



# The economic factor of coach tourism in Germany 2017

Nina Jaschke  
Tourism and Statistics

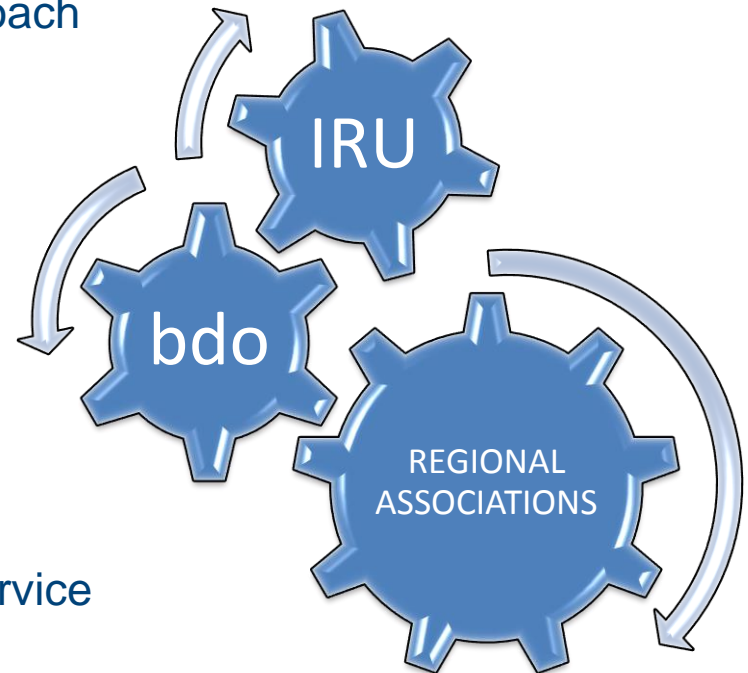
**German Bus and Coach Operators' Association**

Nina.jaschke@bdo.org  
www.bdo.org

# WHO ARE WE?



- we are the German Bus and Coach Operators' Association (bdo)
- we represent the interests of German private coach and bus operators
  - at national
  - and international level
- mostly small and medium-sized companies - organized into regional associations
- all three sectors:
  - occasional coach trips
  - scheduled long-distance coach service
  - scheduled local bus services
- all regional associations are members of the German Bus and Coach Operators' Association (bdo)



# Introduction/Background



- coach companies and their employees generate millions of euros
  - target regions also benefit
- > but hitherto unknown statistics had been missing
- > unfair treatment of coach sector  
emission zones, motorway tolls, congestion charges,...



# Introduction/Background



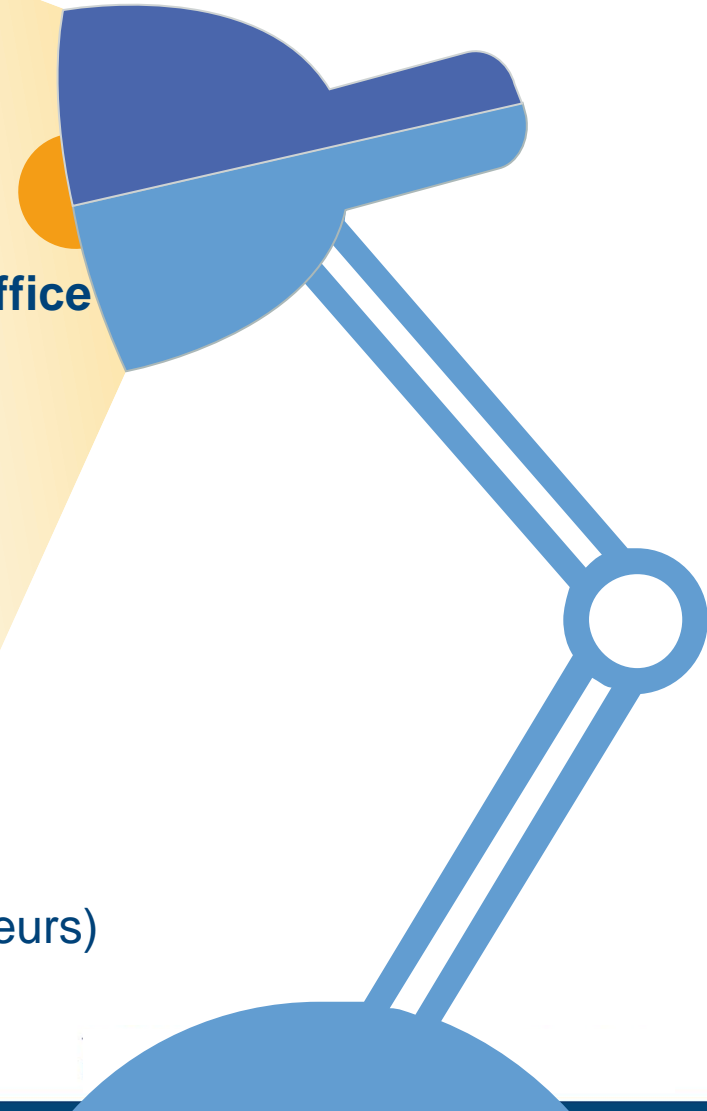
- bdo decided **in 2008** to commission a research institute to ascertain figures for the coach industry for the first time - *German Economic Institute for Tourism at the University of Munich (dwif)*
- finished study **in 2011**: extensive study with many impressive results – used extensively for supporting coach tourism
- **in 2013** the bus market changed in Germany because of deregulation:
  - Scheduled long-distance coach services became more and more important
  - image changed - especially for younger people
- **2017**: finished revised study – numbers for economic performance of all three sectors - with focus only on touristic use:
  - **occasional coach trips**
  - **scheduled long-distance coach services**
  - **scheduled local bus services**



# Methodology - Sources

## Overview about the different sources:

- **official statistics – German federal statistic office**
  - > regularly and extensive Data about bus and coach operators
  - > most recent data from 2015
- **secondary studies**
- **expert discussions**
- **Data from first study - extensive survey**  
(over 3,000 interviewed travellers and entrepreneurs)





## occasional coach trips



A photograph of a hotel room. In the center is a large bed with a wooden headboard and a grey upholstered panel. Two white pillows are on the bed. A grey blanket is at the bottom. On the left wall is a modern light fixture. On the right, a telephone is on a nightstand.

occasional coach trips  
**overnight trips**



**16.3 million overnight  
trips with 34 million  
overnight stays in  
Germany**

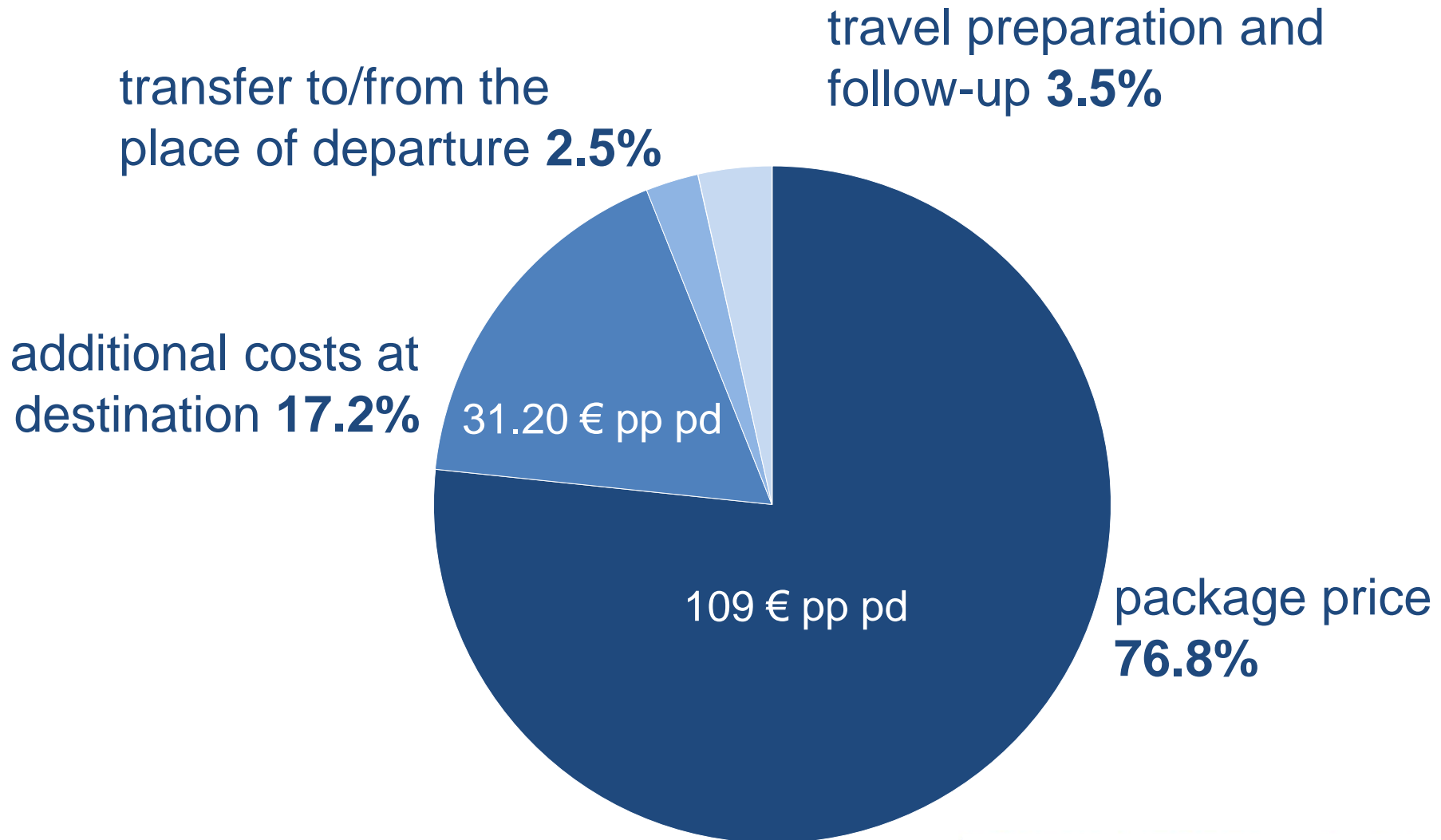


A large, thick blue bracket that spans the width of the central text, with its top and bottom edges curved inwards.

**grand total for overnight  
trips**

**6,856 million €  
gross revenue**

# proportional distribution of gross revenue



# proportional distribution of gross revenue



**approx. 25% in  
source and  
target regions**

travel preparation and  
follow-up 3.5%

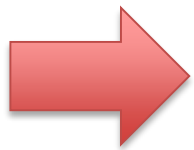
the  
re 2.5%

additional costs at  
destination 17.2%

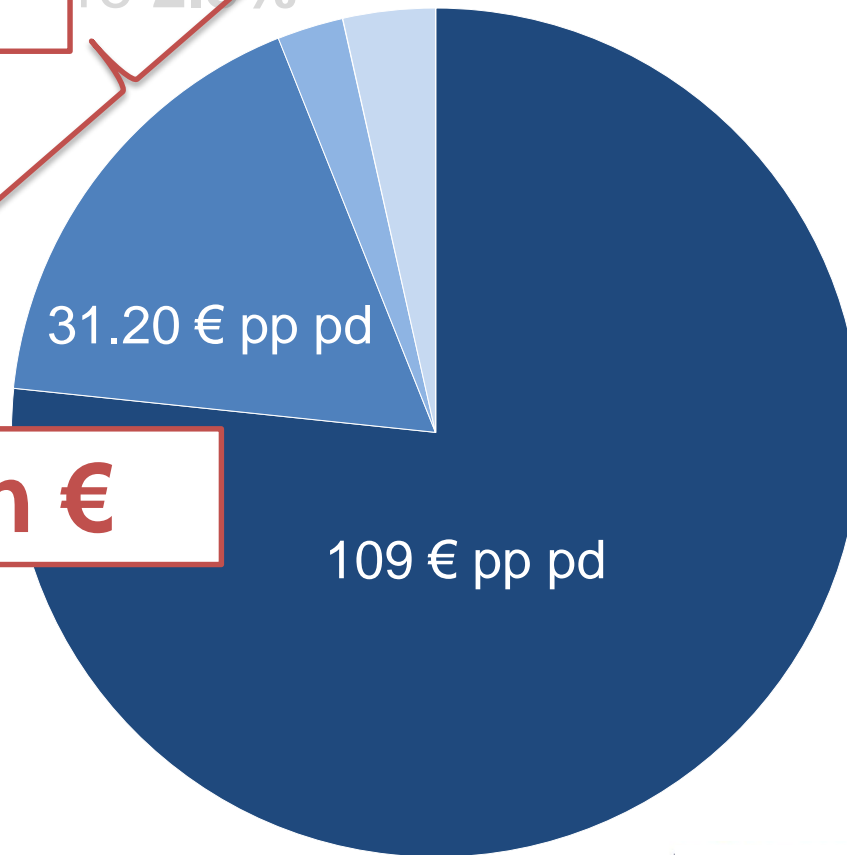
31.20 € pp pd

109 € pp pd

package price  
76.8%




**1 billion €**



A man and a woman are looking at a map outdoors. The man, on the left, has grey hair and is wearing a dark blue polo shirt. The woman, on the right, has blonde hair and is wearing a white shirt with black polka dots. They are both smiling and looking down at the map. The background is a blurred street scene with trees and a building.

occasional coach trips  
**day trips**



**65 million  
day trips by coach**

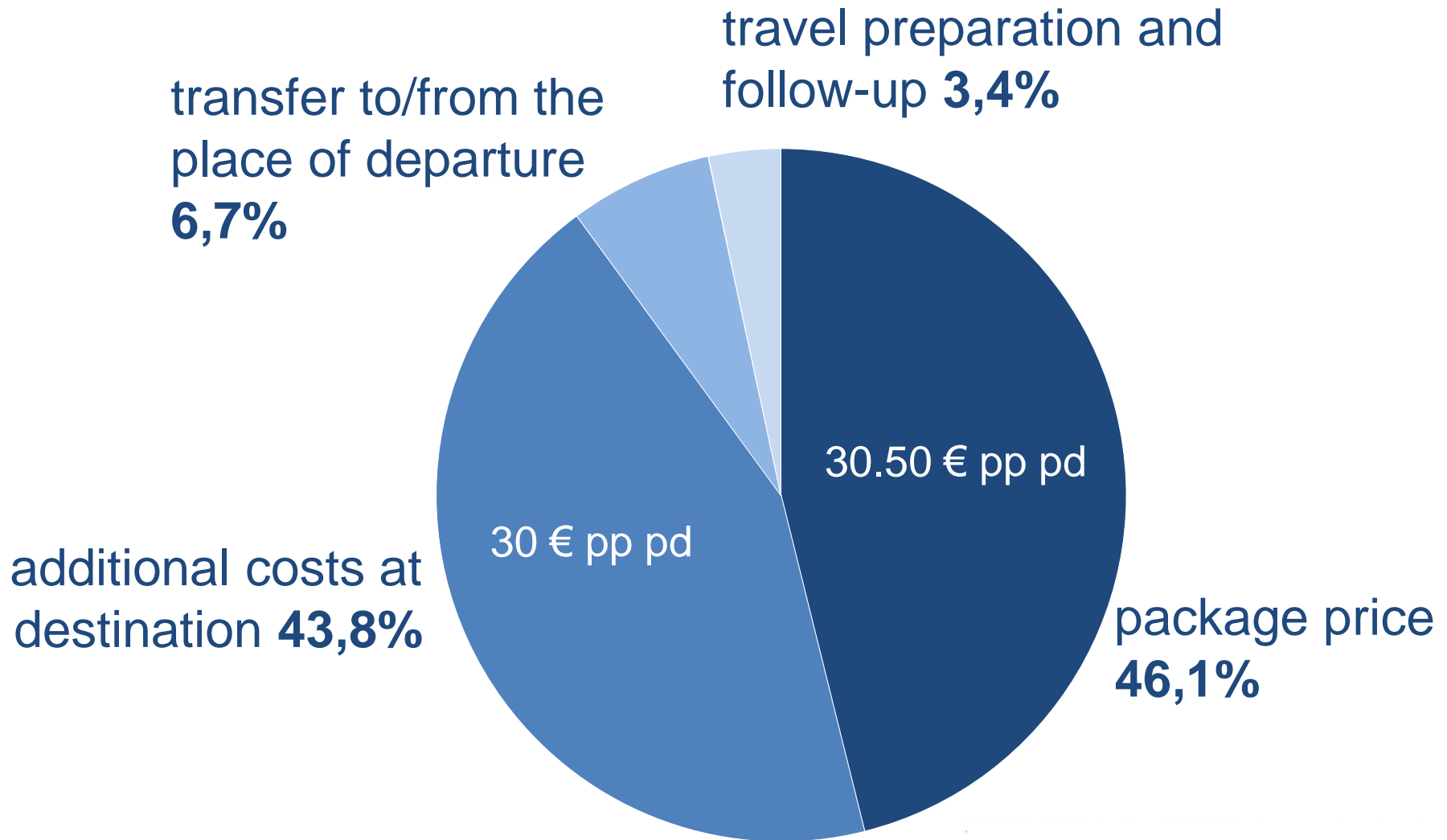


**grand total for day trips**

**4,167 million €**

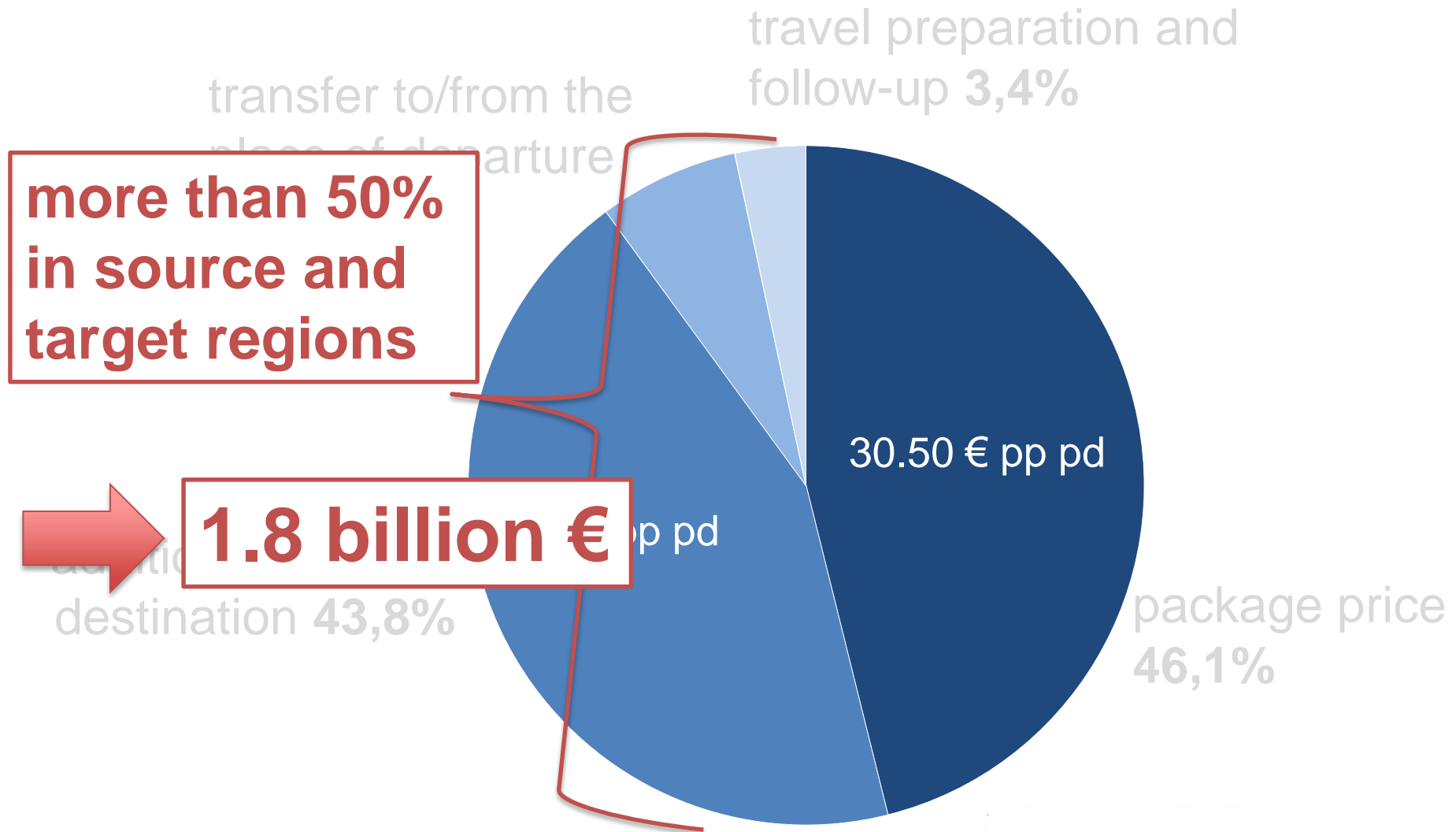
**gross revenue**

# proportional distribution of gross revenue





# proportional distribution of gross revenue



**grand total for  
overnight trips  
and  
day trips**

**11 billion €  
gross revenue**



## **scheduled local bus services**

# scheduled local bus services



## touristic demand in Germany



**2,948** million day trips



**522** million overnight stays



ticket price ~ just for scheduled local bus services within destinations



**801 million € gross revenue (ticket price)**

# scheduled local bus services



use for outward and return journey



**146** million € for transfer between source and target region



**1,248** million € additional daily spending in destinations (28.30 € pp)



**1,394** million € gross revenue

**grand total for using  
scheduled local bus  
services  
for tourism purposes**

**2.2 billion €  
gross revenue**



# **scheduled long-distance coach services**



# scheduled long-distance coach services



transfer between source and target region



**23.2** million passengers



**80%** used them for tourism purposes



∅ **17.33 €** ticket price per person

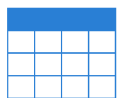


**322 million € gross revenue**

# scheduled long-distance coach services



additional expenses at destinations



**14** million tourist days



∅ **52.50** € additional expenses at destinations per person



**735** million € gross revenue

**grand total for using  
scheduled long-  
distance coach services  
for tourism purposes  
1 billion €  
gross revenue**

**Total in Germany: 14.3 billion**

**€384.3 million**

Spending on travel preparation and follow-up for occasional coach trips

**€452.3 million**

Costs of transfer to/from the place of departure of the coach for occasional trips

**€322.0 million**

Use of scheduled long-distance coach services for tourism purposes (fares)

**€735.0 million**

Additional spending in destination area during trips made with/by scheduled long-distance coach services

**€947.0 million**

Use of scheduled local bus services for tourism purposes (fares)

**€1,248.0 million**

Additional spending in destination area during trips made with/by scheduled local bus services

**€7,185.5 million**

Package price paid by coach tourists for occasional trips

**€3,001.2 million**

Additional spending in destination area during occasional trips

**77 % occasional coach services**

**7 % scheduled long-distance coach services**

**16 % scheduled local bus services**



Source: dwif 2017



# Turnovers and Income effects of coach tourism

# Turnovers and income effects through coach tourism in Germany



gross revenue  
**14,275.3** million €

VAT  
1,702.3 million €

net revenue  
12,573.0 million €

concessions  
8,402.6 million €

direct income  
4,170.4 million €

indirect income  
2,384.0 million €

total income  
**6,554.4** million €

# Turnovers and income effects through coach tourism in Germany



gross revenue  
**14,275.3** million €

VAT  
1,702.3 million €

net revenue  
12,573.0 million €

concessions  
8,402.6 million €

direct income  
4,170.4 million €

indirect income  
2,384.0 million €

**Bus/coach  
operators**

**all other  
service  
providers**

total income  
**6,554.4** million €





# **Employment equivalent and multiplier effects**

# Employment equivalent



total income  
**6,554.4** million €



national annual income per  
German inhabitant  
**27,540** €




employment equivalent  
**238,000 workplaces**

**each** workplace in  
German coach companies  
leads to **5** further  
employment contracts in the  
branch of suppliers and  
service providers.

# Key data on coach tourism in Germany



gross revenue approx. **14.3 billion €**



employment equivalent of about **238,000** earners of an average national income per person through coach tourism in Germany



Coach tourism = multiplayer effect **6.0**



development between **2009** and **2015**  
gross revenue : **+17,1%**

# What have we done with these results so far?



- have sent the study to all important politicians on national and regional level  
-> show how important the coach industry is
- sensitized our regional bus and coach associations  
-> argumentation base to demonstrate why busses and coaches should be widely supported
- **Traveling by bus or coach must be understood as a solution and not as problem from economic and of course environmental perspective!**

# What have we done with these results so far?



- have sent the study to all important politicians on national and regional level  
-> show how important the coach industry is
- sensitized our regional bus and coach associations  
-> argumentation base to demonstrate why busses and coaches should be widely supported
- **Traveling by bus or coach must be understood as a solution and not as problem from economic and of course environmental perspective!**
- **These results can only show the economic contribution of coach tourism in Germany**
- **Now it would be interesting and important to generate figures for all European countries to change the image and support bus and coach tourism in the whole of Europe**

**Thank you  
for your  
kind attention!**

**The economic factor of coach tourism in  
Germany 2017**

Nina Jaschke  
Tourism and Statistics

**German Bus and Coach Operators' Association**

Nina.jaschke@bdo.org  
www.bdo.org