

Selected first results of the 55th Reiseanalyse

WELCOME TO THE KEY RESULTS OF THE REISEANALYSE 2025

The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to announce key results from the current Reiseanalyse 2025. The Reiseanalyse, which has been conducted annually for more than 50 years, is considered the most detailed study on German holiday travel demand. The FUR is a neutral, non-commercial interest group of tourism research users.

2024: More travellers than ever before

In 2024, there were over 56 million holiday travellers (5+ days), more than ever before. Total expenditure on holiday trips reached a new record of over €90 billion. At the same time, the total volume of holiday trips rose to 68 million (2 million less than in 2019).

In terms of holiday destinations, foreign countries continued to dominate with a market share of 76%. However, the domestic market increased slightly from 22% to 24%. Abroad, Spain was clearly ahead of Italy, Turkey, Greece and Austria. In Germany, Schleswig-Holstein took first place in the federal state rankings for the first time. In line with the continued importance of the Mediterranean region, air travel, hotel accommodation and package holidays continued to enjoy high market shares. In terms of bookings, the long-term trend towards more and more online bookings at the expense of bookings made in person continued.

2025: Signs for a good year

Despite the rather negative assessment of the economic situation, Germans' holiday plans are positive: 75% of the population are planning to go on holiday in 2025. For 43%, the destination is already fixed, for 32% the destination is still open. That's more than a year ago and more than before the COVID pandemic.

Extensive travel experience and a wide range of holiday interests ensure that at least one long holiday trip a year is an integral part of most people's lives. If money is tight, people are more likely to save in other areas than on holiday travel itself. And there are also different strategies when it comes to holiday spending, which ultimately ensure that only a few people miss out on their holiday travel for financial reasons.

These are positive preconditions for a successful tourism year in 2025.

**Review 2024:
Record numbers of travellers
and total expenditure**

VOLUME OF HOLIDAY TRAVEL IN 2024: Slightly more travellers & slightly fewer trips, spending at record level

Holiday travellers



56.4

million

2023: 54.2 m
2022: 53.1 m
2021: 47.8 m
2020: 44.6 m
2019: 55.2 m

Holiday trips



68.3

million

2023: 64.5 m
2022: 67.1 m
2021: 55.1 m
2020: 50.5 m
2019: 70.8 m

Expenditure on holiday travel



90.1

billion

2023: 86.3 bn
2022: 80.1 bn
2021: 56.0 bn
2020: 45.1 bn
2019: 73.1 bn

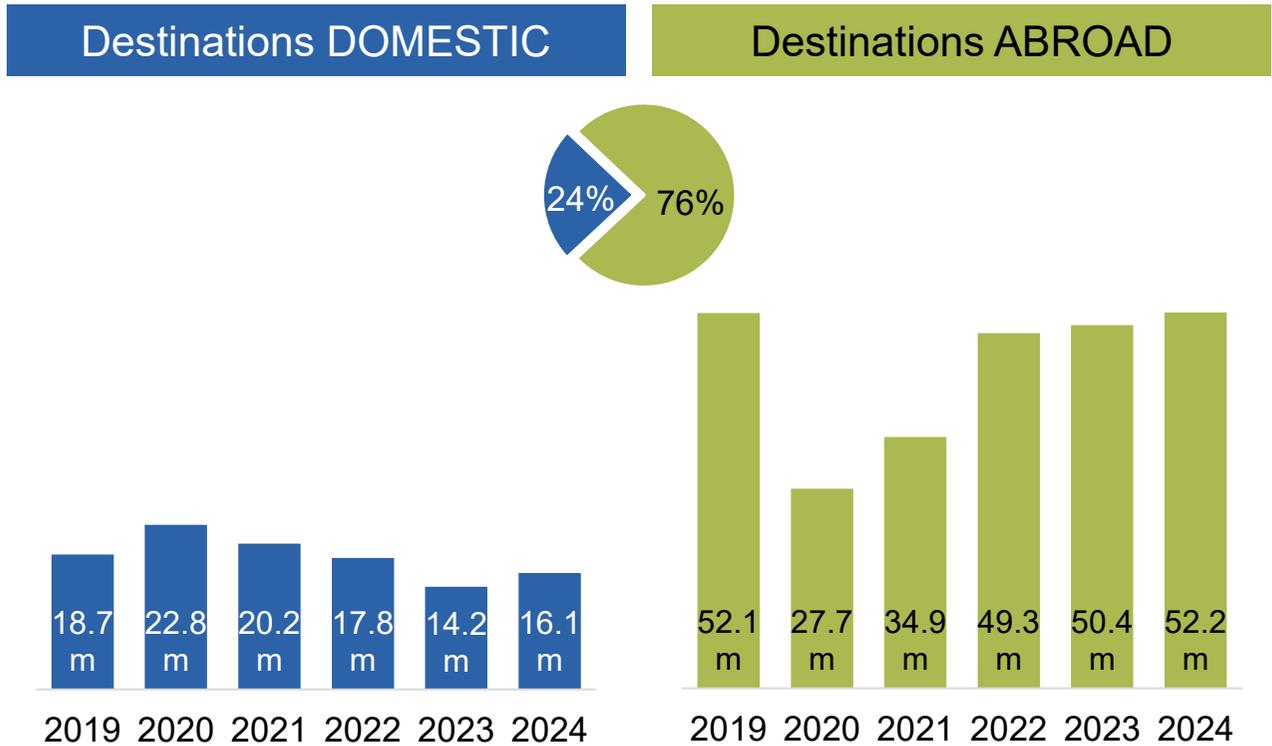
Holiday travel (5+ days)

The holiday travel intensity, i.e. the proportion of people who took at least one holiday trip per year, was 80% in 2024. This equates to a good 56 million people, more than ever before. The number of holiday trips increased to 68 million compared to the previous year. In terms of travel expenditure, 2024 was another record year: at € 90 billion, the volume was almost € 4 billion higher than in 2023.

Short breaks (2-4 days)

For the short holiday segment (14-75 years olds), the key figures for 2024 are: 94 million short holiday trips with total expenditure of € 37 billion. Both are record figures, well above the level of previous years.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2024: Growth in Germany and abroad



Market shares domestic vs. abroad

Trips abroad also dominated in 2024. At 76% of all holiday trips, their share was very high, albeit slightly lower than in the previous year (78%).

Domestic vs. foreign holiday volume

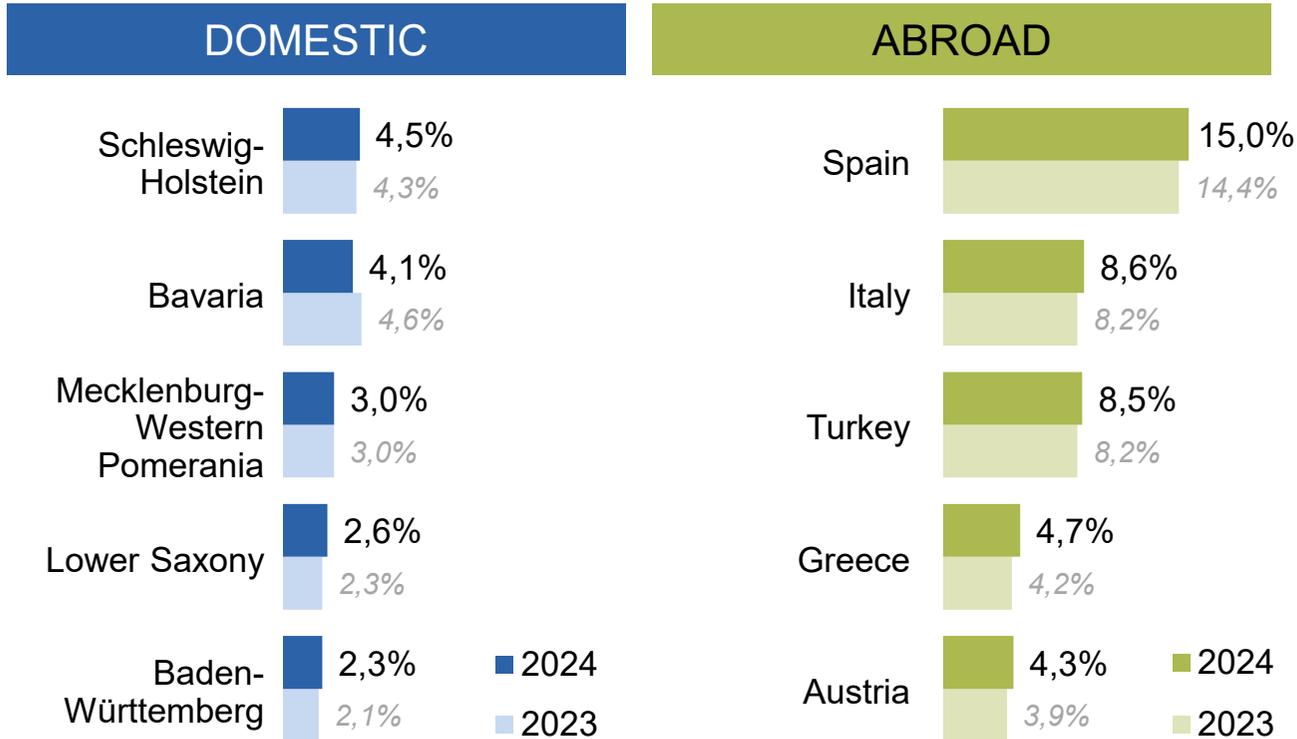
Destinations abroad accounted for a good 52 million holiday trips in 2024, almost 2 million more than in the previous year and around the same number as in 2019.

Germany was by far the most popular holiday destination. There was an increase of just under 2 million holiday trips compared to 2023.

Almost three out of four of short holiday trips (2-4 days) in 2024 were domestic, slightly less than 2023 and 2019.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2024:

Spain dominates abroad; coastal countries strong nationally



Domestic destinations

In the ranking of the federal states with the highest demand, Schleswig-Holstein replaced Bavaria at the top. It was followed by Mecklenburg-Western Pomerania, Lower Saxony and Baden-Württemberg. With the exception of Bavaria, all of these destinations recorded slight growth or stability compared to the previous year.

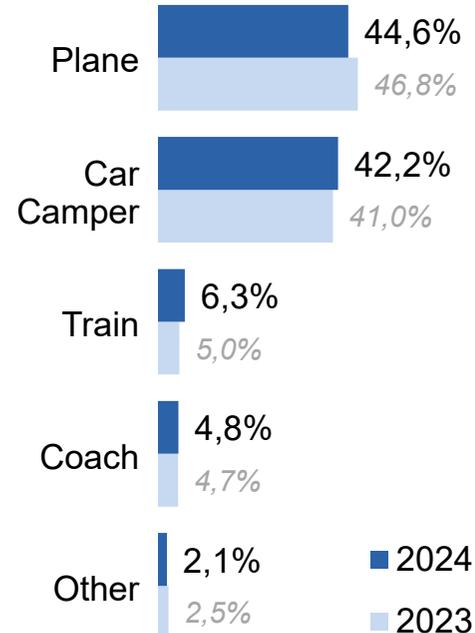
Destinations abroad

Spain further expanded its dominance abroad. It was followed by Italy, Turkey and Greece with slightly higher market shares than in the previous year. Austria also recorded an increase, relegating Croatia to 6th place. The market share of long-haul destinations was 6.9% (2023: 9.3%; 2022: 6.9%).

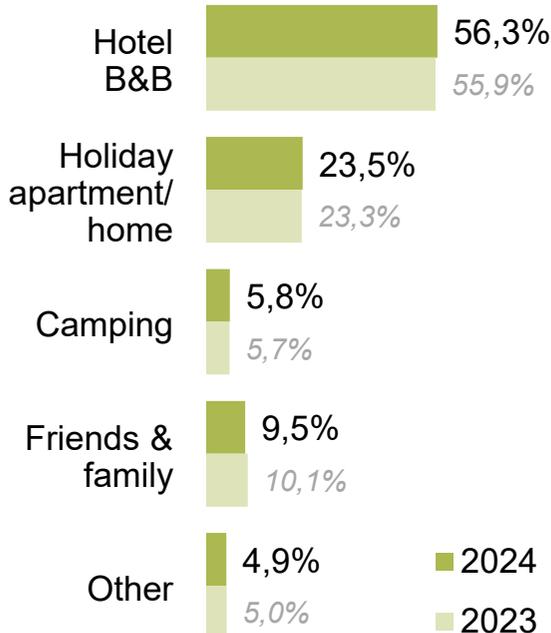
HOLIDAY TRAVEL BEHAVIOUR IN 2024:

Transport and accommodation fit with destination choice

Means of transport



Accommodation



Mode of transport

In line with the dynamics of travel destinations, there was a slight decline in the market share of air travel and a slight increase in car journeys. Rail travel also increased slightly.

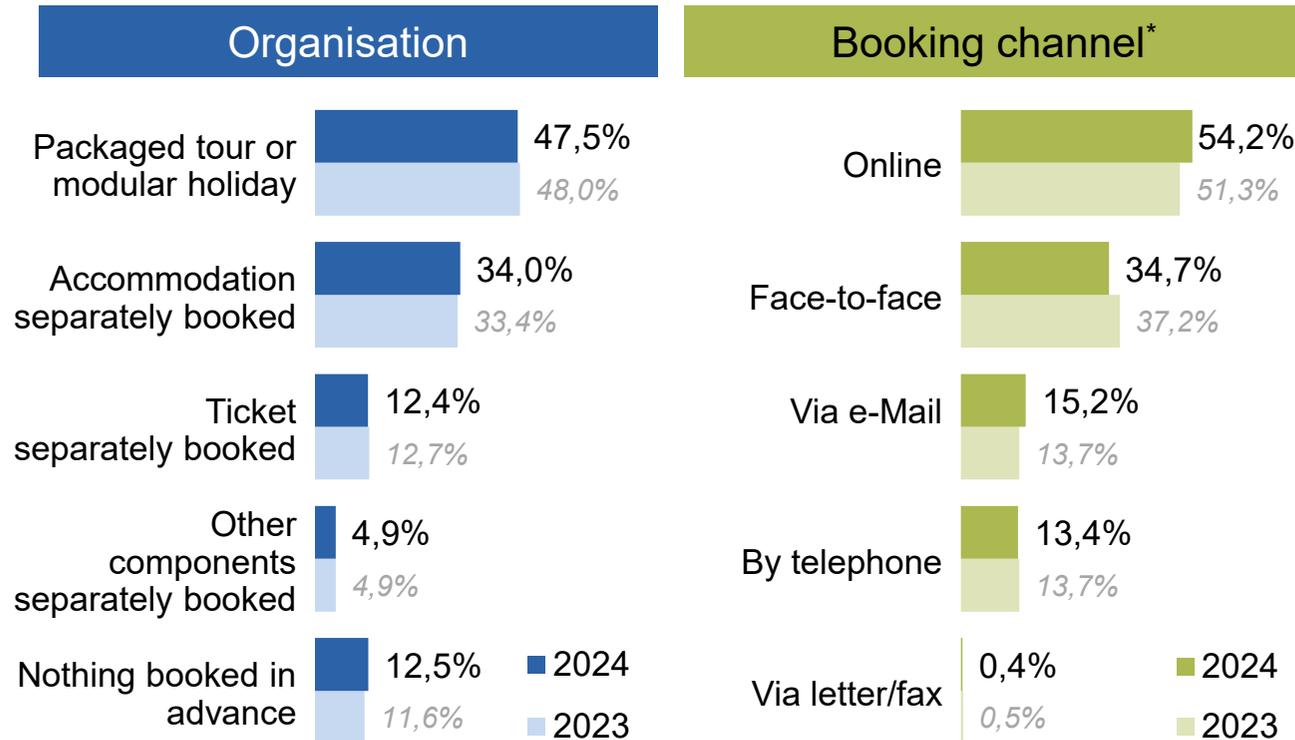
Accommodation

In terms of accommodation types, the market was largely stable. Hotels clearly dominated ahead of holiday flats and holiday homes.

Trip duration and expenditure

The average trip duration in 2024 was 13.0 days. This is almost as long as in 2023 and significantly longer than in 2022 (12.6 days) or 2019 (12.4 days). A similar amount was spent per person per trip in 2024 as in the previous year, namely an average of € 1,319 (2023: € 1,337; 2022: € 1,194; 2021: € 1,017; 2020: € 892; 2019: € 1,032).

ORGANISATION & BOOKING FOR HOLIDAY TRAVEL 2024: Package holidays in the lead, online bookings dominate



Holiday organisation

In connection with the continued importance of destinations in the Mediterranean region, the number of package holidays was also very high in 2024.

Booking channels

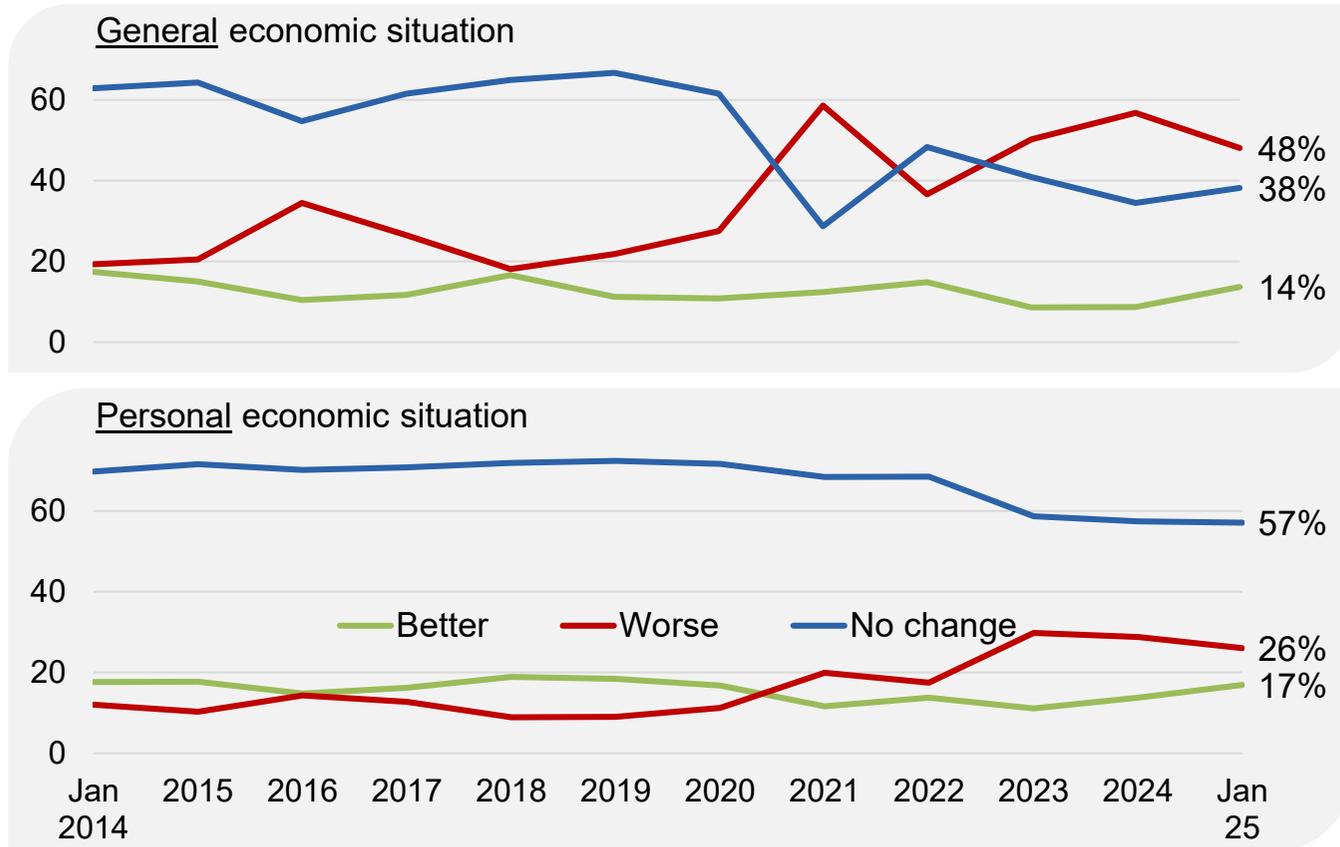
In 2024, more than 54% of all holiday trips were booked online. Services were booked face-to-face for just under 35% of all holiday trips. The increase in online bookings is in line with the long-term trend. On the other hand, there is a long-term downward trend in bookings made face-to-face.

* only holiday trips with advance booking
Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2024 lasting 5 days or more
Source: RA 2025

**Outlook 2025:
Positive outlook
for a strong travel year**

ASSESSMENT OF THE ECONOMIC SITUATION

Personal outlook slightly more positive than at the start of 2024



Assessment of the economic situation

With regard to general economic development, expectations have improved slightly compared to January 2024, but 48% of the population still expect the situation to get worse in the next 12 months.

A look at the personal economic situation is more important for holiday travel demand: the vast majority, namely 57% (previous year 57%), expect no change. 17% (previous year 14%) expect improvement, 26% (previous year 29%) fear a worse situation.

Although this is still a comparatively negative outlook for the personal economic situation, 74% of the population have a stable or even positive outlook.

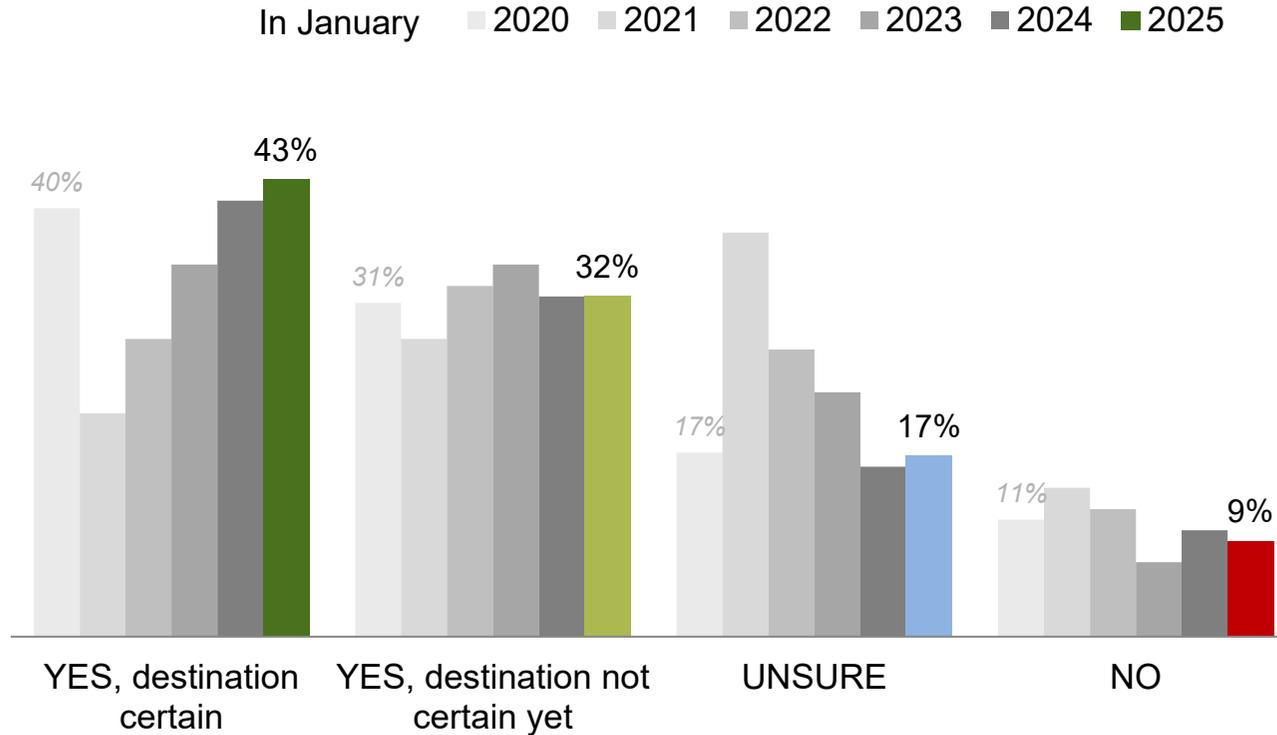
Question: How do you assess the general economic situation in Germany or your personal economic situation?

Will it be better, worse or the same in about a year's time?

Basis: German-speaking population, 14 years and older, in Germany; Source: RA 2025

TRAVEL PLANS 2025:

Most people already have definite plans for holiday trips



Status of holiday plans in January 2025

Despite the relatively negative assessment of the economic situation, Germans' vacation plans are very positive:

75% of the population plan to travel in 2025 for sure: 43% have already decided on their destination, while 32% still have their destination open. These are good conditions for a successful tourism year in 2025.

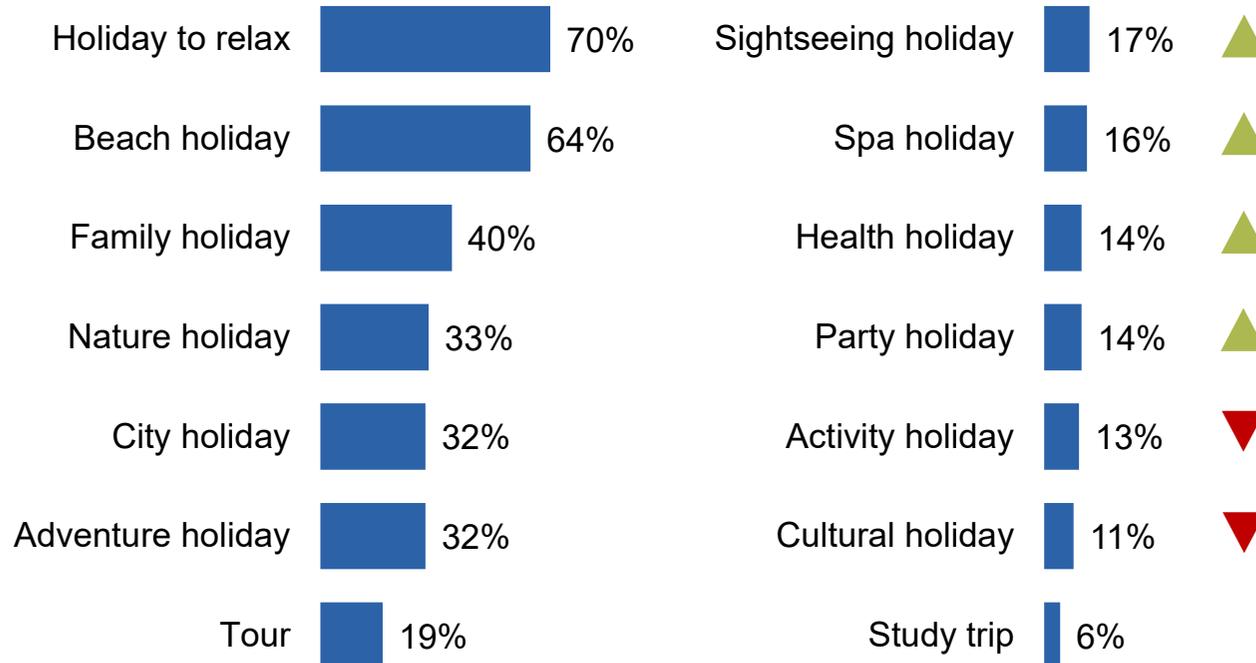
At 17%, the proportion of those who are unsure is at the same level as before the pandemic. The figure of those who are definitely not planning a holiday trip in 2024 is 9%.

Question: *Thinking about this year, do you already have holiday plans for 2025? Which of this list applies to you?*
Basis: German-speaking population, aged 14 and over, in Germany
Source: RA 2025

INTEREST IN TYPES OF HOLIDAY NEXT 3 YEARS

Interest and preferences have a stabilizing effect on demand

„definitely planning“ or „generally consider“ 2025, 2026 or 2027



Interest in types of holiday

When asked which types of holiday the population is most likely to plan in the next three years or which types of holiday are generally considered, two major preferences emerge: Relaxation holidays and beach holidays are clearly ahead of family holidays, nature holidays, city breaks and adventure trips (=“Erlebnisurlaub”).

The ranking of the top seven has not changed since before the pandemic and also corresponds to the ranking of actual demand in 2024. There were only minor shifts at the bottom of the ranking.

This stability and diversity in holiday interest is a further guarantee of strong holiday demand in the future.

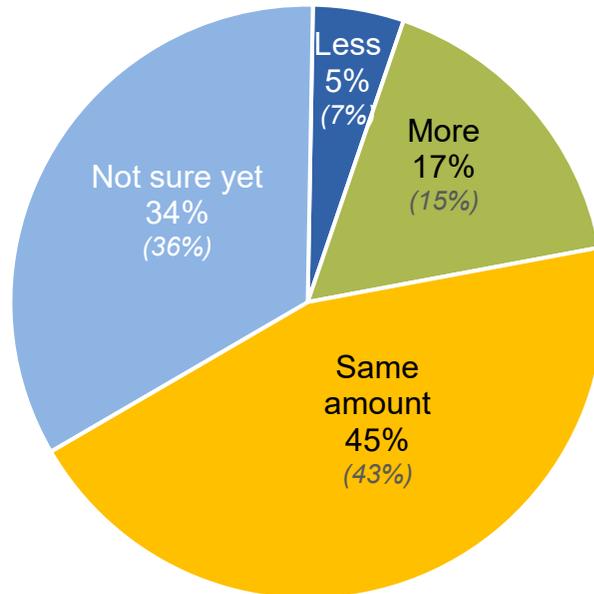
Question: Which of these types of holidays are you almost definitely planning to undertake within the next 3 years (that is 2025, 2026 or 2027)?
And which of these types of holidays would you generally consider for the next 3 years (that is 2025, 2026 or 2027)?

Basis: German-speaking population, aged 14 and over, in Germany; Source: RA 2025 – Triangles show ranking shift compared to January 2020 ('pre-COVID').

EXPENDITURE PLANS FOR HOLIDAY TRIPS IN 2025

Most plan to spend the same amount as last year

In 2025, will you spend less, more or the same amount?



Expenditure plans in January 2025

When it comes to holiday spending in 2025, 45% of people in Germany plan to spend the same amount as in the previous year. 34% do not yet know how their spending will develop. 17% plan to spend more and 5% less than in 2024.

These figures are at a similar level to the previous year, with slight increases for 'the same amount' and 'more'.

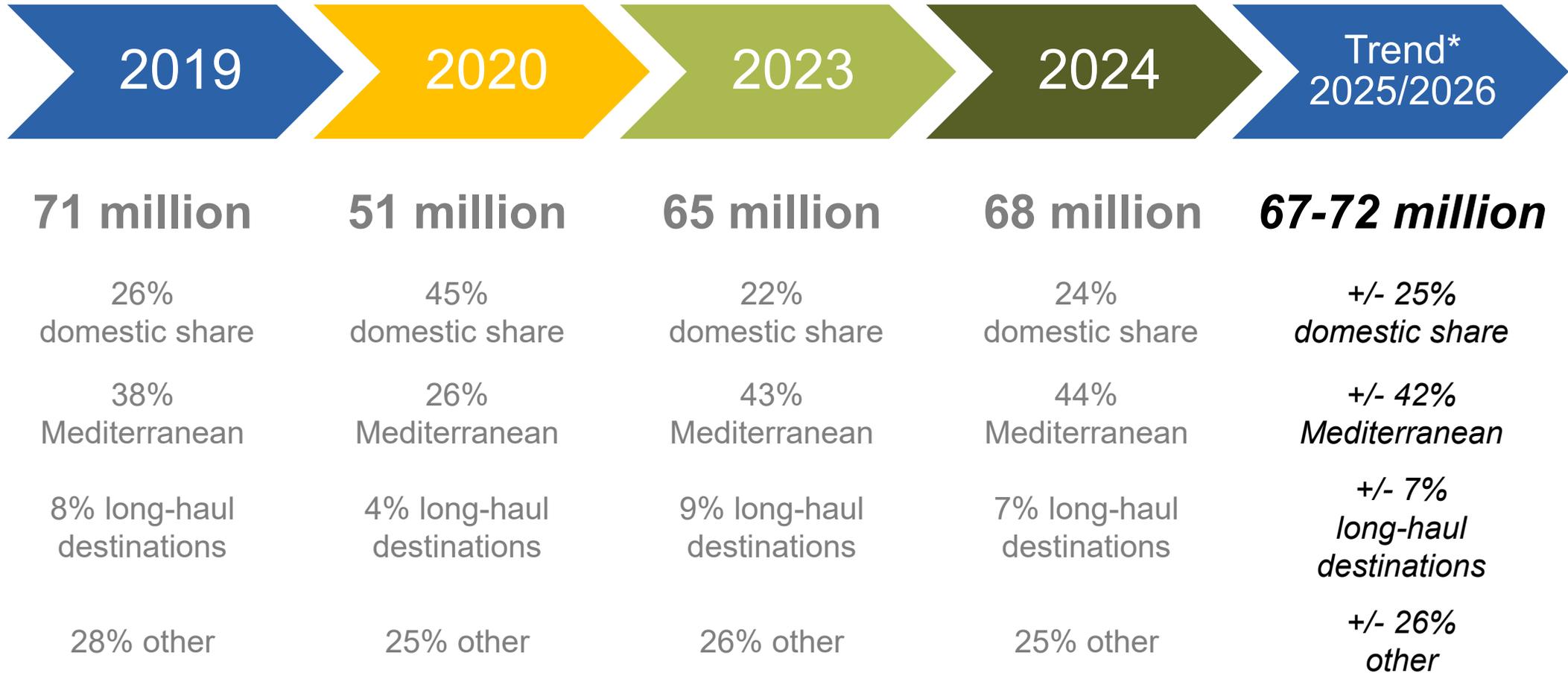
Those who are unsure about their holiday spending or certainly plan to spend less are considering savings options such as looking for special offers, foregoing trips, choosing cheaper destinations and/or accommodation or saving on incidental costs at the holiday destination.

Question: *From today's perspective, what are you planning for your holiday trips in 2025 compared to 2024? Will you spend less, more or the same?*

Basis: German-speaking population aged 14 and over, in Germany; figures from January 2024 in brackets
Source: RA 2025

CONCLUSION:

Trends in volume and destinations of holiday trips



Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2024 lasting 5 days or more
Source: RA 2025; * Data for 2025/2026: Estimation

Information about the Reiseanalyse

DO YOU WANT TO KNOW MORE? BECOME A REISEANALYSE PARTNER!

The Reiseanalyse (RA) has been studying the travel behaviour of the German population for over 50 years. Several population-representative surveys (*face-to-face* and *online*) are conducted annually with a total of more than 12,000 respondents.

The Reiseanalyse is a participation survey, the costs of which are shared by the partners of the RA. A basic participation is a prerequisite for using the results of our investigations. Depending on the area of application, the basic scope of participation can be supplemented and individualised with further modules and extensions.

Partners of the Reiseanalyse include national and international DMOs, tour operators, transport companies, but also public institutions, associations and universities.

All details on the Reiseanalyse and your participation options at www.reiseanalyse.de

As a partner of the RA you will receive information on:

Holiday travel experience
of the last 3 years
for 80 destinations,
25 holiday types & 15 activities

Travel behaviour last
year
All about holidays
and short breaks

Travel intentions and
Holiday interests
80 destinations,
25 types of holiday

Detailed socio-demographics, holiday motives, internet use

Optional extensions:

Module topics

Own questions in the
surveys

Exclusive/additional
questions

Analysis software

Sinus®-Milieus

Consulting and analysis
services

Fields of application:

Target group segmentation

Advertising planning

Volume estimates &
Profitability analyses

Analyses of potential

Motive research

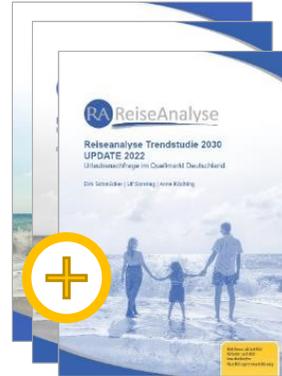
Benchmarking &
Brand tracking

Reiseanalyse Trend Study

Holiday demand in the source market Germany

The Trend Study describes the long-term development of the demand side of holiday tourism in Germany from the early 1970s

The most recent Trend Study 2030 was published in 2020 and analyzes the development of vacation tourism up to the year 2030. Two updates were published on the effects of the pandemic and the current crises on travel behavior.



ISBN Trend Study 2030: 978-3-949752-04-9
148 pages (plus 44 pages update 2021 and 24 pages update 2022)

RA 2024: Summary of the results

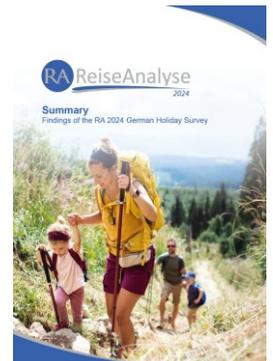
Structure and development of demand for holiday travel

The annual summary of the Reiseanalyse focuses on a detailed summary of the key findings of our most recent research.

The latest edition deals with the findings on travel behaviour in the travel year 2023, as well as with motives and preferences in connection with holiday trips.

In addition to selected results, time series and comparisons with the previous year, the summary also contains evaluations of short holiday trips by the German-speaking population.

A short version of the RA 2025 will be published in autumn 2025.



ISBN :978-3-949752-07-0
86 pages, 89 illustrations



In autumn 2025, the new Trend Study 2035 will be published, which will show current developments and future forecasts up to the year 2035.

These Reiseanalyse publications are available in German as well as in English translation.
Further information and ordering at www.reiseanalyse.de/publications