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## 2019

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- Passenger volume in aviation
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- Development in the German business travel market 2018
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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.

1.71 billion
1.70 billion
0.5%

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

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.
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Travel Expenditure (billion €)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>65</td>
</tr>
<tr>
<td>2018</td>
<td>67</td>
</tr>
<tr>
<td>2019</td>
<td>69.5</td>
</tr>
</tbody>
</table>

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.

5.5 percent increase: German travel expenditure rises significantly

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<td>2018</td>
<td>67</td>
</tr>
<tr>
<td>2019</td>
<td>69.5</td>
</tr>
</tbody>
</table>

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

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

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 packages and linked travel arrangements organised with the help of tour operators/travel agencies)
- 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)
- 2.300 tour operators in Germany
- 495.6 million overnight stays by residents and non-residents in Germany in 2019
- 2.9 million employees in the tourism industry in Germany (+ 7% of all jobs)
- 2,300 tour operators in Germany
- More than 50% of the tour operator trips the Germans book via travel agencies
- 78.2% travel intensity (percentage of population travelling)
- 495.6 million overnight stays by residents and non-residents in Germany in 2019
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- 2.300 tour operators in Germany
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* The remainder is divided 2/3 between Mediterranean destinations and 1/3 between travelling by car to neighbouring countries.

D
Market structure in the GERMAN TOURISM MARKET 2019

12 % 
Product portals and others
8.3 billion €
Websites on which only one product type is offered (e.g. hotel, flight, car rental portals)

51 % 
Tour operators / travel agencies
35.4 billion €
Bookings of tour operator trips

37 % 
Service providers
Online + Offline
25.7 billion €
Airlines, train and car rental companies, hotels, long-distance bus companies, event organisers etc.

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

<table>
<thead>
<tr>
<th>Category</th>
<th>2015</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel services booked before departure</td>
<td>84.1 billion €</td>
<td>98.1 billion €</td>
</tr>
<tr>
<td>Travel services booked in the destination</td>
<td>8.4 %</td>
<td>7.7 %</td>
</tr>
<tr>
<td>Auxiliary expenditure in the destination</td>
<td>21.9 %</td>
<td>21.5 %</td>
</tr>
<tr>
<td>Auxiliary expenditure in the destination</td>
<td>69.8 %</td>
<td>70.8 %</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Total turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>21.6 billion €</td>
</tr>
<tr>
<td>2011</td>
<td>22.0 billion €</td>
</tr>
<tr>
<td>2012</td>
<td>21.8 billion €</td>
</tr>
<tr>
<td>2013</td>
<td>21.8 billion €</td>
</tr>
<tr>
<td>2014</td>
<td>24.1 billion €</td>
</tr>
<tr>
<td>2015</td>
<td>25.8 billion €</td>
</tr>
<tr>
<td>2016</td>
<td>25.2 billion €</td>
</tr>
<tr>
<td>2017</td>
<td>33.7 billion €</td>
</tr>
<tr>
<td>2018</td>
<td>35.2 billion €</td>
</tr>
<tr>
<td>2019</td>
<td>35.4 billion €</td>
</tr>
</tbody>
</table>

Source: GfK Mobilitätsmonitor (Services booked before departure for holiday and private trips with at least one overnight stay)
Cared for:
TOUR OPERATORS MARKET
at a glance

The largest tour operators in
German-speaking countries

<table>
<thead>
<tr>
<th>Tour operators</th>
<th>Sales in million euros in 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>TUI*</td>
<td>7,253</td>
</tr>
<tr>
<td>DER Touristik</td>
<td>3,440</td>
</tr>
<tr>
<td>Thomas Cook**</td>
<td>3,360</td>
</tr>
<tr>
<td>FTI</td>
<td>3,200</td>
</tr>
<tr>
<td>Aida Cruises</td>
<td>2,110</td>
</tr>
<tr>
<td>Alltours</td>
<td>1,450</td>
</tr>
<tr>
<td>Schauinsland Reisen</td>
<td>1,370</td>
</tr>
<tr>
<td>Other</td>
<td>17,9</td>
</tr>
</tbody>
</table>

* Including TUI Cruises + HLKF; ** Including Condor Flight only

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

<table>
<thead>
<tr>
<th>Waterloo Dannon</th>
<th>17.9 %</th>
</tr>
</thead>
<tbody>
<tr>
<td>DER Touristik</td>
<td>8.5 %</td>
</tr>
<tr>
<td>Thomas Cook**</td>
<td>8.3 %</td>
</tr>
<tr>
<td>FTI</td>
<td>7.9 %</td>
</tr>
<tr>
<td>Aida Cruises</td>
<td>5.2 %</td>
</tr>
<tr>
<td>Alltours</td>
<td>3.6 %</td>
</tr>
<tr>
<td>Schauinsland Reisen</td>
<td>3.3 %</td>
</tr>
<tr>
<td>Other</td>
<td>45.2 %</td>
</tr>
</tbody>
</table>

Sources including Graphic page 13: own calculations, FVW Dossier „Deutsche Veranstalter 2019“

In 2019, travel agencies and tour operators employed 71,368 persons (previous year: 70,897).

Source: Bundesagentur für Arbeit
Sales development in billion Euros (holidays and business travel)

TRACEL AGENCIES
make a difference

<table>
<thead>
<tr>
<th>Year</th>
<th>Sales (billion Euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>22.0</td>
</tr>
<tr>
<td>2010</td>
<td>21.8</td>
</tr>
<tr>
<td>2014</td>
<td>25.8</td>
</tr>
<tr>
<td>2016</td>
<td>25.2</td>
</tr>
<tr>
<td>2017</td>
<td>26.4</td>
</tr>
<tr>
<td>2018</td>
<td>26.9</td>
</tr>
</tbody>
</table>

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 %
The 5 largest travel agency organisations 2018

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Turnover in billion Euros (sales outlets)</th>
</tr>
</thead>
<tbody>
<tr>
<td>DER Touristik</td>
<td>4.95 (2.442)</td>
</tr>
<tr>
<td>RTK-Group</td>
<td>4.12 (2.171)</td>
</tr>
<tr>
<td>TUI Germany</td>
<td>3.93 (1.593)</td>
</tr>
<tr>
<td>BCD Travel</td>
<td>1.89 (46)</td>
</tr>
<tr>
<td>LH City Center</td>
<td>1.57 (302)</td>
</tr>
</tbody>
</table>

Travel agency density by federal states 2018

Number of travel agencies per 100,000 inhabitants

<table>
<thead>
<tr>
<th>Federal State</th>
<th>Number of Travel Agencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Saxony</td>
<td>18.4</td>
</tr>
<tr>
<td>Bavaria</td>
<td>12.4</td>
</tr>
<tr>
<td>Mecklenburg-Western Pomerania</td>
<td>12.1</td>
</tr>
<tr>
<td>Saxony-Anhalt</td>
<td>12.5</td>
</tr>
<tr>
<td>Lower Saxony</td>
<td>11.9</td>
</tr>
<tr>
<td>Rhineland-Palatinate</td>
<td>11.6</td>
</tr>
<tr>
<td>Lower Saxony</td>
<td>11.3</td>
</tr>
<tr>
<td>Mecklenburg-Holstein</td>
<td>9.5</td>
</tr>
<tr>
<td>Schleswig-Holstein</td>
<td>12.1</td>
</tr>
<tr>
<td>Saxony</td>
<td>12.0</td>
</tr>
<tr>
<td>Saxony-Anhalt</td>
<td>12.5</td>
</tr>
<tr>
<td>Rhineland-Palatinate</td>
<td>12.9</td>
</tr>
<tr>
<td>Hamburg</td>
<td>11.5</td>
</tr>
<tr>
<td>Berlin</td>
<td>13.0</td>
</tr>
<tr>
<td>Bremen</td>
<td>14.2</td>
</tr>
<tr>
<td>Saxony</td>
<td>17.7</td>
</tr>
<tr>
<td>Brandenburg</td>
<td>14.0</td>
</tr>
<tr>
<td>Baden-Wuerttemberg</td>
<td>13.2</td>
</tr>
<tr>
<td>Saarland</td>
<td>11.2</td>
</tr>
<tr>
<td>Bavaria</td>
<td>11.6</td>
</tr>
<tr>
<td>Hesse</td>
<td>12.1</td>
</tr>
<tr>
<td>Rhineland-Palatinate</td>
<td>11.6</td>
</tr>
<tr>
<td>North Rhine-Westphalia</td>
<td>12.9</td>
</tr>
</tbody>
</table>

Share of early and late bookers 2018

<table>
<thead>
<tr>
<th>Time Frame</th>
<th>Share of Bookings</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 1 month</td>
<td>12.1%</td>
</tr>
<tr>
<td>≤ 2 months</td>
<td>13.7%</td>
</tr>
<tr>
<td>≤ 3 months</td>
<td>11.6%</td>
</tr>
<tr>
<td>≤ 5 months</td>
<td>20.7%</td>
</tr>
<tr>
<td>≥ 6 months</td>
<td>16.2%</td>
</tr>
</tbody>
</table>

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

Sources: FVW-Dossier „Deutscher Reisevertrieb 2018“, Publication date June 2019, GfK Travel Insights
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>11.3</td>
</tr>
<tr>
<td>2015</td>
<td>11.3</td>
</tr>
<tr>
<td>2016</td>
<td>10.9</td>
</tr>
<tr>
<td>2017</td>
<td>11.4</td>
</tr>
<tr>
<td>2018</td>
<td>11.0</td>
</tr>
<tr>
<td>2019</td>
<td>10.9</td>
</tr>
</tbody>
</table>

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

- BCD Travel: 1.89
- DER / Derpart: 1.24
- Lufthansa City Center (LCC): 0.90
- TUI*: 0.68

* 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)

- Antalya: 31.3%
- Palma de Mallorca: 19.0%
- Hurghada: 19.1%
- Fuerteventura: 5.5%
- Las Palmas: 5.0%
- Heraklion: 6.3%

How much do customers spend per online booking?

- Over 3,000 €: 10.3%
- 2,500–2,999 €: 7.8%
- 2,000–2,499 €: 12.9%
- 1,500–1,999 €: 20.1%
- 1,000–1,499 €: 27.2%
- 500–999 €: 18.8%
- 0–499 €: 3.1%

Sources: Amadeus Top 10 Analysis 2019
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 the years before, France counted the most visitors worldwide in 2019.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Arrivals in 2019 (in million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>90.2*</td>
</tr>
<tr>
<td>Spain</td>
<td>83.7*</td>
</tr>
<tr>
<td>USA</td>
<td>78.7*</td>
</tr>
<tr>
<td>China</td>
<td>67.6*</td>
</tr>
<tr>
<td>Italy</td>
<td>64.7*</td>
</tr>
<tr>
<td>Turkey</td>
<td>52.2*</td>
</tr>
<tr>
<td>Mexico</td>
<td>44.9*</td>
</tr>
<tr>
<td>Thailand</td>
<td>39.7*</td>
</tr>
<tr>
<td>Germany</td>
<td>39.4*</td>
</tr>
<tr>
<td>Great Britain</td>
<td>36.9*</td>
</tr>
</tbody>
</table>

Visitors in 2019 in million

Source: UNWTO, * own projections

742 million (50.8 %) Europe
364 million (24.9 %) Asia/Pacific
220 million (15.1 %) North and South America
71 million (4.9 %) Africa
64 million (4.4 %) Middle East
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 hot spots.

By guest arrivals, in million visitors

The 5 most popular CITY TRIPS in Germany 2019

Source: Statistische Landesämter

*own projection

Berlin*

13.5 2018
13.9 2019

Munich*

8.3 2018
8.7 2019

Hamburg*

7.2 2018
7.6 2019

Frankfurt a.M.*

5.9 2018
6.3 2019

Cologne*

3.7 2018
3.8 2019

The GERMAN HOLIDAY DESTINATIONS 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

Mediterranean (regions directly bordering the Mediterranean) 37.9 %

Germany 26 %

Long distance travel 8.4 %

Scandinavia (DK, N, S, FIN) 3.2 %

Eastern Europe (H, CZ, PL, RUS etc.) 7.2 %

Western Europe (GB, IRL, F, NL, CH, A) 13.3 %

other countries 3.3 %

70.8 million

26.4 %

thereof Germany

26 %

thereof abroad

8.4 %

Long distance travel

3.2 %

Scandinavia (DK, N, S, FIN)

7.2 %

Eastern Europe (H, CZ, PL, RUS etc.)

37.9 %

Mediterranean (regions directly bordering the Mediterranean)

3.3 %

other countries

Source: Reiseanalyse 2020
The 10 most popular
DOMESTIC DESTINATIONS
within Germany

Share of all holiday trips of five days or more 2019

Source: Reiseanalyse 2020. Note: Selection of destinations, do not add up to 100

The 10 most popular
FOREIGN DESTINATIONS
for Germans

Share of all holiday trips of five days or more 2019

Source: Reiseanalyse 2020. Note: Selection of destinations, do not add up to 100

Spain 12.7%
Italy 8.7%
Turkey 6.3%
Austria 4.7%
Greece 4.1%
France 3.6%
Croatia 2.7%
Poland 2.7%
Netherlands 2.4%
Egypt 2.0%
TRAVEL INCOME AND TRAVEL EXPENSES
of Germans

Income
36.5 billion €
The world loves
Germany

Expenses
82.7 billion €
Germans love
the world

Germany's income from international travel
Income in billion euros

Source: own projections based on Deutsche Bundesbank

Expenditure by Germans on their trips abroad*
Expenditure in billion euros

Source: own projections based on Deutsche Bundesbank, * including all expenses abroad
The average duration of main holiday trips

13 days was the average duration of travel in 2019.

Source: Reiseanalyse 2020

The 10 most popular short trip destinations of Germans in Germany

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

Source: Reiseanalyse 2020. Note: Selection of destinations, do not add up to 100

- Hamburg 6.3%
- Schleswig-Holstein 3.4%
- Mecklenburg-Western Pomerania 5.1%
- Saxony 7.8%
- Lower Saxony 6.0%
- North Rhine-Westphalia 5.9%
- Hesse 4.1%
- Berlin 7.5%
- Baden-Wuerttemberg 5.5%
- Bavaria 12.0%
The 10 most popular
SHORT TRIP DESTINATIONS
of Germans abroad

<table>
<thead>
<tr>
<th>Country</th>
<th>Share of all short breaks, travel duration two to four days 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>4.2 %</td>
</tr>
<tr>
<td>Netherlands</td>
<td>3.4 %</td>
</tr>
<tr>
<td>France</td>
<td>3.1 %</td>
</tr>
<tr>
<td>Spain</td>
<td>1.9 %</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>1.9 %</td>
</tr>
<tr>
<td>Italy</td>
<td>1.8 %</td>
</tr>
<tr>
<td>Great Britain</td>
<td>1.7 %</td>
</tr>
<tr>
<td>Poland</td>
<td>1.2 %</td>
</tr>
<tr>
<td>Belgium</td>
<td>1.0 %</td>
</tr>
<tr>
<td>Denmark</td>
<td>0.9 %</td>
</tr>
</tbody>
</table>

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

Sources: Reiseanalyse 2020, GfK Mobilitätsmonitor

SHORT BREAKS IN GERMANY AND ABROAD by Germans

Travel duration two to four days in 2019

<table>
<thead>
<tr>
<th>Country</th>
<th>Share of all short breaks, travel duration two to four days 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abroad</td>
<td>21.3 million (25 %)</td>
</tr>
<tr>
<td>Domestic</td>
<td>62.5 million (75 %)</td>
</tr>
</tbody>
</table>

Day trips made by Germans 2019

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

<table>
<thead>
<tr>
<th>Country</th>
<th>Number of Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>415,025</td>
</tr>
<tr>
<td>Abroad</td>
<td>26,895</td>
</tr>
<tr>
<td>Total</td>
<td>441,920</td>
</tr>
</tbody>
</table>

Sources: Reiseanalyse 2020, GfK Mobilitätsmonitor
The most popular
CITY DESTINATIONS
for Germans

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

- Berlin: 7.5%
- Hamburg: 6.3%
- Munich: 3.4%
- Dresden: 2.2%
- Cologne: 2.0%
- Bremen: 1.5%

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

- Paris: 1.4%
- London: 1.2%
- Vienna: 1.1%
- Prague: 1.0%
- Amsterdam: 0.8%
- Barcelona: 0.6%

Sources: Reiseanalyse 2020

At 495.6 million (2018: 477.6 million), the total number of overnight stays within 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.

Sources: Statistisches Bundesamt, Hotelverband Deutschland (IHA)

Overnight stays of German visitors

<table>
<thead>
<tr>
<th>Year</th>
<th>Overnight stays</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>366.5 million</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>375.7 million</td>
<td>(+3.0%)</td>
</tr>
<tr>
<td>2018</td>
<td>389.9 million</td>
<td>(+3.8%)</td>
</tr>
<tr>
<td>2019</td>
<td>405.7 million</td>
<td>(+3.9%)</td>
</tr>
</tbody>
</table>

Overnight stays by foreign visitors

<table>
<thead>
<tr>
<th>Year</th>
<th>Overnight stays</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>88.8 million</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>89.9 million</td>
<td>(+4.0%)</td>
</tr>
<tr>
<td>2018</td>
<td>87.7 million</td>
<td>(+4.5%)</td>
</tr>
<tr>
<td>2019</td>
<td>89.9 million</td>
<td>(+2.5%)</td>
</tr>
</tbody>
</table>

30.340 Companies
963.690 Rooms
1.778.452 Beds
95€ Room rate
71.5% Room occupancy

Sources: Statistisches Bundesamt, Hotelverband Deutschland (IHA)
The most important SOURCE MARKETS for Germany

Share of all overnight stays from abroad

12.2% Netherlands
8.6% Switzerland
7.7% USA
6.4% Great Britain
5.3% Austria
4.8% France
4.7% Italy
4.2% Denmark
4.0% China* (incl. Hongkong)
3.7% Belgium

Source: Statistisches Bundesamt
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
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 transported

2,6 billion 2,7 billion 2,8 billion 2,9 billion

Source: Statistisches Bundesamt

CRUISES
More and more passengers on rivers and oceans

Growth +1000 %

2019 3.1 million
2018 2.73 million
2015 1.7 million
2000 309.000
1995 965.000
2005 567.000

2.9 billion

2,9 billion 2,8 billion 2,7 billion 2,6 billion

Ocean Cruises: PASSENGER DEVELOPMENT
Worldwide passenger numbers in millions

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Passengers (Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>22.04</td>
</tr>
<tr>
<td>2015</td>
<td>23.00</td>
</tr>
<tr>
<td>2016</td>
<td>24.70</td>
</tr>
<tr>
<td>2017</td>
<td>26.70</td>
</tr>
<tr>
<td>2018</td>
<td>28.52</td>
</tr>
<tr>
<td>2019</td>
<td>30.00</td>
</tr>
</tbody>
</table>

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

Cruise Market

Ocean Cruises:
- Number of passengers: 2,018,142
  - Ø Travel time: 8.9 nights
- Ø Travel price: 1,030 €*

River Cruises:
- Rhine, Danube:
  - Turnover: 449 million €*
  - Number of passengers: 435,586
  - Ø Travel time: 6.9 nights

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

### Development in the German Business Travel Market 2018

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

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

Source: Verband Deutsches Reisemanagement (VDR) – Geschäftsreiseanalyse 2019
TOP 5 MICE COUNTRIES worldwide 2018

Source: ICCA – International Congress and Convention Association 2018

USA  Germany  Spain  France  Great Britain

Number of trade fairs

947

642

595

579

574

Ranking MICE CITIES worldwide 2018

Number of congresses in the 5 most important congress cities

Paris  Vienna  Madrid  Barcelona  Berlin

212

172

165

163

162

Source: ICCA – International Congress and Convention Association 2018
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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