

A photograph of a family hiking on a dirt trail. In the foreground, a woman with a large yellow backpack and a young child are walking. The woman is holding the child's hand. They are both using trekking poles. In the background, a man and another child are also hiking. The trail is surrounded by tall grass and wildflowers, with a forest and hills in the distance.

Selected first results of the 54th 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 2024. 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.

2023: Record holiday expenditure

For 2023, there were almost 55 million holiday travellers (5+ days), more than in the previous year and only slightly fewer than in 2019. At the same time, the total volume of holiday trips fell slightly to 65 million. Total expenditure on holiday travel rose significantly to a new record of almost € 87 billion.

In terms of destinations, there was a further boost for outbound travel: 78% of holiday trips were to destinations outside Germany, 22% were domestic. Abroad, Spain dominated ahead of Italy, Turkey, Croatia and Greece. The market share of long-haul holidays was a record-breaking 9%. This was accompanied by further growth in air travel, hotel accommodation and package holidays – with market shares well above the pre-corona level. The increase in trip duration also matches this. This averaged 13.1 days in 2023 – significantly longer than in 2022 (12,6 days) and also longer than in 2019 (12.4 days).

2024: Optimism despite all crises

Despite the comparatively negative outlook for the economic situation, the Germans' holiday plans are positive: 73% of the population are planning to travel in 2024: 41% have already decided on their destination, while 32% still have their destination open. That is more than a year ago and similar figures to the years before the COVID pandemic.

Extensive travel history as well as a wide range of travel motives and holiday interests ensure that at least one long holiday trip a year is a part of life for most people. If money is tight, people tend to save in other areas rather than on the holiday itself. And there are also different strategies for holiday spending, which ultimately ensure that only few people miss out on their holidays for financial reasons.

This is a good basis for a successful tourism year in 2024.

Review 2023:

Record expenditure and records for destinations abroad

VOLUME OF HOLIDAY TRAVEL IN 2023: Slightly more travellers & slightly fewer trips, spending at record level

Holiday travellers



54.6 million

2022: 53.1 m
2021: 47.8 m
2020: 44.6 m
2019: 55.2 m

Holiday trips



65.0 million

2022: 67.1 m
2021: 55.1 m
2020: 50.5 m
2019: 70.8 m

Expenditure on holiday travel



86.9 billion

2022: 80.1 bn
2021: 56.0 bn
2020: 45.1 bn
2019: 73.1 bn

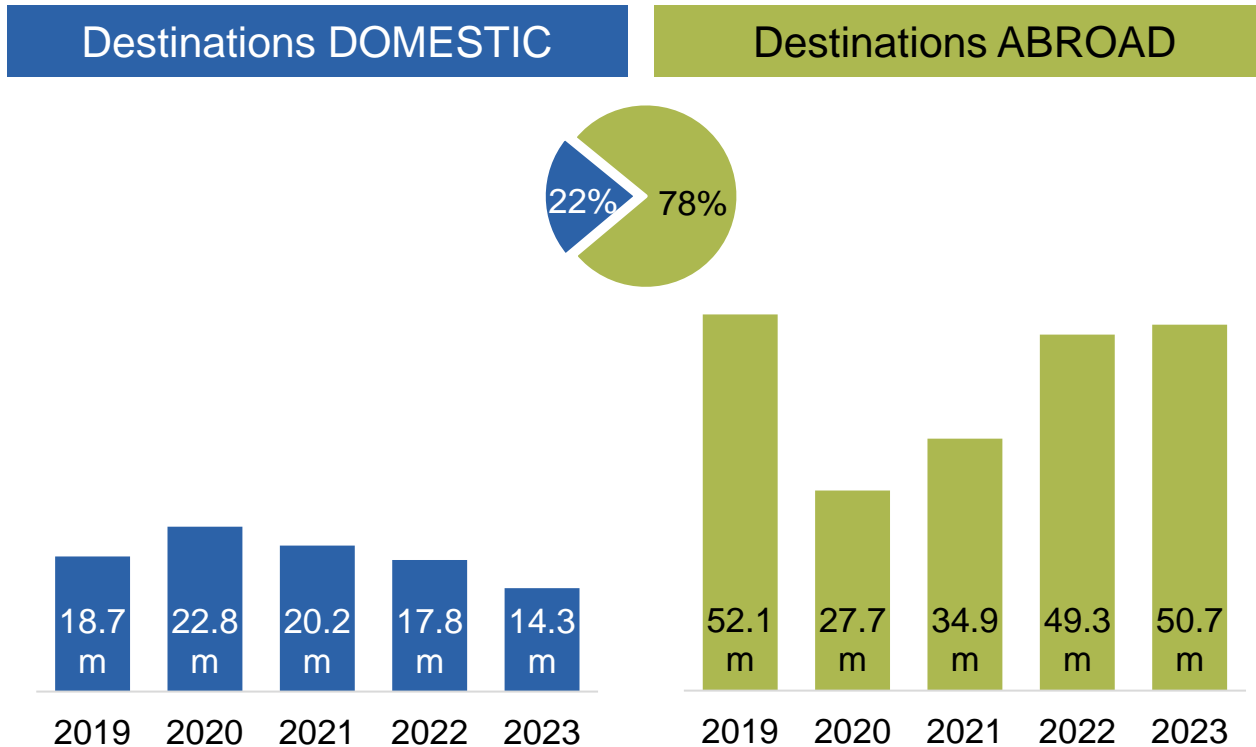
Holiday travel (5+ days)

The holiday travel propensity, the proportion of those who took at least one holiday trip of 5+ days in the year, was 77% in 2023. This corresponds to 54.6 million people. The figure has risen slightly compared to the previous year (75%) and is now almost on a par with 2019 (78%). In contrast, the number of holiday trips fell slightly year-on-year to 65 million. In terms of travel expenditure, 2023 was another record year: at € 86.9 billion, the volume was € 7 billion higher than in 2022.

Short breaks (2-4 days)

For the short holiday segment (of the 14-75 year olds), the key figures for 2023 are: 74 million short holiday trips with total expenditure of € 27 billion. These are very similar figures to the previous year and therefore slightly fewer trips than in 2019.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2023: Proportion of trips abroad higher than ever before



Market shares domestic vs. abroad

Travelling abroad continues to be a clear trend in 2023. At 78% of all holiday trips, the share is higher than ever. At the same time, domestic holidays are down to a market share of 22%.

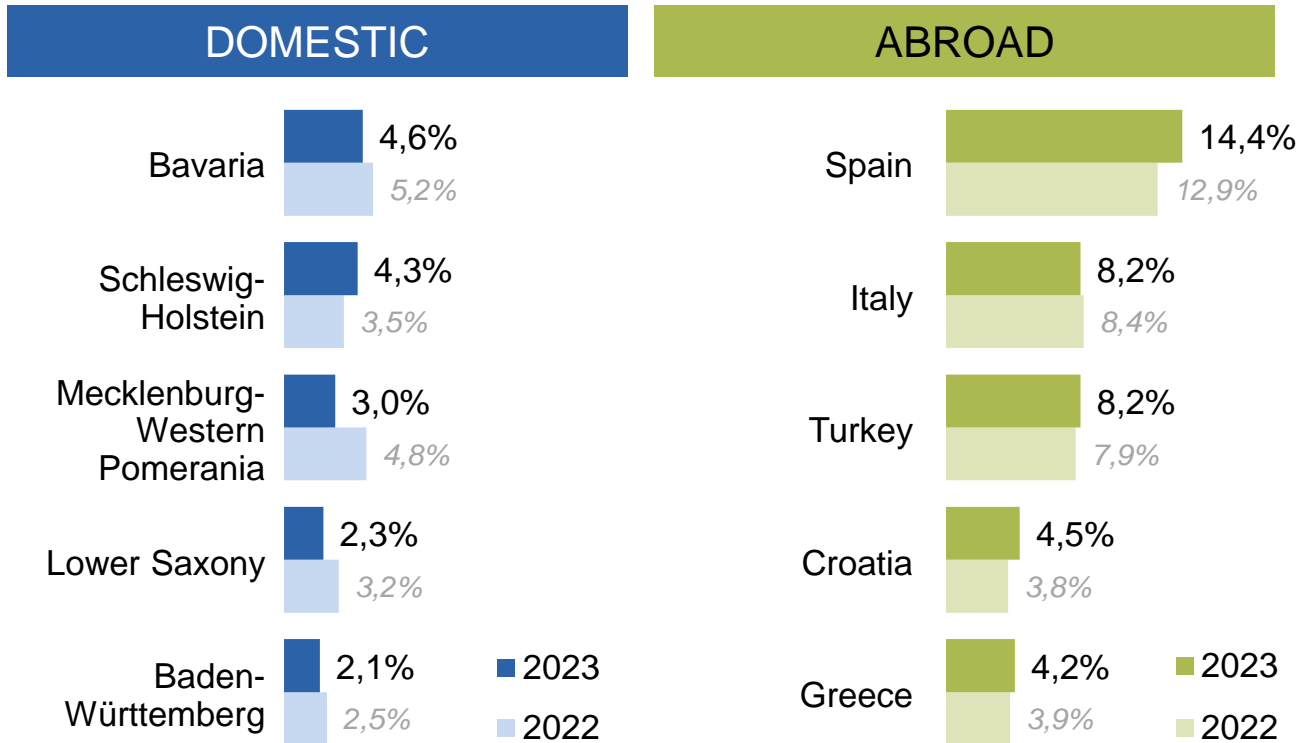
Domestic vs. foreign holiday volume

Destinations abroad account for almost 51 million holiday trips in 2023, almost 1.5 million more than in the previous year and a good 1 million less than in 2019.

Despite its loss of market share, Germany is still by far the No. 1 holiday destination, although there was a decline of just over 3 million holiday trips compared to 2022.

Almost 80% of short holiday trips (2-4 days) in 2023 were domestic, similar to 2022 and 2019.

DESTINATIONS FOR HOLIDAY TRAVEL IN 2024: Bavaria is top within Germany, Spain is top abroad



Domestic destinations

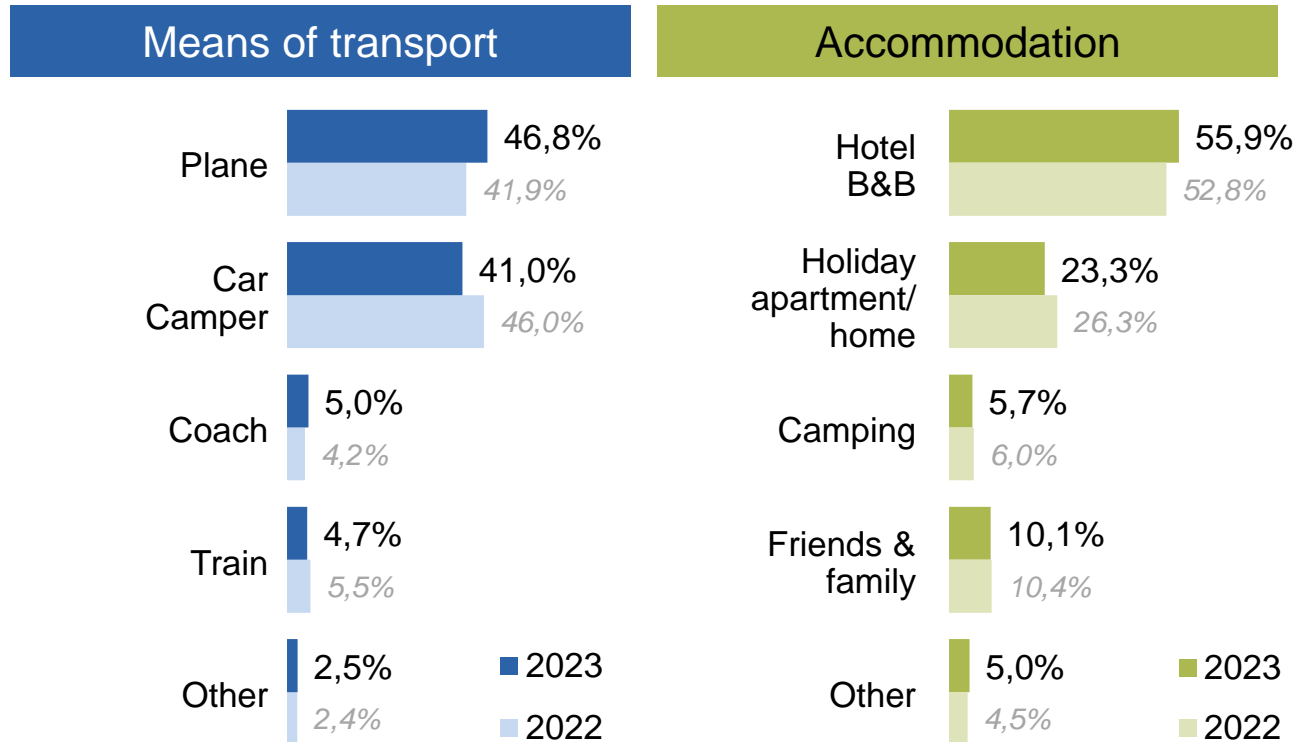
Bavaria remains at the top of the ranking of the German federal states with the highest demand. Behind it, Schleswig-Holstein and Mecklenburg-Western Pomerania change positions. They are followed by Lower Saxony and Baden-Württemberg. With the exception of Schleswig-Holstein, all of these destinations have lost market share compared to the previous year.

Destinations abroad

Spain continues to expand its dominance among the destinations abroad. It is followed by Italy, Turkey, Croatia and Greece with similar or slightly higher market shares than in the previous year. Austria is in 6th place with a market share of 3.9%, while long-haul destinations reach a new record of 9.3% (2022: 6.9%).

HOLIDAY TRAVEL BEHAVIOUR IN 2023:

Significant growth in air and hotel travel compared to 2022



Mode of transport

The increase in air travel (+2.3 million more holiday trips than in 2022) is in line with the dynamics of the destinations. The share of air travel is higher than ever, with the volume being at the same level as 2019.

Accommodation

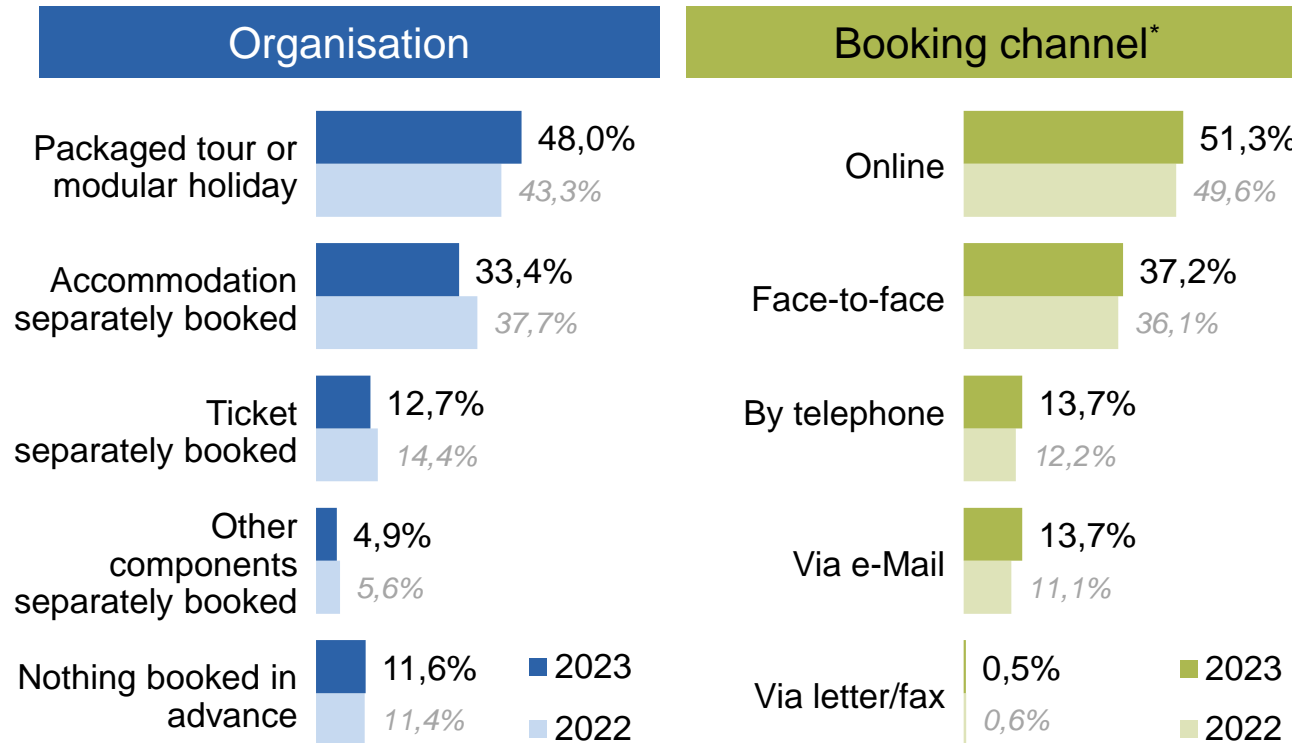
The trend in accommodation is corresponding. Hotels are recording further increases in market share and are now above the 2019 level.

Trip duration and expenditure

The average journey duration in 2023 was 13.1 days. This is significantly longer than in 2022 (12.6 days) and also longer than in 2019 (12.4 days). More was spent per person per trip in 2023 than ever before, on average of €1,337 (2022: €1,194; 2021: €1,017; 2020: €892; 2019: €1,032).

ORGANISATION & BOOKING FOR HOLIDAY TRAVEL 2023:

Package holidays in the lead, online bookings dominate



Holiday organisation

In connection with the more frequent choice of destinations in the Mediterranean region, the number of package holidays increased significantly in 2023 compared to the previous year. At the same time, there were slightly fewer individual bookings than in 2022.

Booking channels

In 2023, more than 51% of all holiday trips were booked online. Services were booked in person for approximately 37% of all holiday trips.

The increase in online bookings is in line with the long-term trend. Contrary to the long-term downward trend, bookings made in person currently appear to be stabilising.

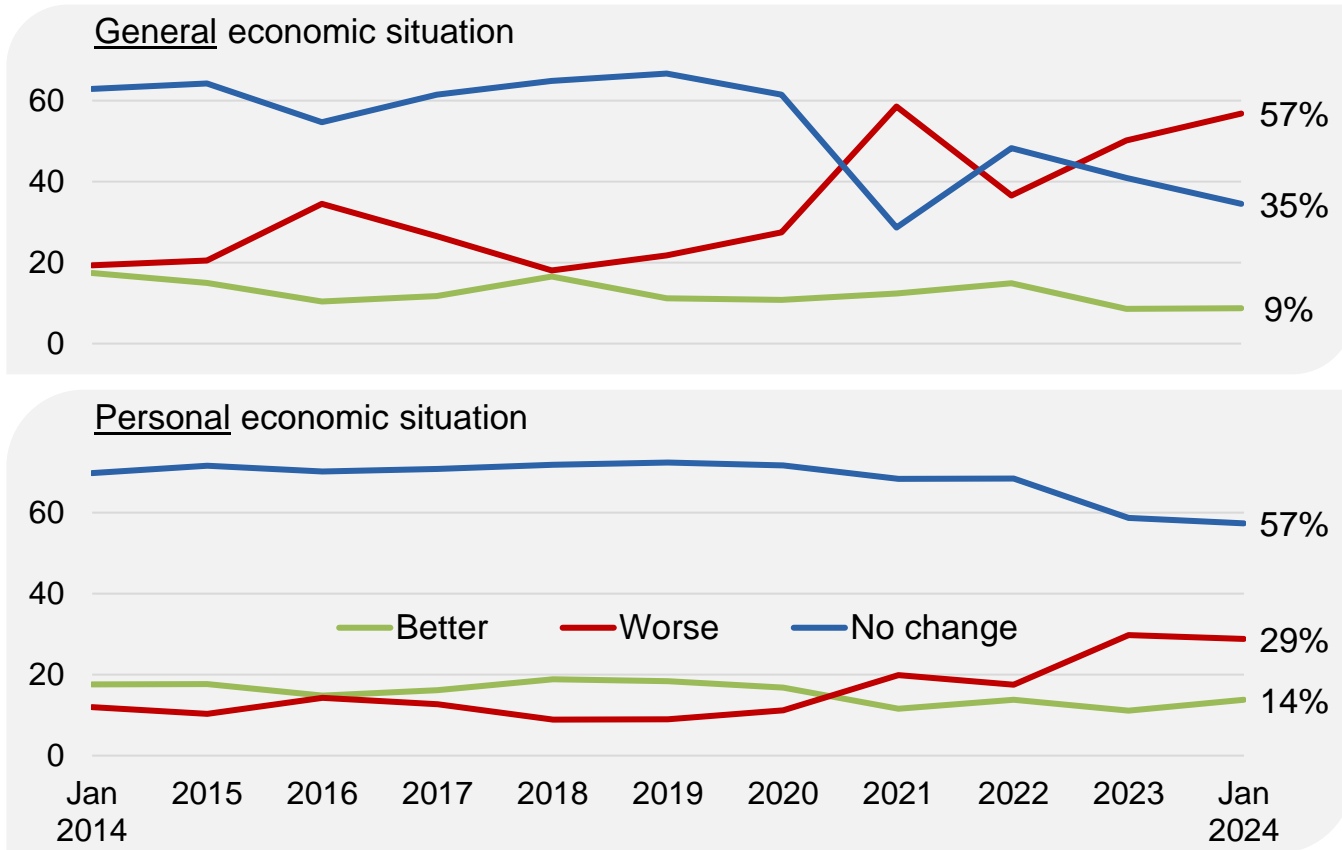
* only holiday trips with advance booking
 Basis: German-speaking population, aged 14 and over, in Germany - holiday trips 2021 lasting 5 days or more
 Source: RA 2024

Outlook 2024:

A good tourism year despite crises?

ASSESSMENT OF THE ECONOMIC SITUATION

Personal outlook very similar to the beginning of 2023



Assessment of the economic situation

In terms of general economic development, expectations have deteriorated further compared to January 2023. 57% of the population expect a decline in the coming 12 months.

Even more important for holiday demand is a look at the personal economic situation: the vast majority, namely 57% (previous year 59%), expect no change. 14% (previous year 11%) expect an improvement, 29% (previous year 30%) fear a decline.

Although this is still a comparatively negative assessment of the situation, it means that 71% of the population have a stable or even positive personal economic outlook.

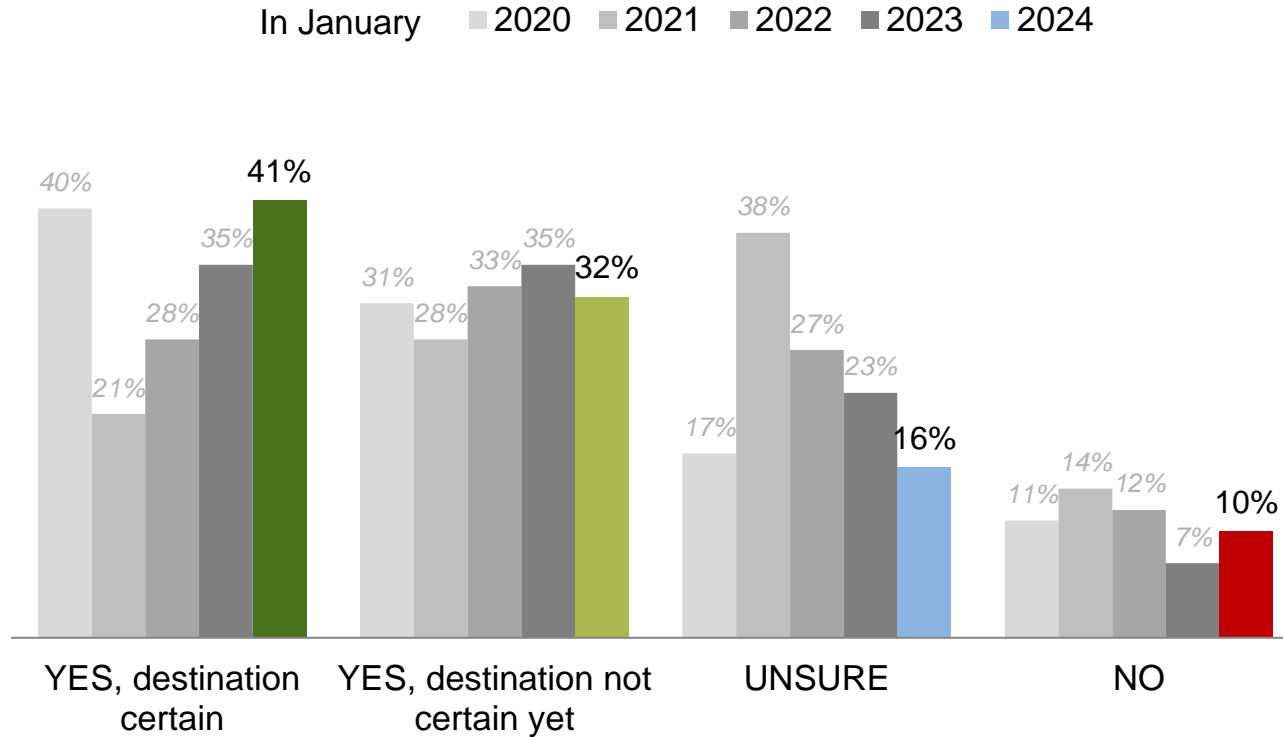
Question: How do you assess the general economic situation in Germany or your personal economic situation?

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 2024

TRAVEL PLANS 2024:

Most people already have definite plans for holiday trips



Status of holiday plans in January 2024

Despite the comparatively more negative outlook for the economic situation, the Germans' holiday plans are quite positive:

73% of the population plan to travel in 2024: For 41%, the destination is already fixed, for 32% the destination is still open. This is a good basis for a successful tourism year in 2024.

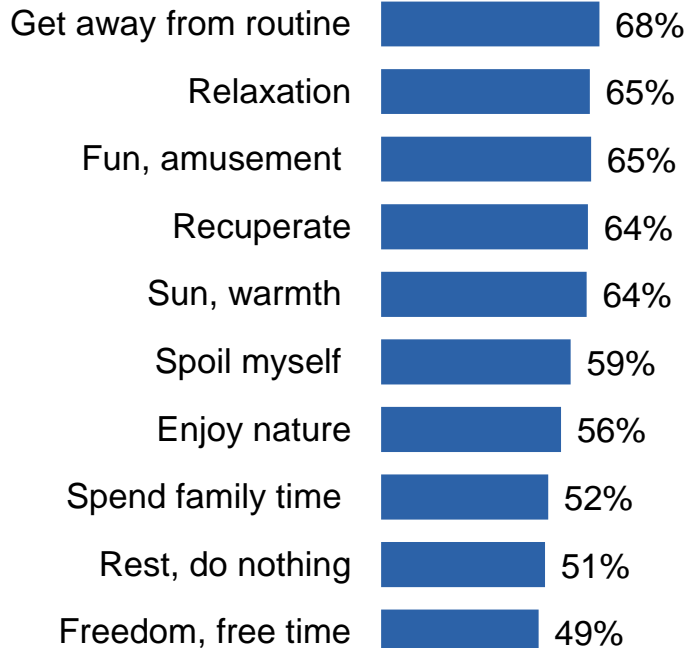
At 16%, the proportion of those who are unsure is at the same level as before the pandemic, as is the figure for those who are definitely not planning a holiday trip in 2024 (10%).

Question: *Thinking about this year, do you already have holiday plans for 2024? Which of this list applies to you?*
Basis: German-speaking population, aged 14 and over, in Germany
Source: RA 2024

GENERAL HOLIDAY MOTIVES

Desires and wishes have a stabilising effect on demand

Top 10 motives



Growth since 2019

Curiosity, exchange, destination interest

*Nature, new impressions,
culture, new experiences,
travelling around, share
experiences with others,
discovering*

Self-orientation, hedonism

*Fun, indulgence,
entertainment, beauty, health*

Holiday motives in January 2024

The general holiday motives show that there are many good reasons for people in Germany to go on holiday. People are looking to get away from the daily routine, relaxation, fun and amusement, recuperation, sun and warmth, being spoilt and enjoyment of nature.

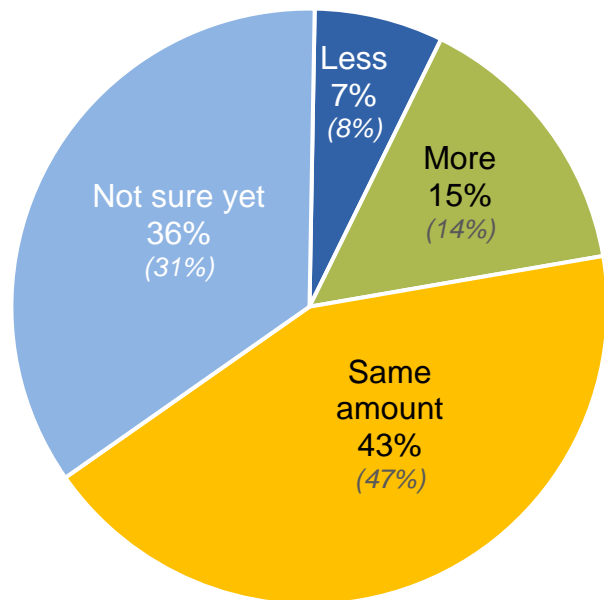
The average number of motives mentioned rose from 10.4 in the beginning of 2020 to 11.7 in January 2024.

The ranking of the top 10 motives is very stable. An increase in importance compared to before the pandemic can be found in two areas in particular: On the one hand, motives of curiosity, exchange and interest in destinations, and on the other, motives with self-reference and hedonism.

EXPENDITURE PLANS FOR HOLIDAY TRIPS IN 2024

Most plan to spend the same amount as last year

In 2024, will you spend less, more or the same amount?



Question: *From today's perspective, what are you planning for your holiday trips in 2024 compared to 2023? Will you spend less, more or the same?*

Basis: German-speaking population aged 14 and over; figures from January 2023 in brackets

Source: RA 2023 and RA 2024

Expenditure plans in January 2024

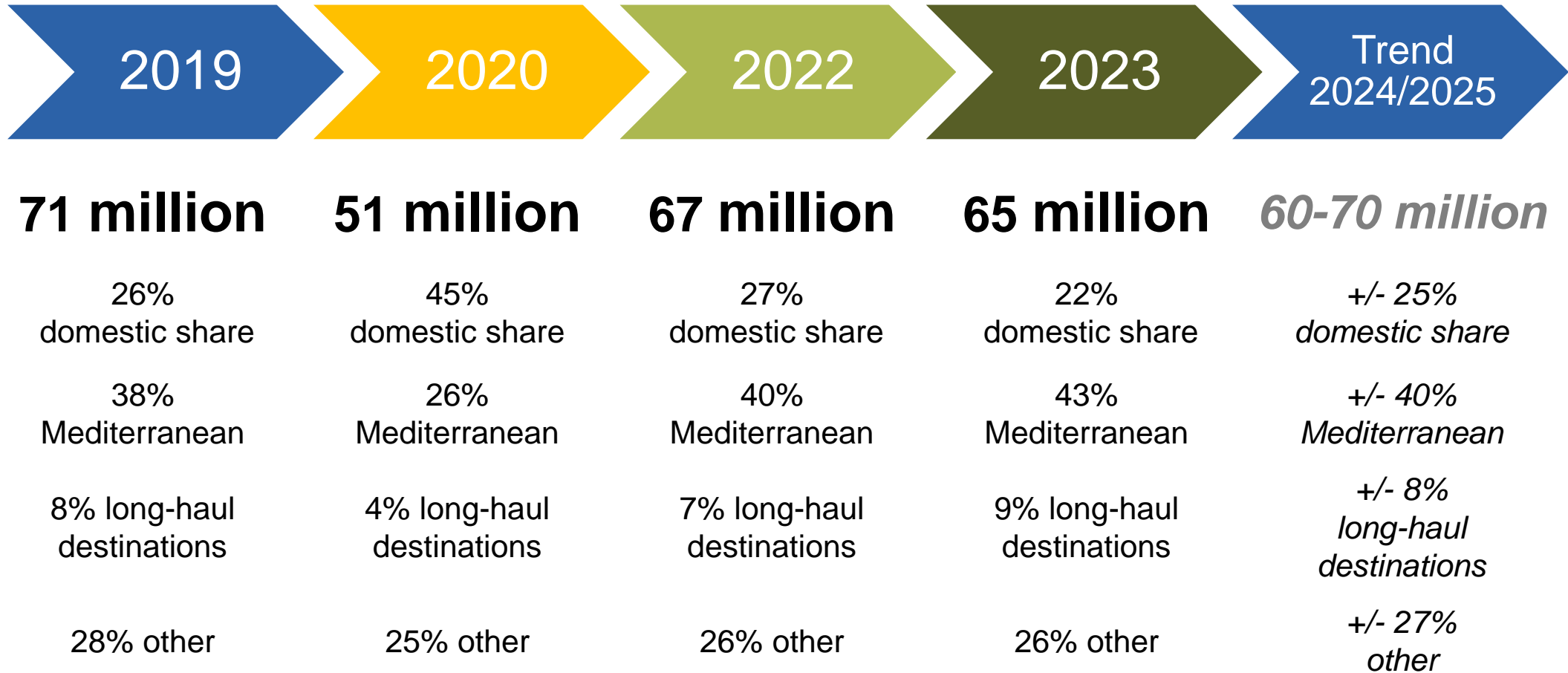
When it comes to holiday spending in 2024, 43% of people in Germany plan to spend the same amount as in the previous year. 36% do not yet know how their spending will develop. 15% plan to spend more and 7% less than in 2023.

These figures are at a similar level as one year ago, with a slight increase in "don't know yet" and a slight decrease in "same amount".

Savings options in consideration include looking for special offers, not travelling, choosing cheaper destinations and/or accommodation. If people are planning to spend more, this is due to increased holiday prices for most, but for some it is also because they want to travel more often, further and/or for longer.

CONCLUSION:

Trends in volume and destinations of holiday trips



Basis: German-speaking population, aged 14 and over, in Germany - holiday trips lasting 5 days or more
Source: RA 2024; RA Trend Study 2030; * Data for 2024 Estimation based on RA Trend Study 2030

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:

Module 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

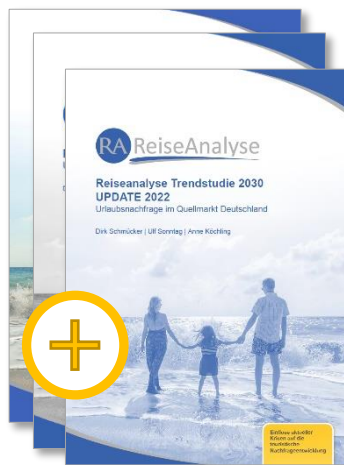
Holiday demand in the source market Germany

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.

Latest update in German only



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 2023: 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 2022.

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 2024 will be published in autumn 2024.



ISBN: 978-3-949752-02-5

97 pages, 103 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/