



**Euromonitor
International**

Booking in Germany

September 2025

Table of Contents

EXECUTIVE SUMMARY

Travel in 2025: The Big Picture

Airlines: Key trends

Hotels: Key trends

Booking: Key trends

What next for travel?

MARKET DATA

Table 1 - Surface Travel Modes Sales: Value 2020-2025

Table 2 - Surface Travel Modes Online Sales: Value 2020-2025

Table 3 - Forecast Surface Travel Modes Sales: Value 2025-2030

Table 4 - Forecast Surface Travel Modes Online Sales: Value 2025-2030

Table 5 - In-Destination Spending: Value 2020-2025

Table 6 - Forecast In-Destination Spending: Value 2025-2030

DISCLAIMER

SOURCES

Summary 1 - Research Sources

KEY DATA FINDINGS

2025 DEVELOPMENTS

Inbound arrivals growth begins to moderate

Strong demand for outbound travel fuelled by desire for experiences

PROSPECTS AND OPPORTUNITIES

Germany's diverse tourism offering to fuel inbound arrivals growth

Keen desire to travel abroad will sustain outbound departures

CATEGORY DATA

Table 7 - Inbound Arrivals: Number of Trips 2020-2025

Table 8 - Inbound Arrivals by Country: Number of Trips 2020-2025

Table 9 - Inbound City Arrivals 2020-2025

Table 10 - Inbound Tourism Spending: Value 2020-2025

Table 11 - Forecast Inbound Arrivals: Number of Trips 2025-2030

Table 12 - Forecast Inbound Arrivals by Country: Number of Trips 2025-2030

Table 13 - Forecast Inbound Tourism Spending: Value 2025-2030

Table 14 - Domestic Tourism by Destination: Number of Trips 2020-2025

Table 15 - Domestic Spending: Value 2020-2025

Table 16 - Forecast Domestic Tourism by Destination: Number of Trips 2025-2030

Table 17 - Forecast Domestic Spending: Value 2025-2030

Table 18 - Outbound Departures: Number of Trips 2020-2025

Table 19 - Outbound Departures by Destination: Number of Trips 2020-2025

Table 20 - Outbound Tourism Spending: Value 2020-2025

Table 21 - Forecast Outbound Departures: Number of Trips 2025-2030

Table 22 - Forecast Outbound Departures by Destination: Number of Trips 2025-2030

Table 23 - Forecast Outbound Spending: Value 2025-2030

KEY DATA FINDINGS

2025 DEVELOPMENTS

Higher cost of air travel weighs on category performance

Deutsche Lufthansa AG retains its leading position despite turbulence

PROSPECTS AND OPPORTUNITIES

Consumers will prioritise price when travelling even as sustainability gains importance

Generative AI will elevate the customer experience without adding costs

CATEGORY DATA

Table 24 - Airlines Sales: Value 2020-2025

Table 25 - Airlines Online Sales: Value 2020-2025

Table 26 - Airlines: Passengers Carried 2020-2025

Table 27 - Airlines NBO Company Shares: % Value 2020-2024

Table 28 - Non-Scheduled Carriers Brands by Key Performance Indicators 2025

Table 29 - Low Cost Carriers Brands by Key Performance Indicators 2025

Table 30 - Full Service Carriers Brands by Key Performance Indicators 2025

Table 31 - Forecast Airlines Sales: Value 2025-2030

Table 32 - Forecast Airlines Online Sales: Value 2025-2030

KEY DATA FINDINGS

2025 DEVELOPMENTS

Lodging (destination) shows resilience due to cautious spending behaviour

Polarisation is more evident in the hotel industry

PROSPECTS AND OPPORTUNITIES

Short-term rentals to gain traction in Germany

Lodgings to address sustainability and embrace AI

CATEGORY DATA

Table 33 - Lodging (Destination) Sales: Value 2020-2025

Table 34 - Lodging (Destination) Online Sales: Value 2020-2025

Table 35 - Hotels Sales: Value 2020-2025

Table 36 - Hotels Online Sales: Value 2020-2025

Table 37 - Other Lodging Sales: Value 2020-2025

Table 38 - Other Lodging Online Sales: Value 2020-2025

Table 39 - Lodging (Destination) Outlets: Units 2020-2025

Table 40 - Lodging (Destination) Rooms: Number of Rooms 2020-2025

Table 41 - Lodging (Destination) by Incoming vs Domestic: % Value 2020-2025

Table 42 - Hotels NBO Company Shares: % Value 2020-2024

Table 43 - Hotel Brands by Key Performance Indicators 2025

Table 44 - Forecast Lodging (Destination) Sales: Value 2025-2030

Table 45 - Forecast Lodging (Destination) Online Sales: Value 2025-2030

Table 46 - Forecast Hotels Sales: Value 2025-2030

Table 47 - Forecast Hotels Online Sales: Value 2025-2030

Table 48 - Forecast Other Lodging Sales: Value 2025-2030

Table 49 - Forecast Other Lodging Online Sales: Value 2025-2030

Table 50 - Forecast Lodging (Destination) Outlets: Units 2025-2030

KEY DATA FINDINGS

2025 DEVELOPMENTS

Bookings growth slows amid cautious spending behaviour

Major players consolidate their position in bookings

PROSPECTS AND OPPORTUNITIES

Sustainability agenda poses challenges for the booking industry
Technology offers opportunities for travel intermediaries to adapt

CATEGORY DATA

Table 51 - Booking Sales: Value 2020-2025

Table 52 - Business Travel Sales: Value 2020-2025

Table 53 - Leisure Travel Sales: Value 2020-2025

Table 54 - Travel Intermediaries NBO Company Shares: % Value 2020-2025

Table 55 - Forecast Booking Sales: Value 2025-2030

Table 56 - Forecast Business Travel Sales: Value 2025-2030

Table 57 - Forecast Leisure Travel Sales: Value 2025-2030

[Travel in Germany - Industry Overview](#)

EXECUTIVE SUMMARY

Travel in 2025: The Big Picture

Airlines: Key trends

Hotels: Key trends

Booking: Key trends

What next for travel?

MARKET DATA

Table 58 - Surface Travel Modes Sales: Value 2020-2025

Table 59 - Surface Travel Modes Online Sales: Value 2020-2025

Table 60 - Forecast Surface Travel Modes Sales: Value 2025-2030

Table 61 - Forecast Surface Travel Modes Online Sales: Value 2025-2030

Table 62 - In-Destination Spending: Value 2020-2025

Table 63 - Forecast In-Destination Spending: Value 2025-2030

DISCLAIMER

SOURCES

Summary 2 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/booking-in-germany/report.