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## **Germany**

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# Germany

## Tourism in the economy

Tourism is one of Germany's most prosperous and lucrative economic sectors, generating close to EUR 100 billion in gross value added (4.4% of GDP). Visitor spending in Germany amounts to roughly EUR 280 billion. Some 2.9 million workers are directly employed in the industry.

2012 was a particularly successful year for the tourism industry. For the third consecutive year Germany reported record numbers of overnights of 407.3 million. International visitors showed particularly strong growth, rising 8.1% to 68.8 million. The largest numbers of foreign tourists (roughly 16% of all non-resident overnight) come from the Netherlands. Hamburg and Berlin were able to benefit most from this positive development, reporting the biggest increase in Germany in terms of overnight in 2012. This clearly underlines the positive trend in city-based tourism.

Germany is also enjoying unprecedented popularity as a destination for business travellers. In 2012, the number of European business trips to Germany rose by 12.3% to roughly 13 million. Germany is the world's top destination for international trade shows and boasts three of the five largest exhibition centres in the world.

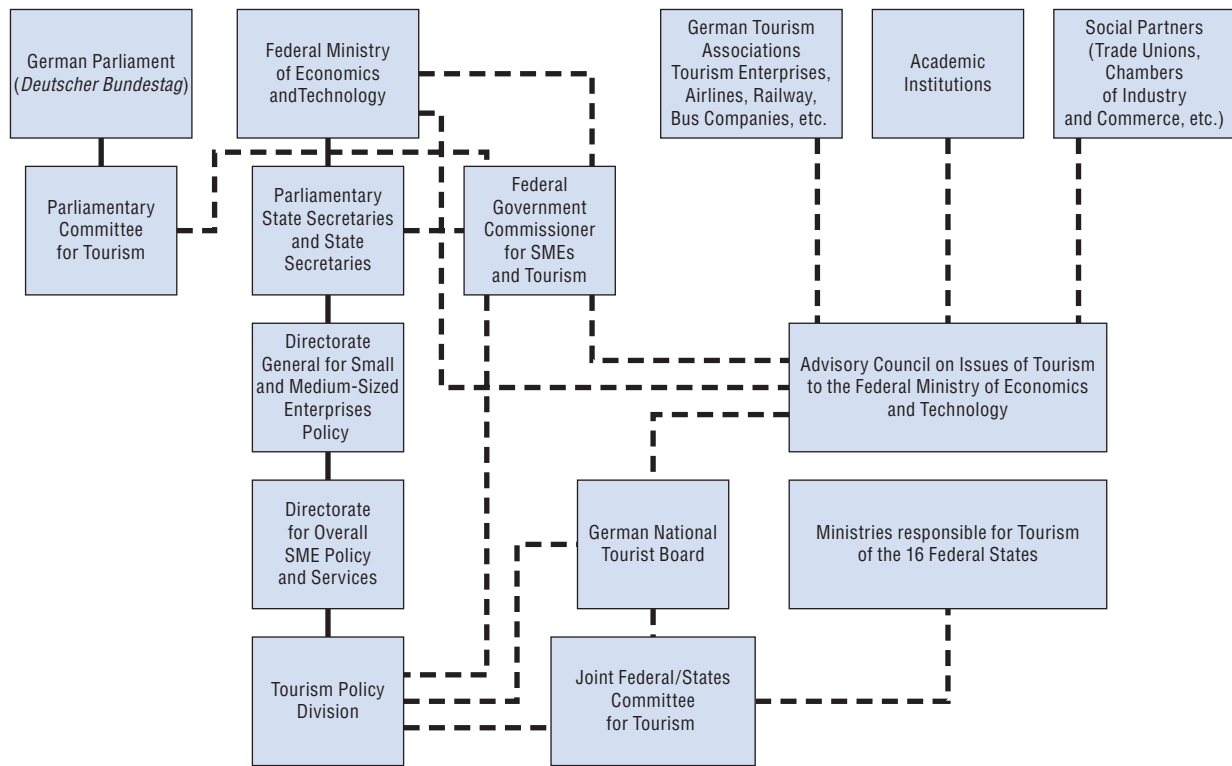
## Tourism organisation and governance

Germany's federal structure means that the federal government is primarily responsible for establishing an appropriate policy environment for tourism. The 16 *Länder* (states) are responsible for the development, shaping and promotion of tourism. The Federal *Länder* Committee on Tourism meets twice a year, fostering the exchange of information and the co-ordination of measures involving more than one Land.

Within the German government, the Federal Minister of Economics and Technology has the leading responsibility for tourism policy (Figure 1). The federal government's Commissioner for SMEs and Tourism is responsible for co-ordinating tourism policy within the federal government and with the German Parliament (Bundestag) and its Tourism Committee.

The Federal Minister of Economics and Technology is supported by the Advisory Council on Issues of Tourism, which brings together the interests of government, commerce, academia, local authorities and business associations.

The German National Tourist Board (GNTB) is responsible for marketing tourism abroad. It represents Germany throughout the world as a destination for holidays, business travel and visits to friends and family. The GNTB, with over 30 offices worldwide, works closely with the tourism marketing organisations of the 16 *Länder* and co-operates

Figure 1. **Germany: Organisational chart of tourism bodies**

Source: OECD, adapted from the Federal Ministry of Economics and Technology, 2014.

throughout the world with the German Chambers of Commerce Abroad, the Overseas Trade Exhibition Division of the Federal Ministry of Economics and Technology and AUMA, the Association of the German Trade Fair Industry.

### Tourism budget

The budgetary funds available to the Federal Ministry of Economics and Technology for tourism are concentrated on two main areas:

- Institutional support for the German National Tourist Board. In 2013, federal funding for the GNTB was increased by EUR 0.5 million to EUR 28.3 million. The additional funds will be used for marketing in Southeast Europe, an important emerging market for inbound tourism to Germany. Furthermore, on account of the flooding in summer 2013, which restricted travel to the affected areas, the Federal Ministry of Economics and Technology provided the GNTB with one-time special funding of EUR 250 000 for an advertising campaign abroad.
- Promotion of projects to enhance the performance of small and medium-sized enterprises in the tourism sector. In 2013 the budget for this was EUR 1.6 million, the same as in 2011 and 2012.

In addition, other federal ministries fund measures and projects in their respective policy fields and from their own budgets which are deemed to benefit tourism. Furthermore, enterprises in the tourism sector have access to funding from the federal government to support investment.

## Tourism-related policies and programmes

The central goal of the federal government's tourism policy is to boost the performance and competitiveness of the German tourism industry. The focus is on supporting small and medium-sized enterprises (SMEs) in the tourism industry so that they can develop their competitive positions and fully unlock their potential for growth and employment, as well as strengthen their sustainability and social responsibility. The German Bundestag has asked the federal government to report on the development of the tourism industry in Germany at regular intervals. The federal government delivers on this by generating reports on tourism policy.

Completed at the start of 2013, "Tourism prospects in rural areas" is one of the most important tourism policy projects launched by the federal government. Tourism is especially important for jobs and income in rural areas, which are often structurally weak. With a practical guide and ten complementary, detailed sub-reports, the project makes an important contribution to making rural areas more appealing for tourists. A nationwide road show will present the results of the projects at ten local events. In this connection, workshop sessions will be held with key players in the tourism industry, as well as public tourism professionals and representatives from the political and administrative arenas, to discuss and improve upon the project results.

The Federal Ministry of Economics and Technology supports the "Tourism for children and adolescents" project. The project's goals include more intensive international marketing of services and facilities for tourism for children and young people (particularly by the GNTB), enhanced networking and collaboration among providers of youth tourism services, and the development of a professional marketing system. To this end, six nationwide conferences will be held to share best practices and develop recommendations for action.

Demographic change is also altering the labour markets in the tourism industry. Against the backdrop of an impending shortage of skilled labour, the Federal Ministry of Economics and Technology is supporting a project to examine the specific need for skilled labour in the tourism industry. The aim is to identify the exact profile of requirements for workers and businesses alike, so that businesses can safeguard their competitive positions by recruiting suitable staff. To increase the appeal of the tourism industry as a place to work and in which to promote continuing education, a new occupation requiring formal training – "Tourism and travel management (agent for private and business travel)" – was introduced in 2011, and the continuing professional development programme to become a "certified senior tourism clerk" was modernised.

In connection with a project to develop and market accessible services, which has been sponsored by the Federal Ministry of Economics and Technology since 2011, a nationwide labelling system for accessible services has been developed for the first time. The system was presented at the "Tourism for All – Accessibility as a Sign of Quality" symposium in Berlin in 2013.

The nationwide competition for Sustainable Tourism Regions was held in 2012/13. Organised by the Federal Ministry for the Environment in tandem with the German Tourism Association, this competition received entries from 34 regions in 12 *Länder*, which were rated on 50 criteria (economy, ecology and social compatibility). This nationwide competition seeks to strengthen sustainable tourism in Germany and increase its visibility.

With a trilateral campaign launched in co-operation with Switzerland and Austria, the federal government is taking action against the sexual exploitation of children and adolescents in the tourism industry. Above all, the campaign seeks to inform tourists and raise their awareness of the issue, and promote responsible action on the part of workers in the travel sector.

## Statistical profile

Table 1. **Germany: Domestic tourism**

	Unit	2008	2009	2010	2011	2012
Total domestic trips		..	..	..	..	..
Overnight visitors (tourists)	Thousand	108 061	108 608	113 116	118 710	122 328
Same-day visitors (excursionists)		..	..	..	..	..
<i>Trips by main purpose of visit</i>						
Business and professional		..	..	..	..	..
Holiday, leisure and recreation		..	..	..	..	..
Nights in all means of accommodation	Thousand	313 005	313 870	319 970	329 498	338 432
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Domestic travel receipts		..	..	..	..	..

Source: Federal Statistical Office.


StatLink  <http://dx.doi.org/10.1787/888932986986>

Table 2. **Germany: Inbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international arrivals		..	..	..	..	..
Overnight visitors (tourists)	Thousand	24 886	24 223	26 875	28 351	30 410
Same-day visitors (excursionists)		..	..	..	..	..
<i>Top markets</i>						
Netherlands	Thousand	3 600	3 700	3 900	4 000	4 200
Switzerland	Thousand	1 800	1 900	2 000	2 300	2 500
United States	Thousand	2 000	1 900	2 200	2 200	2 300
United Kingdom	Thousand	2 000	1 900	2 000	2 100	2 200
Italy	Thousand	1 400	1 400	1 500	1 500	1 600
Nights in all means of accommodation		..	..	..	..	..
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Total international receipts	Billion EUR	36	34	37	38	40
International travel receipts	Billion EUR	27	25	26	28	30
International passenger transport receipts	Billion EUR	9	9	11	10	11

Source: Federal Statistical Office, Central Bank.


StatLink  <http://dx.doi.org/10.1787/888932987005>

Table 3. **Germany: Outbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international departures		..	..	..	..	..
Overnight visitors (tourists)	Million	86	86	86	..	..
Same-day visitors (excursionists)		..	..	..	..	..
Total international expenditure		..	..	..	..	..
International travel expenditure	Billion EUR	62	58	60	62	65
International passenger transport expenditure	Billion EUR	10	8	10	10	10

Source: Federal Statistical Office, Survey on Travel Behaviour of German Travellers 2010, Central Bank.

StatLink  <http://dx.doi.org/10.1787/888932987024>

**Table 4. Germany: Enterprises in tourism**  
Number of establishments


	2008	2009	2010	2011	2012
Total tourism enterprises	..	..	..	..	..
Tourism industries	..	..	..	..	..
Accommodation services for visitors	..	..	..	..	..
Hotels and similar establishments <sup>1</sup>	35 891	35 871	35 943	35 647	34 578
Food and beverage serving industry <sup>2</sup>	91 468	124 230	119 726	125 362	..
Passenger transport	..	..	..	..	..
Air passenger transport	..	..	..	..	..
Railways passenger transport	..	..	..	..	..
Road passenger transport	..	..	..	..	..
Water passenger transport	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..
Transport equipment rental	..	..	..	..	..
Travel agencies and other reservation services industry <sup>3</sup>	11 046	10 717	10 370	10 200	10 000
Cultural industry	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..
Other industries	..	..	..	..	..

1. Break in series. Until 2011, hotels and similar establishments with 9 or more bed places. Since 2012, hotels and similar establishments with 10 or more bed places.

2. Restaurants, cafes, ice cream parlours, snack bars.

3. Travel agencies.

Source: Federal Statistical Office, Annual Survey in the Hospitality Sector, German Travel Association, 2010.

StatLink  <http://dx.doi.org/10.1787/888932987043>

**Table 5. Germany: Employment in tourism**  
Thousand employees

	2008	2009	2010	2011	2012
Total tourism employment (direct) <sup>1</sup>	1 039	1 454	1 413	1 457	1 452
Tourism industries	..	..	..	..	..
Accommodation services for visitors	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Food and beverage serving industry	..	..	..	..	..
Passenger transport	..	..	..	..	..
Air passenger transport	..	..	..	..	..
Railways passenger transport	..	..	..	..	..
Road passenger transport	..	..	..	..	..
Water passenger transport	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..
Transport equipment rental	..	..	..	..	..
Travel agencies and other reservation services industry	..	..	..	..	..
Cultural industry	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..
Other industries	..	..	..	..	..
<b>Gender breakdown</b>					
Male (% of total tourism employment)	41	42	43	43	..
Female (% of total tourism employment)	59	58	57	57	..

1. Hotels and restaurants.

Source: Federal Statistical Office.



StatLink  <http://dx.doi.org/10.1787/888932987062>

Table 6. **Germany: Internal tourism consumption**  
Million EUR, 2010

	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	221 236	36 627	257 863
Consumption products	..	..	..
Tourism characteristic products	..	..	..
Accommodation services for visitors	17 135	9 519	26 654
Food and beverage serving services	44 047	5 629	49 676
Passenger transport services	29 327	11 475	40 802
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services	8 200	..	8 200
Cultural services	13 718	2 068	15 786
Sports and recreation services <sup>1</sup>	7 885	986	8 871
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	100 924	6 950	107 874
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

1. Includes recreation and other entertainment services.

Source: Tourism Satellite Account.

StatLink  <http://dx.doi.org/10.1787/888932987081>

## For more information

Federal Ministry of Economics and Technology  
Germany National Tourist Board  
German Travel Association  
Federal Statistical Office  
2013 Report on Tourism Policy

[www.bmwi.de](http://www.bmwi.de)  
[www.germany.travel](http://www.germany.travel)  
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