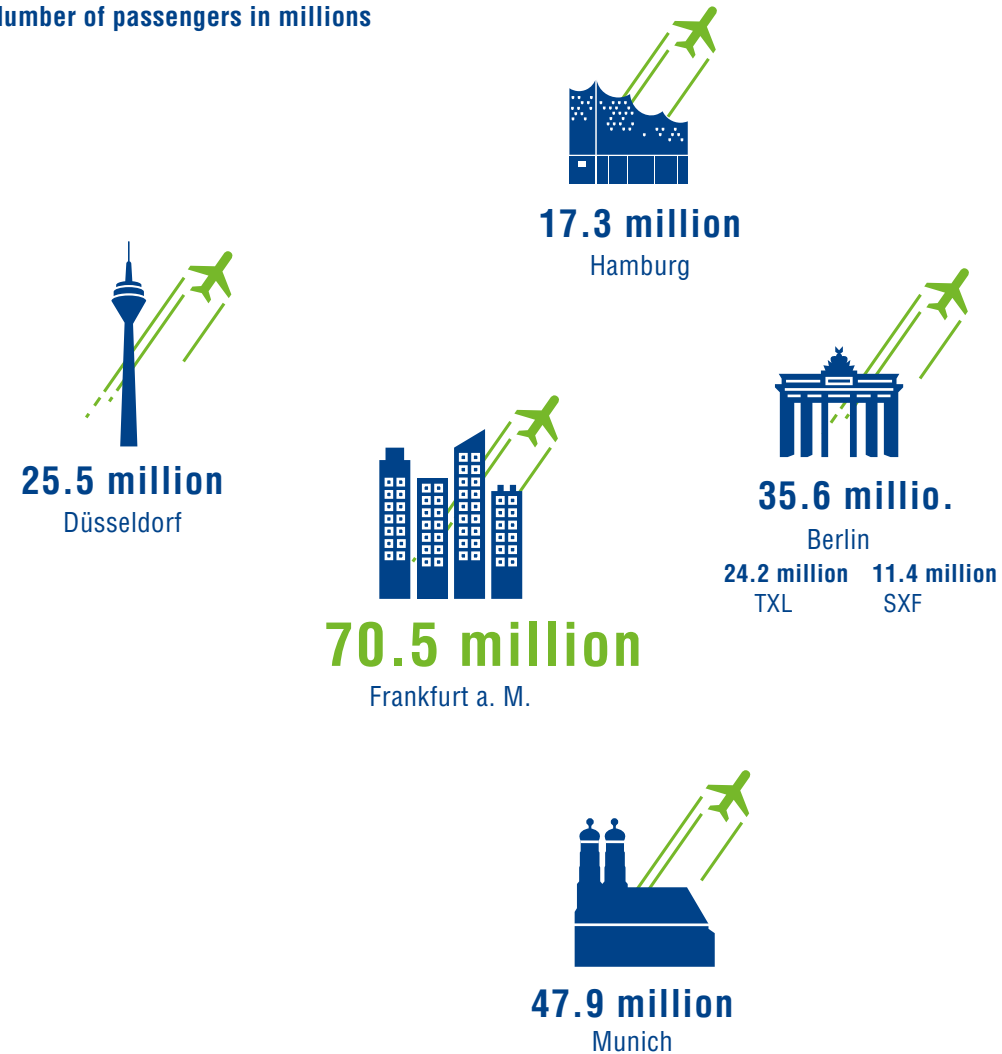
German holiday trips of 5 days or more, percentage share



Difference to 100 percent: other means of transport such as ship
Source: Reiseanalyse 2020

The 5 biggest AIRPORTS in Germany

Number of passengers in millions



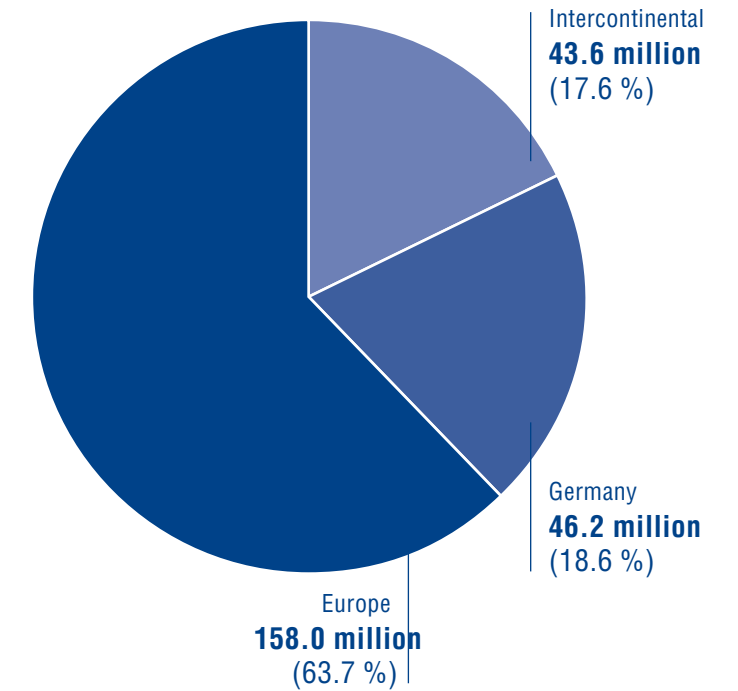
The PASSENGER VOLUME in aviation

In 2019 a total of 248.1 (2018: 244.3) million passengers took off or landed at German airports.

This is 3.8 million passengers more than in 2018 and represents an increase of 1.5 percent.

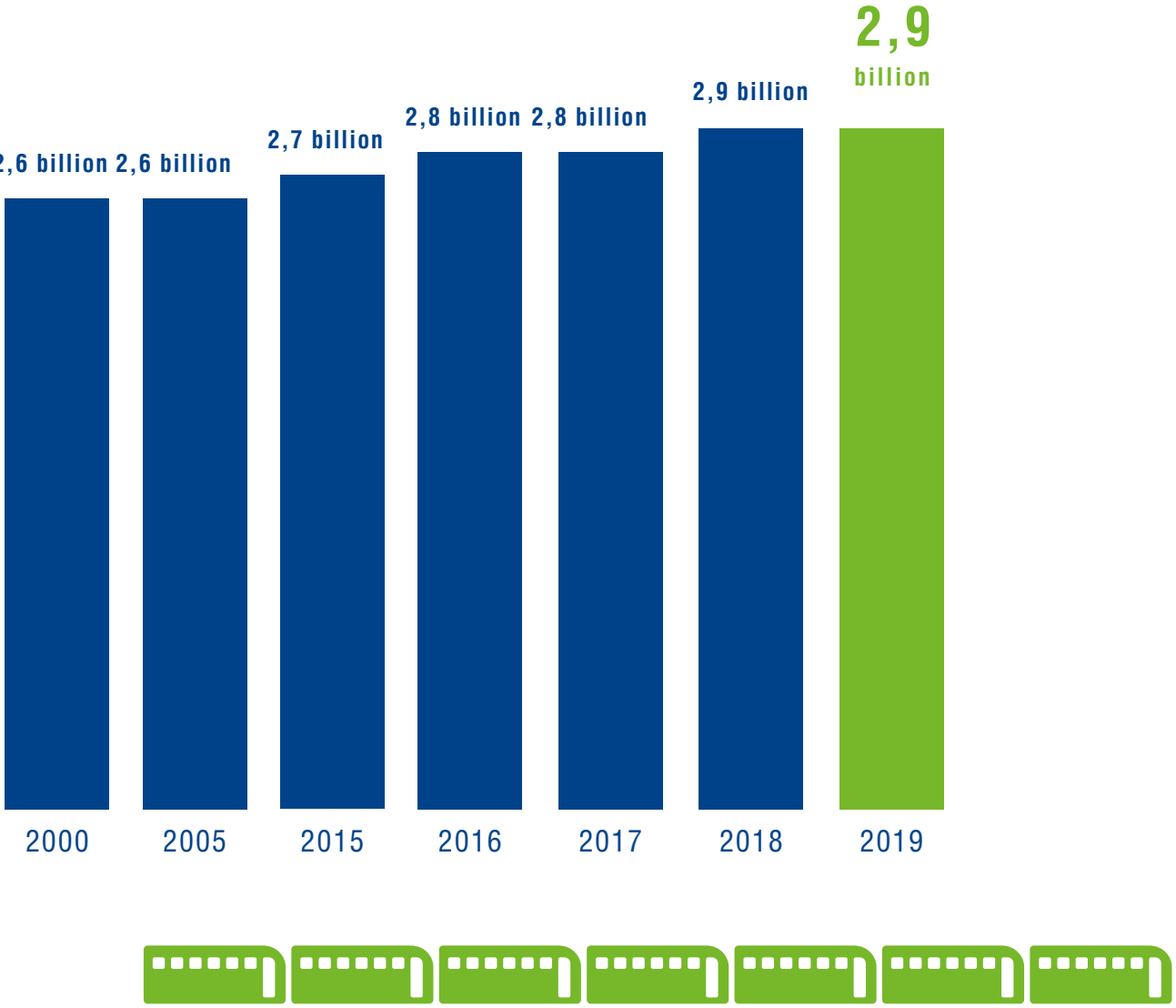
Growth in intra European air traffic amounted to 2.3 percent.

Intercontinental traffic grew by 2.7 percent. There was a decline of 1.9 percent in domestic German air traffic.



Transport performance of the railways in Germany

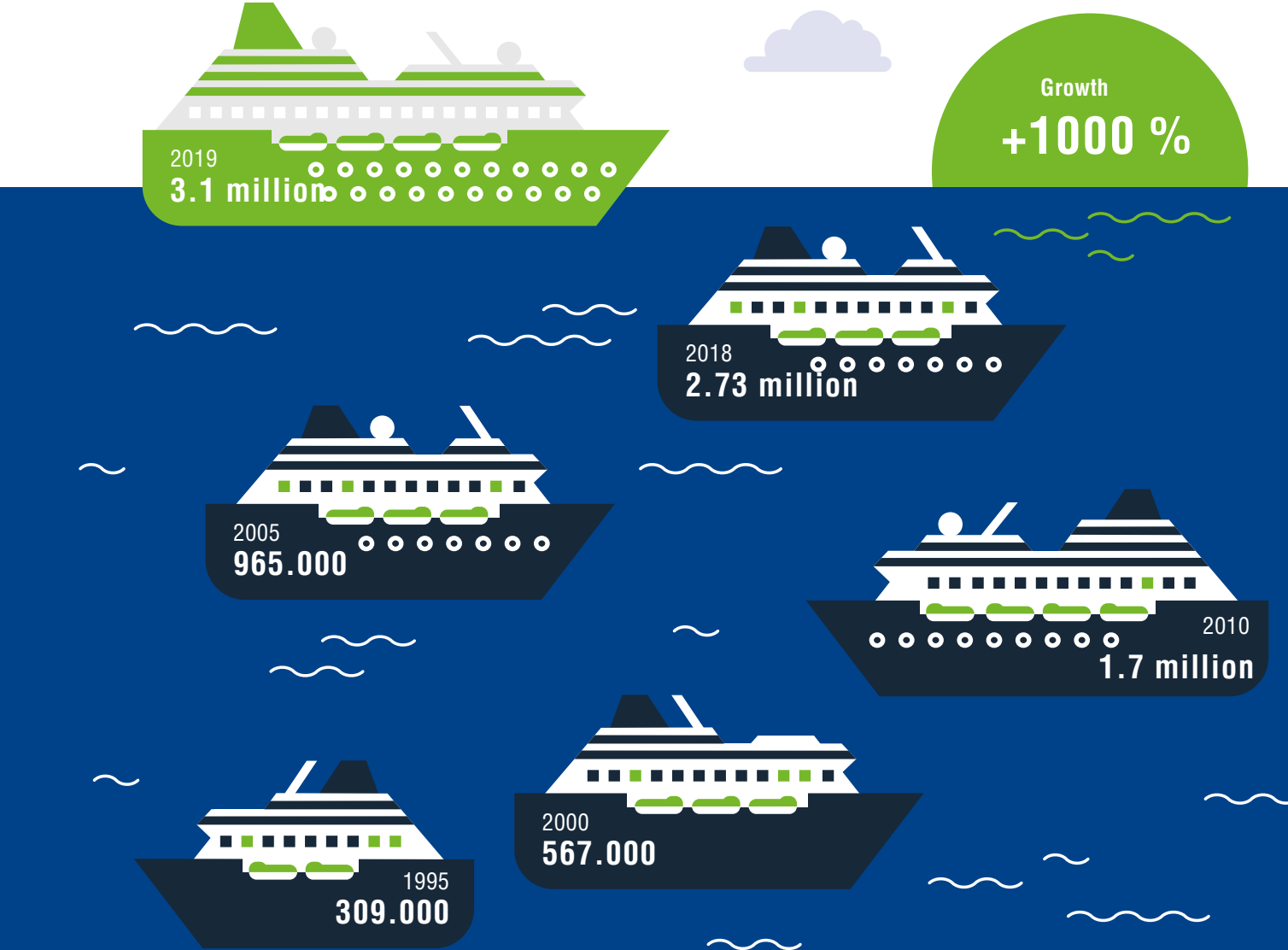
Number of passengers carried



Source: Statistisches Bundesamt

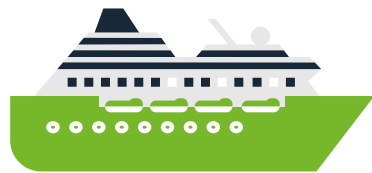
CRUISES

More and more passengers on rivers and seas

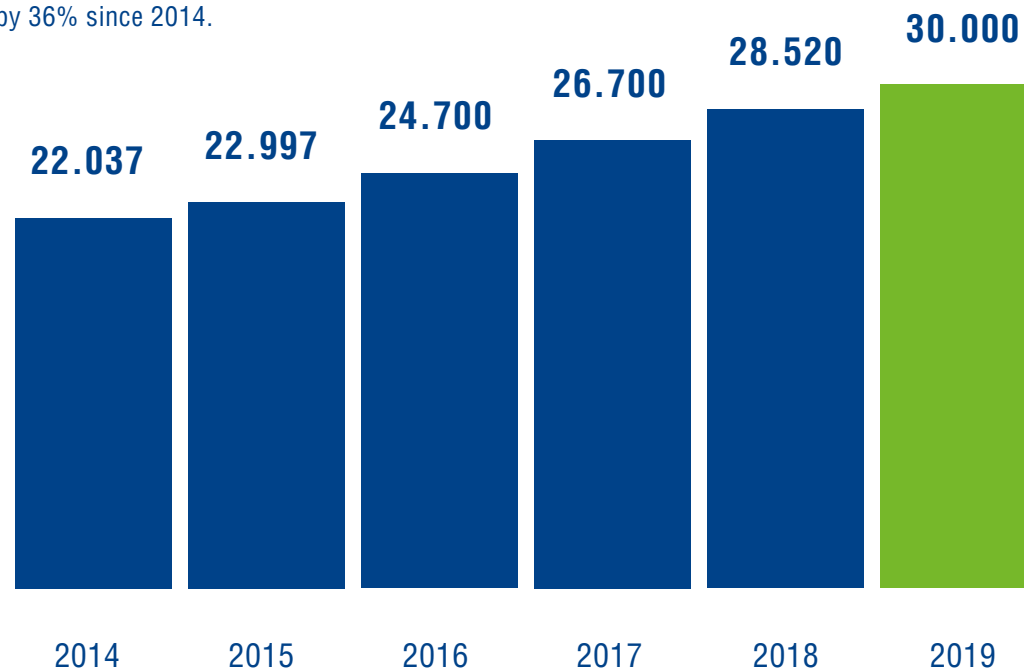


Sea Cruises: PASSENGER DEVELOPMENT

Worldwide passenger numbers in million



Number of passengers worldwide have risen by 36% since 2014.



Source: CLIA Europe Statistics

The CRUISE MARKET

Germany

Sea Cruises

	2016	2017	2018	2019
Number of passengers	2.018.142	2.188.473	2.230.000	2.580.000
Ø Travel time	8.9 nights	8.9 nights	9.1 nights	9.1 nights

River cruises

	2016	2017	2018	2019
Rhine, Danube				
Turnover	449 million €* [*]	501 million €* [*]	591 million €* [*]	653 million €* [*]
Number of passengers	435.586	470.398	496.270	541.133
Ø Travel price	1.030 €* [*]	1.065 €* [*]	1.191 €* [*]	1.207 €* [*]
Ø Travel time	6.9 nights	6.8 nights	7.1 nights	7.0 nights

Sources: CLIA Deutschland (estimates), River numbers – IG RiverCruise * Turnover without travel: Ticket revenue from/to port

BUSINESS TRAVEL MARKET



Developments in the German BUSINESS TRAVEL MARKET 2018

	2016	2017	2018
Number	183.4 million	187.5 million	189.6 million
Average costs	310 €	307 €	310 €
Costs per person / day	155 €	157 €	162 €
Total overnight stays Business Travel	74.3 million	72.5 million	72.5 million
thereof companies with 10-500 employees	39.7 billion €	40.6 billion €	41.3 billion €
thereof companies with >500 employees	11.9 billion €	11.9 billion €	12.2 billion €
Total costs	51.6 billion €	52.5 billion €	53.5 billion. €

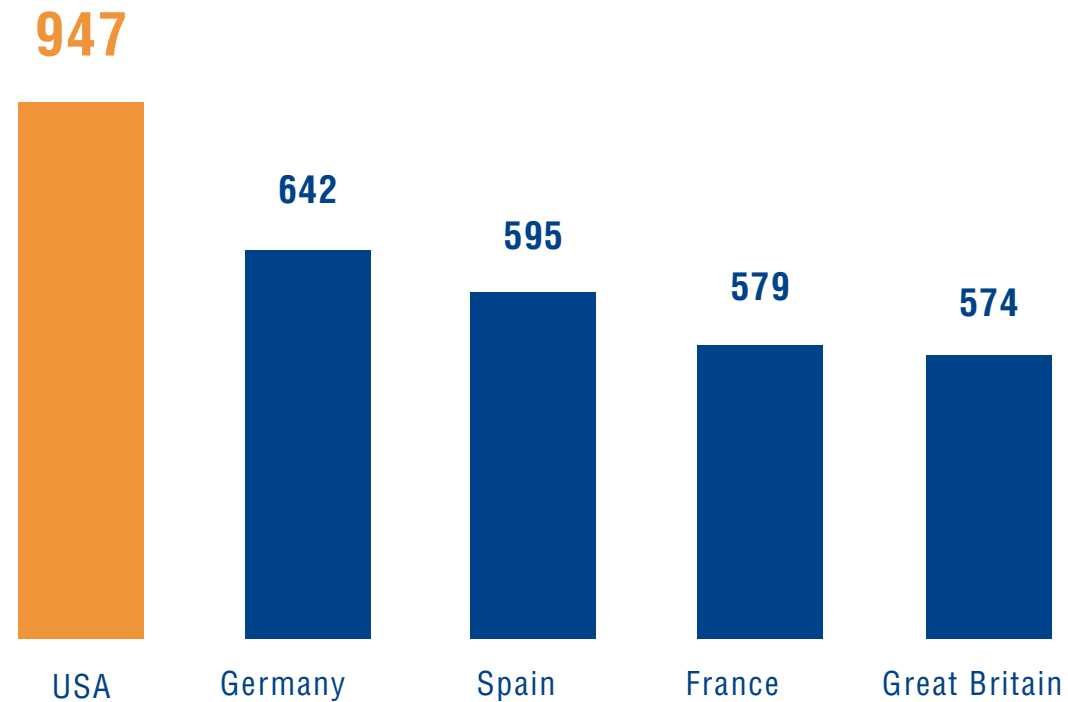


In 2018 there were a total of 189.6 million business trips from Germany.

TOP 5 CONGRESS COUNTRIES

worldwide 2018

Number of congresses in the five main congress countries



Ranking CONGRESS CITIES

worldwide 2018

Number of congresses in the 5 most important congress cities



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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."



Norbert Fiebig
President
fiebig@drv.de



Dirk Inger
Managing Director
inger@drv.de



Olaf Collet
Head of statistics
collet@drv.de



Torsten Schäfer
Head of communications
schaef@drv.de



Dr. Ellen Madeker
Head of strategy
maded@drv.de



Kerstin Heinen
Head of tourist communications
heinen@drv.de

Deutscher Reiseverband

Lietzenburger Straße 99
10707 Berlin

T +49 30 28406-0
info@drv.de
drv.de

