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tourismusverband

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The tourism year 2023 in retrospect

Dear members, partners and friends of the DTV,



With these facts **and** figures, we are providing you with an exciting compendium and taking a closer look at tourism over the past year. The results are impressive and I am very pleased to see how well and quickly German tourism has recovered after the pandemic years. But what exactly is behind these successful figures? And what are the individual developments? We provide you with the well-founded answers.

However, the world of tourism is not just about numbers. Tourism means relaxation, health, culinary delights and, above all, peaceful encounters between people, no matter where they come from. Tourism fundamental democratic values such as openness to the world, tolerance and diversity. German tourism lives these values and demonstrates a clear attitude. We will continue to help shape the future with this claim.

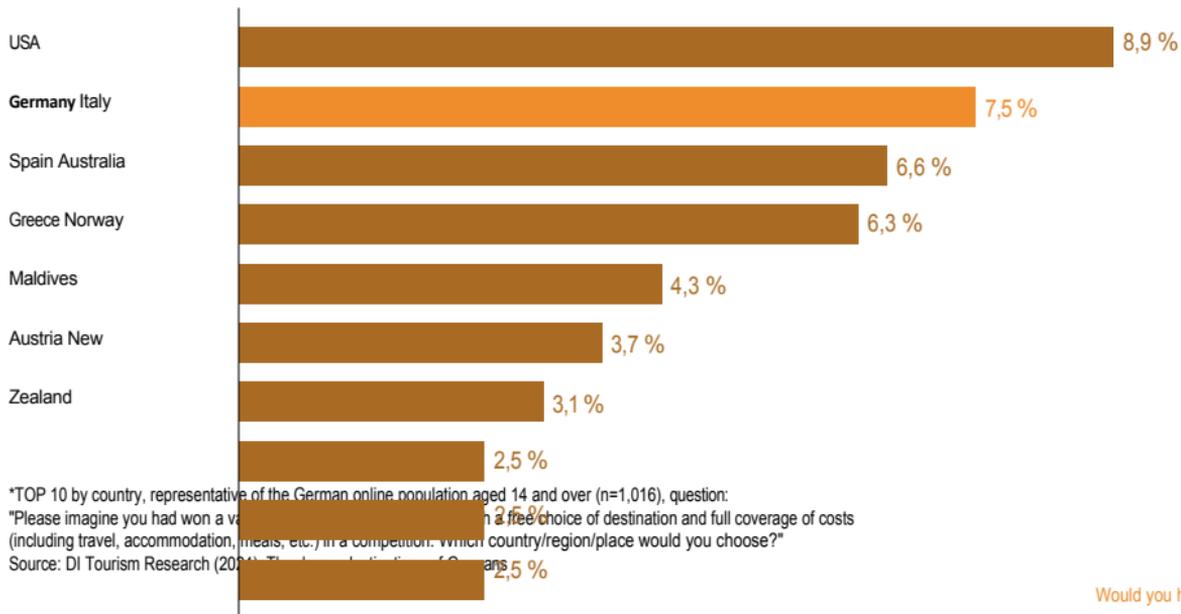
Yours sincerely

Reinhard Meyer

President Deutscher Tourismusverband e.V.

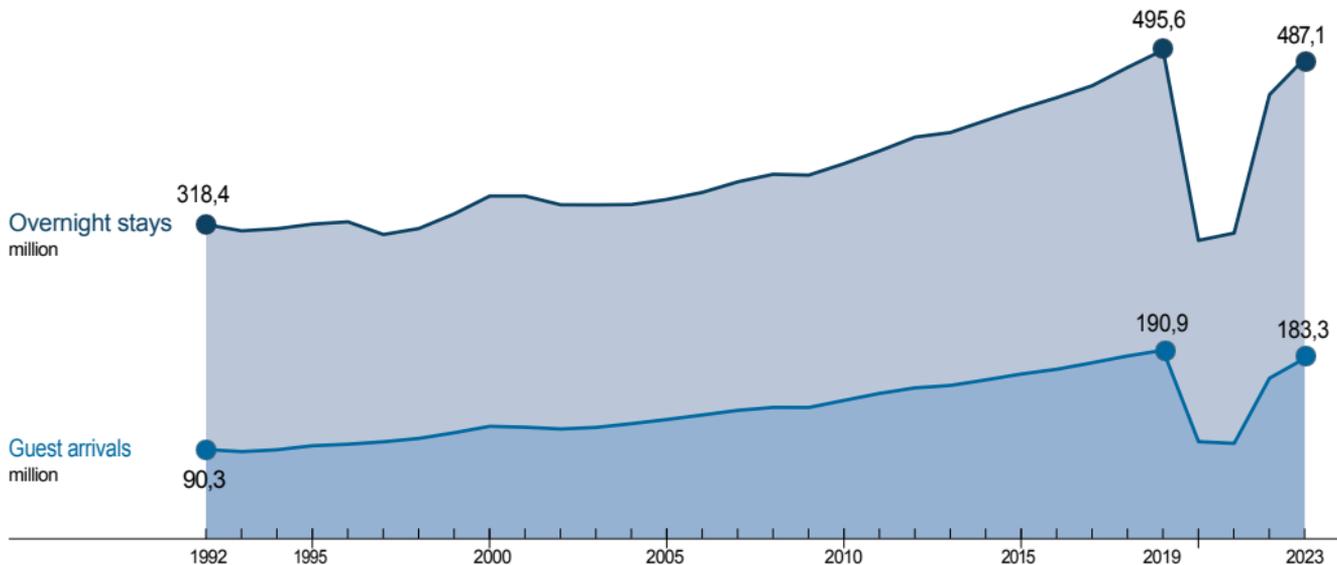
Would you have thought so?

Germany in 2nd place among Germans' dream destinations'



Overnight stays: Second best result in history

Development of guest arrivals and overnight stays since the start of all-German statistics*



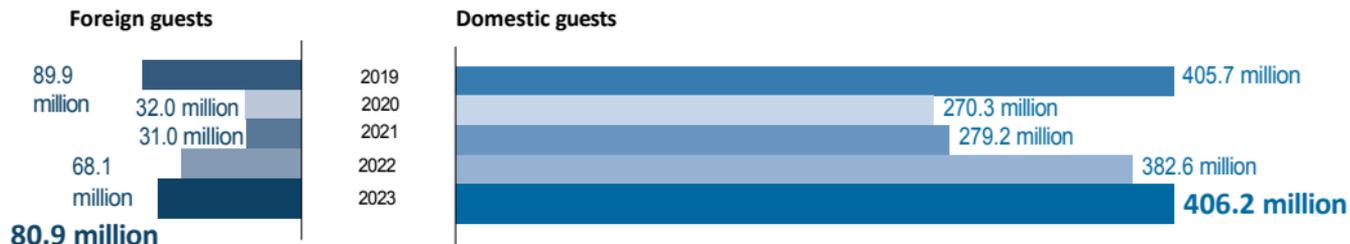
*The figures up to 2010 refer to accommodation establishments with 9 beds or 3 or more parking spaces, from 2011 onwards to establishments with 10 beds or more parking spaces

Source: Federal Statistical Office (2024)

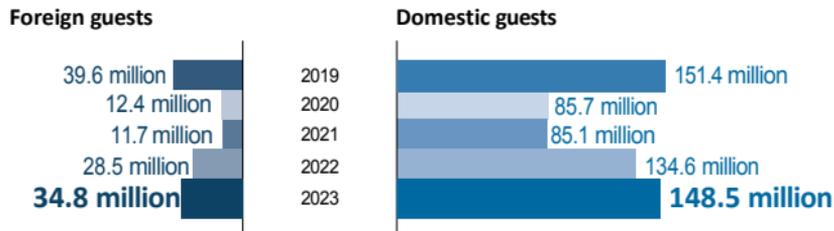
Domestic tourism slightly above pre-crisis level

Balance sheet in accommodation establishments with 10 beds or more or parking spaces

487.1 million overnight stays +8.1 % compared to 2022

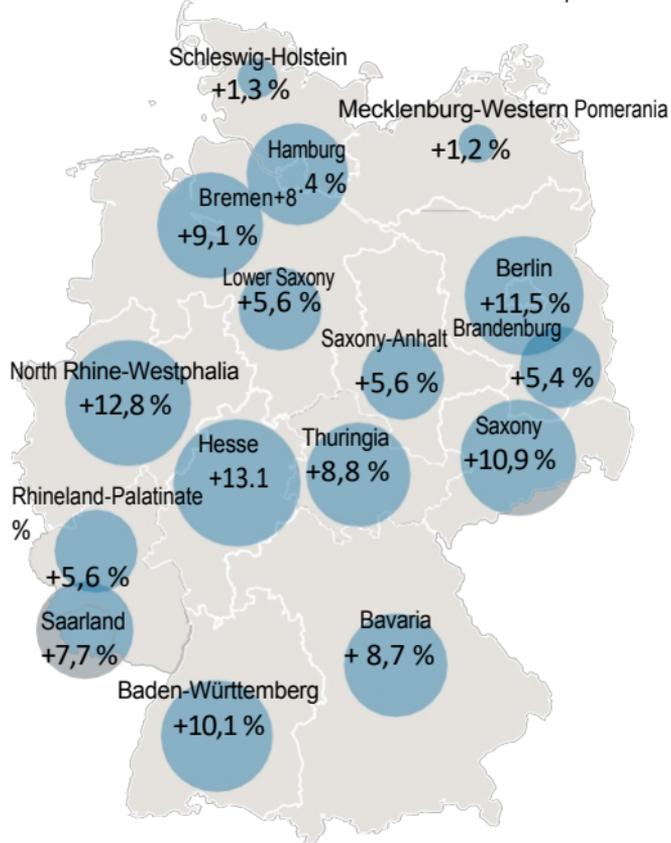


183.3 million guest arrivals +12.4 % compared to 2022



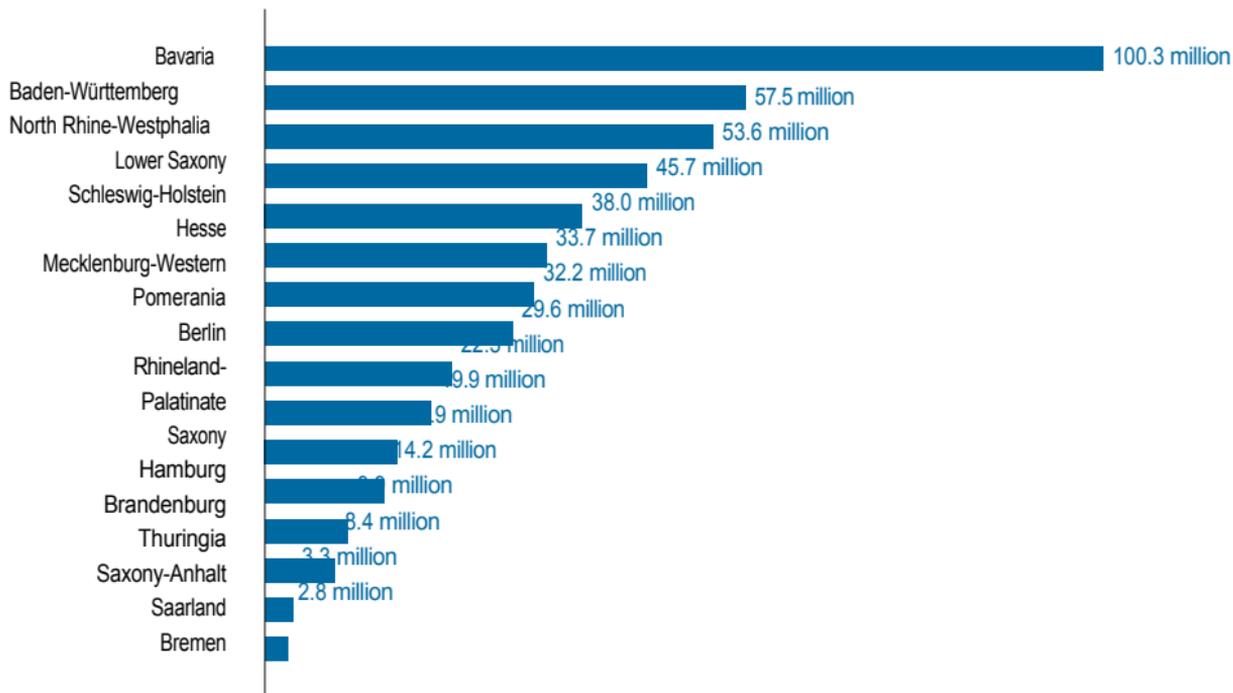
All federal states up

Change in overnight stays compared to 2022 in accommodation establishments with 10 or more beds or pitches



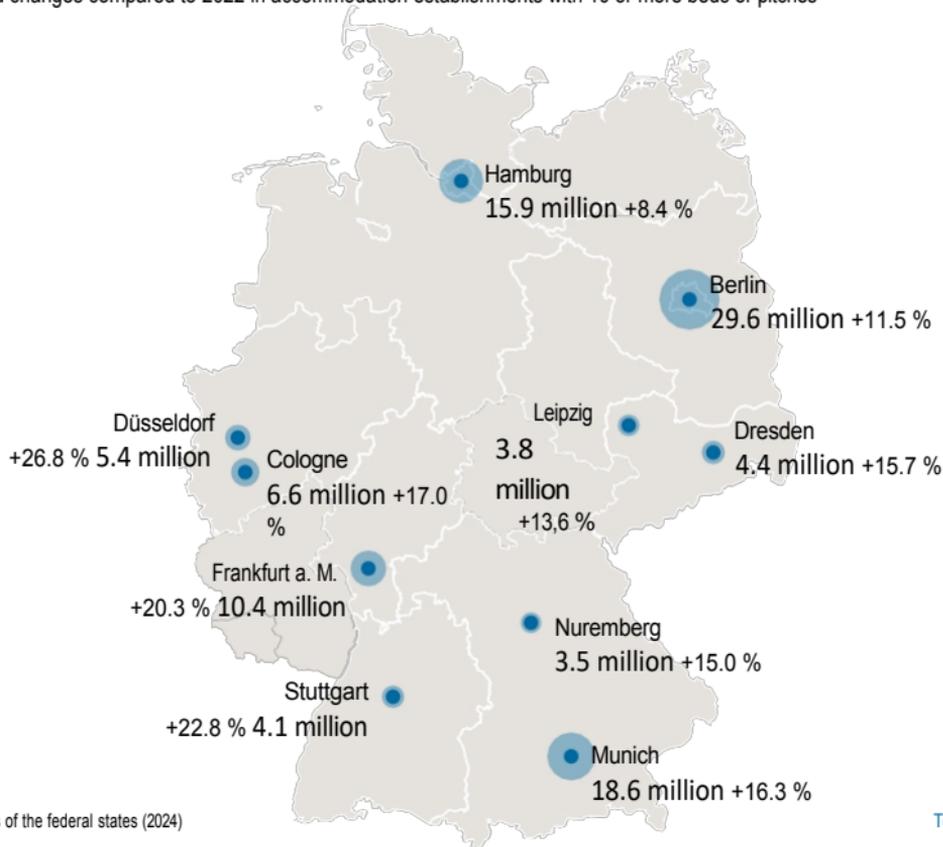
Overnight stays per federal state

Overnight stays in accommodation establishments with 10 or more beds or pitches



Major cities with the most overnight stays

Overnight stays and changes compared to 2022 in accommodation establishments with 10 or more beds or pitches

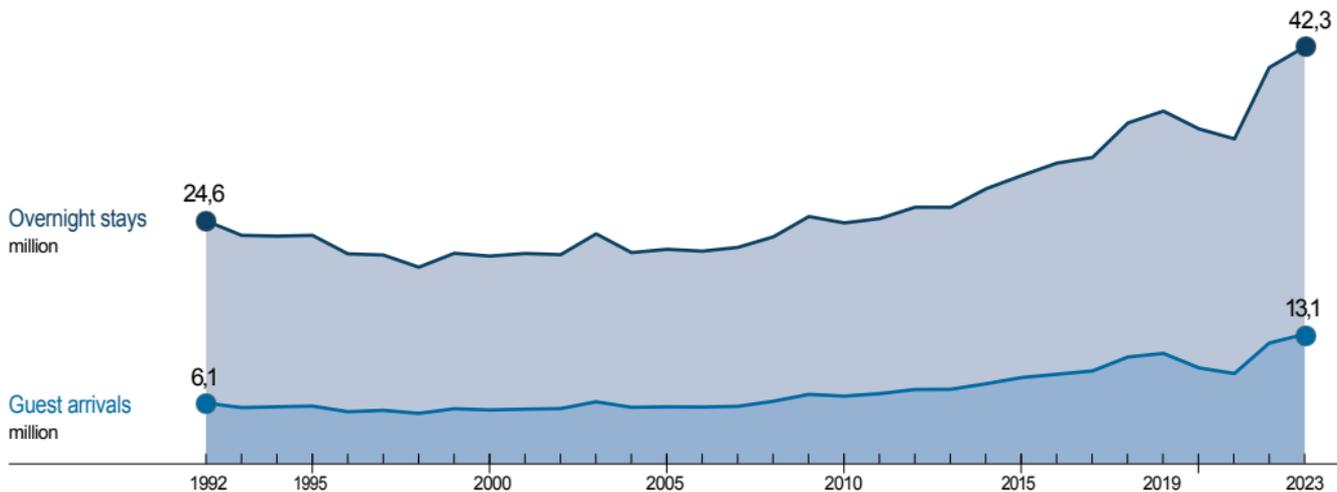


Source: Statistical offices of the federal states (2024)

Tourism to Germany 8

Camping: Second record year in a row

Development of guest arrivals and overnight stays since the start of all-German statistics*



*The figures up to 2010 refer to campsites with 3 or more pitches, from 2011 onwards to campsites with 10 or more pitches

Source: Federal Statistical Office

Vacation home market in Germany

More than 80 percent of vacation apartments and houses are not statistically recorded*

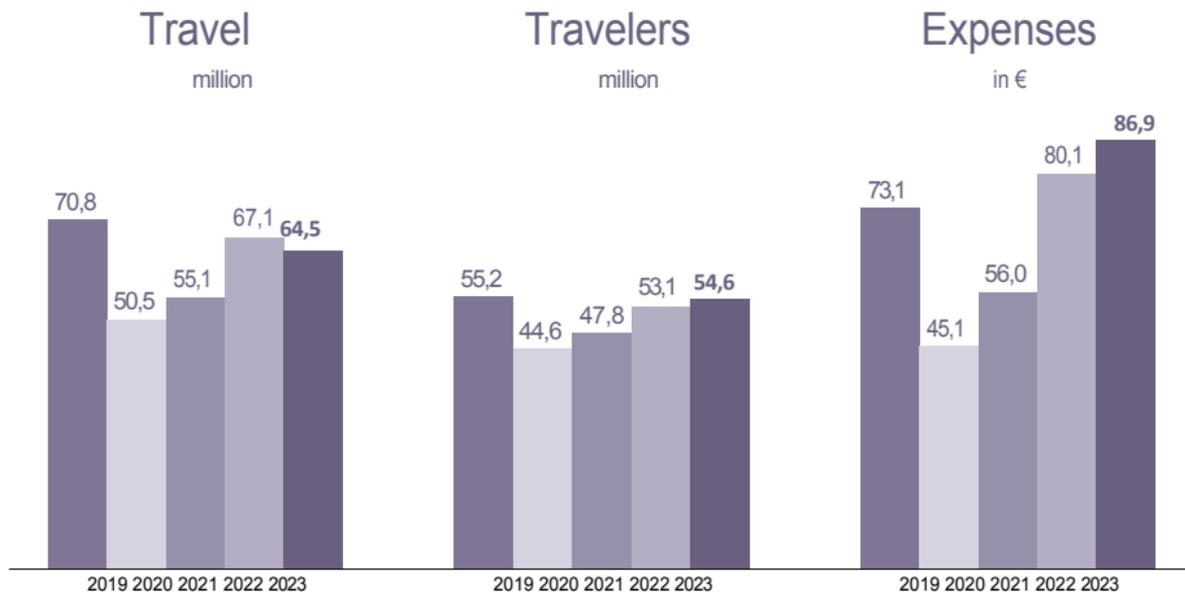


*The official accommodation statistics include accommodation establishments with 10 beds or more. The study looks at the market as a whole, including privately vacation rentals.

Source: Deutscher Ferienhausverband e.V. (2024): The vacation home market in Germany - volume and economic importance

Expenditure higher than ever before

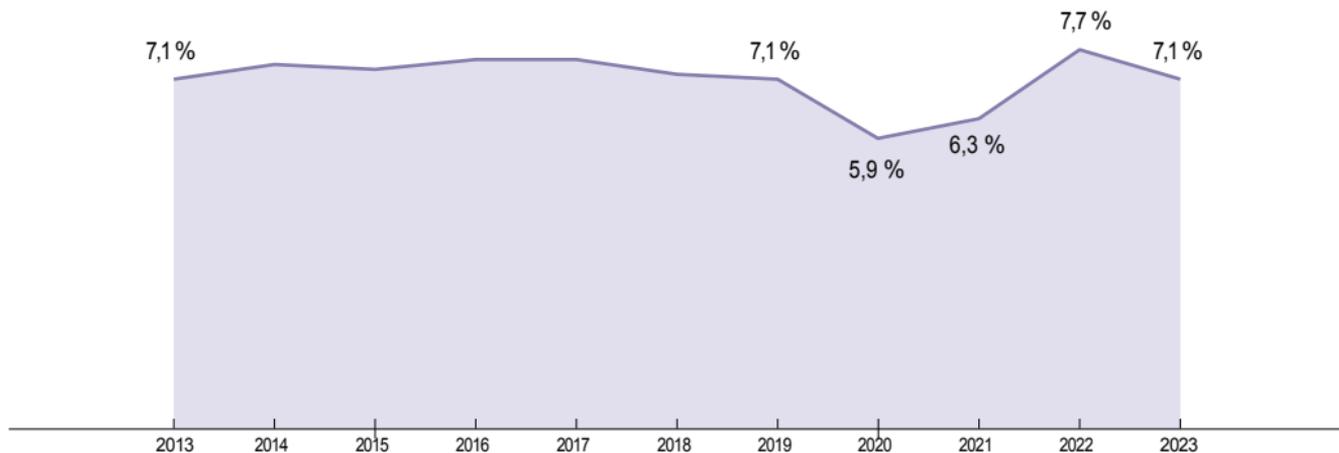
Volume of vacation trips by Germans in Germany and abroad 2019-2023*



*Vacation trips (lasting 5 days or more) of the German-speaking resident population aged 14 and over
Source: Forschungsgemeinschaft Urlaub und Reisen e.V. (2024): Travel analysis 2024

Vacation travel budget settles down

Share of vacation travel expenditure in annual net household income 2013-2023*

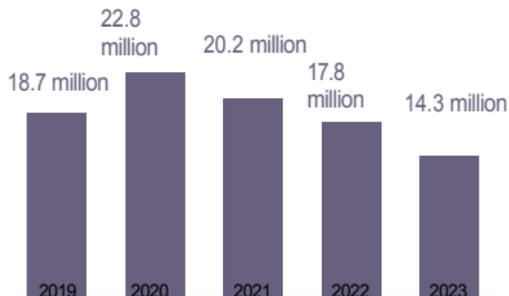


*Vacation trips (lasting 5 days or more) of the German-speaking resident population aged 14 and over
Source: Forschungsgemeinschaft Urlaub und Reisen e.V. (2024): Travel analysis 2014-2024

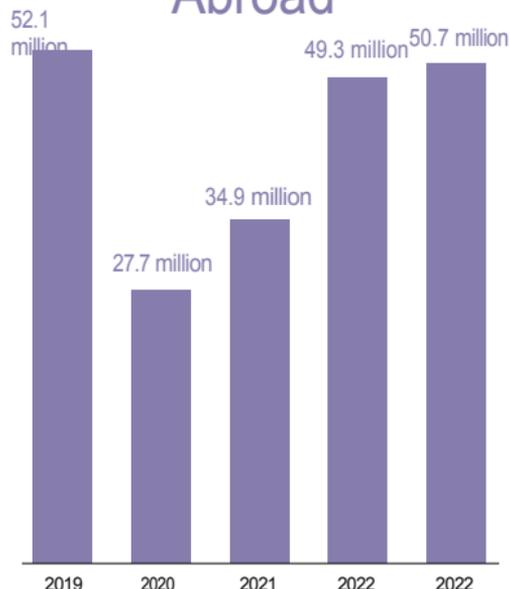
Foreign travel continues to increase

Development of vacation trips at home and abroad 2019-2023*

Domestic



Abroad



*Vacation trips (lasting 5 days or more) of the German-speaking resident population aged 14 and over
Source: Forschungsgemeinschaft Urlaub und Reisen e.V. (2024); Travel analysis 2024

Germany remains the number 1 travel destination

The most popular vacation destinations for Germans in Germany and abroad in 2023*

Top 5 worldwide



Top 5 Germany



Domestic Abroad

*Vacation trips (lasting 5 days or more) of the German-speaking resident population aged 14 and over

Source: Forschungsgemeinschaft Urlaub und Reisen e.V. (2024): Travel analysis 2024

Still fewer short breaks than in 2019

Volume of short vacation trips by Germans in Germany and abroad 2019-2023*

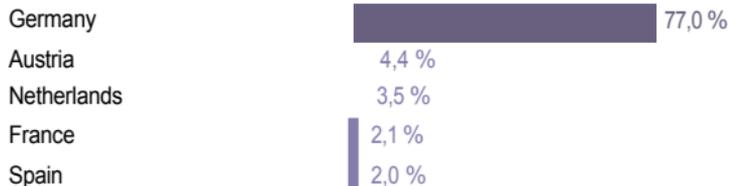


*Short vacation trips (2-4 days) of the German-speaking resident population aged 14-75 Source: Forschungsgemeinschaft Urlaub und Reisen e.V. (2024): Reiseanalyse 2024

Around three quarters of short breaks remain in Germany

The most popular short break destinations for Germans in Germany and abroad in 2023*

Top 5 worldwide



Top 5 Germany



Domestic Abroad

*1st - 3rd short vacation trip (2-4 days) of the German-speaking resident population aged 14-75 Source: Forschungsgemeinschaft Urlaub und Reisen e.V. (2024): Travel analysis 2024

The German vacation begins with the drive

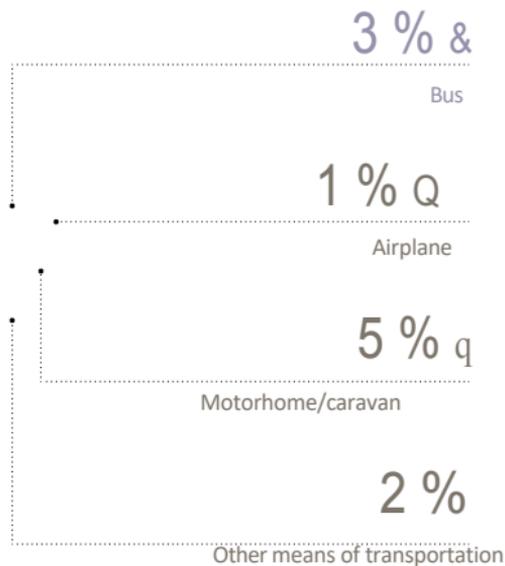
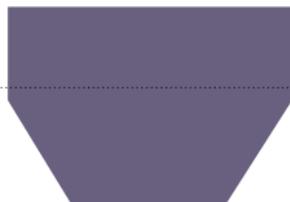
Germans' main means of transportation for domestic vacation trips¹ in 2023

17 \$

Railroad

73 % }

PASSE
NGER
CAR



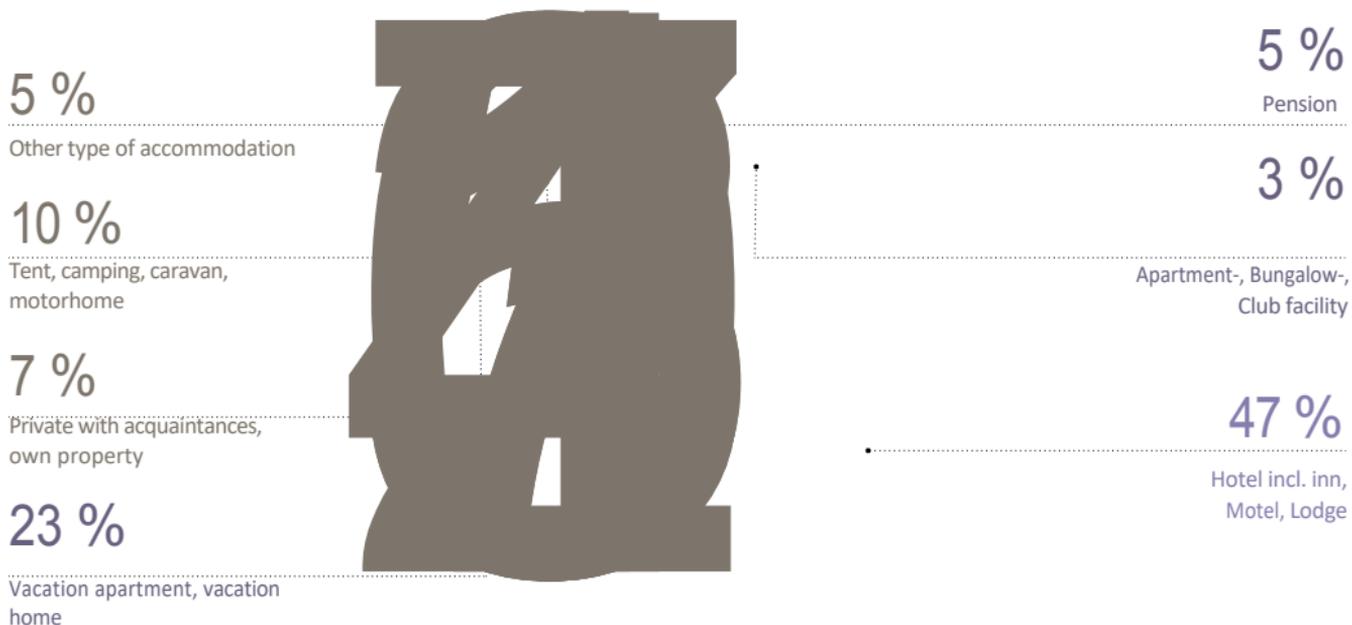
¹Domestic vacation trips from one overnight stay and 50 km from the place of residence, due to rounding

the sum of the individual values deviates from 100 %.

Source: Consumer Panel Services GfK 2024 (ed.); DestinationMonitor Germany 2023

The hotel is the most important vacation accommodation

Type of accommodation for vacation trips by Germans in Germany in 2023*

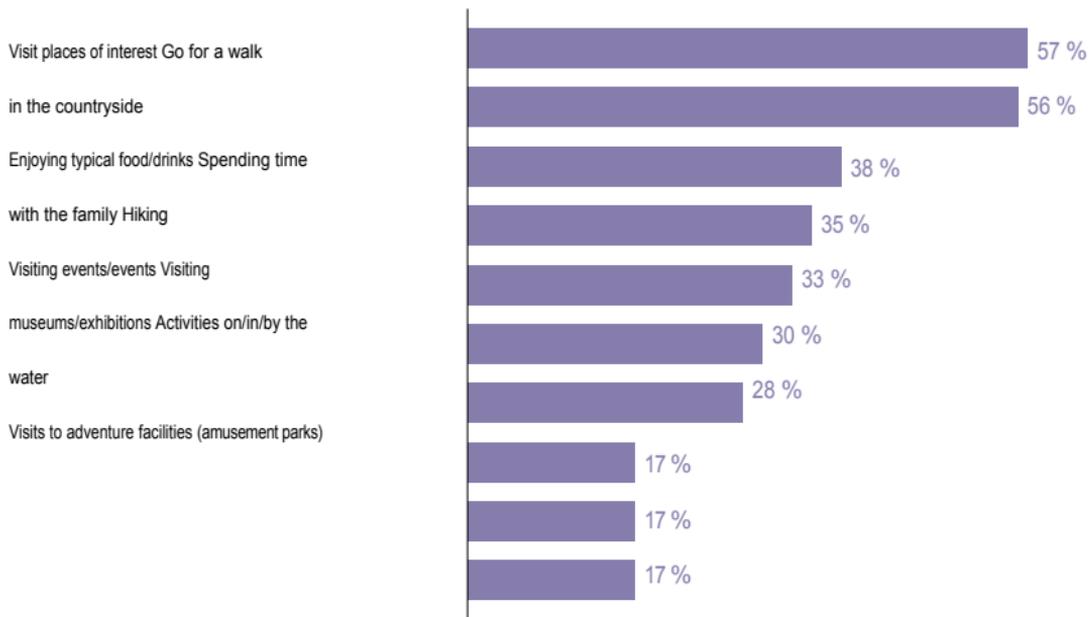


*Domestic vacation trips from one overnight stay and 50 km from the place of residence

Source: Consumer Panel Services GfK 2024 (ed.): DestinationMonitor Germany 2023

Sightseeing has the edge

Top activities of Germans on domestic vacation trips in 2023*



*Domestic vacation trips from one overnight stay and 50 km from home (multiple answers possible) Source: Consumer Panel Services GfK 2024 (ed.); DestinationMonitor Deutschland 2023

Tourism-related environmental effects in Germany

Energy consumption and greenhouse gas emissions 2019'



Energy consumption for the production of tourism-related goods and services in 2019 amounted to **298,824 terajoules**. This corresponds to **3.3 %** of the

German final energy consumption. The majority was accounted for by aviation services, followed by restaurant, road, local transport and accommodation services.

The production of goods and services in the tourism industry in 2019 caused **Greenhouse gas emissions** amounting to **24.6 million tons**

CO₂ equivalents. This corresponds to **2.6 %** of domestic Greenhouse gas emissions. Transport services accounted for a large proportion of emissions.

Sustainability has a high priority

Attitude of Germans towards sustainability when traveling (2014-2024)*

Social sustainability

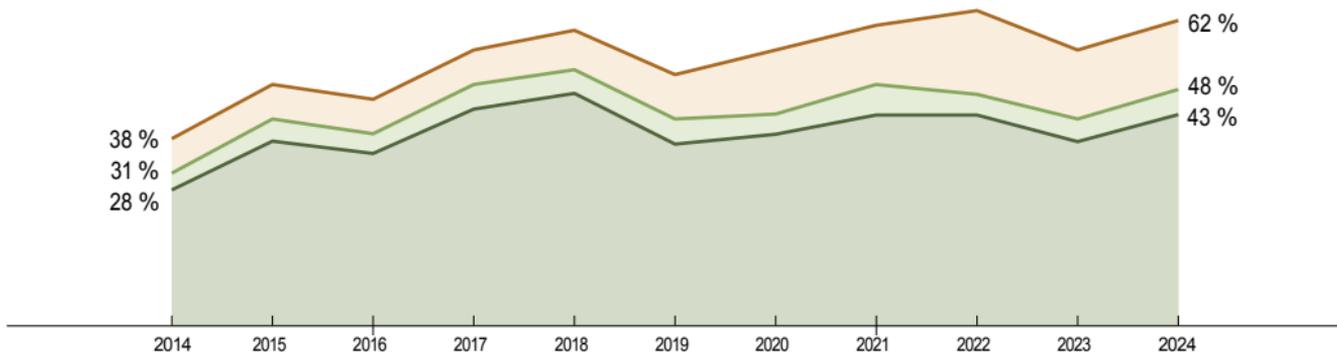
My vacation should be as socially as possible (.e. fair working conditions and respect for the population).

Ecological sustainability

My vacation should be as ecologically compatible, resource-conserving and environmentally friendly as possible.

Ecological and social sustainability

Both aspects are important.



*Persons in the German-speaking resident population aged 14 and over

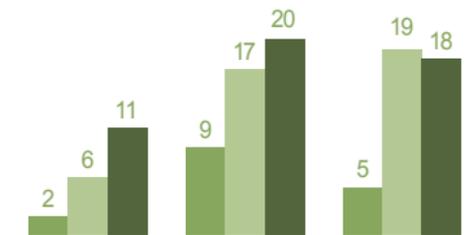
Source: Forschungsgemeinschaft Urlaub und Reisen e.V.: Travel analysis 2014 to 2024; Forschungsgemeinschaft

Urlaub und Reisen e.V. (2023): Sustainability in vacation travel: Awareness and demand development and their influencing factors (funded by the UBA with funds from the BMUV)

Sustainability: Relevance for travel decisions

Selected indicators for the sustainability of vacation and business trips*

CO₂ compensation for arrival and departure or stay
in %



2018/19

2021/22

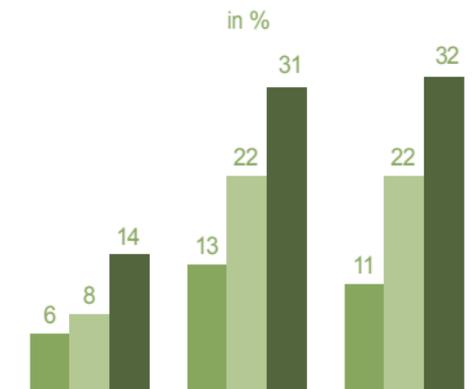
2022/23

Vacation trips

Short vacation trips

Business trips

Accommodation or tour operator with a
special eco-label or sustainability label used
in %



2018/19

2021/22

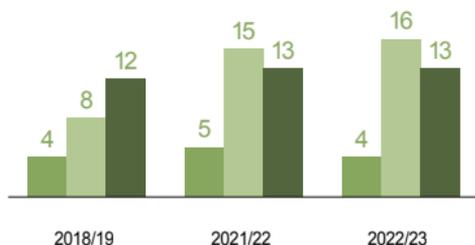
2022/23

Continued on page 23

Source: Forschungsgemeinschaft Urlaub und Reisen, FUR e.V. (2023): Sustainability in vacation travel: and demand development and their influencing factors

Sustainability was the decisive factor in the decision between otherwise equivalent offers

in %



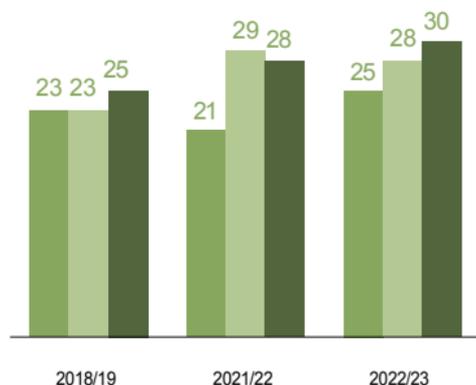
Vacation trips

Short vacation trips

Business trips

Sustainability was - among other things - an aspect in the design of the trip

in %



*Short vacation trips (2-4 days) and overnight business trips of the German-speaking resident population aged 14-75, vacation trips (from 5 days duration) of the German-speaking resident population aged 14 and over

Source: Forschungsgemeinschaft Urlaub und Reisen, FUR e.V. (2023): Sustainability in vacation travel: and demand development and their influencing factors

Tourism as an economic factor in Germany

Key economic figures for 2019



2.8 million people were directly employed in tourism in Germany in 2019.

That is **6.1%** of the total workforce in Germany.

In addition, **1.3 million** people were indirectly employed in tourism. This means that in 2019

4.1 million or **9%** of the workforce were employed on tourism.

Domestic tourism in 2019

123.8 billion euros. This corresponds to

3.99% of Germany's gross value added.

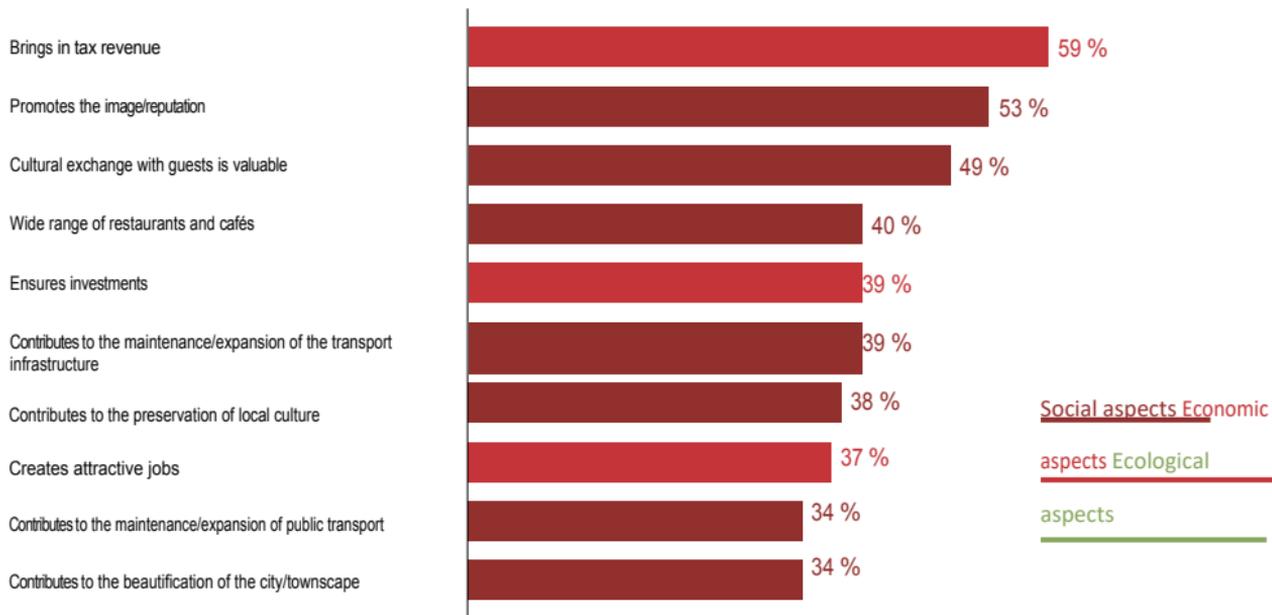
Including indirect tourism production, tourism-related gross value added increased to **EUR 216.2 billion** or **6.96%**.

Source: Federal Statistical Office (2021): Current data on the tourism industry, economic importance and

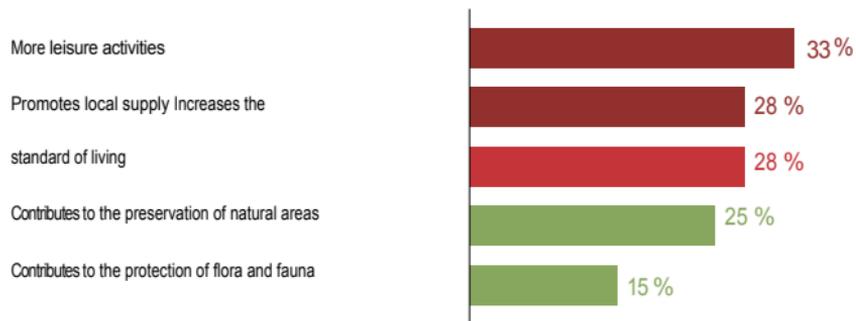
Sustainability. The figures relate to 2019.

Positive effects of tourism

Perceived positive effects on own place of residence - approval ratings of locals*

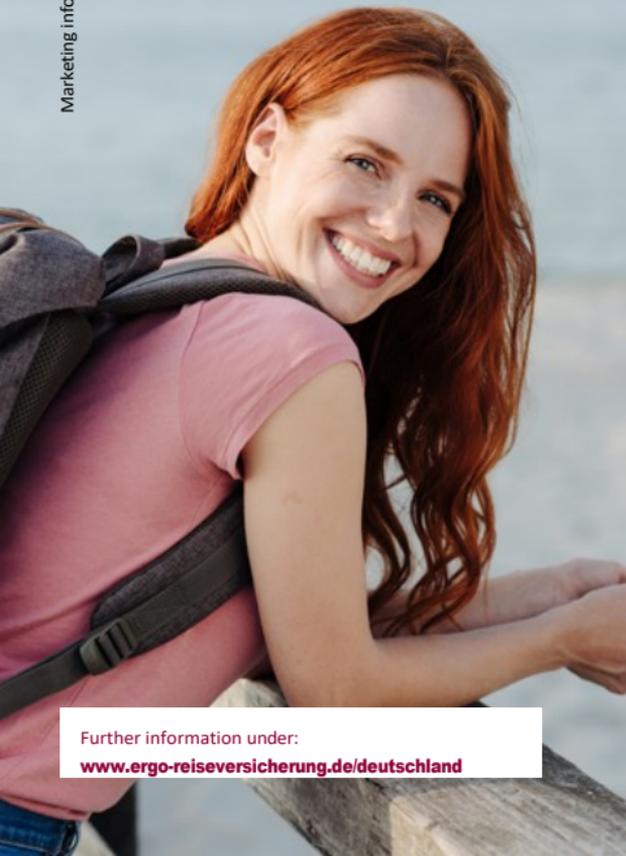


Continued on page 26



Social aspects Economic aspects
Ecological aspects

*Hybrid survey of the German-speaking resident population aged 16 and over (n= 11,950), survey wave May - August 2023; question: "We have listed various statements on tourism below. indicate to what extent you agree with these statements in relation to [place of residence] in the current situation."; The top 2 box values "strongly agree" and "agree" are shown in each case.



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- Reduction in legal costs in the event of cancellation, as there are no more goodwill
- Additional source of income through attractive commissions

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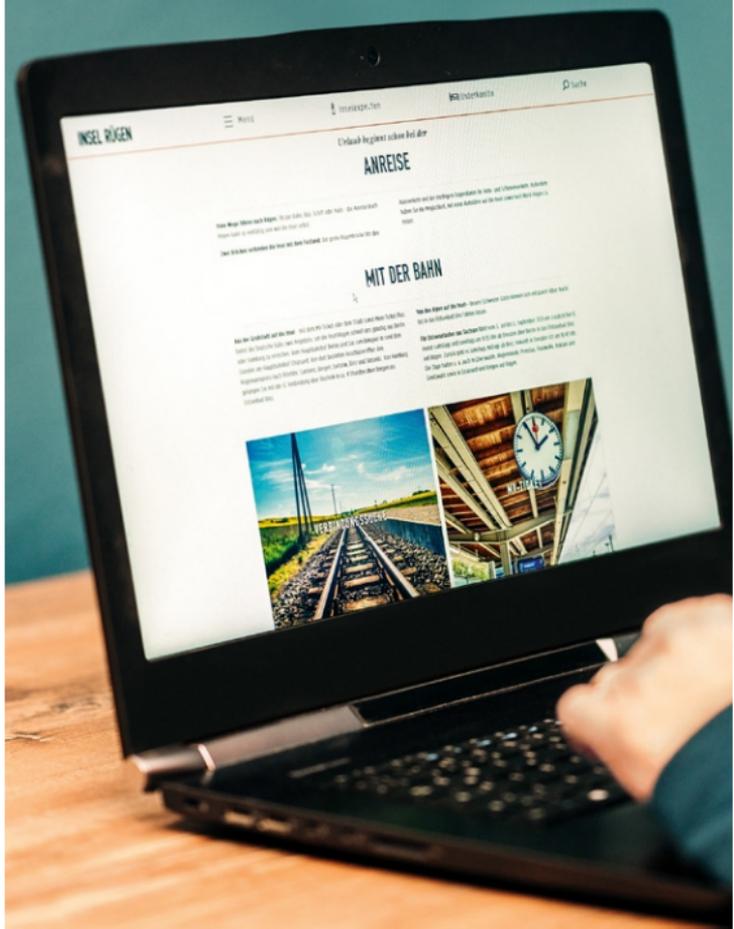


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We make tourism strong. In Germany.

The German Tourism Association (DTV) has represented the interests of the tourism organizations of the federal states, regions and towns in Germany since 1902. Its primary objectives are to strengthen tourism as an economic factor and to develop a needs-based tourism infrastructure and forward-looking, sustainable quality tourism in Germany. The DTV represents the interests of its members vis-à-vis politicians and authorities, initiates projects, promotes exchange and networking within the industry and further develops tourism quality systems.



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