



Tourism Demand in Germany

Cultural Travel Trends, Holiday Motivations and Activities – Insights and Opportunities for Norway

Bente Grimm (FUR/NIT)

Innovation Norway – Digital Day of Competence
Online-presentation on September, 30th, 2026



This presentation is part of an oral presentation and is only complete with supplementary explanations.

The German holiday market

- *Volume, destinations and types of holidays*
- *Holiday motives and activities*
- *Interest in destinations and holiday types*

German holiday trends 2035 and importance of AI

Origin of the insights and data

- Data from our REISEANALYSE
- Longest-running (since 1970) and most established regular study regarding leisure travel demand of the Germans
- Domestic and outgoing tourism
- Volumes, behaviour, attitudes, interests
- Face-to-face and online:
12,000 interviews in total
- Representative for the population in Germany



Further information and orderable publications:
<https://reiseanalyse.de/en/>



The German holiday market
***Volume, destinations and
types of holidays***

VOLUME OF HOLIDAY TRAVEL IN 2025:

Records for travellers and spending on holiday trips

Holiday
travellers



**57.1
million**

2024: 56.4 m
2023: 54.2 m
2021: 47.8 m
2019: 55.2 m

Holiday
trips



**67.7
million**

2024: 68.3 m
2023: 64.5 m
2021: 55.1 m
2019: 70.8 m

Spending on
holidays



**91.7
billion**

2024: 90.1 bn
2023: 86.3 bn
2021: 56.0 bn
2019: 73.1 bn

Holiday trips 5+ days 2025:

Major regions as holiday destinations in 2025 - volume

Germany (total)

Schleswig-Holstein:	2.9 m
Bavaria:	2.6 m
Mecklenburg-W. Pomerania:	2.3 m
Lower Saxony:	1.7 m
Baden-Württemberg:	1.3 m

Other European destinations (excl. Mediterranean)

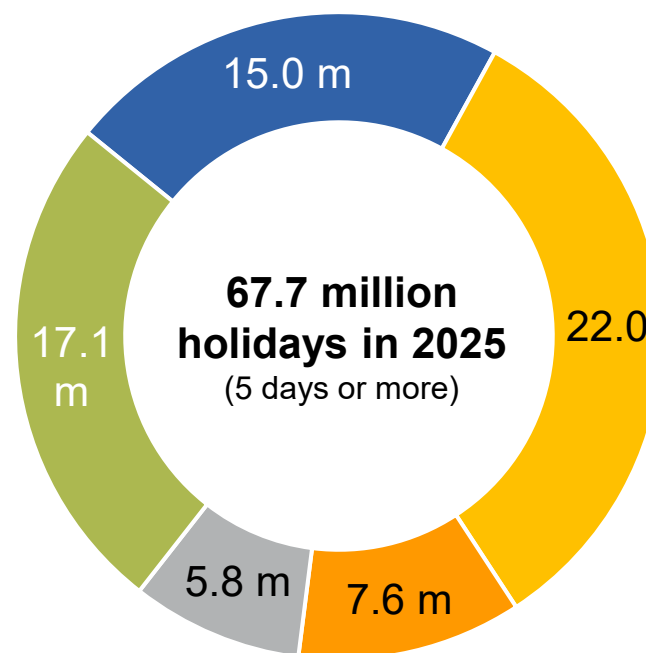
Austria:	3.0 m
Poland:	1.6 m
Denmark:	1.6 m

...

Norway 0.5 m

Long-haul destinations

South East Asia:	1.3 m
Caribbean:	0.7 m
USA:	0.6 m



European Mediterranean¹

Spain ¹ :	9.9 m
Greece	3.8 m
Croatia:	2.9 m
Italy ¹ :	2.8 m

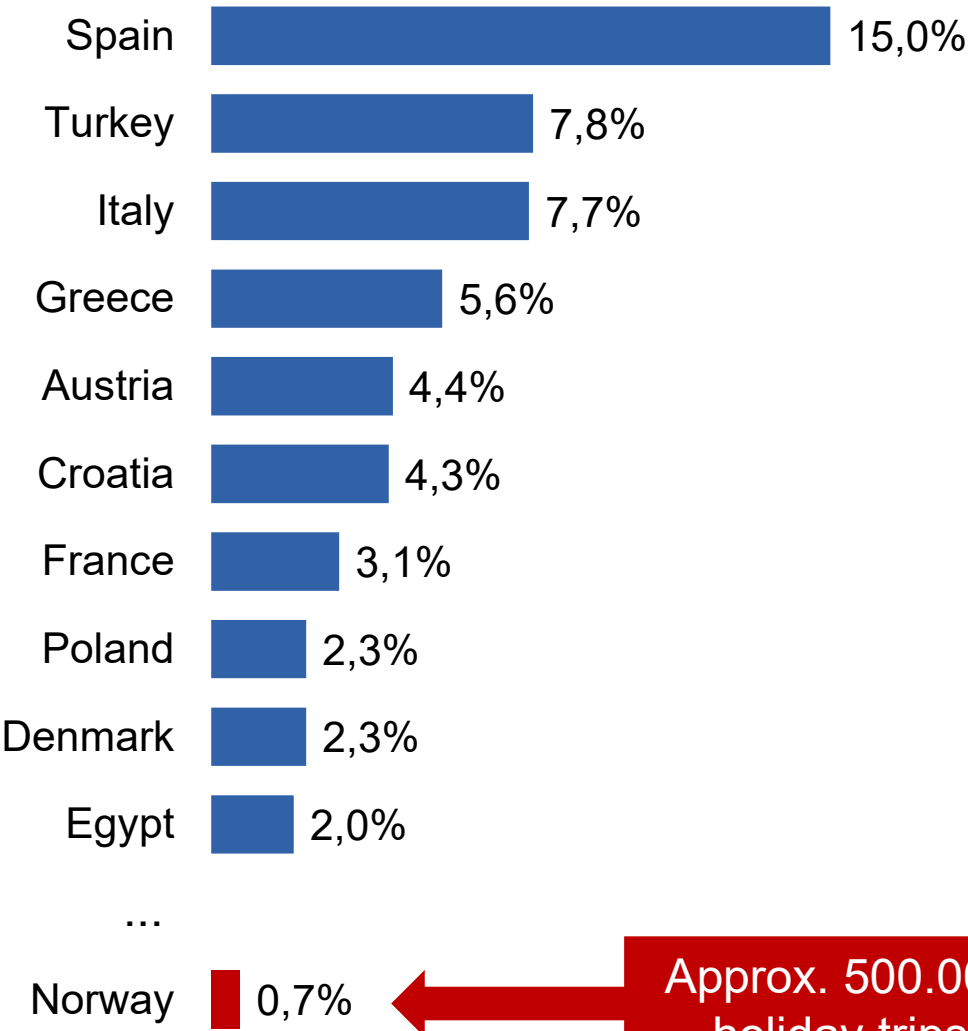
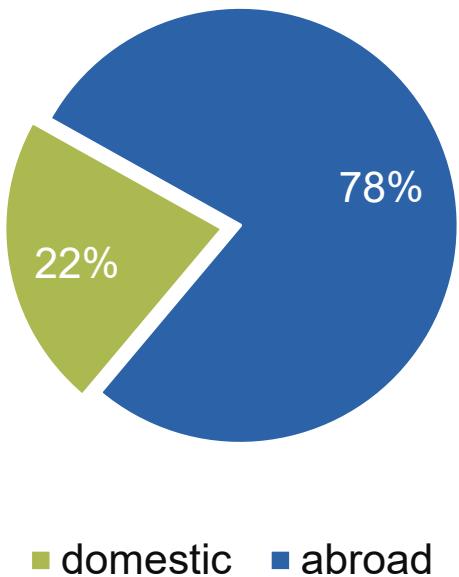
Non-European Mediterranean destinations

Turkey:	5.3 m
Egypt:	1.4 m
Tunisia:	0.6 m

¹ Spain, Italy: holiday travel to destinations in Mediterranean regions only, plus Canary Islands and Portugal incl. Azores and Madeira
Holidays (5 days or more), in million; rounding differences may occur
German-speaking population aged 14 or over; RA 2026 *face-to-face*

Holiday trips 5+ days 2025: Top destinations

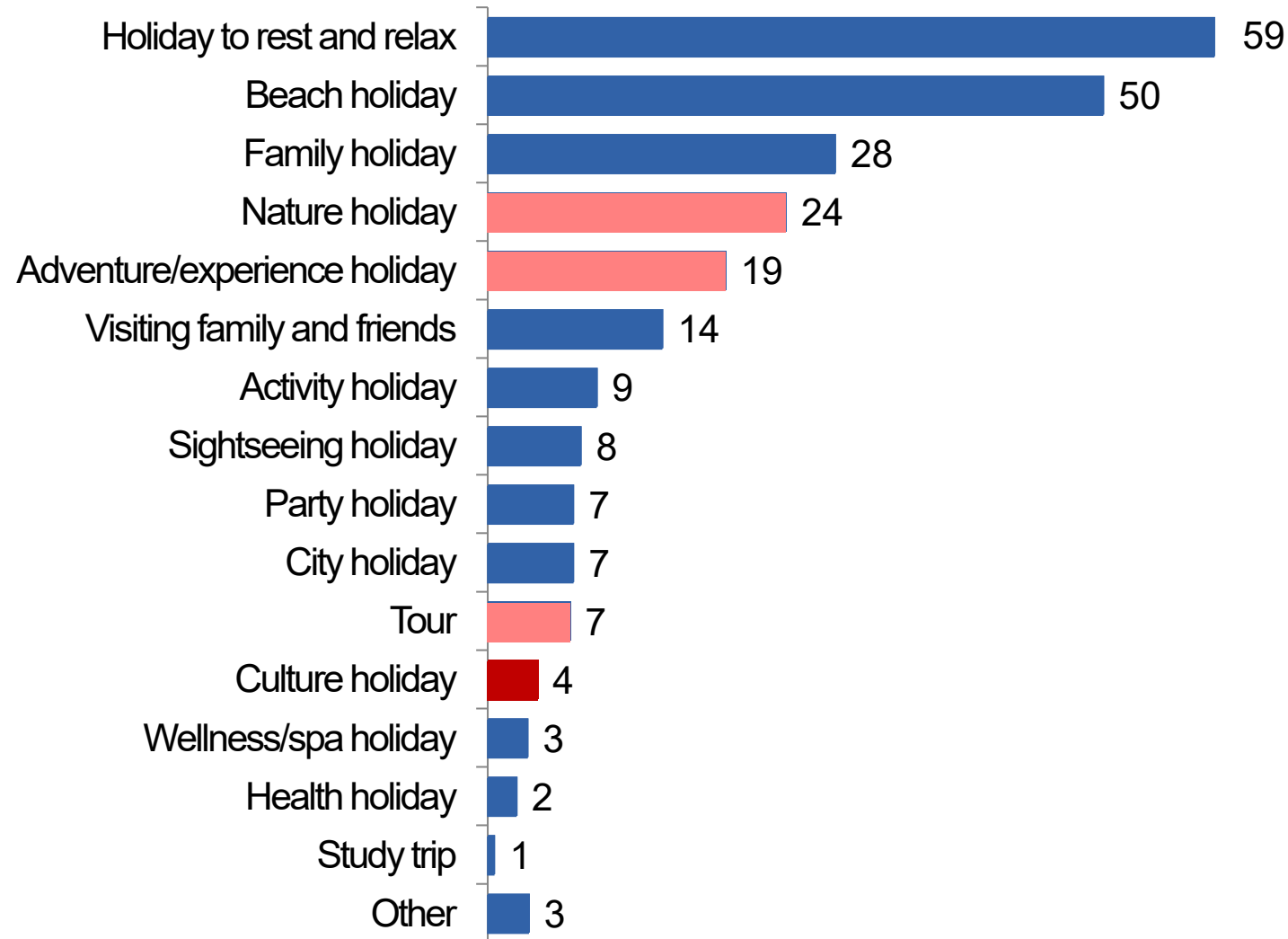
67.7 million
holiday trips 2025



Approx. 500.000
holiday trips

Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over; Source: RA 2026 *face-to-face*

Holiday trips 5+ days 2025: Types of holidays



Holidays (5 days or more), total for type of holiday (multiple responses), in %, rounded figures, bar length accurate
German-speaking population aged 14 or over; RA 2026 *face-to-face*

Holiday trips 5+ days 2025:

Top 10 destinations for selected types of holidays

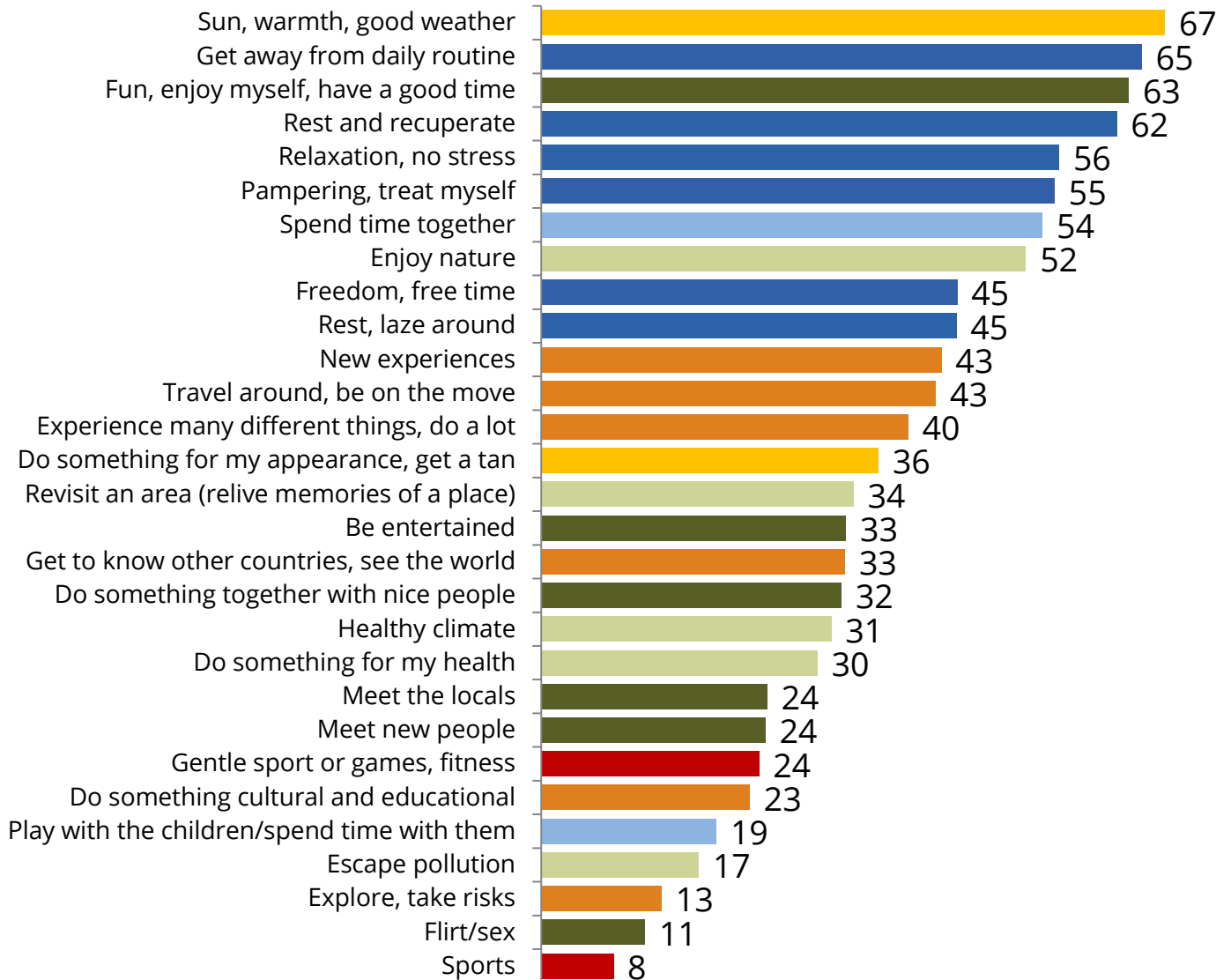
Beach holiday			Nature holiday		Tour	
14.9 m			3.3 m		2.2 m	
1	Spain	31 %	Austria	14 %	Spain	9 %
2	Turkey	16 %	Bavaria	12 %	Italy	8 %
3	Greece	12 %	Italy	11 %	France	7 %
4	Croatia	7 %	Schleswig-Holstein	9 %	Norway	7 %
5	Italy	6 %	Mecklenburg-W. Pomerania	8 %	USA	6 %
6	Egypt	3 %	Spain	6 %	Denmark	5 %
7	Schleswig-Holstein	3 %	Denmark	5 %	Austria	4 %
8	France	3 %	Lower Saxony	4 %	UK	4 %
9	Portugal	2 %	Baden-Württemberg	4 %	Belgium/Luxembourg	3 %
10	Tunisia	2 %	North Rhine-Westphalia	4 %	Sweden	3 %

Holidays (5 days or more), type of holiday "primarily"
German-speaking population aged 14 or over; RA 2026 *face-to-face*

The German holiday market

Holiday motives and activities

Holiday motivations: Ranking



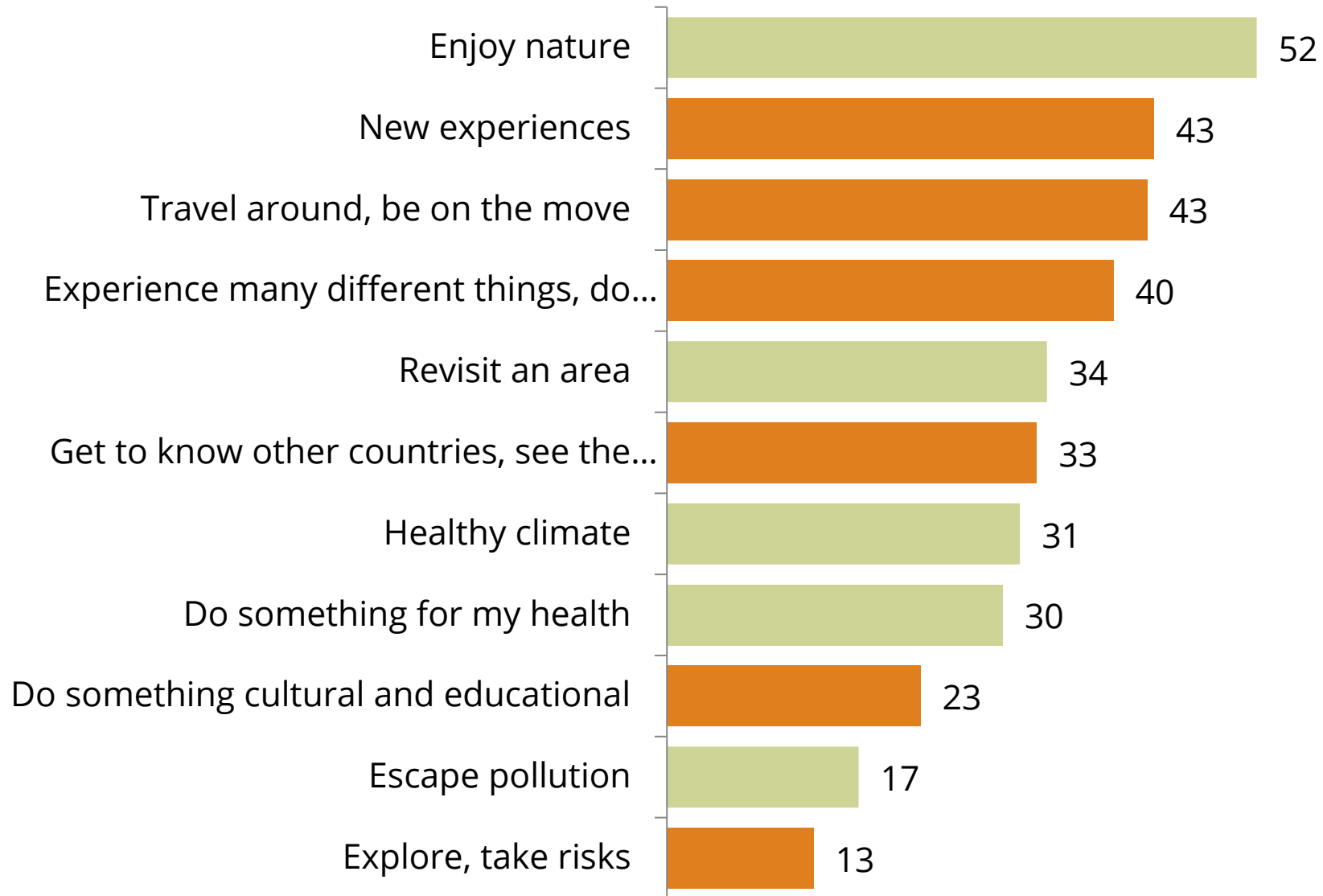
Holiday motivations – “particularly important”, in %, rounded figures, bar length accurate
 German-speaking population aged 14 or over; RA 2026 *face-to-face*

Holiday motivations: Top 10



Holiday motivations – “particularly important”, in %, rounded figures, bar length accurate
German-speaking population aged 14 or over; RA 2026 *face-to-face*

Holiday motivations: Nature and cultural experiences



Nature and
health



Explore
and
experience



Holiday motivations – “particularly important”, in %, rounded figures, bar length accurate
German-speaking population aged 14 or over; RA 2026 *face-to-face*

Holiday activities 2023-2025

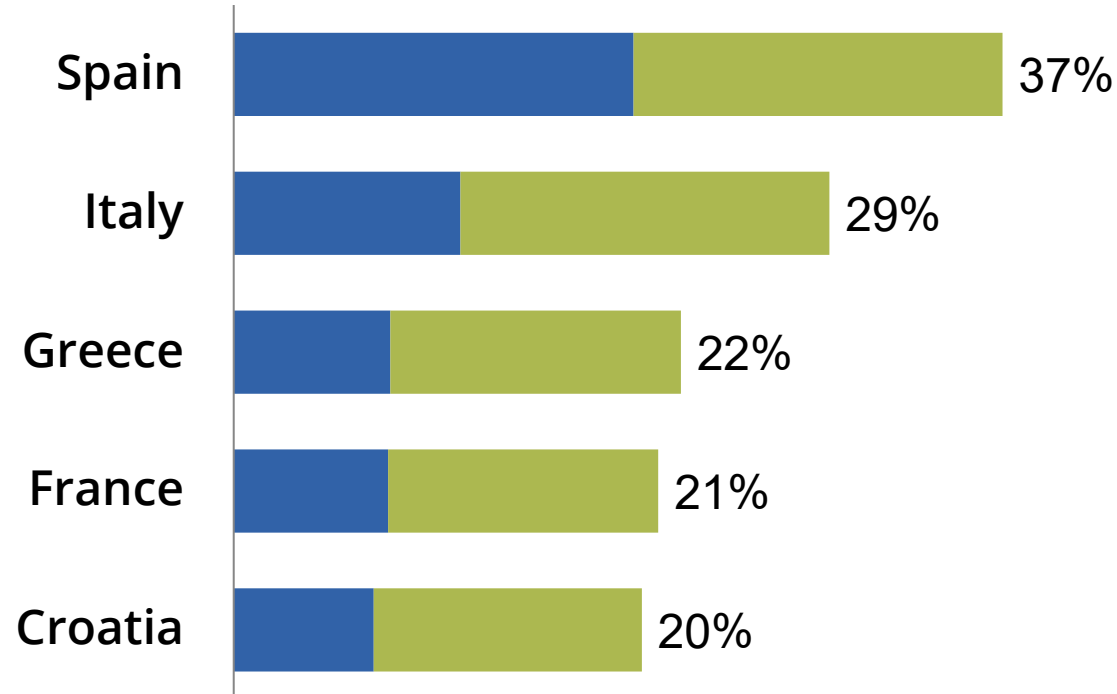
General holiday activities	Tried local specialties	68
	Rested and caught up on sleep	44
	Made holiday friends	37
	Played with children	20
Excursions and use of infrastructure	Went on day trips	73
	Window shopping, shopping	67
	Visited natural attractions	41
	Visited cultural/historical sights/museums	40
	Visited theme parks/amusement parks	17
Sport and activity	Used health and spa facilities	10
	Swimming in a lake or the sea	63
	Used swimming pool	50
	Gentle sport	32
	Hiking, walking tours	24
	Cycling	16

Experience of selected activities on holiday in the past three years, in %, multiple responses possible;
German-speaking population aged 14 or over in Germany, RA 2026 *face-to-face*

The German holiday market
***Interest in destinations and
holiday types***

Interest in foreign holiday destinations: Top 5

asked in
January 2026



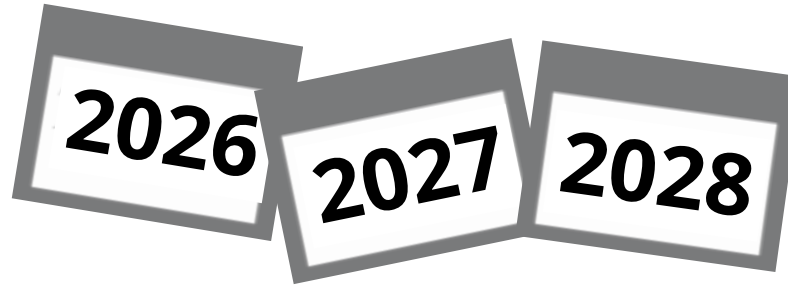
almost definitely planning

generally considering

"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2026-2028) And which of these countries would you generally consider as a holiday destination in the next three years?"

Basis: German/German-speaking population 14+ years in Germany; Source: RA 2026 *face-to-face*

Interest to travel to Norway



1.8 % (1.3 million)

"almost definitely planning"

a holiday in Norway in the years 2026-2028

4.2 % (3 million)

"generally considering"

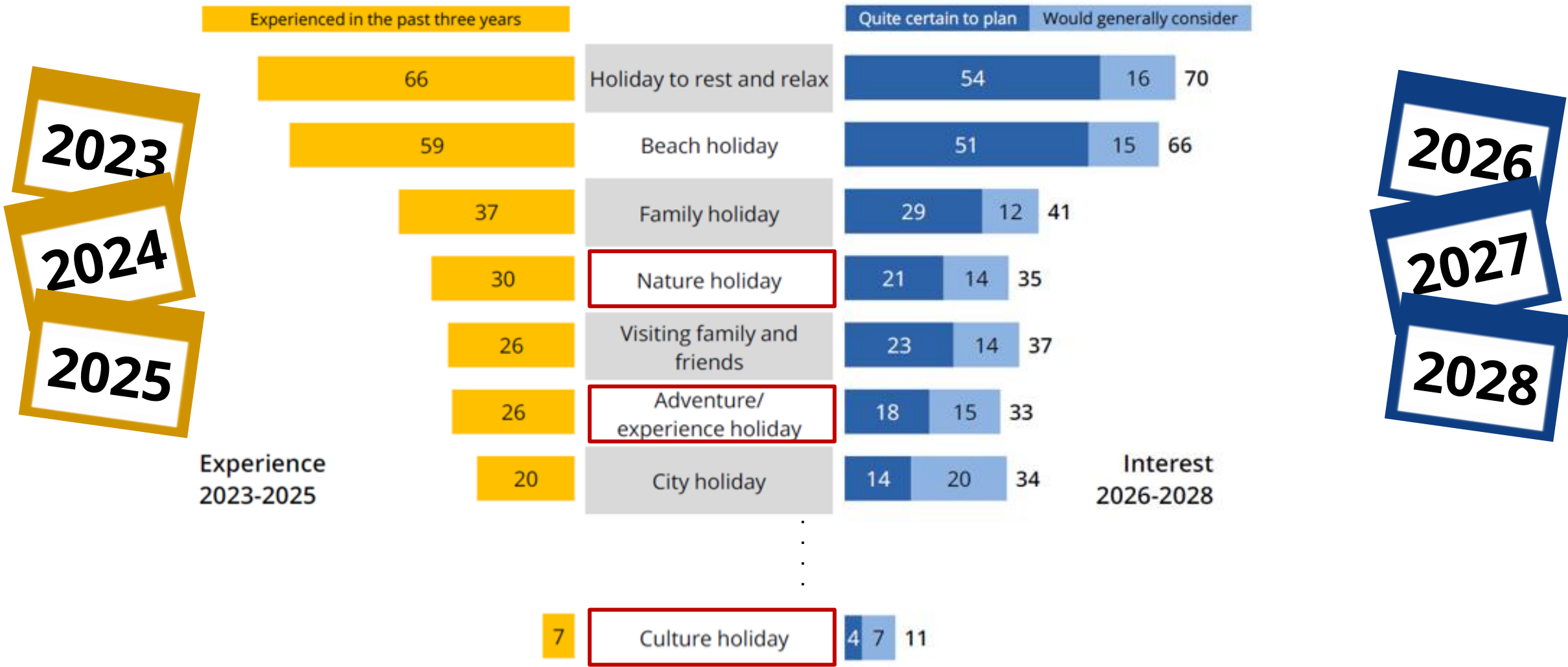
a holiday in Norway in the years 2026-2028

"Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2026-2028)" resp.

"And which of these countries would you generally consider as a holiday destination in the next three years?"

Basis: German-speaking population 14+ years in Germany; Source: RA2026 *face-to-face*

Interest in types of holidays: Top 7 plus culture



Experience (“in the past three years”) and interest (“quite certain to plan” and “would generally consider in the next three years”) for selected types of holidays, in %; German-speaking population aged 14 or over in Germany, RA 2026 face-to-face

German holiday trends 2035 and importance of AI

Reiseanalyse Trend Study

Holiday demand in the source market Germany



Contents of the Trend Study

1. Environment and supply analysis
2. Holiday wishes
3. Demand volume
4. Holiday destinations
5. Holiday planning
6. Organisation of holiday trips
7. Types of holiday travel
8. Conclusion:
From trends to the big picture

ISBN Trend Study 2035: 978-3-949752-04-9
122 pages (78 illustrations and diagrams)
Available in German and English

AI and holiday travel

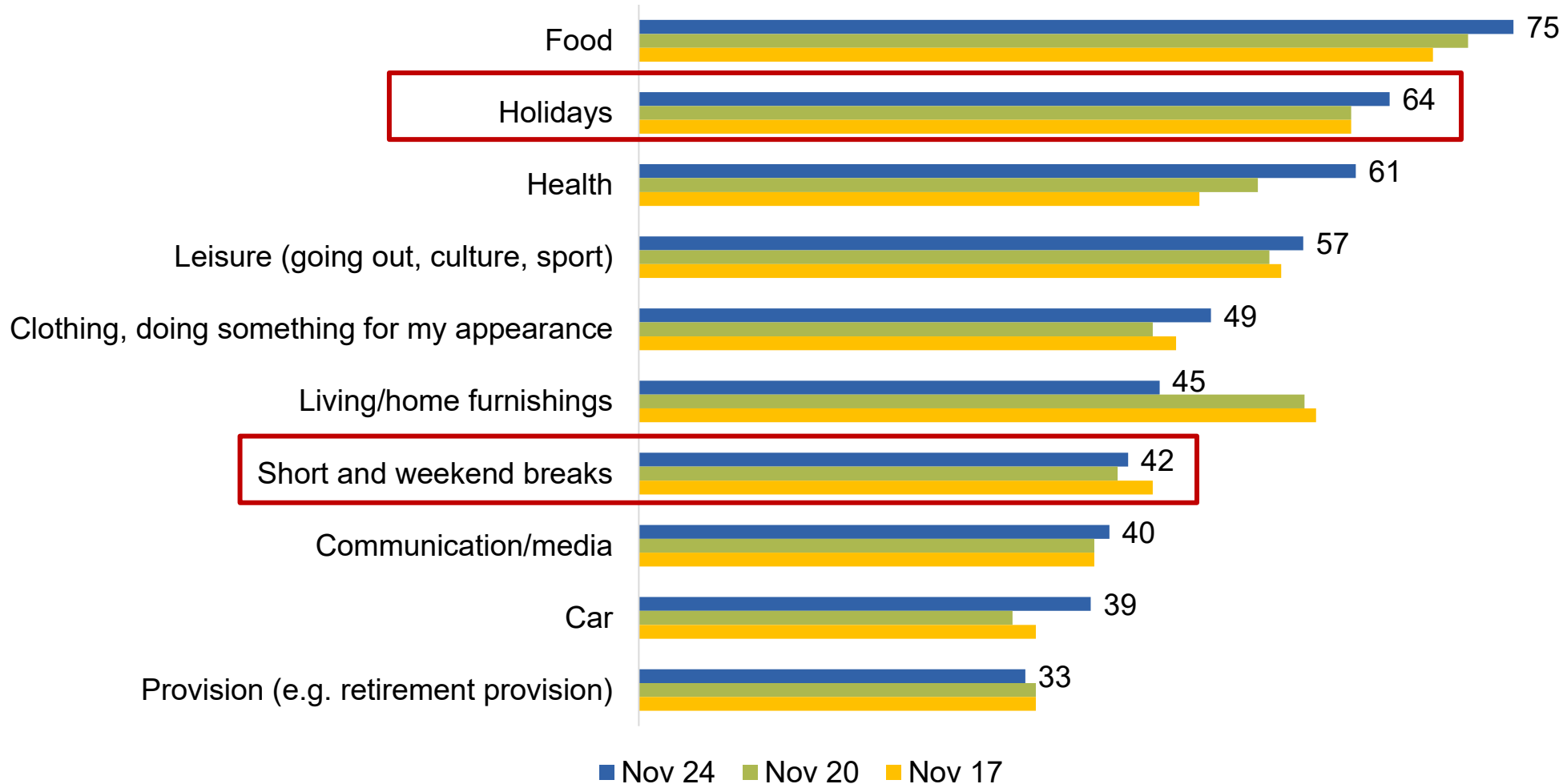
Use, attitude and potentials 2025

(publication in German)



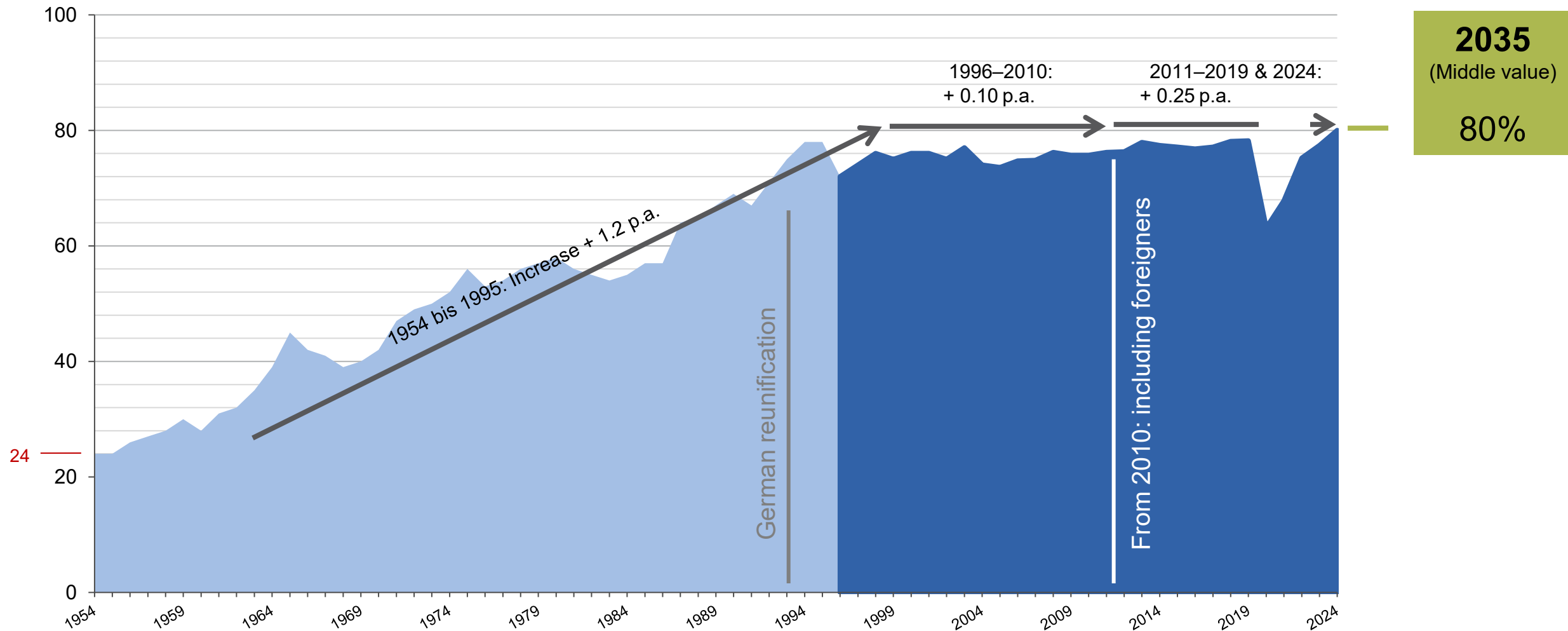
Further information and ordering at reiseanalyse.de/publications/

Consumption priorities: Holiday trips highly valued



Holidaymakers (holiday or short break in the last twelve months), figures in percent,
German-speaking resident population aged 14–75 (until 2017: aged 14–70) in Germany
Source: FUR (2026): Reiseanalyse Trend Study 2035 - Holiday demand in the source market of Germany

Holiday travel intensity 1954–2024 and projection until 2035

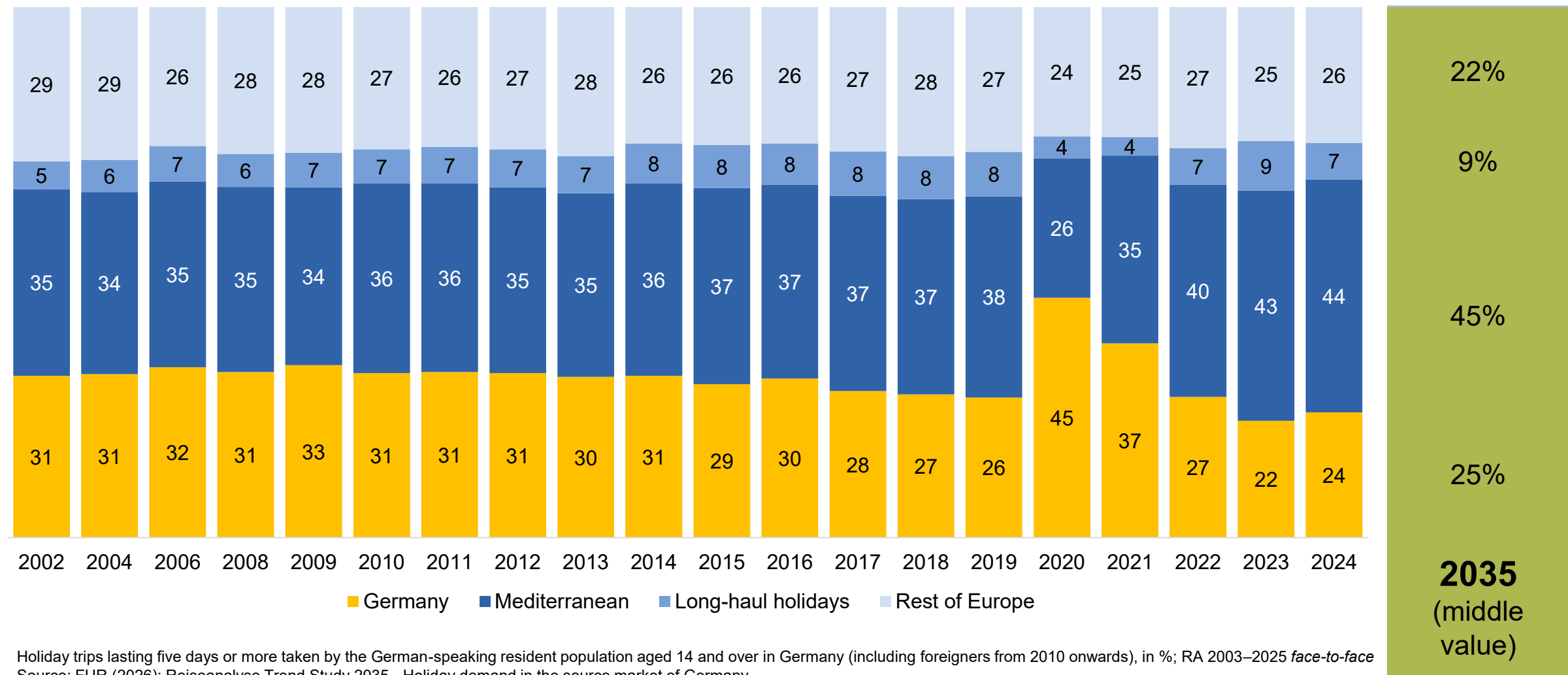


Holiday travel intensity in %

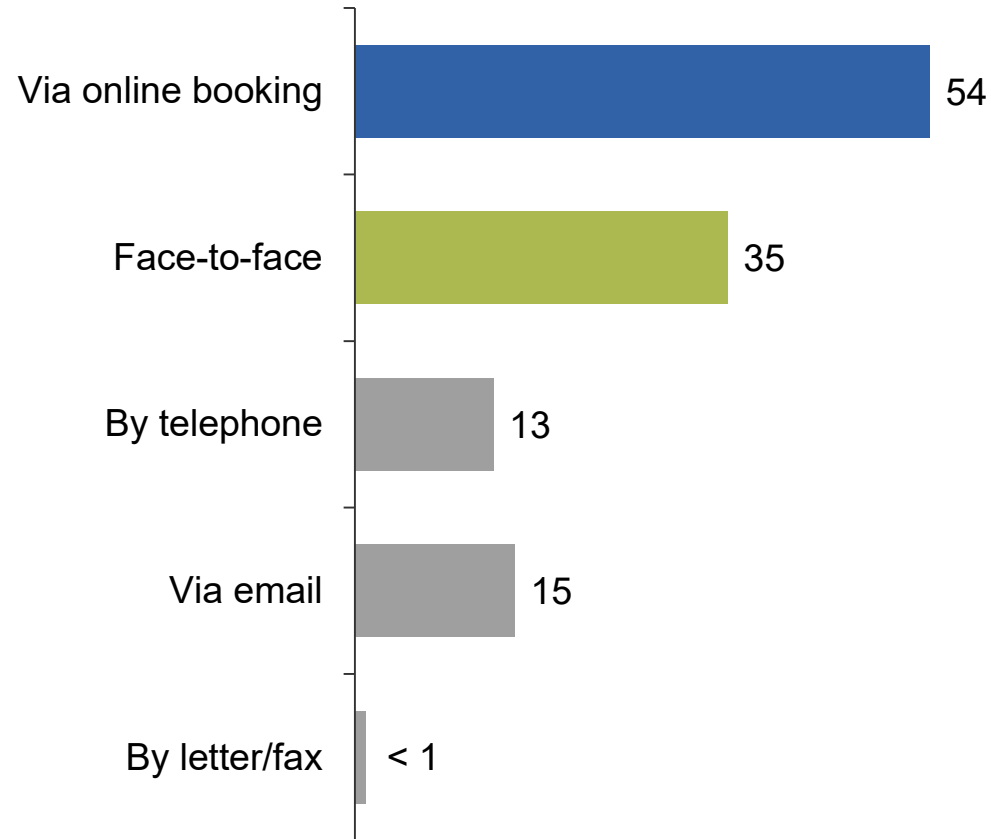
German-speaking resident population aged 14 and over in Germany (until 1989 only West Germany, from 2010 including foreigners), RA 1970–2025 *face-to-face*, 1954–1969: various studies

Source: FUR (2026): Reiseanalyse Trend Study 2035 - Holiday demand in the source market of Germany

Holiday destinations 2002–2024 and projection until 2035



Booking channels: 2024 and trend 2035



Trend 2035:

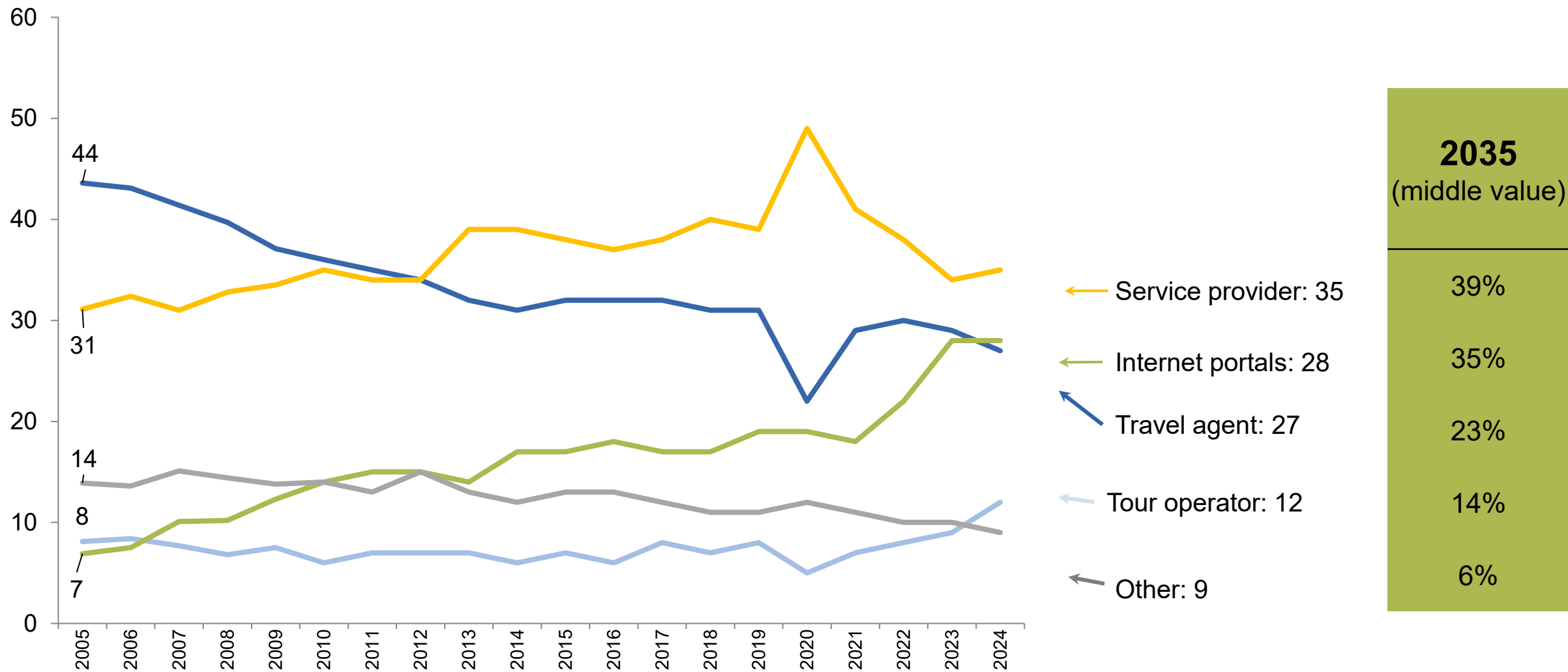
70%
online booking

Trend 2035:

30%
face-to-face

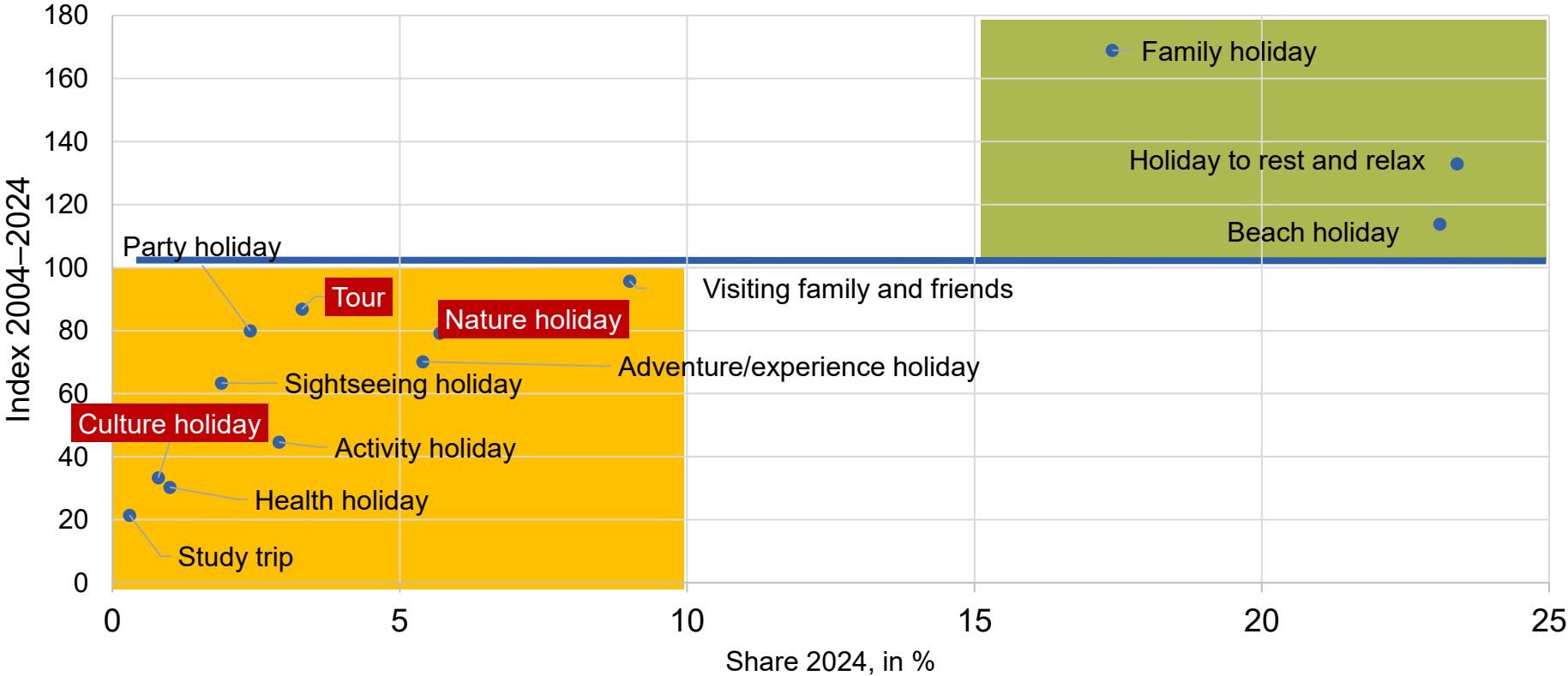
Holidays (5 days or more) with advance booking, in %, total > 100% since multiple responses possible
German-speaking population aged 14 or over, RA 2025 *face-to-face*
Source: FUR (2026): Reiseanalyse Trend Study 2035 - Holiday demand in the source market of Germany

Booking offices 2005–2024 and projection until 2035



Holiday with prior booking lasting five days or more among the German-speaking resident population aged 14 and over in Germany (from 2010 including foreigners), service provider: e.g. accommodation or transport services; percentages, total > 100% as multiple responses were possible; RA 2006–2025 *face-to-face*
Source: FUR (2026): Reiseanalyse Trend Study 2035 - Holiday demand in the source market of Germany

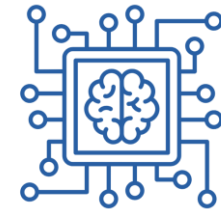
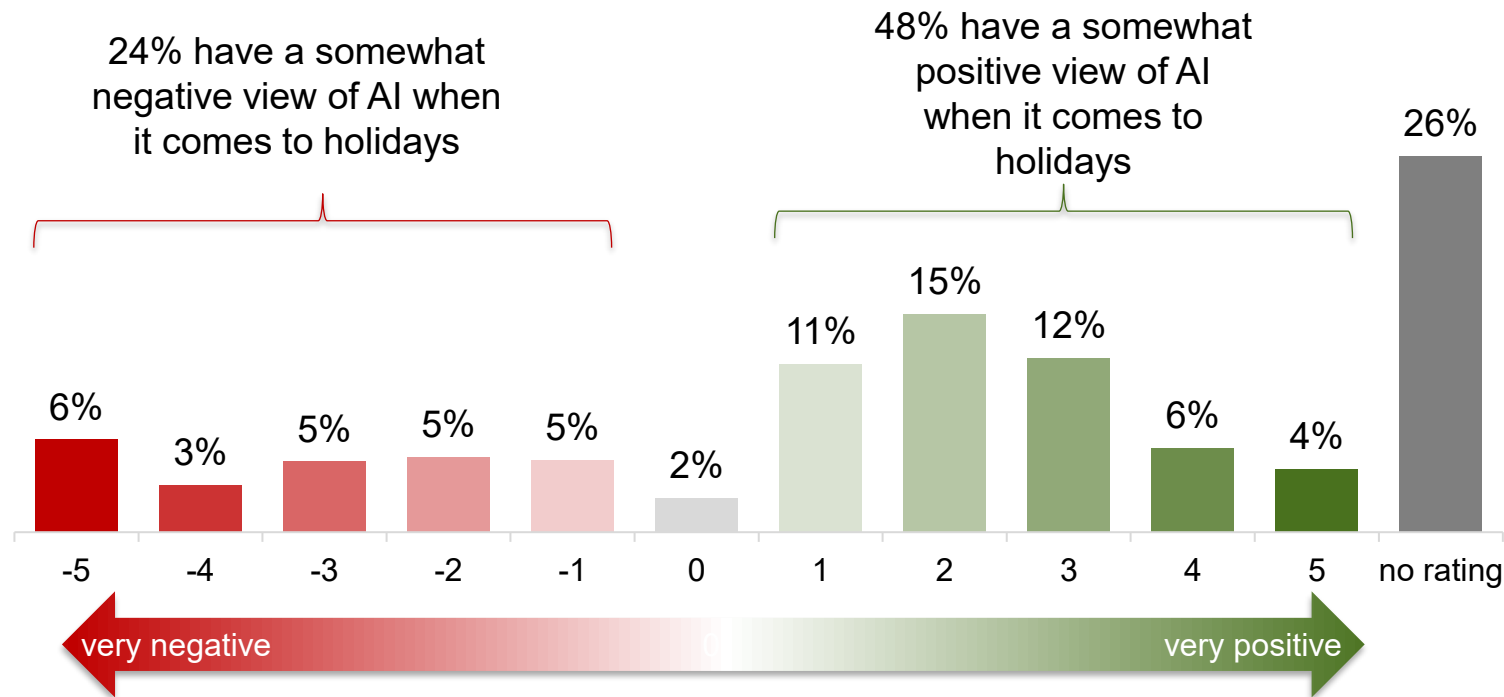
Selected types of holiday travel ‘primarily’: Market share and development 2004–2024



Holiday trips lasting five days or more of the German-speaking resident population aged 14 and over in Germany (from 2010 including foreigners), ‘primary’ type of holiday (single response); 2004–2014: partially different terminology; RA 2005–2025 *face-to-face*
Source: FUR (2026): Reiseanalyse Trend Study 2035 - Holiday demand in the source market of Germany

Attitude of Germans towards the use of AI for holidays

„What are your thoughts on the use of AI-powered applications for planning or going on holidays?“



Question: „Wie sehen Sie die Nutzung von KI-gestützten Anwendungen (z.B. Chatbots, Sprachassistenten oder KI-gestützte Apps) für die Planung oder Durchführung von Urlaubsreisen?“

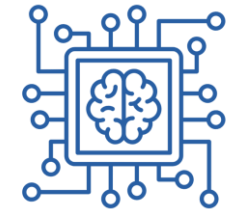
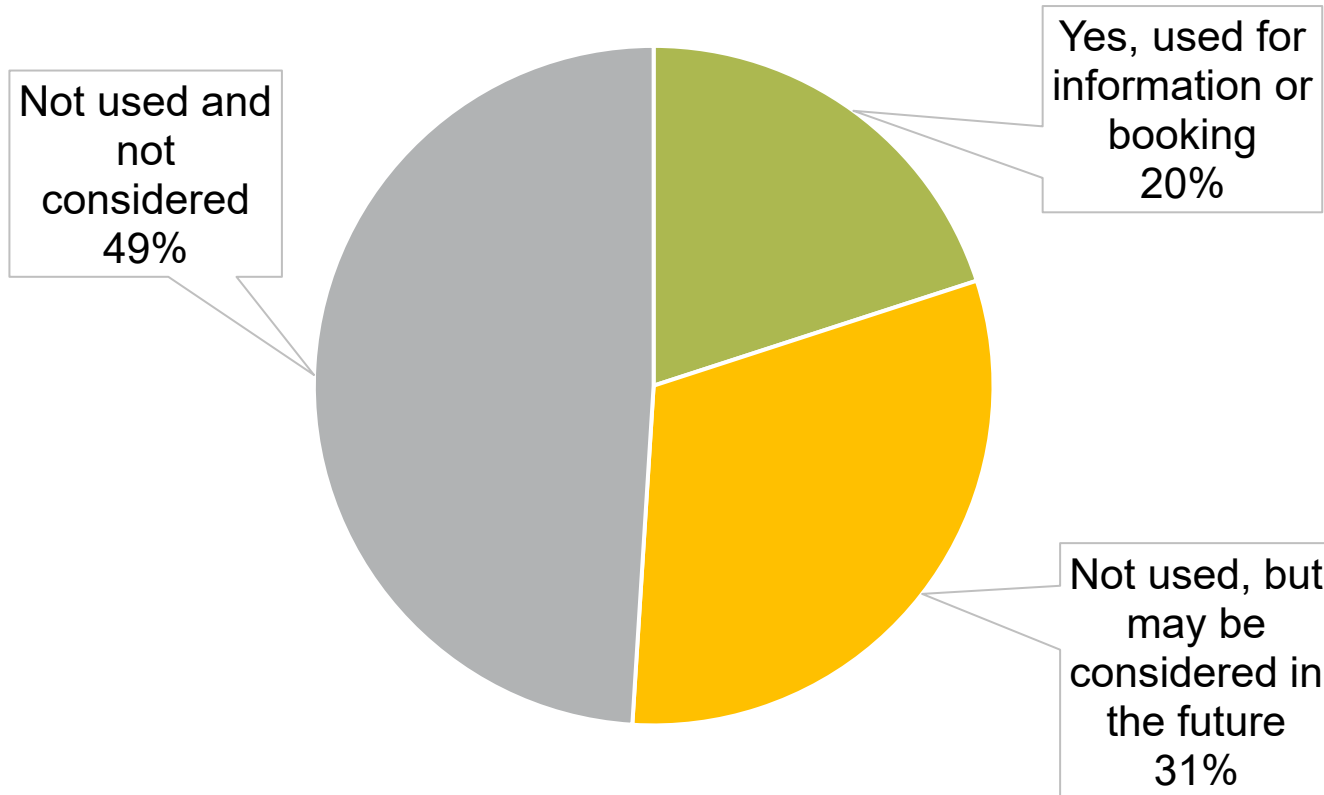
Basis: deutschsprachige Wohnbevölkerung 18-75 Jahre, die in den letzten 12 Monaten eine Urlaubsreise und/oder Kurzurlaubsreise getätigt haben n=1.525

RA 2026, Survey RAonline 9/2025, Source: FUR (2025): Künstliche Intelligenz auf Urlaubsreisen: Nutzung, Einstellung und Potenziale 2025

USE OF AI FOR HOLIDAY TRIPS IN 2025

AI applications were already used for 20% of holiday trips

Did you use AI applications for this trip?



Question: Did you use artificial intelligence in connection with this holiday trip – i.e. during the planning, during the trip or afterwards – artificial intelligence, i.e. AI-supported applications (e.g. chatbots such as Chat GPT or Gemini, voice assistants or AI-supported apps)?

Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2025 lasting 5 days or more

Source: RA 2026, Survey RA online 9/2025

Destination Norway 2026

from the perspective of the German market



- The German holiday travel market remains resilient, supported by strong travel intentions.
 - Norway occupies a relatively small, but stable position within the German outbound market.
 - Nature experiences, exploration and discovering new things are highly relevant travel motives, although sun and relaxation remain the dominant drivers.
 - Cultural motives are generally secondary, but cultural experiences can enhance and differentiate the overall holiday experience.
 - Online platforms and AI-based travel planning tools will become increasingly influential, while travel agents remain important for more complex trips.
- Keep nature and relaxation at the heart of Norway's positioning. Use cultural experiences to enrich, differentiate and deepen the visitor experience.

Photo: Bente Grimm 2021

Your contact person



Jeg snakker
norsk!



Bente Grimm

Head of Tourist Mobility Research

NIT – Institute for Tourism Research
in Northern Europe GmbH

Fleethörn 23, D-24103 Kiel
Tel.: +49 (0)431 666 567 18
bente.grimm@nit-kiel.de
www.nit-kiel.de

Project manager Modules

Forschungsgemeinschaft
Urlaub und Reisen e.V.

Fleethörn 23, D-24103 Kiel
Tel.: +49 (0)431 88888 00
bente.grimm@reiseanalyse.de
www.reiseanalyse.de