ReiseAnalyse 2016

Selected first results

of the 46th Reiseanalyse for ITB 2016

52 % of the population in Germany consider it very important to spend time with their partners and families while on holidays

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RA ReiseAnalyse 2016

The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the Reiseanalyse 2016.

The annually conducted 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.

The Germans are in the mood for holidays

Stable demand volume for 2016 expected

At the beginning of 2016, most people in Germany are already in holiday mood: 59 % have concrete travel plans (2015: 58 %), only 12 % are certain that they will not go on holiday (2015: 11 %).

That does not mean, though, that the Germans turn a blind eye on the global political situation and its ramifications. This becomes apparent in the distinctly bleaker prospect on the general economic development in Germany than only one year ago. Nonetheless, those figures are still far away from the low point of our recordings in 2009.

*Trend to 2025**

Number of holiday trips is stable

Growing number of short trips

Increasing expenditure

*more information on page 7

For the realisation of travel plans, however, the assessment of the individual's economic situation and its future development is more important than the evaluation of the general situation. Regarding this, 71 % of the population do not expect any change (2015: 72 %), 15 % believe in an improvement (2015:18 %) and 14 % expect a change for the worse (2015: 10 %).

Against this background we assume a solid demand for holidays in 2016. Certain shifts with regards to travel destinations, types of holidays or later bookings are of course possible.

Holiday trip propensity 2015: 77%

€ 87 billion total expenditure for holiday and short holiday trips

Holiday and short holiday trips 2015:
Demand figures*

Holiday trips (5 days and more)

Year	Travellers	Holiday trips per person	Holiday trips	Expenditure p.p. and trip	Turnover
2015	53.4 m	1.29	69.1 m	€ 954	€ 65.9 b

Short holiday trips (2-4 days)

Year	Short holiday travellers	Short trips per person	Short holiday trips	Expenditure p.p. and trip	Turnover
2015	31.7 m	2.43	77.1 m	€ 274	€ 21.1 b

*in comparison with earlier editions of the Reiseanalyse, notice the updated basis for the projections (see box on p. 3)

Basis: Holiday trips (5+ days): German-speaking population 14+ years, January to December; Source: RA 2016 *face-to-face;*
Basis: Short holiday trips (2-4 days): German-speaking population 14-70 years, November to October; Source: RA *online* 11/2015

A glance at the past year shows: 2015 was again a very good year in terms of travelling. Key figures remain quite stable and at a high level: 53.4 million holiday travellers took a total of 69.1 million holiday trips. The holiday travel propensity equalled more than 77 %. That is the proportion of the population who have undertaken at least one holiday trip of at least 5 days in one year. Expenditure on holiday trips amounted to € 65.9 billion.

In addition, 31.7 million short holiday travellers undertook 77.1 million short trips with a total expenditure of € 21.1 billion, recording a slight increase in both the amount and the expenditure of short trips.

The selected first results presented here have been checked, but we cannot rule out any variations in the final data.

Text: Ulf Sonntag, Rolf Schrader, Martin Lohmann

Holiday destinations: Long-haul and Western Mediterranean on the rise

Just like in previous years, the golden rule also applies in 2015: Around one third of holiday trips are domestic, one third go to the Mediterranean and the rest of the world accounts for the last third. In 2015, destinations in the European Mediterranean as well as long-haul destinations were able to expand their market share.

With a market share of 29 %, Germany was once again the most popular holiday destination in 2015. Within Germany there is a strong competition relating to holiday trips (5 days and more) between Bavaria and Mecklenburg-West Pomerania for first place and between Schleswig-Holstein and Lower Saxony for third place. In 2015, Bavaria and Lower Saxony managed to decide the race in their favour.

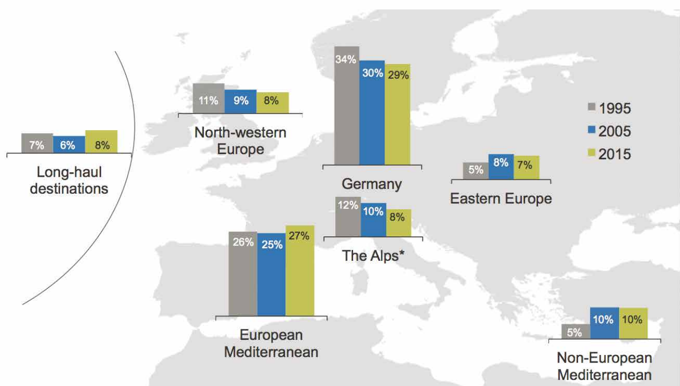
In terms of destinations abroad, Spain is still the uncontested "top dog" with a current market share of more than 13 %, ahead of Italy and Turkey. Austria is in fourth place. For the first time Croatia and Greece managed to pull ahead of France with a paper-thin lead.

Germany remains the most popular holiday destination: Holidays on the coast or in the South are preferred.

Abroad, Spain is well ahead of Italy, Turkey and Austria.

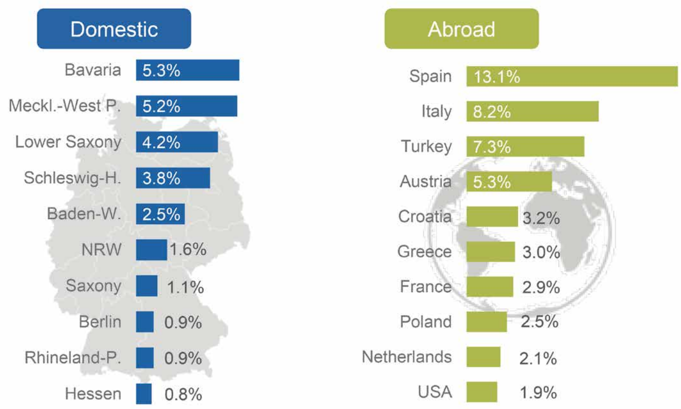
Long-term stable market share for the main destinations

Regional distribution of holiday trips



* 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.
Source: RA 1996, RA 2006, RA 2016 *face-to-face*

Holiday destinations 2015 – TOP 10 in detail



Basis: Holiday trips (5+ days) of German-speaking population 14+ years.
Source: RA 2016 *face-to-face*

Updated Basis for the projection of the findings is the data from the Census 2011 that can be used in market research since mid-2015. This leads to i.e. a decrease of the total volume of the resident population aged 14 and older in Germany (RA2016: 69.2 million, RA2015 and earlier: 70.5 million) and slight shifts in the structures.
Earlier published volume figures (e. g. number of holiday trips) are therefore not directly comparable to those of the RA2016. Overall, however, the implications are marginal.

This data is based on holiday trips (5+ days) of the German-speaking population aged 14 years and above. Business trips and trips of less than 5 days are not included. This has to be taken into consideration when comparing data to e. g. official statistics which usually use different definition criteria.

Holiday travel behaviour: Air travel with record market share

Means of transport: car most important, air travel gaining market share

The ranking of means of transport has been unchanged since the beginning of the 1990's: car ahead of aircraft, bus and train. Since then, travelling by aircraft has increased its market share at the cost of the other three. With regard to holiday accommodation, the hotel clearly dominates over holiday apartments and homes. Holiday spending as well as travel duration remained stable compared to the previous year.

Accommodation: Hotels dominate overall. In Germany, holiday apartments and -houses are most popular.

Stability in travel expenditure and duration

Holiday travel behaviour

		2000	2014	2015	2015	
		total	total	total	domestic	abroad
	Basis: Holiday trips 5+ days = 100%	*62.2 m*	*70.3 m*	*69.1 m*	*20.0 m*	*49.1 m*
Means of transport	Car/mobile home	49%	46%	**45%**	*76%*	*32%*
	Aircraft	37%	39%	**40%**	*1%*	*56%*
	Bus	9%	8%	**7%**	*8%*	*7%*
	Train	6%	5%	**5%**	*13%*	*2%*
Accom-modation	Hotel/guesthouse	47%	48%	**48%**	*28%*	*56%*
	Holiday apartment/home	24%	24%	**23%**	*36%*	*19%*
	Camping	6%	6%	**6%**	*8%*	*5%*
Travel expenditure total per person per trip (Average in EUR)		792	958	**954**	*557*	*1.115*
Average **Travel duration** in days		13,8	12,5	**12,6**	*10,3*	*13,5*

Basis: Holiday trips (5+ days) of German-speaking population 14+ years , 2000 only Germans
Source: RA 2001, RA 2015, RA 2016 *face-to-face*

Types of holiday: Variety, but not too strenuous, please!

Most important type of holiday: beach/sunbathing holiday

The most popular type of holiday 2015 was the beach/sunbathing holiday, followed by resting and nature holidays. On the whole, the long-term trends prove true: bathing, family and sightseeing are further on the rise, while resting and health are losing market share again. It can generally be said that today's multi-optional customer rather likes to mix different types of holiday, as long as they are not too monotonous or too strenuous. Consequently, types of holiday that fit into this scheme are on a growth path.

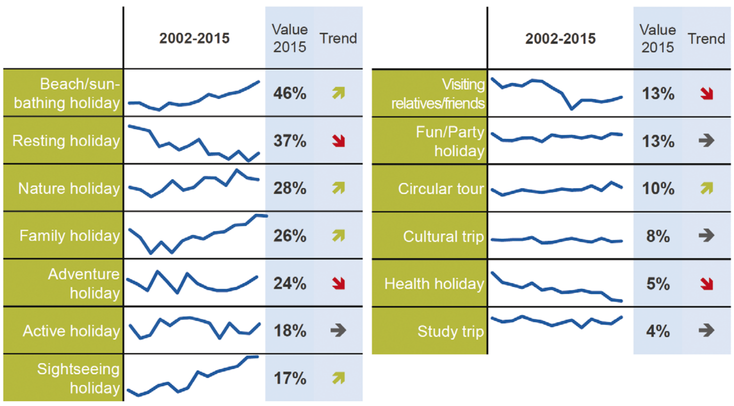
Tendency: Bathing, family and sightseeing on the rise, resting and health on the decline

*Trend to 2025**

Types of holiday that can be mixed and are not too one-dimensional have the biggest growth potential.

*more information on page 7

Types of holiday: Trends



	2002-2015	Value 2015	Trend
Beach/sunbathing holiday		46%	↗
Resting holiday		37%	↘
Nature holiday		28%	↗
Family holiday		26%	↗
Adventure holiday		24%	↘
Active holiday		18%	→
Sightseeing holiday		17%	↗
Visiting relatives/friends		13%	↘
Fun/Party holiday		13%	→
Circular tour		10%	↗
Cultural trip		8%	→
Health holiday		5%	↘
Study trip		4%	→

Holiday trips (5+ days), type of holiday travel (multiple answers) in %, sparklines without uniform scale, trend: linear regression 2002-2015, German population 14+ years (without German-speaking foreigners),
Source: RA 2003-2016 *face-to-face*

Travel organisation and booking: Internet driving change

Currently, the package holiday remains the most important form of holiday organisation, and the personal conversation, especially in travel agencies, the most important booking channel. However, a structural change in favour of single bookings, accommodation providers and internet portals is underway. The main driver behind this trend is the continuously growing number of online bookings, up from 11 % of all pre-booked holiday trips in 2005 to 36 % in 2015. It is expected that even before 2020 the majority of all holiday trips will be booked online.

Long-term structural change

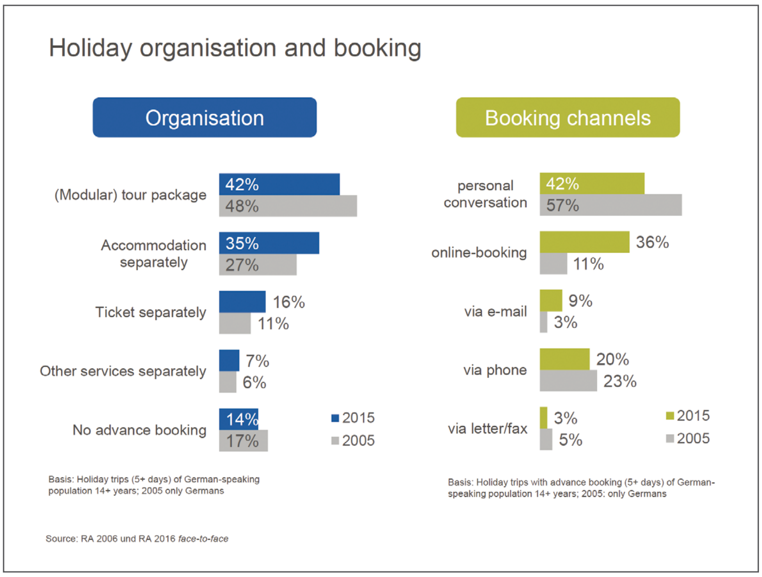
Increasing: Accommodation providers and internet portals

Decreasing: Travel agencies and package holidays

*Trend to 2025**

Even before 2020 the majority of all holiday trips will be booked online.

*more information on page 7



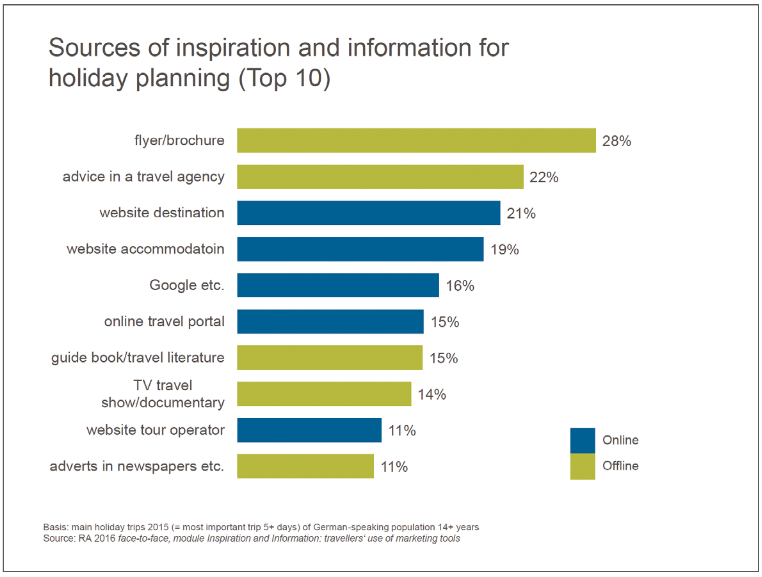
Sources of inspiration and information for travellers

For inspiration and information in holiday planning, most travellers use several different sources illustrating the touristic offers. The most prominent sources are flyers and brochures, the advice in a travel agency as well as the websites of destinations and accommodations. Generally, frequently used sources are assessed as trustworthy. If a source is perceived as being annoying on the other hand, customers tend to avoid it.

Customers use various sources for inspiration and information.

Trustworthy sources are preferred. Customers try to avoid annoying sources of information.

More information on this topic in the module "Inspiration and Information: travellers' use of marketing tools"



Interest in destinations: Eastern Mediterranean and Northern Africa

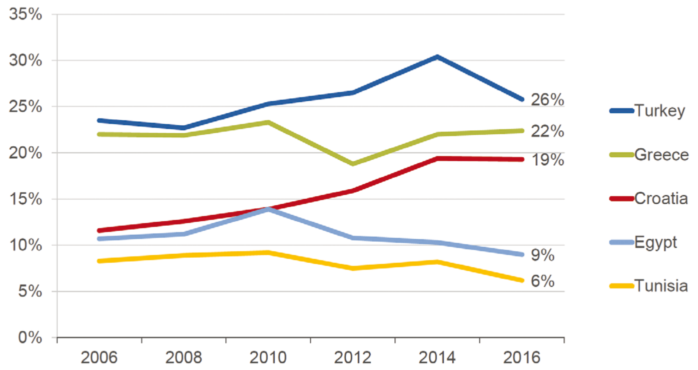
General interest to travel to Turkey remains on a high level.

Crises and unrest result in a decrease in expressed interest.

However the affected countries do not disappear from the touristic map.

In January 2016, 26 % of the population in Germany are generally interested in spending a holiday in Turkey in the next 3 years; 22 % toy with the idea of travelling to Greece, 19 % to Croatia. 9% are interested in Egypt as a holiday destination, 6 % in Tunisia. The development of interest for those countries shows that news reports about crises and unrest are a damper on potential demand. However, none of the destinations disappears completely from the touristic map. If negative headlines about a destination recede, the actual demand can generally recover fairly quickly.

Interest in travel destinations in the next 3 years: Eastern Mediterranean and Northern Africa



Figures for „almost definitely planning“ and „generally considering“ as a holiday destination in the next 3 years.

Basis: German-speaking population 14+ years; up to 2010 only Germans
source: RA 2006-2016 *face-to-face*

Migrants are interested in a variety of holiday destinations

German-speaking foreign nationals in Germany are even fonder of travelling than the Germans.

9 % market share of German-speaking foreigners of all holiday trips.

With a holiday travel propensity of 87 %, the German-speaking foreign nationals in Germany are even fonder of travelling than the Germans themselves. Their 6 million holiday trips stand for a market share of 9 % of all holiday trips. The example of the population with Turkish and Polish background shows: even though they are drawn to Turkey and Poland in the first place, there are definitely other appealing destinations for them as well, with Germany leading the way.

Interest in holiday destinations by German-speaking „migrants“ from Turkey and Poland

nationality/ migration background			
Turkey	Turkey	*92%*	46% of the population in Germany with a Turkish background are interested in a holiday in Germany in the next 3 years
	Germany	*46%*	
	Spain	*20%*	
	Italy	*17%*	
	Austria	*12%*	
	France	*10%*	
Poland	Poland	*65%*	42% of the population in Germany with a Polish background are interested in a holiday in Spain in the next 3 years
	Germany	*54%*	
	Spain	*42%*	
	Turkey	*29%*	
	Italy	*24%*	
	Austria	*23%*	

Basis: German-speaking people 14+ years in Germany with nationality/migration background Turkey/Poland
source: RA 2016 *face-to-face*

You can find more information in our publications: Summary of Reiseanalyse 2015 and 2016

With the summary of the Reiseanalyse 2015 we provide you the opportunity to acquire a detailed abstract of the essential results of the Reiseanalyse.

In addition to selected results, time series and comparisons with previous years concerning holiday trips of five days and more, you also get analyses about short holiday trips. Selected results from the modules “online en-route”, “holiday mobility” and “health-oriented holidays” are also presented, as well as the Sinus-Milieus.

Detailed summary of travel behaviour

Important comparisons of time series

Selected insights into the module results and the Sinus-Milieus

The summary of the RA 2015 is available as a softcover version for € 290 (excl. VAT) in German and English. The publication contains approximately 100 pages.

The summary of the RA 2016 will be published in Autumn 2016.

For more information visit www.reiseanalyse.de, or order directly via e-mail: info@reiseanalyse.de or via phone: +49 431 888 88 00.

German Holiday Travel 2025

The RA Trend Analysis “German Holiday Travel 2025: development of holiday travel demand in the German source market” by the authors Martin Lohmann, Dirk Schmücker and Ulf Sonntag provides estimates of holiday travel behaviour in 2025. These trends are based on long time series data from the Reiseanalyse since the 1970’s and supplemented by a framework and supply side analysis. In addition to the general trends, four single market segments (holiday trips with children, beach holidays, health holidays and summer holiday in the Alps) are analysed in more detail.

Reiseanalyse Trend Analysis on holiday travel behavior of the German market in 2025

Framework analysis, Supply side analysis, long time series data on holiday travel demand as a sound basis for trend spotting

The Trend Analysis can be purchased as a softcover version for € 590 (excl. VAT) in German and English. It contains 160 pages/113 figures and tables.

For more information visit www.reiseanalyse.de, or order directly via e-mail: info@reiseanalyse.de or via phone: +49 431 888 88 00.

RA ReiseAnalyse 2016

RA 2016 Highlights:
- Trend detection with time series data
- Individual analyses with CNTlight
- Exciting modules
- Sinus-Milieus

The full use of our data: Participation in the Reiseanalyse 2016

The Reiseanalyse 2016 examines the German holiday travel behaviour, like every year since 1970. It offers reliable, high quality and up-to-date data for the tourism industry to use in their strategic planning, market analyses and marketing activities.

The main focus is on user friendliness and individual processing of the results. The possibilities for individual analyses and benchmarks are manifold and straightforward. Through the participation of over 25 partners in the Reiseanalyse 2016, the costs are shared between all participants. The modular concept ensures a comparatively low entry level price while every customer only pays their required services.

RA face-to-face survey
Representative for the 69.2 million German-speaking people aged 14 years and above, living in private households in Germany (sampling method: random route). In January 2016, more than 7,500 people were interviewed personally in their homes about holiday-related aspects.

RA online
Representative for the 58.1 million German-speaking people aged 14 to 70 years, living in private households in Germany (sampling method: online access panel). Online surveys in May and November 2015 with 5,000 respondents. Topics focus on online-relevant questions as well as short breaks and city breaks.

Who is behind the Reiseanalyse?

The RA is carried out by the FUR (Forschungsgemeinschaft Urlaub und Reisen e.V.). The FUR is neither a market research institute nor a management consultancy. Rather, it is an independent association of domestic and international users of tourism research in Germany and a non-profit organisation commissioning tourism research projects. In accordance with the statutes, FUR does not make any profit, but completely re-invests any surpluses into research work.

The FUR (Rolf Schrader) together with the NIT (Institute for Tourism Research in Northern Europe: Prof. Dr. Martin Lohmann, Ulf Sonntag) are in charge of the organisational and scientific aspects of the survey. Ipsos (Doni Boll, Hans-Peter Drews) carries out the field work and is responsible for the data processing. This team has been working together on the Reiseanalyse for 20 years now.

What does the Reiseanalyse cost?

Basic participation RA 2016

Results of the standard question programme - Report volume with interpretations, method volume, individual tabulations, evaluation seminar, right to additional analyses

Price € 9,900

The basic participation is a precondition for purchasing further parts of the RA (e.g. modules, exclusive questions, data bases)

All prices excl. VAT.

Modules of the RA 2016

- ► Inspiration and information: travellers' use of marketing tools € 5,500
- ► Outdoor holidays: product requirements for activity holidays outdoors € 5,500
- ► Image and uniqueness of holiday destinations € 5,500

Exclusive questions

Individual questions are possible in all our surveys. Please contact us; we will be pleased to help you.

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Users of the Reiseanalyse (selection)

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VIR

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DMOs international:
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