

HIGH-SPENDING GERMAN TRAVELER TRENDS

MARCH, 2023

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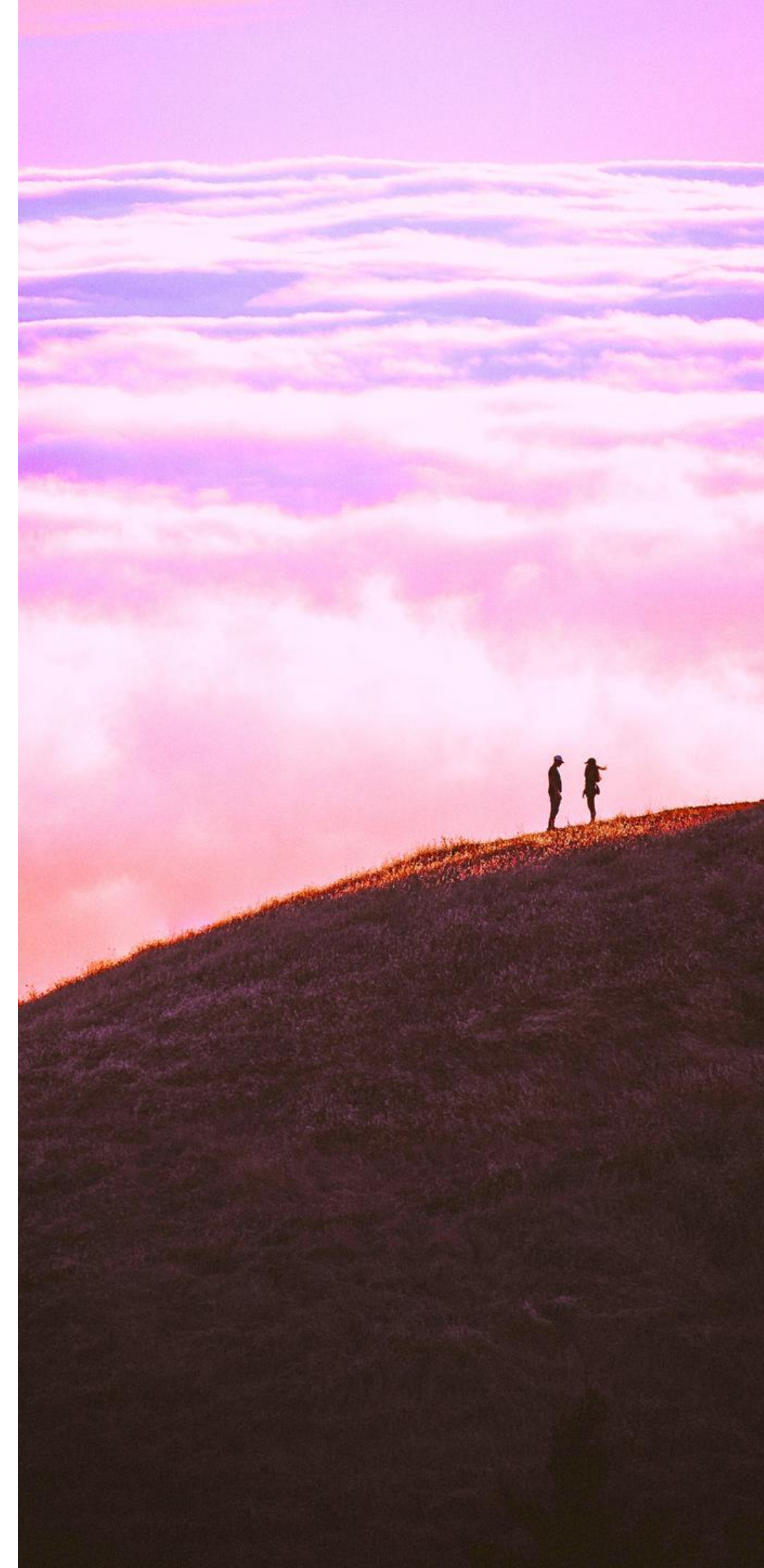
La fuerza de creer



WHAT WE MEAN WHEN WE SAY HIGH-SPENDING TRAVELER

This segment is broader than classic "luxury traveler", and is related more with the purchase power, the willingness to pay and the different approach to "luxury":

- **Luxury resonates with lifestyle choices**
- **Luxury is becoming a well-being concept**
- **Luxury is personalization and tailored services**
- **Luxury is highest quality customer service**
- **Luxury implies creating positive impact through spending**
- **Luxury equals choices (but relevant ones)**





WHO WE SURVEYED

BASIC DATA ON THE FIELD*

- 1** German residents who have stayed out at least one day for leisure or business in the last 5 years.
- 2** 1.512 online CAWI interviews performed in November 2022.
- 3** Basic comparative info: Oficiales: INE EGATUR, DESTATIS, Braintrust Barometers, other studies.
- 4** Confidence level of the statistic sample of this study: +95%
- 5** Average annual household income: 130.000€

*Survey conducted by BraintrustCS as independent analyst for KLEBER GROUP.

UNDERSTANDING THE SURVEY

Results are analyzed combining two perspectives



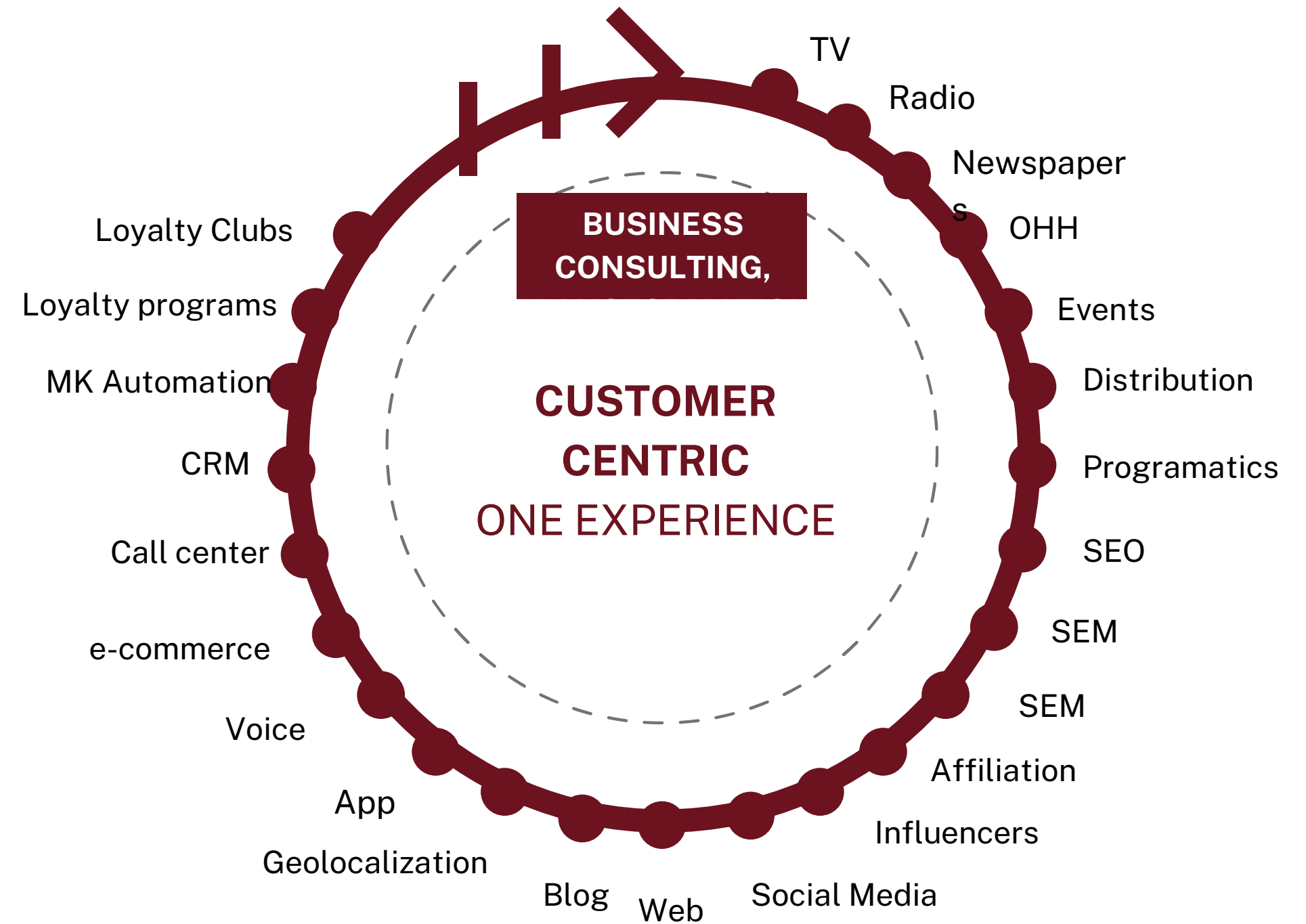
**Habits, drivers
and stoppers**



**Funnel behavior
and travelers'
journey**

UNDERSTANDING THE SURVEY

Results also tap into 360 communications, integrating all touchpoints with travelers (paid, earned, search, owned).



KEY FIGURES AT A GLANCE

GERMAN HIGH-SPENDING TRAVEL MARKET



German high-spenders travel market share: 8% of travelers



Number of trips per year: 3.5 (adapted to season breaks)



Average stay: 11 days



Average spend (including flights and accommodation): 3.1K to +10K



Percentage of customization relevance: +61%



Willingness to pay for sustainable policies: +55% (+5% more average spend)



Loyalty rate share: 5%

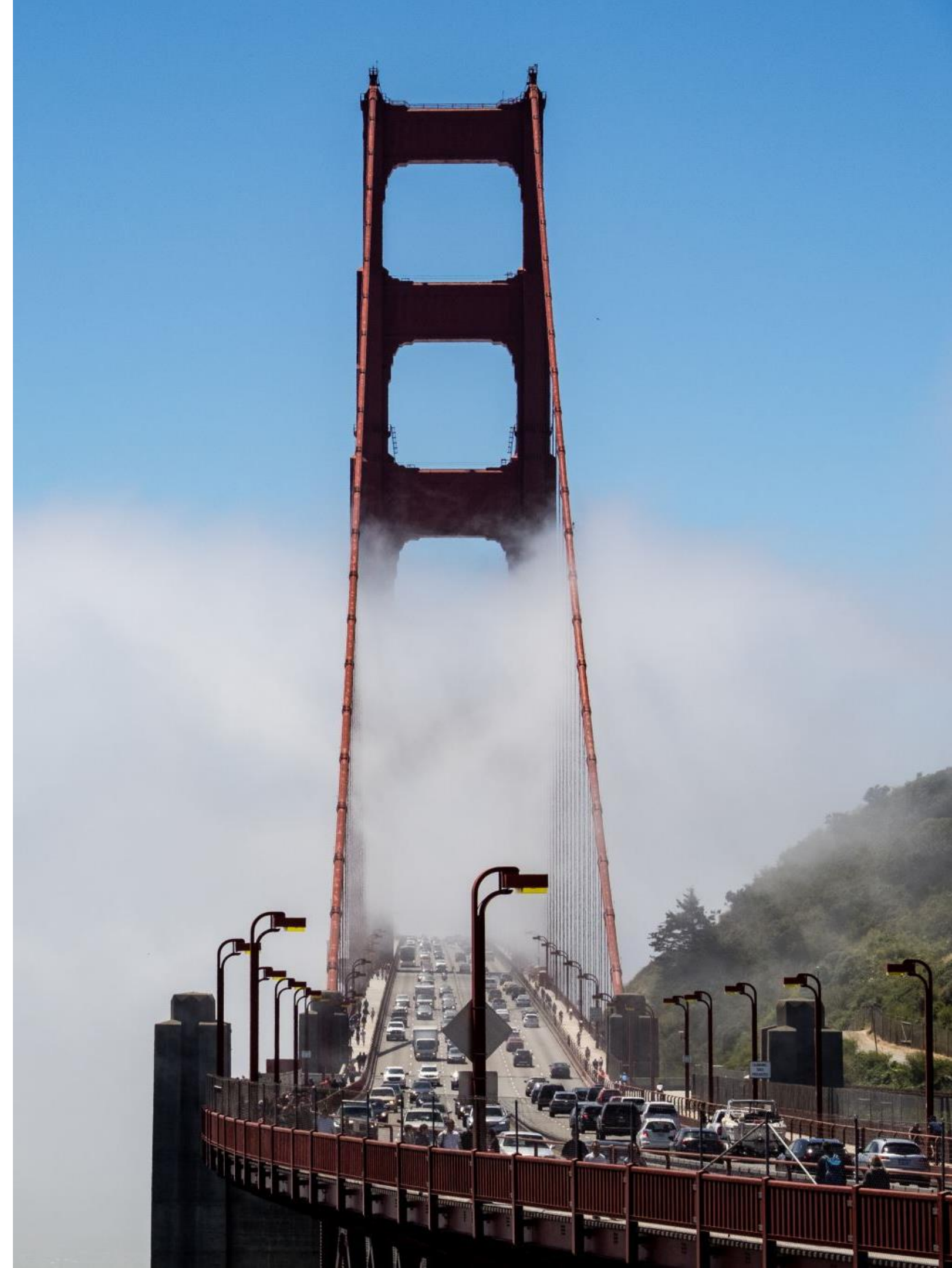
A photograph of a two-lane asphalt road stretching into the distance towards a sunset. The sky is filled with soft, orange and pink clouds. The road is flanked by green fields and trees. A large white text overlay is centered on the road.

KEY FINDINGS

German travel market trends for high spenders

THE GERMAN LUXURY TRAVELER LIKES TO TRAVEL AND DO IT A LOT.

**On average, they make 3.5 trips a year.
64% make more than three trips a year, while
16% make more than 6 trips a year.**





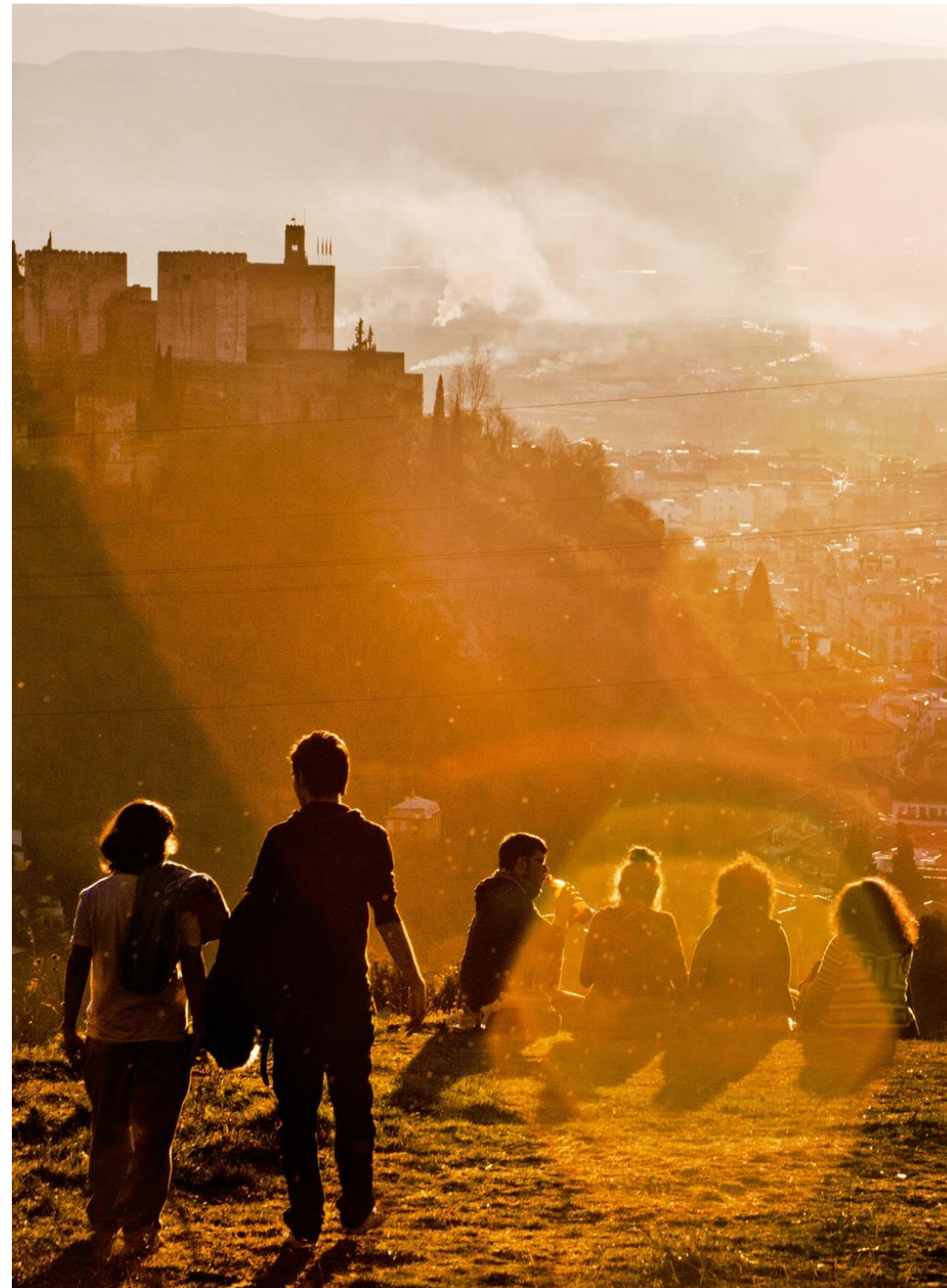
DISTANCE IS NOT A PROBLEM

More than half of its trips are in Europe, and almost 20% outside Europe. Only 27% are domestic.

LONG HAUL, LONGER STAYS (AND FIERCE COMPETITION)

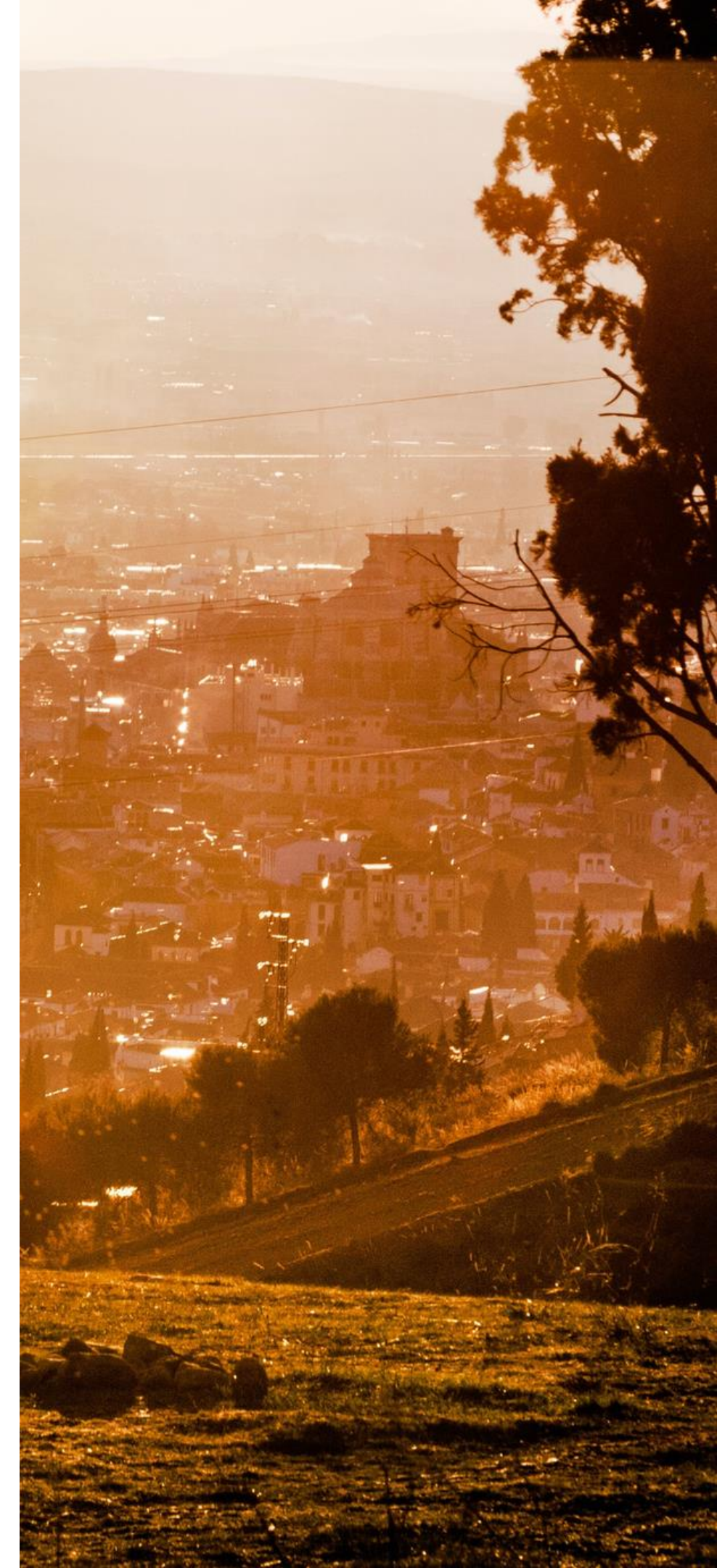
German high-spending travelers are keen on long haul destinations for their 2023 trips and will tend to stay longer if they find interesting ancillaries and experiences during the planning process.





ENGAGEMENT OPPORTUNITY ON INSPIRATION PHASE

Inspiration, planning and booking stages of the journey concentrate 35.9% of German high-end traveler time (48% for younger high-spenders).



DIGITAL CHANNELS ON THE RISE

For **German high-spending travelers**, **digital touchpoints are becoming a stronger decisive factors (49.5%)** during inspiration stages and can trigger their desire to travel. **The growth of this trigger is even stronger than others, such as word of mouth or professional advice.**





SHOWING OFF IS NOT THEIR THING

Only 18% share content during the trip, and less than 15% at the end of the trip.

Only one in ten shares opinions on Tripadvisor, Google, etc...

ONLINE REPUTATION IS RELEVANT TO LUXURY TRAVELERS

49.5% of the German high-spending travelers always consider online comments and reviews to decide on restaurants, hotels and cultural and leisure plans.





61.8% prefer tailored trips in DIY packages organized by travel advisors.



DIY poses an opportunity to increase *upselling* and *cross-selling*.

DIRECT CHANNELS, AN OPPORTUNITY

Direct bookings are the first choice for 37% of high-spenders when to book hotels (only).



LUXURY TRAVELERS ARE EAGER TO ENGAGE (ONLY IF RELEVANT)

Only 3% of high spending German travelers get e-communications (emails, newsletters, sms) from hotel chains, even though 81.4% consider them “very interesting”, only if they are properly customized.

NEW EXPERIENCES INCREASE WILLINGNESS TO PAY (AND STAYS)

- In 2023, 47.7% of German high-spending travelers are eager to visit new destinations and are ready to pay 6.18% more if the trip includes high-valued experiences, such as gastronomy.
- This segment is the most prone to extend their preplanned stay if, during the planning process, find experiences and proposals that resonate to them.





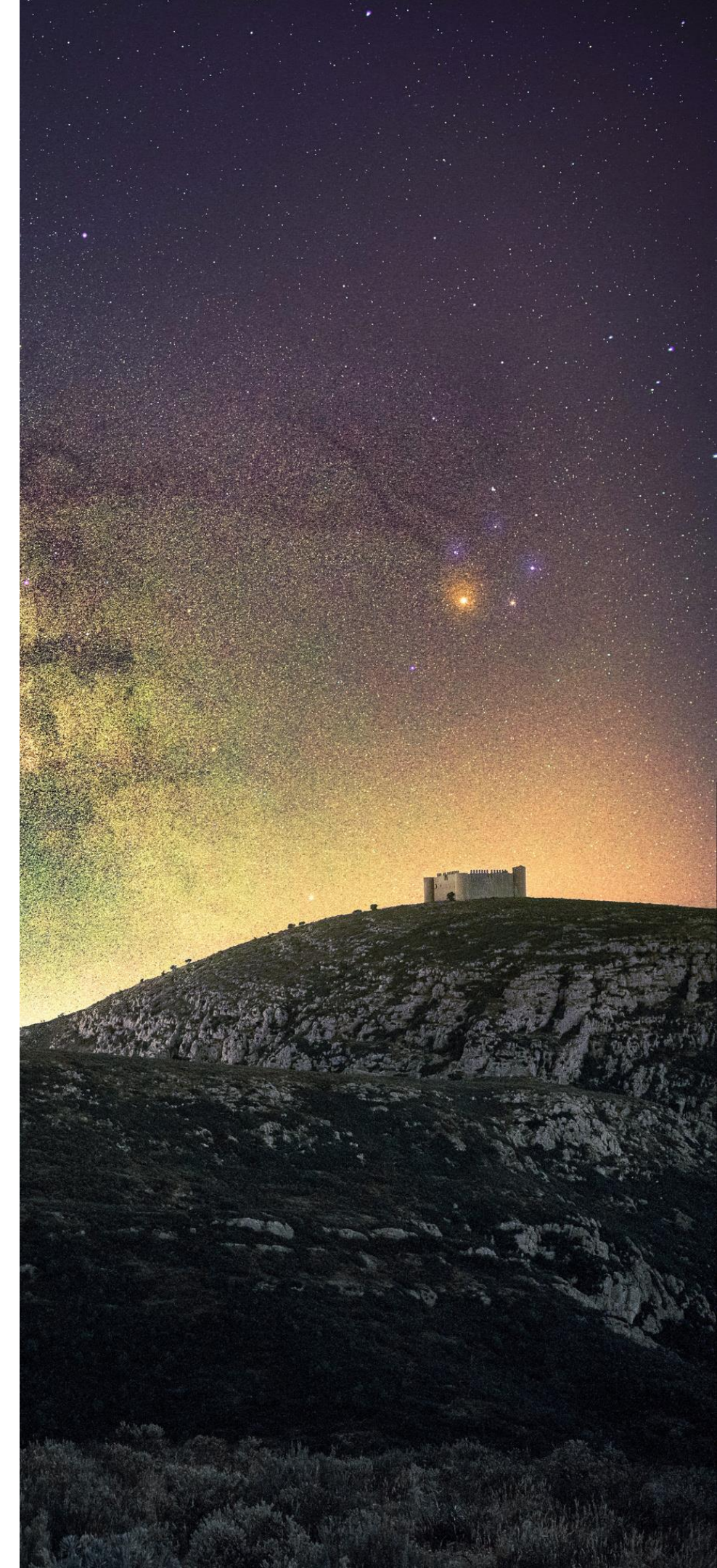
SENSITIVE TO (REAL) SUSTAINABILITY

German high spenders are particularly sensitive to sustainability: they demand info on how it enhances their experience (not milestones, that are taken for granted). **Their willingness to pay increases 5% if sustainability is properly conveyed.**



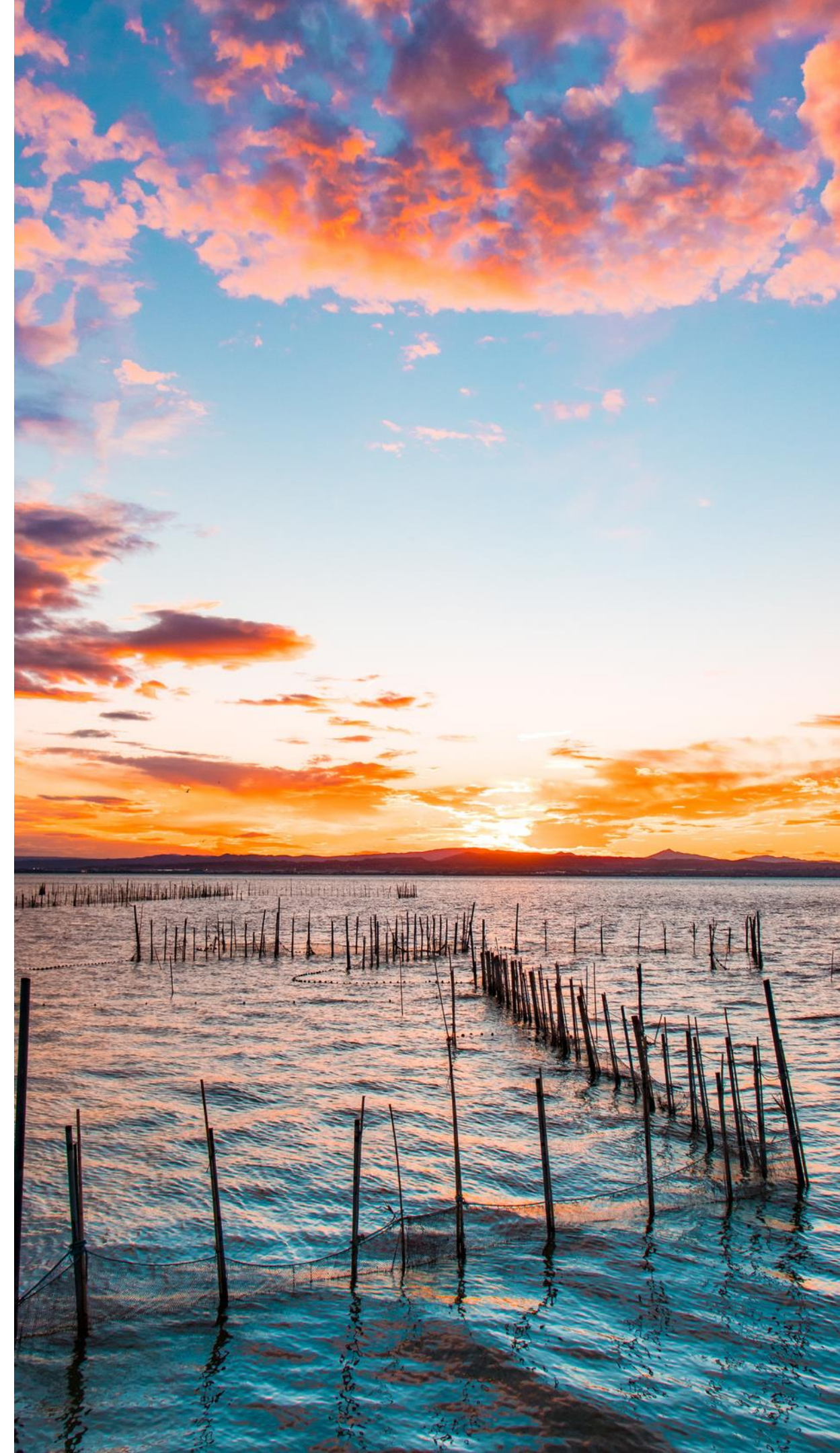
LOYALTY PROGRAMS PAY OFF (FOR HOTELS)

High spending German travelers who joined hotel chains' loyalty programs tend to repeat their booking decision 49.3% more times than regular luxury travelers. **Better prices are not the drivers to join a loyalty program, but upgrades or unique, customized offers.**



RETHINK TOURISM OFFICES AND CONCIERGE SERVICES

76.5% of high spending German travelers who used tourism offices requested information to “enjoy new experiences”, tailored to their tastes and needs. These services should evolve into “concierges” that design customized itineraries to induce spending.





DANKE!

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