

# HOLIDAY REVIEW – GERMANY – 2021

Germans' desire to travel remains strong, but the recent shake-up of the travel market left them looking for advice, allowing brands to prove themselves as valuable experts.



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# Report Content

## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview

### The impact of COVID-19 on holidays

- Ongoing travel disruptions fostering demand for international travel
- COVID-19's impact on the travel market and German consumer behaviour

### Market context

- COVID-19 substantially limiting travel opportunities
- Consumers' financial confidence on the rise despite economic impact of COVID-19
- Take environmental action further by reducing emission at the source

### Mintel predicts

- After an unprecedented drop in value, market set to recover in the medium-term
- Long-term outlook for market volume remains positive
- Market size & forecast following the COVID-19 outbreak

### Opportunities

- Focus on young, travel-hungry consumers to help abroad destinations recover
- Promote beach holidays as a way to relax and reconnect
- Use new technologies to provide immersive holiday experiences
- Offer in-person expert advice to Millennials
- Quick download resources

## MARKET DRIVERS

### COVID-19

- COVID-19: market context
- The impact of COVID-19 on the German economy
  - Graph 1: key economic data, in real terms, 2019-22
- The impact of the economy on the market

### Travel restrictions

- Travel market massively disrupted due to governmental restrictions

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## Financial wellbeing

- Financial health to predict holiday behaviour
  - Graph 2: holiday booking plans and intentions for 2021, by financial situation, 2021
- Consumers' financial confidence on the rise
- Price increases to challenge holiday intentions

## Ageing population

- Growing share of seniors to reshape travel market
  - Graph 3: projected share of adult population, by age group, 2020-30

## Sustainability

- Embrace responsibility to take action against high carbon emissions
  - Graph 4: greenhouse gas emissions, 2010-20
- Go beyond carbon offsetting

## WHAT CONSUMERS WANT AND WHY

### The impact of COVID-19 on consumer behaviour

- Lifestyle concerns and exposure anxiety newly on the rise
  - Graph 5: Mintel's COVID-19 lifestyle concern and exposure anxiety index, 2 March 2020-18 November 2021
- Fading exposure concerns increase comfort levels while traveling
- Rising travel intentions still vulnerable
  - Graph 6: holiday booking plans and intentions for 2021, 2021

### Holiday destinations

- Pandemic-induced preference for destinations close to home
- Germany: capitalise on your strengths
- Unbroken wanderlust
- Demand for international destinations on the rise
  - Graph 7: participation and future holidaying intentions, by holiday destination, 2021
- Young consumers keen to go abroad
  - Graph 8: intended travel destinations over the next 12 months – NET, by age group, 2021
- Address the undecided traveller
- Encourage bookings with early bird discounts
  - Graph 9: intended travel destinations over the next 12 months, by net monthly household income, 2021

### Holiday types

- Fulfil younger Germans appetite for travel with city breaks
  - Graph 10: types of holidays taken or planned between October 2020 and September 2022 – NET, 2021

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- Beach holidays set to regain their popularity
  - Graph 11: participation and future holidaying intentions, by holiday type, 2021
- Promote beach holidays as a way to relax and reconnect
- Less-crowded cities face great post-pandemic opportunities
- Use a blended approach for wellness and nature holidays

## Holiday motivations

- Two in three German travellers looking for relaxation
  - Graph 12: motivations to travel in the next 12 months, 2021
- Promote holidays for emotional wellbeing
- Parents likely to spend more on upcoming holidays

## Holiday booking behaviour

- Late booking behaviour to prevail
- Independent holiday providers can leverage on the flexibility provided
  - Graph 13: booking method used for upcoming main holiday, 2021
- Promote independent holidays through customer referrals
  - Graph 14: intended booking method for the upcoming main holiday, 2021
- Reassure travellers about safety on trains

## Purchase drivers for holiday bookings

- Value for money and financial security drive holiday bookings
  - Graph 15: purchase drivers for main holiday bookings at travel companies, NET, 2021
- Promote off-peak holidays for price-conscious seniors
- Germans unwilling to renounce security for flexibility
- Target young consumers with flexible, customisable experiences

## Holidaying behaviours

- Online videos serve as a source of inspiration for travellers
  - Graph 16: holidaying behaviours, 2021
- Expand on online inspiration with virtual reality
- In-person expert advice highly valued by Millennials
- Highlight the difference a single journey can make to encourage eco-friendly travel
- Promote sustainable travel as an attribute
- International travellers more likely to engage with eco-friendly travel

## LAUNCH ACTIVITY AND INNOVATION

- Lufthansa Group is tackling food waste on flights
- Atmosfair celebrates technological advance towards carbon neutral air traffic

## Advertising and marketing activity

- TUI highlighting new travel opportunities
- Lufthansa celebrating travel as a way to reconnect
- Deutsche Bahn claiming to facilitate sustainable travel easily

## MARKET SHARE

- Spain remains most popular holiday destination abroad despite great loss
  - Graph 17: most popular holiday destinations abroad, by volume share of long trips, 2018-20
- Italy has potential to regain market share through hybrid holidays
- Bavaria substantially increases market share
  - Graph 18: most popular domestic holiday destinations, by volume share of long trips, 2018-20
- Older generations to uphold domestic tourism
- Domestic destinations become more popular for short trips
  - Graph 19: most popular holiday destinations abroad, by volume share of short trips, 2018-20
  - Graph 20: most popular domestic holiday destinations, by volume share of short trips, 2018-20
- Increase market share gains of domestic destinations by promoting cultural differences in Germany

## MARKET SIZE, SEGMENTATION AND FORECAST

- Pandemic-related disruptions send the travel market into a crisis
- Unprecedented reduction in the number of trips undertaken by Germans in 2020
- Vast value decline threatened the tourism industry
- Travel market reaching record low in 2020 following years of growth
- Growing appreciation of local tourism
- Unprecedented drop in travel volumes slightly upheld by long domestic trips
- After an unprecedented drop in value, market set to recover in the medium-term
- Long-term outlook for market volume remains positive
- Market conditions remain challenging in the short-term
- Longer holidays abroad bound to recover
- First signs of recovery in the medium term
- Potential for growth long term

## APPENDIX

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

- Products covered in this Report
- Abbreviations

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- Consumer research methodology
- CHAID analysis methodology
- CHAID analysis
- A note on language

### **Appendix – market size and 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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