

Trends and Analyses: Holiday Travel Patterns of German Tourists

Christian Krause
ADAC Verlag
christian.krause@adac.de
www.media.adac.de

SURVEY PROFILE

Since 1995, ADAC publishing has been collecting data reflecting the holiday-taking behaviour and travel habits of German tourists.

The Reisemonitor

- is a trend study
- is published annually (December)
- covers holidays of 5 days and more
- is representative of 16.4 million ADAC members

Sample

- 4,000 private households
- Field work: GfK Panel Services, Nuremberg

Contact

- The complete study is available at www.media.adac.de
- Responsible study contact:
Christian Krause,
ADAC Verlag GmbH, München

INHALTSANGABE

Trends for 2009

- Holidays – yes or no?
- Save or enjoy?

Holiday-related decisions

- Duration
- Travel seasons
- Accommodation

2009 destinations

- Tops and flops

Decision-making processes

- Planning lead times
- Booking accommodation

Holiday organisation

- Self-organised or package?
- Drive or fly?
- Book ahead or not?

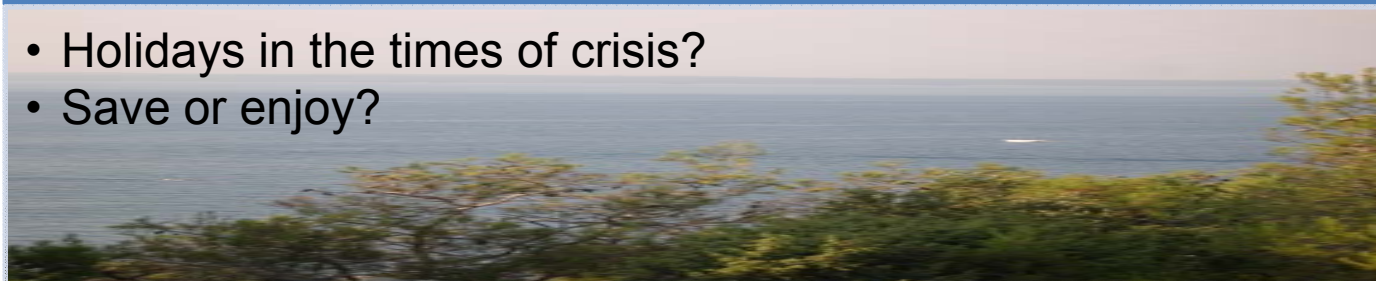
Vacation details

- Type of holiday
- Motivation

Part 1

Trends for 2009

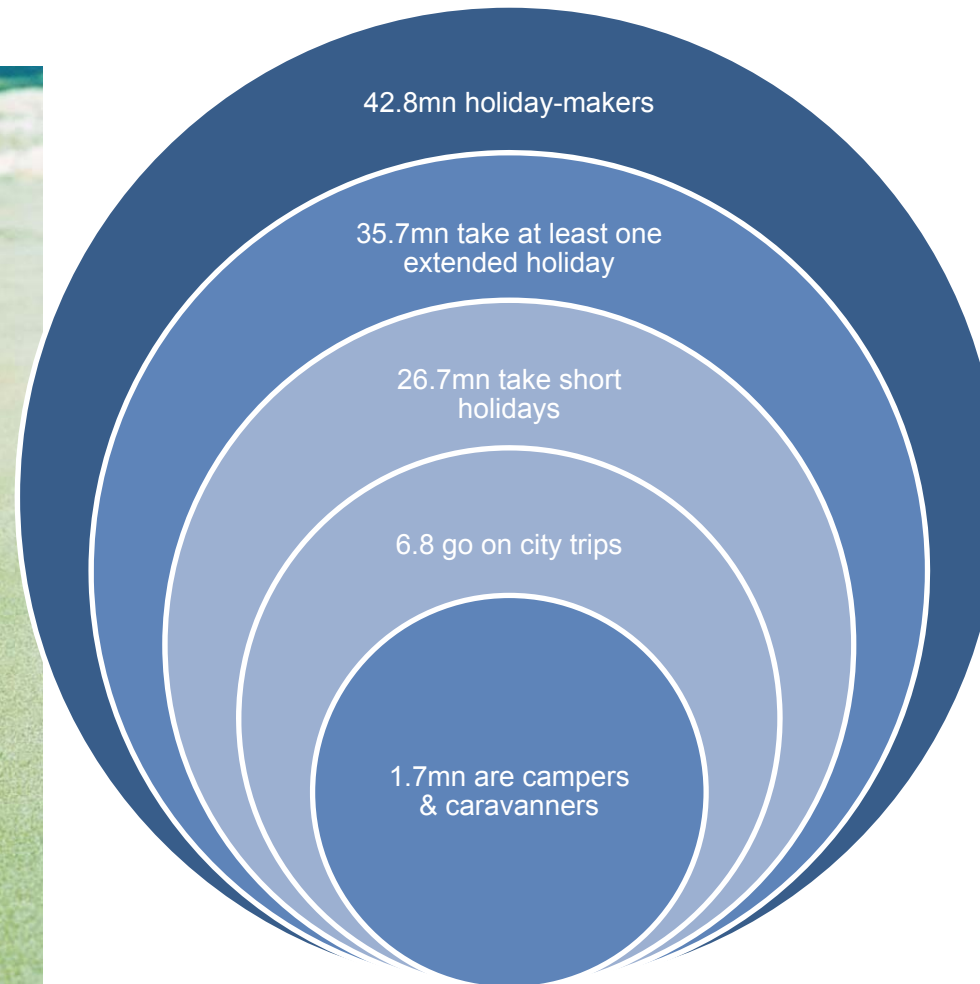
- Holidays in the times of crisis?
- Save or enjoy?



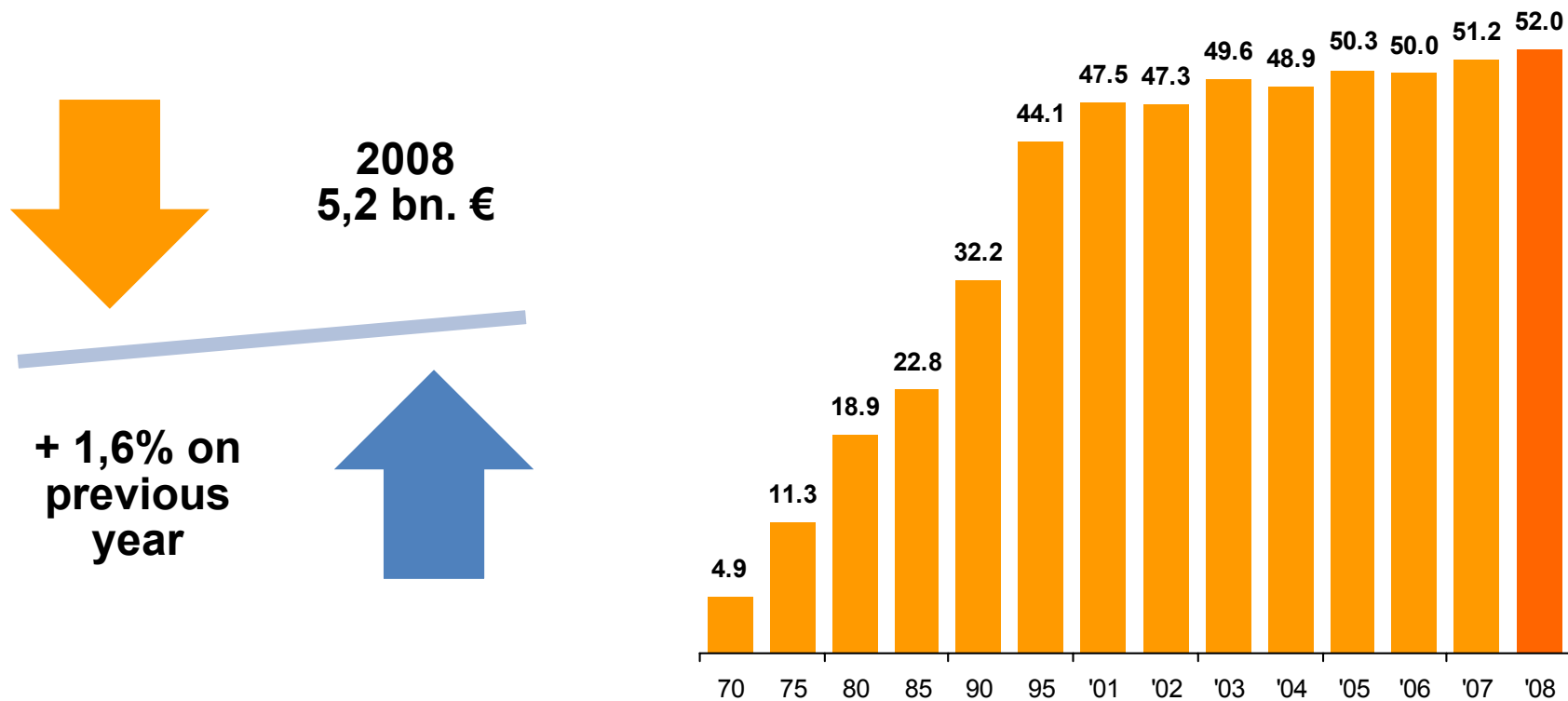
German holiday-makers in 2008*



* Source: VA [Consumer Analysis] 2008



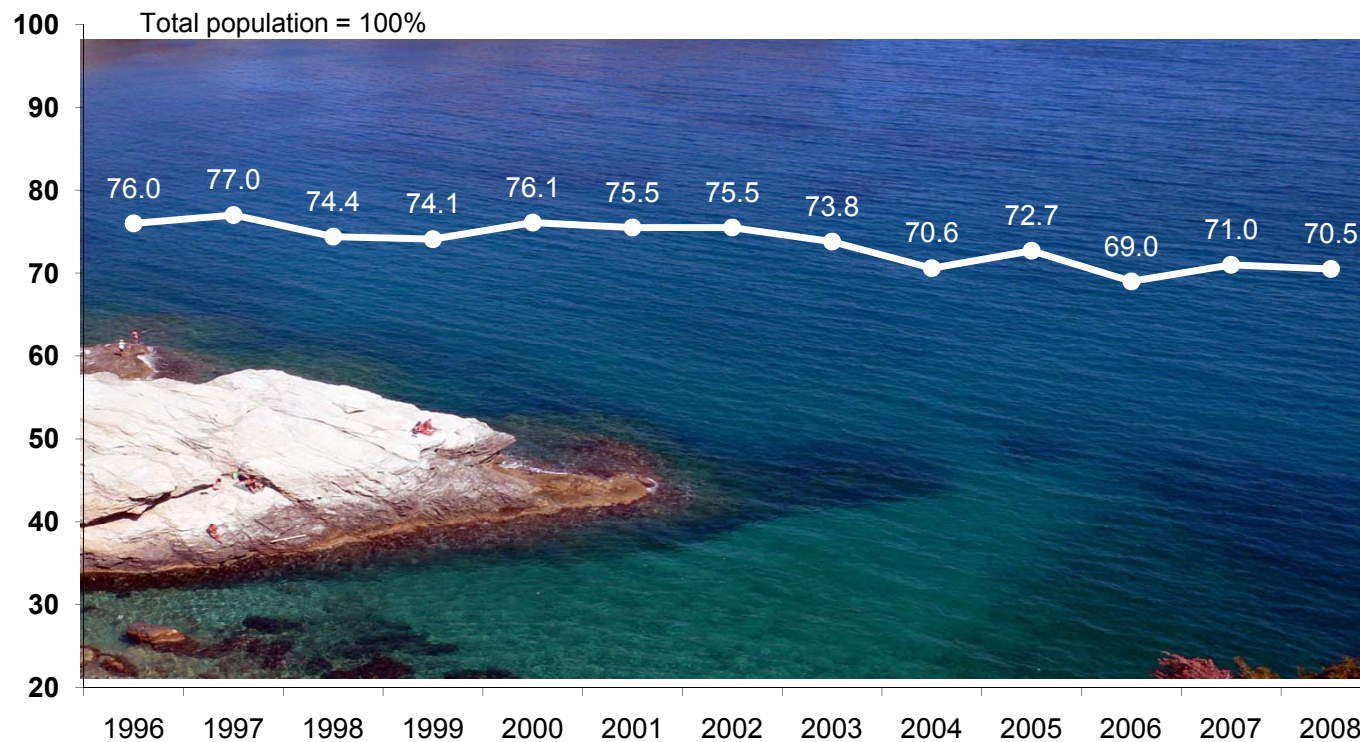
German tourists' spending for *private* outbound travel 1970 – 2008 (in billion Euros)



Source: Deutsche Bundesbank

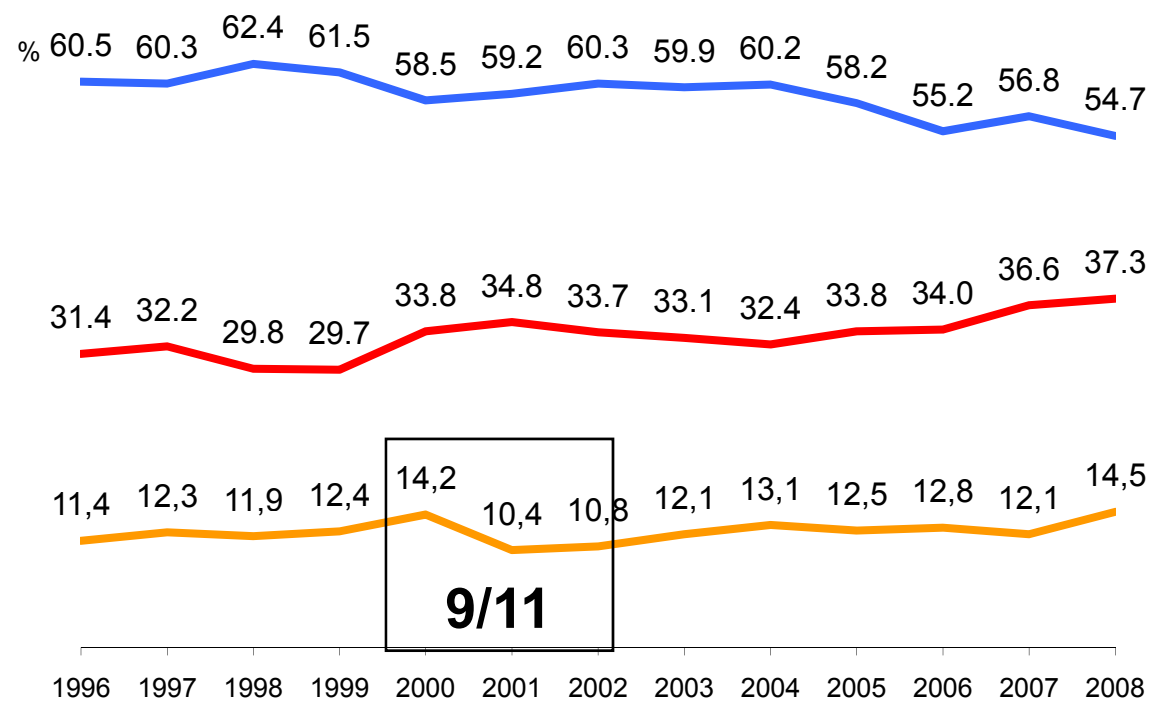
holiday-makers 1996 – 2008

**The 2008 travel market was stable
70.5% went on at least one extended holiday**



Holiday travel 1996 – 2008

Domestic holidays in Germany and holidays overseas are gaining



Holidays in European countries
- 3,7%

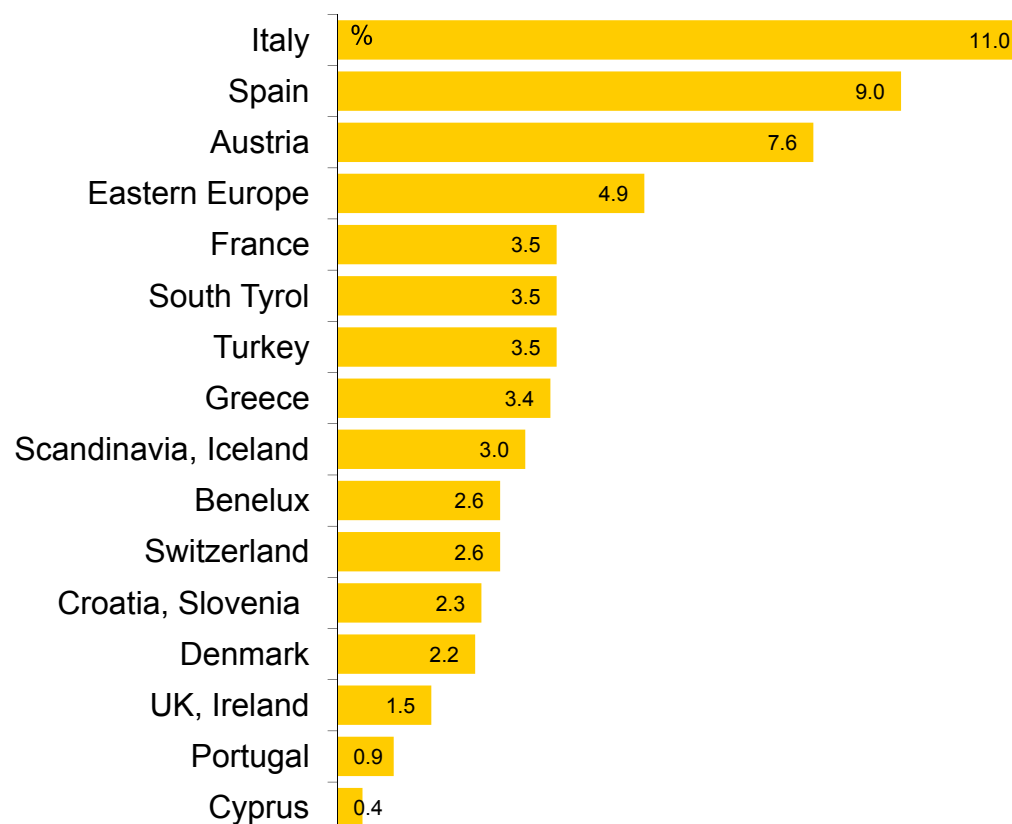
Holidays in Germany
+ 1,9%

Holidays overseas
+ 19,8%

Multiple responses were possible.

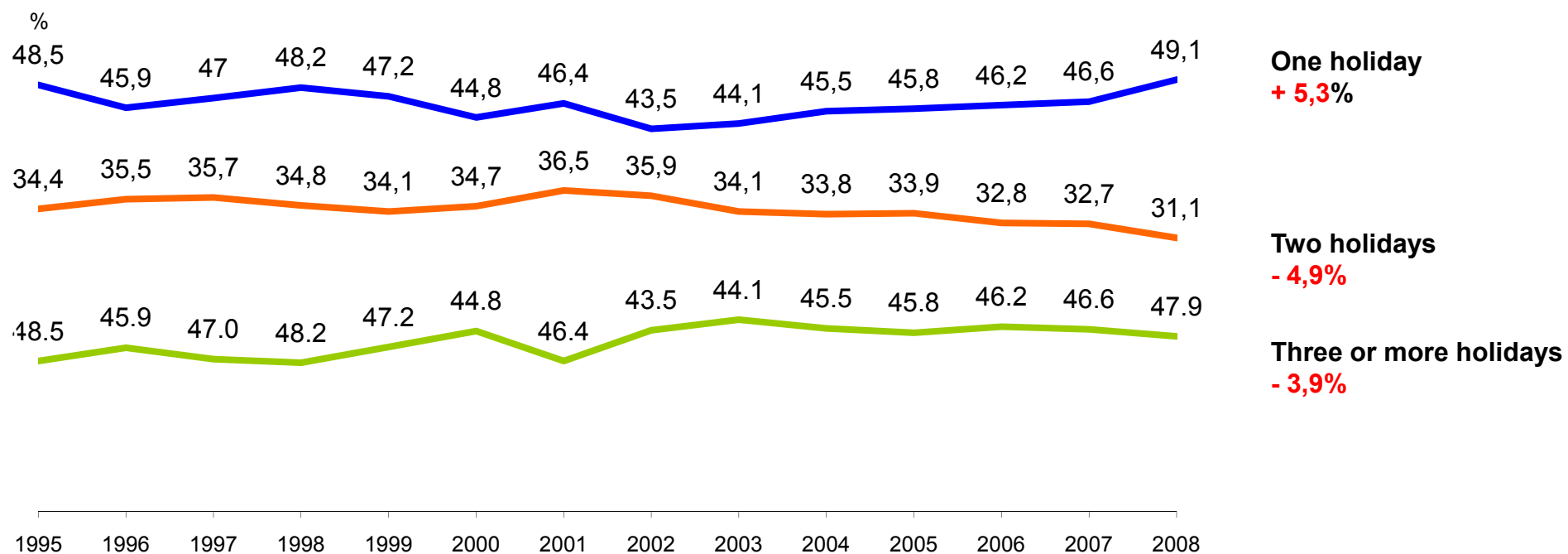
2008 Holiday travel EUROPE (excl. Germany)

Italy remains the most popular European holiday destination for Germans



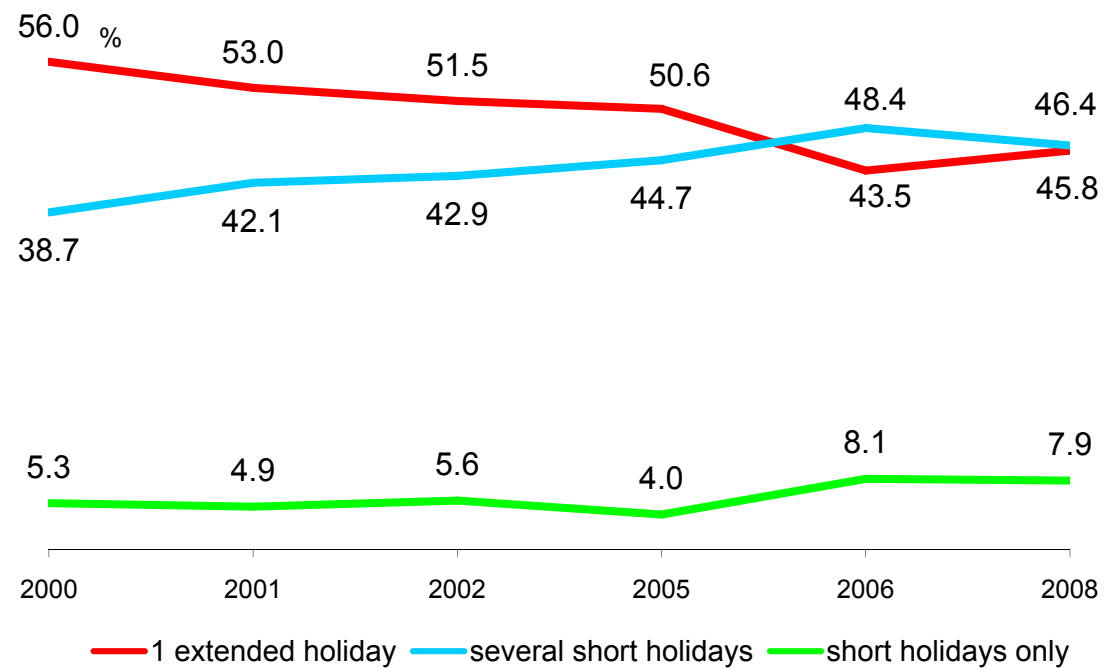
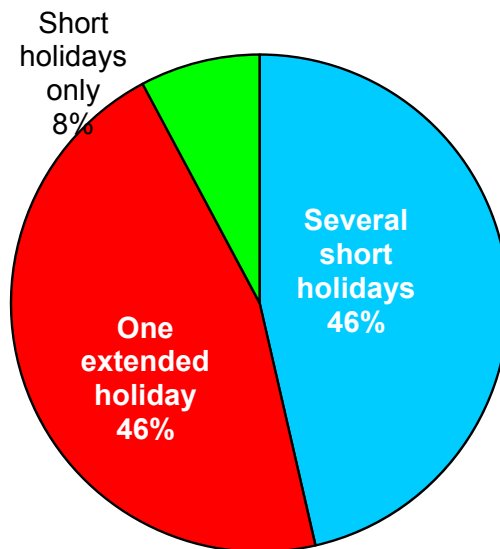
HOLIDAY FREQUENCY 1995 - 2008

Percentage of multiple holidays per year declining



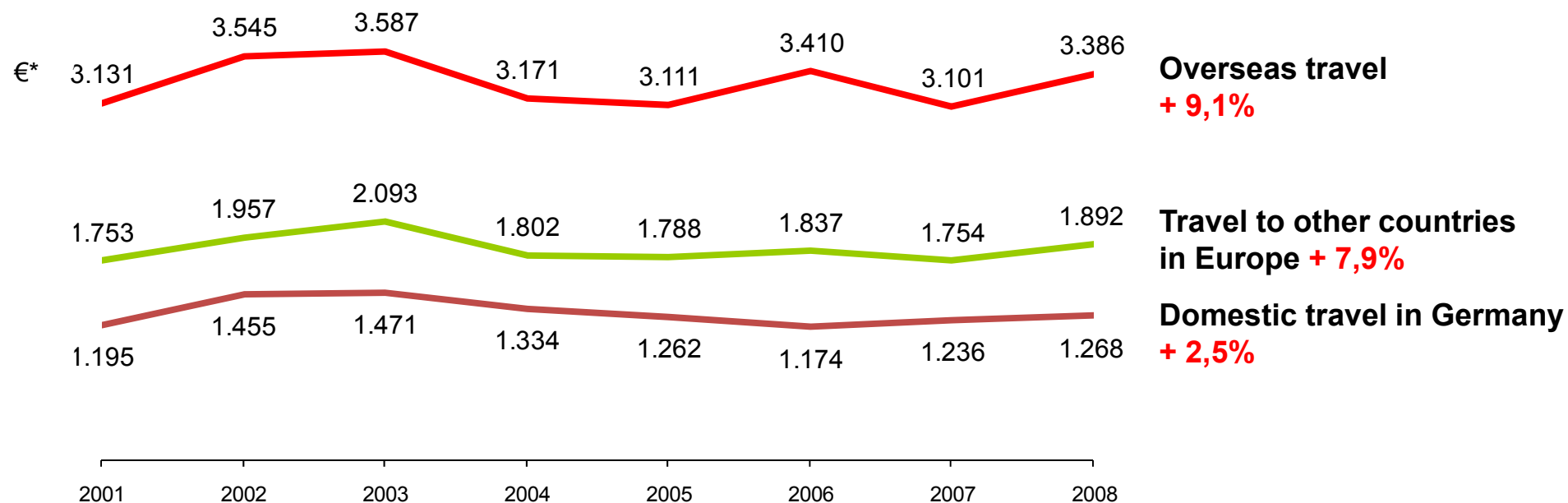
Holiday planning: popularity of **extended single** annual holidays rising

Trends in annual holidays



HOLIDAY SPENDING (€) by destinations

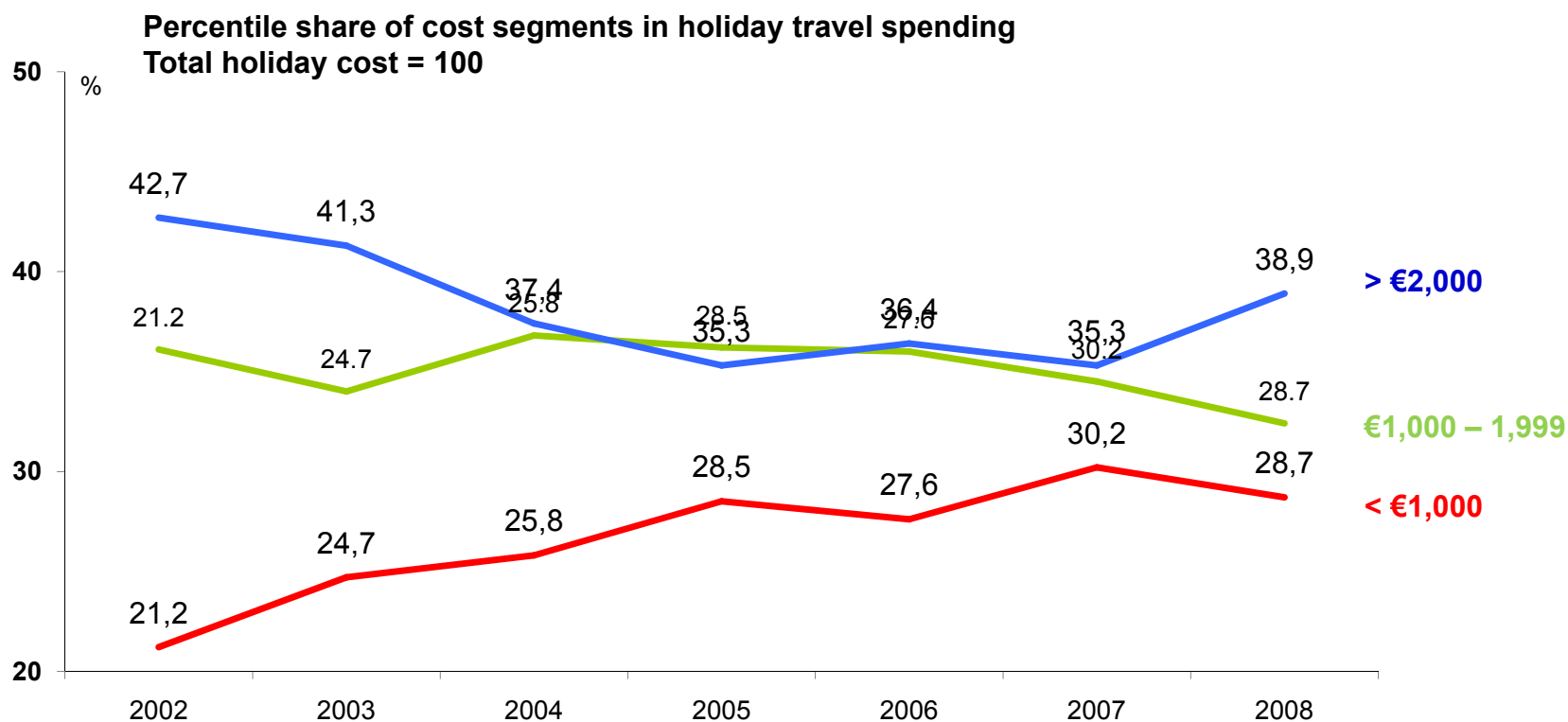
In 2008, travel to other countries in Europe and overseas travel was more expensive than in 2007 (in thousand Euros)



* Average cost

HOLIDAY SPENDING 2002 – 2008

High-end travel gains in 2008
Tendential losses in the mid-price segment



December 2008: Germany confronts international financial crisis

Suche nach Ausweg aus der Krise

Koalition will Kauflust steigern

SPD und Union
Debatte über I
Aufträge für Autos aus Deutschland eingebrochen

Berlin – Die große K
sich wegen der schlechten
aussichten selbst unter i
ren Handlungsdruck. Ti
sicht, zunächst die Wirku

Konzerne steuern in ein Krisenjahr

Branchenverband warnt vor Stellenabbau. US-Konzerne fordern 34 Milliarden Dollar Staatshilfe

Von Harald Schwarz

Frankfurt – Die Krise der Autoindustrie spitzt sich 2009 zu. Deutsche Hersteller befinden sich auf einer „beschleunigten Talfahrt“, warnte der Branchenverband VDA. Neben den Absätzen sind auch die Auftragsrückgänge eingebrochen. Die US-Autokonzerne sind stärker angeschlagen als bekannt: Sie fordern 34 Milliarden US-Dollar Staatshilfe.

tiefen Einschnitten bei Personal und Produktion, dem Verkauf einzelner Marken und der Entwicklung verbrauchsärmerer Kleinwagen aus der Krise kommen.

Diese schlechten Nachrichten aus der Autoindustrie haben am Mittwoch auch die Stimmung am deutschen Aktienmarkt gedrückt. Der Dax verlor kräftig, aber erholte sich wieder. Bis 17 Uhr gab er 0,34 Prozent auf 4516 Punkte ab. Zu den größten Verlierern gehörten die Ak-

beitsplätze 2009 verlor nicht sagen. Der St „von der Länge und Ti So seien die Unternel „hochqualifiziertes S lange wie möglich“ zu arbeiter würden nach gebraucht.

Ende September be sche Autohersteller 761 600 Frauen und M

„Lage ist besorgniserregend“

Wirtschaftsminister Michael Glos fürchtet um Autozulieferer

Von Thomas Öchsner

Berlin – Bundeswirtschaftsminister Michael Glos (CSU) fürchtet den Verlust von Arbeitsplätzen in der deutschen Automobil-Zulieferindustrie. „In meinen Augen ist die Lage besorgniserregend“, sagte Glos nach einem Gespräch mit Ver-

wie etwa BMW, Daimler oder VW schicken außerdem Leiharbeiter zurück an deren Arbeitgeber. Ob die Zeitarbeitsfirmen aber neue Jobs für ihre Leiharbeiter finden, ist fraglich. Die gewerkschaftsnahe Hans-Böckler-Stiftung rechnet in der gesamten Zeitarbeitsbranche mit Entlassungen von bis zu 250 000 Leiharbeitern.

Koalition reagiert auf Vorwurf der Untätigkeit

Merkel und Steinmeier laden zum Krisengipfel

Treffen mit Bankenchefs am kommenden Sonntag soll Debatte über neue Milliardenprogramme beenden

Von Susanne Höll
und Tanjev Schultz

Berlin – Bundeskanzlerin Angela Merkel reagiert auf Klagen über ein Zögern Deutschlands in der Wirtschaftskrise und lädt Politiker und Experten für nächsten Sonntag zu einem Spitzentreffen ein. Entscheidungen werden nicht erwartet. Merkel und SPD-Politiker erhoffen sich aber ein Ende der verwirrenden Debatte über neue Milliardenprogramme.

seien der Chef der Förderbank KfW, Ulrich Schröder, Vertreter von Landes- und Privatbanken sowie Sparkassen, der Präsident der Bundesanstalt für Arbeit, Frank Weise, und einige Wirtschaftswissenschaftler. Ziel sei es, die Ursachen und den Verlauf der weltweiten Rezession zu analysieren. Auch solle diskutiert werden, wie es um die Kreditvergabe in Deutschland stehe. Steinmeier plädierte für ein besonnenes Vorgehen in der Krise. „Wir brauchen langfristige und strukturell wirksame Lösungen, Maßnahmen, die auch wirklich helfen“, sagte der

umstritten. Auch Merkel und Steinbrück, die national und international als Bremser angesehen werden, denken längst über neue Schritte nach, ohne eine klare Antwort gefunden zu haben. Nötig seien Programme, die im nächsten Jahr kurzfristig Arbeitsplätze retten und den Konsum beflügeln könnten, hieß es. Während manche Politiker sofortige Beschlüsse fordern, plädiert Steinbrück dafür, erst im Frühjahr zu entscheiden.

Die deutsche Debatte über weitere Konjunkturlösungen wird befeuert von Nachrichten über Programme im Aus-

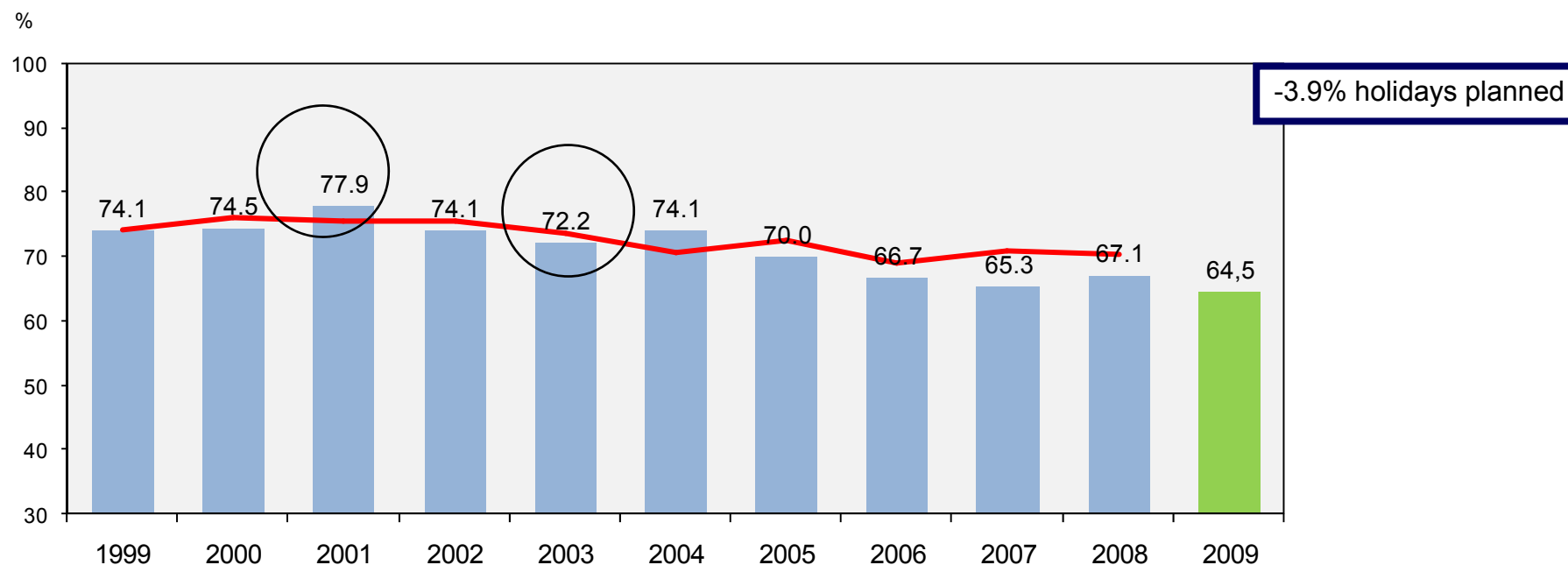
über den EU-Gipfel in dieser Woche ab. In Deutschland kamen aus der Koalition weitere Vorschläge für ein zweites Konjunkturpaket. Wirtschaftsminister Glos plädierte erneut für Steuerenkun gen, von einigen zum linken Flügel gerechneten SPD-Politikern kam der Vorschlag eines Milliarden-Investitionsprogramms.

Lehrerverbände und Hochschulrektoren begrüßten den Vorschlag von Bundesbildungsministerin Annette Schavan (CDU), den Schulen und Universitäten 4,6 Milliarden Euro für Renovierungsarbeiten zu zahlen und so die Konjunktur

HOLIDAY PLANS 1996 – 2009

Approx. 2/3 plan to take at least one extended holiday in 2009

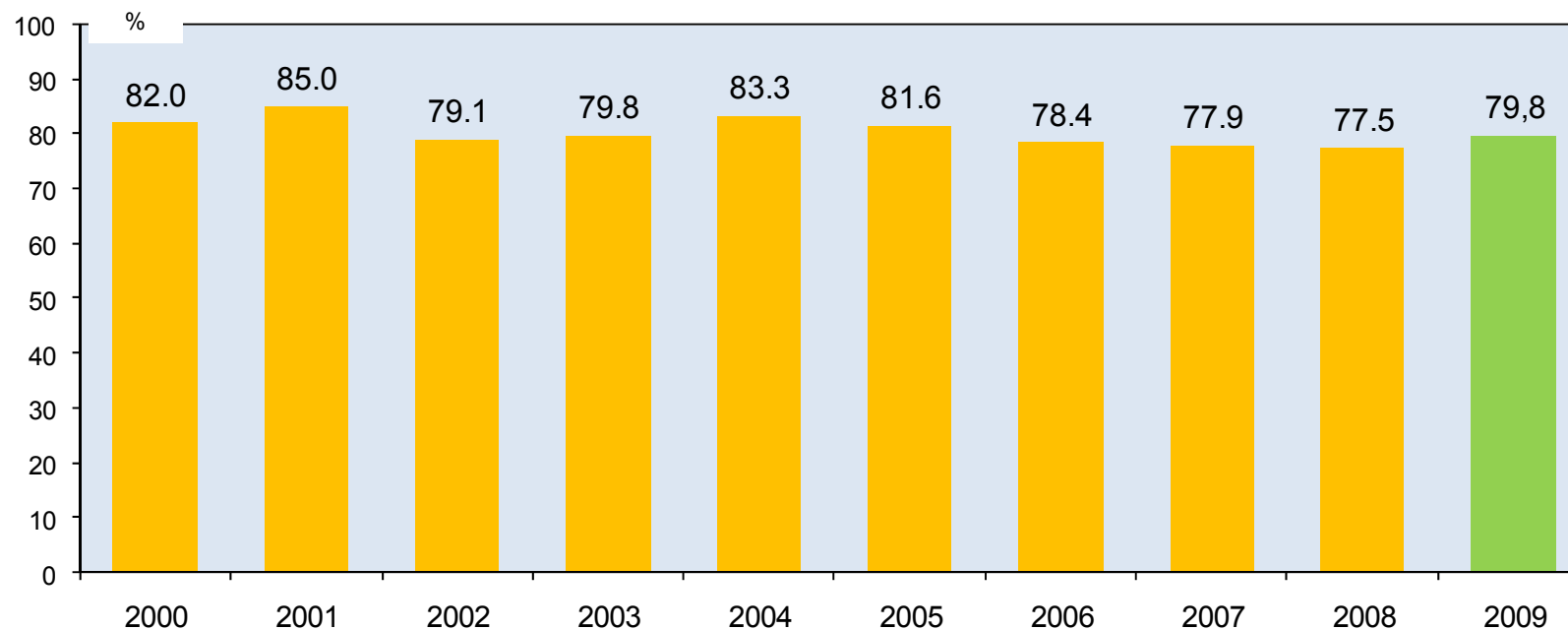
Since 2005, the number of people planning to take holidays has been slightly lower than that of holiday-makers.



■ Holidays taken ■ Holidays planned

holiday-makers planning to take an extended holiday next year

Quota of regular holiday-makers remains constantly high





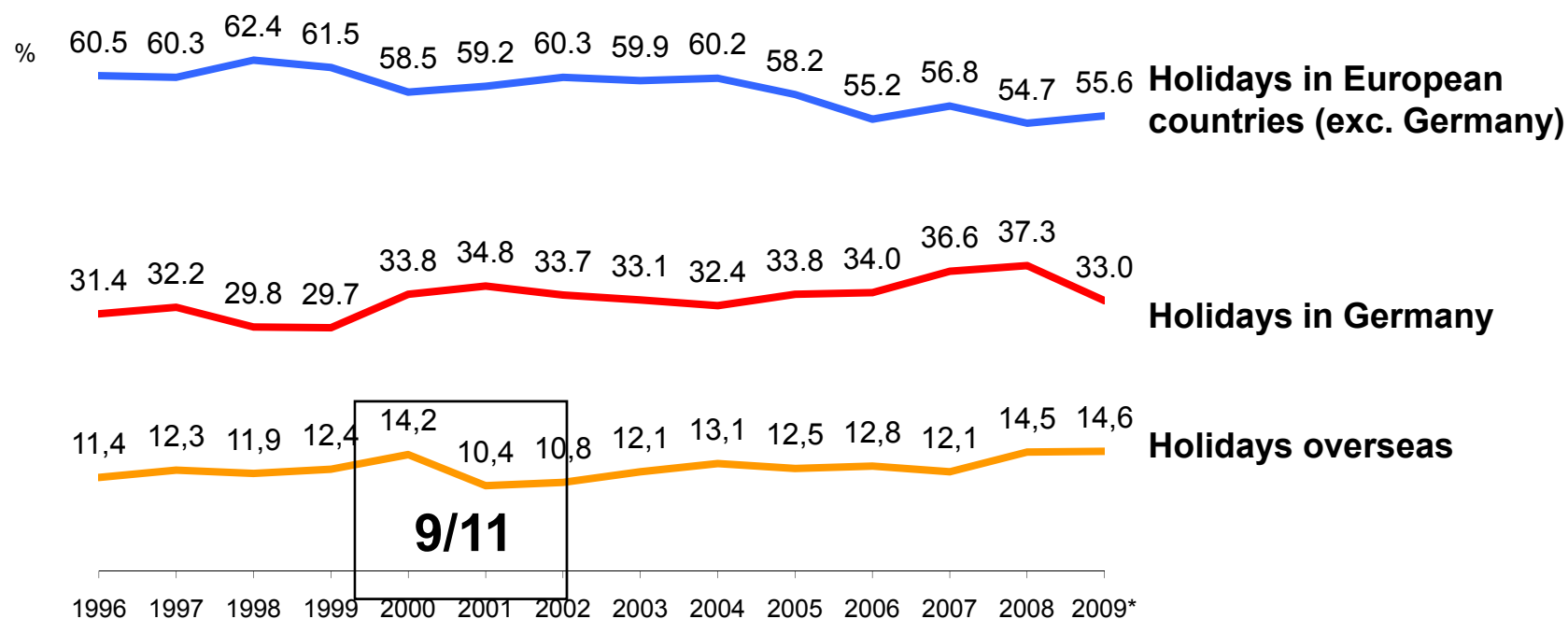
2009 destinations

- Quo vadis?
- Tops and flops



Holiday travel 1996 – 2009*

Fewer domestic holidays planned

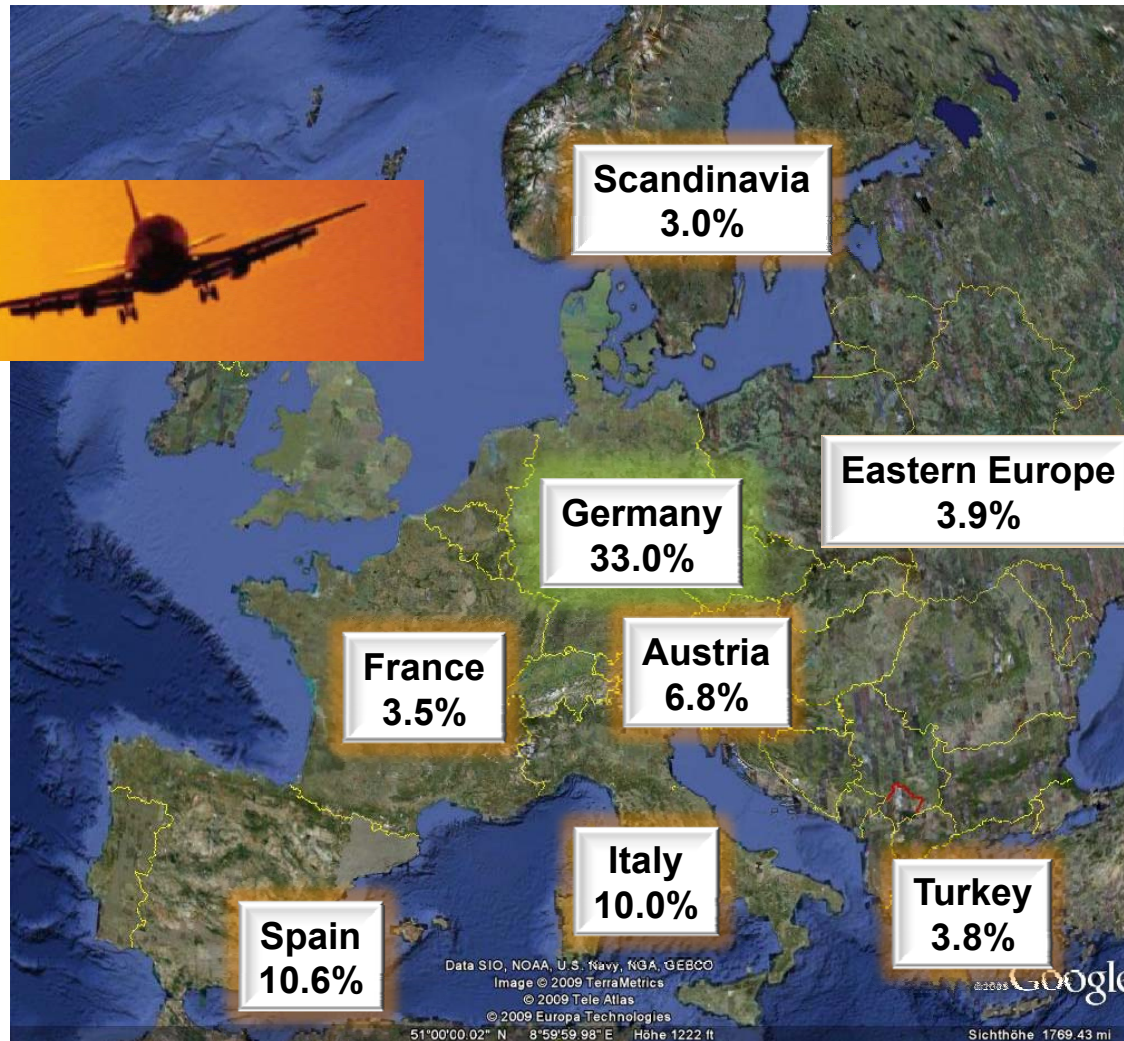
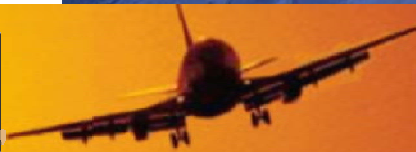


Multiple responses were possible.

2009 Flow of holiday-makers

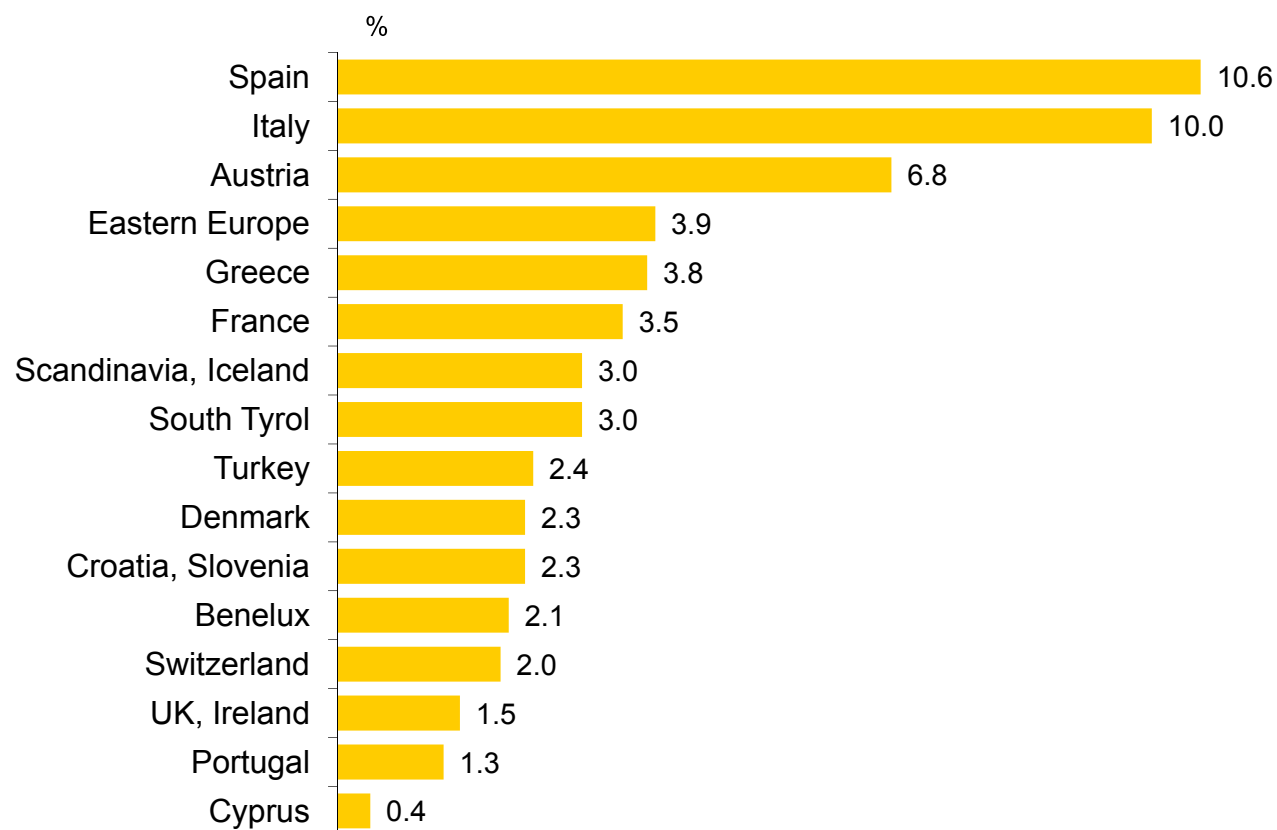


Overseas
travel 14.6%

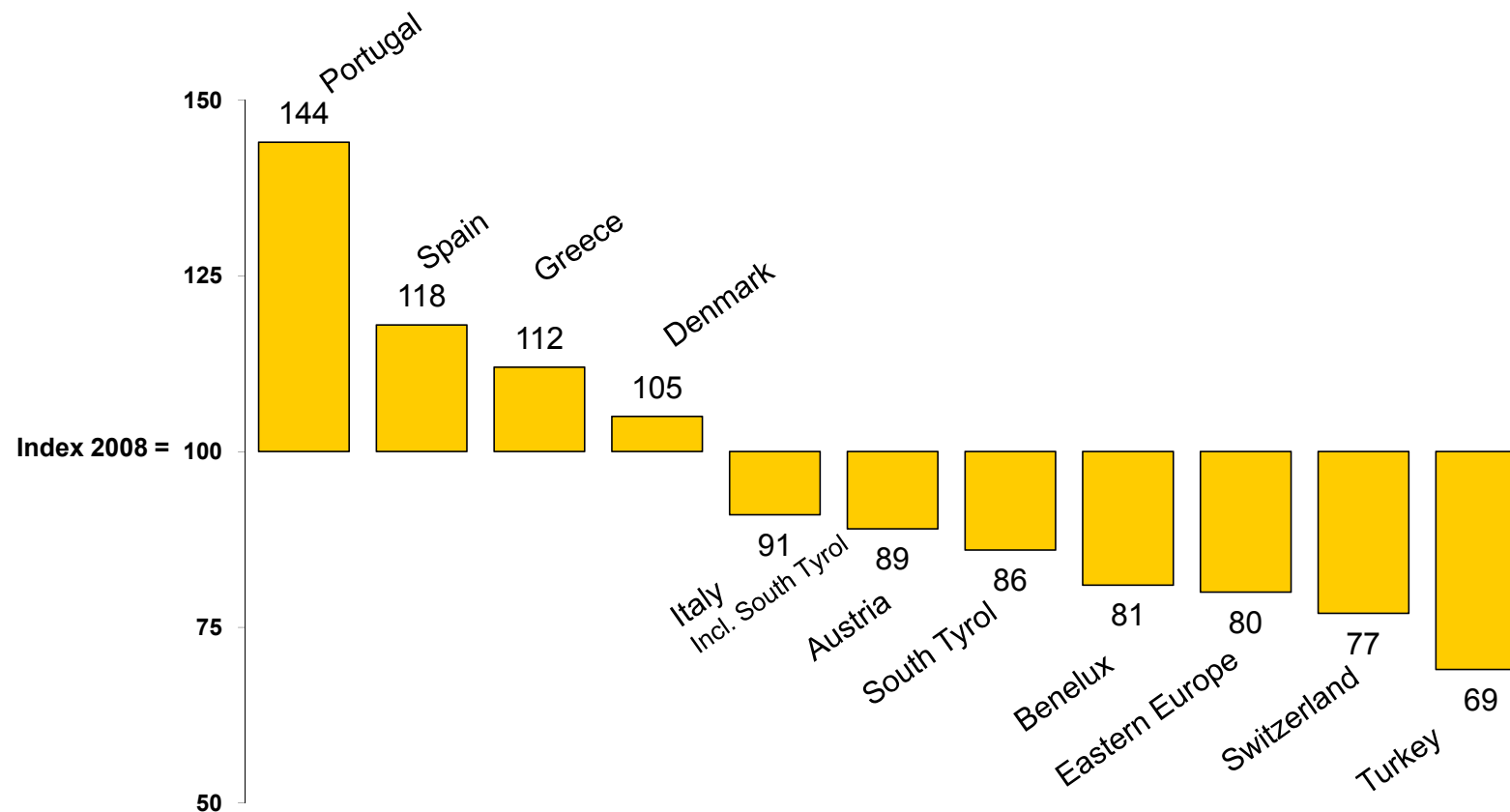


2009 Planned holidays EUROPEAN COUNTRIES (exc. Germany)

Spain back at the top

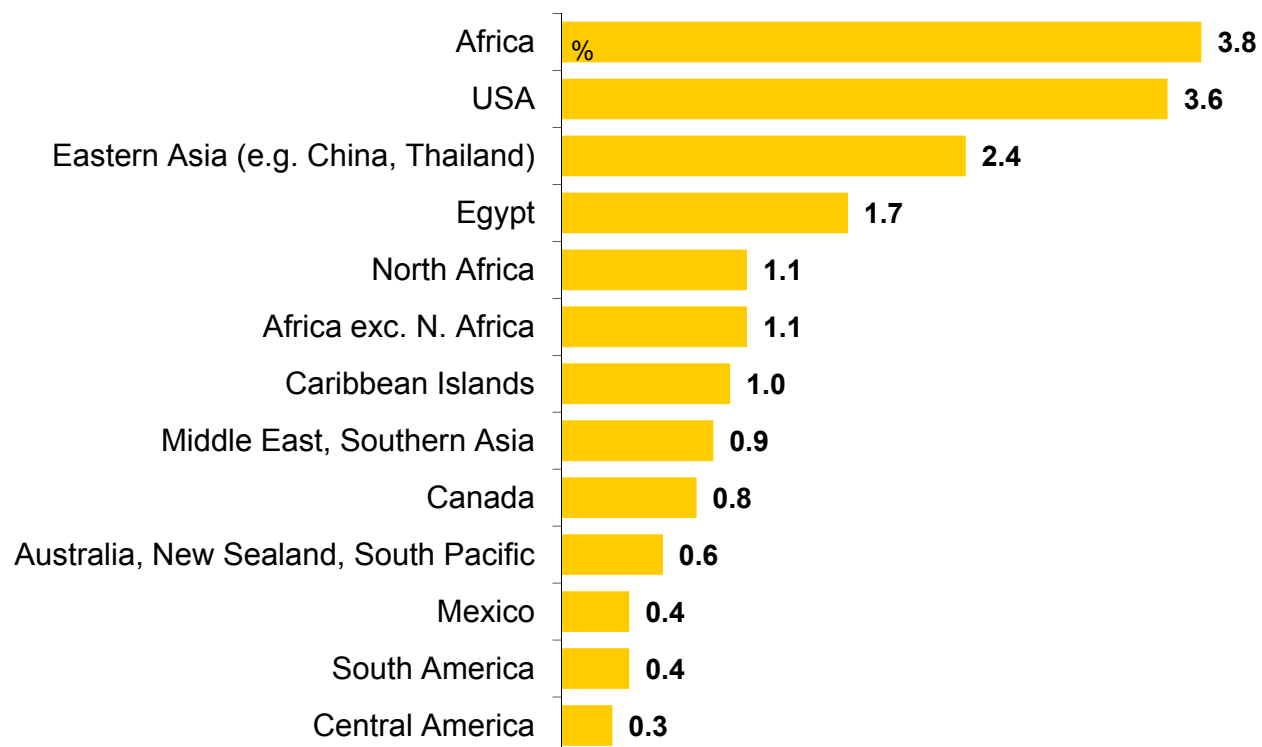


2009 Flow of holiday-makers compared to the previous year European countries exc. Germany

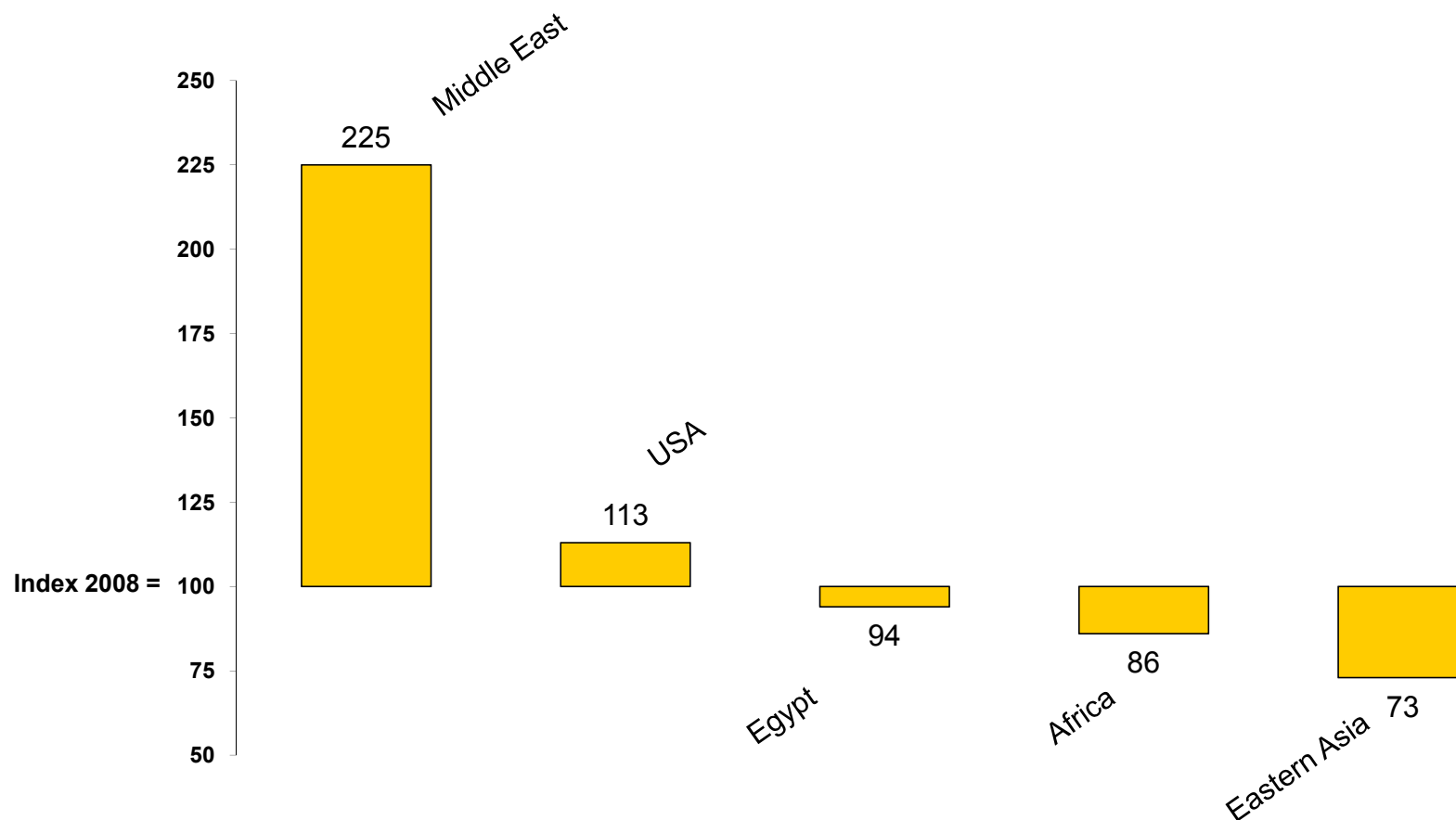


2009 Planned holidays – OVERSEAS TRAVEL

The USA remains single most popular destination

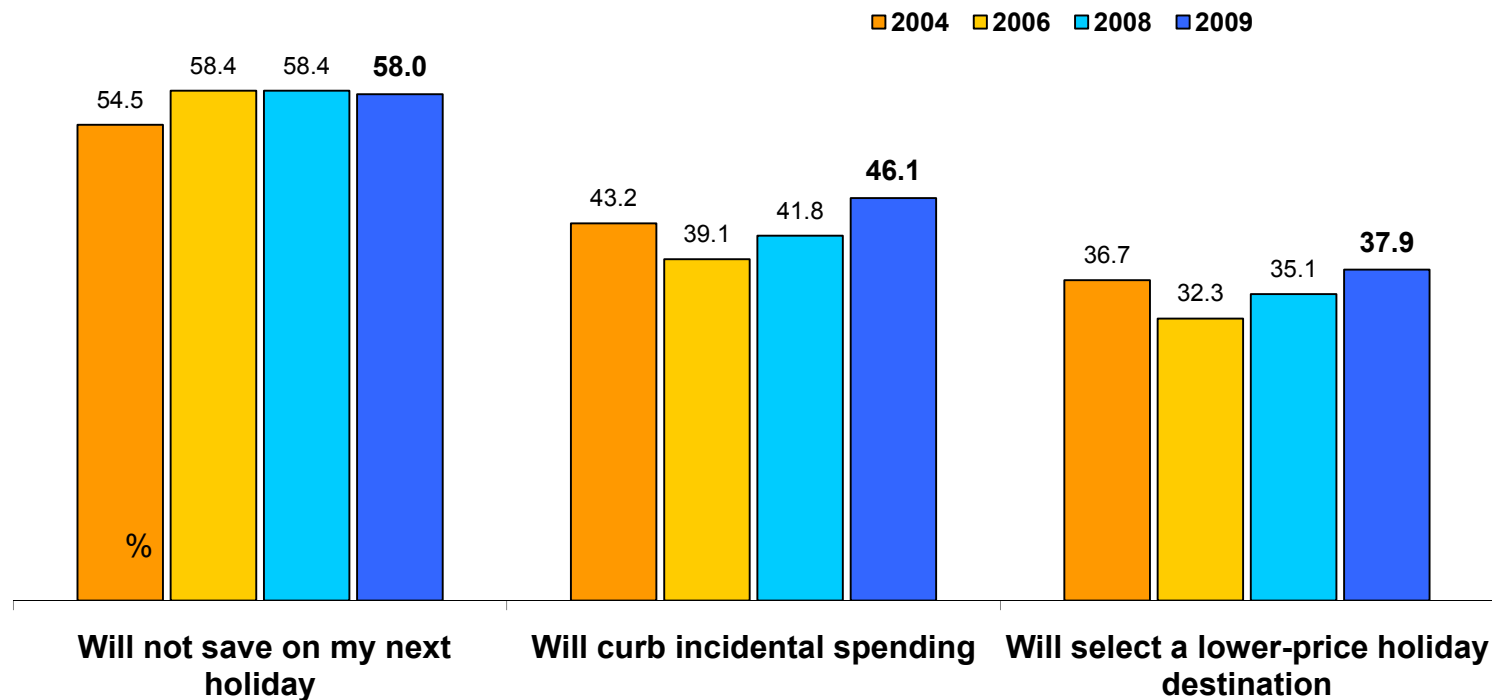


Flow of holiday-makers – overseas travel 2009 tops and flops



Saving vs. not saving on holidays 2004 - 2009

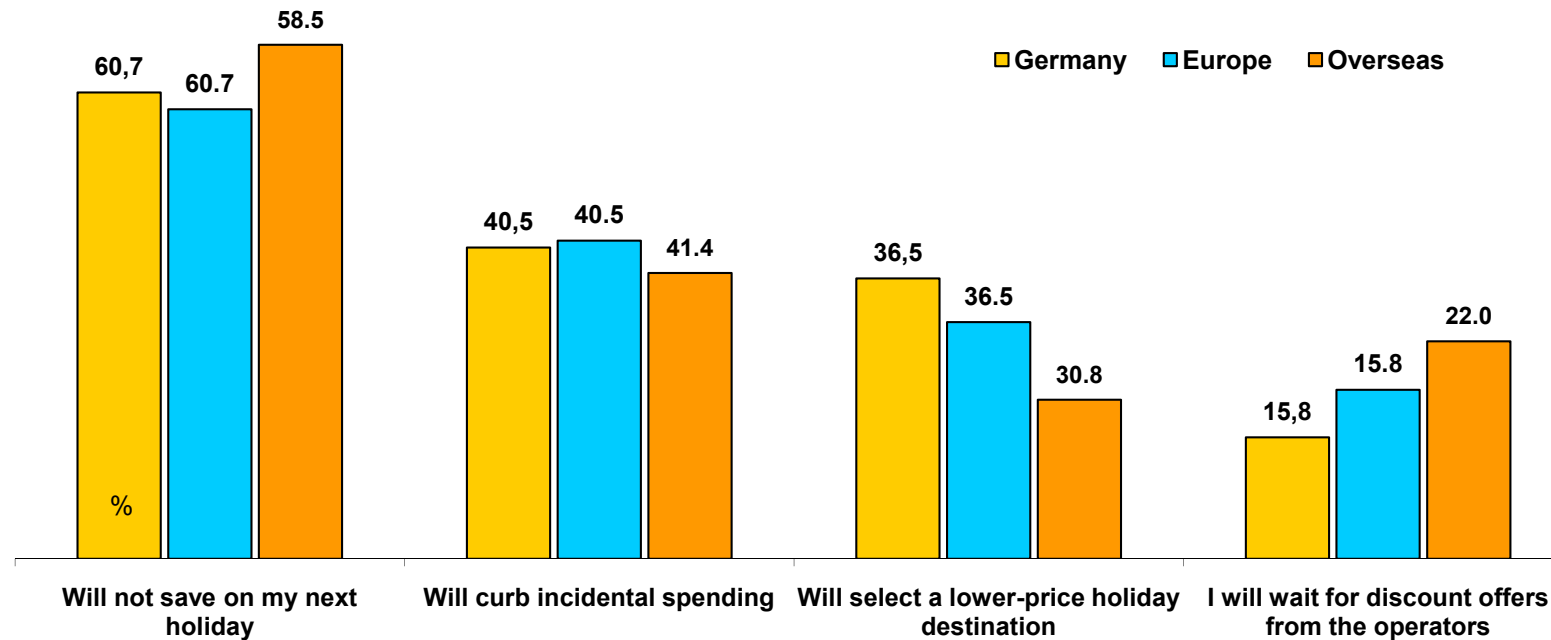
holiday-makers are no exception when it comes to economies
Low-price destinations more and more popular



*true/absolutely true

2009 Saving vs. not saving on holidays by destinations

Overseas travellers look for operators' discount offers

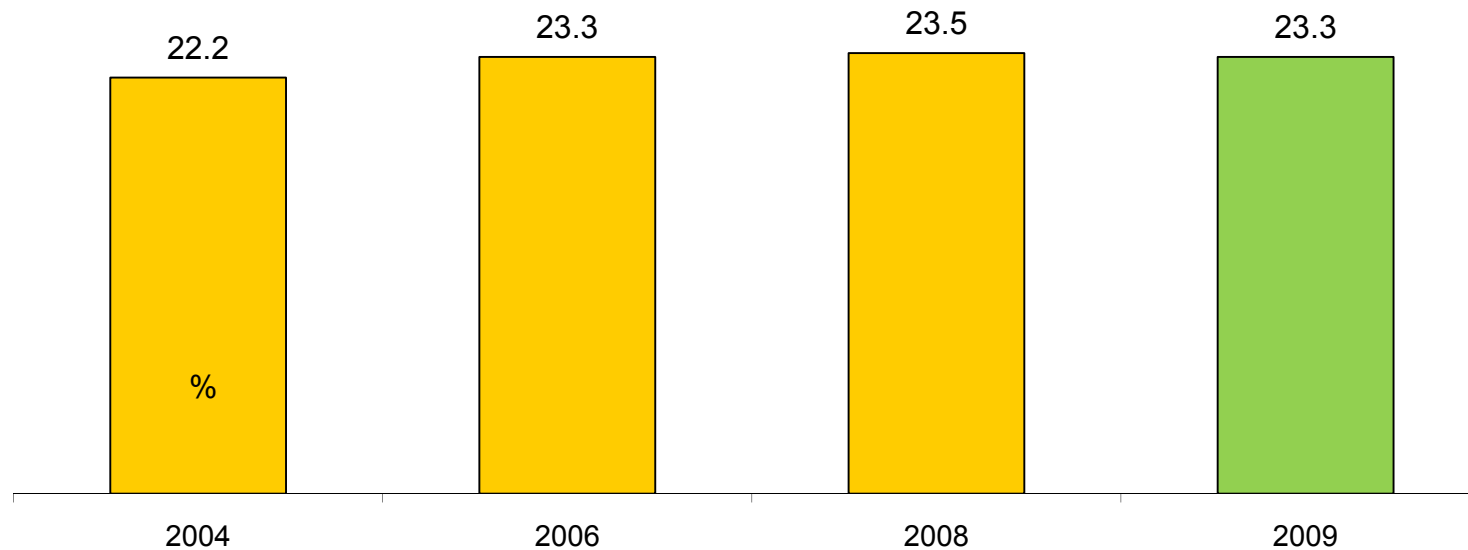


*True/absolutely true

Saving vs. not saving on holidays 2004 – 2009

¼ of all holiday-makers are interested in operators' discount offers

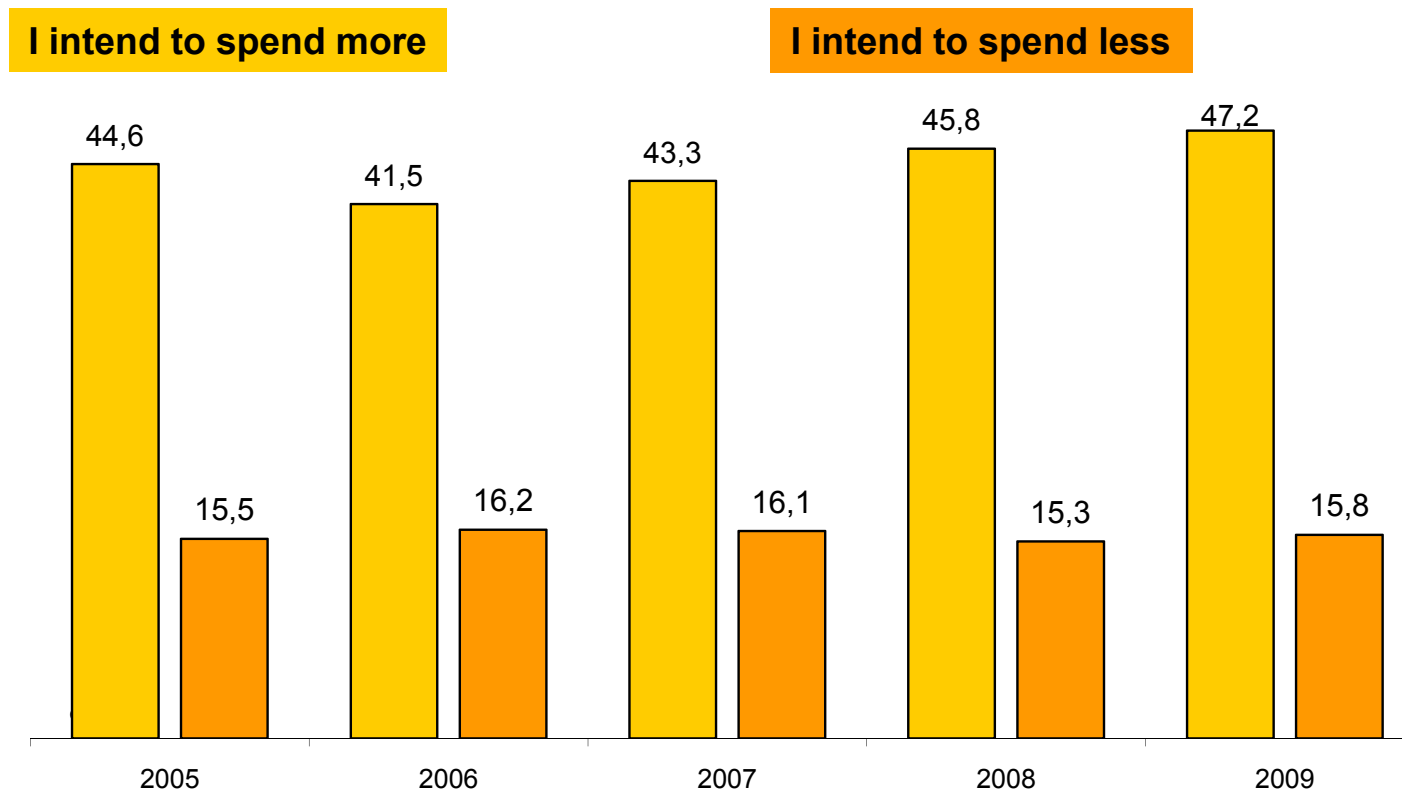
I will wait for operators' discount offers



*True/absolutely true

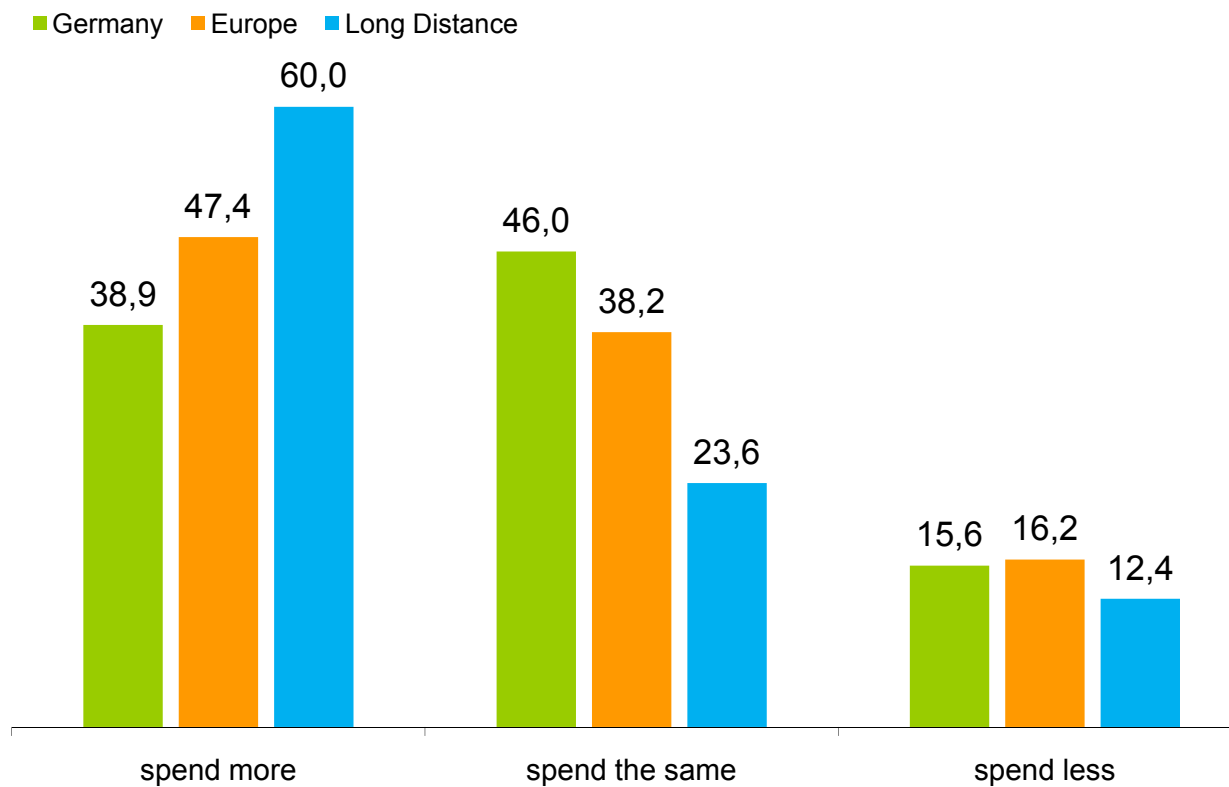
TRENDS IN HOLIDAY SPENDING

Every other holiday maker intends to spend more on their 2009 holiday



TRENDS IN HOLIDAY SPENDING

$\frac{2}{3}$ of all overseas travellers expect higher holiday spending

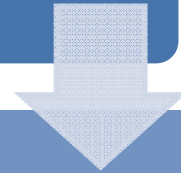


Decision making processes

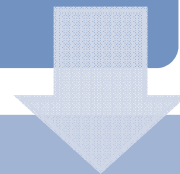
- Planning lead times
- Booking accommodation

Decision-making processes involved in holiday planning

Which country?



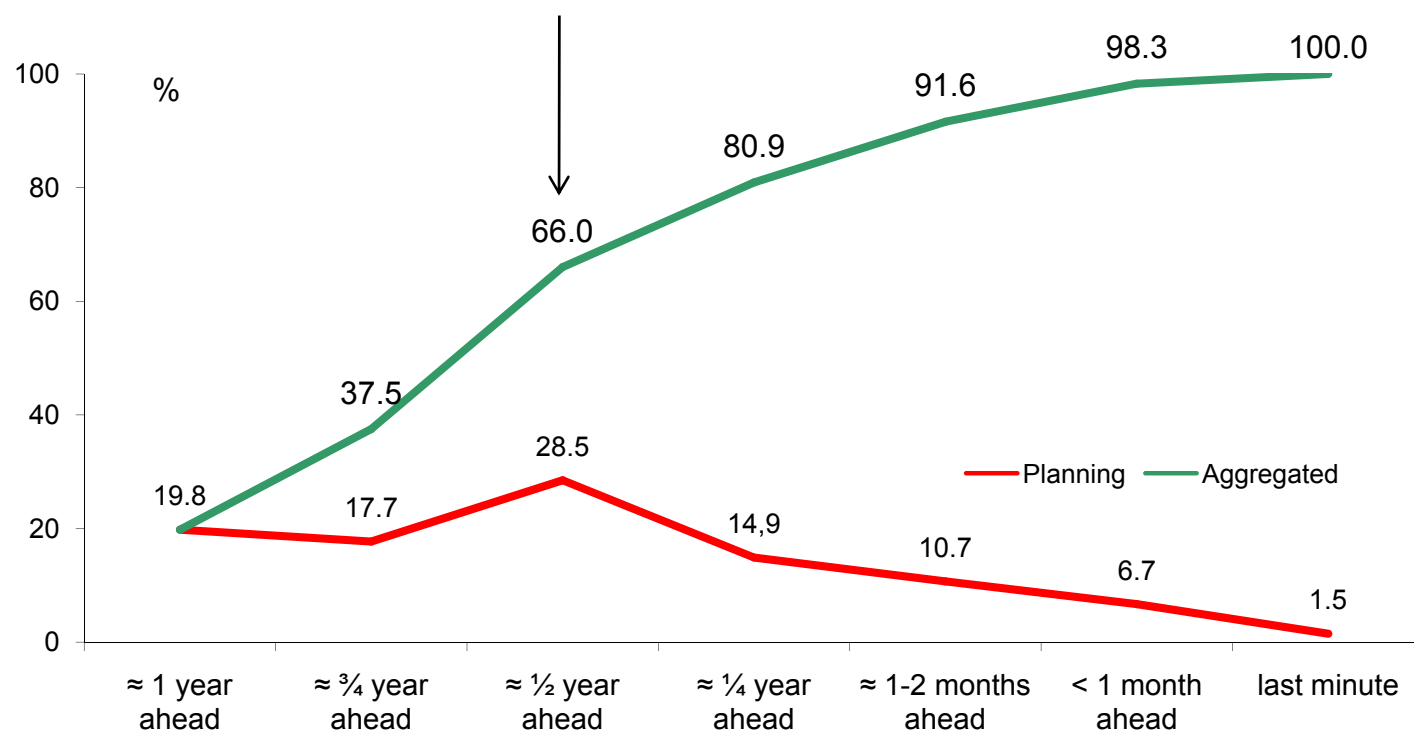
Which destination?



What type of
accommodation?

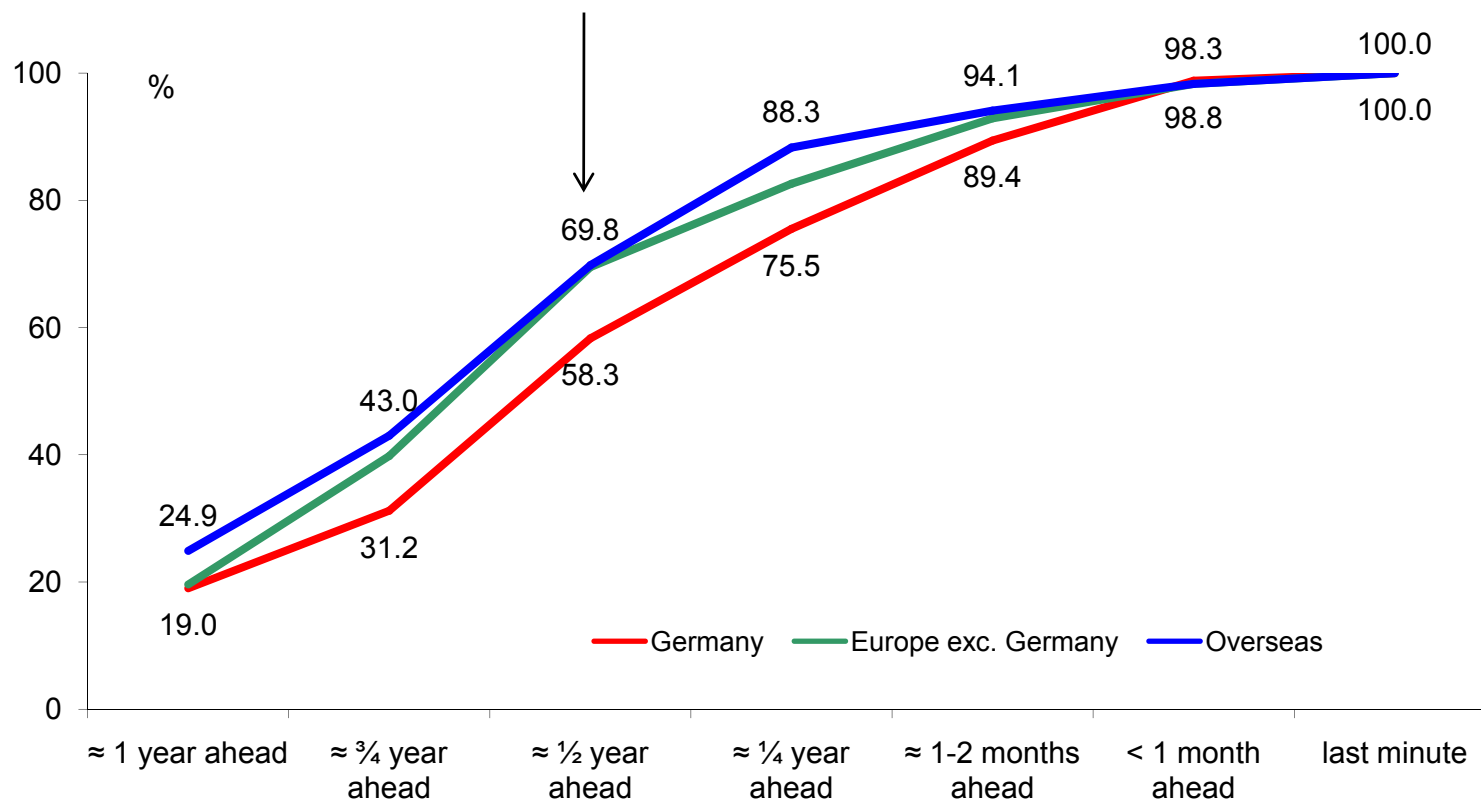
Preliminary planning

2/3 of all holiday-makers start planning their holiday at least 1/2 year ahead



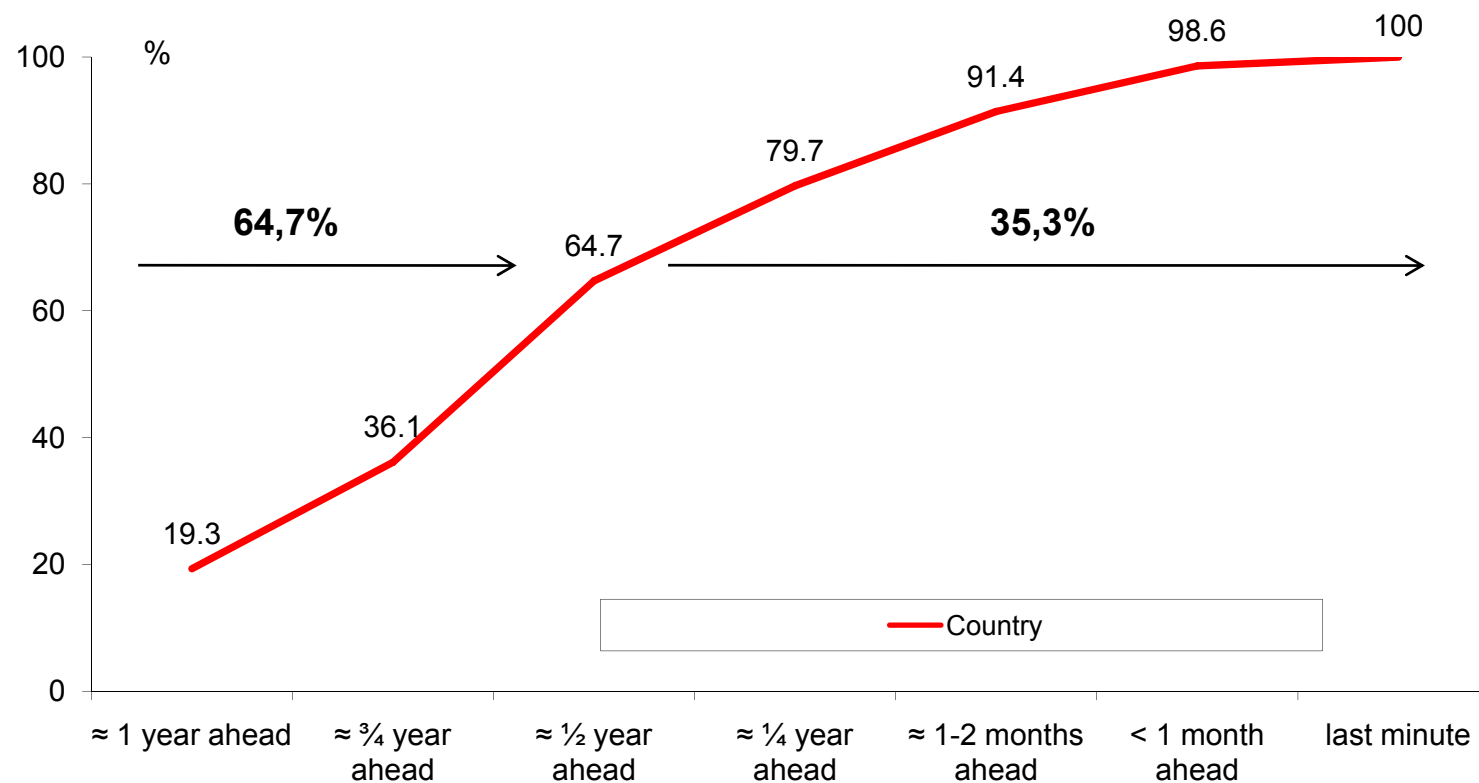
Preliminary planning

70% of all overseas travellers start planning their trip at least ½ year ahead



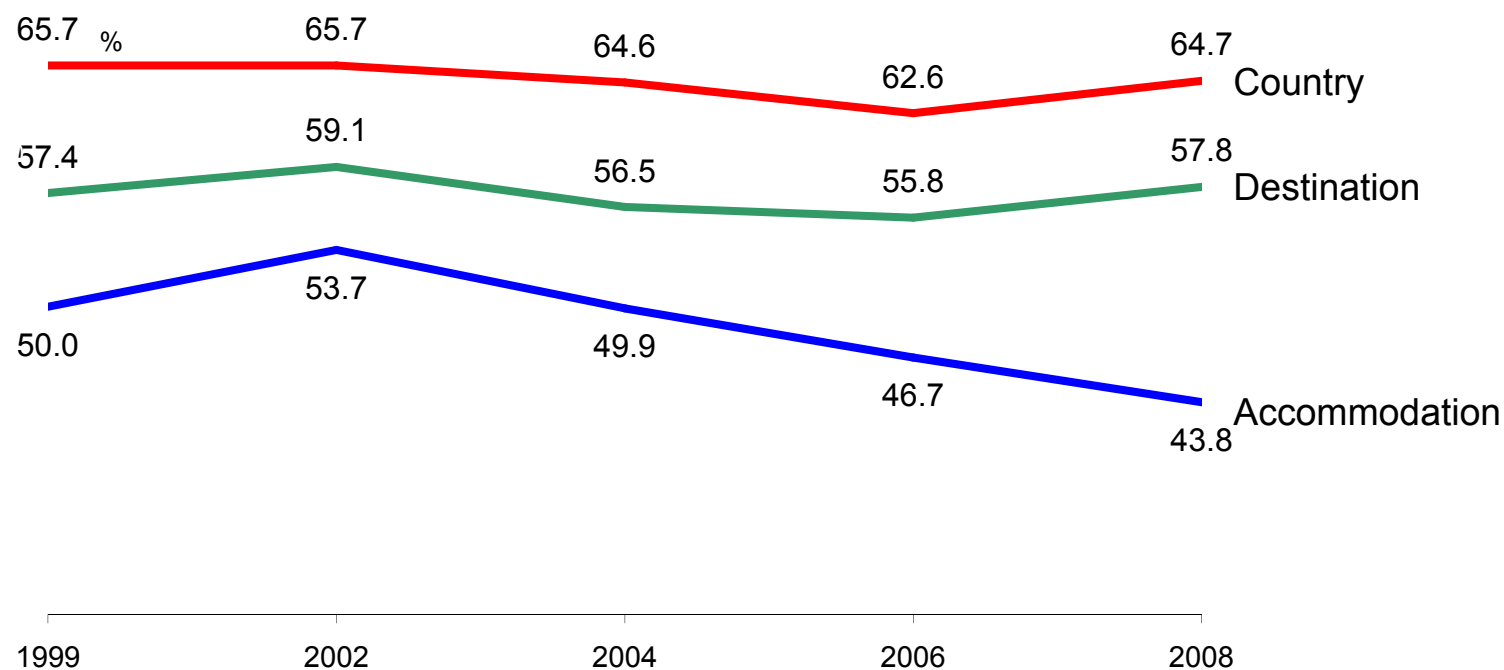
Decision-making lead times

65% choose their holiday country ½ year ahead



Decisions made ½ year ahead 1999 – 2008

More and more holiday-makers postpone the decision about their accommodation



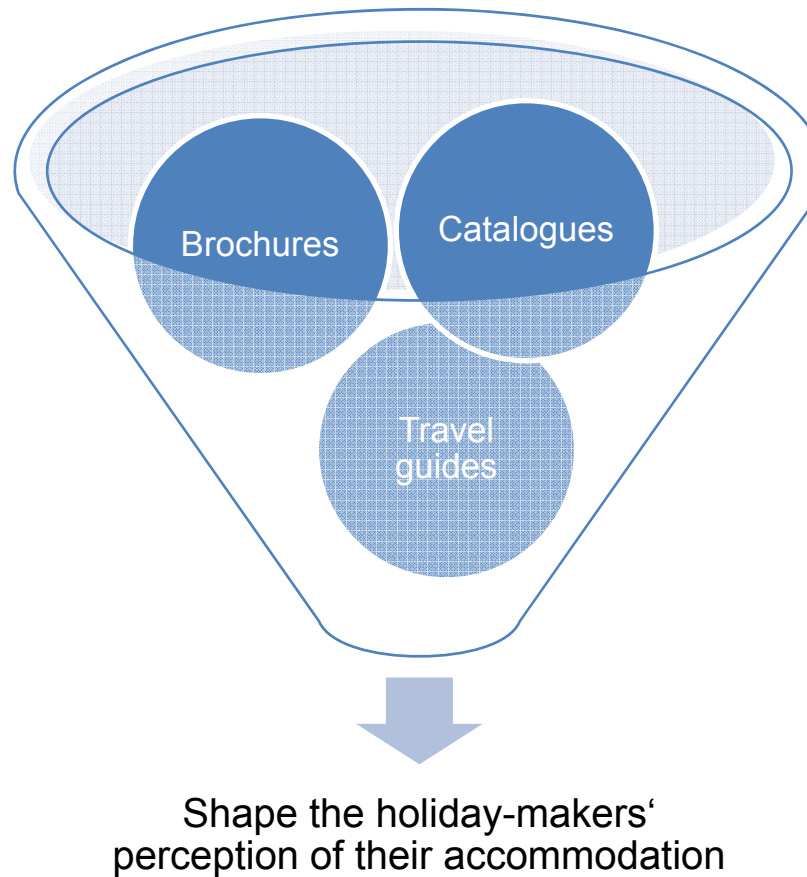
Intermediate results

More chances than risks for the Tourismusindustrie

- **Approx. 2/3 plan to take at least one extended holiday in 2009**
Since 2005 plans and realization differ slightly
- **Quota of regular holiday-makers remains constantly high**
- **Holiday in Germany on first place, loosing by the plans**
- **Spain back at the top**
- **Overseas travel are winning again**
- **The USA remains single most popular destination**
- **holiday-makers are no exception when it comes to economies**
Low-price destinations more and more popular
- **Overseas travellers look for operators' discount offers**
- **Every other holiday maker intends to spend more on their 2009 holiday**
- **2/3 of all overseas travellers expect higher holiday spending**

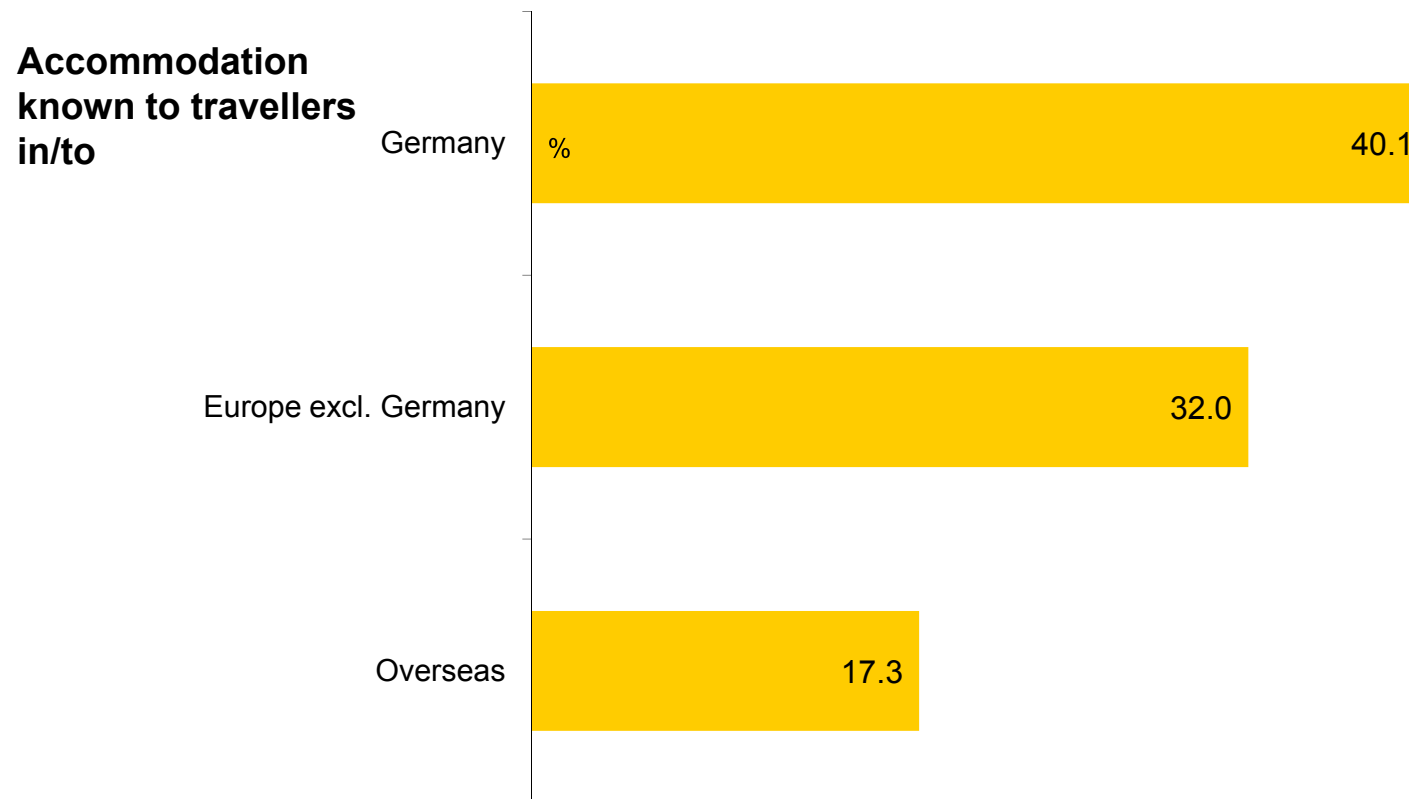
*geplant

Decision-making aids involved in holiday planning



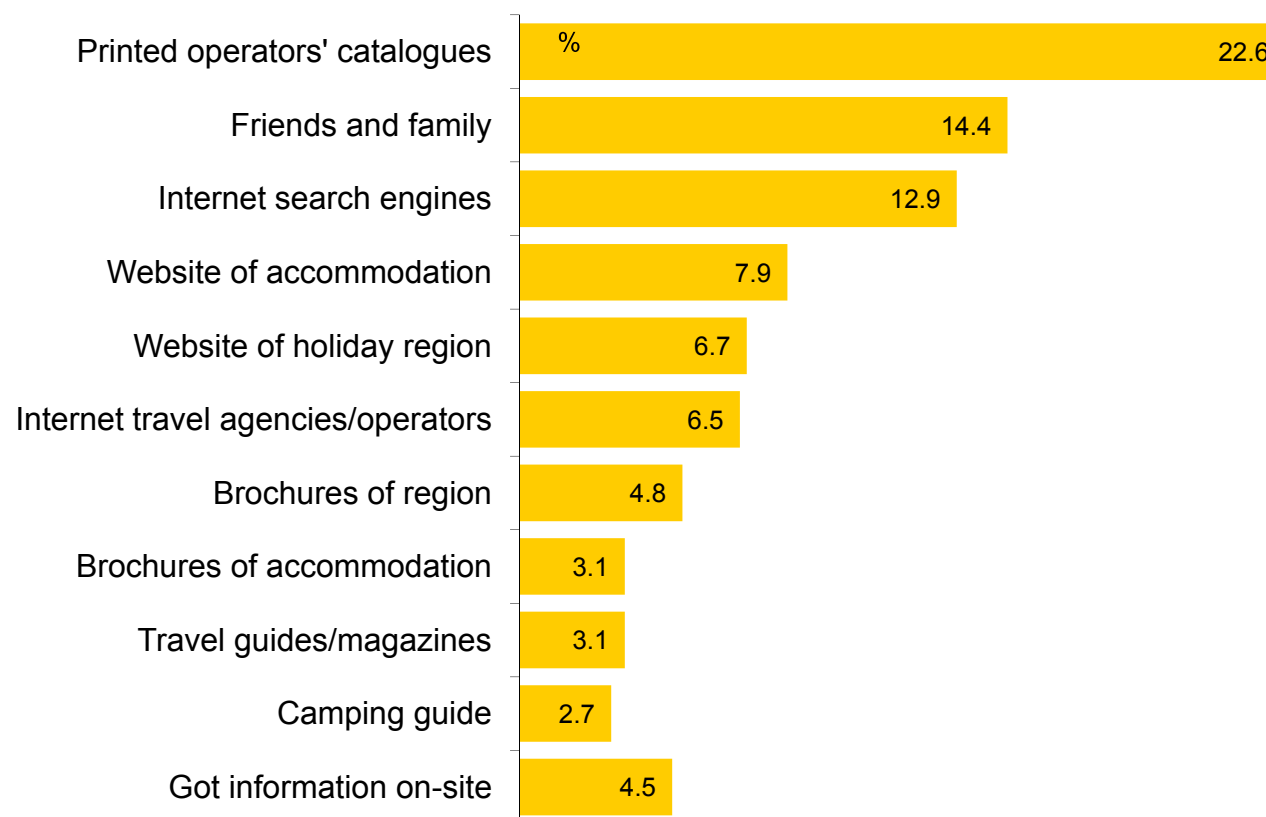
Sources of information for selecting accommodation

40% of domestic holiday-makers in Germany knew their accommodation before



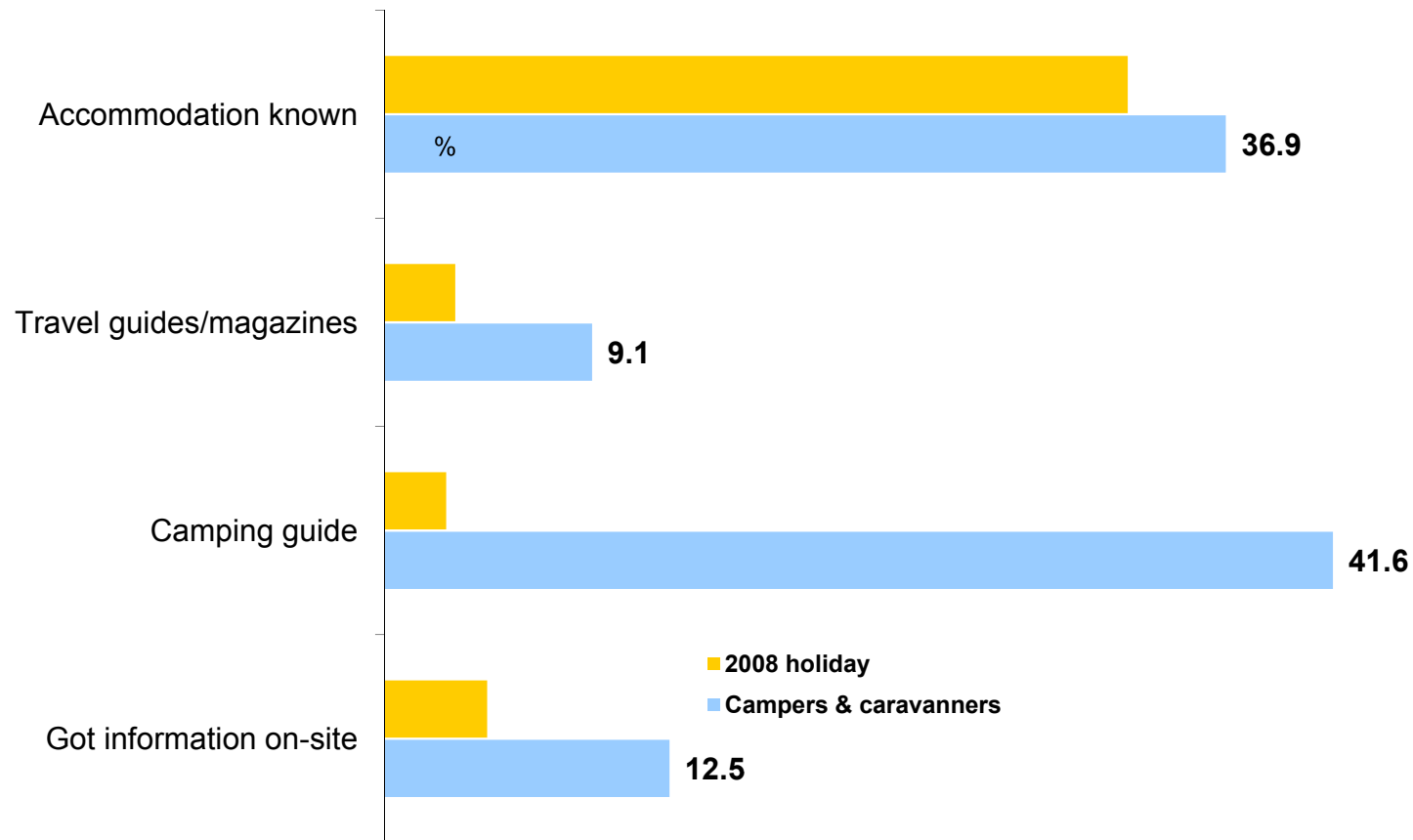
Sources of information for selecting accommodation

Operators' catalogues remain important



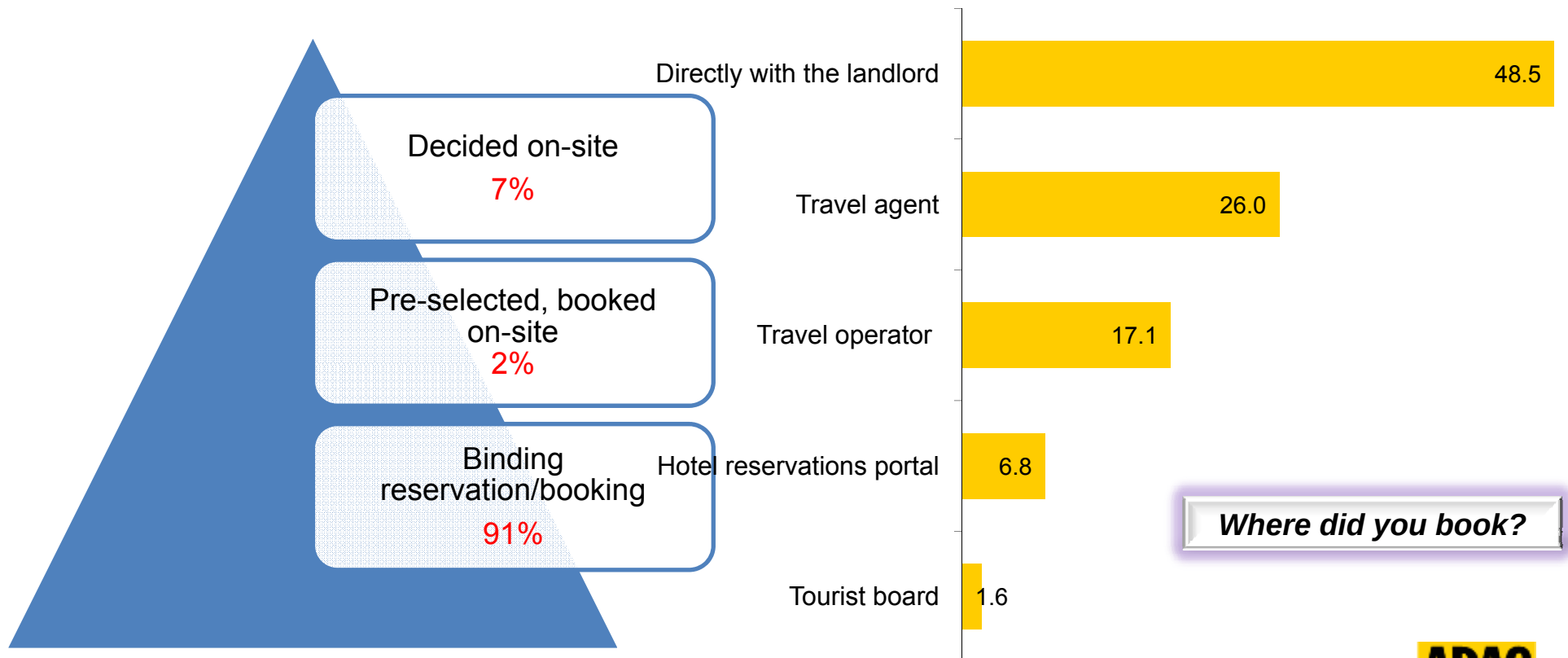
Sources of information for selecting accommodation Campers & caravanners

Camping guide is most important



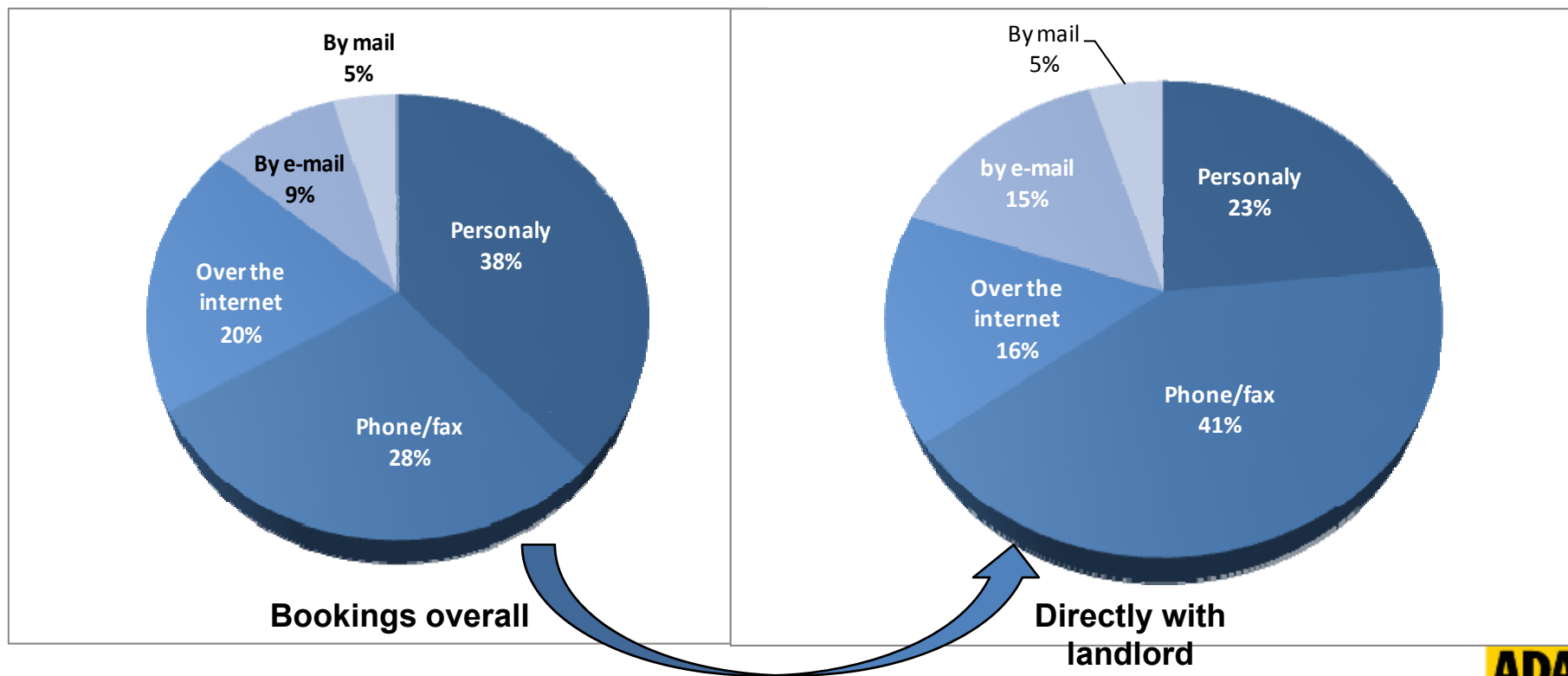
Booking trends: accommodation

91% have made reservations



Booking trends: accommodation

Only a minority uses electronic media

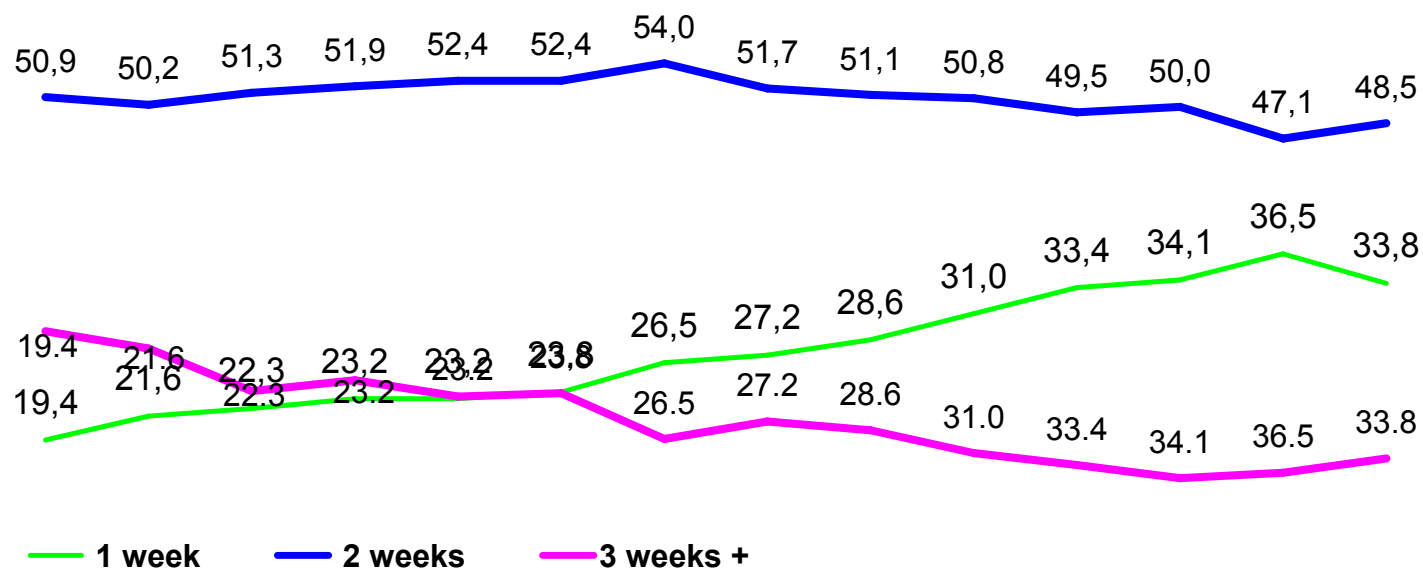


Holiday-related decisions

- Duration
- Travel seasons
- Accommodation
- Self-organised or package?
- Drive or fly?

HOLIDAY DURATION 1995 – 2008

Two-week holidays remain the holiday duration of choice
The proportion of longer holidays has been picking up since 2007

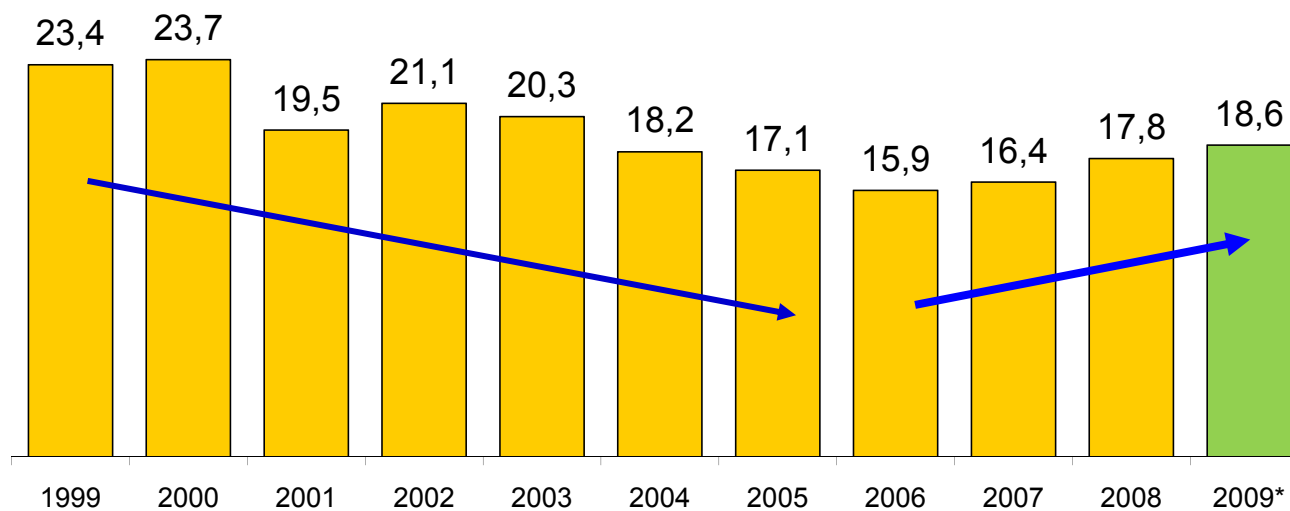


* planned

2009* HOLIDAY DURATION

Longer holidays continue gaining in popularity

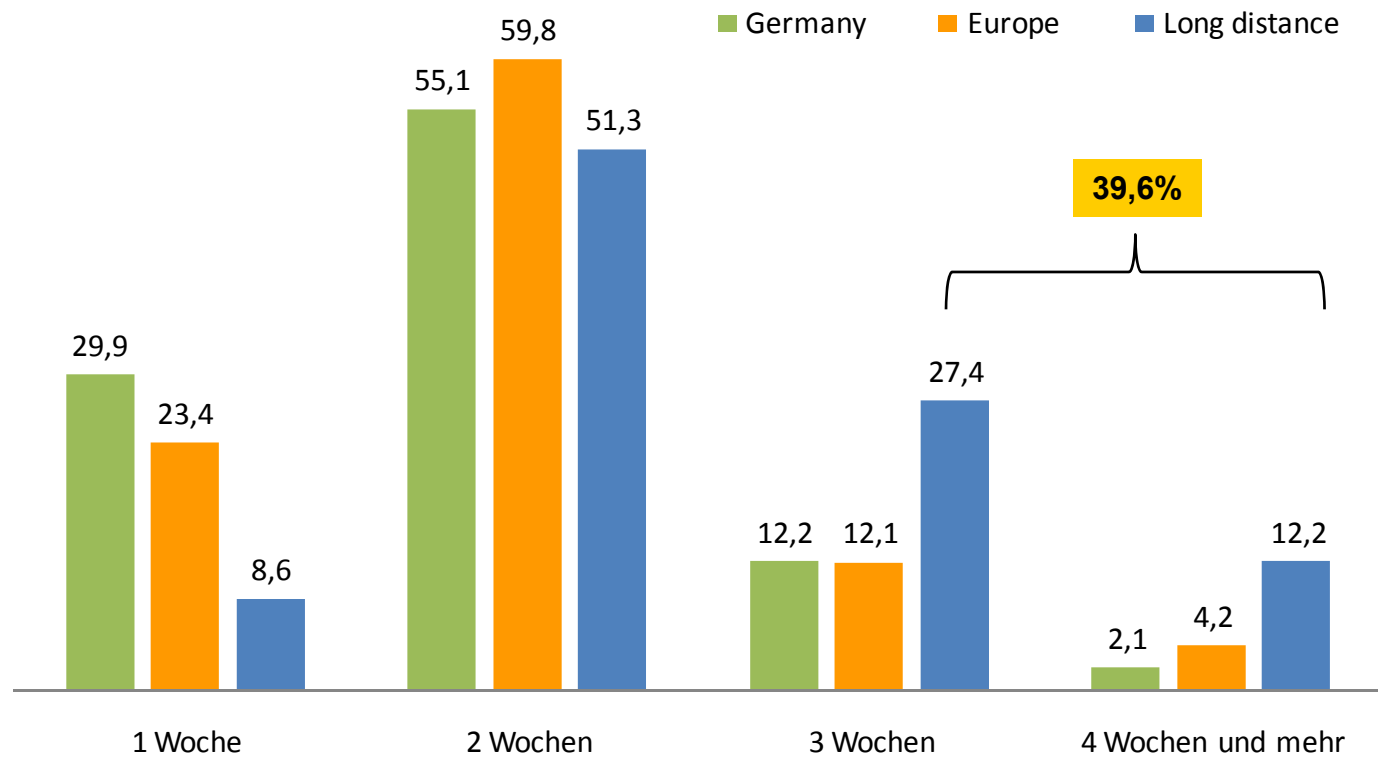
Percentage of 3 weeks+
holidays



* planned

HOLIDAY DURATION

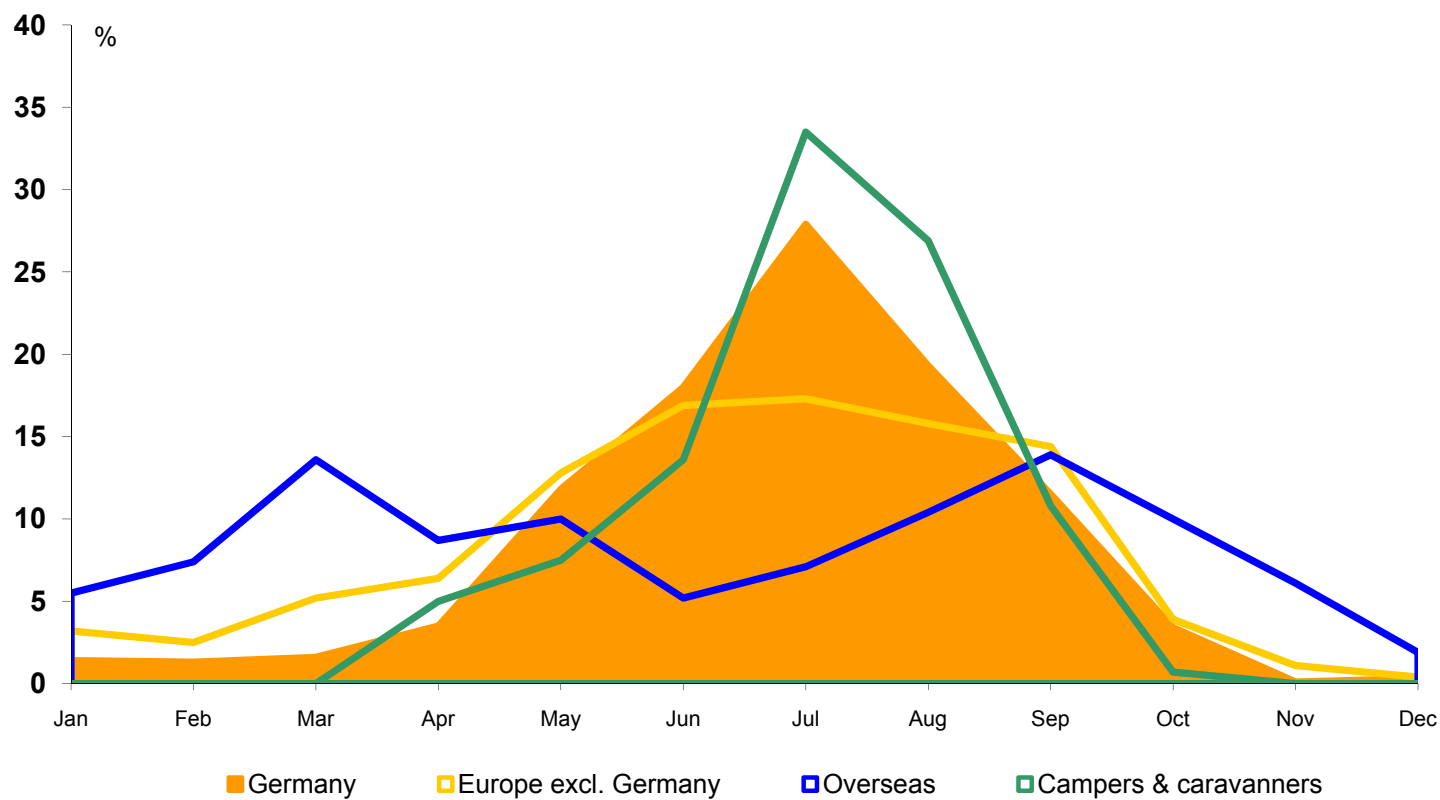
Holidays in overseas destinations tend to be longer



* planned

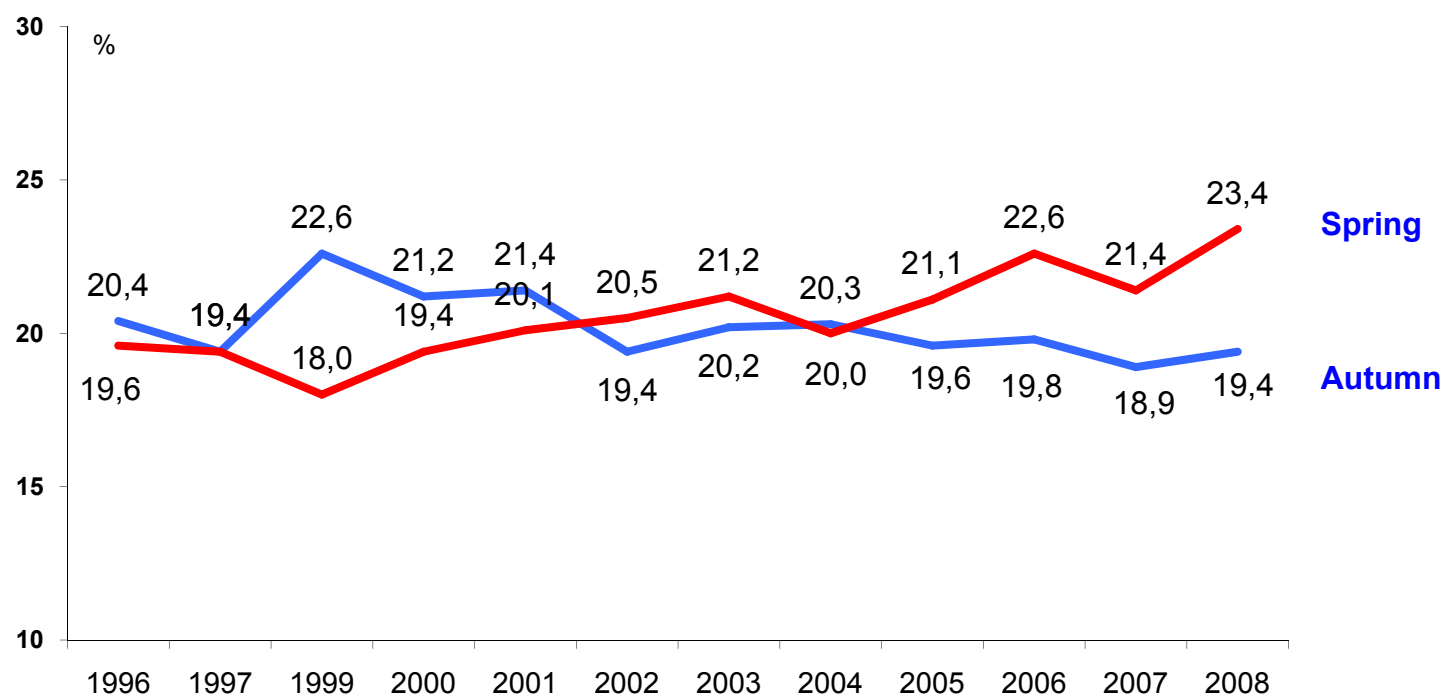
2008 TRAVEL SEASONS BY DESTINATION

Germans travel throughout the year



HOLIDAY SEASONS

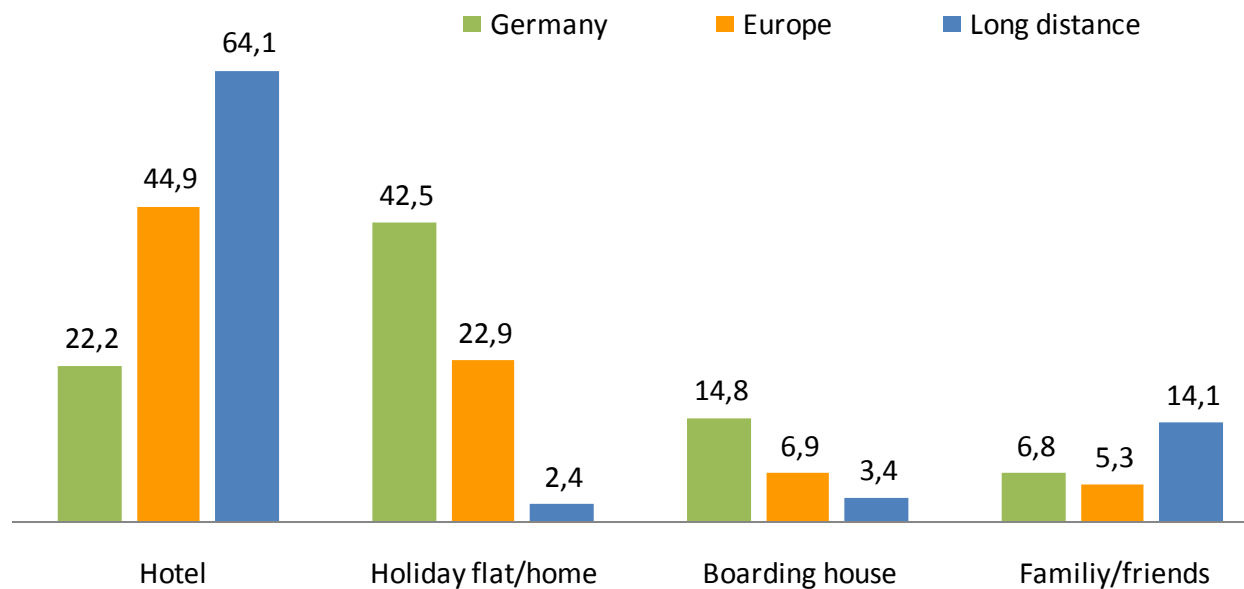
Spring becomes increasingly popular



* planned

ACCOMMODATION

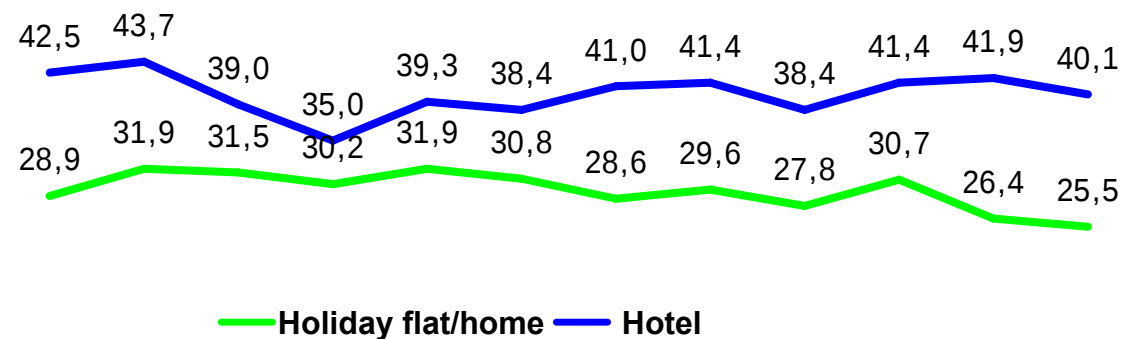
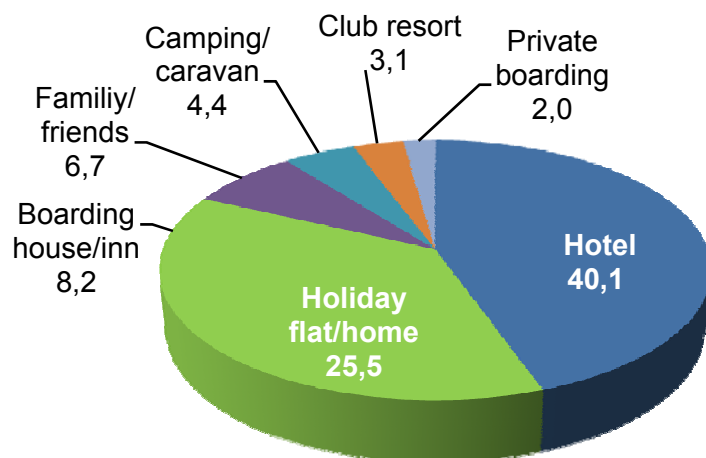
In 2009, **hotels** will be the accommodation of choice of travellers to Europe (excl. Germany) and overseas



*planned

ACCOMMODATION

Hotels will remain the no. 1 accommodation in 2009*



*planned

ACCOMMODATION

Cruise, club resorts and hotels are part of expensive holidays

Spendings
2.000 € +

- Cruise **Index 200**
- Club resort **Index 169**
- Hotel **Index 125**
- Caravans **Index 105**

Spendings
1.000 – 1.999 €

- Holiday flat **Index 119**
- Boarding house **Index 116**
- Caravan **Index 111**
- Camping **Index 104**

Spendings
less 1.000 €

- Family/friends **Index 208**
- Boarding house **Index 151**
- Private boarding **Index 156**

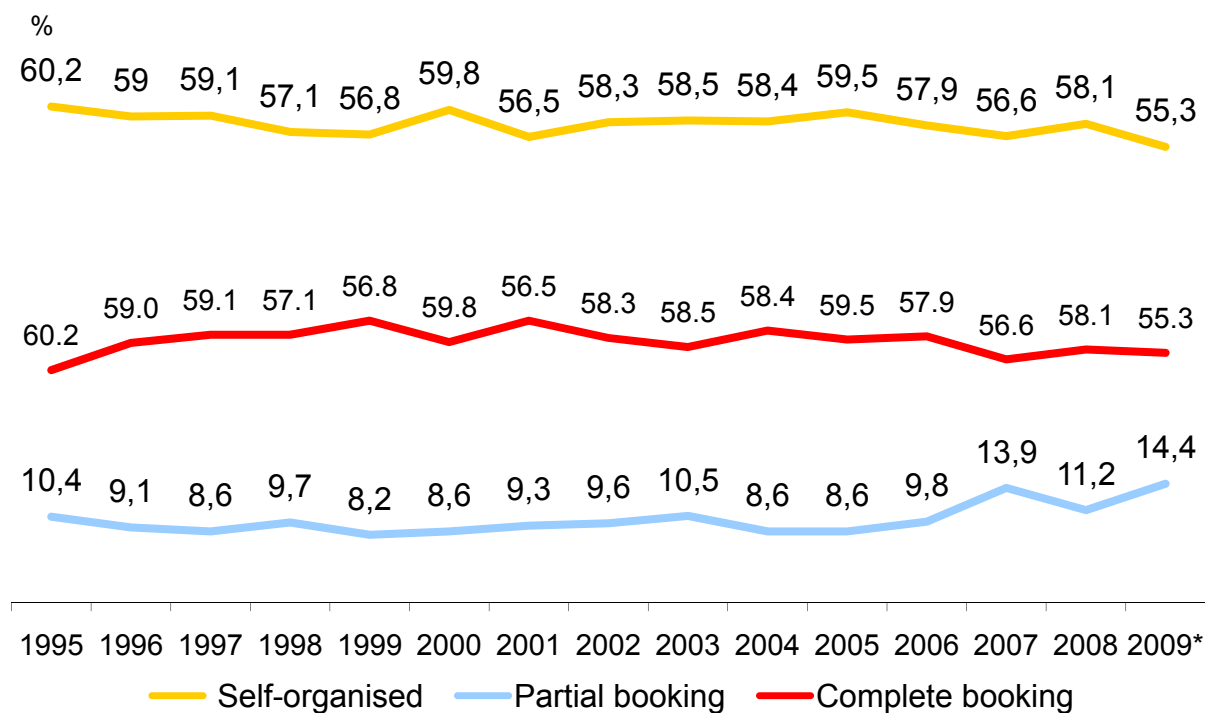
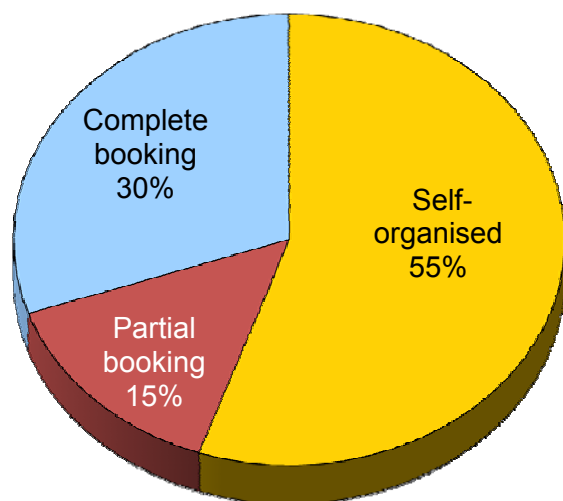
*planned

ADAC

Holiday organisation

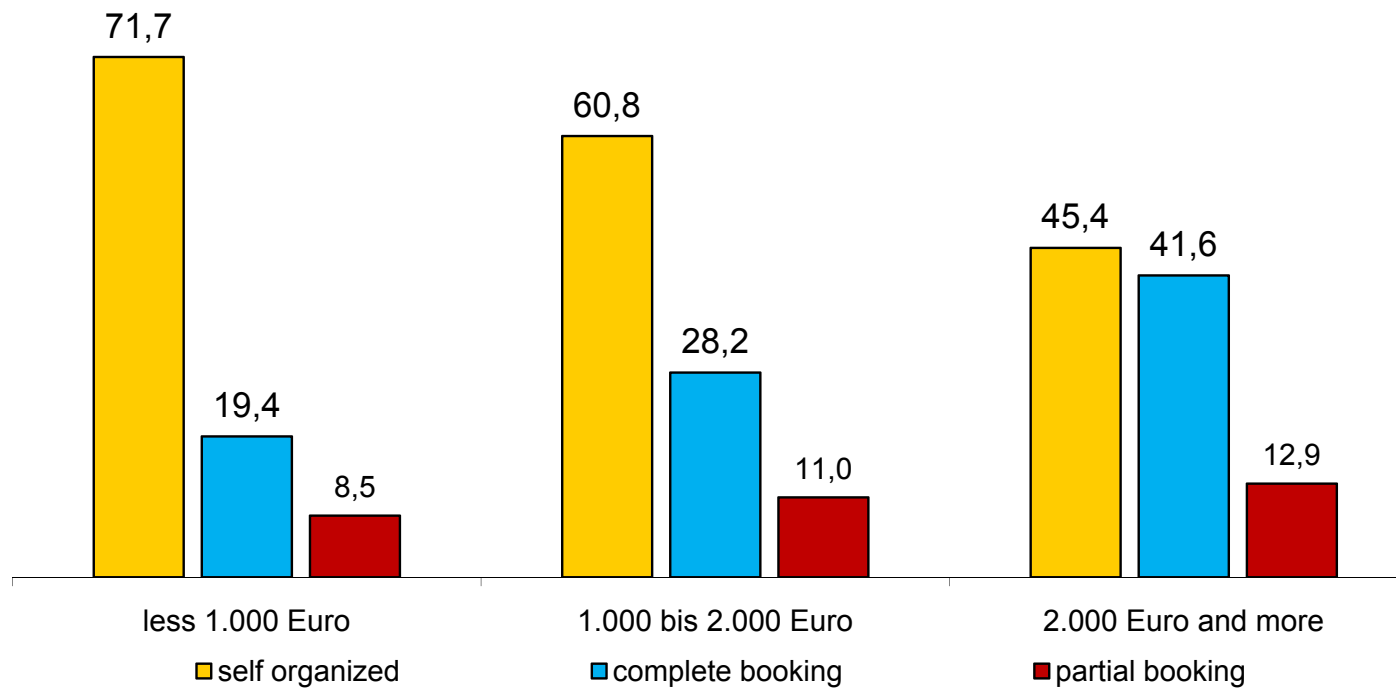
Partial bookings more and more popular

Organisation of planned
2009 holidays



HOLIDAY ORGANISATION

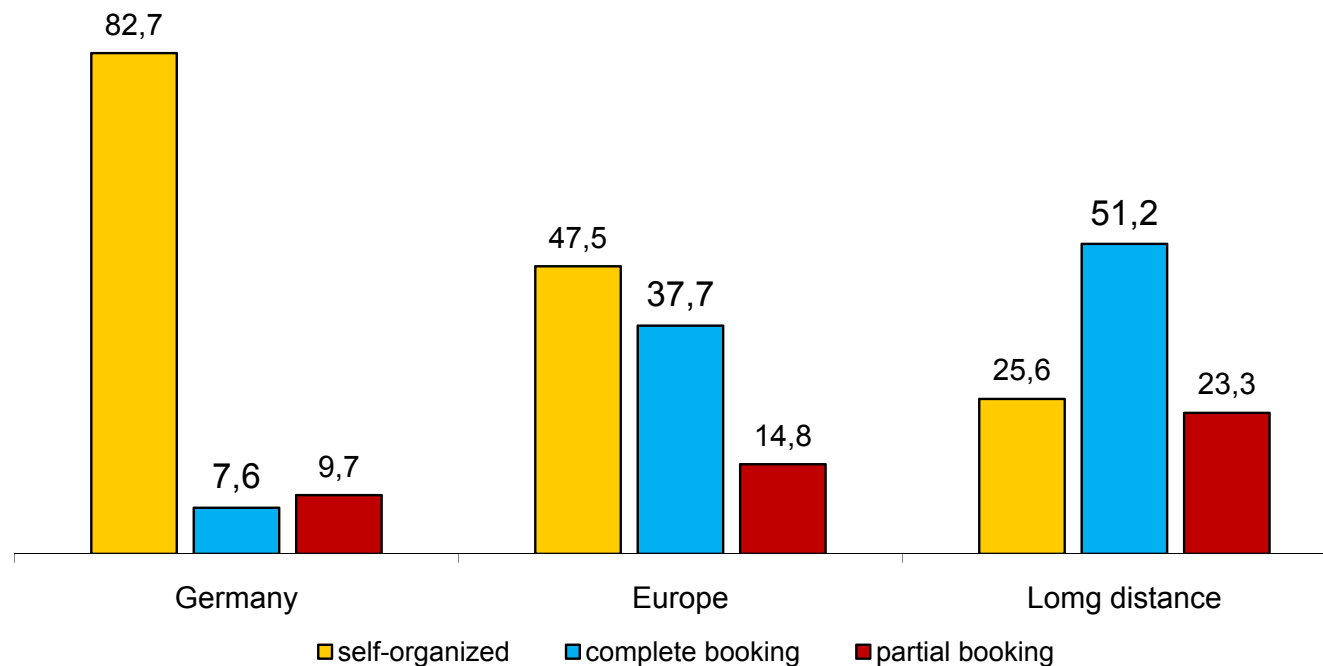
72% of all self-organised holiday trips cost less 1.000 €



* planned

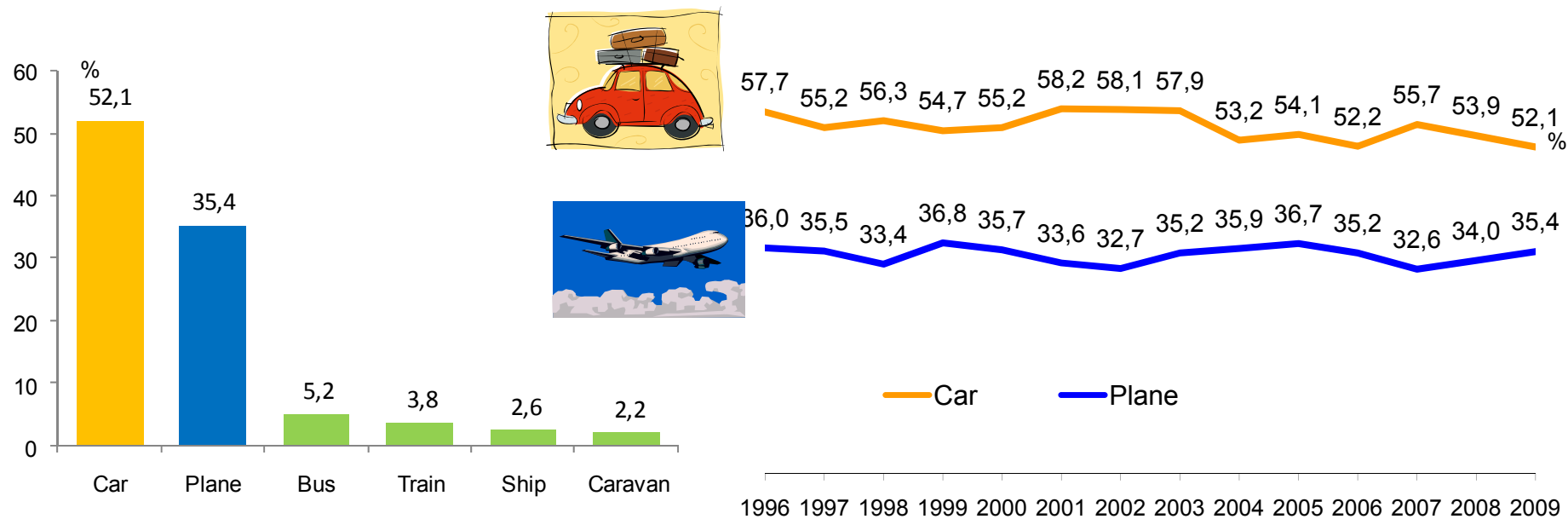
HOLIDAY ORGANISATION

74.5% of all **overseas travellers** make complete/partial bookings
82.7% of all domestic holiday-makers in Germany are self-organised



2009* HOLIDAY MODE OF TRANSPORT

Number of holiday-makers using their car back to 2006 levels.

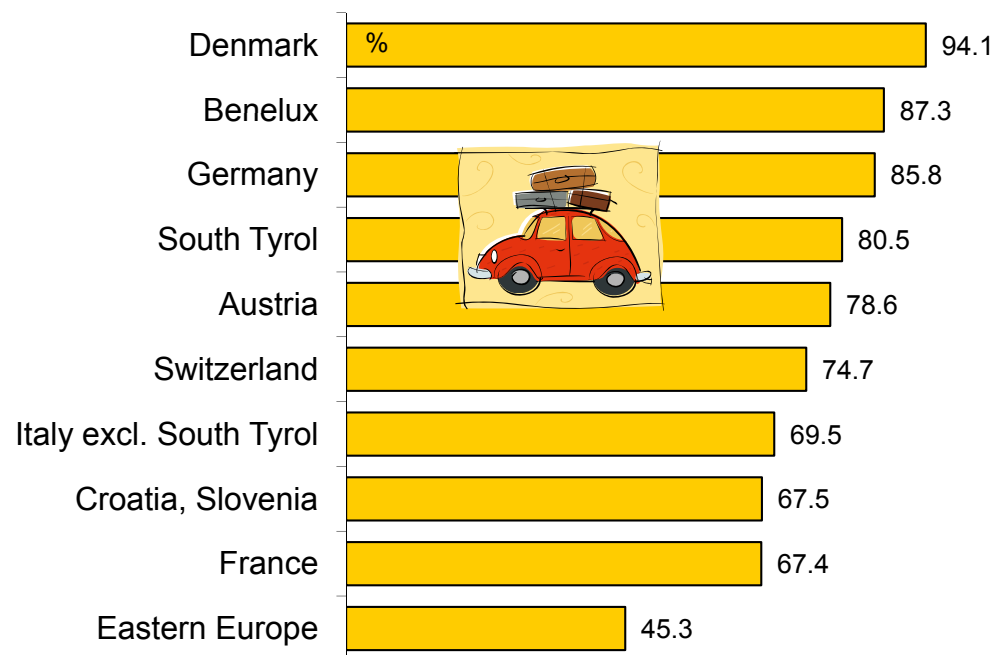


* planned

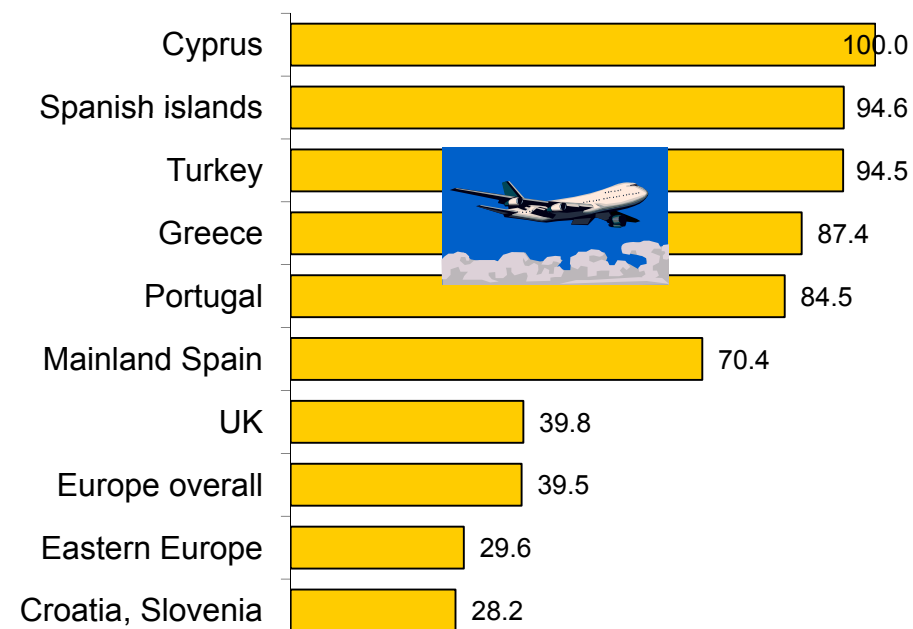
MODE OF TRANSPORT for travel to European destinations

Destinations in Denmark, Benelux and Germany are most often reached by car

Top 10 car travel destinations



Top 10 air travel destinations



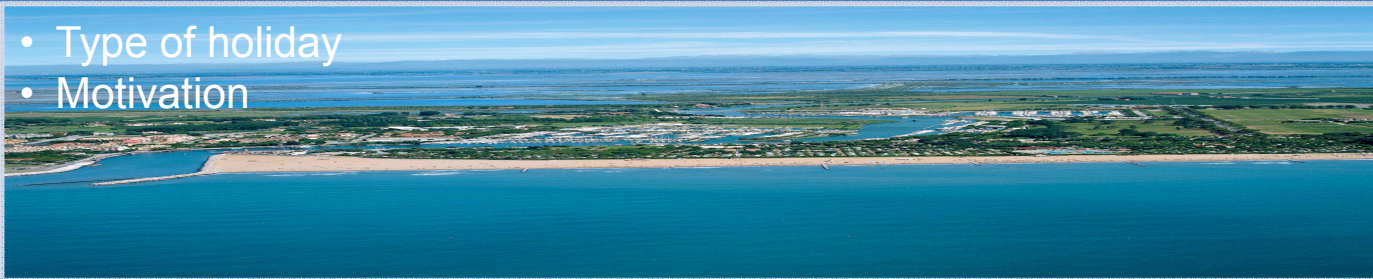
Intermediate results: Die Deutschen sind erfahrene Urlauber

- **$\frac{2}{3}$ of all holiday-makers start planning their holiday at least $\frac{1}{2}$ year ahead**
- **More and more holiday-makers postpone the decision about their accommodation**
- **40% of domestic holiday-makers in Germany knew their accommodation before**
- **Operators' catalogues remain important**
- **Camping guide is most important for camper for planing**
- **91% have made reservations**
- **Longer holidays continue gaining in popularity**
- **Spring becomes increasingly popular for holiday trips**
- **Partial bookings more and more popular**
- **The car remains the most import transportation medium for holiday-makers, however is loosing against plains**

*geplant

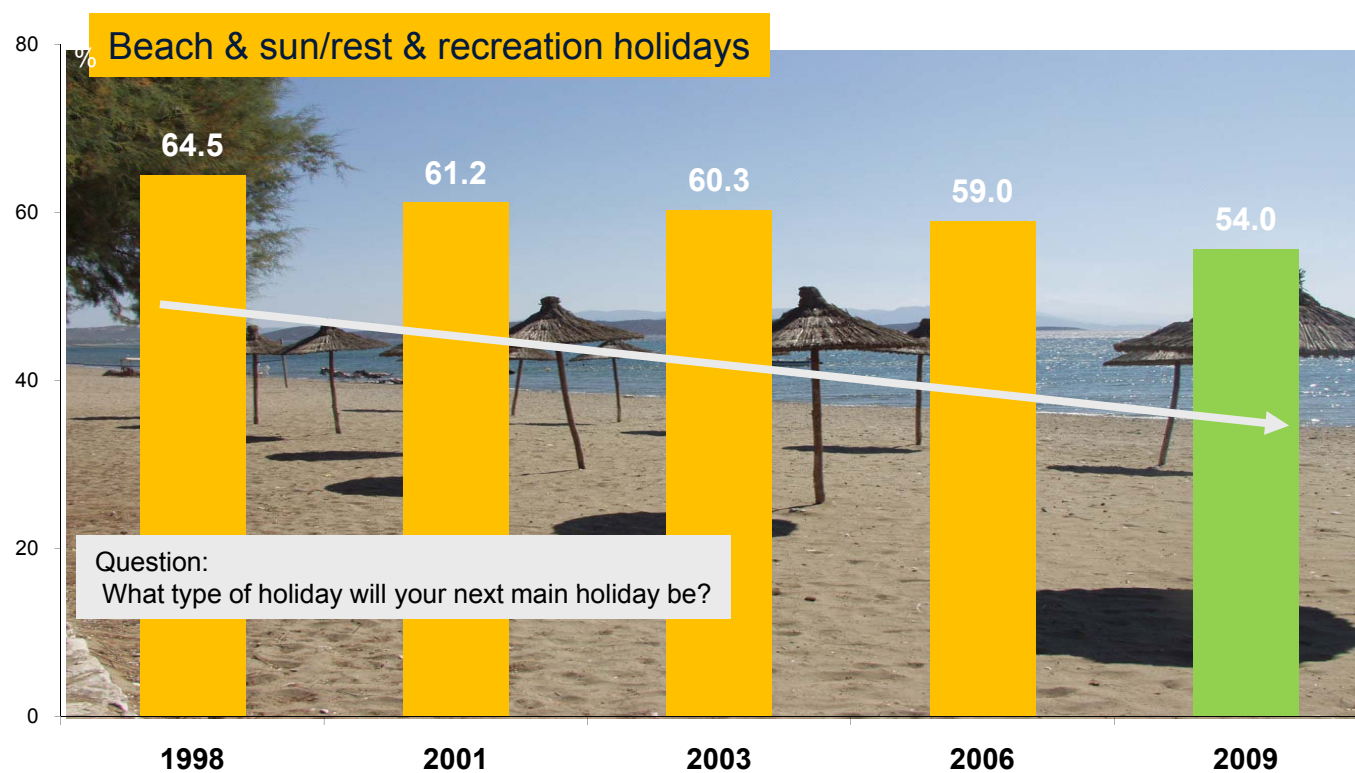
Vacation details

- Type of holiday
- Motivation



Type of holiday: beach & sun/rest & recreation holidays are the most popular

Classic beach & bathing holidays will gain slightly in 2009

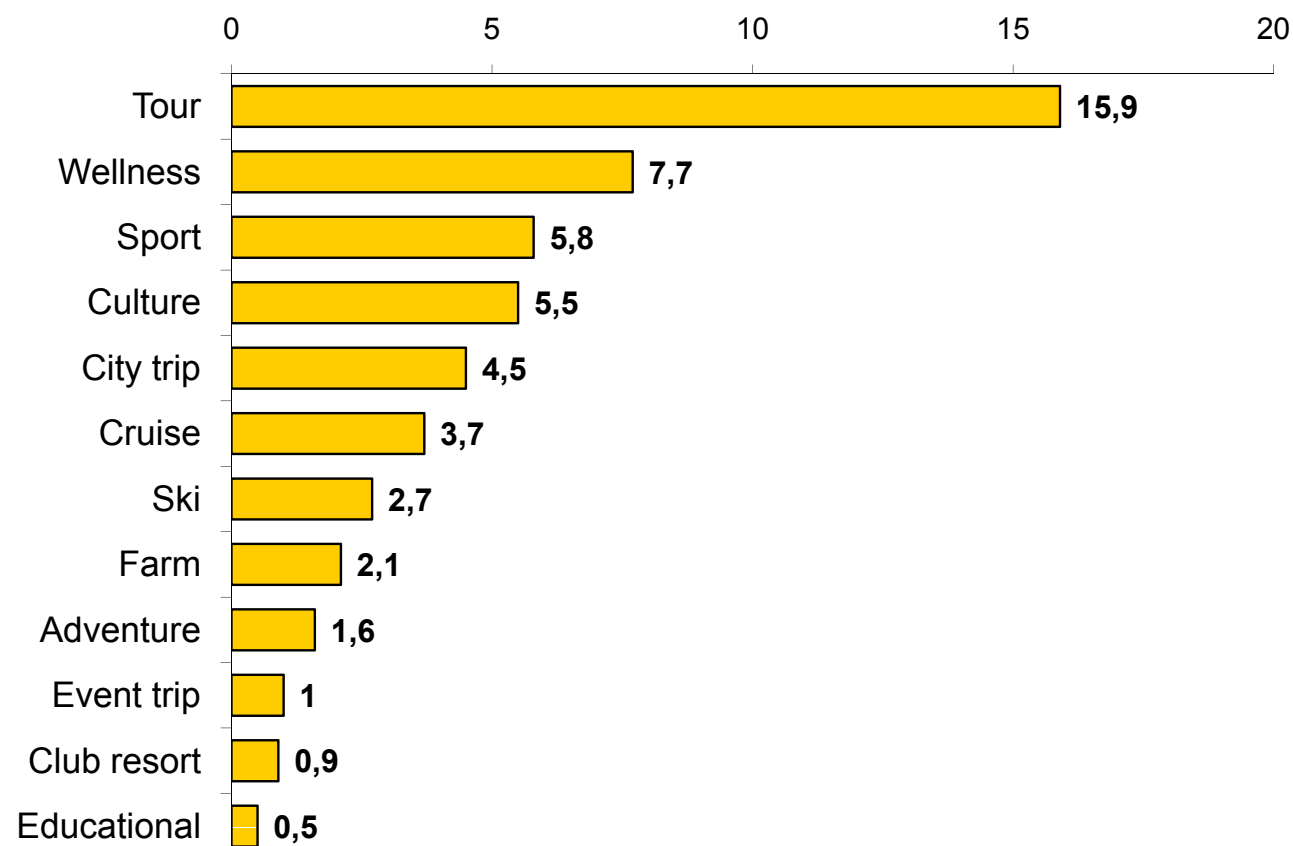


*planned

ADAC

2009* Type of holiday

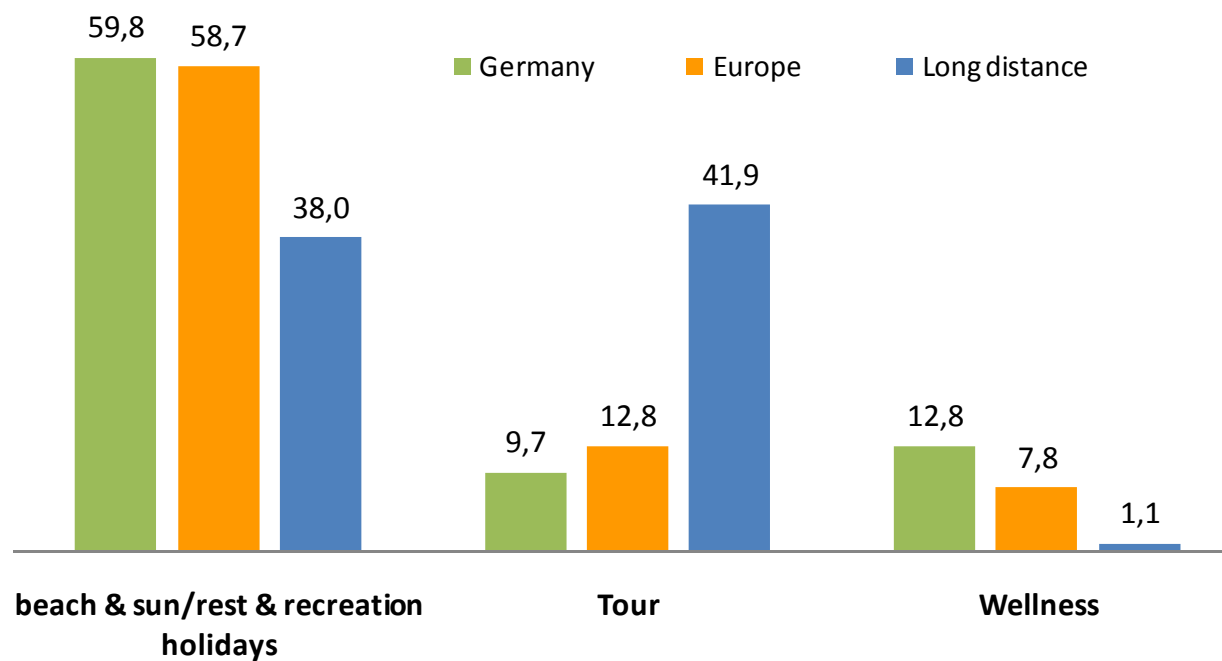
Tours are the runner-up in holiday planning



*planned

2009* Type of holiday

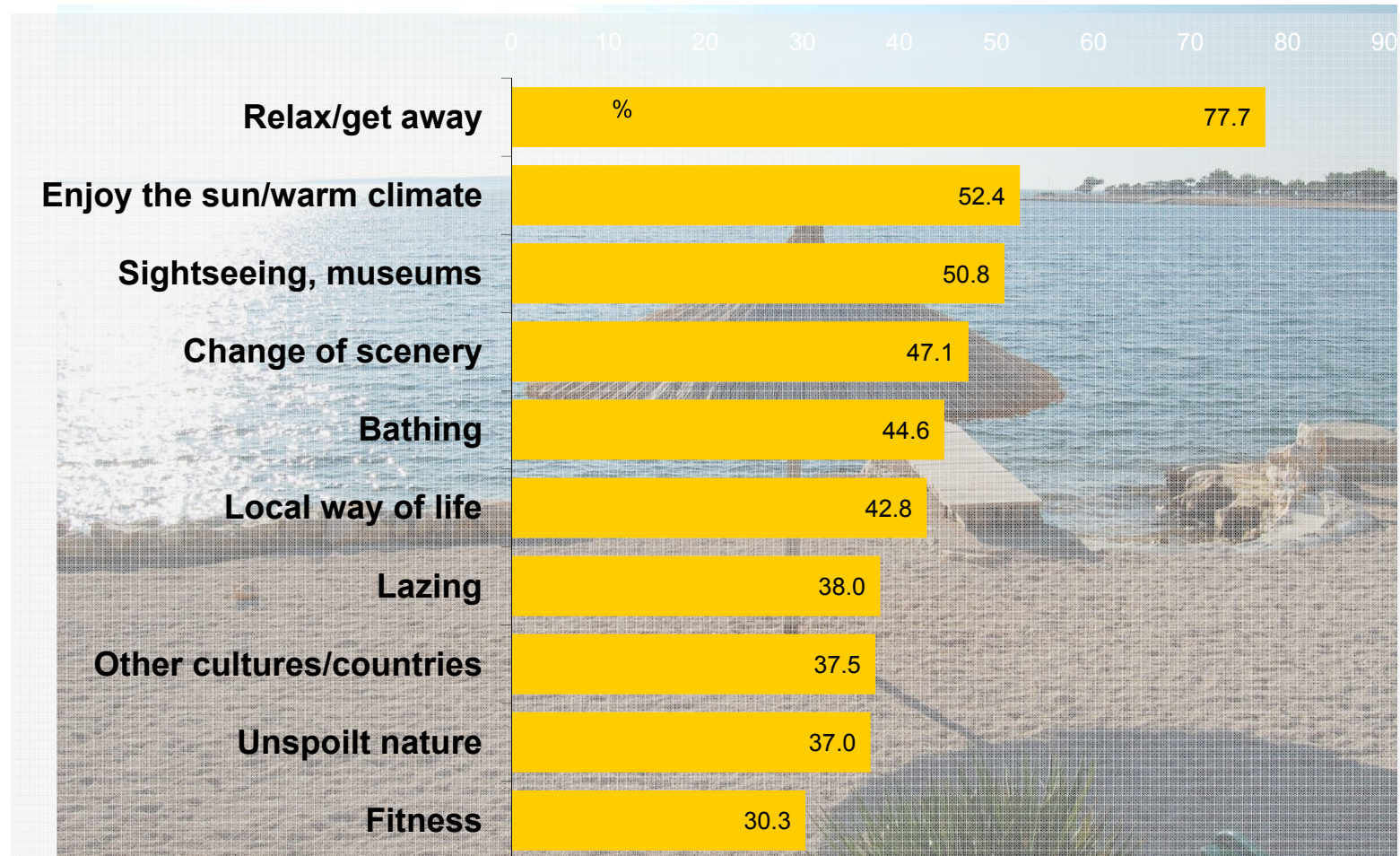
Tours are part of every second long distance trip



*planned

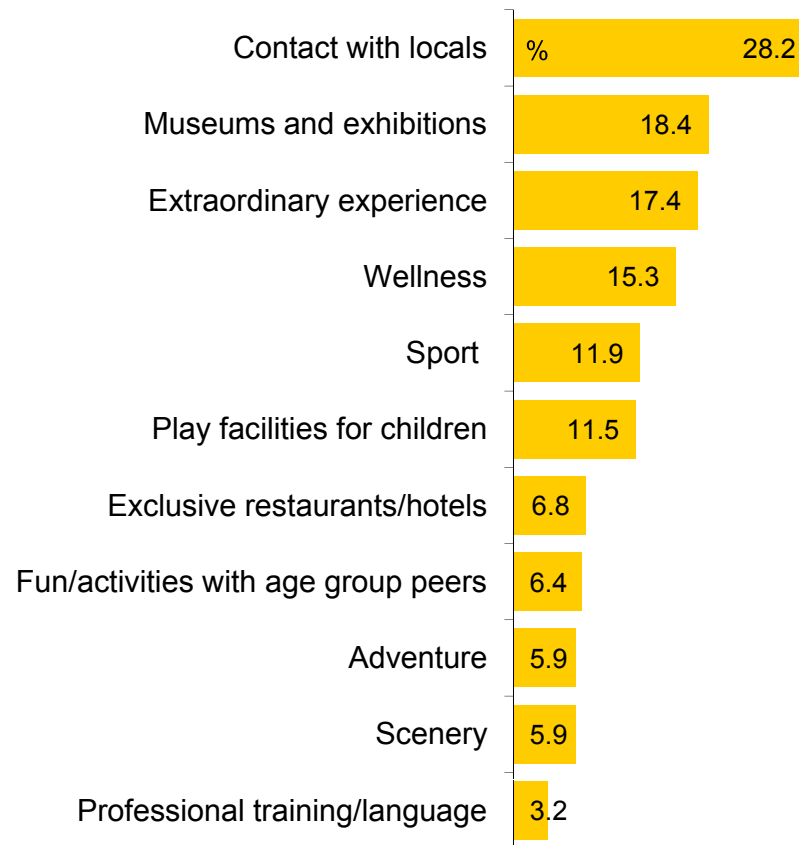
Top 10 motivations to take a holiday

78% want to get away and relax



Motivations to take a holiday

One in three looks for contact with locals



Intermediate results: Germans are active holiday-makers

- **Classic beach & bathing holidays will gain slightly in 2009**
- **Tours are the runner-up in holiday planning**
- **78% want to get away and relax**
- **Sightseeing and interest in local way of life belongs is important for holiday-makers**
- **Holidays with great variety and entertaining**

*geplant

Demographic trends

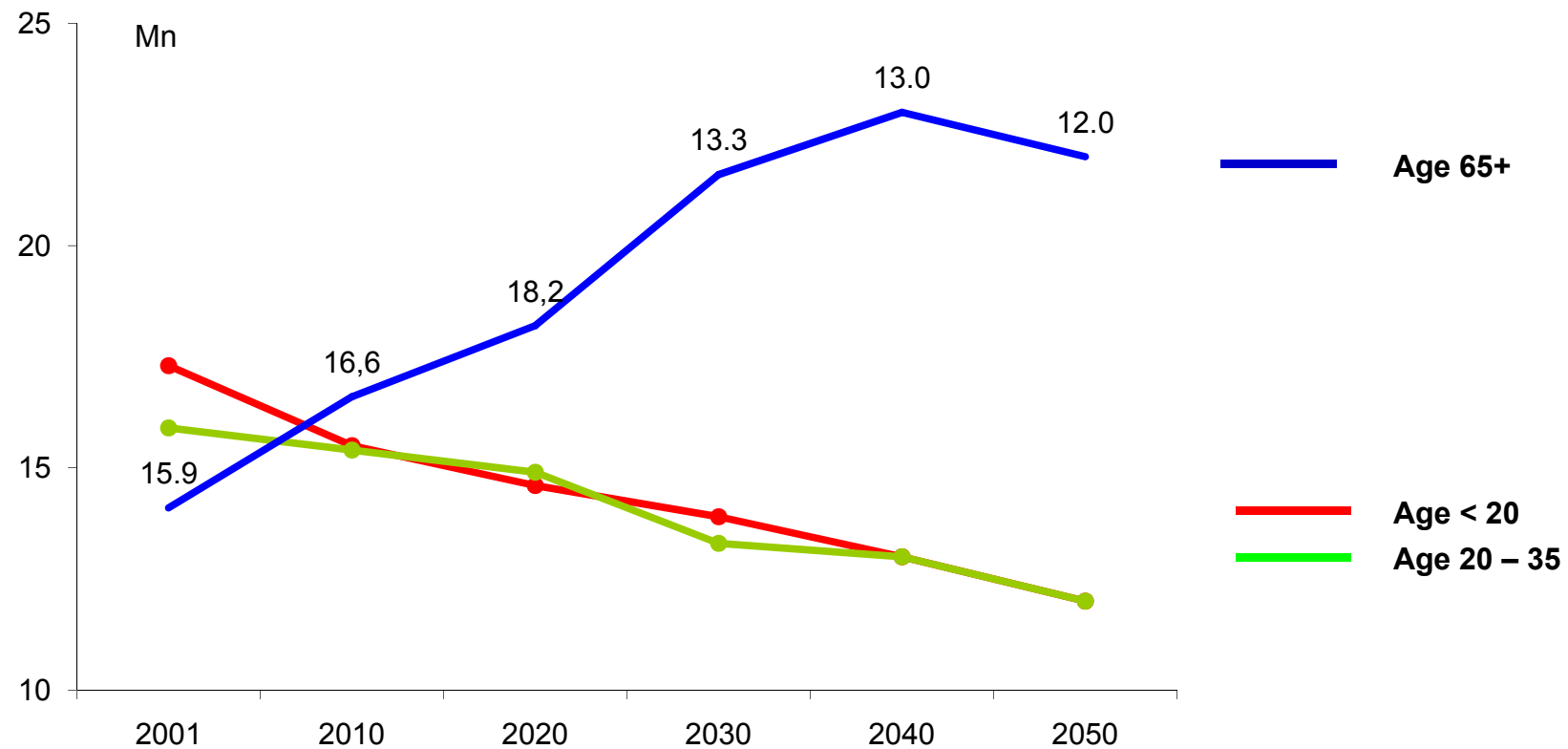
- „Silver age“ holiday-makers
- Holidays with the kids



German demographics to 2050*

Silver-agers are becoming more and more interesting as a target group

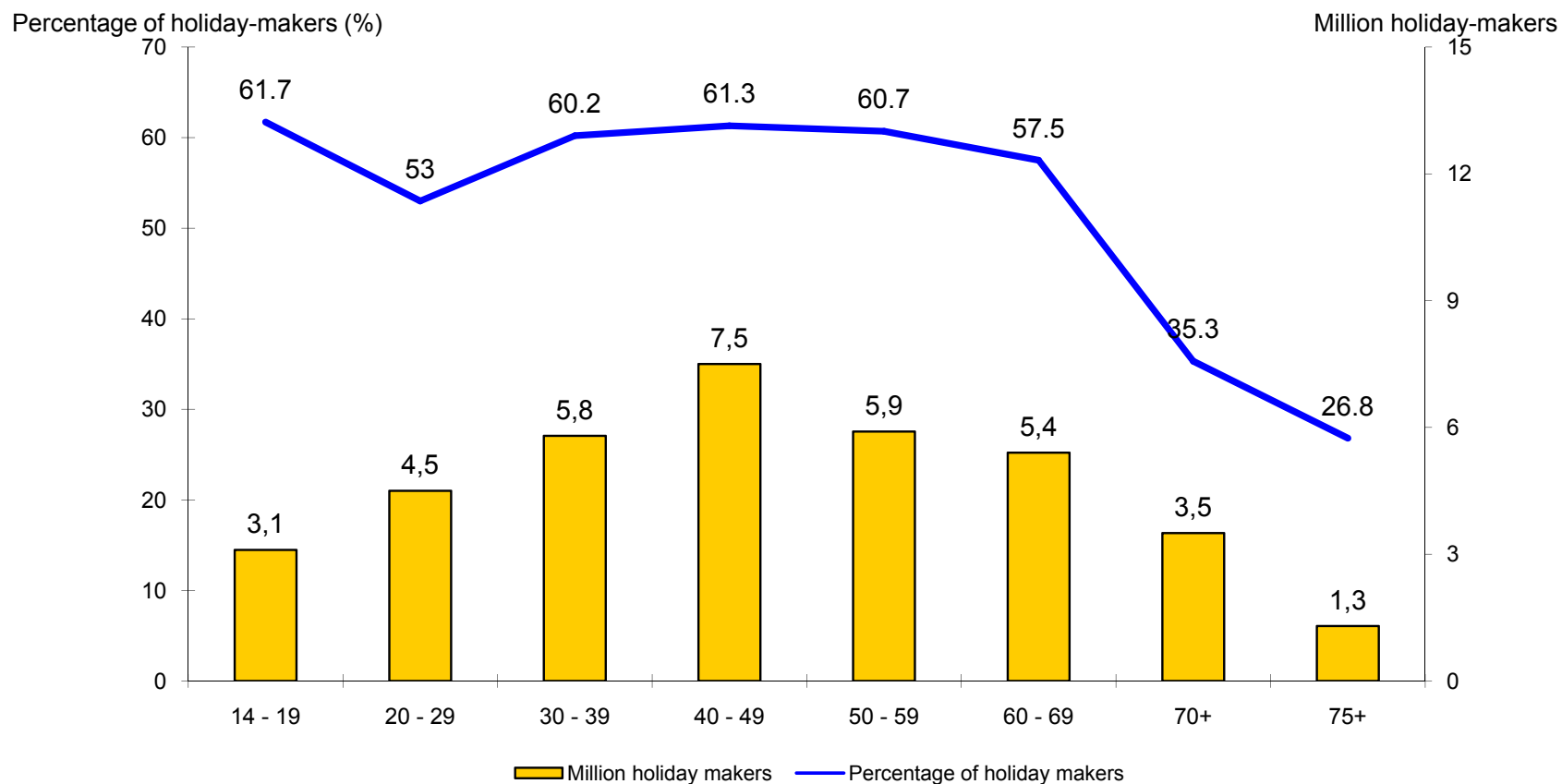
From 2040, the total German population will start declining



* Federal Statistical Office 2003

2008 Percentage of holiday-makers by age group

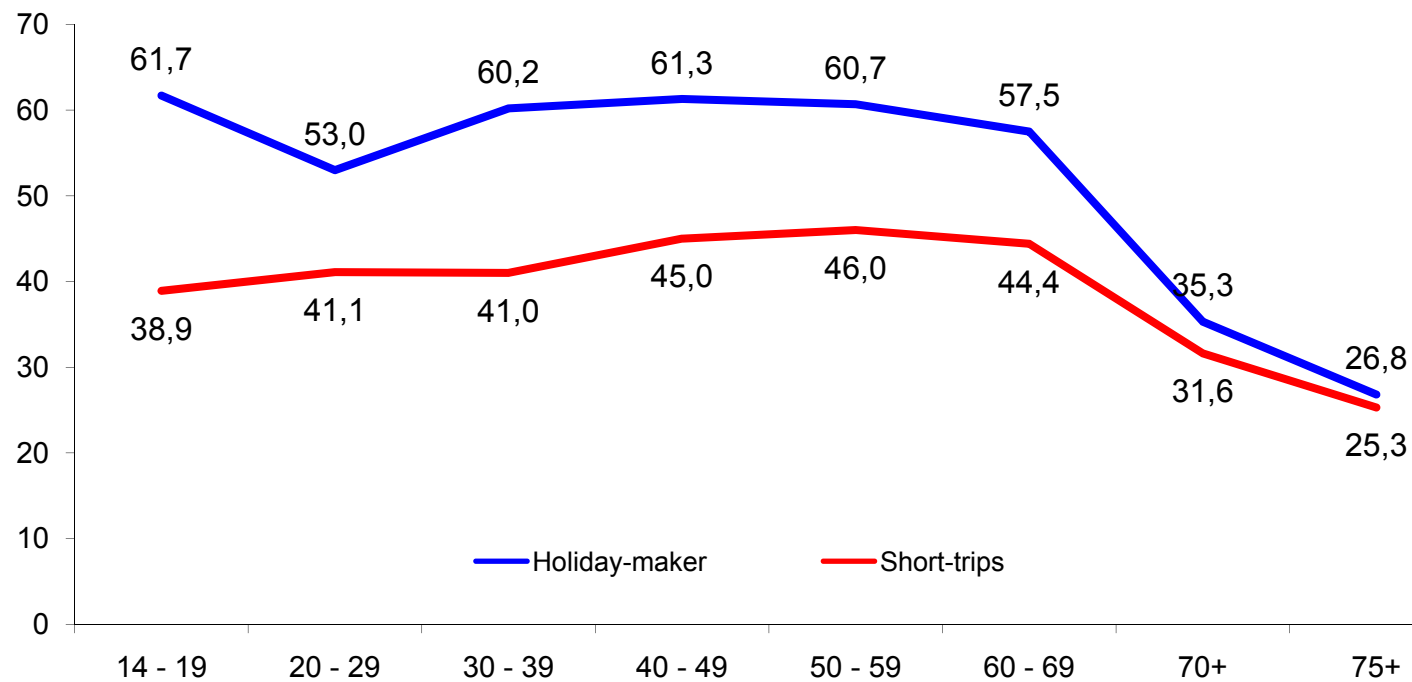
Only one in four in the 75+ age group takes a holiday
(Source: VA [Consumer Analysis] 2008)



2008 Percentage of holiday-makers by age group

Short time trips as well are declining in the group 75 +
(Source: VA [Consumer Analysis] 2008)

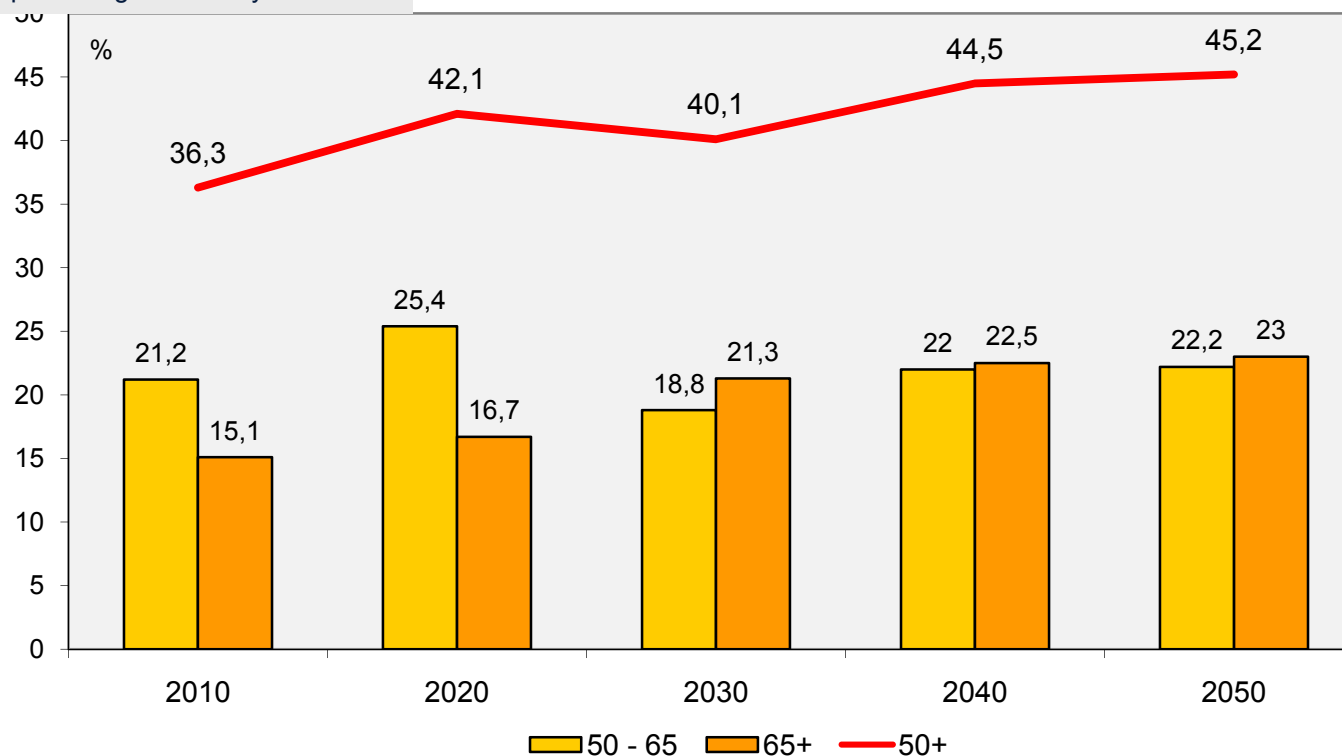
Percentage of holiday-makers (%)



Silver-age holiday-makers (50+): 2010 – 2050*

From 2020, almost every other holiday maker will be over age 50

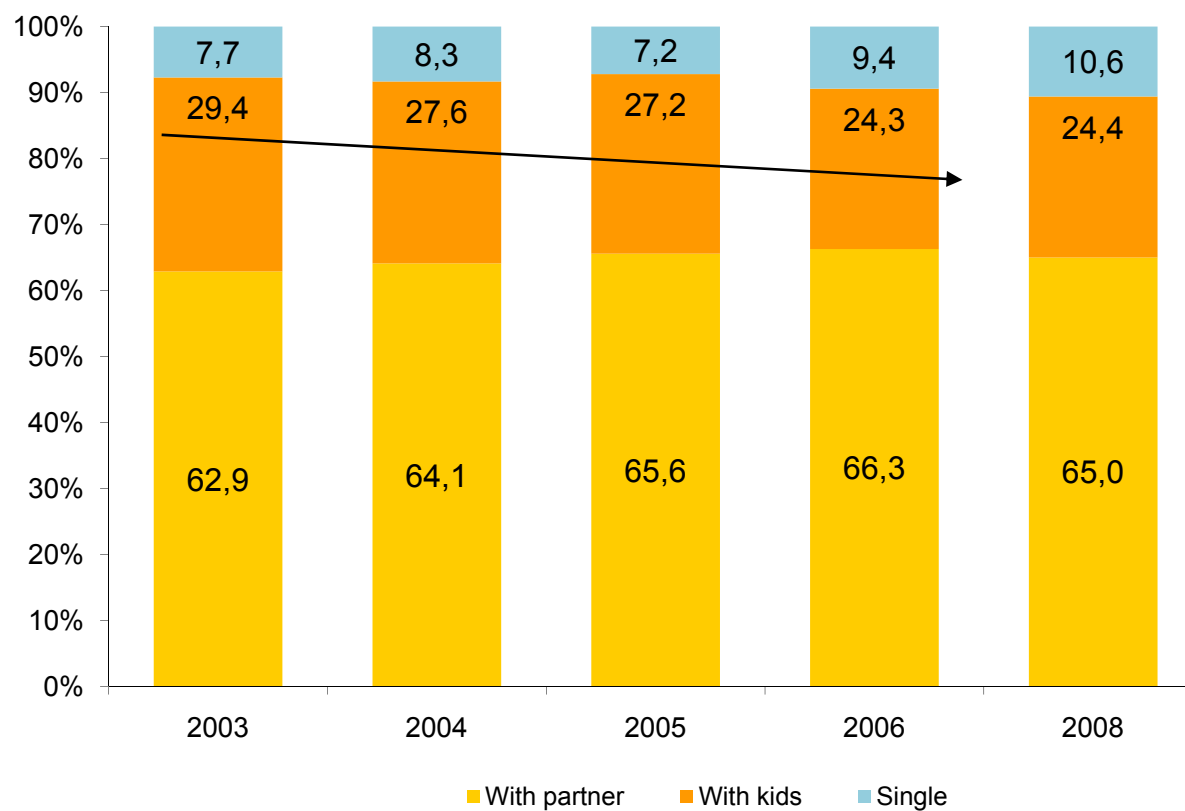
50+ percentage of holiday-makers



*given a constant quota of holiday-makers

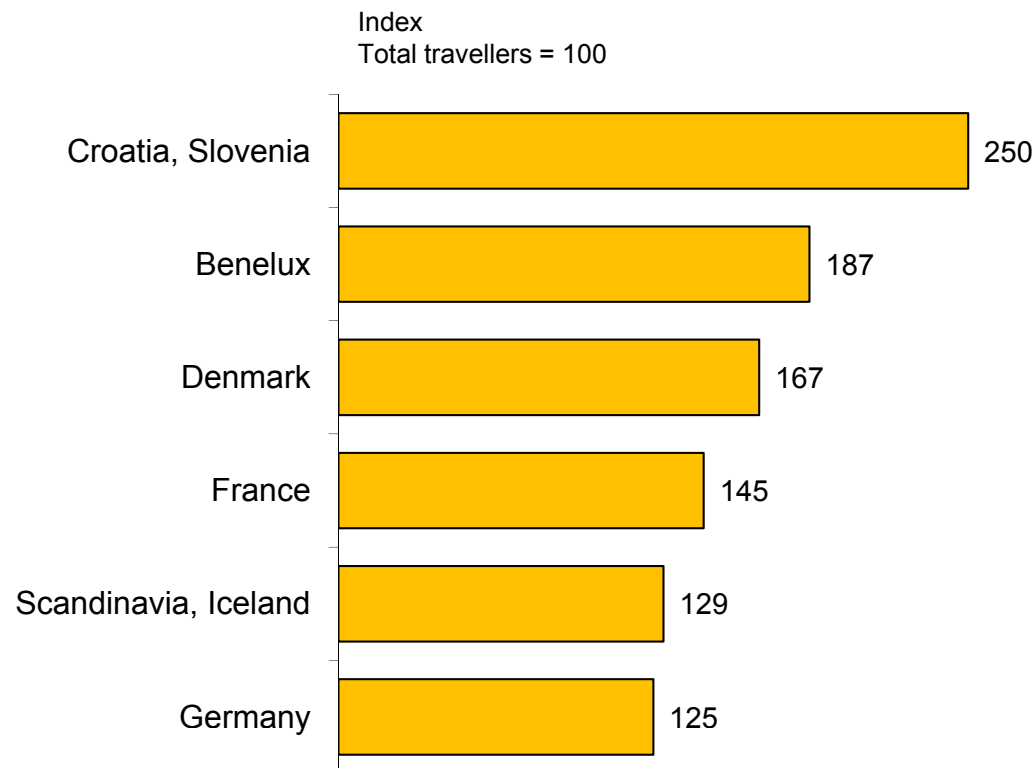
FAMILY/PARTNER/SINGLE holiday-makers

Singles holidays continue gaining
Holidays with the kids maintain low level



European holiday destinations for families with kids

6 European countries are the favourites of families with kids



Conclusions

- **Right now, in many industries, the risks are greater than the opportunities**
- **For tourism, the opposite is true:**
 - **the opportunities are greater than the risks**
 - **but competition among the holiday countries and regions is growing**
 - **only those able to offer solutions customised to their target holiday-maker groups will be successful**

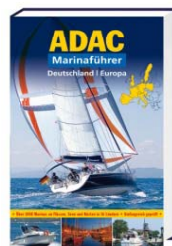
ADAC Verlag-products for First-Class-Targetgroups



ADAC motorwelt
Leser:
 18,5 Mio.
Auflage:
 13,8 Mio.
 1/1 Seite, 4c
 107.200,- €

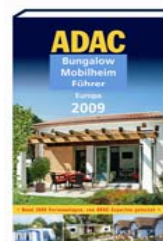
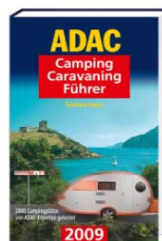


ADAC reisemagazin
Leser:
 3,4 Mio.
Auflage:
 149.000
 1/1 Seite
 18.120,- €



ADAC Marinaführer
 Auflage: 55.000 Ex.

ADAC CCF
Auflage:
 Süd: 115.000 Ex.
 Nord: 105.000 Ex.



ADAC BMF **ADAC Stlpf**
 Auflage: je 40.000 Ex



ADAC freizeitmobil
Auflage: 475.000 Ex.
EVT: Dez./April/Aug.
 1/1 4c
 15.300,- €



ADAC SkiGuide
Ausgaben 2009
Auflage: 50.000



SkiKompakt
Auflage: je 10.000



ADAC Skimagazin
Auflage: 90.000



Ihre Ansprechpartner in den Verlagsbüros und Anzeigenabteilung

Nielsen I

Verlagsservice Rüdiger Ritschel
Nicole Simons
Fontenay 1c
20354 Hamburg
Telefon (0 40) 22 72 25-0
Telefax (0 40) 22 72 25-10
E-Mail: info@vsritschel.de

Nielsen IIIb

Rainer Kölln Mediaservice GmbH
Rainer Kölln
Weinbergweg 3
70825 Korntal-Münchingen
Telefon (07 11) 83 99 77-0
Telefax (07 11) 83 99 77-55
E-Mail: koelln.mediaservice@web.de

Geschäftsführung

Dr. Carsten C. Hübner
Telefon (0 89) 76 76 2320

Gesamt-Anzeigenleitung

Ulrich Witt
Telefon (0 89) 76 76 47 13
E-Mail: ulrich.witt@adac.de

Nielsen II

imedia Medienvertretungs GmbH
Friedrich Sülteimer/Margarete Neumann
Bastionstr. 6a
40213 Düsseldorf
Telefon (02 11) 8 62 99 70
Telefax (02 11) 13 24 10
E-Mail: adac@imedia-net.de

Nielsen IV

Horst Decker Mediaservice GmbH
Patrick Kittler
Hanauer Str. 58
80992 München
Telefon (0 89) 15 50 51
Telefax (0 89) 15 44 88
E-Mail: info@decker-services.de

Leiter Anzeigenmarketing

Christian Krause
Telefon (0 89) 76 76 60 55
E-Mail: christian.krause@adac.de

Leiter Anzeigenverkauf

Josef Eisenberger
Telefon (0 89) 76 76 60 35
E-Mail: josef.eisenberger@adac.de

Nielsen IIIa

Armin Müller-Merkert Mediaservice
Armin Müller-Merkert
Finkenhofstr. 27
60322 Frankfurt
Telefon (0 69) 59 06 74
Telefax (0 69) 59 63 20 9
E-Mail: mueller-merkert@t-online.de

Nielsen V - VII

Verlagsservice Rüdiger Ritschel
Nicole Simons
Fontenay 1c
20354 Hamburg
Telefon (0 40) 22 72 25-0
Telefax (0 40) 22 72 25-10
E-Mail: info@vsritschel.de

Anzeigenverkauf

Gabriele Möbius
T (089) 76 76 62 05
Fax (089) 76 76 34 96
gabriele.moebius@adac.de

Frankreich

Leadermedia
Pierre-André Obé
125 avenue des Champs Elysées
75008 Paris
Telefon (1) 53 57 69 13
Telefax (1) 53 57 69 15
E-Mail: p.obe@leadermedia.fr

USA

Publicitas North America Inc
330 Seventh Avenue,
5th Floor
USA-New York, N.Y. 10001
Phone +1 (212) 5 99 50 57
Fax +1 (212) 5 99 82 98
email: ppn-newyork@publicitas.com

Abwicklung

Gaby Hirschauer
T (089) 7676-6384
F (089) 7676-3496
gaby.hirschauer@adac.de
Claudia Röhrecke
Tel (089) 76 76 63 28
claudia.roehrecke@adac.de

Ihre Ansprechpartner in den Verlagsbüros Touristik Ausland

Dänemark/Schweden/ Norwegen

Heinrich Sellhorn oHG
Jens Jensen
Spaldingstraße 110 A
20097 Hamburg
Telefon +49 (40) 2 38 83 30
Telefax +49 (40) 23 10 20
info@sellhorn.de

Österreich/Schweiz/ Kroatien/Slowenien

IGL Werbedienst GmbH
Günter Kinzel
Jahnstr. 19
A-5021 Salzburg
Telefon +43 (662) 45 36 15
Telefax +43 (662) 45 20 38
office@igl.at

Spanien

Servicios Turísticos
Heinze Latzke S.A.
Siegfried Heinze
Carrer Anglí, 31 3º
E-08017 BARCELONA
Telefon +34 (93) 280 40 44
Telefax +34 (93) 205 63 90
info@servitur-heinze.com

Italien I

(Südtirol, Trentino, Belluno)
aries.creative
Siegfried Unterkircher
Industriezone 1/5
I-39011 Lana
Telefon +39 (0473) 49 08 00
Telefax +39 (0473) 49 08 01
info@ariescreative.com

Italien II

Übernachtungen, lokaler
Fremdenverkehr
(außer Südtirol, Trentino, Belluno)
A. Janetzki s.r.l.
Giancarlo Janetzki
Viale Pio VII, 45-49r
I-16148 Genova-Quarto
Telefon +39 (0 10) 38 17 59
Telefax +39 (0 10) 38 35 81
janetzki@janetzki.it

Italien III

Überregionaler/regionaler
Fremdenverkehr
(außer Südtirol, Trentino, Belluno)
Publitour S.p.A.
Paolo Esposito
Via Casette di Sotto 13
I-37060 Palazzolo di Sona VR
Telefon +39 (0 45) 6 09 16 11
Telefax +39 (0 45) 6 08 23 06
commerciale@publitour.it

USA

America Live, Inc
René Welti
5070 Johns Creek Ct., Suite 100
USA - Alpharetta, GA 30022
Telefon +1 (770) 448-4479
Telefax +1 (770) 448-4619
rwelti@americalliveads.com