

THE GERMAN TRAVEL ASSOCIATION

THE GERMAN TRAVEL MARKET

FIGURES AND FACTS

2016



with the collaboration of



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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 97 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 214.1 billion. This corresponds to 9.7% of the entire gross value added of the German national economy. Consequently, tourism contributes more to the national output in Germany than, for instance, the automotive industry.

The total consumption expenditure of tourists in Germany amounted to EUR 278.3 billion in 2010, including EUR 241.7 billion which were spent by German tourists alone.*

The Germans ranked in 2016 again amongst the largest net foreign exchange earners in the international travel industry. The travel expenditure outside Germany corresponds to 4.3% of the total private consumption of federal citizens (2015: 4.4%).

Definition of gross value added

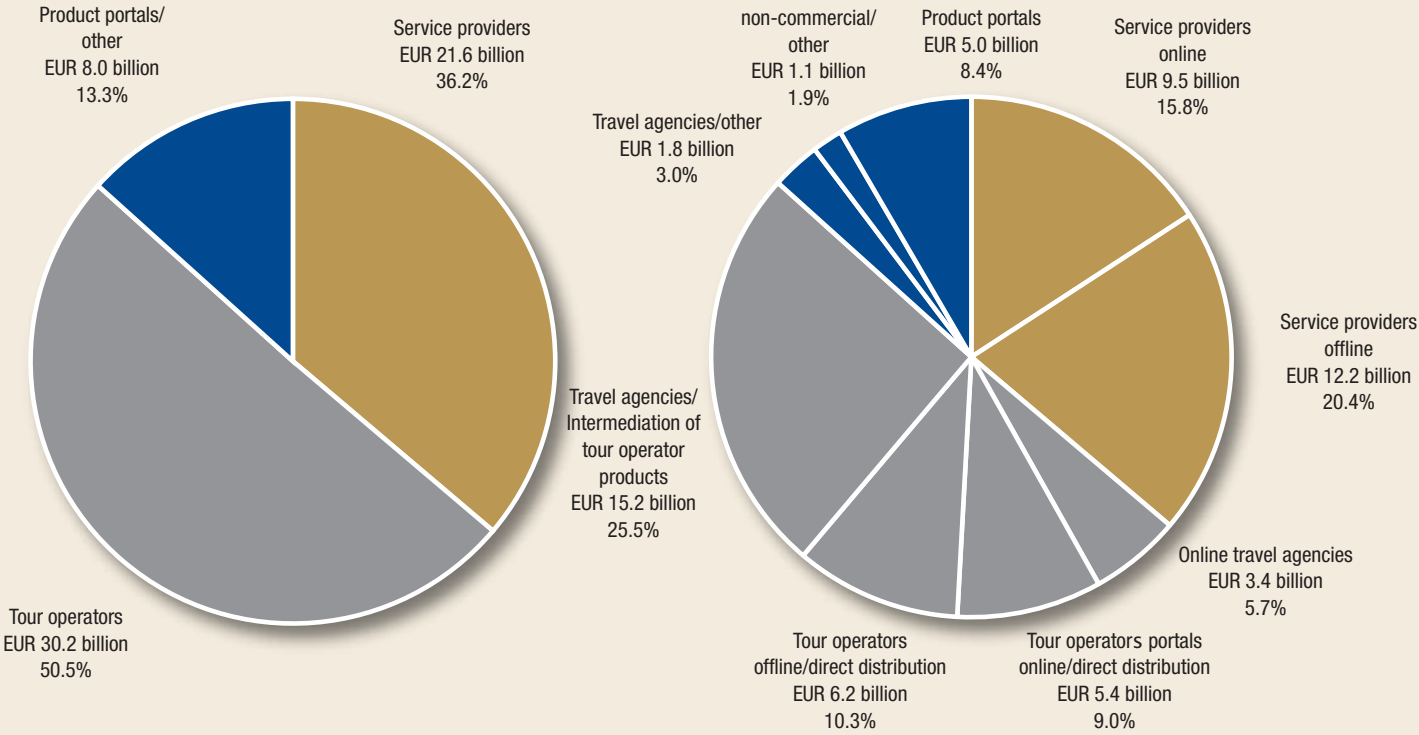
Gross value added specifies the total value of all goods and services produced, minus so-called advance contributions. This includes all goods and services which are processed or consumed during production.

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.

Tourism industry – more employees than in the automotive industry



Structure of the German tourism market

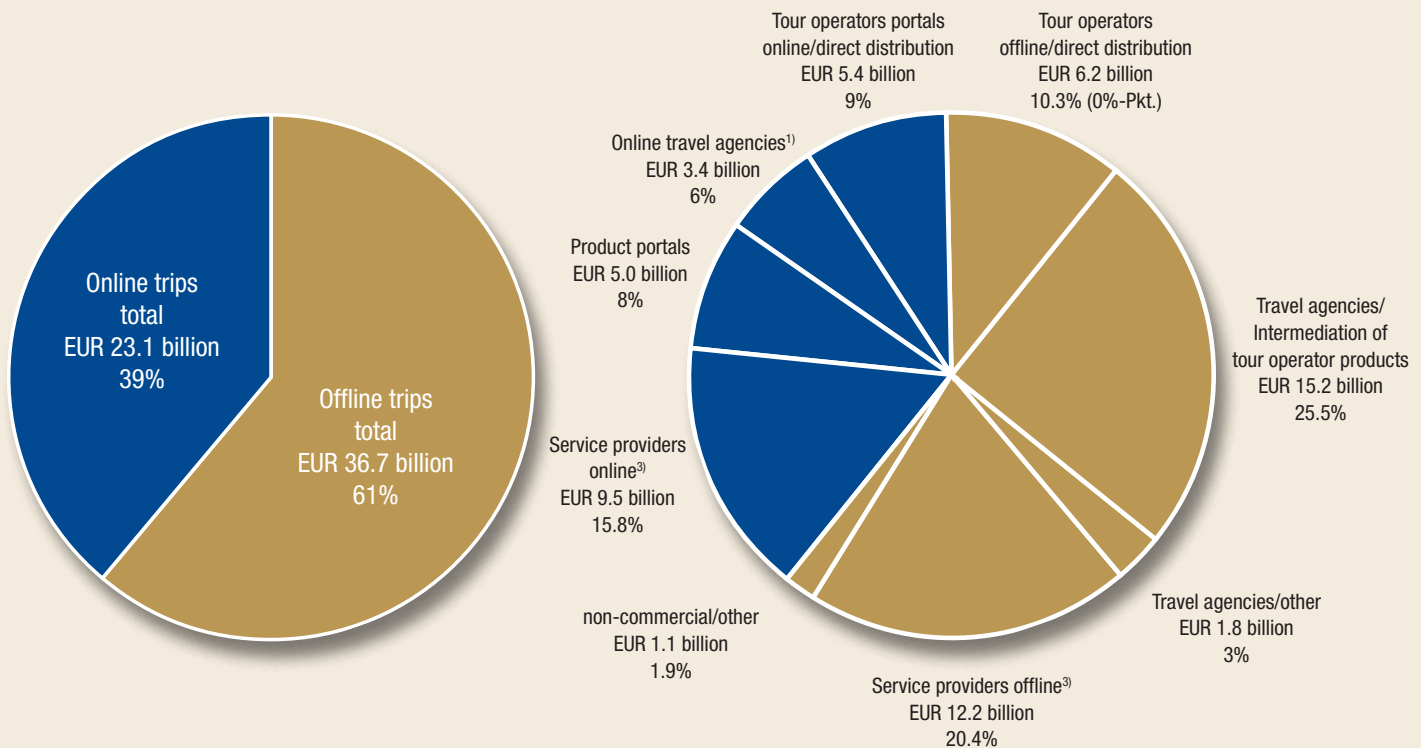


Source: GfK Mobility

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

pre-booked trips 2016

EUR 59.8 billion (2015: EUR 58.7 billion)



How many people work in travel agencies and with tour operators?

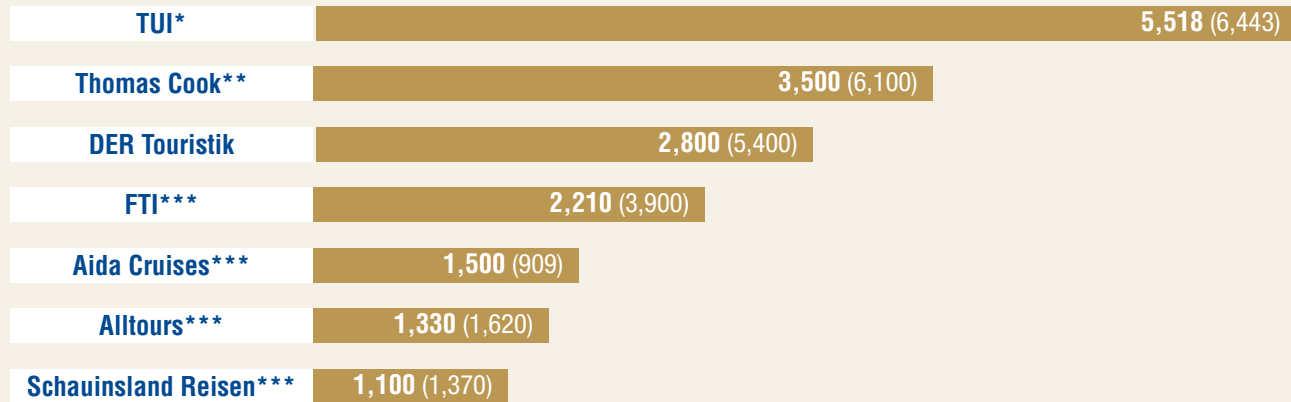
In 2016, 68,846 (2015: 68,904) persons were employed with social security affiliation by the German travel agencies and tour operators. In 2016, 1,764 young people started an apprenticeship as tourism agent (2015: 1,906) and 377 (2015: 402) an apprenticeship as tourism and leisure agent.

Perfectly cared for – tour operator market grows

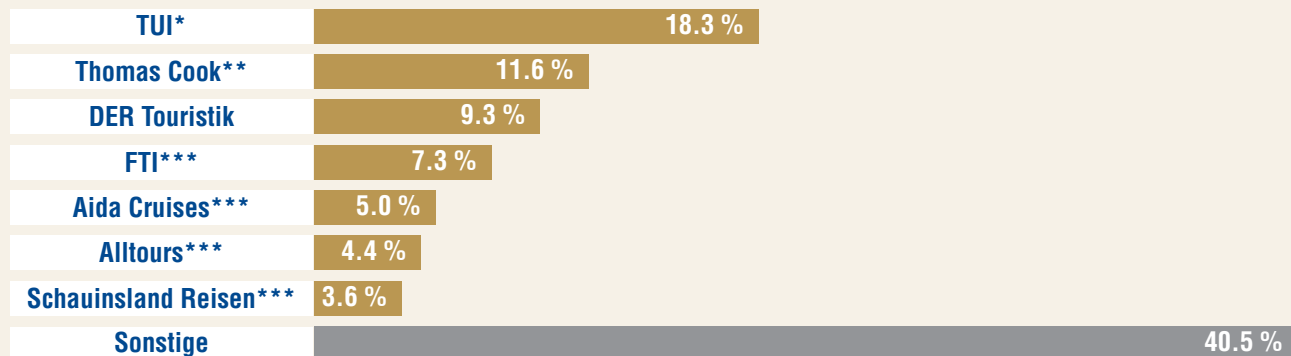


The largest tour operators in Germany

■ Sales revenues in EUR million (participants in thousands in 2016)



Market shares of tour operators



Referred to total sales revenues of EUR 30.2 billion of the German tour operators in 2016

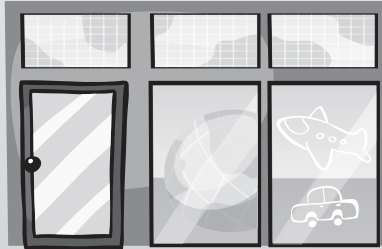
Sources including graphics page 8: own calculations, FVW analyst 2016

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

Travel agencies are indispensable – more sales revenues and more agencies



25.1 billion



2014

9,829 travel agencies



24.1 billion



2016

9,938 travel agencies

How many high-street travel agencies exist in Germany?

	2015	2016
Classical travel agencies	2,384	2,297
Business travel	790	757
Tourism travel agencies	6,706	6,884
Total travel agencies	9,880	9,938
Including IATA agencies	2,531	2,593
DB agencies	2,280	2,203

Definitions

Classical travel agency:	travel agency with at least one tour operator and at least one carrier licence (DB or IATA licence).
Business travel:	travel agency/service provider/corporate travel service department which deal primarily with business trip and business traveller customers
Tourism travel agency:	travel agency with at least two tour operator licences, without DB or IATA licence

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

Consolidated sales revenues of all travel distribution agencies in EUR billion	2016
Total sales revenues	24.5
Including Private customer business	17.1
Business travel	7.4

Travel world champion on the move

68.7 MILLION

**LONG HOLIDAY TRIPS
OF THE GERMANS**

70% of these outside Germany

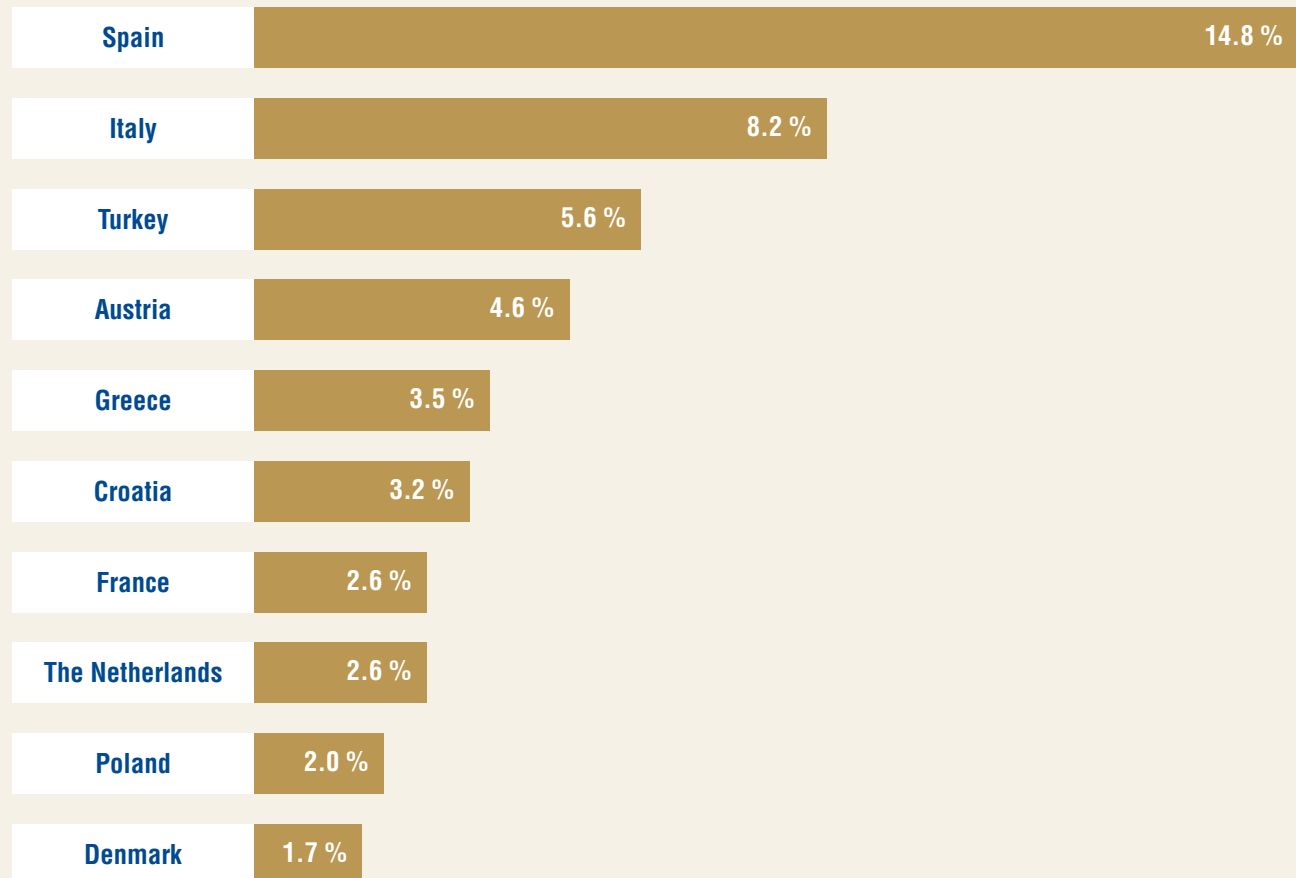
Where do the Germans spend their holiday?

Number of holiday trips from 5 days onwards in 2016

Total	68.7 million trips
Including Germany:	30.0 %
Abroad:	70.0 %
– Mediterranean (regions directly bordering on the Mediterranean)	36.5 %
– Western Europe (GB, IRL, F, NL, CH, A)	11.9 %
– Eastern Europe (H, CZ, PL, RUS etc.)	6.8 %
– Scandinavia (DK, N, S, FIN)	3.3 %
– Long-distance journeys	7.8 %

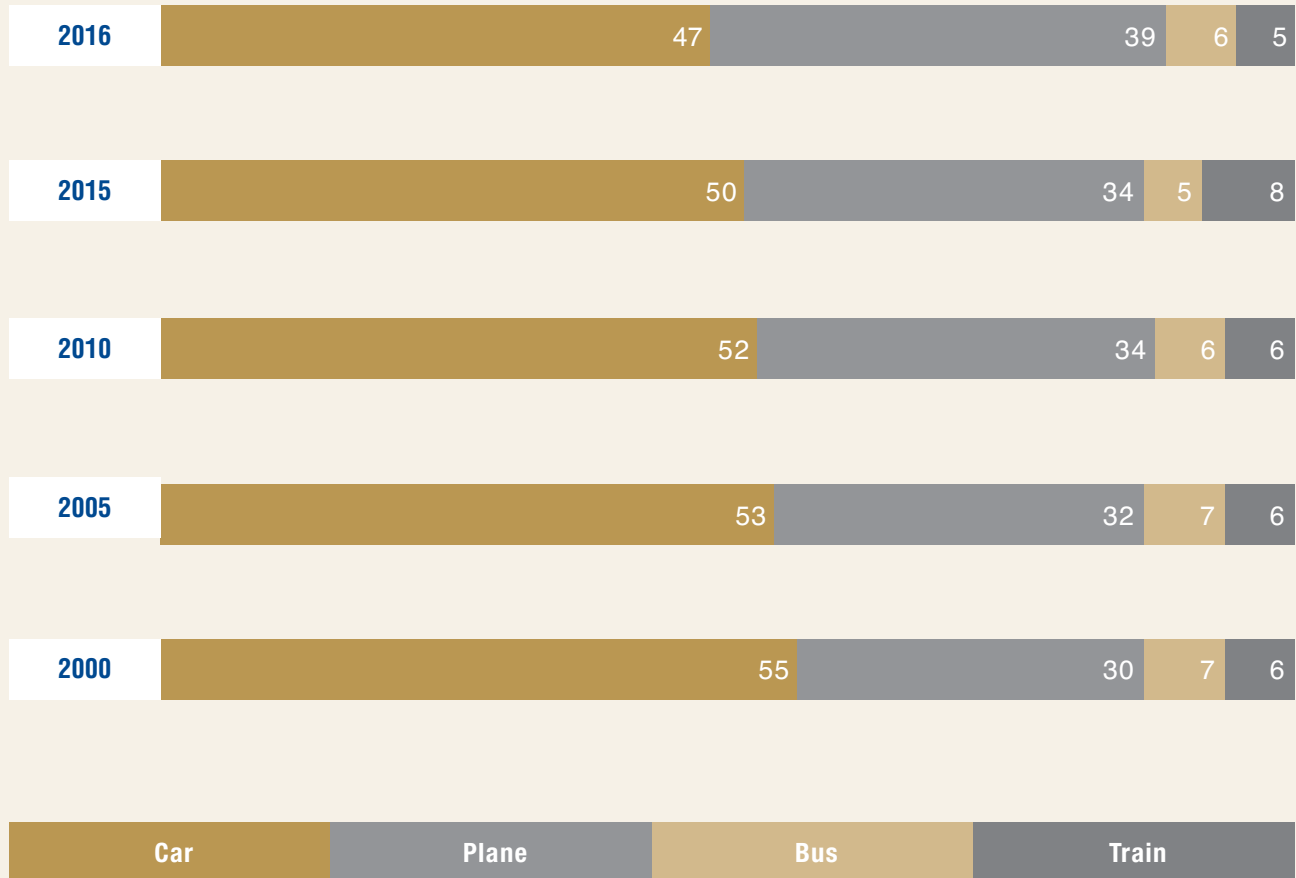
The 10 most popular foreign holiday destinations of the Germans

Shares in all holiday trips from 5 days onwards in 2016



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 2016

Travel income and travel expenditure

Income



EUR **33.3** billion
The world
loves Germany

Expenditure



EUR **72.0** billion
The Germans
love the world

Expenditure of the Germans on their trips abroad

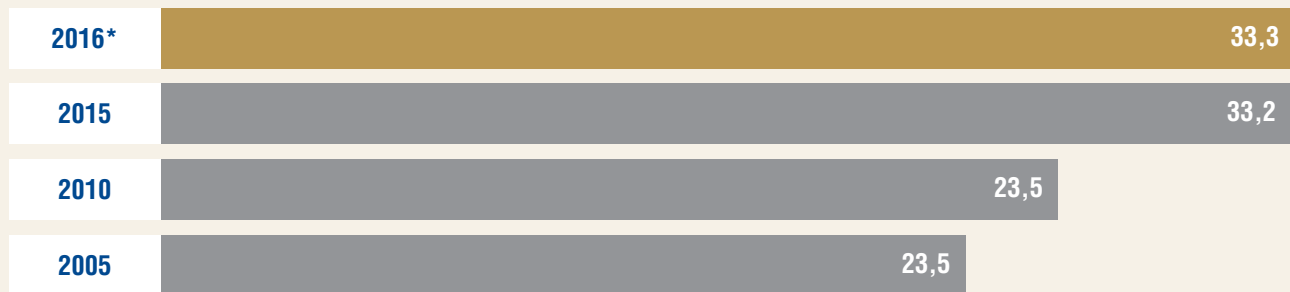
Expenditure in EUR billion



Income of Germany from international travel

The income of Germany from international travel rose by 0.3% to now EUR 33 billion.

Income in EUR billion

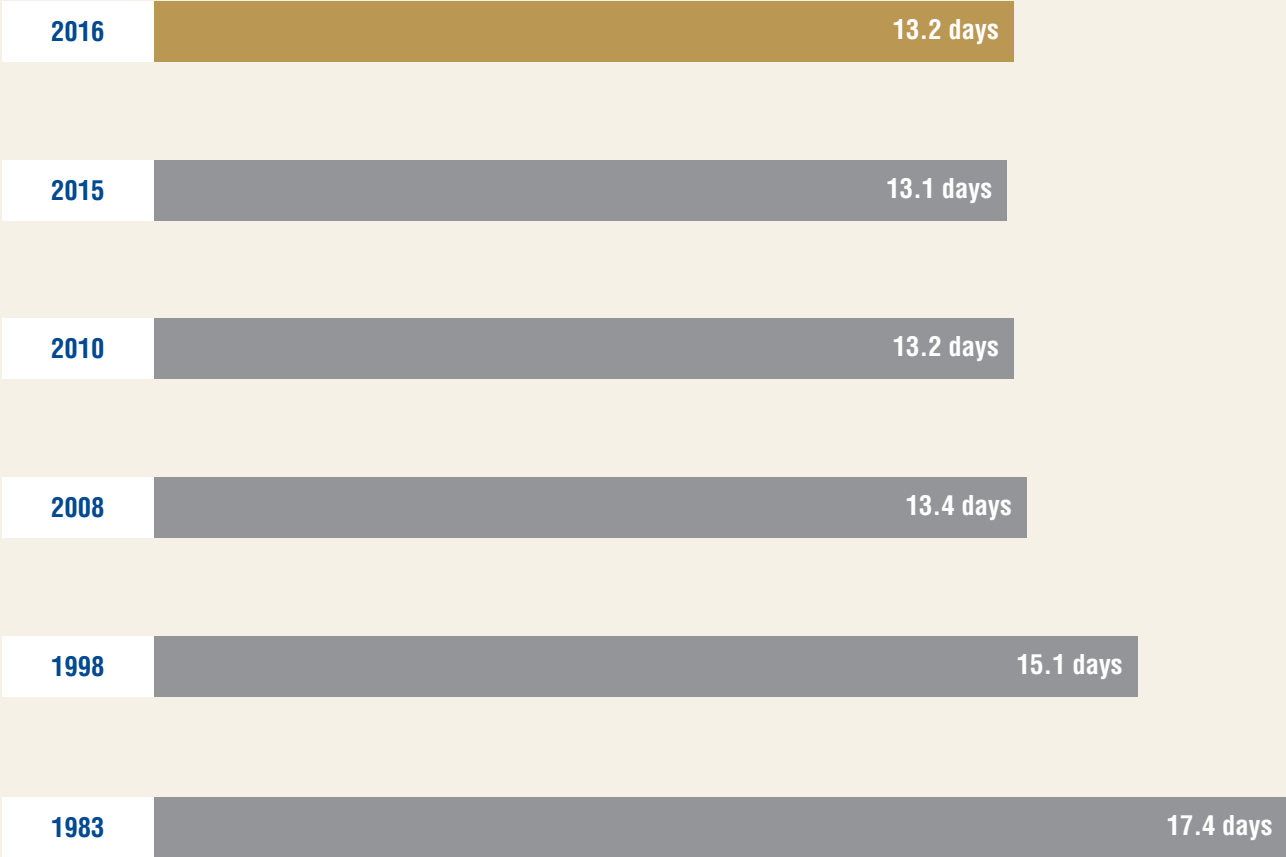


Average travel duration in 2016



What is the average duration of a holiday trip?

Duration of stay in days

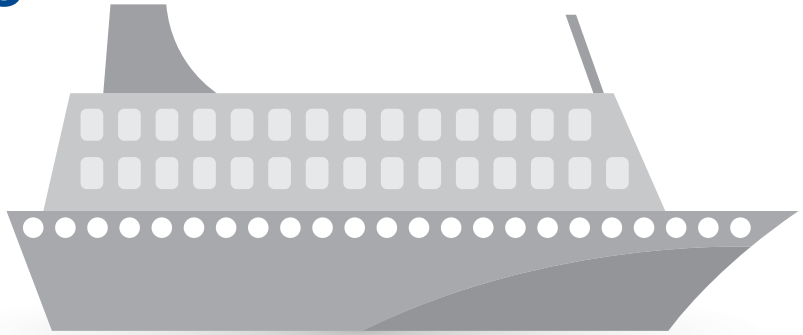


Source including graphics on page 18: GfK TravelScope
*modified calculation method from 2010 onwards

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

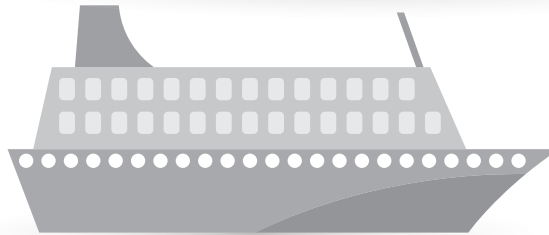
2.5 million

in 2016



1.7 million

in 2010



965,000

in 2005



567,000

in 2000



309,000

in 1995



809 %

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	2015	2016
Sales revenues	EUR 2.9 billion*	EUR 3.4 billion*
Number of passengers	1,812,968	2,018,142
Average travel price	EUR 1,580*	EUR 1,675*
Average travel duration	8.7 nights	8.9 nights

River cruises	2015	2016
Sales revenues	EUR 435 million*	EUR 449 million*
Number of passengers	423,635	435,586
Average travel price	EUR 1,027*	EUR 1,030*
Average travel duration	7.2 nights	6.9 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
Strong partner of the sector

The Germans like to travel. They are worldwide amongst the nations which spend most for their trips abroad. The tourism industry in Germany is hence an important economic factor and secures around 2.9 million jobs. The German Travel Association (DRV) is the leading special interest group of the tourism industry. We defend above all the interests of tour operators and travel agents.

DRV is backed by a special economic clout: our members represent the lion's share of the sales revenues on the tour operator and travel agency market. Several thousands of member companies, including numerous service providers, turn us into a strong community. Learn more about us, our goals, our missions and our commitments.

President	Norbert Fiebig
Managing Director	Dirk Inger
Head of Communication	Torsten Schäfer
Press Officer	Dr. Ellen Madeker
	Email presse@drv.de
	Homepage www.drv.de/pressecenter
	Facebook www.facebook.com/DRV.de

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DRV Deutscher ReiseVerband e. V.
DRV German Travel Association
Schicklerstraße 5 – 7, 10179 Berlin
Deutschland / Germany
Phone +49 30 28406-0, Telefax +49 30 28406-30