

Reiseanalyse 2022

Travel developments & trends



RTL Data

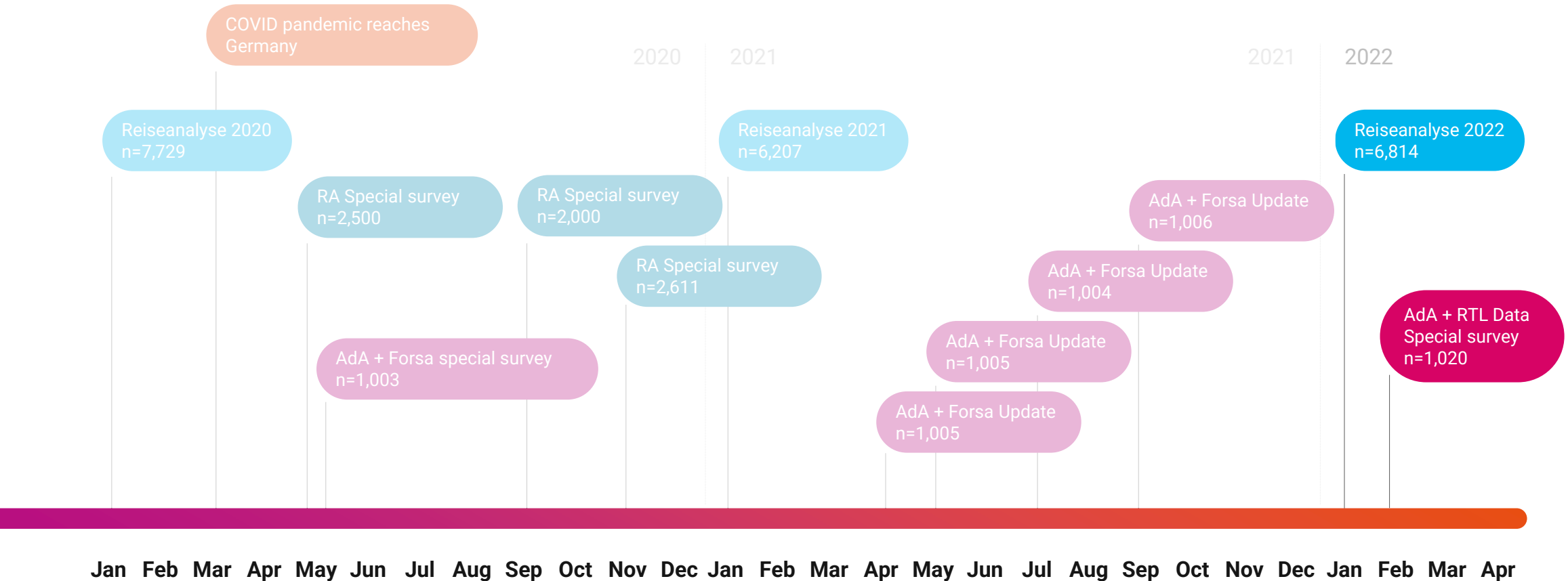
Hamburg/Cologne, May 2022

Ad Alliance / RTL Data

Study Profile Reiseanalyse 2022

Population	70.5 million German speakers aged 14 and over in private households in Germany
Net sample	6,814 persons of the population
Selection procedure	Random route
Data collection	Face-to-face interviewing. Card games, lists and maps are available to the trained interviewers as interview aids.
Implementing institutes	Ipsos GmbH, Hamburg N.I.T. Institute for Tourism and Spa Research in Northern Europe GmbH
Interview length	Average 53 minutes
Survey period	20 December 2021 until 5 February 2022
Weighting / data preparation	Weighting: Adjustment of the demographic structure (redressement) as well as the probabilities of use to the target values of the AWA 21. ISBA, Hamburg G+J GmbH & Co KG, Hamburg

Study overview on travel behaviour in Germany

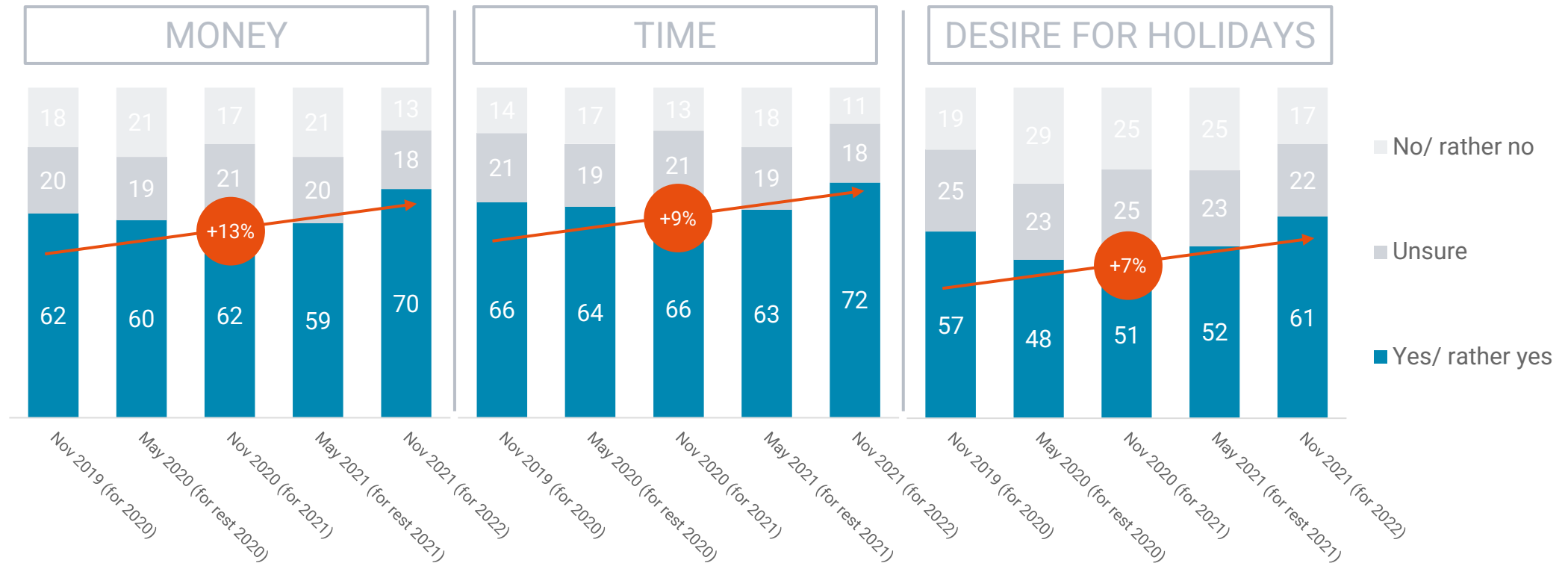


Travel developments & trends



The feasibility of holiday travel in terms of money and time reaches a new high in 2022, as does the desire for holiday travel

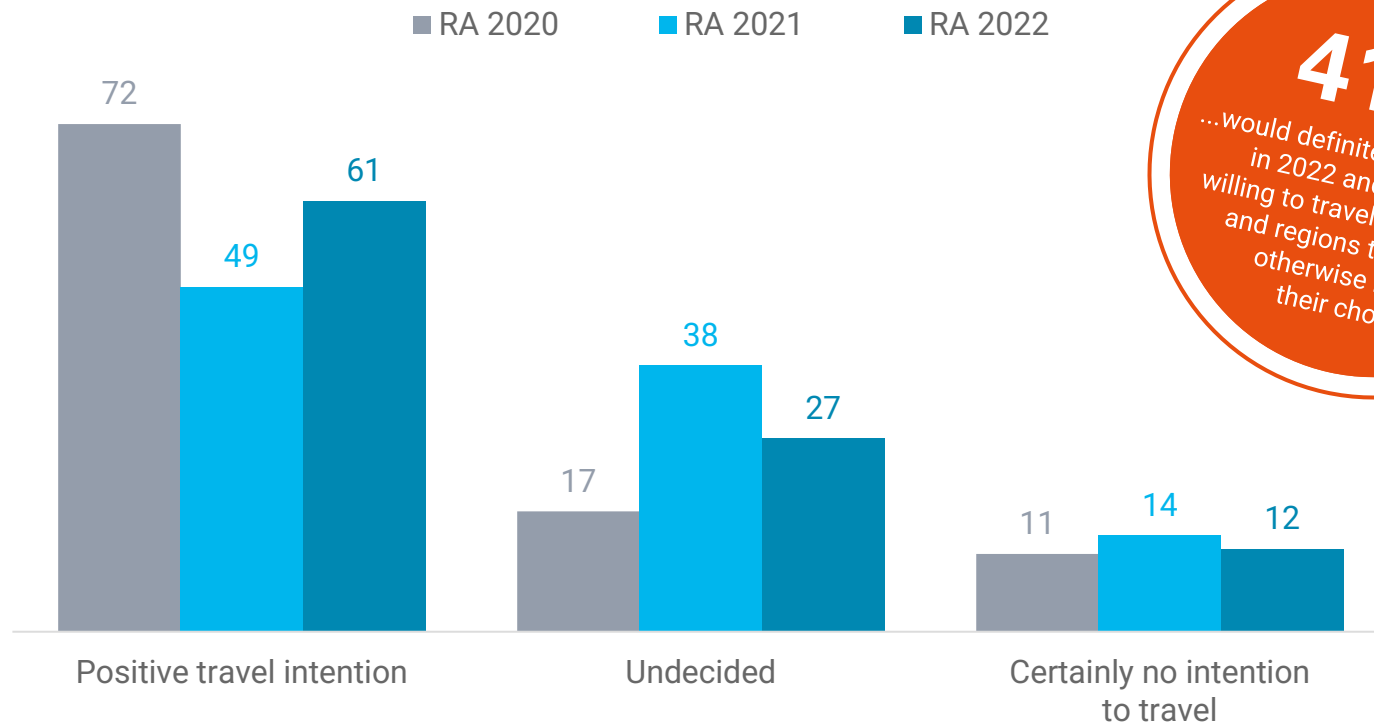
The main holiday trip - Basis: Total (in %)



Source: Reiseanalyse (2019-2022) | Basis: German-speaking population aged 14 and over in Germany (70.5 million) | Figures in % | Question: What about (...) your holiday plans? You see statements here about holiday trips (...)?

Travel intentions are clearly on the rise again

Travel intention - Basis: Total (in %)



41%

...would definitely like to travel in 2022 and are also willing to travel to countries and regions that would otherwise not be their choice

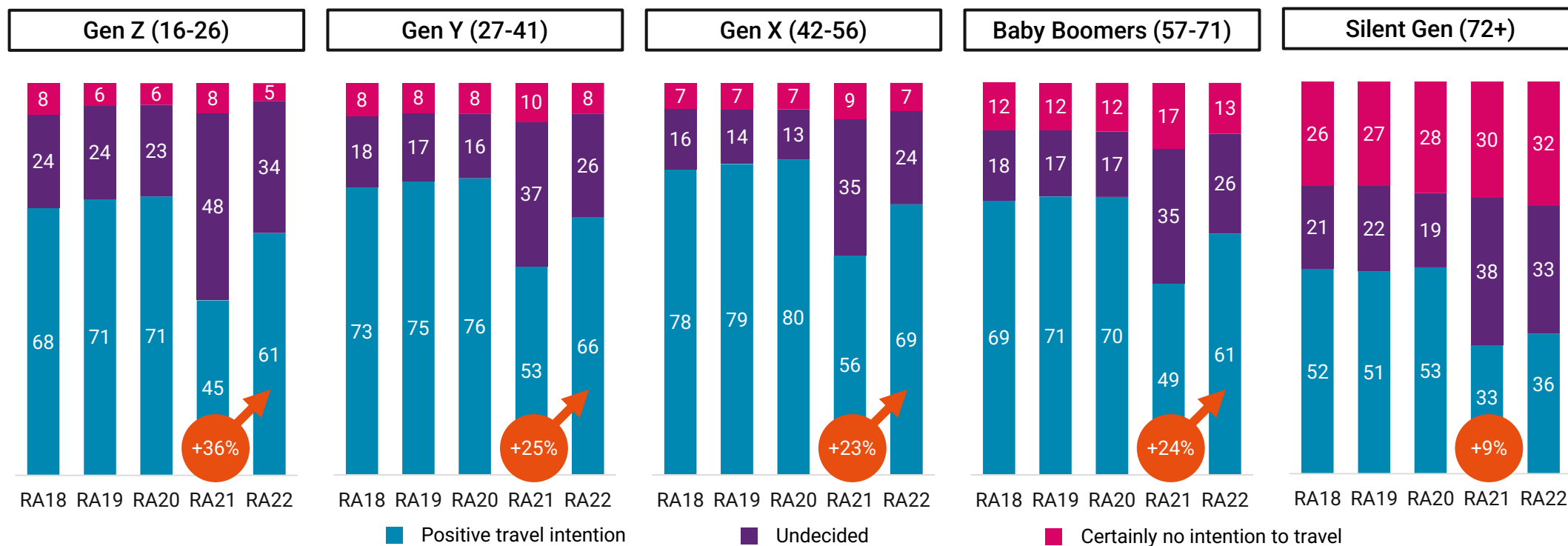
46%

...currently have a significantly **higher need for information** compared to "normal" years

Source: Reiseanalyse (2020-2022) | Basis: German-speaking population aged 14 and over in Germany (70.5 million) | Figures in % | Question: Do you already have holiday plans for 2022? Which of this list applies to you?

All age groups are clearly on the rise

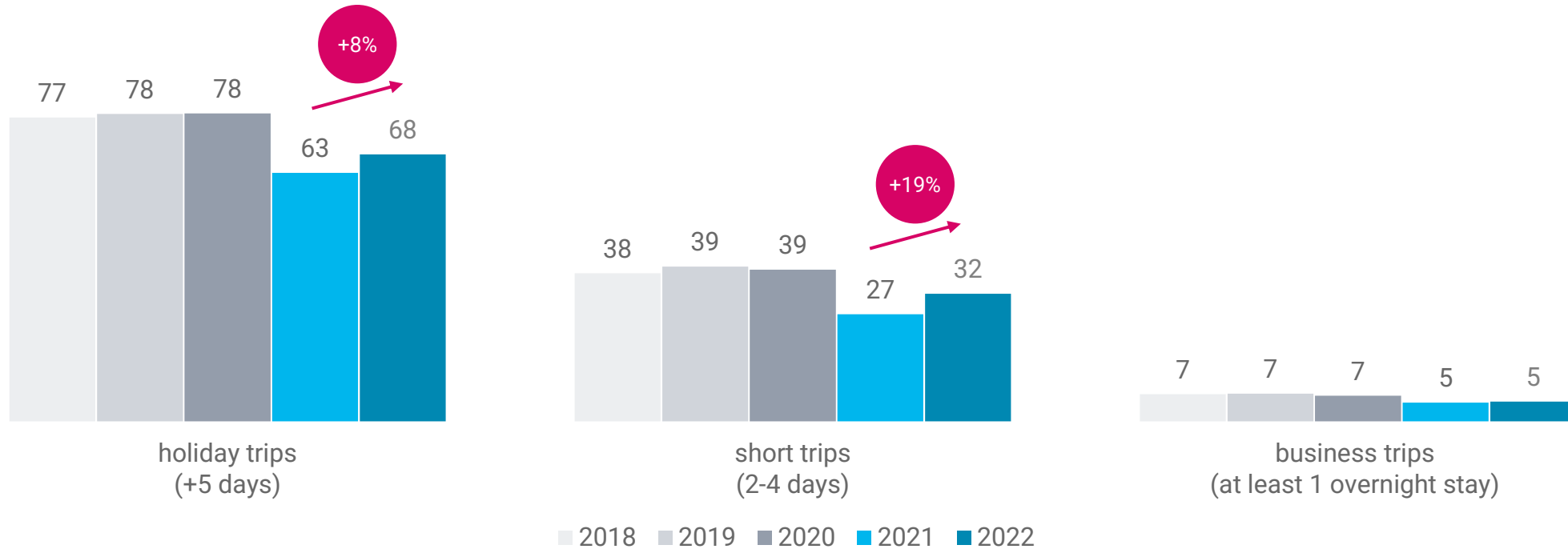
Travel intention by generation over time - Basis: Total (in %)



Source: Reiseanalyse (2018-2022) | Basis: German-speaking population aged 14 and over in Germany (70.5 million) | Sample size RA 2022: Gen Z (16-26 years), n=646, Gen Y (27-41 years), n=1,562, Gen X (42-56 years), n=1,813, Baby Boomers (57-71 years), n=1,850, Silent Gen (72 years and older), n=872 | Figures in % | Question: Do you already have holiday plans for 2022? Which of this list applies to you?

Travel volume is increasing again

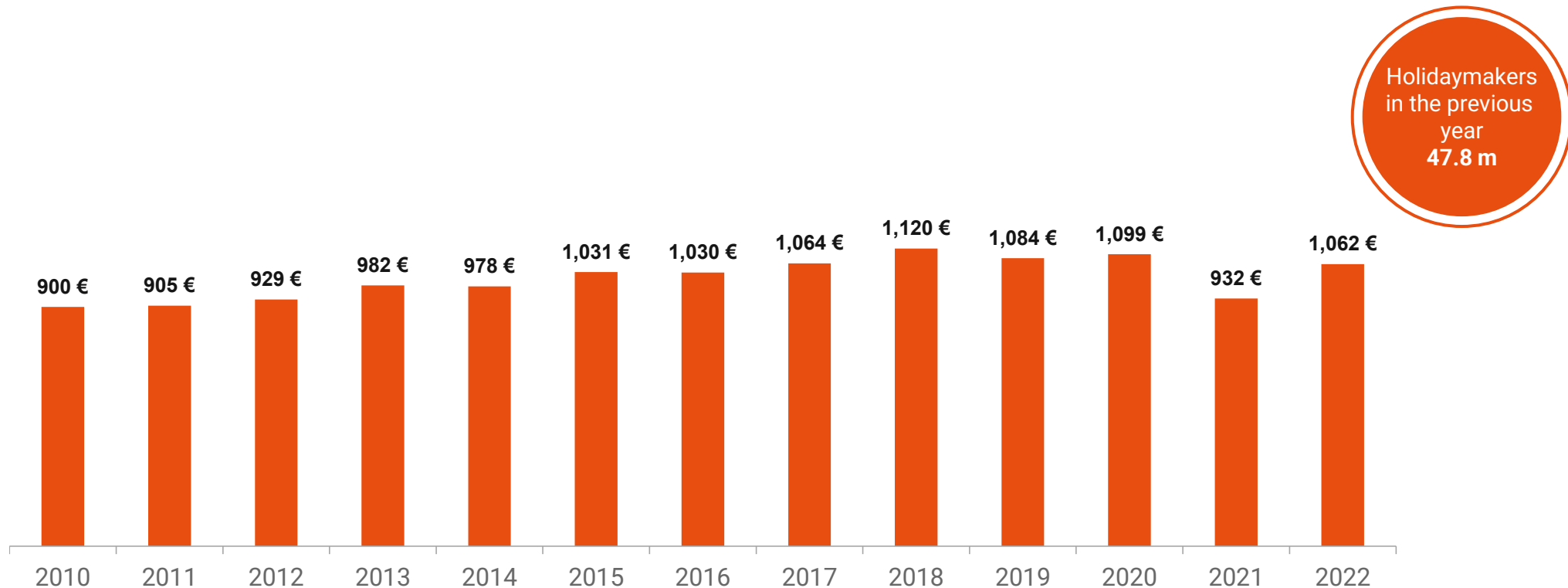
Development of travel behaviour - Basis: Total (in %)



Source: Reiseanalyse (2018-2022) | Basis: German-speaking population aged 14 and over in Germany (70.5 million) | Figures in % | Question: Have you made the following types of travel in the past year?

In 2021 travellers spent an average of €1,062 per person and trip, which was more compared to the previous year

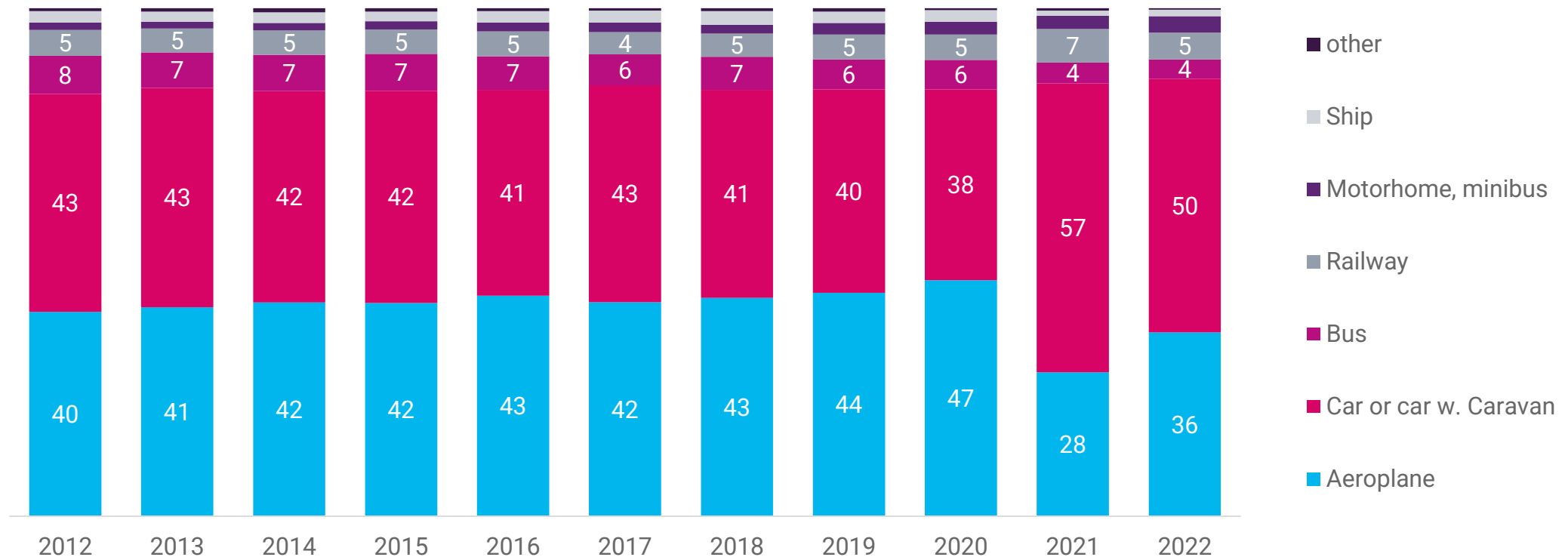
Expenditure of the main holiday trip in annual comparison - Basis: Travellers in the previous year (in €)



Source: Reiseanalyse (2010-2022) | Basis: German-speaking population aged 14 and over in Germany, travellers in the previous year (47.8 million) | Figures in €
Travel expenditure per person for the main holiday trip in the previous year

The share of air travel is recovering visibly with +29% compared to the previous year

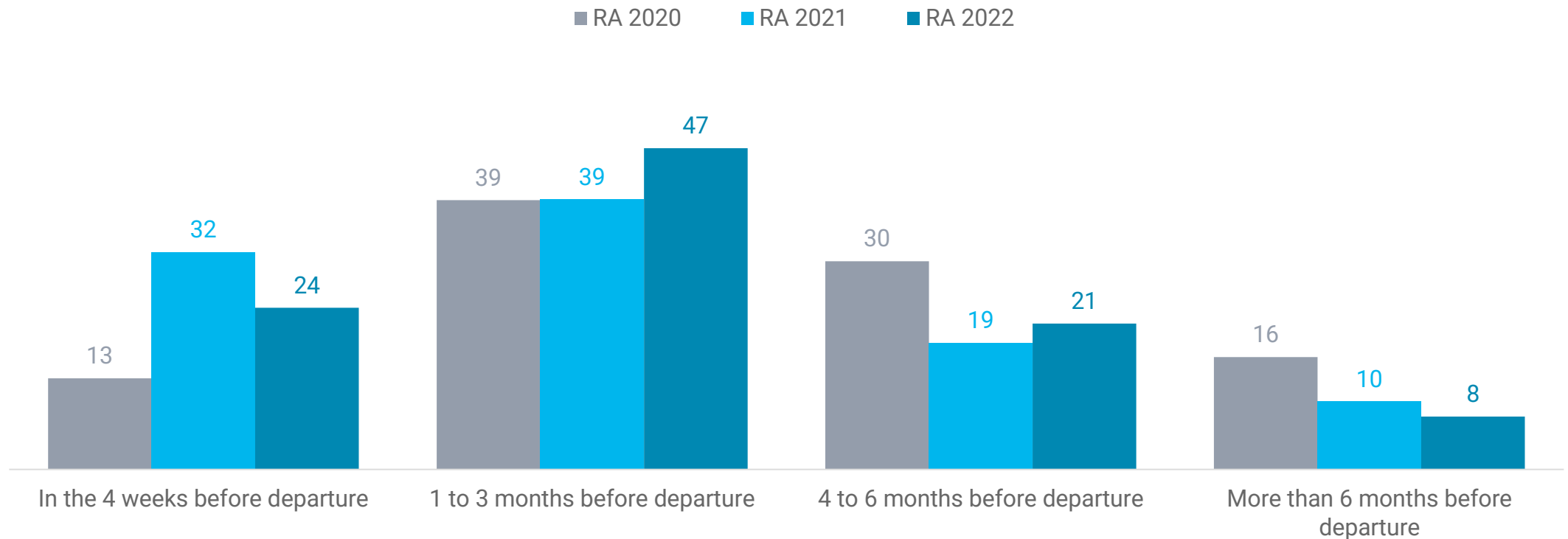
Means of transport used for holiday travel - Basis: Travellers in the previous year (in %)



Source: Reiseanalyse (2012-2022) | Basis: German-speaking population aged 14 and over in Germany, travellers in the previous year (47.8 million) | Figures in % | Question: Which means of transport did you use for your holiday trip? Name the one with which you travelled the furthest distance.

As a result of the COVID pandemic, holiday decisions were made at much shorter notice, the effect is reduced again somewhat this year

Time of decision for the main holiday trip - Basis: Travellers in the previous year (in %)



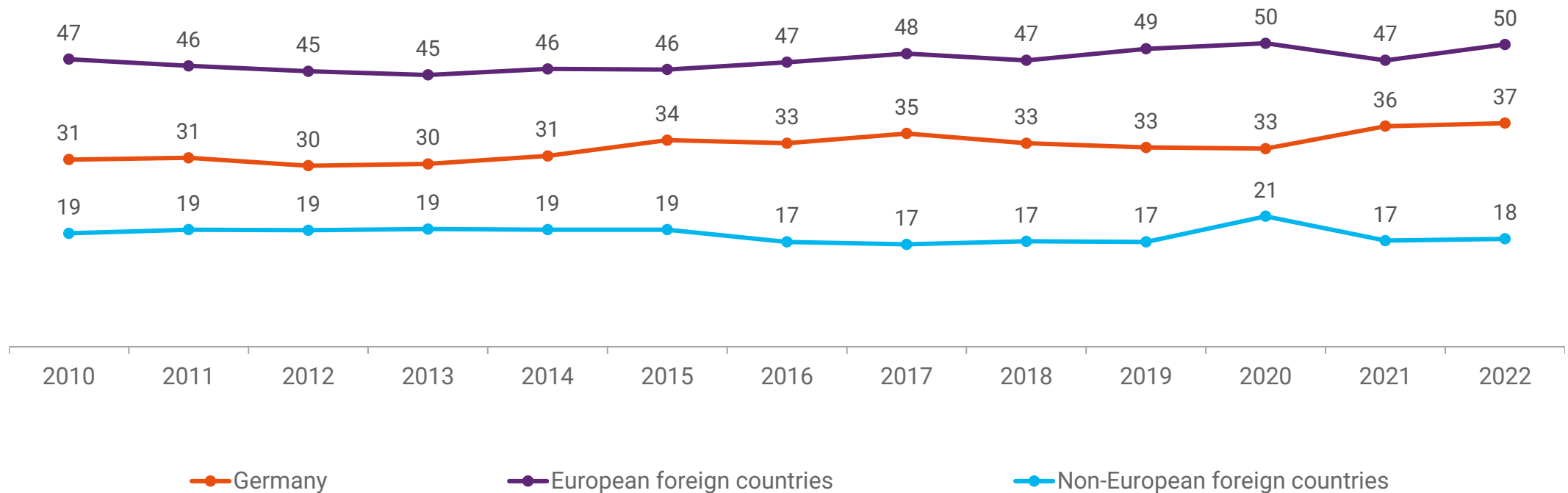
Source: Reiseanalyse (2020-2022) | Basis: German-speaking population aged 14 and over in Germany, travellers in the previous year (47.8 million) | Figures in % |
Question: When did you decide on this trip or on the most important components of this trip?

Travel developments & trends

Deep dive: Destinations

Travel plans for the next 3 years show an overall stable development - European countries increase by 3 percentage points

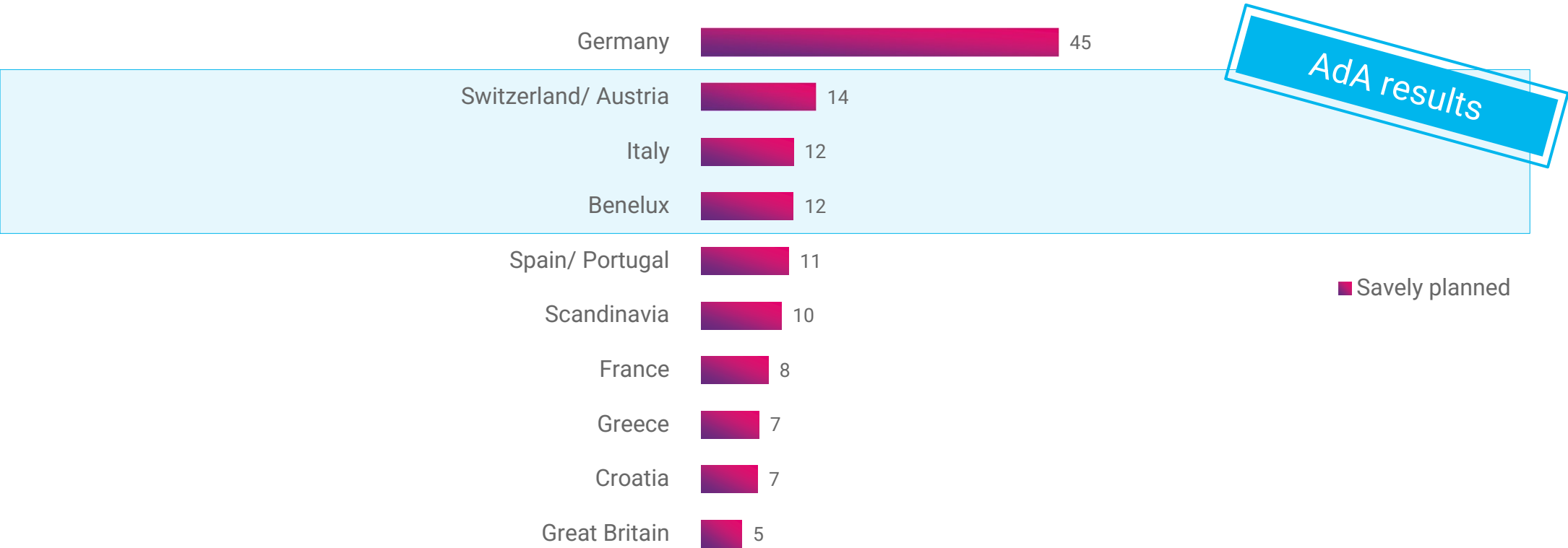
Certainly planned travel destinations in the next 3 years - Basis: Total (in %)



Source: Reiseanalyse (2010-2022) | Basis: German-speaking population aged 14 and over in Germany (70.5 million) | Figures in % | Question: Are you fairly certain to plan a holiday trip to one or more of these countries and regions within the next 3 years (i.e. 2022, 2023 or 2024)?

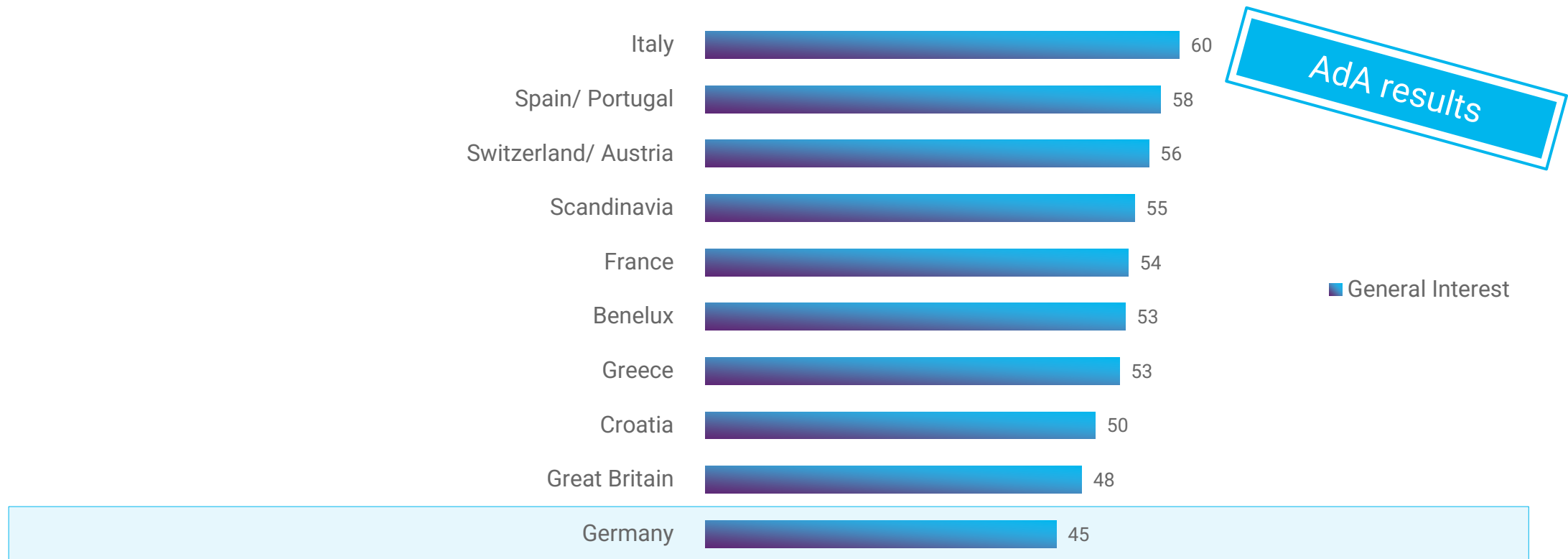
In the next 12 months, Austria/Switzerland, Italy and Benelux are popular European destinations

Top 10 destinations n. 12 m. within Europe (in %)



Although planning for Germany is high, interest in other destinations in Europe is consistently higher

Top 10 destinations n. 12 m. within Europe (in %)



Source: Ad Alliance | RTL Data "Travelling in COVID Times" (2022) | Basis: People with at least uncertain travel intentions, n=903 | Figures in % | Question: And which of these countries and regions would you generally consider as a holiday destination in the next 12 months?

**01**

Travel in the previous year

After the decline in 2020, the number of trips visibly increased again in the second pandemic year (holiday trips: +8%, short trips: +19%). The holiday feeling and satisfaction with the holiday are once again extremely positive despite COVID.

02

Destinations

The share of trips abroad has risen again slightly (+7 million), but is still below the pre-COVID level. Travel plans for the next 3 years show an overall stable development, with European travel abroad increasing again by 3 percentage points.

03

Travel intention

61% want to go on a trip in 2022 (+24% compared to the previous year). Both the financial feasibility (70%) and the time feasibility (72%) are currently rated as good as never before by the respondents. The desire to go on holiday also reached a new high of 61%. This suggests a certain pent-up demand.

04

Travel Booking & Communication

The short-term nature of holiday decisions is declining again somewhat and shifting more towards the period 1-3 months before departure. The money-back guarantee continues to be the most important booking criterion. In addition, aspects such as the accessibility of the tour operator, comprehensive information and good support are important, especially for respondents with an uncertain travel intention. 46% state that they currently have a significantly higher need for information.

Conclusion



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