

# Travel Trade Key Insights

**Markets: Germany-Switzerland-Austria**

January 2026

**Visit Sweden**



# Germany





# Overview Germany



## Market

83,5 Mio inhabitants/ 236 per km<sup>2</sup>

11,8 Mio families with kids

42% single-person households

33% two-person households

50% older then 45 years

20% older then 66 years

3.074 EUR average net household income

16 federal states

TOP3 by inhabitants: North Rhine-Westphalia, Bayern, Baden-Württemberg

various times for school holidays in all federal states

Source



## Travel Trade

68,3 Mio holiday trips more than 5 days (2024)/ 23,6% within Germany

80% travel intensity (people who travel)

around 2.300 Tour operators

around 8.000 travel agencies

50% booking travel packages via Tour operators/ travel agencies

examples tour operators: TUI, DERTOUR, Aida Cruises, Schauinsland Reisen, Alltours

Source



Alexander Hall/imagebank.sweden.se

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# Overview Germany



## Target group: Global travellers

27 million German global travellers with an interest in Sweden

holiday travel and environmental concerns:

- ✓ avoiding crowded places
- ✓ train before plane if possible
- ✓ cycle/ e-bike or walk
- ✓ travelling outside the destination's high season
- ✓ locally produced and organic food



## General thoughts & values

My family is the most important thing in my life

Protecting the environment is important to me.

Having a good time is important.

I think everyone should have the same fair opportunities in life.

A healthy lifestyle is important to me.



## Reasons for a holiday in Sweden

- ✓ Experiencing nice nature
- ✓ relaxing
- ✓ experience new cities and places
- ✓ enjoying peace and quiet
- ✓ Increase well-being

## Reasons for well-being during that stay

- ✓ fresh air (72%)
- ✓ closeness to nature (70%)
- ✓ Swedish lifestyle & culture (55%)
- ✓ quality time with people joining (54%)
- ✓ local food & drinks (48%)

# Overview Germany



## Travel to Sweden

**3,57 Mio overnight stays** in 2024  
(+30% since 2008/ +5% from 2023)

41% Camping

33% Hotel

21% holiday cottages and apartments

**28%** of all overnight stays from German guests **travelling “North”** are going to **Sweden**

around **68%** of all overnight stays take place **between June and August**  
(+3% from 2023)

more than **55%** staying **5 nights or longer**

**TOP5 regions:** Stockholm, West Sweden with Gothenburg, Skåne, Kalmar + Öland, South of Småland (Kronoberg)

[Source](#)



## Travel to Sweden

59% with my partner

22% kids between 6-10 years

22% kids between 11-18 years

16% kids between 0-5 years

14% Friends

14% alone

7% parents/ grandparents

6% other relatives

6% kids older than 18 years

[Source](#)



## Travel to Sweden

42% car

28% flight

22% ferry with own car/ vehicle

21% campervan

20% train

18% buss

12% caravan

10% bicycle

9% motorbike

# Overview Germany



## Type of trip to Sweden

1. Citybreak/ -trip
2. Trip with focus on outdoor- and nature experiences
3. Beach/ nature holiday
4. Round trip (with accommodation in several places)
5. Trip with focus culinary aspects
6. Family holiday
7. Culture/ Sightseeing trip



## Knowledge about Sweden as a travel destination

56% knowing  
19% high knowing

### Interest to travel to Sweden:

47% not visited yet but interested to go  
40% visited and interested to go again



## Booking Sweden

38% want to book a **package**  
incl. transportation  
+13% want to book a **package**  
without transportation

47% want to book their Sweden  
package via personal contact with a  
travel agency/ tour operator

*“Why a package? Because it is  
convenient, easy to use, has better  
protection and it feels good to rely on  
experts.”*

39% wants to book transportation  
35% wants to book an accommodation



## Search about Sweden

- ✓ Website/ App from big travel platforms
- ✓ free google search for destination
- ✓ recommendations from family & friends
- ✓ Website/ App from national tourist board
- ✓ Reviews from other travellers on platforms
- ✓ Websites/ Apps from suppliers
- ✓ Travel blogs
- ✓ Guidebooks, brochures etc.
- ✓ Website/ Apps from travel agencies/ tour operator
- ✓ Wikipedia
- ✓ Video platforms
- ✓ Travel magazines
- ✓ Instagram/ Facebook

# Overview Germany

Important factors influencing the choice of Sweden as a travel destination, e.g.

- exceptionally beautiful nature
- Have been there and liked it very much
- interesting cultural attractions and places to visit
- Experiences and activities
- Feel safe and secure
- Sweden takes care of it's nature and inhabitants
- Sweden feels different
- Recommendation of family/ friends
- overall value for money

Source



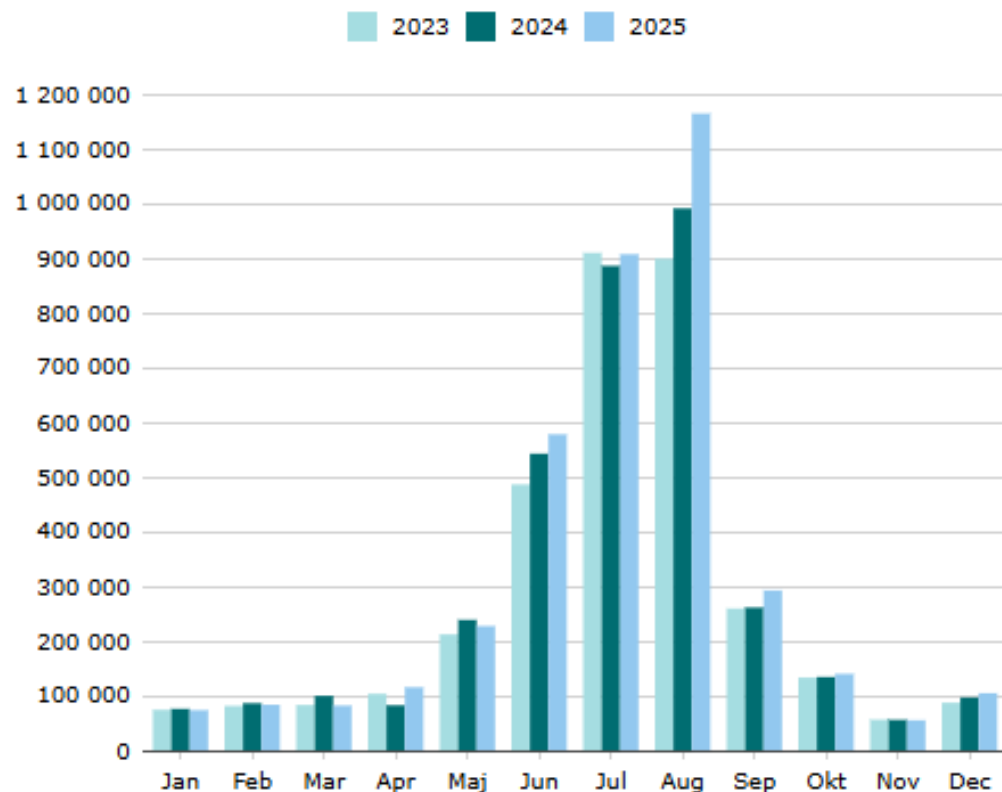
Roger Borgelid/imagebank.sweden.se

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# Guestnights 2023/ 2024/ 2025 – Germany

## Gästnätter per månad



## January – December 2023

**3 412 010 st**

Total antal gästnätter, 2023-01 - 2023-12

**+282 773 st** **+9,0%**

Utveckling jämfört med föregående period,  
2022-01 - 2022-12

## January – December 2024

**3 577 578 st**

Total antal gästnätter, 2024-01 - 2024-12

**+165 568 st** **+4,9%**

Utveckling jämfört med föregående period,  
2023-01 - 2023-12

## January – December 2025

**3 850 331 st**

Total antal gästnätter, 2025-01 - 2025-12

**+272 753 st** **+7,6%**

Utveckling jämfört med föregående period,  
2024-01 - 2024-12



# Switzerland



# Overview Switzerland



## Market

9 Mio inhabitants/ 215 per km<sup>2</sup>

37% single-person households

33% two-person households

average age 42 years

20% older than 65 years

6.902 CHF average disposable income per household

## 26 Cantons

TOP3 by inhabitants: Zürich, Bern, Waadt (Lausanne)

various times for school holidays

4 national languages

[Source](#)



## Travel Trade

21 Mio holiday trips more than 1 overnight (2023)/ 36% within Switzerland

89% travel intensity (people who travel)

around 1.400 travel agencies

around 20% booking via travel agencies

around 37% booking travel packages

examples tour operators\*:

- DER Touristik Suisse AG (Kuoni, Kontiki, Railtour)
- Hotelplan Suisse\* (Migros Ferien, Travelhouse)
- TUI Suisse Ltd. (airtours, Cruisetour)
- Knecht Reisegruppe (Glur Reisen, Baumeler Reisen...)
- Globetrotter Group AG

\* Change of ownership underway

[Source 1](#)

[Source 2](#)

[Source 3](#)



## Travel to Sweden

412.000 overnights in 2024

(+117% since 2008/ -1% since 2023)

52% Hotel

35% Camping

5% holiday cottages and apartments

33% of all overnight stays from Swiss guests travelling “North” are going to Sweden

around 65% of all overnight stays take place between June and August

TOP5 regions: Stockholm, West Sweden with Gothenburg, Skåne, Kalmar + Öland, Swedish Lapland

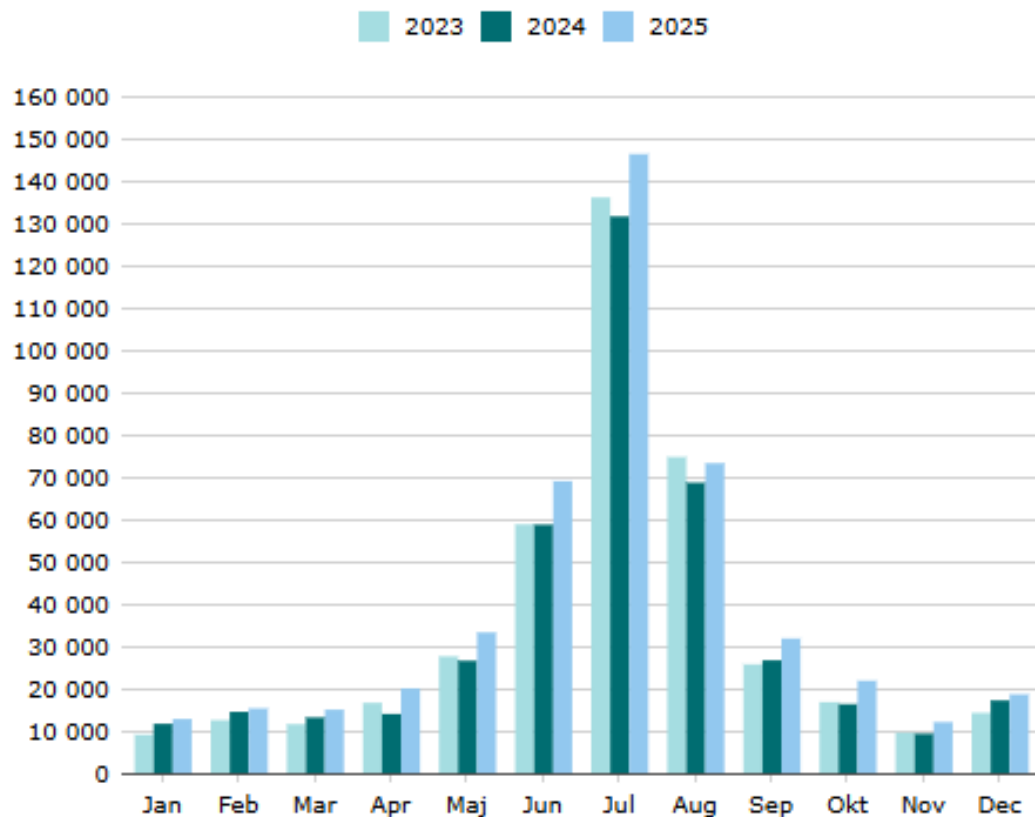
[Source](#)

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# Guestnights 2023/ 2024/ 2025 – Switzerland

## Gästnätter per månad



## January – December 2023

**416 594 st**

Total antal gästnätter, 2023-01 - 2023-12

**+47 054 st** **+12,7%**

Utveckling jämfört med föregående period,  
2022-01 - 2022-12

## January – December 2024

**411 669 st**

Total antal gästnätter, 2024-01 - 2024-12

**-4 925 st** **-1,2%**

Utveckling jämfört med föregående period,  
2023-01 - 2023-12

## January – December 2025

**472 602 st**

Total antal gästnätter, 2025-01 - 2025-12

**+60 933 st** **+14,8%**

Utveckling jämfört med föregående period,  
2024-01 - 2024-12

# Austria





# Overview Austria



## Market

9,2 Mio inhabitants/ 109 per km<sup>2</sup>

2,5 Mio families with kids

38% single-person households

50% two-person households

20% older than 65 years

4.025 EUR average net household income

9 federal states

TOP3 by inhabitants: Wien, Nieder-  
österreich, Oberösterreich

slightly different times for school holidays

Source



## Travel Trade

27,5 Mio holiday trips more than 1 overnight  
(2024)/ 47% within Austria

76,4% travel intensity (people who travel)

around 2.465 travel agencies

around 26% booking via travel agencies

around 30% booking travel packages

Examples tour operators:

- TUI Österreich
- Dertour Austria GmbH
- Verkehrsbüro (Ruefa, Eurotours)
- Eurofun Touristik GmbH
- Alpinschule Innsbruck (ASI Reisen)
- Kneissl Touristik

Source 1  
Source 2



## Travel to Sweden

184.000 overnights in 2024  
(+1,5% since 2023)

66% Hotel

21% Camping

6% Hostel

around 58% of all overnight stays take  
place between June and August

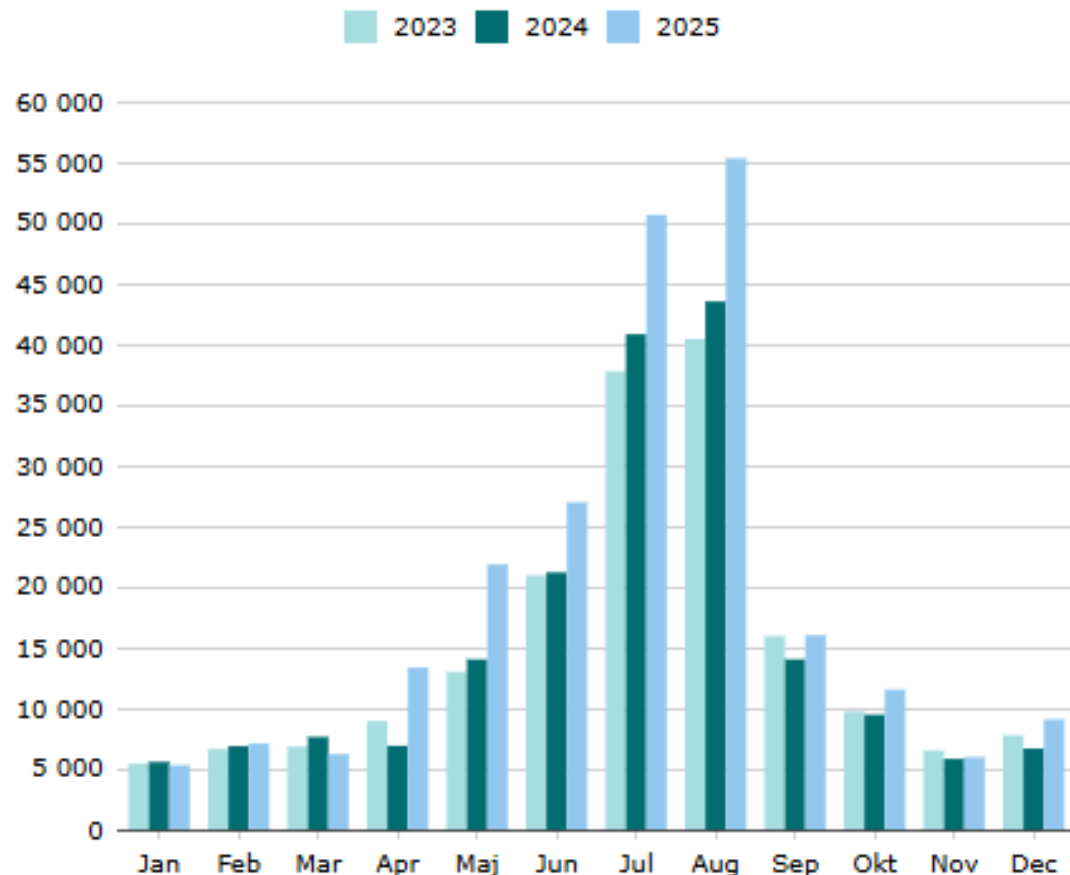
TOP3 regions: Stockholm, West Sweden  
with Gothenburg, Skåne, Kalmar + Öland,  
Swedish Lapland

Source

**Visit Sweden**

# Guestnights 2023/ 2024 / 2025 – Austria

## Gästnätter per månad



## January – December 2023

**181 281 st**

Total antal gästnätter, 2023-01 - 2023-12

**+39 108 st** **+27,5%**

Utveckling jämfört med föregående period,  
2022-01 - 2022-12

## January – December 2024

**183 883 st**

Total antal gästnätter, 2024-01 - 2024-12

**+2 602 st** **+1,4%**

Utveckling jämfört med föregående period,  
2023-01 - 2023-12

## January – December 2025

**230 712 st**

Total antal gästnätter, 2025-01 - 2025-12

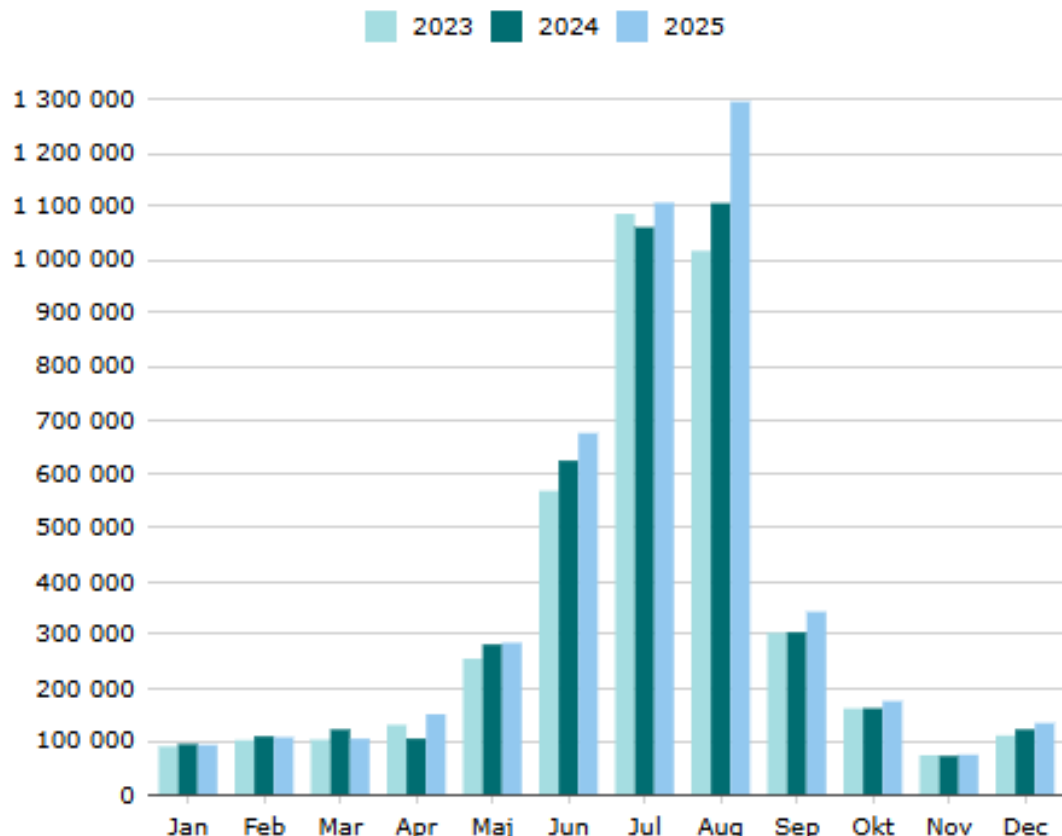
**+46 829 st** **+25,5%**

Utveckling jämfört med föregående period,  
2024-01 - 2024-12



# Guestnights 2023/ 2024/ 2025 – DACH region

## Gästnätter per månad



Total DACH Guest nights:  
January – December 2023

**4 009 885 st**

Total antal gästnätter, 2023-01 - 2023-12

**+368 935 st +10,1%**

Utveckling jämfört med föregående period,  
2022-01 - 2022-12

total internat. Guest nights:

**16 472 523 st**

Antal utländska gästnätter, 2023-01 - 2023-12

**+1 672 490 st +11,3%**

Utveckling jämfört med föregående period,  
2022-01 - 2022-12

~25%

January – December 2024

**4 173 130 st**

Total antal gästnätter, 2024-01 - 2024-12

**+163 245 st +4,1%**

Utveckling jämfört med föregående period,  
2023-01 - 2023-12

**16 807 964 st**

Antal utländska gästnätter, 2024-01 - 2024-12

**+335 441 st +2,0%**

Utveckling jämfört med föregående period,  
2023-01 - 2023-12

~25%

January – December 2025

**4 553 645 st**

Total antal gästnätter, 2025-01 - 2025-12

**+380 515 st +9,1%**

Utveckling jämfört med föregående period,  
2024-01 - 2024-12

**18 622 019 st**

Antal utländska gästnätter, 2025-01 - 2025-12

**+1 814 055 st +10,8%**

Utveckling jämfört med föregående period,  
2024-01 - 2024-12

~25%

# Visit Sweden for Travel Trade (DACH market)

**We are happy to help!**



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# Välkommen!

