Reiseanalyse RA 2012

Selected first results
of the 42nd Reiseanalyse for ITB 2012

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The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the current Reiseanalyse 2012.

The annually conducted Reiseanalyse is considered to be the most detailed study of the German holiday market. The FUR is an independent association of users of tourism research in Germany and the largest non-commercial organiser and contractor of tourism research.

Key demand figures: Stability with chances for growth

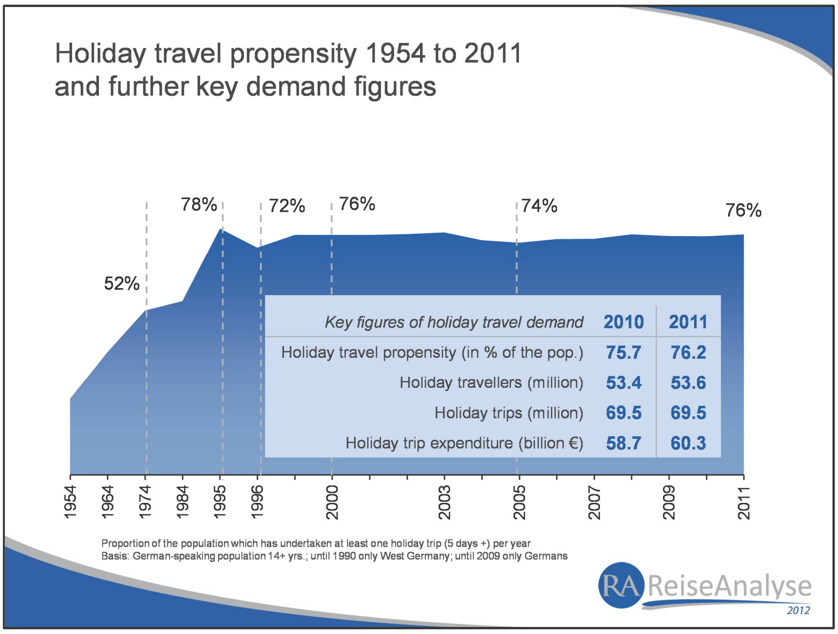
Almost 54 million holiday travellers 2011 – highest number ever!

Stability regarding the volume of holiday trips

Further increase of holiday expenditure

2011 was a good year for travelling. The number of German holiday makers and their holiday expenditure has never been higher than in the past year. The holiday travel propensity reached more than 76%. This is the proportion of the population (70.3 million people: 14+ years, German-speaking in private households) which has undertaken at least one holiday trip of 5 days and more.

In addition to almost 70 million holiday trips, German holiday tourism also encompasses 78 million short holiday trips with a duration of 2 to 4 days. Holiday expenditure on holiday trips added up to more than 60 billion EUR for 2011, almost 19 billion EUR were spent on short holiday trips.



Good prospects for the holiday year 2012

Positive holiday mood!

Plans for holiday expenditure 2012: A little bit more!

Assessment of the personal economic situation: stable!

BUT ALSO: Slightly worse outlook on the development of the general economic situation!

A number of factors indicate that 2012 will be another good year for travelling, possibly even better than 2011. The ‘holiday mood’ in Germany is at the same level as last year: 57% of the population has already concrete travel plans, only 11% are certain that they will not go on holiday in 2012. Most are planning with the same holiday budget as the year before, 12% want to spend even more, 9% less than the previous year.

Nevertheless, the outlook on the economic situation has become somewhat less optimistic. In January 2012 30% expected that the general economic situation would become worse in the next 12 months. A year before, this was only true for 19% of the population. However, travel plans are rather made on the basis of the personal economic situation and these figures have remained stable compared to the previous year: 17% expected a positive development of their personal economic situation in the next 12 months, 14% a change for the worse and the remaining 69% did not expect any change.

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

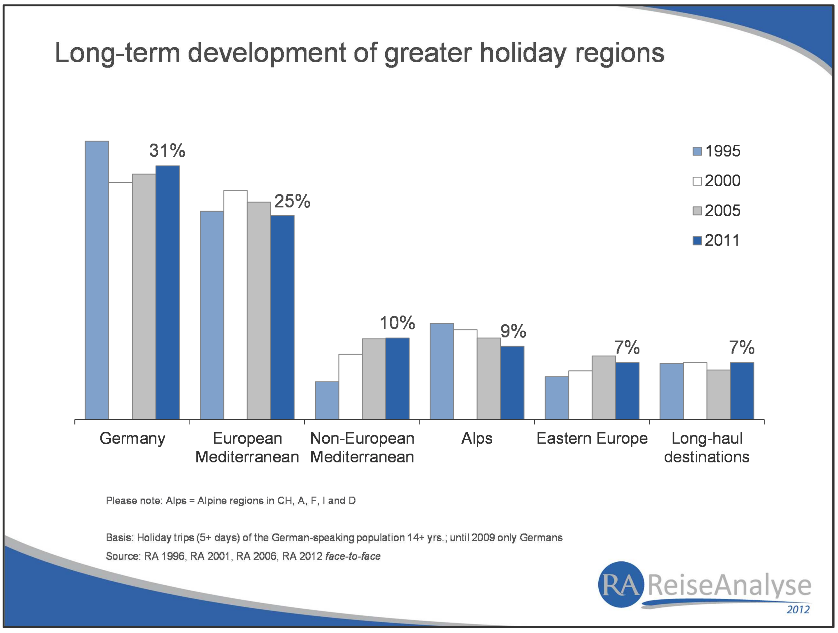
Text: Martin Lohmann,
Rolf Schrader, Ulf Sonntag

Holiday destinations: The important ones remain important!

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 2011 led to destinations around the Mediterranean, the last third to other destinations around the world. This distribution has proven very stable over the years – significant changes are not to be expected for the near future either.

Long-term stable demand dispersion throughout greater holiday regions



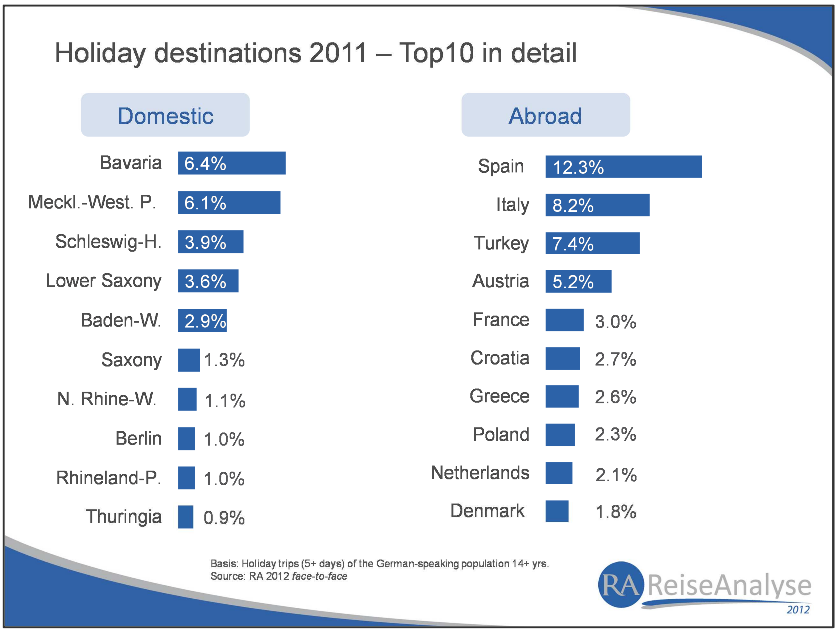
DOMESTIC:

Holidays at the coast or in the South are preferred

ABROAD:

Spain is well ahead of Italy, Turkey and Austria

Domestic holiday trips 2011 were primarily undertaken to coastal or southern destinations: Bavaria and Mecklenburg-Western Pomerania came top, with Schleswig-Holstein, Lower Saxony and Baden-Wuerttemberg in tow. Almost three quarters of domestic holiday trips led to these five states. Among destinations abroad, Spain remains the top destination by far, followed by Italy, Turkey and Austria. Almost half of all trips abroad led to these four countries.



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: Shorter but more expensive!

Holiday trips become shorter and shorter.

Holiday expenditure at a record high: 868 EUR per person and trip.

Transportation: Trips by plane have further increased. Train and coach with a slight increase in 2011.

Accommodation: Hotels dominate overall. Holiday apartments/ homes most popular for domestic holidays.

In 2011, the development towards shorter holidays continued. At the same time the holiday expenditure rose to a new record high of 868 EUR per person and trip. Car and plane were the most popular transportation by far; coach and bus were able to gain some market share at the expense of the car. Holiday accommodation was dominated by hotels, holiday apartments and homes followed in the second place.

Holiday travel behaviour

		2000	2010	2011	2011	
		Total	Total	Total	Domestic	Abroad
	Basis: Holiday trips 5+ days = 100%	*62.2m*	*69.5m*	*69.5m*	*21.7m*	*47.9m*
Transportation	Car/mobile home	49.2	47.7	**46.2**	*74.6*	*33.3*
	Plane	34.6	36.9	**37.2**	*0.7*	*53.7*
	Coach	9.1	8.0	**8.4**	*8.9*	*8.1*
	Train	5.8	4.8	**5.5**	*13.4*	*1.9*
Accommodation	Hotel/guest house	47.0	47.2	**47.1**	*27.6*	*56.0*
	Holiday apartment/home	23.9	24.5	**25.1**	*36.9*	*19.6*
	B&B/private room	10.2	7.0	**6.7**	*11.5*	*4.4*
	Camping	6.4	6.1	**5.3**	*7.0*	*4.7*
	Travel expenditure total per person per trip (Ø in EUR)	792	845	**868**	*526*	*1022*
	Ø Travel duration in days	13.8	12.8	**12.4**	*10.2*	*13.3*

Basis: Holiday trips (5+ days) of the German-speaking population 14+ yrs., 2000 only Germans
Source: RA 2001, RA 2011, RA 2012 *face-to-face*

Holiday organisation and booking: Structural change!

Holiday organisation: Tour packages in first place.

Booking channels: Travel agencies dominate the market.

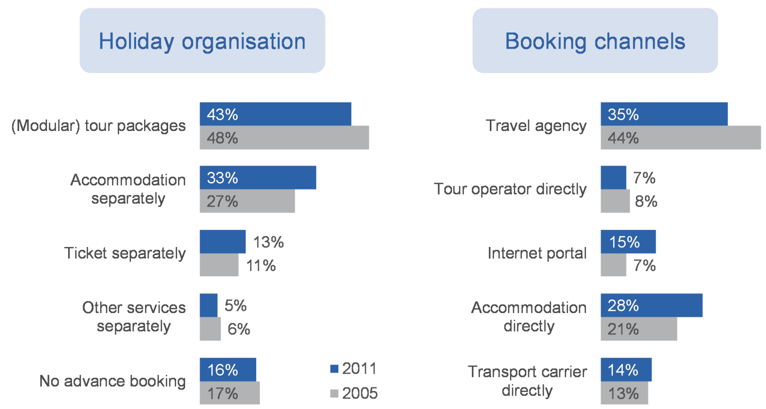
BUT: Long-term structural change

WINNER: Internet portals and accommodation suppliers

LOSER: Travel agencies and tour packages

Due to the rising number of convenient options for direct bookings, especially over the Internet, customers more frequently also make use of this: As a result, tour packages and travel agencies have lost market share in the past years, but are still the most important organisation form and booking channel by far. Accommodation providers and Internet portals have increased their market share.

Holiday organisation and booking



Basis: Holiday trips (5+ days) of the German-speaking population 14+ yrs., 2005 only Germans

Basis: Holiday trips (5+ days) with advance booking of the German-speaking population 14+ yrs., 2005 only Germans

Mobile Internet: Increasingly important for information on the way!

24% use the mobile Internet – 14% via smart phone

In January 2012 24% of the German-speaking population had mobile Internet access; about half of them (14%) used their smart phone or tablet to surf online. While on holiday the mobile Internet serves as a link back home via email and news, but it also provides important information for a successful holiday - from the weather forecast to the bus timetable. This is certainly only the beginning of an exciting development which the Reiseanalyse will continue to monitor in the future!

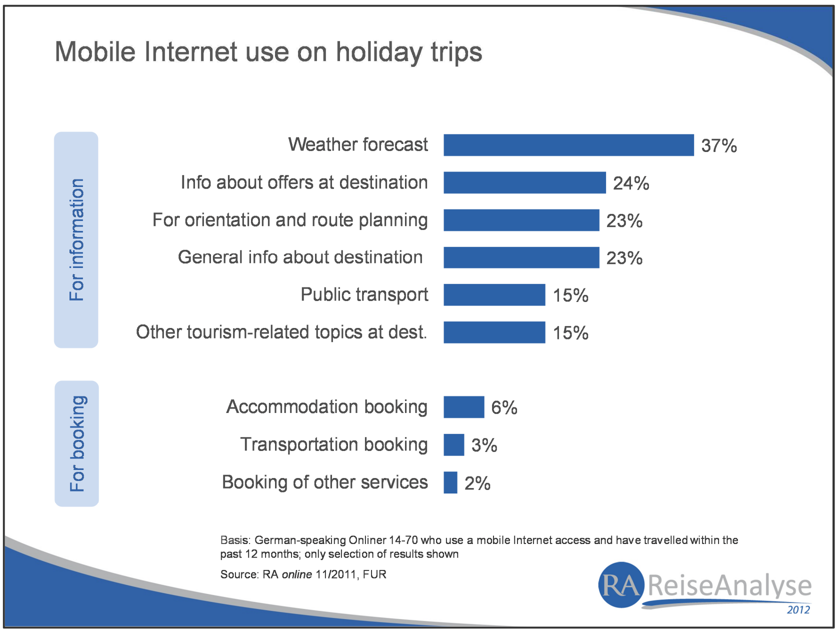
Mobile Internet use on holiday:

1. Link back home

2. Holiday information

Booking en route is not (yet) that important!

Important future-oriented topic for the industry: RA 2012 with special module on this issue



Holiday types: Many destinations are known for certain holiday types

Strong links between holiday type and destination

There is a strong link between the preferred holiday type and the chosen destination: Spain, Turkey and Italy are the favourites for sun and beach holidays. In contrast to this, activity holidays are mostly undertaken in Austria, Italy and Bavaria. For health holidays, Bavaria is even the top destination, followed by Poland and the Czech Republic.

Destination ranking differs according to holiday type

Sun + Beach = Spain

Activity = Austria

Health = Bavaria

The RA 2012 module 'Images of holiday types' looks at the characteristics of holiday types.

What is done where?
Holiday destinations according to holiday type

	Holiday type		
All holiday trips	**Sun/ Beach**	**Activity**	**Health**
Volume (million): 69.5	14.9	4.3	1.9
1st rank Spain 12%	Spain 28%	Austria 26%	Bavaria 22%
2nd rank Italy 8%	Turkey 16%	Italy 13%	Poland 15%
3rd rank Turkey 7%	Italy 9%	Bavaria 10%	Czech Republic 8%
4th rank Bavaria 6%	Meckl.-West. P. 7%	Switzerland 7%	Austria 7%
5th rank Meckl.-West. P. 6%	Greece 6%	Meckl.-West. P. 4%	Baden-W. 5%

Source: RA 2012; Ranking of federal states and countries according to the most important holiday type; Basis: Holiday trips (5+ days) of the German-speaking population 14+ yrs.

Short holiday trips: Preferably in Germany, cities, hotels

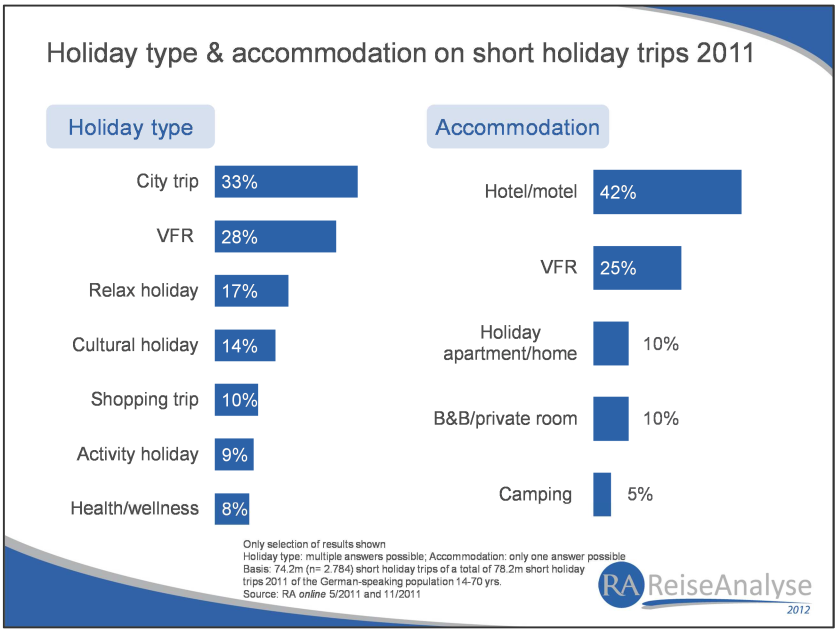
78 million short holiday trips 2011

3/4 to domestic destinations, 1/4 to destinations abroad

Predominantly city trips and VFR, but also relax and cultural holidays.

The hotel is the most important accommodation type, followed by staying with friends and relatives.

76% of a total 78 million short holiday trips 2011 with a duration of 2 to 4 days led to domestic destinations, 24% to destinations abroad. The primary holiday type for short holiday trips are city breaks, followed closely by visiting friends and relatives. Correspondingly, accommodation on short breaks is often with friends and relatives, too. However, the hotel is the most preferred accommodation on these trips overall.



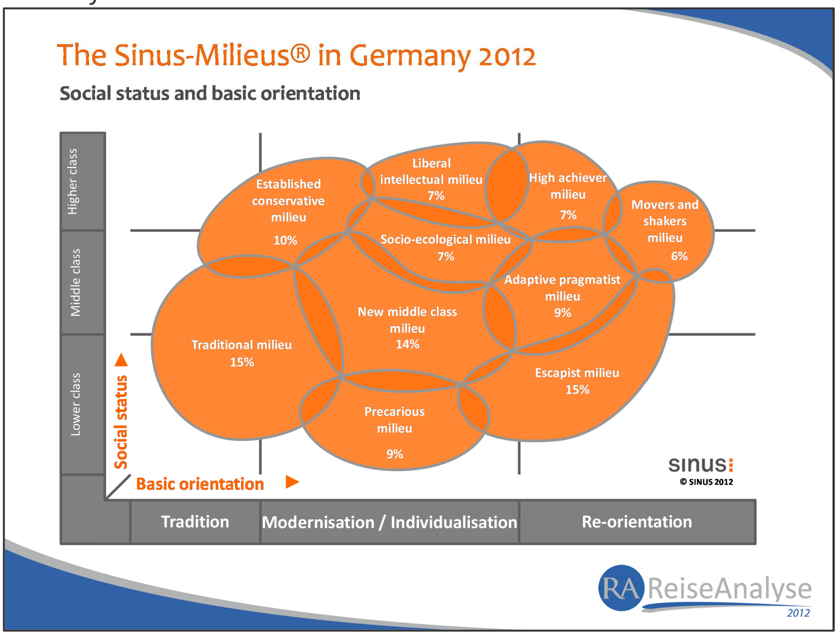
Lifestyles in the RA 2012: Holiday behaviour of the Sinus-Milieus

Combination of lifestyles with holiday behaviour and attitudes by inclusion of the ‘Sinus-Milieus’

As usual, the RA 2012 will survey holiday motives and interests.

Sustainability and nature holidays are further key topics of the RA 2012.

The ‘Sinus-Milieus‘ aim to divide society up into groups of like-minded people regarding their view and way of life. The milieus are a combination of fundamental values as well as everyday attitudes and sociodemographic characteristics. This division into like-minded groups is increasingly also being used in tourism marketing in addition to classic segmentation approaches. The holiday travel behaviour and holiday-related attitudes of the different milieus will be analysed in detail within the RA 2012.



RA ReiseAnalyse 2012

NEW
- coverage of German-speaking foreign nationals
- more details on travel behaviour on short breaks
- additional chart-report

General information and methodology of the RA

The RA 2012 is a representative survey of the holiday travel behaviour of Germans and German-speaking foreign nationals living in Germany, their related attitudes, motivations and interests. The survey describes and analyses holiday trips of 5 days and more as well as short breaks of 2 to 4 days. The RA has been carried out yearly since 1970. Since autumn 2007 the annual face-to-face survey is supplemented by online surveys within the RA *online*.

RA *face-to-face*: Representative for the German-speaking population aged 14 years and above, living in private households in Germany (sampling method: random route). In January 2012, more than 7,500 persons were interviewed personally in their household about holiday-related aspects.

RA *online*: Representative for the German-speaking population aged 14 to 70 years, living in private households in Germany (sampling method: online access panel). Online surveys in May and November with 4,500 respondents in total. Topics focus on online-relevant questions as well as short and city breaks.

Content of the RA 2012

Holiday experience in the past 3 years

More than 80 destinations
More than 25 holiday types

Travel behaviour 2011

Holiday travel propensity, frequency & volume
Short break travel propensity, frequency & volume

Travel behaviour on holiday trips (4+ nights) and short breaks (1 to 3 nights): destination, duration, time of travel, means of transport, organisation, accompanying persons, expenses, type of holiday

Travel intentions 2012
Holiday interests in the next 3 years

More than 80 destinations
More than 25 holiday types

Holiday motives, holiday activities, use of Internet for information and booking, detailed sociodemographic data

Modules for in-depth information on certain topics
Module 1: Images of holiday types
Module 2: Nature holidays: Customer perceptions and product requirements
Module 3: Mobile Internet use for holiday trips

Exclusive and **FUR questions** regarding special topics (possible in the RA *face-to-face* and RA *online*)

Result presentation of the standard question programme
Code book and tabulation volume
Report volume with interpretations
Chart report with central results
Evaluation seminar

Available in addition
Modules: Results in module reports and tabulations
Exclusive and FUR questions: Results in tabulations

Data base and analysis software
Individual reporting

Standard question programme
- Basis: RA *face-to-face* and RA *online* (travel behaviour on short breaks)
- Remains the same every year
- For key data, long-term comparisons of more than 35 years can be made.

Additional question programme
- Basis: RA *face-to-face* and/or RA *online*
- Changes every year
- Some modules topics are repeated every few years.

RA ReiseAnalyse 2012

The Reiseanalyse offers…

Reliable and high-quality data

- Scientific foundation
- Extensive experience and methodological competence
- Personal interviews supplemented by online survey
- Large sample sizes
- Constant standard question programme
- Well-proven question programme

User-friendliness

- User influence on design of the RA
- Evaluation seminar with practitioners
- Individual support for evaluations
- Modular system (only pay for what you need)
- Reasonably priced due to participative character of the survey

Implementation orientation

- Accompanied by the tourism sector through support association
- Detailed structural data
- Future-oriented through data on market potentials
- Quantitative and qualitative aspects
- Long-term time series for key data
- Customised evaluation options

Up-to-date data

- Annually changing modules on current topics
- Exclusive and FUR questions according to individual interests
- RA *online* offers opportunities to react on short notice to current topics

Who is behind the Reiseanalyse?

The RA is carried out by the FUR (Forschungsgemeinschaft Urlaub und Reisen e.V.), an independent user association of tourism research (domestic and international destinations, tour operators, carriers etc.).

The FUR (Rolf Schrader) together with the NIT (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.
Ipsos (Hans-Peter Drews, Doni Boll) carries out the field work and is responsible for the data processing. This team has been working together on the Reiseanalyse for more than 15 years now.

Our partners (selection):

Accor Hospitality
AIDA Cruises
Air Berlin
Center Parcs
Color Line
Costa Kreuzfahrten
Fraport
Gruner + Jahr

IQ media/DIE ZEIT
Landesmesse Stuttgart
RDA
Rewe Touristik/DER
StfT+E
Thomas Cook
VIR

DMOs national:

Baden-Wuerttemberg, Bavaria, Brandenburg, Hamburg, Mecklenburg-Western Pomerania, Lower Saxony, North Rhine-Westphalia, Saxony, Schleswig-Holstein, Thuringia

DMOs international:

Balearic Islands, Denmark, Great Britain, Austria, Poland, Norway, Slovenia, Spain, South Tyrol, Switzerland, Trentino

What does the Reiseanalyse cost?

Basic participation RA 2012

Results of the standard question programme - code book, report volume, chart report, tabulation volume, right to individual analyses

Price EUR 9,900

The basic participation is a precondition for purchasing further parts of the RA (e.g. modules, exclusive questions, data bases)

All prices excl. VAT.

Modules of the RA 2012

- Images of holiday types EUR 4,900
- Nature holidays: Customer perceptions and product requirements EUR 4,900
- Mobile Internet use for holiday trips EUR 4,900
- Use of (print) media (only for publishing houses – price on request)

Exclusive questions

Costs of exclusive questions are calculated on an individual basis. Please contact us, we will be pleased to advise you in this regard.