RA ReiseAnalyse 2011

# The 41st Reiseanalyse RA 2011

## English version of First Results

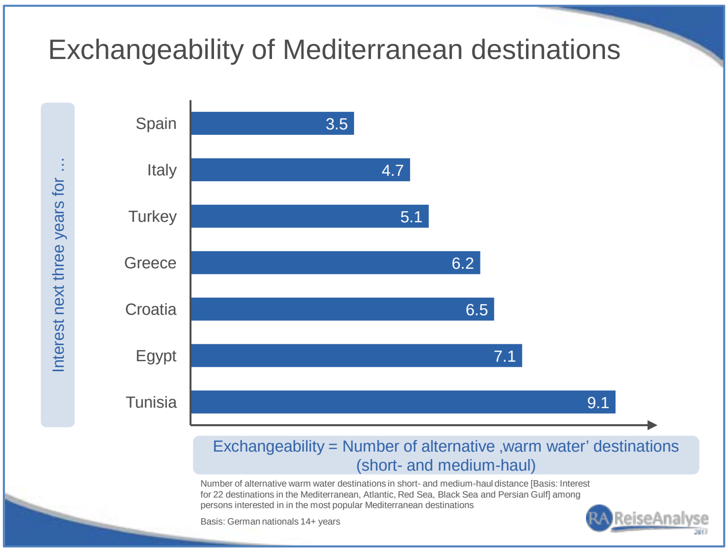
- Stability of holiday travel propensity and volume
- Significantly more short holiday trips
- Noticeable increase of holiday trip expenditure
- More holiday trips by plane and with hotel accommodation
- Long-term structural change of holiday organisation and booking
- The Internet is essential for holiday information. 9 hours per trip are spent online for advance information.
- Good prospects for the holiday market in 2011
- Registration for the RA Newsletter at www.reiseanalyse.de

### 2010 was a good year – 2011 will be even better.

The tourism sector has left the economic crisis behind. This can be seen in an increase of holiday trip expenditure, a slightly longer holiday trip duration and a significant increase of short holiday trips in 2010. The development of the economic situation is considered even more positive and travel intentions for 2011 are already as concrete as they have been in years.

Behind this stable and high number of holiday trips are very experienced, highly regular and holiday motivated travellers, who are increasingly interested in various destinations and holiday types. This leads to a high flexibility of these holiday travellers: They are ‘multioptional’ and thus open to different possibilities for realising their holiday needs. As a result, destinations and holiday types are becoming increasingly exchangeable, even if they differ from each other from an objective point of view.

The exchangeability of holiday destinations can be quantified by the interest for various destinations. The more alternative destinations potential customers for a certain destination have in mind, the more exchangeable the destination is. Within the Mediterranean it can be seen that Spain, with 3.5 ‘warm water’ alternatives, is the least exchangeable destination. Tunisia, in comparison, is the easiest to exchange.




The simultaneous interest for a variety of destinations clearly shows once again how strong the competition among destinations is. However, the exchangeability of destinations also contributes to the overall stability of the market. If one destination drops out temporarily, people simply choose another.

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# Current holiday travel demand

**¾ of Germans on holiday trips in 2010**

2010 shows again the continuous stability of German holiday demand: The holiday travel propensity - i.e. the percentage of the population which has undertaken at least one holiday trip of 5 days and more in the past year - lies with 75.7% exactly on the previous year's level.

**Almost 70 million holiday trips**

Due to the additional consideration of holiday trips of German-speaking foreign nationals living in Germany the RA 2011 surveys almost 70 mn. holiday trips (5+ days) in total for the first time. These can be divided in almost 64 mn. trips undertaken by Germans and 6 mn. trips by foreign nationals.

**86 million short holiday trips**

Additionally, there are 86 mn. short holiday trips with a duration of 2 to 4 days. Altogether, German holiday tourism therefore encompasses 156 mn. holiday and short holiday trips.

German holiday travel – Key figures

| | | 2000 | 2009 | 2010* | 2010* German-speaking, thereof: | |
|---|---|---|---|---|---|---|
| | | Germans | Germans | German-speaking | *Germans* | *Foreign nationals* |
| **5+ days** | *Basis: population 14 + yrs. (mn.)* | *63.8* | *64.8* | *70.5* | *64.8* | *5.7* |
| | Holiday travel propensity (in % of pop.) | 75.9 | 75.7 | **75.7** | *75.1* | *81.6* |
| | Holiday travellers (mn.) | 48.4 | 49.0 | **53.4** | *48.7* | *4.7* |
| | Holiday trips (mn.) | 62.2 | 64.8 | **69.5** | *63.6* | *5.8* |
| **2 to 4 days** | *Basis: population 14 to 70 yrs. (mn.)* | - | *55.7* | *60.8* | *55.2* | *5.5* |
| | **Short** holiday travel propensity (in % of pop.) | - | 53.5 | **57.6** | *57.5* | *58.3* |
| | **Short** holiday travellers (mn.) | - | 29.8 | **35.0** | *31.8* | *3.2* |
| | **Short** holiday trips (mn.) | - | 74.1 | **86.0** | *79.7* | *6.3* |

* Population enlargement within the RA 2011

### Methodical information for the RA 2011

**Survey method: 7,700 face-to-face interviews PLUS 4,000 online interviews**

In January 2011 7,694 face-to-face interviews about holiday-related topics were conducted in private households for the RA 2011. The results are representative for German-speaking persons aged 14 years and above in private households in Germany. Additionally, two online surveys in May and November 2010 with 2,000 respondents each were conducted for the RA *online*. The RA *online* is representative for German-speaking persons aged between 14 and 70 in private households in Germany.

**NEW: Holiday trips of German-speaking foreign nationals are also surveyed.**

New for the RA 2011 is that the data now does not only stand for Germans aged 14 and above in private households in Germany (almost 65 mn. people), but for all German-speaking persons aged 14 and above in private households in Germany (almost 70 mn. people). The RA 2011 thus allows for a differentiated study and analysis of Germans and German-speaking foreign nationals living in Germany, a further important potential segment for tourism demand in the German source market.

When comparing the results of the RA 2011 with previous RA data, this change in the population of the RA needs to be taken into consideration.

# Holiday destinations 2010

**1/3 Germany**
**1/3 Mediterranean**
**1/3 other countries**

With a market share of approximately a third of all holiday trips Germany remains the most popular holiday destination. A further third of holiday trips 2010 led to destinations around the Mediterranean, the last third to other destinations around the world. This distribution has proven to be very stable over the years.

**Germany increases market share among Germans.**

**Destinations in Western Europe lose market share.**

**Mediterranean, Eastern Europe, Scandinavia and long-haul destinations remain stable.**

### Holiday destinations 2010 - Overview

| | 2000 | 2009 | 2010* | 2010* German-speaking, thereof: | |
|---|---|---|---|---|---|
| | Germans | Germans | German-speaking | *Germans* | *Foreign nationals* |
| *Basis: All holiday trips 5+ days = 100%* | *62.2 mn.* | *64.8 mn.* | *69.5 mn.* | *63.6 mn.* | *5.8 mn.* |
| **Domestic total** | 29.3 | 32.5 | **31.0** | *33.0* | *8.9* |
| **Abroad total** | 70.7 | 67.5 | **69.0** | *67.0* | *91.1* |
| **Mediterranean** - Regions directly adjacent to the Mediterranean- | 36.5 | 33.5 | **35.7** | *33.8* | *56.2* |
| **Western Europe** - GB, IRL, F, NL, CH, A - | 15.4 | 13.9 | **12.1** | *12.6* | *7.8* |
| **Eastern Europe** - H, CZ, PL, GUS, etc. - | 6.1 | 6.3 | **7.5** | *6.4* | *20.4* |
| **Scandinavia** - DK, N, S, FIN - | 3.7 | 3.5 | **3.2** | *3.5* | *-* |
| **Long-haul** | 7.0 | 6.5 | **6.5** | *6.6* | *5.5* |

* Population enlargement within the RA 2011

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

Among domestic destinations, Bavaria is able to increase the gap between itself and Mecklenburg-Western Pomerania again. Schleswig-Holstein and Lower Saxony share the third place. Among foreign destinations, Turkey is able to consolidate its third place and almost closes the gap on Italy. Turkey and Poland especially benefit from the separate consideration of German-speaking foreign nationals.

**DOMESTIC:**
**Bavaria remains the top destination and is able to increase the gap to Mecklenburg-Western Pomerania again.**

**ABROAD:**
**Turkey remains in third position; Poland increases its market share.**


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

# Holiday travel behaviour and holiday organisation 2010

In 2009, Germans had adapted their travel behaviour and expenditure to the economic uncertainties. In 2010, they were able to draw on abundant resources (again): More air travel and more trips with hotel accommodation together with a stable holiday trip duration resulted in a noticeable increase of holiday expenditure. After a decrease in 2009, holiday expenditure rose by 5% to EUR 861 per person and trip (of Germans) in 2010. This is the highest amount every measured in the Reiseanalyse.

**For Germans:**

- ► **Significant increase in travel expenditure**
- ► **More air travel and hotel overnights**
- ► **Stable travel duration**

## Holiday travel behaviour

| | | 2000 | 2009 | 2010* | 2010* | |
|---|---|---|---|---|---|---|
| | | Germans | Germans | German-speaking | *German-speaking, thereof:* Germans | Foreign nat. |
| | *Basis: All holiday trips 5+ days = 100%* | *62.2 mn.* | *64.8 mn.* | *69.5 mn.* | *63.6 mn.* | *5.8 mn.* |
| Transpor-tation | Car/mobile home | 49.2 | 47.9 | **47.7** | *47.7* | *47.5* |
| | Plane | 34.6 | 35.8 | **36.9** | *36.4* | *42.2* |
| | Coach | 9.1 | 8.6 | **8.0** | *8.1* | *7.5* |
| | Train | 5.8 | 5.2 | **4.8** | *5.0* | *2.7* |
| Accom-modation | Hotel/guest house | 47.0 | 47.5 | **47.2** | *49.3* | *23.9* |
| | Holiday apartment/home | 23.9 | 25.0 | **24.5** | *24.6* | *22.7* |
| | B&B/private room | 10.2 | 7.3 | **7.0** | *7.2* | *5.3* |
| | Camping | 6.4 | 6.3 | **6.1** | *6.4* | *2.1* |
| | **Travel expenditure** total per person per trip (Ø in EUR) | 792 | 820 | **845** | *861* | *668* |
| | **Ø Travel duration** in days | 13.8 | 12.2 | **12.8** | *12.3* | *17.7* |

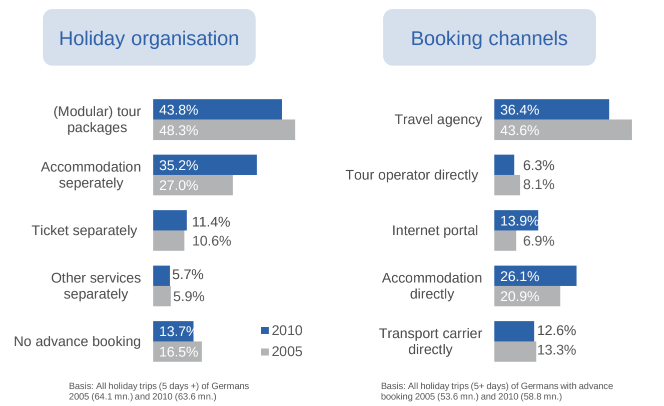
* Population enlargement within the RA 2011

**Less travel agency and tour package bookings**

**… instead more bookings through Internet portals and accommodation providers**

The slow structural change of holiday organisation and booking continues: Online portals and accommodation providers continue to increase their share of bookings at the expense of travel agencies. Due to the Internet, direct bookings are becoming increasingly simple. This supports the tendency to book single travel services at the expense of complete tour packages. Tour operators have adapted their offer accordingly and are involved in all different holiday organisation offers nowadays.

## Holiday organisation and booking

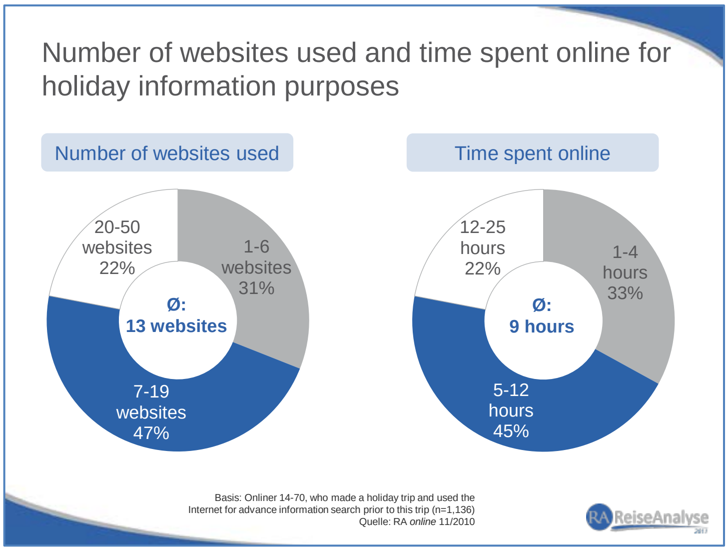


# Online holiday information

**Far more than half of all travellers search online for holiday information prior to their trip.**

The Internet has established itself as a major information source for holiday trips. Far more than half of all travellers use the Internet for their holiday information purposes. Usually, the search is rather extensive and time-intensive: On average, online information seekers 2010 spent 9 hours online and visited 13 different websites in preparation for one holiday trip. A quarter even spent up to 25 hours online and visited up to 50 websites!

**On average, travellers spend 9 hours online and visit 13 websites in preparation for a holiday trip.**



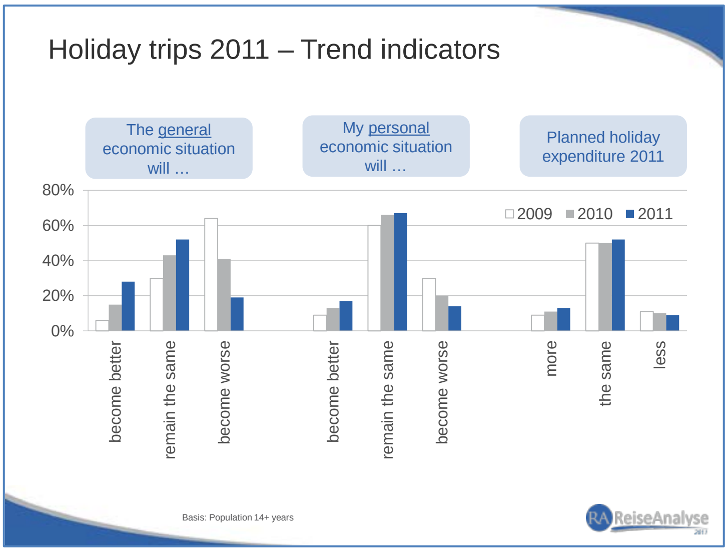

# Holiday travel plans 2011

**2010 was a good year, 2011 will be even better!**

**To be expected 2011:**

- ► **Stable holiday travel propensity**
- ► **Growth potential for holiday expenditure**
- ► **Growth potential for additional holidays**

After a good year in 2010, the RA 2011 data indicates an even better year to come. The development of the economic situation is seen even more positive and travel intentions for 2011 are already as concrete as they have been in years. The willingness to spend money on holiday trips further increases. Altogether this indicates a stable holiday travel propensity in 2011 with growth potentials for holiday expenditure and additional holidays.



# Short holiday trips 2010

**More than ¾ of all short holiday trips go to domestic destinations.**

76% of a total of 86 mn. short holiday trips 2010 (duration of 2 to 4 days) went to domestic destinations, 24% to destinations abroad. Within Germany, Bavaria received the highest number of short trips, followed by North Rhine-Westphalia, Saxony, Berlin, Baden-Wuerttemberg und Lower Saxony. Abroad, Austria is by far the most popular destination for short breaks, followed by France, the Netherlands and Italy.

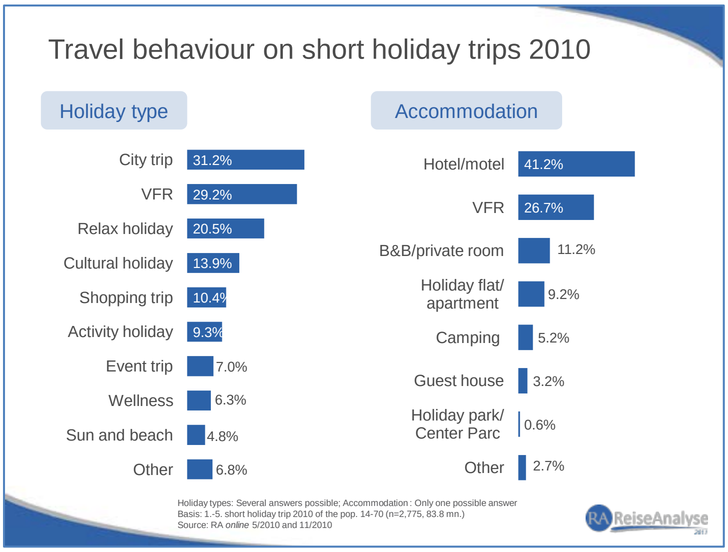
**Bavaria and Austria are the top destinations for short holiday trips.**


City trips are the most popular holiday type for short breaks, closely followed by VFR travel. Quite a number of Germans also undertake relaxation and cultural holidays as short breaks. Hotels are the major accommodation type, followed by VFR overnight stays.

**City trips are the most popular holiday type for short breaks:**

**Top domestic destinations for city trips are Berlin, Hamburg or Munich**

**Top destinations abroad for city trips are London, Vienna or Paris**



RA ReiseAnalyse 2011

# What is the Reiseanalyse?

The Reiseanalyse RA 2011 is a representative survey of the holiday travel behaviour of Germans and German-speaking foreign nationals living in Germany, their travel-related attitudes, motivations and interests. The survey focuses on holiday trips of five or more days and short holiday trips of two to four days. The study has been continuously carried out every year since 1970. Since 2007, the annual face-to-face survey is supplemented by two annual online surveys within the RA *online*.

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

**In this review of the first results we can only present a very small excerpt of the topics and data covered in the RA 2011**

# 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 executive board consists of the chairman (Guido Wiegand, Studiosus Reisen) und two deputy chairmen (Sybille Wiedenmann, Bayern Tourismus and Armin Vielhaber, Studienkreis für Tourismus und Entwicklung).

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 standard question programme is supplemented by modules. Within the RA 2011, the modules are:**

- **Exchangeability and image of holiday destinations**
- **Look to book: From (online) information to booking**
- **Culture and events on holiday trips**

# The research team

The FUR (managing director: Rolf Schrader) 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.

**In addition, there are numerous other topics, e.g. holiday expenditure, mobile Internet or booking places/channels**

# The RA Newsletter

The RA Newsletter is published four times a year and is free of charge. The newsletter provides you with up-to-date information on tourism demand and the Reiseanalyse. If you are interested, just sign up at www.reiseanalyse.de.

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

**Text: Martin Lohmann, Rolf Schrader, Ulf Sonntag, Karen Winkler**

## Order/Contact form

*Please fill in and fax to: +49 (0)431 - 888 86 79*

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Name:

Surname:

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# Participation in the RA 2011

Only participants of the RA 2011 have access to all questions from the standard programme (costs starting from EUR 9,400 plus VAT). We will be pleased to provide you with more information about the content and possibilities of the Reiseanalyse!

☐ Please send me detailed information about the participation in the Reiseanalyse 2011.

# Publications on RA basis

To make research results available to the public, the FUR has published several studies which focus on selected topics of interest. These studies can be ordered directly from us:

☐ **English Summary Reiseanalyse 2011**
Major results of the RA 2011 regarding the development and dimensions of the German holiday travel market.
(available in late summer 2011, ca. 65 pages DIN A4 B/W).
*Price: EUR 160,50 (incl. VAT)*

☐ **English Summary Reiseanalyse 2010**
Major results of the RA 2010 regarding the development and dimensions of the German holiday travel market.
(65 pages DIN A4 B/W)
*Price: EUR 160,50 (incl. VAT)*

☐ **Holiday Travel Trends 2020 - Die RA Trend Report (2009)**
Taking into account societal and economic conditions, this study outlines trends in tourism demand in order to look at the time period up to 2020.
(215 pages in German, DIN A4 in colour)
*Price: EUR 290,- (incl. VAT)*

**Further publications**
Topics, prices and options for ordering of all current publications can be found at www.reiseanalyse.de.

*New publications are planned for summer 2011.*

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