RA ReiseAnalyse 2020

Selected first results

of the 50th Reiseanalyse for the ITB 2020

50 years ReiseAnalyse 1970 – 2020

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The Forschungsgemeinschaft Urlaub und Reisen e.V. (FUR) is pleased to present selected first results of the Reiseanalyse 2020 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.

Up, up and away – the Germans are in travel mood

Good prospects for 2020

Plans for holiday travel in 2020: Positive!

Personal economic outlook: Stable

Germany is in the mood for holidays. In January this year, 72% of the people in Germany already had definite or provisional plans to go on holiday in 2020 (2019: 71%). Only 11% were certain that they would not go on a holiday trip in 2020 (2019: 11%).

This means that from the travellers' perspective, the prospects for the year 2020 are very positive. This trend is confirmed by important general indicators: When assessing the development of their own economic situation, 72% assume that it will remain the same, 17% expect it to improve and 11% expect it to deteriorate.

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

Holiday trips (5+ days): 71 million

Short breaks (2 to 4 days): 88 million

Holiday travel expenditure 2019 on record high

Holiday trips and short breaks in 2019
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
2019	**55.2 million**	**1.28**	**70.8 million**	**€ 1,033**	**€ 73.1 billion**
2018	55.0 million	1.27	70.1 million	€ 1,017	€ 71.2 billion

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
2019	**35.8 million**	**2.45**	**87.6 million**	**€ 271**	**€ 23.7 billion**
2018	35.4 million	2.49	88.0 million	€ 268	€ 23.6 billion

p.p.: per person
Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over, Jan. to Dec., source: RA 2019-2020; short breaks (2-4 days) of the German-speaking population aged 14-75 years, Nov. to Oct., source: RA 2019-2020

A look at the past year shows that demand for holidays is at a very high level. In 2019, 55 million people went on holiday, about the same number as in the previous year. This means that the holiday travel propensity has exceeded 78%, again. This indicator reflects the proportion of the population who went on at least one holiday of five days or more in 2019. The number of holiday trips almost reached 71 million, the total volume of expenditure was over €73 billion, more than ever before.

In addition, about 36 million short break travellers went on a total of 88 million short breaks with a duration of two to four days and spent almost € 24 billion.

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

Text: Ulf Sonntag

Holiday destinations 2019: Looking for sunshine

More international trips than ever before

More Germans than ever before have been travelling to destinations abroad. In 2019, 74% of all holiday trips went abroad (2018: 73%). This equates to more than 52 million trips.

Germany remains the most important holiday destination

Sun & beach destinations are clearly preferred – this fits the top holiday motivation "sun, warmth, nice weather". Compared to 2018, the Mediterranean destinations were able to grow once again towards a market share of 38% of all holiday trips. Turkey, Italy and France were among the winners in 2019.

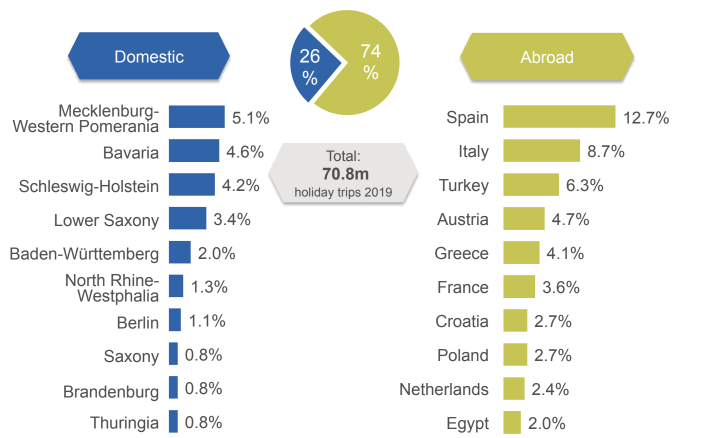
Stable destination rankings in Germany and abroad

Nevertheless, Germany remained the most important holiday destination for Germans, accounting for 26% of all holiday trips. The ranking of top destinations in 2019 was stable. In Germany, Mecklenburg-Western Pomerania was ahead of Bavaria, Schleswig-Holstein and Lower Saxony.

Winners abroad: Turkey, Italy and France

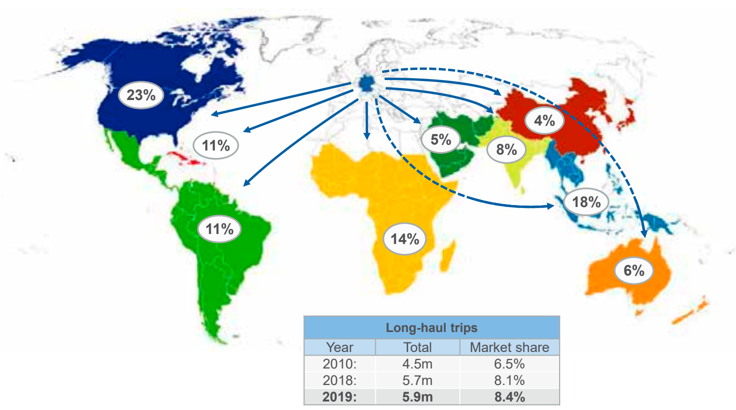
8% of all holiday trips are long distance trips: North American and Southeast Asian destinations dominate

Top 10 holiday destinations in 2019



Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over
Source: RA 2020 *face-to-face*

Long-haul trips in 2019 – market share by world region



Long-haul trips		
Year	Total	Market share
2010:	4.5m	6.5%
2018:	5.7m	8.1%
2019:	**5.9m**	**8.4%**

Basis: holiday trips (5+ days), long-haul destinations only; total sum > 100% due to rounding
Source: RA 2011, 2020 *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.

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Holiday travel behaviour: Air travel on a record high

Transportation: Car and plane almost on the same level

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

Slight increase in travel expenditure

The high demand for international destinations is also reflected in the choice of transport mode: It is true that almost three-quarters (73%) of air travellers have had at least a slightly guilty conscience about the associated climate impact ("flight shame"). Nevertheless, the share of air travel was 2019 once again at a record high of 42%.
The long-term trend in travel duration and travel expenditure continues. On average, people tend to travel slightly shorter, but spend more money.

Holiday travel behaviour in 2019

		2010	2018	2019	2019	
	Basis: holiday trips 5+ days = 100%	Total 69.5m	Total 70.1m	Total 70.8m	Domestic 18.7m	Abroad 52.1m
Means of transport	Car/motorhome	48%	45%	43%	75%	32%
	Plane	37%	41%	42%	<1%	58%
	Coach	8%	6%	6%	9%	5%
	Train	5%	5%	6%	15%	2%
Accom-modation	Hotel/motel/guesthouse	47%	48%	49%	29%	57%
	Holiday apartment/home	24%	25%	24%	38%	18%
	Camping	6%	7%	6%	8%	5%
Ø Average **holiday spending** per person and trip		€ 845	€ 1,017	€ 1,033	€ 602	€ 1,188
Ø Average **travel duration** in days		12.8	12.5	12.4	10.4	13.2

Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over
Source: RA 2011, 2019, 2020 *face-to-face*

Holiday organisation/booking: Online booking keeps growing

Digitalization is changing booking behaviour in the long term

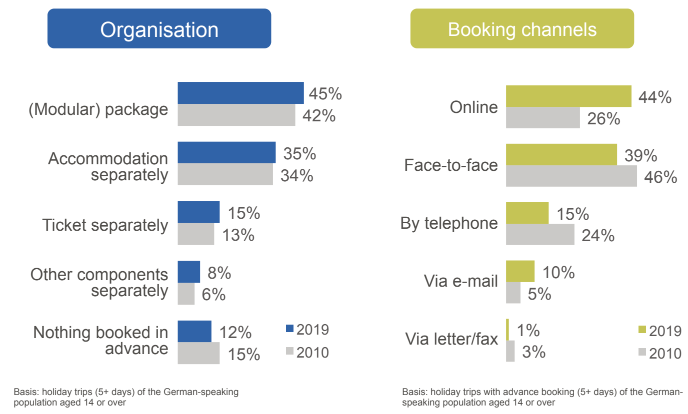
Since 2018, online bookings dominate the booking channels

Further increase in online bookings is expected

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

The structural change in holiday booking driven by digitalization is progressing: In 2019 online bookings continued to grow again. 2018 had been the first time that more holiday trips were booked online than face-to-face. This trend is expected to continue in the coming years.
In terms of holiday organisation, package tours and modular holidays continue to dominate over individual accommodation bookings.

Holiday organisation and booking in 2010 vs. 2019



Source: RA 2011, 2020 *face-to-face*

Inspiration & information and content marketing

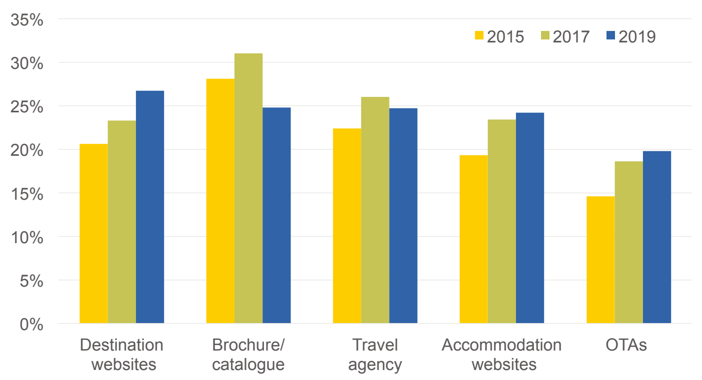
When planning their trip, most travellers use various sources of inspiration and information. Online and offline sources are often mixed. In the ranking, destination websites lead slightly in front of brochures/catalogues, advice in travel agencies, accommodation websites and OTAs. The trends since 2015 are quite clear: Online sources are gaining in importance, the travel agency is maintaining a high level, print is tending to decline slowly. Incidentally, social media channels such as Facebook or Instagram only play a minor role over-all, with the exception of the youngest age group of under 30 years of age, where they have a certain significance.

On average, 2.6 different online and offline sources are used for travel planning

Trends since 2015: Online sources win, Travel agency stable, Print slowly declining, but still important

Only 4% of all trips are inspired by Instagram

Inspiration & information when planning a holiday trip (Top5)



Basis: Main holiday trips 2019 (= most important trip 5+ days) of the German-speaking population aged 14 or over
Source: RA 2016, RA 2018, RA 2020, *Module Inspiration and Information*

In addition to the channels, it is of course also interesting to know what content the holidaymakers want to be addressed with. Different types can be identified: 12% are receptive to more in-depth storytelling, while 22% like content to be entertaining and short. A large proportion is looking mainly for facts: 32% are looking for information about experiences at the holiday destination, 27% for accommodation and prices.

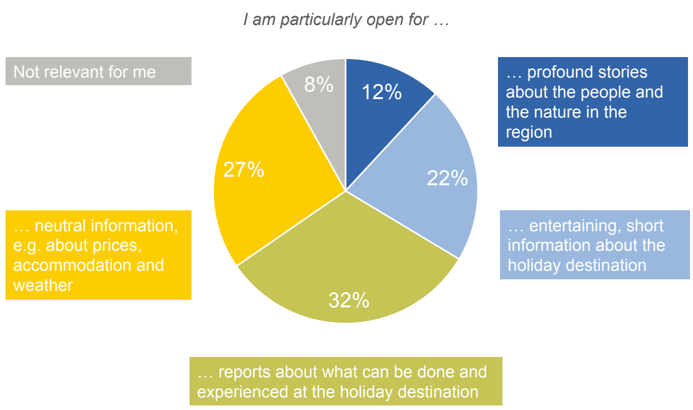
Not only the channels, but also the content is important

A majority likes to find facts about accommodation, prices, destination

Some like entertaining content

Some can be approached by storytelling

Content Marketing: Type of inspiration



Basis: Holiday travellers and short break travellers in the German-speaking population aged 14-75 years in Germany
Source: RA 2020, *Module Inspiration and Information*

More information in the module "Inspiration & Information"

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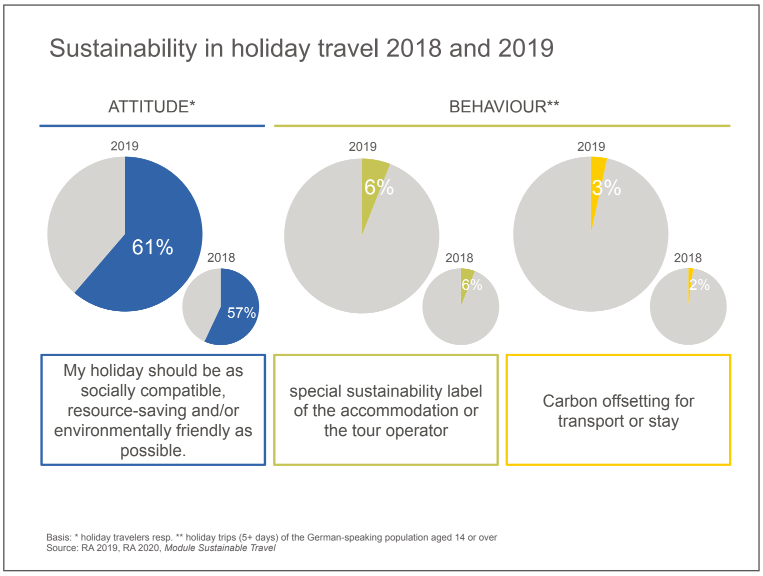
Sustainability: Huge gap between attitude and behaviour

For the majority of tourists, sustainability on holiday is an issue

In concrete behaviour, sustainability plays a rather subordinate role

Carbon offsetting or choosing eco-labelled accommodation remains at a very low level

In 2019, the gap between sustainable attitudes and sustainable behaviour on holiday trips remains very large. Although a majority of 61% of travellers have a positive attitude towards sustainable holidays, very few of them behave in a particularly sustainable way when travelling, for example by choosing certified accommodation or offsetting their CO_2 consumption. Compared to 2018, the positive attitude has increased, while there has been very little change in behaviour.

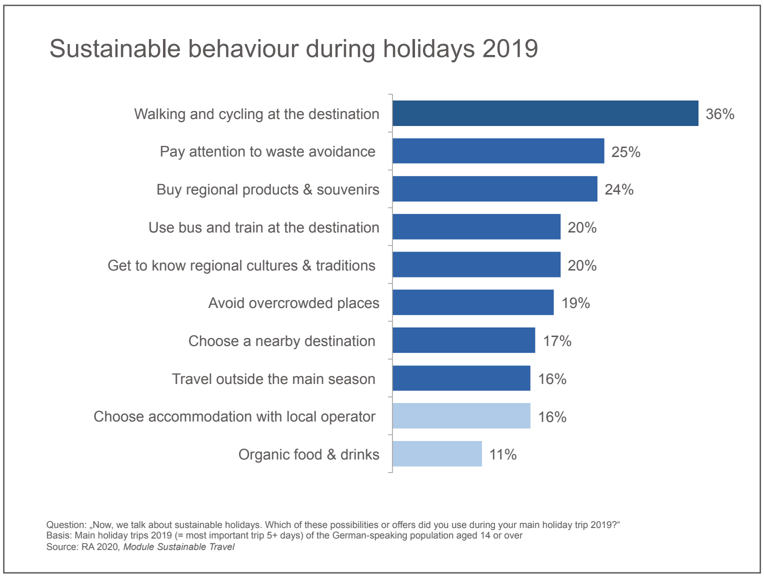


To some destinations, travel is already significantly more sustainable

At the destination, one behaves sustainably, where it is easy to do so, where it fits in well with the holiday and where one is used to it from everyday life

More information in the module "Sustainable Travel"

To some destinations, however, travel is already more sustainable: During 19% of trips to Norway, Sweden and Finland, accommodation with a sustainability certificate was booked and in 11% of these trips CO_2 was offset. During their stay at the destination, the holidaymakers try to behave correctly in terms of sustainability. The prevailing behaviour patterns are those that are easy to do and that fit in well with the holiday experience or that have been learned from everyday life.

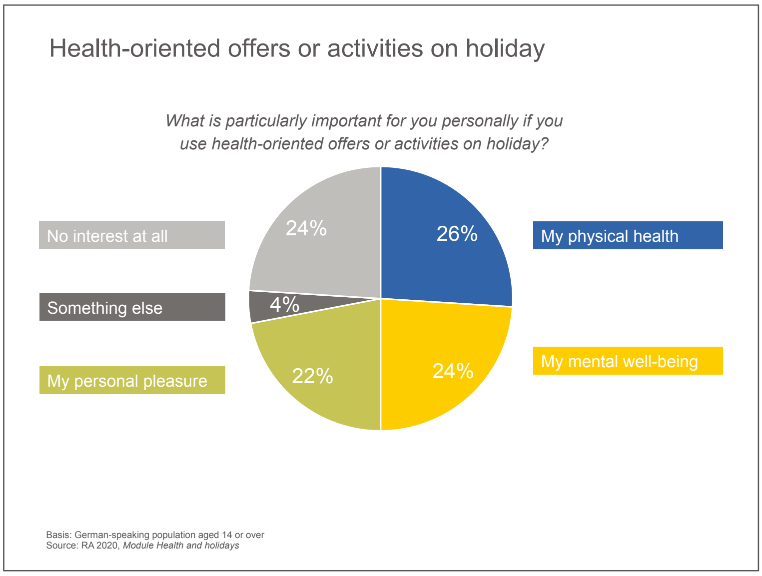


Health and holidays

Many users of health-oriented services, but only few take a dedicated health holiday

Although only few people take a dedicated health holiday, 76% of the population do not rule out the possibility of taking advantage of health-oriented holiday offers. In order to make and market such offers as attractive as possible, it is important to know what guests want and why they want something. That is why the RA 2020 for the first time examines the motives for using health-oriented offers. For 26% of the population the focus is on their own physical health, for 24% on their mental well-being and for 22% on their personal enjoyment. With this new segmentation it is now easier to make the right decisions for the right customer segment.

Different motives for using health-oriented offers



More information in the module "Health and holidays"

Read more in our Summary of the Reiseanalyse

Detailed summary of German travel behaviour

The summary of the Reiseanalyse provides a detailed abstract of key results of the Reiseanalyse data.

Key data in time series

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 insights into module results and Sinus-Milieus®

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

The summary of the Reiseanalyse 2019 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 2020 can be pre-ordered now and will be delivered in autumn 2020.

RA ReiseAnalyse 2020

With your participation in the RA 2020 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 2020

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 multiclient 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 Reisenalyse?

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.

bit.ly/RA2020-leaflet

Info folder RA 2020

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