

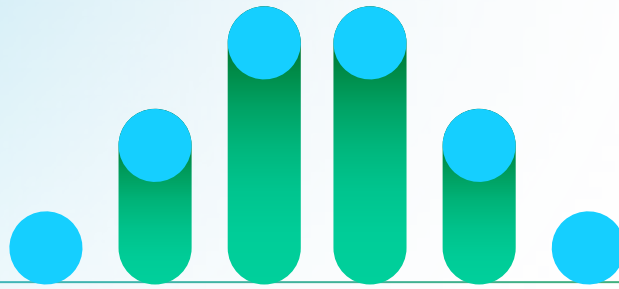
MUNICH

TRAVEL TRENDS REPORT

Travel Duration: October to December 2025



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Foreword

As 2025 draws to a close, Munich is set to welcome a wave of international travelers — led by the U.S., Spain, and the U.K.

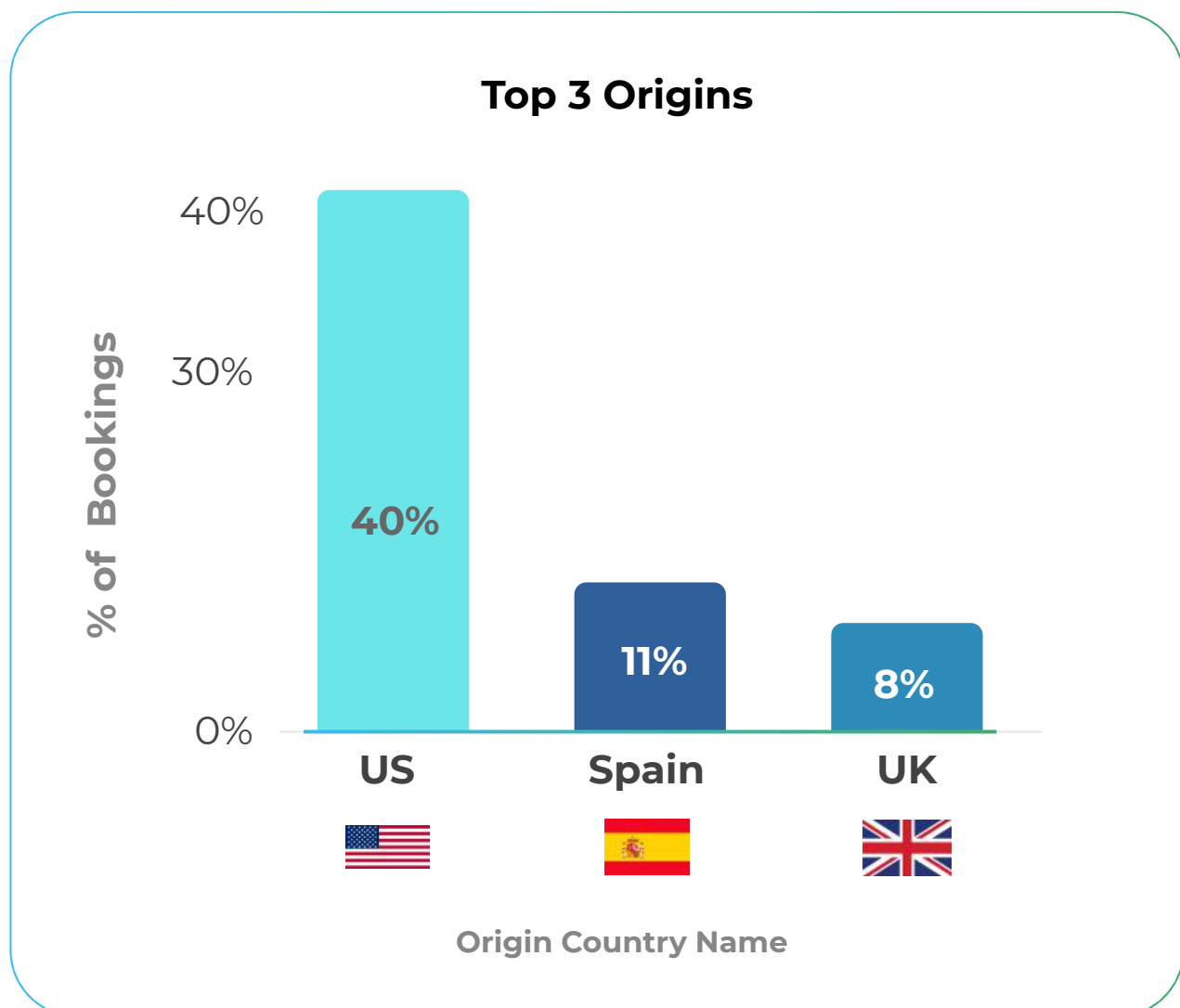
This report dives into their travel behavior, including trip purpose, travel duration, advance booking windows, group sizes, and pricing trends - offering a clear view of how to plan ahead and capture demand as the year winds down.

Munich's market presents opportunities for both budget and premium pricing, requiring operators to balance volume and revenue margins to meet diverse customer needs.



Top Origins: U.S., Spain & U.K. Lead the Way

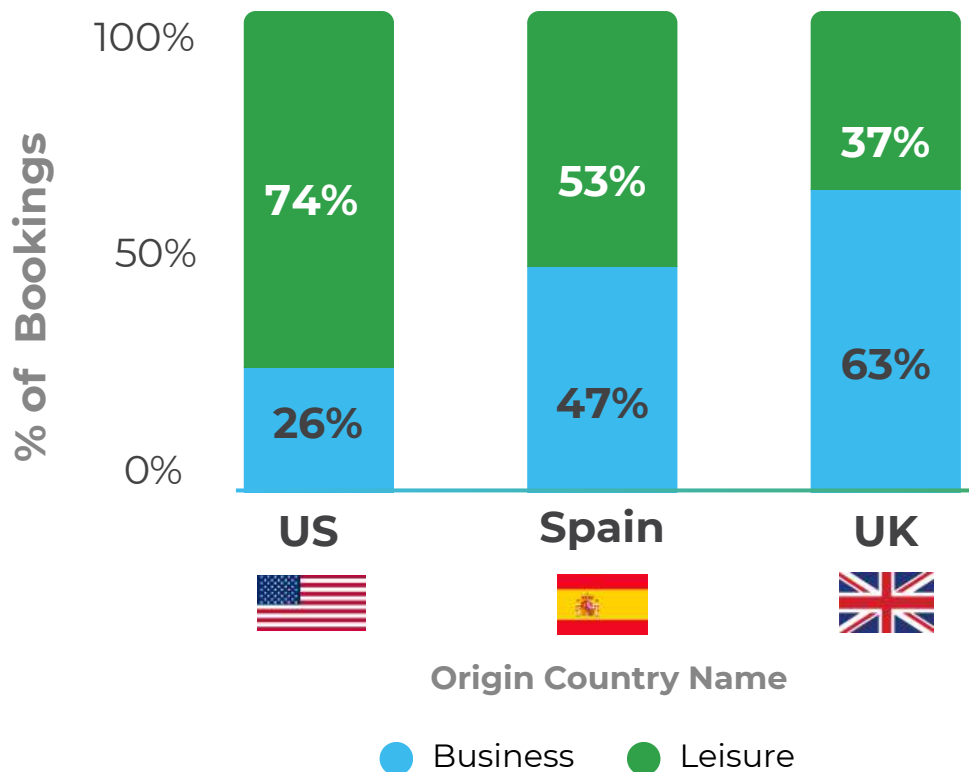
Inbound arrivals will be anchored by the U.S. (71%), with Spain (11%) and the U.K. (8%) following. This means car rental operators can lean into premium, reliable services for U.S. visitors while creating attractive mid-range offers for nearby European travelers.



Leisure Travel Takes the Spotlight

Leisure is the primary reason for travel to Munich, with 74% of U.S. visitors and 53% of Spanish visitors traveling for holidays. In contrast, 63% of U.K. travelers will visit for business, creating a demand for corporate-friendly rentals. Packages aimed at leisure travelers will likely attract the other groups.

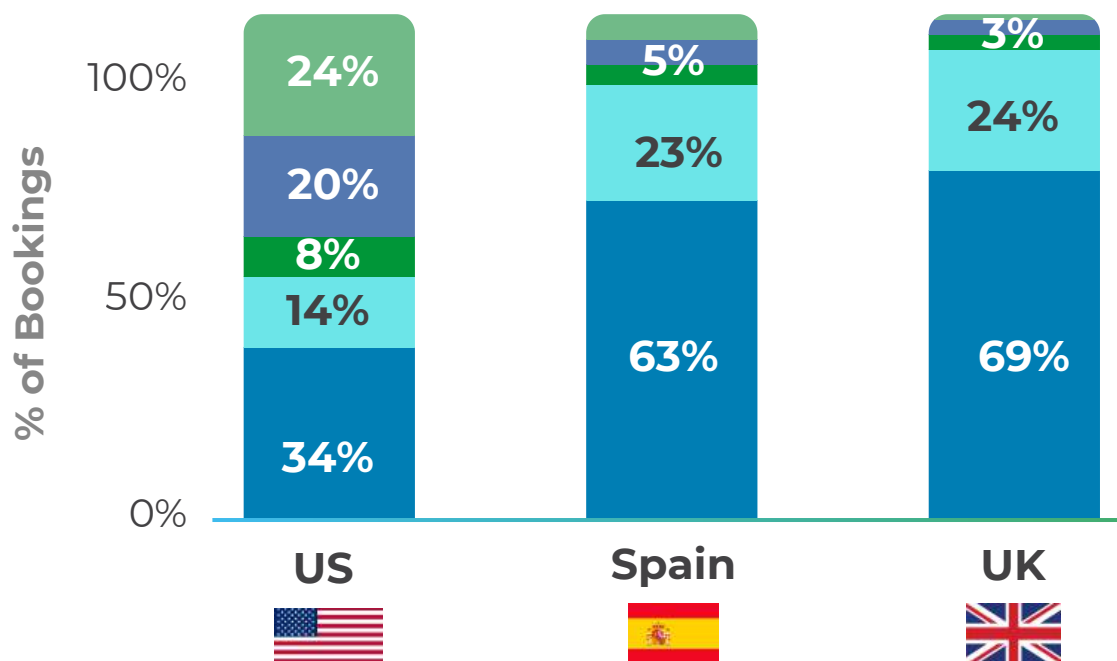
Reason for Travel by Top Origins



Trips Cluster at 3–6 Days, with Many 7+ Day Stays

Nearly half of all trips will last 3–6 days, typically long enough for city breaks or regional getaways. About a third will stretch beyond a week — often family holidays or extended leisure stays. Very short trips will be rare, suggesting that multi-day rentals will be the baseline expectation for most travelers.

Trip Duration Category by Top Origins

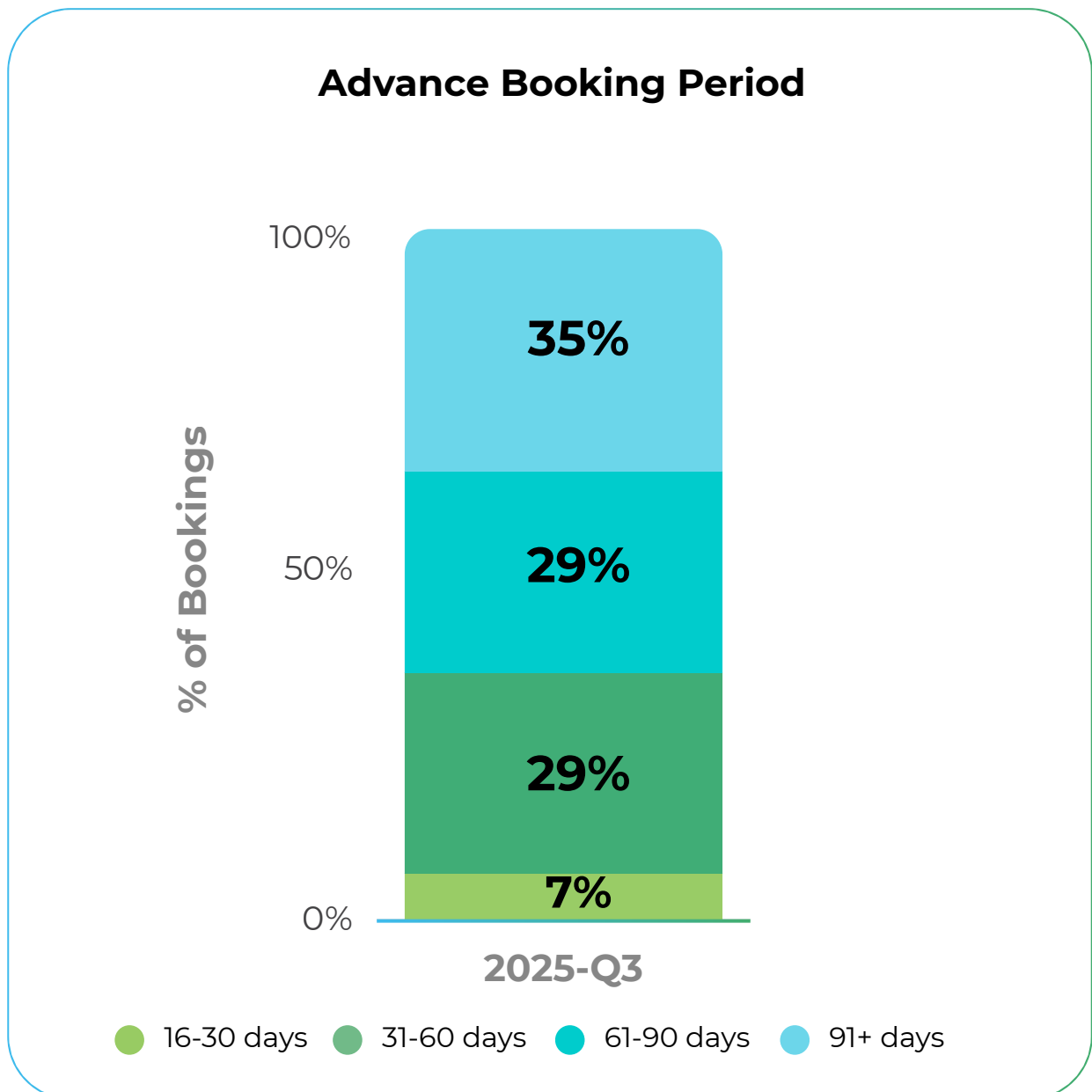


Origin Country Name

● 1 to 2 days ● 3 to 4 days ● 5 to 6 days ● 7 to 10 days ● > 10 days

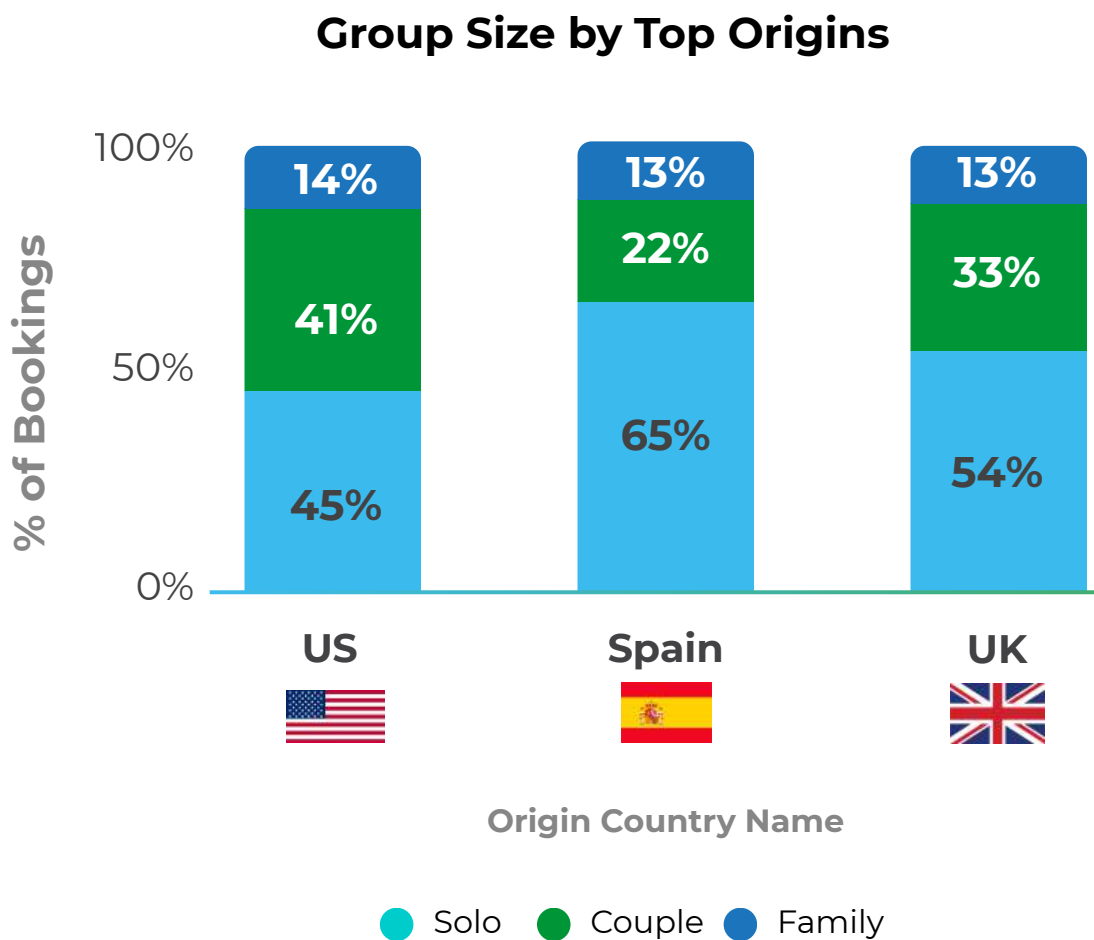
Most Travelers Book 1-3 Months Ahead

About 92% of visitors will book their trips 31-90 days in advance. This gives car rentals a strong opportunity to lock in demand early with targeted campaigns, loyalty rewards, and advance-booking discounts.



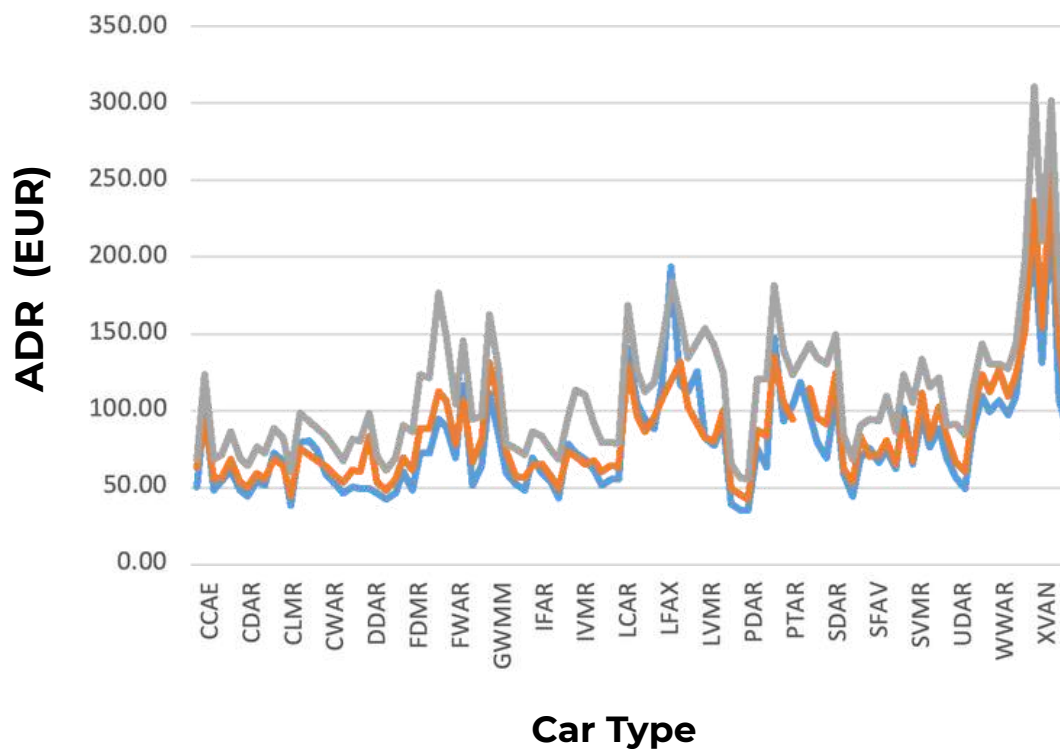
Mostly Solo or Duo Travelers, Fewer Families

Solo travelers and couples will make up the bulk of arrivals, while family groups will represent a smaller share. This will call for a fleet weighted toward compact cars and crossovers, with some SUVs and vans available for families and longer holidays.



Premium Categories Will Drive Year-End Price Surge

Prices are set to climb through the season, with Special SUVs projected to peak at EUR 310.39 while Mini cars remain as low as EUR 34.91. Expect prices to trend upward toward December as holiday travel builds, especially for premium vehicles. Capturing early demand with competitive rates — while keeping flexibility for last-minute price lifts — will be key to protecting margins as demand peaks.



*Each line represents the ADR for a car category on a specific pickup date

Key Takeaways for Car Rentals

- 01 Secure Long-Lead Demand (31–90 days)**

Keep premium inventory visible early and use advance promotions to capture bookings 1-3 months ahead before travel.
- 02 Align Fleets with Trip Patterns**

Stock compact cars and crossovers for 3–6 day city breaks, while offering discounted weekly rates for 7+ day leisure stays.
- 03 Prioritize Solo and Couple Travelers**

Streamline booking and pick-up processes, ensuring compact vehicles are readily available for quick turnaround.
- 04 Tailor Offers by Origin Market**

Position U.S.-focused promotions around reliability and premium service, while targeting Spain and the U.K. with mid-range weekend and getaway packages.

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