

The German Travel Market

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2021

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BUSINESS TRAVEL MARKET

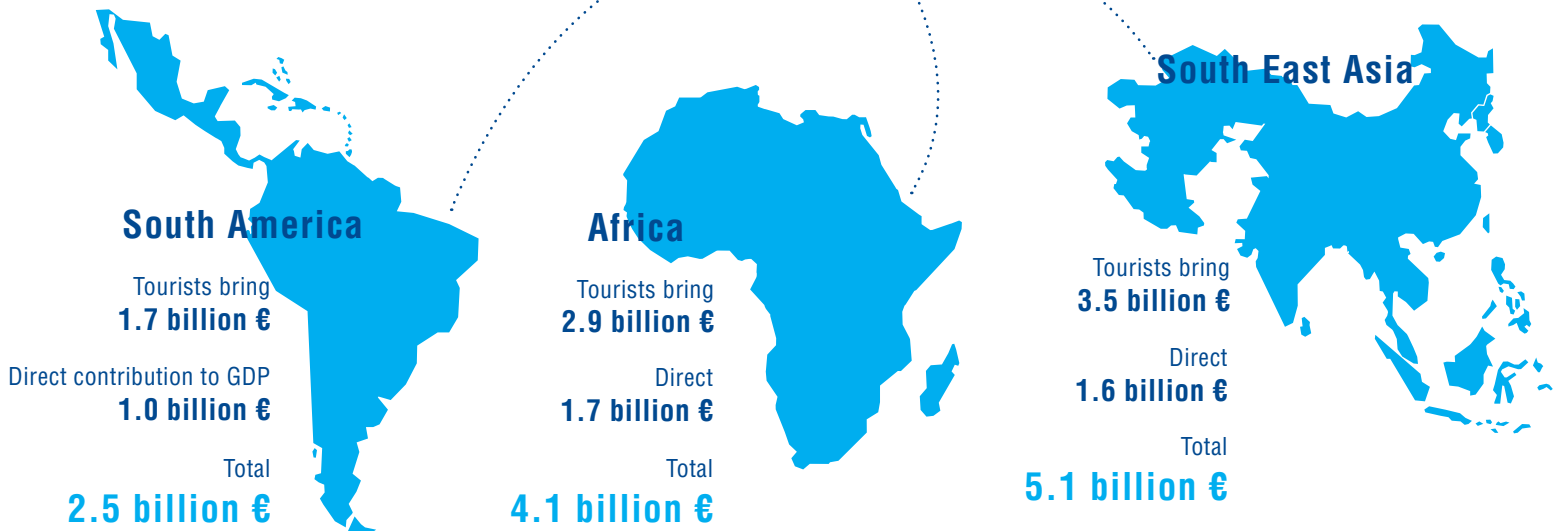
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Development in the German business travel market 2020

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

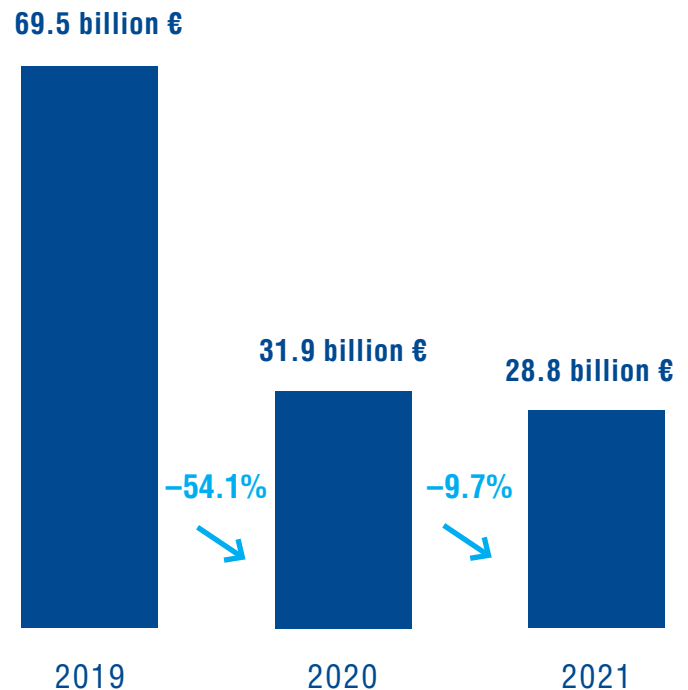
In the years before the Corona pandemic, tourism had only one path: growth. Year after year, travel spending by Germans increased significantly - until most recently in 2019 to **69.5 billion euros**. Tourism was considered a growth sector of the German economy.

The turnaround came in the Corona year 2020 - travel expenditure fell by 54 per cent to **31.9 billion euros**. In 2021, travel spending fell further to 28.8 billion euros. The effects are massive: travel agencies, tour operators and many other companies in the industry are struggling to survive. Political support is needed to safeguard the almost **three million jobs** in the tourism industry.

The decline in tourism also has consequences in many travel countries, as Germans were among the largest net foreign exchange earners in international travel in the pre-Corona years.

In 2021, the share of travel expenditure fell to **1.8 per cent** (2019: 4.6 per cent) of the total private consumption of German citizens.

German travel spendings slump



The ECONOMIC IMPORTANCE

of the tourism industry at a glance



55.1 million

holiday trips (of which > 36% 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



47.8 million

Passengers on holiday trips of 5 days or more (previous year: 44.6 million)



1.2

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



67.8%

Travel intensity (percentage of population travelling)



2.9 million

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



310.3 million

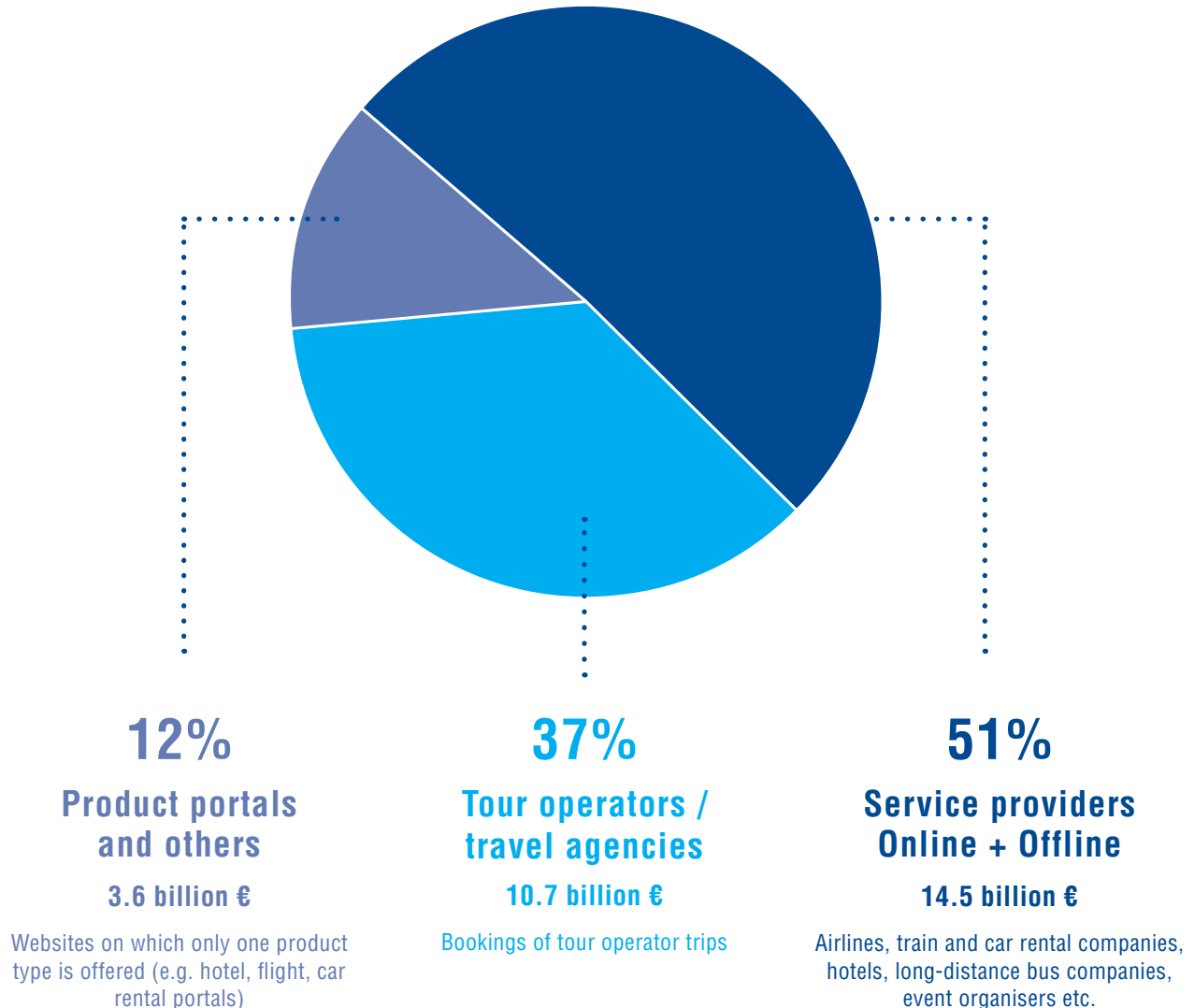
Overnight stays by residents and non-residents in Germany in 2021 (+2.7%)



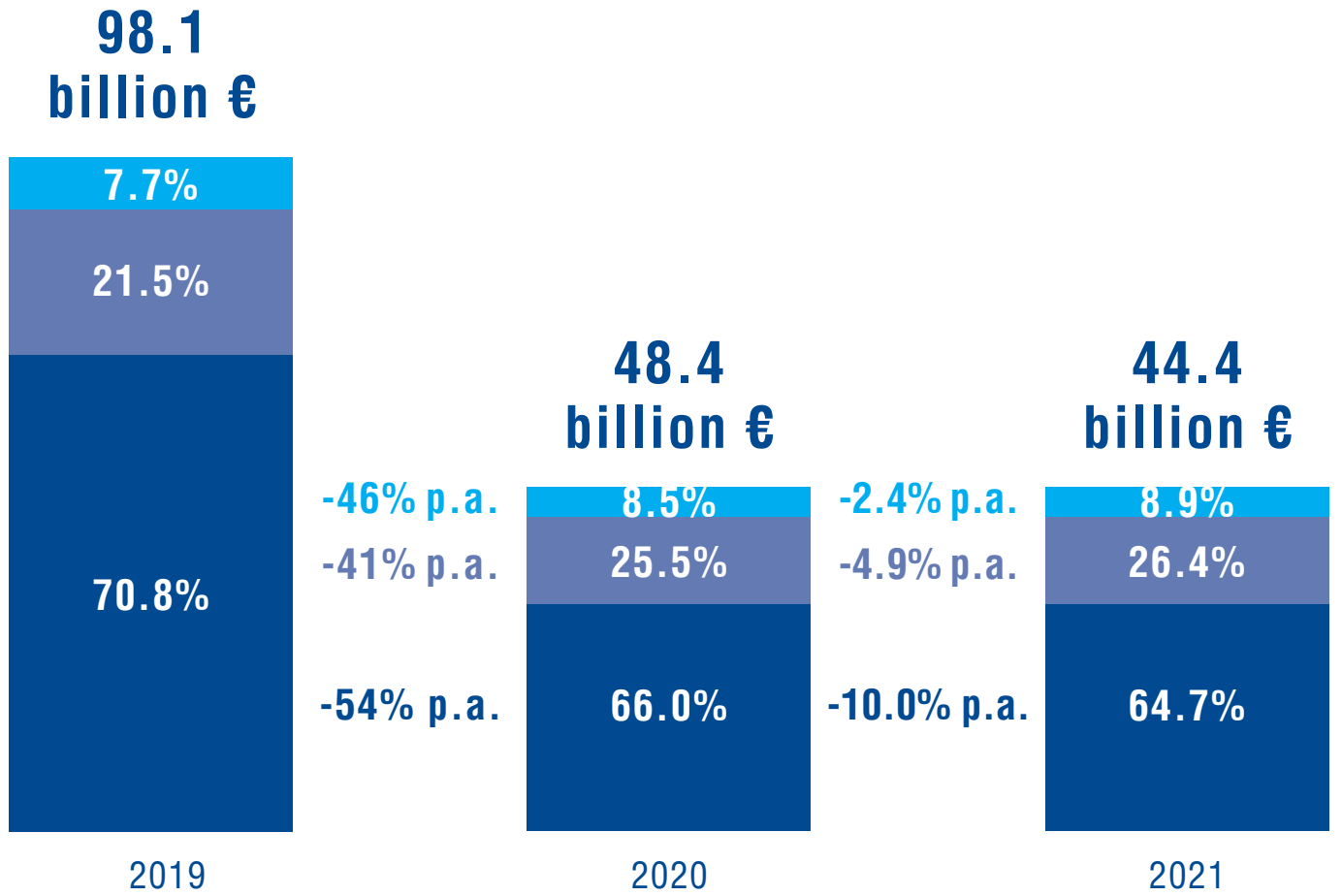
≈37%

of the journeys of German citizens are spent in Germany in 2021.

Market structure in the GERMAN TOURISM MARKET 2021



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



● 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



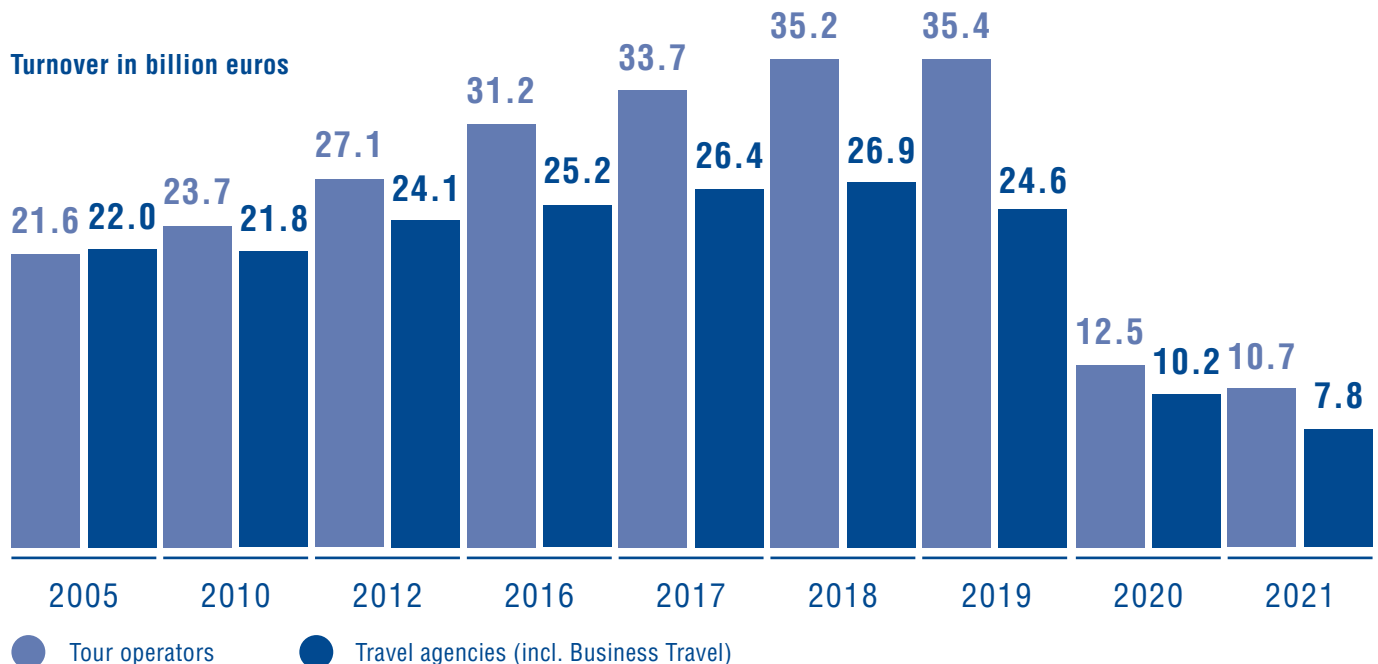
12.5 billion €
Total turnover
2020



10.7 billion €
Total turnover
2021

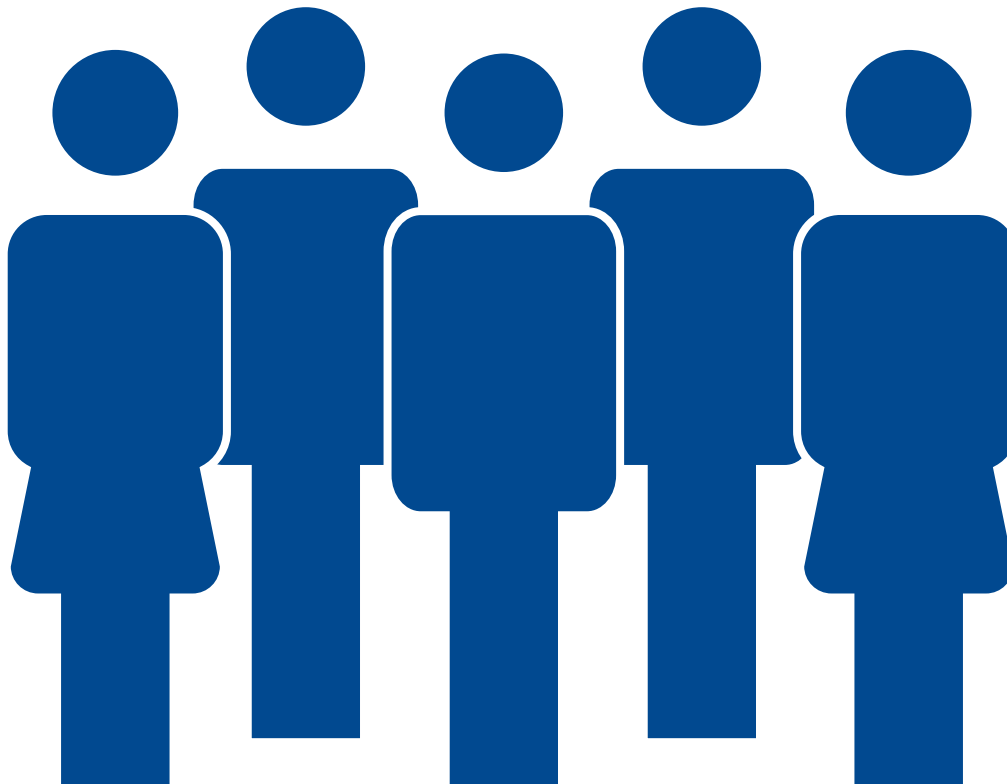


Turnover in billion euros



Employees of **TRAVEL AGENCIES AND TOUR OPERATORS**

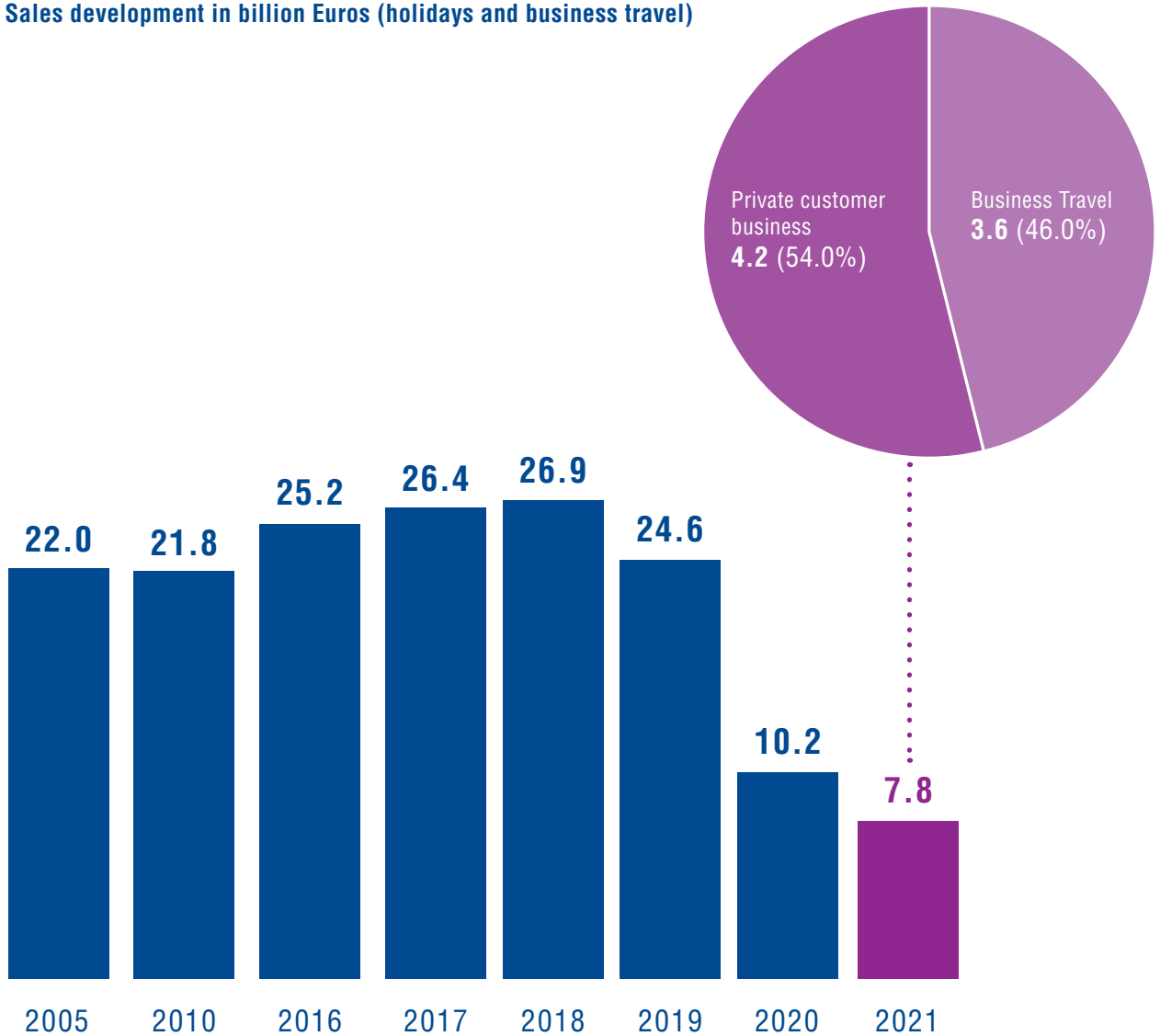
In 2021, travel agencies and tour operators employed 65,760 persons
(previous year: 65,919).



TRAVEL AGENCIES

make a difference

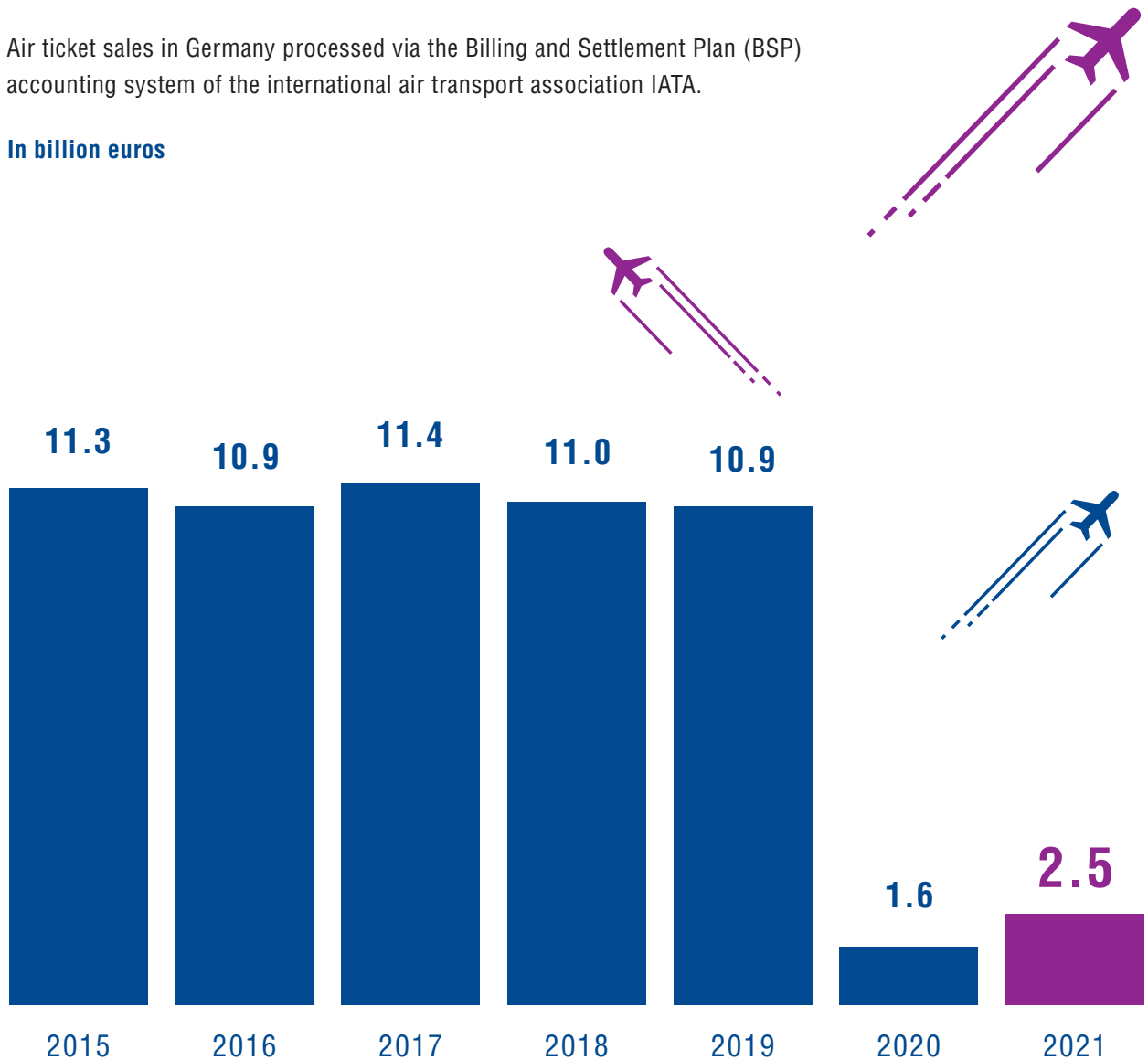
Sales development in billion Euros (holidays and business travel)



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

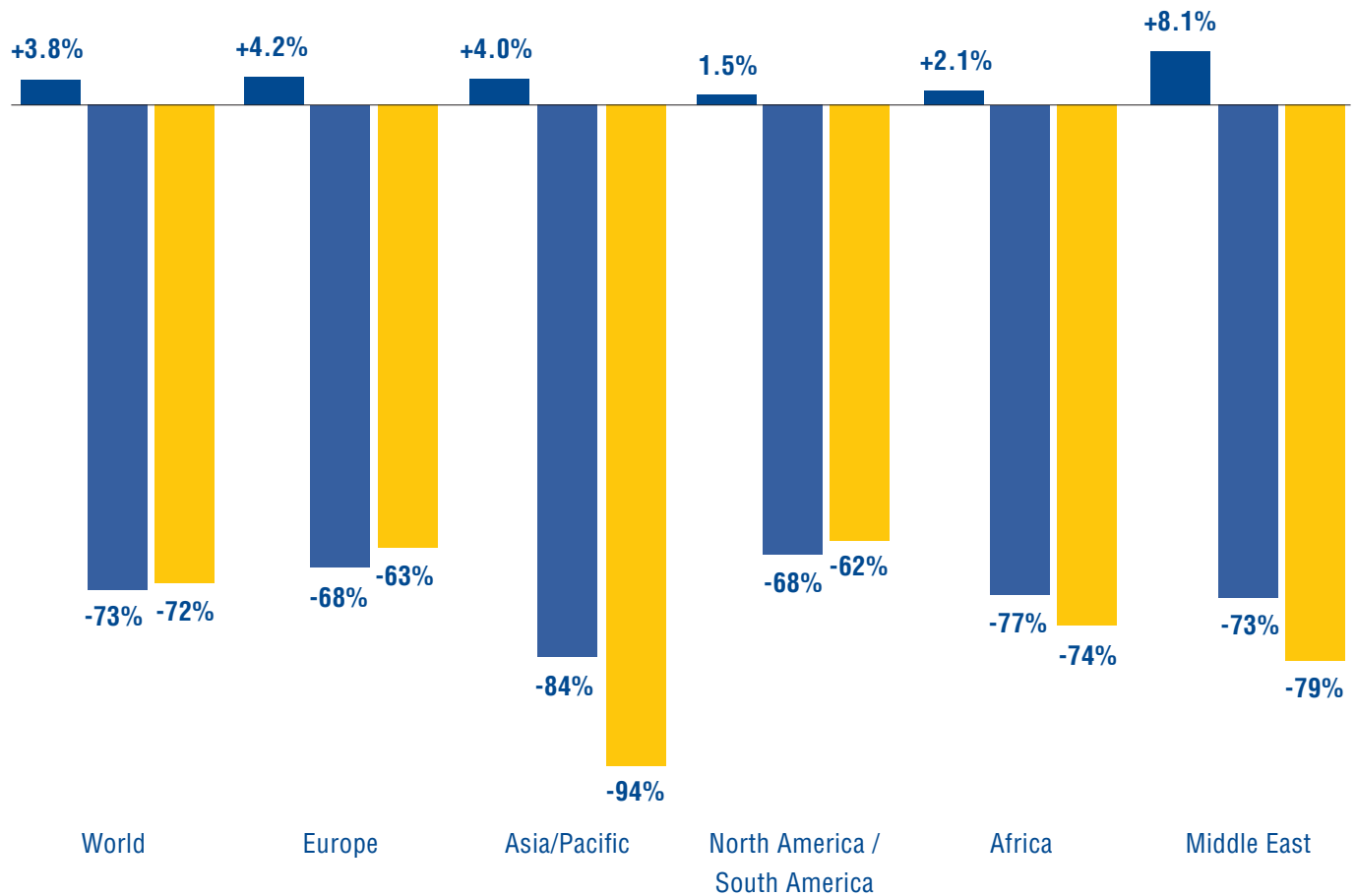


DESTINATIONS IN GERMANY AND ABROAD



International TOURIST ARRIVALS

After the dramatic decline in global tourism arrivals in 2020, a slight increase of 4% to 415 million arrivals can be observed in 2021. However, even this figure is still far from the 1.5 billion tourist arrivals in 2019.



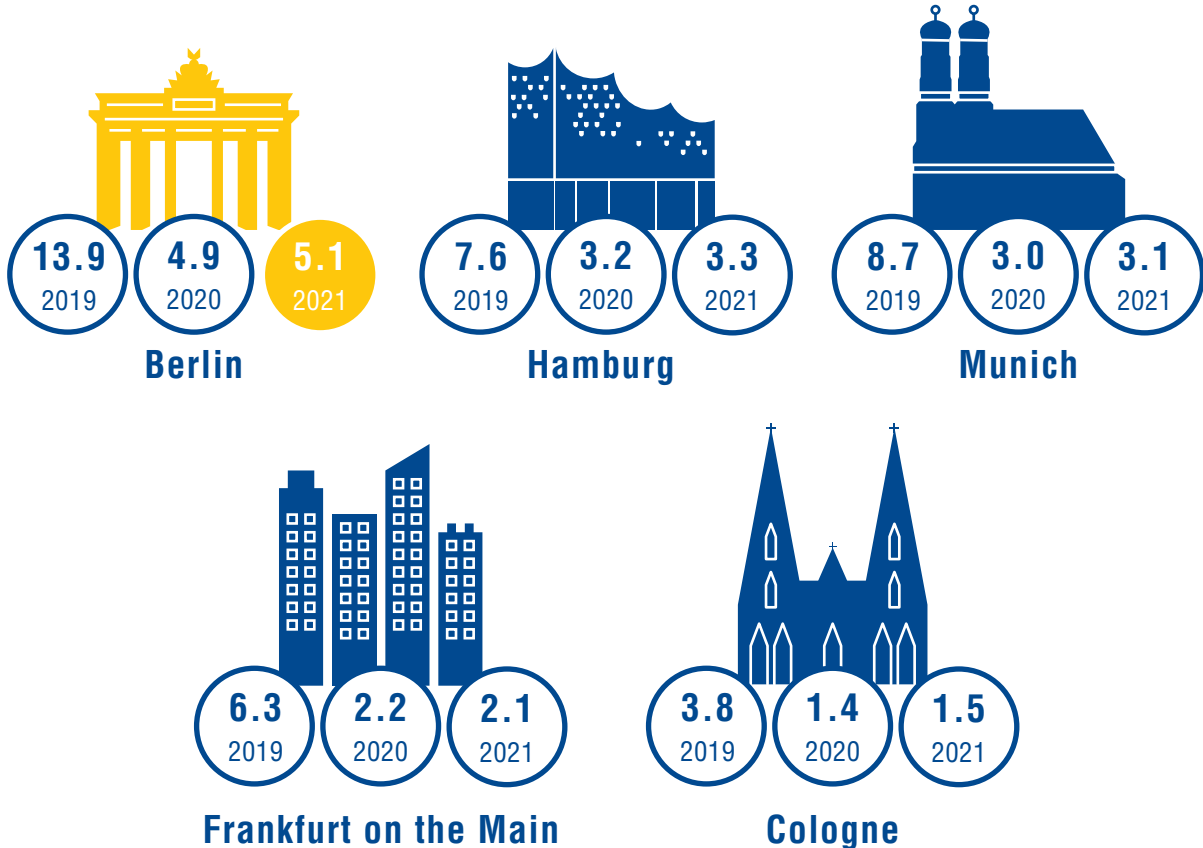
● 2019 ● 2020 ● 2021

Rate of change compared to previous year. Rate of change 2021 compared to 2019.

The 5 most popular **CITY TRIPS** in Germany 2021

The worldwide slump in tourism is also reflected in the number of visitors to city breaks.

Guest arrivals, in million visitors



The GERMAN HOLIDAY DESTINATIONS worldwide

Number of holiday trips of five days or more 2021

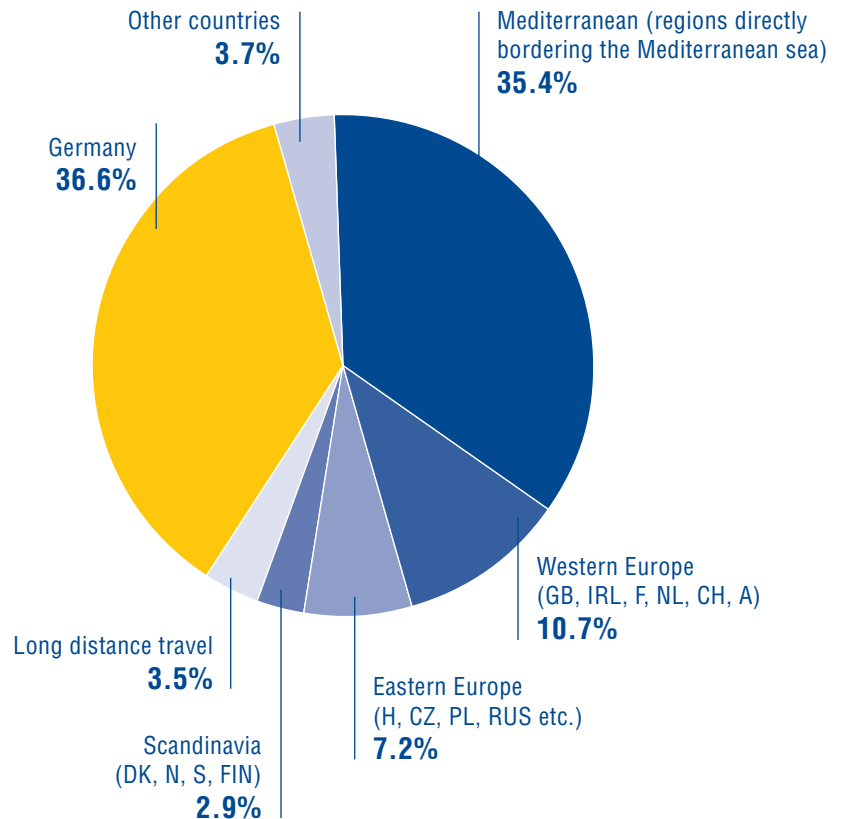


55.1 million

long holiday trips of the
Germans

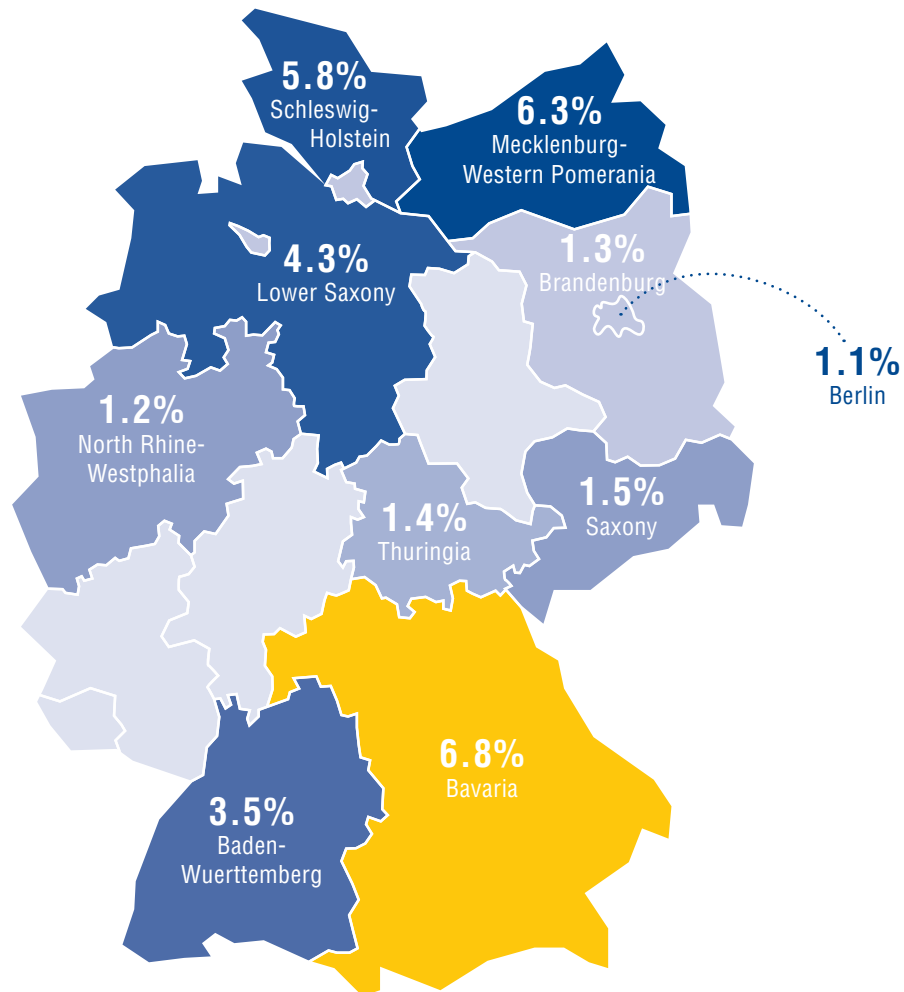
63.4%
thereof abroad

36.6%
thereof Germany



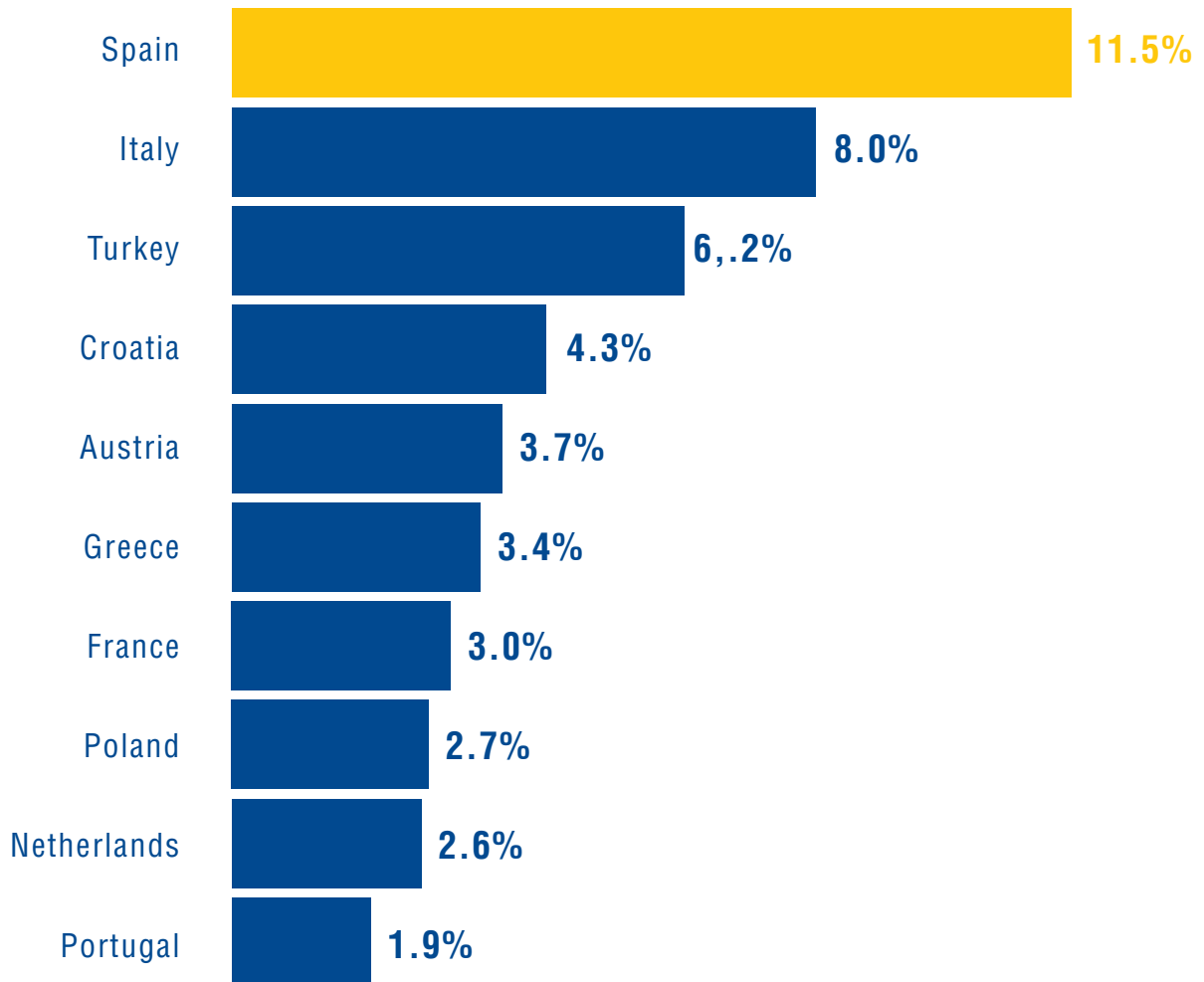
The 10 most popular DOMESTIC DESTINATIONS within Germany

Share of all holiday trips of five days or more 2021



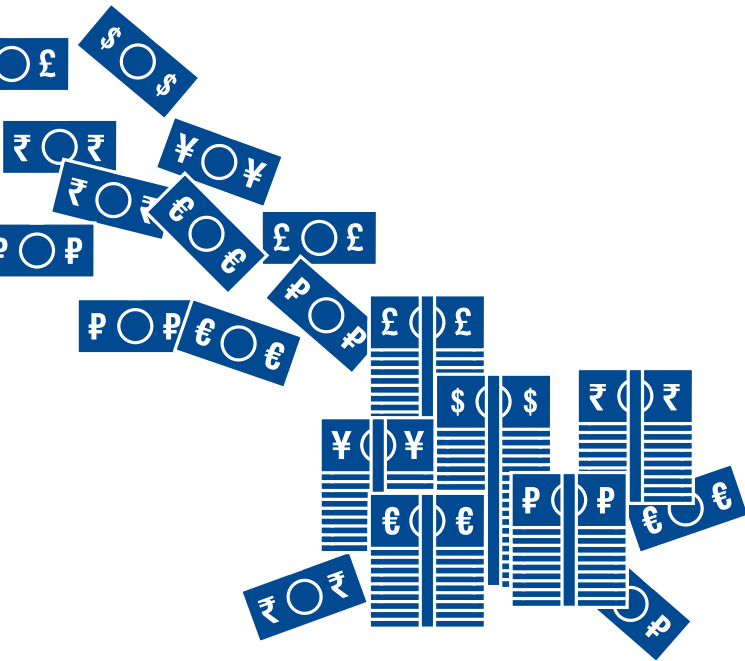
The 10 most popular **FOREIGN DESTINATIONS** for Germans

Share of all holiday trips of five days or more 2021



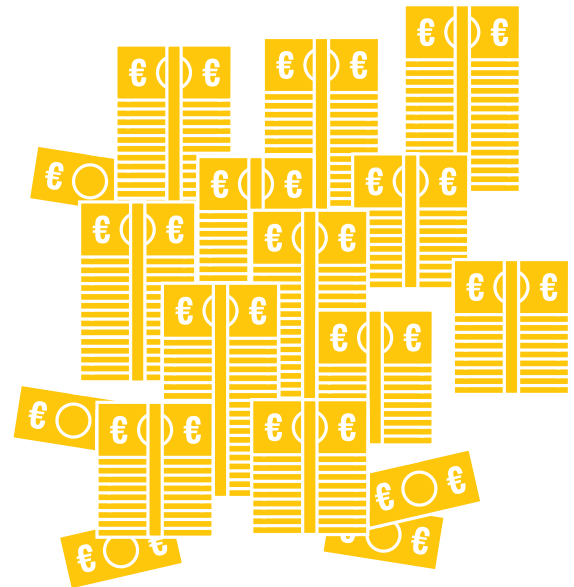
TRAVEL INCOME AND TRAVEL EXPENSES

of Germans



Income

15.8 billion €

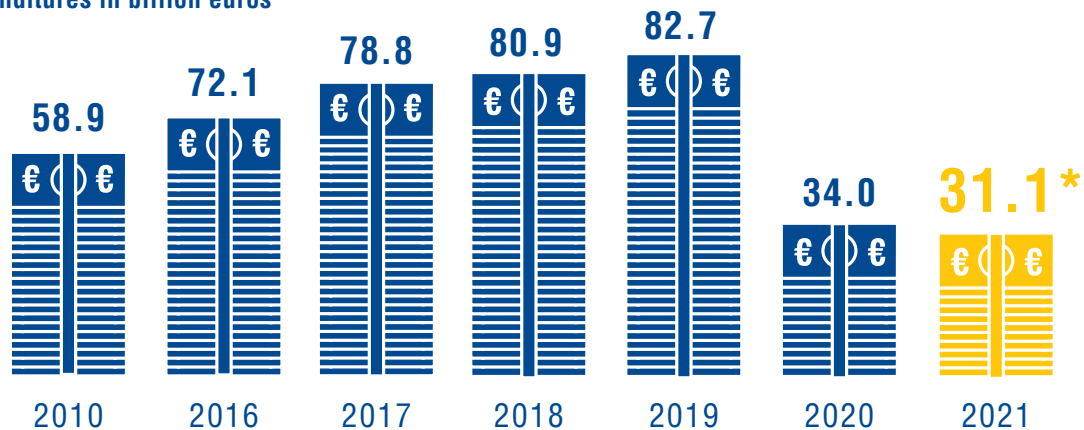


Expenses

31.1 billion €

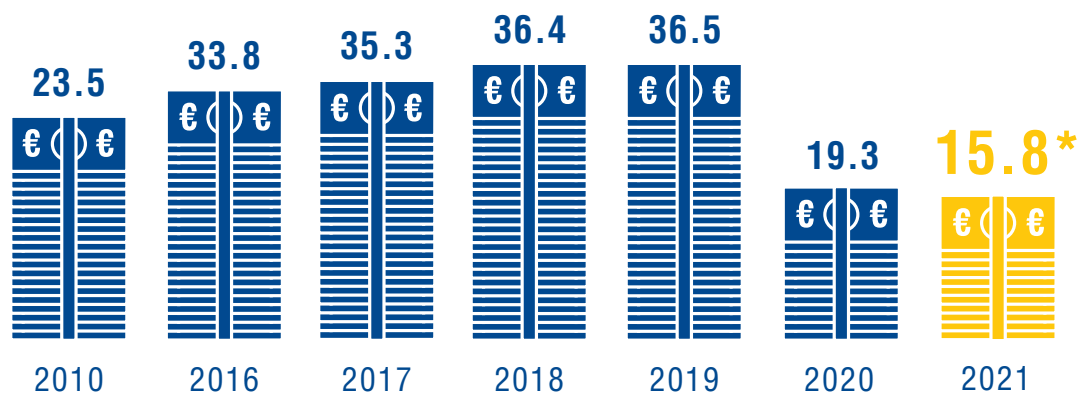
Expenditures by Germans on their trips abroad

Expenditures in billion euros



Germany's income from international travel

Income in billion euros



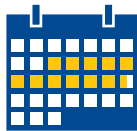
The **AVERAGE DURATION** of main holiday trips

Ø length of stay in days (main holiday trips)

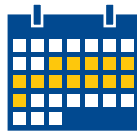


12.2 days

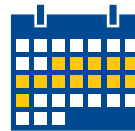
was the average duration
of travel in 2021.



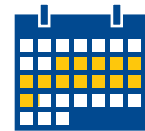
11.6
2020



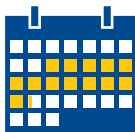
13.0
2019



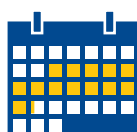
13.0
2018



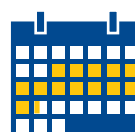
13.1
2017



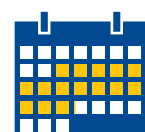
13.2
2016



13.2
2010



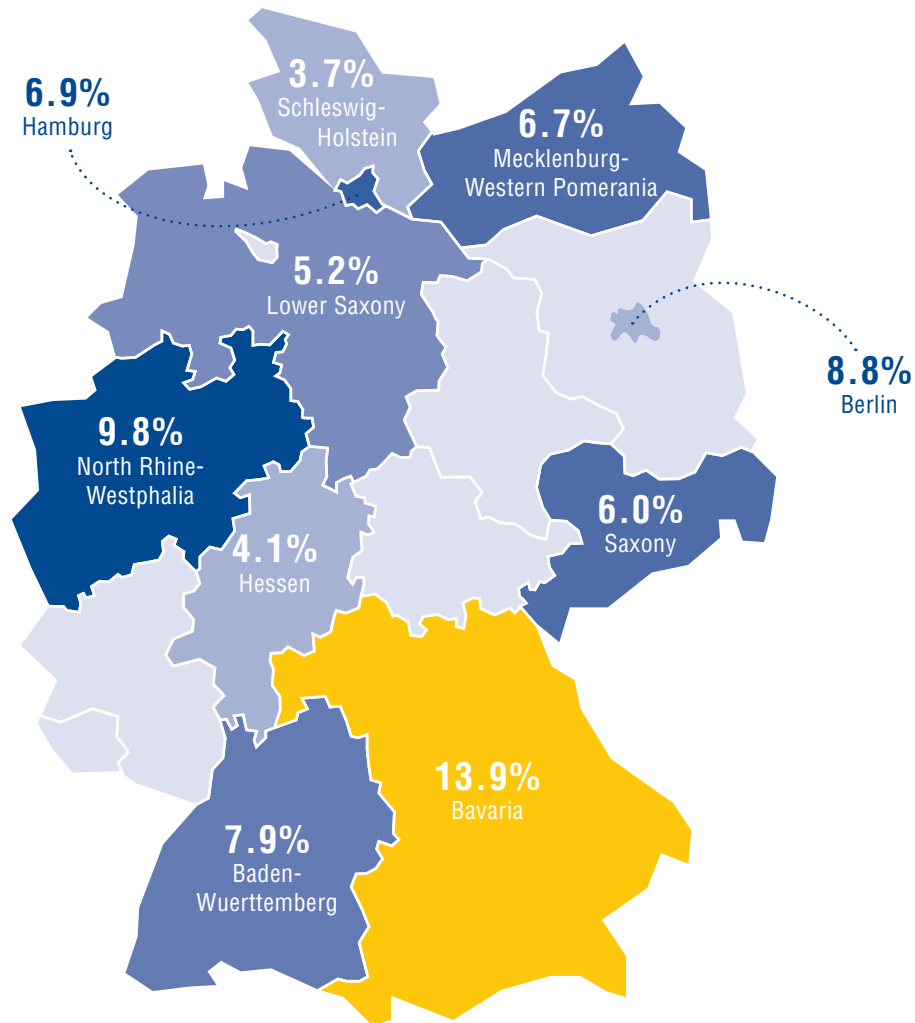
13.4
2008



15.1
1998

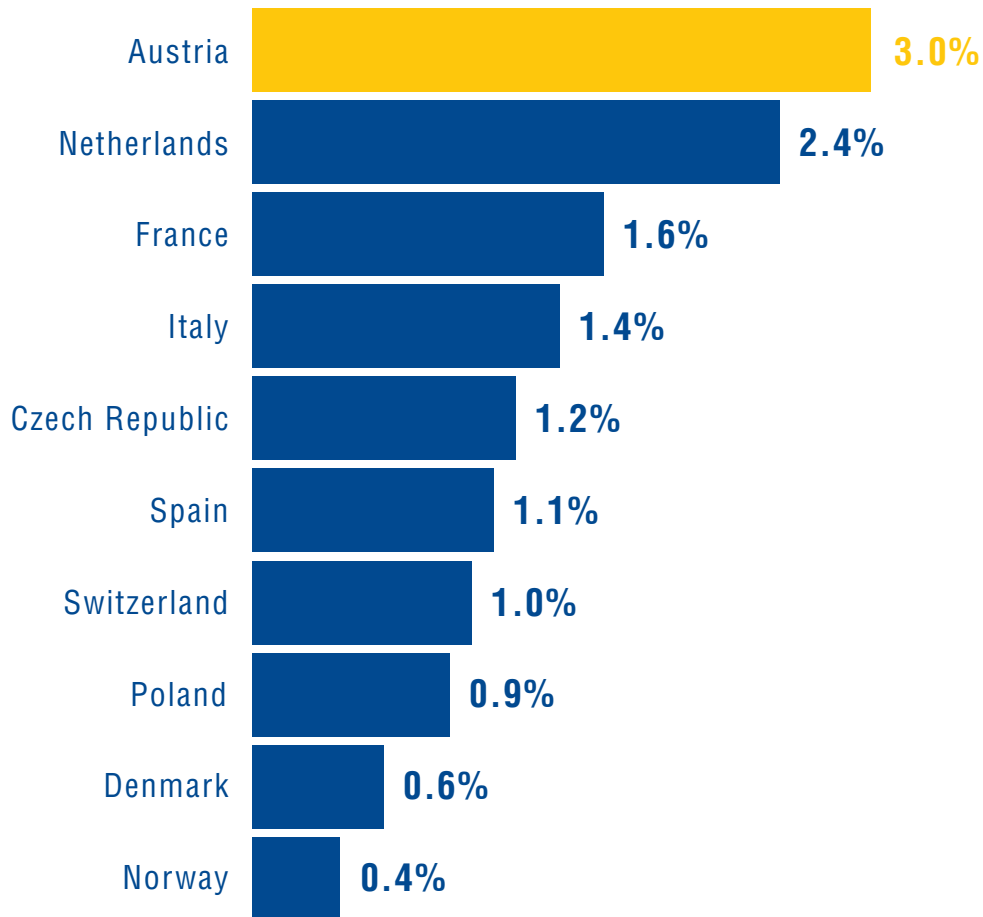
The 10 most popular SHORT TRIP DESTINATIONS of Germans in Germany

Share of all short breaks, travel duration two to four days in 2021



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

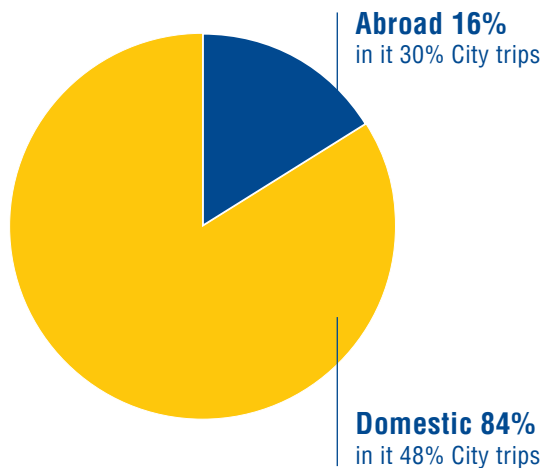
Share of all short breaks, travel duration two to four days in 2021



SHORT BREAKS IN GERMANY AND ABROAD

by Germans

Travel duration two to four days in 2021



50.9 million

total trips

Day trips made by Germans 2021

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



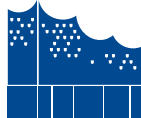
The most popular CITY DESTINATIONS for Germans

Domestic destinations: Share of all short breaks, travel duration two to four days in 2021



8.8%

Berlin



6.9%

Hamburg



3.2%

München



2.5%

Dresden



2.1%

Köln



1.5%

Bremen

Foreign destinations: Share of all short breaks, travel duration two to four days in 2021



0.7%

Wien



0.6%

Paris



0.5%

Amsterdam



0.3%

Oslo



0.3%

Prag



0.3%

Barcelona

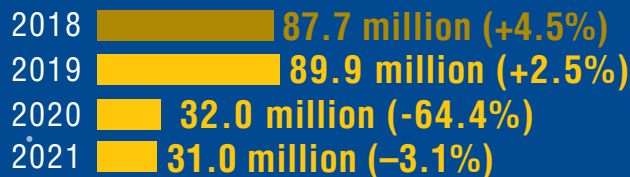
All OVERNIGHT STAYS in Germany

Tourism in Germany recovered only slightly in 2021 from the dramatic declines in 2020. The total number of overnight stays in Germany rose by 2.7% to 310.3 million. However, this was exclusively due to visitors from Germany, whose overnight stays increased by 3.3% to 279.3 million, while the number of overnight stays by foreign visitors fell by 3.1% to 31.0 million.

Overnight stays of German visitors



Overnight stays by foreign visitors



End 2020:



21,021
Businesses



1,308,945
Beds



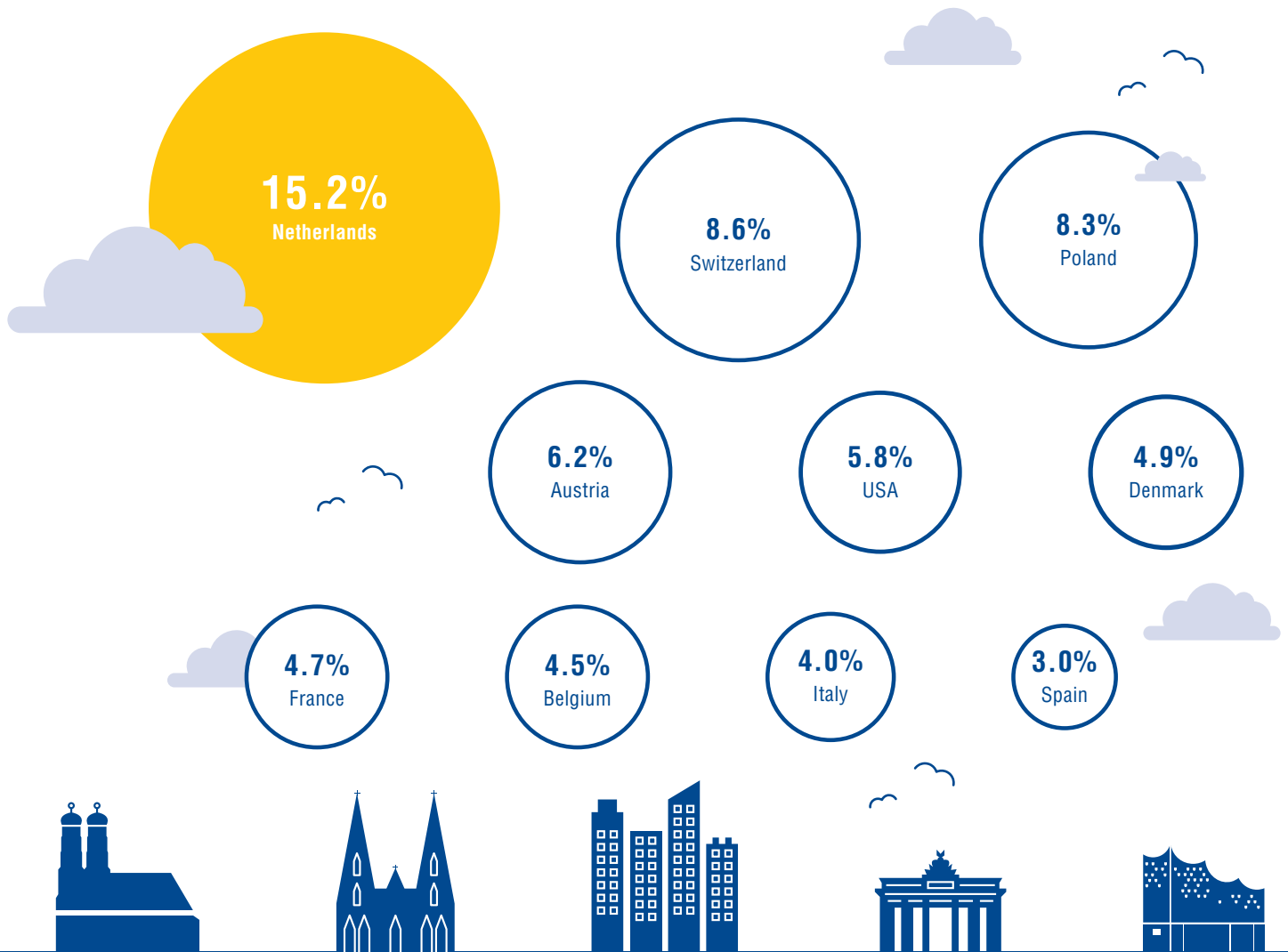
87€
Average room rate



29.6%
Average room occupancy

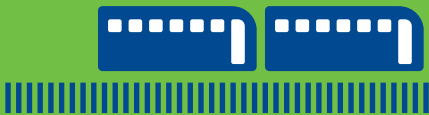
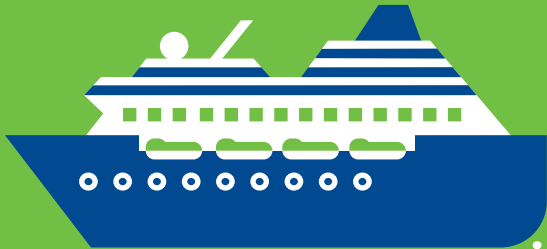
The most important SOURCE MARKETS for Germany

Share of all overnight stays from abroad 2021



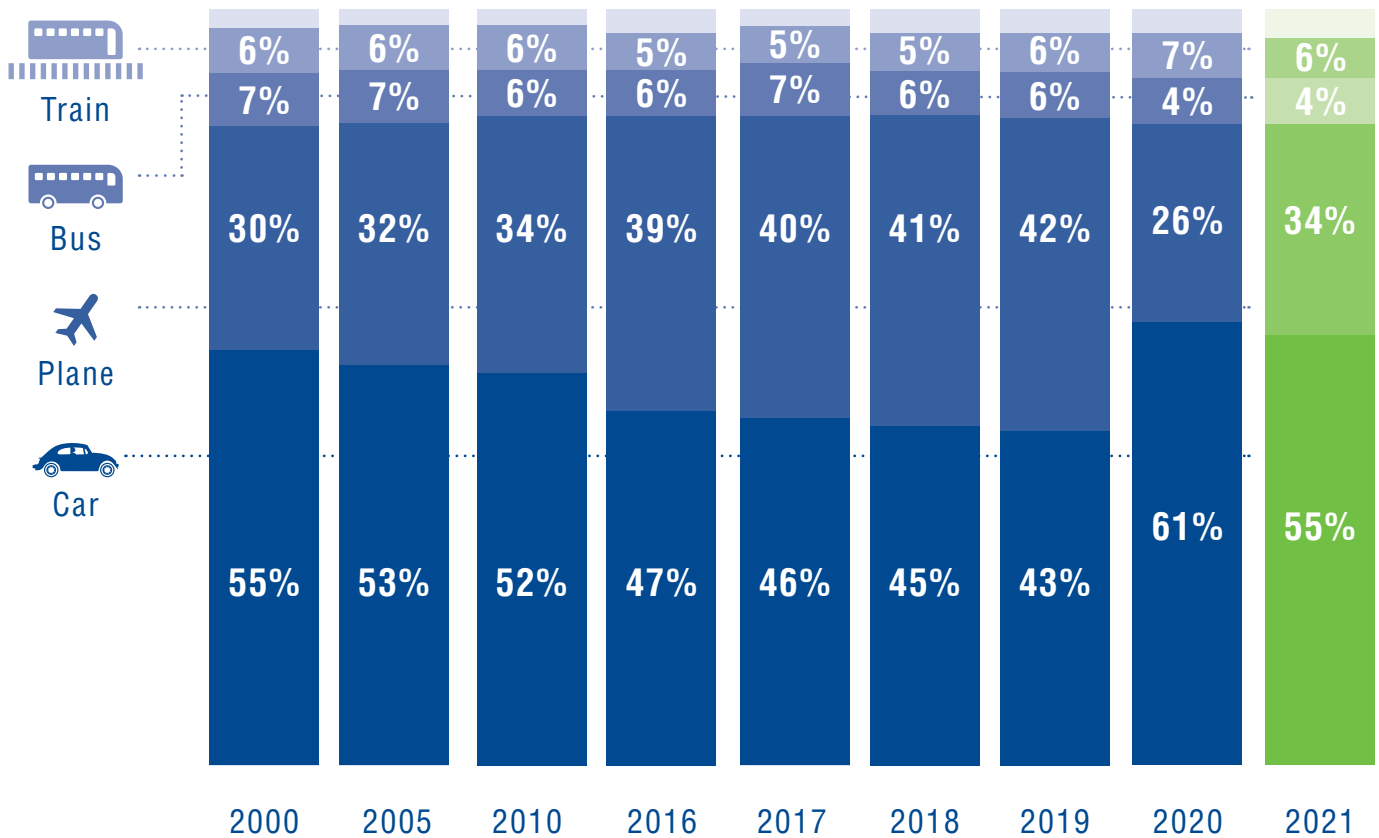


MEANS OF TRANSPORT



The most popular MEANS OF TRANSPORT for holiday trips

German holiday trips of 5 days or more, percentage share

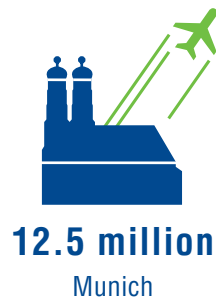
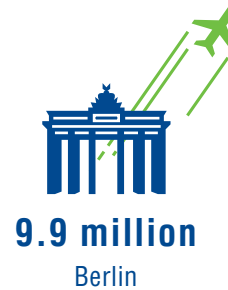
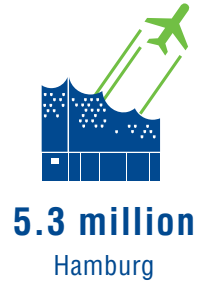
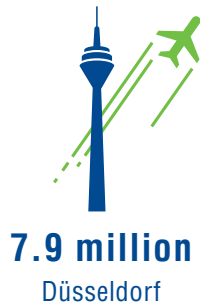


Difference to 100 percent: other means of transport such as ship

Source: Reiseanalyse 2022

The 5 biggest **AIRPORTS** in Germany

Number of passengers in millions in 2021



PASSENGER VOLUME

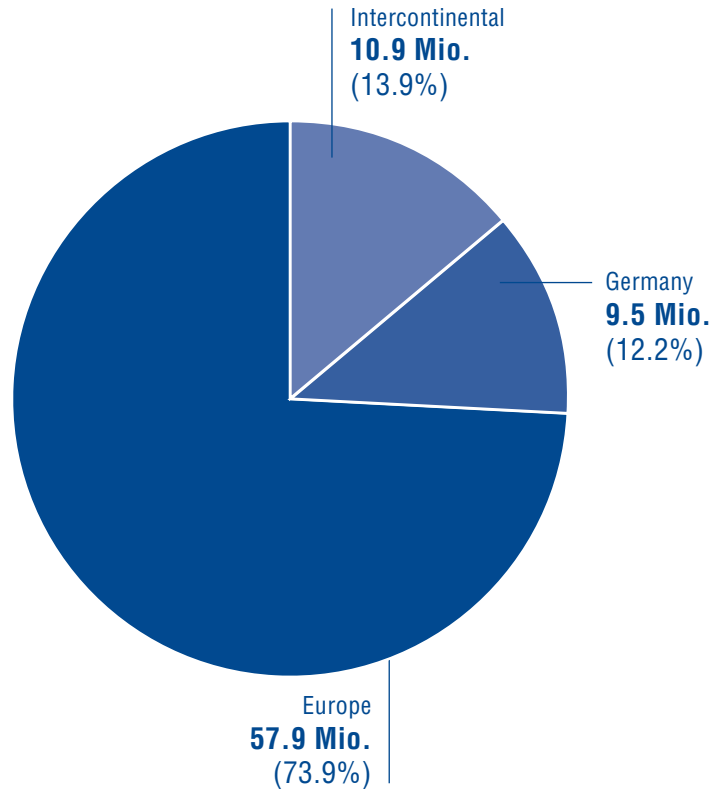
in aviation

Air traffic recovered only slowly in 2021. A total of **78.6 million** passengers took off and landed at German airports (2020: 63.0 million). This is an increase of **23.0%** compared to 2020, but still a decline of **68.6%** compared to the pre-Corona year 2019.



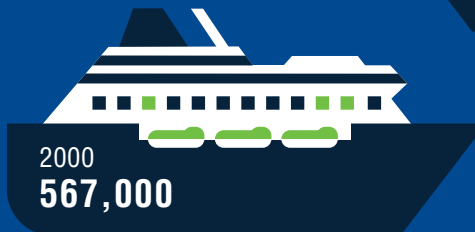
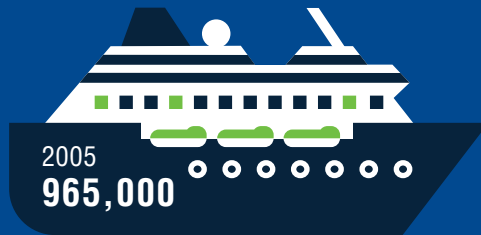
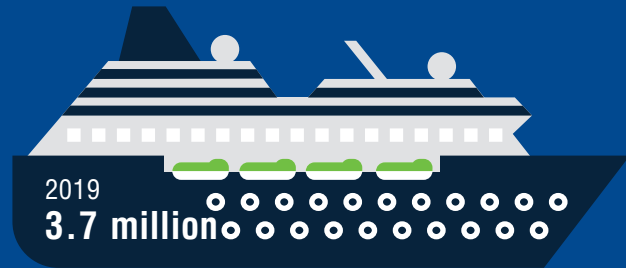
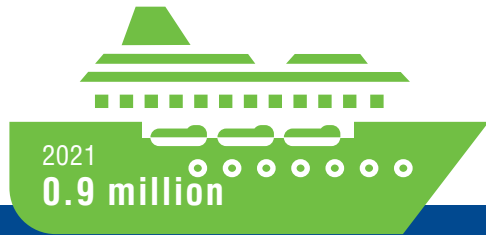
78.6 million

Total air passengers (excluding transit)



CRUISES

Passengers on rivers and oceans



The CRUISE MARKET Germany

Ocean Cruises

	2018	2019	2020	2021
Number of passengers	2,602,900	2,943,400	1,097,900	736,600
Expenses in advance, in million euros	4,786.6	5,121.0	2,078.8	907.9
Expenses in advance, per person/trip	1,839 €	1,740 €	1,893 €	1,233 €
Ø Travel time	10.4 nights	10.9 nights	10.6 nights	8.8 nights

River Cruises

	2018	2019	2020	2021
Number of passengers	685,200	727,400	307,400	209,400
Expenses in advance, in million euros	815.0	853.2	300.0	241.2
Expenses in advance, per person/trip	1,189 €	1,173 €	976 €	1,151.9 €
Ø Travel time	8.1 nights	8.3 nights	7.4 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** 2020

	2018	2019	2020
Number	189.6 million	195.4 million	32.7 million
Average costs	310 €	312 €	323 €
Costs per person / day	162 €	162 €	161 €
Total overnight stays Business Travel	72.5 million	74.3 million	17.4 million
Thereof companies with 10-500 employees	41.3 billion €	42.3 billion €	8 billion €
Thereof companies with >500 employees	12.2 billion €	13 billion €	2.1 billion €
Total costs	53.5 billion €	55.3 billion €	10.1 billion €



In 2020, there were a total of 32.7 million business trips from Germany.

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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