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# Travel Trade Scan Germany 2023



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Netherlands Board  
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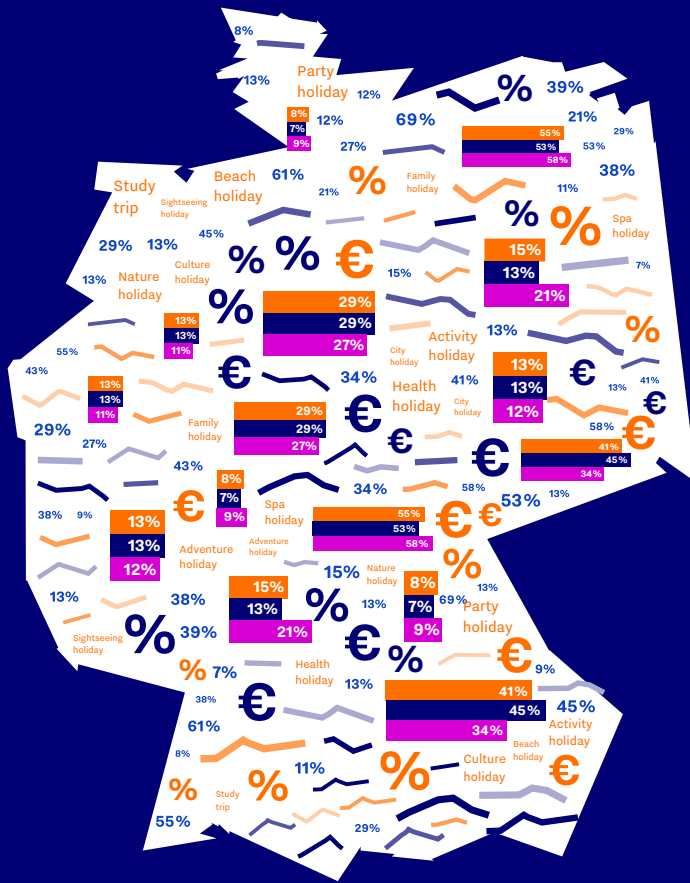
# Travel Trade Scan Germany

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# The German travel market at a glance



## Market data & development

The ‘world champions in travel’ are unstoppable. No pandemic, financial and economic crises or even military conflict and natural disasters can dampen the Germans’ appetite for travel. Despite recent turbulent times, holidays remain at the top of their priority list.

In 2022, the overall German travel market had not yet returned to pre-corona levels. However, clear signs of a strong recovery appeared with German holidaymakers taking a total of 143.9 million trips that year. This is just 12% less compared to 2019. Of these trips, 47% lasted longer than 5 days and 53% were short trips of 2 to 4 days.

The travel industry turnover amounted to €58.6 billion in 2022. This corresponds to about 3% of the total private consumption of German citizens. About 44% of the turnover was booked by tour operators and travel agencies (organized travel). The remaining 56% was booked by service providers and product portals (individual travel). After the big dip during the pandemic, in 2020 and 2021, the turnover increased by 103% in 2022 compared to 2021.

Travel agencies were hit hardest by the pandemic. The total travel agency turnover in 2022 was still 38% below 2019 levels, whereas the decrease in turnover for the approximately 2,300 tour operators was much smaller at 26%.

The long-term trend towards a steadily increasing number of trips that started prior to 2019 is expected to bounce back from 2023 onwards, short- and medium-haul destinations benefiting stronger than long-haul destinations. There is a good chance that the number of short trips will be almost 10% higher in 2023 than in 2019. This is largely due to the growing group of travellers of over 60’s as well as the upcoming younger generation GenZ.



## Trends & booking behaviour

The booking behaviour of consumers is undergoing a permanent change. Since 2010, online bookings have been steadily increasing year on year. This shift can be attributed to the emergence of Online Travel Agencies (OTAs) as major players in the travel industry, alongside traditional travel providers enhancing their strategies and introducing their own online platforms. This trend has been further strengthened by the pandemic.

In 2022, a total of 56% of all holidays lasting more than five days were booked digitally. For short breaks, the digital share is even higher at 79%. The choice of booking channel for travelers depends on two key factors: the complexity of the trip and the destination. For less intricate travel plans and nearby destinations, the need for a personal travel consultant's expertise is notably reduced. Additionally, consumers have become increasingly tech-savvy, adapting to an omnichannel approach for travel research and reservations. They seamlessly transition between various channels, seeking information online on OTA platforms or review sites, consulting travel agencies for advice, or communicating by phone and email communication. Their ultimate booking choice might involve an entirely different channel.

### Scale and expenditures

Prior to the pandemic, a discernible trend was already underway toward market dominance through scale. Presently, the ten largest tour operators in the D-A-CH region (Deutschland (Germany), Austria, Confoederatio Helvetica (Switzerland)) collectively command an approximate 75% share of the total turnover. Nevertheless, numerous companies managed to weather the pandemic by securing assistance from either governmental sources or through cross-financing mechanisms. With the market's robust resurgence, a significant portion of state subsidies has been successfully reimbursed. The increased willingness of Germans to spend money on their holidays has resulted in a higher circulation of funds than before the pandemic. While the average expenditure stood at €1,032 per year in 2019, it surged to €1,194 in 2022, culminating in a grand total of €80.1 billion per person. This is a notable increase from the €73.1 billion recorded in 2019.

### Change in focus

The impact of the pandemic on small specialist operators varied significantly. Certain operators were compelled to completely overhaul their product offerings, while others reaped the rewards of the shift towards preferences for earthbound travel, including activities like walking and cycling holidays amidst natural settings. Nonetheless, across all segments, a common challenge arises in the form of staff shortages and the imperative for accelerated digitalization.

### Beach and nature

Extended holidays (5 days) in Germany predominantly revolve around beach and nature getaways, often enjoyed with family members. Mediterranean nations, particularly Spain, hold a steadfast appeal. Within this category, package tours continue to enjoy popularity, frequently arranged through prominent FITs (Free Independent Travelers – individual travel providers).

The camping and caravanning sector has undergone a significant surge, emerging as a clear winner from the pandemic, particularly when paired with nature-based activities like hiking and cycling holidays. Active getaways are also gaining traction, particularly among the younger demographic. Additionally, city and cultural excursions are noteworthy, often arranged individually through online travel agencies (OTAs). The cruise industry experienced substantial setbacks amid the pandemic; nevertheless, it is currently experiencing a swift resurgence.

## German visitors and the Netherlands

Germans constitute the largest group of international tourists in the Netherlands by a significant margin. In 2019, just before the pandemic struck, a record-breaking figure of nearly 6.2 million German visitors was recorded, contributing to a total of 22 million registered overnight stays. After the pandemic, the year 2022 saw the return of 5.9 million German guests in the Netherlands, once again contributing to a total of 22 million overnight stays.

### Favourite destinations

Regarding getaway destinations abroad, the Netherlands secured the second spot in 2022, after Austria. When it comes to holidays longer than 5 days, the Netherlands shares 8th position with Poland, closely trailing France. Besides the well-frequented coastal regions of Zeeland, North Holland (including Amsterdam), and South Holland (including The Hague and Rotterdam), the provinces of Flevoland, Utrecht, and North Brabant have also experienced increased visitation, surpassing even the overnight stay figures achieved during the record year of 2019.

### Visitor profiles and preferences

The majority of German visitors to the Netherlands are families (both with and without children), followed by small groups of friends. The primary motivations for German travelers to visit the Netherlands are relaxation and quality time spent together.

Accommodation-wise, holiday homes are the preferred choice for over 45% of all overnight stays. Notably, the most substantial increase, accounting for over 460,000 additional overnight stays, occurred within the camping sector in 2022. This robust growth emphasizes the Netherlands' advantage in capitalizing on the thriving demand among German travelers for camping and caravanning holidays.



## German booking behaviour

The Netherlands is the most digitally booked destination from Germany. In 2022, digital bookings (including email inquiries) accounted for 88% of all bookings from Germany.

The number of Germans who spontaneously travel to the Netherlands is exceptionally high. Market research by NBTC from 2022 shows that 7 and 8 % of visitors from Lower Saxony and North Rhine Westphalia (NRW) respectively indicate that they have booked accommodation less than 24 hours before departure. When it comes to last minute bookings (up to 2 weeks before departure), NRW accounts for 49% of all German visitors to our country. Even of visitors from Baden-Württemberg and Bavaria, 34% book the trip in the two weeks prior to the departure date.

Approximately 50% of accommodation reservations in the Netherlands made by German travelers are direct bookings with the accommodation provider. Following this, 35% of bookings are made through OTAs, while 13% are facilitated by tour operators or travel agencies. The proportion of this latter segment exhibits notable disparities based on the region. For instance, only 9% of bookings from Rhineland-Palatinate are processed through tour operators or travel agencies. Conversely, in Baden-Württemberg and Bavaria, this share increases to 20% and 21% respectively.



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Projektmanager Travel Trade

# 2

## The German travel trade market at a glance

A brief overview of the German travel industry including the main players, distinctive trends and developments and its recovery post pandemic.



## 2.1 General market development & demand

This market analysis encompasses two phases of market development: the pre-COVID-19 year 2019 and the subsequent developments from 2022.

We categorize the German tourism market into three primary segments:

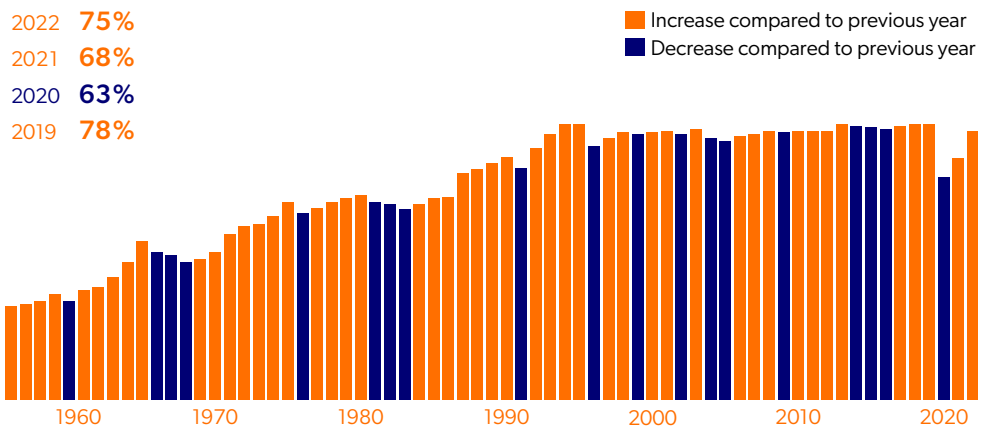
- Service providers, encompassing hotels, airlines, railways, car rental companies, and long-distance coaches.
- Travel agencies and tour operators, further divided into Free Independent Travelers (FIT), package tour operators, and group tour operators.
- Online Travel Agencies (OTAs), functioning as intermediaries or acting directly as travel service providers.

This year's report provides an overview of the German travel landscape in general and places a specific focus on travel from Germany to the Netherlands. Additionally, we introduce three trending subjects: digitalization, sustainability, and the holiday homes and camping segment.

By examining the evolution of the overall travel volume over the past six decades, it becomes evident why Germans are often recognized as the 'world champions of travel'.

### Leisure travel intensity 1954 till 2022

Chart 1



Leisure travel intensity, i.e. the proportion of people in the population who have taken at least one holiday trip, increased by 8 percentage points from 2021 to 2022 to just under 75%, 3% below the figure for 2019, the last year of travel before the start of the Corona pandemic.

Basis: German-speaking population 14+ years, until 1990 only old federal states, from 2010: incl. German-speaking foreigners

Source: Travel analysis 1970 to 2023, FUR 1954, Various studies

In 2022, a collective number of nearly 53 million Germans embarked on approximately 67 million extended holidays (>5 days), alongside nearly 77 million short getaways (2-4 days). Pre-arranged travel expenditures totaled nearly €59 billion, allocated across the aforementioned categories as follows:

44% (€25.9 billion)

› Tour operators/Travel agencies (Organised tours).

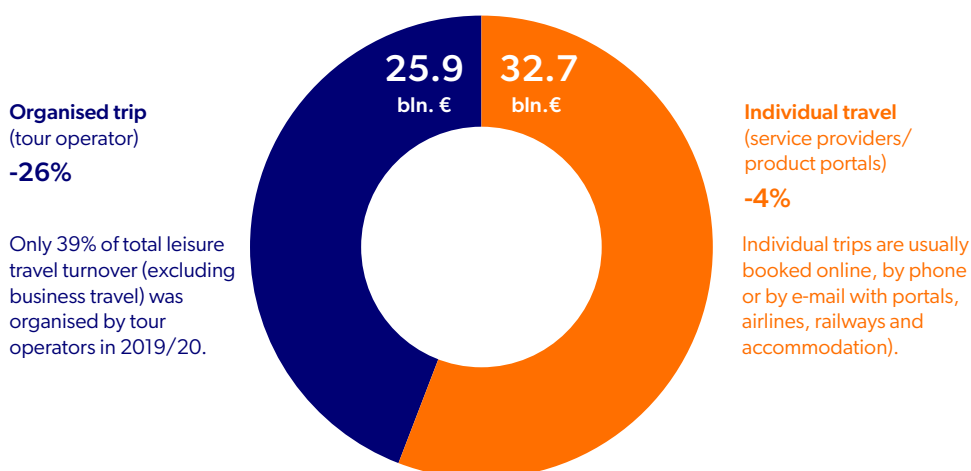
56% (€ 32.7 billion)

› service providers/product portals (individual travel).

Chart 2

## The entire market for leisure travel

Turnover from all pre-booked trips with one overnight stay or more in the tourism year 2022



Source: DRV/GfK

The following developments can be identified as a result of the pandemic: while the volume of individual service providers and product portals has almost returned to 2019 levels (€33 bn vs. €34 bn), the volume of organised travel via tour operators and travel agencies is still significantly below pre-crisis levels (€26bn vs. €35bn).

## 2.2 Travel expenses

German holidaymakers took around 12% fewer trips in 2022 than in 2019 (holidays and short breaks), but at the same time travel expenditure rose by around 8.9%. At over 13%, spending on short holidays has risen more significantly than on longer holidays (+7%). Drivers of the higher costs are to be found both in the destination itself and on the supplier side in Germany. For example, some major tour operators in Germany have been able to achieve a consistently high turnover with significantly fewer guests (see Table 1).

In its current 2023 study, Reiseanalyse (RA) found that holiday spending relative to net disposable household income was 7.7% in 2022. The last time this share was this high was in 2008. It can be assumed that, due to inflation, costs will continue to rise in 2023 and also in 2024. Currently, holiday trips are still very important for Germans, so it can be expected that demand will not dip in the short term. Whether the values of the 2030 trend study of the FUR (Forschungsgemeinschaft Urlaub und Reisen e. V.) will come true, namely around 97 million short holidays and around 70 million holiday trips in 2025, will depend strongly on the worldwide inflation trend.

## 2.3 Explanation of terms, which forms of trade exist

In Germany there are about 2,300 tour operators and about 9,000 travel agencies. Travel agencies are usually only intermediaries, i.e. they arrange products from third-party suppliers (tour operators, service providers) for a commission. For some years now, travel agencies have been charging advisory fees because commissions earned from brokered services are no longer sufficient.

There is a wide array of tour operators, which can be categorized into the following groups:

- For Individual Travellers (FIT): Specialized tour operators catering to individual travelers.
- Group travel companies that acquire sizable allocations and subsequently resell them to groups of travelers, often in settings like schools or clubs.
- Wholesalers that purchase substantial allocations and then resell them at a markup to smaller tour operators or travel agencies.
- Online travel platforms: These platforms compile package tourism offerings and directly distribute them online or through travel agencies. Travel agencies and travel agency associations Intermediaries between travellers and travel suppliers, offering expertise and convenience by coordinating and organizing travel arrangements on behalf of their clients. When in collaborative associations, travel agencies collectively form a network, sometimes even designing and marketing their own excursions.
- Online Travel Agencies (OTAs): These travel platforms promote services like hotels, flights, and car rentals through online channels.

Another differentiation between tour operators and travel agencies can be established by considering their products or areas of specialization.

The subsequent list is provided as an illustrative example and is not intended to be comprehensive:

**Last minutes** › 5vorFlug, l'tur, lastminute.de, restplatzboerse.de

**Package holidays** › ab-in-den-urlaub.de, FTI, Alltours, Expedia, Opodo, weg.de, Dertour, TUI

**Family holidays** › 1-2-Fly, Tropo, ITS

**Discounters** › ALDI Reisen, Lidl Reisen, Netto-Reisen, PENNY Reisen

**Accommodations** › booking.com, trivago, Airbnb, Casamundo, HRS, FeWo-Direkt, hotel.de, HomeToGo

**Flights** › Kayak, Swoodoo, fluege.de, skyscanner

**Short breaks & Experiences** › TUI Musement, Travador, Travelcircus, Travelbird

**Long-distance coaches & trains** › Flixbus, Deutsche Bahn, Thalys

**Cruises** › AIDA, Phoenix Reisen, E-hoi, Nicko Cruises

**Group travels** › CTS Reisen, Behringer Touristik, DB Gruppenreisen, Alpetour

Source: Travel Suppliers & Tour Operators at a Glance (reiseuhu.de)



## 2.4. Supply: tour operators, travel agencies and OTAs

### Diversified approach

The package tour market experienced significant losses due to the pandemic. Consequently, tour operators adopted a more diversified approach. Independent components, such as accommodation, became available for online booking primarily through the respective providers' own platforms. Additionally, product offerings expanded to encompass earthbound tours.

### Increasing complexity

While tour operators, travel agencies, and OTAs are increasingly seeking economies of scale, true monopolization is absent within these sectors. On the contrary, the market is becoming progressively complex. In addition to the prominent players, a growing number of specialized tour operators are emerging, catering to specific target audiences, particular destinations, or distinct travel themes.

## 2.5. The tour operator market in the D-A-CH region

Table 1 illustrates the distinct trajectories that various individual tour operators have followed from 2019 to 2022. Especially noteworthy is the marked underperformance of tour operators within the cruise, long-haul and educational travel segments in comparison to pre-pandemic levels, evidenced by reduced guest PAX numbers and turnover. Similar trends are observed among providers of coach and group travel.

Two notable trends emerge. Firstly, it is evident that many tour operators, particularly the major players, managed to offset customer losses by implementing higher prices. Secondly, the tour operators ranked fourth and fifth have reaped benefits from Thomas Cook's insolvency, evident in increased guest numbers and revenue.



### Shrinking workforce

One of the developments resulting from the pandemic, which plays out in the short and medium term, is the changing size of the workforce. For example, at TUI Group, the largest European tour operator, massive job cuts were made during the pandemic. The total number of employees fell from more than 71,000 employees in 2019 to 48,330 in 2020. In 2022, this recovered somewhat with a workforce of 61,000. Yet the number of employees is still almost 15% below pre-pandemic levels.

Table 1

### Top 15 tour operators in D-A-CH (German-speaking countries) Based on turnover in millions of euros and persons booked/PAX

Rank	Tour operator	Turnover 2021/22	Change	Turnover 2018/19	PAX 2021/22	Change	PAX 2018/19
1	TUI	5.800	+/- 0	5.807	5.8 M	-21%	7.3 M
2	DER Tourism	3.000	-12%	3.440	3.2 M	-47%	6 M
3	FTI Group	2.960	-7,5%	3.200	3.6 M	-30%	5.1 M
4	Alltours	1.864	+28%	1.450	1.9 M	+11%	1.7 M
5	Schauinsland Travel	1.860	+35%	1.370	1.7 M	+6%	1.6 M
6	AIDA Cruises	1.370	-35%	2.110	n.a.		1.2 M
7	TUI Cruises	1.240	-30%	1.773	481 K	-25%	644 K
8	Hotelplan Group	1.225	+/- 0	1.219	n.a.		n.a.
9	Anex Group	365		n.a.	450 K		n.a.
10	Ferien Touristik / Coral Travel	353	+150%	141	428 K	+108%	205 K
11	Phoenix Travel	305	-25%	409	155 K	-11%	195 K
12	LMX Tourism	253	+4%	243	380 K	-10%	420 K
13	Hurtigruten	195	+13%	172	45 K	-6%	48 K
14	Trendtours Tourism	179	-41%	305	205 K	-51%	415 K
15	Bentour Travel	118	+12%	105	153 K	-4%	159 K

Source: FVW Tour Operator

## 2.6. The travel agency market in Germany

With an approximate count of 9,000, Germany continues to host a considerable number of travel agencies and outlets.

The percentage of independently operated travel agencies remains modest. Dominating the market are three major entities: RT/Raiffeisen Touristik Group (RTG) and Schmetterling International, each boasting just under 3,000 outlets, followed by TSS Group with around 2,300 outlets. Many renowned tour operators, in turn, route their services through these corporations. Furthermore, entities such as the TUI Group and DER Touristik maintain their own network of franchise outlets, responsible for their individual sales operations.

### Travel agencies vs. tour operators

Until and including 2010, consumers predominantly made a higher number of bookings through traditional travel agencies. This applied for both package tours and (a combination of) individual travel components, such as flights, hotels, rental cars, train tickets, etc. Starting from 2010, the turnover trajectories of travel agencies and tour operators diverged. While tour operators witnessed a decrease in turnover of approximately 26% compared to 2019, travel agencies

experienced a sharper decline of 38%. This shift is attributed not only to increased online activity by tour operators but also to the emergence of OTAs. Nevertheless, the total travel agency turnover, including business travel, rebounded to around €15.3 billion in 2022.

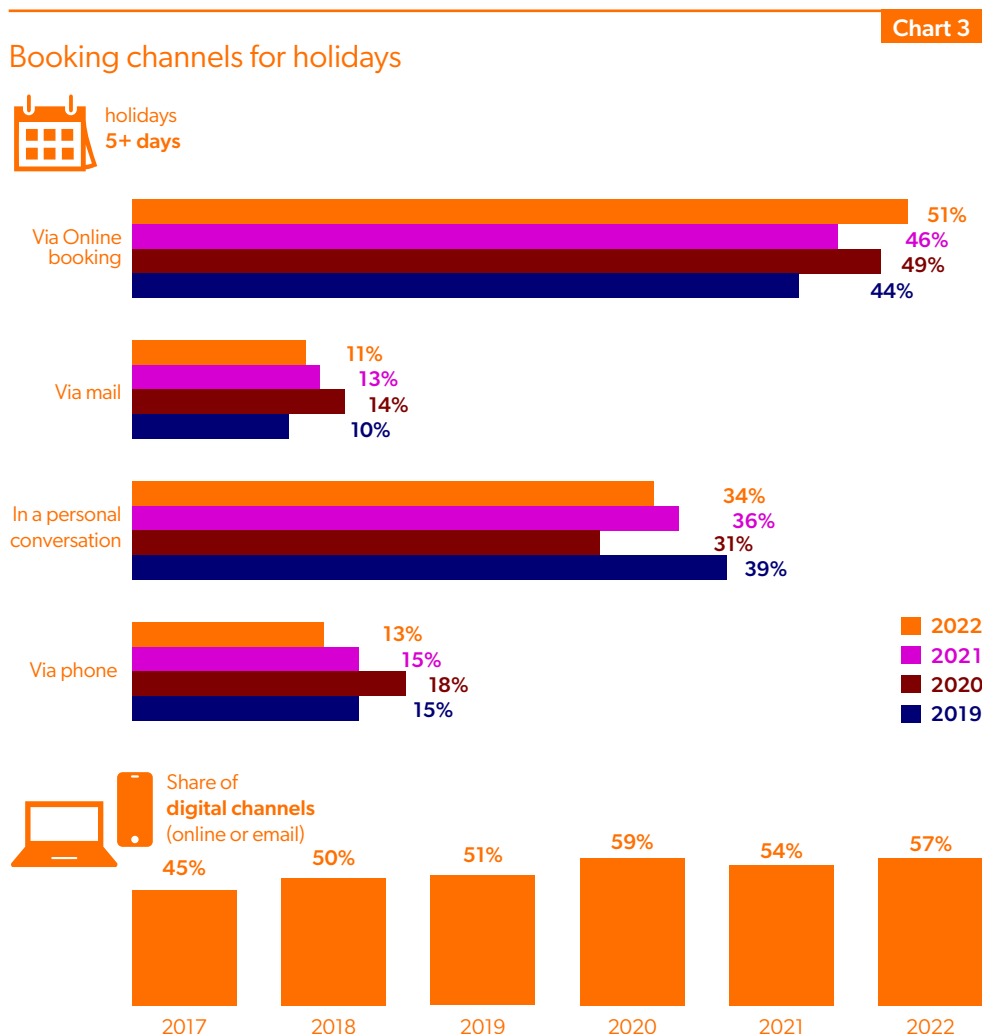
### Intriguing data

Regrettably, the tour operator dataset from the FVW International trade magazine displays notable gaps in the 2022 figures. Nonetheless, some data are intriguing. For a considerable number of the leading 15 tour operators (refer to Table 1), third-party distribution constitutes more than 60% of their market share. This proportion is even more substantial for DER Touristik and Schauinsland Reisen, boasting 80% and 97% respectively. DER Touristik and Schauinsland Reisen also derive a considerable portion of their revenue through online distribution, ranging from 30% to 40%.

Consequently, for these two tour operators, traditional third-party travel agencies still contribute to approximately 50% of their turnover. Online distribution is facilitated through OTAs like Check24, Invia, and other platforms, effectively functioning as intermediaries. TUI Group operates in a distinctive manner, employing its own online platform tui.com, which likely accounts for the majority of its 30% share in revenue generated through online distribution.

## 2.7. OTAs in Germany

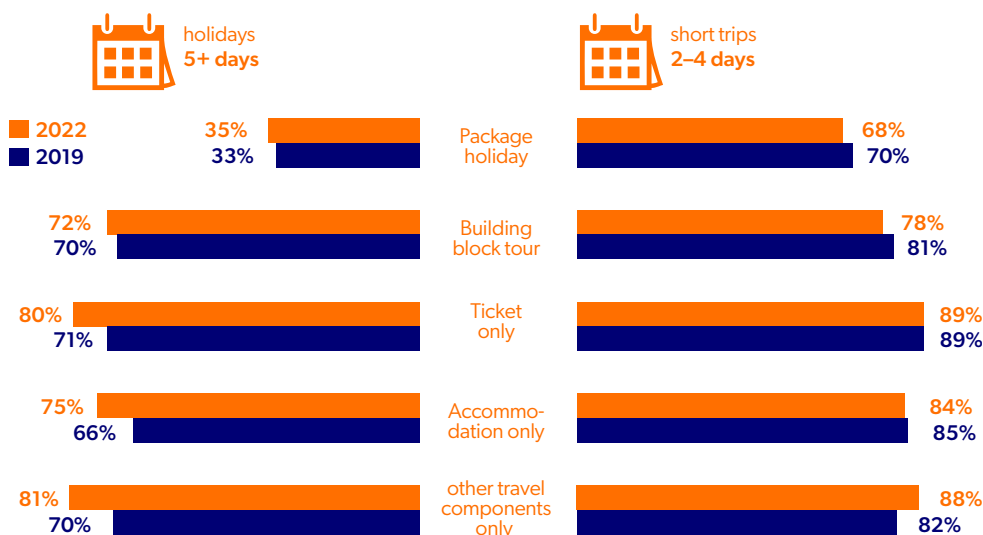
The OTA market in Germany is experiencing continual growth, with the ongoing process of digitization further amplifying this trend. As per the Reiseanalyse, in 2022 over half (57%) of all holidays lasting more than five days was reserved online (refer to chart 3).



In Germany, the type of holiday influences the choice of booking channel significantly. Package holidays are frequently booked at traditional travel agencies. Conversely, digital booking platforms have become predominant for individual services like transportation, accommodations, and other travel components (refer to chart 4).

Chart 4

### Share of bookings via digital channels by travel organisation



For holidays lasting 5 days or more, booking via digital channels has increased significantly for all types of organisation from 2019 to 2022. Individual components are booked digitally most frequently, package tours least frequently. Short holidays are booked more frequently via digital channels than longer holidays for all types of organisation.

### Popular portals

There are only a few major players that dominate the OTA sector. What sets them apart is their business model.

When it comes to accommodation, booking.com and Airbnb today are the most popular portals on the German market. In addition, there is Expedia, which operates under its worldwide brand name Expedia, as well as that of its German subsidiary Trivago, which positions itself as a hotel comparison portal. In just two years, Trivago nearly doubled its revenue, from \$205 million in 2020 to \$380 million in 2022.

As more tour operators also rely on online distribution channels, there are only a few major platforms left that shape the tour operator business mainly as online intermediaries. Check24 is the largest provider in this field. Tour operators such as Alltours, Schauinsland Reisen and TUI sell their products through this portal. Invia, the operator of the OTA ab-in-den-urlaub.de, and Lastminute Group, with portals such as weg.de or the rating portal holidaycheck.de, are also other major parties. In recent years, TUI has increasingly focused on strengthening its own online channel, in addition to the travel agency and OTA segments. TUI.com is now one of the best-selling online portals in Germany.

Given that in the German market only a limited number of providers disclose their turnover figures, we must rely on estimations. According to a study by fvw/TravelTalk in December 2022, the following ranking was revealed:

### The five leading online distributors in Germany

Ranking according to turnover

Rank    travel portal

1	booking.com
2	Check 24
3	TUI.com
4	Invia / ab-in-den-urlaub.de
5	Holidaycheck

Source: fvw

Numerous OTAs utilize multiple platforms to distribute travel services. A concise overview, though not exhaustive, of some OTAs active in the German market is below:

**Booking holdings** › booking.com, agoda.com, rentalcars.com

**Check 24** › check24.de

**Expedia Group** › expedia.de, hotels.com, ebookers.de, trivago.de

**Invia Germany** › ab-in-den-urlaub.de, fluege.de, reisen.de

**Holidaycheck** › holidaycheck.co.uk

**TUI** › tui.com, ltur.com, airtours.de

**Vacaciones eDreams** › opodo.de, edreams.de, travellink.de

**HRS** › hrs.de, hotel.de, tiscover.com

**LM Group** › lastminute.de, weg.de

**Airbnb** › airbnb.com

## 2.8. Demand: motives and preferences

Consumers are progressively seeking and securing their holidays through multiple channels, a concept referred to as omnichannel. This entails the simultaneous exploration of travel options both online and offline, using diverse platforms. Recommendations from friends hold considerable sway in the decision-making process, as do reviews on comparison sites.

### Complexity influences booking mode

Discerning consumers are inclined to compare various aspects such as prices, quality, and cancellation terms. The mode of booking, whether through a local travel agency, via phone, via email, or directly online, depends on numerous factors. Notably, the complexity of the product significantly influences this choice. These days, more consumers book standalone services like train tickets or accommodations directly and online. On the other hand, group, long-distance, and package tours frequently are booked following the conventional route, involving engagement with a travel agency.



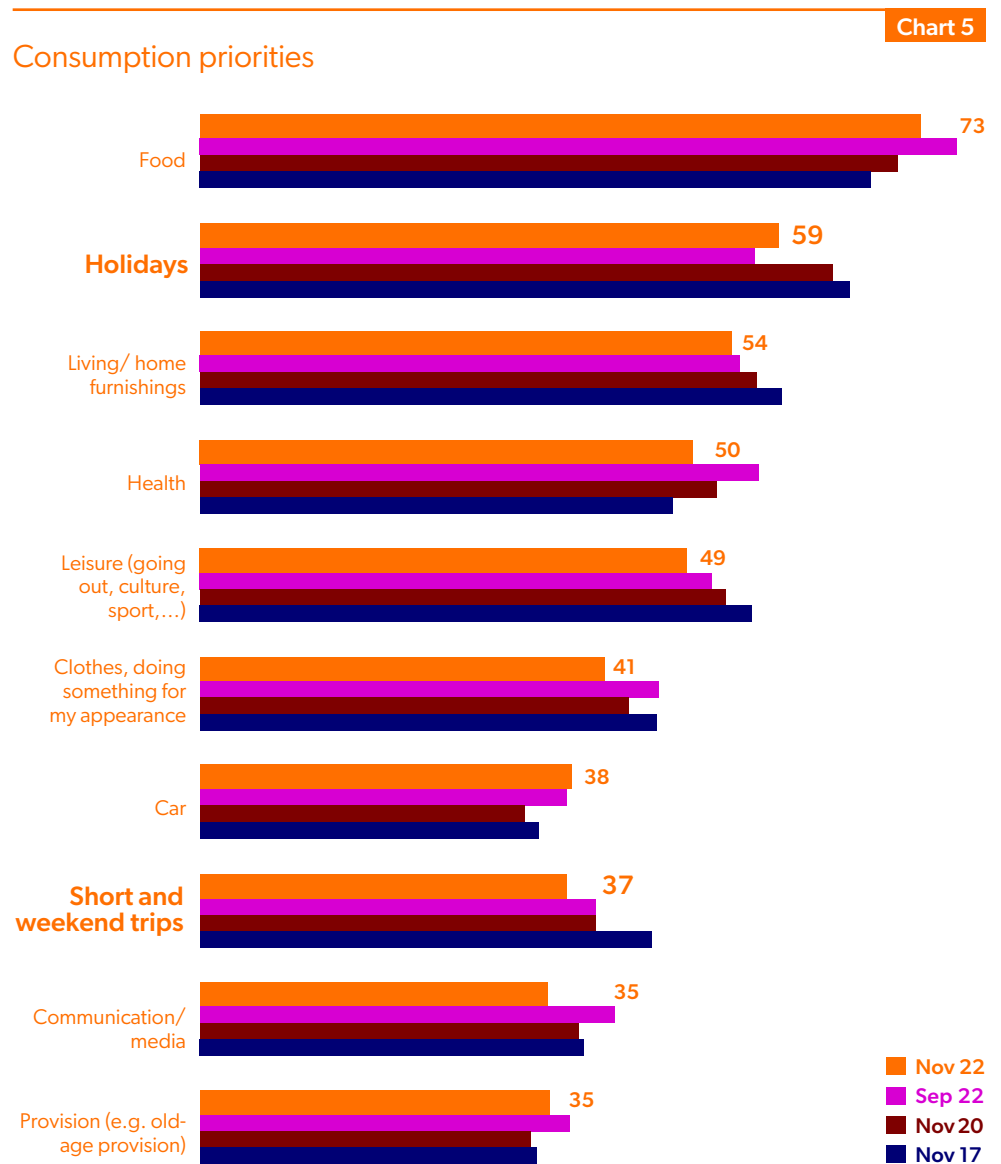
## 2.9. Development of demand

The demand for holidays and travel in Germany has experienced a notable resurgence following 2020 and 2021, the years affected by the COVID-19 pandemic. In 2022, the spending on package holidays and individual trips totaled €58.6 billion. This accounts for slightly under 3% of the overall private consumption within Germany.

### Household income as a driver

The desire for travel depends on the disposable household income. As previously stated, the average travel volume among German individuals stands at just below 75%. Throughout 2022 and the initial months of 2023, consumers showed more willingness to allocate higher funds towards travel expenditures, encompassing both extended holidays and short trips. chart 5 underscores the significance of holidays for German citizens as they rank second among the priorities of private consumption. However, it remains to be seen whether this trend will continue considering the current overall inflation.

Germans across all age groups share an appetite for travel, but the inclination to travel is most pronounced within the 35-59 age demographic. This might be attributed to generally higher disposable income in this age bracket, as depicted in chart 5.



Question: "I have a list here of different things you can spend your money on. Which of these areas are particularly important to you personally?" Basis: Travelers (holiday trip or short holiday trip last 12 months) in German-speaking population 14-75 years (Sep 22: 18-75Jahre): Source: FUR, RA online 11/2022 and previous studies

### Purchase types

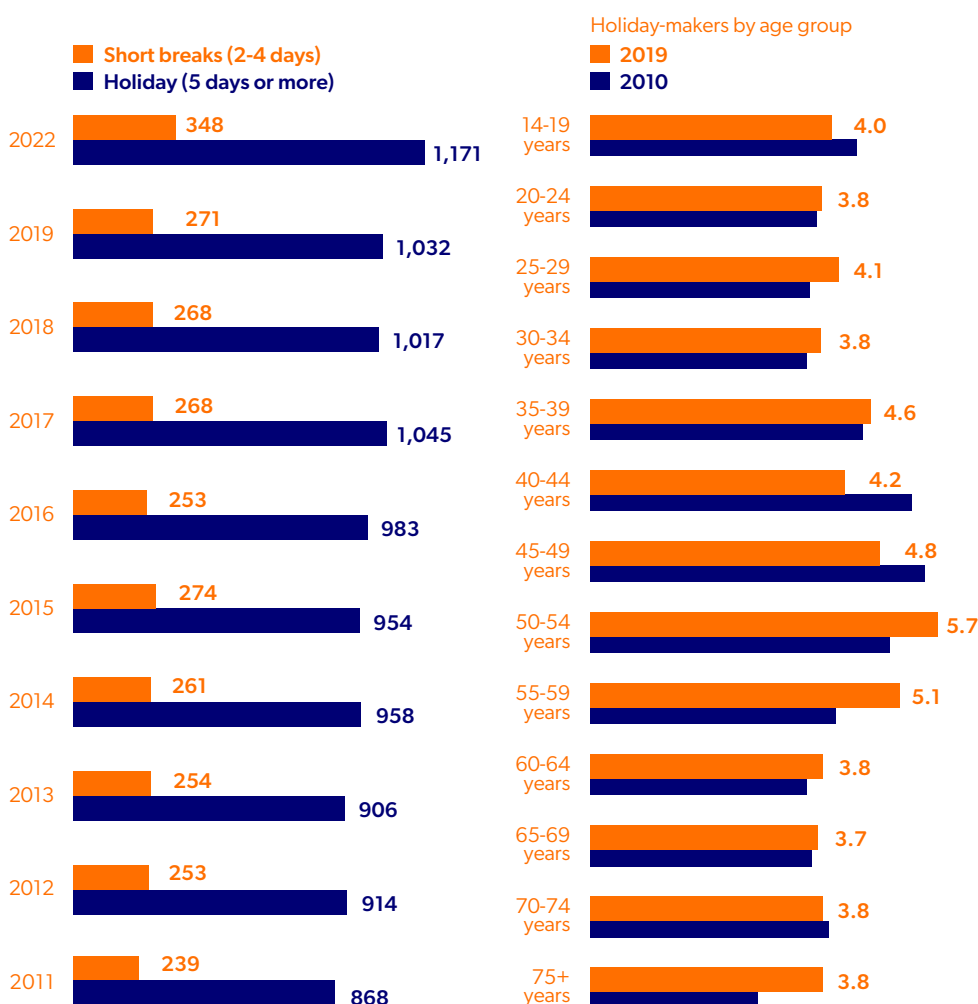
In addition to travel volume and socio-demographic characteristics, another factor influencing travel demand is the purchasing type. A mere 2% of all holidaymakers in Germany identify themselves as 'luxury tourists'. Similarly, budget-conscious travelers, who prioritize the lowest price despite potential compromises in quality, constitute just 10% of all purchase types. The prevalent middle group entails two distinct purchasing types, those oriented towards price and those focused on quality. In 2018, price-oriented travelers constituted the largest segment at 54%. Their position can be summed up with the statement: "I seek the lowest feasible price for my holiday, while maintaining a satisfactory price-quality ratio."

Conversely, quality-oriented holiday purchasers prioritize good quality and are willing to pay a reasonable price to attain it. This category has experienced the most substantial growth over the past 15 years, accounting for 34% of the market share.

Pent-up demand, consumption priorities, inflation, and the evolution of purchasing preferences are all factors contributing to the rise in average travel expenditures for both extended holidays (>5 days) and short getaways (2-4 days), as illustrated in chart 6.

**Chart 6**

### Expenses for holiday trips



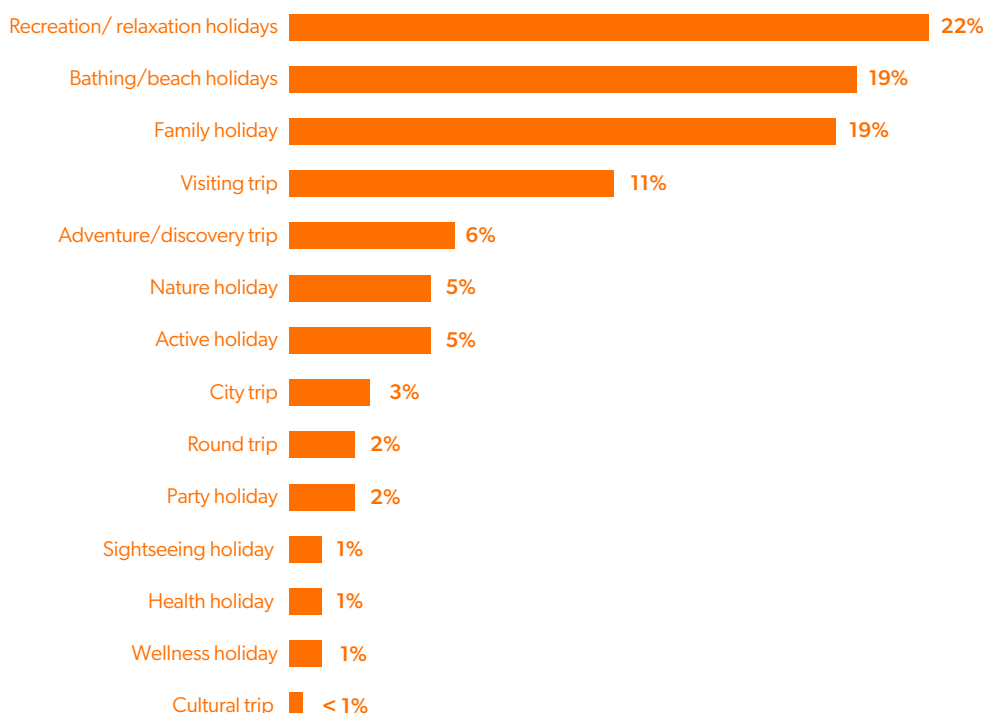
Holidaymakers by age group, in millions, German-speaking population of 14 years and older, RA 2011 and RA 2020 face-to-face

## 2.10. Holiday types

When it comes to booked holidays, a differentiation can be made between longer holidays (5 days) and shorter breaks (2-4 days). Longer holidays predominantly revolve around beach and leisurely getaways. Typically, these are family-holidays, encompassing both couples and families with children. Package holidays or curated tours offered by the leading FITs are the most popular. Visiting friends and family is also a well-liked travel motivation. Meanwhile, the pandemic has spurred a surge in interest for nature-based and active holidays

Chart 7

### Types of holiday travel in 2022



Basis: holiday trips 5+ days of the German-speaking population 14+ years / \*Types of holiday travel in single answer  
Source: Reiseanalyse 2018-2023, FUR

#### Longer trips

As per the RA 2023 report, the primary holiday motivations for longer trips encompass the following five factors:

1. Escaping daily routine (72%)
2. Seeking sun and warmth (71%)
3. Aiming for enjoyment and fun (69%)
4. Craving relaxation (68%)
5. Recharging and gaining fresh energy (67%)

#### Short breaks

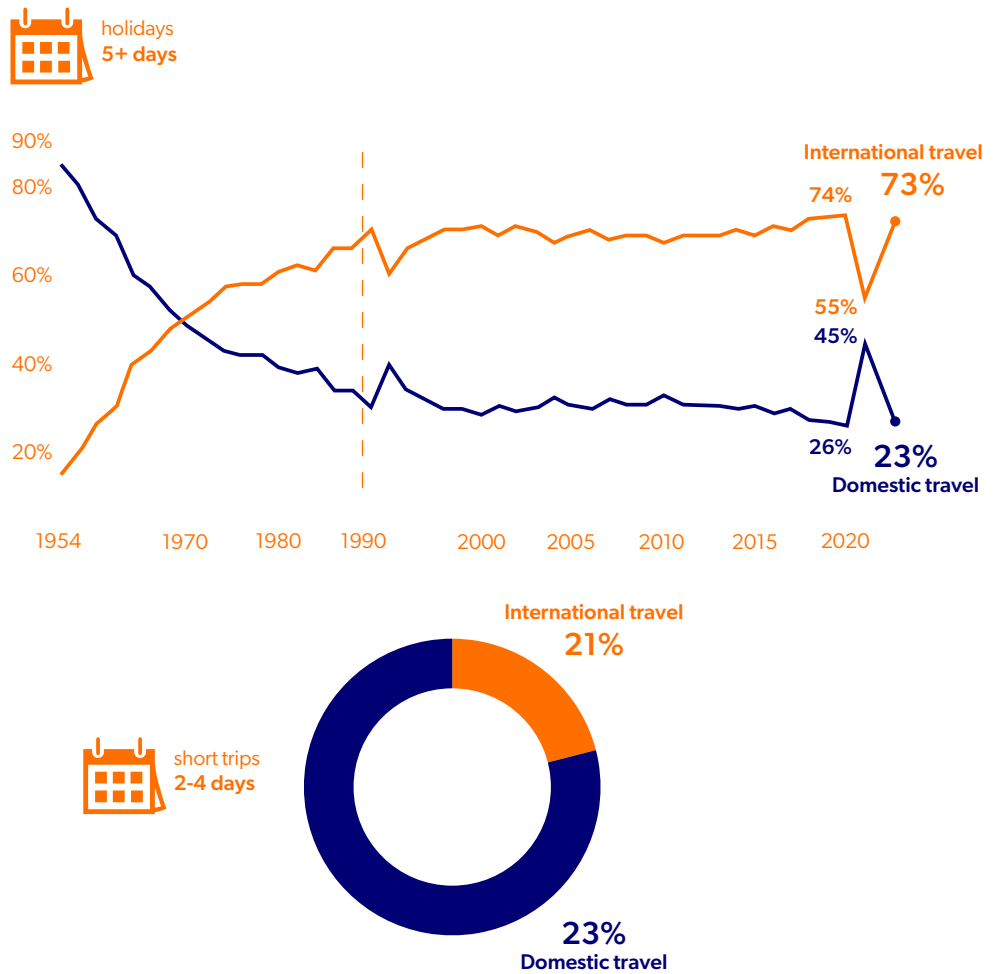
A different picture emerges with regard to short breaks, both in terms of motives and the chosen booking channels. City trips within the home market and abroad are the main motivation. In many cases, standalone services - such as accommodation - are booked either through an OTA or FIT. Single travelers form the largest group in this segment, but cities are also very popular with groups.

### Domestic travel vs. travel abroad

Prior to 2019, there was a discernible trend among Germans to travel abroad. However, during the pandemic-affected years of 2020 and 2021, a contrasting shift transpired toward staycations (domestic holidays) and trips to neighboring countries. This shift was a direct outcome of pandemic-related travel advisories and travel limitations. During this period, Germans exhibited heightened caution when selecting travel destinations. The subsequent chart unambiguously illustrates that with the easing of restrictions, the trend observed in 2019 has seamlessly resumed. Additionally, for holidays longer than 5 days, destinations abroad remain a primary choice, whereas for shorter trips, domestic locations are distinctly preferred.

### Domestic and international travel 1954 till 2022

Chart 8



Basis: holiday trips 5+ days of the German-speaking population 14+years, till 1990 old federal states only, including German-speaking foreigners, short-trip travels 2-4 days of German-speaking population, 14-75 days.  
 Source: Reiseanalyse 1970-2023, FUR: 1954-1969: Various studies

### Tour operators and their target groups

The primary target audience varies depending on the specific type of tour operator.

#### OTAs (such as Expedia and Lastminute Group)

- Usually 25-50 years old
- Book 1-3 months in advance
- Usually book stand-alone services such as accommodation

#### Tour operators (like TUI and FTI)

- Families with children, couples and singles
- Interested in 1) city breaks, 2) seaside holidays and 3) theme parks
- Book 20-90 days before departure
- 30% book online / 70% book via travel agencies



### Coach tour operators, group tour operators and wholesalers:

- The 50+ age group, and school, youth and club groups
- Groups book significantly longer in advance, mostly 6 months to a year
- In group travel, decision making is primarily guided by the planned activities and experiences (such as exhibitions, concerts, excursions, sports events, etc.) rather than the destination itself. Usually request a complete itinerary or excursion program (active in nature, seasonal events such as tulip blossom, festivals, Christmas markets)
- Often opt for personal contact when booking (eg. by phone), but itineraries are increasingly available online
- Depending on the size of the company, customers are usually local and come from the same region as the provider
- Customer groups tend to be loyal and book repeatedly with the same provider

## 2.11. Means of transport

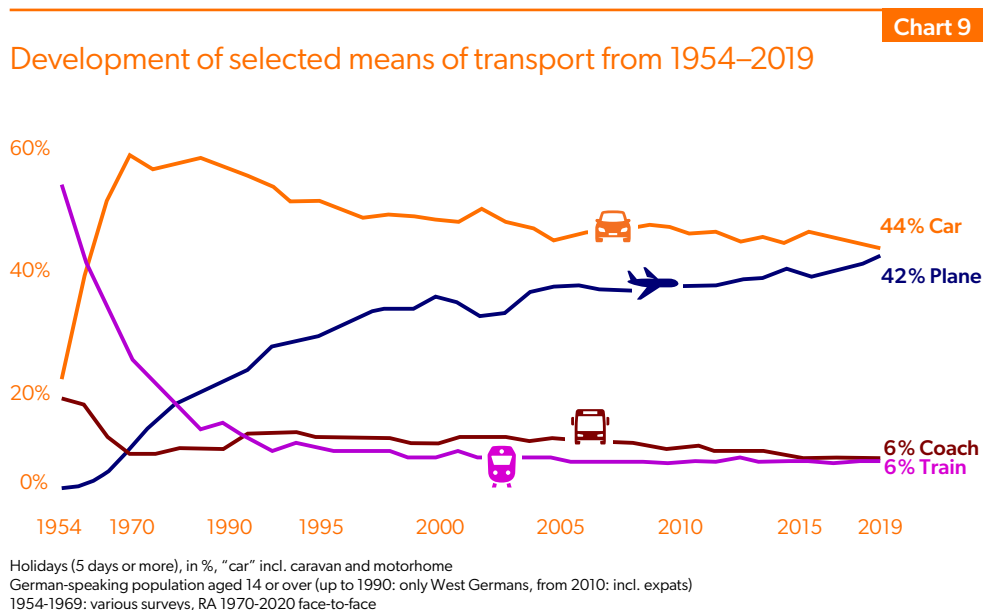
Air travel has witnessed significant popularity growth over the past three decades, driven by the emergence of low-cost airlines. The fierce price competition among airlines has resulted in reduced fares, rendering air travel an increasingly favored choice when organizing extended holidays.

The pandemic temporarily halted air travel, boosting demand for nearby destinations in 2020/2021 and reigniting car travel. This trend was short-lived. The subsequent graph indicates that starting from 2022, travelers reverted to their prior habits, leading to the restoration of air travel.

### Train and plane instead of car

Transport options for short getaways are heavily influenced by the destination and travel motive. For city trips, plane or train travel is typically selected, hinging on direct routes and cost considerations. Conversely, when travelling to regions beyond major urban centers, the car is the preferred mode of transportation.

Currently, rail travel's market share surpasses that of bus and coach services, with an anticipated upward trajectory. Numerous European rail operators, including Deutsche Bahn, are enhancing connectivity as part of the EU's Green Deal, striving to double the share of international rail passengers by 2030.



# 3

## Trend topics

Three predominant trends in the tourism sector are currently evident: digitalization, sustainability, and the popularity of camping holidays or holidaying in rental homes.

### Digitalization in tourism

According to a 2022 survey, 46% of polled tourism companies in Germany anticipate substantial effects from digitization on tourism's evolution by 2030 (source: 'Tourism: Trend Topics in Germany until 2030' | Statista, 2022). Online reservations, in particular, have witnessed substantial growth since the previous survey from 2020.

### Sustainable travel

There is increasing demand for sustainable travel, as it is more popular than ever before. In general, it involves three basic aspects: social, environmental and economic. More and more people want to make a positive contribution to society, the environment and the economy with their travel experiences. The main driver of this trend is the very young generation (Generation Greta / GenZ), who are very concerned about climate change. At the same time, there is a greater interest in earthbound travel, especially for shorter holidays. Due to the short travel distance and good connections (by private car or coach/train), the Netherlands can benefit from this trend, particularly for the NRW / Lower Saxony region.

### One's own space

Another noteworthy shift is the significant transition towards opting for holiday homes and camping accommodations. The pandemic highlighted the appeal of holidaying within the confines of "one's own space", offering both privacy and a secure setting. This trend has persisted in the post-corona era, particularly in the context of travel to the Netherlands. Due to this continuing popularity of holiday homes and camping holidays, we will examine this trend in more detail.

As stated before, both sustainability and digitization will play an increasingly important role in the coming years. Thus, we will discuss these aspects in more detail below.

## 3.1. Digitalization

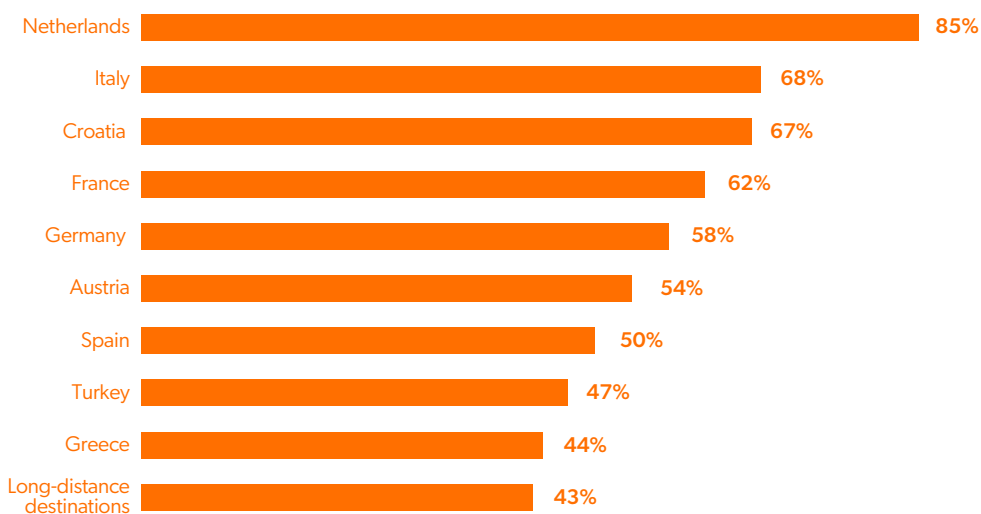
In the tourism sector, the progression of digitization is prominently evident with the online travel market experiencing consistent growth. A rising number of travelers are leveraging digital technology for various aspects of their journey, from pre-trip information gathering to in-trip assistance.

### Surge in online bookings

Notably, online bookings are witnessing substantial growth, with their proportion expanding rapidly. In the case of the Netherlands, a popular destination reachable by private car, the prevalence of digital bookings reached its pinnacle at 85% in 2022/2023. This marks an increase from the 78% recorded in 2020 (refer to chart 10). The remaining 15% pertains to bookings made through (telephone) interactions with travel agencies or tour operators, as well as local bookings within the Netherlands (as depicted in chart 10).

Chart 10

### Share of travel bookings via digital channels in Germany by destination in 2022/2023

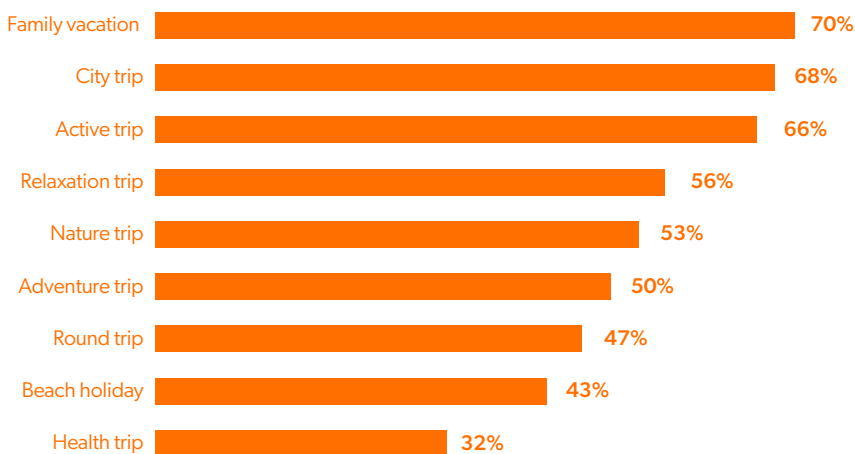


More information: Germany, FUR, December 2022 and January 2023, from 14 years, Personal interviews  
Source: Verband Internet Reisevertrieb

The holiday type 'family holiday' had the highest share of digital bookings in 2022 at 70%. City trips were in second place, accounting for 68% of digital bookings (see chart 11).

Chart 11

### Share of travel bookings via digital channels in Germany by holiday type in 2022/2023



More information: Germany, FUR, December 2022 and January 2023, from 14 years, Personal interviews  
Source: Verband Internet Reisevertrieb, FUR Statista 2023

## 3.1.1. New opportunities: Digital experiences before and during the journey

Bookings are just one area where digital transformation is unfolding. For example, intelligent solutions offer new opportunities to simplify travel processes and create new forms of travel experiences. Using mobile apps simplifies processes such as checking into a hotel room or searching for interesting places or activities. And often there already is the possibility to discover a destination or accommodation prior to the trip through a virtual tour.

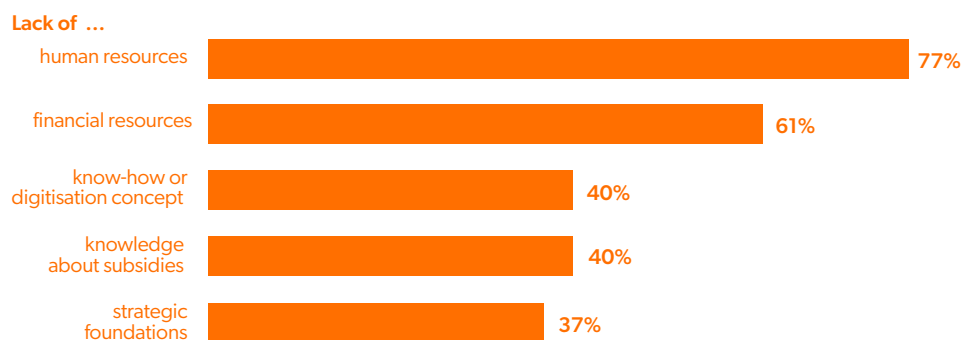
Via the website of Tourismus NRW e.V. visitors can, for example, take a virtual 360° tour of the five UNESCO World Heritage Sites in NRW before actually visiting them. And tour operator DER Touristik offers 360° videos through travel agencies, which can be viewed with VR glasses. TUI also works with VR glasses for virtual hotel tours.

### 3.1.2. Challenges in digitalization

Increasing digitization offers many benefits and new ways to experience a destination. At the same time, it poses some challenges for tourism organizations. According to a 2021 survey, for tourism organizations in German destinations, the biggest obstacle to the implementation of digital tools is currently the lack of staff: 77%. Other problems are the lack of financial resources (61%) and the lack of know-how or a digitization concept (40%).

Chart 12

#### Ranking of the current biggest obstacles to the implementation of digital tools in German destinations from the perspective of tourism organisations in 2021



More information:

Germany, 22th March 2021 till 30th April 2021, 319 complete questionnaire, Country- and Destinationmarketingorganisation

Source: BTE - Tourismusmanagement, Regionalentwicklung, DTV Statista 2023

## 3.2. Sustainability

The tourism industry contributes significantly to CO2 emissions. According to a 2018 study, the tourism industry is responsible for about 8% of global greenhouse gas emissions (UNWTO, 2018). The World Tourism Organization calculated that if no action is taken, tourism-related emissions will increase by another 25% by 2030. The tourism sector in the Netherlands, with all its subsectors, makes a major contribution to CO2 emissions. Overnight tourism in the Netherlands alone caused 7.6 megatons of CO2 in 2019, which corresponds to approximately 5% of total Dutch emissions.

#### Affected by climate change itself

Not only is the tourism sector under attack as a polluter of the environment, it itself is also strongly affected by the consequences of climate change. Rising temperatures and the associated extreme weather conditions, such as heat waves, droughts, storms, and floods, have a major impact on the attractiveness of many destinations. For example, from Easter 2023 there were severe heat waves in southern Europe, which led to devastating forest fires in Greece and Italy. The Netherlands is also affected by the consequences of climate change with a sharp rise in sea level, a fall in groundwater level and periods of heavy rainfall and extreme drought.

Some tourism associations and marketing experts expect that increasing extreme weather events will lead to a lasting change in travel behavior in Europe. According to forecasts, more travelers will opt for cooler destinations, or move their holidays to spring or autumn. Recent data from the European Travel Commission (ETC) already points to a 10% drop in travelers wanting to fly to the Mediterranean between June and November, compared to the previous year.

### 3.2.1. Growing trend towards sustainable travel & ecotourism

The World Tourism Organization in 2005 described sustainable travel as: tourism that takes full account of current and future economic, social and environmental impacts, taking into account the needs of visitors, industry, the environment and host communities.

As far as German travelers are concerned, a survey in 2022 showed that sustainability plays a major role in choosing a holiday destination for a significant proportion of respondents (37%). Nonetheless, the survey also illuminated the potential for enhancement in terms of fostering sustainability awareness. About 22% of the respondents indicated that sustainability plays little or no role in the choice of a holiday destination (Statista, 2022).

All in all, ecotourism will experience impressive growth in the coming years. While the world market volume in ecotourism was still around \$181 billion in 2019, it is expected to increase by some 54% to about \$334 billion in 2027.

### 3.2.2. Booking behaviour for sustainable travel and accommodation

When it comes to planning sustainable holidays, the Internet is the most important source of information for travelers. A survey in 2022 showed that a total of 70% of German travelers use the internet for information when planning a sustainable holiday.

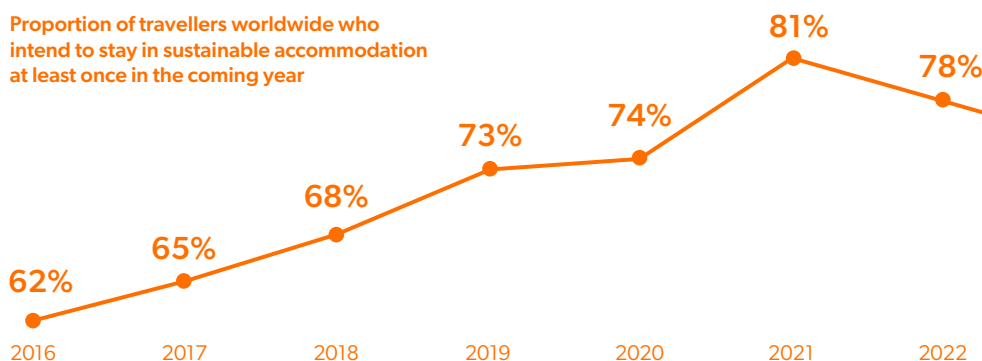
In addition to the aspects of transport and consumption, the choice of accommodation is also important when planning a sustainable trip. For 40% of German travelers, sustainability plays a (very) important role when choosing a holiday accommodation, according to the 2022 survey. These travelers attach great importance to their accommodation being environmentally friendly, socially acceptable and in line with their sustainable lifestyle (Statista, 2022).

Globally, 78% of travelers in 2022 said they planned to stay in a sustainable accommodation at least once in the coming year (Liu, 2022). But only 38% of travelers surveyed actively researched a property's actual sustainability efforts before booking their stay.

#### Is sustainable accommodation important for travellers?

Chart 13

Proportion of travellers worldwide who intend to stay in sustainable accommodation at least once in the coming year



Respondents from 30 countries and territories who have travelled in the last 12 months and plan to travel in 2021



### 3.2.3. CO2 compensation and eco-labels

CO2 compensation is another aspect that plays a role in booking behavior regarding sustainable travel. According to the 2022 "Reiseanalyse" of the "Forschungsgemeinschaft Urlaub und Reisen (FUR) e.V.", the share of trips compensated by CO2 emissions increased from 2% in 2018/2019 to 9% in 2021 (for holidays 5 days). For short breaks an increase was recorded from 6% to 17%.

Slightly faster, but still comparable, the share of bookings for trips with an ecolabel is also increasing, from 6% to 13% for holidays longer than 5 days and from 8% to 22% for short holidays.

### 3.2.4. The role of tour operators in sustainability

As a link between tourists and destinations, (online) tour operators play an important role in building a sustainable travel industry. Many tour operators have already acknowledged their responsibility and are taking important steps to develop sustainability initiatives and offer sustainable travel options. Large companies, such as Booking.com and Expedia, have committed themselves to pursuing international climate goals and developing climate action plans, for example by signing the Glasgow Declaration.

Booking.com has set itself the goal of achieving net zero emissions by 2040. The organization is actively developing programs to promote sustainable accommodation. On the website, for example, customers can now filter accommodation options by sustainability criteria. In addition, there is the annual Booking.com 'Sustainable Travel Report' that identifies and analyzes travelers' sustainable intentions. In turn, Expedia Group announced its global strategy for social impact and sustainability in September 2022. The new Open World technology platform aims to support start-ups and small and medium-sized enterprises working to improve access to the travel market for underprivileged travelers.

The World Travel & Tourism Council indicates that about a third of all tour operators are actively involved in sustainability initiatives in this way, which means progress. However, another third is still unsure about the steps they should take. The remaining third are currently taking no action at all.

### 3.2.5. Implications for tour operators

Although tour operators are increasingly focusing on promoting climate-neutral tourism, further steps are needed to support sustainable developments in tourism. For example, it is crucial for tour operators to offer the most sustainable range possible, including transport and accommodation, and also attractions and entertainment.

#### Supporting measures

Since it is currently still a challenge for many people to find and recognize sustainable booking offers, the relevant offers should be clearly labelled. The consumer must also be able to filter for sustainable options within the range. In addition, a calculation tool that measures the impact of a booking on the carbon footprint would help consumers better identify and compare sustainable offers.

And as an essential part of promoting sustainable action, social aspects should also be considered when developing sustainable travel products. Products should be developed with local communities in mind, including alternatives to destinations affected by mass tourism.

## 3.3 The camping and holiday home sector

It turns out that German travel behavior has changed quite a bit over the past three years, especially when it comes to accommodation types. During corona, people sought seclusion, as little contact as possible with other holidaymakers, and a safe environment. "Our own four walls" with minimal hygiene requirements became a bestseller. Camping and holiday home holidays were booming. Among Germans visiting the Netherlands, these two accommodation and holiday types became extremely popular and are still in high demand.

### 3.3.1. Camping tourism in Germany

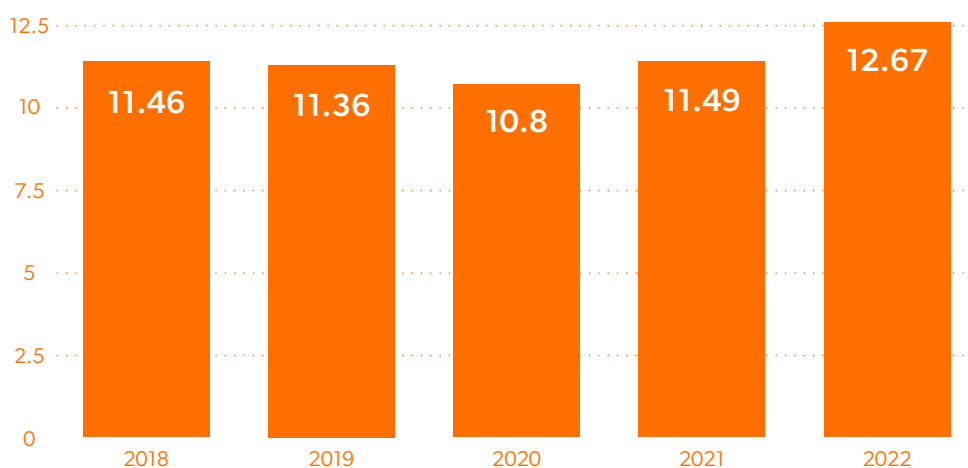
Germans like to go camping. For almost 13 million Germans, camping is their favorite form of holiday. About two million of them even often and regularly go camping or 'caravanning' in their free time. In general, however, hotels remain the most important type of holiday accommodation, followed by holiday apartments and houses. Nevertheless, more and more Germans have a camping holiday on their shortlist.

The market share is 6%, which corresponds to approximately 4.2 million camping trips of more than 5 nights (according to Reiseanalyse). According to statistics from Pincamp.de, Germany, Denmark and Austria were the top 3 camping destinations for German campers in 2020. The Netherlands came in fourth place.

The economical importance of camping and motorhome tourism to the German economy should not be underestimated. In 2021, during 120 million overnight stays and day trips, holidaymakers with motorhomes and caravans generated a whopping €15.1 billion in revenue for the German economy.

Chart 14

Number of people in Germany who favour camping holidays as a holiday trip (in million)



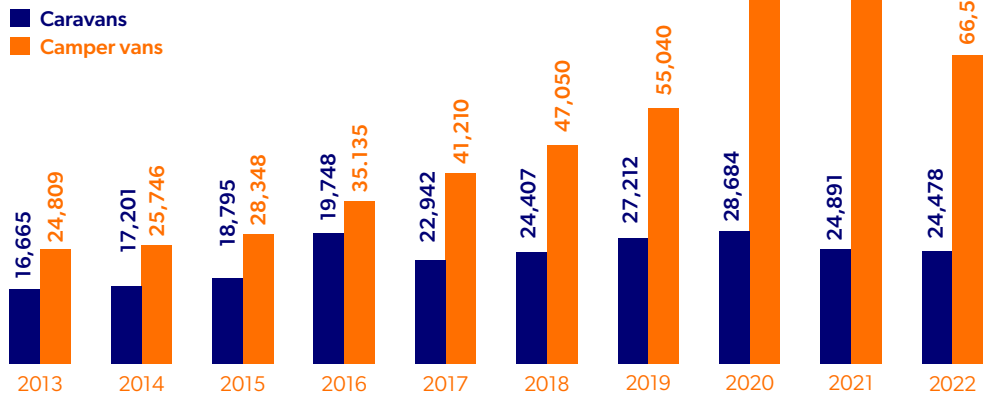
Source: Statista 2023

### Camping, a continuing boom that started during corona

In Germany alone, almost 25,000 caravans and around 82,000 motorhomes were newly registered in 2021. The sharp increase in 2020 is clearly due to the corona pandemic. Despite the crisis, no one wanted to give up their holidays and so people had to rely on their "own four walls". This promised greater safety and a lower risk of contracting the virus. After the pandemic, camping holidays continue to be in demand: according to Statista, almost 22% of German holidaymakers in 2022 indicated that camping is their preferred type of holiday (see chart 15).

Chart 15

### Number of new registrations of caravans and motorhomes in Germany from 2013 to 2022



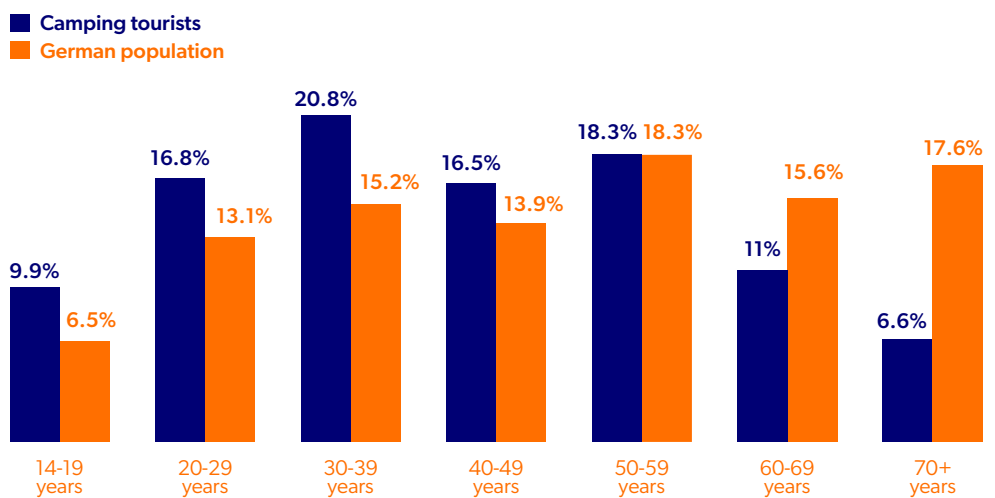
Source: Statista 2023

### Future development of the camping sector

It can be assumed that this trend will continue. The younger target group in particular has discovered camping, not least because of the perceived importance of sustainable travel. A negative sentiment towards air travel is particularly noticeable among the younger target groups. The rising costs of air travel will also contribute to the consideration of traveling earthbound.

Chart 16

### Camping holidaymakers in Germany by age compared with the population in 2023



Source: Statista 2023

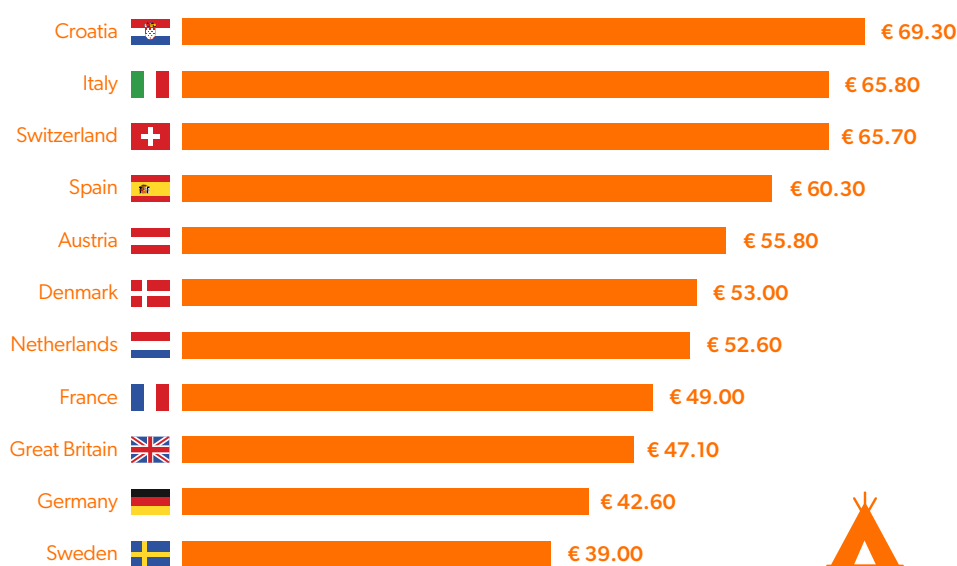
### Ecofriendly camp sites

Campground owners are responding to increased consumer awareness and concern about environmental and sustainability issues by equipping their camp sites accordingly. For example, there are extra environmentally friendly and sustainable campsites with the ECOCAMPING label. Their focus is on measures such as economical use of water, use of renewable energy, nature-friendly design of the campsite, avoidance of waste and disposable items, use of environmentally friendly cleaning products, use and sale of regional products and foodstuffs and 'soft' mobility, including the bicycle and e-mobility (source: Pincamp.de).

Travelers nowadays have to pay more for a camping holiday in nature. According to a current analysis by Pincamp.de, prices across Europe will have risen by 7% by 2023. Yet it is still the most affordable type of holiday. The overview below shows where camping in Europe is the most affordable.

Chart 17

Fig. Price analysis: Average cost of a night at a campsite in Europe 2023



Source: Pincamp.de

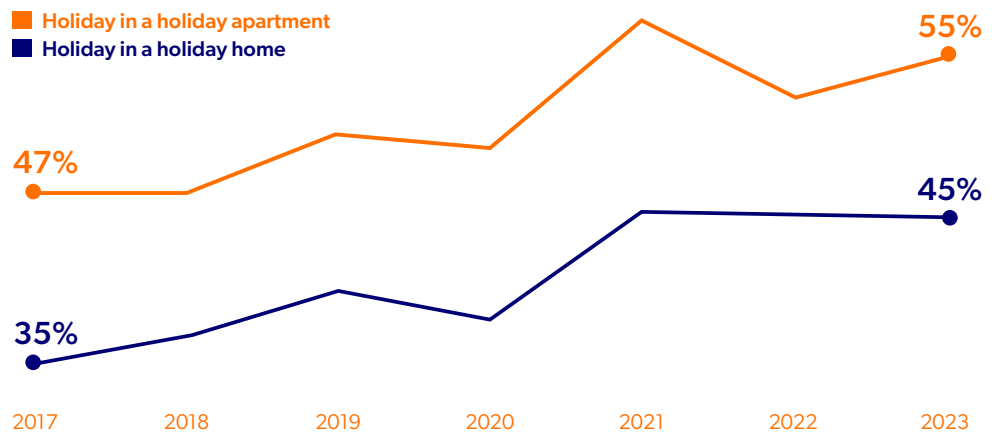
Where tents used to dominate campsites, nowadays they are expensive caravans and campers. The so-called 'glamping' firmly established itself and is here to stay. In addition to bare pitches, fully furnished tents are also offered, and more and more tiny houses and small bungalows are being rented. ADAC's super sites are particularly popular with German holidaymakers. These sites combine the comfort of a hotel with an original camping experience in a natural environment.

## 3.3.2. The holiday home segment in Germany

In addition to the rediscovery of camping, another holiday trend has emerged due to corona. More and more Germans spend their holidays in a holiday home or apartment. Holidaymakers like having their own space and a safe environment. In addition, in a holiday home with all its facilities, they can provide for themselves. According to Reiseanalyse, in 2022 a total of 27% of holidaymakers stayed in a holiday home or apartment. This is a 3% increase from before the pandemic. In general, the demand for holiday homes and apartments has increased significantly over the past 6 years, as the chart below illustrates.

Chart 18

Interest of Germans in spending their holidays in a holiday home or apartment in the next three years in comparison 2017–2023



Source: Source: RA 2017 - 2023 face-to-face

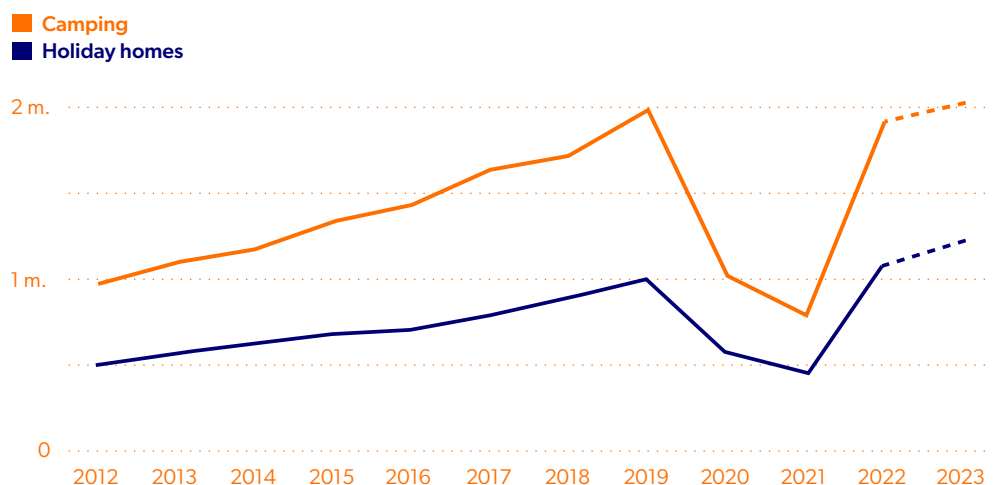
The accommodation sector did experience sharp price increases, not only due to the increased demand, especially in the high season, but also due to the energy crisis. According to a survey by holiday rental company Holidu, 59 % of landlords have increased their prices, by an average of 10%.

### 3.3.3. Holiday home and camping holidays in the Netherlands

The number of German visitors to Dutch campsites was already 10% above the pre-corona level in 2022. A total of 1.1 million German guests visited a campsite in the Netherlands that year. This trend seems to continue in 2023, with 28% more bookings in the first 6 months compared to the same period in 2019. Bookings for holiday homes in 2022 were still 6% below the pre-corona level. However, the first half of 2023 showed an enormous growth of more than 31% German guests in Dutch holiday homes and campsites compared to the same period in 2019.

Chart 19

Number of German guests in holiday homes and campsites



Source: CBS



Photo: Merel Tuk

### 3.3.4. Demand trends for holiday homes and camping holidays in the Netherlands

In our interviews, holiday home providers mentioned some interesting universal trends that have emerged on the demand side in recent years.

With the outbreak of the pandemic, bookings for all providers collapsed completely. It was striking that the holiday home and camping sector in the Netherlands recovered fairly quickly after that. According to Landal GreenParks, the Netherlands was a popular destination, especially after the travel restrictions were lifted. One reason for this may be the housing ban in Germany and other neighboring countries.

#### New target groups

Before corona, regular customers often dominated the customer base of providers of holiday homes and campsites. This changed during the pandemic, when many new customers chose this type of holiday for safety reasons. These first-time guests often became repeat visitors. In addition, there was a shift in target groups. In the past, it was mainly families who booked a holiday home, but nowadays it is also couples, seniors and groups of friends.

Camping is also on the rise, especially for long weekends by larger groups, some of which reserve a whole collection of camping spots. Where it used to be Dutch guests who visited the campsites in large numbers during the long Whitsun weekend, nowadays German guests dominate.

A camping trend that is emerging in Germany and has remained unknown in the Netherlands until now is that one parent takes their children to the campsite. This trend is called father-child camping or mother-child camping.

#### New destinations

But there are also changes in the choice of destinations. During the pandemic, the focus was on nature and proximity. The main attraction of the Netherlands for German visitors is still the coast, but other Dutch destinations have also become increasingly popular, especially for camping holidays and stays in holiday homes.



### Lesser-known regions

The desire to spend time in nature plays into the hands of lesser-known regions in the Netherlands. For example, Friesland welcomed 30% more camping guests in 2022 than in 2019. With an increase in visitors of 26% and 14% respectively, the provinces of North Brabant and Flevoland are among the top when it comes to attracting new guests from Germany.

An important criterion when choosing a Dutch destination is a location nearby water and a range of attractive activities in the area.

### Extension of the holiday season

The favorite holiday season is still summer, during the holidays and long weekends. But even in the months when people used to travel less, there is now a higher occupancy rate, especially in the winter months. However, Christmas remains the holy time, when Germans prefer to spend time with their family under their own Christmas tree (and when the holiday homes are more likely to be occupied by the Dutch themselves).

### Higher quality standards

It is striking that holidaymakers are willing to pay more money for good quality. This is reflected in holiday homes and in the camping industry. German guests are willing to spend more money on a well-equipped, luxury campsite. There are hardly any last minute offers or discounts, because the holiday homes and pitches on a campsite are already fully booked well in advance.

### More bookings, more turnover

The Dutch provider Marveld Recreatie states that 50% more bookings have already been generated for 2023, with an increase in turnover of 85% compared to the same period last year. This clearly shows that more guests are booking and that they spend more money per booking.

Although guests spend more on their accommodation, they are said to spend less on eating out. According to Marveld Recreatie, a drop in turnover has been observed at catering establishments. According to EuroParcs, special and high-quality accommodations are especially popular, such as tiny houses, tree houses, houseboats and cubes.

### Changing booking behaviour

The pandemic acted as an accelerator when it comes to Germans' affinity for online bookings. Germans previously preferred to book through a travel agency, by telephone or fax. According to Marveld Recreatie, 62% of Germans now book their accommodation online. Many providers can only be booked directly through their own booking channels or through special online booking platforms. The increase in last-minute bookings is also striking. For example, the provider Naturhäuschen.de states that bookings used to be made on average 1–3 months in advance, but nowadays only 1–3 weeks before arrival. Another phenomenon is that more bookings come in after a good weather forecast.

### Sustainability

According to Naturhäuschen.de, the desire for sustainable holiday experiences is growing, especially among the target group aged 20–50 years. Proximity is also still relevant. If there is a choice between sustainable and less sustainable accommodation, according to Landal GreenParks, customers are increasingly opting for the sustainable option. Usually, however, parties are not prepared to pay extra for the sustainable option.

### 3.3.5. The holiday home and camping industry's response to the change in demand in the Netherlands

Providers of campsites and holiday homes respond to the more refined wishes and higher quality requirements of their customers. The interior of the holiday homes is becoming more and more luxurious and suitable for year-round occupation. Built-in saunas, whirlpools and fireplaces draw customers in autumn and winter.

In addition to quality improvements, providers take sustainable aspects into account in renovation or new construction projects. For example, heat pumps are installed, sustainable building materials are used, and solar panels are now standard. Landal GreenParks ensures that sustainable standards are met, especially when building new accommodations. Naturhäuschen.de invests a fixed percentage of its turnover in nature projects. This investment now amounts to 2% of sales. In 2024 this will increase to 2.5% and in 2025 even to 5%. EuroParcs strives to take sustainability aspects into account when constructing new holiday parks.

Providers are responding to the increased online affinity of guests with appropriate technology. For example, Landal GreenParks offers guests the option of contactless check-in using their mobile phone. In most restaurants you can order online or with a QR code and here and there the catering staff is supported by robots.

### 3.3.6. Future prospects for the camping and holiday home sector in the Netherlands

The sector is generally optimistic about growth prospects. The camping and holiday home industry is seen as the holiday type of the future, in which sustainability and holidays close to home play an increasingly important role.

Marveld Recreatie expects a further increase in bookings. For 2024, a total of 41% more bookings have already been generated than for 2023. This is a promising prospect. Consumers are expected to find a long weekend in the Netherlands more important than a short holiday by plane. Landal GreenParks is expanding throughout Europe and new destinations are added. Success is also expected at Naturhäuschen.de. The number of homes marketed has increased rapidly in recent years. In 2020 there were 2500 homes, in 2021 the number has risen to 4200 homes and in 2023 it has almost doubled to 8200 homes. The increase in turnover from 2021 to 2022 was no less than 400%.

# 4

## German visitors to the Netherlands

Comprehensive information about the development of German visitor numbers, visitor profiles, travel motives and their booking behaviour.

## 4.1. Development of visitor numbers

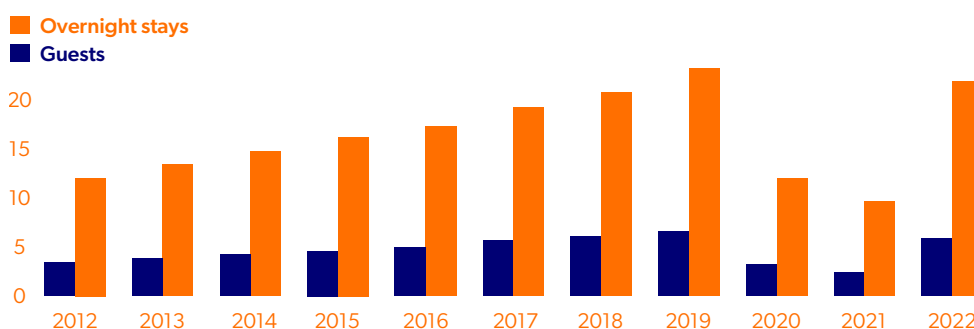
By far the most international visitors to the Netherlands come from Germany. After the corona years of 2020 and 2021, some 5.9 million guests returned in 2022, accounting for almost 22 million overnight stays. This immediately equaled the previous record of 2019.

### Popular for short breaks

The Netherlands is very popular for short breaks. In the Reiseanalyse 2023, the Netherlands ranks second in terms of the share of German visitors, after Austria. For longer holidays, the Netherlands is in 8th place together with Poland (see chart 21).

Chart 20

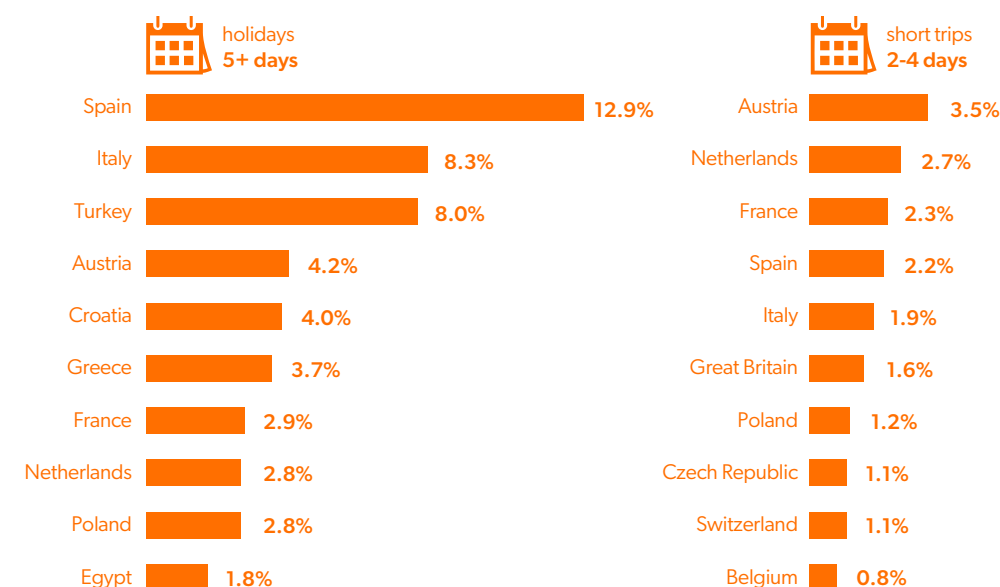
### Development of the number of tourists in the Netherlands



Source: CBS (2020)

Chart 21

### Holiday shares 2022



Source: Travel Analysis 2023. The selection of destinations together does not make up 100%.

### Individual regions and cities

The popularity of the Netherlands as a travel destination is also reflected in the figures for individual regions and cities. The popular coastal provinces are Zeeland, North Holland (including Amsterdam) and South Holland (including The Hague and Rotterdam). But Flevoland, Utrecht and North Brabant are also popular and even registered more overnight stays than in 2019. The period from March (opening of the Keukenhof) to October is the most popular travel time of the year, although people also travel in the other months. The Dutch coastal provinces of

Zeeland, North Holland and South Holland, as well as the large cities of the so-called Randstad, including Amsterdam, The Hague, Rotterdam and Utrecht, account for more than 2/3 of all arrivals and guests from Germany. Limburg, directly adjacent to Nord Rhein Westfalen, is fourth in the provincial ranking.

## 4.2. Visitor profiles

In 2022, NBTC conducted a broad market survey among travelers from Germany to the Netherlands (OIT 2022, NBTC). Some results of this research are quoted and analyzed in the text below. In total, more than 5,000 people were questioned, mainly from NRW and Lower Saxony (50%).

### Motive

Relaxation, escape the familiar environment, and spending time with family and friends are the main motivations for Germans to travel to the Netherlands. It is striking that the local culture and uniqueness of the Netherlands is less of a travel motive for the two border states than for all other visitors from Germany.

Table 2

	Total NRW + LS	Total other
Total	N=2500	N=2394
Relax, rest, switch off	38%	33%
Escape the familiar surroundings	20%	19%
Local culture and unique experiences	8%	15%
Quality time with family/ friends	13%	15%
Meet new people	4%	4%
Getting to know myself better	6%	6%
Shopping	8%	5%
Learning, education	1%	1%
Improving vitality/ health	2%	1%

Source: NBTC OIT 2022

Table 3

	NRW	Lower-Saxony	Total other
Total	N=1842	N=642	N=2380
Active or sports holiday (e.g. cycling, hiking)	5%	4%	3%
Sea/coastal holiday	34%	19%	19%
City break or city trip	21%	29%	36%
Nature holiday	10%	15%	12%
Cultural holiday (e.g. visiting museums, events)	4%	4%	6%
Entertainment (e.g. visit to an amusement park, shopping)	7%	9%	7%
Round trip	2%	2%	2%
Visit to or holiday with family, friends, acquaintances	5%	10%	8%
Relaxation	11%	7%	6%

Source: NBTC OIT 2022

### Accommodations

This is also reflected in the chosen accommodation type. Nearly 10 million overnight stays were recorded by the holiday home sector, followed by hotels/guesthouses with around 6.3 million and the camping sector with 5.3 million overnight stays.

### Duration and holiday type

The average length of stay of German guests in the Netherlands increased slightly to 3.7 nights in 2022.

The driving force behind this development is the camping sector, which not only registered almost 100 thousand more guests in 2022, but also almost 500 thousand more overnight stays than in the year of comparison 2019. Camping and the associated 'holiday in and with nature' is a trend that has gained momentum due to the pandemic and from which the Netherlands as a destination is now benefiting.

### Group size

The average group size of travelers from Germany is 2.8 people. About 15% travel alone; travel groups consisting of 2 people form the largest group with approximately 42%, followed by travel groups consisting of 3 to 4 people with a share of just over 30%. The partner and children or other family members are usually the traveling companions with about 75%, before friends, who have a share of just under 25%.

### Destination and means of transport

What the Baltic Sea is to Berlin (proverbially the 'bathtub of the Berliners'), the Dutch North Sea coast is for NRW and Rhineland-Palatinate; for them the North Sea is easier and faster to reach than the German coast. From all other federal states, city trips are the most common reason to travel to the Netherlands.

This is also reflected in the chosen means of transport. Due to the direct proximity of the Netherlands, the car is far ahead in the three federal states of North Rhine-Westphalia, Lower Saxony and Rhineland-Palatinate with an average of 75%. In addition, about 5% travel by caravan or motorhome. The railways have a share of about 12%. The plane as a means of transport only plays a role in Berlin (about 20%), Baden-Württemberg (13%) and Bavaria (12%). However, in these three states rail is also at a higher level at just under 18%.

## 4.3. Information and booking channels

The number of people who spontaneously travel to the Netherlands without making any reservations beforehand is high. According to the Reiseanalyse 'Trend Study 2030', the average figure for all destinations is 12%. In the NBTC market research, 17% of respondents said they had not pre-booked accommodation or transportation. With 5.9 million travelers, this means about 1 million travelers who spontaneously traveled without making a reservation in advance.

This survey also shows that about 42% of the respondents decide to travel to the Netherlands in the very short term - within 14 days before departure: NRW/Lower Saxony 46%, other federal states 38%. Another 22% book about a month before departure, almost 20% book up to two months before departure and the rest book more than three months before departure.

At the same time, the spectrum of information and booking channels among those who booked in advance is very diverse, as the two tables show.



Table 4

### What sources of information did you use to prepare for your visit to the Netherlands?

	Total NRW + LS	Total other
Website with reviews from other travellers (e.g. Trivago)	10%	9%
Search engine (e.g. Google)	32%	34%
Travel agency - tour operator	7%	10%
Social travel sites (e.g. Airbnb)	8%	8%
Holland.com	10%	11%
Social media e.g. Instagram, Facebook	18%	16%
VVV Netherlands	6%	5%
Directly with the transport company	3%	4%
Directly with the accommodation	19%	16%
Travel and leisure websites with information about the country or type of holiday	10%	14%
Blog/ Vlog	5%	6%
Friends/family/acquaintances/colleagues	26%	28%
Travel guide/brochure/brochure	10%	16%
Article in newspaper/magazine	5%	10%
Radio	5%	5%
From experience/ already known	22%	16%
No sources used	8%	7%
Total	N=2575	N=2502

Source: NBTC OIT 2022

Table 5

### With which provider did you book or reserve your (main) accommodation?

	Total NRW + LS	Total other
Directly with the accommodation	50%	42%
via a travel agency or tour operator	13%	19%
via a booking website (e.g.) booking.com or Airbnb)	32%	32%
via e.g. a tourist office	2%	3%
Total	N=2135	N=2084

Source: NBTC OIT 2022

Not surprising, but striking, is the high number of returning visitors who do not use any information sources. About a third of the travelers from NRW/Lower Saxony belong to this group and almost a quarter from the rest of Germany.

This finding is also reflected in booking behaviour. About half of the travelers from NRW/Lower Saxony book their stay directly with the accommodation and 13% use a travel agency or tour operator. In the other federal states, the share of travel agency/tour operator is significantly higher at 19%. The OTA market receives about a third of all bookings to the Netherlands.

### Reasons why travellers choose booking channels

The chosen booking channel essentially depends on three factors: the complexity of the journey, the destination, and the desire for security/flexibility.

### Influence of pandemic

The latter factor received a significant boost because of the pandemic. Thousands of holiday-makers were stranded at their holiday destinations or had to postpone their holidays when the first lockdown was announced. Travel agents as intermediaries, or even tour operators, provided essential assistance in this regard. Tour operators make sure that the traveler feels taken care of from the beginning of the holiday to the end. There is always a contact person and care is provided in case of an emergency.

In addition, German tour operators are required by law to provide proof of security. In the event of bankruptcy of the organizer, the consumer must either get his money back through insurance or have a guarantee that he can return home free of charge after the start of the trip.

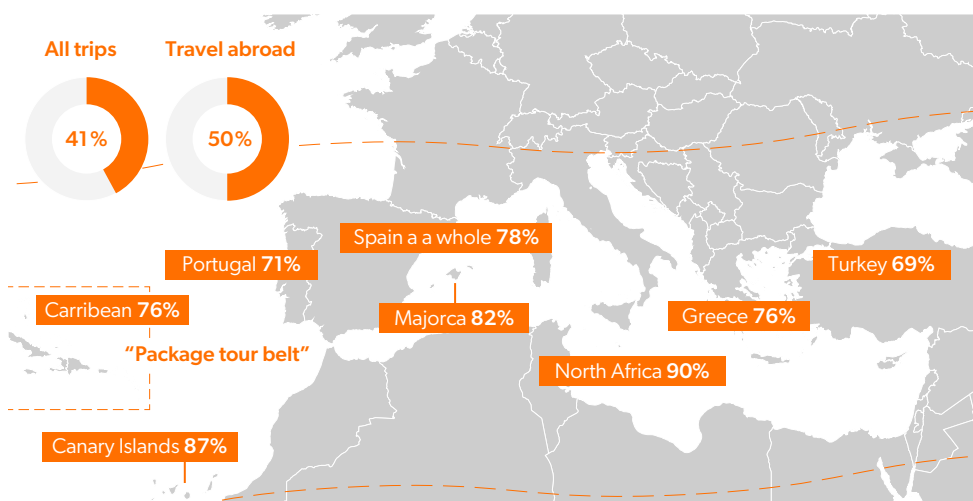
For less complex trips and for nearby destinations, the expertise of a tour operator is not easily required. OTAs are exceedingly active in this segment. In addition, many travel products are now booked directly with the provider, online, by e-mail or still by telephone.

### Group travel

Group travel is becoming increasingly complex. Tour operators and travel agencies are used much more often in this segment. Coach tour operators form the largest segment here. They have therefore specialized in different topics: youth groups, seniors, culture travelers, sports travelers, etc.

Chart 22

### Highest share of package tours in 2019



Holidays (5 days or more), in %, \*Caribbean incl. South-/Central America, \*\*North Africa = Morocco, Algeria, Tunisia, Libya, Egypt  
German resident population aged 14 and over, RA 2020 face-to-face

## 4.4. Best role for NL tour operators

Many tour operators and OTAs operate demand-driven. As a result, their range mainly consists of offers in the larger cities, along the coasts of Zeeland, North and South Holland and around the IJsselmeer (see chart 23). The east and south-east of the Netherlands are clearly under-represented, with the exception of larger cities such as Arnhem, Eindhoven or Maastricht.

Chart 23

### Screenshot

#### Tolle Angebote für Deinen Urlaub in den Niederlanden

Kein Trubel, kein Stress, einfach nur eine erholsame Zeit und jede Menge toller Erinnerungen. Mehr willst Du von einer Reise nicht? Dann mach in Holland Urlaub, besuche die Küste des Landes und genieße die Ruhe des Meeres. Die wunderschönen Landschaften, reizvolle Städte, Windmühlen, Käse oder die farbenprächtigen Tulpen. Unsere Nachbarn warten mit wunderschönen Ferienorten auf und laden zu zahlreichen Ausflugsmöglichkeiten ein. Erlebe die Niederlande mit TUI und checke in einem der zahlreichen Hotels ein. Oder entdecke unsere vielfältigen Angebote für Städtereisen, z.B. in einem [Amsterdam Kurzurlaub](#).

#### Lange Sandstrände für Deinen Sommerurlaub

Super Last Minute Urlaub in den Niederlanden


[Jetzt entdecken](#)

#### Beliebte Urlaubsziele in Holland



Booking.com offers by far the largest selection of accommodations in the Netherlands. All regions are represented, with a focus on the major cities and the coast, as described above.

Open to more variety

For a long time, tour operators and wholesalers only brought itineraries with the classic icons of the Netherlands: Amsterdam with its canals, the Keukenhof, windmills along the Zaanse Schans and Alkmaar with its cheese market. But it is precisely in this segment that the greatest change is currently taking place. The public is increasingly open to inspiration, and they are looking for more variety and also more activities. Art and culture, cycling and walking are thus becoming more prominent and are offered more often, as the example below from TUI shows (see Chart 24).

Chart 24

Screenshot

Weitere Urlaubsregionen in den Niederlanden



1	Seeland   1 Nacht   Frühstück Fletcher Zuiderduin Beachhotel	****	p.P. ab 31 €
2	Friesland   1 Nacht   ohne Verpflegung Oranje Hotel Leeuwarden	****	p.P. ab 40 €
3	Amsterdam & Umgebung   1 Nacht   ohne Verpfle... Hotel van de Vijzel	****	p.P. ab 49 €
4	Südholland   1 Nacht   ohne Verpflegung Room Mate Bruno	****	p.P. ab 54 €
5	Südholland   1 Nacht   ohne Verpflegung Inntel Hotels Rotterdam Centre	****	p.P. ab 55 €

**FRIESLAND | LEEUWARDEN**

- Wunderschöne Natur mit zahlreichen Seen & Wassersport
- 4 Nationalparks mit Wander-, Rad- & Wasserwegen
- 11 kulturhistorische Städte und Dörfer
- Leeuwarden: 800 Denkmäler, moderne Architektur & urige Shops

**Friesland - Eines der besten Reiseziele**

Friesland steht für endlosen Horizont, frische Luft und sauberes Wasser. Tief einatmen und genießen. Oder aktiv werden: Friesland ist bekannt für sein umfangreiches Wassersportangebot, das von Bootfahren und Wasserski bis zu Angeln und Kitesurfen reicht. Lonely Planet, National Geographic und die New York Times zeichneten Friesland als eines der besten Reiseziele aus.

**WATTENMEER**

- UNESCO Weltnaturerbe Wattenmeer
- Geschichte der Gewinnung von Marsch- und Sumpfgebieten erleben
- Sehr gut ausgebaute Wander- und Fahrradwege
- Vielzahl an Fischrestaurants und lokalen Produzenten entlang der Küste

**Wattenmeer - Weite Ruhe**

Im Norden der Niederlande liegt mit dem UNESCO-Weltnaturerbe Wattenmeer der größte Naturschatz der Niederlande. Vor allem die Küstenregionen der Provinzen Nordholland, Friesland und Groningen bieten ihren Besuchern spannende Aktivitäten rund um das Watt. Urlauber finden hier Weite und Ruhe, sowie einen Mix aus Natur, Kulinarik und Aktivreisen.

# 5 SWOT

**An analysis of strengths, weaknesses, opportunities and threats of destination the Netherlands.**

## SWOT

The Netherlands offers some very valuable conditions to be considered a particularly attractive destination for the German market. This is the opinion of both the consumer and the travel industry. In addition to these strengths, the following SWOT analysis also shows weaknesses that are mentioned repeatedly.

Furthermore, the corona pandemic has crystallized many opportunities for a future with an even wider and more attractive offer. But where there are opportunities, there are also risks, which must be recognized at an early stage to guide them in the right direction.

### + Strengths

From a travel industry perspective, the Netherlands has a wealth of strengths:

- The proximity to Germany makes travelling very flexible and sustainable.
- Good infrastructure (car, train to larger cities and plane).
- A large offer is presented in a small space – both in terms of accommodation and experiences.
- A wide range of natural and cultural attractions is present.
- The Netherlands is considered a safe destination and has a positive image in Germany.
- There is a suitable product for all target groups, so that school classes as well as families, couples, singles, and senior citizens can get their money's worth.

### — Weaknesses

- The price/quality level, especially in the hotel sector, is often worse for German buyers than in Germany or other comparable destinations.
- The supply of accommodation in Amsterdam and on the coast is very limited in the high season.
- The infrastructure in rural regions still has potential for development.
- The pandemic has also led to a shortage of skilled workers in the HORECA sector in the Netherlands.

### 💡 Opportunities

- The market for short breaks is growing in contrast to longer trips, which remain at a constantly high level. This may also lead to increased demand for the Netherlands, which in turn may lead to an expansion of supply on the part of tour operators.
- Accommodation in rural regions is increasingly seen as an alternative by the travel industry (hotels in the 2nd row).
- An extension of the season is possible - especially in popular regions, where the quotas are then available at lower prices.
- Themes such as 'active in nature' and cycling are becoming increasingly popular and can be ideally complemented by the Dutch tour operators' offer.
- Camping and holiday home holidays are a trendy topic from which tour operators can also profit more - especially regarding the topic of sustainable travel.

### ⚡ Risks

- Many Dutch regions are unknown, so the selection of offers focuses exclusively on the large cities and the three coastal provinces.
- Accommodation in popular regions (e.g. coast, Amsterdam) is increasingly marketing itself, leaving the travel industry with no quota.
- There are only a few really large accommodation providers with corresponding contingents, so the travel industry has to rely on many "small" partners, which in turn takes more time.
- The accommodation providers are not willing to pay an advertising cost subsidy (WKZ) or a commission, as is common with many FITs.
- As soon as demand from distant destinations such as North America and Asia picks up, price levels will rise, which is why German tour operators (might) withdraw from the market.



# 6

## Summary

This Travel Trade Scan provides insight into the development of the German travel industry in general and the Netherlands in particular.

In addition to current facts and figures, this Trade Scan contains a new chapter on trends.

Digitization and sustainability are cross-sectoral themes that are also important for the travel market in the Netherlands. In addition, the camping and holiday homes segment in particular was analyzed, as a trend seems to be developing here that could give tourism in the Netherlands an enormous boost.

COVID-19 accelerated an already initiated change in booking and travel behaviour. The trend towards online booking is unstoppable and online platforms (OTAs) and classic providers offering online booking channels and information will continue to benefit. More complex trips and group trips, on the other hand, are still booked through travel agencies or tour operators.

The Netherlands is currently benefiting from the increasing demand from Germany. In addition to the coastal regions and the large cities of the so-called Randstad, more and more visitors are flocking to the lesser-known provinces. On the one hand because of the desire for more nature and on the other hand because of the increased interest in higher quality camping and holiday accommodation.

However, there are still steps to be taken to include just these regions in the tour operators' programs and to make Dutch partners aware of the needs of German visitors.

NBTC responds to precisely these opportunities to bring Dutch and international partners from the travel industry together in the core markets.

Interviews were conducted with a total of 4 partners on the trend topic of camping and holiday home holidays:

Landal Greenparks  
EuroParcs  
Marveld Recreatie  
Naturhäuschen.de