



What's up Germany?

Relevant trends in holiday
demand until 2030

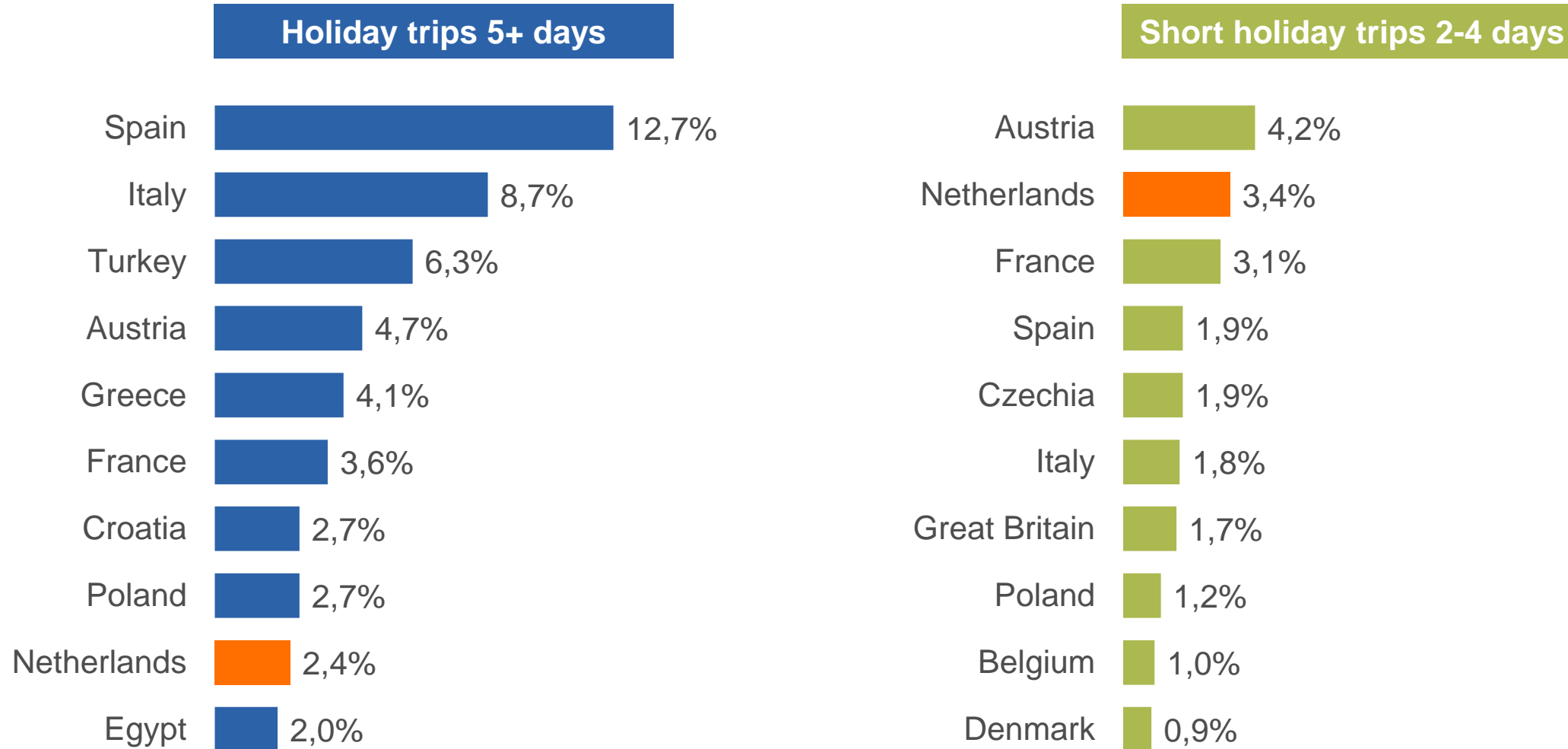
*17 November 2020
Ulf Sonntag*



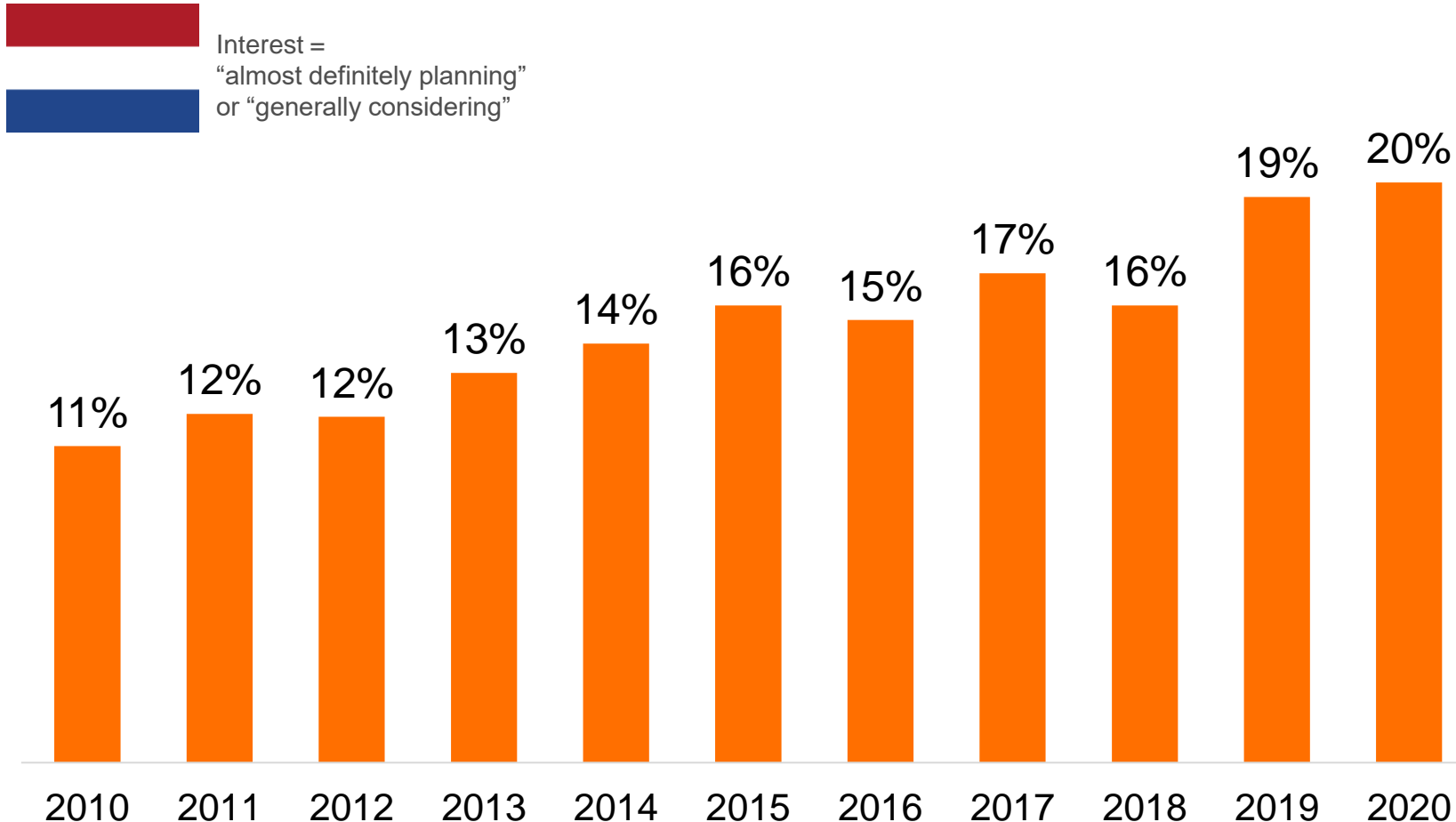
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The Netherlands on the German holiday market

Positioning of NL on the German leisure market



Interest to travel to NL, 2010-2020



NL next 3 years

20% (14 million)

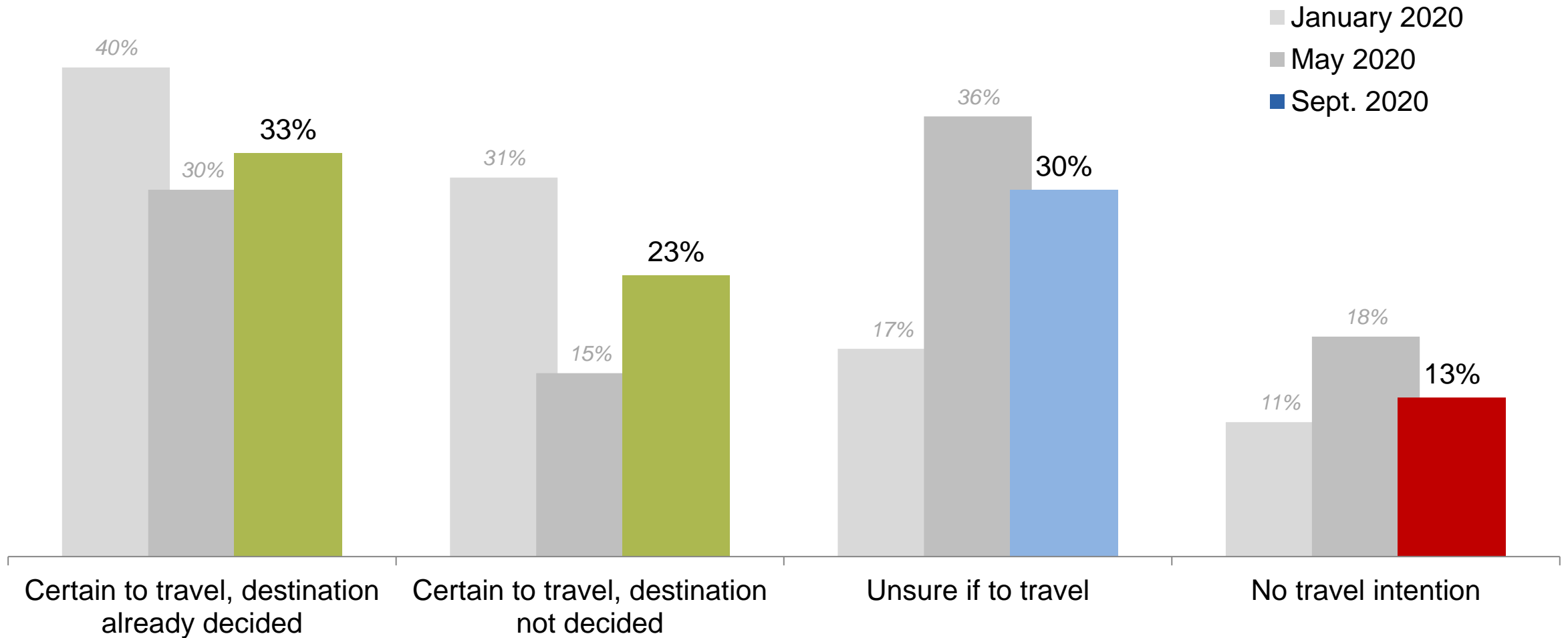
of the population in Germany (aged 14+) are "almost definitely planning" or "generally considering" to spend a (short-)holiday in the Netherlands in the years 2020-2022.

Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2019-2021) And which of these countries would you generally consider as a holiday destination in the next three years?"

Basis: German/German-speaking population 14+ years in Germany; Source: Reiseanalyse 2010-2020

Planned travel behaviour 2020/2021

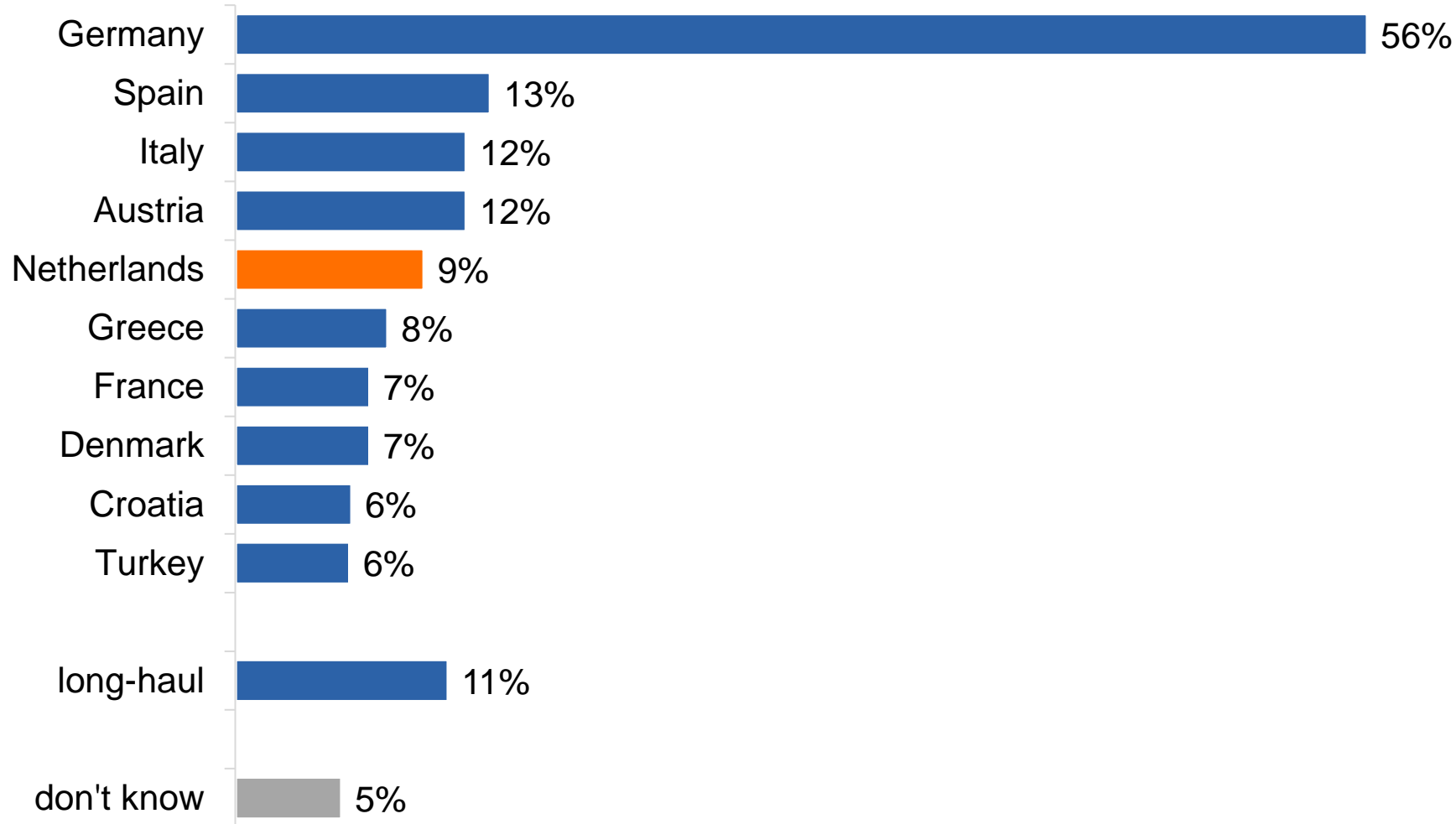
Holiday plans next 12 months



Question: *When you think [about the next 12 months], do you have any holiday plans for that time?*

Basis: German-speaking population 18-75 years of age; source: RA 2021, Corona Recovery Module 09/2020 and previous studies

Holiday planners: Destination preferences next 12 m.

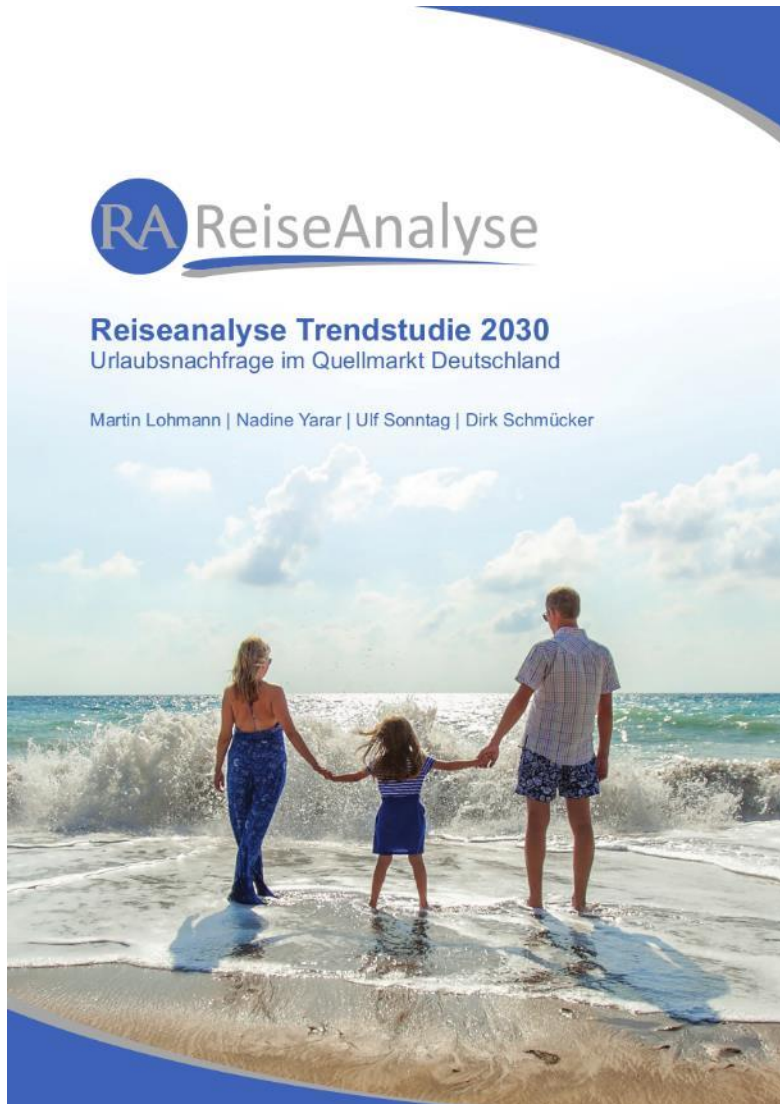


Question: *If you go on holiday in [...] where will you (most likely) go?*

Basis: German-speaking population 18-75 years of age, who will probably/probably travel in [...]; Source: RA 2021, Corona Recovery Module 09/2020

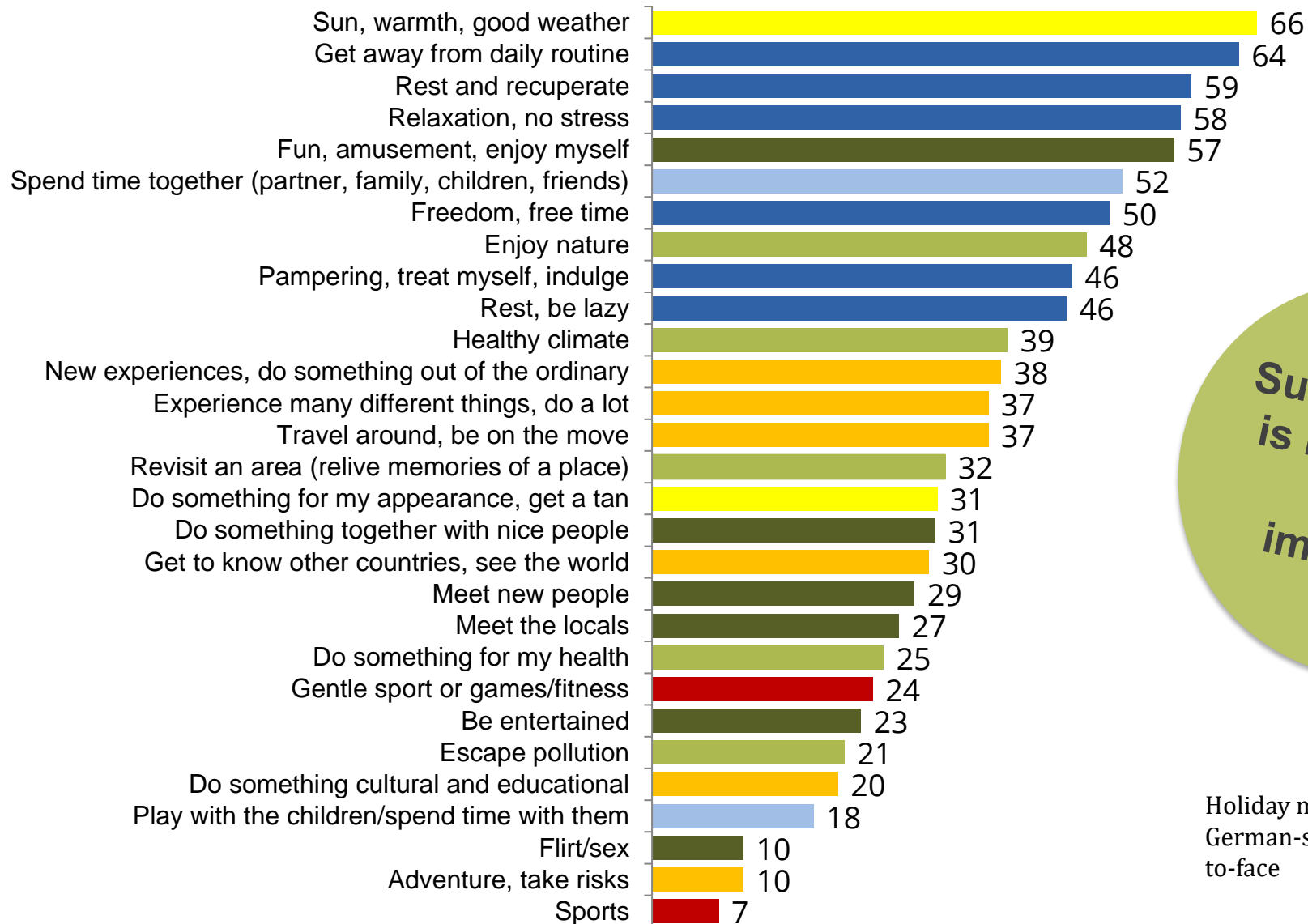
Trends 2030

RA Trend Study 2030

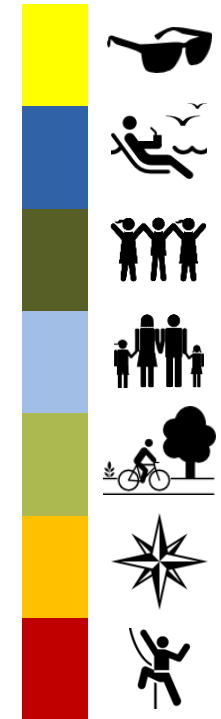


- ▶ Just published (English in 12/2020)
- ▶ Trends of German holiday demand until 2030
- ▶ (also covering:) mid-/long-term impact of the Covid-19 pandemia
- ▶ More info: <https://reiseanalyse.de/trend-study-2030/>

Holiday motivations of Germans



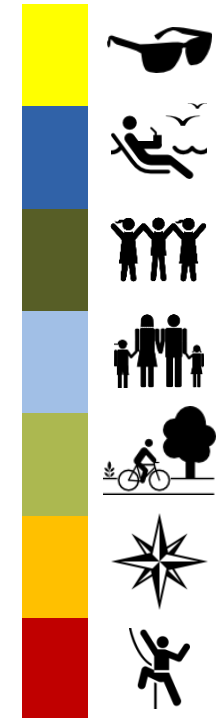
Sustainability is becoming more important



Holiday motivations – “particularly important”, in %
German-speaking population aged 14 or over, RA 2020 face-to-face

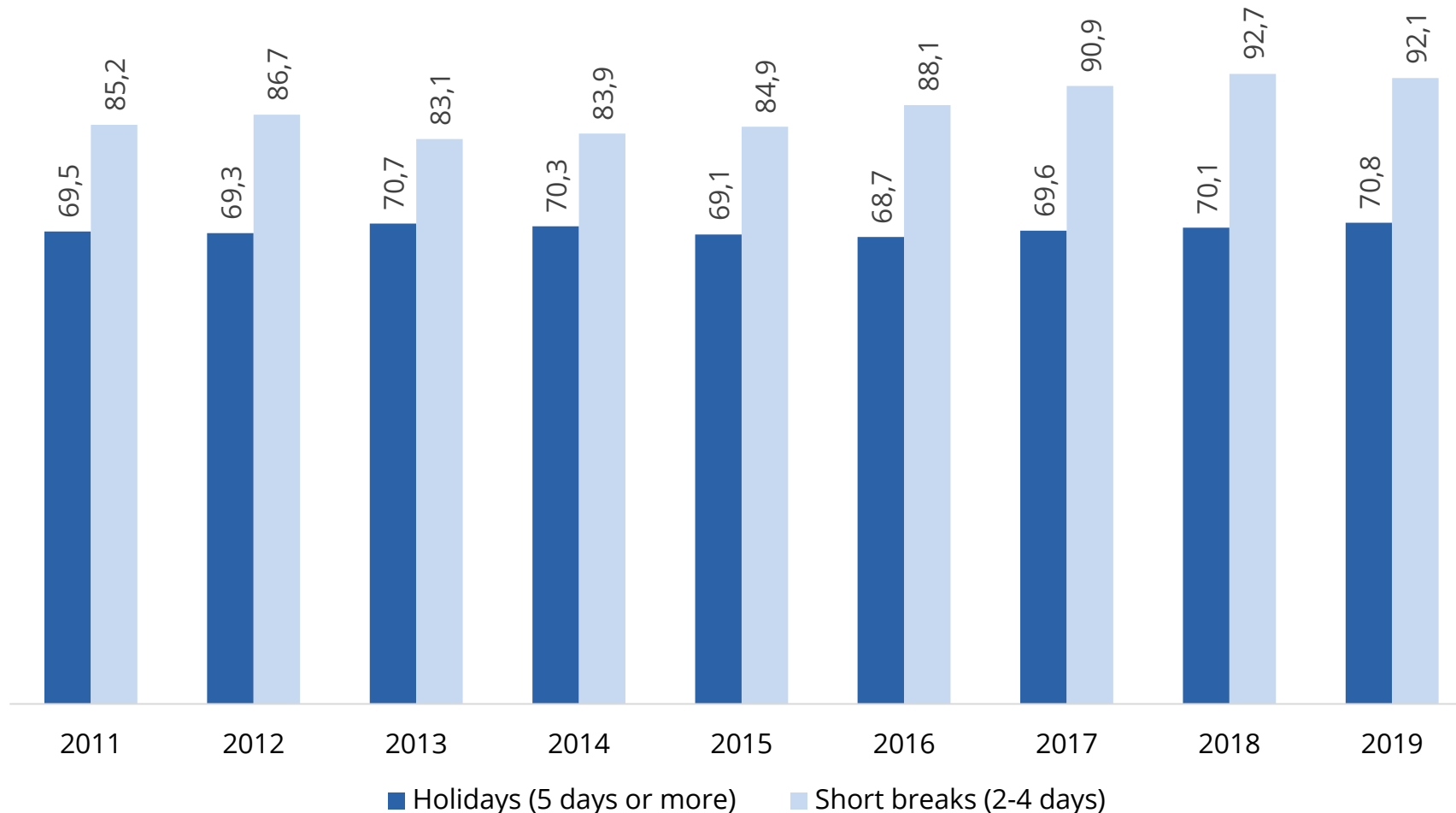
Holiday motivations of Germans, 1980-2020

	Jan. 1980	Jan. 1990	Jan. 2000	Jan. 2010	Jan. 2020
The top 5 motivations are...					
Mentioned most frequently...	Switch off, unwind (66%)	Switch off, unwind (79%)	Relaxation, ... (59%)	Relaxation, ... (69%)	Sun, warmth, ... (66%)
	Get away from daily routine (58%)	Get away from daily routine (75%)	Get away from daily routine (54%)	Get away from daily routine (67%)	Get away from daily routine (64%)
	Be with nice people (54%)	Rest and recuperate (67%)	Freedom, free time (52%)	Sun, warmth, ... (66%)	Rest and recuperate (59%)
	Rest and recuperate (49%)	Enjoy nature (61%)	Rest and recuperate (50%)	Rest and recuperate (63%)	Relaxation, ... (58%)
	Spend time together (55%)	New experiences... (56%)	Spend time together (42%)	Fun, enjoy... (60%)	Fun, enjoy... (57%)
“Particularly important” only to few people are...					
Mentioned the least...	... Find oneself (17%)	Explore, risk, ... (15%)	Gentle sport and games, ... (9%)	Flirt, sex (14%)	Flirt, sex (10%)
	Sports (13%)	Hobbies (14%)	Explore, risk, ... (8%)	Explore, risk, ... (12%)	Explore, risk, ... (10%)
	Flirting and love (10%)	Flirting and love (12%)	Sports (8%)	Sports (11%)	Sports (7%)



2020 list with 29 possible answers; different lists and questions in other years; multiple responses possible
 Ranking based on percentages for “particularly important”; holiday-makers in the German population aged 14 or over (1980: only West Germans), RA 1980, 1990, 2000, 2010, 2020 *face-to-face*

Holidays and short breaks from 2011 to 2019 and trend 2030

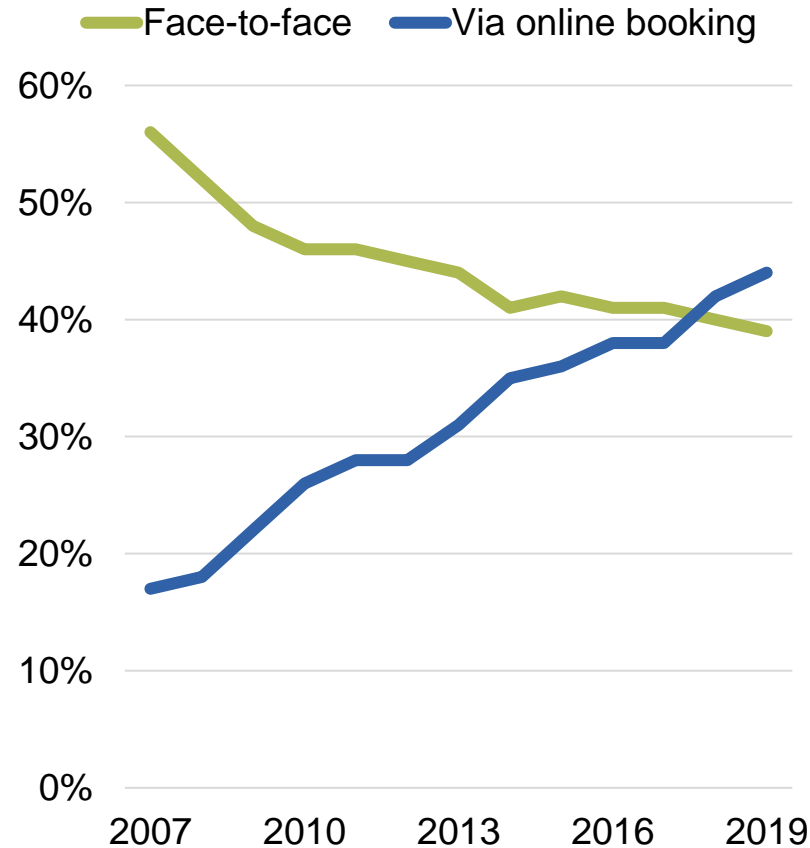
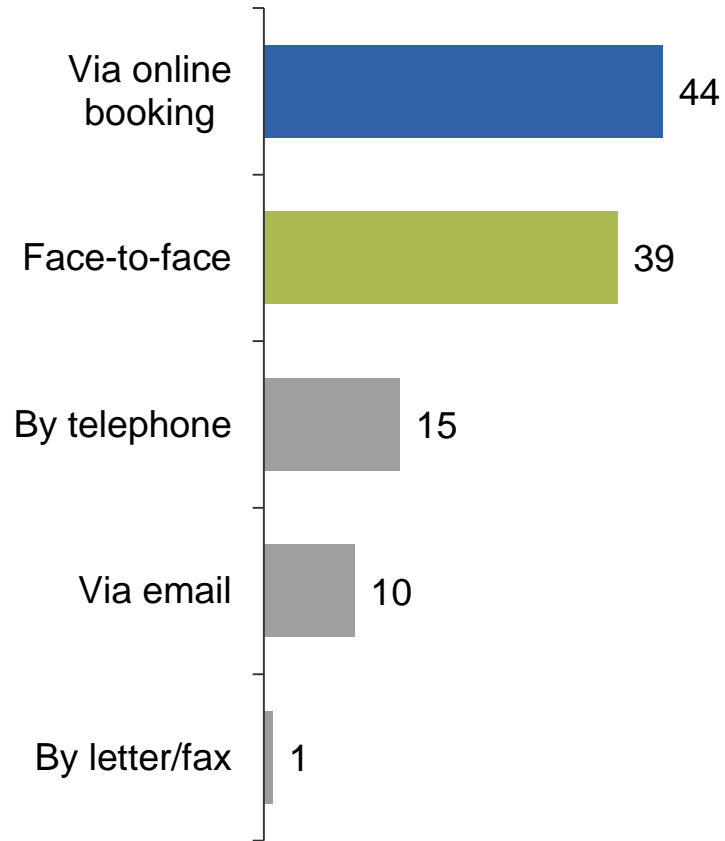


Trend 2030:
69.5 million
Holiday trips

Trend 2030:
100.4 million
Holiday trips

Holidays and short breaks, in million
 Holidays: German-speaking population aged 14 or over (for short breaks: extrapolated for the 70+ and 75+ age groups respectively), RA 2011-2020 *face-to-face* and *online*

Booking channels 2007 to 2019, trend 2030



Trend 2030:

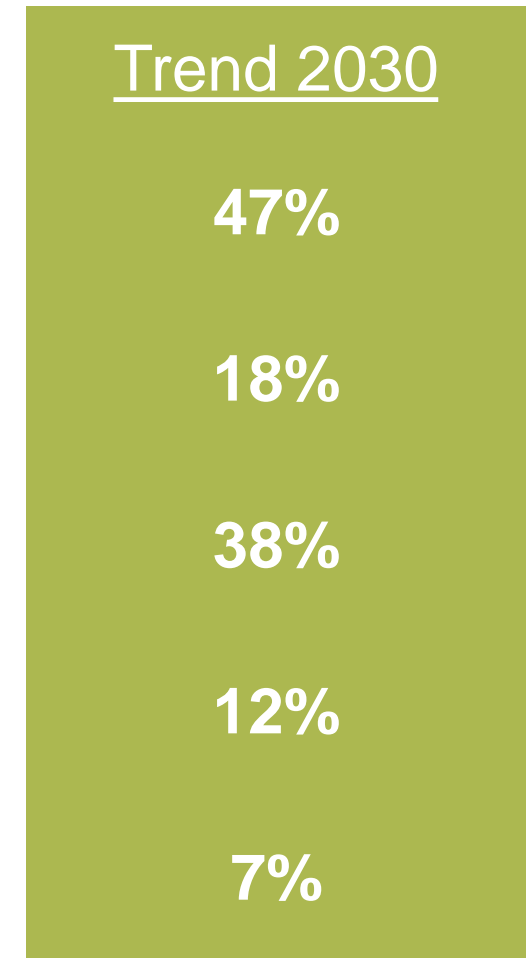
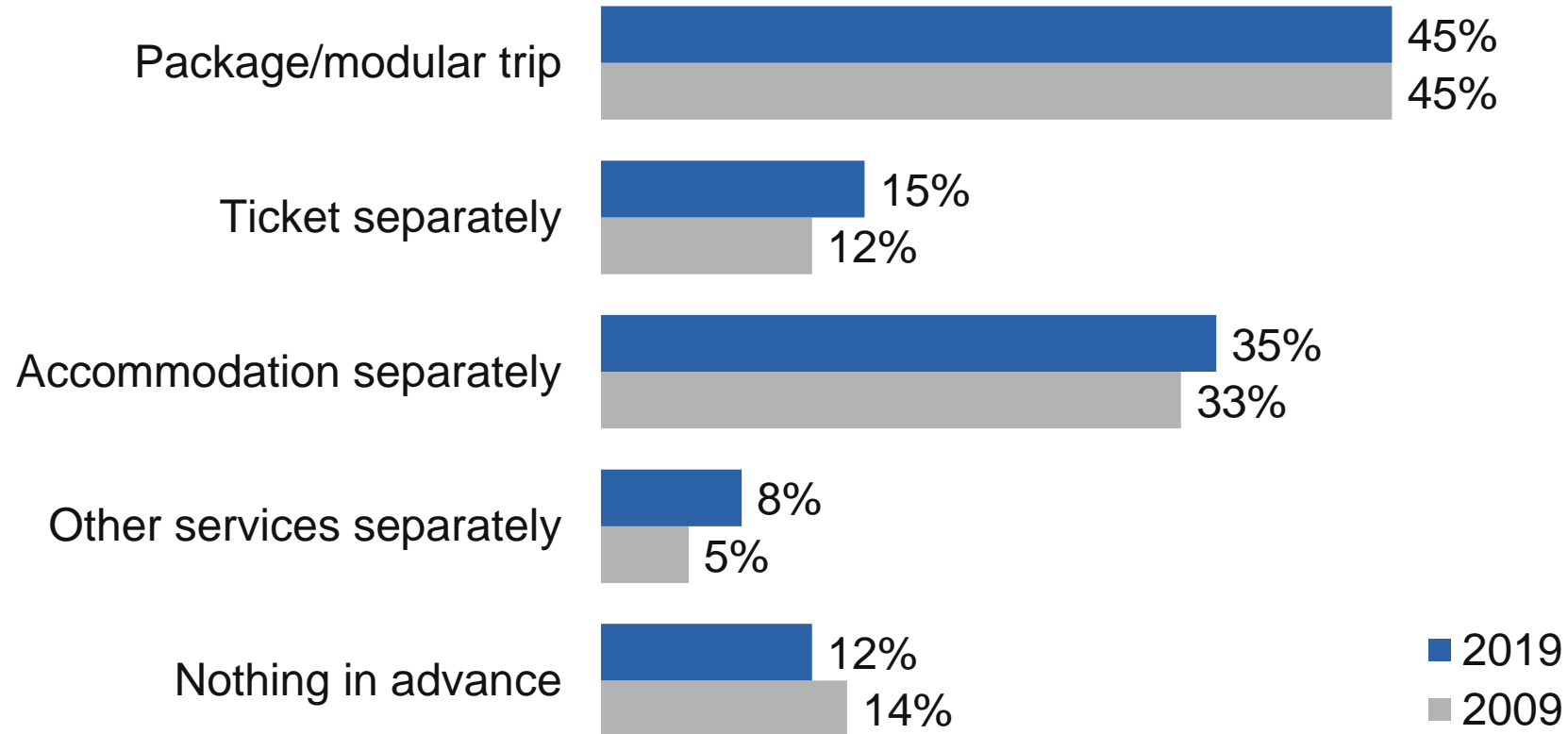
66%
online booking

Trend 2030:

30%
face-to-face

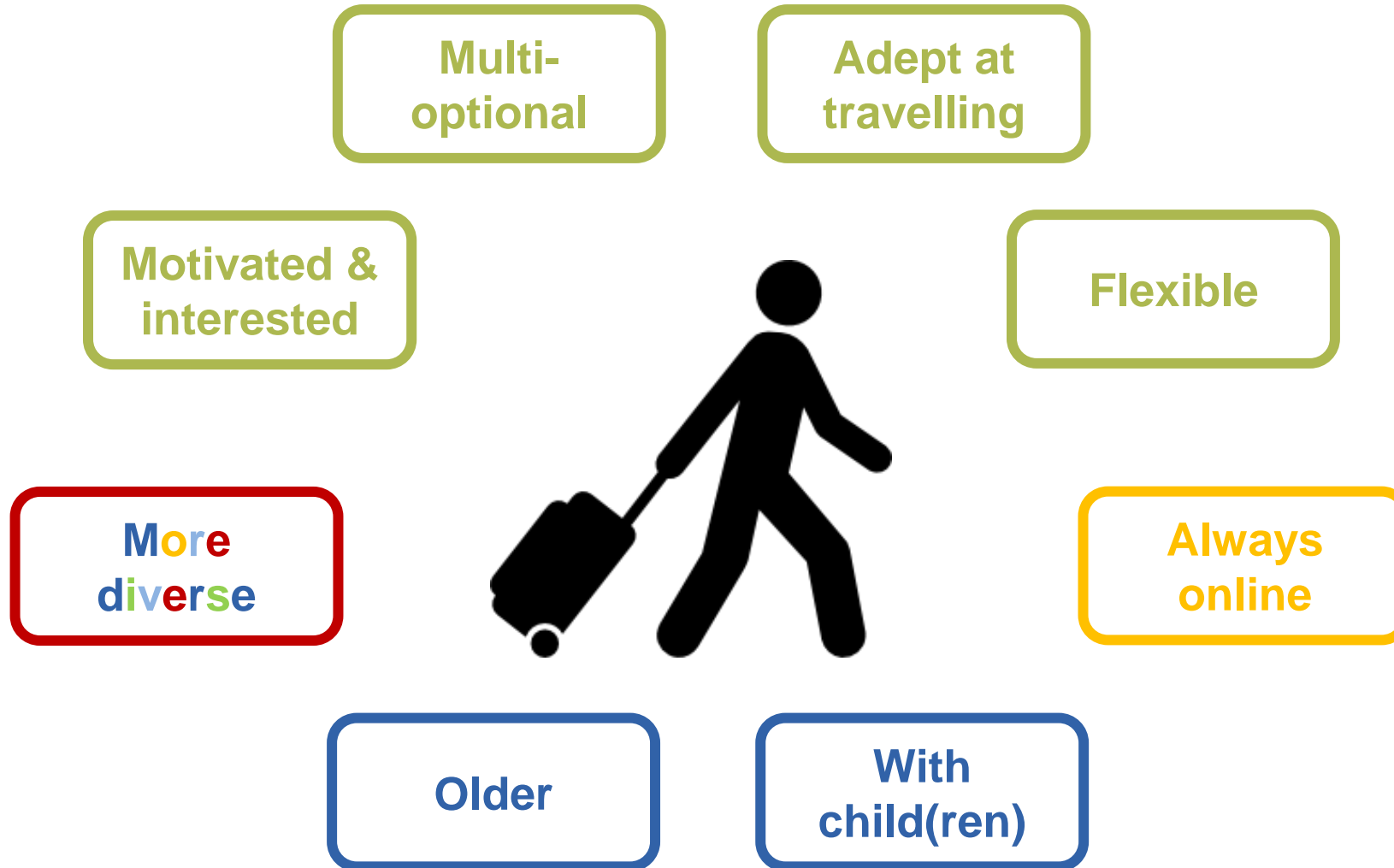
Holidays (5 days or more) with advance booking, in %, total > 100% since multiple responses possible
 German-speaking population aged 14 or over, RA 2008-2020 *face-to-face*

Holiday organisation 2009-2019, trend 2030



Holidays (5 days or more), in %, total > 100% since multiple responses possible
 German-speaking population aged 14 or over, RA 2008-2020 *face-to-face*

Holiday travel 2030: The tourists ...



Holiday travel 2030: Travel behaviour ...

Holidays (of five days or more)



Germany
17.4m
(-1.3m)



Abroad
52.1m
(±0m)



Total
69.5m
(-1.3m)

Short breaks (two to four days)



Germany
73.2m
(+4.3m)



Abroad
27.2m
(+3.6m)



Total
100.4m
(+8.3m)



Average duration of a holiday: 12.3 days (-0.1 days)

Holidays with children aged up to 13: 13.2m (+0.5m)



Holidays...



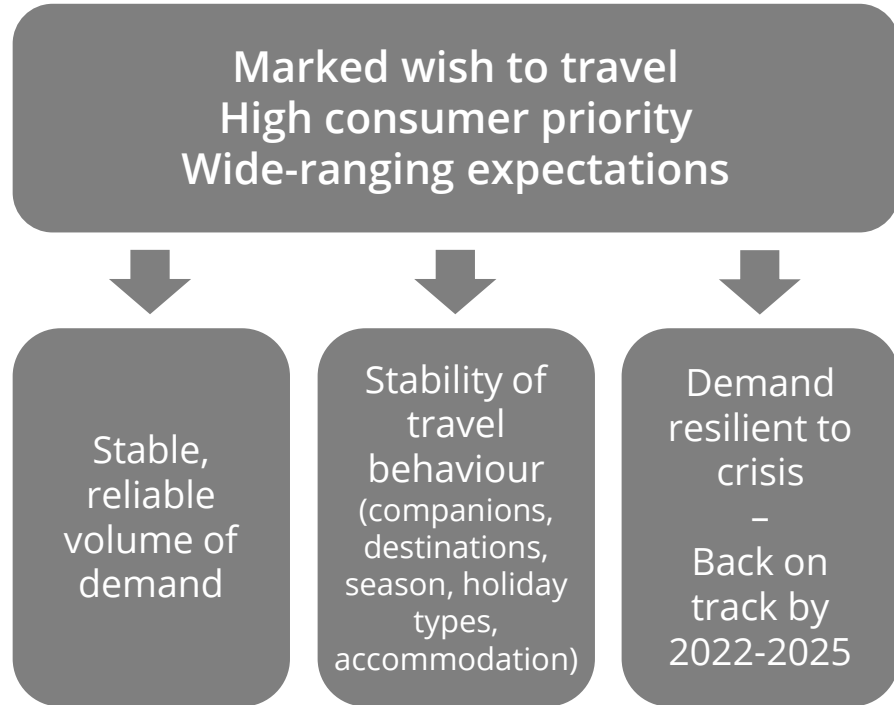
- ... booked online: 42.6m (+15.0m)
- ... booked with travel agent: 18.1m (-1.3m)
- ... booked with services provider: 24.8m (+4.0m)
- ... with no advance booking: 4.9m (-3.6m)



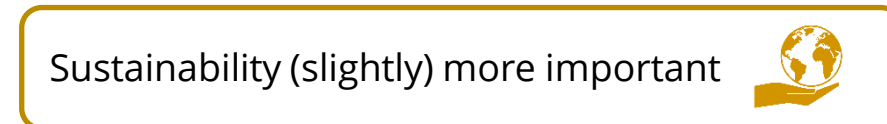
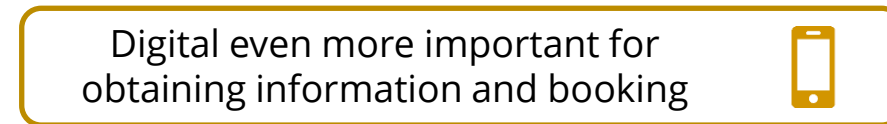
Back on track
2022 - 2025



Holiday travel 2030: Stability and Dynamics



Stability



Dynamics



Discussion: What does this mean for the NL?



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