

THE GERMAN TRAVEL MARKET

Facts and figures 2024

Status: February 2025

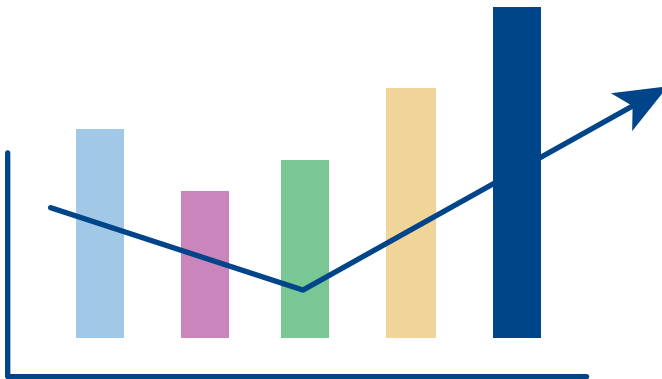


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GENERAL

Growth industry remains on track

Vacation demand higher than ever

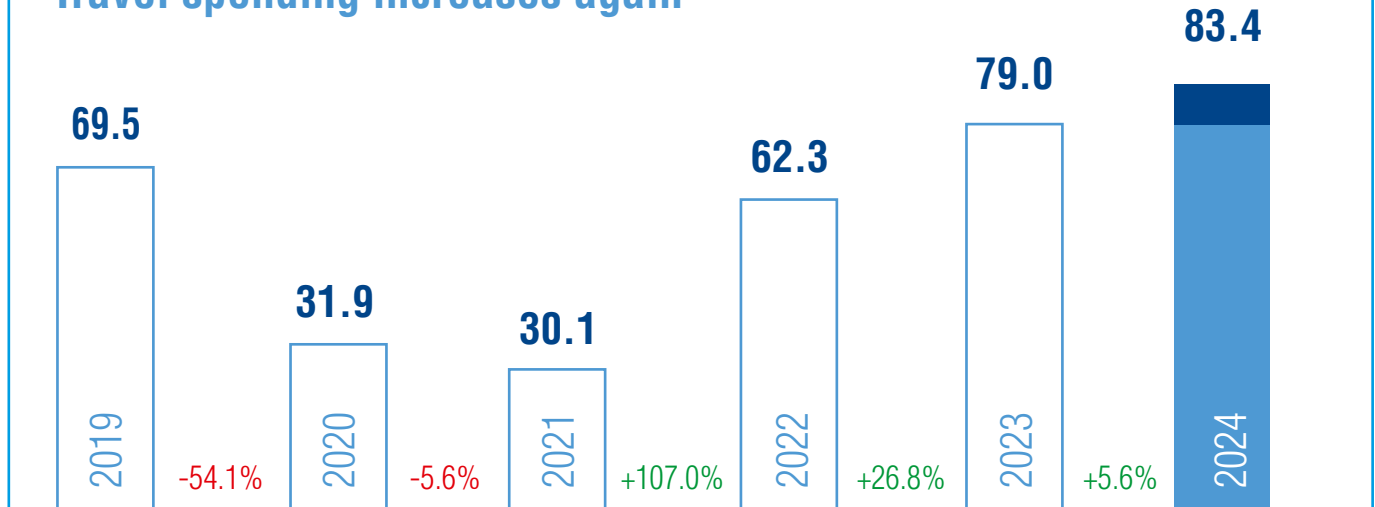
Travel spending increases again

Despite all the crises and economic challenges, Germans are still keen to go on vacation. They want to travel and they are traveling: the travel industry remains on a growth trajectory.

2020 saw a massive slump in travel spending due to the coronavirus pandemic. Two difficult years followed. The recovery then began in 2022 - still with restrictions on travel. Since 2023, sales have exceeded those of 2019 - the best year for the industry to date

Travel agencies and tour operators have benefited from the strong demand for package holidays: Germans were particularly drawn to foreign countries: package holidays to the Mediterranean and sun destinations on long-haul routes were the top sellers - along with cruises.

Travel spending increases again



The economic importance of the tourism industry in 2024 at a glance

68.3 million

Vacation trips lasting 5 days or more (previous year: 65.0 million)

over **50%**

of tour operator trips are booked by Germans at travel agencies

2,300

Tour operators in Germany

56.4 million

Travelers on vacation trips lasting 5 days or more (previous year: 54.6 million)

1.2

Trip frequency (average number of trips per traveler)

80.0%

Travel intensity (proportion of the population that travels)

2.9 million

Employees in the tourism industry in Germany (=7% of all jobs)

496.1 million

Overnight stays in Germany (+1.8%)

23.6%

of German citizens' trips will be to Germany in 2024

Market structure

in the German tourism market

2024

39.8 (47.7%)

Tour operators / travel agencies

Bookings for tour operators

9.2 (11.1%)

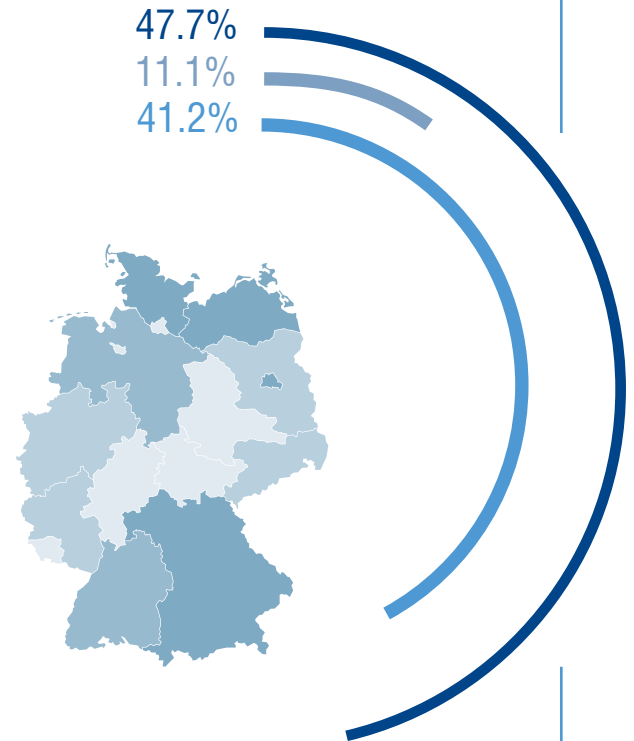
Product portals and others

Websites on which only one type of product is offered (e.g. hotel, flight, rental car portals)

34.4 (41.2%)

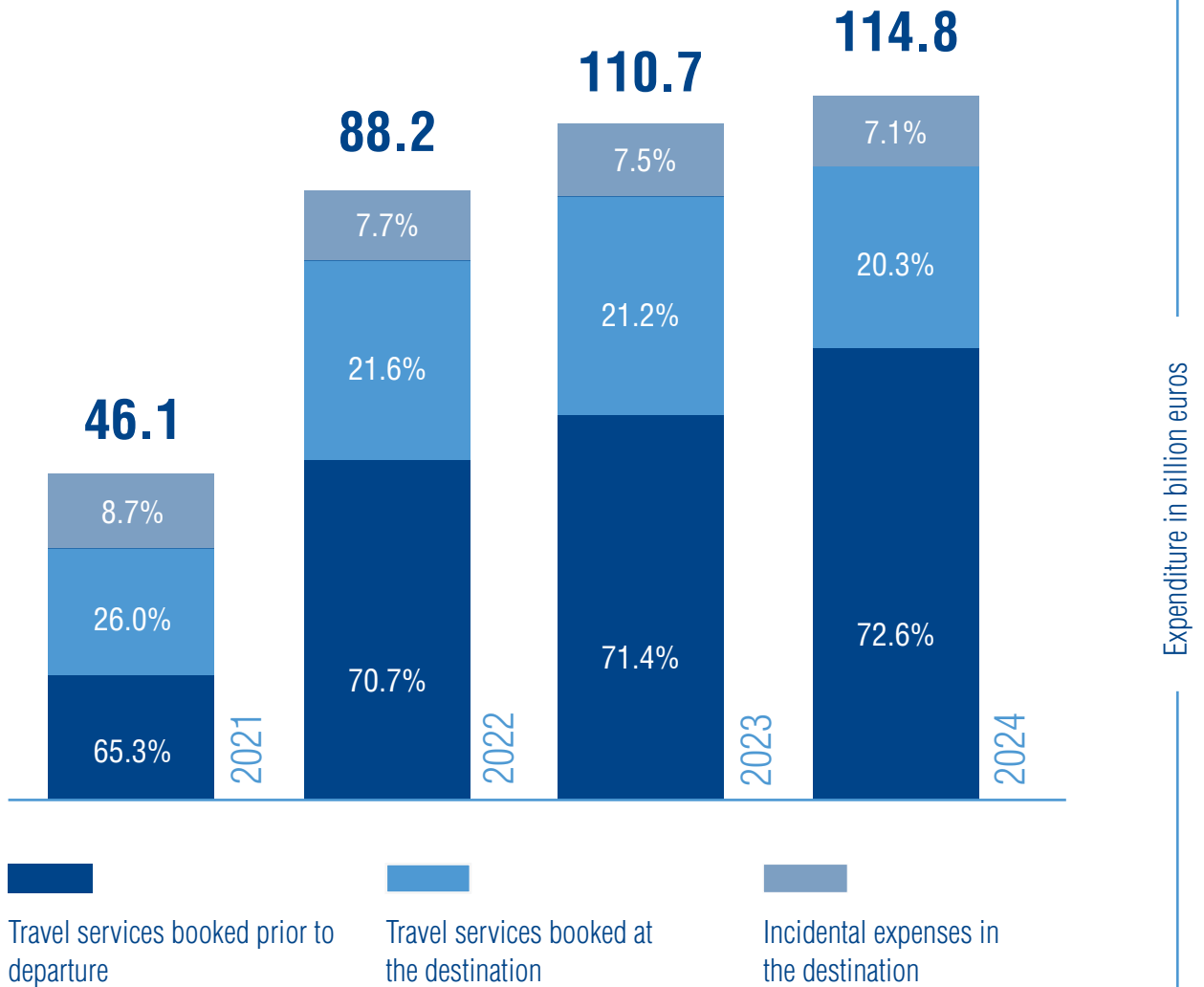
Service providers online & offline

Airlines, train and rental car companies, hotels, long-distance bus companies, event organizers, etc.



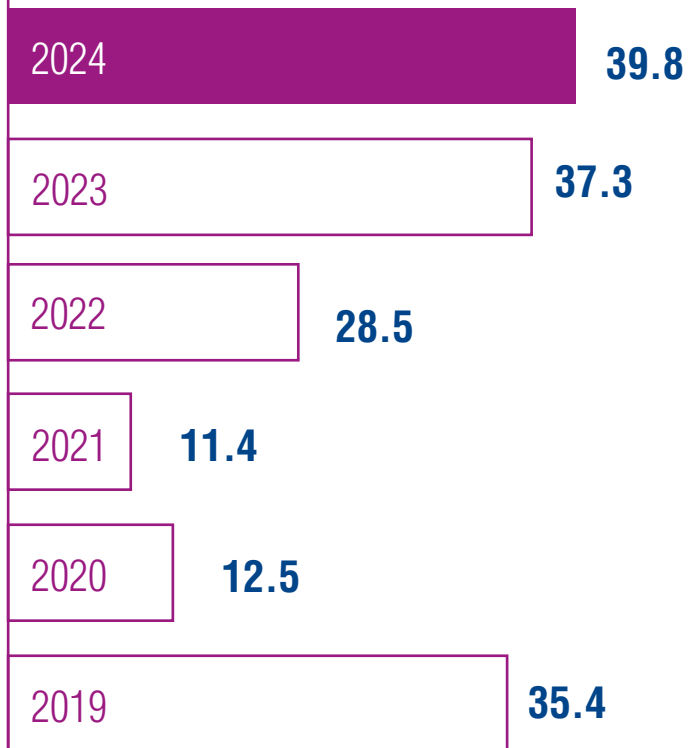
Expenditure in billion euros

Distribution of total expenditure on private and vacation trips by German private households with **at least one overnight stay**

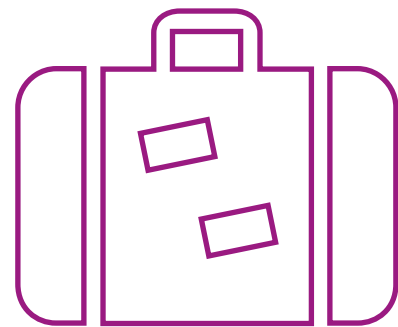


TRAVEL AGENCY AND TOUR OPERATOR MARKET IN GERMANY

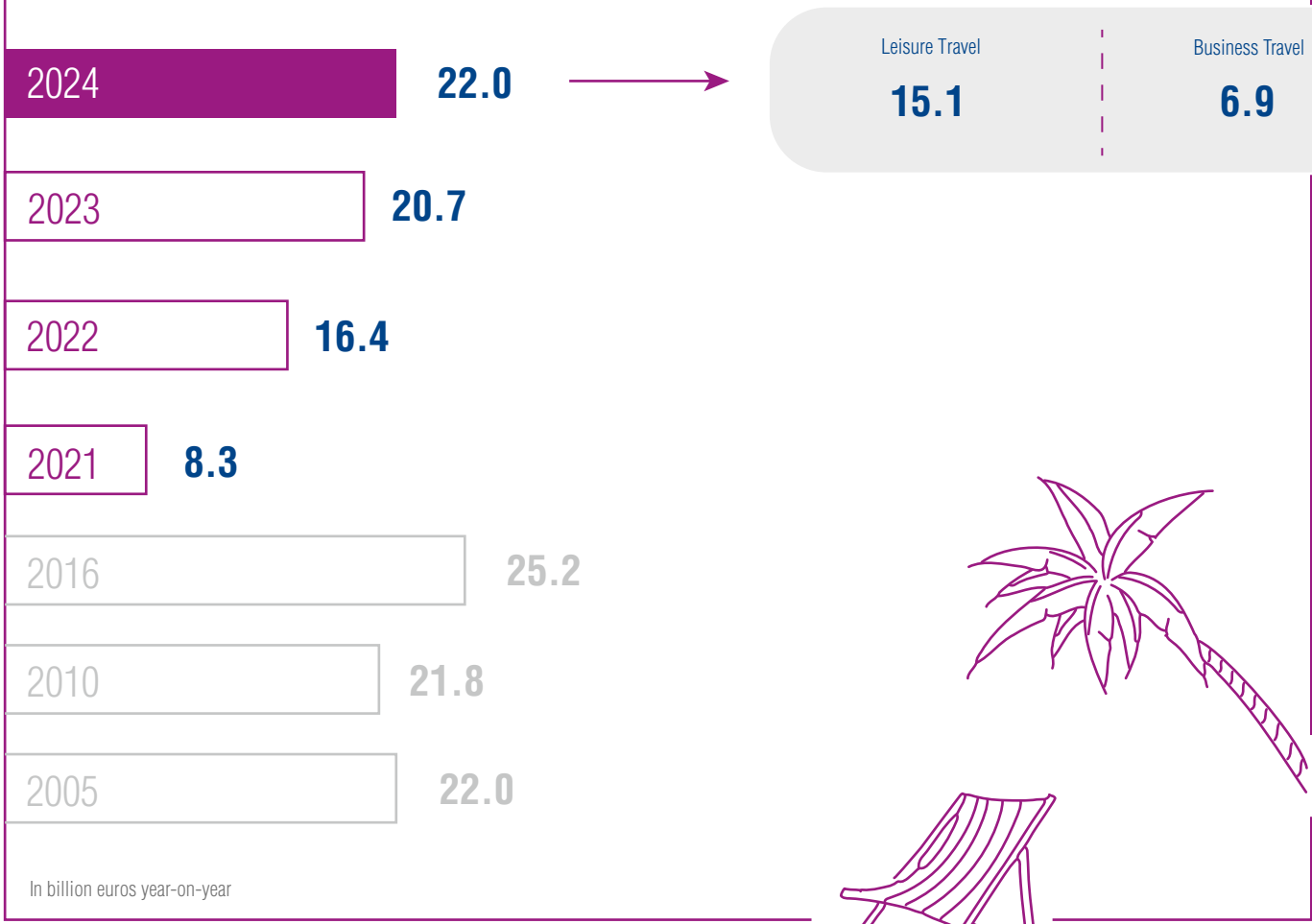
Development of tour operator sales in Germany



Travel expenditure in billion euros



Sales development of travel agencies with vacation and business trips

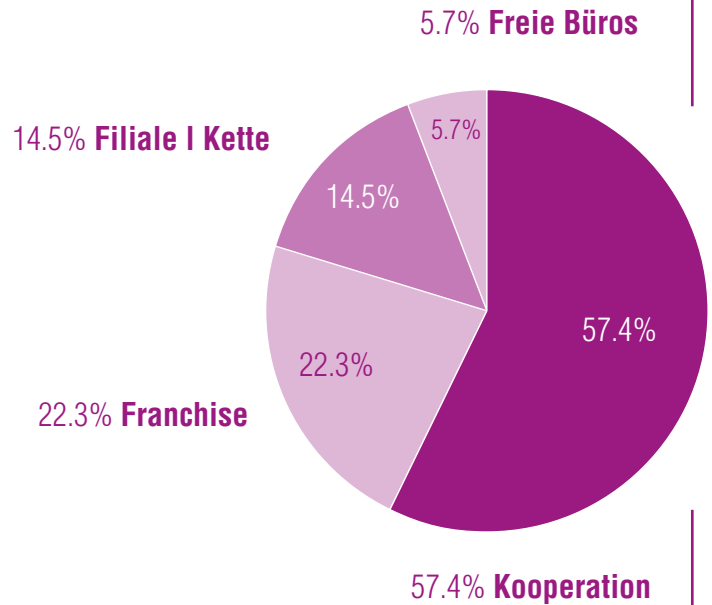


Number of
touristic travel agencies
in the German sales market

Travel agencies with stationary business and an active agency contract with at least one of the German tour operators with a turnover of over EUR 1 billion.

touristic travel agencies

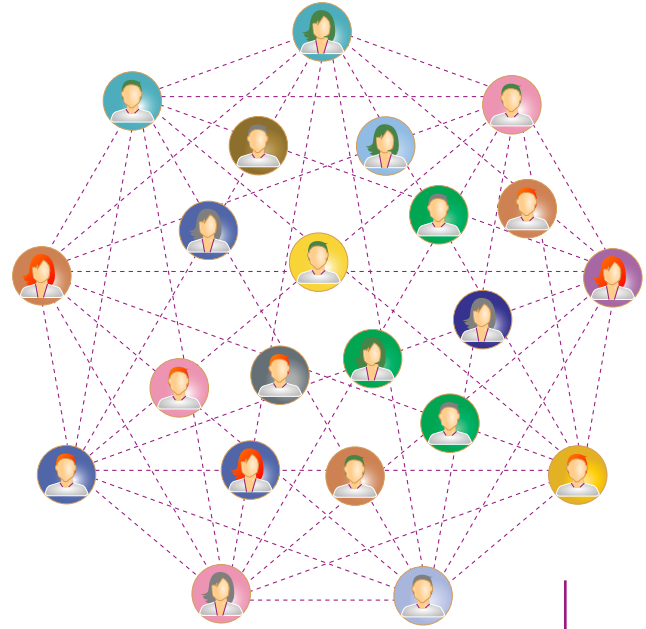
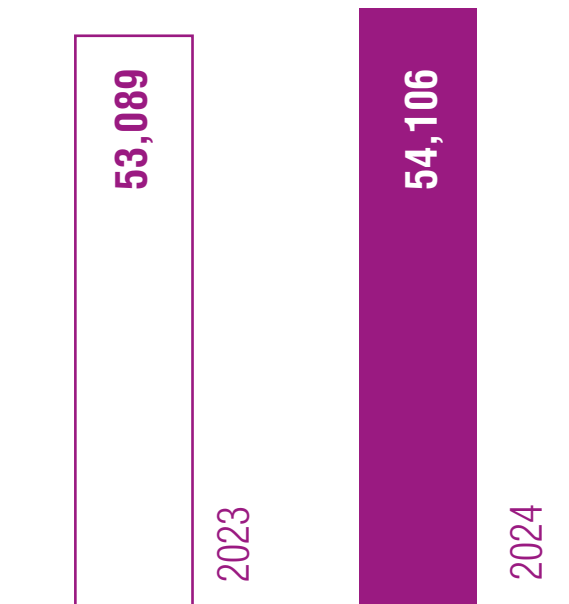
7,996



In addition, there are around 3,900 other sales outlets. These are micro-enterprises or sideline businesses.

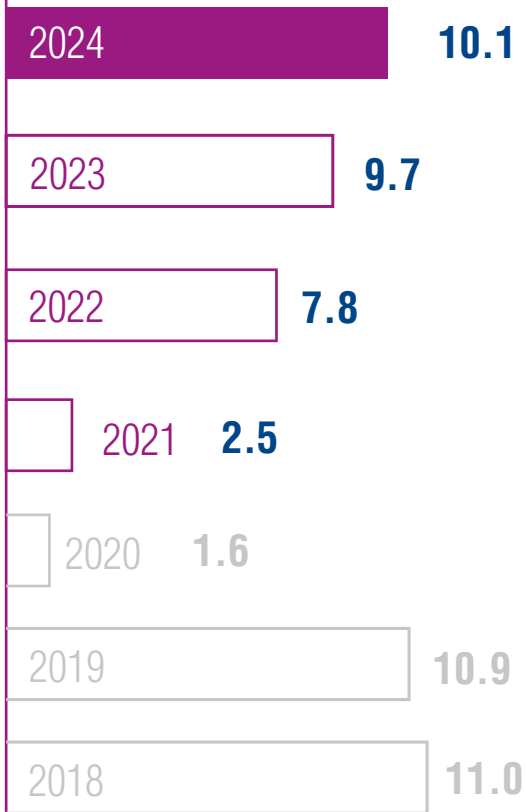
At travel agencies and tour operators

Employees subject to social security contributions

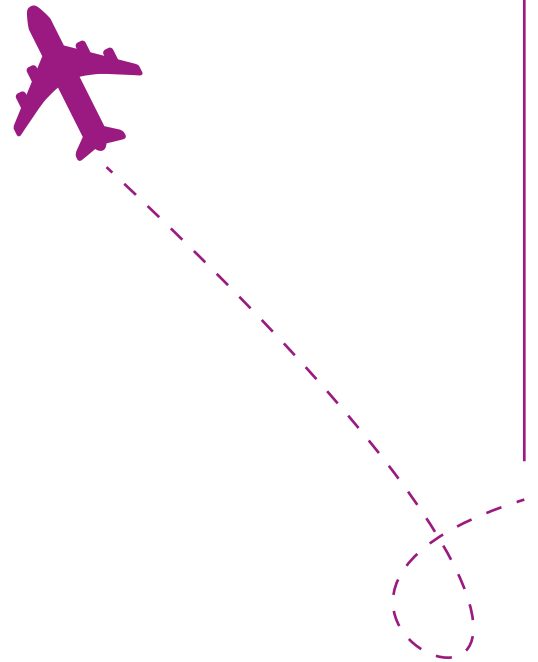


An increase of 1.9%

Flight ticket sales of the
IATA-Airlines
via travel agencies in Germany



In billion euros



In Germany, air ticket sales processed via the Billing and Settlement Plan (BSP) system of the International Air Transport Association (IATA).

DESTINATIONS IN GERMANY AND ABROAD

International tourist arrivals

Following the drastic decline in global tourist arrivals in 2020, international tourism has largely recovered.

In 2024, there were 1.4 billion tourist arrivals. This was only slightly below the 2019 level of 1.5 billion tourist arrivals.

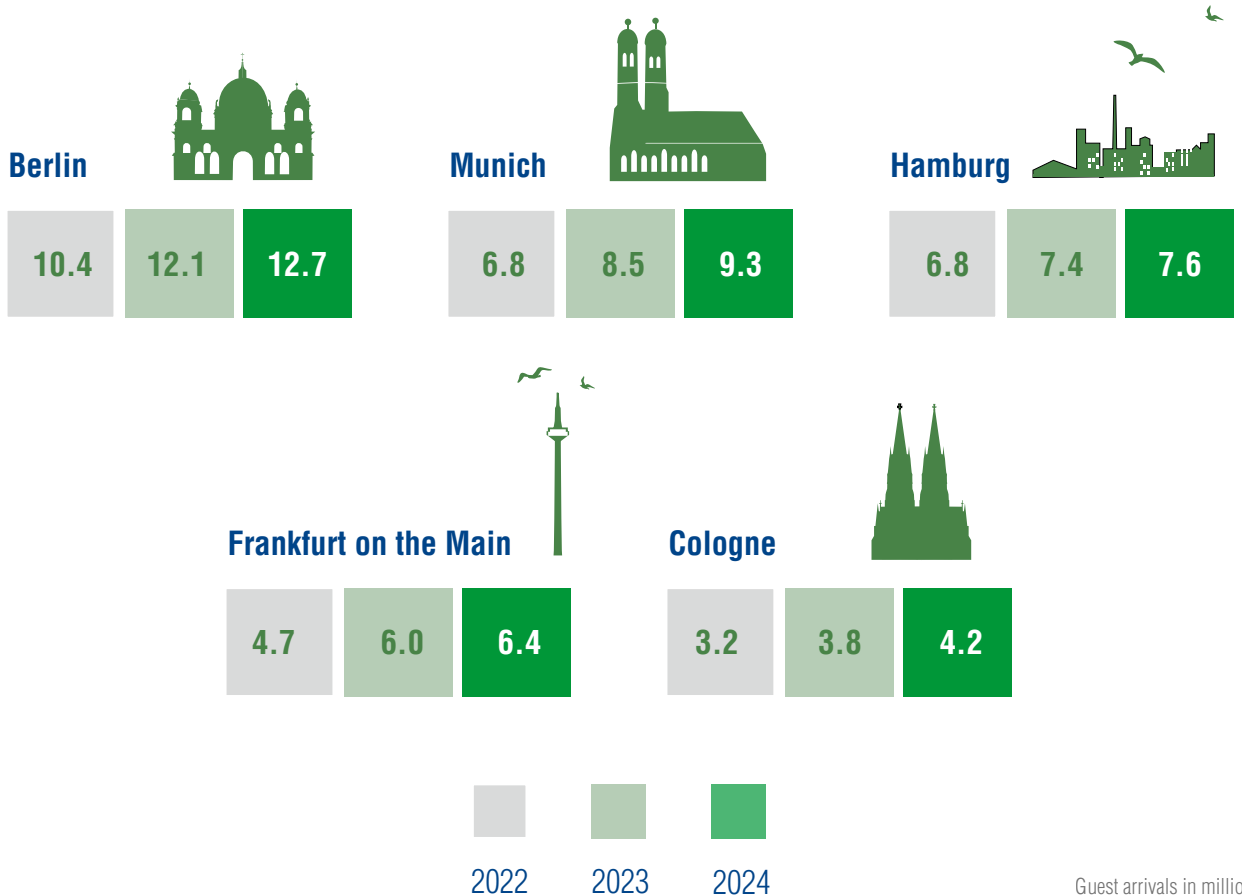
	2022	2023	2024
World	-37%	-11%	-1%
Europe	-18%	-5%	+1%
Asia/Pacific	-74%	-34%	-13%
North-/South America	-28%	-9%	-3%
Africa	-31%	-5%	+7%
Middle East	-5%	+31%	+32%

Rate of change compared to 2019 in each case

The 5 most popular

City break destinations for Germans and foreigners

in Germany 2024



The recovery in tourism is also evident in city breaks.

The importance of
short-term rentals
throughout Germany

This resulted in direct expenditure of € 8.2 billion

2.5 billion I of which **for accommodation**

→ **1.9 billion I** of which **for hosts**

2.2 billion I of which **for trade**

1.9 billion I of which **for restaurant visits**

1.0 billion I of which **for maintenance**

0.5 billion I of which **for transportation**

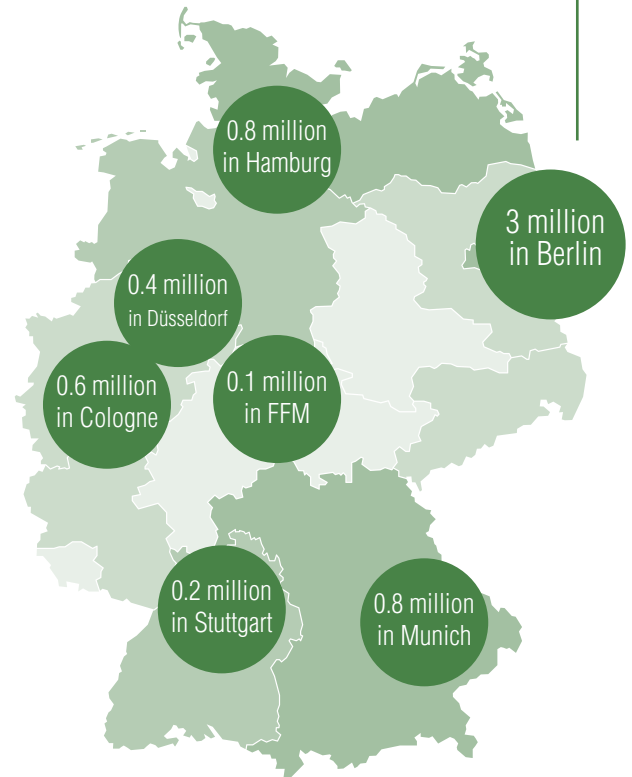
The distribution in Germany:

40% | rural areas

30% | Small to medium-sized cities

30% | Large cities

There were a total of
49.3 million
overnight stays in the
short-term rental sector.



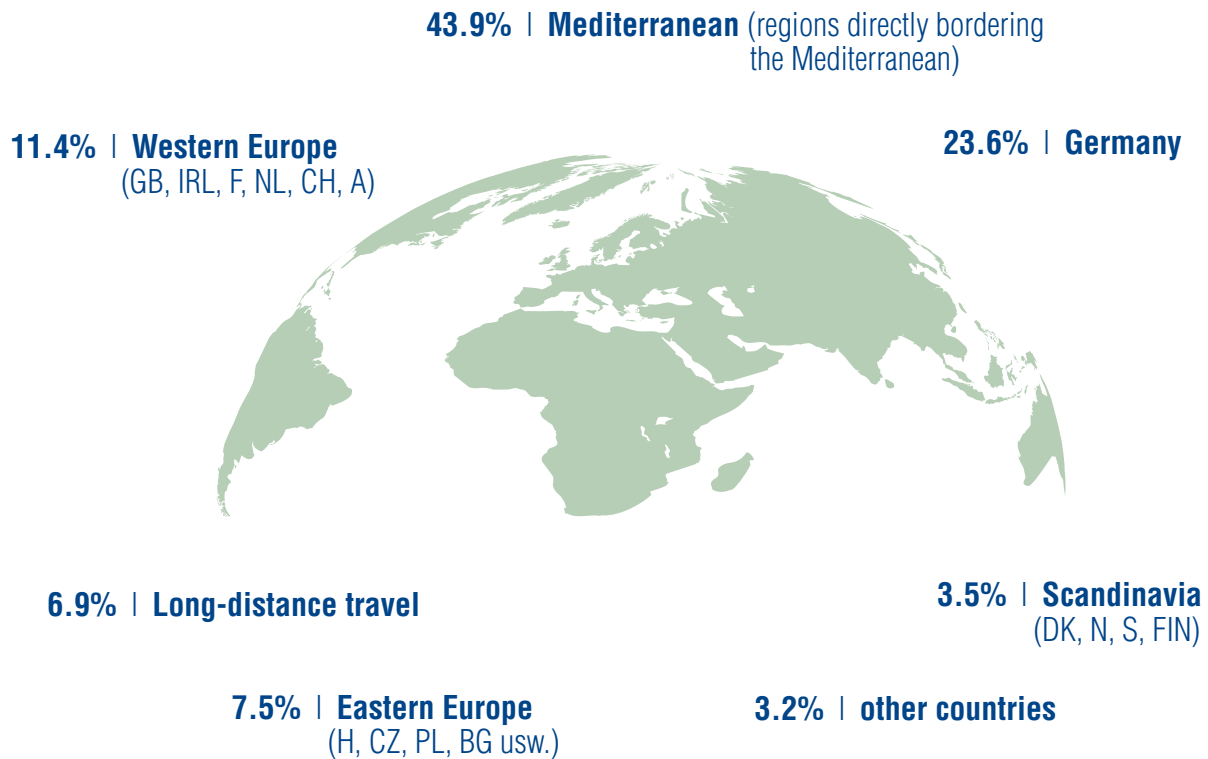
The
vacation destinations
of Germans worldwide

68.3 million

Long vacations in Germany

76.4% thereof abroad

23.6% thereof in Germany

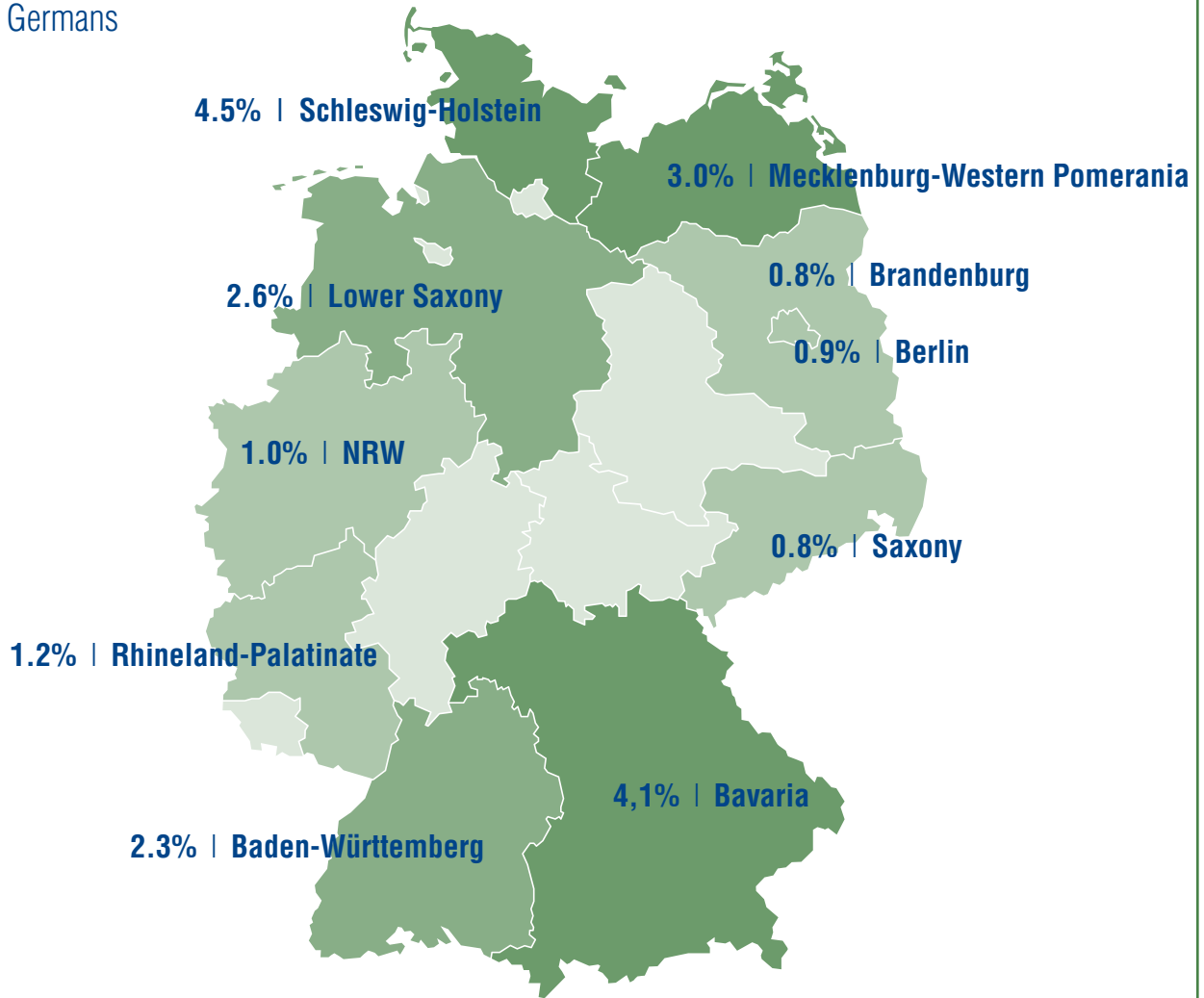


Vacation trips lasting five days or more 2024

The 10 most popular

Domestic vacation destinations

of the Germans

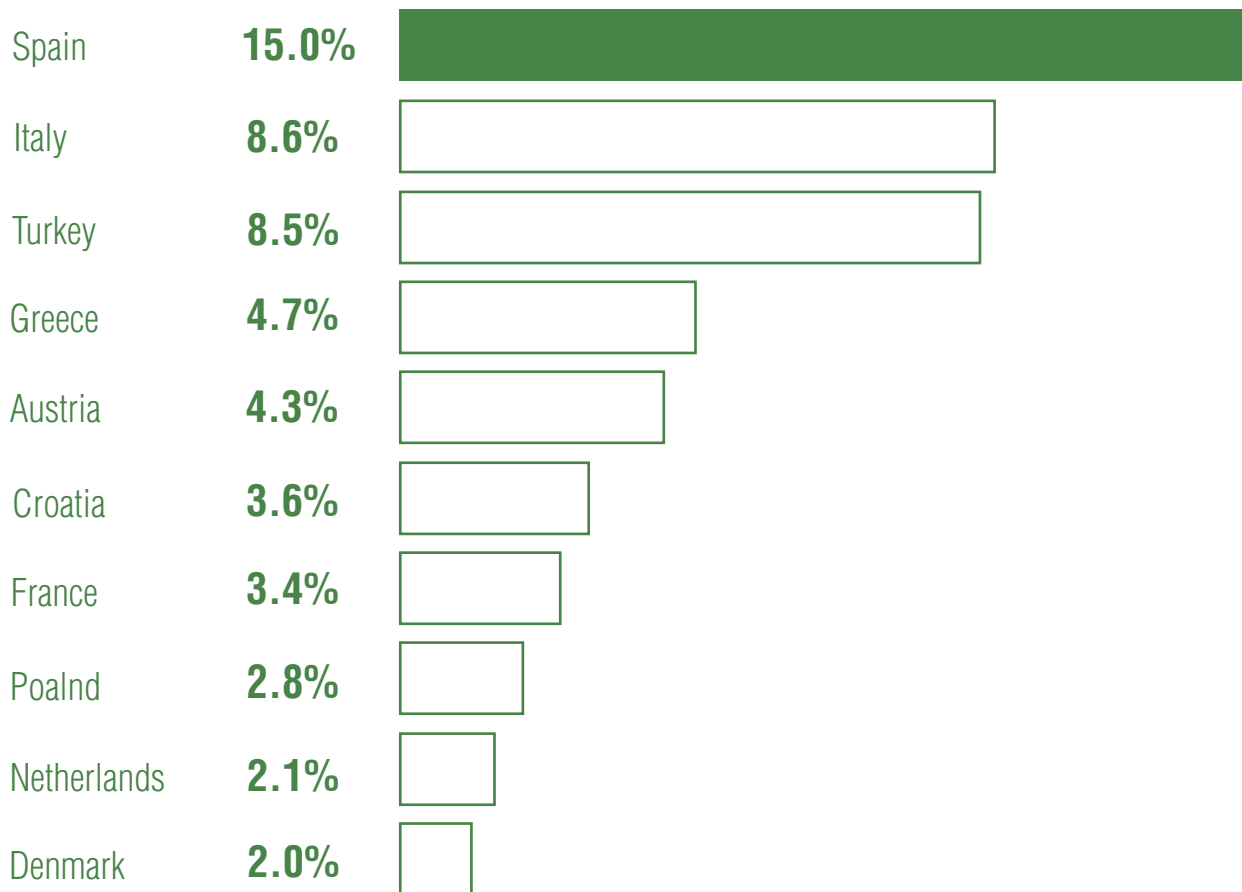


Vacation trips lasting five days or more 2024

The 10 most popular

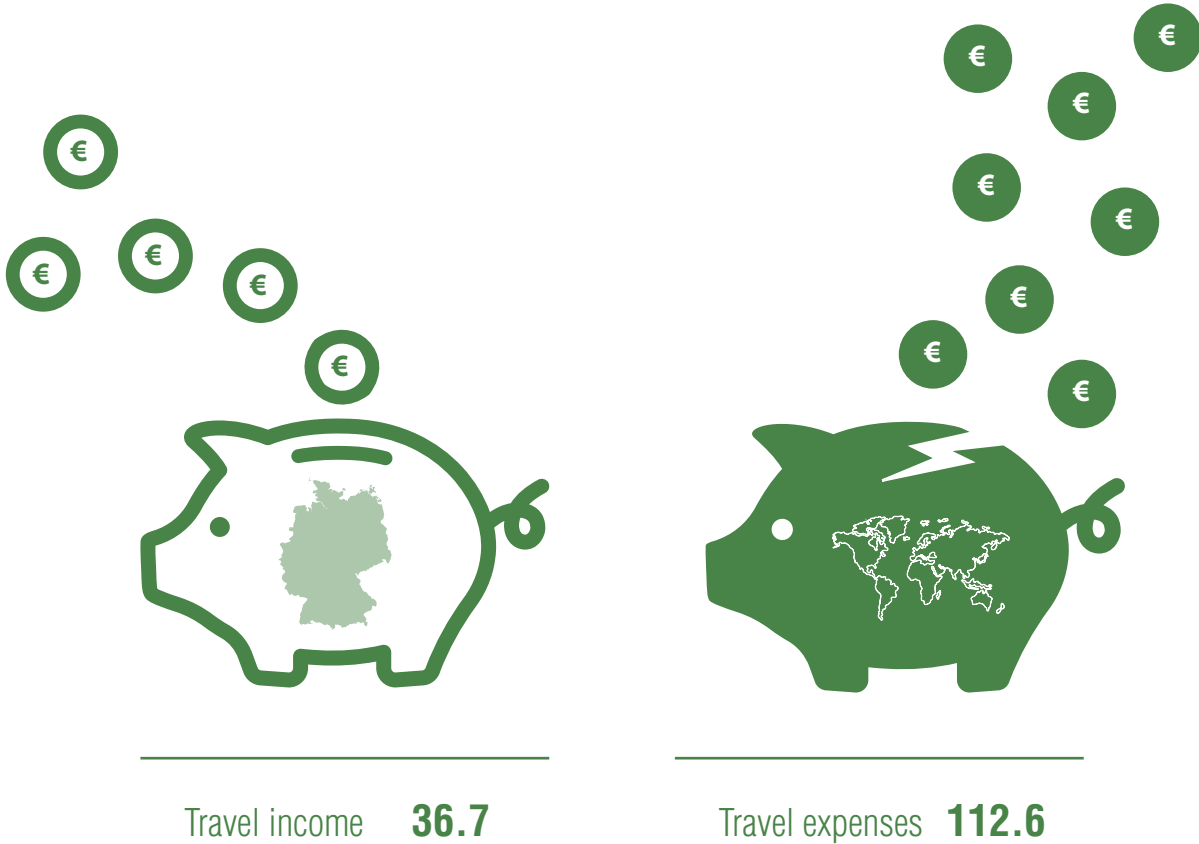
Vacation destinations abroad

of the Germans

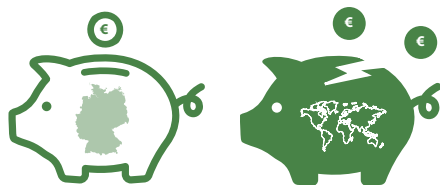


Vacation trips lasting five days or more 2024

The
travel income and travel expenses
of Germans in international travel



In billion euros



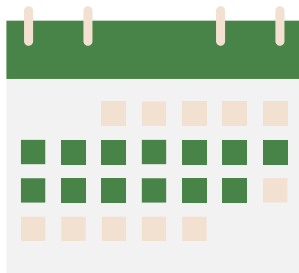
Income refers to Germany's income from international travel.

Expenses is the amount spent by Germans on trips abroad.

	Income	Expenses
2024	36.7	112.6
2023	34.6	106.8
2022	30.3	85.2
2021	18.8	43.2
2020	19.4	34.0
2019	37.3	83.3
2010	26.2	58.9

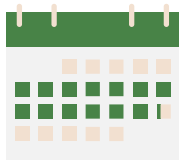
In Mrd. Euro

The average trip duration

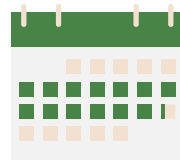


13.0

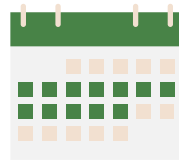
was the average trip duration in 2024.



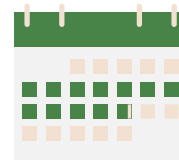
13.3
2023



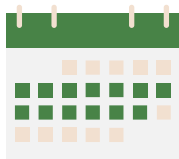
13.2
2022



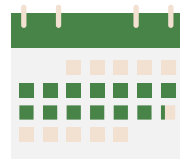
12.0
2021



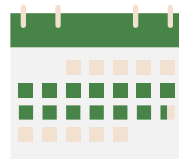
11.6
2020



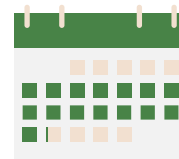
13.0
2019



13.2
2010



13.4
2008

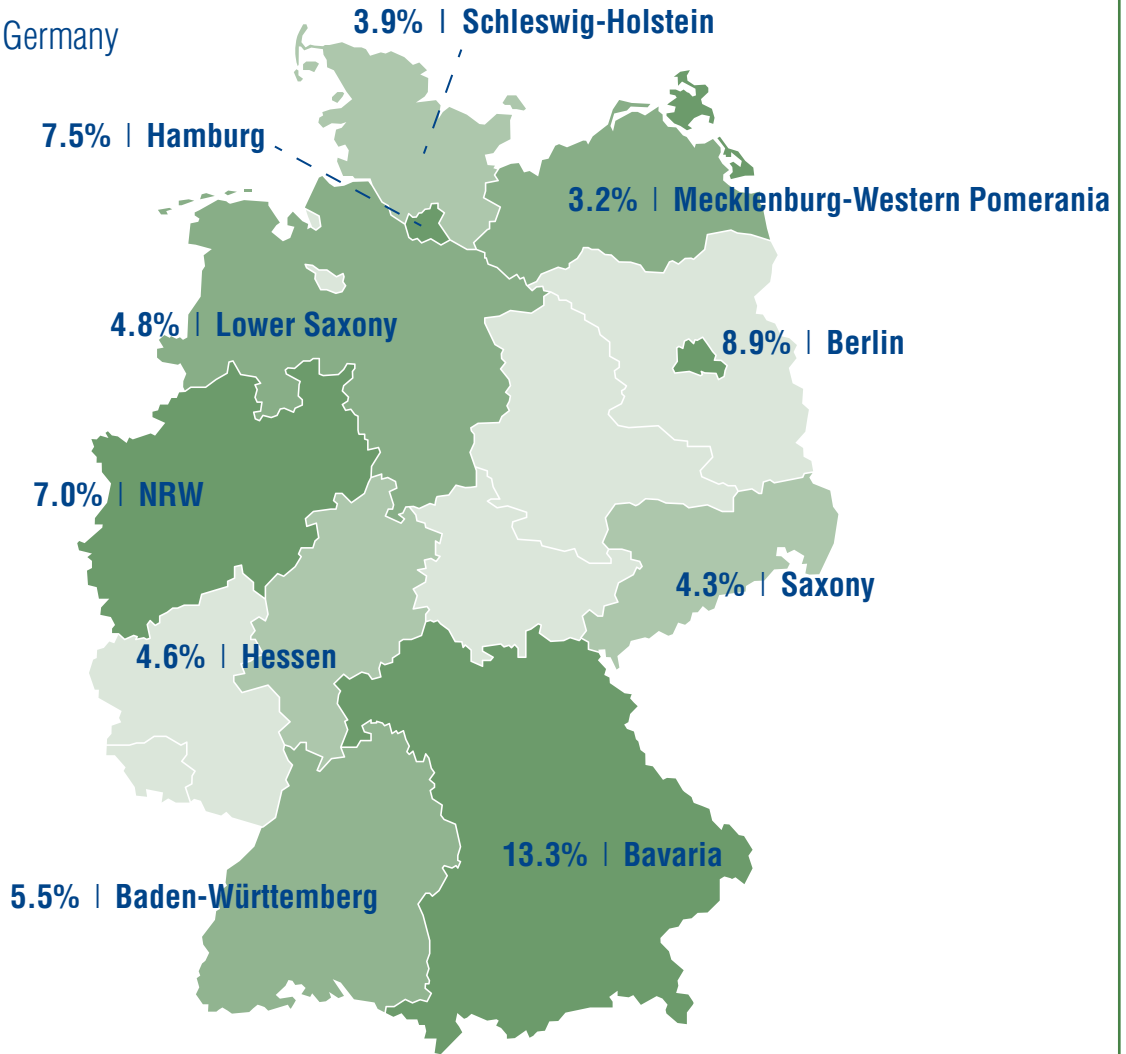


15.1
1998

∅ Length of stay in days

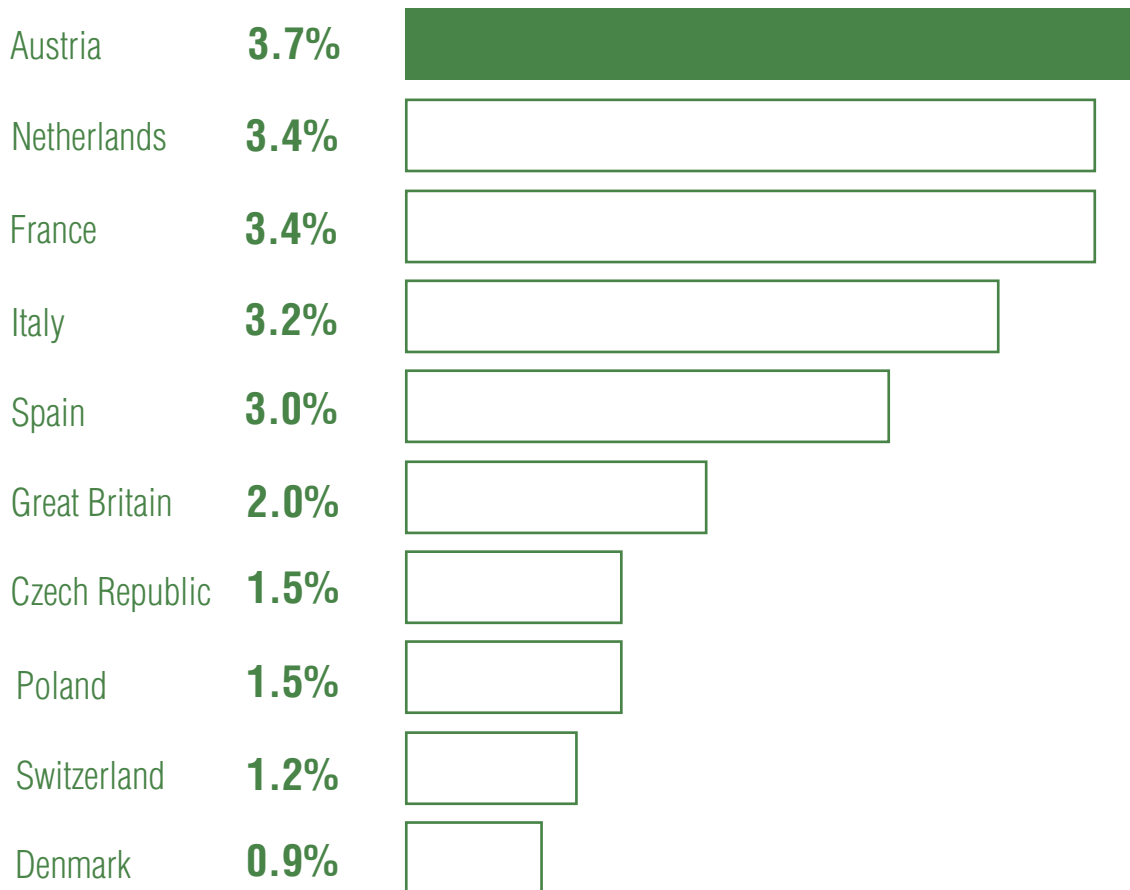
The 10 most popular
short vacation destinations

for Germans in Germany



Share of all short breaks, travel duration two to four days 2024

The 10 most popular
short vacation destinations
of Germans abroad



Share of all short breaks, travel duration two to four days 2024

The short breaks at home and abroad of the Germans 2024

Travel duration two to four days

Domestic: 73%, of which 53% are short breaks with the destination “domestic city”.

Abroad: 27%, of which 34% short breaks with the destination “city abroad”.

Domestic: 73%
Abroad: 27%

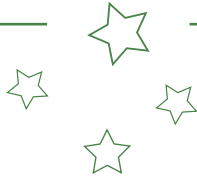
93.8 million
trips in total

The daily trips of Germans in 2024

Number of one-day private trips in thousands (from 50 km distance)



All
overnight stays
in Germany



End of 2023:



29,768
Companies



996,102
Rooms



113 €
Ø Room
price

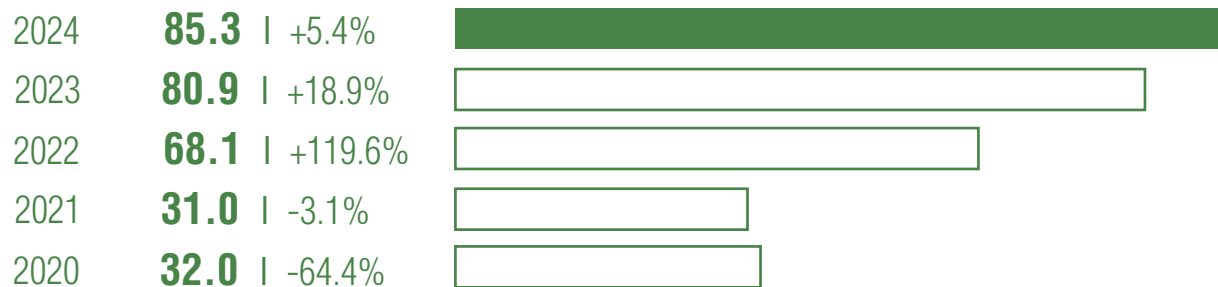


65.1%
Ø Room
occupancy

Overnight stays by German visitors



Overnight stays by foreign visitors

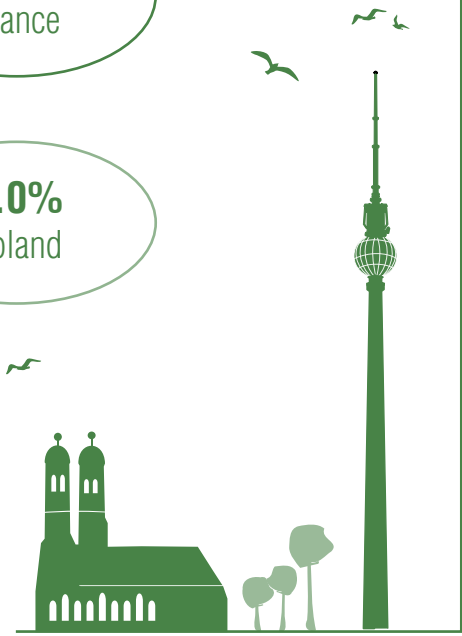
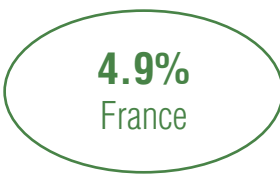
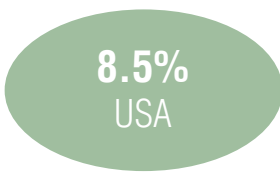
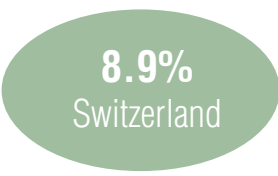


The total number of overnight stays in Germany amounted to 496.1 million.

The most important

Source markets for travel

to Germany

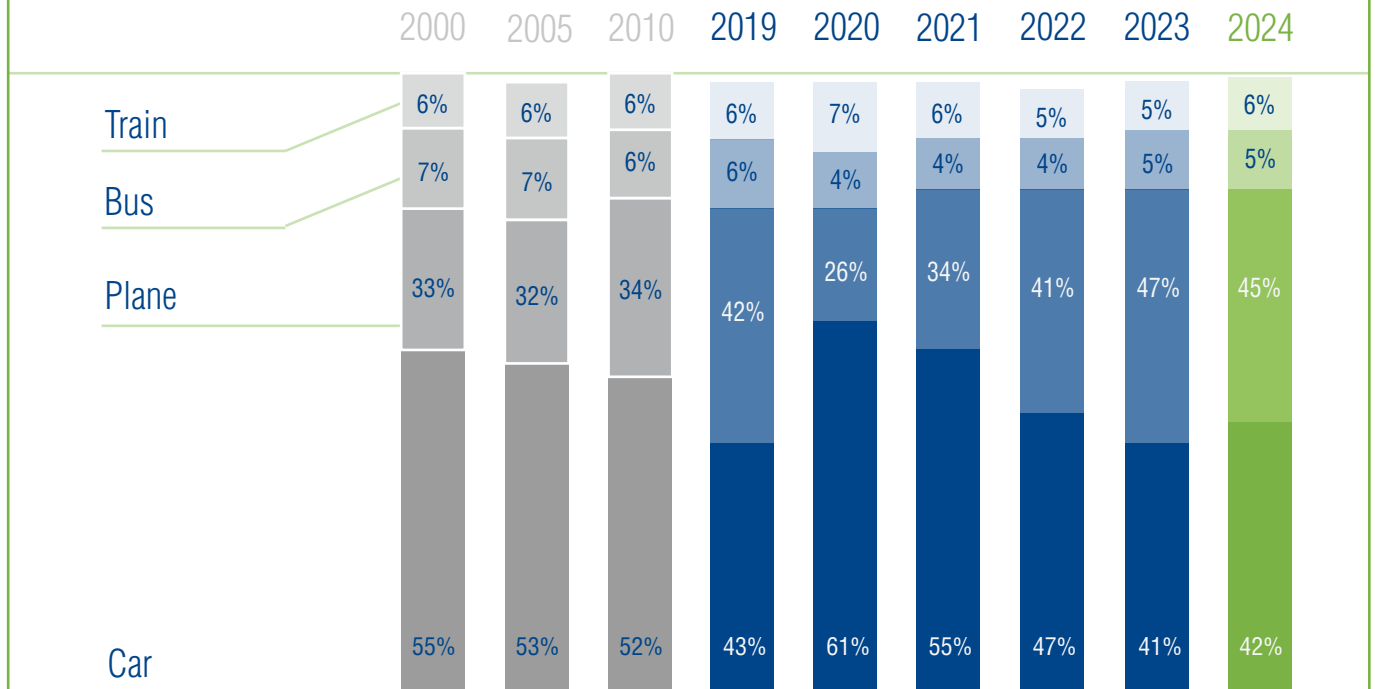


Share of all overnight stays from abroad 2024

MEANS OF TRANSPORTATION

The most popular means of transport for vacation travel

Difference to 100 percent: other means of transportation, e.g. ship



Vacation trips by Germans lasting 5 days or more, share in percent

The 5 largest
airports
in Germany

61.5 - - - - Frankfurt on the Main

41.5 - - - - Munich

25.5 - - - - Berlin

20.0 - - - - Duesseldorf

14.8 - - - - Hamburg

Number of passengers in 2024 in millions

Passenger volume

in air traffic

Europe 69.2%
Germany 11.3%
Intercontinental 19.5%

146.4 ----- Europe (+ 8.0% | 69.2%)

23.9 ----- Germany (+ 3.5% | 11.3%)

41.3 ----- Intercontinental (+ 8.3% | 19.5%)

211.6 million passengers

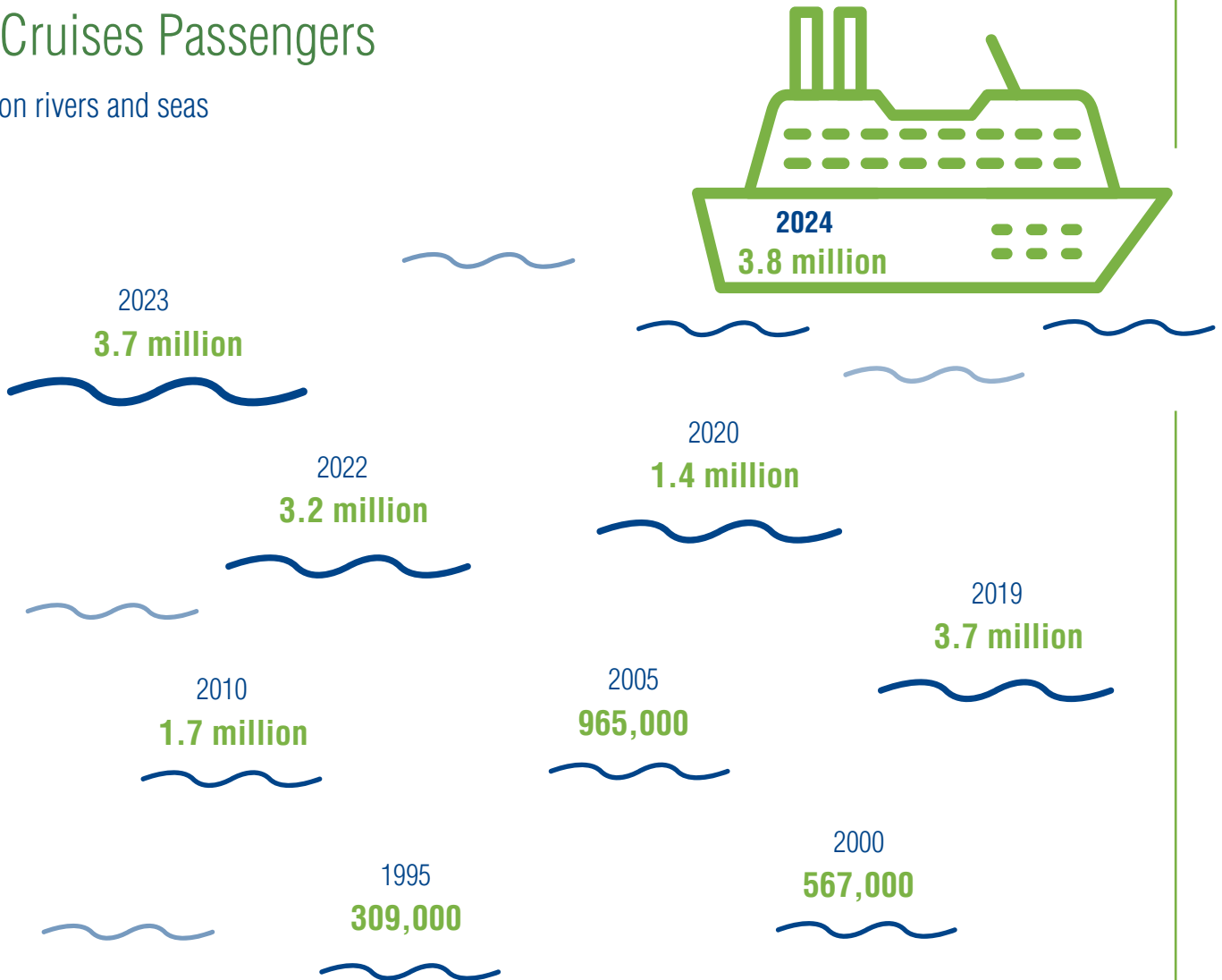
in total air traffic (without transit)



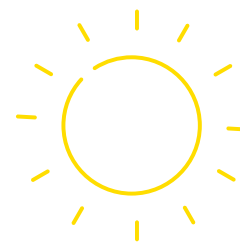
Following the sharp declines due to the coronavirus measures, air traffic continued to recover in 2024, with a total of 211.6 million passengers taking off and landing at German airports (2023: 196.1 million), an increase of 7.5% compared to 2023.

Cruises Passengers

on rivers and seas



The cruise market in Germany



Ocean cruises

	2021	2022	2023	2024
Passenger numbers	736,600	2,526,100	2,961,900	3,003,700
Expenditure in advance in € million	907.9	3,423.8	4,649.6	5,280.7
Expenditure in advance p.p./trip	1,233 €	1,355 €	1,570 €	1,758 €
Ø Trip duration	8.8 Nights	9.8 Nights	10.1 Nights	10.0 Nights

River cruises

	2021	2022	2023	2024
Passenger numbers	209,400	644.,00	700,000	840,200
Expenditure in advance in € million	241.2	685.3	829.1	1,001.3
Expenditure in advance p.p./trip	1,152 €	1,063 €	1,184 €	1,198 €
Ø Trip duration	7.4 Nights	7.6 Nights	7.4 Nights	7.3 Nights



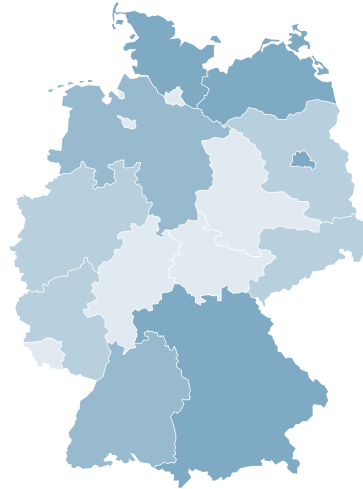
BUSINESS TRAVEL MARKET

Developments in the German Business travel market 2023



	2021	2022	2023
Number <small>in million</small>	41.4	75.1	116.7
Average costs <small>in euro</small>	334	371	409
Cost per person / day <small>in euro</small>	147	154	152
Total overnight business trips <small>in million</small>	24.1	47.6	82.3
Total costs <small>in billion euros</small>	13.4	26.9	46.2
of which companies with 10-500 employees <small>in billion euros</small>	10.2	21.0	35.9
of which companies with >500 employees <small>in billion euros</small>	3.2	5.9	10.3

In **2023**, there were a total of **116.7 million business trips** by employees of companies based in Germany.



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