RA ReiseAnalyse
2014

Selected first results
of 44th Reiseanalyse for ITB 2014

On 47% of all holiday trips in 2013, two were travelling together.

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The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the current Reiseanalyse 2014.

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: There have never been so many holiday trips

78% of the population took at least one holiday trip

Nearly 71 million holiday trips with a total expenditure of more than 64 billion Euros

Record figures for holiday trips (5 days and longer). There have never been more people on more trips than in 2013. Specifically, nearly 55 million holiday travellers were on the go, taking nearly 71 million holiday trips. With that the holiday travel propensity went up to nearly 78%. That 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 at least 5 days in one year. The total expenditure of holiday trips also increased to a new peak of 64 billion Euros.

Furthermore, there were nearly 76 million short holiday trips (2 to 4 days) with a total spending of 19 billion Euros. In this case, last year's numbers were a little higher.

Holiday and short holiday trips 2012-2013:
Demand figures

Holiday trips(5 days and more)

Year	Travellers	Holiday trips per person	Holiday trips	Expenditure p. p. and trip	Turnover
2013	54.8 m	1.29	70.7 m	€ 906	€ 64.1 b
2012	53.6 m	1.29	69.3 m	€ 914	€ 63.3 b

Kurzurlaubsreisen (2-4 Tage)

Year	Short holiday travellers	Short trips per person	Short holiday trips	Expenditure p. p. and trip	Turnover
2013	33.3 m	2.27	75.6 m	€ 254	€ 19.2 b
2012	33.4 m	2.39	79.6 m	€ 253	€ 20.1 b

Holiday trips (5 days and more): German-speaking population of 14+ years, January to December, RA 2013 and 2014 face-to-face
Short holiday trips (2-4 days duration): German-speaking population 14-70 years, November to October, RA online 5 & 11/2012 and 5 & 11/2013

Good prospects for the 2014 holiday year

Positive holiday mood!

Plans for holiday expenditure: A little bit more!

Assessment of the individual's economic situation: more optimistic

The outlook for 2014 is very positive. At the beginning of the year most people in Germany are already in "holiday mood". 55% of the population has concrete travel plans and only 11% are certain that they will not go on holiday in 2014. Most are planning with the same holiday budget as the year before, 11% want to spend even more than in 2012, and 8% want to spend less. All figures are slightly above the previous year's level.

For the actual realisation of travel plans, the assessment of the individual's economic situation and its future development is particularly important. And again, we find some cause for optimism compared to the beginning of 2013. In January 2014, 18% expected a positive development of their personal economic situation in the next 12 months and 12% a change for the worse. 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: Ulf Sonntag, Rolf Schrader, Martin Lohmann

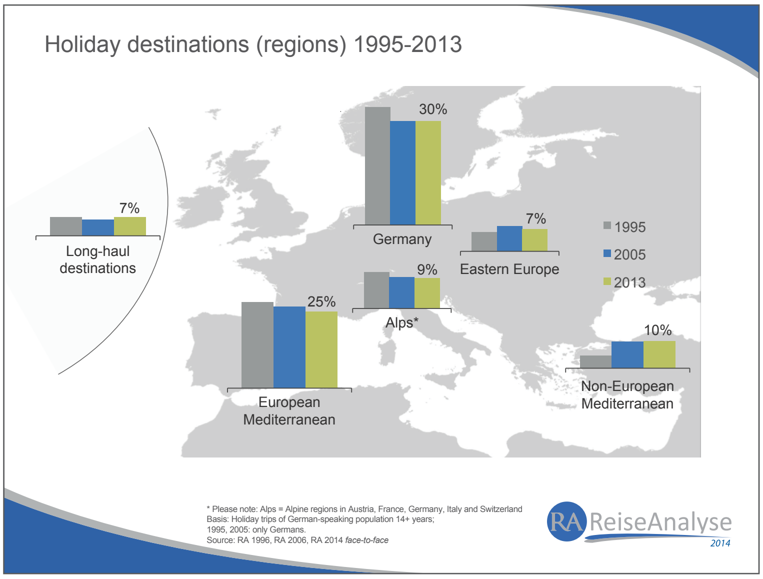
Holiday destinations: Stability for the "big" players

As in previous years, Germany was the most popular holiday destination in 2013, with a 30% market share of all holiday trips. Spain, Italy, Turkey and Austria followed in the rankings. Almost two thirds of all annual holiday trips lead to one of these five destinations. And for holidays within Germany, the ranking of the most popular states remained stable.

Two thirds of all holiday trips are to five destinations: Germany, Spain, Italy, Turkey and Austria

In spite of the stability of the destinations within the total population, individuals like trying something new from time to time – in principle, many destinations are able to satisfy their specific holiday needs. The average German has shown an interest in visiting seven different holiday destinations in the near future. The flexibility of the customer has the positive effect that a crisis in one holiday country does not lead to a decline of the total tourism demand: People just travel somewhere else. It also works the other way round: The "normal" demand recovers relatively quickly once a destination stops getting negative press. Greece is a good example as it managed to regain market share in 2013 and as interest in the destination increased once again.

Long-term stable market share for the main destinations

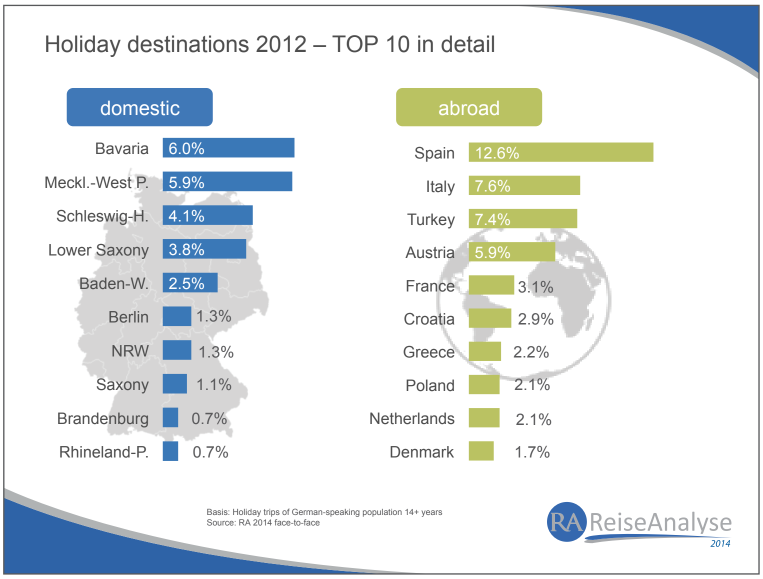


DOMESTIC: Holidays on the coast or in the South are preferred.

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

Greece is regaining market share

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: Holiday duration decreasing

High holiday expenditure again: € 906 per person per trip

Means of transport: car and aircraft most important

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

2013 once again confirmed the long-term demand trends in relation to the duration of holiday trips, the spending, the means of transport and the accommodation. The average trip length decreased to 12.4 days, the lowest so far. The holiday expenditure of € 906 per person per trip remained at the same high level of the previous year. By far the most popular means of transport were car and aircraft. Holiday accommodation was dominated by hotels, followed by holiday apartments and homes.

Holiday travel behaviour

	Basis: Holiday trips 5+ days = 100%	2000 total 62.2 mn	2012 total 69.2 mn	2013 total 70.7 mn	2013 domestic 21.5 mn	2013 abroad 49.2 mn
Means of transport	Car/mobile home	49%	47%	45%	73%	33%
	Aircraft	37%	37%	38%	1%	54%
	Bus	9%	8%	8%	9%	7%
	Train	6%	5%	6%	15%	2%
Accom-modation	Hotel/guesthouse	47%	46%	47%	29%	55%
	Holiday apartment/home	24%	24%	24%	36%	20%
	B&B/private room	10%	7%	6%	11%	5%
	Camping	6%	7%	6%	8%	5%
	Travel expenditure total per person per trip (Ø in EUR)	792	914	906	550	1.061
	Ø Travel duration in days	13.8	12.6	12.4	10.1	13.4

Basis: Holiday trips (5+ days) of German-speaking population 14+ years, 2000 only Germans
Source: RA 2001, RA 2013, RA 2014 face-to-face

Travel organisation and booking: More direct bookings

Holiday organisation: Package holidays are most important

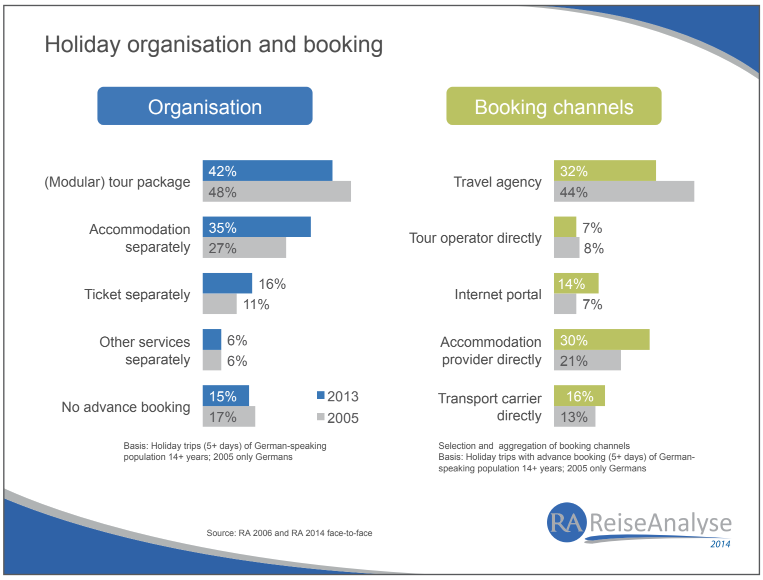
Booking channels: Travel agencies still dominate the market

BUT: Structural change in the long run

WINNERS: Accommodation providers and internet portals

LOSERS: Travel agencies and package holidays

Although the package holiday still remains the most important form of organisation, and the travel agency the most important booking channel, a structural change in favour of direct bookings, accommodation providers and internet portals is underway. The main driver behind this trend is the continuously growing number of online bookings, up from 11% of all pre-booked holiday trips in 2005 to 31% in 2013.



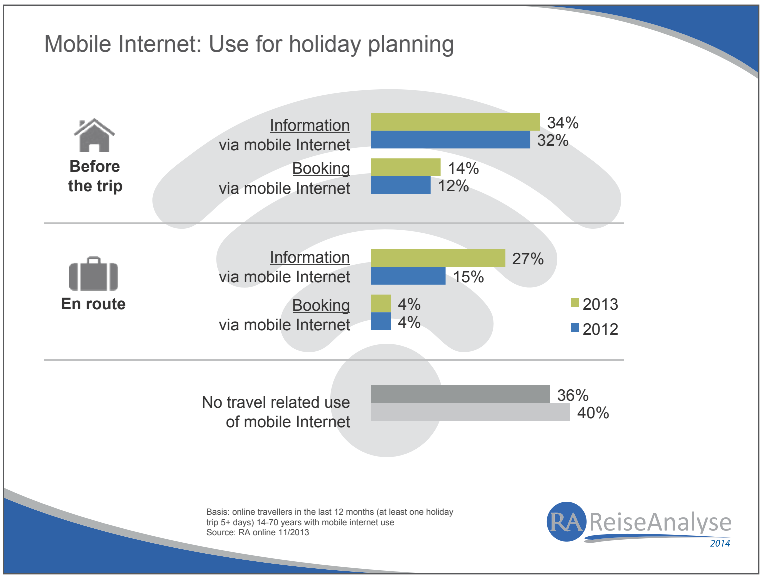
Customer Journey: Touchpoints during and after the holiday

The RA 2014 analyses the “Customer Journey” of holiday makers from the collecting of holiday information to the booking decision and finally to whether they were satisfied and would recommend the trip. Insights into communication en route and on sharing of holiday experiences are new aspects. In this case, the tourist is both the user and the source of information.

More than half of the population uses mobile internet

The usage of mobile internet for finding holiday information en route is growing

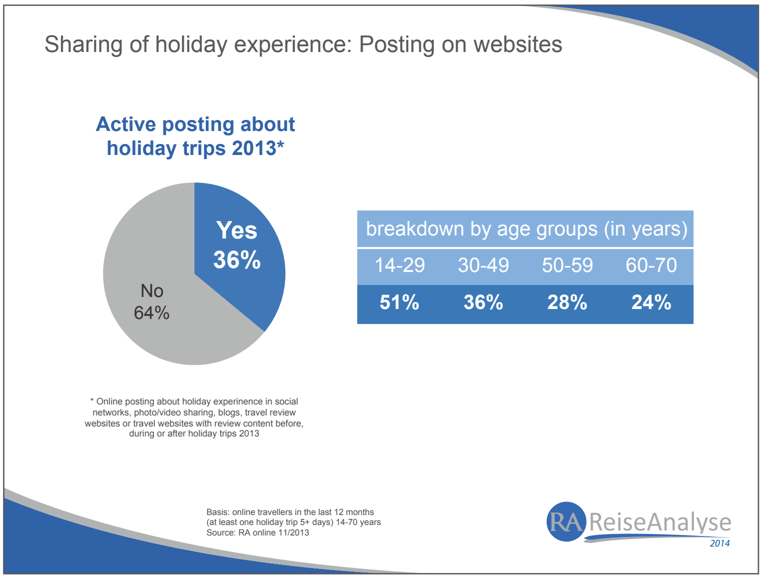
52% of the German population currently use mobile internet (2011: 13%). Smartphones and tablets are also important channels for information about holidays. This information is often requested en route: In 2013, 27% of users looked for holiday information via the mobile internet whilst travelling – this number has nearly doubled within one year. In contrast, the booking of travel services so far only plays a minor part when being on holiday.



36% of travellers who are online shared their last holiday experiences on the internet, for example through posting on social networks, blogs, picture or video platforms, review websites or commenting tools on booking portals. It is interesting to note that not only young people post on the internet, but that 24% of the 60 to 70 year olds share their holiday experiences on the net.

One third of online travellers post their travel experiences on the internet

More information in the module “Customer Journey and sharing of holiday experiences”



RA ReiseAnalyse 2014

Sustainable travel is desirable for many people

Emphasis on sustainable tourism in the RA 2014

The majority of tourists have a positive attitude towards sustainable travel

Consumers accept their own responsibility, but they also see the obligations of the tourism industry and the state

Necessary for more sustainable holiday demand:

- ► **It shouldn't be more expensive than a "normal" holiday**
- ► **Should suit holiday needs**
- ► **Information**
- ► **A wide range of offers**

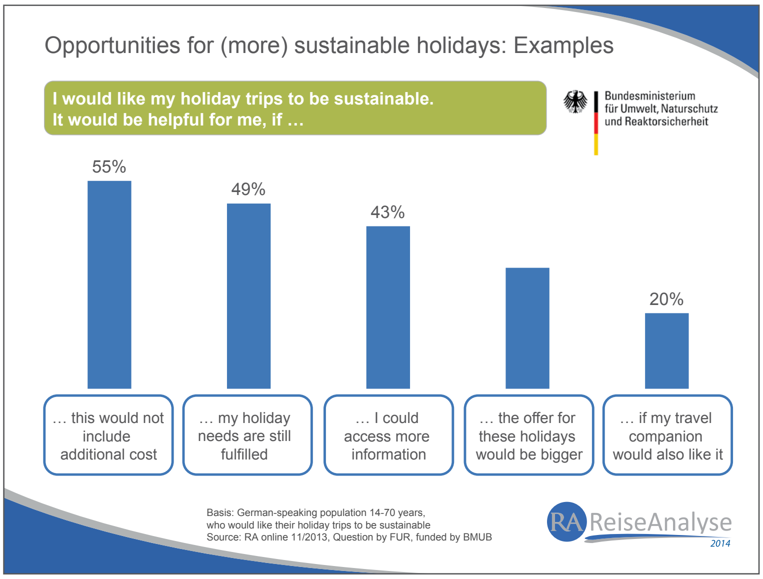
A positive outlook for more sustainable travel habits in the future

More information on this subject in the module: "Sustainable holidays: Acceptance and potentials"

Just as in other spheres of life, sustainability in tourism is no longer a niche market. A good part of the tourism industry and more and more customers are concerned with different aspects of sustainability before or on their trip. For this reason, the RA 2014 looks at the demand from various angles. Firstly in a module on the potential of sustainable travel behaviour, and secondly using the support of the Federal Ministry for the Environment (BMUB) to include questions about attitudes, decision factors and opportunities for the future of sustainable tourism. The results show that sustainability is an important issue for a majority of tourists. They accept their own responsibility in this field but at the same time also see the obligations of the tourism industry and of the state.

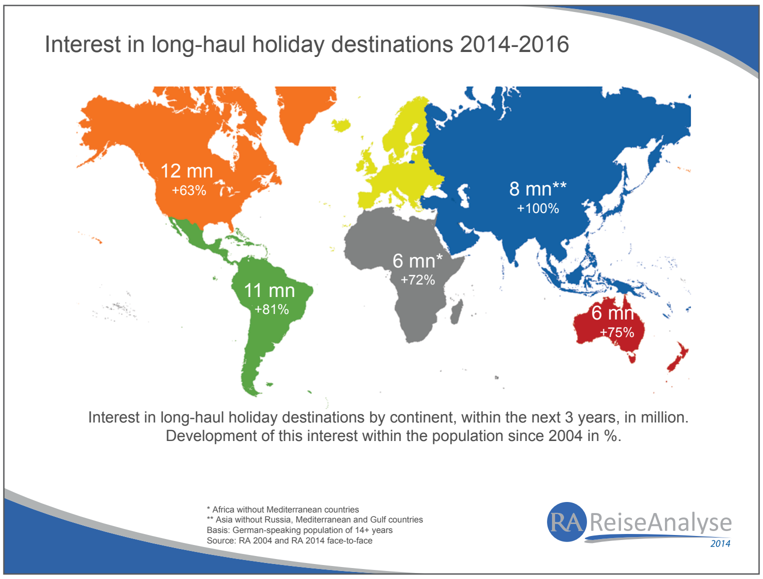
In 2013, for one million travellers sustainability was the most important decision criterion. Six million travellers stated that sustainability was one of several factors in the organisation of their holiday. If we look at the different dimensions of sustainability, we see that 22 million people pursue an ecologically friendly holiday experience and 26 million pay particular attention to social acceptability. Looking to the future, 36 million people would like their holiday trips to be sustainable.

What can be done to help this large number of people to transform their generally sustainable holiday attitude into action? Here are some important indications for the tourism industry: A sustainable trip shouldn't be more expensive than a "normal" one, the basic holiday needs have to be fulfilled and the right information about a broad, suitable and accessible range of offers for sustainable tourism has to be in place. The potential for more sustainable tourism on the German market is definitely there.



Log-haul destinations: Interest is increasing, especially for Asia

With a market share of 7% of all holiday trips, long-haul trips are an important business for many tour operators, and Germans are welcome guests in faraway destinations. The Germans' wanderlust has increased in the last 10 years - the biggest interest can be found in North America whereas Asia shows the highest growth.



12 million dream of a holiday in North America in the next three years

In the last decade interest in holidays in Asia has doubled

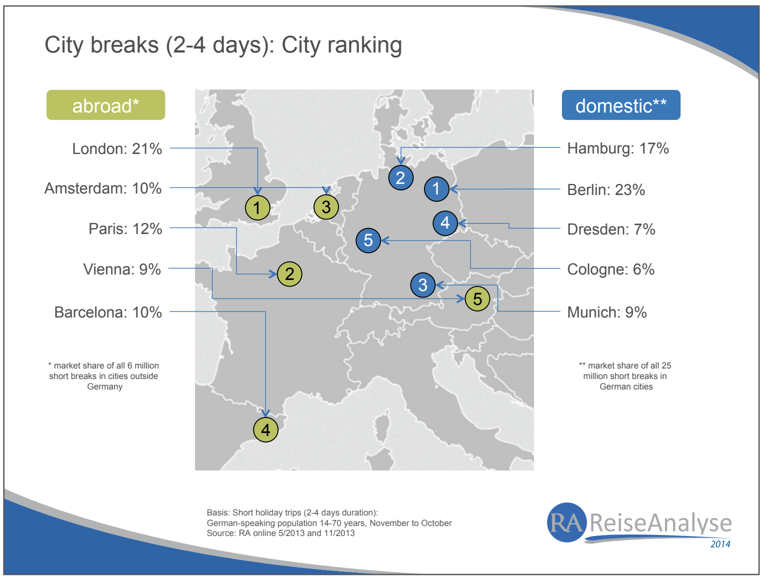
It's also looking good for individual countries, e.g.:

MÉXICO

5 million showed an interest up 95% since 2004

City breaks: The boom is still on

City tourism is one of the few areas in tourism with a clear long-term upward trend. At the beginning of 2014, 43% of the German population expressed their interest in going on a city trip within the next three years and 25% could bring recent experiences to mind. These figures mean that demand and interest have approximately doubled since 2000. City trips are mainly short trips. In Germany the most important destinations in 2013 were Berlin, Hamburg, Munich and Dresden, and abroad they were London and Paris.



Demand and interest in city trips have approximately doubled since 2000

City trips are mainly short trips

Domestic: Berlin leading Hamburg, Munich and Dresden

Abroad: London leading Paris and Amsterdam

RA ReiseAnalyse 2014

RA 2014 Highlights:
- Vast Longitudinal Database - Easy Trend Analysis
- Interesting Modules (Customer Journey and Sustainable Holidays)
- Sinus Milieus

You are invited to participate in the Reiseanalyse 2014

The RA 2014 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 kinds of different segments, e.g. all Germans and the German-speaking foreign nationals living in Germany separately.

RA *face-to-face* survey: Representative for the 70.3 million German-speaking people aged 14 years and above, living in private households in Germany (sampling method: random route). In January 2014, more than 7,500 people have been interviewed personally.

RA *online*: Representative for the 59.4 million German-speaking people aged 14 to 70 years, living in private households in Germany (sampling method: online access panel). Online surveys in May and November 2013 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. In accordance with the statutes, FUR does not make any profit, but completely re-invests any surpluses 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 20 years now.

User of the Reiseanalyse (Selection):

Accor Hospitality **AIDA Cruises** **Costa Kreuzfahrten** **DER Touristik** **Fraport** **Gruner + Jahr** **Hochschule Kempten** **IQ media/DIE ZEIT** **Legoland Deutschland**	**Landesmesse Stuttgart** **RDA** **Stena Line** **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, Catalunya, China, Denmark, Germany, Great Britain, Iceland, Liguria, Luxemburg, Norway, Poland, Slovenia, Spain, South Tyrol, Switzerland, Trentino

What does the Reiseanalyse

Basic participation RA 2014

Results of the standard question programme - Report volume with interpretations, method volume, individual tabulations, evaluation seminar, right to additional 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 2014

- Customer Journey and sharing of holiday experiences € 4.900,-
- Sustainable holidays: acceptance and potentials € 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 and we will be pleased to advise you in this regard.