


HOLIDAY PLANNING AND BOOKING – GERMANY – 2022

Financial uncertainty largely elicits bookings at short notice. Travel brands can entice early bookings via flexible booking options and promote cheaper alternatives to travel (eg camping).



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Holiday Planning And Booking - Germany - 2022

This report looks at the following areas:

- The short-, medium- and long-term impact of inflation on the domestic and international holiday market
- Holiday intentions, future holiday destinations, holiday types and duration of holiday
- Booking method and most important factors for holiday planning
- Impact of COVID-19 and inflation as well as sustainability on holiday booking behaviour
- Launch activity and marketing strategies for travel brands
- Market shares covering most popular domestic and international destinations
- Market size covering consumer spend and number of trips



Financial uncertainty largely elicits bookings at short notice. Travel brands can entice early bookings via flexible booking options and promote cheaper alternatives to travel (eg camping).

Overview

While **87% of Germans** consider the environmental impact in their decision making at least sometimes, only **36% of travellers prefer to book with tour operators that look to protect the environment**. To address this 'say-do gap', travel brands should provide information about the **environmental impact of holidays** to help consumers to make sustainability-driven decisions.

The growing number of financially unhealthy Germans, caused by **inflation, is threatening the travel sector**. As **51% of Germans** rate cost as one of the top three factors for holiday

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planning, **promoting cheaper holidays** – for example short camping trips as an alternative to hotels – is a chance for brands to **keep financially tight consumers engaged**.

Germans **under 35 seem to be more price resilient** (35%) compared to consumers aged 35 and older (20%). Operators should address this experience-hungry group as they are more likely to travel in the upcoming months (24%) compared to Germans aged 35+ (16%). Travel offers in **Europe and sustainable options** will highly resonate among them.

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Report Content



EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for international and domestic holidays

Market context

- High prices and inflation will slow down recovery of the tourism industry
- COVID-19 acted as a catalyst for 'new work'
- Sustainability as a top priority for the tourism industry

Mintel predicts

- Market size & forecast
- Slower bounce back to pre-COVID-19 value due to rising prices
- Recovery of market volume slower than value recovery

Opportunities

- Focus on more price-resilient consumers under 35 with holidaying abroad
- Address different income brackets
- Use flexible booking options and postpone payment to encourage more early bookings
- Implementing sustainability is key for start-ups
- Quick download resources

MARKET DRIVERS

The German economy

- Strong post-COVID-19 bounceback followed by a period of slower growth
 - Graph 1: key economic data, in real terms, 2019-23
- Economic slowdown fueled by conflict in Ukraine
- Inflation is the key concern in 2022 for consumers, brands and the economy...
- ...impacting financial wellbeing and consumer expenditure

The impact of the economy on the holiday market

- Going on holiday becomes more expensive
- Strong perception of price increases...
 - Graph 2: household and lifestyle issues faced in the last two months, 2022
- ...leads to changes in holiday behaviour

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- Graph 3: expected changes in behaviour due to rising prices, 2022
- Pent-up demand for travel collides with labor shortage at airports and hotels
- 9-Euro Ticket triggers train hype

Sustainability

- Environmental impact plays important role in the decision-making process
- Sustainability as a top priority
- Sustainability of the tourism industry is more closely scrutinised

Localism

- Local culture and products as a selling point

Experience economy

- Experiences everywhere

Hybrid Working

- COVID-19 changed the working environment for good

WHAT CONSUMERS WANT AND WHY

Holiday Planning and Destination

- Germans desire holidays...
- ...but the negative development of financial wellbeing will limit ability to travel
- Germans are keen to explore Europe
 - Graph 4: main holiday destination in the next 12 months, by generation, 2022
- Tap into more diverse parts of holidaying in Germany
- Push innovative ideas to make holidaying in Germany more appealing
- Younger generations are driving holiday participation
- Promote destinations in Europe for Gen Z
 - Graph 5: main holiday destination in the next 12 months, NET, 2022
- Broaden your social media activities
 - Graph 6: social media platforms used at least once a week, by generation, 2021
- Tap into the breadth of platforms used by Gen Z

Type of Holiday

- Growing demand for beach resort holidays
 - Graph 7: main holiday type taken in the past 12 months, 2020
 - Graph 8: main holiday type in the next 12 months, 2022
- Promote rural holidays in Germany to price-conscious consumers
- Promote camping as a cheaper and more sustainable alternative

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- Make holidaying extra special

Duration of stay

- Address Gen Z with more frequent holidays and Baby Boomers with longer stays
 - Graph 9: main holiday duration in the next 12 months, 2022
- Combine different types of holidaying
- Capitalise on workations to extend the length of stays
- Remote year supports travelling workers with various workation programs

Holiday booking method

- Prepare for last-minute bookings
- Increase booking numbers via better smartphone usability
 - Graph 10: booking method for the main holiday in the next 12 months, 2022
- Focus on more complex holidays for in-store offers
- Travel agencies should keep an eye on new technologies to ease bookings

Factors for holiday planning

- Destination as a key factor
- Destination, destination, destination
- Find alternative search options for holiday bookings
 - Graph 11: important factors for holiday planning, by destination as a factor for holiday planning, 2022

Behaviours towards holiday planning and booking

- Watch out for COVID-19 and sustainable holidays
 - Graph 12: behaviours towards holiday planning and booking, 2022
- Counteract uncertainty...
- ...with flexible booking and payment options
- Eurowings offers flexible rebooking
- Fill the 'say-do gap' in relation to sustainability
- Work on the image of sustainable travel
- Use local offers to meet social sustainability

LAUNCH ACTIVITY AND INNOVATION

- Booking.com taps into flight market and rental cars
- New generation of ÖBB Nightjet will be launched in 2023
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- Technology: Lilium aims to revolutionise regional mobility through air taxis
- New technologies will speed up booking processes in the future
- Airbnb's summer release will make the platform more user-friendly

Advertising and marketing activity

- TUI focuses on last minute offers...
- Airbnb stresses authentic experiences
- Authenticity is a top priority in Swiss tourism
- UEFA Women's EURO 2022 sponsorship campaign with Booking.com

MARKET SHARE

- Southern European warm-weather destinations regain market share
 - Graph 13: most popular holiday destinations abroad, by volume share of longer trips, 2019-21*
- German destinations need to show their diversity to keep up with international competition
 - Graph 14: most popular domestic holiday destinations, by volume share of longer trips, 2019-21

MARKET SIZE, SEGMENTATION AND FORECAST

- Travel spending decreased further in 2021
- Volume on the road to recovery
- Average spend for holidaying reaches record low in 2021
- Increase in volume mainly driven by short domestic trips
- Slower bounce back to pre-COVID-19 value due to rising prices
- Recovery of market volume slower than value recovery
- Pent-up demand for travel spurred growth in the first half of the year...
- ...but the travel industry has to cope with great burdens in the short-term
- Focus on the main holiday in the medium-term
- Positive outlook for the long term

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

Appendix – market size and central forecast methodology

- Forecast methodology
- Forecast methodology – fan chart
- Market size and forecast – value
- Market size and forecast – volume
- Market forecast and prediction intervals – value
- Market forecast and prediction intervals – volume

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