

## Travel remains a priority – more digital than ever and increasingly AI-supported

Munich, February 27, 2026 – The German travel market underwent further structural changes in 2025: for 77% of all trips, at least one travel service is now booked online – in 2024, this figure was 74%. At the same time, one in six people in Germany (17%) has already used artificial intelligence for travel planning. This is shown by the evaluations in this year's publication of “VIR Data & Facts of the German Online Travel Market 2026” by [Verband Internet Reisevertrieb e. V. \(VIR\)](#).

Current analyses by [FUR-Reiseanalyse](#) and [Travel Data + Analytics \(TDA\)](#), which are summarized in the “VIR Data & Facts of the German Online Travel Market 2026,” provide insights into the coming travel year.

Despite economic uncertainties, travel remains an integral part of life for people in Germany. The market is showing stability – but with clearly discernible structural shifts.

“Digitalization is no longer just a sales channel; it is the operating system of the market,” says Michael Buller, Head of VIR. “And AI is increasingly becoming an integral part of travel planning.”

### Price awareness is increasing – travel priority remains stable

Price orientation will increase significantly to 54% in 2025 (2024: 46%), returning to the 2019 level. Quality orientation remains stable at 35%. Both luxury and low-budget tourism are declining – travelers are weighing their options more carefully.

Sixty percent say they are saving in other areas of life in order to be able to afford travel. The share of household income spent on travel remains stable at 7.1%, the same level as in 2019.

“Travel remains indispensable for many people. But decisions are being made more consciously – with greater price comparison,” says Ulf Sonntag, Head of FUR Travel Analysis.

Special offers are becoming more important: 41% are specifically looking for low-cost accommodation or special offers.

## Fewer second trips – higher spending per trip

The number of vacation trips lasting five days or more is falling slightly from 68.3 million to 67.7 million. At the same time, total spending is rising by around one billion euros.

The decline is mainly in second vacation trips (from 11.96 million in 2024 to 10.59 million in 2025). In 2019, this figure was still 15.6 million – a structural decline of around five million trips within just a few years.

First vacation trips, on the other hand, are rising slightly (from 56.38 million to 57.13 million).

Short vacation trips are also declining moderately (from 93.8 million to 91.2 million) but remain above the pre-crisis level of 2019.

Average expenditure per person for pre-booked vacation trips of five days or more is rising to €1,429 (2024: €1,399; 2019: €1,088).

“We are seeing a clear shift: fewer additional trips, but more investment in one trip,” explains Ulf Sonntag. “This underscores the importance that vacations continue to have in people's lives.”

## Foreign destinations still clearly preferred – share of flights increases for main trips

Foreign destinations will remain the dominant travel choice in 2025: 78% of all main vacation trips (five days or more) will be abroad – with a continuing upward trend. Accordingly, the share of domestic trips will decline slightly.

There is a clear differentiation in terms of means of transport: the proportion of flights for main vacation trips continues to grow, underlining the strong demand for classic flight destinations, especially in the Mediterranean region and for long-haul trips.

For short breaks, on the other hand, the proportion of flights is declining, while private travel by car is gaining in importance.

“The longer the trip, the greater the international orientation and willingness to fly,” says Michael Buller, CEO of VIR. “For shorter trips, on the other hand, we are seeing greater regionalization.”

There are also differences in booking patterns: the proportion of package tours is increasing for Mediterranean trips, while individual services are more frequently booked for long-haul trips.

“Package tours remain a strong model, especially in the Mediterranean region. For long-haul trips, individualization continues to increase,” says Buller.

## **Tour operator market shows price and structural shifts**

Travel Data + Analytics (TDA) data on the tour operator market show that sales of pre-booked services by German tour operators in 2025 are now 32% above 2019 levels. A further moderate increase of around 3% is forecast for 2026.

“Despite noticeable price increases, demand remains stable – this shows the high priority of travel,” explains Roland Gassner, Director of Business Development at TDA.

The seasonal shift is striking: October 2025 was the month with the highest volume of departures across all sales channels, significantly overtaking July and August. Even when adjusted for holidays, October is one of the fastest-growing months in online tour operator sales. Price-conscious and flexible travelers are specifically taking advantage of cheaper off-season periods.

In the online tour operator market, Turkey, Egypt, and Greece are among the winners when it comes to warm-water destinations. Bulgaria recorded the strongest growth from 2024 to 2025.

Booking behavior is becoming increasingly diversified: 29% of trips booked in November take place nine months or later, while 38% of those booking in September depart within four weeks.

“The market is becoming more flexible – with early planning to secure prices and, at the same time, strong short-term dynamics,” says Gassner.

## **Digitalization reaches new heights**

Digital booking will not only continue to develop in 2025 – it will become the dominant market structure.

For vacations of five days or more, the proportion of bookings made exclusively via websites will rise from 54% in 2024 to 58% in 2025. Bookings via email will also increase – from 15% to 18%.

Across all trips lasting one night or more, the digital share is now 71% – in 2024, this figure was 67%. If hybrid bookings (6%), where multiple channels are used, are added, 77% of all trips are now digitally influenced.

This trend is also evident in vacation trips of five days or more, where the share of digital bookings is rising from 62% to 66%.

For short breaks, the figure is increasing from 83% to 87% – digital channels are almost standard here.

A structural milestone can be seen in package tours: for the first time, more package tours for trips lasting five days or more are being booked digitally (52%) than offline (previous year: 48%).

“Today, digital is no longer an alternative, but the norm,” says Michael Buller, Head of VIR. “We no longer see a gradual shift, but a new market architecture. Digital is now the operating system of tourism. Offers are discovered, compared, and booked digitally – this changes the speed of decisions and transparency in the market.”

Digitalization is not only affecting sales but the entire customer journey – from inspiration to comparison to booking.

“For the industry, this means that visibility, data competence, and digital infrastructure are no longer optional extras. They are prerequisites for competitiveness,” says Buller.

## **AI is becoming part of travel planning at record speed**

Around three years after the widespread breakthrough of generative AI, 10 million people (17%) have already used AI for their travel planning. Another 21.1 million (35%) can imagine doing so in the future. The figures refer to the population between the ages of 18 and 75 in Germany – around 60 million people.

This shows exceptionally rapid consumer adoption: within a few years, generative AI has developed from a new digital phenomenon into a tool that is actively used in everyday travel planning.

“It is remarkable that within just three years, 17% of the adult population is already using generative AI specifically for travel planning,” says Michael Buller, CEO of VIR. “We are seeing a speed of adoption here that is rare in the digital consumer world.”

AI is used for inspiration, comparing offers, and the concrete structuring of trips. Of users to date, 48% rate the suggestions as helpful, and 42% report time savings and satisfaction with the recommendations.

“Generative AI already complements the classic search and booking process. It is no longer an experiment, but is now seen as part of the customer journey and will permanently change the decision-making logic in the travel market,” says Buller.

**Conclusion: Market remains stable – improved sentiment provides support**

In addition to all the structural changes, the latest surveys also show a slight improvement in economic sentiment. Both the assessment of the general economic situation and personal circumstances are viewed more positively than in the previous year.

This improved underlying sentiment is having a stabilizing effect on people's willingness to travel – despite increased price sensitivity.

“People continue to prioritize travel highly. They are making more conscious decisions – and they are using digital channels and AI more naturally than ever before,” says Michael Buller.

The German travel market is therefore not developing spectacularly, but structurally and profoundly: more price-conscious, more digital, and increasingly AI-supported – while demand remains robust.

The data and facts on the online travel market are supplemented by [Pinterest's](#) Travel Trends and information from [ZAUBAR](#) on AI glasses as a new travel interface.

The complete evaluation can be found on the VIR website under: [“VIR Data & Facts on the Online Travel Market 2026.”](#)

### **About VIR:**

The Verband Internet Reisevertrieb e.V. (VIR) has been the central voice of digital tourism in Germany for over 20 years. Its more than 90 member companies are among the leading players in digital travel distribution, including established online travel portals, tour operators, technology providers, and innovative start-ups. According to FUR figures, in 2025, at least one travel service was booked digitally for 77% of trips involving at least one overnight stay. The VIR represents the interests of the industry vis-à-vis politicians, the media, and consumers, promotes innovation and young talent, and raises awareness in the tourism industry for the future-oriented topics of digitalization.

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