

Selected first results of the 53rd Reiseanalyse



WELCOME TO THE KEY RESULTS OF THE REISEANALYSE 2023



The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to announce key results from the current Reiseanalyse 2023. 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.

2022: Almost back to pre-pandemic levels

In 2022, 67 million holiday trips (5+ days) took place, 22% more than in the previous year and only 5% less than in 2019. Total expenditure on these trips rose to a new record high of almost € 79 billion.

Regarding the destinations, the shares are almost as usual: 27% of trips were domestic, 73% abroad. Abroad, Spain dominates ahead of Italy, Turkey, Austria and Croatia. This was accompanied by a noticeable growth in air travel, hotel accommodation and package tours - all well above the level of 2021, but not quite at the same level as 2019. Booking channels follow the long-term trend towards digital: For the first time, more than 50% of trips were booked online in 2022.

After the two pandemic years, the key data for 2022 show holiday behaviour very similar to before the pandemic.

2023: Good prospects despite crises

The first look at the demand-side conditions for 2023 is comparatively bleak: The assessment of the economic situation is more negative than ever before and the confidence of having enough money for holiday travel in 2023 is significantly lower than in previous years.

On the other hand, the high value of holiday travel as a consumer good is confirmed, and the more specific people are asked about their travel plans for 2023, the better the outlook becomes: 69% of the population certainly plan a holiday trip in 2023, 17% are uncertain and only 13% are not planning a trip. These values are at the same level as before the pandemic.

A high demand for holiday travel in 2023 is quite possible and not unlikely - at the same time, the market risks are clearly visible but difficult to quantify in terms of their impact.

Review 2022:

Almost back to pre-pandemic levels

VOLUME OF HOLIDAY TRAVEL IN 2022:

Travellers & travel still below 2019, spending at record high

Holiday
travellers



52.9 m

2021: 47.8 m
2020: 44.6 m
2019: 55.2 m

Holiday
trips



67.1 m

2021: 55.1 m
2020: 50.5 m
2019: 70.8 m

Expenditure on
holiday travel



78.6 bn

2021: 56.0 bn
2020: 45.1 bn
2019: 73.1 bn

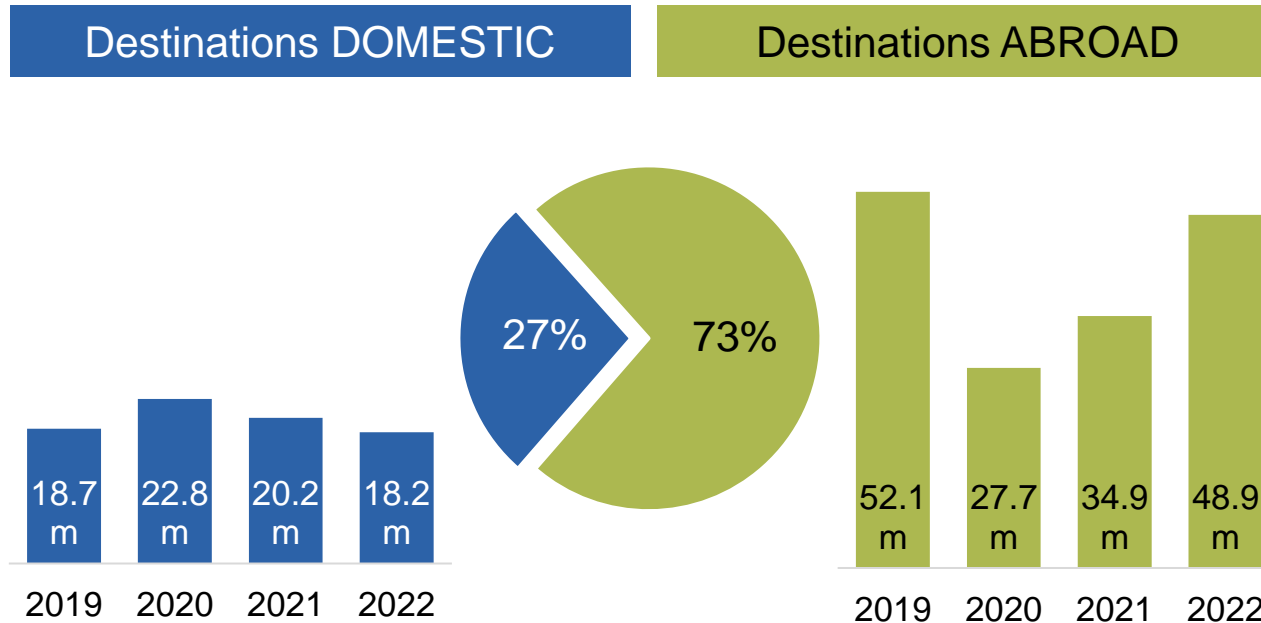
Holiday travel in 2022 (5+ days)

Holiday travel propensity (the proportion of people who have gone on at least one holiday trip in 2022) was 75%. This corresponds to a volume of 52.9 million people. This value has increased compared to the year before (68%) and is now slightly below the 2019 level (78%). The same applies to the value of 67.1 million holiday trips in 2022. In terms of travel expenditure, 2022 was a record year: At € 78.6 billion, the overall expenditure was more than € 5 billion higher than in 2019.

Short breaks 2022 (2-4 days)

Key data for the segment of short breaks (of 14 to 75 year-olds) in 2022 show 77 million short breaks and a total expenditure of € 27 billion. Thus, there were slightly fewer short breaks than in 2019, but a new record for travel expenditure.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2022: Domestic and international travel slightly below 2019 levels



Market shares domestic vs. abroad

After the strong market share losses of destinations abroad in 2020 and 2021, 2022 shows conditions as before the pandemic: 73% of all holiday trips went abroad in 2022 (2019: 74%).

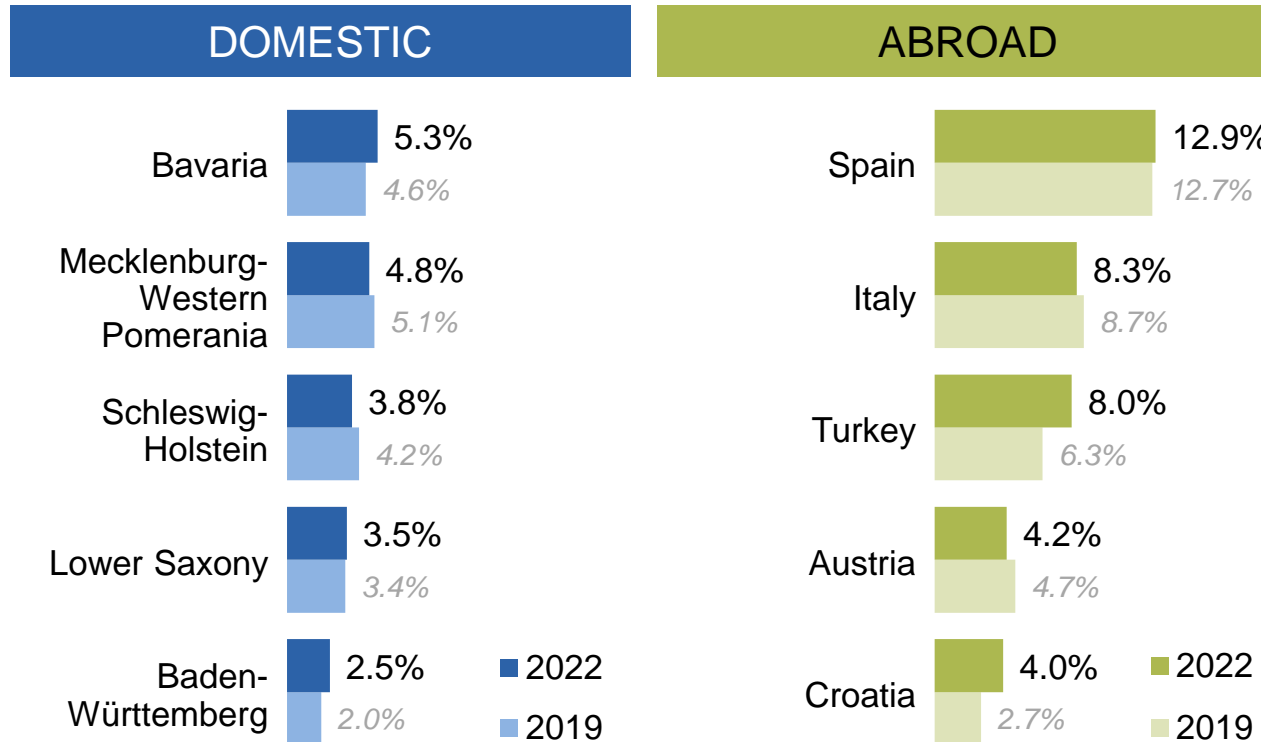
Domestic vs. foreign holiday volume

For destinations abroad, this means an increase of 14 million holiday trips compared to the previous year. The volume of trips abroad is only slightly below the level of 2019.

Germany is by far the No. 1 destination with a share of 27%. Compared to 2021, there is a decline of 2 million trips. This means that the current value is just below that of 2019.

Of the short breaks (2-4 days duration), almost 80% went to Germany in 2022, similar to 2019.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2022: Turkey and Croatia gain shares compared to 2019



General

The individual travel destinations also hold shares similar to those before the pandemic.

Domestic destinations

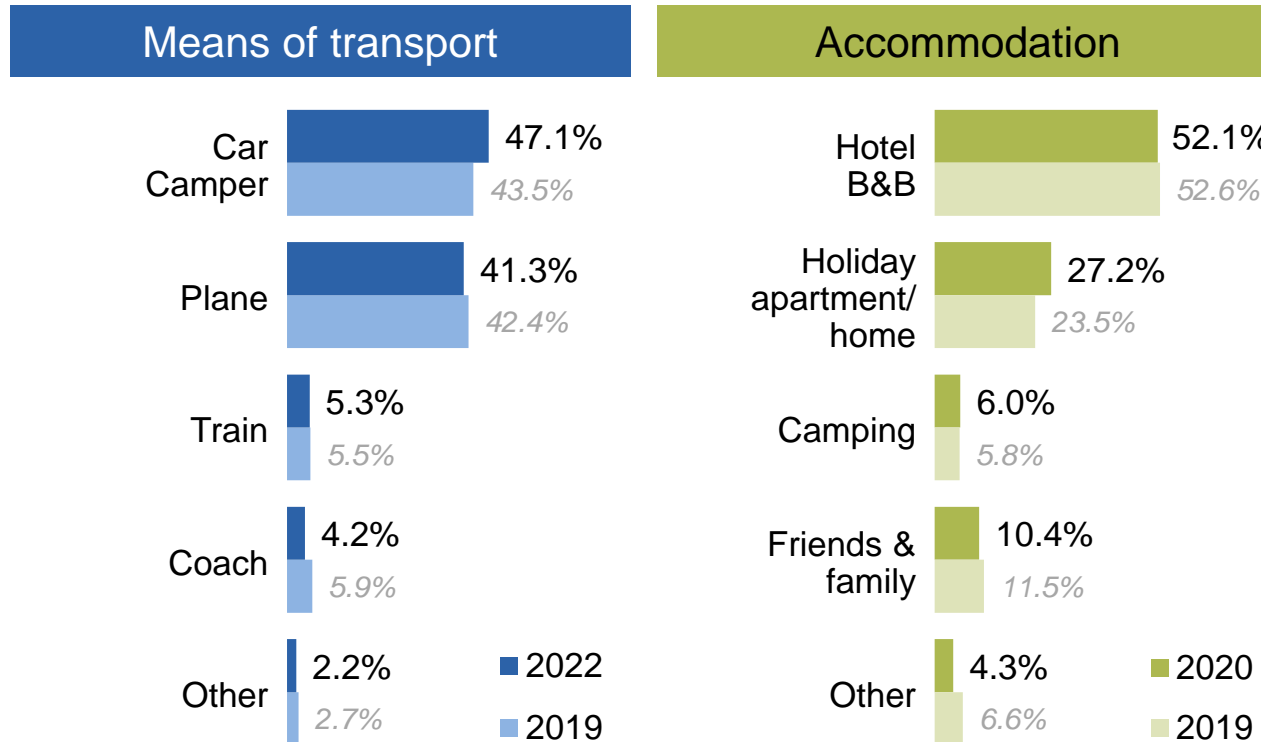
The ranking of the German federal states with the highest demand is familiar: Bavaria ahead of Mecklenburg-Western Pomerania, Schleswig-Holstein, Lower Saxony and Baden-Württemberg. The market shares are similar to those before the pandemic.

Destinations abroad

The ranking of destinations abroad is also the same as in 2019: Spain ahead of Italy, Turkey, Austria and Croatia. Turkey and Croatia were able to increase their market shares, while Spain, Italy and Austria achieved similar values as before the pandemic.

HOLIDAY TRAVEL BEHAVIOUR IN 2022:

More car and holiday home trips compared to 2019



Mode of transport

The significant recovery in air travel (+9 million more holiday trips than in 2021) fits in with the dynamics in destinations. However, this will not quite reach the level of 2019.

Accommodation

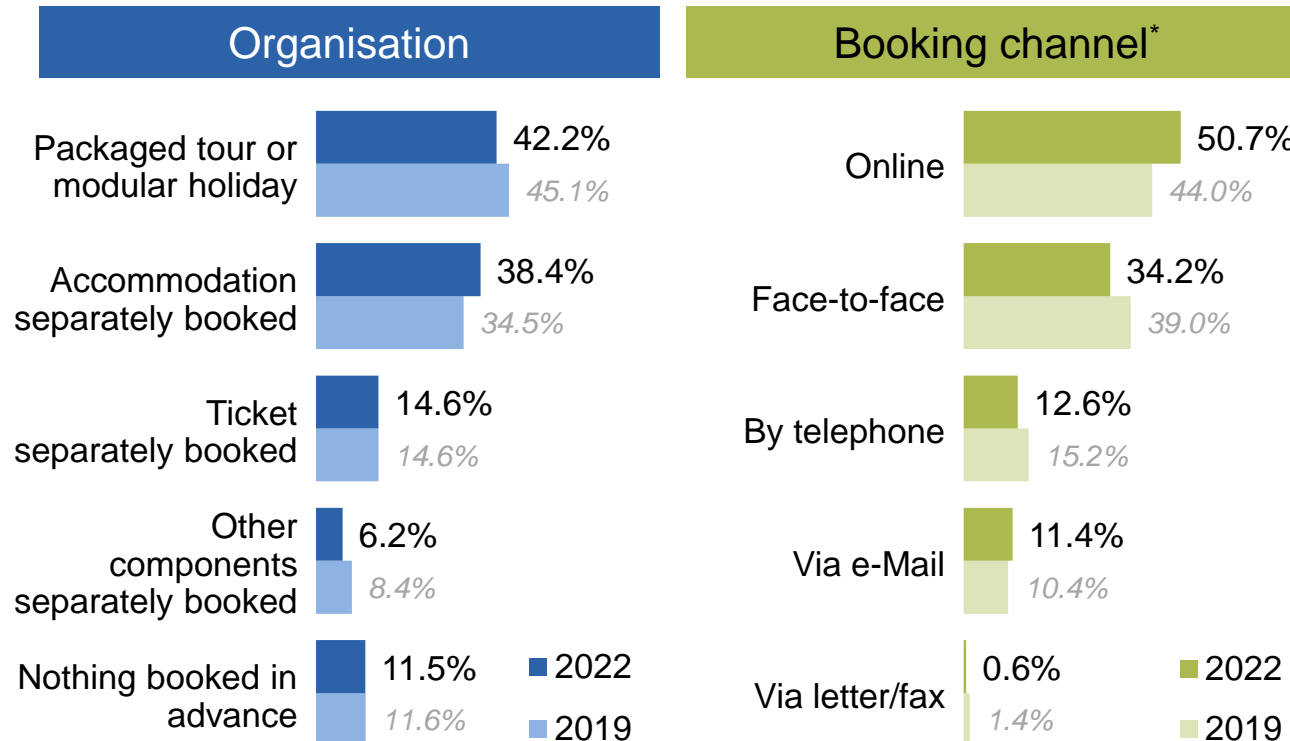
The development in accommodation corresponds to the general market development. Particularly hotels are catching up and are now at the same level as in 2019, while shares of holiday apartments/homes are even higher.

Trip duration and expenditure

The duration of trips in 2022 was 12.7 days on average. This is significantly longer than in the Corona-years and slightly longer than in 2019 (12.4 days).

More was spent per person and trip in 2022 than ever before, namely an average of €1,171 (2021: €1,017; 2020: €892; 2019: €1,032).

ORGANISATION & BOOKING FOR HOLIDAY TRAVEL 2022: Package holidays in the lead again, online bookings dominate



Holiday organisation

In connection with the more frequent choice of destinations in the Mediterranean region, the number of package tours has increased significantly in 2022 compared to the previous year. Compared to 2019, there are slightly fewer package tours and slightly more direct accommodation bookings.

Booking channels

For the first time, more than 50% of all holiday trips are booked online in 2022. A good third of all holiday trips are booked face-to-face.

For both booking channels, the current values confirm the long-term trends: Online bookings are continuously gaining market shares, while face-to-face booking is losing shares.

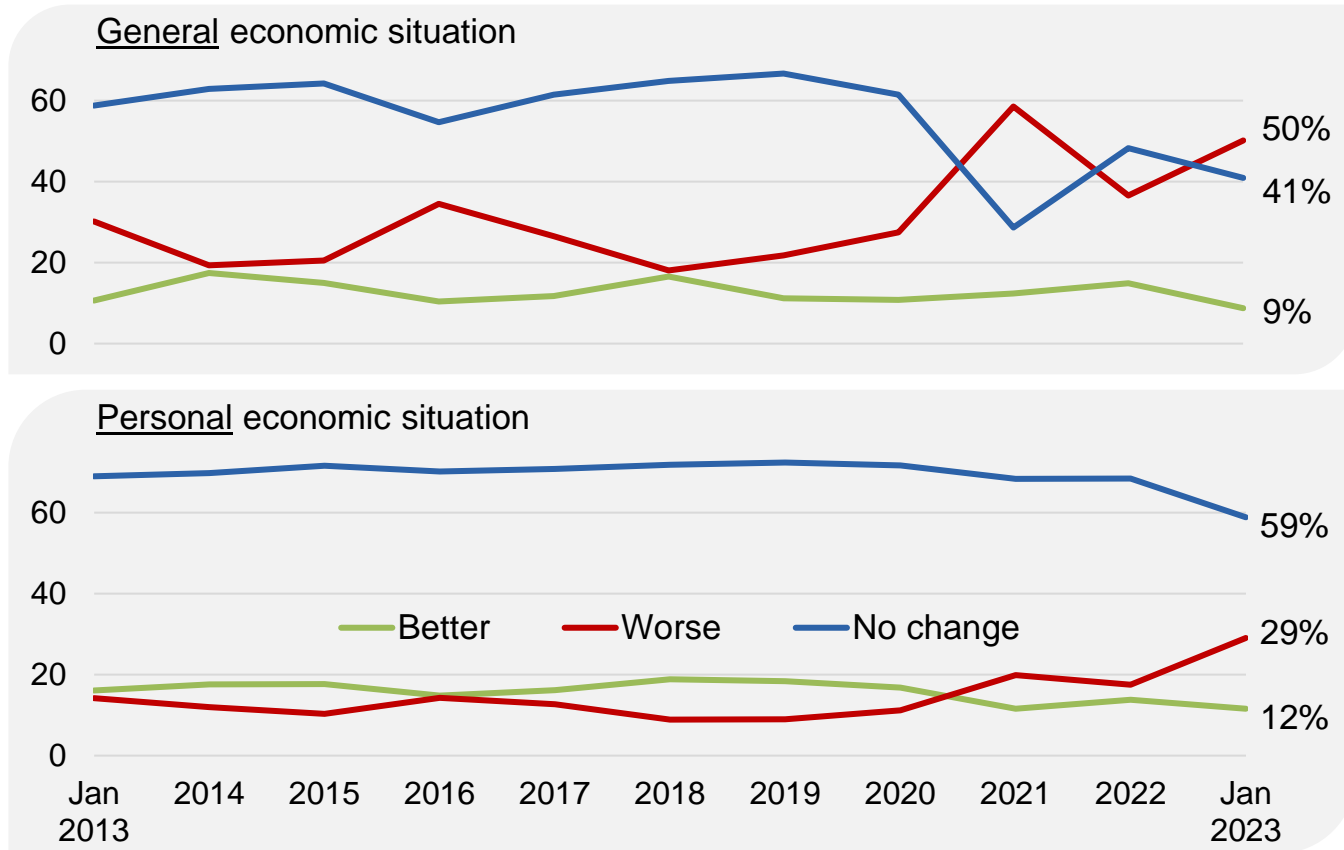
* only holiday trips with advance booking
Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2022 lasting 5 days or more
Source: RA 2023

Outlook 2023:

A good tourism year despite crises?

ASSESSMENT OF THE ECONOMIC SITUATION

Comparatively bleak prospects for 2023



Assessment of the economic situation

With regard to the general economic development, expectations have darkened considerably compared to January 2022. 50% of the population expect a deterioration in the coming 12 months.

Even more important for holiday demand is the view of the personal economic situation: The vast majority, namely 59% (previous year 69%), expect no change. 12% (previous year 14%) expect an improvement, 29% (previous year 18%) suspect a deterioration.

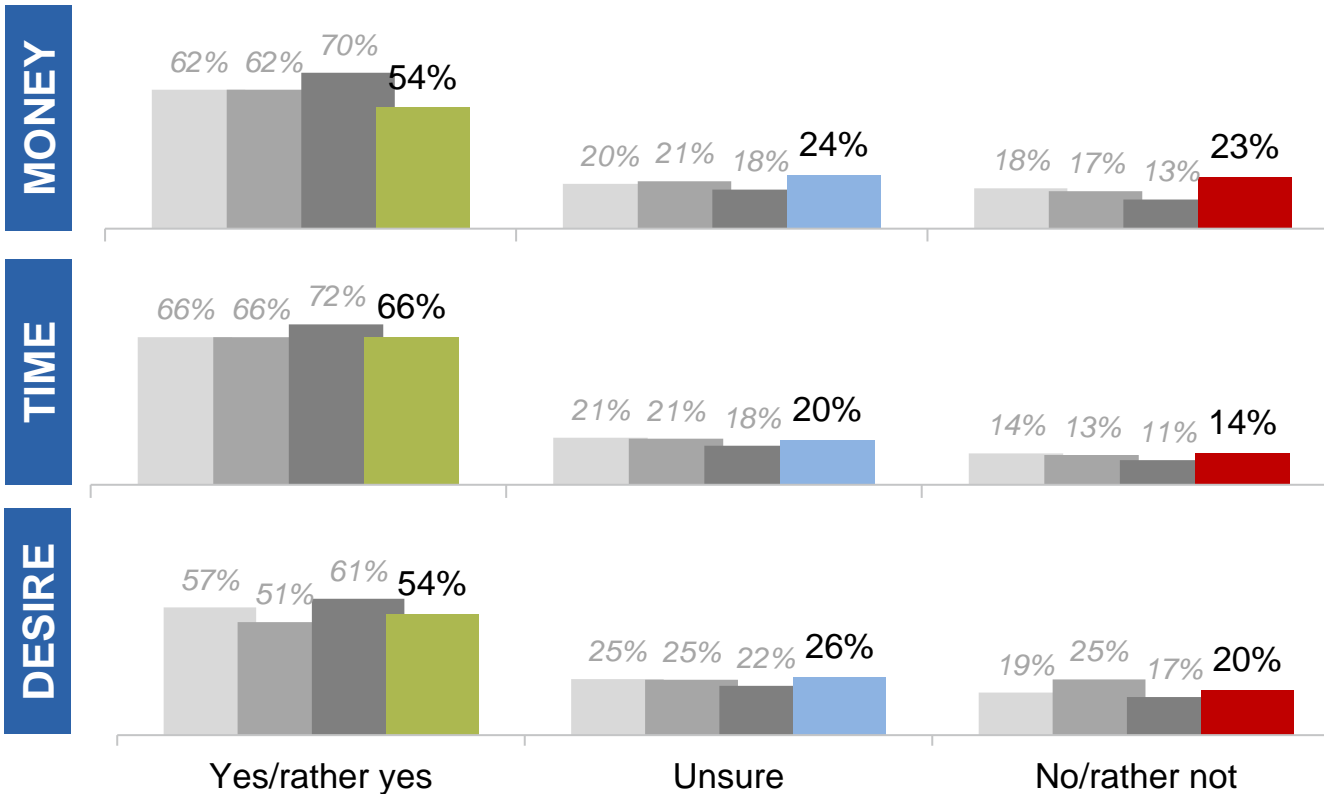
Although this is the most negative outlook on the personal economic situation in the past decade, 71% of the population have a stable or even positive outlook.

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 2023

MONEY, TIME, DESIRE TO TRAVEL 2023: Declines compared to the previous year, but still a good starting point



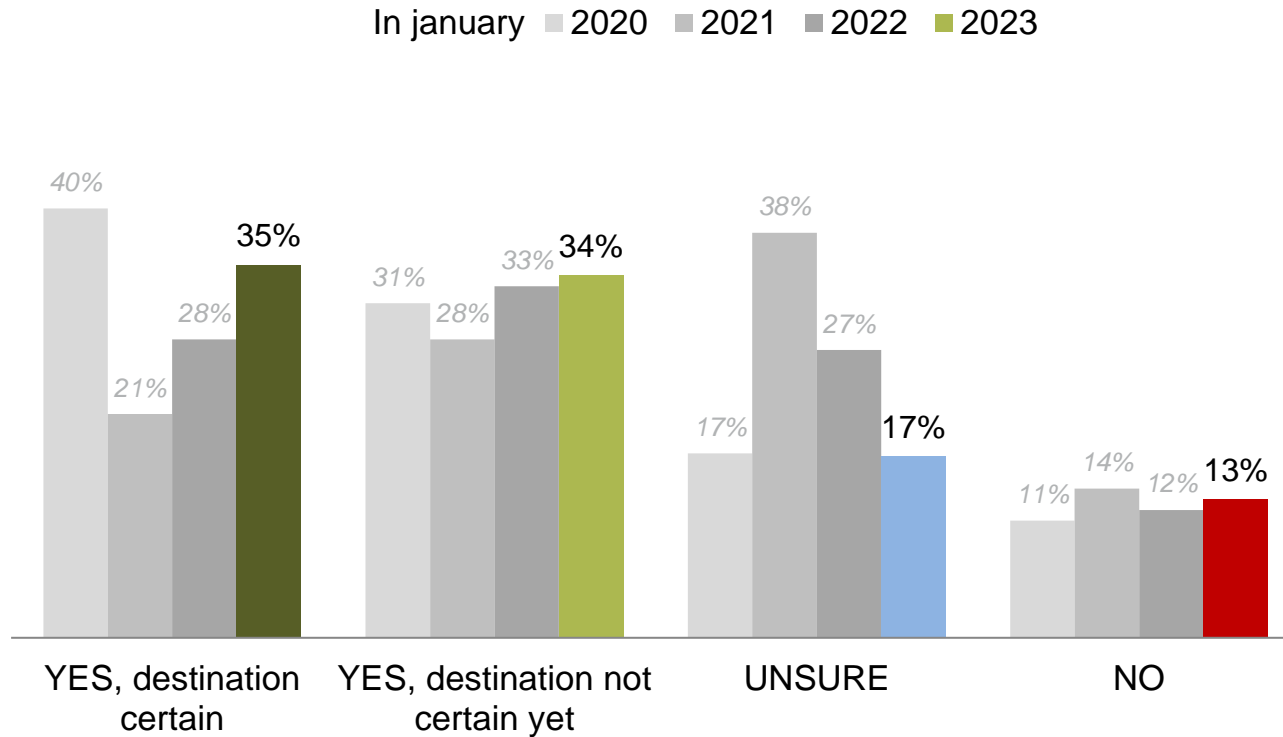
Starting conditions for 2023

Whether someone actually takes a trip is a question of ability (time and money?) and willingness (desire to go on holiday?). After the record values for 2022, the outlook for 2023 is a little more restrained: 66% say they will have enough time for holidays, 54% state that they have enough money and the desire to go on holiday. Especially when it comes to money, the confidence in one's own possibilities has noticeably decreased compared to the previous year.

- Nov. 2019 (for 2020)
- Nov. 2020 (for 2021)
- Nov. 2021 (for 2022)
- Nov. 2022 (for 2023)

TRAVEL PLANS 2023:

Most people already have definite plans for holidays



Status of holiday plans in January 2023

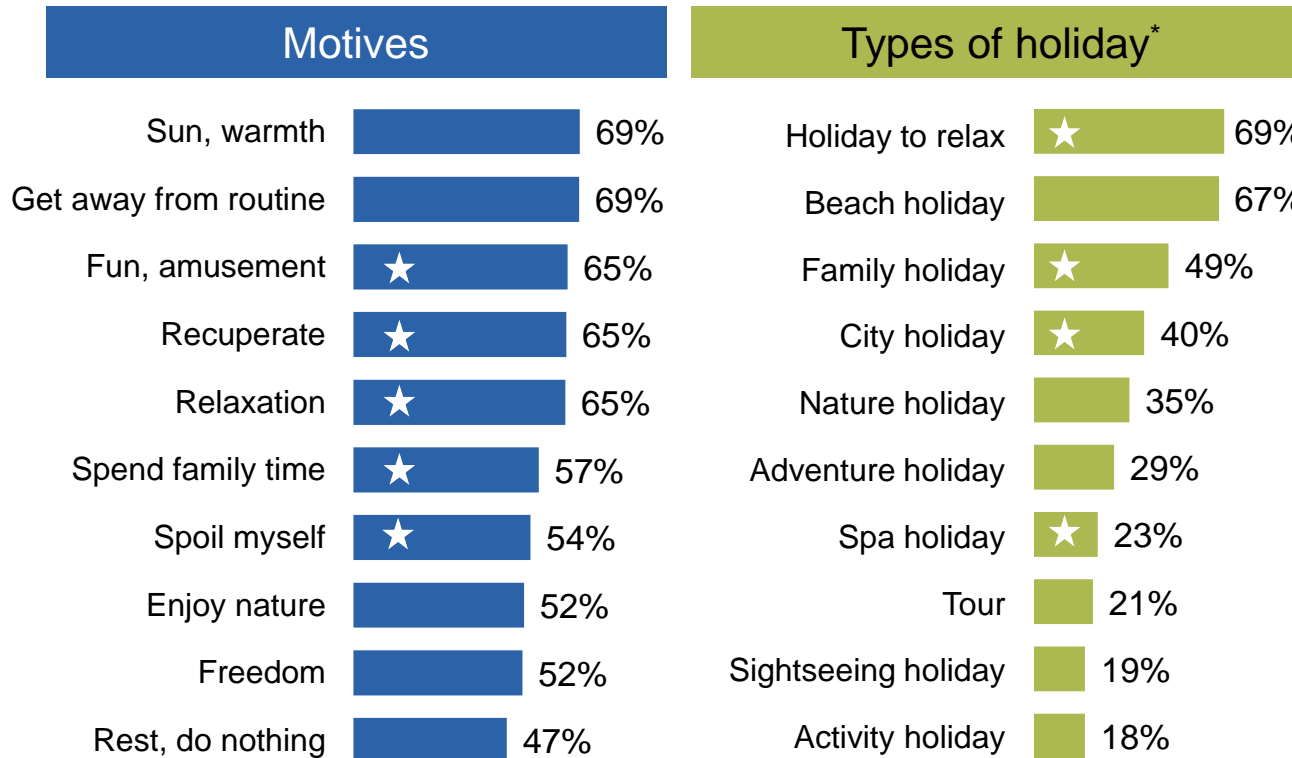
Despite the comparatively negative outlook on the economic situation and travel requirements (time, money, desire), Germans' holiday plans are very positive:

69% of the population are certain to travel in 2023: For 35% the destination is already fixed, for 34% the destination is not certain yet. These are good conditions for a successful tourism year in 2023.

At 17%, the proportion of the unsure is at the same level as before the pandemic, and the number of those who are not planning a holiday trip in 2023 is only slightly higher (13%) than at the beginning of 2020.

MOTIVES AND INTERESTS

Longings and desires have a stabilising effect on demand



Holiday motives

The general holiday motives show that there are many good reasons for the German population to go on holiday. People long for sun, to get away from daily routine, for fun, relaxation, recuperation, time together and spoiling themselves. The average number of motives mentioned rises from 10.4 at the beginning of 2020 to 11.1 in January 2023.

Interest in types of holidays

The results also show an increasing interest in many types of holidays. These match the motives expressed: relaxation, swimming, family holidays, city holidays and nature holidays. The overall picture of motives and holiday forms is thus very stable despite all crises.

Question: [Motives] Which of these aspects are very important for you personally when you are on holiday. [Type of holiday] Which of these holiday opportunities do you plan to use with a high degree of certainty within the next 3 years? And which of these types of holiday do you generally consider in the next 3 years?

Basis: German-speaking population, aged 14 and over, in Germany; * Sum of the statements for "plan almost definitely" and "generally consider"; marked with an asterisk if more than 5 percentage points above RA 2020

Source: RA 2023

CONCLUSION:

Trends in volume and destinations of holiday trips



71 million

51 million

55 million

67 million

65-75 million

26%
domestic share

45%
domestic share

37%
domestic share

27%
domestic share

+/- 26%
domestic

17%
neighbour countries

18%
neighbour countries

15%
neighbour countries

17%
neighbour countries

*neighbour countries
steady*

38%
Mediterranean

26%
Mediterranean

35%
Mediterranean

40%
Mediterranean

+/- 38%
Mediterranean

8% long-haul
destinations

4% long-haul
destinations

4% long-haul
destinations

6% long-haul
destinations

+/- 6%
*long-haul
destinations*

Information about the Reiseanalyse

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

The Reiseanalyse (RA) 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 13,000 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

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 incl. Updates

Holiday demand in the source market Germany

In October 2020, the fifth edition of the Reiseanalyse Trend Study was published. The Trend Study describes the long-term development of the demand side of holiday tourism in Germany, from the early 1970s to the year 2030.

In the meantime, two updates have been published that include the effects of the pandemic and the current crises on travel behaviour.

The basis for the updates were more extensive findings from several surveys within the framework of the Reiseanalyse as well as findings from scientific publications.



ISBN Trend Study 2030: 978-3-949752-04-9

148 pages (plus 44 pages update 2021 and 24 pages update 2022)
reiseanalyse.de/trendstudie-2030/

RA 2022: Summary of the results

Structure and development of demand for holiday travel

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 travel year 2021.

In addition to selected results, time series and comparisons with the previous year, the summary also contains evaluations of short holiday trips by the German-speaking population.

A short version of the RA 2023 will be published in autumn 2023.



ISBN: 978-3-949752-02-5

102 pages, 104 illustrations
reiseanalyse.de/kurzfassung/

These Reiseanalyse publications are available in German as well as in English translation.
Further information and ordering at www.reiseanalyse.de/publications/