RA ReiseAnalyse

2018

Selected first results

of the 48th Reiseanalyse for ITB 2018

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The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the Reiseanalyse 2018 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.

A bright outlook for the 2018 travel year

2017 was a very good year for the travel industry and the outlook for 2018 is excellent.

Germany is in the mood for holidays. In January this year, almost 70 % of people in Germany already had definite or provisional plans to go on holiday in 2018. Only 11 % were certain that they would not go on a holiday trip in 2018.

A clear upward trend was also evident in holiday travel spending, with the number of people intending to spend more on holidays in 2018 (30 %) compared with the previous year significantly higher than that of people who wanted to save on holidays (13 %).

These developments are reflected in the latest measurements for 2017. Spending on holiday trips (€ 73.4 billion compared with € 67.5 billion in 2016) and short breaks (€ 23.0 billion compared with € 20.4 billion in 2016) has never been higher than last year. For the first time, the total volume of spending on holiday trips and short breaks far exceeded € 90 billion.

At 77 %, holiday travel propensity was stable at a very high level. This indicator reflects the proportion of the population who went on at least one holiday of 5 days or more in 2017. The number of holidays increased slightly to almost 70 million.

Holiday travel propensity 2017: 77 %

With regard to short breaks, a positive development was recorded, with 34.3 million people travelling on a total of 82.1 million short breaks in 2017.

€96 billion total spending on holiday trips and short breaks.

Holiday trips and short breaks in 2017
Key figures

Holiday trips (5+ days)

Year	Travellers	Holiday travel frequency	Holiday trips in total	Spending p.p. and trip	Total spending on holiday trips
2017	**54.1m**	**1.29**	**69.6m**	**€1,054**	**€73.4bn**
2016	53.4m	1.29	68.7m	€983	€67.5bn

Short breaks (2-4 days)

Year	People on short breaks	Short break frequency	Short breaks in total	Spending p.p. and short break	Total spending on short breaks
2017	**34.3m**	**2.39**	**82.1m**	**€268**	**€23.0bn**
2016	33.0m	2.44	80.5m	€253	€20.4bn

p.p.: per person
Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over, Jan. to Dec., source: RA 2017-2018 *face-to-face*
Basis: short breaks (2-4 days) of the German-speaking population aged 14-70 years, Nov. to Oct., source: RA 2017-2018 *online*

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

Text: Ulf Sonntag, Philipp Wagner, Rolf Schrader, Martin Lohmann

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A record-breaking 50 million holidays abroad in 2017

More international and long-haul trips than ever before.

More Germans than ever before wanted to travel to destinations abroad. A new record 72 % of all holiday trips in 2017 were abroad. Long-haul trips to destinations outside Europe and the Mediterranean accounted for 8 % of all holidays – another record figure.

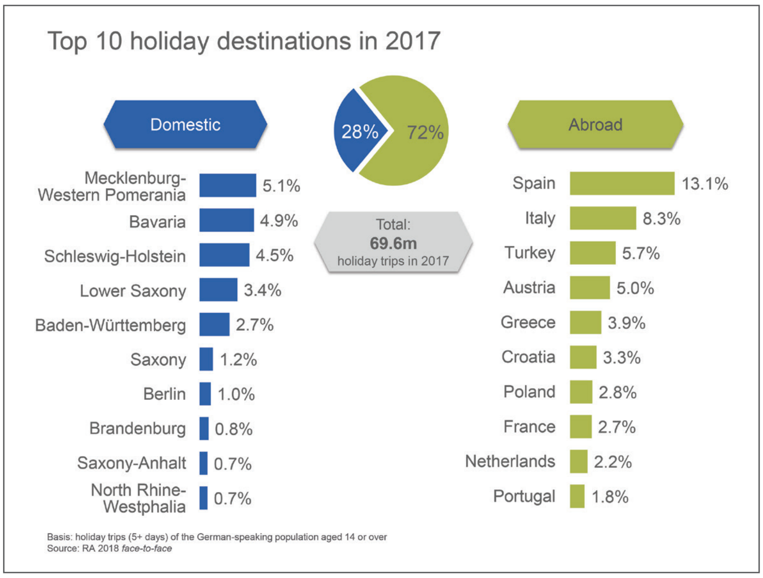
Germany is the most popular destination among Germans, followed by Spain and Italy.

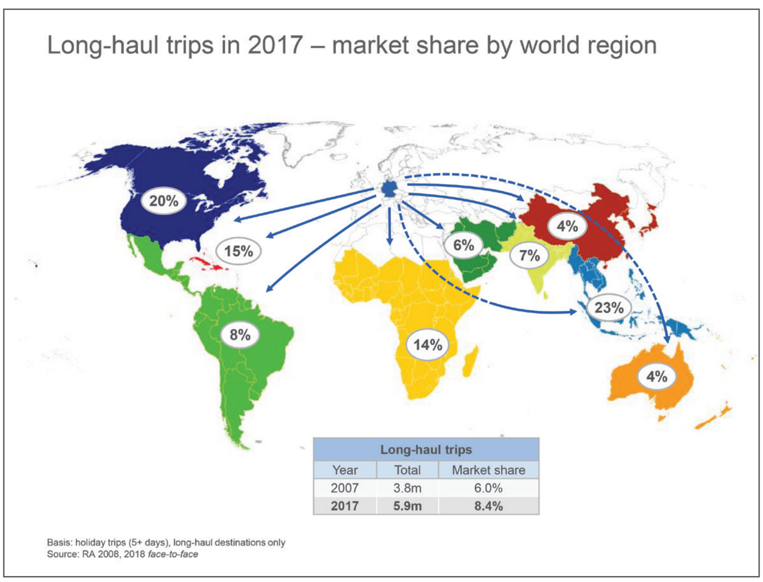
Nevertheless, at 28 % of all holidays, Germany remained the most important destination for Germans. The ranking of the most popular international destinations was stable. Spain was the undisputed leader, followed by Italy, Turkey and Austria. Among the top 10 destinations abroad, Austria, Greece, Croatia, Poland and Portugal recorded gains over 2016.

Travel destination rankings for Germany and abroad remain largely steady.

Even for destinations which lost market share last year, there was some good news. In North Africa, a turnaround has already been achieved and demand picked up noticeably in 2017. Demand for holidays in Turkey stabilised at the previous year's level.

Long-haul destinations in South-East Asia and southern Africa are currently trending, with market shares growing.





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.

RA ReiseAnalyse 2018

Holiday travel behaviour – flights and hotels on the rise

Means of transport – cars top the leader board, followed by air travel.

Accommodation – hotels are the winners. In the domestic market, holiday apartments and homes are the most popular.

Strong growth in holiday spending abroad.

Travel duration at a steady level.

The strong performance of international destinations is consistent with travel behaviour trends. Air travel and hotels are on the upswing.

With travel duration at a steady level, significantly higher average spending per person and holiday was recorded. The increase of more than € 70 was mainly due to higher spending on travel abroad.

Holiday travel behaviour in 2017

	Basis: holiday trips 5+ days = 100%	2010 *Total 69.5m*	2016 *Total 68.7m*	2017 *Total 69.6m*	2017 *Domestic 19.2m*	2017 *Abroad 50.4m*
Means of transport	Car/motorhome	48%	47%	46%	76%	34%
	Plane	37%	39%	40%	1%	55%
	Coach	8%	6%	7%	8%	6%
	Train	5%	6%	5%	14%	2%
Accom-modation	Hotel/motel/guesthouse	47%	46%	48%	28%	55%
	Holiday apartment/home	24%	26%	25%	36%	21%
	Camping	6%	6%	6%	8%	6%
Average **holiday spending** per person and trip		€845	€983	€1,054	€611	€1,222
Average **travel duration** in days		12.8	12.6	12.6	10.1	13.5

Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over
Source: RA 2011, 2017, 2018 *face-to-face*

Holiday organisation and booking – Internet is driving the change

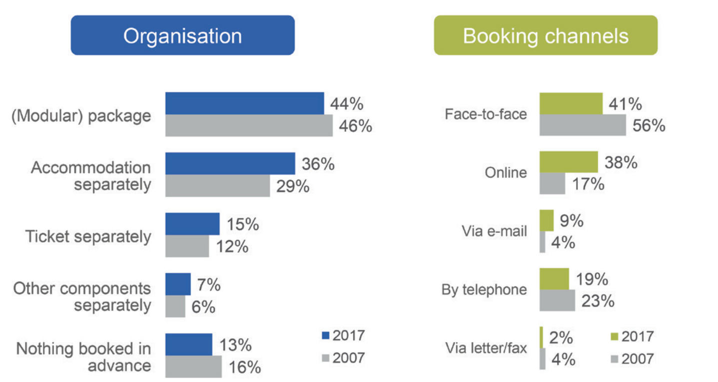
Long-term structural change.

Booking channels – more online, less face-to-face.

Organisation – more individual bookings with only a slight decline in package tours.

Package holidays currently remain the most important form of holiday organisation and face-to-face conversations, especially in travel agencies, the most important booking channel. However, a structural change in favour of individual bookings, accommodation providers and online portals has been observed for years. The driving force behind this development is a continuous increase in online bookings, which were up from 17 % of all pre-booked holidays in 2007 to 38 % in 2017. It is to be expected that the majority of all holiday bookings will be generated online by 2020.

Holiday organisation and booking in 2007 and 2017



Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over, 2007: Germans only

Basis: holiday trips with advance booking (5+ days) of the German-speaking population aged 14 or over, 2007: Germans only

Source: RA 2008, 2018 *face-to-face*

Inspiration & information – holiday-makers mix different sources

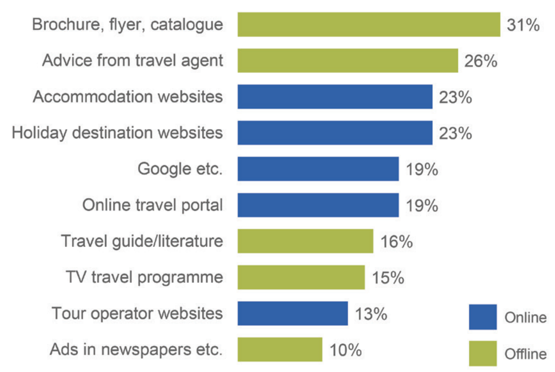
Most holiday-makers use several sources regarding the available tourist offering for inspiration and information when planning their holidays. Similar to the last measurement two years earlier, in 2017, brochures, flyers and catalogues, advice from travel agents and accommodation and destination websites were the most important sources. Age-specific differences were evident in the sources used. Offline sources tended to be favoured by older holiday-makers and online sources by younger holiday-makers.

On average, 2.5 different sources are used for holiday inspiration and information.

Online and offline sources are important. The ranking has not changed since 2015.

More information is provided in the module "Inspiration and information: Touchpoints during the customer journey".

Top 10 sources of inspiration & information for holiday planning



Basis: main holiday trip in 2017 (= most important holiday trip of 5+ days) of the German-speaking population aged 14 or over
Source: RA 2018 *face-to-face, Inspiration and Information module*

Price & quality – preferably cheap and good

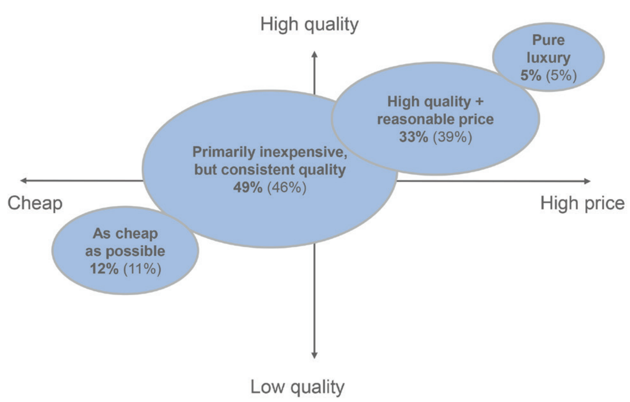
Price and quality are important points of reference in the holiday decision process. For the vast majority of holidays in 2017, Germans had both aspects firmly in mind. For a total of 49 % of respondents, the focus was on price, but quality was also expected. For 38% of respondents, quality was more important than price. In general, the importance of price has slightly increased compared with 2008.

Holiday-makers from Germany pay particular attention to price and quality when travelling.

The importance of price has increased compared with 2008.

More information is provided in the module "Price and quality of holiday trips".

Importance of price & quality for holiday trips in 2017



Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over, benchmark = 2008 in brackets (Germans only)
Source: RA 2009, 2018 *face-to-face*

Destination experiences in 2017 – what people like to remember

Good weather and scenery are top priorities.

Regional food and beverages play an important role.

Many want to “feel” the atmosphere and immerse themselves in local life.

More information is provided in the module “Destination experience: What is important to holiday-makers?”

For a holiday to be perfect, experiences at the destination must be memorable. At the top of this list were good weather and nice scenery/views. The high priority given to regional food and typical restaurants shows that one way to guests’ hearts is through their stomachs. Another focus was on “direct” contact with the destination by experiencing the atmosphere, getting immersed in local life and interacting with local people.

Destination experiences in 2017 – good memories

Basis: main holiday trip in 2017 (= most important holiday trip of 5+ days) of the German-speaking population aged 14 or over, selection of destination experiences
Source: RA 2018 *face-to-face, Destination Experiences module*

Holiday preferences – how much tourism is too much?

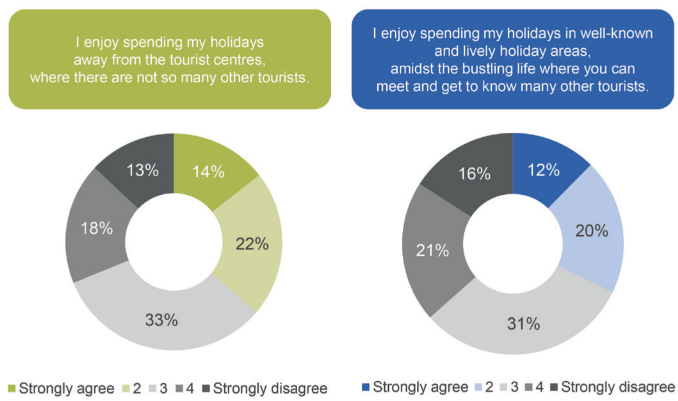
Overtourism from the customer’s point of view.

1/3 of travellers love the hustle and bustle at their destination.

Another 1/3 prefer destinations without many other tourists.

Many destinations are packed with tourists and overcrowded during peak season. German holiday-makers are divided when it comes to how many other tourists they like to meet at their holiday destination. A total of 36 % stated that they prefer a holiday away from the tourist centres while 32 % preferred the bustling life of popular holiday destinations. Unsurprisingly, older holiday-makers like things quieter. Younger holiday-makers prefer the hustle and bustle of busy resorts.

Holiday preferences – overtourism from the customer’s point of view



Basis: German-speaking population aged 14 or over
Source: RA 2018 *face-to-face*

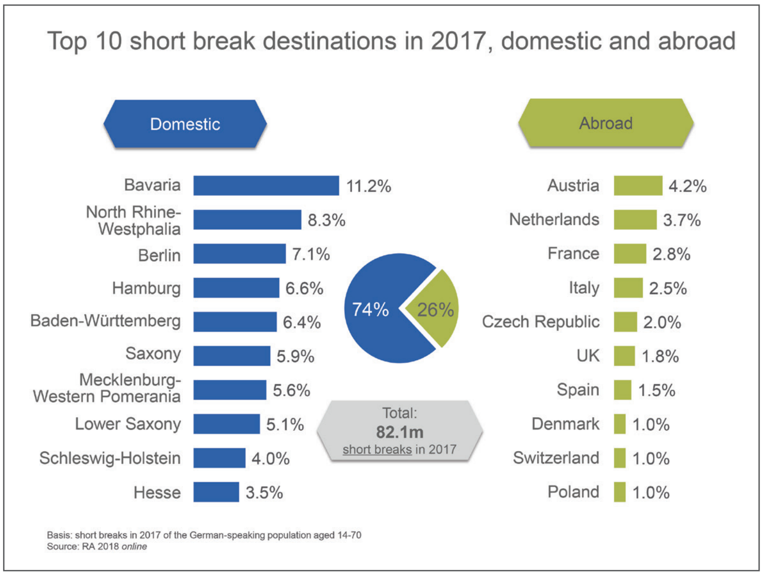
Short breaks – boom in city destinations

Of the total 82.1 million short breaks in 2017, 74 % were spent within Germany. Bavaria and North Rhine-Westphalia were the most popular domestic destinations, while Austria and the Netherlands were the most popular abroad. City breaks were the dominant type of travel and hotels the preferred accommodation. Big metropolitan areas were the most popular destinations for city breaks. They also benefited the most from increasing demand. In Germany, Berlin and Hamburg took the lead, followed by Munich, Cologne and Dresden. Abroad, Paris was the most popular destination, ahead of Vienna, Amsterdam and London.

74% of short breaks are domestic trips.

City breaks are the most popular, and hotels are the first choice for accommodation.

Among city destinations, metropolitan areas dominate.



Read more in our "Summary of the Reiseanalyse"

The summary of the Reiseanalyse provides a detailed report of key results of the Reiseanalyse.

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 2017 is available in a softback version for € 290 (excl. VAT), in German and English language versions. The publication comprises approximately 100 pages.

The summary of the Reiseanalyse 2018 will be published in autumn 2018.

Detailed summary of German travel behaviour.

Key data in time series.

Selected insights into module results and Sinus-Milieus®.

RA ReiseAnalyse 2018

> *With your participation in the RA 2018 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 2018

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	**Individual components & evaluations**	**Raw data & software**
€ 5.500		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 RA is carried out by the FUR (Forschungsgemeinschaft Urlaub und Reisen e.V.), an independent association and the biggest non-profit organisation commissioning tourism research in Germany. The FUR does not make any profit. All surpluses are reinvested in full into research and the further development of the survey. The FUR publishes selected results for a wider audience (e.g. German Holiday Trends 2025).
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.

bit.ly/RA2018-leaflet

Info folder RA 2018

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