



RA ReiseAnalyse

2019

Selected first results
of the 49th Reiseanalyse for the ITB 2019

The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the Reiseanalyse 2019 survey.

Conducted annually, the 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.

Record year 2018 – Good prospects for 2019

In 2018 there were more people on holiday than ever before

78% of the population go on at least one holiday trip

Tourism demand in Germany is booming. In 2018, 55 million people went on holiday, almost 1 million more than in the previous year. For the first time, the holiday travel propensity exceeded 78%. This indicator reflects the proportion of the population who went on at least one holiday of 5 days or more in 2018. The number of holiday trips was slightly above 70 million, the total volume of expenditure was over €71 billion.

In addition, about 35 million short break travellers went on a total of 88 million short breaks with a duration of 2 to 4 days and spent more than €23 billion.

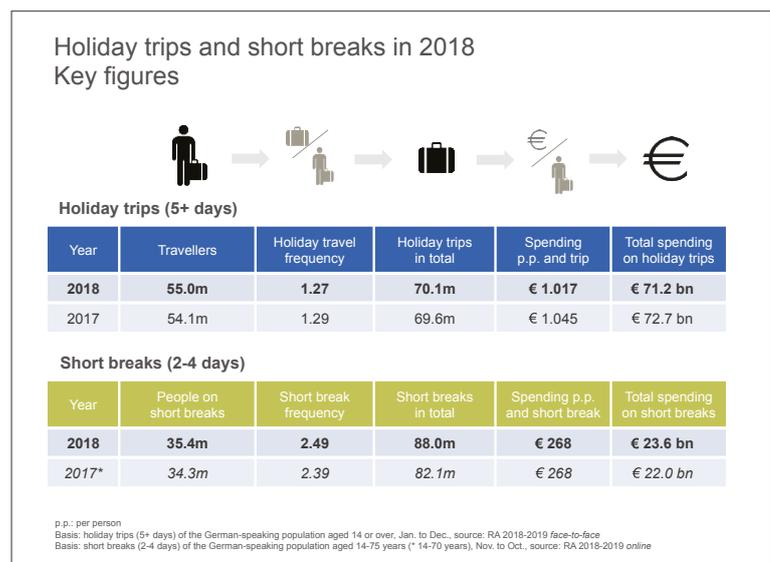
Holiday trips (5+ days): 70m

Short breaks (2–4 days): 88m

Good prospects for 2019

Holiday mood: Positive!

Expenditure plans: Probably a little more



At the beginning of 2019, Germany is again in the mood for holidays. In January, more than 71% of people in Germany already had definite or provisional plans to go on holiday in 2019. Only 11% were certain that they would not go on a holiday trip in 2019.

The outlooks for the current year are also very good in terms of holiday spending: Compared with the previous year, there are significantly more people intending to spend more on holidays in 2019 (29%) than people who want to save on holidays (14%).

The selected first results presented here have been checked, but variations in the final data cannot be ruled out.

Text: Ulf Sonntag, Martin Lohmann

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International trips continue to boom

Germans are drawn to far away destinations. In 2018, 73% of all holiday trips went abroad. This equates to more than 51 million trips, more than ever before.

Nevertheless, Germany remained the most important holiday destination for Germans, accounting for 27% of all holiday trips. The ranking of top destinations in 2018 was stable. In Germany, Mecklenburg-Western Pomerania was ahead of Bavaria, Schleswig-Holstein and Lower Saxony. Abroad, Spain was the undisputed leader, followed by Italy, Turkey and Austria. 8% of all holiday trips were long-haul, with destinations outside Europe and the Mediterranean region.

The 2018 winners included the Netherlands, France and Egypt. On long-haul routes, North America and Southeast Asia were most popular.

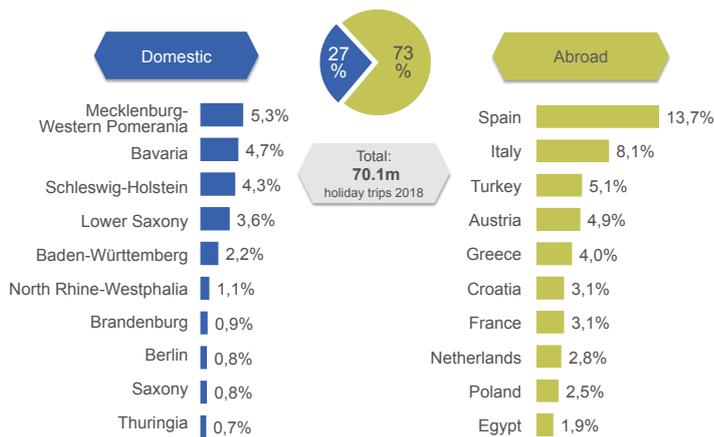
More international trips than ever before

Germany remains the most important holiday destination

Stable destination rankings in Germany and abroad

Winners abroad: Netherlands, France, Egypt

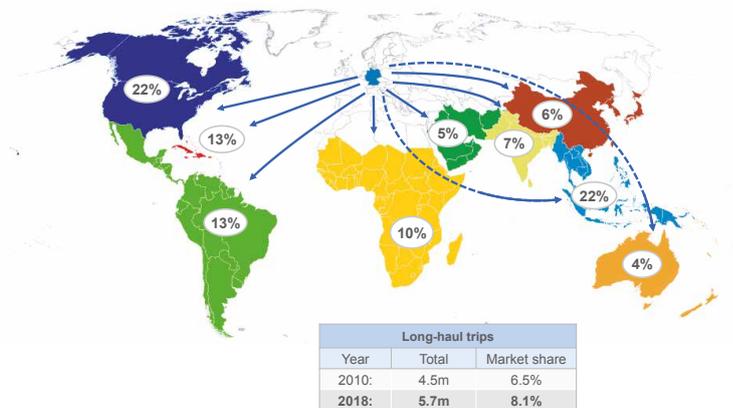
Top 10 holiday destinations in 2018



Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over
Source: RA 2019 face-to-face

8% of all holiday trips are long distance trips: North American and South-east Asian destinations dominate

Long-haul trips in 2018 – market share by world region



Basis: holiday trips (5+ days), long-haul destinations only; total sum > 100% due to rounding
Source: RA 2011, 2019 face-to-face

This data is based on holiday trips (5+ days) of the German-speaking population aged 14 or over. Business travel and trips of less than 5 days are not included. This must be taken into account when comparing the data with official statistics, for example, which generally use different definition criteria.

Holiday travel behaviour: Air travel and camping on the rise

Transportation:
Car is the most important, followed by air travel

Accommodation:
Hotels dominate overall. Domestically, holiday apartments and houses are most popular

Slight declines in holiday duration and travel expenditure

The trend for international destinations is also reflected in travel behaviour: We continue to see air travel slightly on the rise. The camping segment registers an overall increase thanks to a significant growth in Germany.

Due to the slight decline in holiday duration, total expenditure per person and holiday trip is slightly lower. Expenditure per day and person, however, remains stable.

	2010	2017	2018	2018		
	Total	Total	Total	Domestic	Abroad	
<i>Basis: holiday trips 5+ days = 100%</i>						
	69.5m	69.6m	70.1m	18.9m	51.1m	
Means of transport	Car/motorhome	48%	46%	45%	74%	34%
	Plane	37%	40%	41%	1%	56%
	Coach	8%	7%	6%	8%	5%
	Train	5%	5%	5%	14%	2%
Accommodation	Hotel/motel/guesthouse	47%	48%	48%	28%	55%
	Holiday apartment/home	24%	25%	25%	37%	20%
	Camping	6%	6%	7%	10%	6%
Ø Average holiday spending per person and trip						
	€ 845	€ 1,045	€ 1,017	€ 603	€ 1,170	
Ø Average travel duration in days						
	12.8	12.6	12.5	10.2	13.3	

Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over
Source: RA 2011, 2018, 2019 face-to-face

Holiday organisation/booking: online bookings ahead for the first time

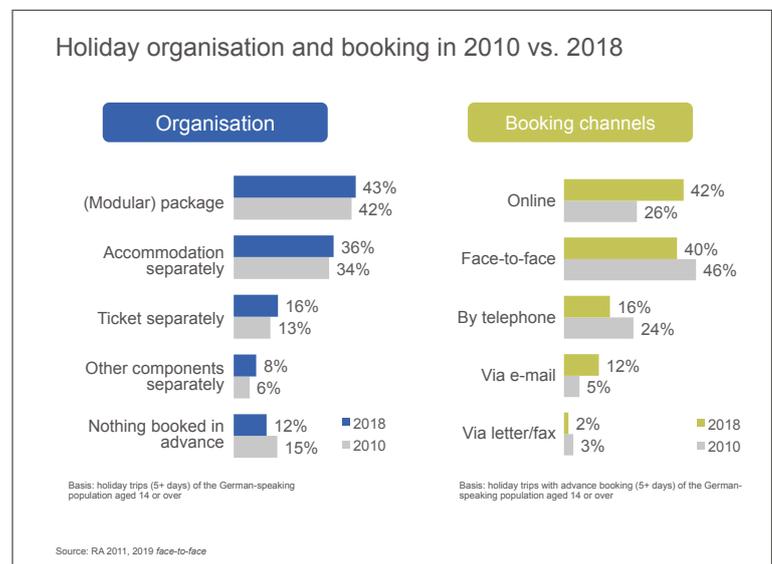
Digitalisation is changing booking behaviour in the long term

For the first time, online bookings dominate the booking channels

Further increase in online bookings is expected

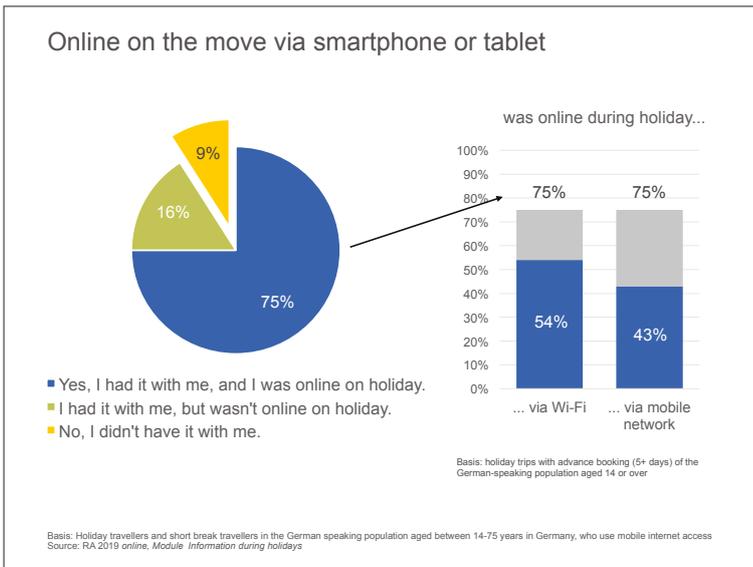
Stability in the organisation of holidays: package/modular holidays are leading

For the first time, in 2018 more holiday trips were booked online than in personal contact. This marks a milestone in the long-term structural change in holiday booking that is driven by digitalisation. It can be assumed that the share of online bookings will continue to rise in the coming years. Regarding holiday organisation, package travel/modular travel remain in front of separate bookings of accommodation.



Information on the move: Often weather forecast and route planning

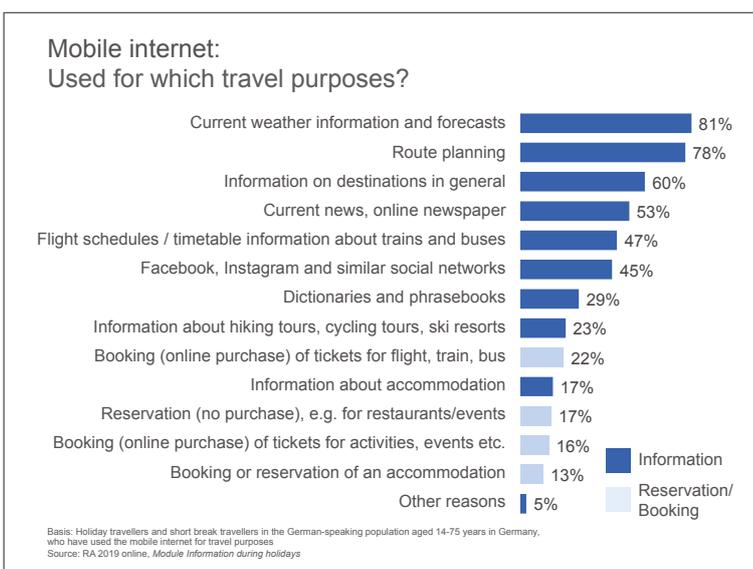
Smartphones and tablets are frequent companions on holiday trips and short breaks: Three-quarters of holiday and short break travellers in Germany who have access to the mobile internet take a smartphone or a tablet with them and go online during their holiday. A further 16% take their device with them, but do not go online. Access via Wi-Fi is slightly more popular than access via the mobile network.



Almost everyone takes their smartphone or tablet on holiday

At the holiday destination, there is a slight preference for using Wi-Fi rather than the mobile network

Weather information and route planning are most popular in terms of tourist use of the mobile internet while on holiday, with usage rates of around 80% each. Information on destinations in general (cities/regions/countries), sights, events, restaurants and local shops account for around 60%.



Tourist use of the mobile internet at the destination:

1. weather forecast
2. route planning
3. destination information
4. news
5. timetables/
flight schedules

More information in the module „Information during holidays“

Nature on holiday: What makes a nature holiday special?

Nature on holiday is important to most people

Nature holiday is one of the most popular types of holiday

For many people, nature and holidays are inseparable. "Nature holidays" are regularly the fourth most important type of holiday, after "holidays to rest and relax", "beach holidays" and "family holidays". "Enjoy nature" is one of the top 10 holiday motives and only for about 20% of holiday travellers, nature does not play a major part when travelling. Regarding nature holidays, enjoying the landscape and being active in nature are the most important aspects. At the same time, the experience of nature should not cause harm to it.

What is important to customers when they go on a nature holiday?

Enjoying the nature and the landscape

Being active in nature

Not harming the nature through the stay

Experiencing natural water landscapes

Buying regional products

Experiencing nature as unspoilt as possible

Basis: Holiday travellers (5+ days) in the German-speaking population aged 14+ years
Source: RA 2019 face-to-face, Module Holidays and Nature

More information in the module "Holidays and Nature"

What role does sustainability play in holiday planning?

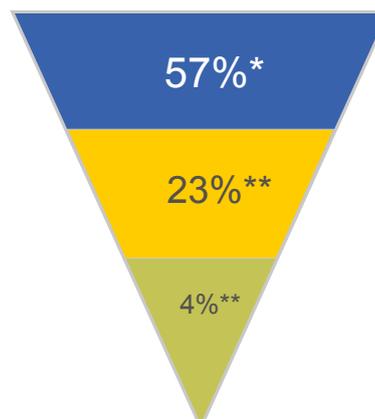
For the majority of tourists, sustainability is an important aspect on holidays

In actual travel behavior, however, sustainability plays a minor role

For the first time, demand-based indicators for sustainable holiday trips have been developed based on the RA 2019 data. There are now data available about the significance of sustainability on holiday trips and short breaks, as well as about environmental certificates and CO₂ compensation – partially financed by the German Federal Ministry for the Environment. The data shows that there is still a substantial gap between sustainable attitude and actual sustainable behaviour on holiday trips. Also, in CO₂ compensation, there is still a lot of room for improvement: In 2018, only 2% of air travel was compensated.

Holidays with CO₂ compensation or eco-labels on a low level

The role of sustainability in holiday travel



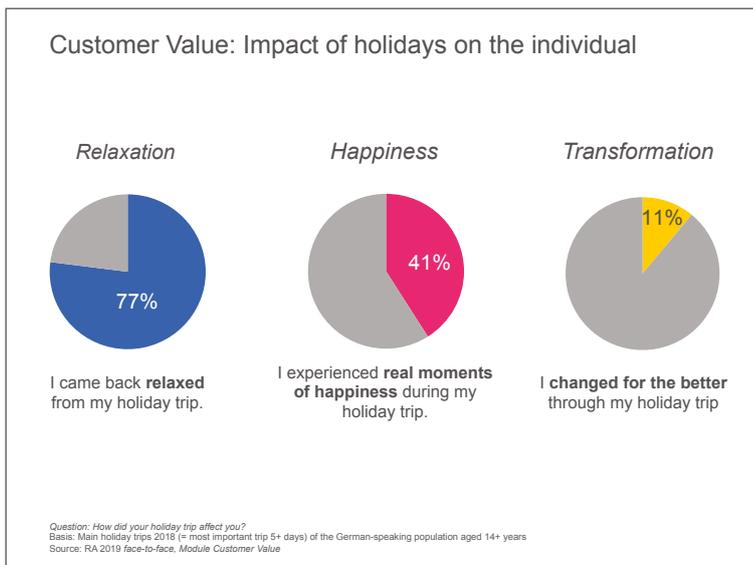
Basis: *Holiday travellers (5+ days) in the German-speaking population aged 14+ years, value for "is absolutely true" and "is true";
** Holiday trips 2018 (5+ days) of the German-speaking population aged 14+ years
Source: RA 2019 face-to-face

Customer Value: The power of travel

When we travel, we usually have specific ideas about what we expect from a trip for us personally. After a trip we can describe the effects a journey has had on us. RA 2019 focusses for the first time on this topic with our module “Customer Value”. The first results are pleasant: Almost 80% of holidaymakers in 2018 came back relaxed, 41% experienced real moments of happiness. After 11% of trips, holidaymakers report positive, personal changes. They live more attentively, more consciously.

The vast majority of holidaymakers come back well rested

For many, holidays cause real happiness, for some they even result in a general positive change



More information in the module „Customer Value“

Read more in our “Summary of the Reiseanalyse”



The summary of the Reiseanalyse provides a detailed abstract of key results of the Reiseanalyse data. In addition to selected results, time series and comparisons with previous years concerning holiday trips of five days or more, it includes an analysis of short breaks.

Selected results from modules of the Reiseanalyse are also presented, as well as Sinus-Milieus®.

The summary of the Reiseanalyse 2018 is available in a softback version for € 290 (excl. VAT), in German and English language versions. The publication consists of approximately 100 pages.

The summary of the Reiseanalyse 2019 will be published in autumn 2019.

Detailed summary of German travel behaviour

Key data in time series

Selected insights into module results and Sinus-Milieus®

With your participation in the RA 2019 you benefit from:

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

Become a partner of the Reiseanalyse 2019

What is the Reiseanalyse?

The Reiseanalyse is a survey of German holiday travel demand for long and short holiday trips and has been conducted every year since 1970. More than 12,000 representative interviews are carried out all over Germany. The survey provides the latest reliable, high-quality data for the tourism industry, which can be used in strategic planning, market analysis and marketing activities. The main focus is on user friendliness and individual reporting of results.

Many straightforward options for individual analysis and benchmarking are available. The Reiseanalyse is a multi-client study and all costs are shared between more than 25 partners. This ensures a comparatively low entry level price, with each client paying only for the services required.

How much does it cost?

Results of the standard question programme € 10.900

Modules
€ 5.500

Individual components & evaluations

Raw data & software
from € 3.900

Who uses the Reiseanalyse?

Partners and users of the Reiseanalyse include national and international tourism organisations, tour operators, transport companies, publishing companies, associations as well as universities and research facilities (a selection is listed at www.reiseanalyse.de).

Who is responsible for the Reiseanalyse?

The Reiseanalyse is carried out by the FUR (Forschungsgemeinschaft Urlaub und Reise e.V.), an independent non-profit organisation solely dedicated to the implementation and further development of the Reiseanalyse. A team of three partners implements the Reiseanalyse: the FUR together with the NIT (Institute for Tourism Research in Northern Europe) are responsible for organisational and scientific aspects of the survey. Ipsos is responsible for field work and data processing.

Find out more:

Contact us for a non-binding consultation and an individual offer for participation. We will explain the potential benefits for your company in detail.



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RA 2019**

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