Travel Trade Scan Germany 2024

NBTC
Nederlands Bureau voor Toerisme & Congressen

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Travel Sector Overview

Despite recent global turbulence caused by a pandemic, financial and economic crises and even military conflict and natural disasters, holidays remain at the top of the priority list of Germans.

The corona pandemic led to a sharp decline in travel spending, which let into challenging years for the travel industry. The recovery commenced in 2022, albeit with certain travel restrictions still in place. By 2023, the travel sector had surpassed pre-pandemic figures significantly. Travel spending increased by approximately 27 %, reaching a new record of € 79 billion. Travel agencies and tour operators mainly saw a strong demand for package holidays.

In 2023, Germans took a total of 139 million holiday trips, of which 65 million were trips lasting five days or more. That is more than in the previous year and only slightly less than in the pre-corona record year of 2019. The number of short holiday trips by the German population (lasting between two and four days) was around 74 million.

Despite the recovery, turnover in 2022 at € 28.5 billion was still far below the pre-corona level of 2019 (€ 35.4 billion). In 2023, the tour operator market really recovered when total turnover increased to 37.3 billion euros.

In 2023, the duration of a trip had an average of 13.1 days. This is significantly longer than in 2022 (12.6 days) and also longer than in 2019 (12.4 days). This is primarily because the group of travellers aged 60 and older is growing. This group has more time to travel.

Germans' holiday plans for 2024 show that 73 % of the population plans to travel again this year. 41 % of the Germans who plans to travel has already decided on the destination, whereas for 32 % the destination is still open.

2 Travel Trade Sector Overview

2.1 General market development and demand

This market analysis exists of two phases of the market developments between 2022 and 2024.

The German tourism market is divided into three primary segments:

1. **Service providers, encompassing hotels, airlines, railways, car rental companies, and long-distance coaches.**
2. **Travel agencies and tour operators, further divided into Free Independent Travellers (FIT), package tour operators, and group tour operators.**
3. **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.

In 2023 there were 7.2 million German visitors in the Netherlands. Compared to 2019, this represents an increase of around 6.2 million German guests (+16.4%). The number of overnight stays by German visitors was 26.8 million in 2023, an increase of 24 % compared to 2019.

2024

In the first four months of 2024 there was an increase of 4.9% of German visitors in the Netherlands and 5.5% more overnight stays compared to 2023. According to NBTC's forecast of January 2024, the Netherlands could this year welcome a total of around 7.5 million German overnight guests.

Favourite destinations

The Netherlands has been listed among the top 10 foreign destinations for years, and in the top 5 for short breaks. In 2023, the provinces of North Holland, Zeeland and South Holland generated the most arrivals. However, if you compare the percentage increases compared to 2019 Utrecht, North Brabant, Overijssel and Flevoland show the biggest increase.

Visitor profiles and preferences

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

46 % of all overnight stays are spend in holiday homes, which makes it the preferred choice of accommodation. The camping sector showed the biggest increase, with over 1.6 million overnight stays in total.

The German holiday travel market is evidently recovering from the COVID-19 pandemic. After travel spending plummeting in 2019, followed by two more difficult years, the recovery of the travel industry began in 2022, with restrictions on travel still in place. 2023 is the first travel season since the pandemic to close well above the pre-pandemic figures.

German travel spending rose by around 27 % to a new record of 79 billion euros. Travel agencies and tour operators benefited from the strong demand for package holidays:

47 % (€ 37.3 billion)
Tour operators/travel agencies
(Organised tours).

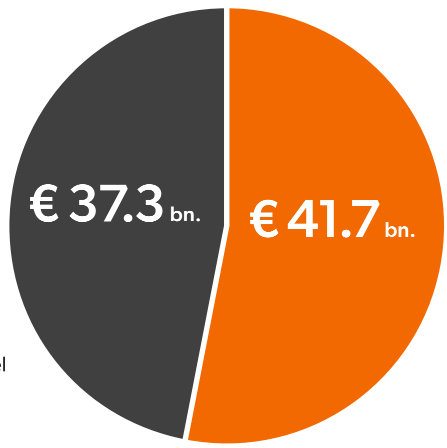
53 % (€ 41.7 billion)
Service providers/product portals
(Individual travel).

The entire market for leisure travel

Turnover from all pre-booked trips with one overnight stay or more in the tourism year 2023

Organised trip (tour operator)
47 %

Individual travel (service providers / product portals)
53 %



At 30.8 %, organised travel grew more strongly than self-organised individual travel, which increased by 23.7 %, thus gaining market share.

Individual trips are usually booked online, by phone or by e-mail with portals, airlines, railways, and accommodation).

2.2 Forms of travel trade

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 categorised into the following groups:

- **For Individual Travellers (FIT):** Specialised tour operators catering to individual travellers.
- **Group travel companies** that acquire sizable allocations and subsequently resell them to groups of travellers, 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 coordinate between travellers and travel suppliers, offering expertise and convenience by coordinating and organising 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 › l'tur, lastminute.de, restplatzboerse.de

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

Family holidays › 1-2-Fly, Tropo, ITS

Discounters › ALDI 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, Eurostar

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

Group travels › CTS Reisen, Behringer Touristik, Alpetour

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

2.3 The tour operator market in the D-A-CH region

Table 1 illustrates the distinct trajectories that various individual tour operators have followed from 2021 to 2023. The business of travel professionals thus accounted for 47% of total expenditure. This is significantly more than in the years 2020 to 2022, which were characterised by a high proportion of individual travel in Germany and neighbouring countries due to the pandemic. However, the position of 2019, when organised and individual travel accounted for equal shares of sales, has not yet been reached again.

The major tour operators in particular (with the exception of FIT) are performing well above their 2019 turnover, which is partly due to the fact that the turnover of Thomas Cook and its main brand Neckermann is spread across the market. It appears that Schauinsland, Alltours and Vtours in particular, benefited from the demise of the former number two.

Furthermore, two notable trends emerge: Firstly, it is evident that many specialists such as tour and study tour operators as well as long-distance travel specialists, have again achieved double-digit sales growth after the difficult pandemic period. Secondly, there are indications of a comeback in cruises: not only did Aida and TUI Cruises post strong growth last year, but Phoenix Reisen, Plantours and 1A Vista also recorded double-digit growth.

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 2022/23	Change	Turnover 2021/22	PAX 2022/23	Change	PAX 2021/22
1	TUI	6,400.0	+25,5 %	5,100.0	n.a.	n.a.	5,800 k
2	DER Touristik	3,481.0	+16,0 %	3,000.0	3,190 k	-0.3 %	3,200 k
3	FTI Group	3,160.0	+6,8 %	2,960.0	3,750 k	+4.2 %	3,600 k
4	Aida Cruises	2,300.0	+67.9 %	1,370.0	n.a.	n.a.	n.a.
5	Schauinsland-Reisen	2,150.0	+15.6 %	1,860.0	1,880 k	+6.8 %	1,760 k
6	Alltours	1,995.0	+7,0 %	1,864.0	1,955 k	+0.3 %	1,949 k
7	Hotelplan Group	1,850.7	+20,6 %	1,534.4	n.a.	n.a.	n.a.
8	TUI Cruises	1,823.0	+47,0 %	1,240.0	639 k	+28.9 %	496 k
9	Volume T.O. Hotelplan Group (Vtours)	917.1	+22,0 %	751.9	n.a.	n.a.	n.a.
10	Anex Gruppe	570.0	+56.2 %	365.0	649 k	÷44.2 %	450 k
11	Ferien Touristik/Coral Travel	507.6	+43.4 %	353.9	531 k	+24.1 %	428 k
12	Interhome Group	416.7	+5,0 %	396.7	n.a.	n.a.	n.a.
13	Phoenix Reisen	403.8	+32,0 %	305.8	178 k	*14.8 %	155 k
14	LMX Touristik	315.8	+24.7 %	253.2	428 k	+12.6 %	380 k
15	Hotelplan Suisse	243.5	+43.9 %	169.2	n.a.	n.a.	n.a.

Source: FVW Tour Operator

2.4. 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 not only attributed to the increased online activity of tour operators, but also to the emergence of OTAs. Nevertheless, the total travel agency turnover, including business travel, rebounded to around 20.7 billion euros in 2023.

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.

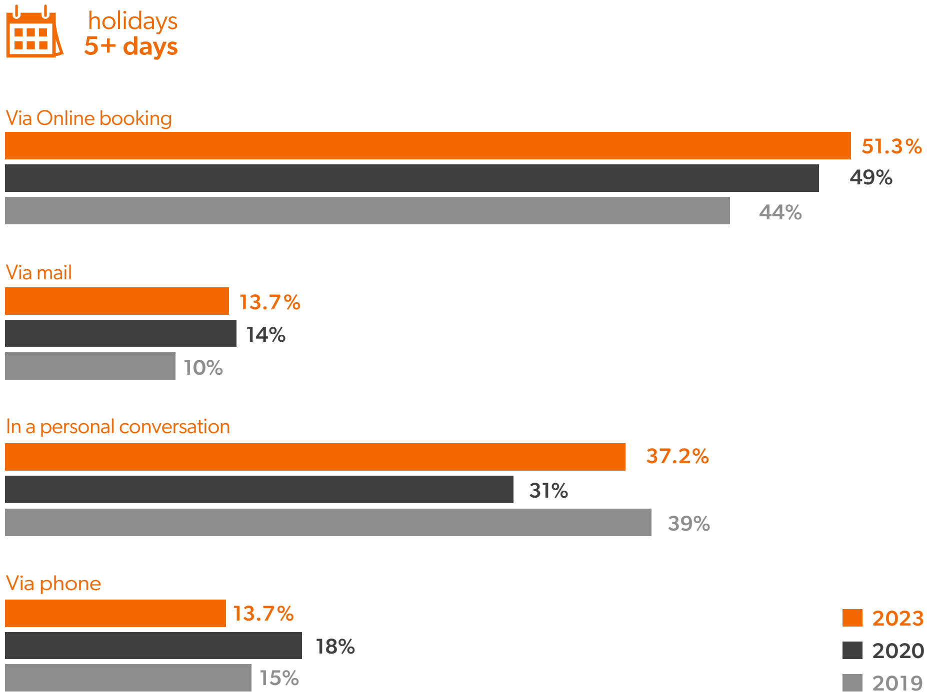

Photo: Aranka-Sinnema

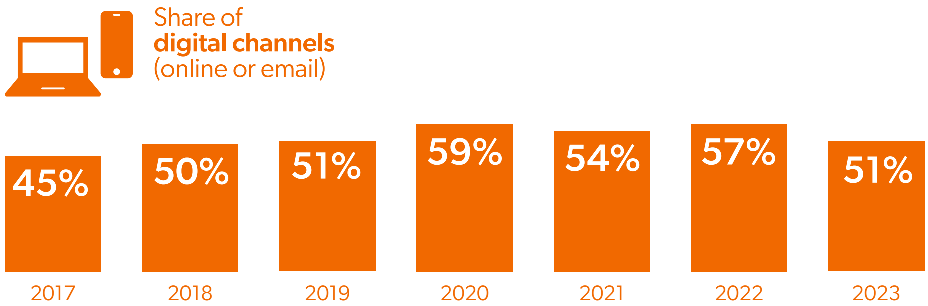
2.5. OTAs in Germany

The OTA market in Germany is experiencing continuous growth, with the ongoing digitization process further amplifying this trend. As per the Reiseanalyse, in 2023 over half (51%) of all holidays lasting more than five days was reserved online (refer to chart 3).

Chart 3

Booking channels for holidays

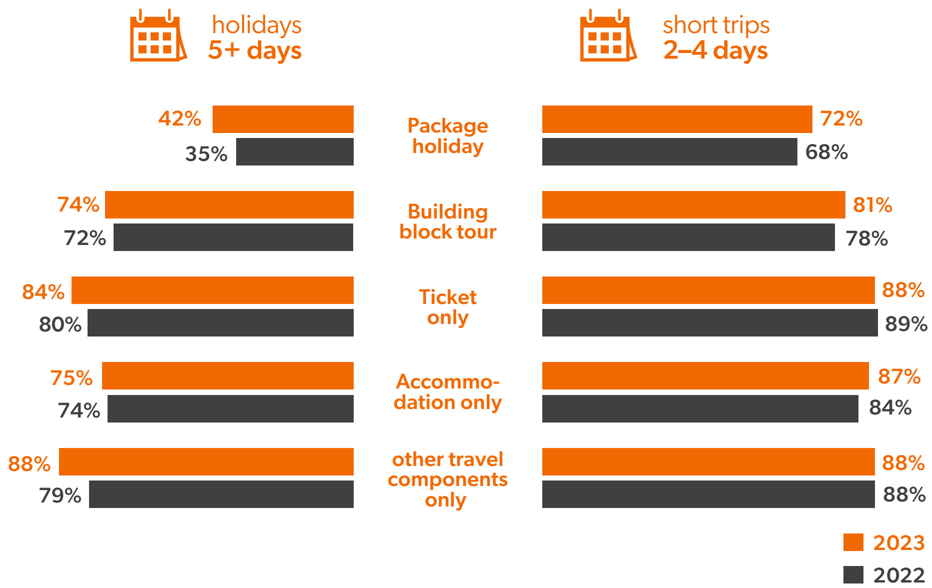




In Germany, the type of holiday significantly influences the choice of booking channel. Package holidays are frequently booked at traditional travel agencies. Conversely, digital booking platforms have become predominant for individual services like transportation, accommodations, and other travel components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

Chart 4

Share of bookings via digital channels by travel organisation



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 are currently 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 three years, Trivago more than doubled its revenue, from 205 million dollars in 2020 to 523 million US dollars in 2023.

More and more tour operators are partly dependent on online distribution channels. But there are still a few large platforms that act as online intermediaries as their core business. 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 and the rating portal holidaycheck.de, are other major parties. In recent years, TUI has increasingly focused on strengthening its own online channel and 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. Based on a study by fvw/TravelTalk in December 2022, the following ranking was revealed:

The five leading online distributors in Germany
Ranking according to turnover

1. **booking.com**
2. **Check24**
3. **TUI.com**
4. **Invia/ab-in-den-urlaub.de**
5. **Holidaycheck**

Source: FVW Tour Operator

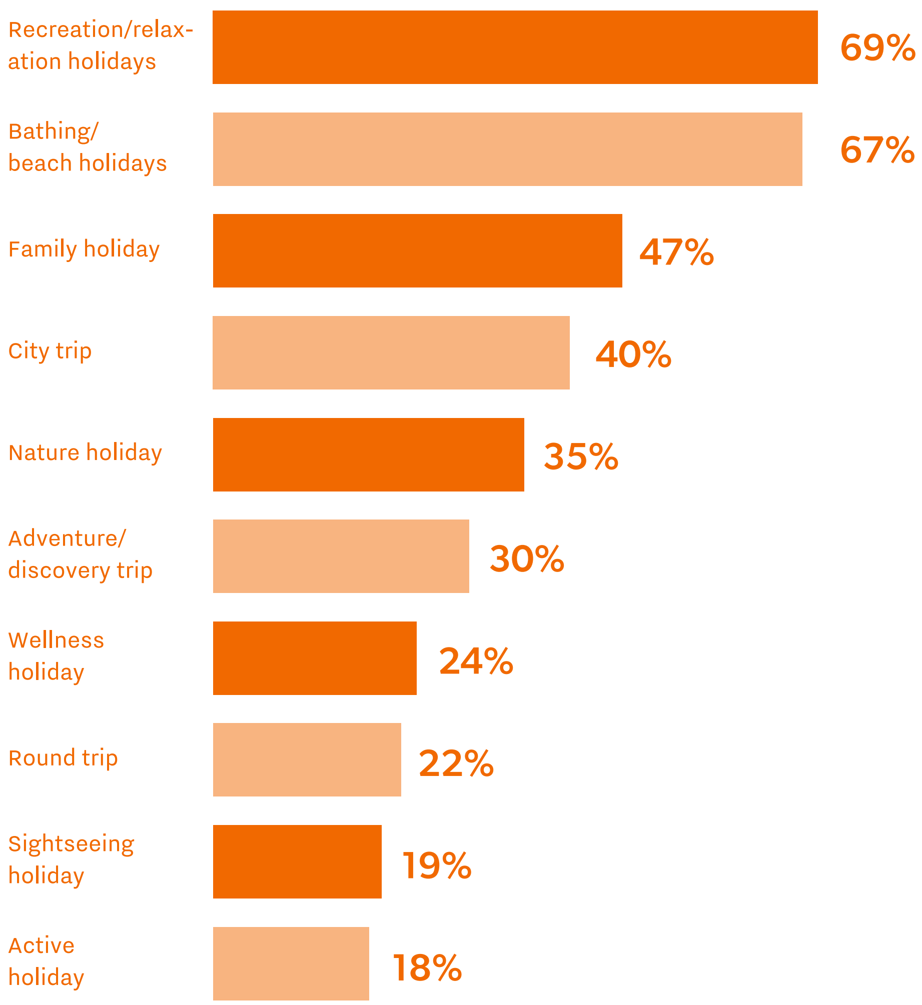
Numerous OTAs utilise multiple platforms to distribute travel services. A concise overview, though not exhaustive, of OTAs active in the German market is below:

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.de
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

2.6. Holiday types

When it comes to booked holidays, a differentiation can be made between longer holidays (five days) and shorter breaks (two to four 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 COVID-19 pandemic has spurred a surge in interest for nature-based and active holidays

Types of holiday travel in 2023



Longer trips

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

1. Escaping daily routine (69%)
2. Seeking sun and warmth (69%)
3. Aiming for enjoyment and fun (65%)
4. Craving relaxation (64%)
5. Recharging and gaining fresh energy (64%)

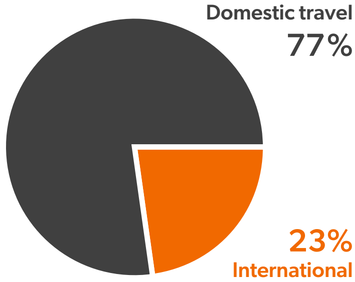
Short breaks

A different picture emerges regarding 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 travellers form the largest group in this segment, but cities are also very popular with groups.

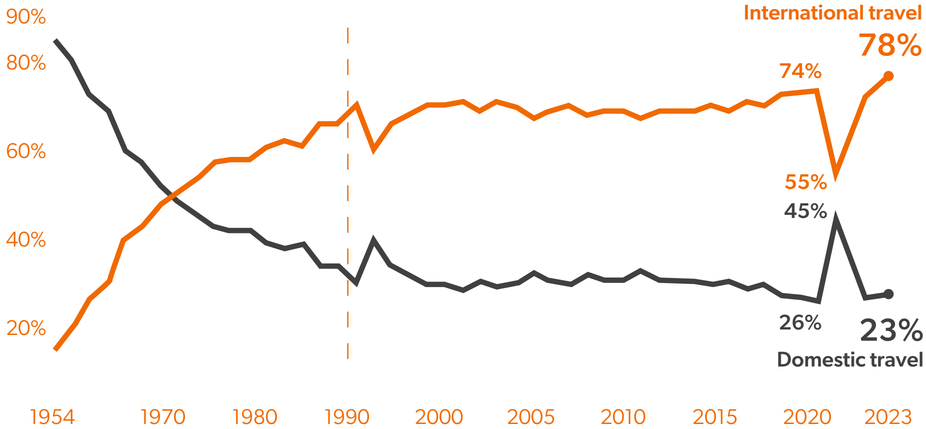
Domestic travel vs. travel abroad

Travelling abroad will continue to be a clear trend in 2023. At 78% of all holiday trips, their share is higher than ever. At the same time, the market share for domestic trips will fall to 22%, meaning that foreign destinations will account for almost 51 million holiday trips in 2023, almost 1.5 million more than in the previous year and a good 1 million fewer than in 2019. Germany is by far the number one holiday destination despite its loss of market share, although there will be a decline of just over 3 million holiday trips compared to 2022. Of the short holiday trips in 2023, just under 80% were domestic, similar to 2022 and 2019.

short trips
2–4 days



holidays
5+ days



2.7. Trends and booking behaviour

Online Travel Agent (OTA)

Among Germans the Netherlands is the most digitally booked destination. In 2023 59% of all holidays lasting more than five days were booked online. For short breaks, the digital share is even higher; 82%. For travellers, the choice of booking channel depends on two key factors:

- **the complexity of the trip**
- **the destination.**

For less complex 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 and/or review sites and consulting travel agencies by phone and/or email for advice. But their ultimate booking might involve a different channel alltogether.

Younger travellers still increasingly prefer digital bookings. But even among 50–69-year-olds digital bookings exceed bookings via analogue channels. This demonstrates the steadily growing importance of digital channels.

Scale and expenditures

In terms of tour operator sales, there is still a clear trend towards market dominance through size. Together, the ten largest tour operators in the D-A-CH region (Germany, Austria, Switzerland) accounted for around 75% of total sales in 2023.

As Germans spend more money on their holidays the turnover of funds is now higher than before the pandemic. The average spend per person per year was 1,032 euros in 2019, rising to 1,337 euros in 2023. Total expenditure grew to 86.9 billion euros. This is a remarkable increase compared to the 73.1 billion euros in 2019.

Beach and nature

For Germans, extended holidays (five days or more) predominantly revolve around beach and nature getaways, often enjoyed with family members. Mediterranean destinations, particularly Spain, hold a steadfast appeal. Within this category, package tours continue to enjoy popularity, frequently arranged through prominent FITs (individual travel providers).

The camping and caravanning sector has undergone a significant surge, particularly when paired with nature-based activities like hiking and cycling. Active getaways are also gaining popularity, particularly among the younger demographic. Additionally, city and cultural excursions are noteworthy, often arranged individually through OTAs. Amid the pandemic, the cruise industry experienced substantial setbacks. Nevertheless, it is currently experiencing a swift resurgence.

Key Insights

More detailed insights into the travel and booking behaviour of Germans can be found in our publication → *Key Insights Germany*.

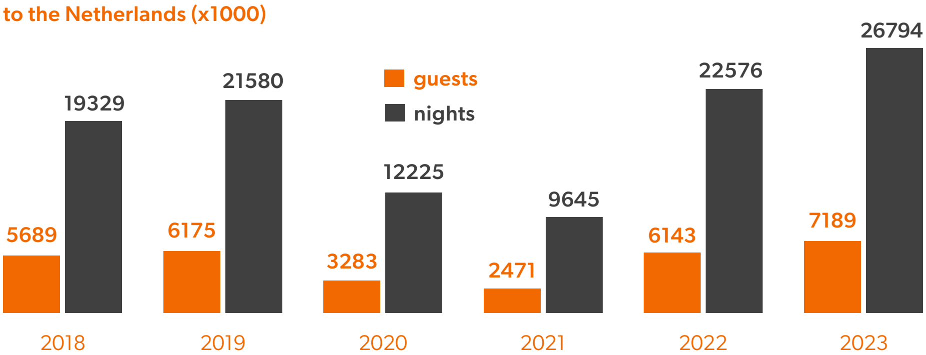
3 German visitors to the Netherlands

3.1. Travel behaviour of Germans to the Netherlands

This section presents the key facts of German travel behaviour to the Netherlands to provide an understanding of how tour operator supply responds to consumer demand (as described in the following chapter). Detailed insights into the travel and booking behaviour of Germans can be found in → *Key Insights Germany*. This document contains information on when and how long Germans travel, when they book, what their travel motives are, who they travel with and much more.

At a glance: Facts and figures on German tourists travelling to the Netherlands
Germans' desire to travel to the Netherlands continues unabated and has already exceeded the volume of 2019, before the pandemic. In 2023, a total of 7,189,000 German guests visited the Netherlands, recording 26,794,000 overnight stays. In comparison, before COVID-19 there were only 6,175,000 German guests who spent 21,580,000 nights in the Netherlands. These figures not only show an increase in demand, but also an increase in the length of stay of German travellers in the Netherlands.

Development of german overnight visitors to the Netherlands (x1000)



With regard to the destinations of German tourists in the Netherlands, 63% of overnight stays are concentrated in just three provinces: Zeeland, North-Holland and South-Holland. This indicates that demand is mainly geared towards coastal holidays, while the focus for city holidays is on Amsterdam, followed by The Hague and Rotterdam. The other nine provinces have correspondingly fewer visitors.

Another trend can be seen in the types of accommodation. A total of 2,454,000 visitors stayed overnight in a holiday home, which represents growth of 24% compared to 2019. The camping sector recorded the largest increase, with 1,298,000 guests and growth of 30% compared to 2019. This development benefits the lesser-known regions of the Netherlands, as it has contributed to growth there too. Source: CBS 2023

Photo: Daan Steijnen van Eck

3.2. German tour operators’ Netherlands offers

The travel programmes of German tour operators show the Netherlands as a destination is still dominated by offers to the coast and to Amsterdam. These destinations are in high demand and tour operators are responding accordingly.

The tours on offer often play on traditional Dutch clichés, with images of windmills, cheese and tulips.

This traditional image will probably never disappear completely, but there is an increasing demand for aspects of the contemporary Netherlands, to which tour operators are responding with a corresponding product range. There is a growing variety of Dutch destinations and experiences beyond the traditional destinations. Here are some trends and changes in the product offering:

1. Discovering lesser-known cities and regions:
In addition to Amsterdam, tour operators are increasingly promoting other cities and regions.

2. Cultural trips and city breaks:
There is a growing trend towards cultural trips and city breaks that go beyond the traditional tourist centres.

3. Nature and active tourism:
Programmes increasingly include cycling tours, hikes and canoe trips.

4. Theme holidays:
Art and architecture tours, garden tours, history and culture tours as well as music and festival tours.

The more thematically and target group-oriented the tour operators align their products, the more the Dutch stereotypes disappear from the imagery of the catalogues and programmes.

Reasons for the tour operators’ rethink
- A younger target group is open to new goals and topics.
- Repeat visitors, who already know the hotspots, are interested in discovering new places.
- The price trend in high-demand destinations plays a key role. As it is becoming increasingly difficult to find allotments at affordable prices in good hotels, tour operators are often forced to rethink and integrate alternative offers into their product range.

In addition to expanding their product range and diversifying their types of travel, tour operators needed to respond to the digital transformation. Digitalisation has fundamentally changed the interaction with customers as well as the presentation and booking of products. This enables providers to respond better to the growing trend for flexible and customisable travel offers. Travellers increasingly want to design their own itineraries and have personalised experiences. Tour operators are adapting by providing more customised offers, modular travel packages and flexible booking options.

3.3. Overview of German tour operators

According to the German Travel Association (DRV), there are around 2,300 tour operators in Germany. This figure includes large, internationally active companies as well as many small and medium-sized specialised tour operators that are often active in niche markets. Not all local tour operators are relevant to the Dutch market. Many do not even have the Netherlands in their programme, as they focus on sunny destinations in the Mediterranean or long-haul holidays. Others are so small that they just bring a handful of travellers to the Netherlands each year. In the following, the most relevant German tour operators for the Netherlands are examined and categorised with regard to their offers for trips to the Netherlands. Who caters to which target group, and what do their products look like? Customer groups tend to be loyal and book repeatedly with the same provider. A detailed list can be downloaded → *here*.

Categorisation of tour operators

We divide the leisure tour operators relevant to the Netherlands into **three main groups**. The tour operators that serve the **individual traveller (FIT)** and those that focus on the **group business**. Both groups market their products directly to the end customer.

A third group, which is also important for programme design in the Netherlands, are the package organisers or so-called **wholesalers**. These are companies that purchase travel services in large volumes and sell them on to travel agencies or other tour operators.

Tour operator with a focus on Free Indepedent Travellers (FIT)

OTA: Online Travel Agencies:
An OTA is an online platform that offers travel products and services via the internet. It mainly acts as an intermediary between travellers and various providers. Thanks to increasing digitalisation and a change in booking behaviour, OTAs are becoming increasingly popular in Germany. They are particularly popular for short trips and destinations that require little advice or that are already familiar (such as the Netherlands).

Product: The portfolio of online tour operators (OTAs) regarding the Netherlands is mainly focussed on hotels. The majority of hotels are located in Amsterdam, in the other major Dutch cities and along the coast. However, smaller locations also benefit from the online booking platforms, as they are also made visible and bookable. The OTAs therefor completely cover the Netherlands, at least as far as accommodation is concerned.

Target group: Online travel bookings in Germany are dominated by younger age groups, but Generation X and baby boomers are also increasingly booking online.

Examples:

- →Ab-in-den-Urlaub.de
- →Airbnb
- →Booking.com
- →Expedia Group
- →HRS
- →Lastminute group
- →opodo.com

Building block tour operator:
So-called building block tour operators offer flexible travel modules that can be individually combined, e.g. travel, hotel and additional services such as excursions and admission tickets. In contrast to OTAs, they offer their own travel products and services.

Product: In the Netherlands, there is a wide range of holiday homes on offer, ranging from the urban centres and along the coast to the green regions that are not directly by the sea. Typical additional services that can be booked through the larger holiday home providers include travel by train, admission to a museum or theme park, bike hire or concert tickets.

Target group: The age group that books with modular organisers can vary depending on the type of event and the provider's offer. As a rule, however, the offer is aimed at adults of all ages who are interested in specific activities.

Examples:

→ **AMEROPA**
Hotel & railway

→ **AOVO**
Experiences & short trips

→ **Dertour**
Short trips & holidays

→ **Eberhardt TRAVEL GmbH**
Short trips & holidays

→ **Eurotours International**
Short trips & holidays

→ **Get your Guide**
Experiences

→ **Hafermann-Reisen GmbH & Co KG**
Short trips, river cruise

→ **Kurz-mal-weg**
Short trips

→ **Spar Mit! Reisen**
Holiday trips, short trips, experiences

→ **STEWA Touristik GmbH**
Short trip

→ **TUI**
Short trips & holidays

Specialist tour operator

Specialist tour operators are providers that offer customised trips for special interests or target groups. These can be adventure trips, active holidays, cultural trips, study trips, cruises or trips for senior citizens, families or young people.

Product: Cultural offers are strongly represented in the urban regions, where suitable cultural and culinary highlights can be booked in addition to accommodation. The focus here is often on the activity and not necessarily on the holiday destination. This creates an opening for the lesser-known regions of the Netherlands. Special exhibitions, for example, attract visitors to smaller towns. In rural areas and on the coast, active holidays with a focus on cycling, hiking or water sports are predominantly in demand and on offer. River cruises are another type of holiday that should not be underestimated in the Netherlands.

Target group: The age group that books with a specialist tour operator can vary greatly, depending on the type of trips offered and the operator's target group.

Examples:

→ **DCS Touristik GmbH**
River cruises

→ **Frankenland Reisen**
River cruises

→ **Laade Gartenreisen**
Short trips, garden trips

→ **Mainka Reisen**
Short trips, art trips

→ **Plantours (Flusskreuzfahrten)**
Holiday trip, river cruise

→ **Radreisefreunde**
Holiday trip, cycle tours

→ **Radreiseprofi**
Holiday trip, cycle tours

→ **Radweg Reisen**
Holiday trip, cycle tours

→ **Rückenwind**
Holiday trip, cycle tours

→ **SE-Tours GmbH**
Holiday trips, river cruises

→ **Wikinger Reisen GmbH**
Holiday trips, cycle tours

Group tour operator

Group tour operator
Tour operators that specialise in organising group travel can be considered a separate cluster. These companies plan and organise trips for tourist groups, school groups, companies or any other group, for example.

Product: The programmes of group tour operators are still dominated by the classic destinations in the Netherlands. These include Amsterdam, cheese in Alkmaar and Gouda, the Keukenhof, windmills in Kinderdijk and canal trips. For school groups, it is also often Amsterdam or the IJsselmeer. However, tour operators are focusing more and more on alternatives and are increasingly offering more varied programmes. Smaller cities such as the Hanseatic cities or cities in Brabant are finding their way into the catalogues. Active holidays and cultural trips are also being offered more frequently in response to the increasingly active target group.

Target group: The main target group that books tourist trips to the Netherlands is aged 50+. There are also many providers who specialise in school groups.

Examples:

→ **alpetour - touristische GmbH**
School trips

→ **Anton Graf GmbH**
Day and short trips

→ **CTS Travel**
School trips & groups

→ **DB Vertrieb GmbH**
School trips & groups

→ **DCS Touristik GmbH**
River cruises

→ **Eurotours International**
Short trips & holidays

→ **Frankenland Reisen**
River cruises

→ **Hafermann-Reisen GmbH & Co KG**
Short trips, river cruise

→ **Herole Travel**
School trips

→ **Klühspies Reisen GmbH & Co KG**
School trips

→ **Müller-Reisen GmbH**
Short trips

→ **STEWA Touristik GmbH**
Short trip

→ **UNIVERS Reisen GmbH**
Day tours, short trips

Wholesaler – Packager

Wholesaler – Packager
Packagers assemble various travel services into a comprehensive travel package and play a crucial role in the travel industry supply chain, buying large quantities of travel products and selling them on to retailers. This enables smaller suppliers to offer competitive products without having to purchase large quantities themselves.

Product: In the case of the Netherlands, it is often coach tour operators and group tour operators that make use of the portfolio of package tour operators. The package tour operators respond to the demand of these types of organisers. For a long time, they only offered the classic destinations in the Netherlands, but here too there is a reconsideration taking place. On the one hand, customer preferences are changing and on the other hand, rising costs at the hotspots in the Netherlands are prompting adjustments in the offering.

Target group:
The main target group is 50+.

Examples:

→ **Appina**
Experiences & short trips

→ **Art Cities**
Art & Culture Travelling

→ **BBT.Travel**
Experiences & short trips

→ **Behringer Touristik GmbH & Co. KG**
Experiences & short trips

→ **Eurotours International**
Short trips & holidays

→ **Globus Tours GmbH**
Supporting programme for river cruises

→ **GTW-Grimm Touristik Wetzlar GmbH**
Short trips

→ **H.I.T.S. Harle Internationaler Tourenservice GmbH**
Short trips

→ **SERVICE-REISEN Heyne GmbH & Co. KG**
Short trips

→ **Überland Tecklenburg GmbH**
Short trips & holidays

4 SWOT

An analysis of strengths, weaknesses, opportunities and threats of the Netherlands as a destination. 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 and opportunities, the following SWOT analysis also shows threats that are mentioned repeatedly.

+ Strengths

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

· Strong tourism offering in the provinces of North-Holland, South-Holland, Zeeland, Utrecht, Noord-Brabant, Gelderland & Limburg

· The Netherlands boasts an exceptional cycling (>35,000 km of exclusive bike roads) and water(sport)way infrastructure (> 6,300 km waterways) enhancing the appeal of the country as a prime destination for cycling and watersports enthusiasts.

· The Netherlands offers a high number of tourism experiences in close proximity to each other, providing diverse options for travellers within a compact geographical area.

· The Netherlands provides a varied cultural offer, encompassing heritage, arts, and cultural events, contributing to a rich and diverse visitor experience.

· High availability of online bookable accommodation.

· The presence of a high number of holiday parks (5.100 parks, 140.000 homes) across the country offers diverse accommodation options for tourists.

· The Netherlands possesses a world-leading EV charging network (27% of all charging stations in EU are in the NL), contributing to its position as an environmentally responsible destination.

· The Netherlands is renowned for its vibrant cities and has a reputation for being a hub of creativity.

— Weaknesses

· The Netherland has a limited good weather guarantee.

· Less German speaking staff is available.

· The Netherlands has a weak reputation as long trip (main holiday) destination.

· The Netherlands offers a limited range of large accommodation providers, so that the travel industry has to deal with many “small” providers.

· The Randstad area’s saturation and lack of availability pose challenges in managing tourism impacts and distributing economic benefits.

· Regions such as Groningen, Drenthe, Overijssel, and Flevoland face limitations in their tourism offerings, potentially reducing their appeal to visitors.

· Limited online bookability of attractions outside of the Randstad.

· The limited offering of unspoiled natural beauty (exception: the coastline incl. Wadden) is a weakness that may impact the appeal of the destination for nature enthusiasts.

Opportunities

· The increasing number of aging and affluent individuals (Germany: 60+ currently 24.8 million, in 2035 ca. 27.5 million.) presents an opportunity for the tourism industry because the demographic has more time for holidays.

· The rise in short trips among younger generations (Germany: overall from 6.3 million short breaks in 2019 to 8.4 million in 2030 expected) provides an opportunity for destinations to capture this market segment with targeted offerings.

· The trend of high online bookings (Germany: >80% online with either OTA or accommodation) with products offers an opportunity for businesses to streamline processes and enhance customer engagement.

· The prevalent use of cars (Germany: 68% share overall; > 75% share from boarder regions) as a mode of transportation to the Netherlands gives opportunities for spreading visitors over the country.

· The increasing interest in active holidays and eco travel creates opportunities for unique and sustainable travel experiences. (Germany: cycling and walking in cities and nature are top 2, 3 and 5 activities when visiting the Netherlands).

· Room for growth off-peak (Nov-Mar) as well as in the backyard of popular destinations (accommodations in the second row).

· Holiday parks and camping visitors are open to inspiration for things to do in the surrounding area (combining nature and city visits).

· Increase in eco travel enthusiasm. Sustainability is increasingly becoming top of mind.

Risks

· The price/quality level, especially in the hotel sector, is often worse for German travel trade buyers than in Germany or other comparable destinations.

· Tour operators often have few staff, which is why product buyers are often unwilling to integrate new themes or regions into programmes.

· The already high and further growing demand (Germany: Expectation that short trips (overall from Germany) will increase by 8% by 2030) for the Netherlands' tourism product can strain capacity and availability, posing challenges for sustainable tourism management.

· The proximity of the Netherlands' coast may lead to a concentration of visitors in coastal areas (Germany: more than 30% of respondents from three federal states (NRW, Lower Saxony and Rhineland-Palatinate) with a total population of 30 million state in the OIT that holidays at sea are their main reason for travelling), affecting the distribution of tourism benefits.

· Limited awareness of lesser-known areas by the target audience may hinder the promotion of diverse and unique travel destinations.

· Not providing a multi-lingual tourism offering may hinder effective communication and engagement with diverse international visitors.

· Accommodations in high demand regions increasingly market themselves with no/limited interest in cooperation with the travel trade industry.

· Accommodation providers are not willing to pay an advertising cost subsidy or a commission, as is common with many tour operators.

5 Summary

The Travel Trade Scan Germany 2024 provides a comprehensive analysis of the German travel market, highlighting key trends, market developments, and consumer behaviour.

Despite various global crises, Germans remain avid travellers. The travel market bounced back significantly in 2023, surpassing pre-pandemic levels with an increase in travel spending, reaching a record 79 billion euros. As a result, the tour operators' turnover reached 37.3 billion euros, up from 28.5 billion in 2022. Online bookings have been steadily increasing. The choice of booking channel depends on the complexity and destination of the trip. Younger travellers still prefer digital bookings, while older travellers are also increasingly booking online.

Germany is the largest source of international tourists to the Netherlands. In 2023, around 7.2 million Germans visited the Netherlands, with forecasts suggesting an increase to 7.5 million in 2024. Popular destinations include North Holland, Zeeland, and South Holland, with an increase in interest in lesser-known regions. There is a shift towards more specialised and thematic travel offerings, such as cultural trips, nature tourism, and active holidays. This offers the chance to draw attention away from the well-visited regions to the lesser-known areas which offer a variety of nature activities such as cycling and watersports.

By expanding their product range and diversifying their types of travel, tour operators can provide a richer and more varied travel experience, encouraging tourists to explore and enjoy the full spectrum of what the Netherlands has to offer. Especially younger people are open to new experiences and among all target groups there is increasing interest in more sustainable travelling.

This approach not only caters to the growing interest in nature and active holidays, but also helps in managing tourist flows and promoting sustainable tourism.

However, there are still steps to be taken to include the lesser-known regions in the tour operators' programmes and to make Dutch partners aware of the evolving needs of German visitors. NBTC responds to these opportunities by bringing together Dutch and international partners from the travel industry in this important core market.

All in all, this travel trade scan underscores the robust recovery of the German travel market, the evolving booking behaviours towards digital platforms, and the growing demand for diverse and specialised travel experiences. It highlights the Netherlands as a key destination for German tourists, with opportunities for further growth and diversification in travel offerings.

More holistic information can be found under the following links:

→ *Travel Trade Website Germany*
→ *NBTC Key Insights – Visitors from Germany*
→ *Knowledge base*
→ *A focus on international visits – NBTC*

Contact and colophon

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Tourist Information

For tourist information about the Netherlands, we refer you to our website → *holland.com*, or to one of the tourist information offices.

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