

## VACATION TRAVEL TRENDS 2025

### Development of tourism demand in Germany + a look at the underlying motivation and preferences.

Berlin, ITB  
March 6, 2015

Presentation: Martin Lohmann



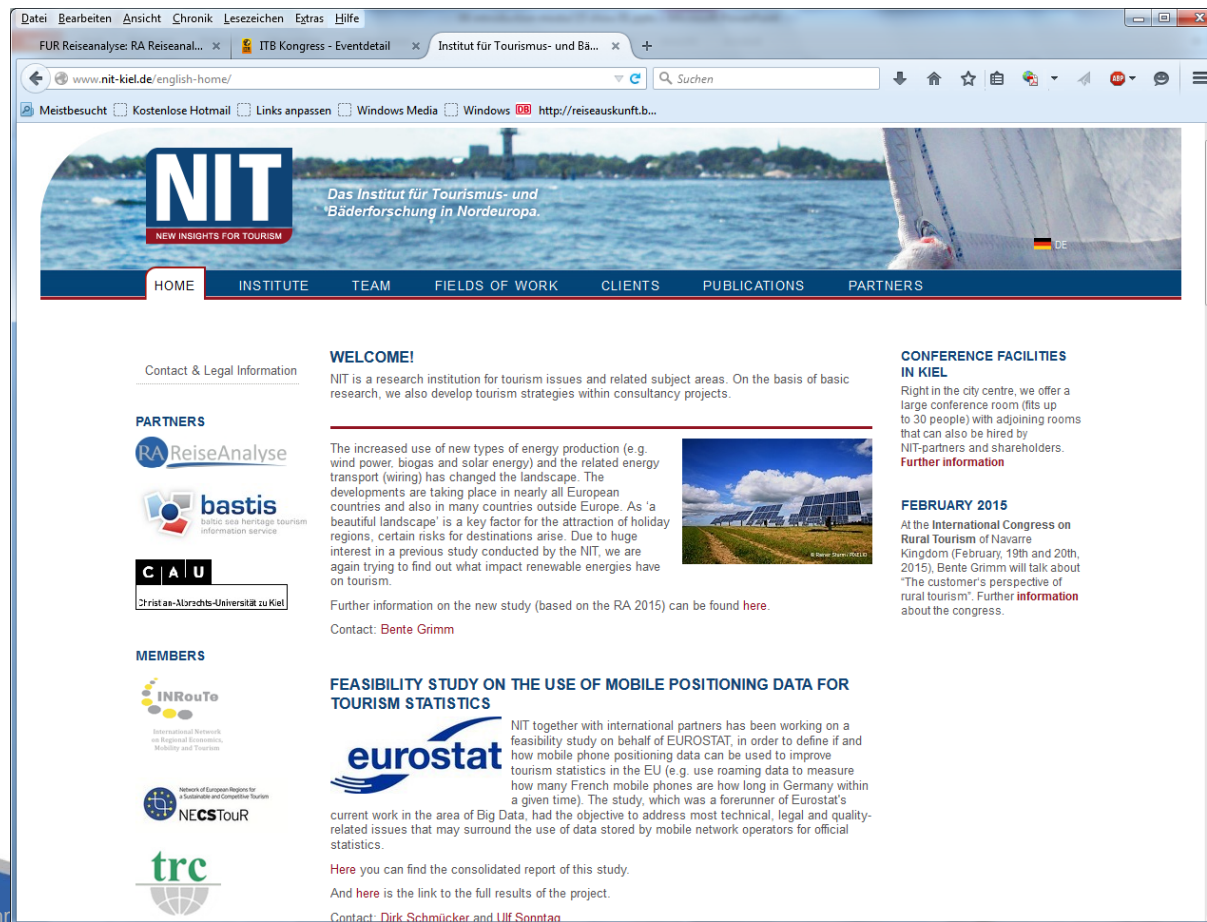
This document is part of a personal presentation and needs additional explanations.

# What we will see

## (“how the Germans really travel 2014/2025...”):

- » German holiday travel demand is reliable, stable consumption patterns  
(i.e. barely affected by external impacts or changes of the economic situation)
- » Germans travel a lot: one of the most important source markets in the world.  
(some 70 million trips p.a.; slight declines expected due to demographic change effects)
- » Stable demand ⇒ not a growth market ⇒ fierce competition
- » Potentials for e.g.
  - » Domestic & long haul trips
  - » Online information from personal sources & direct booking
- » Demand structure is dynamic:  
(along with demographic change and experienced travelers)
- » Consumers are “multi-optional”.  
(flexible, as they have a lot of attractive options in their consideration set)
- » Potentials will not unlock automatically  
⇒ Customer orientation with a focus on real consumer benefits

# How do I know?



## Tourism Demand in Germany

### RA “Reiseanalyse” (*Travel Analysis*) – Study profile

- » Research tool for the demand side of German holiday tourism **since 1970**.
- » **Yearly** survey; vast data basis for analyzing developments and trends
  - extensive experience and methodological competence
- » Covers **holiday** trips, short breaks, trip preparation and trip behavior as well as tourism related motivations, attitudes and preferences.
- » **Large sample**: Randomly selected face-to-face sample with some 7,500 respondents + online survey with n=5,000 respondents with two waves in May and November.
- » **Non-commercial** project, carried out by FUR an independent association of organizations interested in tourism research in Germany.
- » **Partners** include tourism marketing organizations of destinations on different levels (from regional to international), tour operators, carriers, media, etc. ; “user generated content”



# Why „Reiseanalyse“?

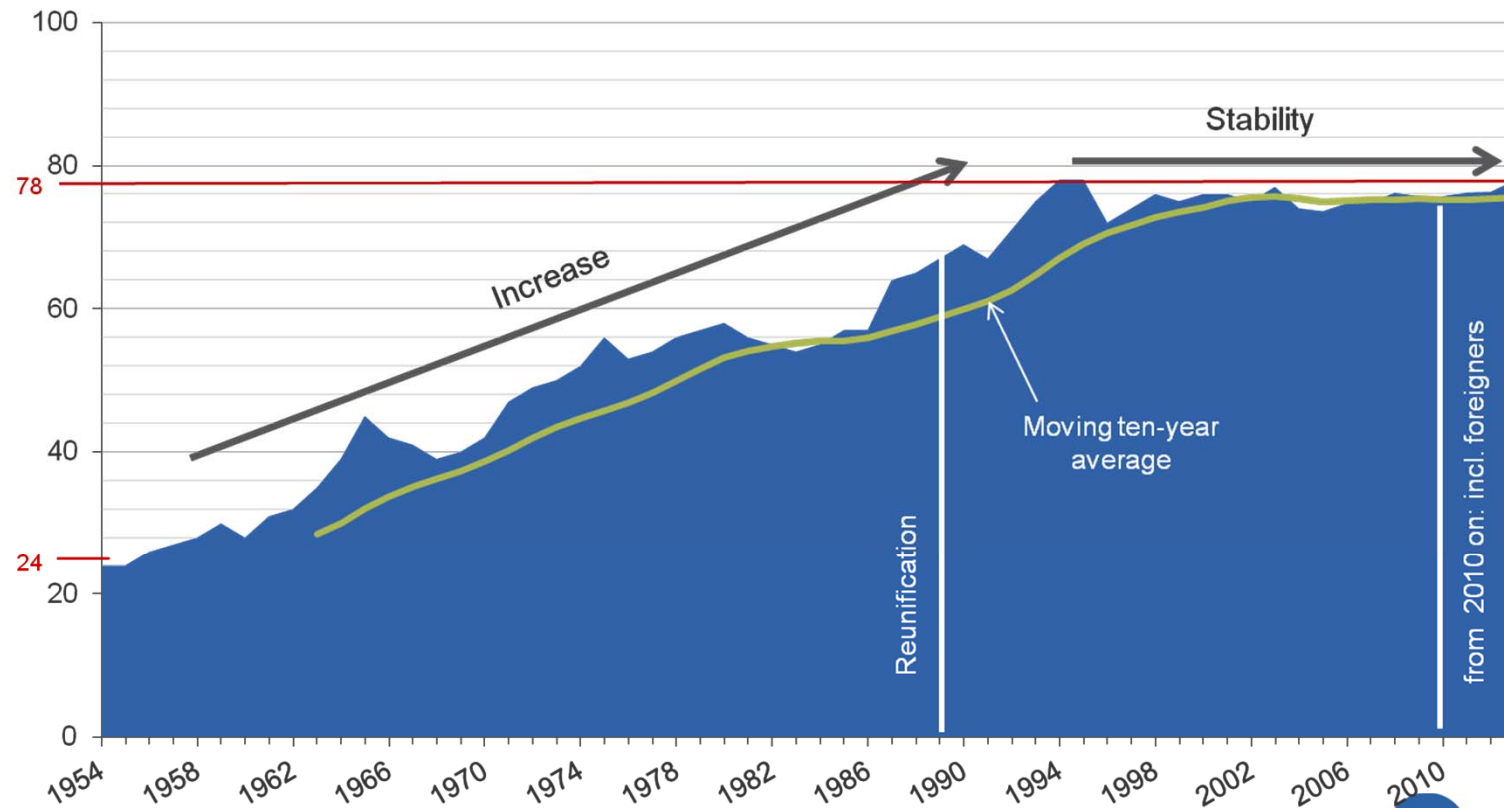
- To get to know one of the most important source market for tourism in the world.
- Learn about factual behavior, motives, attitudes & preferences of German consumers
- To assess demand potentials for destinations or types of holidays or other segments (volume; profile, competitive structure)
- To gain insights into long term trends



Demand for holiday trips on the German market:  
General patterns in a nutshell

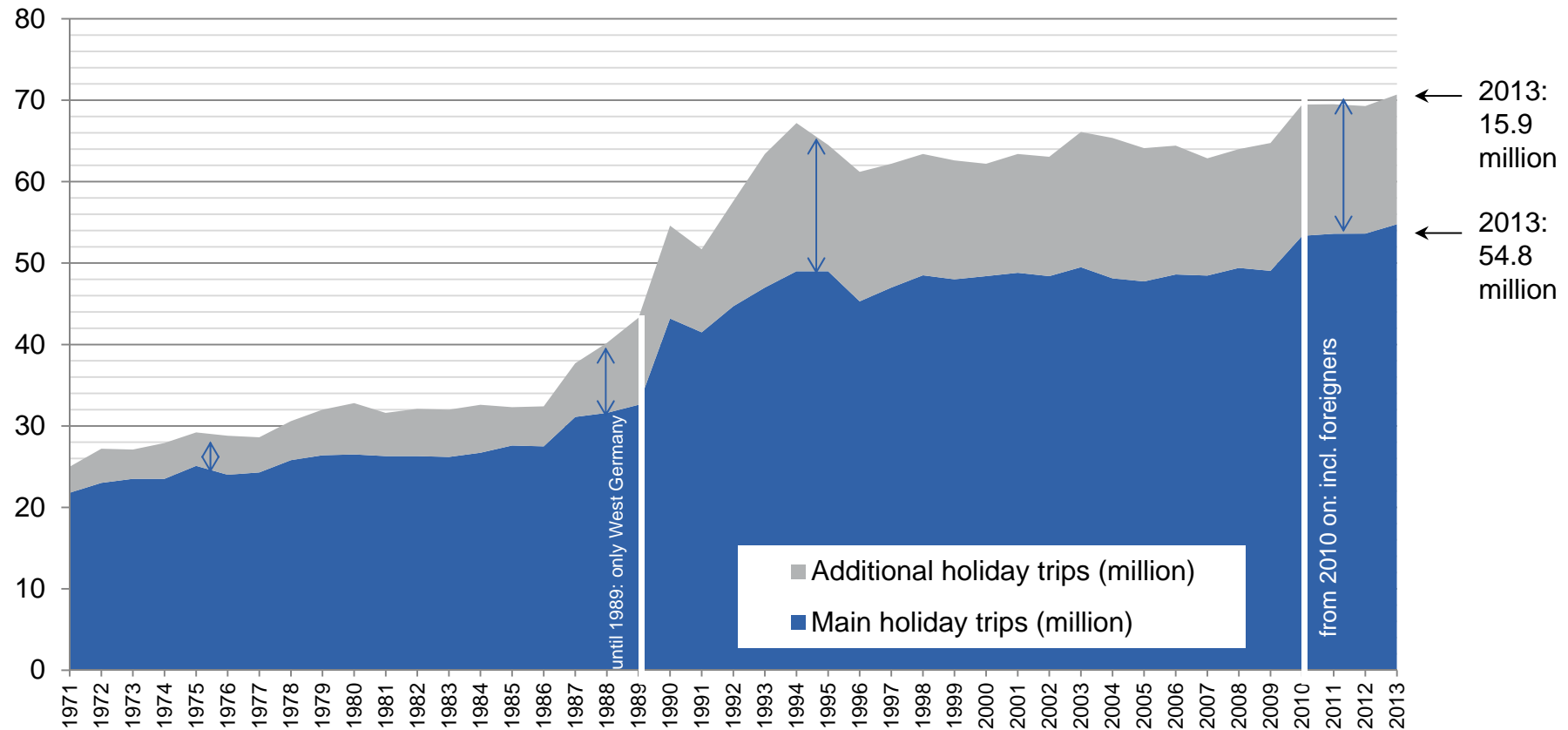
Scharbeutz, Baltic Sea, Germany, Photo: Günther, March  
2014

# German Holiday travel propensity





# Number of holiday trips since 1971



Holiday trips (lasting 5 days or more), in million.

German/German-speaking resident population aged 14 years or more in Germany (until 1989: only West Germany, from 2010 on: incl. foreigners), RA 1971-2014 *face-to-face*.



# Holiday and short holiday trips – key figures 2014



Holiday trips (5 days and more)

Year	Travellers	Holiday trips per person	Holiday trips	Expenditure p. p. and trip	Turnover
2014	54.6 m	1.29	70.3 m	€958	€67.3 b

Short holiday trips (2-4 days)

Year	Short holiday travellers	Short trips per person	Short holiday trips	Expenditure p. p. and trip	Turnover
2014	32.6 m	2.32	75.7 m	€261	€19.8 b

Holiday trips (5+ days): German-speaking population 14+ years, January to December;  
Source: RA 2015

Short holiday trips (2-4 days): German-speaking population 14-70 years, November to October;  
Source: RA online 5&11/2014

# Trend Research

Scharbeutz, Baltic Sea, Germany © 2010 Conther, Madison

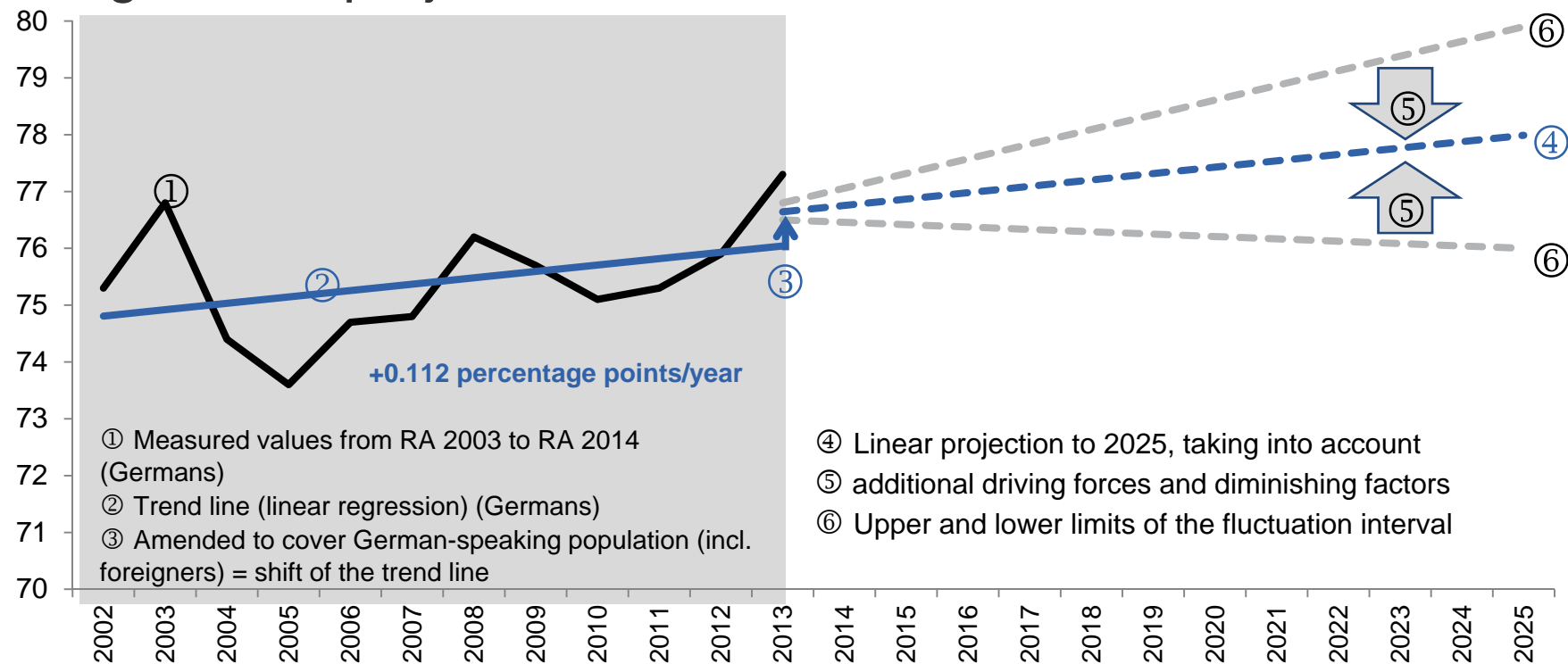
# How to identify “trends” and their future?

**Future planning is based on rules  
and what lasts.**

**Data based considering!**

**i.e.: you need valid and reliable data  
and thinking is involved.**

# Supporting the trend assessment through linear projection



Schematic example of holiday travel intensity (in %), aggregated across all age groups to better illustrate the trend.  
Basis: Germans and German-speaking residential population aged 14 years and older in Germany.

## Holiday trips, key demand figures, projection 2025:

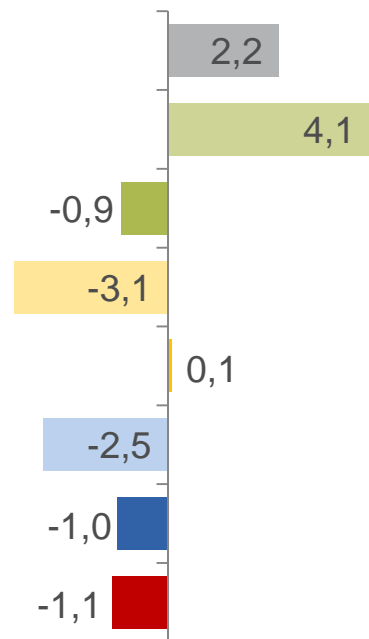
Further **stability** to be expected

	2014	2025 (lower estimate)	2025 (middle estimate)	2025 (higher estimate)
<b>German-speaking population</b> (14+ years; million)	70.5		70	
<b>Holiday travel propensity</b> (in % of population)	77,4%	76%	78%	80%
<b>Volume of holiday travellers</b> (million)	54.6	53	55	57
<b>Holiday trips per holiday traveller</b>	1.29	1.21	1.25	1.29
<b>Volume of holiday trips</b> (million)	70.3	67	70	73

German-speaking population 14+ years: 2014: RA 2015;  
2025: Lohmann, M., Schmücker, D. & Sonntag, U. (2014): German Holiday Travel  
2025 Development of holiday travel demand in the German source market. (The  
Reiseanalyse trend analysis).

# Age structure of holiday travellers today and 2025: New dynamics!

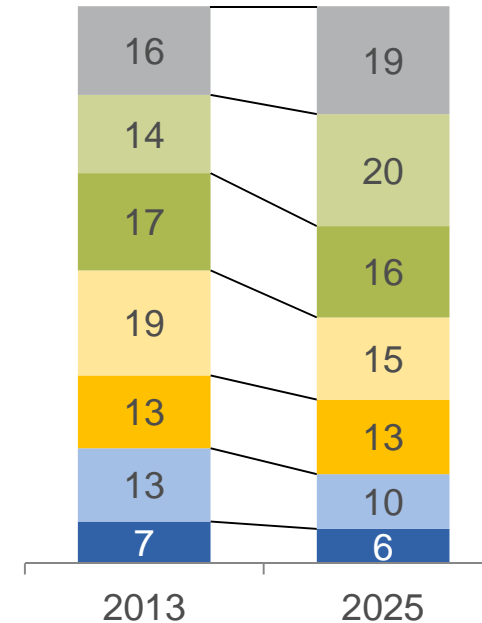
Balance (million) 2013 → 2025



Age



Share of all holiday trips (%)



German-speaking population 14+ years; 2013: RA 2014;  
2025: Lohmann, M., Schmücker, D. & Sonntag, U. (2014): German Holiday Travel 2025 Development of holiday travel demand in the German source market. (The Reiseanalyse trend analysis).



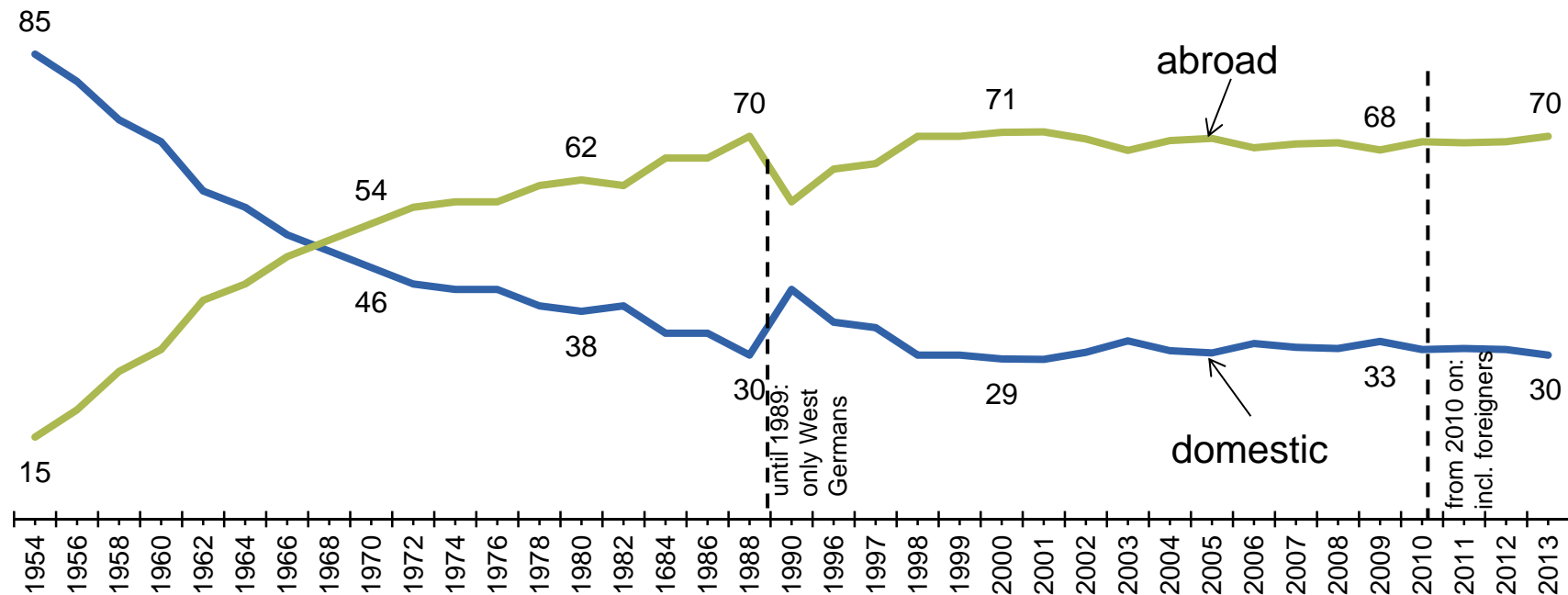


## Holiday Trips

La Martinique; Photo: Lohmann, 2011



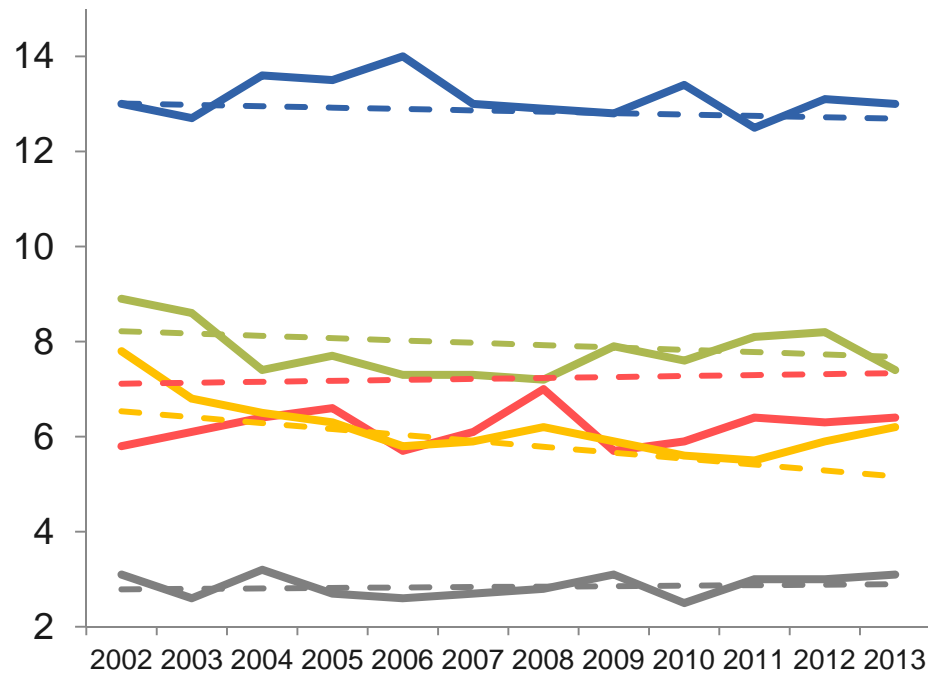
# Domestic/foreign travel destinations since 1954



Holiday trips (lasting 5 days or more), in %, timeline not equidistant.

Germans/German-speaking resident population aged 14 years and older (until 1989: only main holiday trips in West Germany, from 2010 on: incl. foreigners), RA 1970–2014 *face-to-face*, 1954–1969: miscellaneous studies.

# Market share of the top five foreign travel destinations, projection to 2025



Spain

Italy

Turkey

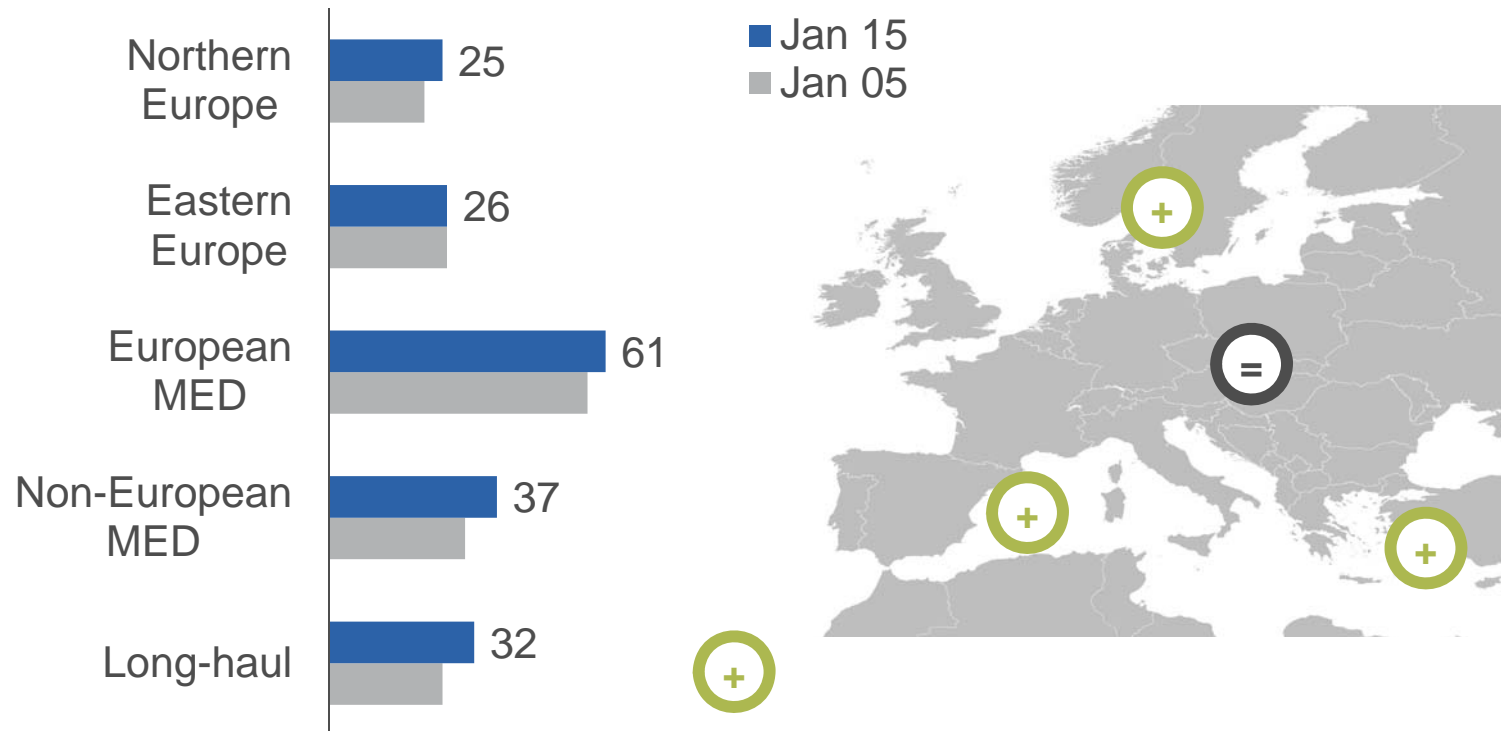
Austria

France

2025		
Lower estimate	Middle estimate	Upper estimate
12.0	13.0	14.0
6.5	7.5	8.5
6.5	7.5	8.5
4.5	5.5	6.5
2.5	3.0	3.5

Holiday trips (lasting 5 days or more), market share in %; figures for 2002-2013: German-speaking resident population aged 14 years and older, RA 2002-2014 *face-to-face*; trend line: German-speaking resident population aged 14 years and older; figures for 2025: German-speaking resident population aged 14 years and older, authors' estimates.

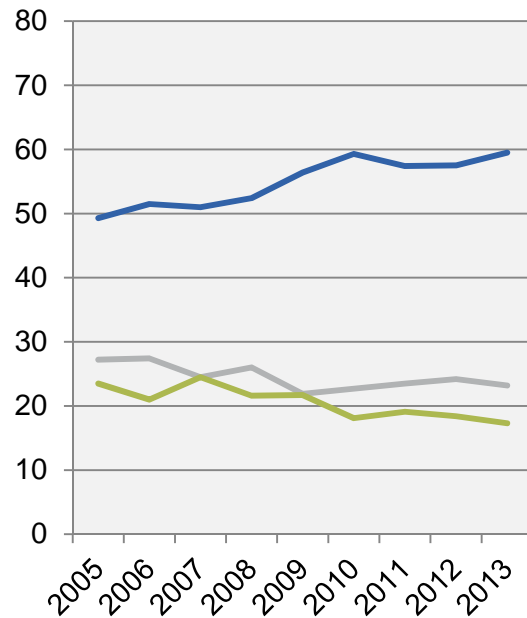
## Destination Interest: Dynamics 2005-2015



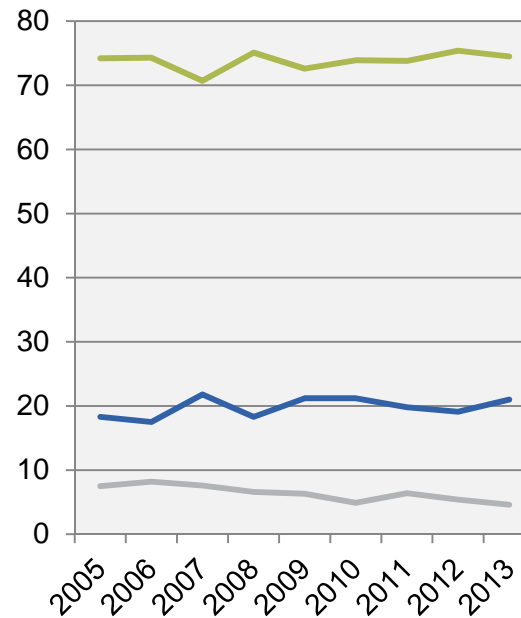
Figures in %, multiple answers  
 Expressed total interest for holiday destinations in the next 3 years  
 German-speaking population of 14+ years  
 RA 2004 and RA 2015 *face-to-face*

# Organization by region since 2005

## Germany



## Mediterranean



— Only individual products booked

— Package tour or component/modular tour

— Nothing booked in advance

Holiday trips (lasting 5 days or more), share in %.

German resident population aged 14 years and older in Germany (without foreigners), RA 2006–2014 *face-to-face*.



## Dynamics & Stability

Chichu Drake, Himalaya, Bhutan. Photo: Lohmann, Oct. 2014

# Holiday travel trends 2025: Stability & Dynamics

**Stability:**

**You can rely  
on ...**

**Dynamics:**

**Change is  
here...**

# Holiday travel trends in 2025: Stability

Demand volume	Hardly any changes in overall volume
Motives & interests	Same basic needs, high standards
Travel destinations	Clear positions with respect to major regions
Info & decision-making	Great importance of personal sources of information; offline remains important
Organization & booking	TO strong around the Mediterranean, "brick-and-mortar" travel agencies remain important
Types of travel	Beach, resting, family, nature remain the major holiday themes
Seasonality	Holidays are in the summer
Means of transportation	Car or aeroplane, what else?

Stability

You can rely on that.



# Holiday travel trends in 2025: Dynamic development

Demand volume	New target group weights
Motives & interests	Growing demands due to good products, multi-optionality as the basis for flexible consumer reactions
Travel destinations	Growth for domestic holidays; room to grow for long-haul
Info & decision-making	Increasing familiarity with the (mobile) internet as a medium of information, Impact on decision-making strategies
Organization & booking	More and more bookings online direct from the provider (impact on information needs)
Types of travel	+: beach, sightseeing, cities
Accommodation	Increasing market shares for hotels, higher quality standards (at least as good as at home, but more original), privacy important

Dynamic development

Change is happening here!

# Holiday motives of the Germans, 1975–2015

Jan. 1975

Jan. 1985

Jan. 1994

Jan. 2004

Jan. 2015

TOP 5: The most important motives are . . .

Mentioned most frequently	Unwinding, relaxing (64%)	Unwinding, relaxing (65%)	Unwinding, relaxing (71%)	Relaxation, etc. (65%)	Sun, warm weather, ... (69%)
	Leaving everyday behind (62%)	Leaving everyday behind (58%)	Leaving everyday behind (66%)	Leaving everyday behind (59%)	Leaving everyday behind (68%)
	Finding new strength (54%)	Finding new strength (47%)	Experiencing nature (52%)	Being free, having time (58%)	Relaxation, etc. (66%)
	Being with nice people (53%)	Resting, not doing anything (43%)	Finding new strength (52%)	Finding new strength (57%)	Finding new strength (62%)
	Being outdoors (50%)	Experiencing nature (38%)	Totally new impressions (51%)	Time for one another (49%)	Having fun (61%)

“Particularly important” only for few people:

Mentioned least frequently	Discovering things (17%)	Refreshing memories (12%)	Discovery, risk, etc. (16%)	Light sports activities, etc. (9%)	Flirt / erotic adventure (14%)
	Improving my education (16%)	Discovery tour (10%)	Doing s.th. for my beauty (12%)	Discovery, risk, etc. (7%)	Discovery, risk, etc. (14%)
	Actively engaging in sports (15%)	Hobbies, etc. (7%)	Actively engaging in sports (12%)	Actively engaging in sports (7%)	Actively engaging in sports (10%)

2015 list with 29 categories, other years different lists and questions, multiple answers permitted; some statements are shortened; rankings according to % values for “particularly important”, holiday travellers among the German residential population aged 14 or older (without foreigners, 1975 and 1985: only West Germans), RA 1972, 1984, U+R 1994, RA 2004, 2014 face-to-face.



„Lessons learned“

Kathmandu Airport, Nepal; Oct. 2014 (Foto: Martin Lohmann)

# Lessons learned

## (“how the Germans really travel 2014/2025...”)

- » German holiday travel demand is reliable, stable consumption patterns  
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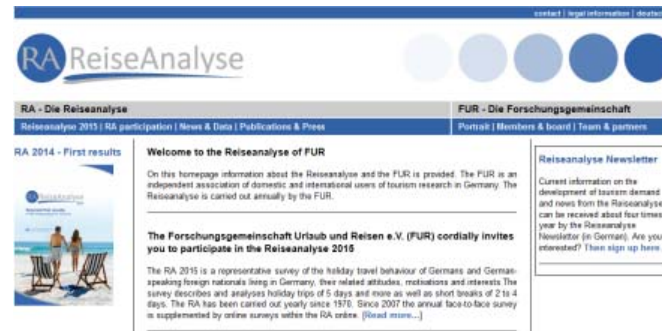
## Summary take aways



- » Tourism is a future industry, a sector of opportunities.  
As the sector transforms itself, German consumers are reliable travelers.
- » Customer orientation is key for success.
- » Tourists travel to live up their holiday motivation.  
“Hot topics” like mobile technology, sharing economy, sustainability, safety etc. are important as “facilitators”. However, they are not key factors in maintaining demand for the future.
- » Holistic focus on consumer benefits.
  - Tourism industry should carefully monitor motives,
  - assure that tourists find, what they are looking for and
  - research the effects of holidays.

## Looking for more?

- ▶ [www.reiseanalyse.de](http://www.reiseanalyse.de)



- ▶ Publication I:  
RA 2014 Summary (in English)
- ▶ Publication II:  
German Holiday Travel Trends 2025  
(„The Reiseanalyse Trend Study“) (in English or German)
- ▶ Reiseanalyse 2015:  
The whole deal 😊

## Paper & Author

- This paper has been prepared for the ITB Berlin Convention, ITB Marketing and Distribution Day, on March 6, 2015.
- The author, Martin Lohmann, is Managing Director of NIT, the Institute of Tourism Research in Northern Europe in Kiel, Germany ([www.nit-kiel.de](http://www.nit-kiel.de)). In addition Martin is as a Professor for Consumer Behavior with the Leuphana University in Lüneburg, Germany ([www.leuphana.de](http://www.leuphana.de)), and teaches at the Modul University in Vienna (Austria).
- Martin and his colleagues at NIT are part of the Reiseanalyse team since many years. They take care of the RA both as scientific advisor and as operating agency for all the activities necessary to run the yearly survey.
- Contact:  
[lohmann@reiseanalyse.de](mailto:lohmann@reiseanalyse.de)







**FUR Forschungsgemeinschaft  
Urlaub und Reisen e.V.**

Fleethörn 23  
D-24103 Kiel  
Germany

Tel.: +49 (0)431 88888 00  
Fax: +49 (0)431 8888 679

Martin Lohmann

E-Mail:

lohmann@reiseanalyse.de

Website: **www.reiseanalyse.de**