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INCOMING ROMANIA

COUNTRY AND PEOPLE

Capital	Bucharest (1.8 million inhabitants)
Area	238,391 km ²
Inhabitants	2023: 19.9 million (growth rate 1.2%)*; Forecast 2032: 18.9 million
Mean age	45.1 years*
Economy	GDP per capita: 18,414 Euro (2023)*, GDP – real growth rate: +2.2% (2023)*
Unemployment rate	5.4% (2023)*
Inflation rate	9.8% (2023)*

* Forecast

GENERAL TRAVEL BEHAVIOUR 2023

DESTINATIONS OF TRIPS ABROAD

Rank

- 1 Greece
- 2 Italy
- 3 Turkey

4 Germany

INTENSITY OF TRAVEL ABROAD

50.3%

(resident population from 15 years on)

= 0.5 trips per person

DESTINATION GERMANY

YEAR 2023

351,547 arrivals from Romania

1,371,280 overnight stays (camping included)

VOLUME OF OVERNIGHT STAYS

Increase 2014–2023: **by +88.2%**

Growth 2022–2023: **+13.1%**

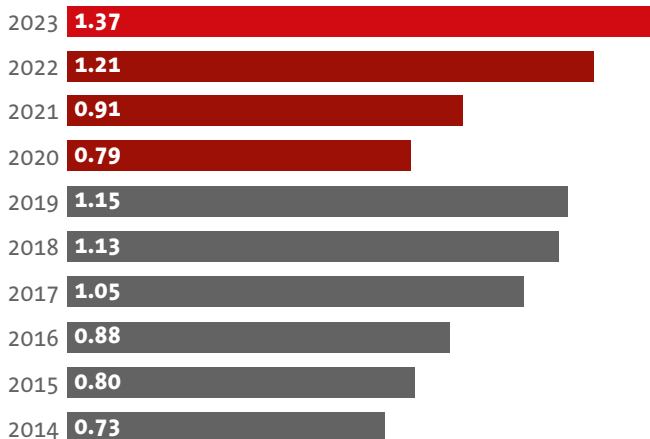
Recovery to 2019: **119.6%**

TOTAL SALES TURNOVER FOR INCOMING TRIPS

round **0.5 billion Euro** (2023)

OVERNIGHT STAYS – CURRENT AND LONG-TERM DEVELOPMENT IN MILLIONS

Year



MOST POPULAR DESTINATIONS IN 2023

RANK	FEDERAL STATES (Overnight stays = o. s.)	CITIES (more than 100,000 inhabitants)
1	Bavaria with 31.2% of all o. s.	Munich with 100,229 o. s.
2	Baden-Württemberg with 17.0% of all o. s.	Berlin with 85,506 o. s.
3	North Rhine-Westphalia with 11.0% of all o. s.	Frankfurt with 60,286 o. s.
4	Hesse with 10.9% of all o. s.	Hamburg with 48,832 o. s.

PURPOSE OF ALL INCOMING TRIPS

Only one answer possible. Deviations from 100% due to rounding

54 % Holiday trips

Type of holiday trip:

44 % City trips/visit of an event

22 % Holidays in tourist regions

17 % Tour holidays



24 % Business trips

Type of business trip:

53 % Traditional business trips

47 % Promotable business trips

Type of promotable business trip:

73 % Conferences/congresses/seminars

16 % Incentives

10 % Exhibits/trade fairs

22 % VFR-/other trips

BOOKING-BEHAVIOUR, MAIN MODE OF TRANSPORT, ACCOMMODATION DURING HOLIDAY TRIPS

82 % of all holiday trips are
booked in advance

76 % online booking

74 % accommodation paid for
(48% hotel)



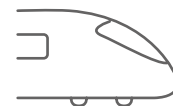
45 %
plane



44 %
car



8 %
coach



1 %
train

INCOMING SERBIA

COUNTRY AND PEOPLE

Capital	Belgrade (1.4 million inhabitants)
Area	77,474 km ²
Inhabitants	2023: 7.1 million (growth rate – 1.0%)*; Forecast 2032: 6.7 million
Mean age	43.7 years
Economy	GDP per capita: 11,302 US\$ (2023)*, GDP – real growth rate: + 2.0% (2023)*
Unemployment rate	9.1% (2023)*
Inflation rate	12.4% (2023)*

* Forecast

GENERAL TRAVEL BEHAVIOUR 2023

DESTINATIONS OF TRIPS ABROAD

Rank

- 1 Greece
- 2 Montenegro
- 3 Italy
- 4 Croatia

8 Germany

INTENSITY OF TRAVEL ABROAD

72.8%

(resident population from 15 years on)

= 0.7 trips per person

PURPOSE OF ALL INCOMING TRIPS

Only one answer possible. Deviations from 100 % due to rounding

35 % Holiday trips

Type of holiday trip:

59 % City trips/visit of an event

16 % Tour holidays

13 % Holidays in tourist regions

38 % VFR-/other trips

27 % Business trips

Type of business trip:

56 % Promotable business trips

Type of promotable business trip:

76 % Conferences/congresses/seminars

14 % Incentives

14 % Exhibits/trade fairs

44 % Traditional business trips

BOOKING-BEHAVIOUR, MAIN MODE OF TRANSPORT, ACCOMMODATION DURING HOLIDAY TRIPS

82 % of all holiday trips are booked in advance

70 % online booking

52 % accommodation paid for (25 % hotel)



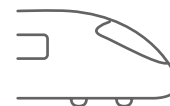
38 %
car



37 %
plane



18 %
coach



7 %
train

INCOMING BULGARIA

COUNTRY AND PEOPLE

Capital	Sofia (1.3 million inhabitants)
Area	110,879 km ²
Inhabitants	2023: 6.7 million (growth rate –1.4%)*; Forecast 2032: 6.2 million
Mean age	44.7 years*
Economy	GDP per capita: 16,087 US\$ (2023)*, GDP – real growth rate: +2.0% (2023)*
Unemployment rate	4.2% (2023)*
Inflation rate	8.8% (2023)*

* Forecast

GENERAL TRAVEL BEHAVIOUR 2023

DESTINATIONS OF TRIPS ABROAD

Rank

- 1 Greece
- 2 Turkey
- 3 Germany**
- 4 Romania

INTENSITY OF TRAVEL ABROAD

117.9%

(resident population from 15 years on)

= 1.0 trips per person

DESTINATION GERMANY

YEAR 2023

137,795 arrivals from Bulgaria

463,982 overnight stays (camping included)

VOLUME OF OVERNIGHT STAYS

Increase 2014–2023: **by +68.2%**

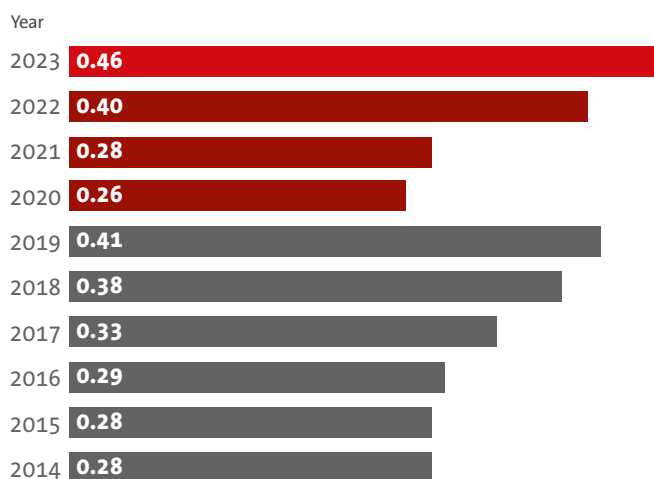
Growth 2022–2023: **+15.4%**

Recovery to 2019: **114.1%**

TOTAL SALES TURNOVER FOR INCOMING TRIPS

round **0.3 billion Euro** (2023)

OVERNIGHT STAYS – CURRENT AND LONG-TERM DEVELOPMENT IN MILLIONS



MOST POPULAR DESTINATIONS IN 2023

RANK	FEDERAL STATES (Overnight stays = o. s.)	CITIES (more than 100,000 inhabitants)
1	Bavaria with 29.4% of all o. s.	Munich with 47,220 o. s.
2	Baden-Württemberg with 14.1% of all o. s.	Berlin with 39,075 o. s.
3	North Rhine-Westphalia with 11.6% of all o. s.	Frankfurt with 25,389 o. s.
4	Hesse with 10.9% of all o. s.	Hamburg with 16,117 o. s.

PURPOSE OF ALL INCOMING TRIPS (138 thousand arrivals at lodging establishments)

Only one answer possible. Deviations from 100% due to rounding

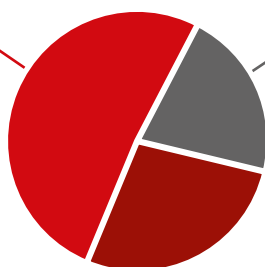
51 % Holiday trips

Type of holiday trip:

39 % City trips/visit of an event

30 % Tour holidays

17 % Holidays in tourist regions



21 % Business trips

Type of business trip:

53 % Traditional business trips

47 % Promotable business trips

Type of promotable business trip:

64 % Conferences/congresses/seminars

24 % Incentives

12 % Exhibits/trade fairs

27 % VFR-/other trips

BOOKING-BEHAVIOUR, MAIN MODE OF TRANSPORT, ACCOMMODATION DURING HOLIDAY TRIPS

87 % of all holiday trips are
booked in advance

84 % online booking

74 % accommodation paid for
(46 % hotel)



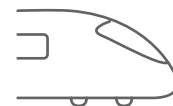
54 %
plane



34 %
car



7 %
coach



3 %
train

INCOMING CROATIA

COUNTRY AND PEOPLE

Capital	Zagreb (684,000 inhabitants)
Area	88,070 km ²
Inhabitants	2023: 4.0 million (growth rate – 0.5%)*; Forecast 2032: 3.8 million
Mean age	44.8 years*
Economy	GDP per capita: 22,515 Euro (2023), GDP – real growth rate: +2.6% (2023)*
Unemployment rate	6.5% (2023)*
Inflation rate	8.1% (2023)*

* Forecast

GENERAL TRAVEL BEHAVIOUR 2023

DESTINATIONS OF TRIPS ABROAD

Rank

1 Germany

2 Italy

3 Austria

4 Bosnia and Herzegovina

INTENSITY OF TRAVEL ABROAD

82.6%

(resident population from 15 years on)

= 0.8 trips per person

DESTINATION GERMANY

YEAR 2023

147,094 arrivals from Croatia

576,348 overnight stays (camping included)

VOLUME OF OVERNIGHT STAYS

Increase 2014–2023: **by +195.1%**

Growth 2022–2023: **+13.5%**

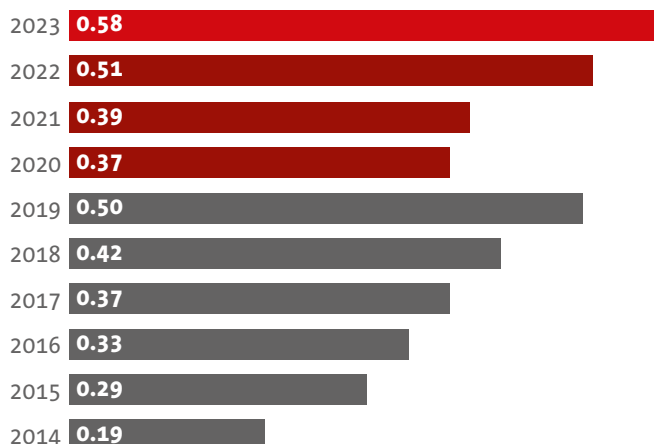
Recovery to 2019: **114.5%**

TOTAL SALES TURNOVER FOR INCOMING TRIPS

round **0.6 billion Euro** (2023)

OVERNIGHT STAYS – CURRENT AND LONG-TERM DEVELOPMENT IN MILLIONS

Year



MOST POPULAR DESTINATIONS IN 2023

RANK	FEDERAL STATES (Overnight stays = o. s.)	CITIES (more than 100,000 inhabitants)
1	Bavaria with 39.6% all o. s.	Munich with 81,381 o. s.
2	Baden-Württemberg with 17.9% all o. s.	Berlin with 35,455 o. s.
3	North Rhine-Westphalia with 10.7% all o. s.	Frankfurt with 17,015 o. s.
4	Hesse with 8.9% all o. s.	Düsseldorf with 14,145 o. s.

PURPOSE OF ALL INCOMING TRIPS (147 thousand arrivals at lodging establishments)

Only one answer possible. Deviations from 100% due to rounding

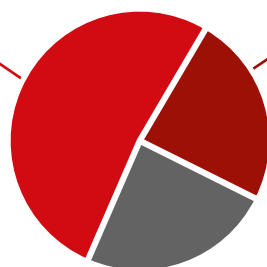
52 % Holiday trips

Type of holiday trip:

50 % City trips/visit of an event

17 % Holidays in tourist regions

10 % Tour holidays



24 % Business trips

Type of business trip:

53 % Promotable business trips

Type of promotable business trip:

55 % Conferences/congresses/seminars

33 % Exhibits/trade fairs

12 % Incentives

47 % Traditional business trips

24 % VFR-/other trips

BOOKING-BEHAVIOUR, MAIN MODE OF TRANSPORT, ACCOMMODATION DURING HOLIDAY TRIPS

72 % of all holiday trips are
booked in advance

56 % online booking

55 % accommodation paid for
(28% hotel)



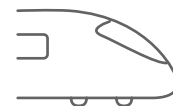
49 %
car



25 %
plane



21 %
coach



3 %
train

INCOMING BOSNIA AND HERZEGOVINA

COUNTRY AND PEOPLE

Capital	Sarajevo (346,000 inhabitants)
Area	51,210 km ²
Inhabitants	2023: 3.2 million (growth rate -0.7%)*; Forecast 2032: 3.1 million
Mean age	44.4 years*
Economy	GDP per capita: 7,082 US\$ (2023)*, GDP – real growth rate: +2.0% (2023)*
Unemployment rate	17.2% (2023)*
Inflation rate	4.5% (2023)*

* Forecast

GENERAL TRAVEL BEHAVIOUR 2023

DESTINATIONS OF TRIPS ABROAD

Rank

- 1 Montenegro
- 2 Croatia
- 3 Germany**
- 4 Italy

INTENSITY OF TRAVEL ABROAD

68.1%

(resident population from 15 years on)

= **0.7** trips per person

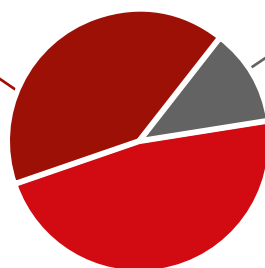
PURPOSE OF ALL INCOMING TRIPS

Only one answer possible. Deviations from 100% due to rounding

41% Holiday trips

Type of holiday trip:

- 31% Tour holidays**
- 25% City trips/visit of an event**
- 16% Holidays in tourist regions**



47% VFR-/other trips

12% Business trips

Type of business trip:

- 76% Traditional business trips**
- 24% Promotable business trips**

Type of promotable business trip:
75% Conferences/congresses/seminars
13% Exhibits/trade fairs
13% Incentives

BOOKING-BEHAVIOUR, MAIN MODE OF TRANSPORT, ACCOMMODATION DURING HOLIDAY TRIPS

66% of all holiday trips are
booked in advance

50% online booking

34% accommodation paid for
(16% hotel)



40%
car



30%
coach



28%
plane

INCOMING MONTENEGRO

COUNTRY AND PEOPLE

Capital	Podgorica (180,000 inhabitants)
Area	13,810 km ²
Inhabitants	2023: 0.6 million (growth rate –0.1%)*; Forecast 2032: 0.6 million
Mean age	40.7 years*
Economy	GDP per capita: 10,729 US\$ (2023)*, GDP – real growth rate: +4.2% (2023)*
Unemployment rate	16.6% (2023)*
Inflation rate	3.8% (2023)*

* Forecast

References: World Travel Monitor 2023, IPK International 2024;
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