

# Germany

## Tourism in the economy

Tourism in Germany continues to grow. The Tourism Satellite Account shows the sector directly generated over EUR 105 billion in the German economy, or 3.9% of total GVA in 2015. Indirect effects are estimated to account for an additional EUR 76.1 billion. Over 2.9 million are directly employed in the sector, equivalent to 6.8% of total employment. Travel exports represented 12.5% of total service exports in 2018.

In 2018, 87.0 million international visitors stayed overnight in Germany, an increase of 4.5% from 2017. In total, 185.1 million tourist arrivals were recorded in 2018 (3.8% more than in 2017), of which 22% were international. The three main source markets for Germany in 2018 were the Netherlands (12% of international overnight stays), Switzerland (8.5%) and the United States (7.7%). In 2018, there were 419.6 million overnight stays recorded in accommodation facilities with ten beds or more, an increase of 4% on the previous year. International tourism receipts accounted for 3% of total exports in 2015. Visitor spending exceeded EUR 287 billion, with EUR 224.6 billion (78%) of tourism revenue attributed to domestic tourism, whereas visitors from abroad spent EUR 39.6 billion (14%).

Domestic tourism has by far the largest share of overnight stays (332.6 million or 82%), with a growth of 3.9% in comparison to 2017.

## Tourism governance and funding

The Federal Government is primarily responsible for establishing an appropriate policy environment for tourism. The Federal Minister for Economic Affairs and Energy has lead responsibility for tourism policy, and is supported by the Advisory Council on Tourism Issues which brings together the interests of government, tourism industry, academia and others. The Commissioner for Tourism is responsible for co-ordinating tourism policy within the Federal Government and with the German Parliament, in particular with the Parliamentary Tourism Committee.

The 16 Federal States (*Länder*) are responsible for developing, shaping and promoting tourism policy. The *Länder* ministries are charged with designing, implementing and funding policies to promote tourism development. Each Federal State has a destination management organisation that represents the interests of regional and local/municipal organisations. Local tourism offices co-ordinate the work of small, local enterprises, promote product design and undertake relevant marketing activities.

The Federal-*Länder* Committee on Tourism meets twice a year, fostering the exchange of information and the co-ordination of measures involving two or more *Länder*.

The German National Tourist Board is responsible for marketing Germany abroad, working closely with the tourism marketing organisations of the *Länder* and with the German Chambers of Commerce Abroad.

Support for tourism remains a focal point of the Federal Government's regional policy, including through the Joint Federal-*Länder* Scheme for the Improvement of Regional Economic Structures (GRW), which provides funding in the form of investments in trade and industry (including the tourism economy), and

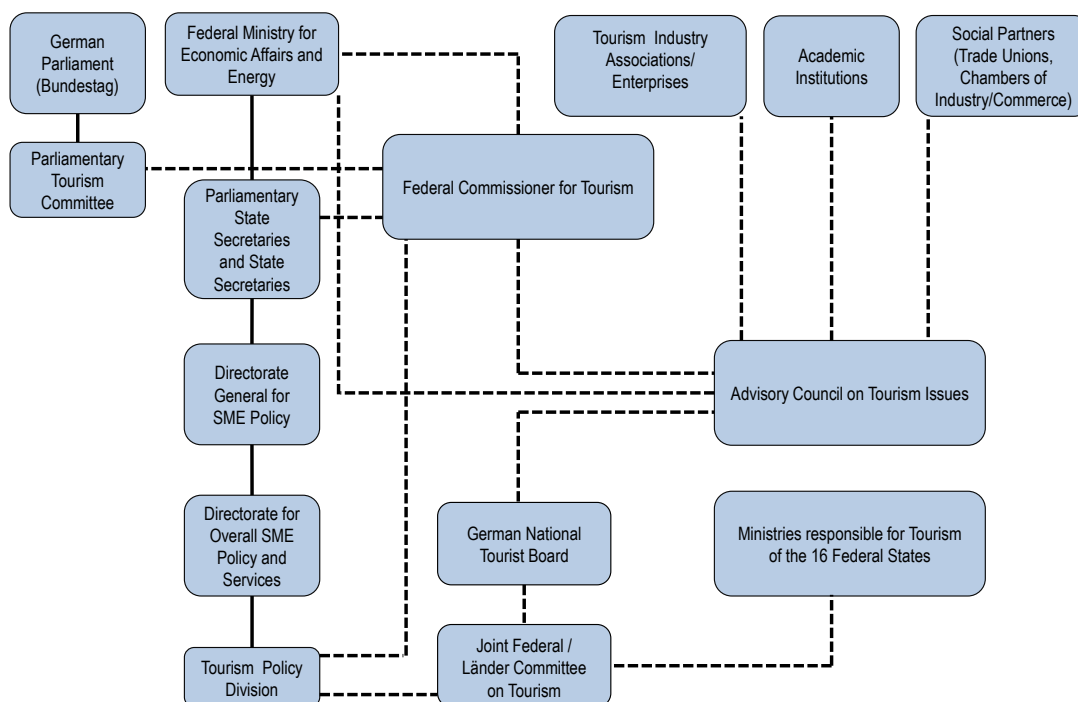
municipal investments in economic infrastructure (including basic infrastructure for tourism, developing land for tourism and public tourist facilities). The GRW budget for tourism was EUR 909 million over the period 2014-18, divided evenly between Federal and *Länder* contributions.

The Federal Ministry for Economic Affairs and Energy budget for tourism in 2018 included EUR 32.6 million for institutional support for the German National Tourist Board (up 7% on 2017), together with EUR 26.1 million for marketing activities (up 4.4%).

Tourism businesses also have access to funding from the Federal Government to support investment through, for example, the Joint Federal-*Länder* Scheme for the Improvement of Regional Economic Structures, and the European Recovery Programme. Tourism also benefits from funding measures and project supports offered by other federal ministries in their respective policy fields.

Financing for tourism in Germany at municipal, regional and *Länder* levels derives from a range of different sources. In addition to public funds, revenue is also generated from *Länder* based spa and tourism taxes as well as from regional bed taxes.

### Germany: Organisational Chart of tourism bodies



Source: OECD, adapted from the Federal Ministry for Economic Affairs and Energy, 2020

### Tourism policies and programmes

The main issues, challenges, and policy priorities for tourism development in Germany focus on supporting SMEs to develop their competitive position and unlock potential for growth and employment. Other tourism policy priorities include:

- Accessibility - making services and information available for people with reduced mobility and families with small children.
- Strengthening rural tourism - rural regions account for 60% of Germany's territory and 32% of holiday accommodation capacity, but only 12% of tourism value added.

- Labour and skills - competition for skilled professionals has intensified across the entire economy and is impacting the development of tourism. Many tourism firms are registering declining numbers of trainees, comparatively high training drop-out rates and high staff turnover.
- Digitalisation - an increasingly important issue, where smaller businesses in particular are struggling to keep up. The digital transformation of tourism, or Tourism 4.0, is included as a key priority for the Federal Government in its National Tourism strategy.
- Influx from new source markets - management of congestion caused by increase in visitors.
- Economic, social and environmental sustainability.

The 2019 National Tourism Strategy aims to strengthen tourism in the economy and to prepare the entire sector for the future. The Strategy has three overarching policy goals: to raise domestic value creation, to improve the quality of life for the people living in Germany, and to play a part in helping to ensure global stability. In order to achieve these goals, the Federal Government has worked closely with partners from business and government to develop a set of six strategic goals for tourism policy:

- Exploit the many different areas of economic potential in tourism, including creation of employment opportunities in rural areas.
- Strengthen the competitiveness of Germany as a tourism destination, and bolster the tourism industry which is largely made up of SMEs, providing it with the room it needs to develop.
- Create modern, accessible, reliable and sustainable digital infrastructure that takes account of tourists' needs, and of the challenges associated with an increase in visitor numbers.
- Seek to develop quality tourism that preserves valuable natural and cultural habitats, contributes to providing a high quality of life for visitors and local residents, and creates a positive image of Germany abroad.
- Utilise the potential of tourism to boost economic development in other parts of the world, and to foster peace, tolerance and international understanding,
- Support tourism development that is environmentally and climate friendly.

Through a dialogue process led by the Federal Ministry for Economic Affairs and Energy, the Federal Government collaborates with individual federal ministries to develop an Action Plan covering the priorities defined in the National Tourism Strategy and detailing specific measures for each of the fields of action. Other actors, such as *Länder* and business associations, also develop action plans setting out specific measures.

Ongoing actions in support of the Strategy include:

- Tourism for All project, providing information on barrier-free tourism offerings. Measures include the creation of a nationwide certification system and database, which is made available by the Germany National Tourist Board.
- Development of sustainability guidelines for tourism destinations, dissemination of information on sustainable tourism offerings through the German National Tourist Board, the Green Travel Transformation project to sensitise consumers and the travel trade on sustainability issues, and work on measuring sustainability of tourism.

The Federal Ministry for Economic Affairs and Energy has also established a Centre of Excellence for Tourism, which mainly supports the implementation of tourism policy objectives by monitoring and analysing economic, technical and social developments in the sector. An important part of the Centre's work is the Tourism 2030 project, which brings together various industry players and academics to look at long-term scenarios and prospects for tourism in Germany. The Centre of Excellence has an Advisory Board and a Supervisory Body whose membership includes representatives of national tourism associations (Box 1.5).

The National Tourism Strategy also considers the impact of German outbound tourism on developing nations. The Federal Ministry of Economic Co-operation and Development supports over 90 tourism projects in developing countries that contribute to achieving the Sustainable Development Goals and Agenda 2030.

## Statistical Profile

### Germany: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism</b>					
Total domestic trips	..	..	..	..	726 728
Overnight visitors (tourists)	153 902	164 139	164 682	151 175	159 338
Same-day visitors (excursionists)	..	..	..	..	567 391
Nights in all types of accommodation	570 010	611 975	589 172	551 346	587 419
Hotels and similar establishments	214 421	221 242	217 997	220 102	235 441
Other collective establishments	131 224	139 304	129 471	107 981	136 487
Private accommodation	224 365	251 430	241 704	223 263	215 491
<b>Inbound tourism</b>					
Total international arrivals	..	..	..	..	..
Overnight visitors (tourists)	32 860	34 831	35 405	37 307	38 748
Same-day visitors (excursionists)	..	..	..	..	..
<b>Top markets</b>					
Netherlands	4 228	4 315	4 466	4 574	4 703
Switzerland	2 758	3 008	3 096	3 167	3 295
United States	2 365	2 528	2 553	2 803	2 964
United Kingdom	2 410	2 554	2 545	2 596	2 674
Italy	1 637	1 708	1 645	1 702	1 781
Nights in all types of accommodation	74 805	78 828	79 947	83 111	86 962
Hotels and similar establishments	61 312	64 890	65 861	68 653	71 418
Other collective establishments	13 493	13 938	14 086	14 458	15 543
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	183 238	181 216	192 957	194 276	208 172
Overnight visitors (tourists)	83 008	83 737	90 966	92 402	108 542
Same-day visitors (excursionists)	100 230	97 479	101 991	101 874	99 630
<b>Top destinations</b>					
Austria	10 575	10 544	11 380	11 275	14 396
Italy	9 485	10 646	11 548	10 973	13 573
Spain	9 143	10 242	10 393	11 093	11 672
Netherlands	..	4 839	6 763	5 673	7 413
France	5 472	4 838	5 159	6 231	6 143
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	43 779	45 682	47 154	49 753	50 642
International travel receipts	32 609	33 265	33 838	35 282	36 391
International passenger transport receipts	11 170	12 417	13 316	14 471	14 251
<b>Outbound tourism</b>					
Total international expenditure	76 381	76 953	78 853	85 943	88 141
International travel expenditure	70 261	69 861	72 084	78 839	80 934
International passenger transport expenditure	6 120	7 092	6 769	7 104	7 207

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076818>

## Germany: Enterprises and employment in tourism

	Number of establishments <sup>2</sup>	Number of persons employed				
	2017	2014	2015	2016	2017	2018
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>249 009</b>	<b>1 651 162</b>	<b>1 728 462</b>	<b>1 840 602</b>	<b>2 122 014</b>	..
Accommodation services for visitors	..	1 560	1 621	1 720	1 760	..
Hotels and similar establishments <sup>1</sup>	32 031	..	..	..	..	..
Food and beverage serving industry	171 613	1 079 064	1 136 031	1 216 356	1 482 155	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	500	57 381	58 382	59 449	55 786	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	31 500	411 706	423 307	448 828	465 354	..
Water passenger transport	552	8 373	8 867	9 253	9 732	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	12 813	93 078	100 254	104 996	107 227	..
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. 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/10.1787/888934076837>

## Germany: Internal tourism consumption

Million EUR

	2015		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>224 649</b>	<b>39 555</b>	<b>287 207</b>
Tourism characteristic products	133 193	29 860	177 443
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	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934076856>



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