

## Travel trends 2019

### Starting conditions for the year.

*Contribution of the Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) to the opening press conference of CMT on January 11, 2019*

At the beginning of 2019, the FUR has prepared a first preliminary summary of 2018 and gave an outlook of the tourism trends of the new year.

#### **2018: Yet another record year**

International tourism grew by around 5% in 2018 [Source: UNWTO]. The number of international tourist arrivals worldwide is expected to be just under 1.4 billion. Every year a new record, that's the rule since 2010.

German tourism grew too. In the first ten months of the year, the number of overnight stays in Germany rose by 4% to 417 million compared to the same period last year [data from the Federal Statistical Office]. Foreign guests accounted for about 18% of this figure; the growth rate of 5% was higher than that of domestic guests (4%). Thus, Germany was able to profit from the boom in international tourism. For 2018 a total of approx. 478 million overnight stays can be expected in Germany.

According to the preliminary data based on the RA *online* at the end of 2018, FUR expects a high level of German tourism demand with a volume of approx. 71 million holiday trips (+ 2% compared to 2017) and an increase in expenditure for holiday trips to approx. 75 billion euros (+ 3%). Both figures are at an absolute high. The number of short holiday trips (lasting two to four days) also rose to 92 million (+ 1% year-on-year). Similarly, transport carriers and tourism companies also reported growth in the past year.

#### **Starting conditions for 2019**

The indicators for tourism demand in 2019 show a positive starting position.

Germans are clearly positive when assessing their personal financial situation: 25% expect the situation to improve in a year; 19% fear a deterioration. The remaining 56% see no change. The overall perceived stability of the individual financial situation is an important prerequisite for holiday tourism in 2019.

Four out of five Germans (80%) have already thought about holiday trips in 2019. Whether someone actually will travel or not is above all a question of ability (sufficient time and money?) and willingness (holiday pleasure?). That is why we collect these indicators as a basis for future tourism demand. This shows that the desire to travel is stable at 56%, the factors time (63%) and money (60%) are even more positive than in the previous year. These data point to the possibility of a slight increase in demand (number of holiday tourists) in 2019. There is also room for growth in the number of trips and in travel expenditure: 24% of Germans want to make more trips in 2019 than in the previous year, 13% less. 29% want to spend more money on travel, 14% less. All in all, these results express a positive holiday mood, which signals good starting conditions for 2019 on the demand side [Source: RA *online* Nov. 18].

## **Holiday trips 2019: Destinations and types of holiday**

The overall picture of holiday travel in 2019 will hardly differ from 2018, both in terms of destinations and types of travel. This is supported by the preferences expressed. Domestic trips (trips within Germany) in 2019 will take first place in destination ranking with around 30% of the market share. Spain, Italy, Turkey and Austria will follow. Croatia and Greece play in the top league, Egypt and North Africa are more in demand.

The constant overall picture must not hide the individual flexibility and the tendency of holidaymakers for variety: 43% plan to visit a destination this year in which they have not been before [Source: RA *online* Nov. 18].

### **Inspiration and information:**

#### **Personal information does not lose its importance in the digital world!**

Internet use has become standard for the majority of travellers in the preparation of holiday trips. This applies in particular to information on concrete topics such as weather or transport connections.

But before that, in the decision-making process, there is the inspiration phase: Where could we go this time? What kind of trip should it be? Here the interest is awakened, the desire for a certain type of holiday or destination is aroused. In this phase, word-of-mouth and the use of "offline" media play a prominent role. [Source: RA 2017 and RA 2018].

## **Camping & Caravaning**

Approximately 3.4 million holiday trips are made each year with a caravan or motorhome. If camping holidays in a tent are also taken into account, this adds up to as much as 4.4 million. In addition, there are about 5 million short camping holiday trips.

Interest in caravanning holidays is growing in the long term: 10% (2002: 5%) of the population are interested in travelling by motorhome in the future, around 9% (2002: 5%) are thinking of a caravan holiday [Source: RA 2018].

## **Baden-Württemberg**

Almost 9 million of the total 71 million holiday trips come from Baden-Württemberg. The share of trips abroad is above average here (80% of vacation trips from Baden-Württemberg; 72% for all vacation trips). In addition to trips to the Mediterranean (40%) and the Alps (15%), the people of Baden-Württemberg also enjoy long-haul destinations (11%).

People from Baden-Württemberg are also very active regarding short holidays: 13 million short holiday trips in 2018 equals to 13% of the demand from Germany [Source: RA *online* Nov. 18].

## **Holiday trips to Baden-Württemberg**

However, Baden-Württemberg is not only important as a source market but also as a travel destination for Germans, not only for short trips, but also for longer holidays.

The state is also an important destination for its own population. 20% of holidaymakers come from Baden-Württemberg, the second most important source market in Germany after NRW. Everything that is done for tourists in Baden-Württemberg also increases the quality of life of the local population.

## Holidays are "outdoor"

For many holidaymakers, holiday trips are synonymous with "being outdoors". One wishes beautiful weather, to experience nature, a healthy climate. Most classic holiday activities take place outdoor: swimming, hiking, visiting natural attractions, cycling, winter sports, etc. But "outdoor" does not always mean sweaty activities for everyone. Experiencing nature, recreation and relaxation are often in the foreground.

28% of all holiday trips are described by travellers as "nature holidays", 65% as "sun&beach holidays" [Source: RA 2018; multiple answers]. Both types of holiday are defined by being outdoors.

Destinations for nature holiday are more often closer to home than with other types of holiday. Destinations in Germany (also Baden-Württemberg) and in the Alps are particularly popular for nature holidays.

## Outlook

For 2019, the overall signs in the travel world are clearly positive. Germans have grown fond of travelling. The desire to go on holiday is already pronounced for 2019. More trips and higher expenses are planned. This suggests that demand for tourism services will stay at least stable. The top destinations will remain more or less the same.

Individually, holidaymakers are curious and flexible. The stability of the market does not mean that individual tourists always do the same thing. Customers have become knowledgeable, travel experienced, sophisticated, multi-optional; these are their characteristics.

The tourism industry, too, is looking confidently to 2019. The industry is challenged by the global socio-political landscape (e.g. Brexit, CO2 reduction), but also within itself, for securing reliable flight schedules for instance. Overall, competition is fierce, both for the attention of potential guests and for their actual trips.

*This document has been created by the Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) for the opening press conference of CMT 2019. The FUR is the responsible body for the annual Reiseanalyse (RA) [www.Reiseanalyse.de]. For the preparation of this document, the FUR has conducted a survey in November (representative of the German-speaking resident population 14-75 years; n = 2,530) and has analysed the time series of the Reiseanalyse (annually n > 7,500, representative for the German-speaking resident population 14 years old and older).*

*The author, Prof. Dr. Martin Lohmann, Diplom-Psychologe, is FUR's scientific consultant. He leads the Institute for Tourism Research in Northern Europe (NIT) in Kiel and teaches consumer behaviour and tourism psychology as a professor in Lüneburg, Bern, Vienna and Innsbruck.*

*More information: [www.reiseanalyse.de](http://www.reiseanalyse.de) and [www.nit-kiel.de](http://www.nit-kiel.de).*