

# Market Demographics

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- Together, Germany, Austria and Switzerland have a total population of **approx. 100 million inhabitants**
- All 3 countries have **strong and stable economies**, which result in **high living standards** and **high disposable income**
- **Germany** is **size-wise** in between OR and MT, has 76.5 % urban population, (Berlin 3.4 **mio** / Hamburg 1,8 **mio** / Munich 1,3 **mio** and Frankfurt 650.000)
- Germany is the **third largest economy in the world** and the largest economy in Europe.
- Despite crises and the ongoing war in Ukraine, Germans' **travel intentions are again very positive for 2025** and we surpassed revenue numbers from 2019, pre-Covid.



# Market Update – Travel Intention

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- "In 2025, travel will no longer be seen primarily as a luxury, but as an essential part of life - an expression of resilience and the **need for normality in an increasingly complex world**. For many people, vacations are not just about relaxation, but also a **conscious break** from stressful everyday life - an outlet in a time characterized by pessimism and negative headlines." (Professor Dr. Reinhardt - Scientific Director of the Foundation for Future Affairs)
- Therefore – even if prices are rising: Apart from everyday goods such as food and personal care, **travel is the most important item for German consumers!**
- People in German speaking countries have a lot of vacation: **Total amount of 35-44 days** of paid time off (including public holidays).
- **Travel intentions at a high level:** In November 2024, 76% of the population were already planning one or more vacation trips for 2025!
- **USA #1 long-haul destination again in 2024!** At just under the two million mark, the flow of visitors from Germany to the USA has almost reached the (record!) levels of 2019.

# FUN FACTS

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Germans, Swiss and **Austrians**

- LOVE a good **breakfast** – and appreciate it being included in the room rate
- Are diligent **waste separators**
- **Like to sit outside** whenever possible and prefer open-air dining options, as they are not used to air condition
- **Appreciate anything “free” or “included”** such as Wi-Fi, coffee/tea, breakfast, complimentary Happy Hours, etc



# Market Update - Inspiration

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## FROM:

33% - family and friends - their experiences and recommendations

21% - travel agents or tour operators

17% - travel magazines and articles, radio, TV features and podcasts

(for all above online and offline of course)

German market holidaymakers are attracted to many different tourist offers. They are **multi-optional** and have **more desires and interests** than they can fit into one trip in one year. This ensures demand, but also increases competition!

**A sign of the flexibility of demand:** 52% (previous year 45%) are planning to visit a destination this year where they have not yet been.

# Market Update – Booking & Spend

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- Insolvency of one of Germany's largest tour operators, the FTI Group: **major package TOs benefited most**, also **mid-size specialists like CANUSA or America Unlimited** are seeing positive impact, building up double-digit growth rates in 2024.
- Travel agencies remain the most important sales channel, especially for **consultation-intensive products such as long-distance and round trips** in particular.
- The popularity of **well-protected, classic package tours** is growing again. Compared to the previous year, 6% more booked a vacation with a tour operator. 80% of all long haul-trips are booked like that.
- Since 2023, **travel spending has exceeded the number of 2019**, the best year for the industry to date (a total of 79B in '23 to 83B in '24) – 10K average in booking / daily spend of \$400 - \$450 during a vacation in the US.
- The **long-haul destination USA** is roughly **on a par with the previous year in terms of sales volume**. Overall, long-haul travel sales for summer 2025 exceed the previous record year 2019, although the **number of travelers booked is still a quarter lower**.

# FUN FACTS

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## Germans, Swiss and Austrian

- **Like to drive** (...Germans sometimes too fast 😊...)
- **Love Roadtrips and Roundtrips** (study shows interest in that increased again)
- Prefer **distances** to be provided in **kilometers or hours**
- **BUT** – also **like to walk** to places (e.g. hotel nearby attractions, downtown with shopping and restaurants etc. – **and** have a beer 😊)



# Market Info – Who travels to the GAW

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On average:

**45-48 years**

Annual Income: \$102,000

Party Size: 2

Length of stay: **18 days**

Travel Preference:

- **Fly Drives** (Individual – FIT travel)
- **Road-trips** to explore the GAW in rental cars, campers or motorhomes

- **Repeat Visitors** to the US
- **30+ couples** (double income, no kids) and
- **55+ couples** whose kids are old enough to travel on their own
- Some families
- Please note: The wave of **baby boomers** retiring is only just beginning, and they are fitter, more travel-experienced and wealthier than any generation before them.

# Why we travel to the GAW

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- Diverse and unspoiled natural landscapes
- Small town America and Culture
- Authentic destination experience
- Iconic features such as National & State Parks
- Road-trip experiences and scenic byways
- Soft adventure (like Rafting, Glamping, Unspoiled Night Skies, Zip-Lining, Hiking)
- Unique experiences (Ranch stays, Horseback Rides, Cowboy-Cookouts...)
- Western and Native American culture (Rodeos and Powwows...)
- Wildlife watching
- Getting away from stress of density
- Hidden Gems away from Mass-Tourism
- Pristine and safe destinations

# Market Trends

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- **Early Planning and Booking:** According to the HolidayCheck Travel Report 2025, families book their vacations on average 20 days earlier than in 2024 (also to save money, secure best rooms and flights etc.)
- **Low Season Travel:** 79% of Germans want to travel in the low season (saving money, profit from more relaxed travelling conditions with less crowds, mild weather and shorter waits)
- **Off the beaten track:** More often travelers are seeking remote and lesser-known destinations to avoid overtourism
- **Personalized Experiences:** growing expectation for tailored travel experiences. Utilizing data analytics, companies are more often offering customized itineraries that cater to individual preferences
- **Night Tourism:** stargazing and cultural events, are gaining popularity - travelers are also looking to avoid daytime crowds and high temperatures
- **Adventure and Experience-Seeking:** Travelers prioritize unique and adventurous experiences, such as extreme sports, wildlife safaris, and cultural immersion trips
- **Technology Integration:** advanced technologies, including artificial intelligence and virtual reality, is enhancing trip planning and on-site experiences, offering virtual tours and personalized recommendations

# Thank you!

