



**Tourism Market Insights  
Germany: 2021**

**WESGRO**  
cape town & western cape  
research

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# 1. Overview of Germany

Where is Germany?	Germany occupies a central position in Western Europe bordering no less than six other Western European countries.
Population	83.9 million (2021 est.)
Language	German
Economy	<ul style="list-style-type: none"><li>• In 2020, the economy experienced a recession due to the COVID-19 pandemic.</li><li>• The German economy experienced its sharpest decline in the first half of 2020.</li><li>• The hospitality, leisure and manufacturing sectors have each been affected.</li><li>• As the pandemic reaches containment, growth in real GDP is expected to reach 4.0% in 2021, and will gradually drop to around 1.0% per year across the period 2025-2027.</li><li>• Demand for hospitality and leisure services has been particularly constrained by COVID-19 related regulations and health concerns.</li><li>• The value of inbound tourist and business receipts increased by 0.7% in 2019 however, in 2020, the overall performance is expected to drop by 47.9%.</li></ul>
Climate	Temperate and marine; cool, cloudy, wet winters and summers; occasional warm mountain wind.
Religion	Roman Catholic 27.7%, Protestant 25.5%, Muslim 5.1%, Orthodox 1.9%, other Christian 1.1%, other .9%, none 37.8% (2018 est.)
Age Structure (2020 estimate)	<ul style="list-style-type: none"><li>• 0-14 years: 12.89% (male 5,302,850/female 5,025,863)</li><li>• 15-24 years: 9.81% (male 4,012,412/female 3,854,471)</li><li>• 25-54 years: 38.58% (male 15,553,328/female 15,370,417)</li><li>• 55-64 years: 15.74% (male 6,297,886/female 6,316,024)</li><li>• 65 years and over: 22.99% (male 8,148,873/female 10,277,538)</li></ul>

## 2. Overview of the German Travel Market

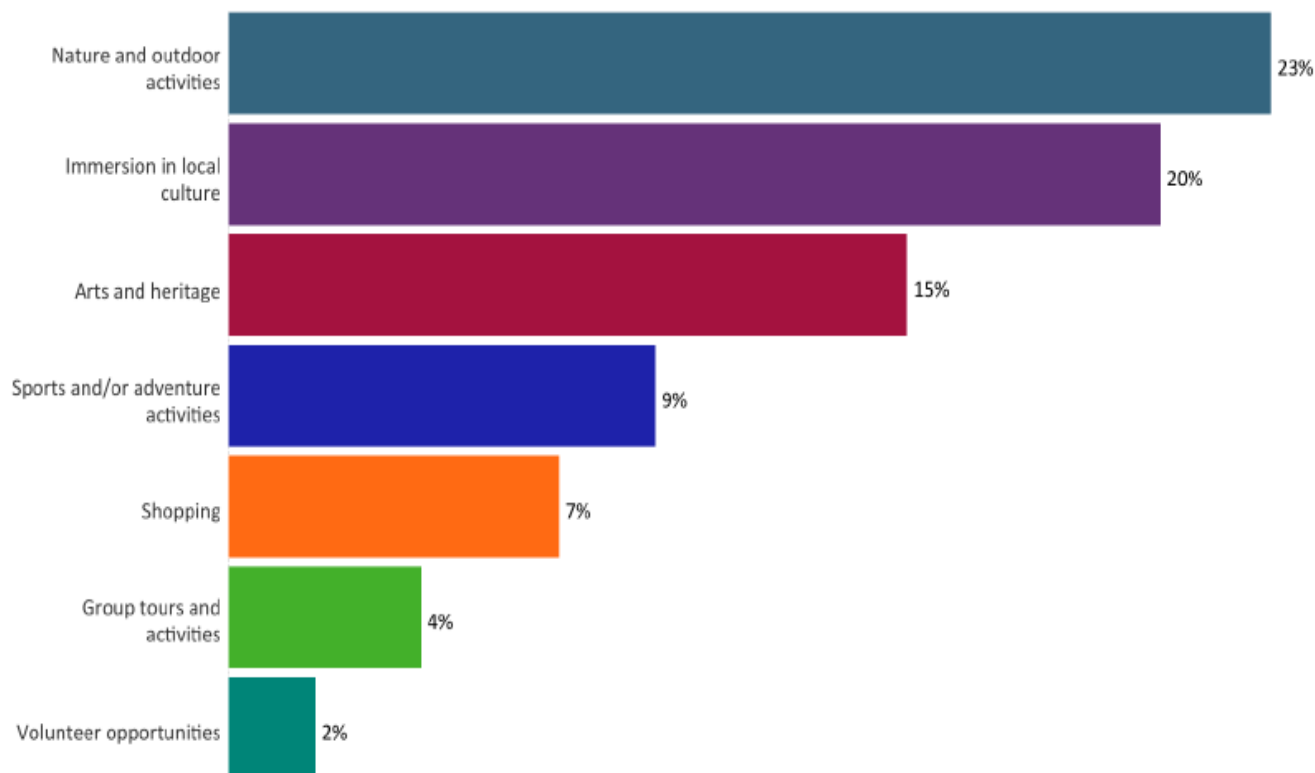
Largest Cities Number of people	<ol style="list-style-type: none"> <li>1. Berlin: 3,426,354</li> <li>2. Hamburg: 1,739,117</li> <li>3. Munich: 1,260,391</li> <li>4. Koeln: 963,395</li> <li>5. Frankfurt: 650,000</li> </ol>
Disposable income Per capita, US\$ 2020	28,050
Savings As % of disposable income: 2020	21.6%
Median Age: 2020	45.9 years
Paid Holidays (2020) Public Holidays (2020) Annual Leave (2020)	24.0 days 10.0 days 34.0 days
Outbound Departures ('000 trips)	<ol style="list-style-type: none"> <li>1. 2016: 99,519.3</li> <li>2. 2017: 106,293.0</li> <li>3. 2018: 112,290.8</li> <li>4. 2019: 115,628.8</li> <li>5. 2020: 52,727.7</li> </ol>
Outbound trips by mode of transport ('000 trips, 2020)	<ol style="list-style-type: none"> <li>1. Air: 38,928.9</li> <li>2. Land: 12,000.8</li> <li>3. Rail: 1,776.9</li> <li>4. Water: 21.1</li> </ol>
Type of Outbound Trips (2020)	Leisure: 84.6% Business: 15.4%

	000 trips	2015	2016	2017	2018	2019	2020
Top 10 Outbound Departures by destination	Austria	12,140.7	12,986.1	13,442.9	14,092.2	14,383.5	7,661.9
	Italy	10,016.0	11,160.7	12,450.7	13,333.1	13,714.1	5,313.4
	France	11,519.1	11,774.9	12,278.4	12,272.2	12,436.5	5,105.8
	Spain	10,260.3	11,208.7	11,897.4	11,414.5	11,197.4	4,327.9
	Netherlands	4,283.0	4,583.5	5,207.0	5,688.4	6,175.0	3,030.4
	Turkey	5,356.2	3,827.0	3,517.6	4,464.3	5,027.5	2,433.9
	Greece	2,810.4	3,138.7	3,706.0	4,381.4	4,026.3	1,900.0
	Poland	4,388.0	4,607.5	4,634.1	5,125.4	5,506.8	1,850.2
	Denmark	2,820.9	3,047.7	3,312.6	3,468.5	3,479.0	1,363.5
	Portugal	1,528.7	1,722.5	1,982.1	2,073.6	2,241.1	1,293.9

Source: Euromonitor International, 2021

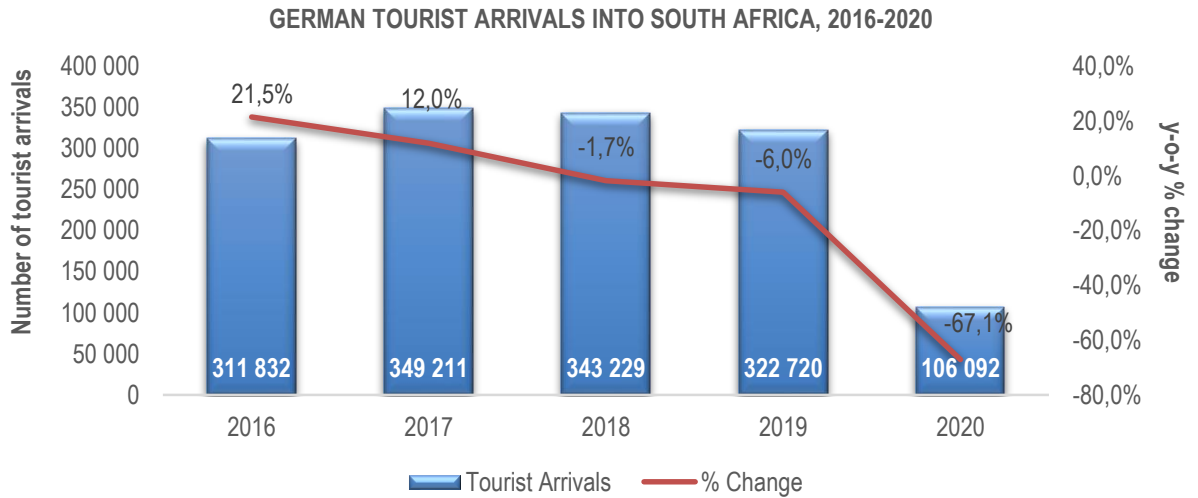
### 3. German Outbound Travel Trends

- Border closures, flight restrictions and firm COVID-19 regulations in 2020 had a severe impact on tourism flows, with only domestic tourism experiencing a partial recovery into the second half of the year.
- Inbound arrivals recorded a decline of 48% and reached 20.7 million in 2020, whereas outbound departures decreased by 54% translating into 52.7 million trips.
- Majority of the regulations in Germany affecting tourism flows were lifted into the second half of 2020, permitting cross-border travel, primarily within Europe.
- The number of outbound leisure trips were forecasted to reach 52.7 million in 2020 and 123.9 million by 2025. 84.6% of outbound trips taken in 2020 was for leisure and 15.4% for business. 38.9 million of these trips were taken by air and 12.0 million by land.
- Austria ranked as the top outbound destination between 2015 and 2020 and reached 7.7 million trips in 2020. Italy and France followed as the second and third most popular destinations among the Germans.
- The value of outbound expenditure reached EUR41.1 million in 2020; of which EUR37.9 million was spent on leisure, EUR12.4 million on lodging and EUR7.6 million on food. Leisure and lodging is forecasted to be the best-performing spending category through to 2025.
- According to the Euromonitor International 2020 Lifestyle Survey, 23% of Germans chooses nature and outdoor based vacations, 20% revealed a strong interest in local culture and 15% enjoys arts and heritage while on holiday.



Source: Euromonitor International Lifestyles Survey 2020

## 4. The German Traveller to South Africa



Top Purpose of visit to South Africa (2020)	Holiday (64.1%) VFR (13.2%) Business Traveller (8.3%)
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Average length of stay in South Africa (Number of nights)	2018: 18.9 2019: 19.0 2020: 20.7
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Top Age Categories (2020)	25-34 years: 31.8% 45-54 years: 18.4% 18-24 years: 14.8% 35-44 years: 14.8%
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Repeater Rate of German Travellers (2020)	First timers: 62.0% 2-3 times: 18.7% 4-5 times: 10.0%
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Accommodation Usage (2020)	Hotels: 1,334,695 Friends & family: 876,214 Guesthouse: 664,439 Self-catering: 515,860
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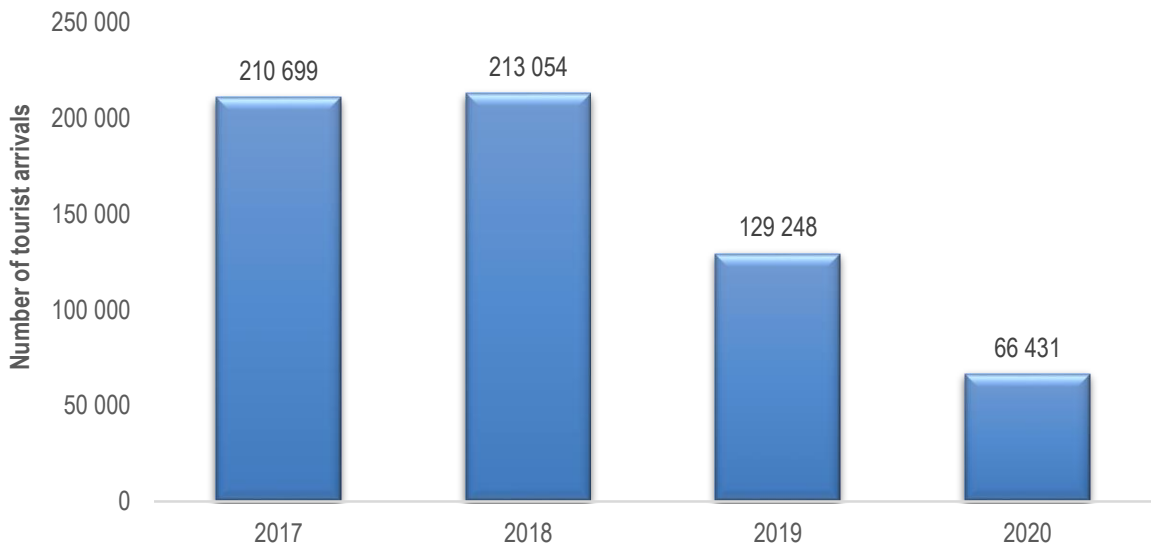
Total Foreign Direct Spend in South Africa (R in billions)	2018: R5.9 2019: R6.6 2020: R1.9
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Average Spend in South Africa	2018: R19,700 2019: R22,900 2020: R21,100
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Top 5 Activities undertaken in South Africa	Adventure Wildlife Visiting Natural Attractions Beaches Theme Parks
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## 5. The German traveller to the Western Cape

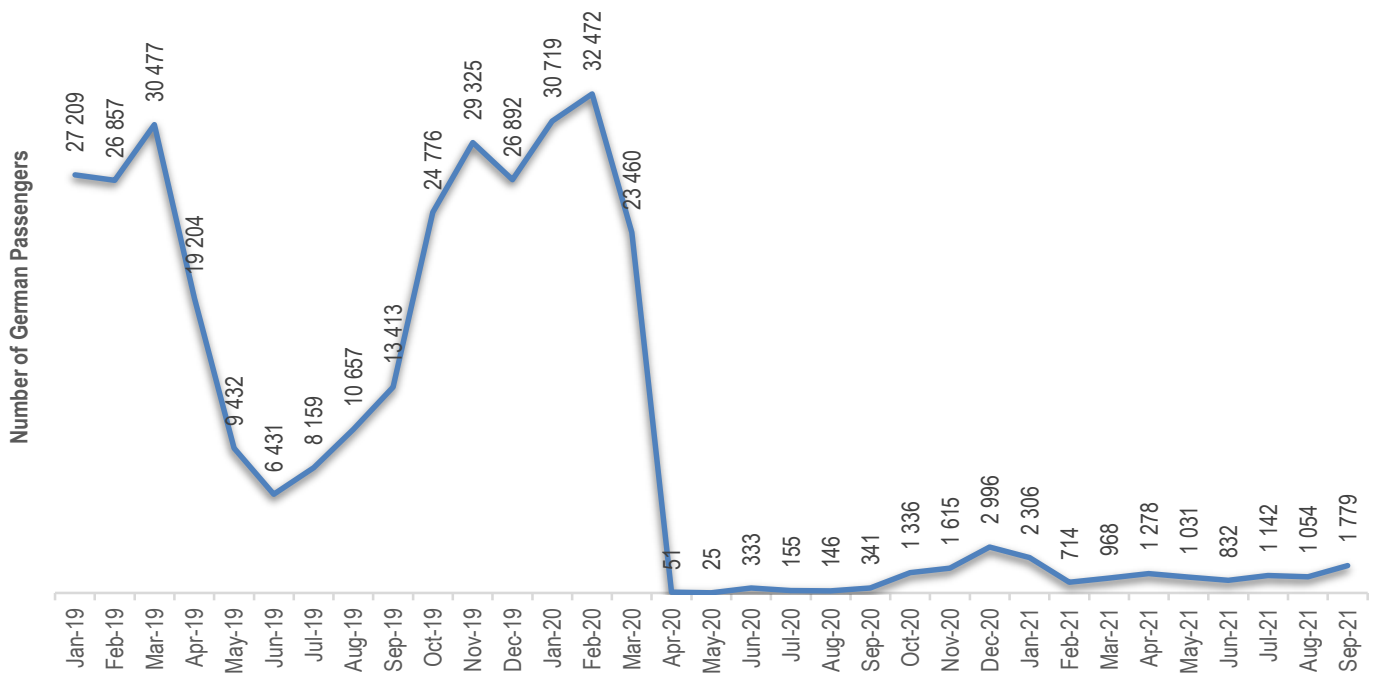
GERMAN TOURIST ARRIVALS TO THE WESTERN CAPE, 2017-2020



Source: SA Tourism, 2021

### 5.1 German passengers through the Cape Town International Airport

During the challenging nationwide lockdown which commenced on the 27<sup>th</sup> March 2020, the tourism and hospitality sectors have been the hardest hit globally. German passenger movement through the Cape Town International Airport plummeted in April 2020, recording only 51 passengers. Across the remaining months of 2020, December recorded the largest (2,669) number of passengers since lockdown. January 2021 remained steady at slightly over 2,000 passengers, followed by a peak of 1,779 only in September 2021.



Source: OAG Traffic Analyser, 2021

## 6. Key Findings

- Border closures, flight restrictions and firm COVID-19 regulations in 2020 had a severe impact on tourism flows, with only domestic tourism experiencing a partial recovery into the second half of the year.
- Majority of the regulations in Germany affecting tourism flows were lifted into the second half of 2020, permitting cross-border travel, primarily within Europe.
- The number of outbound leisure trips were forecasted to reach 52.7 million in 2020 and 123.9 million by 2025. 84.6% of outbound trips taken in 2020 was for leisure and 15.4% for business. 38.9 million of these trips were taken by air and 12.0 million by land.
- Austria ranked as the top outbound destination between 2015 and 2020 and reached 7.7 million trips in 2020. Italy and France followed as the second and third most popular destinations among the Germans.
- The value of outbound expenditure reached EUR41.1 million in 2020; of which EUR37.9 million was spent on leisure, EUR12.4 million on lodging and EUR7.6 million on food. Leisure and lodging is forecasted to be the best-performing spending category through to 2025.
- According to the Euromonitor International 2020 Lifestyle Survey, 23% of Germans chooses nature and outdoor based vacations, 20% revealed a strong interest in local culture and 15% enjoys arts and heritage while on holiday.
- German tourists travelling to South Africa are predominantly visiting for the purpose of holiday (64.1%), around 13.2% travelled to visit family and friends and 8.3% were business travellers. In 2020, the Germans enjoyed an average of 20.7 nights in South Africa.
- The Germans are mainly between the ages of 25 – 34 years, this category accounted for the largest (31.8%) share, followed by 18.4% in the 45-54 age bracket. 62% of Germans were first time visitors to the country in 2020 and 38% were repeat visitors.
- The Western Cape consecutively held the largest share of South Africa's German travellers between 2017 and 2020 and welcomed around 62.6% of the total German market to South Africa in 2020.
- Following the commencement of the nationwide lockdown period in March 2020, German passenger movement through the Cape Town International Airport started plummeting in April 2020, recording only 51 passengers. Across the remaining months of 2020, December recorded the largest (2,669) number of passengers since lockdown. January 2021 remained steady at slightly over 2,000 passengers, followed by a peak of 1,779 in September 2021.



## 7. List of Sources

1. South African Tourism
2. Euromonitor International
3. OAG Airline Passenger Traffic Analyser
4. Central Intelligence Agency
5. <https://worldpopulationreview.com/countries/cities/germany>

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