



RA ReiseAnalyse

2017

Selected first results
of the 47th Reiseanalyse for ITB 2017

The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the Reiseanalyse 2017.

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

Terrorism influences the Germans' holiday planning

Terrorism affects the choice of travel destinations and the travel behaviour, but does not diminish the overall holiday mood.

For many people in Germany the terrorist attacks in recent years play a role when thinking of their holiday trips 2017. 38% feel that terrorism influences their holiday planning. Of those, many feel generally concerned (50%) or are planning to be particularly careful in their holiday destination (27%). 41% do not wish to go to an Islamic country, 18% avoid their preferred destination. However, almost no one considers not going on holiday at all.

This also shows in the travel intentions for 2017: 69% of people in Germany plan to definitely or probably go on holiday (2016: 70%), only 12% are certain that they will not go on holiday (2016: 12%).

The market development of the past two years seems to continue. It is distinguished by shifts in holiday destinations and travel behaviour, depending on the current overall situation. At the same time, the overall holiday demand of Germans is very stable.

Holiday trip propensity 2016: 77%

€ 88 billion total expenditure for holiday and short holiday trips

Holiday and short holiday trips 2016:
Demand figures



Holiday trips (5 days and more)

Year	Travellers	Holiday trips per person	Holiday trips	Expenditure p.p. and trip	Turnover
2016	53.4 m	1.29	68.7 m	€ 983	€ 67.5 b
2015	53.4 m	1.29	69.1 m	€ 954	€ 65.9 b

Short holiday trips (2-4 days)

Year	Short holiday travellers	Short trips per person	Short holiday trips	Expenditure p.p. and trip	Turnover
2016	33.0 m	2.44	80.5 m	€ 253	€ 20.4 b
2015	31.7 m	2.43	77.1 m	€ 274	€ 21.1 b

Basis: Holiday trips (5+ days): German-speaking population 14+ years, January to December, Source: RA 2017 face-to-face
Basis: Short holiday trips (2-4 days): German-speaking population 14-70 years, November to October, Source: RA online 11/2016

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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For the past year, the Reiseanalyse identifies a stable holiday volume at a very high level: the holiday travel propensity equalled 77% in 2016. That is the proportion of the population who have undertaken at least one holiday trip of at least 5 days in one year. This amounts to 53.4 million holiday travellers who have undertaken 68.7 million holiday trips. Expenditure on those holiday trips amounted to € 67.5 billion.

In addition, 33.0 million short holiday travellers undertook 80.5 million trips of 2-4 days with a total expenditure of € 20.4 billion. Compared to 2015, the amount of short holiday trips shows a slight increase.

Shift of tourist flows in Europe

The uncertainty caused by the terrorist attacks in 2015/2016 has also had an impact on the holiday travel behaviour 2016. This becomes most apparent when looking at the holiday destinations. In comparison with 2015, Turkey loses 23% of holiday trips, Northern Africa records a decline of 29%. Also on the losing side: France with -15%. Winners in the Mediterranean are Spain and Greece. In addition, Germany and some destinations near-by such as Austria, Netherlands and Scandinavia managed to increase their market share.

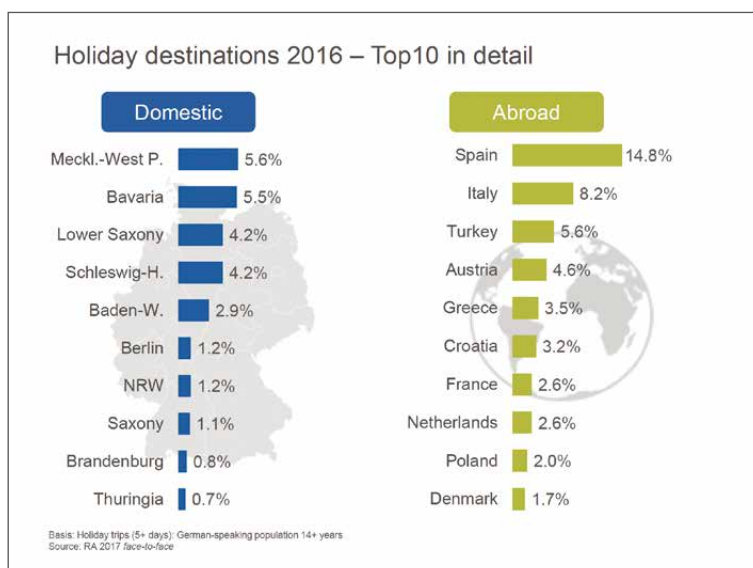
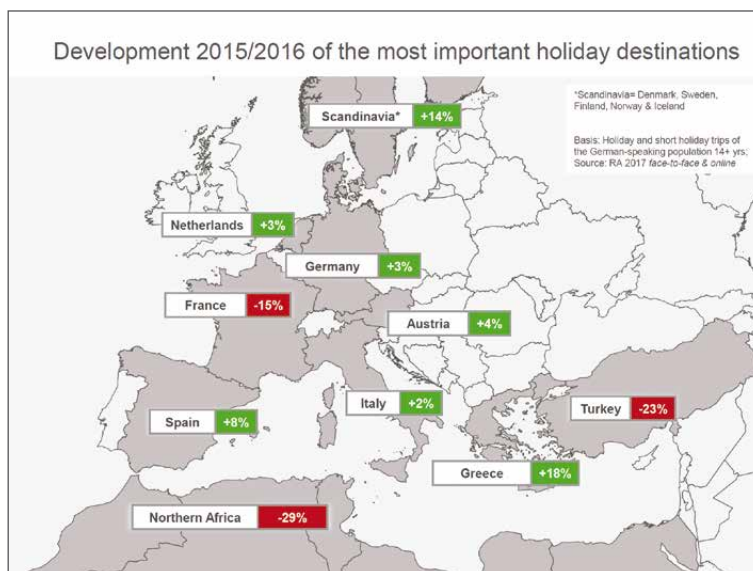
Despite these developments, Turkey and also Egypt remain major holiday destinations for the Germans.

Overall the ranking of the most important holiday destinations remains unchanged: abroad, Spain increases its leading role, followed by Italy, Turkey and Austria. Domestically, especially the TOP 5 can record a growth in market shares, with Mecklenburg-West Pomerania and Bavaria fighting for first place and Lower-Saxony and Schleswig-Holstein for third place.

Notable declines in Turkey, Northern Africa and France.

Growth in Spain and Greece, in Germany and many neighbour countries.

Rankings of travel destinations domestically and abroad stay unchanged.



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: More cars and holiday apartments

Means of transport:
Car most important,
followed by air travel.

The positive development for domestic destinations and nearby countries is accompanied by a slight increase in car travel and a greater use of holiday apartments and homes.

The expenditure for holiday trips was about 3% higher in 2016 than in the previous year, whereas the increase was higher domestically (+ 8%) than for holiday trips abroad (+ 3%).

Accommodation:
Hotels dominate overall.
In Germany, holiday apartments and -houses are most popular.

Growth in travel expenditure

Stability in travel duration

		2000	2015	2016	2016	
		total	total	total	domestic	abroad
Basis: Holiday trips 5+ days = 100%		62.2 m	69.1 m	68.7 m	20.6 m	48.1 m
Means of transport	Car/mobile home	49%	45%	47%	76%	34%
	Aircraft	37%	40%	39%	0%	55%
	Bus	9%	7%	6%	7%	6%
	Train	6%	5%	6%	14%	2%
Accommodation	Hotel/guesthouse	47%	48%	46%	25%	55%
	Holiday apartment/home	24%	23%	26%	38%	20%
	Camping	6%	6%	6%	9%	5%
Travel expenditure total per person per trip (Average in EUR)		€ 792	€ 954	€ 983	€ 601	€ 1.147
Average Travel duration in days		13.8	12.6	12.6	10.3	13.5

Basis: Holiday trips (5+ days) of the German-speaking population 14+ years; 2000 only Germans
Source: RA 2001, RA 2016, RA 2017 face-to-face

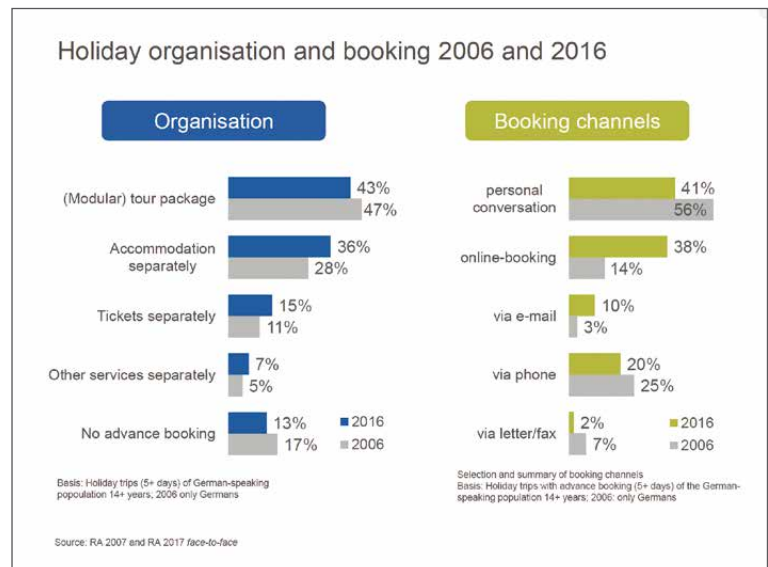
Holiday organisation and booking: Internet is driving the change

Long-term structural change

GROWTH:
Accommodation providers and online portals

DECLINE:
Travel agencies and tour packages

Currently the package holiday remains the most important form of holiday organisation and the personal conversation, especially in travel agencies, the most important booking channel. However, the structural change in favour of individual bookings, accommodation providers and online portals has been observed for years. The driving force behind this development is the continuous increase in online bookings, from 14% of all pre-booked holidays in 2006 to 38% in 2016. It can be expected that by 2020 the majority of all holiday bookings will be generated online (i. e. online or via e-mail).



Content Marketing: Preferred content from customers' point of view

For the supply side in tourism it becomes increasingly important to know how to reach the customer in the best possible way. For this reason, we have asked the potential travellers in which ways they prefer to be inspired in their holiday planning process. The requirements are very clear: For the content, the most important aspect is to gain impressions of what the destination looks like and of potential holiday experiences. In terms of the format, customers clearly prefer pictures over texts or videos. Tonality should primarily be informative and serious. Funny or emotional content appeals only to a minority.

Travellers have a clear picture of how they want to be inspired for their holiday planning.

Most prefer an informative and serious communication of impressions and possible experiences at the holiday destination.

More information on this topic in the module „Content Marketing“

Content Marketing: preferred content for inspiration



Question: „We would like to know what leads to you wishing to travel to a certain holiday destination. By what do you like to be inspired when choosing your holiday destination?“
Basis: German-speaking population 14-70 years; RA online 11/2016

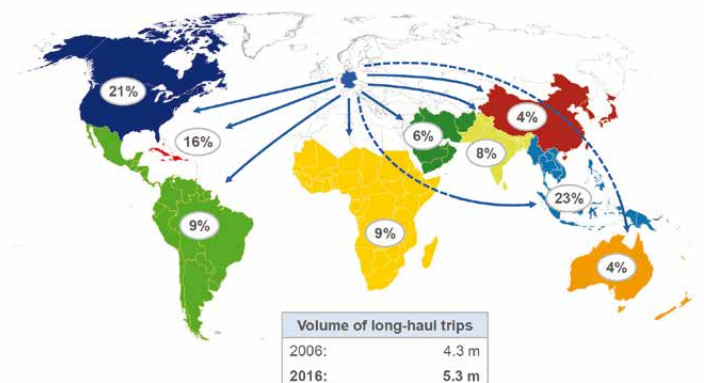
Rising demand for long-haul travel: Highest growth rates in Asia

8% of all holiday trips in the past year went to long-haul destinations outside Europe and the Mediterranean. Compared to 2006 the number of long-haul trips increased from 4.3 to 5.3 million. This growth is distributed unevenly across the globe: Southeast Asia and the Arab Emirates accounted for the highest growth rates in the past decade. Looking at the expressed interest in long haul destinations the trend for Asian destinations is likely to continue in the future.

8% of all holiday trips are long-haul trips.

Most long-haul trips go to Southeast Asia, North America and the Caribbean.

Market share of world regions for all long-haul trips 2016



Volume of long-haul trips	
2006:	4.3 m
2016:	5.3 m

Basis: Holiday trips (5+ days) of the German-speaking population 14+ years to long-haul destinations (i.e. outside Europe and the Mediterranean)
Source: RA 2007, 2017 face-to-face

Destinations in Southeast Asia and the Emirates are currently particularly popular.

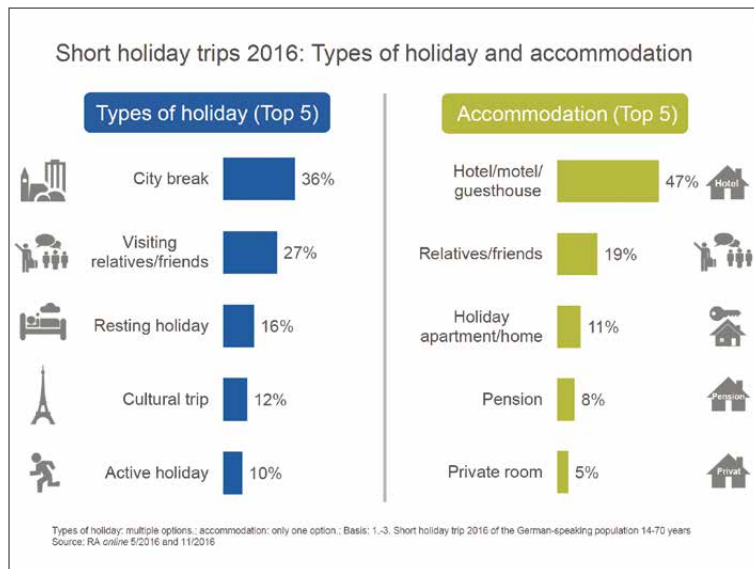
Short holiday trips: The boom of city destinations

The volume of short holiday trips is growing.

75% of short holiday trips are domestic.

Most common are city breaks. The most popular accommodation is the hotel.

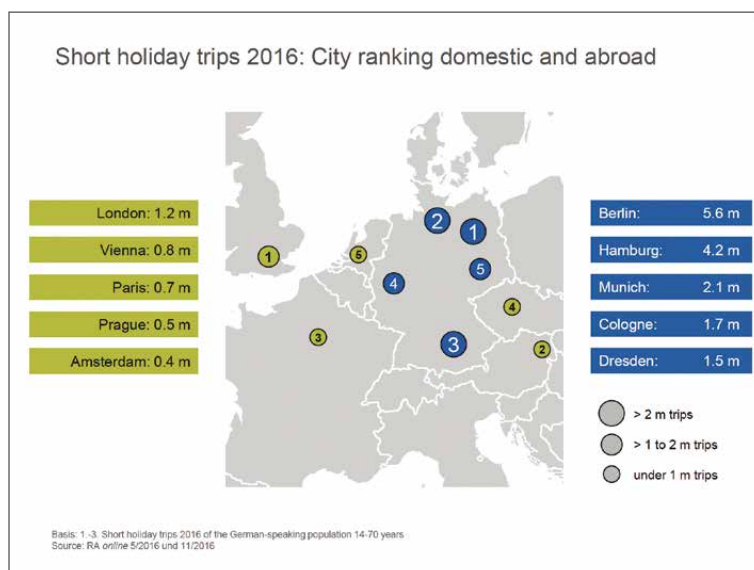
While the demand for long holiday trips (5+ days) has been stagnating for years on a high level, the volume for short holiday trips (2-4 days) is rising. 75% of the 80,5 million short holiday trips in 2016 were domestic trips with Bavaria and North-Rhine Westphalia the most popular destinations. Abroad, Austria and the Netherlands have the lead. The predominant form of travel is the city break, the most common type of accommodation is the hotel.



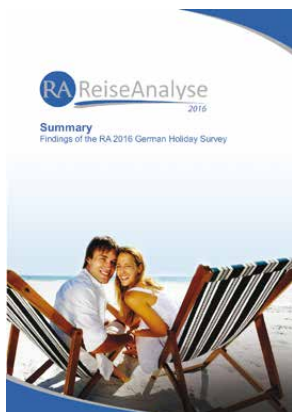
For city breaks the metropolises dominate, both domestically and abroad.

For city destinations, the big metropolises dominate. They are also the destinations that profit the most from the increasing demand. Domestically, Berlin and Hamburg are in front, followed by Munich, Cologne and Dresden. Abroad, London is most popular in front of Vienna, Paris and Prague.

In Germany, Berlin and Hamburg have the clear lead; abroad London holds the top position.



You can find more information in our publications: Summary of the Reiseanalyse 2016 und 2017



With the summary of the Reiseanalyse we provide you the opportunity to acquire a detailed abstract of the essential results of the Reiseanalyse.

In addition to selected results, time series and comparisons with previous years concerning holiday trips of five days and more, you also get analyses about short holiday trips. Selected results from the modules of the Reiseanalyse are also presented, as well as the Sinus-Milieus.

The summary of the RA 2016 is available as a softcover version for € 290 (excl. VAT) in German and English. The publication contains approximately 100 pages. The summary of the RA 2017 will be published in Autumn 2017.

For more information visit www.reiseanalyse.de,
or order directly via e-mail: info@reiseanalyse.de
or via phone: +49 431 888 88 00.

Detailed summary of travel behaviour

Important comparisons of time series

Selected insights into the module results and the Sinus-Milieus

German Holiday Travel 2025



The RA Trend Analysis "German Holiday Travel 2025: development of holiday travel demand in the German source market" by the authors Martin Lohmann, Dirk Schmücker and Ulf Sonntag provides estimates of holiday travel behaviour in 2025. These trends are based on long time series data from the Reiseanalyse since the 1970's and 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 Trend Analysis can be purchased as a softcover version for € 590 (excl. VAT) in German and English. It contains 160 pages/113 figures and tables.

For more information visit www.reiseanalyse.de,
or order directly via e-mail: info@reiseanalyse.de
or via phone: +49 431 888 88 00.

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

With your participation in the RA 2017 you benefit from:

- ▶ Representative figures
- ▶ Long-term time series
- ▶ Individual evaluation possibilities
- ▶ Benchmarking with competitors
- ▶ Best value for money

Participation in the Reiseanalyse 2017

What is the Reiseanalyse?

The Reiseanalyse examines the German holiday travel demand for long and short holiday trips, every year since 1970. More than 12.000 representative interviews are carried out all over Germany. It offers reliable, high quality and up-to-date data for the tourism industry to use in their strategic planning, market analyses and marketing activities. The main focus is on user friendliness and individual reporting of the results.

The possibilities for individual analyses and benchmarking are manifold and straightforward. The Reiseanalyse is a multi-client-study, all costs are shared between more than 25 partners. This ensures a comparatively low entry level price with every customer only paying the services he requires.

What does the Reiseanalyse cost?

Results of the standard question programme* from € 9.400

Modules
€ 5.500

Individual components & evaluations

Raw data & software
from € 3.900

*the basic participation is a precondition for the use of the Reiseanalyse data.

Who uses the Reiseanalyse?

Partners and customers of the Reiseanalyse are national and international tourism organisations, tour operators, transport companies, publishing companies, federations as well as universities and research facilities (a selection can be found at www.reiseanalyse.de).

Who is in charge of the Reiseanalyse?

The RA is carried out by the FUR (Forschungsgemeinschaft Urlaub und Reisen e.V.). FUR is a non-profit, neutral association, dedicated to the realisation and development of the Reiseanalyse. The Reiseanalyse is carried out by a team of three partners: The FUR together with the NIT (Institute for Tourism Research in Northern Europe) are in charge of the organisational and scientific aspects of the survey. Ipsos carries out the field work and is responsible for the data processing.

You want to learn more?

We are very happy to show you the possibilities the Reiseanalyse holds for you. Please contact us for more information and an individual offer:



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RA 2017

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