

Selected first results of the 51st Reiseanalyse



WELCOME TO THE KEY RESULTS OF THE REISEANALYSE 2021

The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to announce key results from the current Reiseanalyse 2021. The Reiseanalyse, which has been conducted annually for more than 50 years, is considered the most detailed study on German holiday travel demand. The FUR is a neutral, non-commercial interest group of tourism research users. The Reiseanalyse is produced annually on its behalf.

2020: Unprecedented decline

The Covid-19-pandemic has brought previously unimaginable declines to the travel industry:

For the year 2020, we record around 20% fewer holiday travellers, 30% fewer holiday trips, 40% less total expenditure on holiday trips and 60% fewer short holiday trips than the year before.

The development varied in different segments: the biggest declines were in travelling abroad (almost -50%), package tours (-50%) and air travel (almost -60%).

There is a glimmer of hope in the domestic market, which was not only able to significantly increase its market share of all holiday trips, but even realised absolute growth in the number of trips. On the other hand, however, there was a significant decline in the number of domestic short-holiday trips.

2021: Reason for optimism

At the beginning of the year, most Germans are quite confident about the travel year 2021. There is a strong desire for holiday travel, but at the same time many people are uncertain whether and when travelling will be possible again.

The holiday trip remains an important commodity for Germans that they do not want to go without. Behind this are holiday-related motives and interests that even the Covid-19-pandemic does not change.

Although a large part of the population is rather pessimistic about the development of the general economic situation, 80% expect their personal economic situation to remain stable or even improve. This is another essential prerequisite for a rapid increase in demand for holidays in 2021, as soon as travel is possible again.

2020: Unprecedented decline

VOLUME OF HOLIDAY TRAVEL IN 2020: Dramatic decline, most distinctly in spending

Holiday
travellers



44.6 m

-19%*

Holidays



50.5 m

-29%*

Expenditure on
holiday travel



45.1 bn

-38%*

Holiday travel in 2020 (5+ days)

Holiday travel propensity was 63% in 2020, significantly lower than previous years (2019: 78%). This corresponds to a volume of 44.6 million people who took at least one holiday trip. The number of holiday trips fell from 70.6 million to 50.5 million.

The decline in total travel expenditure was even more dramatic, from € 73.1 billion to € 45.1 billion.

Short breaks 2020 (2-4 days)

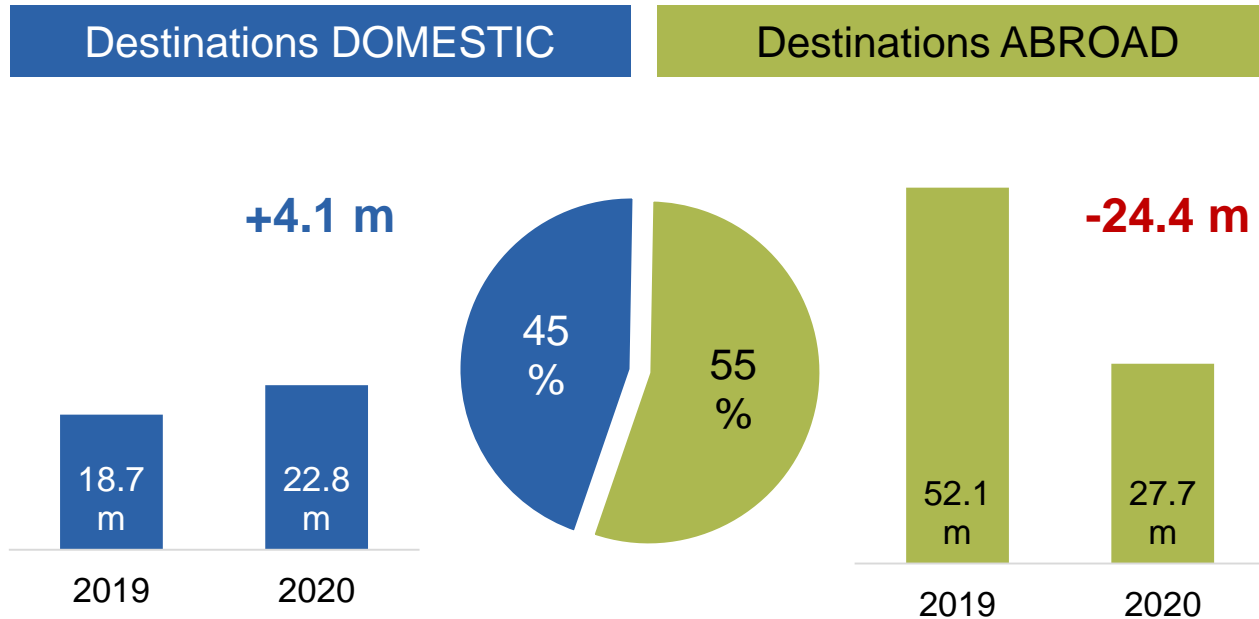
The picture is even bleaker for short-holiday trips: in 2020 there were only 37 million short-break trips (-60%) with a spending volume of € 11 billion (-60%).

* Development from 2019 to 2020

Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2020 lasting 5 days or more

Source: RA 2021 *face-to-face*

DESTINATIONS FOR HOLIDAY TRAVEL IN 2020: Growth for domestic travel, dramatic decline abroad



Market shares domestic vs. abroad

The Covid-19-pandemic is shaking up long-standing destination trends. After decades of rising market share for international destinations, Germany's market share rises from 26% in 2019 to 45% in 2020.

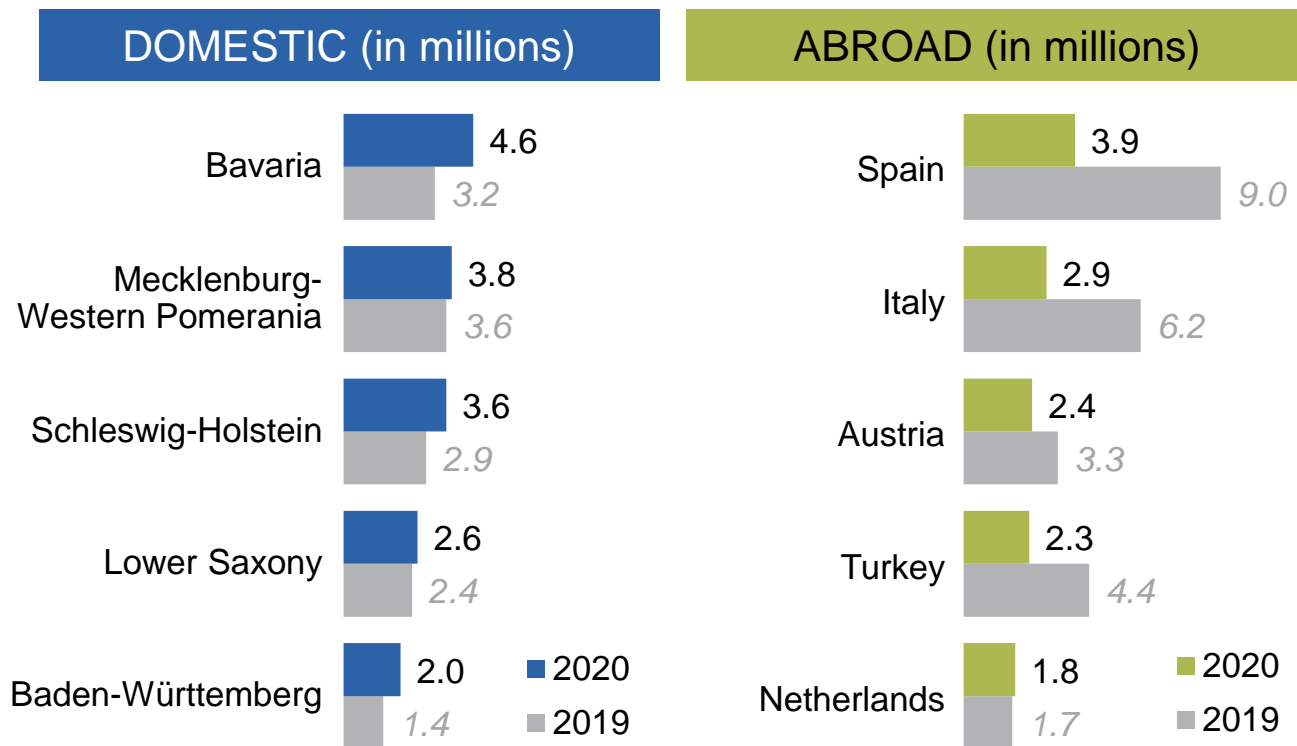
Domestic vs. foreign holiday volume

The significant shifts in the market shares mean that in the end there is even a plus of 4.1 million holiday trips (5+ days) for the domestic market.

However, this positive result is clouded by the fact that in 2020 there were almost 40 million fewer short-break trips (2-4 days) within Germany.

For foreign countries, a decline of 24.4 million holiday trips (5+ days) is recorded for 2020.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2020: Especially air-travel destinations decline significantly



General

In terms of destination rankings, the Corona year 2020 presents a familiar picture with the same top 5 as in 2019.

Domestic destinations

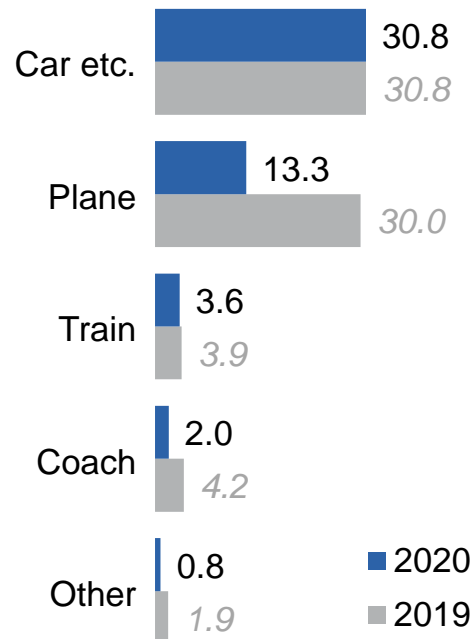
All the German states recorded increases in holiday trips (5+ days), with the most significant increases in Bavaria, Schleswig-Holstein and Baden-Württemberg. As a result, Bavaria returned to the top of the list.

Destinations abroad

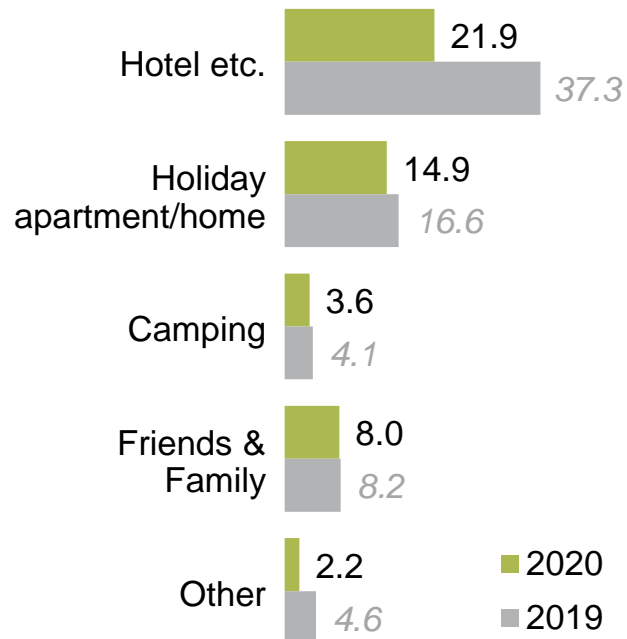
Spain remains in first place, but with a drop of almost 60% compared to the previous year. The decline is similar in Italy, but much less in Austria. The Netherlands even recorded a small increase. Special in the case of Turkey: more than one million holidaymakers have family ties to the country.

HOLIDAY TRAVEL BEHAVIOUR IN 2020: Highest declines for air and hotel travel

Means of transport (in millions)



Accommodation (in millions)



Mode of transport

Consistent with the destinations, we see the biggest declines in travel by air (-56%). Coach travel also declined dramatically. The volume of car travel, on the other hand, remained stable.

Accommodation

The dynamics of accommodation are in line with the results for destinations and means of transport. Here, the hotel loses massively, while more individual forms of accommodation get through the crisis much better.

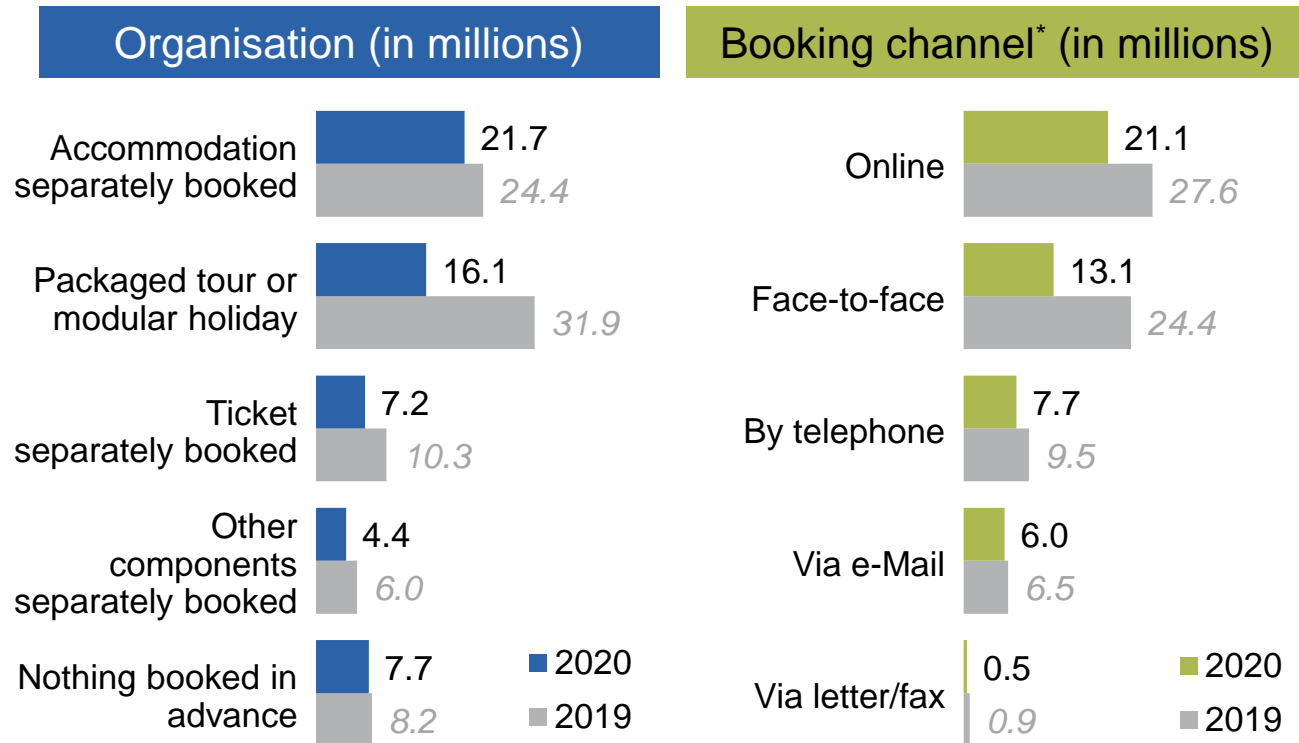
Trip duration and expenditure

Travel duration decreased to an average of 11.7 days (2019: 12.4) due to the change in destination choice.

The same applies to holiday expenditure per person and trip. This averaged € 892 in 2020 (2019: € 1.032).

ORGANISATION & BOOKING FOR HOLIDAY TRAVEL 2020:

Highest declines in package tours & personal booking



Holiday organisation

Consistent with the destinations, we see the biggest declines in package holidays (-49%). The negative dynamics were less dramatic for individual bookings of accommodation and tickets.

Booking channels

Despite changes in destination choice, the proportion of holidays booked online increased to 49% (2019: 44%); at the same time, the proportion of holidays booked face-to-face decreased to 31% (2019: 39%).

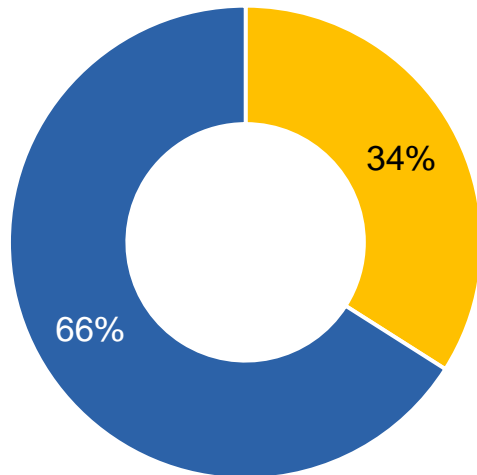
In absolute figures, however, both booking channels are losing. For face-to-face bookings, the loss amounts to 11.3 million trips, for online bookings to 6.5 million trips.

* only holiday trips with advance booking
Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2020 lasting 5 days or more
Source: RA 2021 *face-to-face*

CORONA AND DESTINATION CHOICE IN 2020:

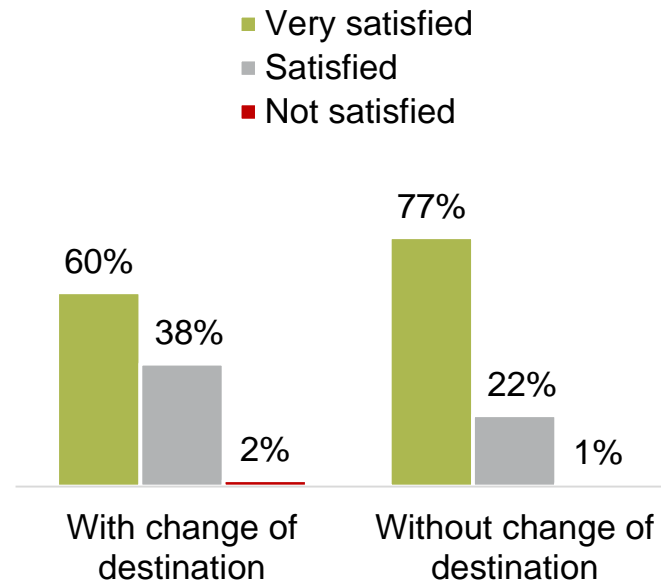
The destination was changed for more than a third of the trips

*Changed destination
April - December 2020 due to
the Covid-19-pandemic?*



- Yes, changed the destination
- No, did not change the destination

*Holiday satisfaction
April - December 2020*



Destination choice and Corona

In the period from April to December 2020, more than a third of the holiday trips (5+ days) went to a destination other than the one originally planned. This shows the flexibility of holidaymakers who prefer to adapt to circumstances rather than cancel a trip altogether.

Satisfaction on holiday trips

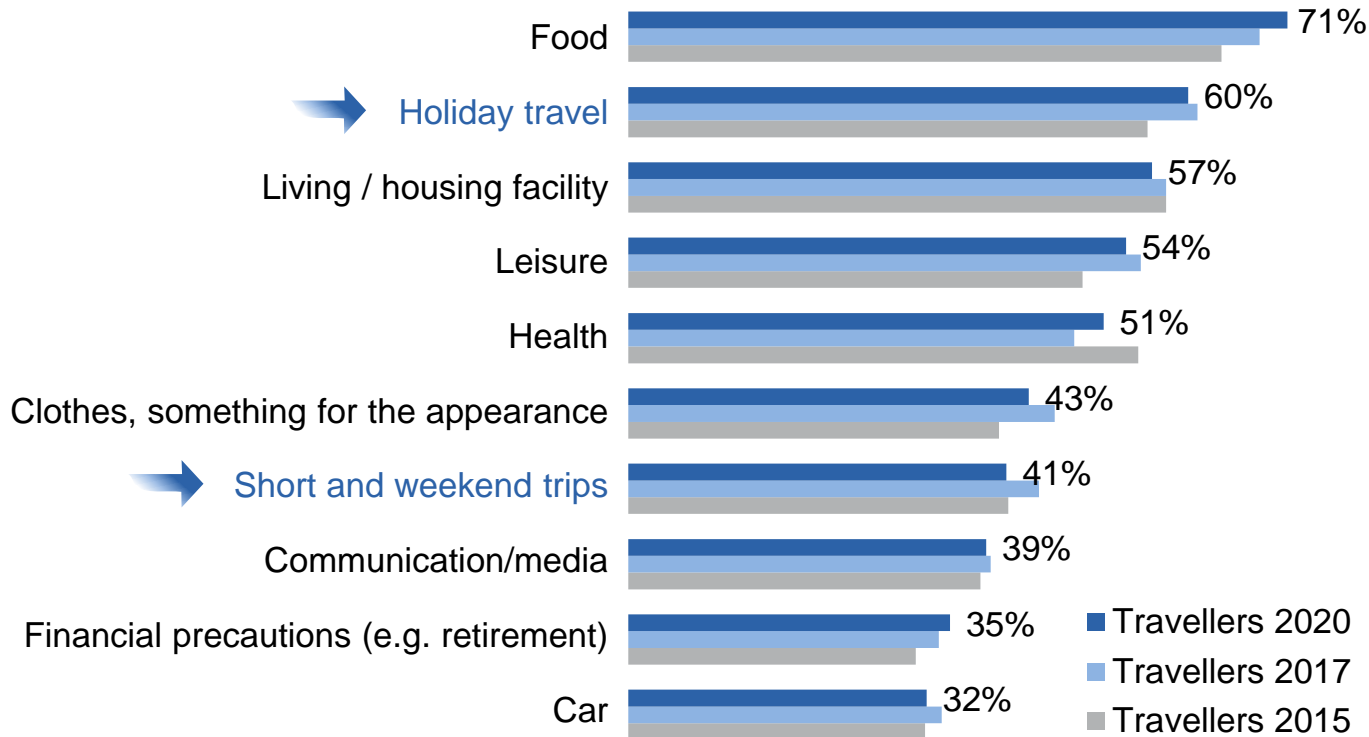
In general, Germans also had a successful holiday at their substitute destination. However, satisfaction is higher among those who were able to travel to their originally planned destination.

Holiday feeling 2020

On their holiday trips from April to December 2020, the majority of 52% of holidaymakers "felt different, but not better or worse" than in other years. 10% felt better, 19% either worse or no different than usual.

Outlook 2021: Reason for optimism

CONSUMPTION PRIORITIES: High priority of holiday travel ensures stability of demand



Consumption priorities

Among holidaymakers, holidays are currently the second most important consumption priority, with an agreement of 60%, the same as in 2017 and even more than in 2015. Short trips and weekend breaks are significantly less important.

Further requirements for holiday travel in 2021:

The holiday trip remains an important commodity for the German consumer. There are holiday-related motives and interests underlying this, which even the Covid-19-pandemic does not shake.

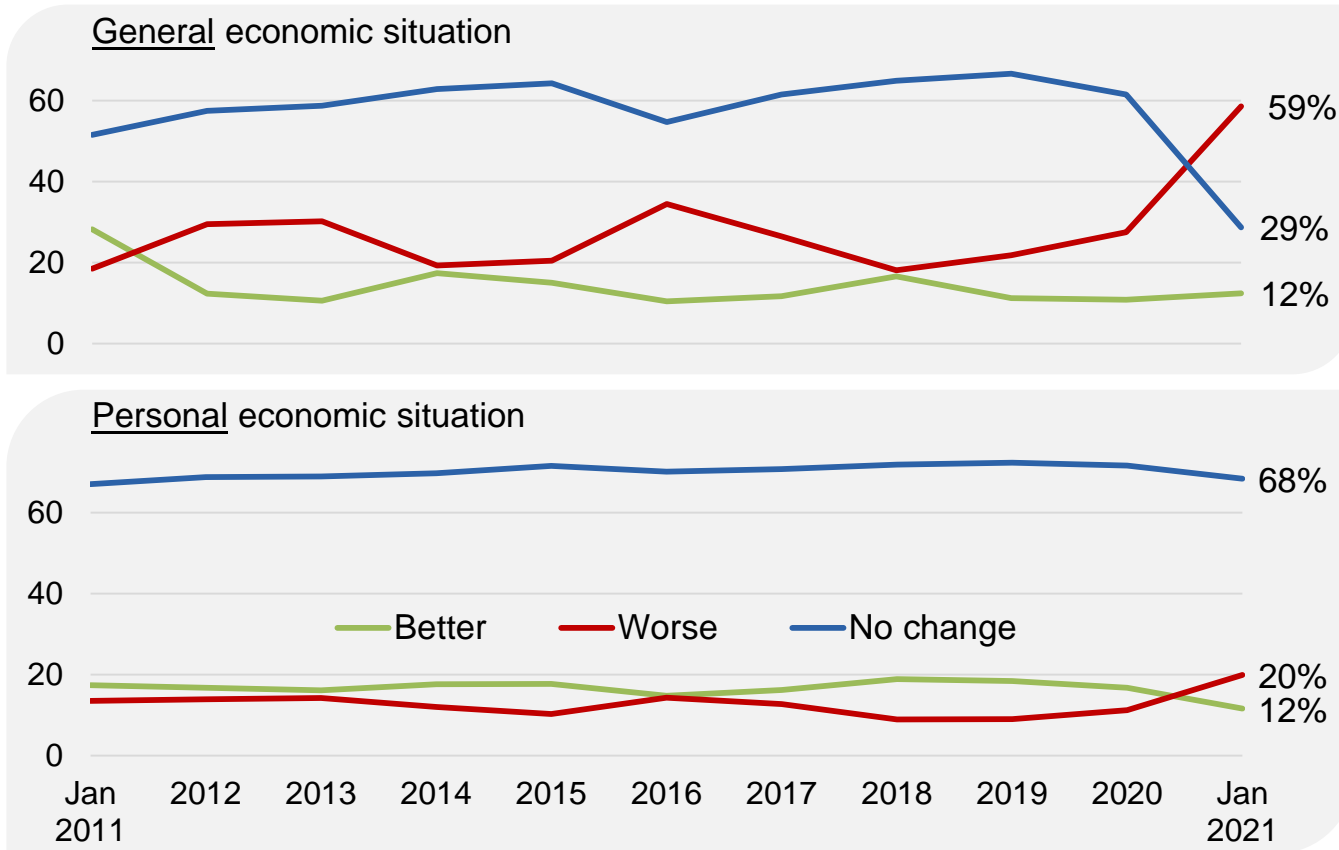
Question: I have a list here of different things to spend your money on. Which of these areas are particularly important to you personally?

Basis: Holiday or short holiday travellers in the last 12 months in the German-speaking population, 14-70 years, in Germany

Source: RA online 11/2015, 11/2017 & 11/2020

ASSESSMENT OF THE ECONOMIC SITUATION

Positive starting conditions for holiday travel in 2021



Assessment of the economic situation

Many Germans expect the general economic situation to deteriorate within a year.

With regard to their own economic situation, however, the majority see stable conditions: 12% (previous year 17%) expect an improvement; 20% (previous year 11%) fear a deterioration. The remaining 68% (previous year 72%) expect no change.

This is an essential prerequisite for high holiday demand in 2021.

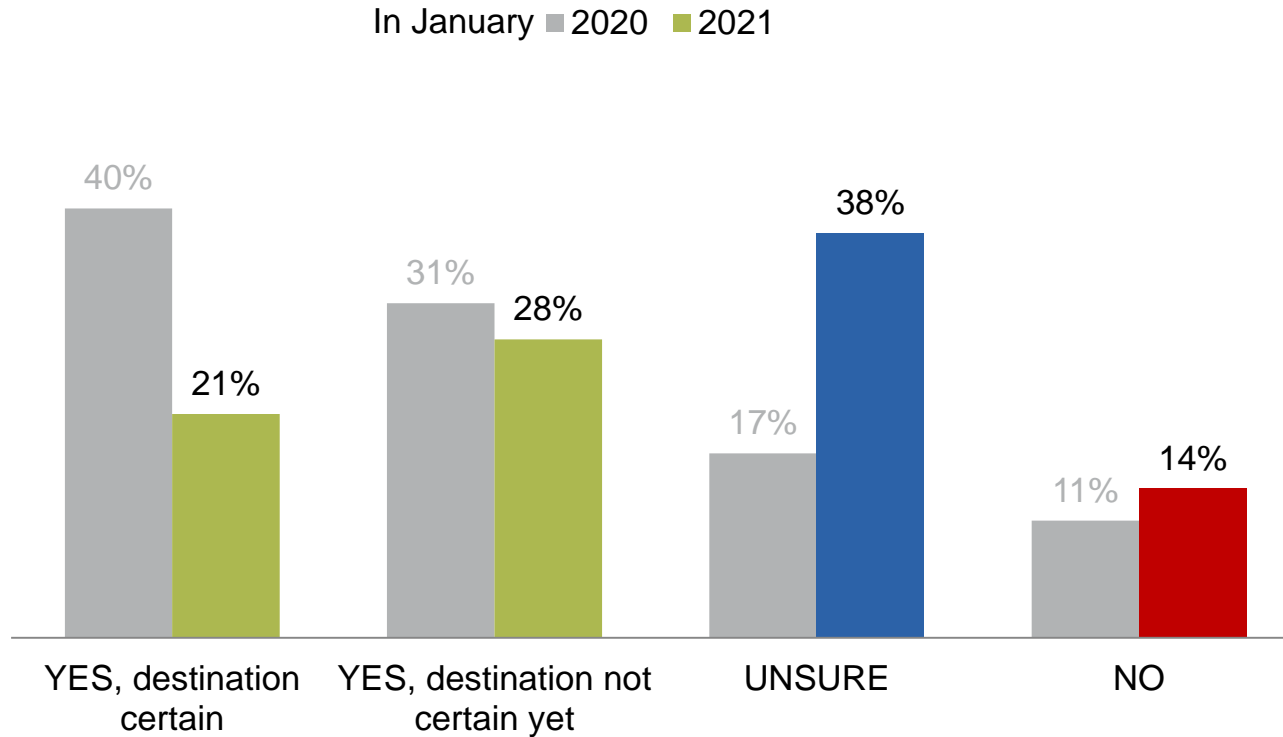
Question: How do you assess the general economic situation in Germany or your personal economic situation?

Will it be better, worse or the same in about a year's time?

Basis: German-speaking population, 14 years and older, in Germany; Source: RA 2021 face-to-face

TRAVEL PLANS 2021:

The results give reason for cautious optimism



Status of holiday plans in January 2021

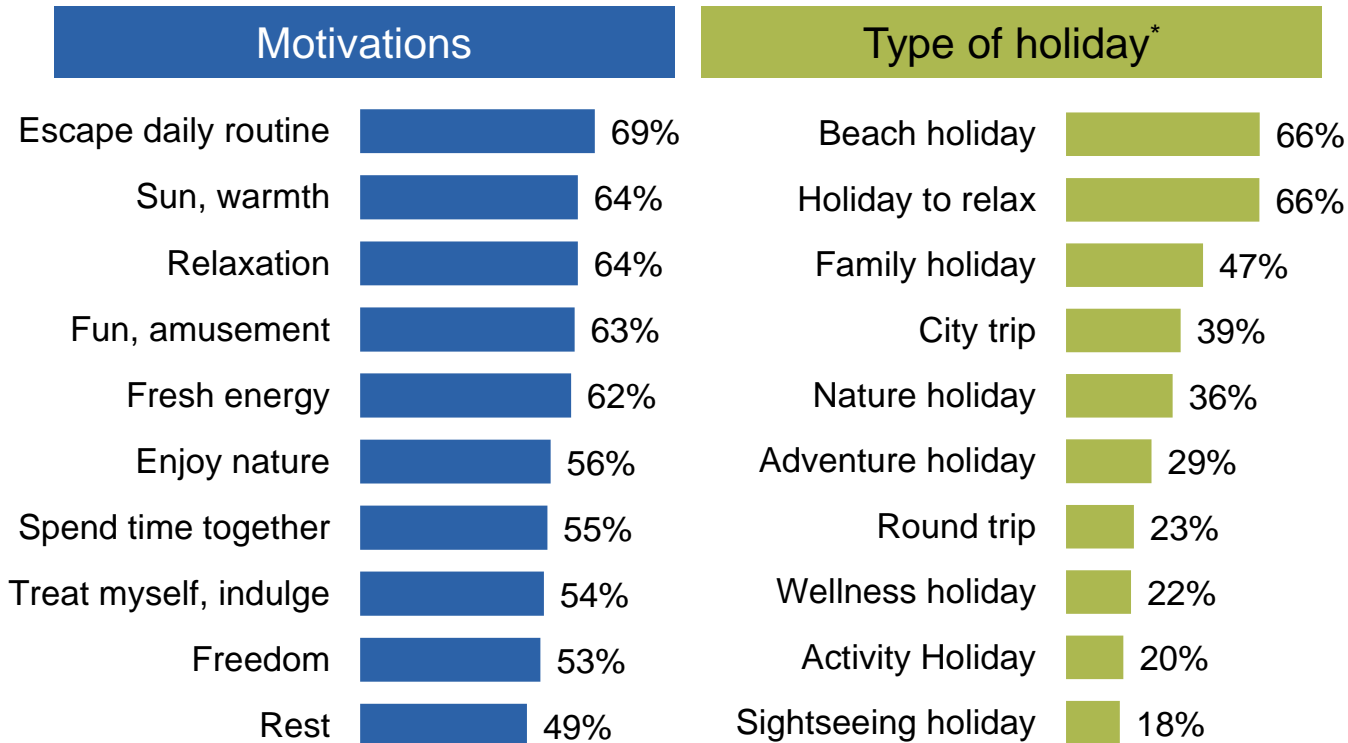
Only 14% of the population are definitely not planning to go on holiday in 2021. This figure is only slightly higher than in the previous year. On the other hand, almost half of the population is planning to travel in 2021: For 21% the destination is already certain, for 28% the destination is still open.

These results give reason to be cautiously optimistic that people will continue to travel on holiday in large numbers in 2021, conditions permitting.

On the other hand, uncertainty is high at the beginning of 2021. At 38% of the population, the level of still uncertain travel planners is more than twice as high as a year ago, while the proportion of those who are already firmly planning with a specific destination is only half as high as at the beginning of 2020.

MOTIVES AND INTERESTS

The longings and desires remain the same



Holiday motivations

The year 2021 brings increases for the vast majority of the 29 holiday motives surveyed. The average number of motives mentioned rises from 10.4 to 11.7.

The ranking of motives has not changed in comparison to previous years: People long to escape everyday life, they want sun, relaxation, fun, fresh energy, nature and to spend time together.

Interest in types of holiday

The results show an increasing interest in most types of holidays. These match the motives expressed: Bathing, relaxing, family holidays, city breaks and nature holidays. Here, too, Corona explicitly does not mix up the ranking.

Question: [Motivations] Which of these things are particularly important to you personally when you go on holiday? [Types of holiday] Which of these ways of going on holiday, do you plan to use within the next 3 years? And which of these types of holidays are generally a possibility for you in the next 3 years?

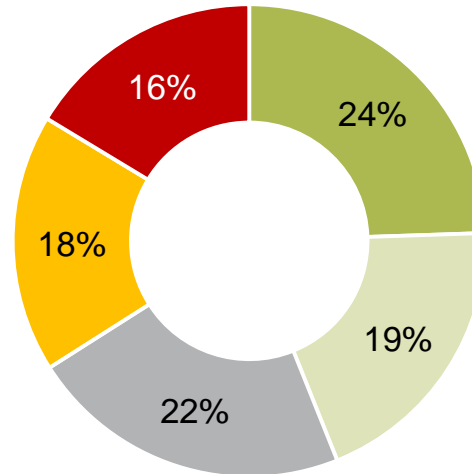
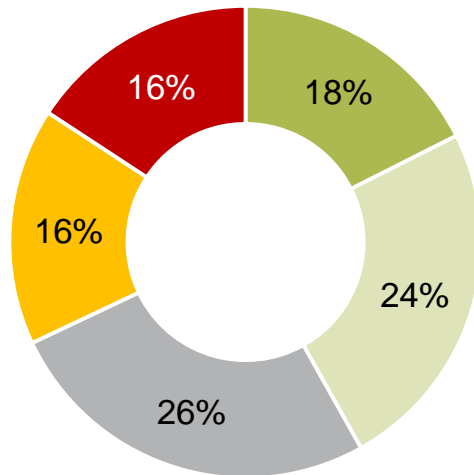
Basis: German-speaking population, aged 14 and over, in Germany; * Sum of the statements for "are planning quite definitely" and "generally consider".

Source: RA 2021 face-to-face

CORONA ATTITUDE: Many are in the starting blocks, others are still rather cautious

"I feel a great urge for freedom and I'm looking forward to finally getting out on holiday in 2021."

"In view of the Covid-19-pandemic and the measures taken against it, I have no desire to bother with travel plans."



■ 1 - fully agree ■ 2 ■ 3 ■ 4 ■ 5 - fully disagree

Attitudes towards holidays in 2021

The attitudes expressed about travel plans in 2021 show once again: On the one hand, there is a large part of travellers for which it cannot start again soon enough.

On the other hand, there are many who are waiting to see how the year and the opportunities for travelling will develop and have no desire to make travel plans at the moment.

Desire for freedom

42% of the population feel a particularly strong urge for freedom and anticipation of holiday travel in 2021 due to the Covid-19-pandemic.

No desire to plan travel

44% of the population in January 2021 do not (yet) feel like making any travel plans for the current year.

Information about the Reiseanalyse

DO YOU WANT TO KNOW MORE? BECOME A REISEANALYSE PARTNER!

The Reiseanalyse has been studying the travel behaviour of the German population for over 50 years. Several population-representative surveys (face-to-face and online) are conducted annually with a total of more than 10,000 respondents.

The Reiseanalyse is a participation survey, the costs of which are shared by the partners of the RA. A basic participation is a prerequisite for using the results of our investigations. Depending on the area of application, the basic scope of participation can be supplemented and individualised with further modules and extensions.

Partners of the Reiseanalyse include national and international DMOs, tour operators, transport companies, but also public institutions, associations and universities.

All details on the Reiseanalyse and your participation options at www.reiseanalyse.de

Participation scheme of Reiseanalyse

As a partner of the RA you will receive information on:

Holiday travel experience
of the last 3 years
for 80 destinations,
25 holiday types & 15 activities

Travel behaviour
last year
All about holidays
and short breaks

Travel intentions and
Holiday interests
80 destinations,
25 types of holiday

Detailed socio-demographics, holiday motives, internet use

Optional extensions:

Main topics

Own questions in
the surveys

Exclusive/additional
questions

Analysis software

Sinus®-Milieus

Consulting and analysis
services

Fields of application:

Target group segmentation

Advertising planning

Volume estimates &
Profitability analyses

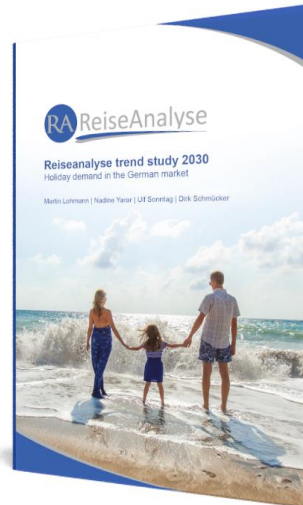
Analyses of potential

Motive research

Benchmarking &
Brand tracking

Reiseanalyse Trend Study 2030 Holiday demand in the source market Germany

The Reiseanalyse Trend Study describes the long-term development of the demand side of holiday tourism in Germany, from the early 1970s to the year 2030. Comprehensive time series of the RA formed the basis for the search for regular correlations in the past and their projection into the future. Significant influencing factors from the environment and the tourism offer were taken into account in order to make statements about the probable direction and strength of travel trends in the coming years. Short- and medium-term deviations due to the Corona pandemic in 2020 were also included in the estimates.



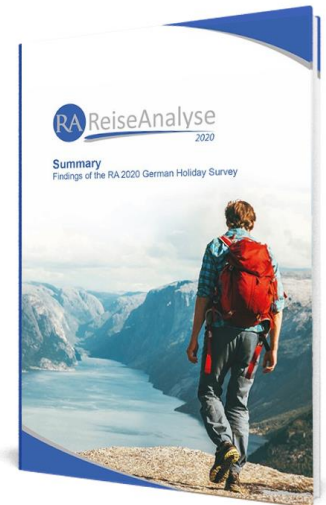
ISBN 978-3-9819158-4-6
134 pages, 80 illustrations
reiseanalyse.de/trend-study-2030/

RA 2020: Summary of the results Structure and development of holiday travel demand

The annual *summary of the Reiseanalyse* focuses on a detailed summary of the key findings of our most recent research. The latest edition deals with the findings on travel behaviour in the 2019 travel year.

In addition to selected results, time series and comparisons with the previous year, the summary also contains selected results of the thematic focal points on *inspiration and information, sustainable travel and health and holidays*.

An short version of the RA 2021 will be published in autumn 2021.



ISBN 978-3-9819158-6-0
112 pages, 90 illustrations
reiseanalyse.de/summary/

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Further information and ordering at www.reiseanalyse.de/publications/