

THE GERMAN TRAVEL MARKET

Facts and figures 2025

Status: March 2026



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

German citizens spent a new record sum of 87.9 billion euros on multi-day holidays booked in advance of the trip.

Travel spending increases again



The economic importance of the tourism industry in 2025 at a glance

67.7 million

Vacation trips lasting 5 days or more (previous year: 68.3 million)

over **50%**

of tour operator trips are booked by Germans at travel agencies

2,300

Tour operators in Germany

57.1 million

Travelers on vacation trips lasting 5 days or more (previous year: 56.4 million)

1.2

Trip frequency (average number of trips per traveler)

80.5%

Travel intensity (proportion of the population that travels)

2.9 million

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

497.5 million

Overnight stays in Germany (+0.3%)

22.2%

of German citizens' trips will be to Germany in 2025

Market structure

in the German tourism market

2025

43.4 (49.4%)

Tour operators / travel agencies

Bookings for tour operators

9.4 (10.7%)

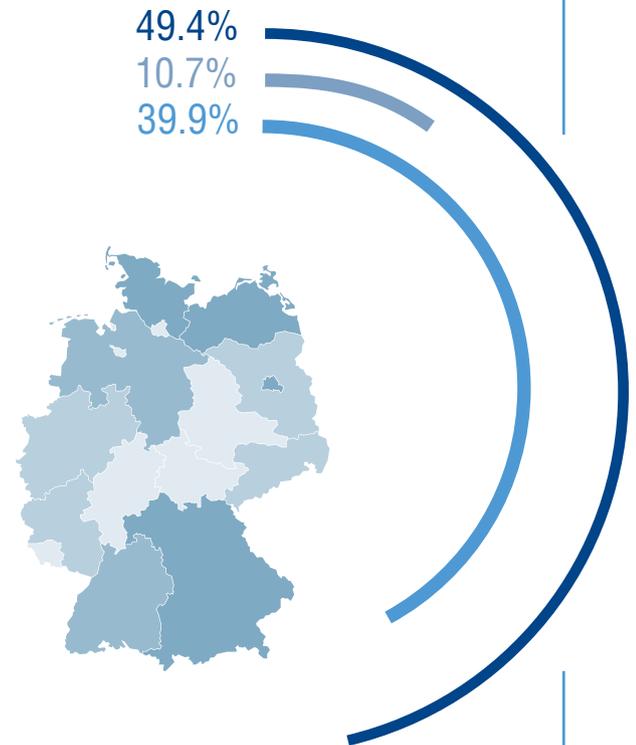
Product portals and others

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

35.1 (39.9%)

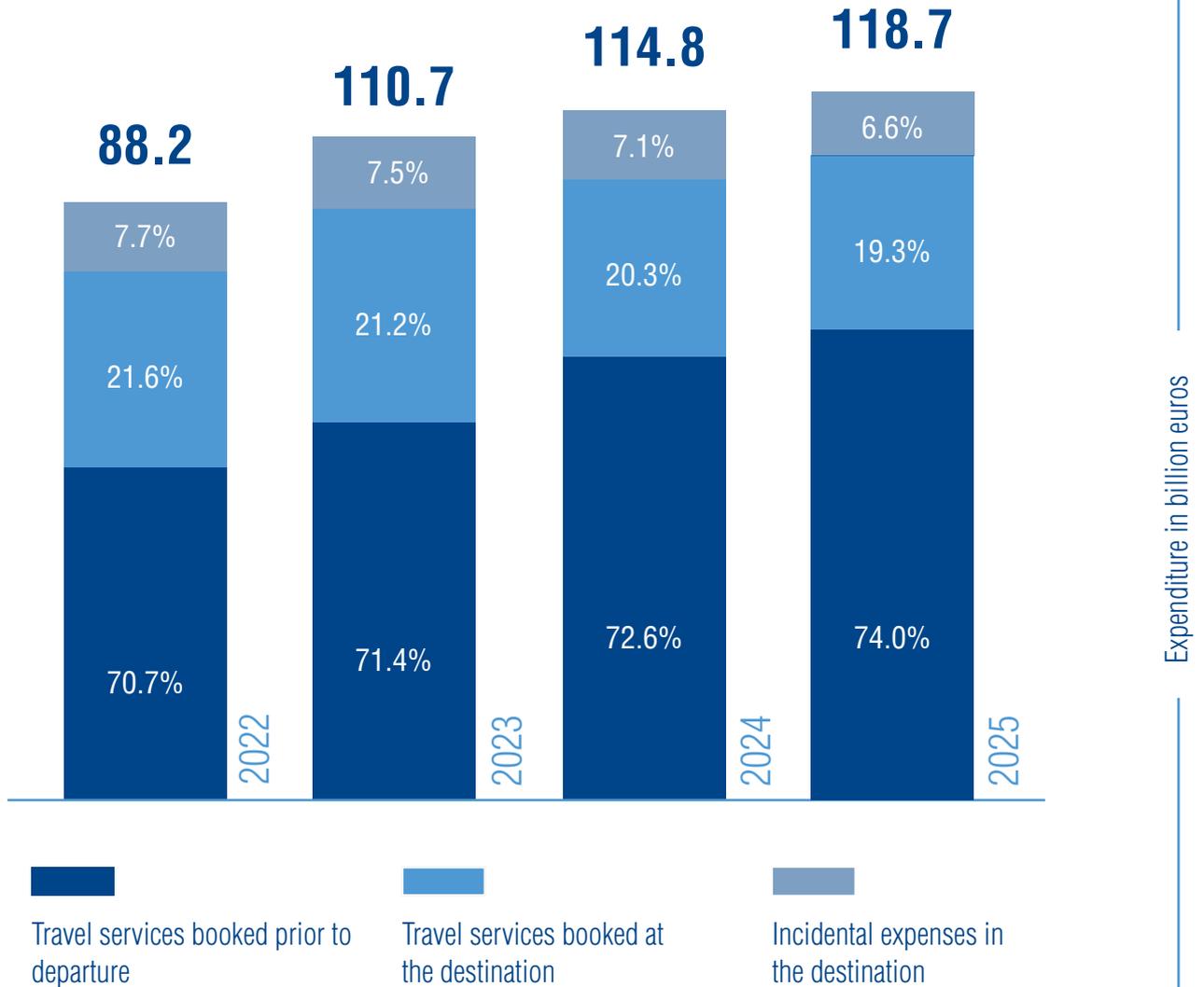
Service providers online & offline

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



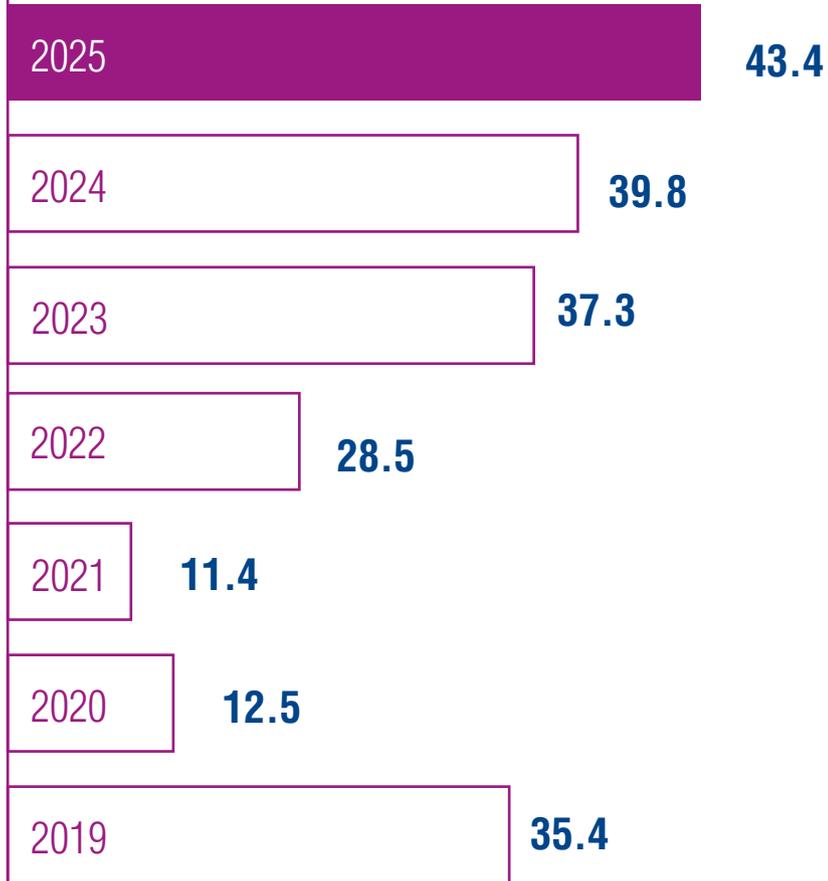
Expenditure in billion euros

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

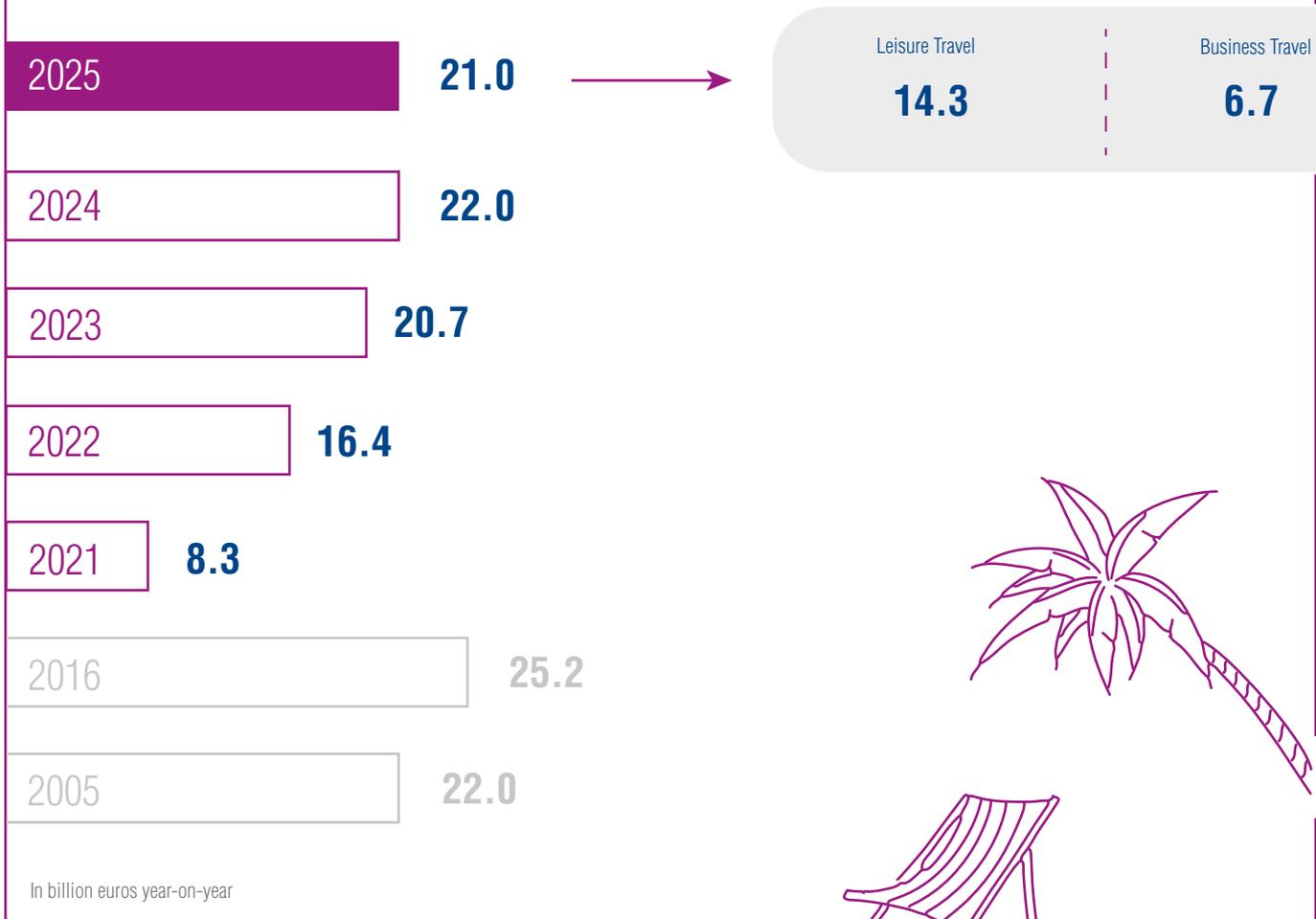
Development of
tour operator sales
in Germany



Travel expenditure in billion euros



Sales development of travel agencies with vacation and business trips

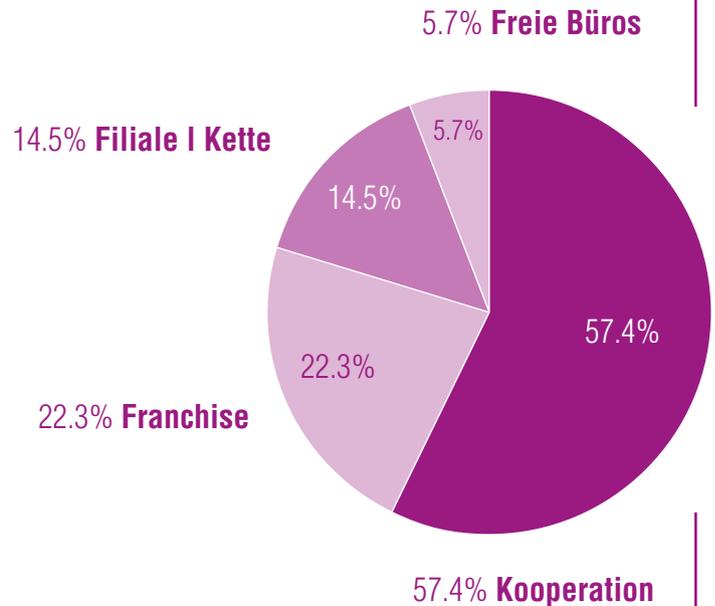


Number of
touristic travel agencies
in the German sales market

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

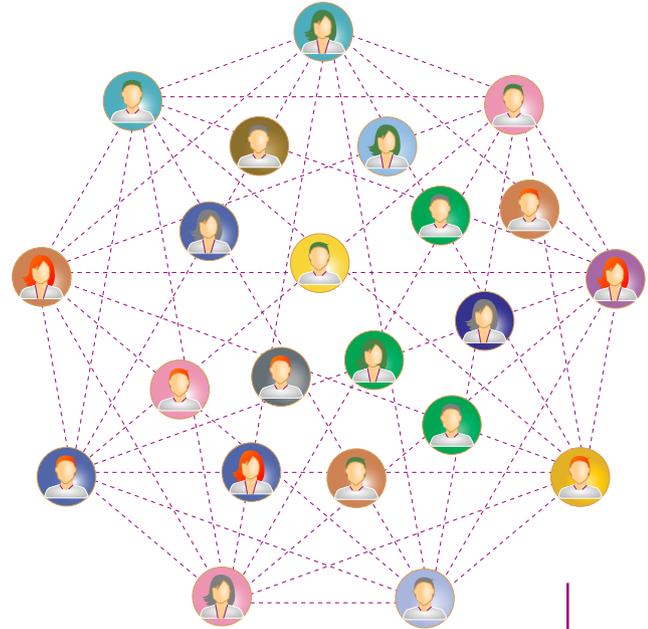
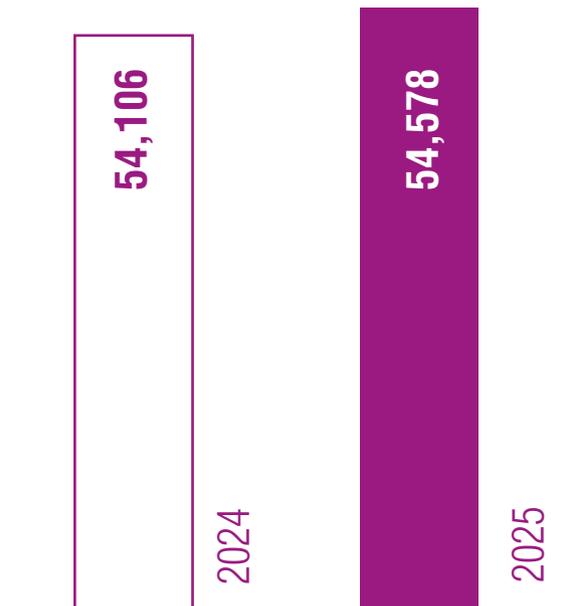
7,996



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

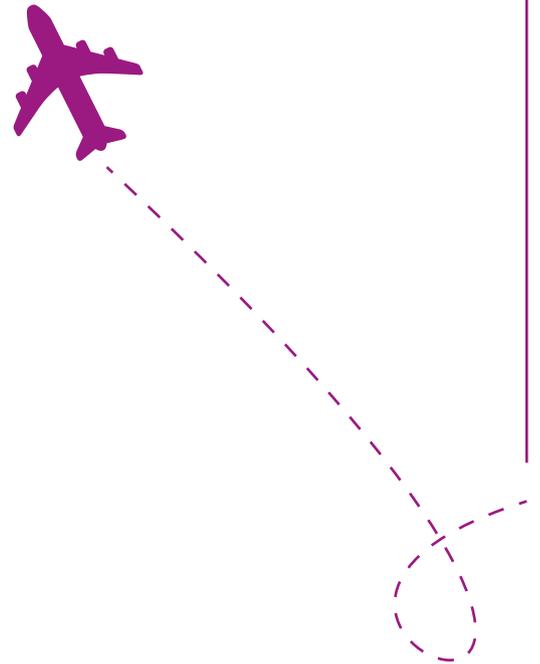


An increase of 0.9%

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

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

In 2025, there were more than 1.5 billion tourist arrivals, reaching the level of 2019.

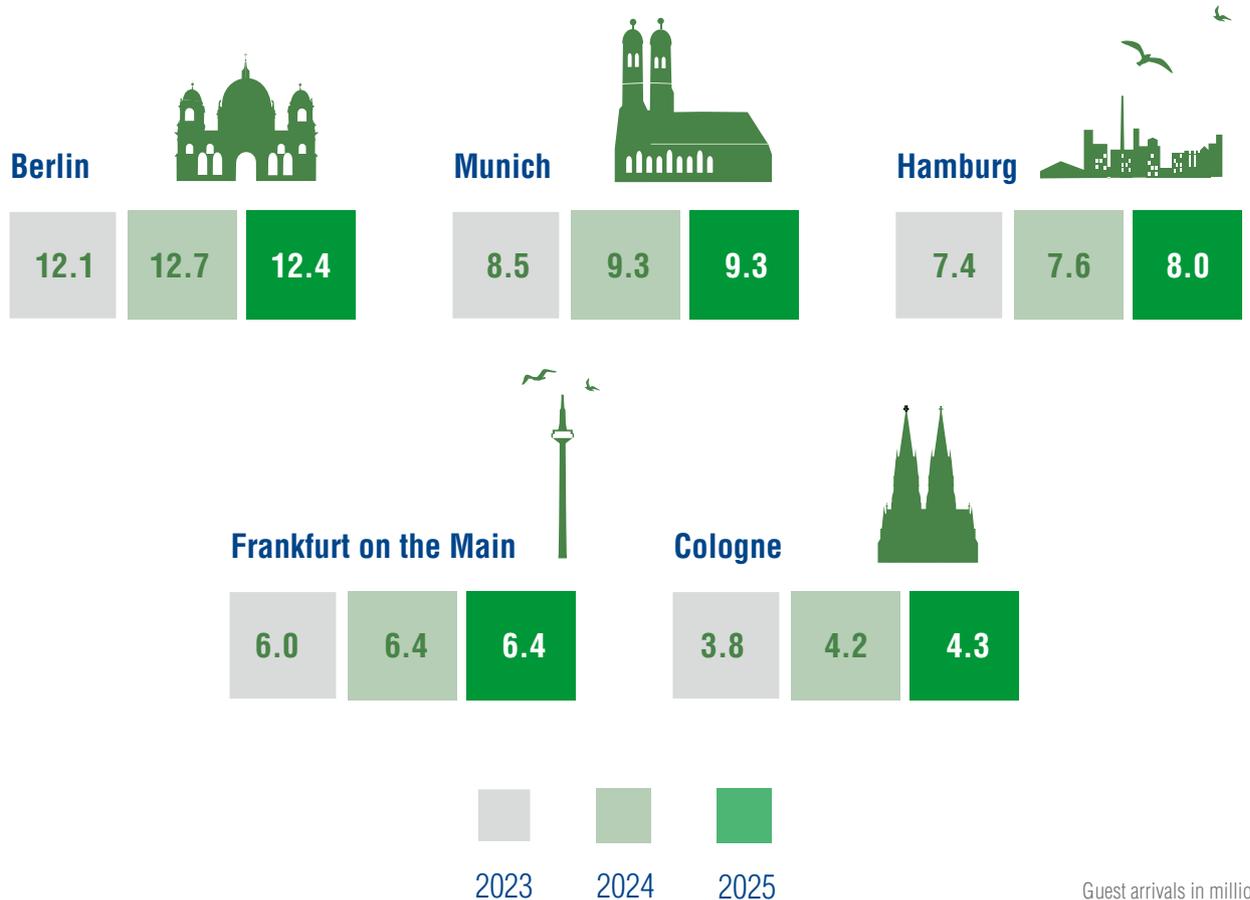
	2023	2024	2025
World	1,322	1,465	1,523
Europe	714	765	794
Asia/Pacific	249	311	331
North-/South America	200	217	218
Africa	66	75	81
Middle East	93	97	100

International guest arrivals in millions.

The 5 most popular

City break destinations for Germans and foreigners

in Germany 2025



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**

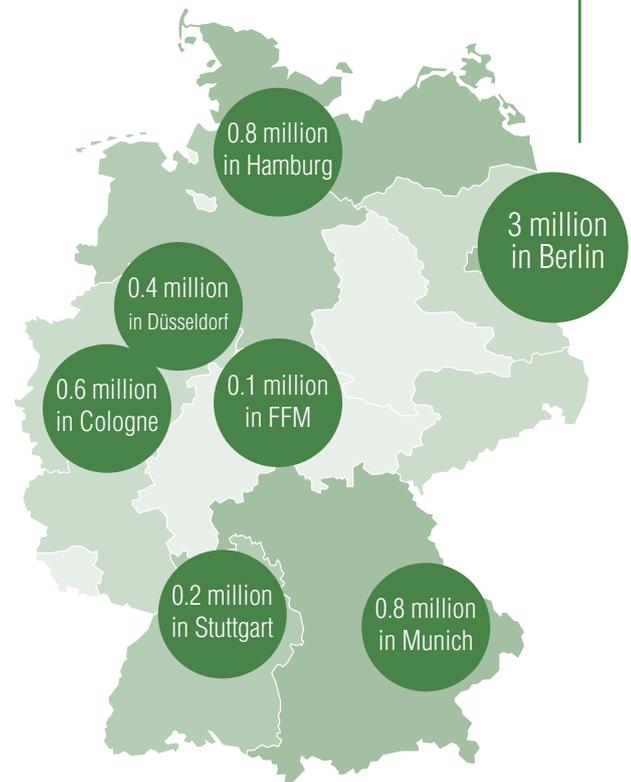
The distribution in Germany:

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.



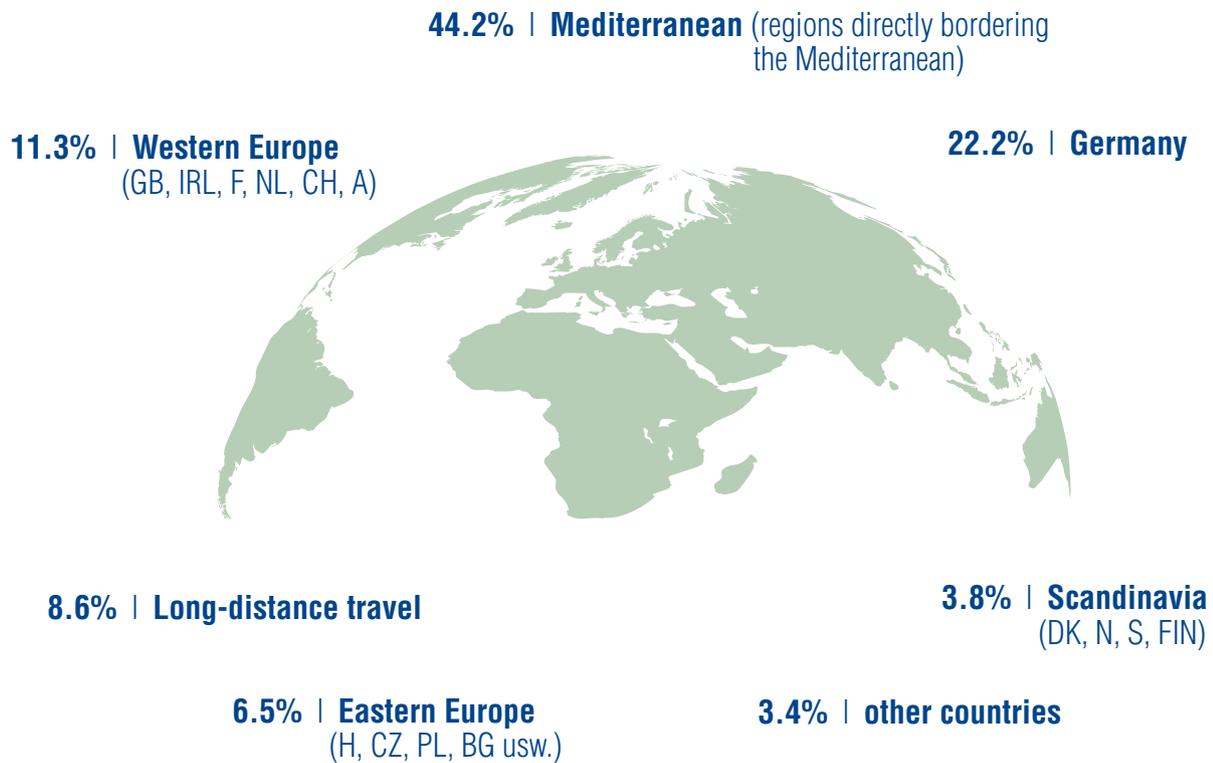
The
vacation destinations
of Germans worldwide

67.7 million

Long vacations in Germany

77.8% thereof abroad

22.2% thereof in Germany

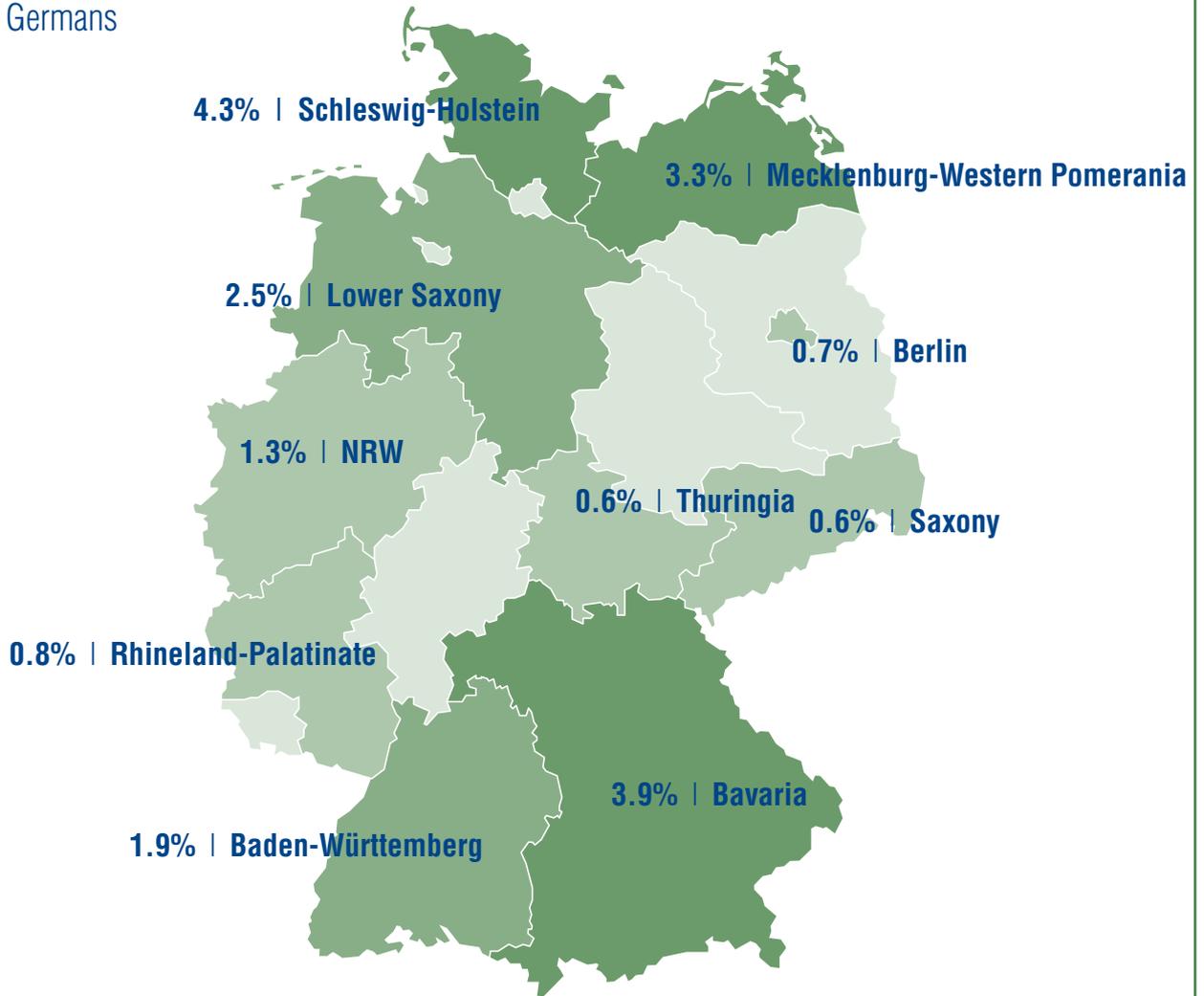


Vacation trips lasting five days or more 2025

The 10 most popular

Domestic vacation destinations

of the Germans

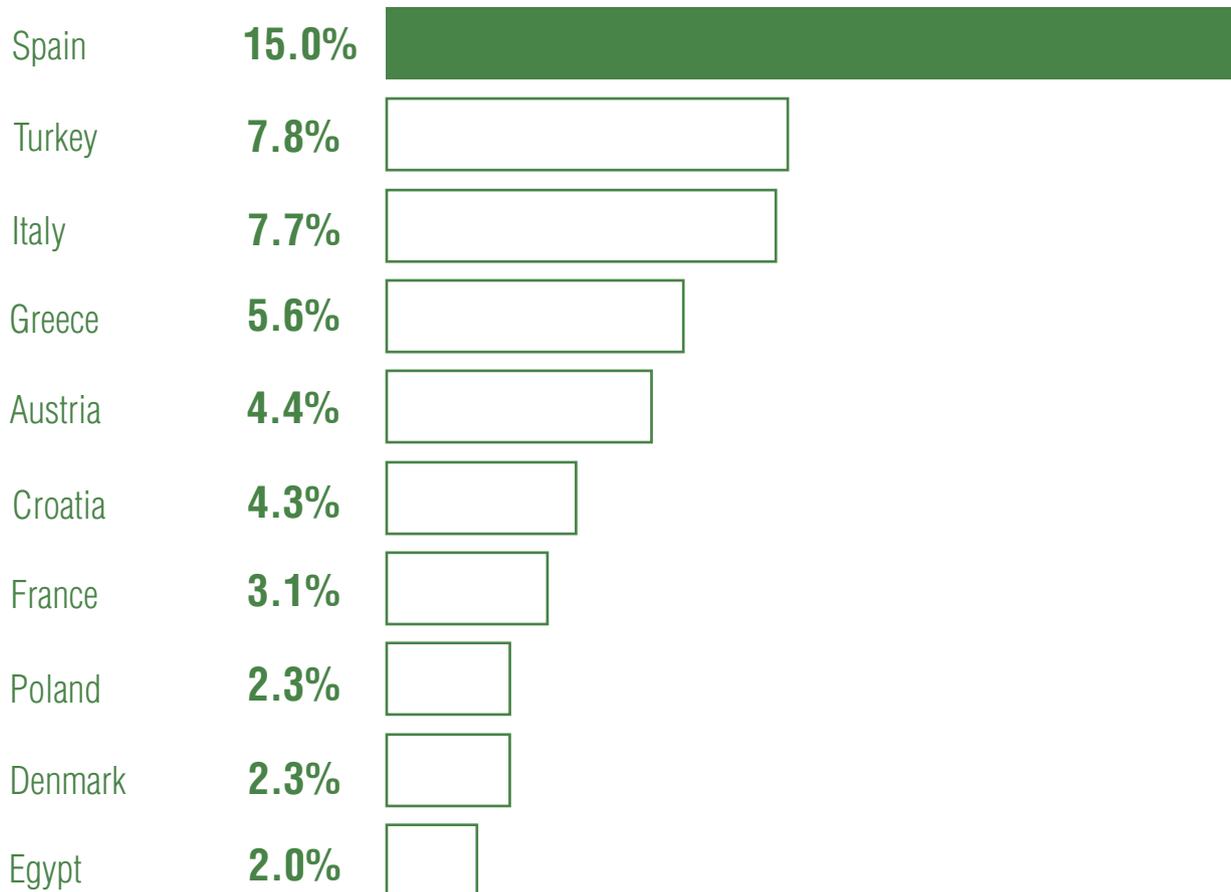


Vacation trips lasting five days or more 2025

The 10 most popular

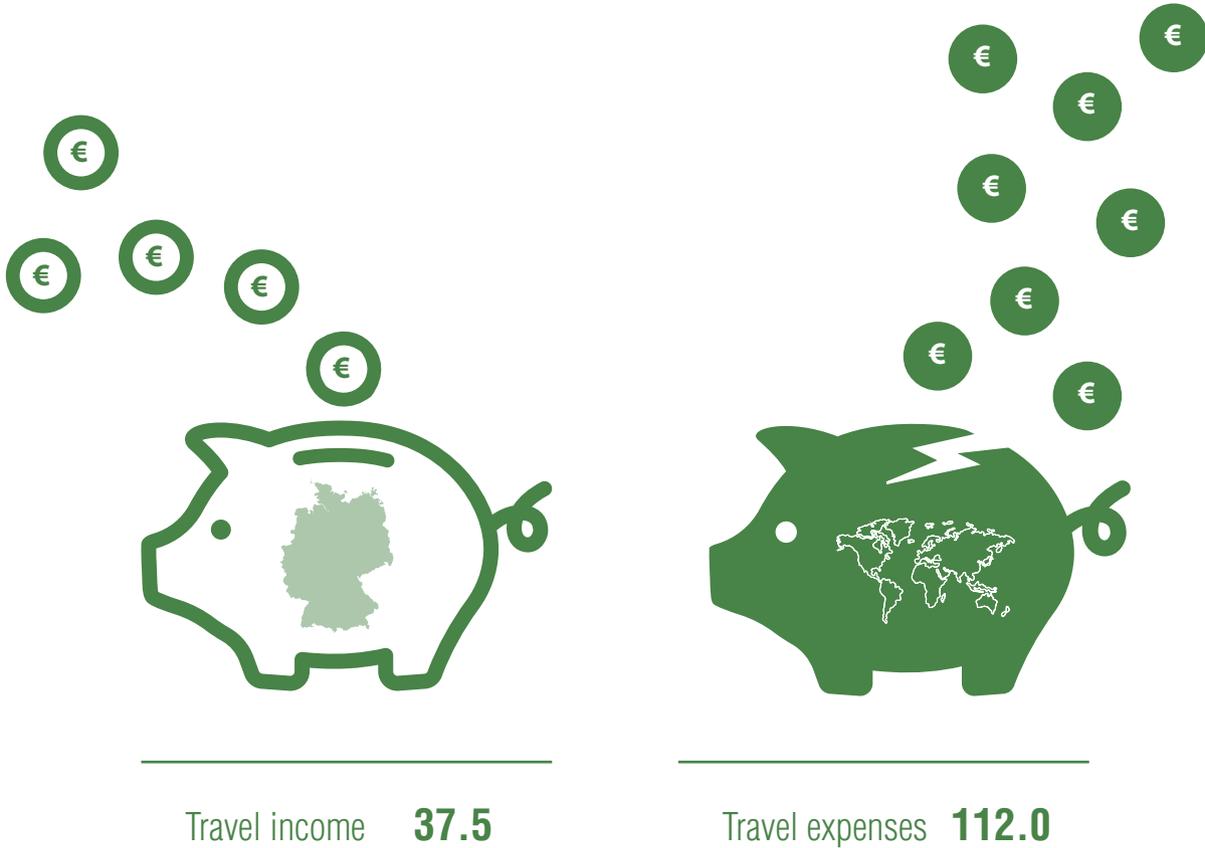
Vacation destinations abroad

of the Germans



Vacation trips lasting five days or more 2025

The
travel income and travel expenses
of Germans in international travel



In billion euros



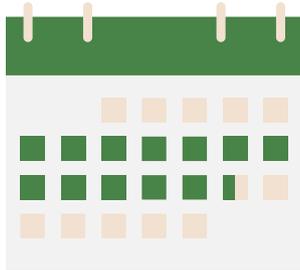
Income refers to Germany's income from international travel.

Expenses is the amount spent by Germans on trips abroad.

	Income	Expenses
2025	37.5	112.0
2024	37.1	107.9
2023	35.0	106.8
2022	30.3	85.2
2021	18.8	43.2
2020	19.4	34.0
2010	26.2	58.9

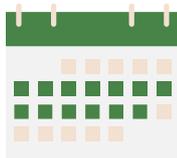
In billion euros

The average trip duration

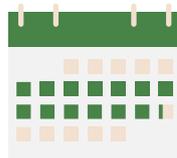


12.4 days

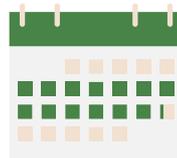
was the average trip duration in 2025.



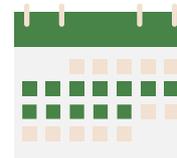
13.0
2024



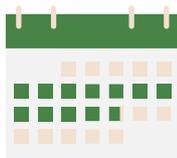
13.3
2023



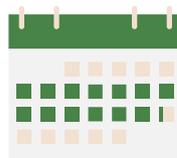
13.2
2022



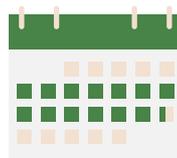
12.0
2021



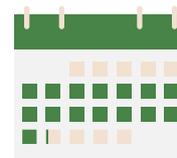
11.6
2020



13.2
2010



13.4
2008

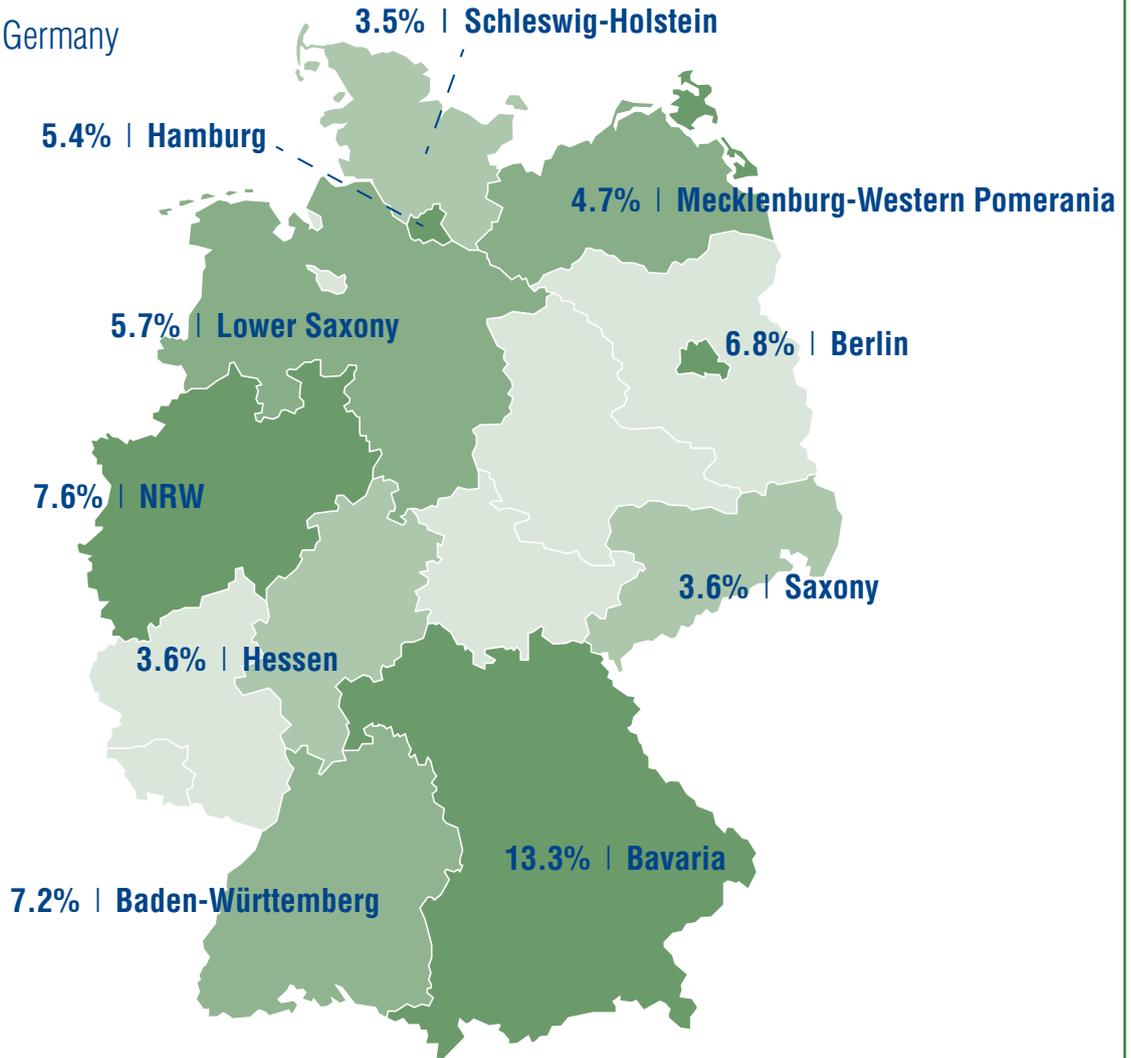


15.1
1998

Ø Length of stay in days

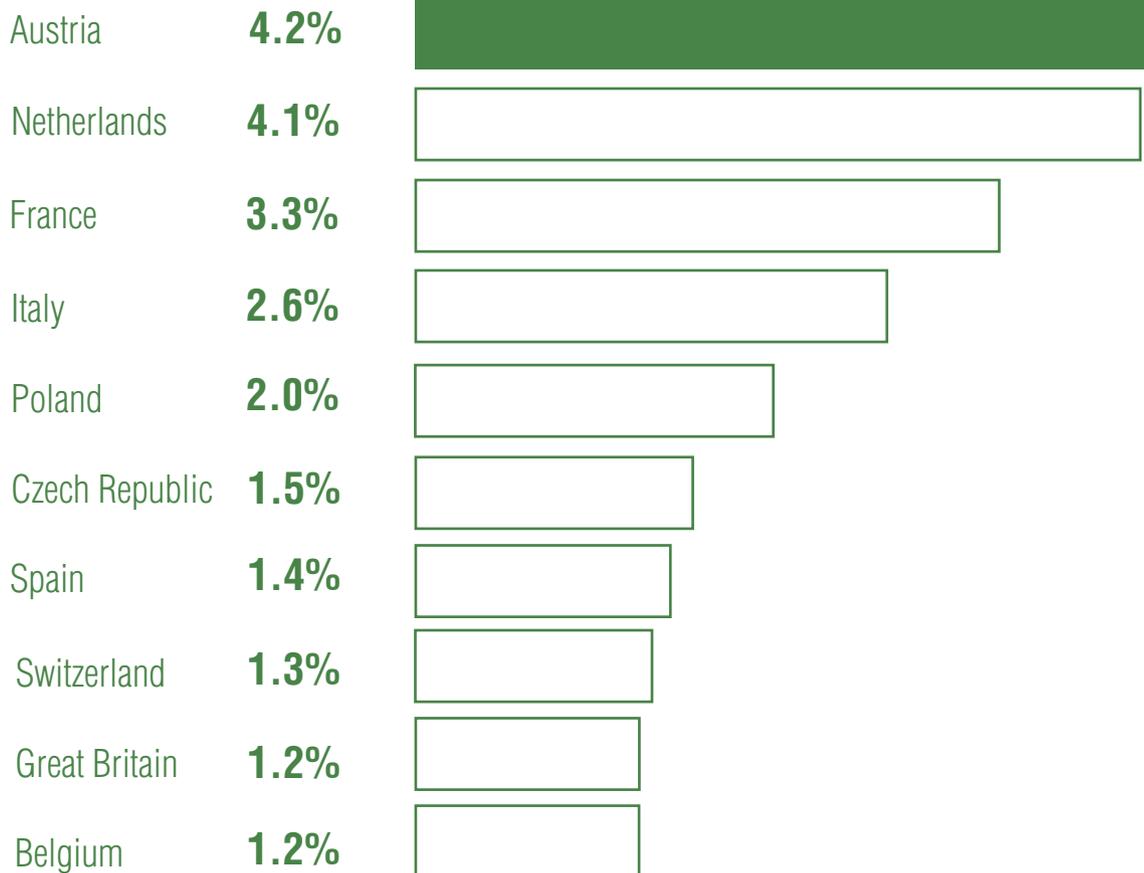
The 10 most popular
short vacation destinations

for Germans in Germany



Share of all short breaks, travel duration two to four days 2025

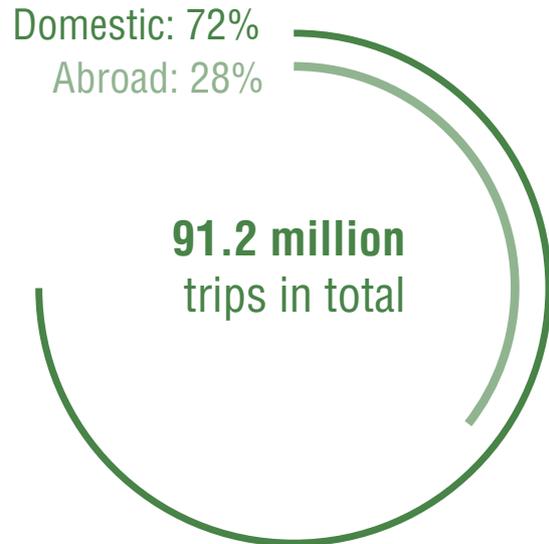
The 10 most popular
short vacation destinations
of Germans abroad



Share of all short breaks, travel duration two to four days 2025

The short breaks at home and abroad of the Germans 2025

Travel duration two to four days



The daily trips of Germans in 2024

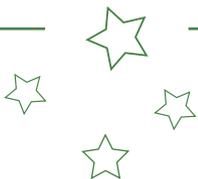
Number of one-day private trips in thousands (from 50 km distance)



All

overnight stays

in Germany



29,147
Companies*



998,910
Rooms*

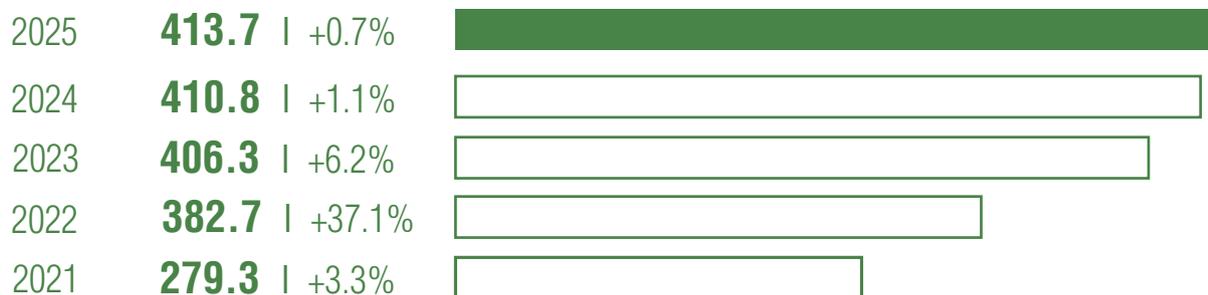


111 €
Ø Room
price*

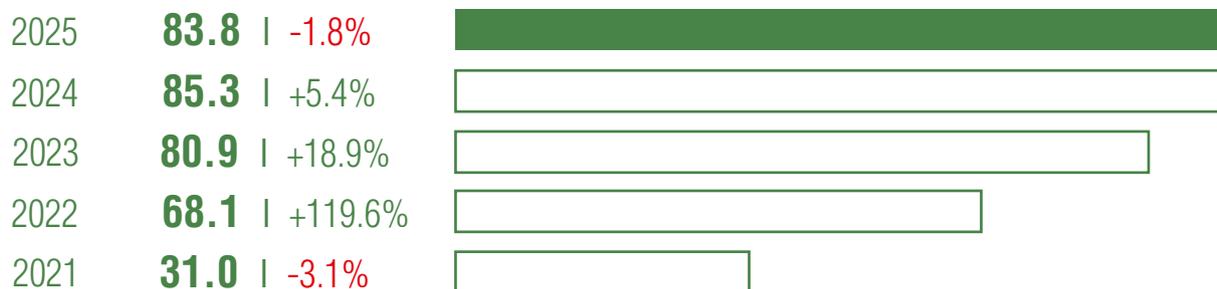


67.7%
Ø Room
occupancy*

Overnight stays by German visitors



Overnight stays by foreign visitors

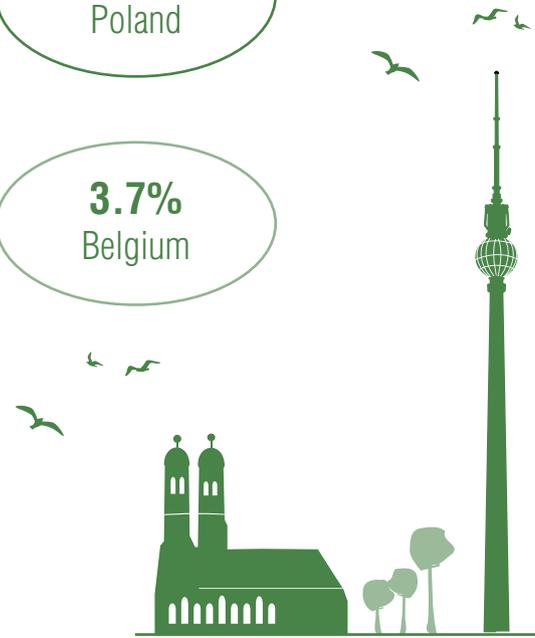
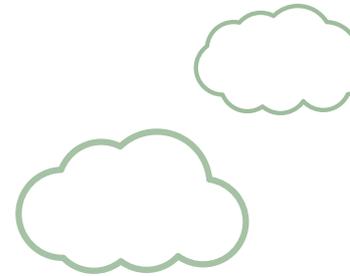


The total number of overnight stays in Germany amounted to 497.5 million.

The most important

Source markets for travel

to Germany

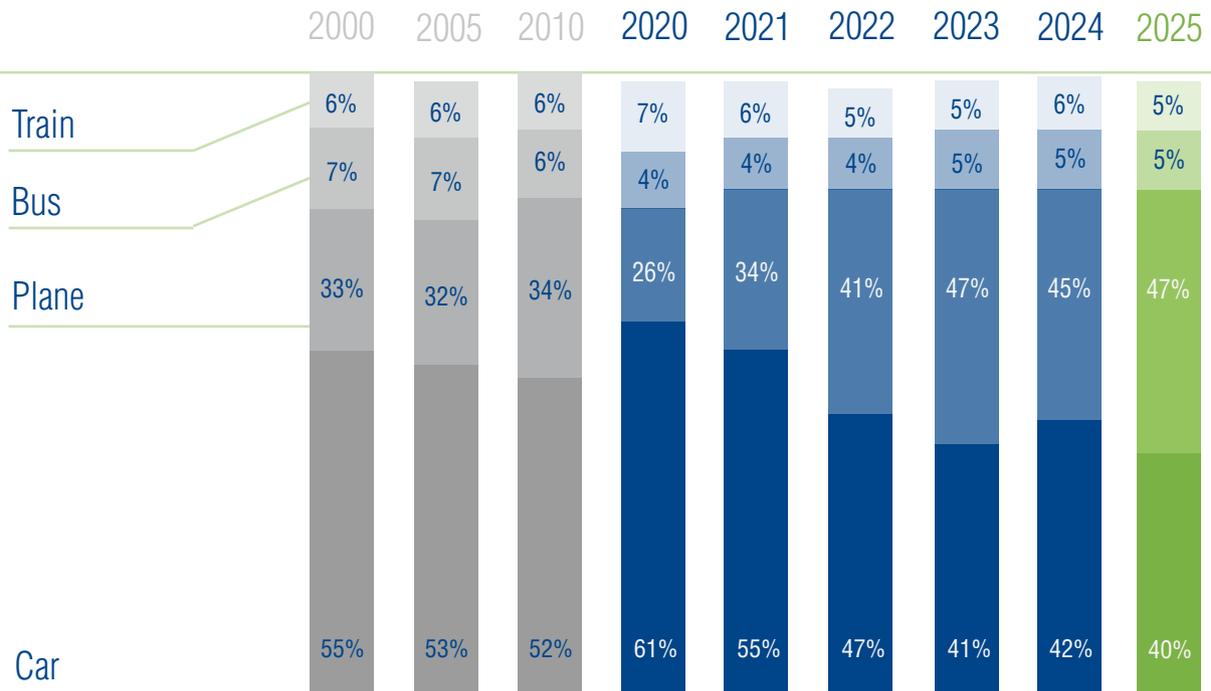


Share of all overnight stays from abroad 2025

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

63.1 - - - - Frankfurt on the Main

43.4 - - - - Munich

26.0 - - - - Berlin

21.0 - - - - Duesseldorf

14.8 - - - - Hamburg

Number of passengers in 2025 in millions

Passenger volume

in air traffic

Europe 69.4%
Germany 10.9%
Intercontinental 19.7%

152.1 ----- Europe (+ 3.6% | 69.4%)

24.0 ----- Germany (+ 0.2% | 10.9%)

43.2 ----- Intercontinental (+ 4.5% | 19.7%)

219.3 million passengers

in total air traffic (without transit)

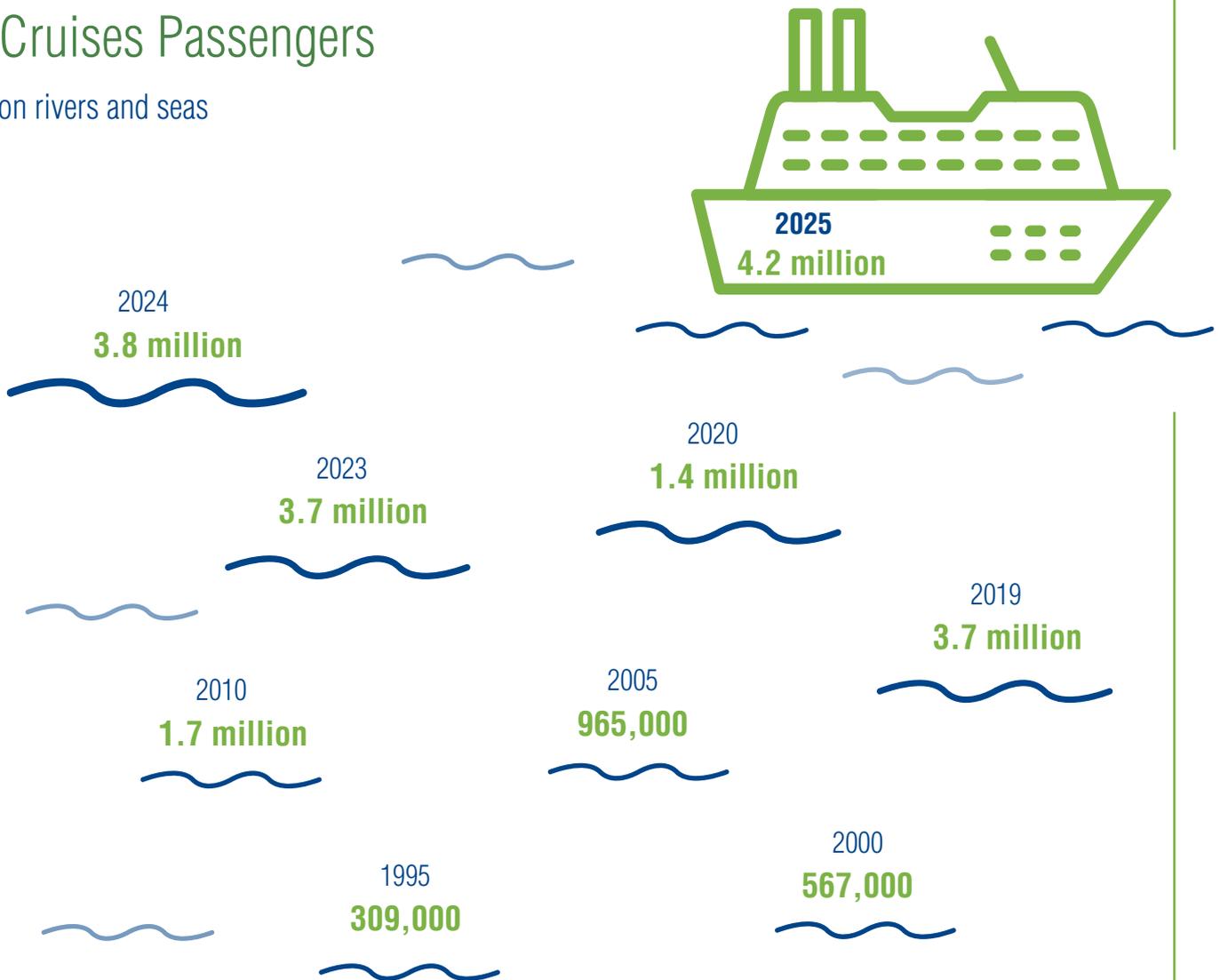


Following the sharp declines due to the COVID-19 pandemic, air traffic continued to recover in 2025.

A total of 219.3 million passengers took off and landed at German airports (2024: 211.6 million). This represents an increase of 3.6% compared to 2024.

Cruises Passengers

on rivers and seas



The cruise market in Germany



Ocean cruises

	2022	2023	2024	2025
Passenger numbers	2,526,100	2,961,900	3,003,700	3,341,700
Expenditure in advance in € million	3,423.8	4,649.6	5,280.7	5,584.8
Expenditure in advance p.p./trip	1,355 €	1,570 €	1,758 €	1,671 €
Ø Trip duration	9.8 Nights	10.1 Nights	10.0 Nights	9.7 Nights

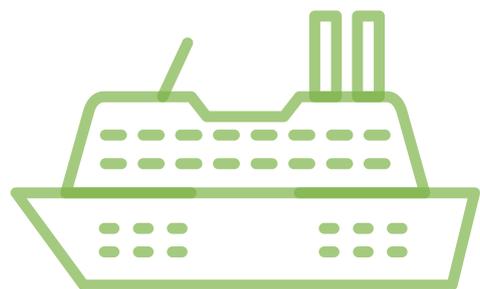
River cruises

	2022	2023	2024	2025
Passenger numbers	644.,00	700,000	840,200	863,200
Expenditure in advance in € million	685.3	829.1	1,001.3	1,153.2
Expenditure in advance p.p./trip	1,063 €	1,184 €	1,198 €	1,336 €
Ø Trip duration	7.6 Nights	7.4 Nights	7.3 Nights	7.4 Nights



The most important cruising areas for River and ocean cruises

Ocean cruises	2024	2025	River cruises	2024	2025
Western Mediterranean	13.7%	20.2%	Danube	18.9%	22.4%
Eastern Mediterranean	7.3%	5.1%	France <small>without Strasbourg</small>	9.4%	13.8%
Atlantic & Canary Islands <small>including Madeira, Cape Verde, Azores, Portugal</small>	11.6%	13.8%	Nile	12.3%	9.4%
North Sea	36.3%	37.0%	Rhine and tributaries <small>including Strasbourg</small>	52.1%	44.1%
Baltic Sea & Baltic States	7.9%	6.5%	Other Europe	6.9%	8.4%
Caribbean, Central and South America	7.8%	6.4%	Other	0.4%	1.9%
Arabian Gulf/Orient/Egypt	3.5%	2.5%			
Transatlantic & World Travel	1.9%	2.3%			
Asia/Oceania/Australia	2.4%	1.9%			
Other	7.6%	4.4%			



BUSINESS TRAVEL MARKET

Developments in the German
Business travel market
 2024



	2022	2023	2024
Number <small>in million</small>	75.1	116.7	107.1
Average costs <small>in euro</small>	371	409	439
Total costs <small>in billion euros</small>	26.9	46.2	47.2
of which companies with 10-500 employees <small>in billion euros</small>	21.0	35.9	36.5
of which companies with >500 employees <small>in billion euros</small>	5.9	10.3	10.7

In 2024, there were a total of 107.1 million business trips by employees of companies based in Germany.



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