



THE GERMAN TRAVEL MARKET

Facts and figures 2023

Status: March 2024

The German Travel Market

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2022

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Growth industry back on track

HOLIDAY DEMAND BACK TO PRE-PANDEMIC LEVELS

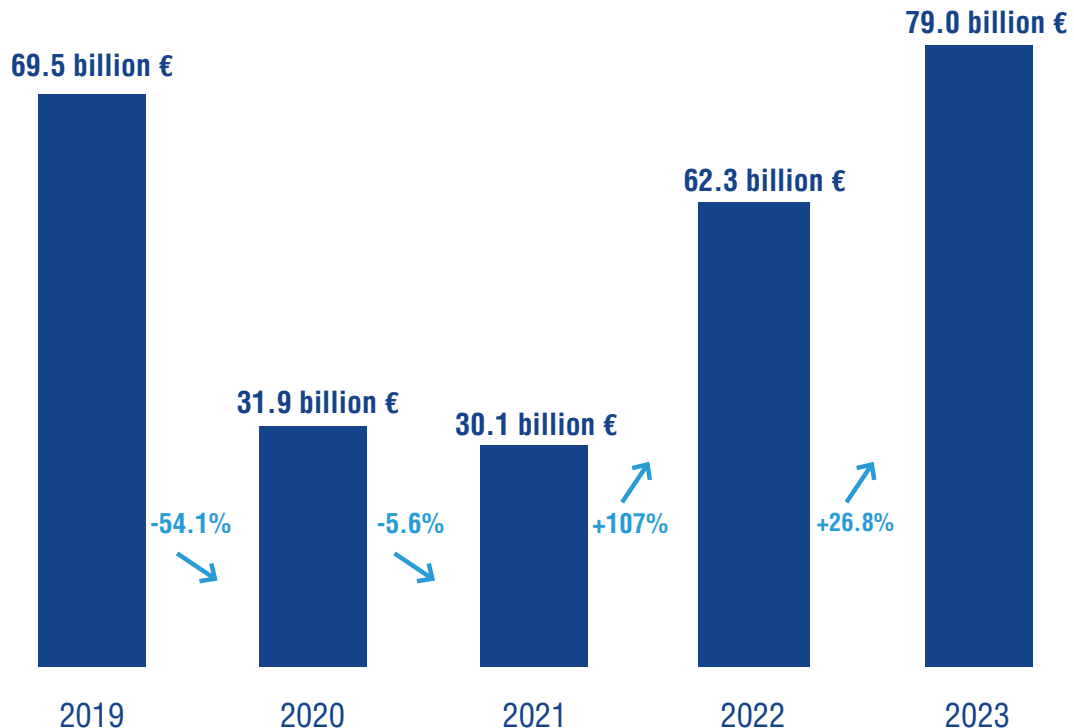
Travel spending increases significantly

Germans want to travel and they are travelling: the holiday travel market is visibly recovering from coronavirus - the travel industry has returned to growth. The pandemic caused travel spending to plummet. This was followed by two difficult years for the travel industry. The recovery then began in 2022 - but still with restrictions on travel. 2023 is the first travel season since coronavirus to close well above the pre-pandemic figures.

Travel spending rose by around 27 per cent - to a new record of **79 billion euros**. Travel agencies and tour operators benefited from the strong demand for package holidays.

Germans were particularly keen to travel abroad: package holidays to the Mediterranean and sunshine destinations on medium and long-haul routes were - alongside cruises - the top sellers among tour operators.

Travel spending is on the rise again



The ECONOMIC IMPORTANCE

of the tourism industry at a glance



65.0 million

holiday trips of
days or more
(previous
year: 67.1 million)



more than 50%

of the tour operator
trips the Germans
book via travel agency



2,300

tour operators
in Germany



54.6 million

persons on holiday trips
of 5 days or more
(previous
year: 52.9 million)



1.2

Frequency of travel
(Average number of
holiday
trips per traveller)



77.1%

Travel intensity
(percentage of
population travelling)



2.9 million

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



487.2 million

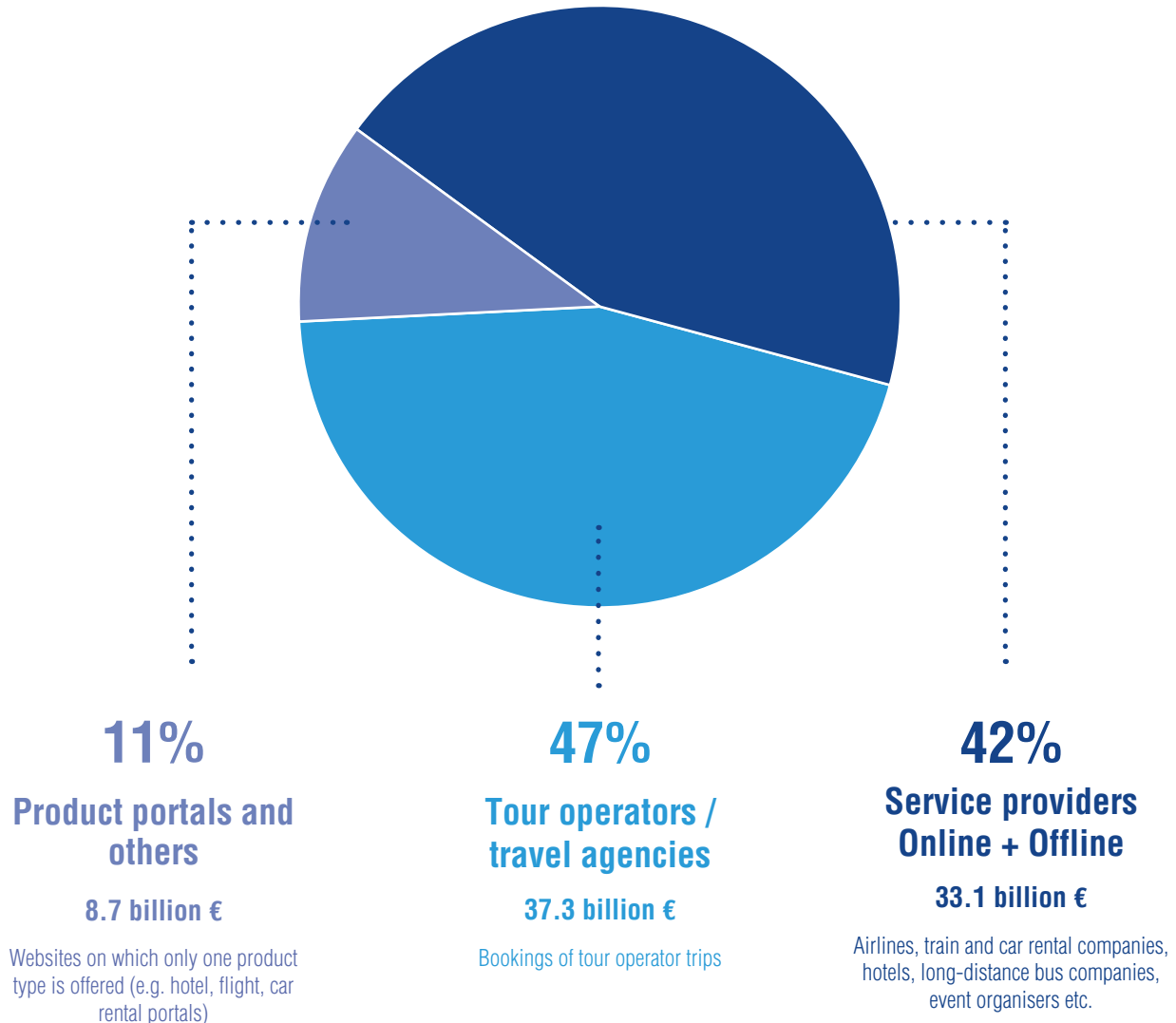
overnight stays by
residents
and non-residents in
Germany (+8.1%)



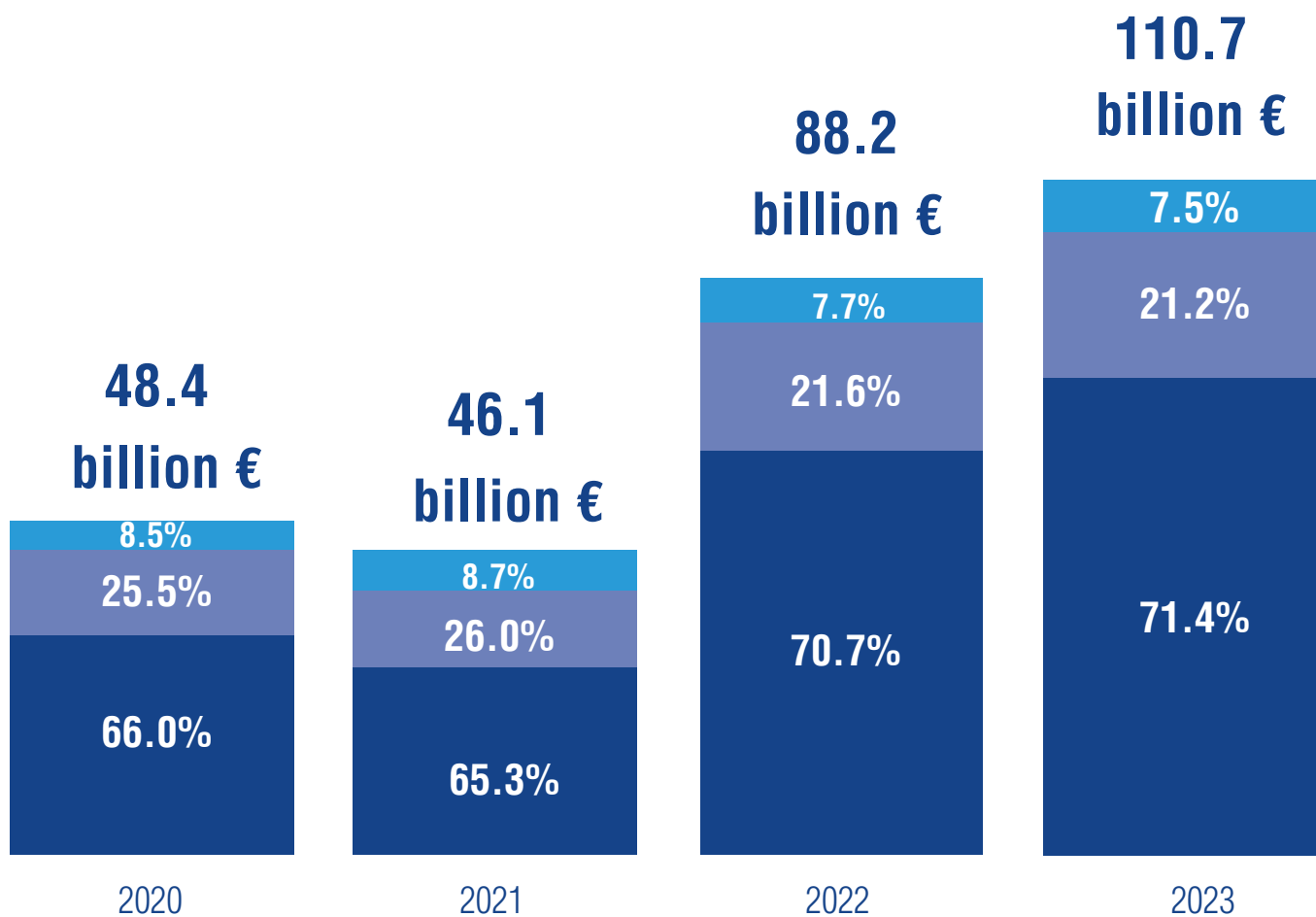
≈ 22%

of the journeys of German
citizens are spent in
Germany
in 2023.

Market structure in the GERMAN TOURISM MARKET 2023



Distribution of total expenditure on private and holiday travel of German households with at least one overnight stay



● Auxiliary expenditure in the destination
 ● Travel services booked in the destination
 ● Travel services booked before departure

TRAVEL AGENCY AND TOUR OPERATOR MARKET IN GERMANY



Development of the TOUR OPERATOR SALES in Germany

35.4 billion €
Total turnover
2019



12.5 billion €
Total turnover
2020



11.4 billion €
Total turnover
2021



28.5 billion €
Total turnover
2022



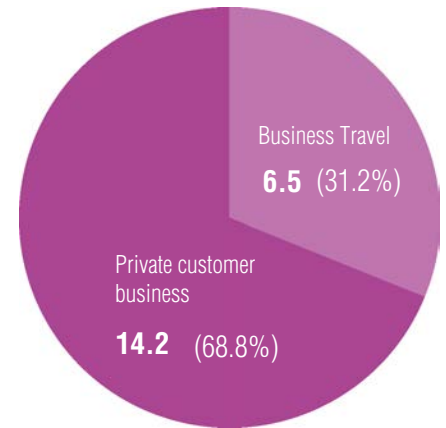
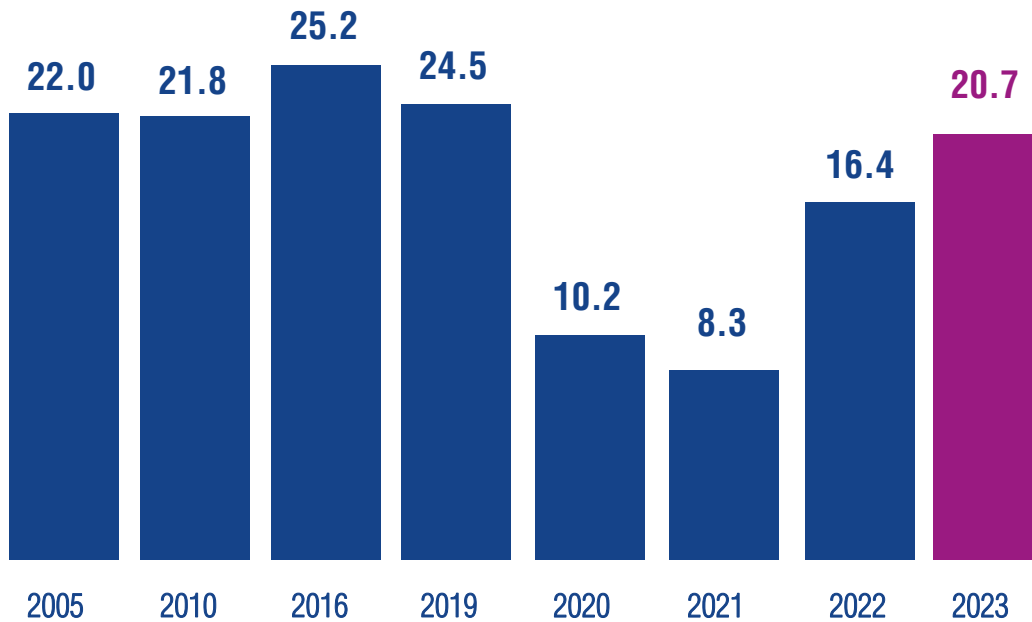
37.3 billion €
Total turnover
2023



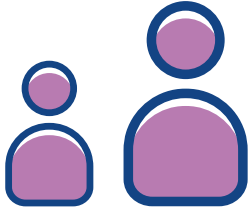
TRAVEL AGENCIES

make a difference

Sales development in billion Euros (holidays and business travel)



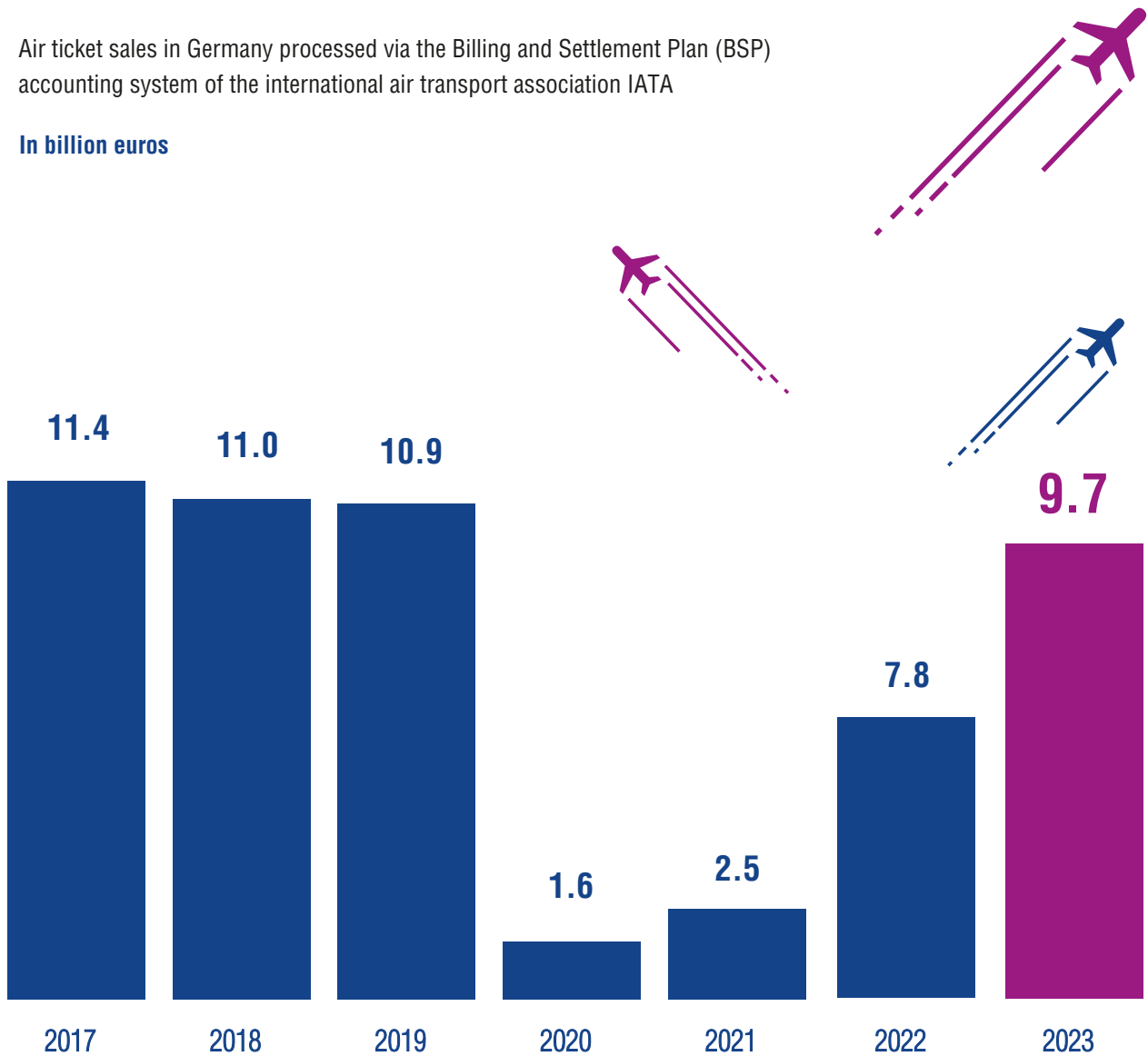
Employees of **TRAVEL AGENCIES AND TOUR OPERATORS**



Flight ticket sales of IATA-AIRLINES via travel agencies in Germany

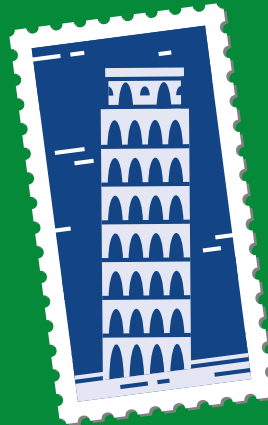
Air ticket sales in Germany processed via the Billing and Settlement Plan (BSP) accounting system of the international air transport association IATA

In billion euros



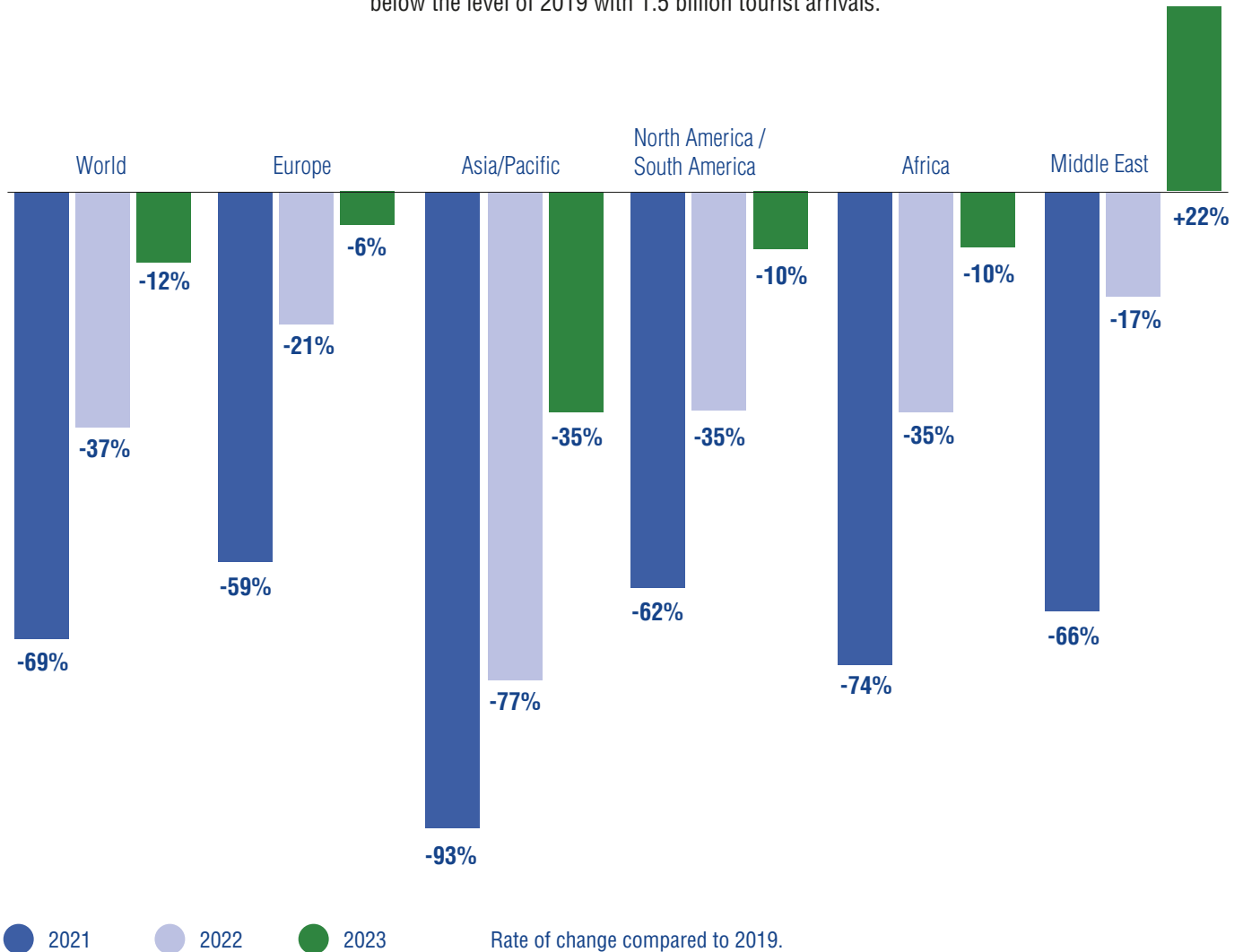


DESTINATIONS IN GERMANY AND ABROAD



International TOURIST ARRIVALS

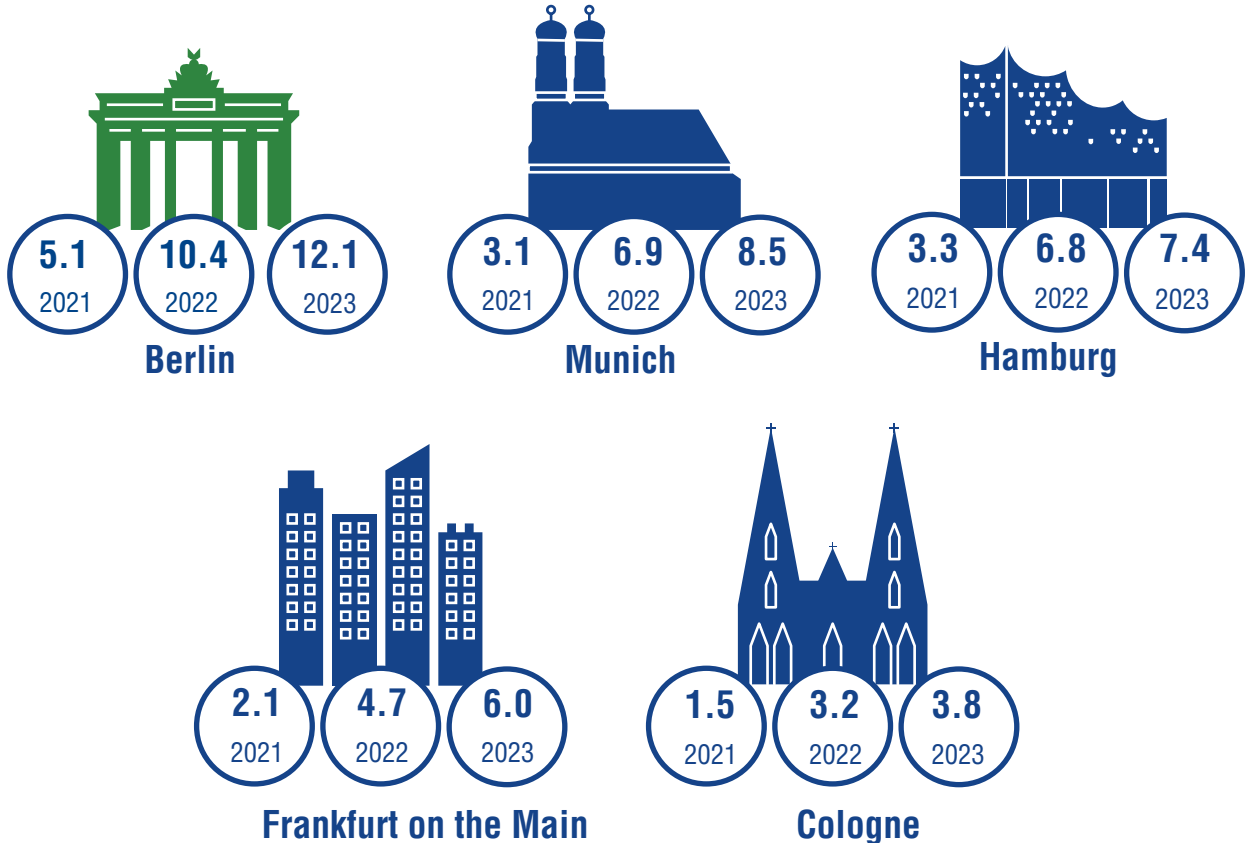
After the dramatic decline in global tourism arrivals in 2020 international tourism has largely recovered. In 2023, there were 1.3 billion tourist arrivals. These were therefore only slightly below the level of 2019 with 1.5 billion tourist arrivals.



The 5 most popular **CITY TRIPS** in Germany 2023

The recovery in tourism is also evident in city breaks.

Guest arrivals, in million visitors



The HOLIDAY DESTINATIONS OF THE GERMANS worldwide

Number of holiday trips of five days or more 2023



65.0 million

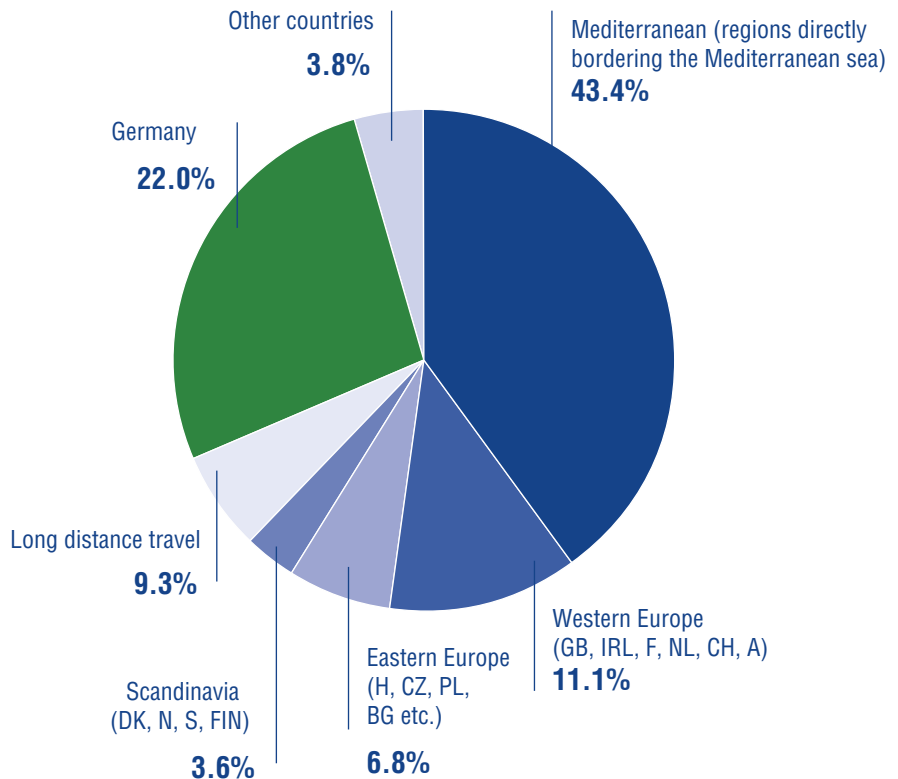
long holiday trips of the
Germans

78.0%

thereof abroad

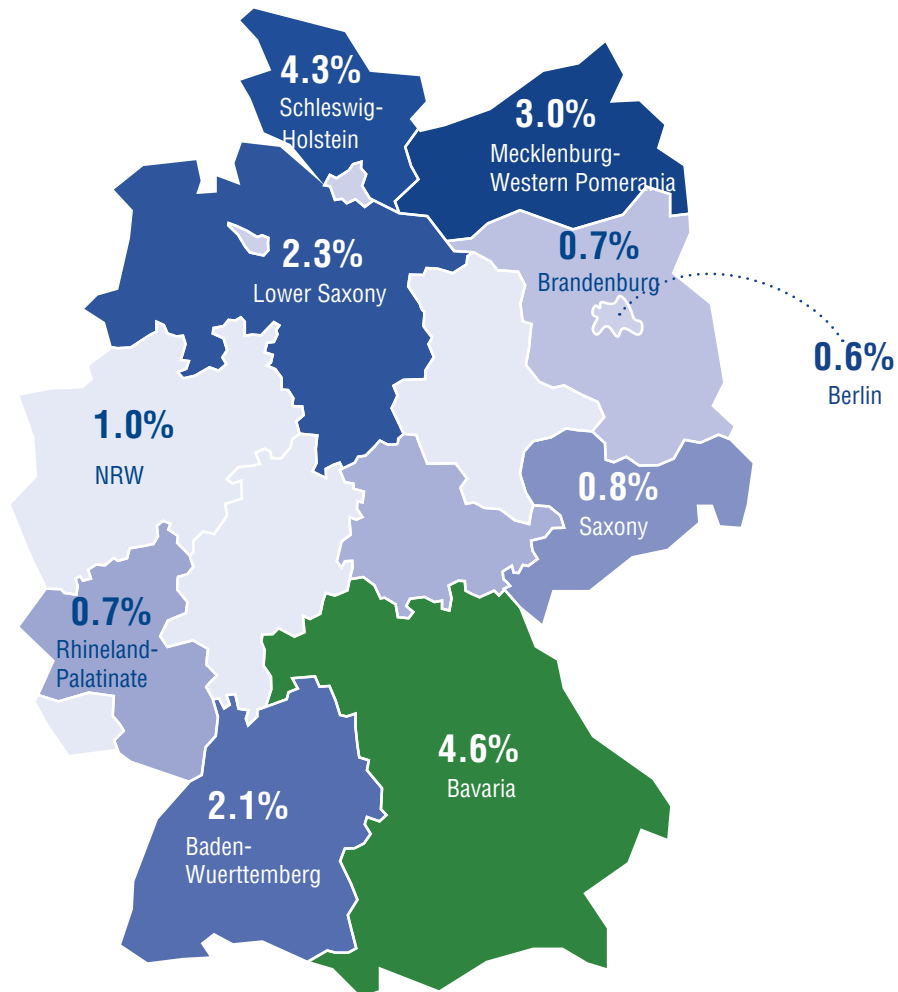
22.0%

thereof Germany



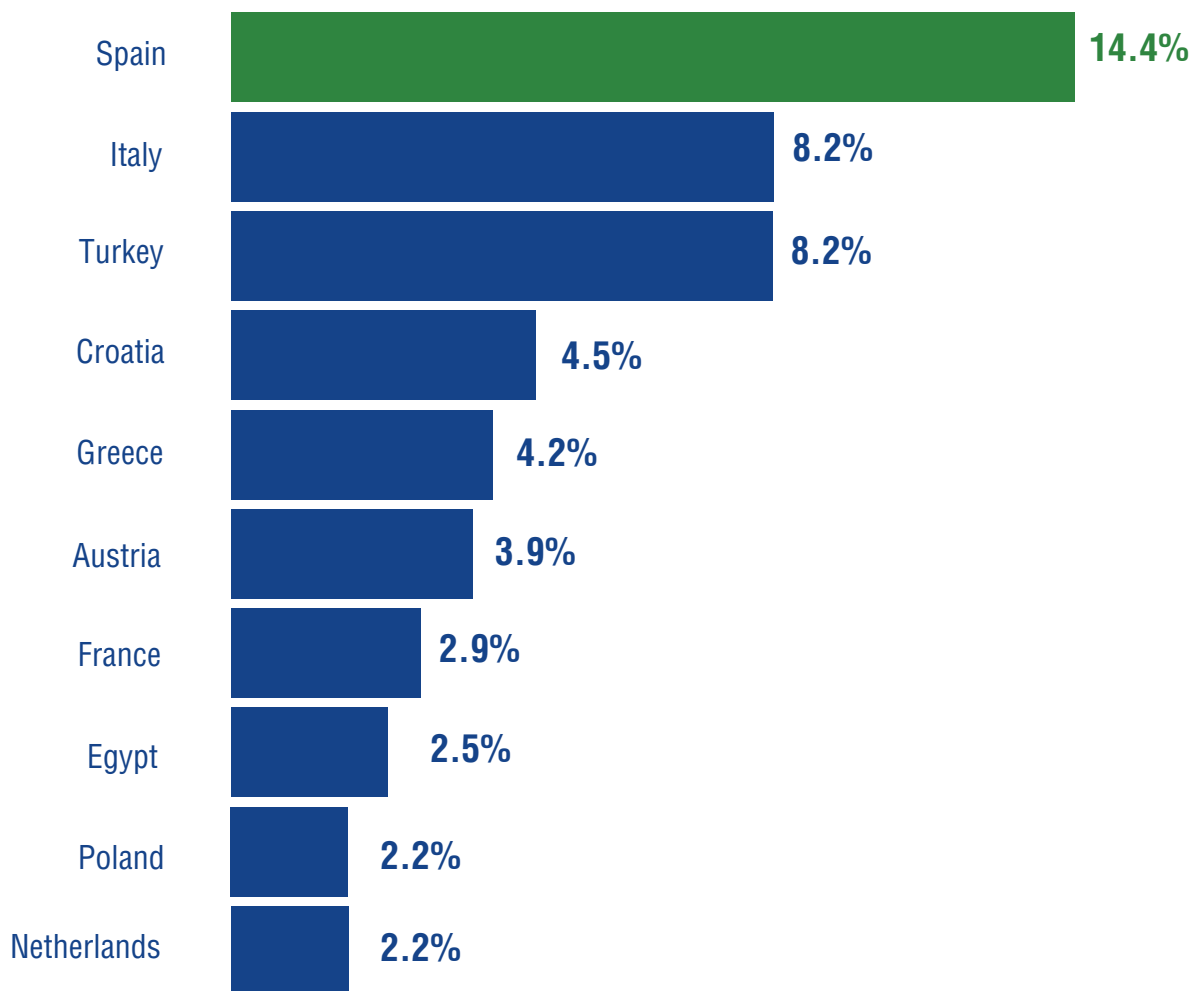
The 10 most popular DOMESTIC DESTINATIONS within Germany

Share of all holiday trips of five days or more 2023



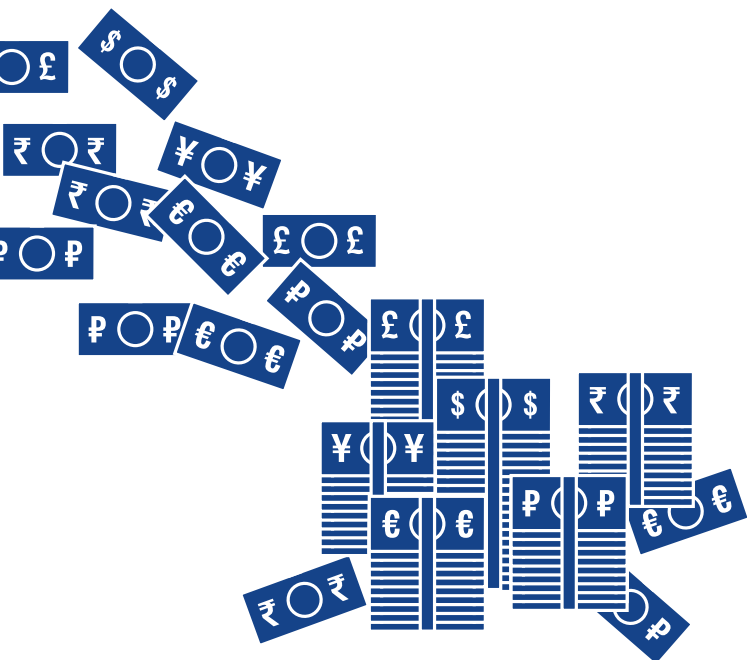
The 10 most popular **FOREIGN DESTINATIONS** for Germans

Share of all holiday trips of five days or more 2023



TRAVEL INCOME AND TRAVEL EXPENSES

of Germans



Income

33.8 billion €

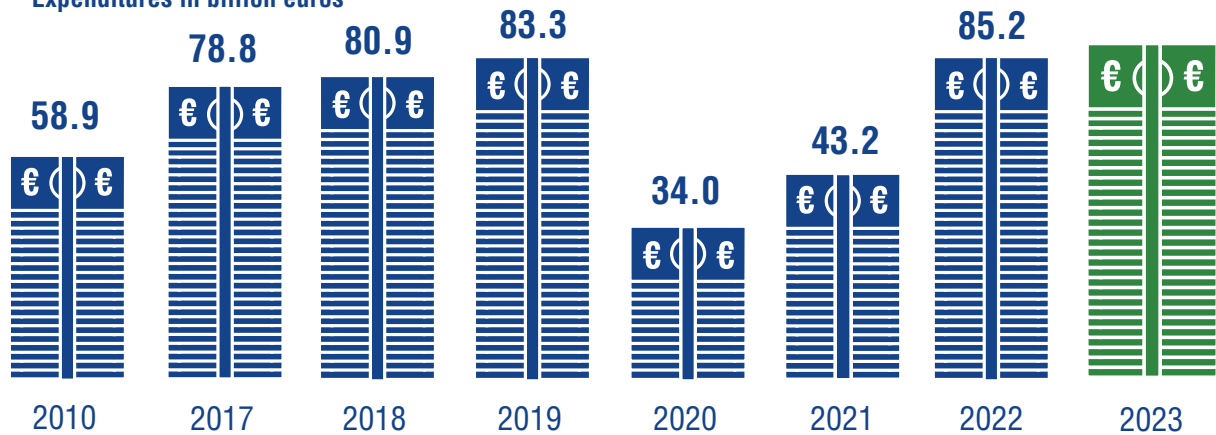


Expenses

95.9 billion €

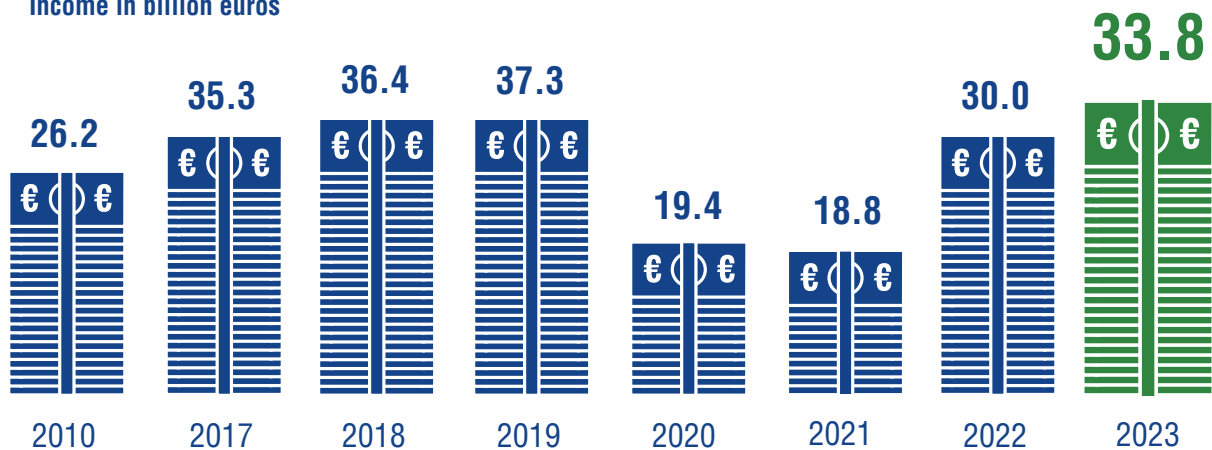
Expenditures by Germans on their trips abroad

Expenditures in billion euros



Germany's income from international travel

Income in billion euros



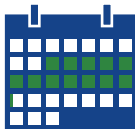
The AVERAGE DURATION of main holiday trips

Ø length of stay in days (main holiday trips)

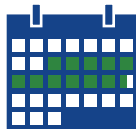


13.3 days

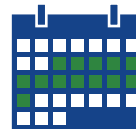
was the average duration
of travel in 2023.



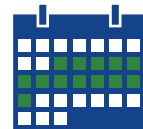
13.0
2022



12.2
2021



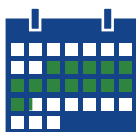
11.6
2020



13.0
2019



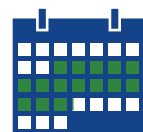
13.0
2018



13.2
2010



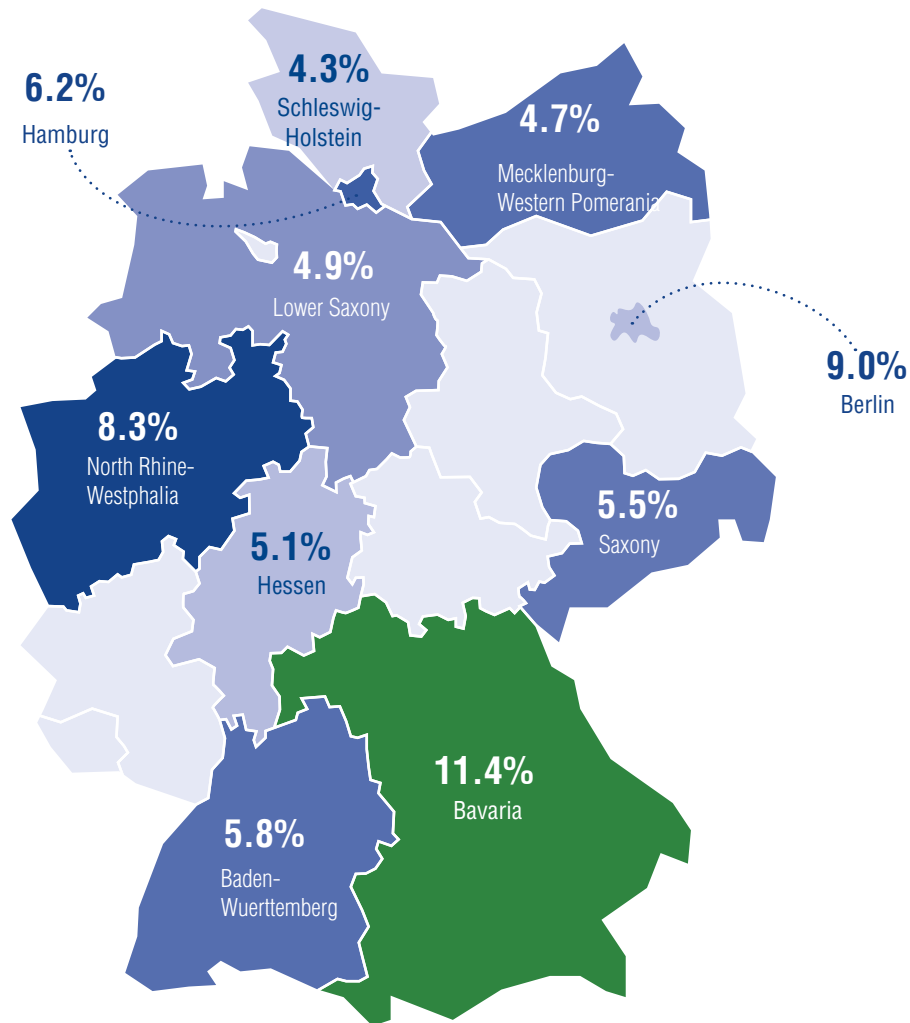
13.4
2008



15.1
1998

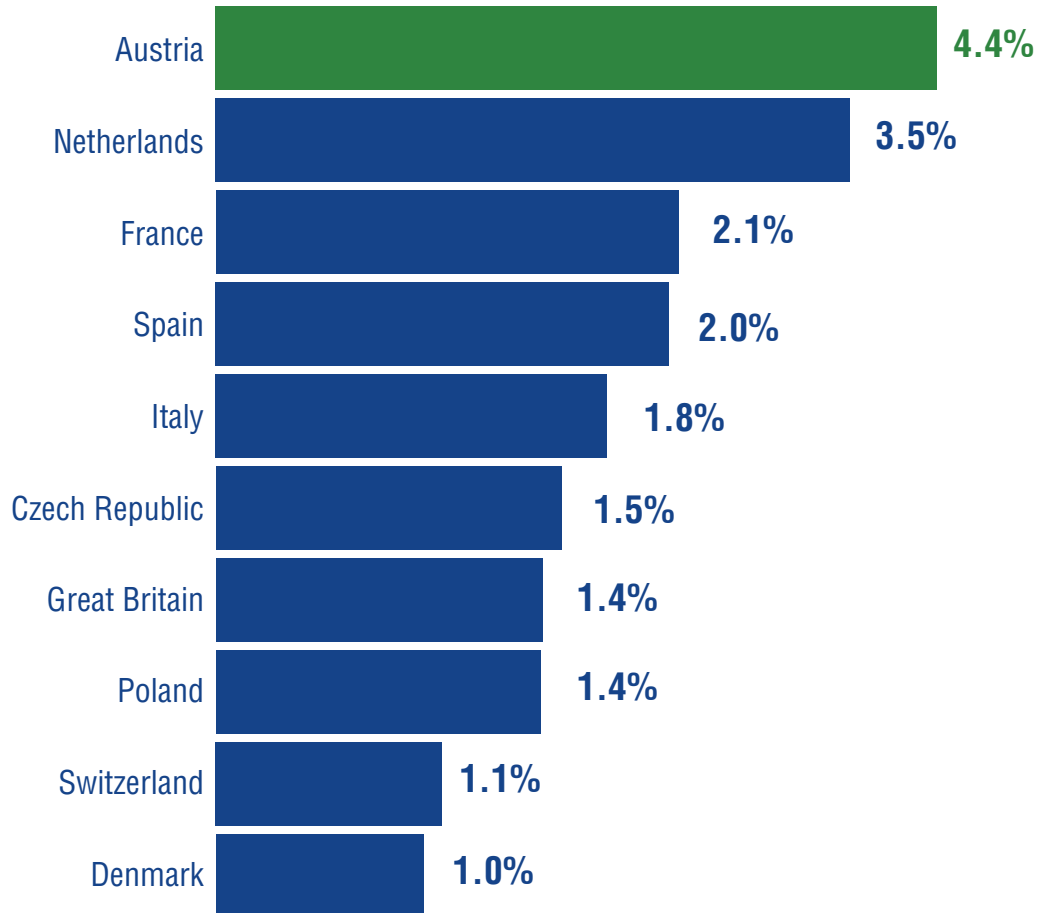
The 10 most popular SHORT TRIP DESTINATIONS of Germans in Germany

Share of all short breaks, travel duration two to four days in 2023



The 10 most popular **SHORT TRIP DESTINATIONS** of Germans abroad

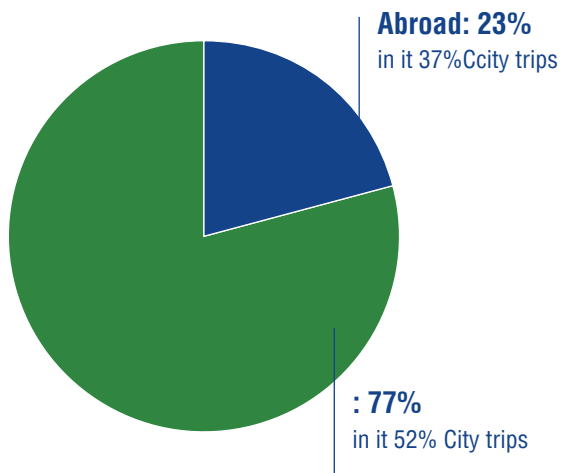
Share of all short breaks, travel duration two to four days in 2023



SHORT BREAKS IN GERMANY AND ABROAD

by Germans

Travel duration two to four days in 2023



74.1 million

total trips

Day trips made by Germans 2023

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

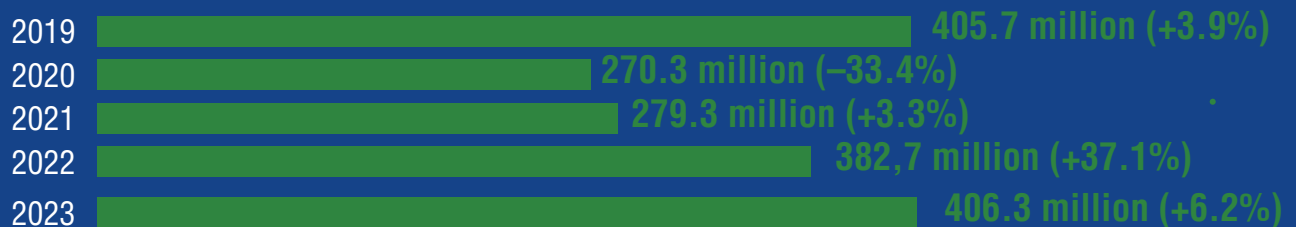


All OVERNIGHT STAYS

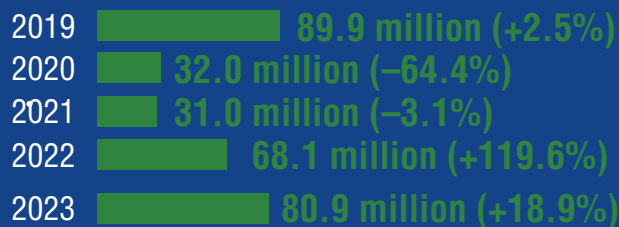
in Germany

Tourism in Germany continues to recover from the declines during the coronavirus restrictions. The total number of overnight stays in Germany rose by 8.1% to 487.2 million.

Overnight stays of German visitors



Overnight stays by foreign visitors



End 2022:



27,395
Businesses



1.86 million
Beds



105€
Ø Room rate

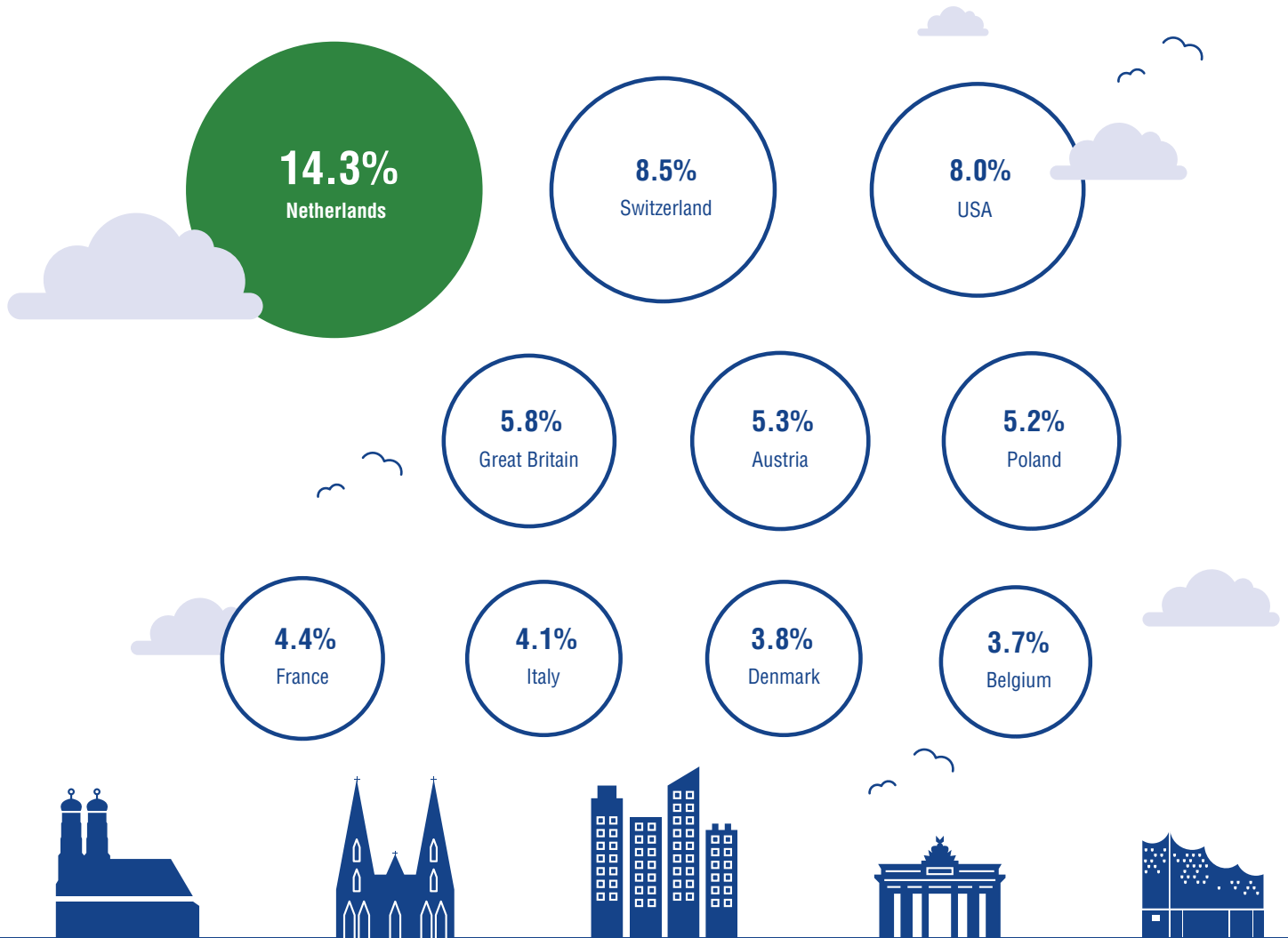


57.5%
Ø Room
occupancy

Sources: Statistisches Bundesamt, Hotelverband Deutschland (IHA)

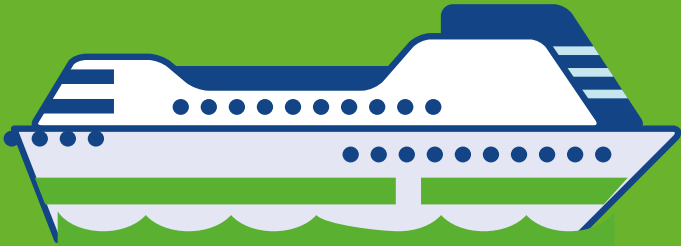
The most important SOURCE MARKETS for Germany

Share of all overnight stays from abroad 2023



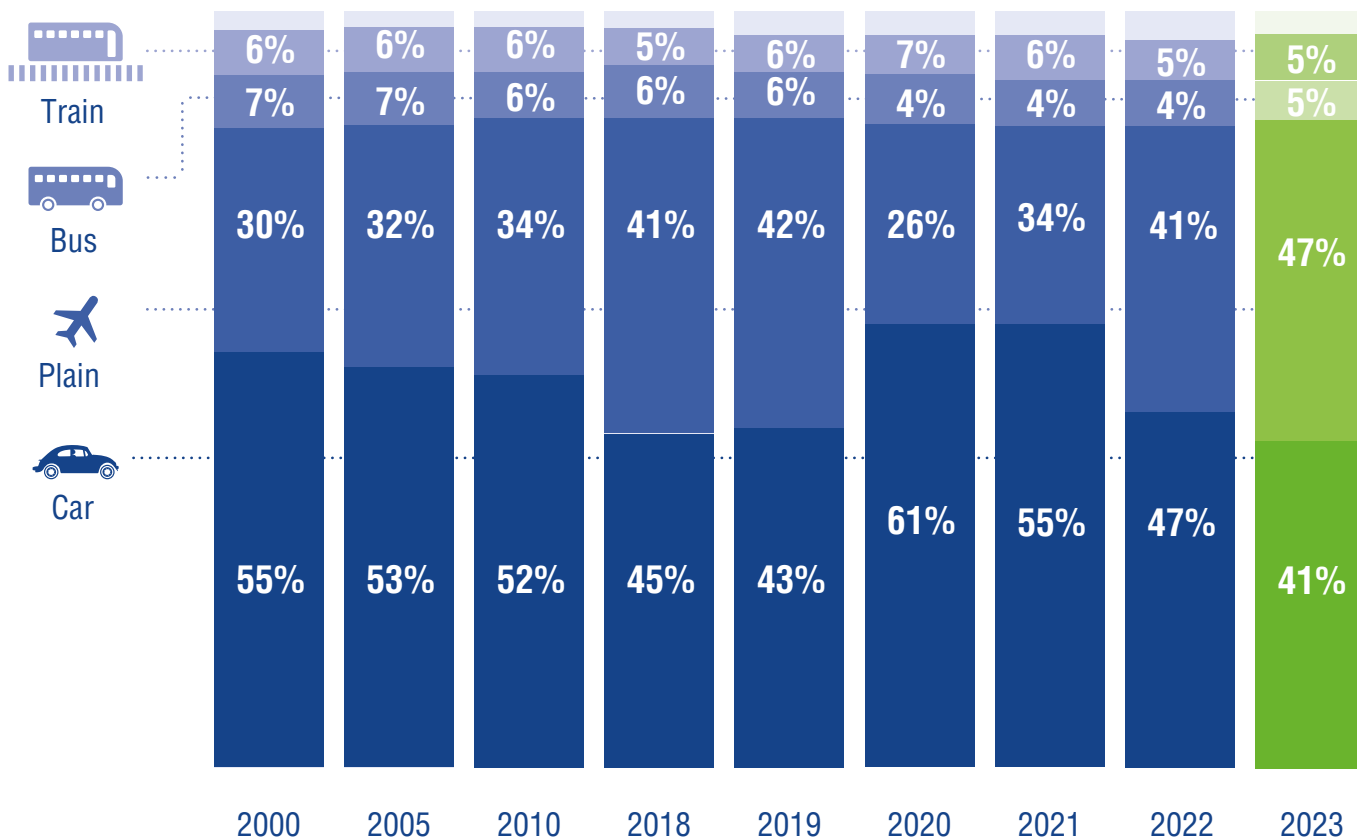


MEANS OF TRANSPORT



The most popular MEANS OF TRANSPORT for holiday trips

German holiday trips of 5 days or more, percentage share

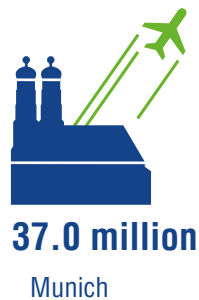
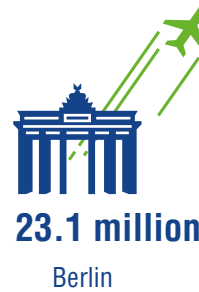
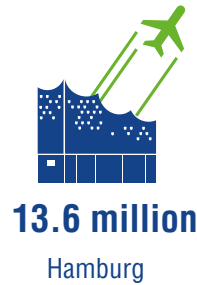
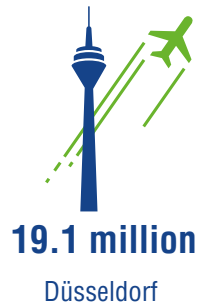


Difference to 100 percent: other means of transport such as ship

Source: Reiseanalyse 2024

The 5 biggest Airports in Germany

Number of passengers in millions in 2023



PASSENGER VOLUME

in aviation

Following the sharp declines due to the coronavirus measures, air traffic continued to recover in 2023.

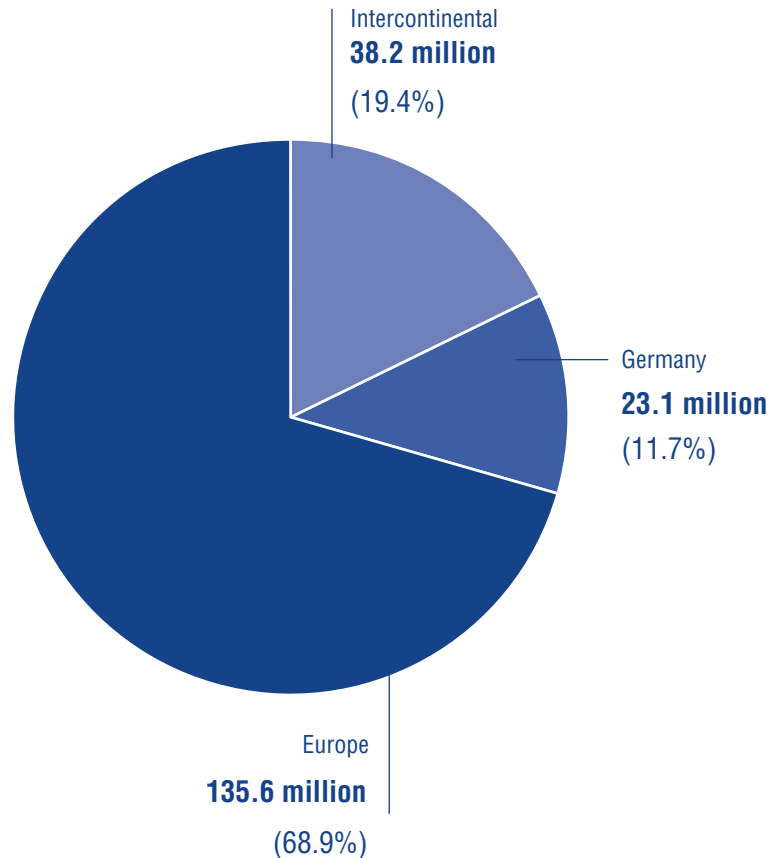
A total of **196.9 million passengers** took off and landed at German airports (2022: 165.1 million).

This is an increase of **18.5%** compared to 2022.



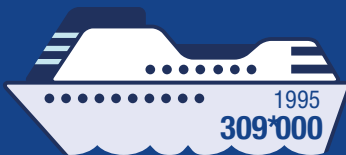
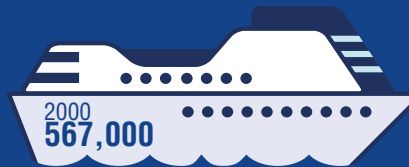
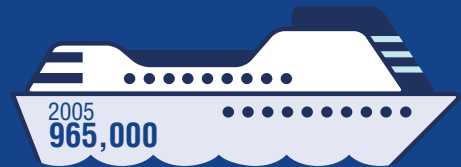
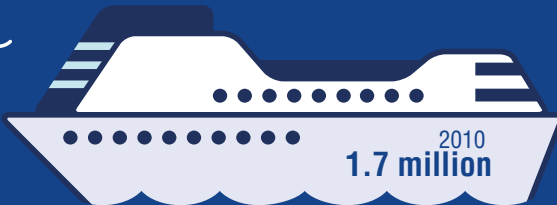
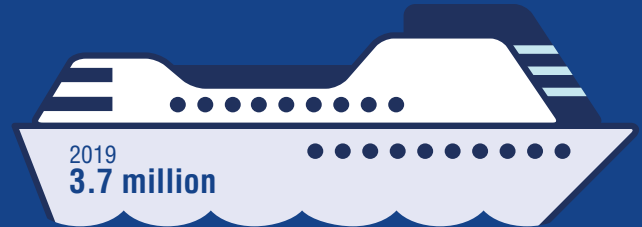
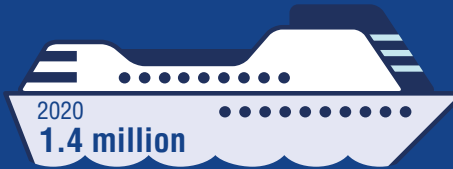
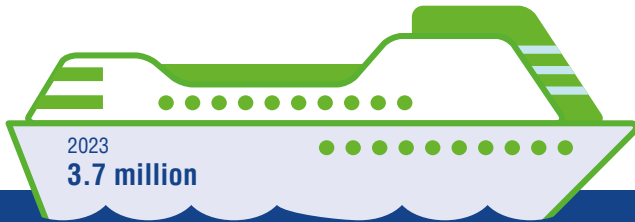
**196.9
million**

Total air passengers
(excluding transit)



CRUISES

Passengers on rivers and oceans



The Cruise Market Germany

Ocean Cruises

	2019	2021	2022	2023
Number of passengers	2,943,400	736,600	2,526,100	2,961,900
Expenses in advance, in million euros	5,121.0	907.9	3,423.8	4,649.6
Expenses in advance, per person/trip	1,740 €	1,233 €	1,355 €	1,570 €
Ø Travel time	10.9 nights	8.8 nights	9.8 nights	10.1 nights

River Cruises

	2019	2021	2022	2023
Number of passengers	727,400	209,400	644,800	700,000
Expenses in advance, in million euros	853.2	241.2	685.3	829.1
Expenses in advance, per person/trip	1,173 €	1,152 €	1,063 €	1,184 €
Ø Travel time	8.3 nights	7.4 nights	7.6 nights	7.4 nights



Source: GfK Mobilitätsmonitor

Changed survey methodology, therefore these data are only comparable to a limited extent with the data from the publications of previous years.

BUSINESS TRAVEL MARKET



Development in the German **BUSINESS TRAVEL MARKET** 2022

	2019	2021	2022
Number	195.4 million	41.4 million	75.1 million
Average costs	312 €	334 €	371 €
Costs per person / day	162 €	147 €	154 €
Total overnight stays Business Travel	74.3 million	24.1 million	47.6 million
Total costs	55.3 billion €	13.4 billion €	26.9 billion €
Thereof companies with 10-500 employees	42.3 billion €	10.2 billion €	21.0 billion €
Thereof companies with >500 employees	13.0 billion €	3.2 billion €	5.9 billion €



In 2022, there were a total of **75.1 million** business trips by employees of companies based in Germany.

Imprint

YOUR CONTACTS

at DRV

As the central association, the DRV represents the travel industry in Germany and is primarily committed to the interests of tour operators and travel agents. Behind the DRV is a significant economic force: its members generate the majority of sales in the tour operator and travel agent market. Several thousand member companies, including numerous tourism service providers, make the DRV a strong community that bundles the diverse interests.



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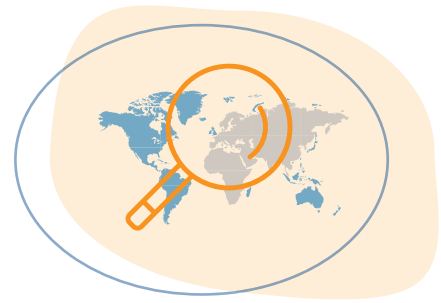
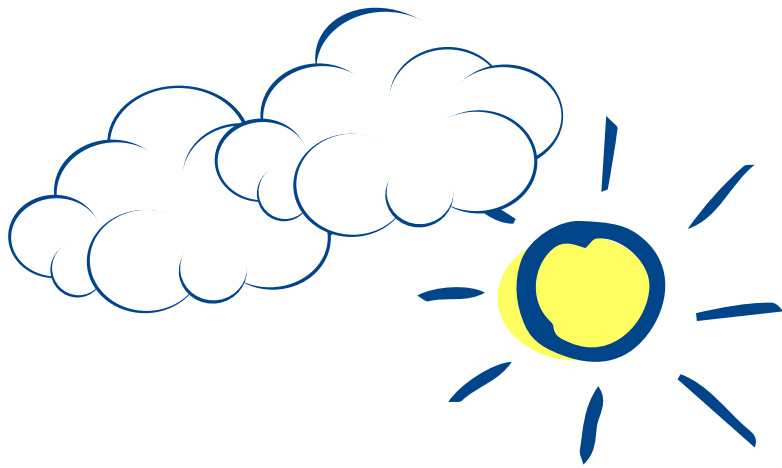
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