The 40th Reiseanalyse RA 2010

First results ITB 2010

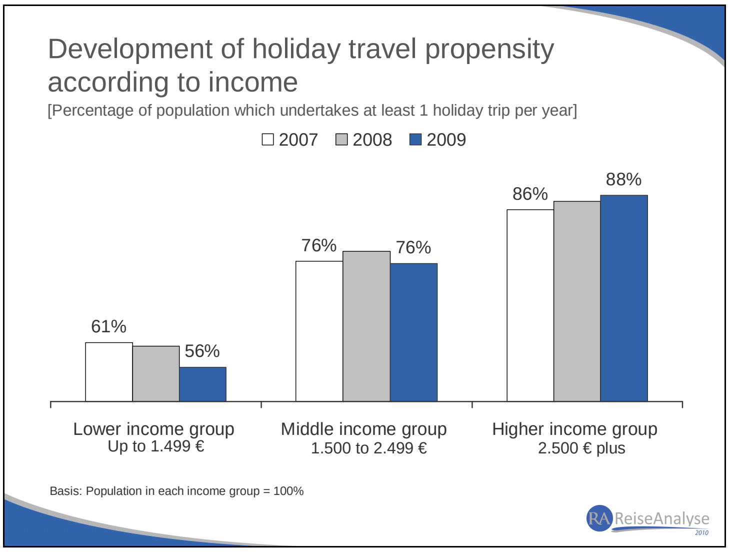
- **Stability and polarisation characterise holiday demand at the same time**
- **Higher income groups rather save while still going on holiday, lower income groups rather forgo their holiday trip completely**
- **Positive outlook for 2010: Germans leave the crisis behind**
- **Germany 2009 with an increase, Mediterranean and Eastern Europe with a decrease**
- **Domestic tourism: Mecklenburg-Western Pomerania catches up with Bavaria**
- **No travel planning without the Internet, Web 2.0 becomes more and more important**
- **Registration for RA Newsletter at www.reiseanalyse.de**

Stability – but not for everyone. That is the short summary of the current status quo of German holiday travel demand.

The **stability**, which characterises the market, can be seen in all key demand figures: Both the holiday travel propensity, according to which ¾ of all Germans undertook a holiday trip in 2009 despite the economic crisis, as well as the number of holiday trips with more than 64 million trips in 2009 stagnate on the previous year's level. Furthermore, there is no decrease in travel planning: The number of Germans planning a holiday trip in 2010 is as high as in previous years.

In comparison to 2009, the perceived framework conditions have clearly improved: In 2010, the German population is much more optimistic about the future as at the beginning of 2009.

However, even despite this stability the economic crisis has left its mark on the German tourism market: Even though the impacts are not as strong as in other source markets or sectors, an increasing tendency for the **polarisation** of demand can be seen: While some Germans have restricted their travel behaviour because of the economically instable situation, others have even travelled more than in the previous year.



This development especially shows when comparing different income groups: While persons with a lower income have reduced their holiday travel propensity over the past three years, persons with a higher income have actually travelled more: The social gap continues to widen, also in tourism.

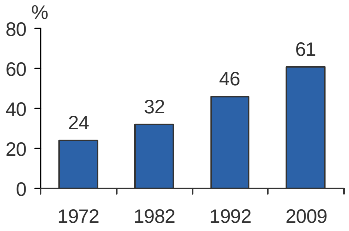
Current holiday travel demand

¾ of Germans on holiday in 2009

49.0 million Germans aged 14 years and above undertook altogether 64.8 million holiday trips of 5 days and more in the past year. Both the corresponding holiday travel propensity of 75.7% and the number of holiday trips are at the same level as in previous years which clearly demonstrates the continuous stability of German holiday travel demand.

Regular travellers contribute to stability

These results, which are quite remarkable considering the economic crisis in 2009, can be explained by the large share of regular travellers within the German population who undertake at least one holiday trip every year (2009: 61%) and the top position that holiday trips have as a consumption priority.



At least one holiday trip made in each of the past three years

In % of the population

German holiday trips – Key figures

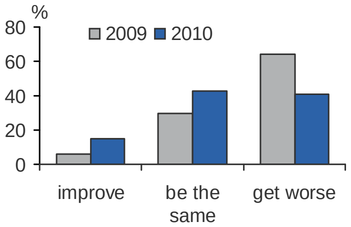
	2005	2006	2007	2008	2009
Population aged 14 yrs.+ (million)	64.9	65.1	64.8	64.9	**64.8**
One or more holiday trips made (in % of the pop.)	73.6	74.7	74.8	76.2	**75.7**
One holiday trip made (in % of the pop.)	55.3	56.3	58.3	58.9	**57.7**
Several holiday trips made (in % of the pop.)	18.2	18.4	16.6	17.3	**18.0**
Number of holiday travellers (million)	47.8	48.6	48.5	49.4	**49.0**
Holiday travel frequency (holiday trips per traveller)	1.3	1.3	1.3	1.3	**1.3**
Number of holiday trips (million)	64.1	64.4	62.9	64.0	**64.8**

Travel intentions as high as ever

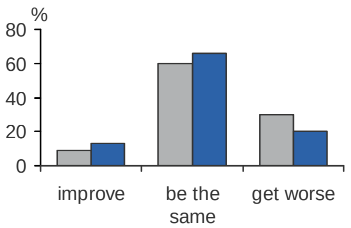
Improvement of perceived framework conditions

The signs for the current year are all positive. Especially the framework conditions are perceived to be a lot more favourable than this time last year: The expectations concerning the general as well personal economic situation in a year's time have improved significantly.

*„the **general** economic situation will …*



*„my **personal** economic situation will …"*



In % of the population

Travel intentions for 2010 are as high as ever: 68% of Germans are planning (almost) certainly to undertake holiday trips in 2010, 16% are (yet) undecided, 15% do not plan a holiday trip at all. Travel intentions as measured by the interest for different destinations and holiday types have even increased compared to previous years.

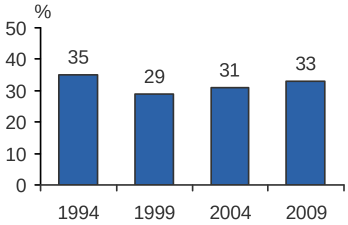
Therefore, it seems that Germans have left the crisis behind, at least in their minds, and that the majority of the German population is looking forward to going on holiday in 2010.

Holiday destinations 2009

1/3 Germany
1/3 Mediterranen
1/3 other countries

With a market share of approximately a third of all holiday trips Germany continues to be the most popular holiday destination for Germans. A further third of holiday trips led 2009 again to destinations around the Mediterranean, the last third to other destinations around the world. This distribution has proved to be very stable over the past years.

Domestic tourism slightly expands on the long-term



In % market share domestic tourism of all holiday trips

Germany is one of the winners in 2009 with a slight increase in market share. Moreover, domestic tourism seems to be a success story on the long-term too: After continuous losses up to the millennium, domestic destinations have managed to change the trend and currently account for 32.5% of all holiday trips of Germans. Hence, domestic tourism 2009 was almost as popular as in the mid 1990s after the German reunification.

The Mediterranean has slightly lost market share in 2009 after becoming accustomed to success in the past years especially in the Eastern parts.

Decreases abroad compensated by increases in domestic tourism

Despite a slight overall loss for **foreign destinations** 2009, some destinations abroad were able to increase their market share. Corresponding to the increase in domestic tourism, many of the predominantly earth-bound destinations in Western Europe also developed in a positive way. This was at the expense of destinations in Eastern Europe - after the curiosity following the enlargement of the EU in the East these destinations now have to make sure that they remain of interest for tourists.

Holiday destinations 2009

	1999	2004	2008	2009	
All holiday trips = 100%	%	%	%	%	million
Domestic total	29.0	30.8	31.2	32.5	21.1
Abroad total	71.0	69.2	68.8	67.5	43.7
Mediterranean - Regions directly adjacent to the Mediterranean -	33.9	34.3	34.8	33.5	21.7
Western Europe - GB, IRL, F, NL, CH, A -	17.0	14.0	13.5	13.9	9.0
Eastern Europe - H, CZ, PL, GUS, etc. -	5.9	7.7	7.1	6.3	4.1
Scandinavia - DK, N, S, FIN -	3.0	3.4	3.1	3.5	2.3
Long-haul	6.8	6.1	6.2	6.5	4.2
Basis: All holiday trips (million)	62.2	65.4	64.0		64.8

Please note: Not all destinations are shown, numbers do therefore not add up to 100%

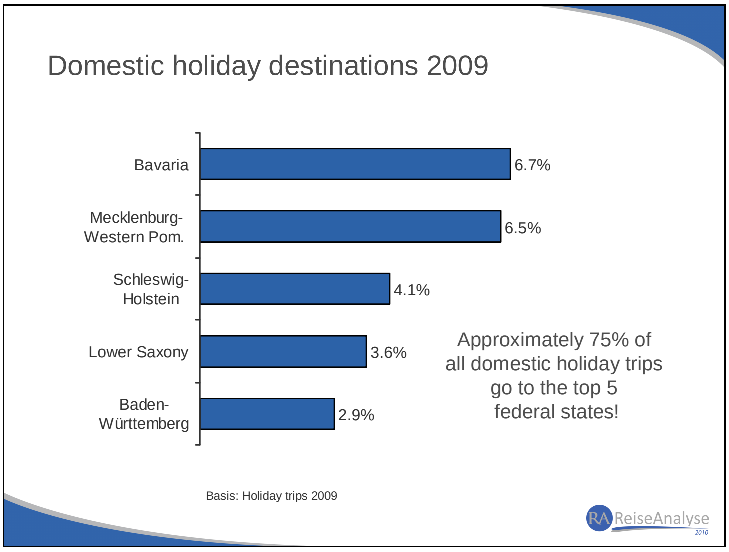
Attention when comparing different sources ➔

Please note that this data is based on holiday trips (5 days and longer) of the German speaking population aged 14 years and above. Business trips and trips lasting less than 5 days are not included in the table. This has to be taken into account when comparing data to e.g. official statistics which usually use different definition criteria.

Destinations 2009

Destinations 2009: Mecklenburg-Western Pomerania catches up with Bavaria

Almost 33% of all holiday trips 2009 led to **domestic destinations**. Bavaria remains the number one, but Mecklenburg-Western Pomerania follows behind by only a very small margin. The top 5 are completed by Schleswig-Holstein, Lower Saxony and Baden-Württemberg. Compared to previous years the order of these destinations has not changed.



Spain remains the most popular holiday destination of Germans abroad

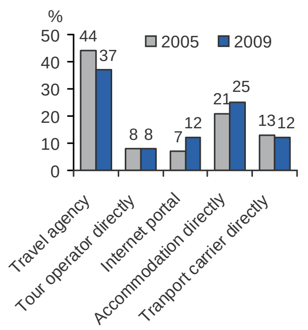
Turkey after Austria again in fourth position 2009

Abroad, Spain continues to be the market leader by far with Italy, Austria and Turkey following its lead, the latter two swapping places again in comparison to 2008. Croatia and Poland are able to keep their market position of the past few years. Therefore, the ranking of the most popular destinations abroad also remains largely unchanged.

Holiday organisation and holiday travel behaviour 2009

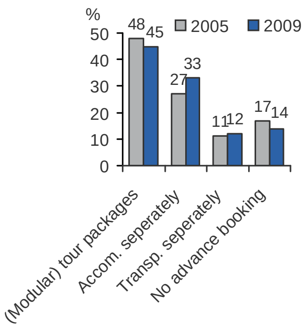
Structural chances for organisation and booking: The Internet continues to gain in importance

Booking channels



In % of all holiday trips with prior booking

Holiday organisation



In % of all holiday trips with prior booking

Changes in holiday travel behaviour 2009 result from small shifts in destination choice and holiday organisation

In 2009, the development of holiday organisation and holiday travel behaviour was characterised by both long-term trends as well as short-term tendencies in overall tourism demand:

The Internet continues to gain in importance. This in turn causes a slow but constant structural change of the whole complex of organisation and booking: As for booking channels, online portals and accommodation providers are able to increase their share of bookings at the expense of travel agencies. This is especially due to the steadily improving online booking facilities of accommodation providers which further encourages the tendency to book single travel services instead of complete tour packages.

These developments are intensified in 2009 by a slight change in destination choice with fewer trips abroad and more domestic and earth-bound trips. This also leads to a small increase in direct bookings, especially for accommodation.

Together with Mediterranean destinations and tour packages, air travel experienced a small reduction in market share in 2009 compared to previous years. Correspondingly, car and train travel were able to increase their market share by a small margin in 2009.

The average travel duration has further shortened in the past year (from 12.5 days to 12.2 days on average). The same is true for holiday expenditure which has fallen from € 834 in 2008 to € 822 in 2009.

Holiday travel behaviour 2009

All holiday trips = 100%	1999	2009		
Transportation	**Total**	**Total**	**Domestic**	**Abroad**
Car/mobile home	50.1	47.9	75.8	34.3
Plane	33.1	35.8	1.3	52.4
Coach	9.3	8.6	9.3	8.2
Train	5.9	5.2	11.8	2.0
Accommodation				
Hotel/guest house	45.1	47.5	27.8	56.9
Holiday apartment/home	24.8	25.0	36.7	19.2
B&B/private room	10.3	7.3	11.0	5.5
Camping	7.0	6.3	8.4	5.5
Travel expenditure total per person per trip (Ø in EUR)	728	820	506	971
Ø Travel duration in days	14.0	12.2	10.1	13.2
Holiday trips total (million)	62.6	64.8	21.1	43.7

ReiseAnalyse 2010

Holiday expenditure 2009/2010

Planned and factual holiday travel expenditure 2009 compared to 2008

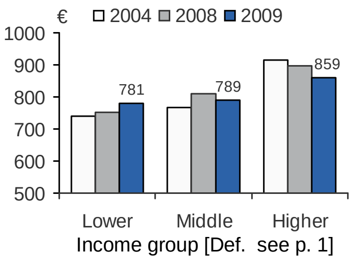
	Planned	Factual
... more	9%	22%
... the same	58%	54%
... less	11%	11%
Don't know	22%	13%

In % of holiday travellers 2008 (planned) and 2009 (factual)

According to their own statement, 11% of German holiday makers spent less on their holidays in 2009 than in 2008. 54% spent just as much as the previous year, 22% spent even more. Thus, a larger percentage of travellers actually spent more than originally planned. This increase mainly stems from those travellers who were still undecided at the beginning of the year. Taking this into account, factual and planned behaviour largely coincide.

Those who spent less did so mainly by changing their travel behaviour: By choosing cheaper accommodation (30% of those who spent less), cheaper destinations (28%) or through shortening their travel time (27%). This is consistent with the already described changes in travel behaviour 2009.

Holiday travel expenditure per person and trip in 2009 according to income



Basis: Holiday trips of persons in the shown income groups

A very interesting result can be seen in the development of holiday travel expenditure according to income: While expenditure increased in the lower income group, holiday spending noticeably decreased - on a higher level though - in the higher income group. In the beginning we reported on the actually increasing travel activity of people in the higher income group; additionally these figures show that cuts on holiday travel expenditure 2009 were especially made in the higher income group. While parts of the lower income group have completely foregone their holiday trip in 2009 because of the crisis, higher incomes have rather cut back on holiday spending.

10% of travellers plan to save on holidays 2010

Holiday expenditure planned for 2010

In comparison to 2009, I will .... for my holiday trips in 2010	Planned expenditure 2010
... spend more	11%
... spend as much as last year	59%
... spend less	10%
Don't know yet	20%
Possible cost savings (multiple answers possible):	
To look for special offers	30%
To choose a cheaper destination	25%
Not to go on holiday at all	22%
To go on holiday in the cheaper low season	19%
To save on additional costs at the destination	19%
To choose a cheaper accommodation	18%
To go on a shorter holiday trip	14%
To choose a destination that is close-by	13%
To undertake less holiday trips	10%
To undertake several shorter trips instead of one long holiday	4%

Basis: Holiday travellers 2009

RA ReiseAnalyse 2010

Main cost saving options for 2010: Special offers and cheaper destinations - but in third place the option not to go on holiday at all

The cost saving options of Germans for 2010 have hardly changed in comparison to last year (see fig. above): 11% of holiday travellers intend to spend more than 2009, 59% plan to spend as much as last year, 10% plan to spend less. The remaining 20% do not know yet what they will be spending. The main cost saving options of "savers" and those "undecided" are the use of special offers and choosing cheaper destinations. Not to go on holiday at all is an option for every 5th traveller.

Internet use and Web 2.0

68% of Germans are online

Almost all Onliner who travel look for holiday information on the Internet, 2/3 also book online

Internet use and Web 2.0

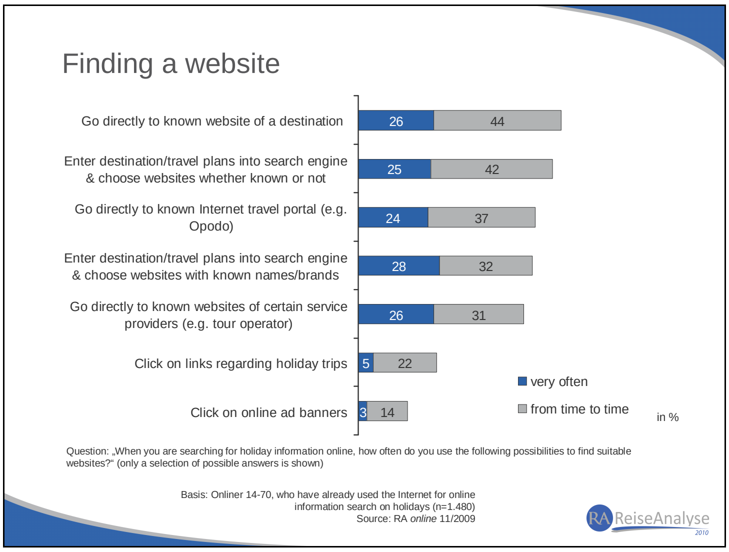
The Internet has become inseparable from everyday life - 68% of Germans were online in January 2010. As already described, the Internet is also becoming more and more important for travel planning: Almost all Onliner who travel use the Internet for holiday planning, 2/3 have already booked online.

During the information search orientation is primarily provided by known destinations and brands, either through direct entry of web addresses or with the help of search engines.

Orientation online by known destinations and brands

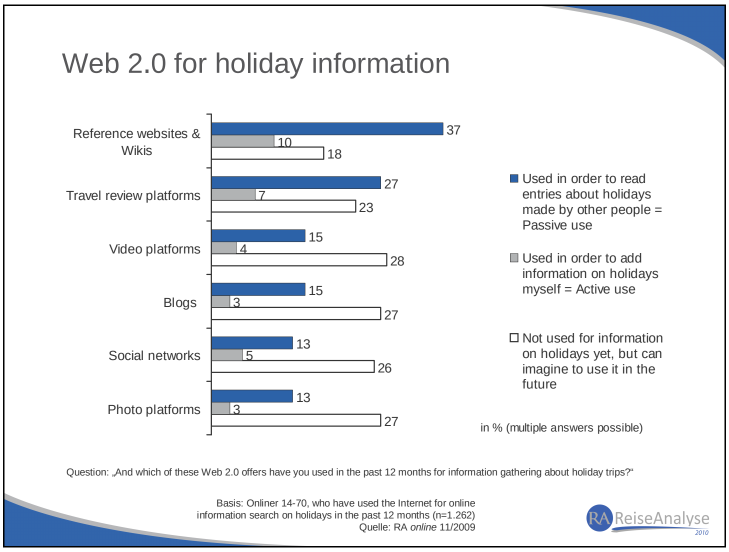
Search engines are used somewhat less often to surf at random

Profiling and marketing of websites are major future tasks for tourism



The Web 2.0 with its interactive possibilities plays an increasing role for travel planning, too: Here the most important information sources are reference websites and travel review platforms.

The Web 2.0 helps with travel planning especially through reference websites and travel review platforms



RA ReiseAnalyse 2010

What is the Reiseanalyse?

In this review of the first results we can only present a very small excerpt of the topics and data covered in the RA 2010

In the modules of the RA 2010, supplementing the standard programme, we also analyse the following topics:

- **Health-oriented holiday types**
- **Short breaks and city short breaks**
- **Web 2.0 and online information search for holiday trips**

In addition, there are numerous other topics, e.g. holiday travel expenditure, reasons for not travelling or booking places/channels

The Reiseanalyse RA 2010 is a representative survey of the holiday travel behaviour of Germans, their travel-related attitudes, motivations and interests.

The survey focuses on holiday trips of five or more days, but short trips of two to four days are also covered. The study is based on 7.660 face-to-face interviews carried out in January/February 2010. The randomly selected sample is representative for the German-speaking population aged 14 years and above, living in private households in Germany (64.8 million).

Subscribers to the RA receive the complete results in form of tables and an extensive report giving an overview of the total German tourist market and major trends. The large sample size allows more detailed analyses, even for small and very specific target groups!

Within the framework of the Reiseanalyse, the **RA *online*** is conducted at least once a year. This is an online survey which supplements the RA through the means of comparable definitions and mainly focuses on relevant ‘online’ topics that can be researched through this means in more depth.

The organisation & the users

FUR, the Forschungsgemeinschaft Urlaub und Reisen e.V., is an independent association of domestic and international users of tourism research in Germany.

The users represent a broad spectrum of companies and organisations in the tourism industry, specialist tour operators, hotel chains, regional, national and international tourism organisations, government ministries and publishing companies.

The research team

The FUR (Dr. Peter Aderhold) together with the *N.I.T.* (Institute for Tourism Research in Northern Europe: Prof. Dr. Martin Lohmann, Ulf Sonntag, Karen Winkler) are in charge of the organisational and scientific aspects of the survey. The market research institute Ipsos (Ulrich Boës, Doni Boll, Hans-Peter Drews) carries out the field work and is responsible for data processing. This team has been working together for more than fifteen years.

The first results presented here have been checked, but we cannot rule out any variations in the final data.

**Text: Ulf Sonntag,
Dr. Peter Aderhold**

RA ReiseAnalyse 2010

How can I obtain the RA?

Unlimited data access: Participation in the RA 2010

Detailed research results of the RA with access to all data from the basic questionnaire programme can only be obtained by those who purchase the RA 2010 (price: EUR 8.900,- excluding VAT). We will gladly give you more information about the contents and possibilities of the RA! Please call us (+49 431 8888800) or visit our website at www.reiseanalyse.de.

Publications by the FUR

To make research results available to the public, the FUR has published several studies which focus on selected topics of interest.

The up-to-date RA Trend Report

- **Holiday travel trends 2020 – The RA Trend Report**

  Taking into account societal and economic conditions, this study outlines trends in tourism demand in order to take a look at the time period up to 2020. *(This document is in German)*

  Price: EUR 390,- (VAT included)

Trends for holiday trips of the 50+ age group

- **Senior travel now and in future – Current data and trends for the senior holiday market**

  Demographic change draws even more attention to an already very interesting target group in tourism: Best Agers. *(This document is in German)*

  Price: EUR 250,- (VAT included)

English summary of the RA 2010 in late summer 2010

- **English Summary Reiseanalyse 2010**

  Major results of the RA 2010 regarding the development and dimensions of the German holiday travel market and the undertaking of holiday trips. (*available in late summer 2010)*

  Price: EUR 160,50 (VAT included)

Further publications

- **Further publications**

  Topics, prices and order options for all publications can be found on the next page and at www.reiseanalyse.de. New publications are planned for summer 2010.

NEW: The RA Newsletter

RA Newsletter: Sign up at www.reiseanalyse.de

Since June 2009, there is a free RA Newsletter which provides you with current information on German tourism demand and the Reiseanalyse. Please go to www.reiseanalyse.de to sign up for this newsletter.

Please detach and fax to the following number:
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Order form

☐ **Urlaubsreisetrends 2020 - Die RA-Trendstudie Entwicklung der touristischen Nachfrage der Deutschen**
(Preis: 390,- Euro inkl. MwSt.)

☐ **Seniorenreisen mit Zukunft - Aktuelle Daten und Trends zum Urlaubsmarkt der Best Ager**
(Preis: 250,- Euro inkl. MwSt.)

☐ **Kurzfassung Reiseanalyse RA 2009**
(Preis: 120,- Euro inkl. MwSt.)*

☐ **English Summary Reiseanalyse RA 2009**
(Price: 150,- Euro incl. VAT)*

☐ **Informationsquellen, Online-Information und -Buchung für Urlaubsreisen (2009)**
(Preis: 40,- Euro inkl. MwSt.)*

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