

Germany

Tourism in the economy

The growing tourism sector in Germany generates over EUR 105 billion in gross value added, equivalent to 3.9% of total GVA. Indirect effects are estimated to account for an additional EUR 76.1 billion. Over 2.9 million workers are directly employed in the tourism industry, equivalent to 6.8% of total employment.

International tourism receipts accounted for 3% of total exports in 2015. 80.8 million international visitors stayed overnight in Germany in 2016, an increase of 1.4% on 2015. The three main source markets are the Netherlands, Switzerland and the United States.

In 2016, there were 447.2 million overnight stays in accommodation facilities with ten beds or more (including camping), up 2.5% on the previous year. Domestic tourism accounts for 82% of these stays. Visitor spending exceeded EUR 287 billion in 2015, with EUR 224.6 billion (78%) of tourism revenue arising from domestic tourism, whereas visitors from abroad spent EUR 39.6 billion (14%).

Tourism governance and funding

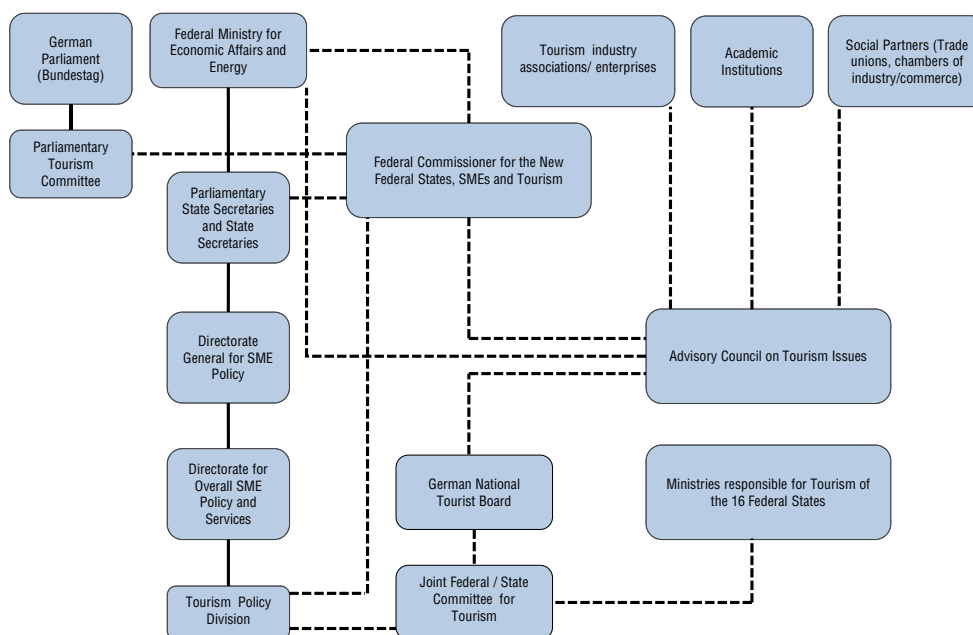
The Federal Government is primarily responsible for establishing an appropriate policy environment for tourism, with the 16 Federal States (*Länder*) developing, shaping and promoting tourism policy. The Federal *Länder*-Committee on Tourism meets twice a year, fostering the exchange of information and coordination of measures involving two or more of the *Länder*.

The Federal Minister for Economic Affairs and Energy (BMWi) has lead responsibility for tourism policy. The Federal Government's Commissioner for the New Federal States (*Länder*), SMEs and Tourism serves as the government's central point of contact within the Federal Government and with the German Parliament (Bundestag), especially with the Parliamentary Tourism Committee. The Federal Minister for Economic Affairs and Energy is supported by the Advisory Council on Tourism Issues, which brings together the interests of government, commerce, academia, trade unions and others.

The *Länder* ministries responsible for tourism devise, implement and fund policies to promote tourism development. Local tourism offices coordinate the work of small, local enterprises, promote product design and undertake relevant marketing activities. Each of the *Länder* has a tourism association representing the interests of regional and local/municipal organisations and/or a destination marketing organisation.

The German National Tourist Board (GNTB) is responsible for the marketing of Germany overseas. GNTB works closely with the tourism marketing organisations of the *Länder* and co-operates across the world with the German Chambers of Commerce Abroad, the German foreign missions, Germany Trade & Invest (Federal economic development agency), as well as the Federal cultural institutes (*Goethe Institut*).

Germany: Organisational chart of tourism bodies



Source: OECD, adapted from the Federal Ministry for Economic Affairs and Energy, 2018.

Budgetary funds available to BMWi for tourism are concentrated in two main areas:

- Institutional support for the GNTB. Since 2015, this has increased by EUR 1.6 million to around EUR 30.6 million a year, with the additional funds channelled *inter alia* into strengthening activities to target emerging source markets in Asia, particularly China, India and Arab Gulf States, as well as establishing new DZT agencies in locations well placed for additional source markets.
- Promotion of projects to enhance the performance of tourism, amounting to EUR 1.6 million in 2017.

The Joint Federal Government-Länder Scheme for Improving Regional Economic Structure (GRW) is the central instrument of the Federal Government’s regional policy. The GRW project funding is provided through investments in trade and industry, including the tourism economy, and municipal investments in economic infrastructure, including basic infrastructure for tourism. The average portion of the GRW budget set aside for investment in the tourism industry and tourism infrastructure has been 14% over the past five years, an annual average of EUR 167 million (divided evenly between federal and Länder contributions). Other federal ministries fund measures and projects in their respective policy fields which benefit tourism in Germany.

Finance for tourism at municipal, regional, and Länder level derives from a range of different sources. In addition to public funds, revenue is generated from spa and tourism taxes, as well as from bed taxes.

Tourism policies and programmes

The focus is on supporting small and medium-sized enterprises (SMEs) in the tourism industry so that they can develop their competitive position and realise their potential for growth and employment.

Competition for skilled professionals has intensified across the entire economy and is impacting the continued development of tourism. The tourism industry reports declining numbers of trainees, comparatively high drop-out rates, and high staff turnover levels. It is a challenge to make the industry attractive to the next generation.

The German government's tourism policy focuses not only on economic goals, but also on social and structural aspects. One of the biggest challenges is to enable the rural regions, especially economically weak regions, to reap greater benefits from tourism and to provide opportunities for rural enterprises to benefit from the growing tourism sector. Through strengthening local retail demand and using public facilities, tourists help to maintain local infrastructure and income in rural areas, and contribute to the development of entire regions.

Cultural tourism is a hallmark of tourism in Germany and many cultural destinations, mainly cities, attract tourists based on their museums, theatres, castles and palaces. Yet there is untapped potential in more remote regions, where traditions and customs provide variety in travel experiences.

BMWi is taking a fresh approach with its project *The Destination as a Stage: How can Cultural Tourism Make Rural Areas Successful?*. Five rural regions, each with a different level of tourism sophistication, are being coached to function as role models for other regions by demonstrating the benefits of the connection between culture and tourism, inspiring other destinations to develop their own initiatives. This work will continue into 2018.

Accessibility for all remains a tourism policy priority in Germany, including the provision of comprehensive and reliable information concerning barrier-free offers along the tourism service chain for people with disabilities. The "Tourism for All" project is funded by BMWi to support the creation of a nation-wide labelling and certification system (Box 1.17).

Digitisation is an increasingly important issue and smaller businesses especially are struggling to keep up. BMWi is conducting a study on the role of the sharing economy, analysing the market for sharing business models and their macroeconomic effects. The study will consider the need for regulatory action for private accommodation booking platform, with final results available in the first half of 2018.

In addition to a broad approach to sustainability, measures are in place with a strong focus on environmental sustainability. As part of a project on energy-efficient buildings conducted by BMWi in co-operation with the German Energy Agency (dena), the Check-in Energy Efficiency pilot project was initiated in 2015 to demonstrate an economic, ecological and socially acceptable strategy for hotels and hostels of the future. 30 participating hotels and hostels have been given expert energy-efficiency advice.

Sustainable Destinations

A German Tourist Association research project has produced guidelines for tourism destinations wishing to become increasingly sustainable. Sustainable tourism concepts protect the environment and nature while at the same time securing an economic future in their regions, ensuring quality of life and establishing identity. In order to attract more attention to sustainability in the tourism sector, a national competition was launched for the most sustainable tourism destination in Germany, based on 40 ecological, economic, social and management-related criteria. The Swabian Alb Biosphere Reserve was declared the winner in 2017, with further awards in specific categories. Finalists were rewarded through their inclusion in a national advertising campaign at train stations.

Statistical profile

Table 1. Germany: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	122 328 |	123 646	127 791	131 817	136 009
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	338 432 |	339 860	348 484	356 560	366 390
Hotels and similar establishments	194 562 |	196 499	201 846	207 127	213 736
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	30 410 |	31 545	32 999	34 970	35 555
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Netherlands	4 200 |	4 124	4 238	4 326	4 477
Switzerland	2 500 |	2 594	2 778	3 027	3 115
United States	2 300 |	2 310	2 371	2 534	2 558
United Kingdom	2 200 |	2 294	2 415	2 560	2 551
Italy	1 600 |	1 581	1 642	1 715	1 652
Nights in all types of accommodation	68 828 |	71 919	75 577	79 672	80 788
Hotels and similar establishments	55 529 |	58 323	61 312	64 890	65 861
Specialised establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	82 729	87 459	83 008	83 737	..
Same-day visitors (excursionists)
Top destinations					
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..
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TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR					
Inbound tourism					
Total international receipts	40 259	41 657	42 140	42 736	33 818 p
International travel receipts	29 683	31 081	32 609	33 229	33 818 p
International passenger transport receipts	10 576	10 576	9 531	9 507	..
Outbound tourism					
Total international expenditure	75 222	79 474	80 358	81 194	73 284 p
International travel expenditure	65 105	68 794	70 261	69 861	73 284 p
International passenger transport expenditure	10 117	10 680	10 097	11 333	..

.. Not available; | Break in series; p Provisional data
Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933640101>

Table 2. **Germany: Enterprises and employment in tourism**


	Number of establishments ²	Number of persons employed				
	2015	2012	2013	2014	2015	2016
Total	..	..	..	..	..	..
Tourism industries	206 595	1 539 614	1 510 843	1 651 162	1 728 462	..
Accommodation services for visitors	..	1 495	1 416	1 560	1 621	..
Hotels and similar establishments ¹	33 645	..	..	..	..	..
Food and beverage serving industry	131 845	1 020 163	968 109	1 079 064	1 136 031	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	552	55 662	51 805	57 381	58 382	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	28 002	366 138	385 296	411 706	423 307	..
Water passenger transport	580	6 433	6 606	8 373	8 867	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	11 971	89 723	97 611	93 078	100 254	..
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available

1. Data for hotels and similar establishments refer to number of establishments.

2. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933640120>Table 3. **Germany: Internal tourism consumption**

Million EUR

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
Total	..	..	..
Consumption products	224 649	39 555	287 207
Tourism characteristic products	..	..	..
Accommodation services for visitors	26 820	9 003	39 457
Food and beverage serving services	43 819	7 422	51 241
Passenger transport services	31 182	10 393	41 575
Air passenger transport services	13 168	8 702	21 870
Railways passenger transport services	4 081	348	4 429
Road passenger transport services	12 802	928	13 730
Water passenger transport services	1 131	415	1 546
Passenger transport supporting services	..	..	..
Transport equipment rental services	1 494	153	1 647
Travel agencies and other reservation services industry	12 408	..	12 408
Cultural services	..	..	..
Sports and recreation services	17 470	2 889	31 115
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	91 455	9 697	109 764
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933640139>



From:
OECD Tourism Trends and Policies 2018

Access the complete publication at:
<https://doi.org/10.1787/tour-2018-en>

Please cite this chapter as:

OECD (2018), "Germany", in *OECD Tourism Trends and Policies 2018*, OECD Publishing, Paris.

DOI: <https://doi.org/10.1787/tour-2018-18-en>

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