

### **A new market survey shows that caravanning is becoming increasingly popular in Germany, despite the downward trend in the travel market**

Market survey by a renowned German opinion research organization identifies new caravanning target groups, and shows that caravanning has gained more than 2 million new adherents

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The Caravaning Industrie Verband (CIVD) recently commissioned a consumer opinion survey on caravanning in Germany, from the renowned German opinion research organization Institut für Demoskopie Allensbach. The results of the survey of a representative sample of owners and potential purchasers of caravans and motor caravans show that the number of Germans who identify themselves as caravanners has grown by more than two million new adherents, to a total of 13.8 million. This figure represents a 16 percent increase in the past two years. What's more, some 1.2 million Germans who are positively disposed toward caravanning have made a concrete decision to purchase a caravan or motor caravan within the next one or two years. The study also reveals that caravanning is gaining market share vis-à-vis the current Covid-induced downward trend in the travel sector.

The Institut für Demoskopie Allensbach's opinion survey identified seven main caravanning target groups such as the "discoverers," the "thrifty," the "flexible," and the "full-time caravanners." The fact that, as the survey found, these various groups differ considerably from each other in terms of their makeup clearly indicates that German caravanners comprise a wide-ranging mix of young and old across all segments.

A new market research survey commissioned by the Caravaning Industrie Verband (CIVD) from the Institut für Demoskopie Allensbach clearly demonstrates that caravanning is an important part of the holidaymaking and leisure-time landscape in Germany. The Institut für Demoskopie Allensbach surveyed individuals who own either

a caravan or a motor caravan, as well as Germans who may be interested in owning a caravan or motor caravan at some point in the future. In addition, the pollsters were able to gain new insights via a representative secondary analysis of data from the Allensbach Market and Advertising Media Analysis, based on around 23,000 interviews per year. This analysis clearly shows that the popularity of caravanning, in its capacity as a popular type of holiday in the great outdoors, has grown, even during the pandemic, and has spawned a sizeable group of new aficionados of caravanning consisting of more than two million German holidaymakers. The result: an increase in this group of caravanning enthusiasts from 11.6 million to 13.8 million Germans, among those 14 years of age or older. The long-term perspective also shows that, although this growth rate may well have been fostered by Covid, the pandemic was by no means the sole or root cause of the increase. Caravanning gained 40 percent of its adherents between 2017 and 2021, and 16 percent over the past two years. A look backward at intentions to purchase a caravan or motor caravan is equally revealing. Relative to 2015, there has been a significant increase of 1.2 million Germans who engage in caravanning and who plan to purchase a caravan or motor caravan sometime within the next 12-24 months.

### **A steady tendency toward the intention to purchase a motor caravan**

The Institut für Demoskopie Allensbach survey also reveals a clear trend when it comes to purchase decisions concerning caravans or motor caravans. 66 percent of the survey respondents who were planning to purchase a vehicle for the purpose of going on holiday opted for a motor caravan. 53 percent of the respondents in this group stated that they intend to purchase a used motor caravan, and 13 percent said that they plan to purchase a new vehicle. Of the 11 percent of respondents who said they plan to purchase a caravan, 8 percent said they would opt for a used vehicle, and 3 percent said they would be purchasing a new vehicle.

### **Purchase criteria for caravans and motor caravans**

The Institut für Demoskopie Allensbach survey also investigated purchase criteria and found that, irrespective of whether a respondent intends to purchase a new or used vehicle, price is the key factor (80 percent of respondents), along with vehicle

appurtenances. And for 58 percent of respondents, vehicle size is an important consideration when it comes to purchasing a caravan or motor caravan. On the other hand, the number of persons that a caravan or motor caravan sleeps is an important purchase criteria for less than half (43 percent) of the persons surveyed.

The survey also found that 40 percent of respondents rented a caravan or motor caravan prior to purchasing one. According to the survey data in this regard, 26 percent of respondents rented a motor caravan, 9 percent rented a caravan, and 4 percent rented both types of vehicles.

### **The market survey identified seven main caravanning target groups**

The Institut für Demoskopie Allensbach's comprehensive analysis of caravanning target groups yielded exciting insights as well, concerning caravanning target groups. These target groups are as follows: the "discoverers," the "thrifty," the "flexible," the "price-conscious," the "steady" the "passionate devotees," the and the "full-time caravanners." The members of the newly identified "discoverers" target group, which represents 17 percent of the survey's respondents, do most of their caravanning via short trips, in a caravan, and in the company of children. The "flexible" group comprises the same proportion of the respondents, in their capacity as the target group known as the "double-income no-kids target group" – namely middle-aged couples who enjoy going on short holidays, in a motor caravan, and who prefer holiday locations that are less frequented. Well-to-do Best Ager, in their capacity as full-time caravanners, enjoy the privilege of travelling year-round in their own motor caravans, with a penchant for spending time in cities.

The Institut für Demoskopie Allensbach's market survey also provides insight into the caravanning related views of millennials, who constitute the next generation of caravanners. As a target group, millennials attach particular importance to sustainability and environmental protection, values they feel that travel via caravanning is fully compatible with. Caravanning Industrie Verband (CIVD) Managing Director Daniel Onggowinarso had this to say about the main takeaway from the Institut für Demoskopie Allensbach market survey: "I find it interesting that, according to the

survey, new adherents of caravanning have pretty much the same values and attitudes as the target groups of relatively long standing – from which I feel it’s safe to say that, while Covid may have prompted more Germans to embrace caravanning than would otherwise have been the case, the pandemic is by no means the sole cause of this evolution.” Mr. Onggowinarso went on to say that the market survey “clearly reveals that caravanners comprise an extensive mix of young and old across all segments” and that caravanning is bound to continue gaining devoted adherents in the coming years as well.

The German entire presentation is available for downloading here:  
<https://www.civd.de/exposee/marktforschung/>

For further information about caravanning, please visit our web sites:  
[www.e-c-f.org](http://www.e-c-f.org), where there are also photos available for downloading; and [caravaning-info.de](http://caravaning-info.de).

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#### **About Caravanning Industrie Verband e. V. (CIVD)**

Caravanning Industrie Verband (CIVD) is the trade association for the industrial arm of the German caravan and motor caravan sector. Our members include German and European caravan and motor caravan manufacturers, numerous caravan and motor caravan supply vendors and service providers, as well as government institutions. Founded in 1962, CIVD represents the interests of the German caravanning industry for all matters of concern to its members, through lobbying and other communication measures directed at German and European political institutions and government authorities. CIVD is also the ideal sponsor for Caravan Salon, the world’s largest caravan and motor caravan trade show. In this capacity CIVD plays a pivotal role in promoting the progress and development of the European caravanning industry.