

## TOPLINES



### **Starting Point (January 2020):**

*Holiday demand in 2019 at record level - holiday plans for 2020 at the very high level of previous years. Then came Corona. Lockdown from mid-March to mid-May - this is the period in which about 15% of holidays are normally taken. This volume is probably irretrievably lost. Now a slow start to domestic tourism - travel in Europe will be possible from mid-June at the earliest and then probably not to all countries for the time being.*

### **Results in the Corona survey of the Reiseanalyse online in May 2020:**

*(2,500 online interviews in the period May 7<sup>th</sup>-15<sup>th</sup>, representative for the German-speaking population in Germany, aged between 14 and 75 years):*

- *Nearly 60% of the Germans currently feel affected by the Corona crisis. They are either a risk group, have financial losses, are affected by short-time work, fear for their jobs or had to reduce holiday time and overtime during the lockdown period. Only a very small proportion were affected by the disease itself (self-inflicted, in quarantine or looking after relatives).*
- *Nevertheless, the topic of holiday travel continues to be very important for many Germans:*
  - *For over 80%, the feeling of being able to travel freely at any time is important [TOP3 boxes].*
  - *For almost 50%, holidays are an essential part of happiness and well-being [TOP2 boxes].*
  - *On the other hand, about 50% say that they can easily do without a holiday trip for a year [TOP2 boxes].*
- *The vast majority of Germans say that they can afford a holiday trip in the remaining year 2020 and would have the time to do so. Two important preconditions are therefore met. These figures are almost on the same level of November 2019, when we asked the same question!*
- *In terms of the actual holiday desire and holiday plans for June-Dec. 2020, the market roughly is divided into three parts: A good third have fixed holiday plans, another third are unsure if/how/where they will go on holiday, the last third almost certainly do not want to go on holiday in 2020.*
- *The requirements for future holiday trips are of course shaped by the Corona crisis:*
  - *Hygiene at the destination and in the accommodation is indispensable*
  - *You make sure that you can go home quickly when in doubt*
  - *One shuns close contact with strangers*
- *This results in different strategies to ensure this:*
  - *You go with a tour operator who supports you in an emergency*
  - *You go to a destination you know*
  - *One prefers accommodation without much contact with others (e.g. holiday flat or caravan)*
  - *People prefer individual means of transport, e.g. their own car*
- *This also explains the ranking of planned destinations for 2020, in which earthbound destinations perform relatively better than the long-term average:*
  - *Germany far ahead of Italy, Austria, Spain, the Netherlands, France, Denmark and Greece.*
- *The forms of holiday also fit the current requirements and preferences:*
  - *Relaxing before a beach holiday, family holiday, nature holiday and active holiday.*

*If the framework conditions are right and the rules allow it, the outlook from the demand side is therefore cautiously optimistic for the remaining year 2020 – for the German tourism demand in total and for the destination Italy, specifically.*