



## Selected first results of 43rd Reiseanalyse for ITB 2013



**41 million** persons in Germany would like to go  
on a sun&beach holiday in the next three years



The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the current Reiseanalyse 2013.

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: Record spending on holidays

**Record spending on holidays: more than € 63 billion for holiday trips and more than € 20 billion for short holidays**

**Stability regarding the holiday propensity and volume of holiday trips**

**Slightly more short holiday trips than 2011**

**Good perspectives for the holiday year 2013**

**Positive holiday mood!**

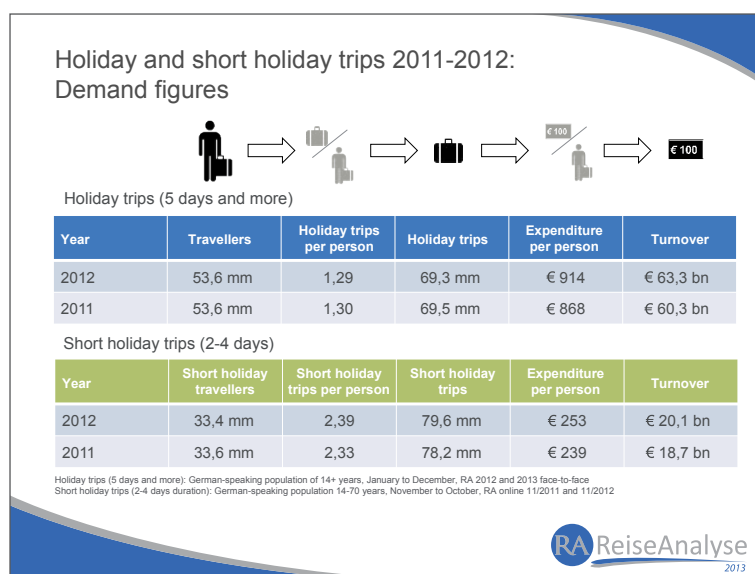
**Plans for holiday expenditure: A little bit more!**

**Assessment of the personal economic situation: stable!**

2012 has been another good year for travelling. Travel expenditure reached new record highs: Spending on holiday trips (5 days and longer) increased by 5% compared to 2011 – to more than € 63 billion. In addition, the expenditure for short holiday trips (2 to 4 days) sums up to more than € 20 billion.

The holiday travel propensity remained stable at more than 76%. This is the proportion of the population (70.2 million people: 14+ years, German-speaking in private households) which has undertaken at least one holiday trip of 5+ days in 2012.

The volume of almost 70 million holiday trips has also remained stable. Short holiday trips totalled almost 80 million in 2012, a slight increase of 1.4 million trips compared to 2011.



The outlook for 2013 is also positive. At the beginning of the year, most people in Germany are already in 'holiday mood': 55% of the population have concrete travel plans, only 12% are certain that they will not go on holiday in 2013. Most are planning with the same holiday budget as the year before, 12% want to spend even more, 10% less than in 2012. All figures are almost on par with the previous year's level.

For the actual realisation of travel plans, the assessment of the personal economic situation and its future development is particularly important. And again, we find stability compared to the beginning of 2012. In January 2013, 16% expected a positive development of their personal economic situation in the next 12 months, 14% a change for the worse and most people did not expect any change at all.

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

Text: Rolf Schrader, Ulf Sonntag

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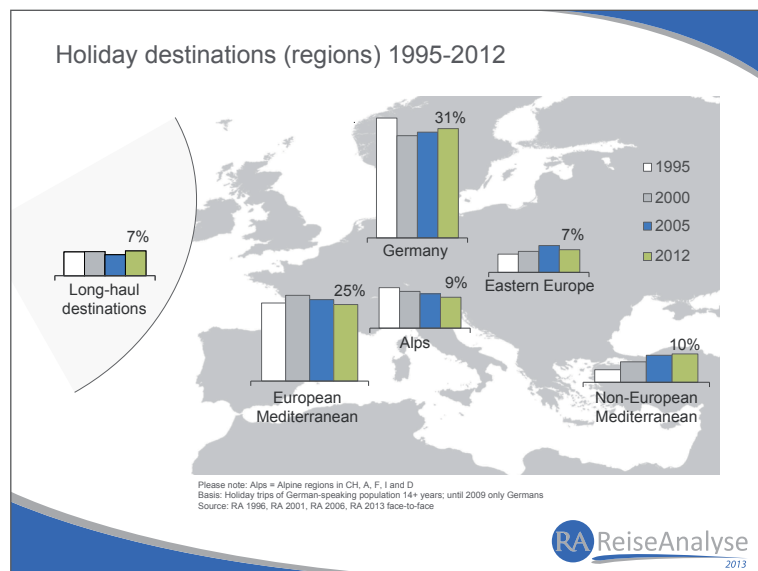
## Holiday destinations: Well-known favourites

Almost 40% of travellers have been to their holiday destination 2012 for the first time. In addition, individual travellers like to switch among familiar destinations from year to year. At the same time, the German population in total shows a very constant pattern over the years: With a market share of 31% of all holiday trips, Germany is again the most popular holiday destination 2012. Spain, Italy, Turkey and Austria follow in the ranking. Almost two thirds of all annual holiday trips lead to one of these five destinations. Also within Germany, we observe a well-known ranking.

Still, there are dynamics. According to the expressed destination interests in the next three years, the German coast, Scandinavia, Turkey and destinations in Asia will have opportunities for positive developments on the German market. BUT: The interest for many regions is increasing. This indicates once more the flexibility of the customers – travellers are multi-optional which means that many destinations are able to satisfy their specific holiday needs.

**2/3 of all holiday trips are undertaken to only five destinations: Germany, Spain, Italy, Turkey and Austria**

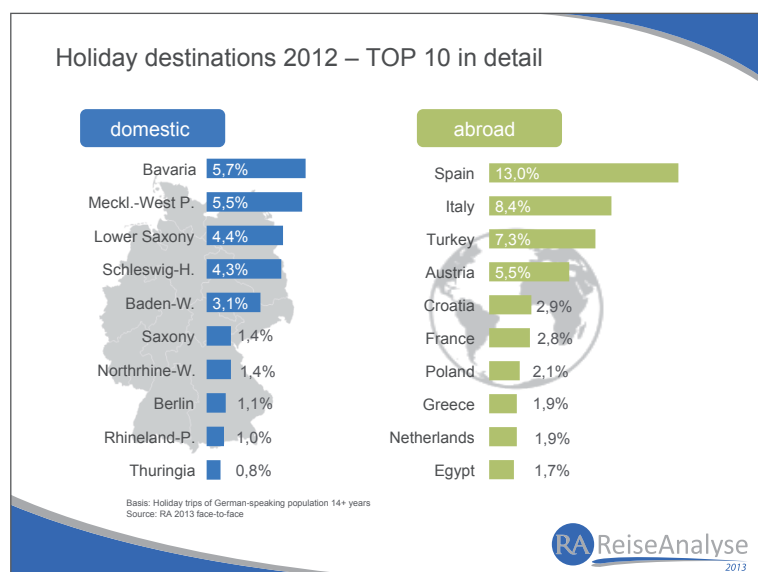
**Long-term stable market shares in the big destinations**



**DOMESTIC:**  
Holidays on the coast or in the South are preferred.

**ABROAD:**  
Spain is well ahead of Italy, Turkey and Austria

**Egypt in the TOP 10 again**



**Flexible and multi-optional customers**

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: Car and hotel are most important.

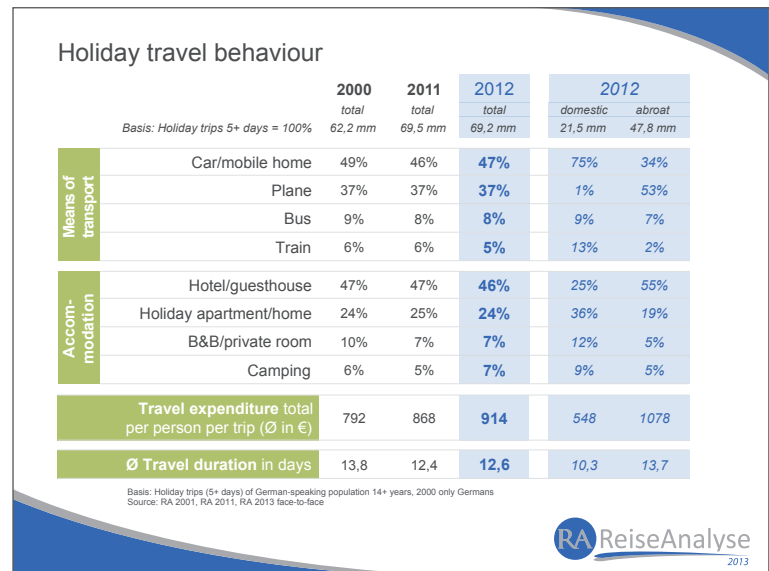
**Duration: No further decline in 2012**

**Holiday expenditure at record high: € 914 per person and trip**

**Means of transport: car and plane most important**

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

Against the long-term trend towards shorter holidays, the holiday duration did not further decline in 2012. Holiday expenditure increased to a new record level of € 914 per person and trip. Concerning the means of transport, car and plane were leading by far. Holiday accommodation was dominated by hotels, followed by holiday apartments and homes.



## Travel organisation and booking: Internet drives the change

**Holiday organisation: Package holidays are most important.**

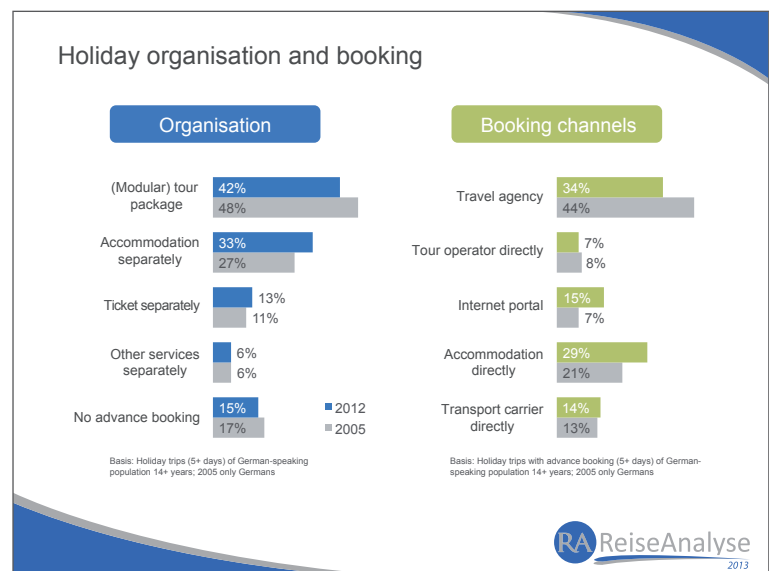
**Booking channels: Travel agencies still dominate the market.**

**BUT: Structural change in the long run**

**WINNERS: Internet portals and accommodation providers**

**LOSERS: Travel agencies and package holidays**

Mainly due to the internet, direct bookings are becoming easier and more comfortable. Hence, there is a growing tendency for consumers to book single holiday services directly rather than in a package. Although the package holiday still remains the most important type of organisation and the travel agency the most important booking channel, a structural change in favour of single bookings, internet portals and accommodation providers is in progress.





## Holiday types: More sun, more family, more culture *light*

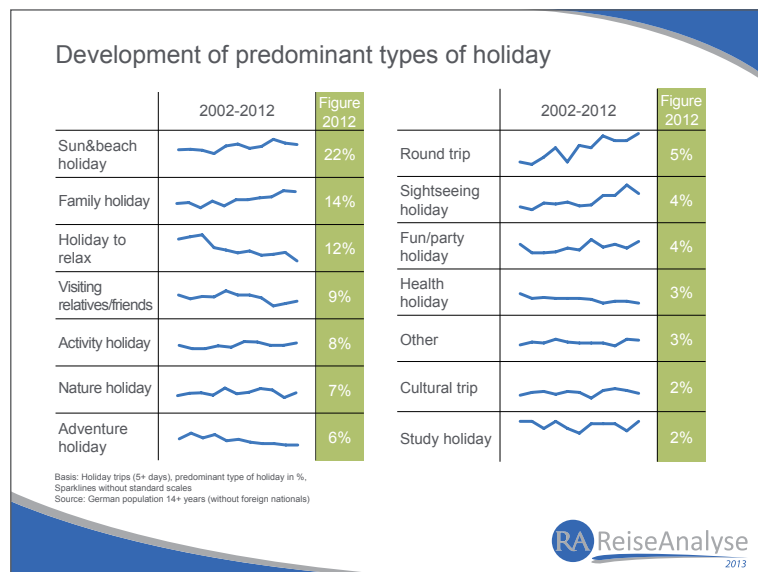
In 2012, the most important holiday type for Germans was the sun&beach holiday, followed by family holidays and holidays to relax. The last decade showed a significant decline of the demand for holidays to relax and clear increases for sun&beach and family holidays. Round trips and sightseeing holidays have also increased over time. With a stagnation of culture and study holidays at the same time, a lot of Germans seem to want more culture *light*, but not necessarily more *pure* culture.

**Sun&beach holiday most important, followed by family holidays and holidays to relax**

**Holiday to relax and adventure holiday continuously decreasing**

**Beach holiday and family holiday increasing**

**Rather more culture *light* than more *pure* culture**



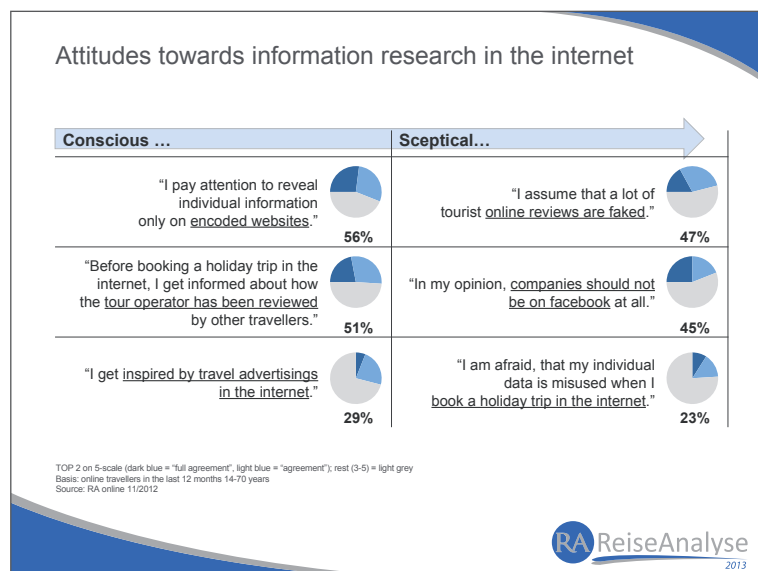
## Information on the internet: Conscious with healthy scepticism

55% of the German population have already used the internet for holiday information, further increases are to be expected. While surfing the internet for travel planning, consumers show a well-informed and reflective attitude. We can clearly see how consciously customers are acting and that they tend to interpret the gathered results with healthy scepticism.

**55% already used the internet to look for information about holidays.**

**Well-informed consumers**

**Very conscious and with healthy scepticism**



## Destination interest in the Mediterranean area: Crisis countries loose!

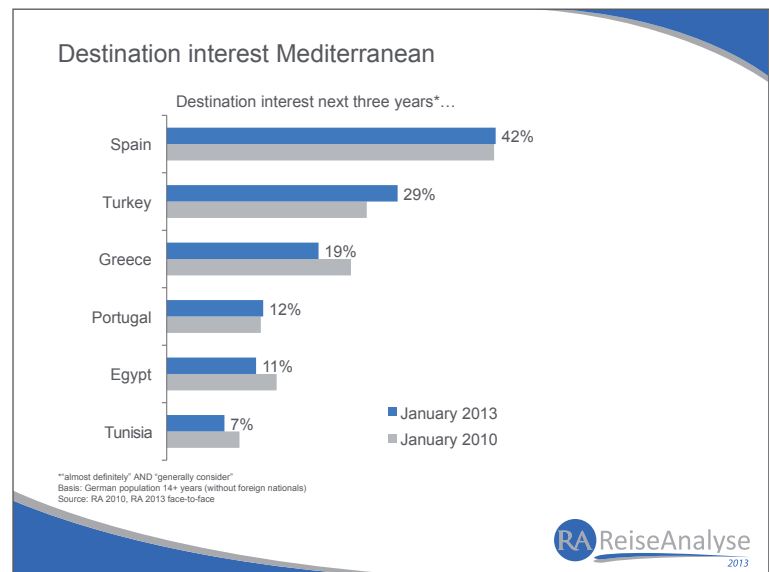
**Economic and political uncertainty in many holiday destinations**

**Overall demand is stable, but since 2010 changes in destination preferences**

**LOSERS:**  
Greece, Egypt, Tunisia

**WINNERS:**  
Turkey and Spain

In many holiday destinations popular with Germans, political and economic turmoil took place in 2011 and 2012. Until now, those had no direct impacts on the overall holiday demand, but in detail holiday destination preferences indeed have shifted. Looking at the future potentials as well as at the actual demand, the decline in Greece is the most relevant. Also affected: Egypt and Tunisia. But here, the actual demand again increased to some extent in 2012. Turkey (rise in expressed interest) and Spain (rise in actual demand) are benefitting most from the current situation.



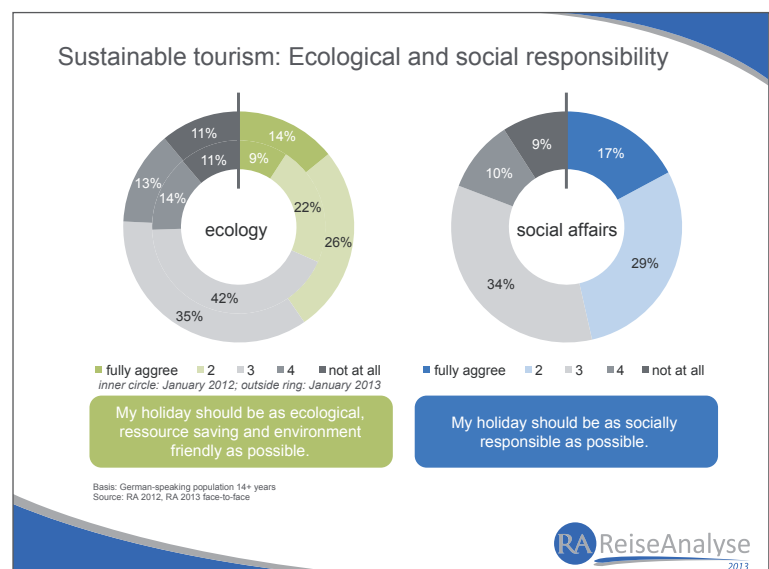
## An increasing number of customers prefer sustainable holidays.

**Sustainability becomes more important for the tourism industry: Both in supply and demand.**

**At the beginning of 2013, 40% prefer an ecologically sustainable holiday.**

**46% would like their holidays to be socially responsible.**  
(i.e. fair working conditions for staff and respect for the local population)

While organic fruits and fair trade coffee have been mass compatible for quite a while, the calls for ecologically and socially correct travel experiences are only recently getting louder. Currently, 40% of the population ask for environment friendly holidays (last year: 31%). Social sustainability of holidays is important for even 46% of the population.



## New RA publication on Sinus-Milieus and holiday trips

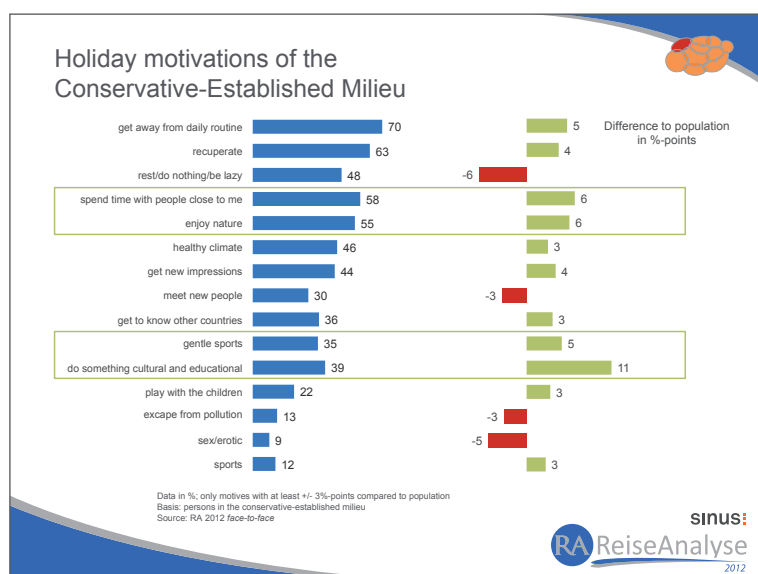
In the Reiseanalyse 2012, FUR carried out a baseline study with the Sinus-Milieus for the first time. For that purpose, an indicator question was integrated in the face-to-face survey which allowed analysing the combination of milieus and RA-data regarding holiday travel behaviour, tourist attitudes and interests. In the RA 2013, the Sinus-Milieus are included again and the respective results will be available to all clients.

The Sinus-Milieus group together people with similar attitudes and ways of life. The milieus are a combination of fundamental values as well as everyday attitudes and socio-demographic characteristics. This division of society in "like-minded" groups is increasingly used in tourism marketing in addition to classical segmentation approaches.

The newly published study "Urlaubsverhalten und soziale Milieus" gives an introduction to the methodology of the Reiseanalyse and the Sinus-Milieus. In the centre of the study, the specific tourist features of each milieu group are being analysed. With this knowledge about how different milieus live in daily life and on holidays, a deeper understanding for their requirements, desires and preferences can be obtained which is very helpful for product development/optimisation and to improve the consumer communications.

The following key questions are answered in the study:

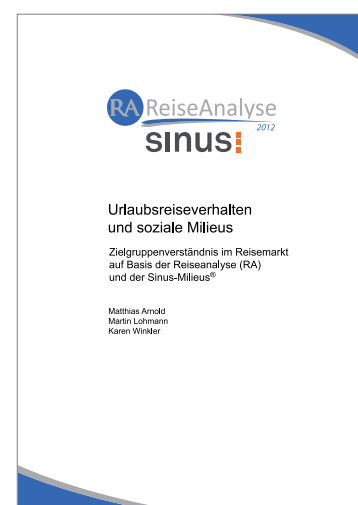
- ▶ How does the Reiseanalyse work and what aspects of tourist demand are covered?
- ▶ What are Sinus-Milieus and what can they be used for?
- ▶ How do the Germans travel generally?
- ▶ Which milieus exist in the German population and what are the characteristics of the single milieus?
- ▶ Which travel behaviour and which tourist attitudes are 'typical' for each milieu?
- ▶ Are particular milieus more or less represented in specific tourism demand segments?
- ▶ What are the best ways to communicate with the milieus?



### Sinus-Milieus in RA 2012 and RA 2013

**Combination of lifestyles with holiday travel behaviour and attitudes by inclusion of the "Sinus-Milieus"**

**New (in German only!)**



**The study is available now from the FUR (costs: € 990 plus VAT), [www.reiseanalyse.de](http://www.reiseanalyse.de).**

**One example:  
Holiday motivation of the Established-motivation Conservative Milieu differs from the population: E.g. more culture and nature, less relaxing.**

## You are invited to participate in the Reiseanalyse 2013!

The RA 2013 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 2007 the annual face-to-face survey is supplemented by online surveys within the RA *online*.

The results can be analysed for all Germans and the German-speaking foreign nationals living in Germany separately.

**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 2013, more than 7,500 persons have been 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 2012 with 5,000 respondents. Topics focus on online-relevant questions as well as short and city breaks.

## Who is behind the Reiseanalyse?

The RA is carried out by the FUR (Forschungsgemeinschaft Urlaub und Reisen e.V.). The FUR is neither a market research institute nor a management consultancy. Above all, it is an independent association of domestic and international users of tourism research in Germany and a non-profit organisation commissioning tourism research projects. With the help of the "Reiseanalyse" FUR elaborates research achievements to a value of € 500,000 and above. According to the statutes, FUR does not make any profit, but reinvests any surpluses completely into research work.

The FUR (Rolf Schrader) together with the NIT (Institute for Tourism Research in Northern Europe: Prof. Dr. Martin Lohmann, Ulf Sonntag) are in charge of the organisational and scientific aspects of the survey. Ipsos (Doni Boll, Hans-Peter Drews) 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.

### Users of the Reiseanalyse (Selection):

#### Accor Hospitality

AIDA Cruises

Air Berlin

Center Parcs

Color Line

Fraport

Gruner + Jahr

Hochschule München

IQ media/DIE ZEIT

#### Landesmesse Stuttgart

RDA

Rewe Touristik/DER

Studienkreis für Tourismus

und Entwicklung

Studiosus

Thomas Cook

Tropical Islands

VIR

#### DMOs national:

Baden-Wuerttemberg,

Bavaria, Hamburg,

Mecklenburg-Western Pomerania,

Lower Saxony,

North Rhine-Westphalia, Saxony,

Schleswig-Holstein, Thuringia

#### DMOs international:

Austria, Balearic Islands,

Belgium, China, Denmark,

Germany, Great Britain,

Iceland, Liguria, Luxemburg,

Norway, Poland, Slovenia,

Spain, South Tyrol,

Switzerland, Trentino

## What does the Reiseanalyse cost?

### Basic participation RA 2013

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

Price € 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 2013

- ▶ Family holiday – Travelling with children € 4,900
- ▶ Travel decision-making € 4,900
- ▶ Holiday information and Social Media € 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.