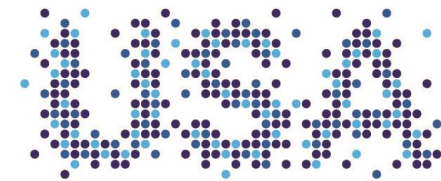




## What's up Germany?

Relevant trends in holiday demand  
for German travel to the U.S.

23 February 2021  
Ulf Sonntag



Visit  
TheUSA  
.com

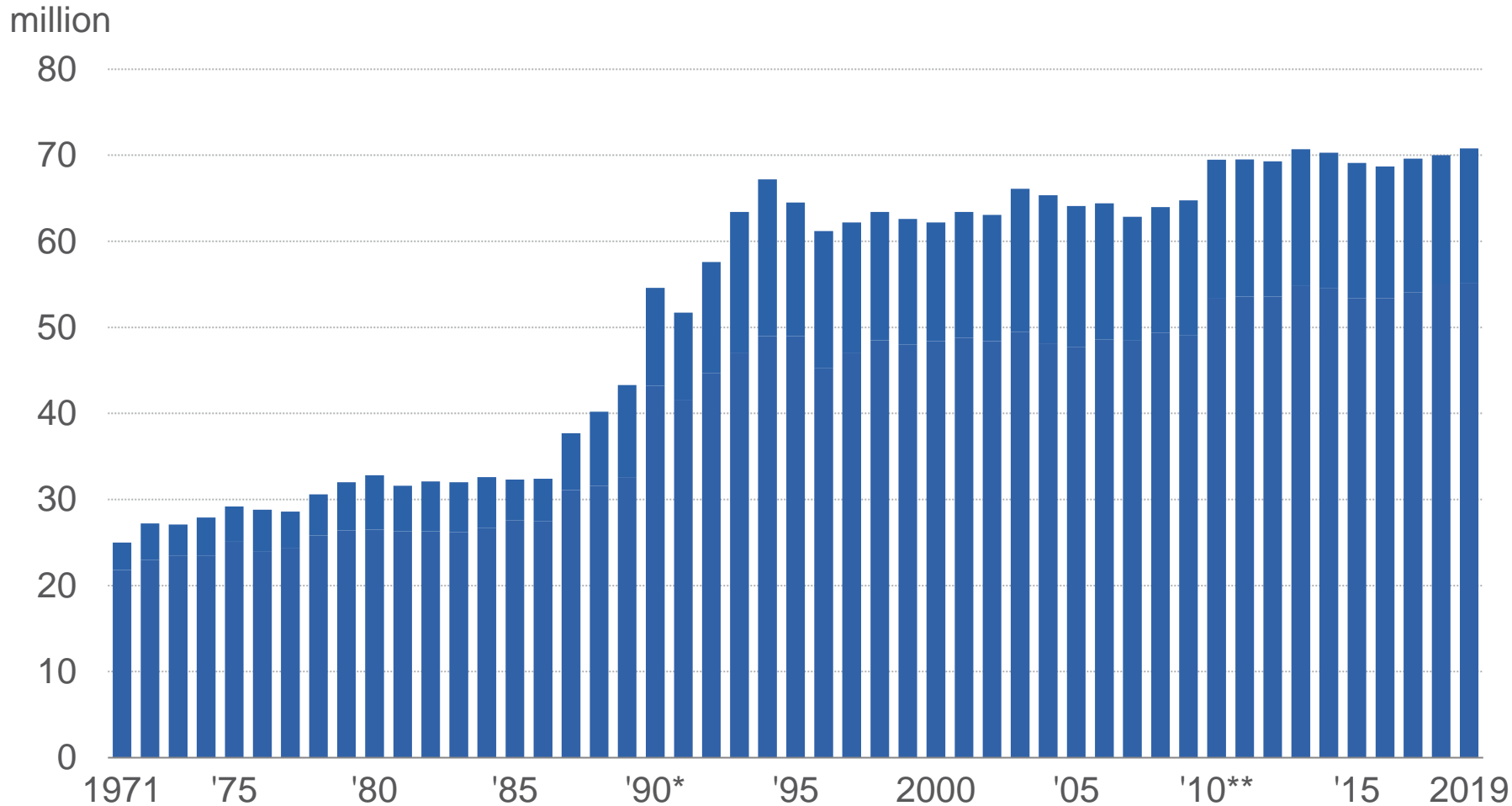
# Origin of the insights and data

- Data from our REISEANALYSE
- Longest-running (since 1970) and most established regular study regarding leisure travel demand of the Germans
- Domestic tourism and outgoing tourism
- Volumes, behavior, attitudes, interests
- Interviews, representative for the population in Germany
- Normal years: Three surveys (12,000 interviews in total)
- 2020: Five surveys (12,000 interviews in total)
- More info: <https://reiseanalyse.de/home/>



# **The USA on the German holiday market** *[pre-COVID]*

# Volume of holiday travel, 1971-2019



**71 million**  
holiday trips (5+ days)

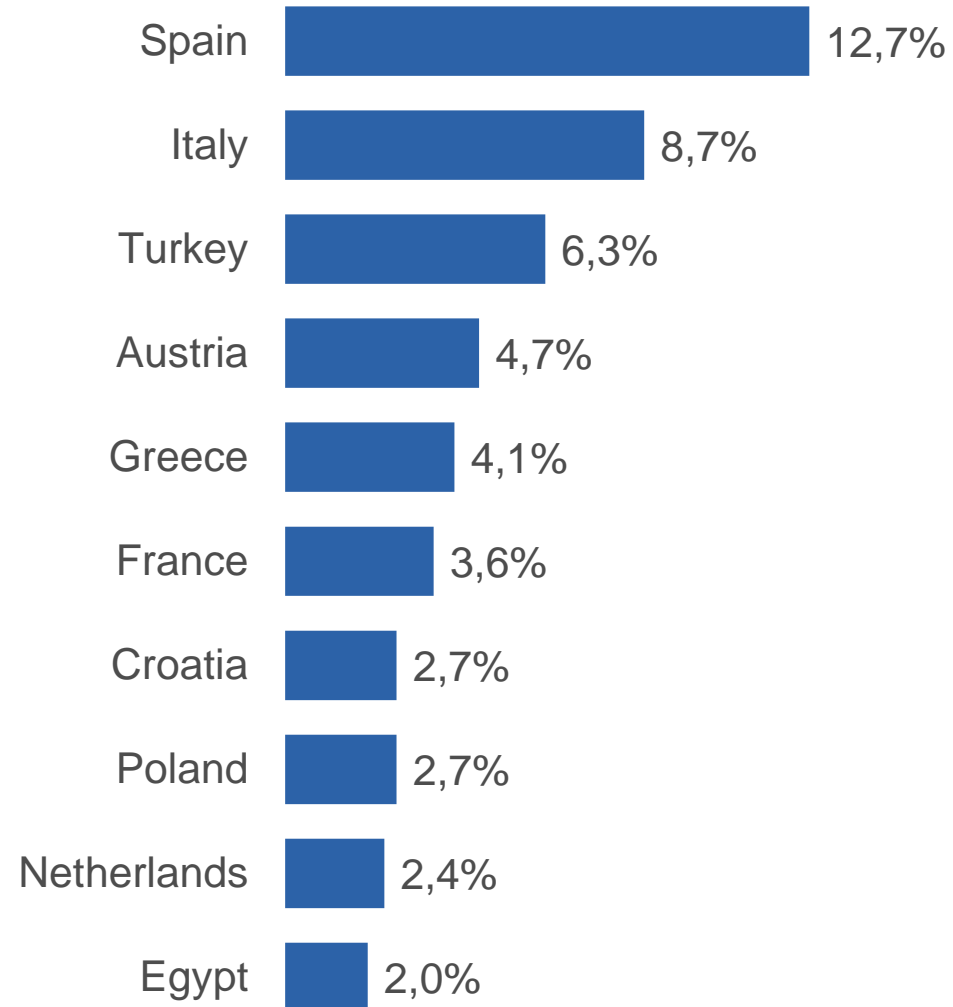
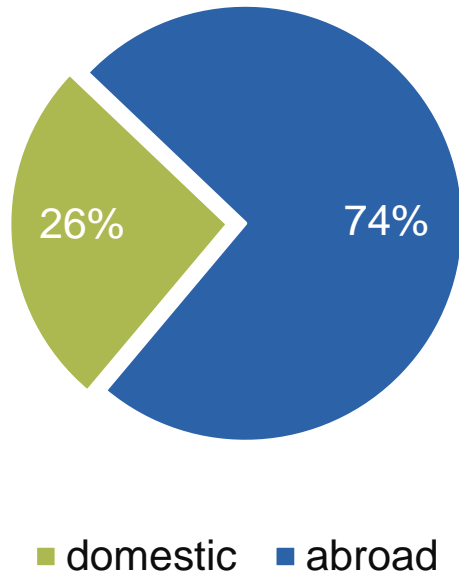
**55 million**  
holiday travellers

**73 billion €**  
holiday spending

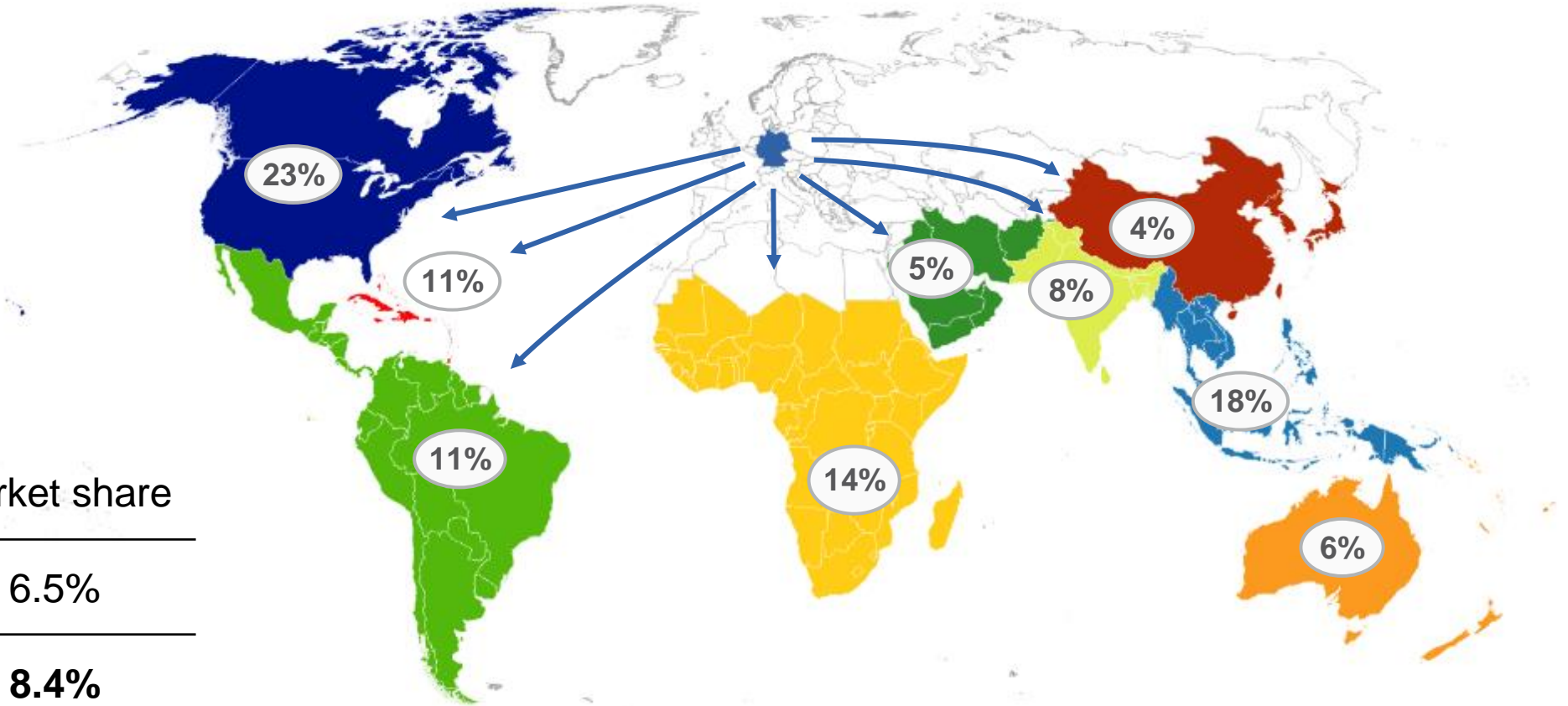
Basis: holiday trips of 5 days or more of the German-speaking population aged 14 and over in Germany  
\* From 1990 incl. holiday trips of the East German population; \*\* From 2010 incl. holiday trips of German-speaking foreigners  
Source: RA 1971-2020

# Holiday trips 5+ days: Volume and destinations 2019

**70.8 million**  
holiday trips 2019



# Long haul leisure travel: Volume and destinations 2019



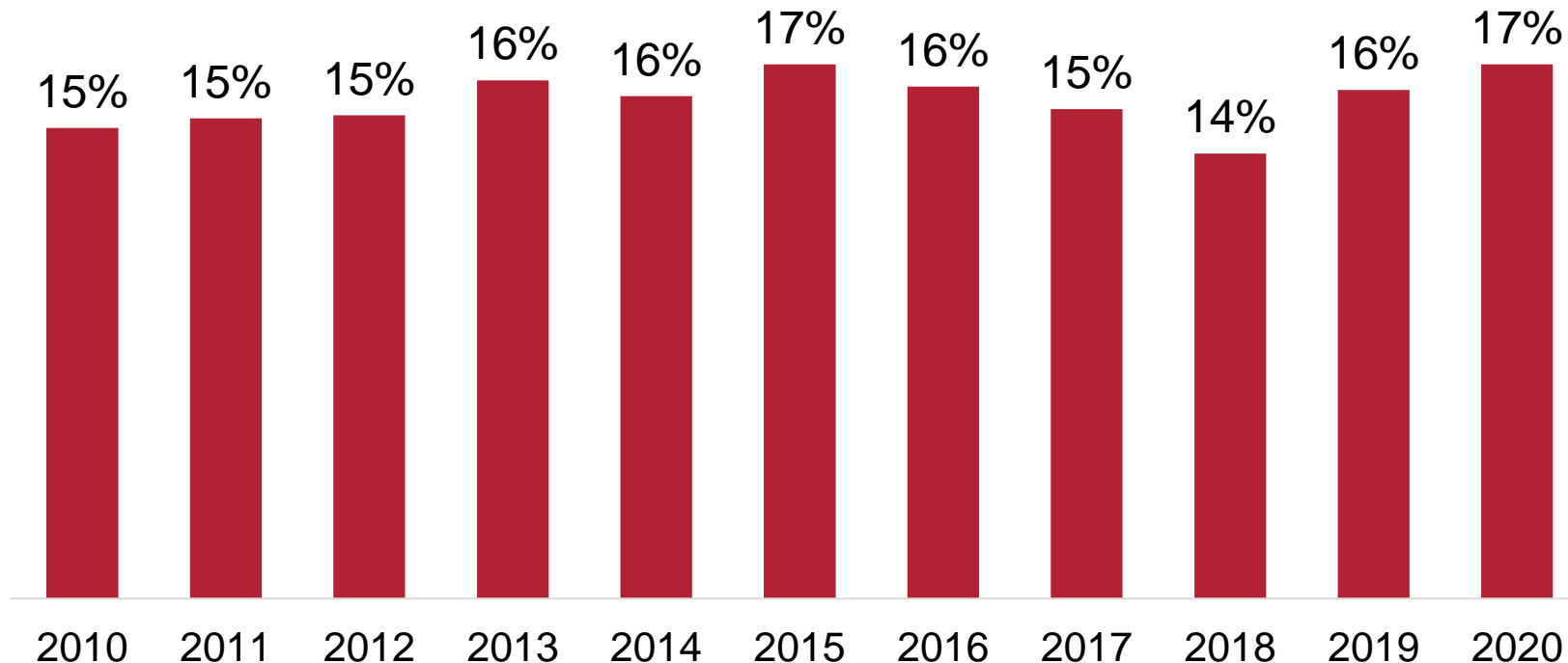
Year	Total	Market share
2010	4.5m	6.5%
<b>2019</b>	<b>5.9m</b>	<b>8.4%</b>

Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over; Source: Reiseanalyse 2020

# Interest to travel to USA, 2010-2020



Interest =  
"almost definitely planning"  
or "generally considering"



## USA next 3 years

**17% (12 million)**

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

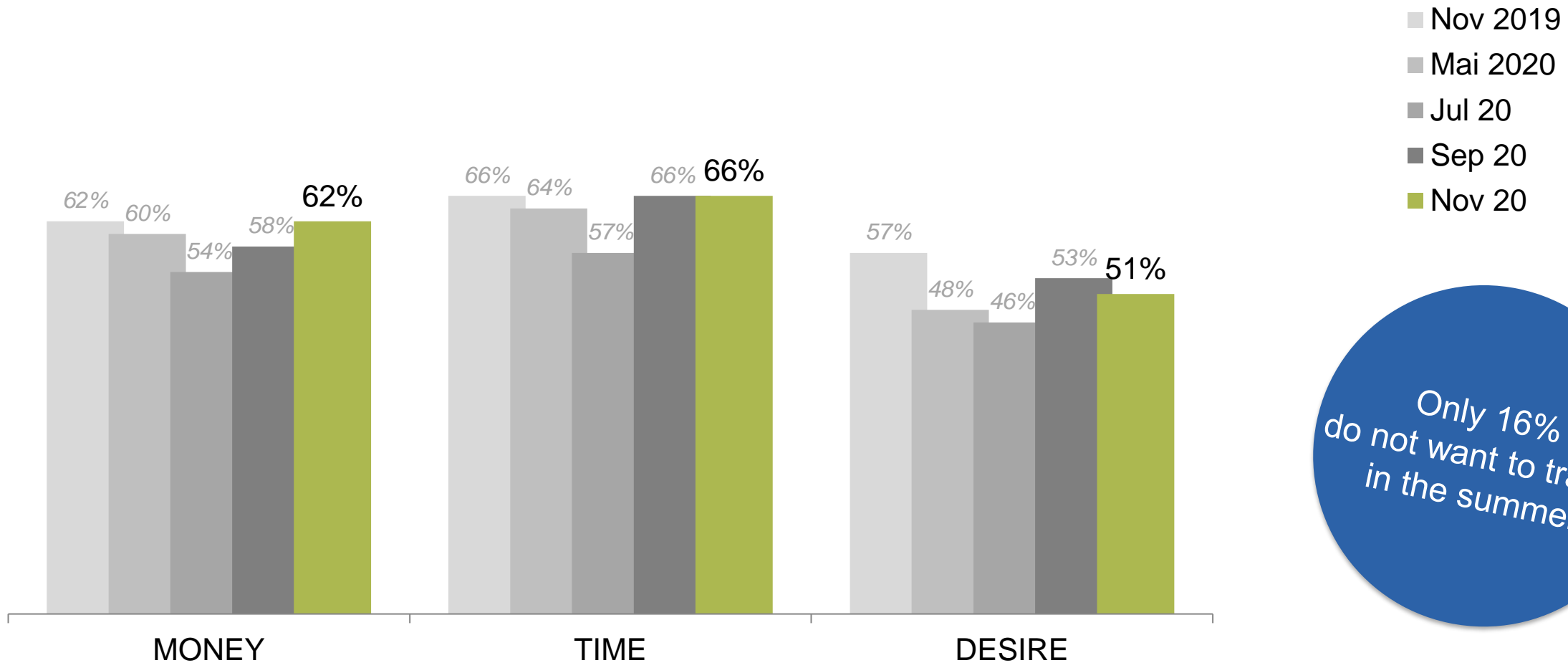
Are you almost definitely planning to go on a holiday to one of these countries in the next three years? (2019-2021) And which of these countries would you generally consider as a holiday destination in the next three years?"

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

# **Planned travel behavior spring/summer 2021**

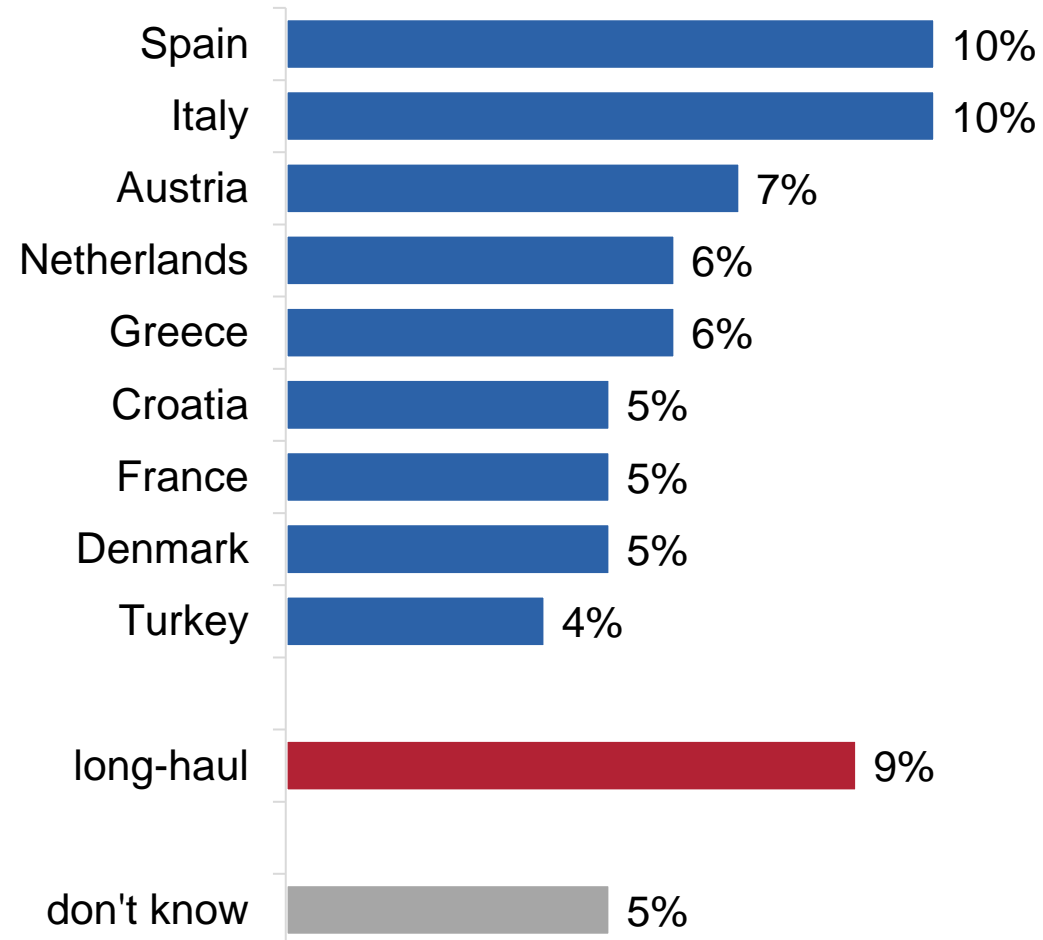


# Ability and desire to travel in the next 12 months



Only 16%  
do not want to travel  
in the summer

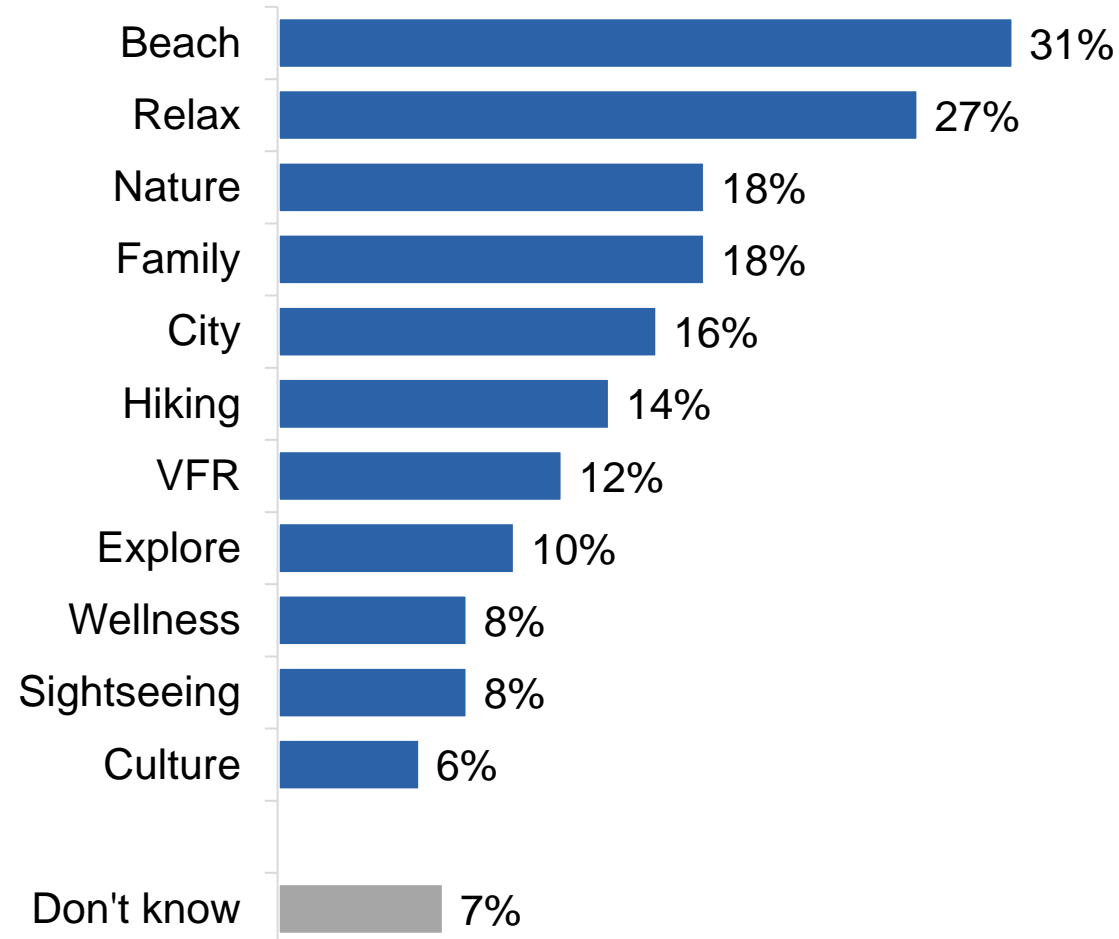
# Destination preferences spring/summer 2021



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

# Preferred forms of holiday spring/summer 2021



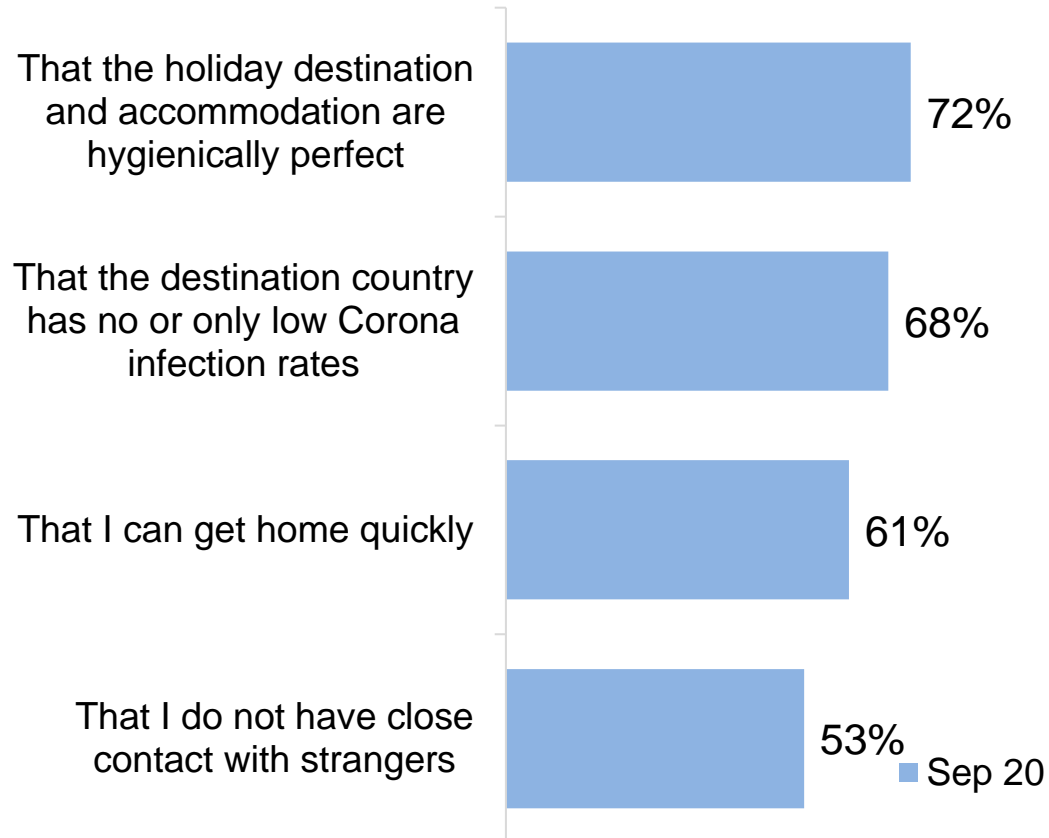
Question: *What kind of holiday trips are you planning to take in [...] (probably) the country?*

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

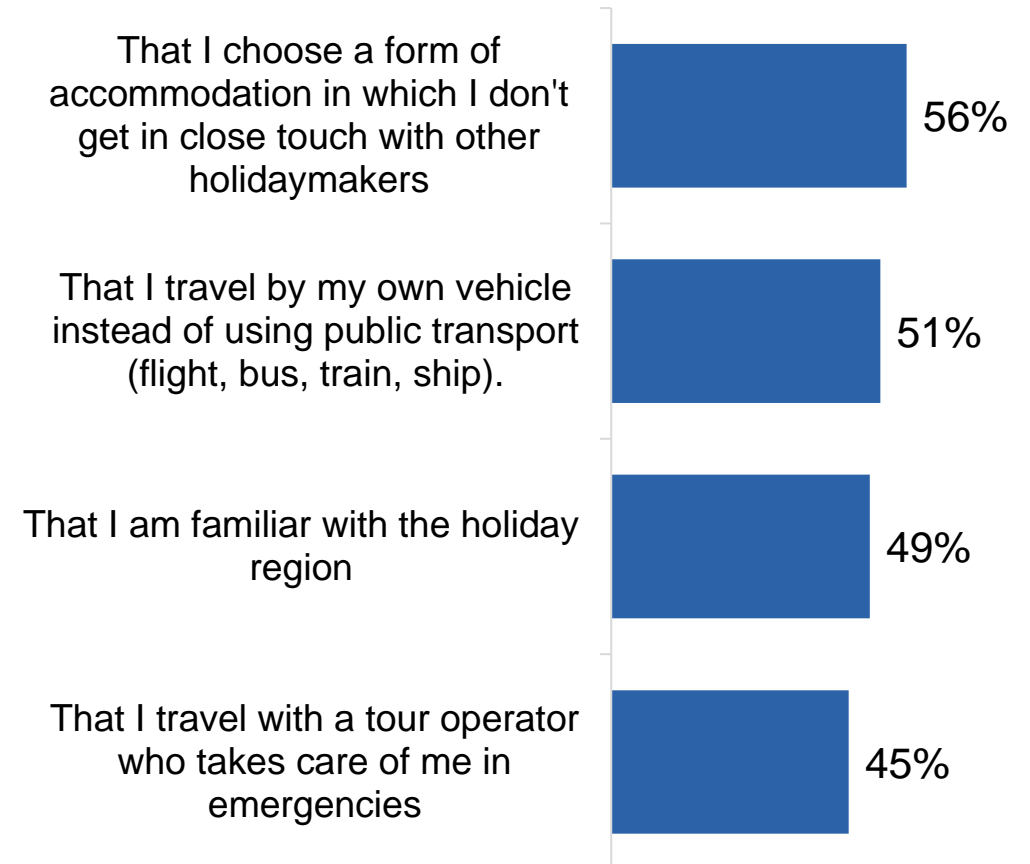
# COVID-19 related travel attitudes

# Corona requirements and strategies for holiday travel

## Requirements



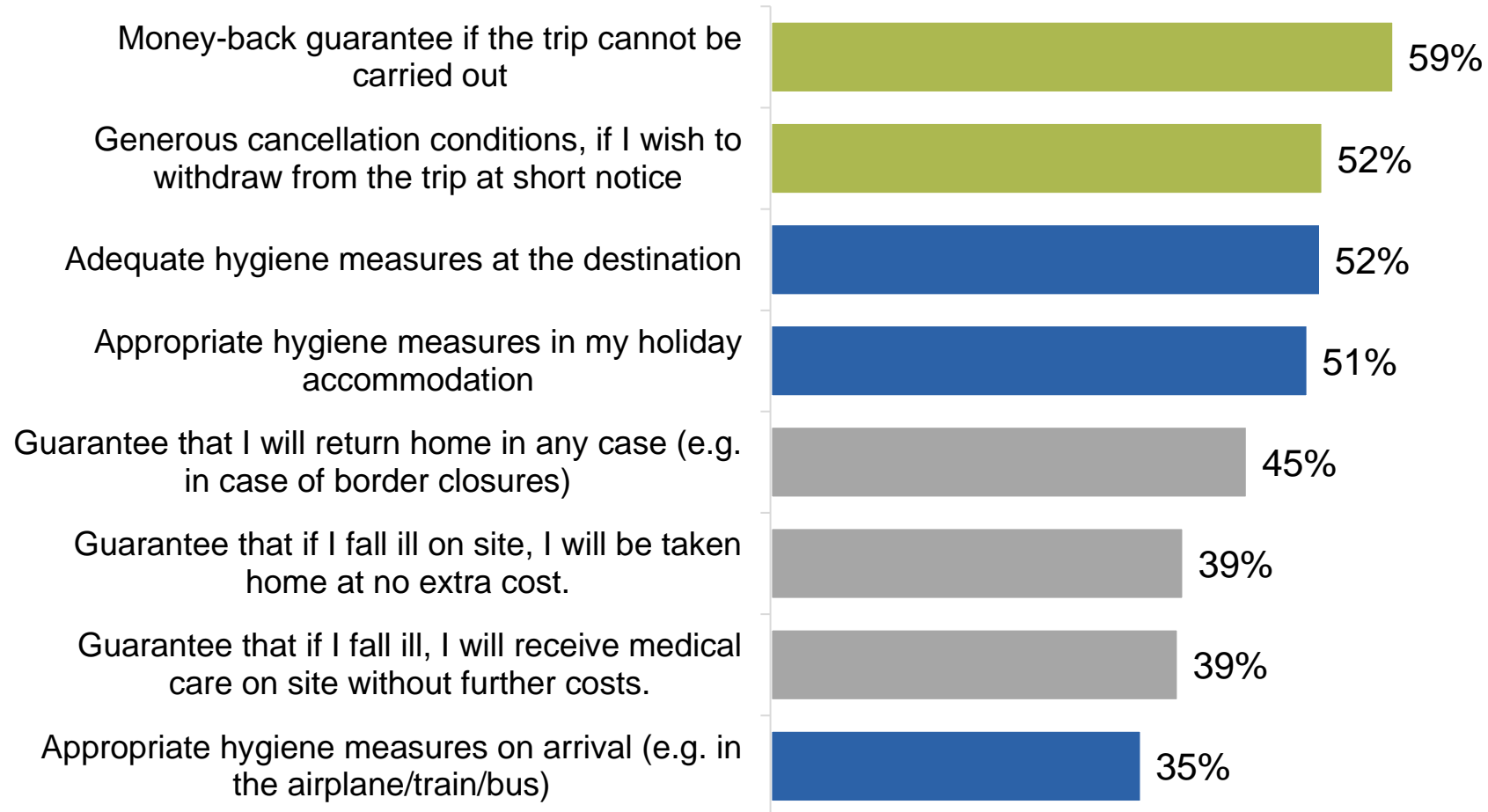
## Strategies



Question: *Based on the experience of the past few months, which have been marked by the rapid spread of the coronavirus and the measures taken to contain the infection, what will you pay particular attention to when travelling on holiday in future?*

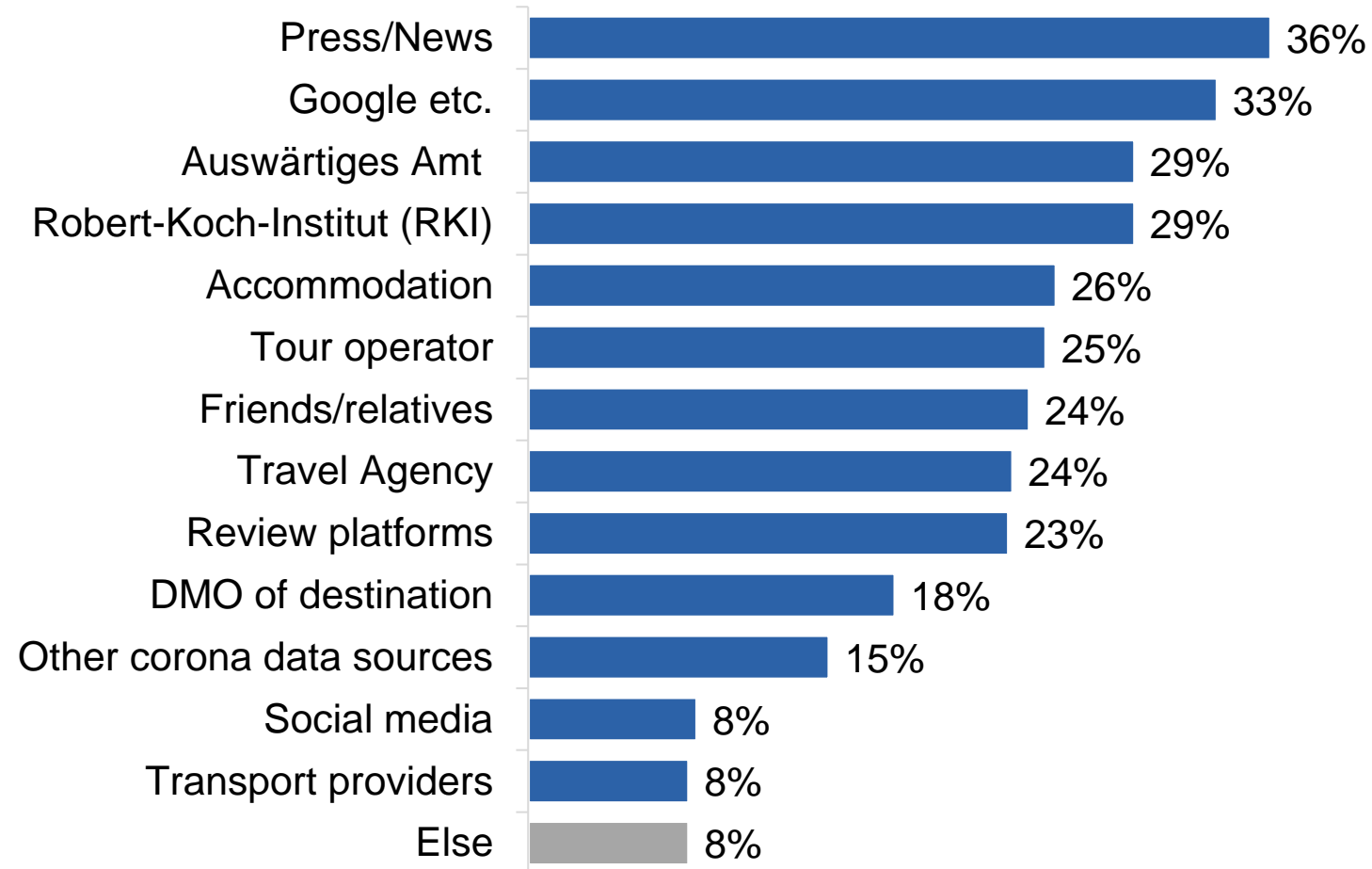
Basis: German-speaking population 18-75 years; source: RA 2021, Corona Recovery Module 09/2020, FUR/IMT/NIT special survey "Corona crisis" in RA online 5/2020

# Booking criteria for future holiday trips



Question: *If you book a specific travel offer in the future, which of these aspects will you pay particular attention to?*  
Basis: German-speaking population 18-75 years; source: RA 2021, Corona Recovery Module 09/2020

# Preferred sources of holiday information



Question: *Where do you prefer to get information about travel offers and the situation at your holiday destination?*

Basis: German-speaking population 18-75 years of age, who are certain/most likely to travel in the next 12 months; source: RA 2021, Corona Recovery Module 09/2020

# Corona challenges for the tourism industry

**uncertainty**

**short-  
termism**

**higher  
need for  
information**

**flexibility**

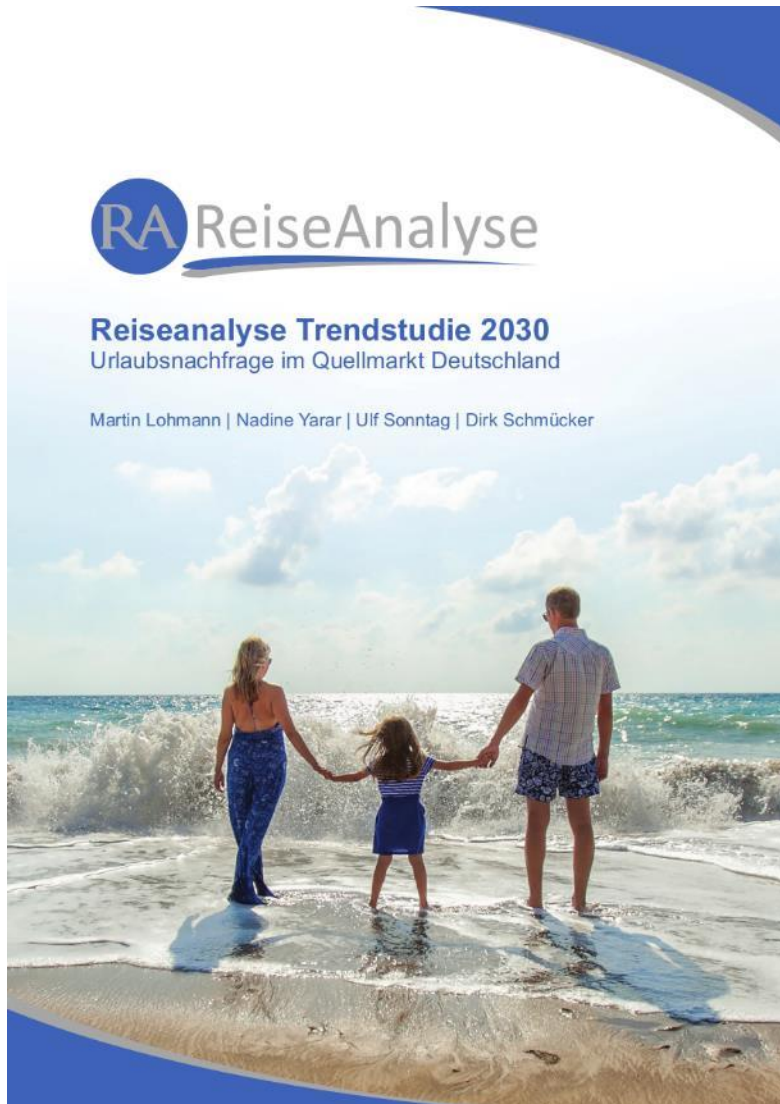
**fairness &  
transparency**



# Trends 2030

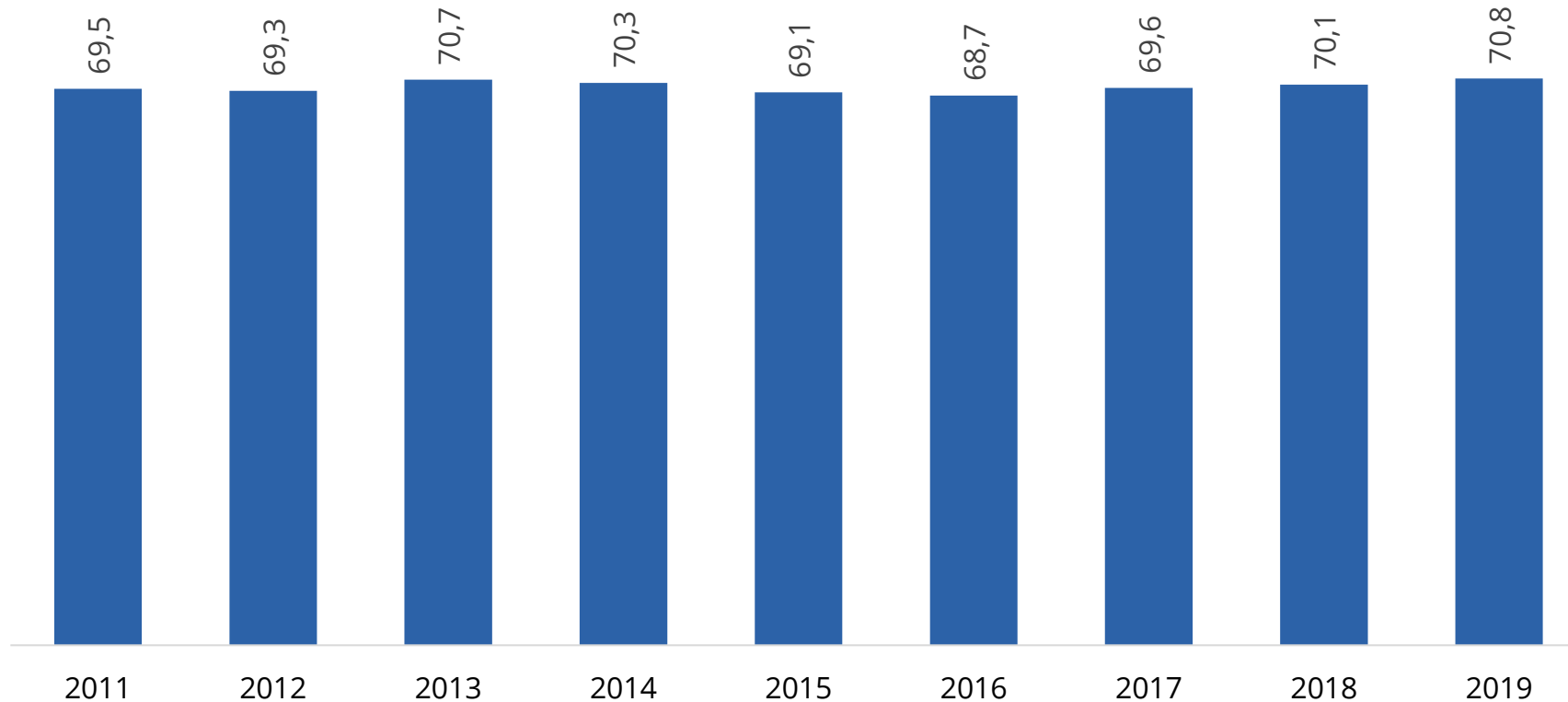
*[Post-COVID]*

# RA Trend Study 2030



- ▶ Just published
- ▶ 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/>

# Holidays and short breaks from 2011 to 2019 and trend 2030



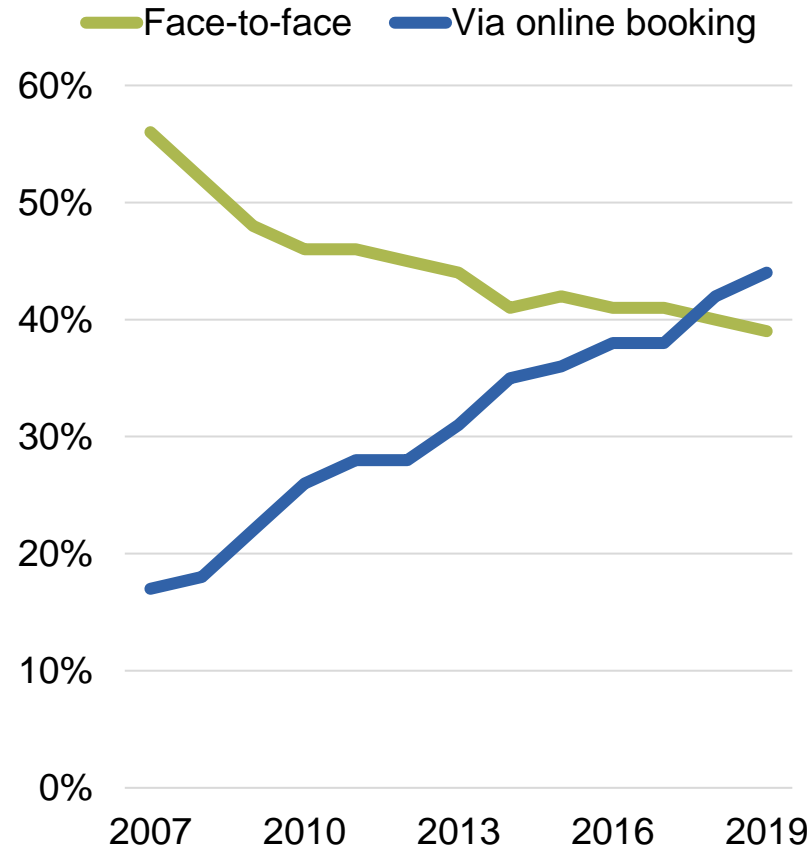
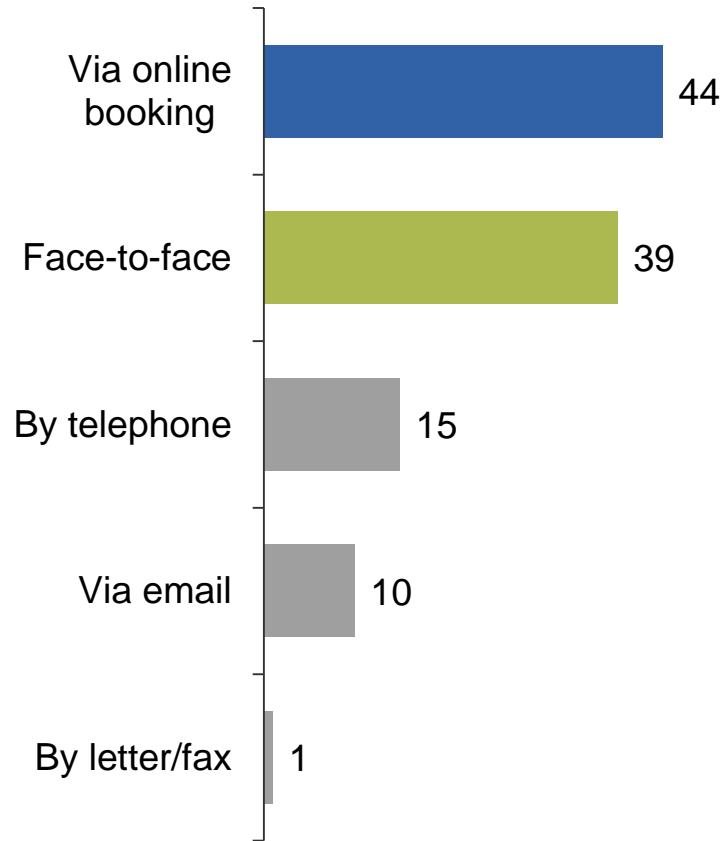
Trend 2030:

**69.5 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:**

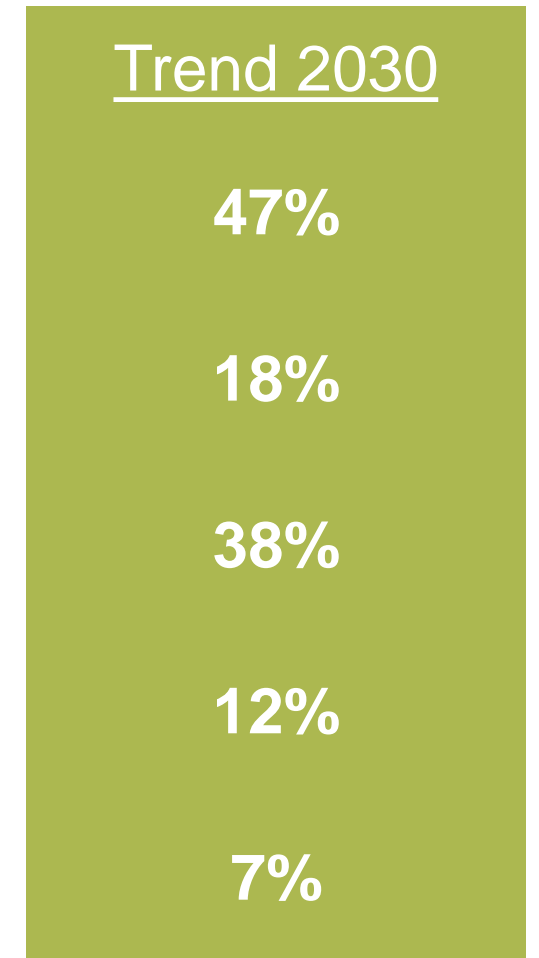
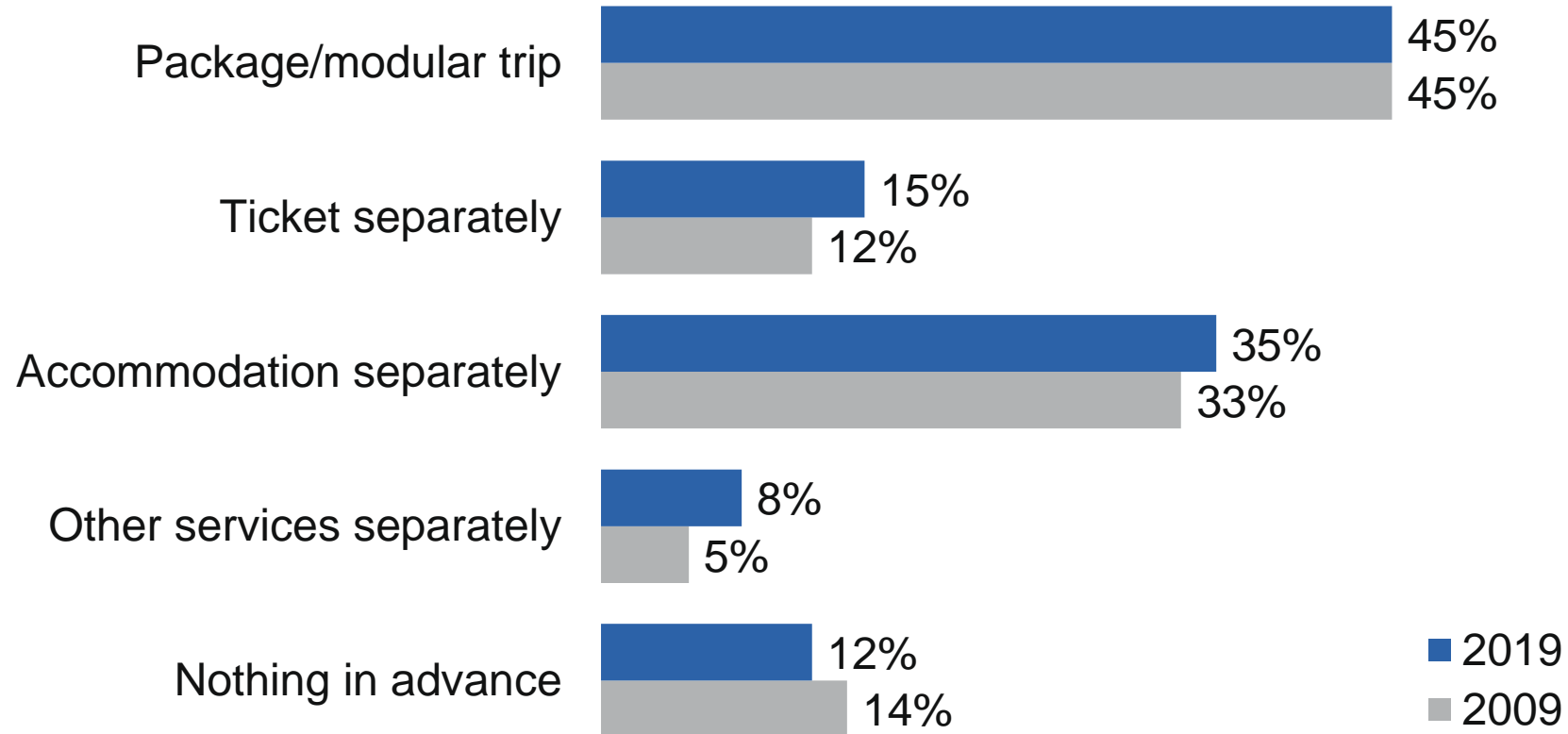
**66%**  
online booking

**Trend 2030:**

**30%**  
face-to-face

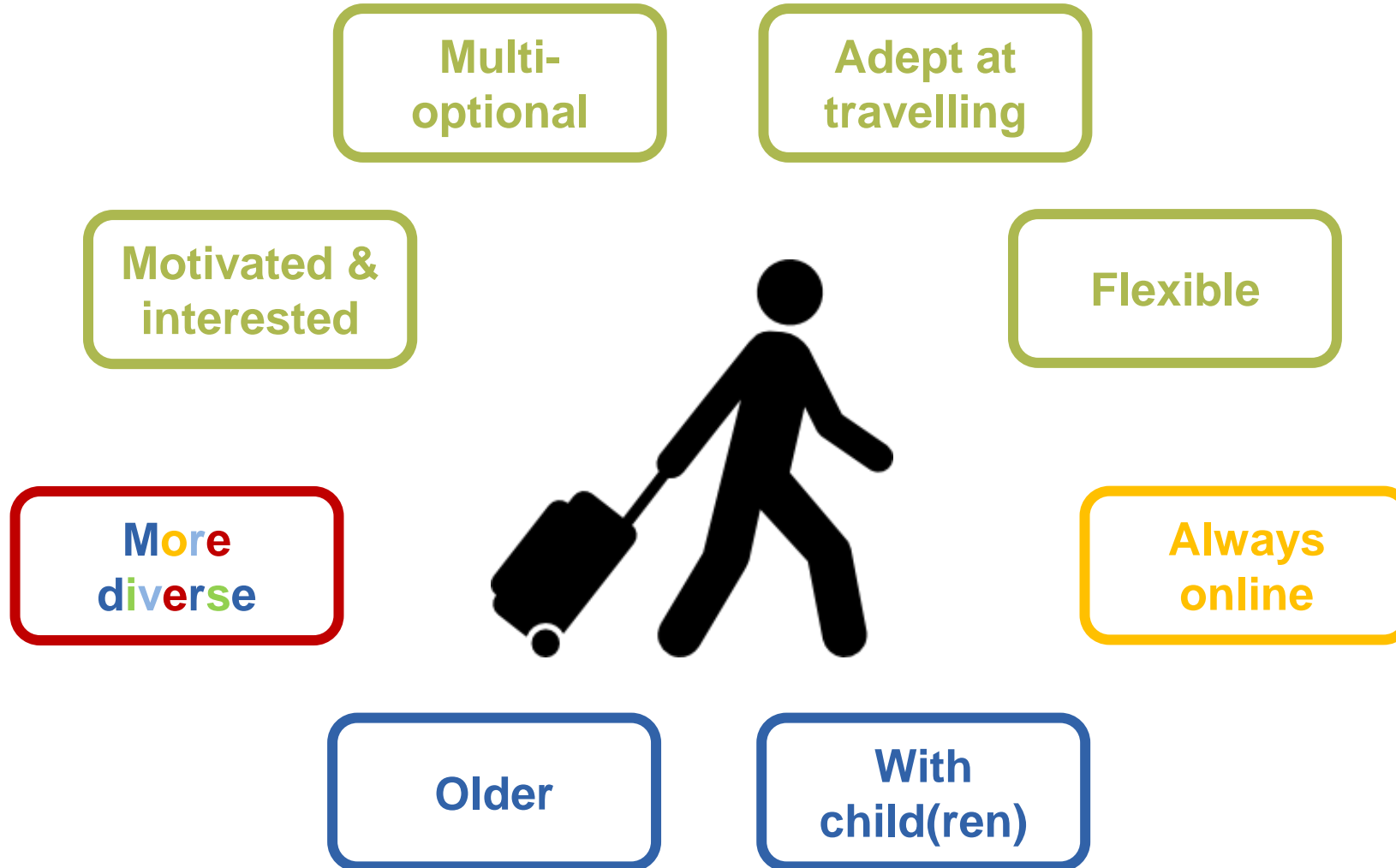
Holidays (5 days or more) with advance booking, in %, total > 100% since multiple responses possible  
 German-speaking population aged 14 or over, RA 2008-2020 *face-to-face*

# 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 behavior ...




**Back on track**  
2022 - 2025



### Holidays (of five days or more)

 <b>Germany</b> 17.4m (-1.3m)	 <b>Abroad</b> 52.1m (±0m)	 <b>Total</b> 69.5m (-1.3m)
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**Average duration of a holiday: 12.3 days (-0.1 days)**

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

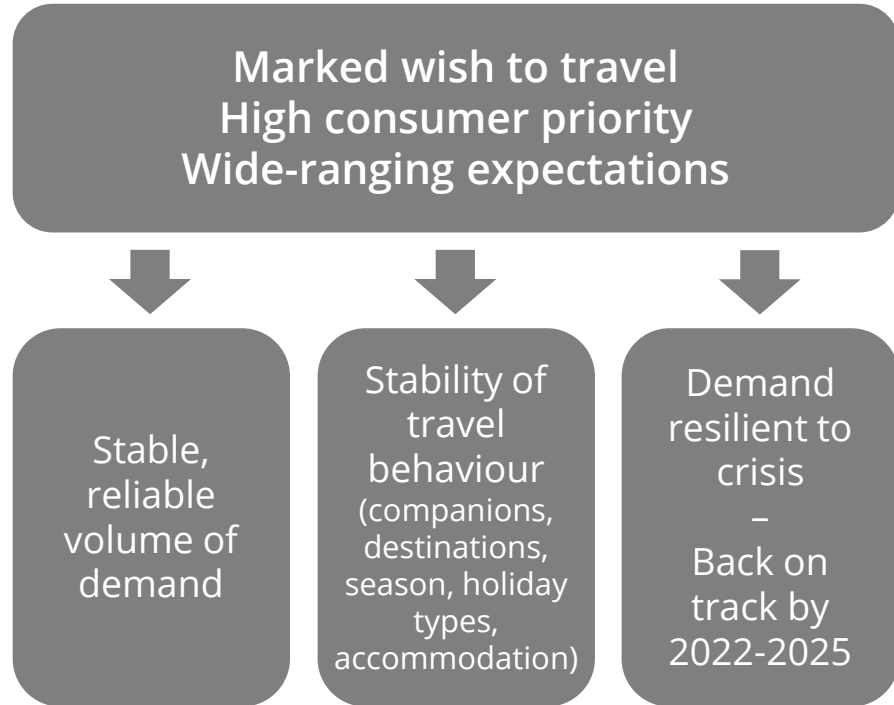


### Holidays...



- ... 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)

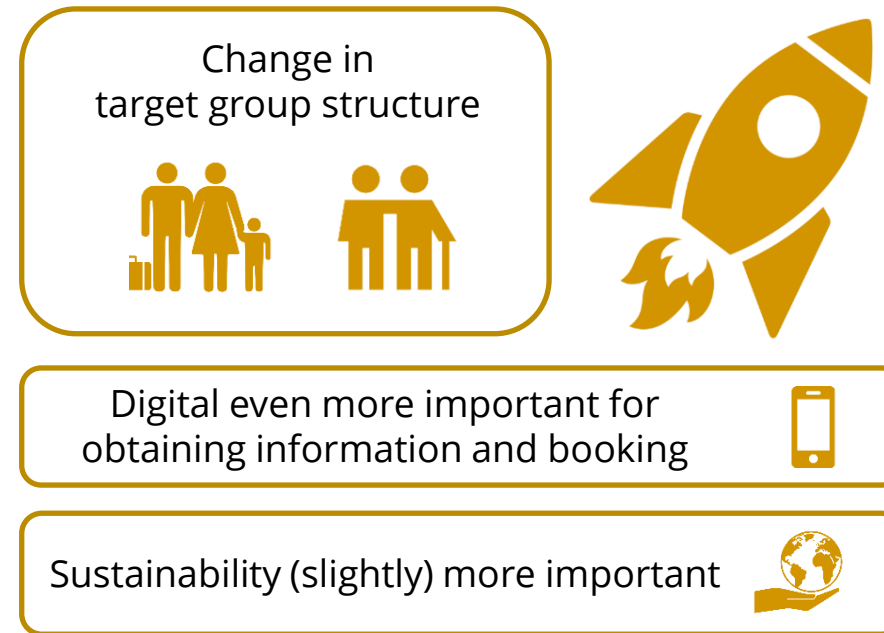
# Holiday travel 2030: Stability and Dynamics



Stability

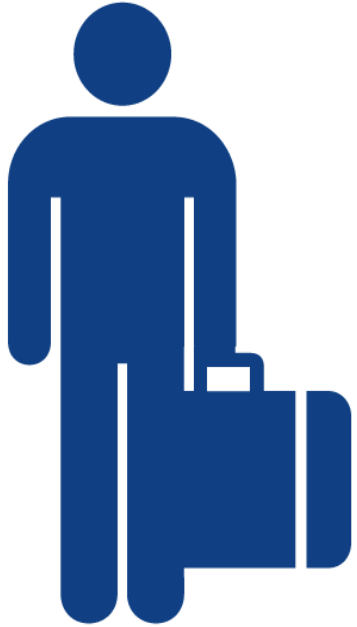


## Dynamics





# Conclusion



- ▶ The Germans' desire for holiday travel remains on a high level
- ▶ They will travel in high volumes, even during the pandemic, if it is possible – everything now depends on the development of the pandemic and the political regulations in the markets and destinations.
- ▶ There are COVID-induced requirements and attitudes that need to be taken into account when targeting the German market 2021/2022
- ▶ Mixed outlook for the U.S. (short-term and mid-term): Strong desire to travel, to experience freedom, see the world VS. doubts about long-haul travel – so strong communication is needed to stay a “dream destination” of the Germans



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