

Selected first results of the 52nd Reiseanalyse

Bright
prospects
for the
travel year
2022?

WELCOME TO THE KEY RESULTS OF THE REISEANALYSE 2022



*The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to announce key results from the current Reiseanalyse 2022.
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.*

2021: First signs of recovery

In 2021, 55 million holiday trips (5+ days) took place, an increase of 9% from the previous year. Total travel expenditure during these trips even increased by 24% and amounted to € 56 billion. Nevertheless, these figures are still considerably lower than in 2019.

Especially destinations that recorded the biggest losses in 2020 were able to achieve gains in 2021: Spain, Italy, Turkey, Portugal, Croatia, Greece. This development involves a noticeable increase of air travel, hotel stays and package holidays – all clearly above the level of 2020 but still below 2019.

In many regards, 2020 was an exceptional year for tourism demand: key data for 2021 shows travel behaviour that increasingly resembles the behaviour before the pandemic.

2022: A great travel year?

From a demand point of view, the prospects for the current travel year are positive. The desire for holiday travel is at an all-time high, the personal economic situation is seen as stable. For most Germans, holiday trips are essential components of the quality of life. They provide a refreshing balance to the challenges of everyday life. More and more people underline the importance of social and ecological sustainability for their holidays.

Considerably more people have holiday plans for 2022 than was the case at the beginning of 2021, even though some are hesitant with regard to specific decisions.

Nevertheless, general conditions for tourism are challenging in 2022. A complete return to pre-Covid holiday behaviour patterns is only to be expected in 2023 or even later.

2021: First signs of recovery

VOLUME OF HOLIDAY TRAVEL IN 2021:

More than 2020, but still considerably less than 2019

Holiday
travellers



47.8 m

2020: 44.6 m
2019: 55.2 m

Holiday
trips



55.1 m

2020: 50.5 m
2019: 70.8 m

Expenditure on
holiday travel



56.0 bn

2020: 45.1 bn
2019: 73.1 bn

Holiday travel in 2021 (5+ days)

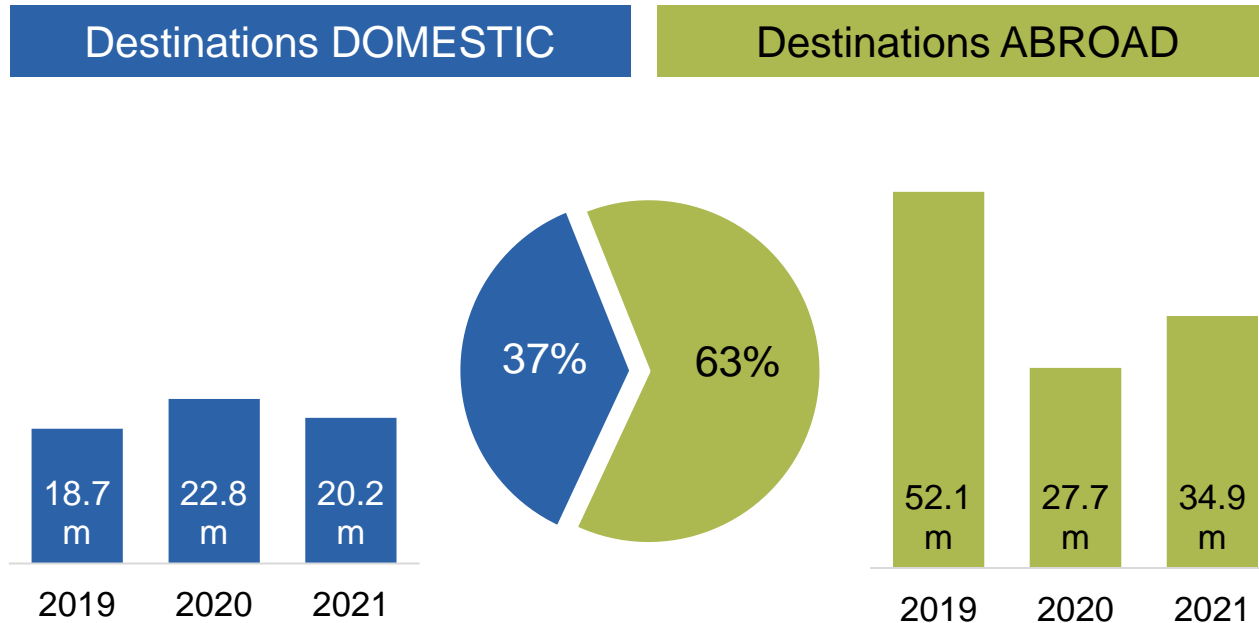
Holiday travel propensity (the proportion of people who have gone on at least one holiday trip in 2021) was 68%. This corresponds to a volume of 47.8 million people. This figure has increased compared to the year before (63%), but remains below the pre-pandemic level (2019: 78%). The number of holiday trips has increased by nearly 5 million to 55.1 million. Total travel expenditure has increased by € 11 billion to € 56 billion.

Short breaks 2021 (2-4 days)

Key data for the segment of short breaks (by 14 to 75 year-olds) in 2021 show 51 million short breaks and a total expenditure of € 15.4 billion. These figures are slightly above the previous year but still considerably lower than 2019.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2021:

More trips abroad compared to the previous year



Market shares domestic vs. abroad

After the severe losses of market share in 2020, destinations abroad were able to partially recover in 2021. 63% of all holiday trips in 2021 went abroad (2020: 55%, 2019: 74%).

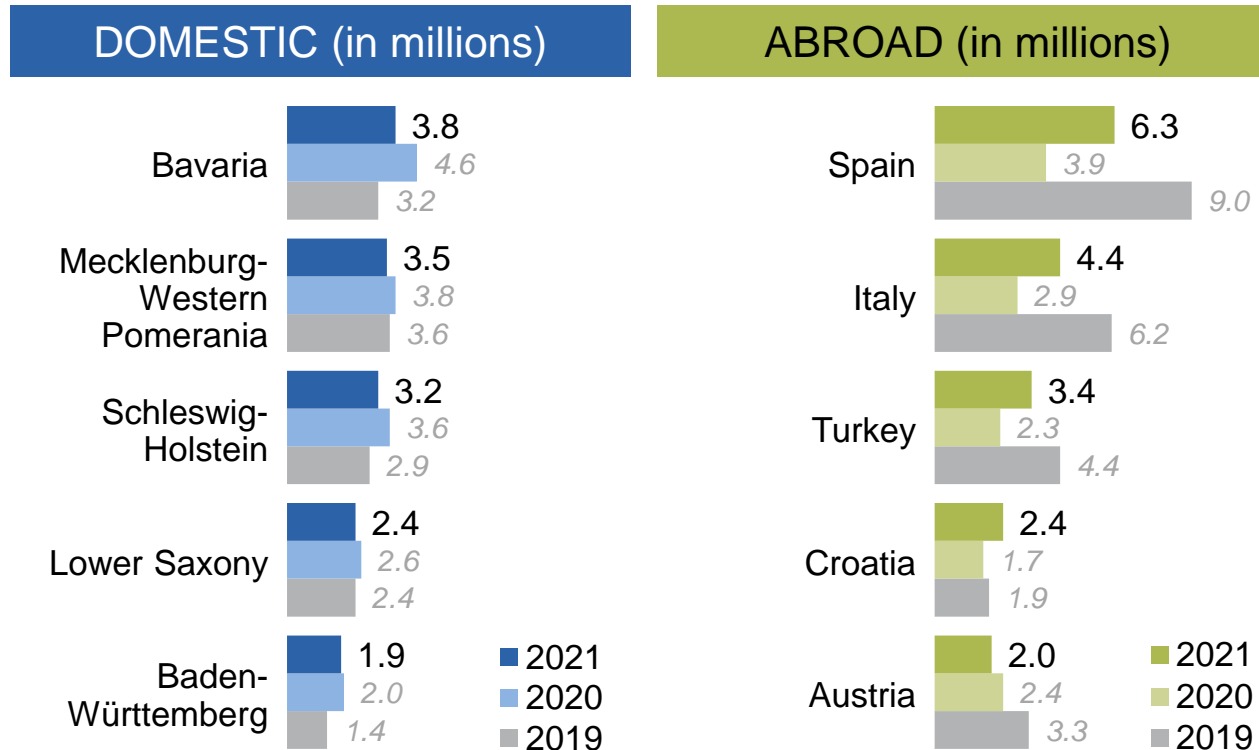
Domestic vs. foreign holiday volume

For destinations abroad this entails an increase of almost 7 million holiday trips compared to 2020. Nevertheless, these 35 million foreign holiday trips still lie considerably below the level of 2019.

With a market share of 37%, Germany is by far the top destination. Since 2020, the number of holiday trips dropped by more than 2 million, but the current level is considerably higher than 2019.

More than 80% of short breaks (2-4 days) took place within Germany.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2021 : Comeback of Spain, Italy and Turkey



General

Destinations that reported the heaviest losses in 2020 have recovered the most.

Domestic destinations

Consistent with the overall development in the domestic market, the numbers of holiday trips to the German states are a bit lower than in 2020 but higher than in 2019. The top 3, Bavaria, Mecklenburg-Western Pomerania and Schleswig-Holstein move closer together again.

Destinations Abroad

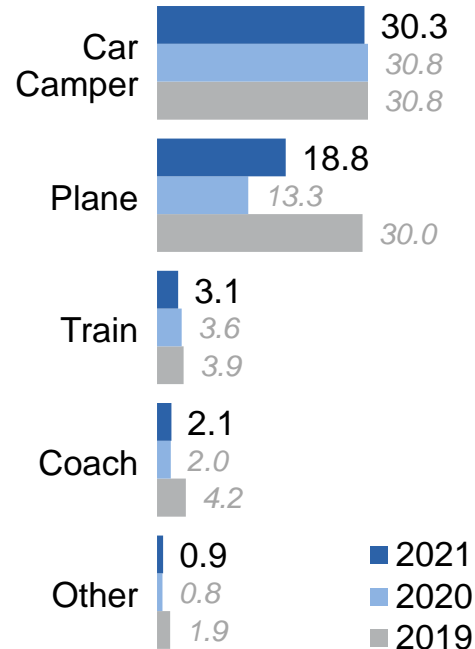
In 2021, more holiday trips than in the previous year went to Spain, Italy and Turkey. Croatia appears in the top 5 and records a larger volume than before the pandemic.

Due to the complete loss of the winter season in 2021, Austria reports even higher losses than 2020.

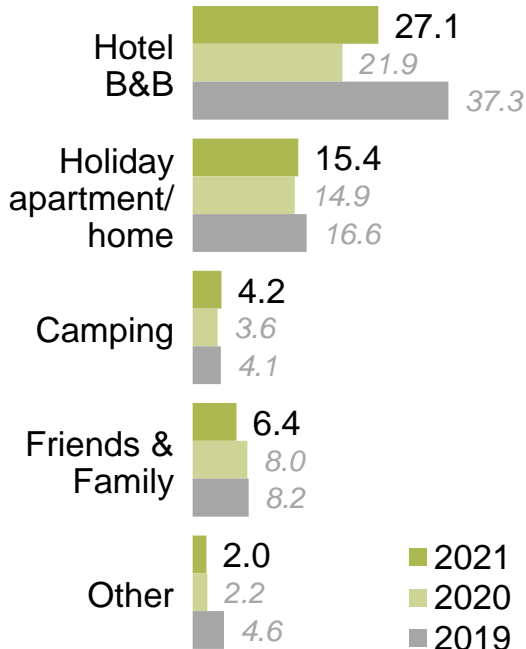
HOLIDAY TRAVEL BEHAVIOUR IN 2021:

Increase of air travel and hotel stays

Means of transport (in millions)



Accommodation (in millions)



Mode of transport

Consistent with the destination development, air travel was able to recover to some extent (+5.5 million holiday trips). The volume of car travel remained stable.

Accommodation

The dynamics of accommodation are in line with the results for destinations and means of transport. The number of hotel stays are considerably higher than in the year before, but overall, more individual forms of accommodation get through the crisis better.

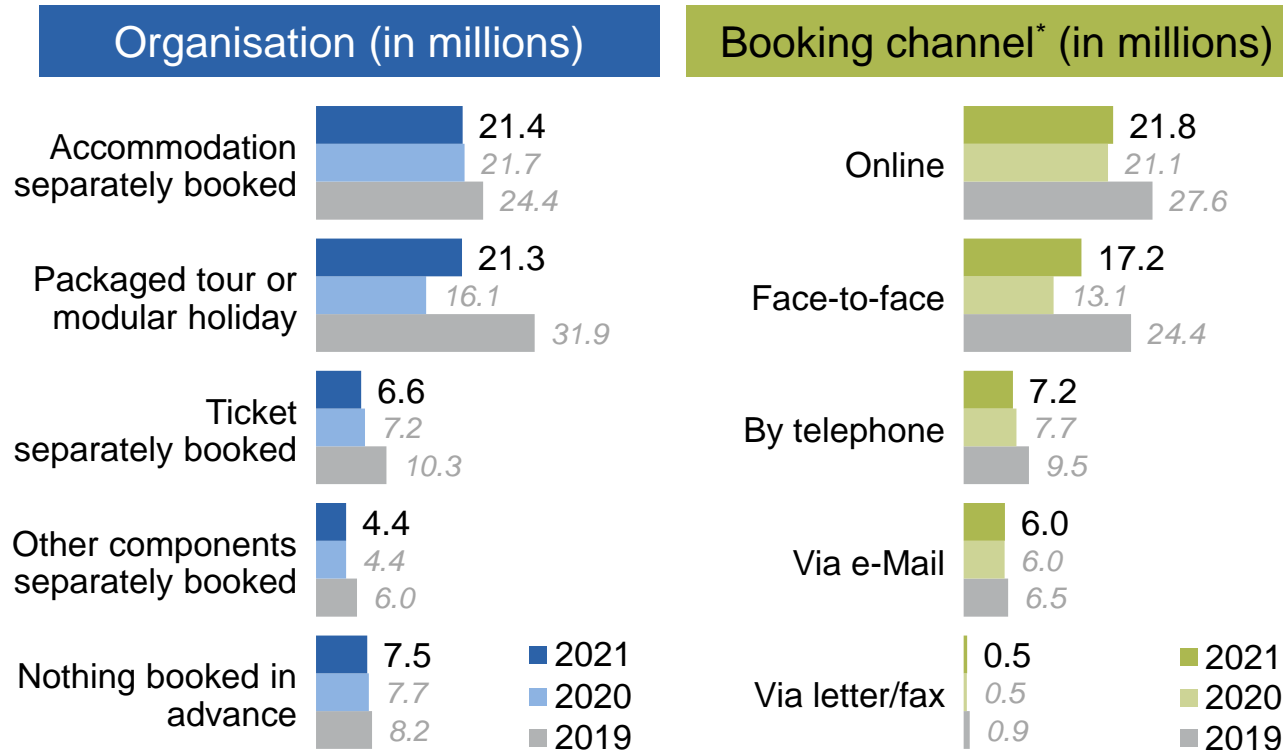
Trip duration and expenditure

The average trip in 2021 had a duration of 12.2 days. After the decline of 2020 (11.7 days), this is almost the level of 2019 (12.4 days).

The average expenditure per person per trip was noticeably higher in 2021 compared to the year before: € 1.017 (2020: € 892; 2019: € 1.032).

ORGANISATION & BOOKING FOR HOLIDAY TRAVEL 2021:

Package holidays on the road to recovery



Holiday organisation

Related to the higher number of holiday trips to the Mediterranean region, the number of package holidays has increased considerably in 2021. The volume of the other forms of organisation remains at the level of 2020.

Booking channels

The most important booking channel is online booking with a volume of nearly 22 million holiday trips.

Holidays booked face-to-face amount to a volume of 17.2 million holiday trips.

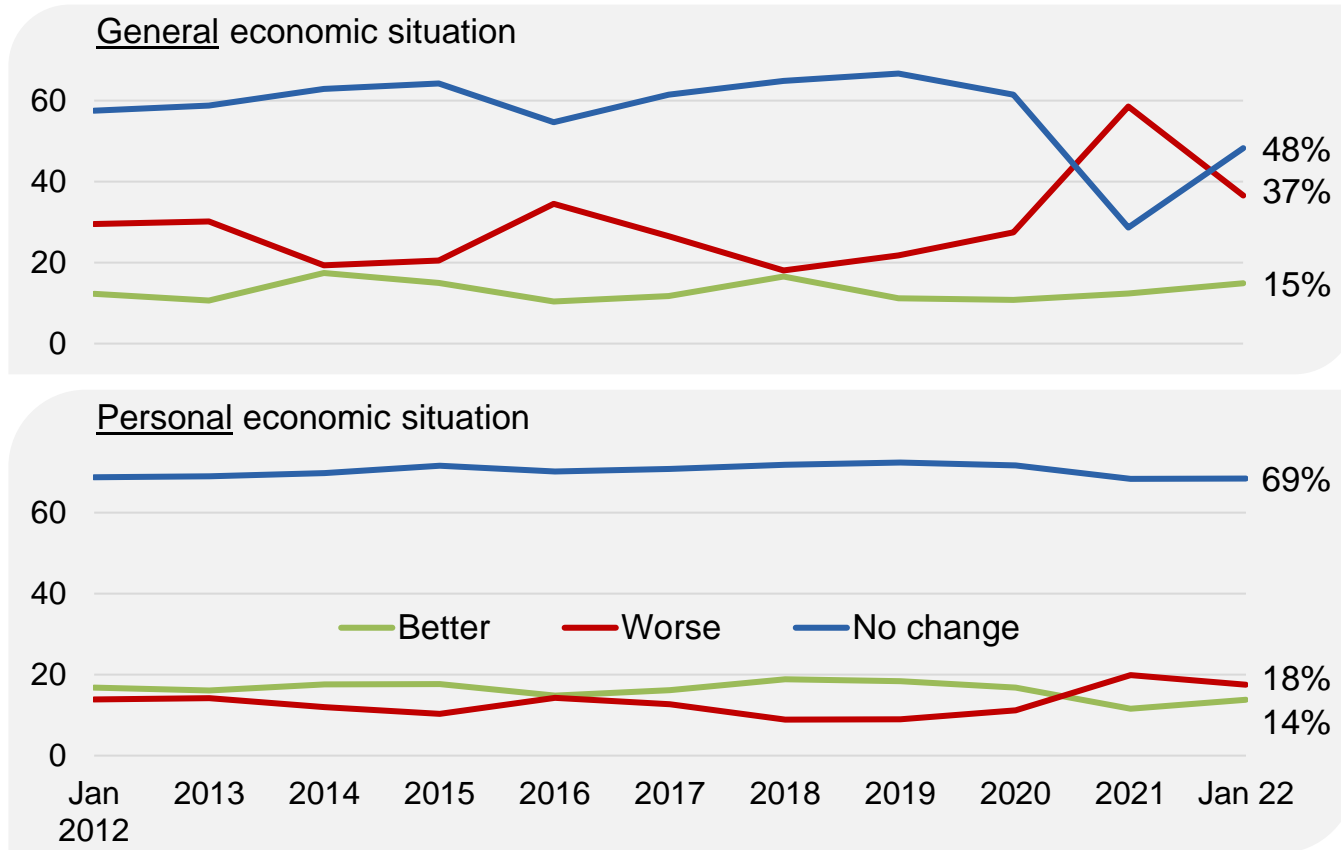
Both booking channels were able to increase the total volume since 2020. The market shares of 46% for online bookings and 36% for face-to-face booking are in line with the long-term trend.

* only holiday trips with advance booking
Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2021 lasting 5 days or more
Source: RA 2022

Outlook 2022:
A great travel year?

ASSESSMENT OF THE ECONOMIC SITUATION

Positive starting conditions for holiday travel in 2022



Assessment of the economic situation

In terms of the general economic development, the expectations have clearly brightened since January 2021: two thirds of the German population expect stability or an improvement within the next 12 months.

The view of the personal economic situation is even more important for holiday demand: just like in previous years, the majority see stable conditions. 69% (previous year: 68%) expect no change. 14% (previous year: 12%) expect an improvement and 18% (previous year: 20%) fear a deterioration.

This is an essential prerequisite for high holiday demand in 2022.

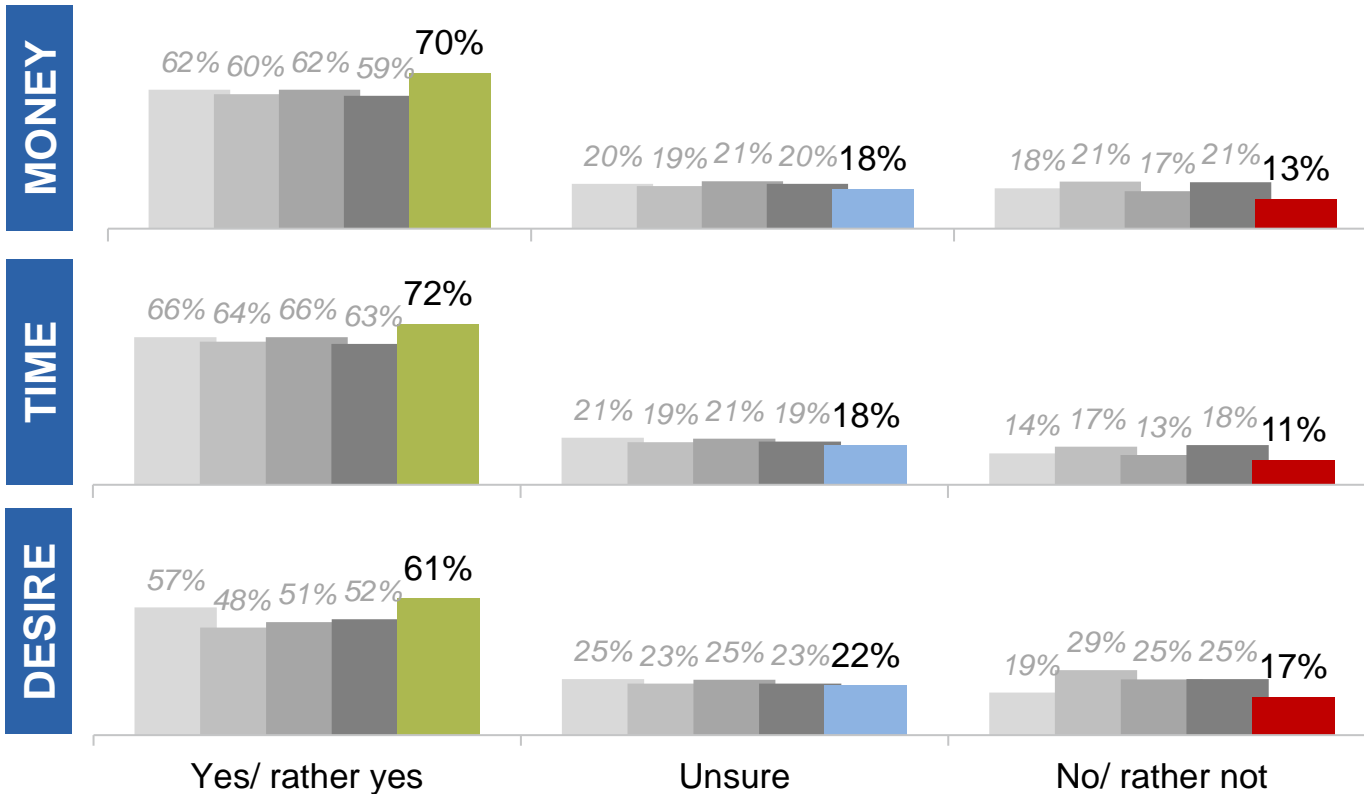
Question: How do you assess the general economic situation in Germany or your personal economic situation?

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 2022

MONEY, TIME, DESIRE TO TRAVEL 2022:

As high as never before



Starting conditions for 2022

Whether or not someone goes on holiday depends on the ability (time and money) and the desire to travel.

With 61%, the desire to travel is at an all-time high (previous year: 51%) and also the factors of time (72%) and money (70%) are rated as high as never before.

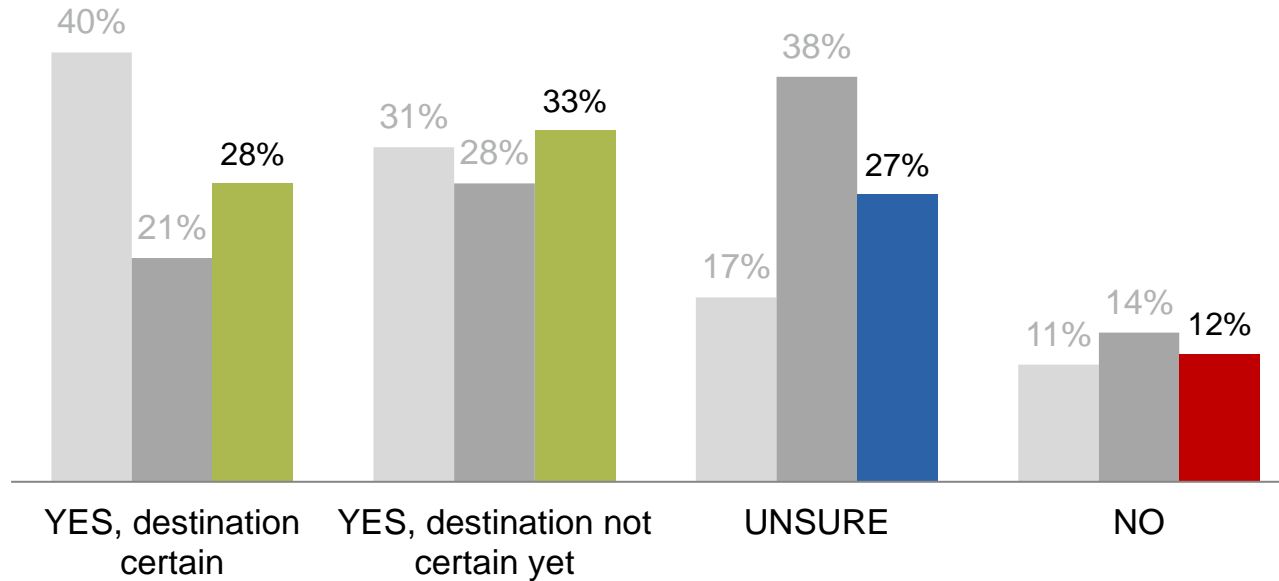
Overall, these results depict a very positive holiday mood.

- Nov. 2019 (for 2020)
- May 2020 (for remaining 2020)
- Nov. 2020 (for 2021)
- May 2021 (for remaining 2021)
- Nov. 2021 (for 2022)

TRAVEL PLANS 2022:

Most people already have definite holiday plans

In January ■ 2020 ■ 2021 ■ 2022



Status of holiday plans in January 2021

Almost two thirds of the population are planning to travel in 2022: for 28%, the destination is already certain, for 33% the destination is still open.

These results give reason to be optimistic that people will travel on holiday in large numbers in 2022, conditions permitting.

On the other hand, there is still some uncertainty in the beginning of 2022. At 27% of the population, the level of still uncertain travel planners is considerably lower than last year, but still much higher than in January 2020.

Only 12% of the population are definitely not planning to go on holiday in 2022. This figure is almost the same as before the pandemic.

Question: *Thinking about this year, do you already have holiday plans for 2022? Which of this list applies to you?*

Basis: German-speaking population, aged 14 and over, in Germany

Source: RA 2022

HOLIDAY MOTIVES

Hedonistic motives record the largest gains



January 2020 → January 2022

Treat myself, indulge
+8 %-points

Fun, amusement
+8 %-points

Do sth. for my health
+7 %-points

Relaxation
+7 %-points

Mutual experiences
+6 %-points

Ranking January 2022

Escaping daily routine, fun, sun, relaxation, fresh energy and spending time together are the most important holiday motives at the beginning of 2022. These motives are important to a majority of the population when going on holiday.

Changes since the beginning of 2020

The motives in the top 10 have been the same for years. However, there is an interesting development going on: among motives that became increasingly important for more people in the course of the last two years, we find: *treating oneself, fun/amusement, health, relaxation and mutual experiences* – more self-centred, decelerating aspects as opposed to a desire for action or new impressions.

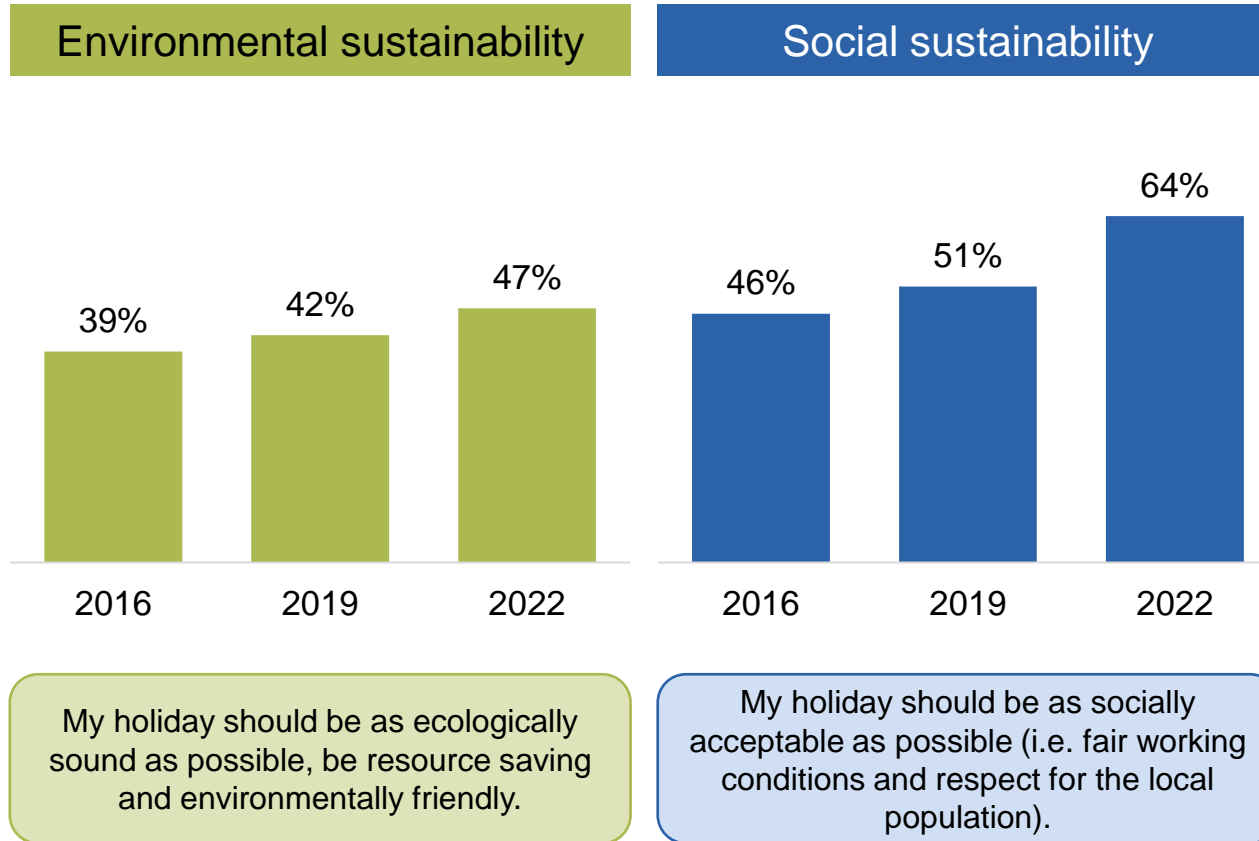
Question: *Which of these things are particularly important to you personally when you go on holiday?*

Basis: German-speaking population, aged 14 and over, in Germany

Source: RA 2022

SUSTAINABILITY AND HOLIDAYS:

Many travellers want their holiday to be sustainable



Attitude towards sustainability

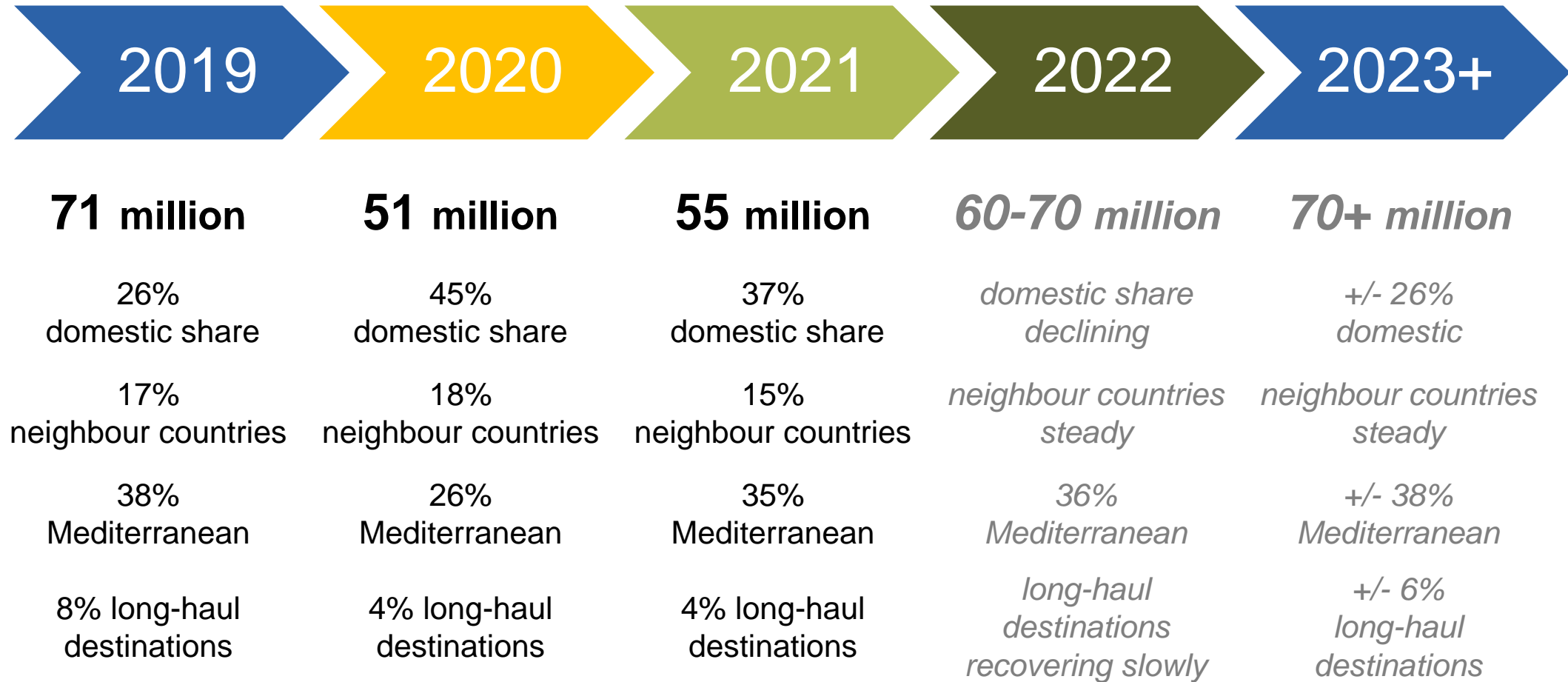
In January 2022, 47% of the population want their holiday to be as environmentally sustainable as possible, 64% strive for a socially sustainable holiday. Both figures have risen continuously since 2016, especially since 2019.

Sustainability of holiday trips 2021

Despite this positive trend in people's attitudes, the „attitude-behaviour-gap“ remains large. Compared to the high rate of sustainable attitudes, the number of holiday trips that actually paid attention to sustainability was lower: for 5% of holiday trips in 2021, sustainability was the determining factor for choosing an offer, for another 21% sustainability at least played some role for the decision.

CONCLUSION:

Trends in volume and destinations of holiday trips



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. update

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.

At the time of publication, deviations due to the Corona pandemic in 2020 could already be included in the estimates. In November 2021, an update was published in order to describe the expected effects of the pandemic in more detail. These findings are based on extensive insights from several surveys as part of the Reiseanalyse.



ISBN Trendstudie 2030: 978-3-949752-00-1

148 pages plus 44 pages update
reiseanalyse.de/trend-study-2030/

RA 2021: Kurzfassung der Ergebnisse

Struktur und Entwicklung der Urlaubsreisenachfrage

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 2020 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 *destination image*, impacts of the *Corona-Pandemic* and *Sinus-Milieus®*.

A short version of the RA 2022 will be published in autumn 2022.



ISBN: 978-3-9819158-3-9

112 pages, 90 illustrations
reiseanalyse.de/summary/

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