



# THE GERMAN TRAVEL MARKET

Facts and figures 2022

Status: March 2023

# The German Travel Market

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2022

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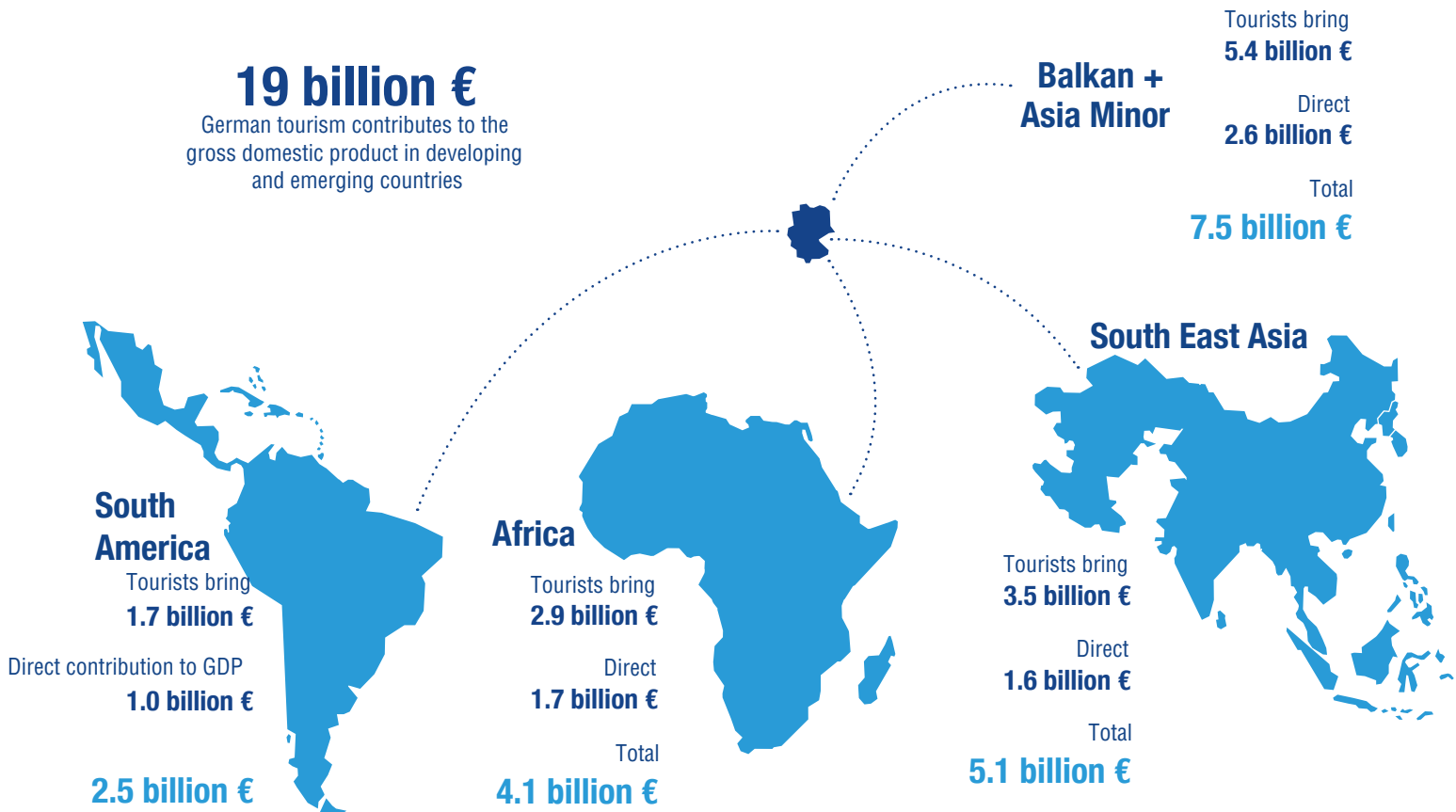
### BUSINESS TRAVEL MARKET

Development in the German business travel market 2021

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# Contribution of German tourists to ECONOMIC DEVELOPMENT in developing and emerging countries

For example: German tourists spend 1.7 billion euros in Central and South America/ Caribbean. This leads to a direct contribution to the GDP of one billion euros in this region. The indirect and induced effects contribute another 1.5 billion euros, so that tourism as a whole makes a contribution of 2.5 billion euros.



# A GROWTH INDUSTRY OVERCOMES THE PANDEMIC

## Tourism on its way back

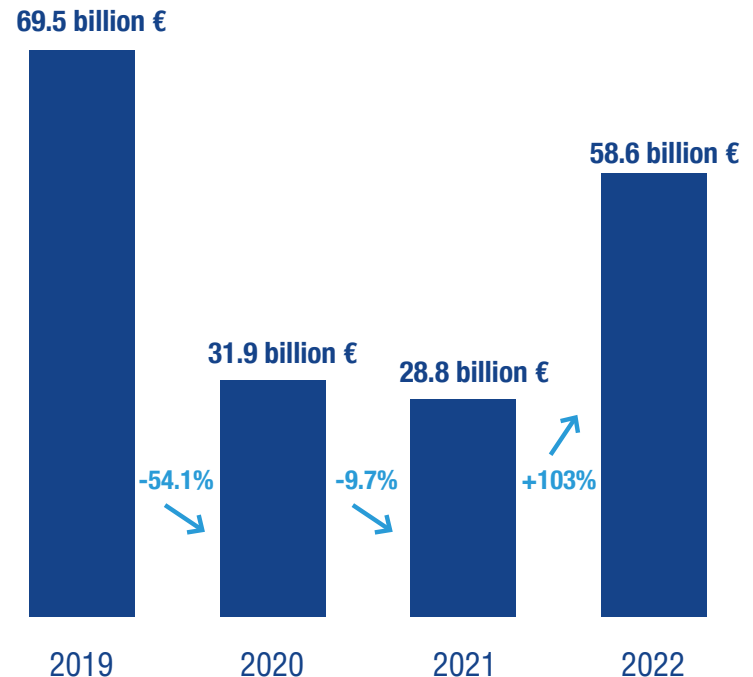
In the years before the Corona pandemic, tourism had only one path: growth. Year after year, the travel expenditure (services booked before departure) of Germans increased significantly - until most recently in 2019 to **69.5 billion euros**. Tourism was considered a growth sector of the German economy.

The turnaround came in the Corona year 2020 - travel spend fell massively with dramatic consequences. Support of politics have helped to maintain the industry's strong infrastructure and safeguard the almost **three million jobs** in the tourism industry.

In 2022, the Germans' desire to travel came back - travel spending has doubled in comparison to the previous year to 58.6 billion euros. An extremely positive development, despite the war in Ukraine and high inflation. The decline in tourism during Corona also had serious consequences in many destinations, as in the pre-Corona years, Germans were among the biggest foreign spenders in international travel.

With the return of the tourists, the situation in the destinations is also becoming better - tourism as a job engine is starting up again.

### Travel spending is on the rise again



# The ECONOMIC IMPORTANCE

## of the tourism industry at a glance



**67.1 million**

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



**more than 50%**

of the tour operator trips the  
Germans book via travel agency



**2,300**

tour operators  
in Germany



**52.9 million**

persons on holiday trips  
of 5 days or more (previous  
year: 47.8 million)



**1.3**

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



**74.9%**

Travel intensity  
(percentage of  
population travelling)



**2.9 million**

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



**450.8 million**

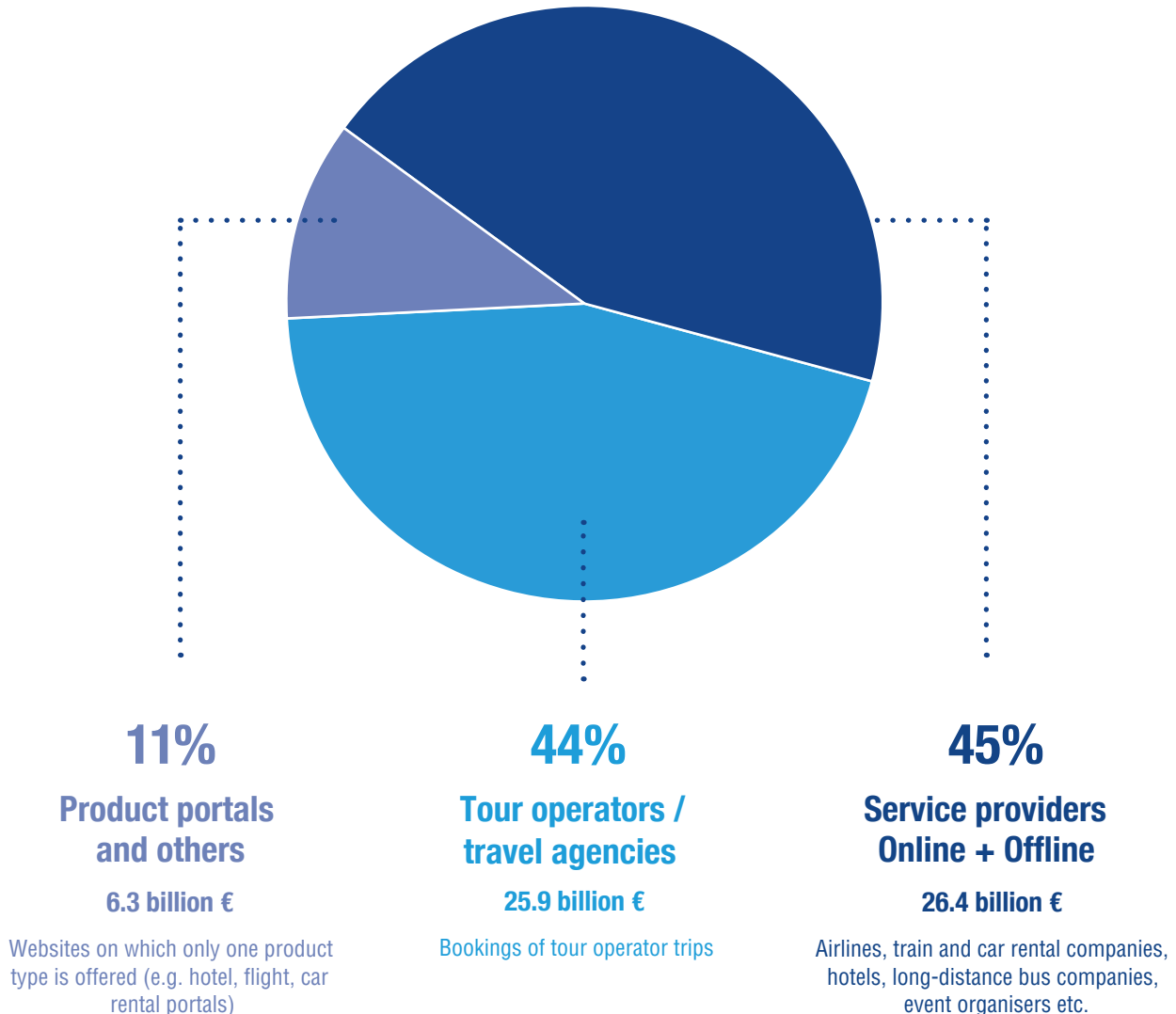
overnight stays by residents  
and non-residents in Germany  
in 2022 (+45.3%)



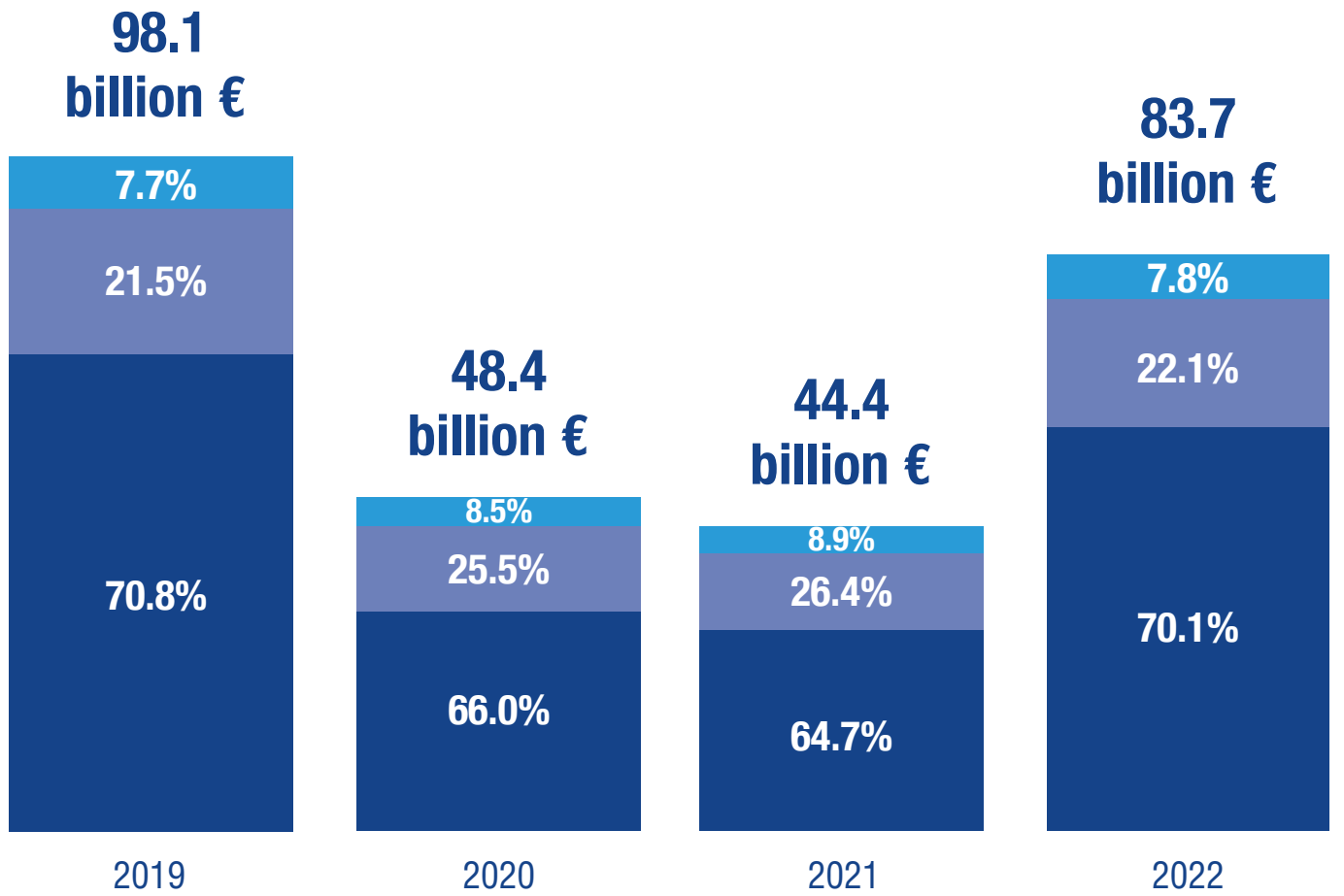
**≈ 27%**

of the journeys of German  
citizens are spent in Germany  
in 2022.

# Market structure in the GERMAN TOURISM MARKET 2022



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 AND TRAVEL AGENCY SALES in Germany

## Tour Operators

**35.2 billion €**  
Total turnover  
2018



**35.4 billion €**  
Total turnover  
2019



**12.5 billion €**  
Total turnover  
2020



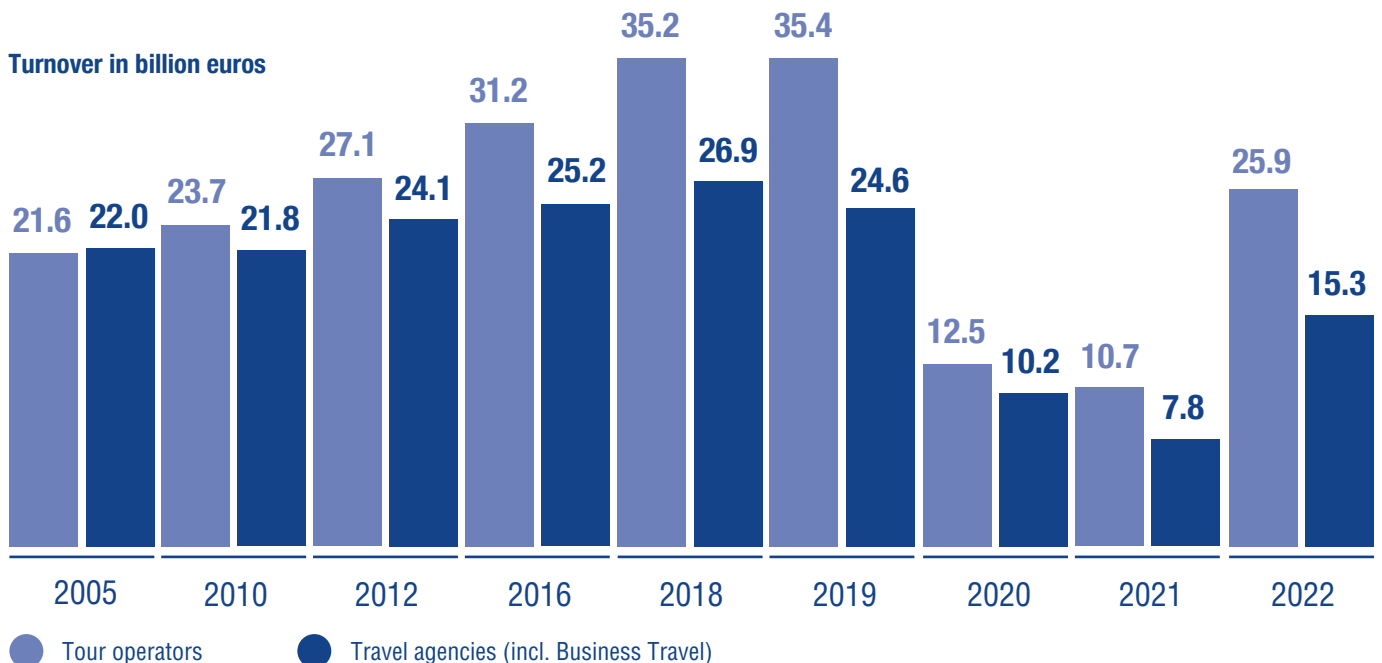
**10.7 billion €**  
Total turnover  
2021



**25.9 billion €**  
Total turnover  
2022

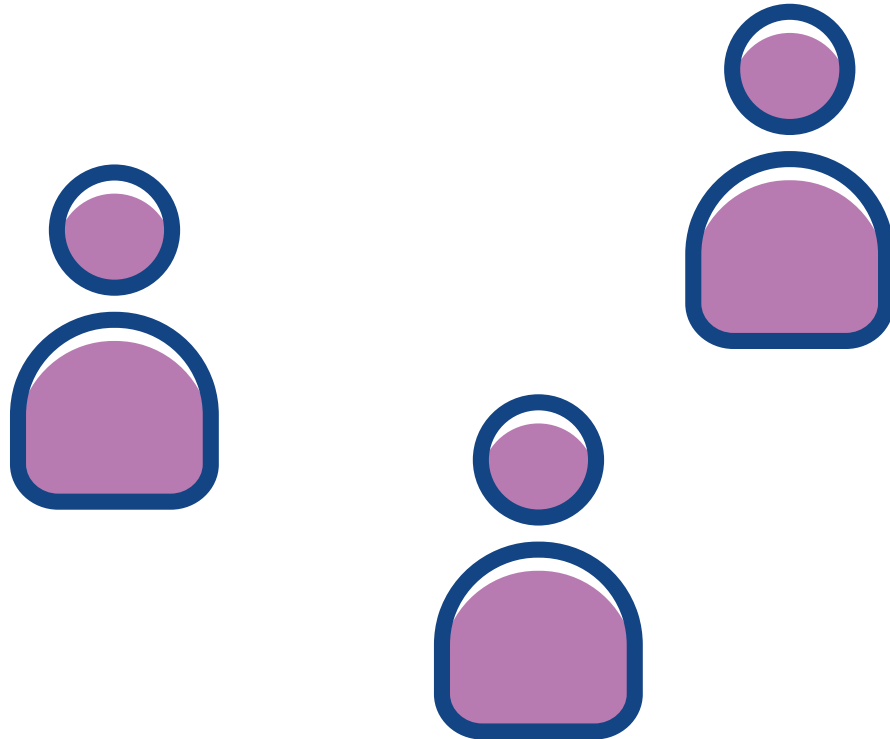


## Turnover in billion euros



## Employees of **TRAVEL AGENCIES AND TOUR OPERATORS**

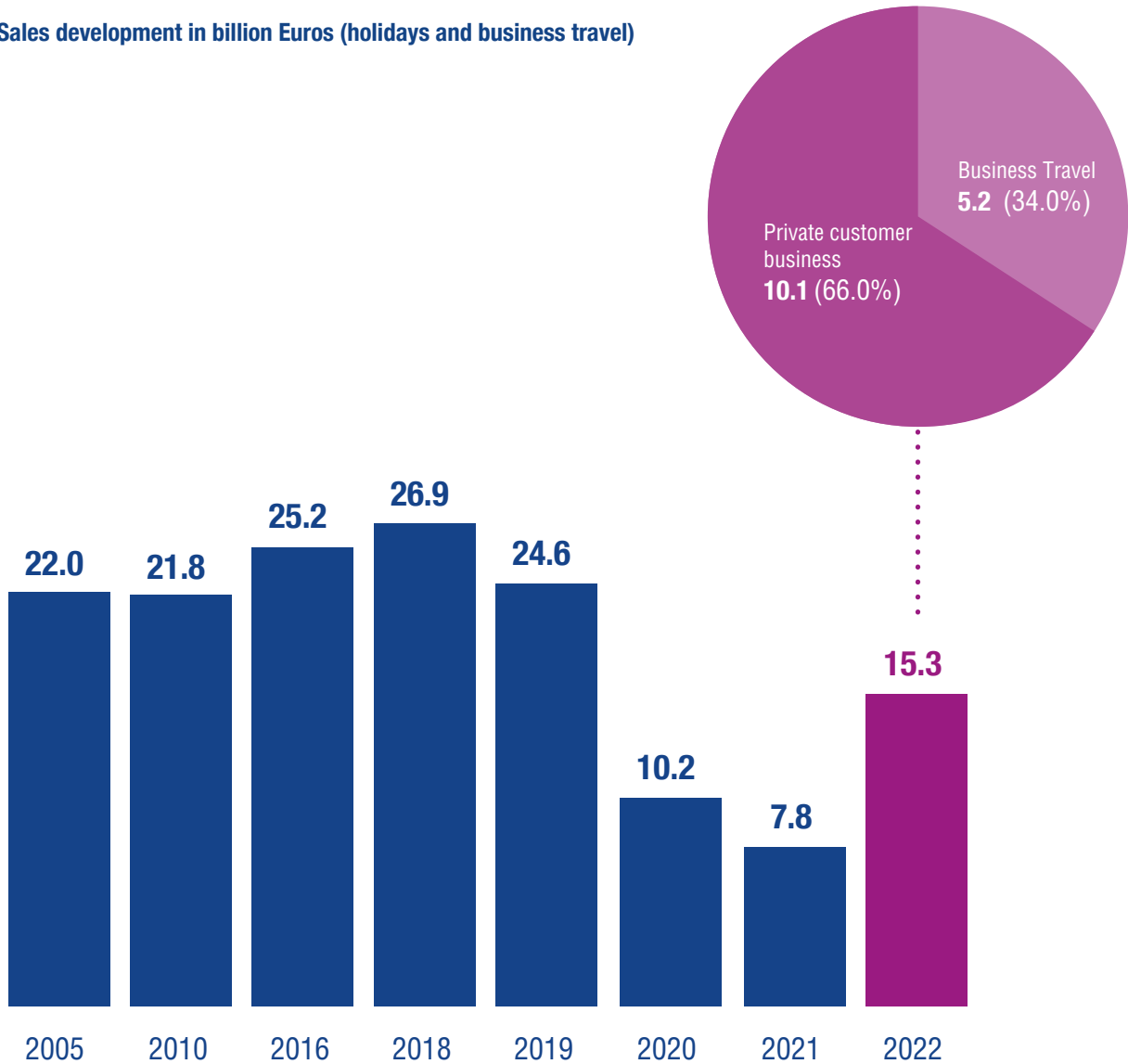
At the end of March 2022 travel agencies and tour operators employed 52,444 persons (previous year: 65,760)



# TRAVEL AGENCIES

make a difference

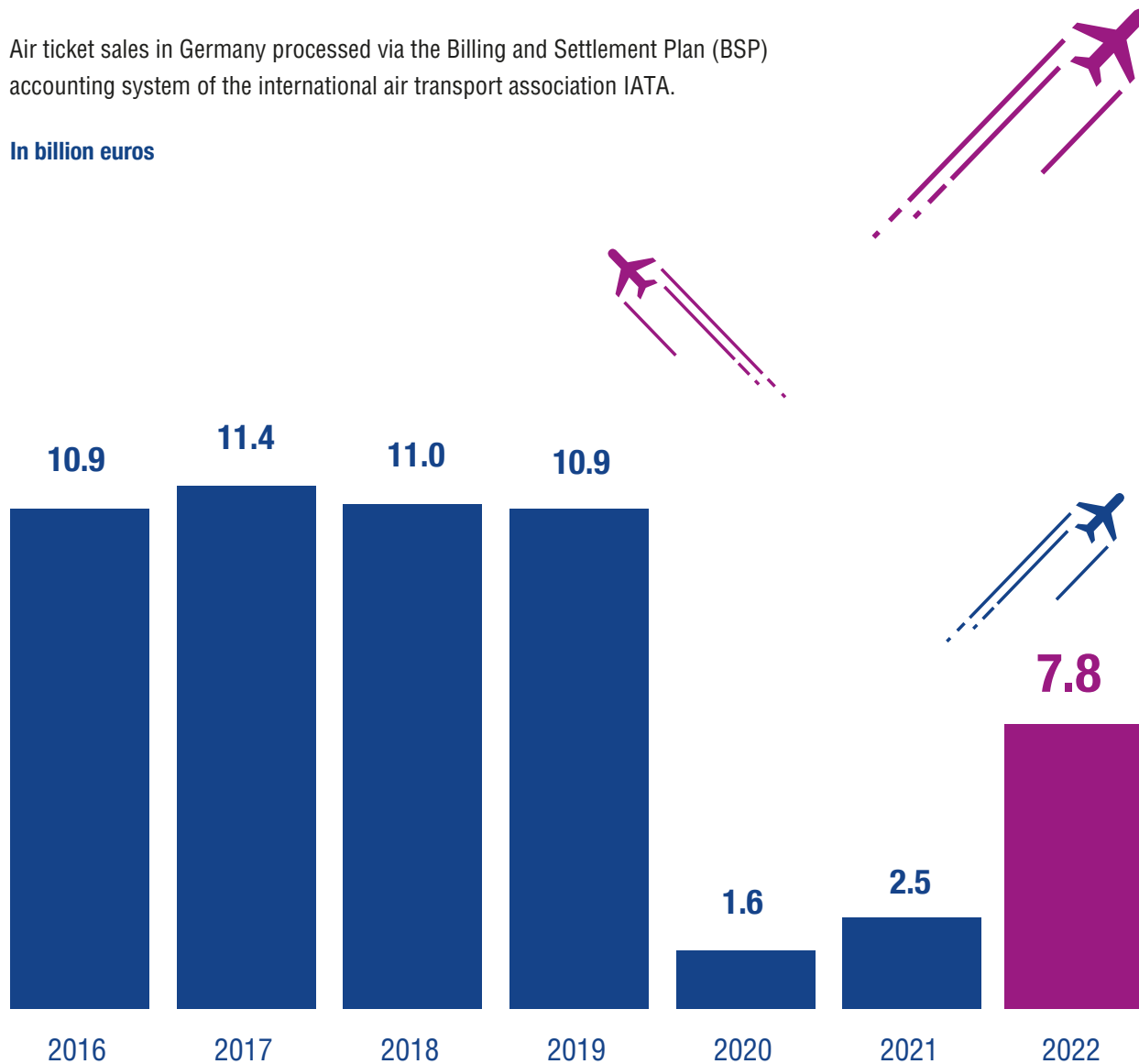
Sales development in billion Euros (holidays and business travel)



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

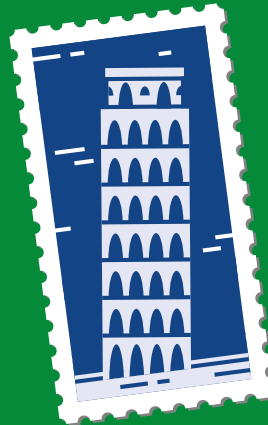
Air ticket sales in Germany processed via the Billing and Settlement Plan (BSP) accounting system of the international air transport association IATA.

In billion euros



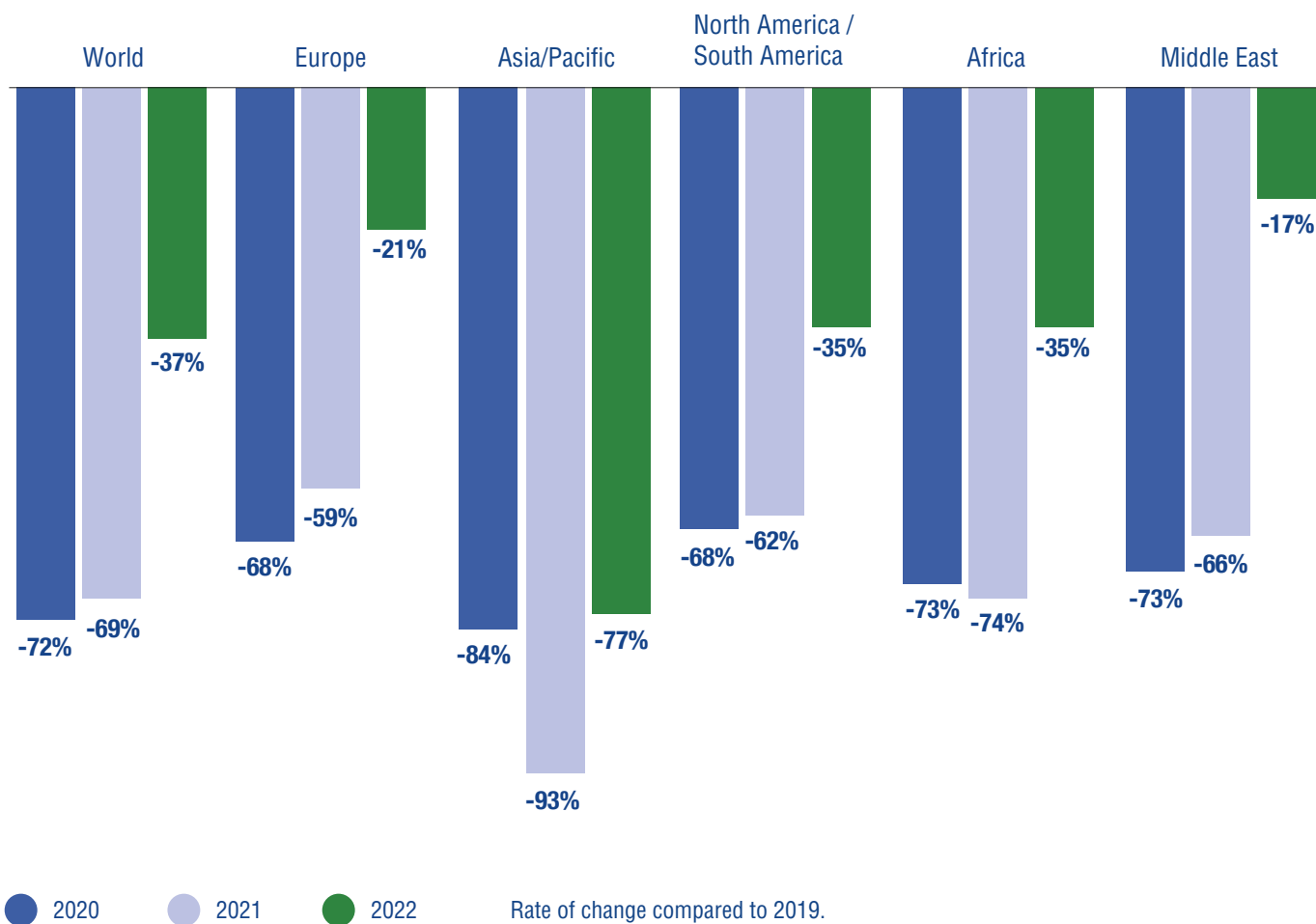


# DESTINATIONS IN GERMANY AND ABROAD



# International TOURIST ARRIVALS

After the dramatic decline in global tourism arrivals in 2020 and the only slight recovery in 2021, there were over 900 million international tourist arrivals in 2022. However, even this figure is still a long way from the 1.5 billion tourists arrivals in 2019.



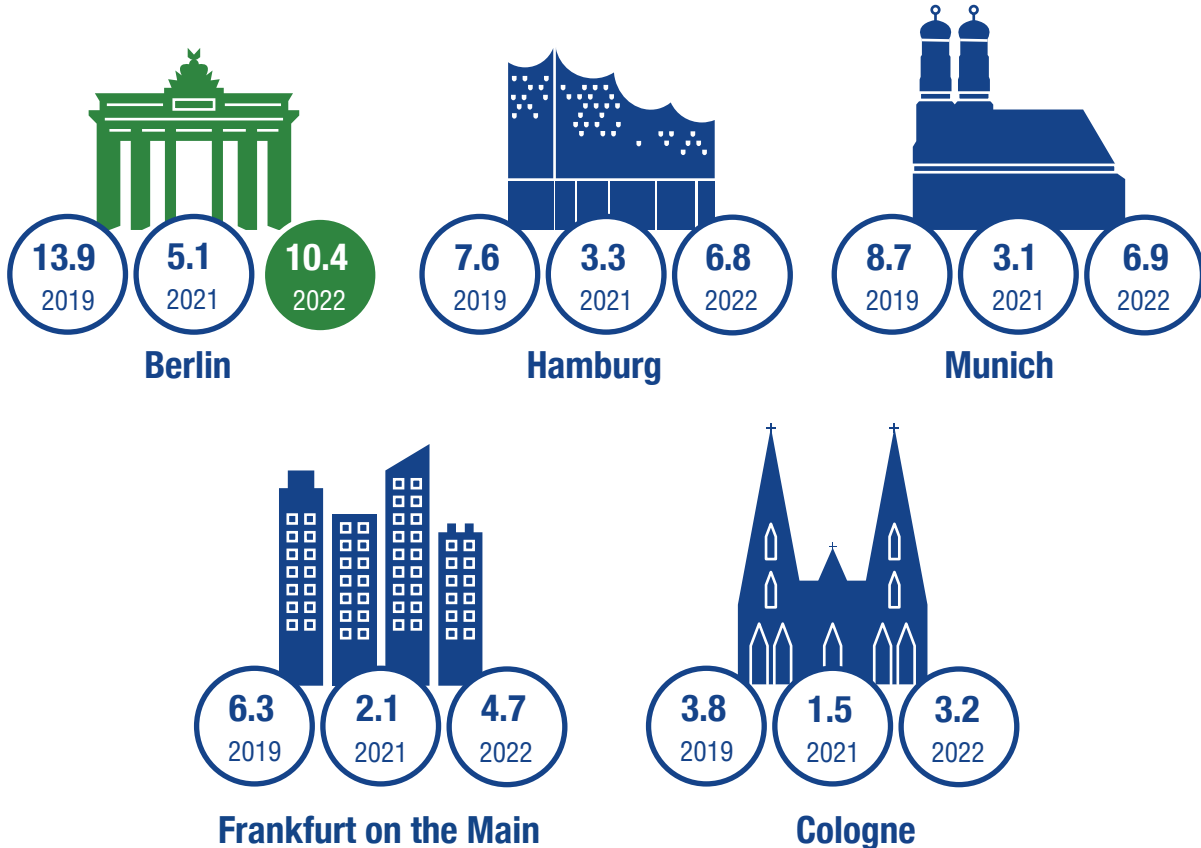
## The 5 most popular

# CITY TRIPS

## in Germany 2022

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 2022



**67.1 million**

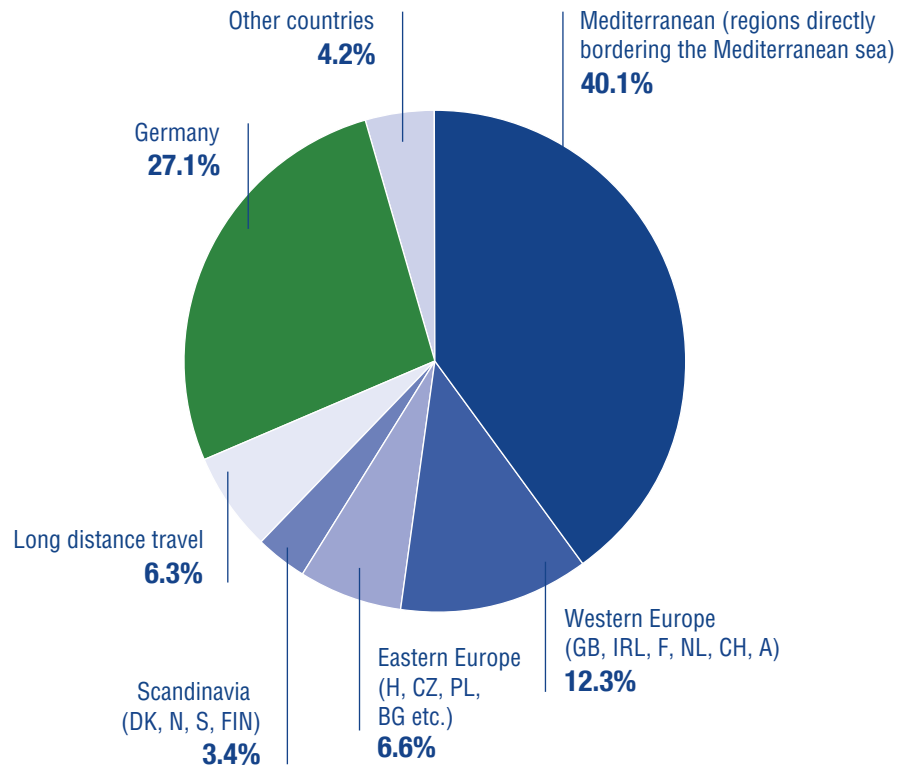
long holiday trips of the  
Germans

**72.9%**

thereof abroad

**27.1%**

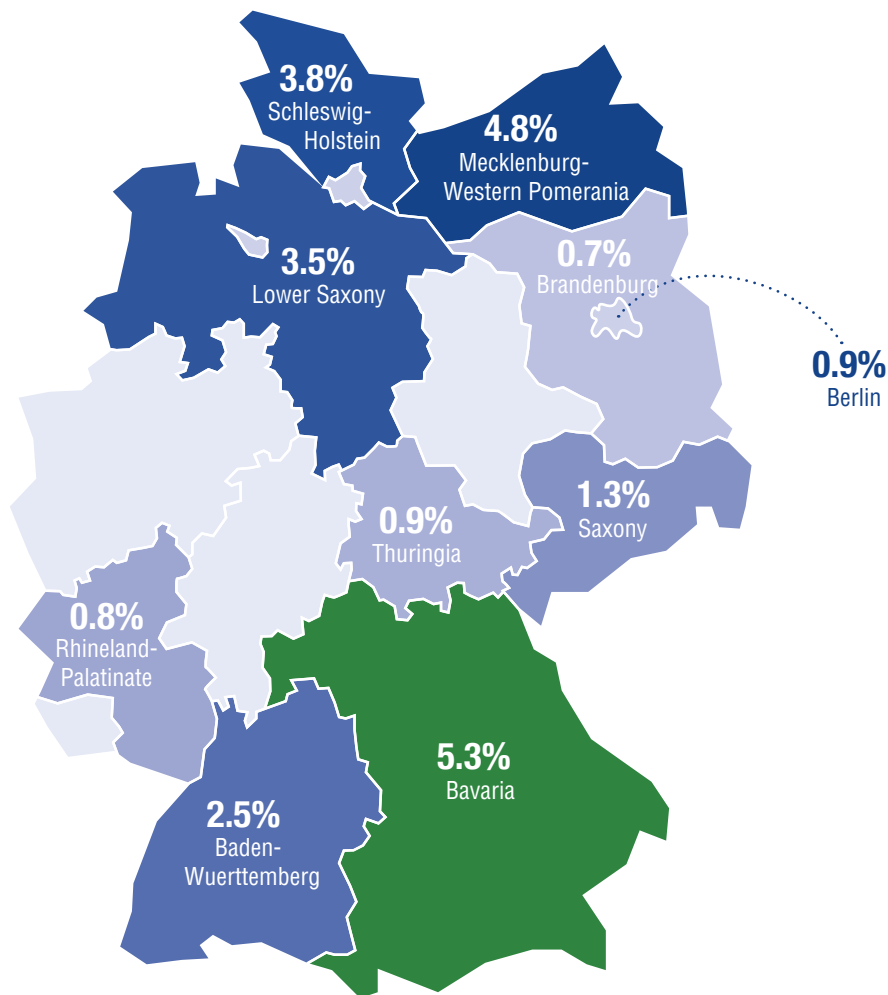
thereof Germany





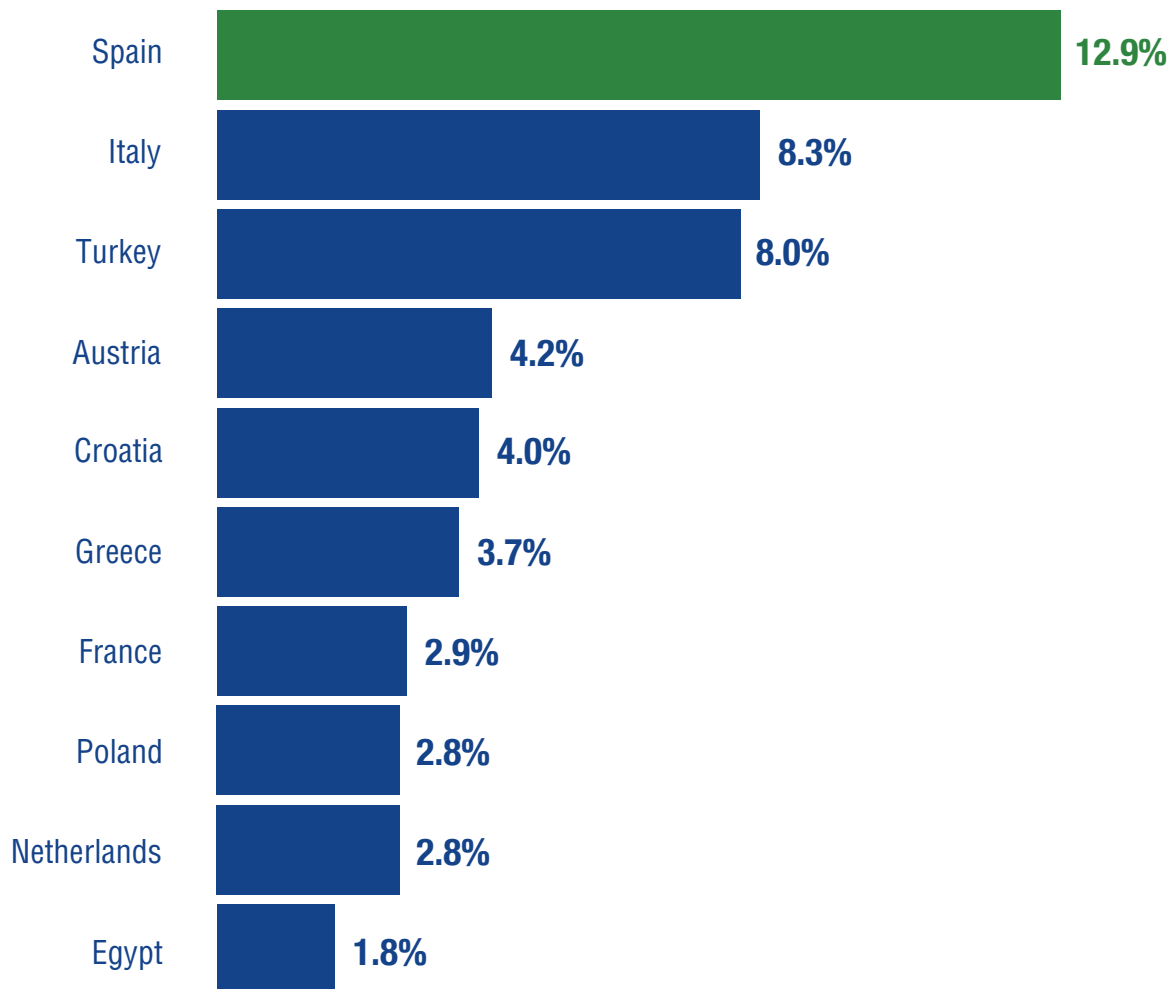
# The 10 most popular DOMESTIC DESTINATIONS within Germany

Share of all holiday trips of five days or more 2022



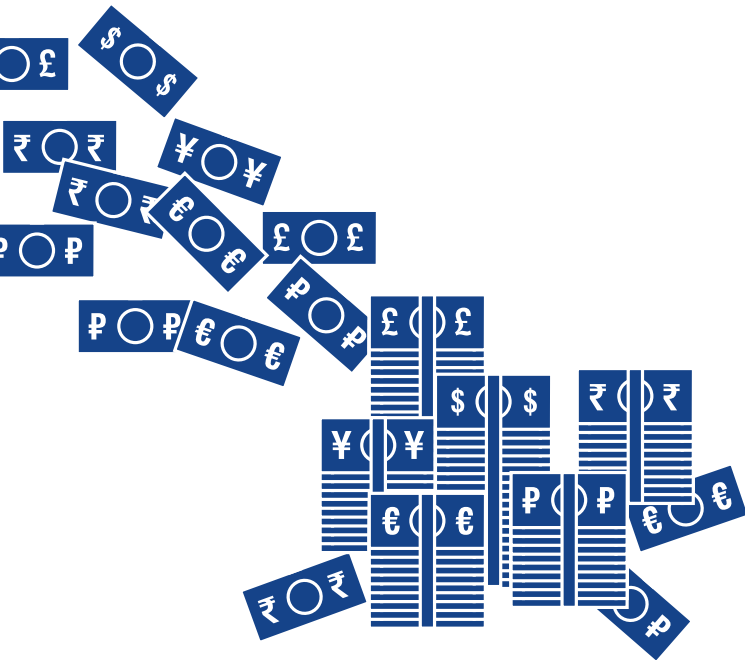
# The 10 most popular **FOREIGN DESTINATIONS** for Germans

Share of all holiday trips of five days or more 2022



# TRAVEL INCOME AND TRAVEL EXPENSES

of Germans



Income

**31.7 billion €**

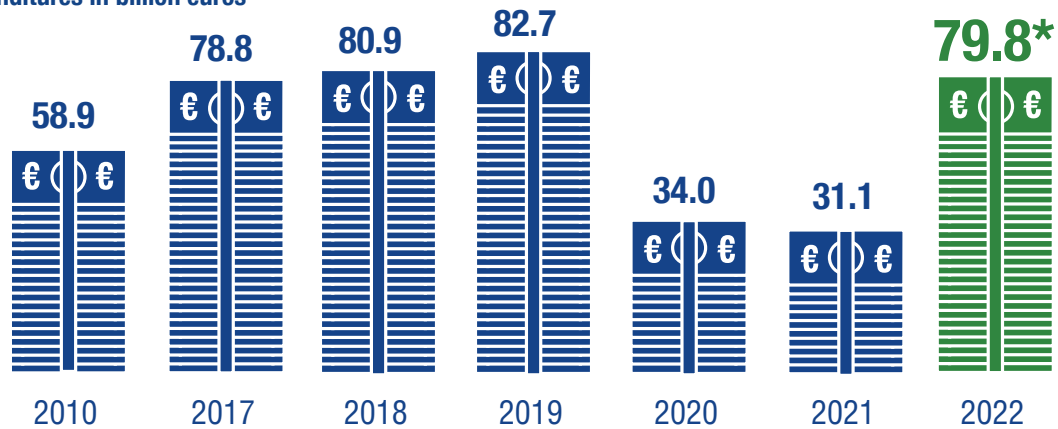


Expenses

**79.8 billion €**

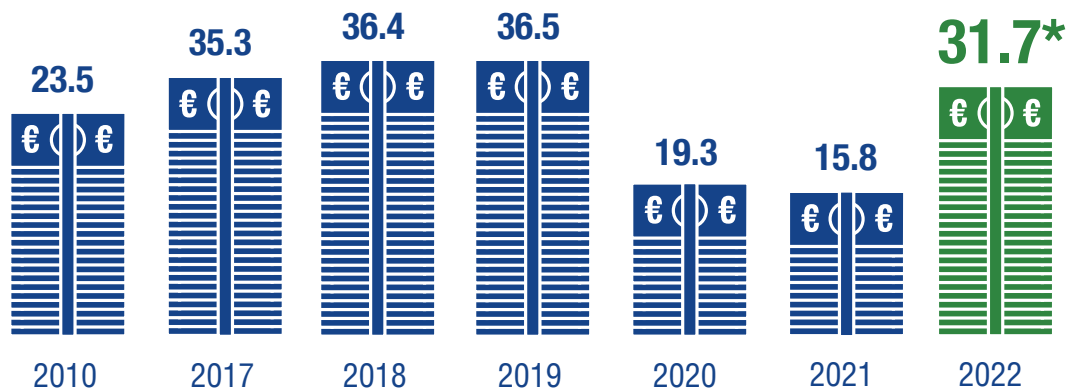
## Expenditures by Germans on their trips abroad

Expenditures in billion euros



## Germany's income from international travel

Income in billion euros



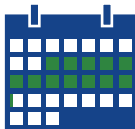
# The **AVERAGE DURATION** of main holiday trips

Ø length of stay in days (main holiday trips)



## 13.0 days

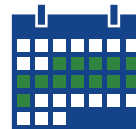
was the average duration  
of travel in 2022.



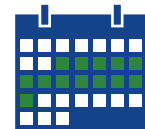
**12.2**  
2021



**11.6**  
2020



**13.0**  
2019



**13.0**  
2018



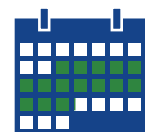
**13.1**  
2017



**13.2**  
2010



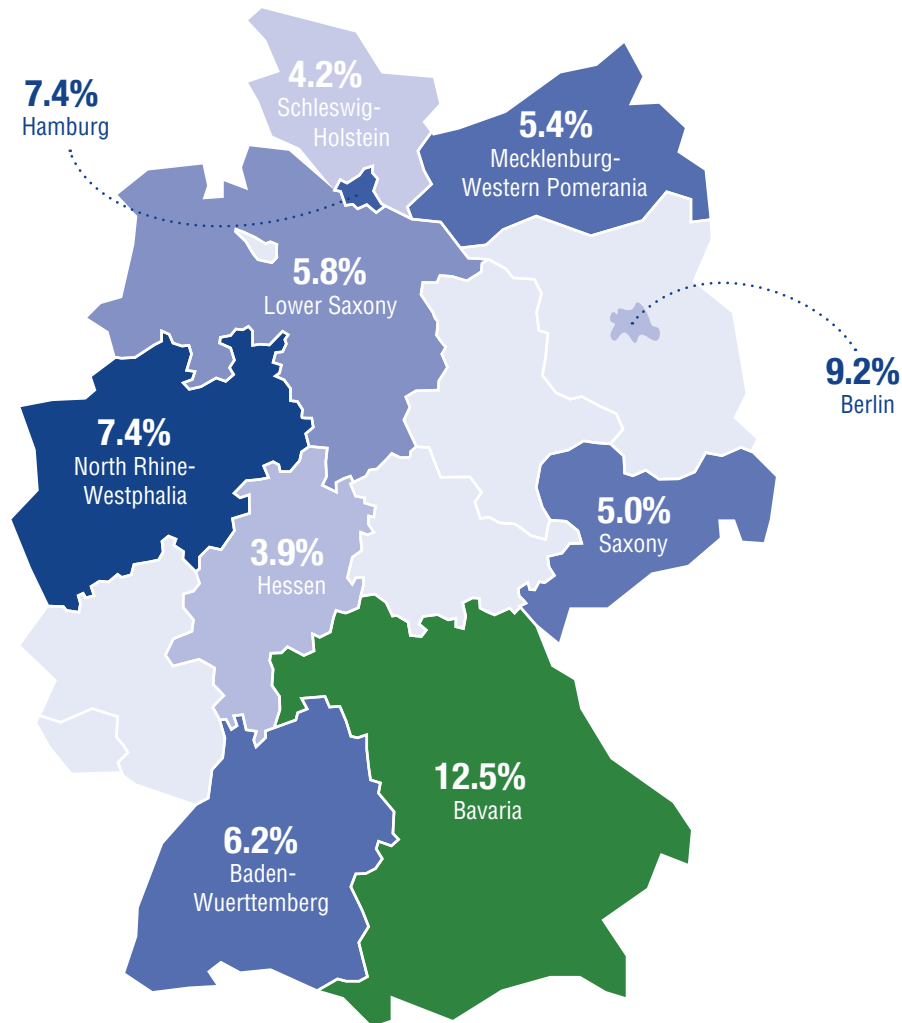
**13.4**  
2008



**15.1**  
1998

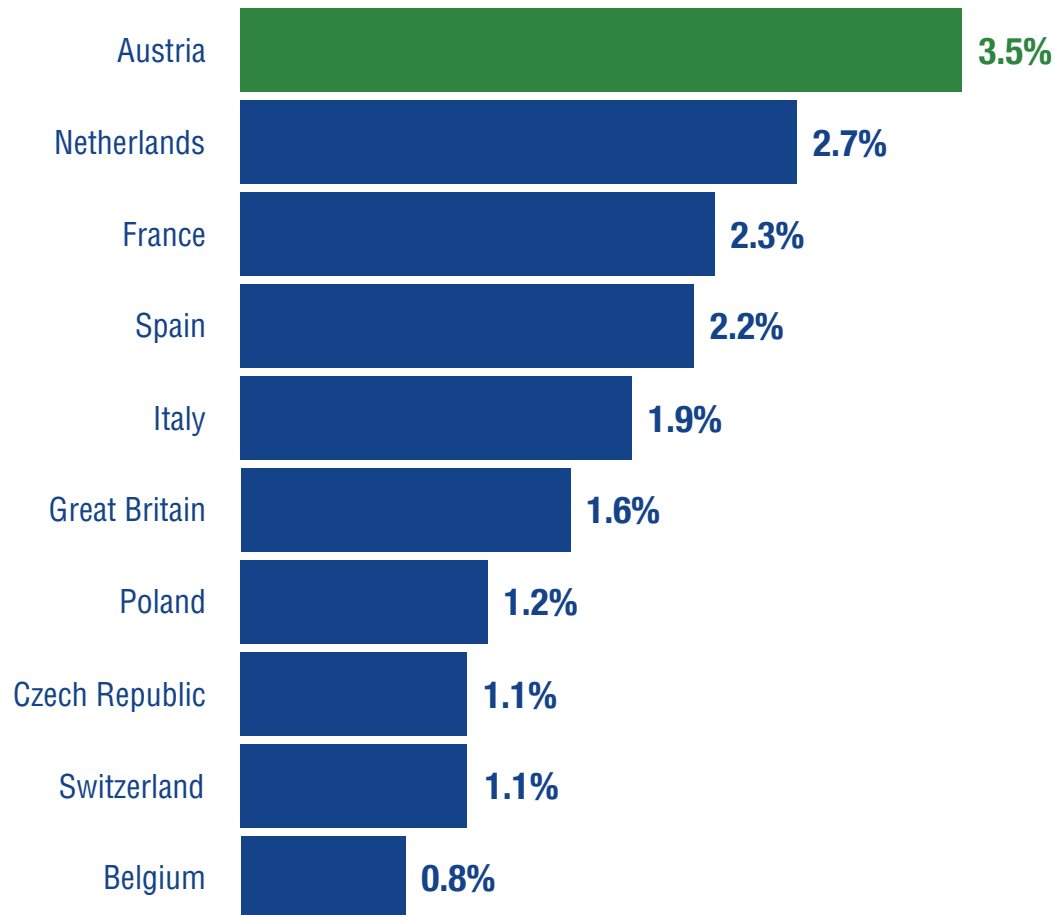
# The 10 most popular SHORT TRIP DESTINATIONS of Germans in Germany

Share of all short breaks, travel duration two to four days in 2022



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

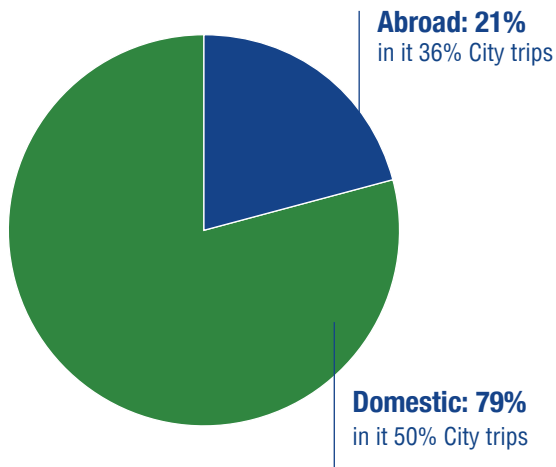
Share of all short breaks, travel duration two to four days in 2022



# SHORT BREAKS IN GERMANY AND ABROAD

by Germans

Travel duration two to four days in 2022



**76.8 million**  
total trips

## Day trips made by Germans 2022

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





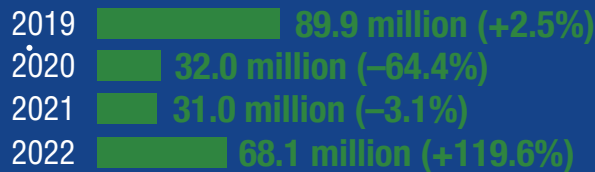
# All OVERNIGHT STAYS in Germany

Tourism in Germany is recovering from the dramatic declines during the Corona restrictions. The total number of overnight stays in Germany rose by 45.3% to 450.8 million. Overnight stays by visitors from Germany, at 382.7 million (+37.1%), have almost reached the level of the record year 2019. Overnight stays by visitors from abroad increased by 119.6% to 68.1 million, but have not yet reached the pre-Corona level.

## Overnight stays of German visitors



## Overnight stays by foreign visitors



End 2021:



27,731  
Businesses



1.86 million  
Beds



83€  
Average  
room rate

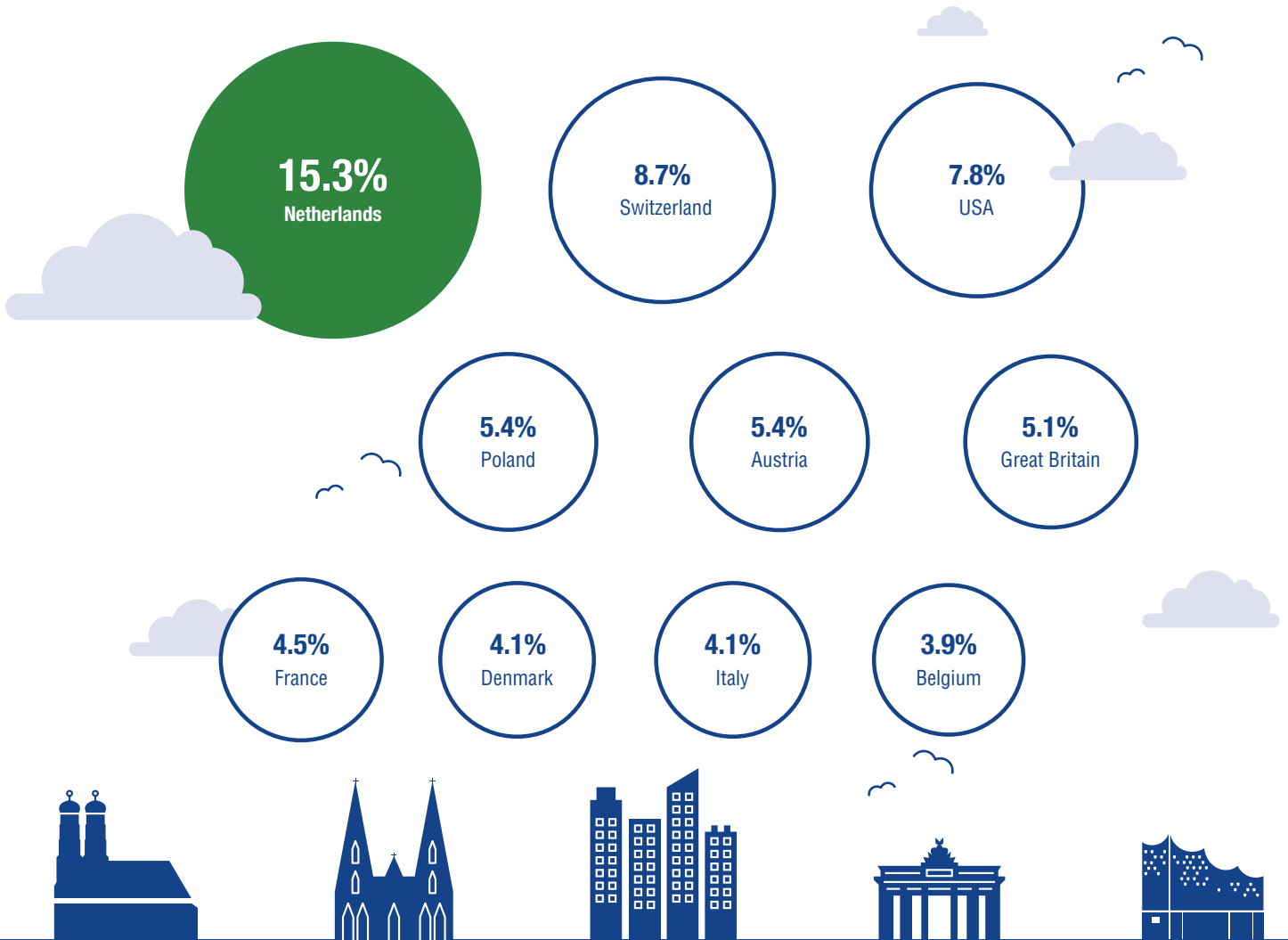


31.5%  
Average room  
occupancy

Sources: Statistisches Bundesamt, Hotelverband Deutschland (IHA)

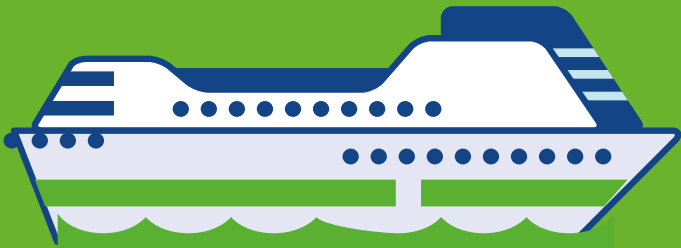
# The most important **SOURCE MARKETS** for Germany

Share of all overnight stays from abroad 2022



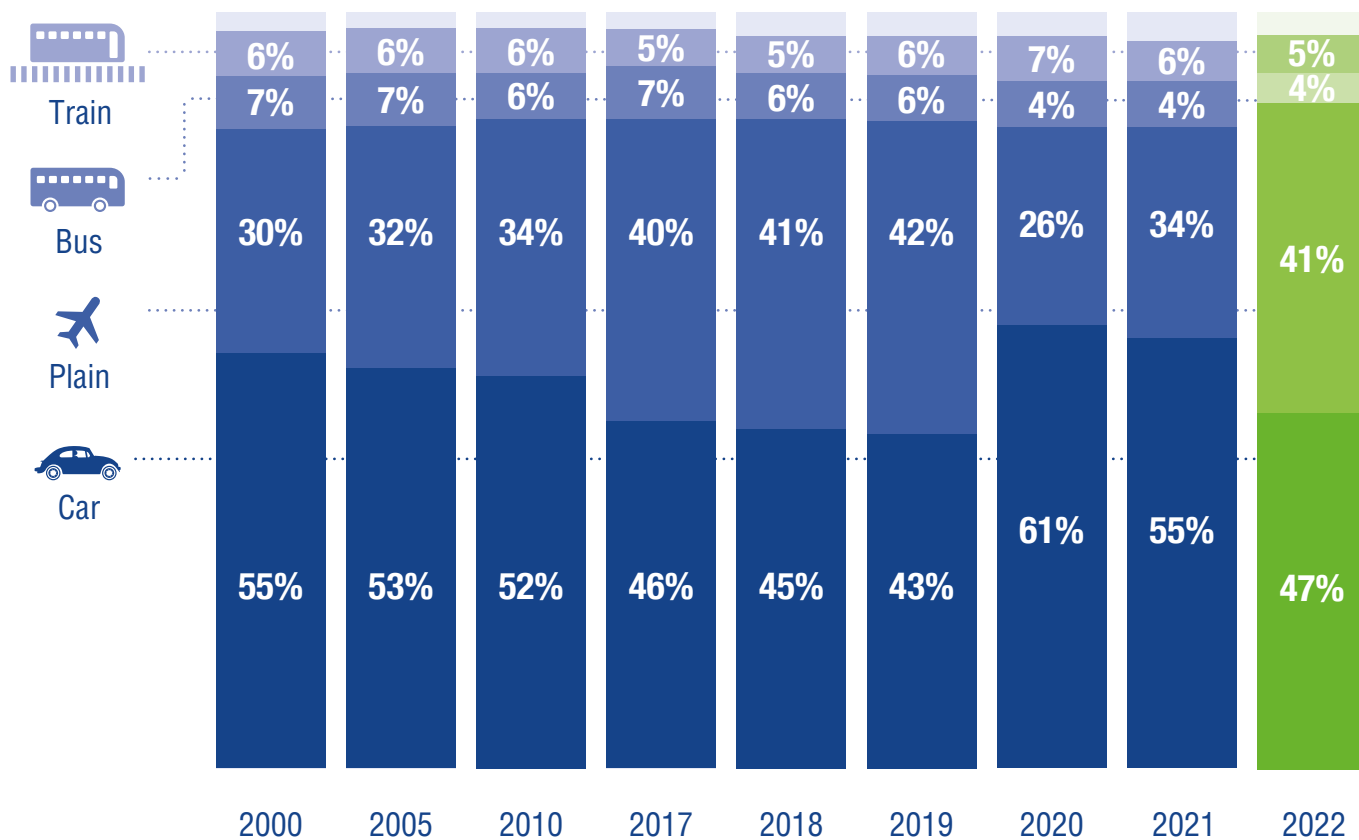


# MEANS OF TRANSPORT



# The most popular MEANS OF TRANSPORT for holiday trips

German holiday trips of 5 days or more, percentage share

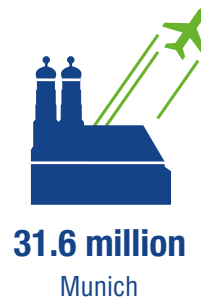
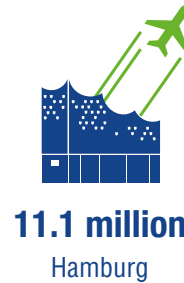
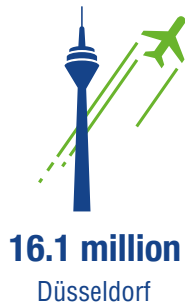


Difference to 100 percent: other means of transport such as ship

Source: Reiseanalyse 2023

# The 5 biggest **AIRPORTS** in Germany

Number of passengers in millions in 2022



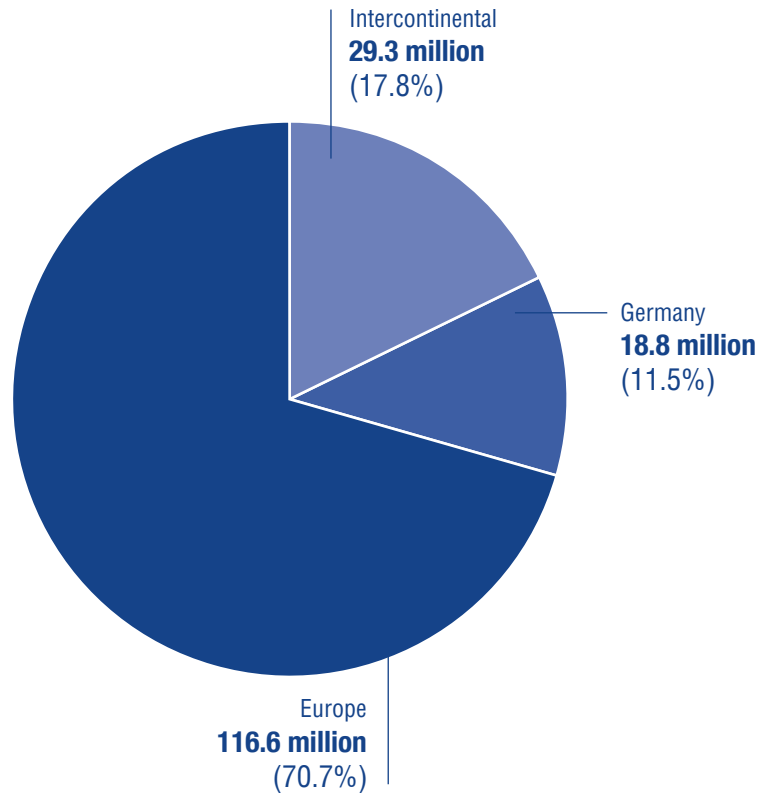
# PASSENGER VOLUME

## in aviation

After the sharp declines due to the Corona measures, air traffic recovered in 2022. A total of **165.1 million** passengers took off and landed at German airports (2021: 78.6 million). This is an increase of **110.1%** compared to 2021, but still **34.5%** below the pre-Corona year 2019

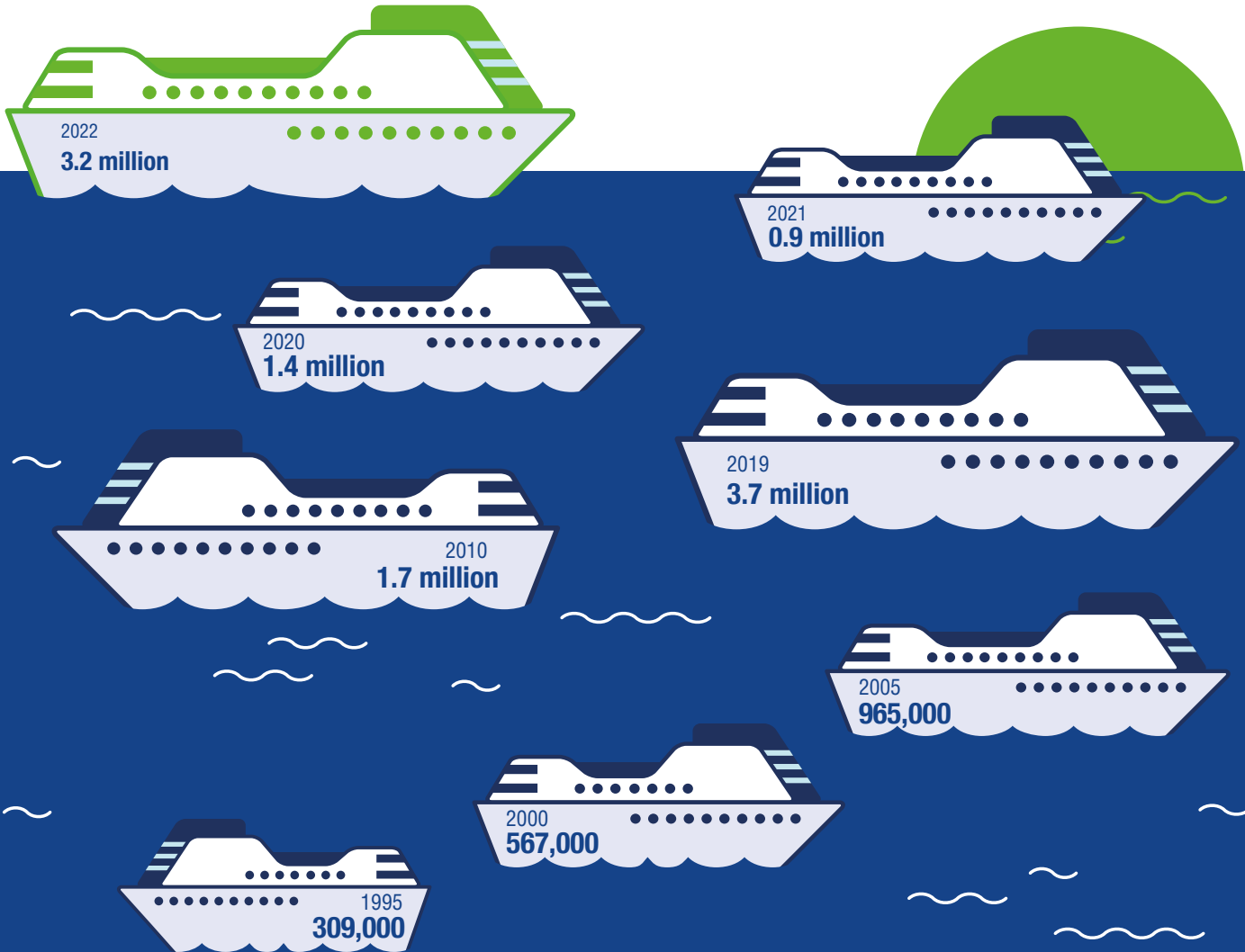


**165.1 million**  
Total air passengers  
(excluding transit)



# CRUISES

## Passengers on rivers and oceans



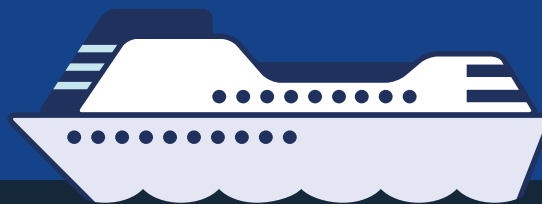
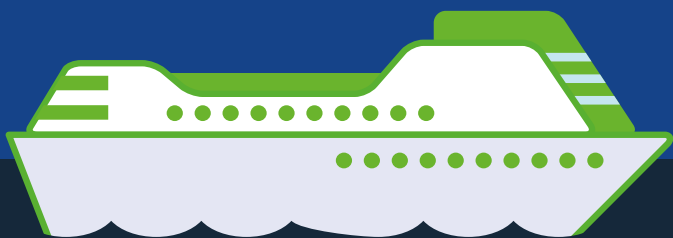
# THE CRUISE MARKET GERMANY

## Ocean Cruises

	2019	2020	2021	2022
Number of passengers	2,943,400	1,097,900	736,600	2,526,100
Expenses in advance, in million euros	5,121.0	2,078.8	907.9	3,423.8
Expenses in advance, per person/trip	1,740 €	1,893 €	1,233 €	1,355 €
Ø Travel time	10.9 nights	10.6 nights	8.8 nights	9.8 nights

## River Cruises

	2019	2020	2021	2022
Number of passengers	727,400	307,400	209,400	644,800
Expenses in advance, in million euros	853.2	300.0	241.2	685.3
Expenses in advance, per person/trip	1,173 €	976 €	1,151.9 €	1,063 €
Ø Travel time	8.3 nights	7.4 nights	7.4 nights	7.6 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** 2021

	2019	2020	2021
<b>Number</b>	<b>195.4 million</b>	<b>32.7 million</b>	<b>41.4 million</b>
Average costs	<b>312 €</b>	<b>323 €</b>	<b>334 €</b>
Costs per person / day	<b>162 €</b>	<b>161 €</b>	<b>147 €</b>
<b>Total overnight stays Business Travel</b>	<b>74.3 million</b>	<b>17.4 million</b>	<b>24.1 million</b>
Thereof companies with 10-500 employees	<b>42.3 billion €</b>	<b>8 billion €</b>	<b>10.2 billion €</b>
Thereof companies with >500 employees	<b>13 billion €</b>	<b>2.1 billion €</b>	<b>3.2 billion €</b>
<b>Total costs</b>	<b>55.3 billion €</b>	<b>10.1 billion €</b>	<b>13.4 billion €</b>



In 2021, there were a total of **41.4 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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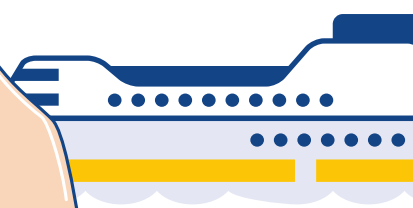
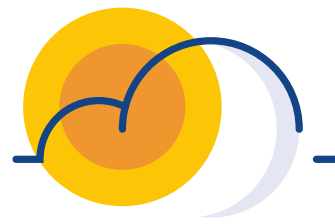
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