

A person wearing a hat and a patterned shirt is standing on a blue paddleboard on a calm lake. The water is still, reflecting the person and the surrounding landscape. In the background, there are large, hazy mountains under a clear sky. The overall scene is peaceful and scenic, suggesting a focus on outdoor recreation and nature.

# FINDING BALANCE

Wellbeing-driven, sport-enabled travel

DERTOUR GROUP  
EUROPEAN TRAVEL  
TREND REPORT

**DERTOUR**  
GROUP

# How wellbeing and sport shape travel choices across Europe

**What motivates people to travel?** This question framed the first part of the DERTOUR Group Travel Trend Report, highlighting how nature, balance, and the desire to slow down increasingly influence holiday choices across Europe. Rather than focusing solely on destinations, travellers increasingly describe holidays in terms of how they want to feel while travelling: calmer, healthier, more restored. This trend also defines a different role for movement, not as a performance goal, but as part of staying active and supporting recovery.

When asked about travel motivations, a clear and consistent pattern emerges across all 13 European markets, placing wellbeing at the top.

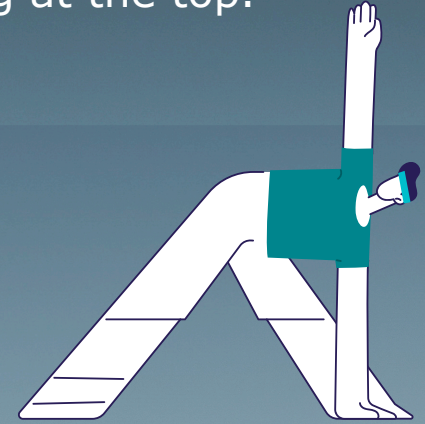
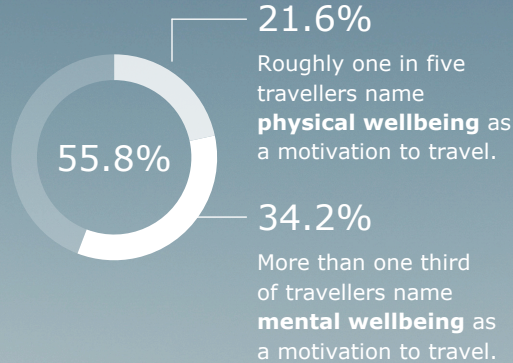
## No. 1: Wellbeing

**Wellbeing-led motives** rank highest, with **relaxing and recharging** as the strongest travel motivation.



## More than half

prefer wellbeing trips, with mental and physical wellbeing going hand in hand



## Sport complements wellbeing-led travel

**Sport to support the need for balance and rest:** it is less a primary travel reason and more a way to **reconnect with your body, reduce stress, and be active** during holidays.



**Christoph Debus**  
CEO DERTOUR Group

“Looking at travel patterns today, a clear trend can be observed in how travellers define a good holiday. Wellbeing and sport are increasingly understood as parts of the same search for balance: the desire to balance light activity with slowing down and feeling restored. Our findings, supported by insights from our specialist business, show that while this trend is widely shared, it takes on distinct shapes across Europe.”

## A pan-European lens on how travel is changing

Building on the first part of the Travel Trend Report, this second chapter looks at how respondents' expectations translate into concrete travel choices. The survey focuses on how people link wellbeing, rest, and activity when making holiday decisions, and how these elements come together.

Rather than treating rest and movement as opposites, the results point to a more integrated understanding of holidays. Travellers increasingly expect time away to feel restorative while still allowing for activity. Wellbeing provides the frame, but it is often supported through movement rather than passive downtime alone. In this context, activity is not necessarily about performance or intensity, but about supporting recovery. This perspective sets the foundation for the insights that follow, where rest does not exclude movement, and wellbeing can be actively shaped.

# Wellbeing sets the frame for travel choices

Survey results show that wellbeing-related motives are among the most frequently cited reasons for travel across Europe, with more than half of travellers saying they would rather or much more likely choose this type of trip. Sports- and physical activity-focused holidays follow, with 35% expressing openness, confirming that sport is a selective but relevant proposition.

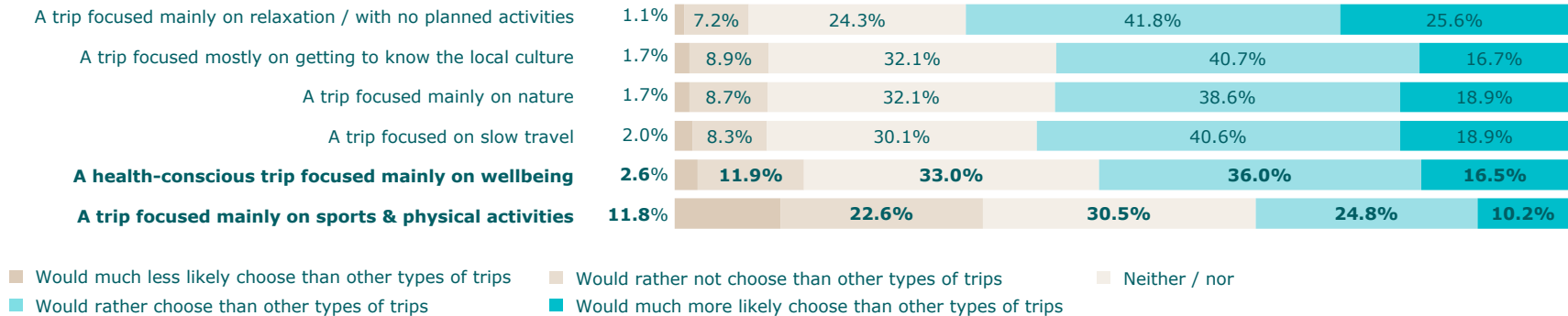
At country level, this pattern takes distinct shapes. In markets such as Germany (61.1%), France (58.3%),

the Czech Republic (53.7%) and Slovakia (58.7%), openness to wellbeing-focused travel clearly outweighs interest in sports- and activity-led trips, which typically remains below 40%.

Across demographics, the picture is equally clear: 52.6% of travellers overall would rather or much rather choose a health-conscious trip focused on wellbeing, rising to 55.1% among women, compared with 50.1% among men.

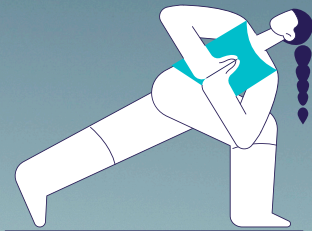
**Romania combines both worlds:**  
66% prefer wellbeing-focused trips, while 41% are also open to sports- and activity-led holidays, the strongest dual preference across Europe.

**Fig. 1: To what extent would you consider planning the following type of trips/getaways?**



# Key insights: Age shapes holiday priorities

## WELLBEING – STABLE APPEAL



Wellbeing-focused travel shows **broad and deep relevance** across age groups.

From early adulthood through to later life, interest in holidays that feel restorative remains consistently strong, highlighting wellbeing as a stable reference point rather than an age-specific preference.

## SPORT – LIFE-STAGE DIFFERENCES

**43%** INTEREST AMONG  
25- TO 43-YEAR-OLDS

Interest in sports and physical activities is **strongest among younger travellers**, peaking at 43% among those aged 18–24.

Interest remains relatively high among travellers aged 25–34 before gradually declining with age.

This finding challenges the idea that sport is only relevant to younger age groups and highlights its role as a supportive, wellbeing-oriented part of travel later in life.

**23%** INTEREST AMONG  
55- TO 65-YEAR-OLDS

Still, almost one in five travellers aged 55–65 (23%) remain interested in sports and physical activities.



## When wellbeing becomes the destination

Rather than short breaks or incidental spa visits, travellers increasingly seek environments that place recovery, mindfulness, and physical health at the centre of the holiday experience. In the UK survey results, around half of travellers say they would rather or much more likely choose a health-conscious trip focused on wellbeing, with a comparable share drawn to holidays centred on relaxation with no planned activities. Beyond passive downtime, the results also point to

restorative formats: more than one in three are open to trips focused on sports and physical activities, suggesting that rest can include movement and recovery.

This trend is reflected in how wellbeing travel is addressed across DERTOUR UK's portfolio. Kuoni UK approaches wellbeing from a complementary, premium perspective, curating long-haul journeys where holistic practices and centuries-old traditions frame the experience, including retreats such as Santani Wellness Resort & Spa near Kandy, Sri Lanka, combining daily yoga and meditation with personalised nutrition concepts and holistic treatments in secluded, retreat-style settings.

A similar focus on immersive, programme-based wellbeing can be seen at Kuoni Sports, a brand of DERTOUR Suisse, where wellbeing travel increasingly takes the form of activity-led retreats rather than classic spa breaks. Formats such as a Yoga & Pilates Week in Morocco, hosted at the eco-resort Paradis Plage in Taghazout, combine Pilates and yoga sessions with time spent in natural surroundings, creating a clear rhythm of physical strengthening and mental relaxation.



**Ben Boesch**  
Joint CEO DERTOUR UK

“Holidays are integral to good health, a trend that is becoming more pronounced as people blend different interests into their holiday planning. Rest can be active, which is why walking, hiking, yoga, Pilates, skiing, cycling, swimming, and meditation increasingly sit at the centre of holiday design for a growing number of people. As a group of specialist businesses, we are able to embrace this trend by curating experiences ranging from self-guided walking holidays in the Dolomites with Inntravel to Maldivian island retreats with a strong self-care focus through Kuoni. At the same time, increased investment and innovation at hotel and destination level are expanding opportunities to further diversify and develop our specialist range.”

# Key insights: Demand drivers by profile

## DEMOGRAPHIC PROFILES

**Physical wellbeing** as a travel motivation peaks among **45-54-year-olds**, with lower relevance in younger and older age groups



**Mental wellbeing** as a travel motivation peaks among **25-34-year-olds**, but remains relevant across middle-aged and older travellers



**High-income travellers** show above-average interest in both wellbeing- and sports-focused trips

## MARKET TRENDS & FORMATS

### Hybrid formats fuel market growth

Growth is driven by hybrid formats combining activity, recovery, and nature, accommodating different expectations without splitting the offer

### BROAD GENDER APPEAL

Wellbeing travel shows broad, gender-balanced appeal



**ACTIVITY • RECOVERY • NATURE**

### SINGLES

Singles lean towards event-based and activity-driven experiences

vs

### MARRIED TRAVELLERS

Married travellers / civil partnerships favour slower, more restorative formats

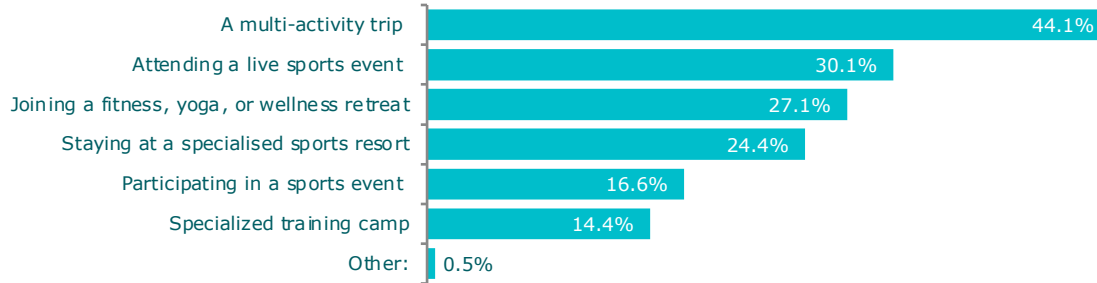
# When balance beats performance: Sport, redefined

Among travellers open to sports-focused holidays, multi-activity trips lead by a wide margin (44.1%), reflecting a strong desire to combine different types of movement within one holiday, while performance-driven formats appeal to markedly smaller audiences. Attending live sports events follows at 30.1%, highlighting the appeal of sport as a shared experience.

More structured formats attract smaller, clearly defined audiences. Fitness, yoga, and wellness retreats appeal to 27.1%, positioning these offers at the intersection of activity and recovery. Specialised sports resorts with guided training are preferred by 24.4%, while participation in organised sports events such as marathons or triathlons appeals to a narrower group (16.6%). Training camps remain niche (14.4%), confirming that performance-focused travel is far less widespread than wellbeing-compatible formats.

**Fig. 2: What type of sports-focused getaway appeals to you most?**

Multiple answers possible



## Different paths to active travel:

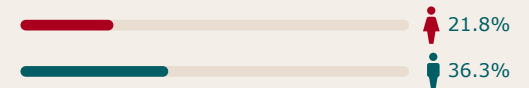
Multi-activity trips appeal strongly to both genders, with a slightly higher preference among women (45.7% vs. 42.9%).



Beyond this shared interest, women are more drawn to fitness, yoga, and wellness retreats (35.9% vs. 20.6%)



Men show a stronger preference for live sports events (36.3% vs. 21.8%) and training-led formats.



## INSIGHTS FROM OUR SPECIALIST BRANDS

### The rise of multi-activity travel

Multi-activity travel is evolving from single-sport holidays into journeys built around variety. Physical activity no longer stands on its own but shapes the route, pace, and overall experience. This shift is particularly visible in the Czech Republic, where 48% of travellers open to sports-focused getaways prefer multi-activity formats that combine movement with nature, scenery, and shared leisure time. Rather than choosing one defining activity, travellers increasingly expect experiences to connect into a coherent whole.

Specialist brands respond by designing itineraries where accommodation and daily activities are planned as one connected journey. NEV-DAMA illustrates this approach with activities such as multi-day **bike safaris** crossing Alpine regions and borders, as well as **trek safaris** that link daily hiking stages into mountain routes. These trips are complemented by experiences such as **paragliding**, **summer toboggan runs** or other mountain activities, allowing travellers to combine endurance, adventure, and lighter moments within a single trip. Reflecting sustained demand for this type of travel, NEV-DAMA welcomed 17% more guests in the 2025 fiscal year than in 2024, pointing to the growing relevance of multi-activity formats within specialist portfolios.

The logo for NEV-DAMA, featuring the brand name in a bold, blue, sans-serif font centered within a white rounded rectangular box with an orange horizontal bar above it.

INSIGHTS FROM OUR HOTEL DIVISION

HOME OF WELLBEING & SPORT



play  
itas



## Movement as a mindset to recharge

Rather than positioning wellbeing as a retreat from everyday life, a growing expectation is emerging among European travellers: the desire to be active while travelling. As sport- and health-led travel continues to move into the mainstream, appeal increasingly lies not in performance or intensity, but in environments that make movement, recovery, and mental balance easy, flexible and self-directed.

### Where sports, wellbeing, and nature come together

As DERTOUR Group's specialist sports and active lifestyle brand, Playitas is positioned not as a classic resort with added activities, but as a purpose-built environment where movement, recovery and mental wellbeing are seamlessly integrated into the holiday experience. Located in Las Playitas on Fuerteventura, the resort operates

as a purpose-built sports and active lifestyle environment, where sport is not an add-on, but an integrated part of daily holiday life. Professional infrastructure, including an Olympic-size outdoor pool, extensive indoor and outdoor sports facilities, a large gym and a dedicated cycling centre, enables structured activity for those who seek it, while remaining approachable for recreational travellers.

Daily programmes combine sport, fitness, mobility, yoga and relaxation, allowing guests to shape their stay according to their own rhythm. This flexibility aligns directly with traveller preferences identified in the report: multi-activity formats are the most appealing sports-focused getaway overall (44.1%), while retreat-style formats appeal especially to travellers who seek to combine movement with recovery rather than performance.



## A lifestyle concept beyond sport

The concept extends beyond sport. Food is functional and balanced, designed to support both activity and recovery. Different accommodation types allow solo travellers, couples, families, and training groups to coexist, with each able to follow their own pace and rhythm within the same shared environment.

The Nordic perspective reinforces this understanding of movement as part of rest. Survey findings show that travellers in Northern Europe tend to associate wellbeing less with traditional spa infrastructure and more with nature, fresh air, physical activity, and mental balance.

This mindset is clearly reflected at Playitas Resort, where around 55% of guests currently come from Nordic markets. The resort's outdoor setting, everyday accessibility of activity and emphasis on functional movement rather than indulgence resonate strongly with expectations of rest that is restorative without being passive.



**Daniel Giray**

Head of Apollo Sports  
at DERTOUR Nordic AB

Travellers in the Nordics increasingly want holidays that feel familiar in the best sense. Physical activity, time outdoors, relaxation, and mental balance remain important while travelling. Playitas is tailored to these expectations, offering an environment where movement is easy to integrate, routines can be maintained, and intensity remains optional. This makes it a natural choice for travellers who want to stay active without committing to rigid programmes, regardless of where they come from.

## INSIGHTS FROM OUR SPECIALIST BRANDS

### Live sport as a travel trigger

Attending live sports events represents a distinctive strand of sports-focused travel, appealing to 30.1% of travellers who are open to sports-led holidays overall. Interest, however, varies significantly by market. Denmark and the UK stand out in particular, showing the strongest appetite for travelling to attend live sports events, ahead of all other markets surveyed.

For travellers who want sport to define their journey, DERTOUR Sports provides the missing link. As a specialist brand for sports and event travel within the DERTOUR Group, DERTOUR Sports responds directly to this demand by turning major sporting highlights into fully organised travel experiences. On the spectator side, DERTOUR Sports transforms globally recognised sporting highlights into fully organised travel experiences, including international football matches, Formula 1 races, NBA games and the iconic PDC Darts World Championship in London.

The portfolio also addresses travellers with personal sporting ambitions. Covering the complete Abbott World Marathon Majors series alongside selected international marathons and half-marathons, DERTOUR Sports combines guaranteed race entries with accommodation, transfers, and on-site support.



**DERTOUR**  
SPORTS



#### Top countries for live sports travel

1. <b>Denmark</b>	46%
2. <b>UK</b>	41%
3. <b>Sweden</b>	37%
4. <b>Finland</b>	36%
5. <b>Czech Republic</b>	32%



# The anatomy of a health-conscious holiday

Survey findings show that health-conscious holidays are increasingly defined less by passive wellness facilities and more by environments that support regular movement, mental balance, and recovery. Access to mental health resources is valued almost as highly as a health-conscious culinary offer, signalling that psychological wellbeing is treated as an essential component of wellbeing-focused travel.

In Switzerland, guided, social activity formats shape how wellbeing travel is understood. Kuoni Sports reflects this approach through sport- and activity-led group journeys designed for different life stages and fitness levels. Demand mirrors this clearly: Kuoni Sports recorded guest growth of 52% year-to-date. Survey results reinforce this pattern, with 34% of Swiss travellers open to sports-focused holidays prioritising fitness, yoga,

and wellness retreats. Age further differentiates priorities in health-conscious travel. The importance of access to wellness and spa facilities rises steadily with age, from 33% among 18–24-year-olds to 43% among those aged 55–65. Geographic location follows a similar pattern, increasing from 32% among younger travellers to 43% in the oldest group.

**Fig. 3: When planning a health-conscious trip focused on wellbeing, which factors influence you the most?\***

Multiple answers possible



\* The survey covered additional factors not shown here

## Top 5 spa & wellness lovers

1.	Slovakia	47%
2.	Austria	47%
3.	Denmark	46%
4.	France	43%
5.	Czech Republic	42%

## INSIGHTS FROM OUR SPECIALIST BRANDS

### Active formats with built-in recovery

This approach is particularly visible in Switzerland, where wellbeing is often understood as guided, social activity formats rather than classic spa-only breaks. Kuoni Sports Travel reflects this with a broad portfolio of sport- and activity-led group journeys for different life stages and fitness levels. Survey data supports this: 34% of Swiss travellers open to sports-focused holidays prioritise fitness, yoga, and wellness retreats. Since the beginning of the year, Kuoni Sports has recorded a 52% increase in guest numbers versus the same period last year, underlining the strong demand for structured, activity-led wellbeing formats.

Formats such as **Sportplausch Giverola** focus on shared movement and community: a multi-sport week with daily training for adults and children plus evening social activities, creating a relaxed rhythm between effort and recovery. In a coastal setting with experienced athlete-coaches, the programme values togetherness and enjoyment as much as activity. More intensive formats meet different needs: the **UNIK Workout Week** in Gran Canaria targets sport-oriented travellers seeking structured training in a supportive environment, where HYROX, yoga and padel are complemented by mobility and regeneration sessions and expert input from a multidisciplinary coaching team within a clear recovery framework.

**KUONI**  
Sports



# SPOTLIGHT ON GOLF



## Golf as a path to balance

The Nordic markets reflect a different interpretation of the same need for balance. Rather than guided programmes or retreat formats, wellbeing is often supported through simple, outdoor activities embedded in the landscape. Golf-based journeys under brands such as Out Of Bounds and Golf Plaisir illustrate this approach, using the game as a way to connect movement and nature experiences. Sustained walking, time outdoors and focused play combine physical activity with mental clarity. In 2025, Golf Plaisir increased its turnover by 13% compared with 2024, reflecting continued demand for environment-led, self-directed wellbeing travel.



“Golf has a unique ability to slow things down while keeping you active. When it’s combined with the right destination, it becomes a form of wellness in itself.”

**Peter Browall**  
CEO Specialist Division  
DERTOUR Nordic AB

# OUT OF BOUNDS

GOLFRESOR

Nº 1  
INSIDER  
TIP

## SPOTLIGHT ON GOLF

### Golf at the edge of the world

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<b>Brand</b>	Out Of Bounds
<b>Destination</b>	Lofoten, Norway
<b>Golf highlight</b>	Lofoten Links, one of the world's most spectacular links courses

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This Out Of Bounds journey centres on Lofoten Links, a bucket-list golf course set between mountains, white beaches, and the Arctic Ocean. Played on a raw, natural links layout, each round is shaped by wind, light, and landscape.

During summer, golf under the midnight sun allows long, unhurried rounds, while accommodation at the Lofoten Links Lodges places guests directly by the fairways, with nature always close at hand. The result is a rare combination of world-class golf, sustained physical activity and mental reset, far removed from everyday routines.

**Local touch:** Curated by Out Of Bounds, the journey combines iconic golf with coastal scenery, local routes, and northern hospitality, turning each round into a distinctive experience.

# Golf Plaisir



N° 2  
INSIDER  
TIP

## SPOTLIGHT ON GOLF

### Championship golf meets the Eternal City

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<b>Brand</b>	Golf Plaisir
<b>Destination</b>	Rome, Italy
<b>Golf highlight</b>	Parco de' Medici Golf Club, 27 holes next to the city

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At Parco de' Medici, Golf Plaisir offers championship golf just minutes from central Rome. Guests play on a 27-hole parkland course with generous greens, water features, and strategic bunkering, all within walking distance of the hotel. Golf structures the mornings, while afternoons and evenings are free for Rome's culture, history, and gastronomy. The short distance between course and city makes it easy to combine sustained physical activity with urban exploration, creating a trip that feels both active and varied.

**Local touch:** Playing on the "green side of Rome" allows travellers to experience the city from two perspectives – calm and focused on the course, vibrant and dynamic in the historic streets.

# THE CALL FOR CALM



37% prioritise  
closeness to nature  
when planning  
health-focused trips

## Nature as a foundation for renewal and balance

Across both parts of the Travel Trend Report, one consistent trend emerges: nature functions as the foundation on which travel expectations are built. In the first part of the report, nature is framed as a space for slowing down; the wellbeing and sport findings deepen this perspective, showing how natural environments also highlight active and health-conscious travel. Health-focused travel increasingly starts with where rather than what. Natural surroundings (from air quality to landscape) shape expectations of wellbeing alongside classic wellness facilities, reinforcing the role of environment as a core part of active and restorative holidays.

“Across Europe, travel is increasingly shaped by the search for balance,” says Christoph Debus, CEO of DERTOUR Group. “There is a clear trend towards holidays that bring different needs together: the desire to slow down, to stay active, and to support mental balance without overloading the experience. Nature plays a central role here, not as a backdrop, but as the element that connects movement, recovery, and wellbeing. What matters most today is creating environments where this balance takes shape intuitively, without feeling overly planned.”



## About DERTOUR Group

DERTOUR Group, a member of the REWE Group, is a leading international tourism company and the second-largest tour operator in Europe. With more than a century of experience, DERTOUR Group is home to over 200 travel companies offering a wide variety of holiday experiences designed so people can relax, explore, or pursue their passions. An international team of 15,000 employees supports millions of guests annually throughout their entire journey, generating a turnover of 8.7 billion euros in 2024.

Today, DERTOUR Group is active in 16 European markets and encompasses more than 20 major

tour operator brands, around 30 specialist travel providers, and a network of approximately 2,000 travel agencies. As an integrated tourism company, DERTOUR Group combines a diversified tour operating business with a global portfolio of tours and activities and a strong hotel division. The thriving hotel division includes 120 hotels in top destinations around the world, ranging from boutique-style places to family-focused resorts. DERTOUR Group supports its guests throughout their entire journey with expertise and personalized care, ensuring that travel experiences turn into lasting memories.

A highly professional safety and crisis management system ensures that millions of travelers feel secure – before and during their trips. Automated early-warning systems, close coordination with authorities worldwide, and specialized teams enable a quick and proactive response.

As part of its commitment to sustainable tourism, DERTOUR Group actively invests in more responsible travel practices and long-term destination partnerships. The DERTOUR Foundation supports local communities and promotes environmental and cultural conservation through education, training, and development projects.

# METHODOLOGY

The European Travel Trend Report is built on a multi-layered methodological framework designed to generate robust, internationally comparable insights across DERTOUR Group's **16 European markets.**

## Data sources

- **Booking data analysis:** Aggregated and anonymized booking patterns across DERTOUR Group's diverse brands and markets provide early indications of emerging travel behavior.
- **Online survey research:** Representative quantitative survey data from 13 European countries, with 500–1,000 respondents per market, conducted between February 2 to February 6 2026.
- **Qualitative expertise:** Insights from Destination Management Companies (DMCs), local market specialists, and on-the-ground teams across 31 travel countries.

## Online survey sampling

The online survey was conducted by market research company Appinio in **13 European countries: Germany, Austria, Switzerland, Sweden, Norway, Finland, Denmark, the Czech Republic, Slovakia, Romania, Poland, France, and the United Kingdom.**

A total of 8,000 people between the ages of 18 and 65 were surveyed, representing the respective populations in terms of age and gender. The study includes 1,000 participants from Germany, France, and the UK, as well as 500 participants from each of the other markets, ensuring a comprehensive European sample.

## Analytical approach

- Cross-market comparison across 16 European DERTOUR Group countries
- Identification of structural and emerging travel trends
- Integration of qualitative signals from our global Destination Management Companies
- Alignment with booking trends to validate early market shifts

This methodology provides a comprehensive view of Europe's evolving travel landscape and ensures that insights in this report are grounded in market reality and strengthened by DERTOUR Group's scale, expertise, and local presence.

## Legal notice

### **DERTOUR Group GmbH**

Emil-von-Behring-Straße 6  
60439 Frankfurt am Main, Germany

Email: [communications@dertour.com](mailto:communications@dertour.com)

Phone: +49 (0) 69 9588-8000

Website: [www.dertour-group.com](http://www.dertour-group.com)

## Press and media inquiries

### **Gabriela Micu-Motroc**

Manager Group Corporate Communications

Email: [gabriela.micu-motroc@dertour.com](mailto:gabriela.micu-motroc@dertour.com)

Phone: +49 (0) 69 9588-1601

Management: Christoph Debus

Registered Office: Cologne

Commercial Register: Cologne District Court

Registration no. (HRB): 89567

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