

2- Get It Across: VFK German Market Operations

Marketing Activities & Performance

Training & Education: GIA implemented an extensive B2B training and marketing program across German-speaking markets in October 2026 to promote the Florida Keys. Activities included a featured e-learning module on DER Academy, a virtual FVW Destination Day attracting 336 live participants, and a DERTOUR Campus Travel Talk in Luxembourg attended by 22 agents from three countries. Planning for upcoming events includes VUSA seminars in Germany and Austria, a USA Reisen Experte workshop in Cologne, and a dedicated DERTOUR Florida Day planned for April 2026.

Trade Shows & Events: While GIA did not attend BrandUSA Travelweek in London in person, input was delivered to VFK staff prior to meeting. GIA participated in person in a consumer show specialized in North America in Belgium which saw a drop in attendance compared to previous years, which was attributed to the negative socio-economic climate. GIA also confirmed multiple brochure distribution opportunities at consumer shows in the upcoming months on behalf of VFK.

Travel Trade Marketing: In October, GIA was able to secure advertorial placements using B2B2C channels with a tour operator in the Netherlands and a publishing house in Austria, to remain visible within those markets. Additionally, GIA is working on lining up multiple marketing campaigns for the next months to take advantage of the main long haul booking season.

Market Challenges & Responses

The market conditions overall remain challenging given the sub-optimal decisions (for international travel to the US) made by the current administration. The shutdown of the government in October contributed to the negative headwinds, so it remains important to contribute positive destination stories and experiences through sales, marketing and PR activities.

Strategic Positioning

GIA remains dedicated to keeping the Florida Keys top of mind among both consumers and the travel trade across all six core mainland European source markets. We continue to maintain a strong presence with key and niche partners alike, while delivering consistent support, processing 2,208 consumer inquiries and 50 industry requests through October 2025.

Outlook & Recommendations

Currently, we see mounting challenges and structural shifts in the aviation and travel industry across the US and Europe. In the US, a prolonged government shutdown has raised concerns about major flight delays and cancellations, with thousands of air traffic controllers and TSA staff working without pay. In Germany, airlines are under severe pressure from high taxes and operating costs. Lufthansa plans domestic flight cuts, workforce reductions, and a major reorganization while investing heavily in fleet renewal and premium products to restore competitiveness. Condor and Ryanair criticize Germany's cost environment, with Ryanair cutting 800,000 seats and 24 routes and Condor demanding political reforms. Labor tensions persist, with potential pilot strikes looming at Lufthansa. Infrastructure developments include Frankfurt Airport's new Terminal 3 opening in April 2026. Despite airline challenges, tourism

demand remains strong: long-haul travel, cruises, and early bookings are growing, while organized package travel continues to gain consumer trust, so GIA sees that there is still ground for optimism for a successful travel year 2026.



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I. Marketing Activities

I.a Training / Education

1. Meiers Weltreisen DER Academy, November 2024 – November 2025

GIA secured a FKKW feature within the new training module of the B2B platform “DER Academy” highlighting the relaunch of the “Meiers Weltreisen” as DER’s more upscale long haul specialist brand. The FKKW are the only US destination specifically highlighted in the North America section and includes a banner linking to the German FKKW E-Learning, a video, an image gallery, a special recommendation and a product shoutout. By the end of December 2024, a total of 399 travel agents had completed the course which will remain online for a full year. We will receive a further update on registration numbers by the conclusion of the course.

2. FVW Destination Day “South Florida”, October 2025

The Florida Keys were part of a virtual B2B training event together with the destinations of Naples and Sarasota, organized by FVW, the largest German trade publishing house. The “[Destination Day South Florida](#)” was a 2 hour long live broadcast, which was live-streamed on FVW’s website and youtube and which featured a 25 minute long VFK webinar, as well as a 45 minute panel discussion about travel to Southern Florida. During the live broadcast, we had a strong number of 336 travel agents attending. A recording will remain on the FVW website to be accessed by agents. We expect additional agents watching the recording as they can still qualify for the prize raffle (which includes a gift certificate for a 2 night stay at the Reefhouse in Key Largo and flights from AirCanada to Fort Lauderdale) until mid November.

3. DERTOUR Campus Travel Talks, Luxemburg, October 2025

GIA has participated in the B2B training event “Campus Travel Talk” organized by German tour operator DERTOUR in the city of Luxemburg on October 9. VFK was the only destination at the evening event, where we were able to hold a 30 minute presentation and where we were able to network with the participating travel agents throughout the evening. The evening was attended by 22 agents from three countries. A photo of the event can be found here: <https://we.tl/t-UjVkcTfZbv>

4. VUSA Halloween Seminar, November 2025

GIA has registered for participation in the travel market at the annual Halloween Seminar, which is organized by Visit USA Germany in Frankfurt in early November. The event draws usually between 80-100 agents from around Germany, who spent their weekend to attend the in-depth seminar. The Florida Keys will have their own booth at the travel market, where agents are required to stop by in-between workshops.

5. VUSA Austria Seminar, November 2025

GIA has again confirmed participation in the annual Visit USA Seminar in Austria, which is the largest USA focused B2B training event in the Austrian market. The Florida Keys will hold a workshop in the afternoon, followed by a travel market session in the early evening and an evening event, where we will have further opportunities for exposure by participating in interview sessions throughout the dinner event.

6. USA Reisen Experte B2B Event, November 2025

GIA has confirmed participation in a B2B roadtrip training workshop together with North America specialist USA Reisen Experte in Cologne on November 26. The workshop will only feature four US destinations and will be a mix of destination presentations as well as a training for USA Reisen Experte's B2B fly drive planning tool, where the participating agents will be creating roadtrip itineraries within the participating destinations. The event will be limited to 20 agents.

7. DERTOUR Florida Day, April 2026

GIA has confirmed the participation in a dedicated Florida training event, which is planned to take place at the headquarters of DERTOUR, our #1 tour operator, in Frankfurt in April of next year.

I.b Shows / Events

1. Joker Reisbeurs, Mechelen (Belgium), October 2025

GIA has participated in the consumer event "Reisbeurs USA & Canada" which took place on October 19 in the city of Mechelen, Belgium and was organised by Belgian tour operator specialist Joker Reisen. This is a full day consumer event with a long history and is thus very established, drawing crowds with a very strong affinity to North America. VFK had its own table at the travel market and was also be part of the presentation component, where we were part of a larger one hour long Florida presentation. Overall, the show unfortunately was not as well attended as in previous years, which Joker attributed to the difficult socio-political circumstances. Nonetheless, Albert had several good conversations with interested clients. A photo of the event can be found here: <https://we.tl/t-UjVkJctFZbv>

2. Consumer Show Brochure Distribution Program, Winter 2025/26

GIA is currently confirming brochure distribution partnerships with several tour operator and other partners at consumer shows around Germany between November and February, including several Eastern Germany consumer shows together with Fairflight Touristik, CMT in Stuttgart with Ruck Zuck, Vienna with Faszination Fernweh and FREE Munich with Visit USA Germany.

3. Vakantiebeurs Utrecht, January 2026

GIA has registered a booth at the USA pavilion at the Dutch trade and consumer travel show Vakantiebeurs, which will take place in January in the Dutch city of Utrecht. The event starts with a trade day and is followed by several consumer show days. VFK will be part of a USA

pavilion organized by Target Travel. The booth will be manned by Yves Vrielynck, who will be joined for the trade day by Marcel Sprenger.

4. Postponed: Faszination Fernweh Client Event

VFK had originally committed to be part of a Florida & New England client event organised by tour operator specialist Faszination Fernweh, which was scheduled to take place in December. This event had to be postponed due to the main organizer being on extended sick leave. We hope to be able to execute the event at a later point next year. UPDATE SEPTEMBER: We are currently in discussion about potentially doing a consumer show sponsorship with Faszination instead.

II. Travel Trade Marketing

1. AmerikaNu.NI Advertorial [Running]

GIA confirmed the participation in a marketing campaign with Dutch tour operator AmerikaNu.NI. AmerikaNu newly published a glossy travel magazine to highlight their travel products to a targeted clientele (print run of 5,000 copies). VFK secured the placement of a full page advertisement in the magazine and received a 6 page editorial in exchange for the ad placement. The full page ad can be found here: <https://we.tl/t-4XK6E9HGnY>

2. TIP Austria Advertorial [Running]

GIA confirmed the placement of a half page advertorial on the Florida Keys in the [USA Supplement](#) of Austrian B2B magazine "TIP Austria" (Travel Industry Professional). The supplement is used as well at the annual Visit USA Austria Seminar in November as a collateral, but is also added to the regular TIP issue for distribution in travel agencies all across Austria.

3. USA Reisen Experte Florida Sunshine Cashback Campaign [Developing]

To counter negative press about travel to the United States, tour operator specialist USA Reisen Experte has approached us with a newly developed marketing idea. This Florida promotion would be a joint effort by several Florida destinations to promote travel to Florida through a "cashback incentive", where clients who have booked a trip to Florida will be incentivized to publish posts about their experiences on social media using a specific hashtag. The idea is to generate positive buzz by authentic client experiences.

The campaign will have a comprehensive multichannel approach and is scheduled to launch in November and will also be using a newly created Florida fly drive itinerary that will highlight all participating destinations.

4. Exciting West Advertorial Promotion [Developing]

During IPW, GIA has been approached with an interesting and reasonable priced opportunity for an advertorial placement in the next edition of a client magazine produced and published by luxury tour operator Exciting West from Belgium. GIA has confirmed a double page spread in the next fall edition of the magazine but is waiting for input from Exciting West.

5. Journaway Online Promotion [Developing]

GIA is currently in discussion with multiple other Florida destinations and online tour operator Journaway about a potential joint online promotion during late summer. The online promotion would include the creation of a new fly drive itinerary highlighting all participating destinations and a targeted online promotion of that itinerary. Final details (and our commitment) are still under discussion.

6. CANUSA Influencer Gaming Promotion [Developing]

CANUSA, one of our top 3 tour operator partners, has approached us with a very innovative marketing idea surrounding the launch of the next part of the highly popular video game series "GTA", which is scheduled to take place in May 2026. The story of the open world game GTA VI will be taking place in the fictional city of Vice City, a swamp region called Grassrivers and a tropical island chain called Leonida Keys – which are based on Miami, Everglades NP and the Florida Keys. CANUSA's idea is to create a special "GTA VI" themed fly drive itinerary to those three real world areas and promote this using a Twitch gaming streamer (Papaplatte) who has a reach of more than 1.3 million followers. The streamer would be traveling to the Keys in the time leading up to the launch of the game and would be livestreaming his trip to his large following while promoting destination awareness but also the bookable CANUSA itinerary.

7. HeyUSA Podcast Promotion [Developing]

GIA is currently in discussion with Belgian media company HeyUSA about a small promotion to highlight destination awareness of VFK in the Belgian market by producing a Florida Keys themed podcast using Belgium born Yves Vrielynck as a testimonial. The podcast is planned to be produced in Q4 of 2025 and will be additionally promoted with VFK newsletter and social media posts.

8. Travel Trend Online Promotion [Developing]

GIA is also currently in discussion with Dutch tour operator Travel Trend about the creation of either a stand-alone Florida Keys marketing proposal or a joint Florida promotion. We have informed product manager Peter van Veenendaal about our intent but are still waiting for a specific proposal.

III. VFK Internal

1. Ongoing discussions with VFK staff about planned marketing activities
2. Wrapped up FY25 budget and invoices and connected bookkeeping issues
3. Delivered input for BrandUSA Travelweek appointments to Yves
4. Coordinated input with media department in November

IV. Travel Trade Assistance

1. HeyUSA, Antwerp(Belgium)

Continued conversation with Sebastiaan Klijnen from Belgian media company HeyUSA to discuss potential podcast promotion and media visit in FY26

2. CANUSA, Hamburg

Kept in conversation with Alexandra Wirsum to discuss potential creative gaming / influencer promotion in FY26 surrounding launch of video game GTA VI

3. Journaway, Leer

Discussed details for potential online campaign together with other Florida CVB partners and online tour operator Journaway

4. USA Reisen Experte, Bergheim

Confirmed and sent input for cashback campaign together with tour operator USA Reisen Experte and various other Florida partners in FY26; also confirmed participation in B2B event in November

5. Geoplan Reisen, Berlin

Continued discussions about a potential Florida marketing campaign together with tour operator Geoplan in next fiscal year; waiting for more details

6. FVW Medien, Hamburg

Followed up on South Florida virtual training event together with trade publisher FVW Medien in October

7. Travel Trend, Rotterdam (Netherlands)

Discussed further details for planned marketing campaign, waiting for specific proposal

V. OVERVIEW of fulfillment requests

2025	DISTRIBUTION VIA INFOX, GIA & EVENTS	
Month	Consumer	Travel Industry
January	113	4
February	224	5
March	158	7
April	26	4
May	123	5
June	724	3
July	515	7
August	34	4
September	217	5
October	174	6
November		
December		
TOTAL	2,208	50

VI. German Market Update

US Government Warns of Flight Cancellations Due to Shutdown

The government shutdown in the US, which has been ongoing for 23 days, threatens to severely disrupt air traffic. Thousands of air traffic controllers and security personnel are having to work without pay. The US government expects significant delays and cancellations.

The US government has warned of disruptions to air traffic due to the closure of federal agencies caused by the budget dispute. "We fear that there will be significant flight delays, disruptions, and cancellations at major airports across the country," said White House spokeswoman Karoline Leavitt. This could also affect travel over the holidays.

"If the Democrats continue to paralyze government agencies, they will also paralyze American air traffic," she added. The opposition Democrats immediately rejected the accusation.

Due to the government shutdown, which has been going on for 23 days, air traffic controllers will have to forego their monthly salary payment next Tuesday. Around 13,000 air traffic controllers and approximately 50,000 employees of the Transportation Security Administration (TSA) are having to work without pay during the government shutdown.

(airliners.de from Oct 24, 2025)

Lufthansa CEO Cuts Domestic Flights

In an interview with Welt am Sonntag, Lufthansa CEO Carsten Spohr said that without relief, further "cuts are inevitable." "We are talking about around 100 domestic flights per week that could be canceled next summer." Among others, the Munich–Münster/Osnabrück and Munich–Dresden routes are under review. One of the main problems is that pre-coronavirus levels have not yet been reached, particularly among business travelers.

"Is our country, with its structures and, of course, its prosperity that has grown over decades, capable of radical changes of direction in order to change and improve the economic framework conditions? I believe there are question marks here. Even if that were the case, how many of our framework conditions are defined by Brussels?" said Spohr.

"And what is the feeling about Europe as a business location, about the importance of the major nations in Europe? That worries me. Listening is not enough. We finally need action (...). Ultimately, it's not just about the big companies, but also about the citizens of our country."

Spohr continued: "We are not threatening anything. Unfortunately, things have already happened (...) that have resulted in enormous cuts. This winter, we will only see an absurd 16 percent of flights – within Germany and outside the hubs – compared to last year before Covid."

(FVW Online, October 24, 2026)

What Condor CEO Peter Gerber is Demanding from German Politicians

The aviation industry in Germany is struggling with high location costs. Key industry representatives say that reforms are urgently needed to keep up with the rest of the world.

According to Condor CEO Peter Gerber, the federal government should cover the costs of the military's share of air traffic control. This could reduce civil fees by 30 percent and provide noticeable relief for the aviation industry, said the president of the Federal Association of German Airlines (BDF) at an event at Frankfurt Airport. It is also common practice in other European countries for the state to bear the costs of military air traffic control.

In general, the industry is complaining about government-imposed location costs, which have doubled since 2019 and led to significantly higher ticket prices and reduced demand.

In terms of air traffic, Germany is the sick man of Europe, Gerber said. An important first step would be to reverse the increase in air traffic tax, which has already been agreed in the coalition agreement but has not yet been implemented. The fees for aviation security checks at airports are also too high. Important industrial regions in Germany are losing their connection to the global economy due to high costs, said Lufthansa's Chief Human Resources Officer Michael Niggemann. He confirmed that further domestic connections to the Frankfurt and Munich hubs are under review because they are loss-making. He also called on the federal government to work at the European level to ensure fair competition. It is time, he said, to finally recognize the strategic relevance of air transport in global competition. The event was organized by the Association of Hessian Business Associations.

Ryanair cuts 800,000 seats and 24 Routes to/from Germany

Ryanair has announced major changes to its network in and out of Germany for the upcoming Winter 2025/2026 season, cutting roughly 800,000 seats and canceling 24 routes. Rather uniquely, these cuts aren't due to low demand or excessive losses (at least in the company's words), but rather due to issues with recent taxes and policies implemented by the German government. Ryanair has long criticized the country's high airport charges and taxation policies, warning that they discourage airline growth, reduce passenger traffic, and ultimately harm tourism and connectivity.

Details Of Ryanair's Newest Cuts

Ryanair is cutting flights at a total of nine "high cost" German airports, including Berlin-Brandenburg, Hamburg, and Memmingen. In total, the carrier is cutting 24 routes and reducing capacity by roughly 800,000 seats, which will bring capacity in its German network below Winter 2024 levels. These are significant reductions, especially in a market as large as Germany.

These reductions are part of Ryanair's broader strategy to redeploy capacity to markets with lower operating costs and stronger incentives for airlines. In past seasons, the carrier has frequently shifted aircraft to countries like Italy, Spain, and Poland, where airport fees and taxes are lower and government policies are more supportive of growth. The cuts are expected to impact not only leisure travelers but also regional connectivity within Europe. Ryanair's presence has been a key driver of low-fare travel from secondary German cities, and these reductions could result in higher fares and fewer options for passengers in affected regions. Ryanair emphasizes that its current decision could be reversed if the German government changes course, which would be beneficial for consumers.

Ryanair Making A Political Statement

It's uncommon for most airlines to make political statements, but Ryanair is a bit unique. It has strong leverage in much of Europe due to its size, and it thrives on publicity to increase public awareness. Everyone in Europe knows what Ryanair is, and actions like publicly deriding a government all contribute to the high level of public awareness. Any publicity is good publicity.

By putting this relatively long and harshly worded statement to the public, Ryanair is attempting to strong-arm Germany and to make sure everyone knows it. The company survives by keeping operating costs low, and with high access costs and increased taxes, operating in Germany is anything but cheap. Ryanair hopes that the cuts will incentivize Germany to reverse the recent aviation tax increases.

Reducing Capacity Cutting All Service

Baden-
Württemberg
Berlin-Brandenburg
Cologne
Frankfurt-Hahn
Hamburg
Memmingen

Dortmund
Dresden
Leipzig

Make no mistake, Ryanair's true intentions are to return to the cut capacity, but without the new taxes. It's taking this public to drum up support from its customers and those who may not be as aware of the recent changes in the aviation industry. It frames its cuts as a negative for the traveling public, and it frames itself as being cut out of the market due to the actions of the government. This turns public sentiment against the government, which could lead to the taxes being reduced or eliminated.

Market Impact Of The Upcoming Changes

Ryanair is shifting aircraft that were originally based in Germany to other countries, such as Italy and Spain. It focuses on nations with low operating costs (though it has publicized issues with even lower-cost nations as well), and it searches for airports that offer low fees or incentives, which improves the economics of many of its routes. However, if the aviation taxes in Germany are reduced or reversed, then Ryanair promises to add even more capacity than it offered before.

For Germany, the reduction could have knock-on effects on tourism and regional economies. Germany is a nation dominated by Lufthansa Group and Condor, with high operating costs making it difficult for budget airlines to enter the market. As such, Ryanair's network has been instrumental in bringing inbound leisure traffic to smaller German cities, and reduced service may impact local hospitality and tourism sectors.

(SimpleFlying, Oct 16, 2025)

What Lufthansa is now building its future on

The situation is challenging: the Lufthansa Group is struggling with high costs, among other things, but also needs to invest in its fleet and products in order to keep up with the competition. This is naturally a source of concern for Lufthansa CEO Carsten Spohr: his Lufthansa is lagging significantly behind the competition in terms of profitability. While his group's operating margin in 2024 was only around 4.4%, competitors such as the International Airlines Group (IAG), comprising British Airways, Iberia, and Aer Lingus, achieved a respectable 13.8%, and Air France-KLM still managed 5.1%

Despite strong passenger demand, Lufthansa suffers from disproportionately high operating costs. There are several reasons for this: On the one hand, taxes and fees for airlines in Germany are above average compared to other countries. On the other hand, the Lufthansa Group itself operates with a comparatively bloated administration. As a result, 4,000 administrative jobs are now to be cut by 2030 and existing duplicate structures are to be eliminated.

Jobs are also to be relocated: there is talk of 1,500 full-time positions being moved to other international locations within the group. This means that a disproportionate number of jobs are likely to be cut at the Frankfurt headquarters. Sales, network planning, and other functions will

also no longer necessarily have to be managed from Frankfurt in the future, according to the company.

There are other problems that Lufthansa CEO Spohr has identified and is addressing, but none of them will lead to better figures overnight: The turnaround of the core Lufthansa brand, for example, was already initiated last year and is now expected to have an economic impact in 2026. First, however, the focus was on stabilizing flight operations, i.e., increasing reliability and punctuality and thus polishing the reputation of the core brand. And that cost more money at first.

In addition, investments in the fleet were needed to enable more sustainable and fuel-efficient flying. Many of the jets have yet to be delivered: the Lufthansa Group expects to take delivery of more than 230 new aircraft by 2030, including 100 long-haul jets.

The cabin also urgently needed to be refurbished: the new long-haul product Allegris is now available on more and more aircraft. However, it will be several years before it is available across the entire fleet. In addition, the Lufthansa Group is constantly battling with unions that oppose restructuring and efficiency programs and initiate labor disputes.

Lufthansa Group facing reorganization

On Monday in Munich, Lufthansa confirmed to analysts and investors that it would be adjusting the organizational and operational structure of the group and reorganizing the group.

In addition to fleet renewal, Lufthansa is now specifically addressing the following issues:

Network airlines: As reported, the individual airlines serving the hubs are to be relieved of certain tasks and group functions are to be centrally managed from 2026. The project behind this is called Matrix Next Level and affects the Lufthansa, Swiss, Austrian Airlines, Brussels Airlines, and ITA Airways brands. Their commercial offerings are to be managed centrally in the future, making them more efficient. Among other things, network planning for all hub airlines is to be carried out from a single source.

At Lufthansa Airlines: Here, the Turnaround Transformation Program is expected to bring decisive success. The new Allegris cabin product is expected to generate additional revenue. Lufthansa Airlines CEO Jens Ritter has also just presented a new in-flight product called FOX and promised optimizations in terms of food and other cabin services. Management also has high hopes for the use of digital services. In particular, the app and the (information) possibilities it offers are intended to make flying with the crane carrier a better experience for travelers. With regard to consolidation in Europe, the LH-Group wants to continue to play a role and is promising rapid integration of ITA Airways. This is to serve as a model for further possible acquisitions in Europe. Among others, Spohr would like to acquire TAP in Portugal. The process is ongoing and requires patience.

(FVW Online, September 29, 2025)

The Stalemate between Condor and Lufthansa is over

Lufthansa and Condor are currently working together on feeder flights via an interline agreement. However, Peter Geber would like to see better conditions and has therefore been seeking talks with the Lufthansa Executive Board for some time. Even though the high-ranking Lufthansa committee has given assurances that it is “in talks with Condor,” it sees no reason to offer its competitor Condor different terms than other competitors on the market due to the current legal situation.

Condor initially successfully fought back at the Federal Cartel Office, which viewed Lufthansa's move as an abuse of its dominant market position. The dispute continued before the Higher Regional Court of Düsseldorf, which issued a final ruling in the main proceedings at the end of August this year. The Federal Cartel Office's decision that Condor was entitled to feeder flights by Germany's largest airline was overturned. However, this was justified on the grounds of procedural errors.

It is now clear that the decision is effective. Neither the Federal Cartel Office nor Condor have lodged an appeal against it.

In theory, the Federal Cartel Office could reopen the proceedings, as the competition violation in this case was not dealt with legally, but the ruling was based purely on procedural errors. This would take years. Whether the Federal Cartel Office will take this step remains to be seen. It was not available for comment on Tuesday.

Condor CEO Peter Gerber has long since decided to build up his own city network, which is now gradually being consolidated. However, he sees his scope as limited due to the scarcity of slots in Frankfurt, which is partly due to the market leader Lufthansa.

Condor hopes for EU Commission

Gerber still has one last straw to clutch at in the whole dispute. A case is pending before the EU Commission in Brussels, the outcome of which could have an impact. It concerns the framework conditions of the A++ joint venture between Lufthansa, United, and Air Canada, which are currently being reviewed and also include competition requirements. These apparently state that the joint venture must allow other airlines access to the Frankfurt hub, in particular through feeder flights. Condor is hoping that the EU will impose conditions in its favor.

(FVWOnline, Sept 30, 2025)

Lufthansa: Talks Fail – Pilot Strike Looms

After fruitless talks between the airline and the pilots, strikes are looming. The pilots' union plans to discuss how to proceed this week.

No agreement has been reached in the talks between the pilots' union and Lufthansa. The bargaining committee will reassess the situation next week and discuss how to proceed, according to a statement by the Vereinigung Cockpit (VC) pilots' union. In a ballot vote, its members have already declared their willingness to strike, as reported by tagesschau.de.

The VC stated that it now wants to return to the original collective bargaining issues. The union is fundamentally in a position to start a strike at Lufthansa's core brand and its cargo subsidiary Lufthansa Cargo at any time.

Medium-haul fleet to be outsourced for cost reasons

One of the issues in dispute is the future of the medium-haul fleet, which management wants to transfer to the subsidiaries City Airlines and Discover for cost reasons. For Lufthansa pilots, this would mean fewer jobs and career opportunities. The VC is therefore seeking an overall concept for the European fleet that also includes collective agreements for pilots at the subsidiaries.

From the perspective of bargaining committee chairman Arne Karstens, management has linked its initial offers to significant concessions from the pilots that are unacceptable. A Lufthansa spokesperson declined to comment on details. The airline continues to focus on talk

(Berliner Zeitung, Oct, 27, 2025)

Frankfurt Terminal 3 to open next April

After ten years of construction, 19 million passengers will soon be able to take off or land here every year: According to plans, the third terminal at Frankfurt Airport will open in April 2026. Fraport CEO Stefan Schulte announced the date for the opening of Terminal 3 (T3) on Wednesday in Frankfurt. “The first flight will take off on April 23,” said Schulte.

Final touches are being made to the arrivals area of Terminal 3. Travelers are expected to arrive here for the first time in April 2026. Gates G, H, and J offer a total capacity of 19 million passengers. It can be expanded to accommodate up to 25 million passengers and would be about the size of Germany's fourth-largest airport in Düsseldorf on its own.

Before the launch, there will be an extensive test phase for which the airport operator is looking for test subjects. According to Fraport, a total of 80,000 volunteers have already signed up for a test run, with preliminary talks already underway with 14,000 of them. There will be special test days for people with limited mobility. Interested parties can continue to register, according to a Fraport spokesperson.

state of Hesse, citizens' initiatives, and surrounding communities. After ten years of construction, the project is now in its final phase. Up to 2,000 people work on the construction site every day.

With costs of around four billion euros, it is one of the largest privately financed infrastructure projects in Europe, according to Fraport.

All airlines from Terminal 2 that do not belong to Lufthansa and the Star Alliance are moving to T3. That is a total of 57 airlines, which will then move in four waves, as Fraport CEO Schulte reported. T2 will then be completely renovated by the early 2030s.

Since the coronavirus pandemic, Germany's largest airport has not yet reached its record number of 70.6 million passengers in 2019. Fraport forecasts 64 million travelers for this year. In the long term, more than 100 million passengers are expected.

(ARD Tageschau, Oct 10, 2025)

Long-haul travel and early bookings dominate the industry

As the 2025 summer travel season draws to a close, the industry is already looking ahead to the coming winter – which promises to be a strong season from a tourism perspective. According to a study commissioned by the German Travel Association, revenues and the number of travelers are on the rise.

Revenues in winter 2025/26 will increase by nine percent compared to the previous year. The number of travelers will grow by six percent. At least, that is what the statisticians at Travel Data + Analytics (TDA) have gleaned from their data for winter 2025/26 on behalf of the German Travel Association (DRV) and published at the DRV Capital Congress 2025.

Long-haul travel is booming – Africa and Asia in the lead

Long-haul travel is particularly in demand. Sales are up eleven percent, and guest numbers are rising by eight percent. The desire to escape winter is causing a boom in destinations in Africa (Egypt, Tunisia, Morocco; South Africa, in total up 25%), Southeast Asia (up 16%), the Indian Ocean, and the Middle East.

These regions now account for almost three-quarters of total long-haul travel revenue. The Caribbean and South America remain stable, while the US is losing ground significantly, with a 27% decline in revenue compared to the previous winter.

Cruises with a high proportion of early bookers

Cruises are also continuing their growth trajectory: eight percent more revenue, and early bookers already account for around 30 percent of all winter bookings – proof of the growing importance of this segment.

Classic medium-haul sun destinations are also in demand: the Canary Islands and destinations such as Egypt and Turkey each recorded a 10% increase in revenue.

Summer results: stable with price-conscious favorites

Even though the summer season does not officially end until the end of October, the DRV is already drawing a predominantly positive conclusion: a 6% increase in sales with a very stable number of guests (+1%). Affordable sun destinations were particularly popular in the summer: Bulgaria stands out with a 41% increase in sales, while Thailand (+ 18% percent) and Egypt (+ 17%) also saw strong growth. Turkey remains the number one summer destination, especially for families.

Flexibility remains key

Early booking trends go hand in hand with a need for security: many travelers are opting for flexible packages that allow for last-minute re-bookings or cancellations. Traditional package tours continue to gain trust – not least thanks to the proven crisis management of tour operators and statutory insolvency protection.

The fact is, at least for now, that whether it's a long-haul trip, a cruise, or an affordable Mediterranean destination, Germans remain keen to travel. The trend is clearly toward early booking and security. The organized tour operator market is benefiting from this development and remains the first choice for many vacationers.

“It is encouraging that the season has started with a strong early booking rate. This shows that package tours offered by tour operators continue to grow in popularity among customers,” said DRV President Norbert Fiebig, explaining the figures.

(FVWOnline, Oct 9, 2025)

2- Get It Across: VFK German Market Operations

Marketing Activities & Performance

Training & Education: GIA participated in two Visit USA seminars in November 2025, engaging 86 agents in Germany and 78 in Austria (32 in afternoon workshops). At these events, 75 Florida Keys guides were distributed. A third B2B roadtrip event for 20 agents in Cologne was postponed to 2026, additional training events are currently being discussed with potential partners to remain on top of mind of the Point of Sales.

Trade Shows & Events: No tradeshow were executed in our markets in November 2026, but the Florida Keys were brochure distribution partners at two consumer shows in Northern and Eastern Germany. Further brochure distribution options have been secured in Germany and Austria for the upcoming months. In addition, GIA and VFK are planning attendance at Dutch trade and consumer show Vakantiebeurs in January.

Travel Trade Marketing: In November, GIA launched two consumer promotions in both Austria and Germany with selected tour operator partners and lined up three additional marketing campaigns for the upcoming months.

Market Challenges & Responses

The market conditions overall remain challenging given the sub-optimal decisions (for international travel to the US) made by the current administration. Recent news that the National Park passes for foreign travelers will increase significantly has not been received positively. Further negative news about socio-economic developments in the US added to a rather unhelpful image, which makes it all the more important to contribute positive destination stories and experiences through sales, marketing and PR activities.

Strategic Positioning

GIA continues to put the Florida Keys front and center for consumers and travel trade professionals across all six key European source markets. By nurturing relationships with both top-tier and niche partners, we ensure consistent engagement and support, having successfully handled 2,467 consumer fulfillment inquiries and 55 industry requests through November 2025—keeping the Keys top of mind and top of choice.

Outlook & Recommendations

The economic situation in regards to travel in Germany is currently a mixed bag. The 2025 summer season delivered record travel revenues of around €16 billion, driven mainly by higher prices rather than volume, as bookings rose only slightly. Last-minute travel and autumn holidays performed strongly, while online bookings continued to gain share. The winter season has started positively, with rising sales, strong early booking momentum, and robust demand for long-haul travel, cruises, and destinations such as Egypt.

The Dertour Group for example reported solid growth, fueled by early bookings, long-haul demand, and a trend toward “affordable luxury,” all-inclusive offers, and flexible rates. Tunisia, East Africa, the Caribbean, and Canada are strong performers, while the US is seeing double-digit declines, partly due to political perceptions and higher prices. Despite strong travel demand, overall consumer confidence in Germany remains weak, with cautious spending expected during the Christmas season. Retailers anticipate only modest growth, highlighting ongoing economic uncertainty alongside a resilient desire to travel.



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3.	VUSA Halloween Seminar, November 2025	
3.	VUSA Austria Seminar, November 2025	
4.	POSTPONED: USA Reisen Experte Event, November 2025	
5.	DERTOUR Florida Day, Frankfurt, April 2026	
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3.	TIP Austria Advertorial Promotion	
4.	HeyUSA Podcast Promotion	
5.	CRD Select Luxury Promotion	
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I. Marketing Activities

I.a Training / Education

1. Meiers Weltreisen DER Academy, November 2024 – November 2025

GIA secured a FKKW feature within the new training module of the B2B platform “DER Academy” highlighting the relaunch of the “Meiers Weltreisen” as DER’s more upscale long haul specialist brand. The FKKW are the only US destination specifically highlighted in the North America section and includes a banner linking to the German FKKW E-Learning, a video, an image gallery, a special recommendation and a product shoutout. By the end of December 2024, a total of 399 travel agents had completed the course which will remain online for a full year. We are currently waiting for a final report with a total number.

2. FVW Destination Day “South Florida”, October 2025

The Florida Keys were part of a virtual B2B training event together with the destinations of Naples and Sarasota, organized by FVW, the largest German trade publishing house. The “[Destination Day South Florida](#)” was a 2 hour long live broadcast, which was live-streamed on FVW’s website and youtube and which featured a 25 minute long VFK webinar, as well as a 45 minute panel discussion about travel to Southern Florida. During the live broadcast, we had a strong number of 336 travel agents attending. A recording will remain on the FVW website to be accessed by agents. We expect additional agents watching the recording as they can still qualify for the prize raffle (which includes a gift certificate for a 2 night stay at the Reefhouse in Key Largo and flights from AirCanada to Fort Lauderdale) until mid November.

Update November: A winner has been confirmed (a travel agency in Oldenburg); a total of 1,259 agents watched the broadcast recording, which brings the tally to 1,595 travel agents reached through this promotion.

3. VUSA Halloween Seminar, November 2025

GIA has participated in the travel market at the annual Halloween Seminar, which was organized by Visit USA Germany in Frankfurt in early November. The event drew 86 agents from around Germany, who spent their weekend to attend the in-depth seminar. The Florida Keys had their own booth at the travel market, where agents were required to stop by in-between workshops. We received multiple relevant enquiries from interested agents and distributed 35 holiday guides and other collaterals. A photo of the event can be found here: <https://we.tl/t-UjVkcTfZbv>

4. VUSA Austria Seminar, November 2025

GIA has again participated in the B2B training event “VUSA Austria Seminar” organized by the Austrian Visit USA committee in Vienna on November 11. VFK also participated as a workshop partner in the separate afternoon workshop session, where we had the opportunity to train agents more indepth. At the main event in the evening, VFK was part of a travel market with its own table and was featured during the sit-down dinner event as an interview partner on-stage. The event was better attended than in previous years with 78 agents overall including 32 agents at the afternoon workshops.

Albert Jennings attended the event on behalf of Visit Florida Keys and one other destination clients, so we were able to split both the travel expenses and the agency fee in half.

5. POSTPONED: USA Reisen Experte B2B Event, November 2025

GIA has confirmed participation in a B2B roadtrip training workshop together with North America specialist USA Reisen Experte in Cologne on November 26. The workshop will only feature four US destinations and will be a mix of destination presentations as well as a training for USA Reisen Experte's B2B fly drive planning tool, where the participating agents will be creating roadtrip itineraries within the participating destinations. The event will be limited to 20 agents. Update November: A week before the event was scheduled to take place, USA Reisen Experte informed us that multiple agents had to rescind their participation due to high workload, so we mutually agreed that it's best to postpone the event to another date in Q1/Q2 of 2026. We will work on finding a new date in the upcoming weeks.

6. DERTOUR Florida Day, April 2026

GIA has confirmed the participation in a dedicated Florida training event, which is planned to take place at the headquarters of DERTOUR, our #1 tour operator, in Frankfurt in April of next year.

I.b Shows / Events

1. Consumer Show Brochure Distribution Program, Winter 2025/26

GIA has confirmed brochure distribution partnerships with several tour operator and other partners at consumer shows around Germany between November and February, including several Eastern Germany consumer shows together with Fairflight Touristik, CMT in Stuttgart with Ruck Zuck and Vienna with Faszination Fernweh. Unfortunately, Visit USA had to pull out of their show presence in Munich, but we are currently working on identifying other partners for brochure distribution at that show.

2. Vakantiebeurs Utrecht, January 2026

GIA has registered a booth at the USA pavilion at the Dutch trade and consumer travel show Vakantiebeurs, which will take place in January in the Dutch city of Utrecht. The event starts with a trade day and is followed by several consumer show days. VFK will be part of a USA pavilion organized by Target Travel. The booth will be manned by Yves Vrielynck, who will be joined for the trade day by Marcel Sprenger.

II. Travel Trade Marketing

1. USA Reisen Experte Florida Sunshine Cashback Campaign [Developing]

To counter negative press about travel to the United States, tour operator specialist USA Reisen Experte has approached us with a newly developed marketing idea. This is a multi-destination Florida promotion called "[Sunshine Stories](#)" with specialist TO USA Reisen Experte. To counter

negative press about travel to the United States, tour operator specialist USA Reisen Experte had approached us with a newly developed marketing idea. This Florida promotion is a joint effort by several Florida destinations to promote travel to Florida through a “cashback incentive”, where clients who have booked a trip to Florida will be incentivized to publish posts about their experiences on social media using a specific hashtag. The idea is to generate positive buzz by authentic client experiences. The campaign has a comprehensive multichannel approach and was launched in November incentivizing people booking Florida trips through February and is using a newly created [Florida fly drive itinerary](#) that highlights all participating destinations. It furthermore includes a stand alone VFK B2C newsletter, various social media elements, B2B online ads, conversion ads and a B2B newsletter.

2. AmerikaNu.NI Advertorial [Running]

GIA confirmed the participation in a marketing campaign with Dutch tour operator AmerikaNu.NI. AmerikaNu newly published a glossy travel magazine to highlight their travel products to a targeted clientele (print run of 5,000 copies). VFK secured the placement of a full page advertisement in the magazine and received a 6 page editorial in exchange for the ad placement. The full page ad can be found here: <https://we.tl/t-4XK6E9HGnY>

3. TIP Austria Advertorial [Running]

GIA confirmed the placement of a half page advertorial on the Florida Keys in the [USA Supplement](#) of Austrian B2B magazine “TIP Austria” (Travel Industry Professional). The supplement is used as well at the annual Visit USA Austria Seminar in November as a collateral, but is also added to the regular TIP issue for distribution in travel agencies all across Austria.

4. HeyUSA Podcast Promotion [Developing]

GIA has confirmed a small promotion with Belgian media company HeyUSA about to highlight destination awareness of VFK in the Belgian market by producing a Florida Keys themed podcast using Belgium born Yves Vrielynck as a testimonial. The podcast was planned to be recorded in November 2025 and will be additionally promoted with VFK newsletter and social media posts. Unfortunately there were some communication issues, so we are currently waiting for a new recording date.

5. CRD Select Luxury Promotion [Developing]

GIA confirmed participation in a joint marketing campaign with the luxury tour operator CRD Select and the CVBs of Naples and Palm Beaches, which is scheduled for execution in January 2026. The promotion will highlight an upscale fly drive itinerary which was created for a previous campaign and which will now be promoted through a full page advertorial in the Business Traveller magazine as well as an interactive online ad (“Content Card”) on the website of newspaper ZEIT. GIA has forwarded input and will receive creatives in December.

6. Geoplan Reisen [Developing]

GIA has expressed strong interest in a joint Florida campaign together with specialist long haul tour operator Geoplan Reisen in Q1-2/2026. Geoplan is currently trying to recruit a sufficient amount of partners to make the online promotion work.

7. Exciting West Advertorial Promotion [Developing]

During IPW, GIA has been approached with an interesting and reasonable priced opportunity for an advertorial placement in the next edition of a client magazine produced and published by luxury tour operator Exciting West from Belgium. GIA had confirmed a double page spread in the next fall edition of the magazine but is waiting for input from Exciting West. This might not be cancelled.

8. Journaway Online Promotion [Developing]

GIA is currently in discussion with multiple other Florida destinations and online tour operator Journaway about a potential joint online promotion during late summer. The online promotion would include the creation of a new fly drive itinerary highlighting all participating destinations and a targeted online promotion of that itinerary. Final details (and our commitment) are still under discussion as we are waiting for feedback from other destination partners.

9. Travel Trend Online Promotion [Developing]

GIA is also currently in discussion with Dutch tour operator Travel Trend about the creation of either a stand-alone Florida Keys marketing proposal or a joint Florida promotion. We have informed product manager Peter van Veenendaal about our intent but are still waiting for a specific proposal.

10. CANUSA Influencer Gaming Promotion [CANCELLED]

CANUSA, one of our top 3 tour operator partners, has approached us with a very innovative marketing idea surrounding the launch of the next part of the highly popular video game serie "GTA", which is scheduled to take place in May 2026. The story of the open world game GTA VI will be taking place in the fictional city of Vice City, a swamp region called Grassrivers and a tropical island chain called Leonida Keys – which are based on Miami, Everglades NP and the Florida Keys. CANUSA's idea is to create a special "GTA VI" themed fly drive itinerary to those three real world areas and promote this using a Twitch gaming streamer (Papaplatte) who has a reach of more than 1.3 million followers. The streamer would be traveling to the Keys in the time leading up to the launch of the game and would be livestreaming his trip to his large following while promoting destination awareness but also the bookable CANUSA itinerary. Update November: After we confirmed our commitment at the beginning of November following a meeting at BrandUSA Travelweek, CANUSA informed us that the influencers had decided that they would prefer to have their base in Miami. Under these circumstances we informed CANUSA that we would rescind our commitment as this (Florida Keys as a daytrip destination) is contrary to what we aim to promote and communicate.

III. VFK Internal

1. Ongoing discussions with VFK staff about planned marketing activities
2. Discussed initial logistics and planning for Vakantiebeurs with Yves
3. Coordinated followup from BrandUSA Travelweek with Yves
4. Discussed input for PR activities in November 2026 with PR team

IV. Travel Trade Assistance

1. HeyUSA, Antwerp(Belgium)
Tried to coordinate appointment for podcast recording between Yves and Sebastiaan; now postponed
2. CANUSA, Hamburg
Further communication around planned influencer promotion regarding launch of computer game GTA VI; ultimately declined, asked CANUSA for different marketing proposals
3. CRD Select, Hamburg
Confirmed participation and sent input for planned luxury promotion together CRD Select, Naples and Palm Beaches
4. USA Reisen Experte, Bergheim
Launched Cashback promotion and approved final assets; also ultimately postponed B2B event planned in Cologne
5. Geoplan Reisen, Berlin
Continued discussions about a potential Florida marketing campaign together with tour operator Geoplan in next fiscal year; waiting for more details
6. Argus Reisen, Bovenden
Discussed initial details about potential standalone FKKW marketing campaign
7. TUI, Hannover
Discussed details for potential marketing campaign including roadshow participation
8. TUI Reisecenter, Oldenburg
Informed winner of FVW Destination Day about the chance to take a trip to FKKW
9. DERPART Reisebüro, Bexbach
Sent shipment of VFK holiday guides for distribution at client event
10. Reiseoase, Schönebeck
Sent information on FKKW for private trip of travel agent to the Keys

V. OVERVIEW of fulfillment requests

2025	DISTRIBUTION VIA INFOX, GIA & EVENTS	
Month	Consumer	Travel Industry
January	113	4
February	224	5
March	158	7
April	26	4
May	123	5
June	724	3
July	515	7
August	34	4
September	217	5
October	174	6
November	259	5
December		
TOTAL	2,467	55

VI. German Market Update

Summer Season Brings record results for Travel Sales

German travel sales achieved record results for the summer season, which ran from April – October, 2025. According to data service provider Travel Data + Analytics (TDA), sales by travel agencies, online portals, and tour operator websites rose by 6%, while the number of bookings increased by only 1%. The new travel year is also off to a promising start.

According to TDA, German citizens spent around €16 billion on package or modular summer vacations this summer. This means that travel sales once again achieved record revenues. October contributed to this with good last-minute business.

According to TDA, a key driver of growth in September remained the short-term demand for fall vacations. With a 38%, last-minute trips accounted for the largest portion of September sales. The month of October was particularly popular, accounting for a quarter of all bookings. This is hardly surprising, as autumn holidays fell during this period in almost all federal states except Bavaria, according to market researchers. Compared to the same month last year, sales of last-minute autumn trips increased by 8%. The number of holidaymakers booked is less record-breaking: it is only 1% higher than the previous year's summer season. Compared to the summer of 2019, which was not yet affected by the pandemic or economic crisis, however, there is still an 8% shortfall. Growth this year will therefore continue to be driven primarily by higher travel prices.

The trend toward online bookings continues, as TDA data shows. At 47%, almost one in two people booked their summer vacation online on traditional travel portals or tour operator websites. In terms of sales, online sales now account for 43% of summer sales, representing growth of 15% percent. Brick-and-mortar travel agencies are maintaining their previous year's level.

The new winter season is starting with an 8% increase in sales. The number of vacations booked is 6% higher than last year. According to TDA market researchers, this is an indication that prices are only rising moderately and points to strong demand among early bookers. Long-haul trips, mid-haul trips to Western Mediterranean destinations, and cruises each account for about a quarter of winter sales to date. Egypt is particularly noteworthy, with a 20% in sales compared to the previous winter.

Early bookers drive summer 2026

Meanwhile, the early booking market grew even more strongly than the market for last-minute bookings. More and more travelers are already securing their summer vacations for next year. Compared to the previous year, sales from these bookings rose by 24%. Taken together, early bookers for summer 2026 and later travel periods already accounted for 31% of September sales – the same as the upcoming winter season. And a whopping 46% of sales in October were already for the next summer season.

(ReiseVor9, Oct 30 and Nov 27th, 2025)

Early Booking Trend and Long-Haul Travel Boost Dertour Sales

The Dertour Group has reported positive results for the 2024/25 tourism year. The number of guests rose by 8%, while sales increased by 12%. Boris Raoul, CEO Germany and Austria, cites “affordable luxury” as a trend. Despite high travel prices, the proportion of five-star bookings rose by 53%.

After an increase in guests of almost 40% in the previous season, the current winter season at Dertour (Oct – March) is maintaining the high level, says Germany boss Boris Raoul. Demand is up 1% In addition, Spain, Egypt, Turkey, Germany, and Tunisia are among the most popular destinations for the 2025/26 winter season across all of the tour operator's brands. According to Raoul, the rising stars are Egypt and Austria, each with 22% growth, and Finland with 19% growth. The losers are North America, or more precisely, the USA. Dertour is recording double-

digit percentage declines there. “That does affect us, but we're hoping for a comeback. Canada is doing very well, the USA has to come back,” says Sven Schikarsky, Chief Product Officer at Dertour.

Early start to bookings for summer 2026

According to Raoul, the coming summer season is “already better booked than in previous years.” The early start, combined with moderate price increases, has led to an 18% increase in guests. Demand is growing in all segments, according to the Dertour manager. Long-haul travel is developing particularly dynamically, with growth of 33%. One in five bookings for summer 2026 is for a long-haul trip.

“Tunisia is the absolute high-flyer”

Tunisia is back on the tourist map with an increase of 81% compared to last year, explains Raoul. In the long-haul segment, East Africa leads the list of rising stars with 89%, followed by the Caribbean with 53% and the Indian Ocean and the Emirates (46% each). Thailand and the smaller Greek islands also continue to be in high demand. The most important destinations overall remain Turkey, Spain, Greece, Egypt, and Germany for Dertour. Turkey is recording growth, while Spain is stagnating at a high level. The Canary Islands, for example, are currently too expensive and, according to Dertour data, are losing travelers on a large scale to destinations with a better price-performance ratio, including Egypt, says Raoul.

Price-conscious demand and early booking trend

The average advance booking period increased by eight days to 135 days before departure last year. This trend is continuing. Early bird discounts of up to 50% and flexible rates are decisive factors, says Raoul. The combination offers “double security” for customers: low prices and free rebooking or cancellation up to 15 days before departure.

According to Dertour, demand for all-inclusive products is particularly striking, with over 60% of all customers booking this type of service. Looking at the booking situation, May 2026 stands out in particular, according to Germany CEO Raoul. Public holidays and long weekends are being heavily utilized, leading to a 37% increase in guests this month.

Travel behavior in 2026 shows three trends

According to the product manager's presentation, the Dertour Group's internal data analysis shows three major developments: experimental travel, slow travel, and sustainable travel. Dertour defines experiences as short trips to events or special places, from safaris and sporting events to film locations. According to Schikarsky, slow travel is also gaining in importance, with growing demand for rail travel, hiking, and bike tours.

Sustainability remains an important and sought-after component for the tour operator, according to the product manager. The proportion of certified hotels is rising by 10%. A quarter of all hotels now meet sustainability criteria, and the trend is rising. With this focus, Dertour wants to concentrate equally on breadth and depth in its product range. Dertour's goal is “to provide the right offer for every situation and every budget,” says Raoul. He contradicts the impression that the group is focusing solely on volume. “We also deliberately serve the niche market,” he says.

(ReiseVor9, Nov 27, 2025)

Consumer Sentiment Remains Poor. The Christmas season is Unlikely to Bring Any Relief.

In Germany, the signs point to consumer restraint ahead of the Christmas season. According to the monthly survey conducted by GfK market researchers and the Nuremberg Institute for Market Decisions (NIM), consumers are entering November, which marks the start of the high-turnover Christmas shopping season in the retail sector, in a gloomy mood.

The consumer climate barometer calculated for the coming month fell by 1.6 points to minus 24.1 points, as the researchers announced on Tuesday. "The consumer climate continues its downward trend," said NIM expert Rolf Bürkl, commenting on the October survey of around 2,000 German citizens. Economists surveyed by the Reuters news agency had expected consumer sentiment to improve slightly.

The propensity to buy, i.e., the fundamental willingness to purchase expensive goods such as consumer electronics or furniture, only slightly mitigated the significant decline in the current consumer climate: The barometer rose by 2.3 points to minus 9.3 points.

Bundesbank assumes state of stagnation

"Despite the slight increase, however, the propensity to buy remains at rock bottom," said Bürkl. In his view, persistently high food and energy prices are likely to contribute significantly to consumer reluctance to buy.

The downward trend in consumer economic expectations from the previous month did not continue in October. After three consecutive declines, the economic indicator gained 2.2 points to rise to 0.8 points.

According to the NIM experts, this means that economic sentiment is currently almost at the same level as last year: "This signals that no significant economic recovery is to be expected in Germany in the coming months," Bürkl concluded. The majority of economic experts expect the economy to pick up speed only in 2026.

(Handelsblatt / Reuters, Oct 28, 2025)

German Retailers Expect Modest Rise in Christmas Sales but Mood Cautious

Germany's retail sector expects modest annual growth this holiday season, with sales forecast at 126.2 billion euros (\$147.2 billion) for November and December according to the German Retail Association (HDE). But the mood looks far from festive. Retailers remain cautious as the economy struggles after two years of stagnation and shoppers are expected to spend less per person than last year. In its Christmas-period forecasts, HDE said it expected sales for this month and December would be up 2.3% on-year in price-adjusted terms, or 1.5% in nominal terms.

"Despite a difficult environment and many uncertainties, the holiday business remains stable," said HDE president Alexander von Preen. "However, many retailers view the industry's most important sales period by far with caution or pessimism," he added. Retailers generate about 18.5% of their annual sales in the last two months of the year, which usually determine how the entire financial year is assessed.

Retailers and consumers remain cautious

An HDE survey of 300 retail companies showed that 80% of companies expect consumers to be restrained in their spending, and 83% expect customers to pay closer attention to prices. Half of non-food retailers expect a worse or significantly worse Christmas season than last year, in what HDE considers a clear warning sign.

While gift vouchers, toys, and cosmetics remain popular choices, the underlying message is clear: Both businesses and consumers are tightening their belts, hoping stability will eventually return to Europe's largest economy.

A separate HDE survey of 2,000 people showed that each person is expected to spend an average of € 263 euros, or € 34 euros less than the previous year, which is another sign of consumers' cautiousness. *(Reuters, Nov 5, 2025)*

President Trump Scares Off US Travelers

The policies and public appearances of US President Donald Trump are deterring German tourists from visiting the US. America Unlimited and Dertour are reporting significant declines in travel to the US. This year, customers are preferring other countries, says Timo Kohlenberg, head of America Unlimited.

“We can see very clearly that Donald Trump's presidency is unsettling many traditional fans of the US,” says Kohlenberg. “It's not just about political decisions, but above all about the perception his persona creates internationally. This mood is having a noticeable impact on people's desire to travel, and we can see that in our figures.”

Dertour also outlined a similar development this week. The US is a loser with a double-digit decline.

“That affects us, and we hope for a comeback,” says managing director Sven Schikarsky. However, Dertour blames not only the political situation but also price increases for the decline.

Many customers are now booking Canada instead of the US

While the US is weakening, America Unlimited, like Dertour, is seeing a shift in bookings from the US to Canada. Kohlenberg reports a 65% increase in sales for trips to Canada. “Many guests who had originally planned a trip to the US now prefer our northern neighbor,” says the America Unlimited boss.

For Kohlenberg, the continuous expansion of the program of sister brand Australia Unlimited is also paying off. Demand for Australia and New Zealand has doubled within a year. Here, too, the Trump effect is playing a role. “Australia and New Zealand are a natural alternative for many of our customers when the US is less appealing,” says Kohlenberg.

Despite the negative overall trend, demand within the US is developing differently at America Unlimited.

According to Kohlenberg, California is in positive territory whereas Florida has experienced a decline.

(ReiseVor9, Nov 28, 2025)