Welcome to the ITB Academy Webinar

The Germans on holiday – Trends from the study “Reiseanalyse 2015”
A warm welcome from Kiel!
Today is about …

- Volume of holiday demand
- Holiday destinations: Demand and interest
- Types of holiday: Demand and interest
- Holiday demand trends 2025
- Holiday planning and (mobile) internet
- Holiday motivation and effects
Source of our findings: Reiseanalyse 2015

**Reiseanalyse 2015 face-to-face**
field time: January 2015
7,720 personal interviews;
representative for the German-speaking population 14+ years in Germany

**Reiseanalyse online**
field time: May and November 2014
5,000 online interviews in total
representative for the German-speaking population 14-70 years in Germany

• Covering holiday trips 5+ days and short breaks 2-4 days …
• Regarding travel behaviour, holiday motivation, interests, attitudes …
• To be able to report quantitative aspects …
• And to be able to understand the who, how and why of holiday travel demand in Germany
Reiseanalyse characteristics

- Annually since 1972:
  - Vast data basis for analysing developments and trends
  - Extensive experience and methodological competence
- Non profit: Run by tourism industry association: FUR e.V.
- "Crowd-Sourced":
  30 institutions share the costs (around EUR 750,000 per year)
- "User-Generated Concept": User influence on RA developments
- Very flexible: Exclusive questions and Modules fit the survey to your needs
Martin Lohmann, Dirk Schmücker, Ulf Sonntag: *German Holiday Travel 2025: Development of holiday travel demand in the German source market. (The Reiseanalyse trend analysis).*

Edited by Forschungsgemeinschaft Urlaub und Reisen e.V. Kiel, 2014, ISBN 978-3-9816839-1-2), EUR 590,00 plus VAT

Demand for holiday trips on the German market: Volume
How many are going on holiday trips?

“Did you travel on holiday last year, i.e. in 2014, for 5 days or longer?”

German-speaking population aged 14 or over, RA 2015 face-to-face
How many are going on holiday trips?

Share of the population who travelled on holiday for five days or more at least once in the past 12 months.

- **Increase**
- **Stability**

2014: 77.4%

German-speaking population aged 14 or over (up to 1989: only West Germany, from 2010: incl. foreigners); RA 1970-2015, 1954-1969: various surveys
Holiday trips and short breaks 2014: Demand figures overview

Holiday trips (5 days and more)

<table>
<thead>
<tr>
<th>Year</th>
<th>Travellers</th>
<th>Holiday trips per person</th>
<th>Holiday trips</th>
<th>Expenditure p. p. and trip</th>
<th>Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>54.6 million</td>
<td>1.29</td>
<td>70.3 million</td>
<td>€ 958</td>
<td>€ 67.3 billion</td>
</tr>
</tbody>
</table>

Short breaks (2-4 days)

<table>
<thead>
<tr>
<th>Year</th>
<th>Short holiday travellers</th>
<th>Short trips per person</th>
<th>Short holiday trips</th>
<th>Expenditure p. p. and trip</th>
<th>Turnover</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>32.6 million</td>
<td>2.32</td>
<td>75.7 million</td>
<td>€ 261</td>
<td>€ 19.8 billion</td>
</tr>
</tbody>
</table>

Holiday trips (5+ days): German-speaking population 14+ years, January to December; Source: RA 2014 and 2015 face-to-face
Short holiday trips (2-4 days): German-speaking population 14-70 years, November to October; Source: RA online 5&11/2013 and 5&11/2014
Trend 2025: Volume key figures

**Holiday trips 2025:**
- 70 million
- Stable/ slightly declining
- No growth of holiday travel propensity
- Holiday travel frequency declining

**Short breaks 2025:**
- 88 million
- Certain potential for growth
- More trips per traveller
- More trips of 70+ year old travellers

Source: Martin Lohmann, Dirk Schmücker, Ulf Sonntag: *German Holiday Travel 2025: Development of holiday travel demand in the German source market. (The Reiseanalyse trend analysis).*
Trend 2025: Age structure of travellers

Volume of holiday trips

- 70+ years $\rightarrow$ +2,2 million trips
- 60-69 years $\rightarrow$ +4,1 million trips
- 14-59 years $\rightarrow$ -7,4 million trips

The market share of trips by 60+ years increases from now 30% to almost 40%.

Source: Martin Lohmann, Dirk Schmücker, Ulf Sonntag: German Holiday Travel 2025: Development of holiday travel demand in the German source market. (The Reiseanalyse trend analysis).
Holiday trips 2014: Destinations
Trend 2025: Holiday destinations domestic/abroad

Abroad 2025:
67% market share
46.6 million trips
(-2.6 million vs. 2013)

Domestic 2025:
33% market share
23.0 million trips
(+1.5 million vs. 2013)

Basis: Holiday trips (5+ days) of German-speaking population 14+ years
Source: RA 2015 face-to-face; German Holiday Travel 2025
Holiday destinations (regions) 1995-2014

* Please note: Alps = Alpine regions in Austria, France, Germany, Italy and Switzerland
Basis: Holiday trips (5+ days) of German-speaking population 14+ years;
1995, 2005 only Germans.
Holiday destinations 2014 – TOP 10 in detail

**Domestic**
- Meckl.-West P. 6.0%
- Bavaria 5.9%
- Schleswig-H. 4.2%
- Lower Saxony 4.0%
- Baden-W. 2.6%
- Berlin 1.4%
- Saxony 1.3%
- NRW 0.9%
- Hessen 0.8%
- Brandenburg 0.8%

**Abroad**
- Spain 13.5%
- Italy 7.8%
- Turkey 7.0%
- Austria 4.9%
- France 3.4%
- Croatia 3.3%
- Greece 2.9%
- Netherlands 2.3%
- Poland 1.9%
- USA 1.6%

Basis: Holiday trips (5+ days) of German-speaking population 14+ years
Source: RA 2015 face-to-face
Market shares of Greece and Egypt 2002-2014

Basis: Holiday trips (5+ days) of German population 14+ years
Source: RA 2003 - 2015 face-to-face
Destination interest next 3 years: Dynamics 2005-2015

<table>
<thead>
<tr>
<th>Region</th>
<th>Jan 15</th>
<th>Jan 05</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northwestern Europe</td>
<td>38</td>
<td></td>
</tr>
<tr>
<td>Eastern Europe</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>55</td>
<td></td>
</tr>
<tr>
<td>Alps</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td>European MED</td>
<td>58</td>
<td></td>
</tr>
<tr>
<td>Non-European MED</td>
<td>37</td>
<td></td>
</tr>
<tr>
<td>long-haul</td>
<td>30</td>
<td></td>
</tr>
</tbody>
</table>

Expressed total interest for holiday destinations in the next 3 years
German-speaking population of 14+ years
RA 2005 and RA 2015 face-to-face

18
Interest in holiday destinations North-western Europe

- **Denmark**: +63% in 18
- **Sweden**: +90% in 14
- **Norway**: +84% in 13
- **Great Britain**: +25% in 11
- **Ireland**: +50% in 10
- **Finland**: +108% in 8
- **Iceland**: +156% in 6

Expressed total interest for holiday destinations in the next 3 years
German-speaking population of 14+ years
RA 2004 and RA 2015 face-to-face
Interest in holiday destinations: the sub-national level

Expressed total interest for holiday destinations in the next 3 years
German-speaking population of 14+ years
RA 2015 face-to-face
ASIA on the German holiday market: Demand and Interest

ASIA* DEMAND:

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>1.6%</td>
</tr>
<tr>
<td>2014</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

* Asia = India, Pakistan, Nepal, Sri Lanka, Maldives, China, Korea, Japan, Southeast Asia (Thailand, Indonesia, Philippines, New-Guinea)

Basis: Holiday trips (5+ days) of the German-speaking population 14+ yrs. (until 2009 only Germans); Source: RA 2005-2015

ASIA* INTEREST:

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005-2007</td>
<td>7%</td>
</tr>
<tr>
<td>2015-2017</td>
<td>14%</td>
</tr>
</tbody>
</table>

Basis: German-speaking population 14+ yrs.; Source: RA 2015

INTEREST TO TRAVEL TO ASIAN COUNTRIES 2015-2017:

- Thailand: 13%
- China: 7%
- Japan: 7%
- Mongolia: 4%

Basis: German-speaking population 14+ yrs.; Source: RA 2015

* Asia = South Asia (India, Sri Lanka, Maldives etc.), Southeast Asia (Indonesia, Thailand etc.), East Asia (Japan, China, Korea etc.); Basis: German-speaking population 14+ yrs. (until 2009 only Germans); Source: RA 2005-2015
Types of holiday: actual demand and interest
# Types of holiday: Demand dynamics 2002-2014

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>2002-2014</th>
<th>Value 2014</th>
<th>Trend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beach/sun-bathing holiday</td>
<td></td>
<td>44</td>
<td>↑</td>
</tr>
<tr>
<td>Resting holiday</td>
<td></td>
<td>36</td>
<td>↓</td>
</tr>
<tr>
<td>Nature holiday</td>
<td></td>
<td>28</td>
<td>↑</td>
</tr>
<tr>
<td>Family holiday</td>
<td></td>
<td>27</td>
<td>↑</td>
</tr>
<tr>
<td>Adventure holiday</td>
<td></td>
<td>23</td>
<td>↓</td>
</tr>
<tr>
<td>Sightseeing holiday</td>
<td></td>
<td>16</td>
<td>↑</td>
</tr>
<tr>
<td>Active holiday</td>
<td></td>
<td>16</td>
<td>↑</td>
</tr>
<tr>
<td>Visiting relatives/friends</td>
<td></td>
<td>13</td>
<td>↓</td>
</tr>
<tr>
<td>Fun/Party holiday</td>
<td></td>
<td>12</td>
<td>↑</td>
</tr>
<tr>
<td>Circular tour</td>
<td></td>
<td>11</td>
<td>↑</td>
</tr>
<tr>
<td>Cultural trip</td>
<td></td>
<td>7</td>
<td>↑</td>
</tr>
<tr>
<td>Health holiday</td>
<td></td>
<td>5</td>
<td>↓</td>
</tr>
<tr>
<td>Study trip</td>
<td></td>
<td>3</td>
<td>↑</td>
</tr>
</tbody>
</table>

Holiday trips (5+ days), type of holiday travel (multiple answers) in %, sparklines without uniform scale, trend: linear regression 2002-2014, German population 14+ years (without German-speaking foreigners), Source: RA 2003-2015 face-to-face
Types of holiday: Interest dynamics 2005-2014

<table>
<thead>
<tr>
<th>Type of Holiday</th>
<th>Change Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>City break</td>
<td>+ 49%</td>
</tr>
<tr>
<td>Cruise</td>
<td>+ 27%</td>
</tr>
<tr>
<td>Fun+party holiday</td>
<td>+ 26%</td>
</tr>
<tr>
<td>Family vacation</td>
<td>+ 26%</td>
</tr>
<tr>
<td>Winter in the sun</td>
<td>+ 24%</td>
</tr>
<tr>
<td>Fitness holiday</td>
<td>- 34%</td>
</tr>
<tr>
<td>Health holiday</td>
<td>- 30%</td>
</tr>
<tr>
<td>Medical spa holiday</td>
<td>- 27%</td>
</tr>
<tr>
<td>Winter in the snow</td>
<td>- 8%</td>
</tr>
<tr>
<td>Holiday to relax</td>
<td>- 6%</td>
</tr>
</tbody>
</table>

Change rate total interest 2005 vs. 2015

Expressed total interest for types of holidays in the next 3 years
German-speaking population of 14+ years
RA 2005 and RA 2015 face-to-face
Holiday trips with total expenditure ≥ € 3,000 per person

Number of high-end holiday trips (million)

- 2014: 1.2
- 2004: 2.4

Share of all holiday trips (%)

- 2014: 1.8
- 2004: 3.4

Total travel expenditure for high-end travel (billion €)

- 2014: 5.5
- 2004: 9.5

Share of total travel expenditure (%)

- 2014: 10.4
- 2004: 14.1

Basis: Holiday trips (5+ days) of German-speaking population 14+ years
Source: RA 2005 and RA 2015 face-to-face
(Mobiles)
Internet und Urlaubsreisen
Internet access in total and use of mobile internet

German-speaking population aged 14 or over, RA 2000 - RA 2015 face-to-face
Trend 2025: Internet use and holiday planning

Used the internet within the last 12 month to gather information regarding holiday travel

Used the internet within the last 12 month to book holiday travel services

in %

<table>
<thead>
<tr>
<th>Year</th>
<th>Gather info</th>
<th>Book info</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>36%</td>
<td>14%</td>
</tr>
<tr>
<td>2010</td>
<td>39%</td>
<td>16%</td>
</tr>
<tr>
<td>2011</td>
<td>37%</td>
<td>17%</td>
</tr>
<tr>
<td>2012</td>
<td>45%</td>
<td>23%</td>
</tr>
<tr>
<td>2013</td>
<td>45%</td>
<td>24%</td>
</tr>
<tr>
<td>2014</td>
<td>47%</td>
<td>27%</td>
</tr>
<tr>
<td>2015</td>
<td>50%</td>
<td>29%</td>
</tr>
<tr>
<td>[...]</td>
<td></td>
<td>73%</td>
</tr>
<tr>
<td>2025</td>
<td></td>
<td>54%</td>
</tr>
</tbody>
</table>

German-speaking population aged 14 or over, RA 2009 - RA 2015 face-to-face; German Holiday Travel 2025
Trends 2025: Holiday booking channels

in %

<table>
<thead>
<tr>
<th>Year</th>
<th>Online: OTAs etc.</th>
<th>Online: Other</th>
<th>Offline: Travel agencies</th>
<th>Offline: Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>9</td>
<td>11</td>
<td>34</td>
<td>41</td>
</tr>
<tr>
<td>2008</td>
<td>11</td>
<td>11</td>
<td>35</td>
<td>39</td>
</tr>
<tr>
<td>2010</td>
<td>16</td>
<td>14</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>2012</td>
<td>19</td>
<td>15</td>
<td>30</td>
<td>29</td>
</tr>
<tr>
<td>2014</td>
<td>21</td>
<td>18</td>
<td>30</td>
<td>28</td>
</tr>
<tr>
<td>2025</td>
<td></td>
<td></td>
<td>39</td>
<td>14</td>
</tr>
</tbody>
</table>

Basis: Pre-booked holiday trips (5+ days) of German-speaking population 14+ years

Source: RA 2007 - 2015 face-to-face; German Holiday Travel 2025
Mobile internet use during holiday trips 2014: How many?

Basis: Main holiday trips 2014 (5+ days) of German-speaking population 14+ years, Source: RA 2015 face-to-face
Mobile internet use during holiday trips 2014: How?

- E-Mail: 84%
- Weather: 76%
- What's App etc.: 65%
- Navigation: 62%
- Destination information: 51%
- Facebook etc.: 49%
- News: 47%
- Schedules (plane, train): 35%
- Translator: 19%
- Accommodation information: 16%
- Ski, hike etc. information: 15%
- Transport booking: 15%
- Restaurant etc. reservation: 14%
- Accommodation booking: 10%
- Event/Skipass booking: 7%

Travellers who used the mobile internet during their trips for holiday information or booking; Source: RA online 11/2014
Holiday motivations, attitudes, effects
## Why we travel: Holiday motivations male/female

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Female (%)</th>
<th>Male (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distance from everyday life</td>
<td>67%</td>
<td>64%</td>
</tr>
<tr>
<td>Charging new energy</td>
<td>63%</td>
<td>58%</td>
</tr>
<tr>
<td>Time for one another</td>
<td>54%</td>
<td>51%</td>
</tr>
<tr>
<td>Being pampered, enjoying myself</td>
<td>51%</td>
<td>47%</td>
</tr>
<tr>
<td><strong>Diversity, experience a lot</strong></td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>Going places, travelling</td>
<td>37%</td>
<td>40%</td>
</tr>
<tr>
<td>Do something for my beauty</td>
<td>35%</td>
<td>29%</td>
</tr>
<tr>
<td>Cultural knowledge and education</td>
<td>28%</td>
<td>25%</td>
</tr>
<tr>
<td>Flirt, erotic adventures</td>
<td>11%</td>
<td>16%</td>
</tr>
<tr>
<td><strong>Sport activities</strong></td>
<td>6%</td>
<td>12%</td>
</tr>
</tbody>
</table>

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German-speaking population aged 14 or over, RA 2015 *face-to-face*
Attitudes concerning sustainable holiday travel

More information: [www.bmub.bund.de/N51279/](http://www.bmub.bund.de/N51279/)

„My holiday should be as ecologically compatible, ressource-efficient and environmentally friendly as possible.“

„My holiday should be as socially acceptable as possible.“

- Totally
- 2
- 3
- 4
- Not at all

German-speaking population aged 14 or over, RA 2015 face-to-face
How we return: Effects of holiday travel

Recuperation

I came back from this holiday trip recuperated.

75%

Health

This holiday trip had positive effects on my physical health.

47%

Happiness

I have experienced moments of genuine happiness during this holiday trip.

44%

Basis: Main holiday trips 2014 (5+ days) of German-speaking population 14+ years, Source: RA 2015 face-to-face
„Lessons learned“

► If you want to play on the German market it’s good to know what’s happening

► Good and up-to-date market data are important, …
  ► to not only know the status-quo, but also developments and trends.
  ► to be able to analyse your own segment en detail

► Market Volume: in total very stable and reliable; individually need for distraction

► Holiday destinations: Stability for the big players. Good chances e.g. for long-haul destinations and destinations in North-western Europe

► Types of holiday: sun&beach! In almost any case: Not too boring, not too exhausting

► Changes in holiday planning
Tourism demand in 2025: The customers

- Fewer
- Older
- More diverse
- Also with child(ren)
- Always online
- Motivated and interested
- Multi-optional
- Diversity wanted
- More competent

Source:
Martin Lohmann, Dirk Schmücker, Ulf Sonntag: *German holiday travel 2025*: Development of holiday travel demand in the German source market (The Reiseanalyse trend analysis)
This was only a small glimpse! Looking for more?

- www.reiseanalyse.de
- **Publication I:**
  German Holiday Travel 2025 (Reiseanalyse Trend Analysis)
- **Publication II:**
  RA 2014 English Summary
- Trend presentations and workshops
- **Reiseanalyse 2015/2016:**
  The whole deal 😊
Thank you very much!
Questions?
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