


RA ReiseAnalyse

2015

Selected first results of 45th Reiseanalyse for ITB 2015

 In their holidays, 62% of the population like to swim in the sea

The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the Reiseanalyse 2015. In addition to the current data we will give a brief insight into the trends in holiday travel behaviour up to 2025. This information is based on the new RA Trend Analysis. You can find more information about this publication on page 7 of this document.

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

Total holiday travel expenditure of € 67 billion

77% of the population took at least one holiday trip

More than 70 million holiday trips in total

Good prospects for the 2015 holiday year

Positive holiday mood

Plans for holiday expenditure: preferably a little bit more

Assessment of the individual's economic situation: optimistic

Travel expenditure reached new record highs in 2014: Spending on holiday trips (5 days and longer) increased by 5% compared to the previous year – to more than € 67 billion. In addition, the expenditure for short holiday trips (2 to 4 days) amounts to almost € 20 billion.

Other key figures remain quite stable and at a high level: Nearly 55 million holiday travellers took a total of more than 70 million holiday trips in 2014. With that the holiday travel propensity equalled more than 77%. That is the proportion of the population (70.5 million people: 14+ years, German-speaking in private households) who have undertaken at least one holiday trip of at least 5 days in one year. Furthermore, there were nearly 76 million short holiday trips (2 to 4 days) taken by 33 million travellers.

Trend to 2025 *

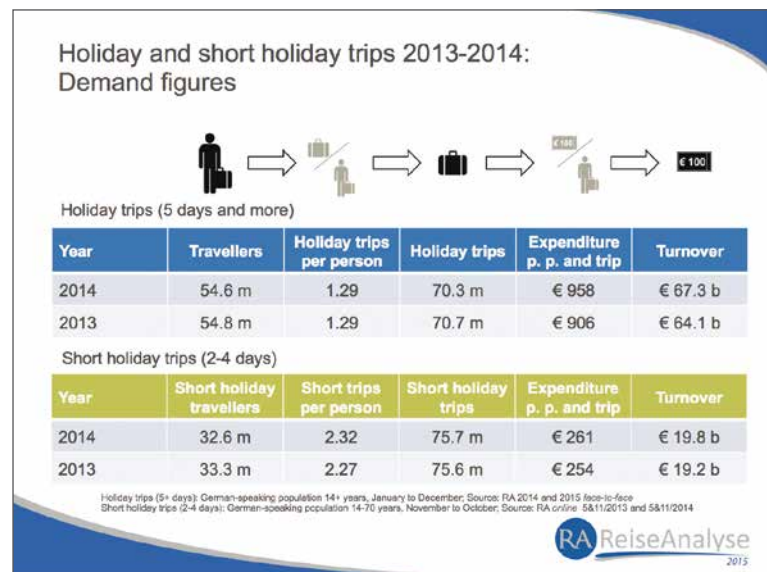
**Holiday trips:
Volume stable
Increasing expenditure**

** more information on page 7*

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

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The outlook for 2015 is 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 2015. Most are planning with the same holiday budget as the previous year, 12% want to spend more than in 2014, and 9% want to spend less. All figures are either on or 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 2014. In January 2015, 18% expected an improvement to their personal economic situation in the next 12 months and 10% a change for the worse. Most people did not expect any change.

Holiday destinations: Growth potential for Germany

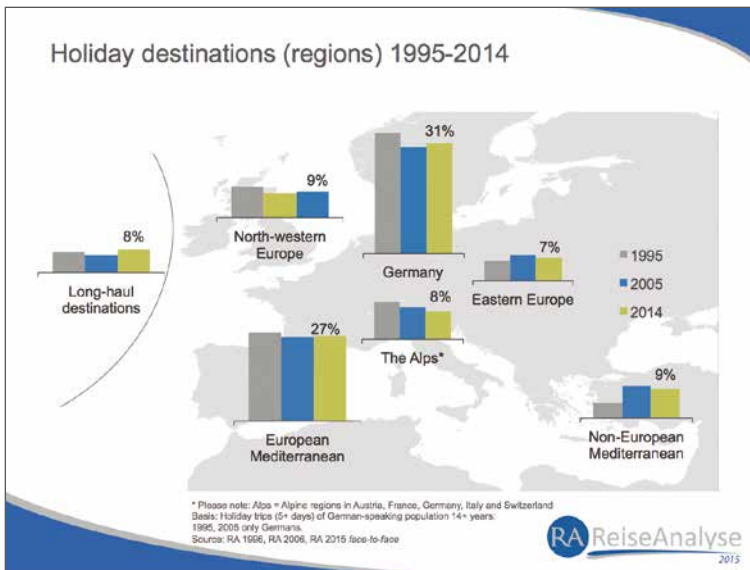
As in previous years, Germany was the most popular holiday destination in 2014, with a 31% market share of all holiday trips. There are many indications that domestic travel will grow even further in the coming years up to 2025. Within Germany there is, and will be, tough competition between Bavaria and Mecklenburg - West Pomerania for first place and between Schleswig-Holstein and Lower Saxony for third place. Generally speaking, the coastal destinations have a certain advantage over the rural and mountain areas.

If we look at travel destinations in terms of major regions, Germany as well as long-haul destinations, e.g. in Asia, have fairly good potential for growth, as do travel destinations in North-western Europe. The significance of the Mediterranean as a destination as a whole tends to remain stable. Spain remains the uncontested “top dog” with a current market share of more than 13%. Italy and Turkey are competing for the runner-up position. Austria is in fourth place. With an ongoing dynamic, Croatia and Greece can be expected to bump France from its current fifth place in the rankings of foreign destinations.

Germany remains the most popular holiday destination: Holidays on the coast or in the South are preferred.

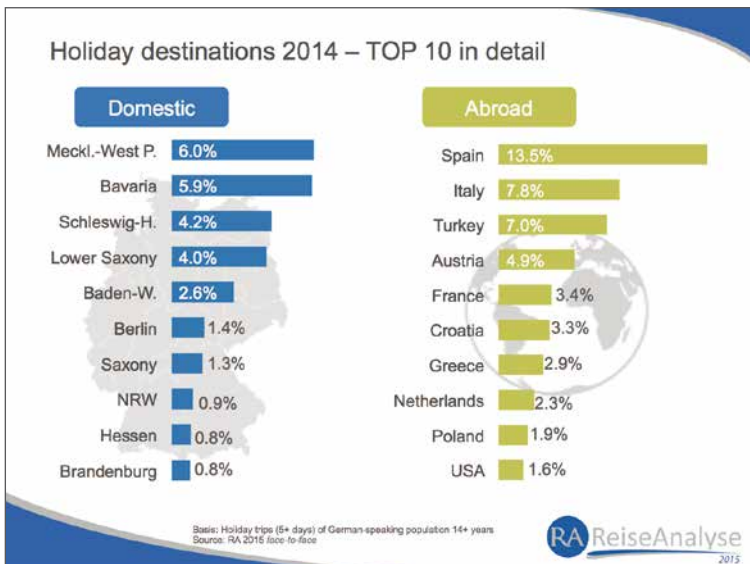
Abroad, Spain is well ahead of Italy, Turkey and Austria

Long-term stable market share for the main destinations



Trend to 2025 *
Good growth potential for Germany, long-haul destinations and North-western Europe

** more information on page 7*



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: Air travel with record market share

Record high holiday expenditure: € 958 per person per trip

Means of transport: car and aircraft with most market share

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

The most striking development in holiday travel behaviour in 2014 can be seen in holiday spending. € 958 per person and trip are a new record high. Against the long-term trend towards shorter holidays, holiday duration did not further decline but remained stable at 12.5 days. In regards to means of transport, the aircraft has gained further market share. Holiday accommodation was dominated by hotels, followed by holiday apartments and homes.

	2000	2013	2014	2014		
	total 62.2 m	total 70.7 m	total 70.3 m	domestic 21.4 m	abroad 48.8 m	
Basis: Holiday trips 5+ days = 100%						
Means of transport	Car/mobile home	49%	45%	46%	75%	33%
	Aircraft	37%	38%	39%	1%	55%
	Bus	9%	8%	8%	10%	7%
	Train	6%	6%	5%	13%	2%
Accommodation	Hotel/guesthouse	47%	47%	48%	30%	56%
	Holiday apartment/home	24%	24%	24%	35%	20%
	Camping	6%	6%	6%	8%	5%
Travel expenditure total per person per trip (Average in EUR)						
	792	906	958	582	1,124	
Average Travel duration in days						
	13.8	12.4	12.5	10.3	13.5	

Base: Holiday trips (5+ days) of German-speaking population 14+ years, 2000 only Germans
Source: RA 2001, RA 2014, RA 2015 face-to-face

Types of holiday: Variety, but not too strenuous, please!

Most popular type of holiday: beach/sunbathing holiday

Tendency: Less "only" resting, "only" action and "only" culture

The most popular type of holiday 2014 was the beach/sunbathing holiday, followed by resting and nature holidays. The long-term trend shows a certain tendency away from the extremes (meaning "only" resting, "only" action or "only" culture). Today's multi-optional traveller rather likes to mix different types of holiday, as long as they are not too monotonous or too strenuous. Consequently, types of holiday that fit into this scheme are on a growth path.

Trend to 2025*

Types of holiday that can be mixed and are not too one-dimensional have the biggest growth potential.

**more information on page 7*

	2002-2014	Value 2014	Trend		2002-2014	Value 2014	Trend
Beach/sunbathing holiday		44	↗	Visiting relatives/friends		13	↘
Resting holiday		36	↘	Fun/Party holiday		12	→
Nature holiday		28	↗	Circular tour		11	↔
Family holiday		27	↗	Cultural trip		7	→
Adventure holiday		23	↘	Health holiday		5	↘
Sightseeing holiday		16	↗	Study trip		3	→
Active holiday		16	↔				

Holiday trips (5+ days), type of holiday travel (multiple answers) in %, sparklines without uniform scale, trend: linear regression 2002-2014, German population 14+ years (without German-speaking foreigners), Source: RA 2003-2015 face-to-face

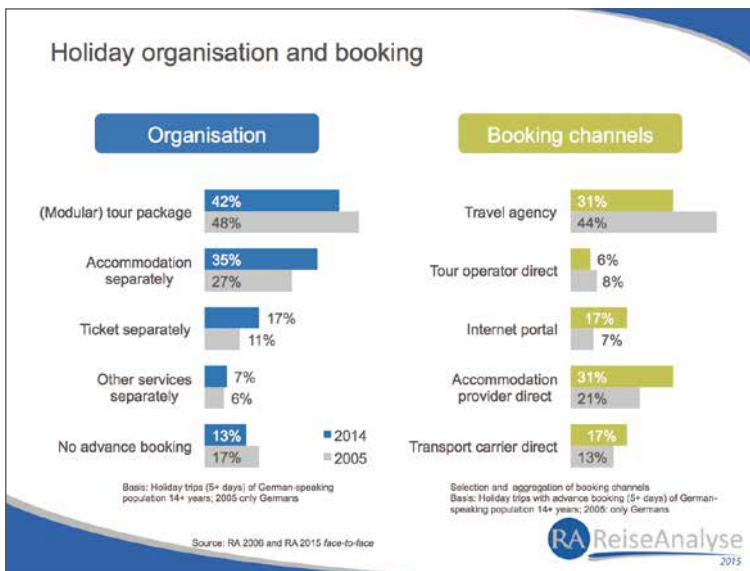
Travel organisation and booking: Internet driving change

Currently, the package holiday remains the most important form of holiday organisation, and the travel agency one of the most important booking channels. Even though a structural change in favour of single 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 35% in 2014. It is expected that even before 2020 the majority of all holiday trips will be booked online.

Package holidays are most significant.

WINNERS:
Accommodation providers and internet portals

LOSERS:
Travel agencies and package holidays



*Trend to 2025**
Even before 2020 the majority of all holiday trips will be booked online.

** more information on page 7*

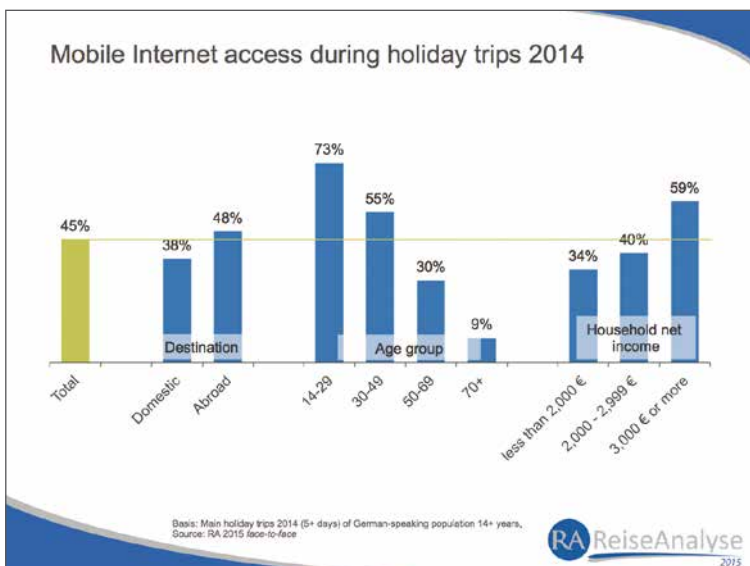
Online en-route: Mobile internet and holiday travel

In January 2015, 56% of the German-speaking population were using the mobile internet – more than four times as many people as only four years ago. Most of them (50% of the population) go online with their smartphone or tablet computer. On 45% of main holiday trips in 2014, people were travelling with and using their smartphones and tablet computers. This figure varies according to travel destination, age and income.

More than half of the population use the mobile Internet.

On almost half of all main holiday trips in 2014 the mobile Internet was used.

Variety of use depending on holiday destination and socio-demography



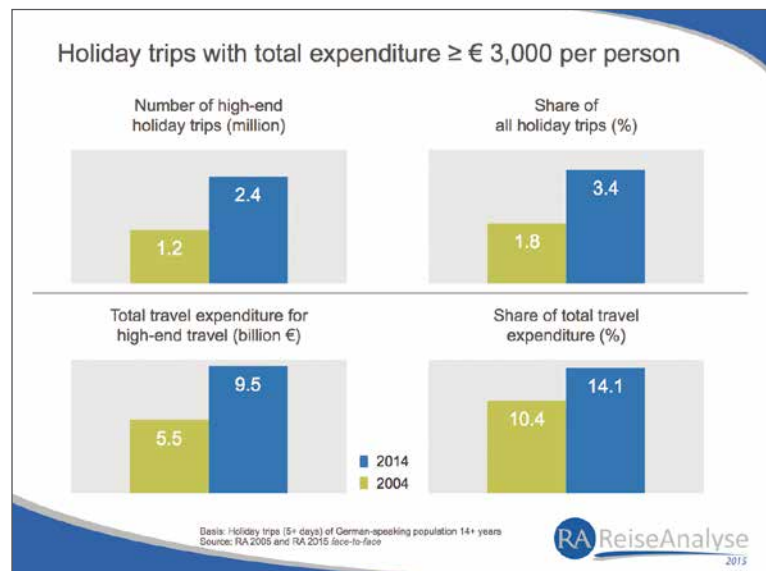
You can find more information in the module "Online en-route: Mobile internet and holiday travel"

High-end holiday travel: Some people don't mind spending a lot

Growing high-end holiday segment (holiday expenditure € 3,000 and more per trip and person)

The number of travellers who don't mind spending a lot of money on their holidays is constantly increasing. The volume of this high-end segment, defined as holiday trips with expenditure of more than € 3,000 per person, has doubled during the last decade, reaching 2.4 million trips in 2014. This equates to more than 3% of all holiday trips. Compared with the total holiday travel expenditure, the weight of the high-end segment is much larger: A total holiday expenditure of € 9.5 billion equals a market share of 14% of all holiday travel expenditure.

Market share: More than 3% of all holiday trips More than 14% of the total holiday travel expenditure



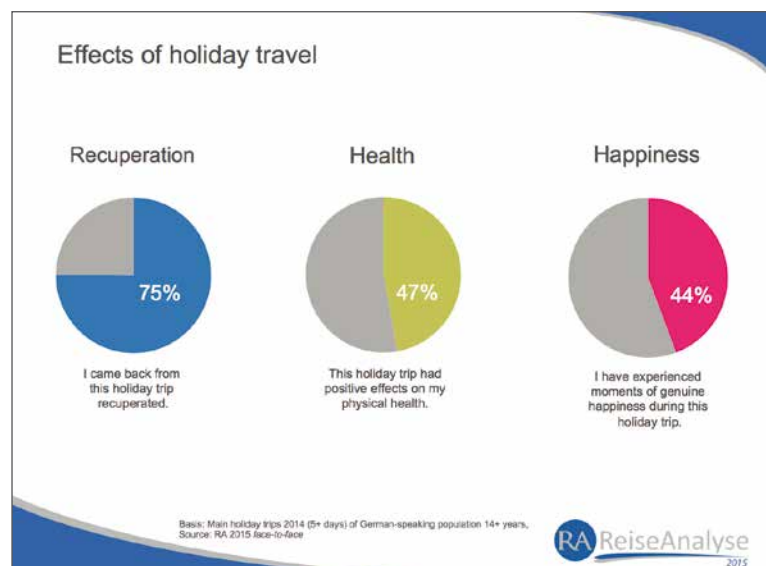
Effects of holiday travel: Recuperation, health, happiness

The vast majority of travellers return home recuperated.

For decades, relaxation and recuperation have been some of the most important motivations for going on a holiday trip. For the first time we are now able to cover the reported effects of main holiday trips 2014. The good news is that the vast majority of travellers return home recuperated. Almost half of the travellers report positive effects on their health. The same proportion experienced moments of genuine happiness during their trips.

Positive health effects or moments of genuine happiness for many

You can find more information in the module "Health-oriented holidays: Trends, potentials, product requirements"



New RA publication “German Holiday Travel 2025”

Tourism is a sunrise industry: You can rely on the future demand of the German market, even in 2025. But – the different trends also encompass a lot of challenges for the tourism industry. These are two key results of the new RA publication „German Holiday Travel 2025: Development of tourism demand in the German source market“.

The authors of the study, Martin Lohmann, Dirk Schmäcker and Ulf Sonntag base their estimates of travel behaviour in 2025 on long time series data from the Reiseanalyse, supplemented by a framework and supply side analysis. In addition to the general trends, four single market segments (holiday trips with children, beach holidays, health holidays and summer holiday in the Alps) are analysed in more detail.



The results of this study show distinct changes to the composition of the customers in the period to 2025. The demographic change will bring us a slightly shrinking but substantially older population. Due to migration this population will also be more diverse. A continuously high interest in holiday travel and a large amount of personal travel experience are reasons for increasingly competent consumers. These consumers are multi-optional and variety-seeking. With technological progress comes a growing reliance on online sources and IT devices.

These customer dynamics reflect in the dynamics of holiday travel behaviour which, on the one hand can be characterised by continuity and stability (e.g. number of holiday travellers, ranking of holiday destinations), while on the other hand showing substantial changes that the tourism industry will be facing (e.g. new target group weights, increasingly higher expectations, changing information and booking behaviour).

The study is available in German and English and costs EUR 590 plus VAT. It has about 180 pages/113 figures and can be ordered directly with FUR.

Reiseanalyse Trend Analysis on holiday travel behavior of the German market in 2025

Framework analysis, Supply side analysis, long time series data on holiday travel demand as a sound basis for trend spotting.

Trend to 2025:

You can rely on the German market

The customers and their expectations are changing

Holiday travel behavior 2025 will be characterised by continuity and change

Now available:



RA 2015 Highlights:

- Access to timeline data since RA 2003 is inclusive
- Easy trend detection with data analysis tool CNTlight
- Interesting Modules (Mobile Internet, Health-oriented holidays, Holiday mobility)
- Sinus Milieus

You are invited to participate in the Reiseanalyse 2015

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 annually since 1970. Since 2007 the annual face-to-face survey has been 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 analysed separately.

RA face-to-face survey: Representative for the 70.5 million German-speaking people aged 14 years and above, living in private households in Germany (sampling method: random route). In January 2015, more than 7,500 people were interviewed personally in their homes about holiday-related aspects.

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 2014 with 5,000 respondents. Topics focus on online-relevant questions as well as short breaks 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. Rather, it is an independent association of domestic and international users of tourism research in Germany and a non-profit organisation commissioning tourism research projects. 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.

Users of the Reiseanalyse (selection)

ADAC
AIDA Cruises
Caravanning Industrie Verband
Costa Kreuzfahrten
Cunard Line
DER Touristik
DRV
Flughafen München
Fraport
Gruner + Jahr
Hochschule Kempten

IQ media/DIE ZEIT
Landesmesse Stuttgart
RDA
Stena Line
Studienkreis für Tourismus und Entwicklung
Studiosus
Thomas Cook
Tropical Islands
Travel Charme Hotels
VIR

DMOs national:
Baden-Wuerttemberg,
Bavaria,
Mecklenburg-Western Pomerania,
Lower Saxony,
Saxony,
Schleswig-Holstein,
Thuringia

DMOs international:
Austria, Balearic Islands,
Belgium, Catalunya, Croatia,
Denmark, Germany, Great Britain, Iceland, Liguria,
Luxemburg, Netherlands,
Norway, Poland, Slovenia,
Spain, South Tyrol,
Switzerland, Trentino

What does the Reiseanalyse cost?

Basic participation RA 2015

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 2015

- ▶ Online en-route:
Mobile Internet and holiday travel € 4,900,-
- ▶ Health-oriented holidays:
Trends, potentials, product requirements € 4,900,-
- ▶ Holiday mobility:
Transport intermodality en route € 4,900,-

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.