



# Community-Based Tourism (CBT) in Germany

Germany ranked first in the EU in terms of the number of outbound trips to developing countries (DCs) in 2008. Community-Based Tourism (CBT) in Germany continues to be a niche market. Market growth is currently driven by German tourists' increasing interest in more authentic ways of experiencing the local culture and ways of living. This CBI fact sheet aims to point CBT providers from DCs towards specific opportunities in Germany. For more general information about buyer requirements, trends and segments, trade structure and pricing, please refer to the long haul tourism market and the German tourism market in general.

## Subsector market characteristics

- German travellers regard interaction with local people as enriching their travel experience. In 2009, 22% of the German population aged 14 and over (accounting for 14 million people) stated they would like to meet local people on their holidays in developing and newly industrialised countries. They see intercultural activities, especially those that allow interaction with the locals, as a way to gain authentic insight into local culture and the way people live there.
- German travellers who are most interested in engaging with local people are found to be tourists who have been on a study (43%) or activity (such as sports or other active activities, 34%) trip. These groups represent potential target groups for CBT.
- Almost one in every three German travellers is willing to pay more for holidays that support the local community, according to the German Tourist Industry Association.
- German CBT tourists consider CBT to be a real life experience, with the authentic touch of local customs, habits, arts and history. Highly qualified guide-lecturers as part of the tour are preferred, and a community comprising different generations (old and young) is considered interesting.
- Only a small number of German tour operators are exclusively specialised in CBT. As an alternative, CBT activities are offered as part of a more mainstream travel package, such as wildlife or cultural sightseeing.
- In the EU, Germany is one of the leading promoters of eco- and sustainable tourism, with a high number of organisations aiming to develop German outbound tourism to become more responsible towards local destinations. This is expected to further drive the public interest in the welfare of local communities, as well as the growth of CBT.

### General market characteristics

- The German travel market has started to recover from the crisis. The number of German outbound trips rose by 1.0% to 50.7 million in 2010, after a decline of 4.0% in 2009, according to IPK International. German travel spending also rose by 5.0% to €132 billion, which is comparable to the pre-crisis level in 2008.
- The German tourism market is expected to record a good growth in 2011. 23% of Germans want to travel more in 2011 than in 2010, according to the Reise Analyse survey. In addition, due to the rise in household income, they also plan to spend about 3% more on outbound travel in 2011, which is expected to reach €61.3 billion.
- Popular outbound destinations in 2010 continued to be in Europe, led by Austria, Spain and Italy. Nevertheless, long-haul destinations also gained in popularity. In 2010, holidays booked via tour operators to almost all long-haul destinations recorded growth, especially North America, the Caribbean and Central and South America, according to the German Travel Association.

### Trade channels

The three most important trade channels for DC CBT providers are local inbound tour operators, and the online trade channel. Many German tour operators include CBT tour programmes as part of non-CBT itineraries and do not explicitly advertise themselves as CBT tour operators. This makes it difficult to identify a suitable trade partner. However, companies advocating such concepts as 'sustainable', 'pro-poor', 'fair' travel represent a potential partner. In addition, DC CBT providers are also advised to become members of German tourism industry associations, such as DRV (<http://www.driv.de>) and ASR (<http://www.asr-berlin.de>) in order to be in touch with German tour operators.

Tourism trade channels in the CBT sector include travel agencies and outbound tour operators in Germany, as well as inbound tour operators in a destination country. In addition, other types of support organisations are also involved and play a role in, for example, helping a local community to set up a CBT programme, providing financial support, or facilitating links between local communities and travellers and/or outbound tour operators. Examples of German developmental organisations, who have financed and set up CBT projects, are the German Society for International Co-operation or GIZ (<http://www.giz.de>), German Agro Action (<http://www.welthungerhilfe.de>) and Tribal Travel (<http://www.tribaltravel.org>).

In 2009, 47% of pre-booked outbound holidays were made via travel agencies and 8.0% via tour operators. The other 45% did not buy package holidays and booked accommodation and other holiday elements separately. The number of German travellers who book their holidays directly with travel companies in the destination country via the Internet is expected to grow rapidly. To address this important trade channel, DC tourism providers should have an attractive website. A German version of the website is likely to impress German travellers.

### Role of the Internet

The Internet plays an important role in the German tourism industry. In 2009, around 64% of the German population aged 14 and above had internet access; 74% thereof used the Internet to plan holidays; 37% used it to book a trip or part of it. According to the Centre for Regional and Tourism Research, Germany was the EU's second largest online travel market in 2008, representing 18% of the EU, behind the UK (30%).

Tourists increasingly rely on online content generated by other tourists on travel forums to obtain travel ideas and inspiration, for example: Fair Ways (<http://www.fairunterwegs.org>: related to CBT and sustainable travel), Stefan Loose (<http://www.stefan-loose.de/globetrotter-forum>) and Erfolgreich Reisen (<http://www.erfolgreich-reisen.de>).

### Interesting players

Interesting players for DC CBT providers on the German market are:

- AE Reiseteam - <http://www.ae-reiseteam.de> - offers holidays that combine nature, culture and local people.
- Aventoura - <http://www.aventoura.de> - specialised adventure tour operator, offering CBT programme called 'Fair Tours' (<http://www.fairtours.com>).
- Hauser Exkursionen - <http://www.hauser-exkursionen.de> - specialised active and adventure tour operator, offering CBT packages.
- Moja Travel - <http://www.moja-travel.net> - offers CBT holidays.
- Paradeast - <http://www.paradeast.com> - specialised cultural and adventure tour operator. They offer short volunteer projects.
- Sethiopia Reisen - <http://www.sethiopia-reisen.de> - tours focus on contact with local people.
- Sivali - <http://www.sivalitour.com> - offers ethnological tours and tribal visits.
- Troika Tour - <http://www.troika-tour.de> - tours including community visits.

### Finding trading partners

Internet sites and tourism trade fairs in Germany are good channels to find trading partners. Relevant sources to find prospects in Germany are:

- Association for Small and Medium-sized Tour Operators and Travel Agencies (ASR) - <http://www.asr-berlin.de> - click on 'Der Verband', then 'Mitgliedervorstellungen' to view members.
- CMT The Holiday Exhibition - <http://www.messe-stuttgart.de/cmt> - travel trade fair held every year in Stuttgart, January.
- Eco-travel - <http://www.eco-travel.de> - portal of travel information and sustainable travel tips. It can be used to search for potential trading partners.
- Forum Anders Reisen - <http://forumandersreisen.de/philosophie.php> - association of 150 tour operators committed to sustainable tourism.
- German Travel Association (DRV) - <http://www.driv.de> - comprises 4,500 travel companies, including CBT. To search for members, click on 'Mitgliedschaft', then 'DRV-Mitgliedsverzeichnis'.
- Mailing House INFOX - <http://www.infox.de> - INFOX provides weekly mailings (including suppliers' contact details) to German travel companies.
- International Travel Trade Show (ITB) - <http://www.itb-berlin.com> - one of the main travel trade fairs in the world, held yearly in Berlin (March).
- Reise Pavillion - <http://www.reisepavillon-online.de> - annual sustainable tourism trade fair. The next fair will be held in Munich in April 2011.
- TID - <http://tid.fvw.de> - a directory of the German travel and tourism industry. It can be bought as a book, CD or online access.

For a practical guide to German business culture, please refer to Kwintessential - <http://www.kwintessential.co.uk/resources/global-etiquette/germany-country-profile.html>.

### Useful sources

- Institute for Tourism and Development - <http://www.studienkreis.org> - provides travel information and seminars on tour operators' roles as cultural mediators.
- International Ecotourism Society (TIES) - <http://www.ecotourism.org> - main international eco-tourism association. The website features blog, forum and business portal for organisations related to eco-tourism and CBT globally.
- Sympathie Magazine - <http://www.sympathiemagazine.de> - socially responsible travel, issued irregularly.
- Research Foundation (Forschungsgemeinschaft) - <http://www.fur.de>.
- Verträglich Reisen - <http://www.vertraeglich-reisen.de> - sustainable travel magazine.