The German and the Austrian travel habits. An analysis over time based on the German Reiseanalyse and the Austrian official travel behaviour surveys

(THEME 2 'Analysis of demand-side behaviour and consumption')

1.   Introduction: The need for tourism demand side surveys

Within many Western European countries, a high share of the population goes on holiday travel at least once a year: In 2013, 60% in Austria and 75% in Germany. This means that these countries are important source markets for outbound and domestic tourism. The growth of tourism into a mass phenomenon in these countries started in the late 1960ies. During this time tourism destinations, ministries and the travel industry in Austria and Germany recognised their need to know the tourism demand and travel behaviour. In both countries surveys on the travel habits of the population have a long tradition: Since 1969, tourism demand and travel behaviour in Austria are measured on an annual basis (until 1996 every third year); since 1971 in Germany with the annual Reiseanalyse.

The paper is mainly aimed to share experiences in regard to travel behaviour related surveys, and in particular related to techniques and limits and different options in set-up and methodologies. Considering holiday trips with 4 and more nights, the paper intends to show the changes and developments of the travel behaviour of the German and the Austrian population over a long period of time. In addition, socio-economic developments of the German and Austrian population are taken into account, which have effects on the overall travel behaviour. At last, some insights are presented on how long-haul destinations can profit from the results of these surveys.

2.   Set-up: How to finance and keep running national demand side surveys

Austria:

The sample surveys on the travel behaviour of the Austrian population have been conducted by Statistics Austria since the reference year 1969. According to the responsibilities and principles and as an independent and non-profit-making federal institution under public law Statistics Austria is publishing the main results and their underlying concepts, definitions and explanations to the public free of charge. The costs of the survey are mainly covered by the overall budget of Statistics Austria.

The surveys are currently done by using CATI-technique, by using the telephone-facilities of Statistics Austria. The main data users are Eurostat, the "Federal Ministry of Science, Research and Economy" (http://www.en.bmwfw.gv.at/Seiten/default.aspx), the "Austrian Central Bank" (http://www.oenb.at/en/) and Statistics Austria itself. Furthermore, foreign tourist boards are important data users, since they want to know more about the travel behaviour of the Austrians to their countries.

Related to the field work Statistics Austria cooperates with an external market research institute which carries out the interviews with about 13 agents in the call center of Statistics Austria, done in the month following the reference quarter. The development of the questionnaire, the supervision of the agents, the plausibility check, the evaluation of the results and the data processing are done by

Statistics Austria. Peter Laimer and Johanna Ostertag-Sydler are the project leaders, who function as a link between the responsible department, the call center and the IT section of Statistics Austria, and the external partner.

Germany:

The German Reiseanalyse is a privately organised multi-client study that is 100% non-profit-oriented. It is run by an independent association of tourism destinations and the travel industry that have an interest in using the Reiseanalyse data, the FUR (Forschungsgemeinschaft Urlaub und Reisen e.V.). This ensures a very high relevance of the results. At the same time it means the lowest possible price for the information, as many clients share the costs and as the focus is on stakeholder value rather than on shareholder value as with commercial enterprises. This setup seems to be the secret behind the success and continuity of the Reiseanalyse and to our knowledge is unique in the world (Lohmann & Sonntag, 2006).

With the help of the Reiseanalyse, the FUR elaborates research achievements to a value of EUR 500.000 and above, each year. According to the statutes, the FUR does not make any profit, but reinvests any surpluses completely into research work. The FUR (Rolf Schrader) together with the NIT (Institute for Tourism Research in Northern Europe: 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 cooperating for more than 20 years.

3.   Methodology:

Austria:

Official surveys on the travel habits of the Austrian population have a long tradition at Statistics Austria: Between 1969 and 2002 this field of interest has been investigated mainly in intervals of three years within a Microcensus special program regarding "holiday trips"; these face-to-face surveys comprised a sample size of 60,000 individuals (Statistics Austria, 2003). - Due to organisational changes of the Microcensus and considering European legal requirements related to tourism statistics since the reference year 2003 the respective surveys are carried out by "Computer Assisted Telephone Interviews" (CATI). The survey intends to receive useful information on tourism patterns and tourism flows. Since tourism is very much affected by seasonal variations and people increasingly tends to go on short-term trips, the survey is conducted on a quarterly basis in order to avoid memory gaps and to draw a comprehensive picture of tourism peaks over one calendar year (see also Laimer & Öhlböck, 2006; Statistics Austria, 2009; Laimer, 2012; Ostertag-Sydler & Klem, 2014).

The sampling takes place quarterly and excludes those persons already questioned in the three previous quarters. For reasons of representativeness the gross sample (about 25,000-30,000 persons) is drawn from the "Central Registration Register" (CRR) of the Ministry of Interior which allows a stratified random selection (1st level: province, 2nd level: age, 3rd level: sex, 4th level: nationality). In general the survey considers persons 15 years and older in private households. Therefore, the results do not include data of people living in institutions (e.g. persons in retirement homes) and there is also no information available about the travel habits of persons younger than 15.

For the persons in the gross sample, telephone numbers are looked up in the official telephone book, by linking it concerning last name and address. Due to a growing volume of telephone numbers not being registered in a telephone book and the replacement of land lines by cell phone numbers not open to the public, no telephone numbers can be found for approximately 50% of the persons in the gross sample.

Two weeks before the interviewing phase starts the persons to be questioned (approximately 11 000 persons) are informed by means of letter that they have been selected for this survey and are kindly requested to participate. The letter contains information about the survey purpose, data security, legal background, as well as, contact information for questions. This service is aimed at ensuring the quantity and quality of the answers. - Out of the data pool of about 11 000 persons 3 500 interviews (net sample) are carried out quarterly.

The interviews are compiled in the in-house telephone studio, the software used is BLAISE (http://www.blaise.com/). To reduce the recall problem, the interviewing phase starts immediately in the month after the quarter. The average interview length lies at 15 to 20 minutes. The participation is voluntarily. On average there is a response rate of about 50 to 60 %. Should a person show no interest in participating, a different person out of the household can be questioned if this person has information concerning the travel behaviour of the person chosen (=proxy interviews).

The questionnaire includes questions concerning domestic and outbound holiday trips with and without overnight stays related to the number, the destination, the means of transport, the purpose, the means of accommodation, the organisation, the month of travel, the size of the travel group (only household members), the duration and the travel expenses (Laimer&Ostertag, 2008).

Due to the possibilities the software BLAISE offers, plausibility checks are integrated into the interviews. These consistency checks make sure that most typos and outliers are identified and replaced immediately. Some implausible values are corrected after the interview. In addition there are also often missing values and a recall problem (e.g. expenditure is unfortunately often forgotten or not paid by themselves, in case with business trips). Missing and implausible values on individual questions (item-non-response) are replaced after the interviews (imputation).

Even though the coverage of the population is in general given due to the usage of the CRR, a problem remains on account of the linkage with the official telephone book. There could be a bias due to the fact that persons with cell phone numbers withheld to the public and individuals using mobile phones with phone cards are not covered.

Since the results are based on a sample, the extrapolated values are afflicted with a certain sample error which is rather high for results with a low number of cases, e.g. due to the size of the sample, the number of cases doing same-day visits sometimes is rather low. The grossed up values, therefore, vary from quarter to quarter for answers which are based on a very small sample. Sometimes no significant conclusions can be drawn (Laimer & Ostertag, 2008).

Germany

The methodology used in the Reiseanalyse study is an innovative mix of 8.000 face-to-face and 5.000 online interviews, representative for the German population, to cover outbound and domestic tourism demand. This guarantees continuity and the highest possible quality (face-to-face) while at the same time profiting from the general advantages of online surveys such as low cost and fast results. It also provides the flexibility to explore the different aspects of tourism consumption and decision making with the best possible methodology, e.g. long term trends in tourism behaviour in the face-to-face survey and actual online holiday planning with online interviews (Sonntag & Boll, 2013). As all results presented in the paper originate from the face-to-face survey, we will not cover the methodology of the RA online surveys in detail.

The sampling frame for the Reiseanalyse 2014 face-to-face survey consisted of German-speaking men and women aged 14 or older, living in private households at the principal domicile (Media analysis 2013: 70.3 million). This includes German citizens, citizens from other EU countries and citizens from non-EU countries. Persons from non-EU countries are limited to those who are either in education (school, vocational training, study) or have a school-leaving qualification. Private households are defined as persons living together and forming an economic entity, as well as persons living alone and

forming an economic entity by themselves. Institutions are not considered as private households. (This and all further details on methodology based on FUR & Ipsos, 2014)

The selection of interviewees was made by stratification and multi-graded random sampling. The starting point for the interviewer was a random list of addresses of households, graded by federal state and size of constituency. Further households to be interviewed were selected by following the random theory (random-route). Within the selected households, the person to be interviewed was selected using a random key ("birthday key"). Only one interview was carried out per household. Altogether, 1,430 sample points were covered.

The study is carried out as a single-subject survey, covering subjects directly linked to holidays as well as other areas related to travel. Personal interviews have been con-ducted by trained Ipsos Operations GmbH interviewers during the period of January 2 to February 7, 2014. The interviewers used shuffle cards, lists and maps to facilitate the survey.

In the Reiseanalyse one single sample net-work is used. This is in contrast to other surveys with large samples which often accumulate different sample networks. Using a total gross basis of n = 11,300 the net random sample was n = 7,795 persons. This equals a 75 % response rate, which is far above the average for this type of random sampling. The non-response rate is made up of being unable to contact those to be interviewed and to a lesser extent of people refusing to participate. A systematic relationship between survey questions and willingness to participate is not discernible from the avail-able information.

This survey was conducted by a total of 968 interviewers. The interviewers were chosen based on their necessary experience and qualifications in conducting structured surveys. As usual in partially structured surveys, the interviewers were given written instructions. The checks followed institute guidelines and were carried out with 15 % of the interviewers.

Incoming questionnaires were checked for completion. A specially customised programme used by Ipsos performed the data evaluation as well as checks for plausibility and accuracy of answers. Wherever necessary, the data was supplemented or corrected using the original questionnaires.

Within the framework of standard factor weighting, the random sample of households was replaced by one of people. This makes the odds of selecting a household the same as those of selecting a person. The alignment followed the characteristics of federal state/constituency size, age/gender, house-hold size, net household income, school education and citizenship. The guidelines were taken from the current media analysis (MA 2013). The results are shown on the basis of n = 7,795. Irrespective of the above, the total number of replies listed in the tables is occasionally distorted. This is the inevitable result of the factor weighting required in random sampling which, however, does not affect the reliability of the results.

The selection of the interviewees followed the rules of sampling theory. As a consequence, deviations from the representative sampling frame in the survey results which are caused by random sampling can be calculated by mathematical and statistical formulae. As in the present case of multi-grade random sampling the margin of error is estimated using the correlation formula shown in the following table. As usual in empirical social studies a 90% confidence interval forms the basis of the amounts of deviation.

4. Results

4.1 Evolution of tourism demand in Germany and Austria

Travel intensity

The travel activities of the Austrian population have increased significantly over the past four decades. In 1969 only slightly more than a quarter of the Austrian population aged 15 and over undertook at least one holiday trip of at least four nights (travel intensity: 28%), in 2013 it was already 59% or 4.2 million people (Statistics Austria, 2014b).

In Germany we see the same dynamic growth during this period, yet on a higher level. In 1971 slightly less than half of the population aged 14 and above undertook at least one holiday trip of at least four nights (travel intensity: 47%). In 2013 the figure was 78% or 54.8 million people. (These and further results about the German source market have been published in Schmücker & Koch, 2014 and Lohmann et al., 2014).

All following analyses are based on holiday trips with at least four nights.

Number of holiday trips

The holiday travel volume of the Austrian population has quadrupled in the last 40 years, and increased between 1969 and 2013 from 2.3 to 9.2 million. Based on the number of people travelling this means that each person performs more than two holiday trips per year (2.1 trips); in 1969 there were 1.2 trips.

In Germany the volume of holiday travel almost tripled from 25.0 million in 1971 to 70.7 million in 2013. This means each travellers in 2013 is going on 1.29 holiday trips on average (1971: 1.15) Looking at the German volume figures, one needs to take into account that between 1971 and 2013 there have been two shifts in the basis, both leading to a significant increase: Since 1990 the trips of total Germany are covered (formerly: Only West- Germany); since 2010 the German-speaking population in Germany aged 14 and above are covered (formerly: German population in Germany aged 14 and above).

Holiday destinations

In both countries the share of domestic and outbound trips related to total trips have changed: In 1969 domestic travel in Austria accounted for 55% (1.24 million) of total trips and was even more important than traveling abroad, while in 2013 this was with 37% (3.37 million) significantly under half of all holiday trips; accordingly, traveling abroad increased, whose share rose by almost 20%-points to 63% between 1969 (1.02 million) and 2013 (5.83 million). In Germany, the share of domestic holidays declined from 45% (11.3 million) to 30% (21.2 million); at the same time travelling to international destinations increased from 55% (13.7 million) to 70% (49.5 million).

For both countries, this means that the own country is still by far the most important holiday destination. Looking at the international holiday destinations, we find the following picture for Austria: Although with share losses, Italy remained the most popular holiday destination for Austrians in the past four decades: In 1969 around 40% of the holiday trips abroad with at least four overnight stays was done to Italy, in 2013 it was about one-fifth (20%); the number of trips to Italy rising from 0.40 million in 1969 to 1.15 million in 2013. Since the early 1990s, Croatia was significantly becoming popular as a holiday destination, from 5.0% (1993) to 13% share of trips abroad in 2013. At third and fourth among the most popular travel destinations abroad Germany (1969: 10%; 2013: 10% of outbound trips) and Spain (1993: 8%; 2013: 7% of outbound trips) followed. Greece with 6% of total trips abroad was fifth, even though since the early 1990s (1990: 11.9%) this destination gradually lost its importance, but compared to 2012 (4%) again significantly rose. Turkey as the sixth most

important travel destination of Austrians could increase its share since the early 1970s (1%) to 6% (2013), although since 2001 (10%) significant share losses are observed. In 2013 about 13% of trips abroad concerned destination countries outside Europe, in 1969 it was only 1% The most popular international holiday destination 2013 on the German market is Spain (13% of all holiday trips) followed by Italy (7%), Turkey (6%), Austria (6%) and France (3%). During the 1970ies and 1980ies, Austria and Italy had been leading this ranking, but with the abundance of cheap package air travel first Spain and since the mid 1990ies Turkey have been gaining market shares on cost of Austria and Italy. Long-haul trips to destinations outside Europe and the Mediterranean increased from a market share of 5% of all holiday trips in 2003 to 7% in 2013.

Season of holiday travel

Due to increasing leisure and vacation demands and the changed distribution of school holidays (e.g. autumn holidays) the classic summer vacation in July and August have lost importance in both countries; accordingly, in recent decades the tendency to a seasonal better balanced distribution of holiday trips is observable:

In 1968/69 (November 1968-October 1969) 62% of the holiday trips of the Austrian population were made during the months of July and August, whereas in 2012/13 there were only 35%. While the Austrians are traveling in summer still more than in winter season, the latter is gaining importance; every third holiday trip is now in the winter months (October to March; 1968/69: 12% of holiday trips; 2012/13: 34%).

Looking at the Germans, during the year 1972 53% of their holiday trips happened during July and August. In 2013 the share for these two months was 37%. Taking into account all four seasons of the year, the share of summer holidays (June-August) decreased from 65% to 48% while all other seasons gained: spring (March-May) from 15% to 19%; autumn (Sept.-Nov.) from 15 to 23% and winter (Jan.-Feb., Dec.) from 5% to 9%.

Duration of holiday trips

In Austria, the trend to do more than once a holiday trip per year, but with a shorter length of stay, is quite common among all age groups, in particular among older persons or senior citizens. Wellness trips and city trips have increased, which usually associated with shorter stays. 40 years ago, half of the holidays of the Austrians lasted between one and two weeks (1969: 52%), in 2013 the proportion was 36%, only. Accordingly, the share of the holidays that last between five and seven days has increased from 12% in 1969 to 51% in 2013.

In Germany, we also observe the trend to shorter holidays although the tendency to do more than one holiday trip per year is much less developed than in Austria. The average duration of the main holiday trip (being characterised by the respondent as the most important holiday trip of at least four nights) in the year 1972 was 17.5 days, declining to a mere 12.9 days in 2013. Looking at the change of proportions in the last 20 years we see a rise of shorter holiday trips of five to eight days from 24% to 37%, a stagnation of holidays of nine to fifteen days at 49% and a decrease of longer holiday trips from 23% to 15%.

Means of transport

About half of the holiday trips of the Austrians are leading to Austria and Italy. Hence, the means of transport for reaching the holiday destination is the private car (1969: 61% of total holiday trips; 2013: 56%). In 1969, the air plane played with a share of 3% a minor role; till 2013, the proportion has, however, increased eightfold (2013: 29%). This occurred mainly at the expense of the railway, since in 1969 the railway was still used in one quarter of the holiday trips, in 2013 the proportion felt to 7%. While air travel – as expected – plays a minor role in domestic holiday trips, since 1996 more holiday trips abroad are made travelling by plane than by car (except 2001 and 2002).

On the German market, also a lot of the holiday trips are domestic or into neighbouring countries. Hence, the private car is also the most important means of transport (1974: 58% of all holiday trips; 2013: 45%). With the growing offer of cheap package air travel to the Mediterranean (mainly Spain and Turkey), the air plane grew from 3% in 1974 to 38% in 2013. This happened at the expense of the private car and the railway which declined from 20% in 1974 to 6% in 2013. The bus has remained quite stable with a market share of around 8%. A fast growing segment, even though quite small, is cruise ships, with a share of more than 2% in 2013.

Holiday organisation

Trips to neighbouring and accessible by car destinations are organized in vast scale without taking a travel agency or tour operator. As the most popular travel destinations of the Austrians are located in neighbouring countries of Austria or in Austria itself, since 1969 the vast majority of the holidays is organized without the support of travel agencies or tour operators (1969: 82%; 2013: 63%). In the 1970s, 1980s and 1990s due to the increasing flight package tours to holiday destinations in Europe and beyond, the proportion of the holiday trips, organized with the support of travel agencies or tour operators has been risen from 15% in 1969 to 35% in 2000; since then the proportions have been varied between 27% and 37%. The assistance of a travel agency or tour operator is – as expected - to be taken more frequently for holiday trips abroad (2013: 47%).

For Germany, we can observe a similar starting point in the 1970ies with the vast majority of holiday trips being individually organised (1972: 81%). A growing professionalism of the tourism supply side and the growing offer of cheap package air travel to the Mediterranean resulted in an increase of package holidays starting from 19% in 1972 to its peak of 48% in 2005. However, mainly due to the internet, direct bookings have become easier and more comfortable since then. Hence, there is a growing tendency for consumers to book single holiday services directly rather than in a package. Although the package holiday still remains the most important type of organisation (2013: 42%) and the travel agency the most important booking channel, a structural change in favour of direct bookings on internet portals and with accommodation providers is in progress.

4.2   Understanding links between developments in tourism demand and socio-economic changes in society

This prosperous development has been supported by the increasing availability of tourism offers (package tours), but it is also due to socio-economic changes, such as increasing number of elderly people travelling, more travel experienced young persons, increasing single households, increasing available income for travelling, increasing urbanisation etc. and the overall change to a work-life balanced society. We will take a closer look at the links between socio-economic changes and the development of holiday tourism demand for the case of Austria (see also Eichwalder, 1996; Laimer, 2011).

Socio-demographic developments and links to holiday travel

The population structure has changed during the past four decades, as evident by data of population or register-based censuses of Statistics Austria (Statistics Austria, 2013a-c; Statistics Austria, 2014a). According to the population projection for Austria based on 1 January 2012 the total population will increase to 9.0 million people until 2030 and to 9.4 million in 2060. Vienna, the capital of Austria is expected to have the most marked population growth till 2060 (+27%), while Carinthia is the only province being expected to lose some population till 2060 (-8%). Children and youngsters under 20 years are projected to account for a slightly smaller proportion of the total population, namely 19% in 2060 as compared to 20% in 2012. For Austria as a whole, the proportion of the elderly population (ages 65 and over) will grow from 18% in 2012 to 29% by 2060. Due to migration a differentiation by country of birth shows an increase of foreign born population. In the year 2012 1.34 million people born in a foreign country lived in Austria. This averages 16% of the total population. The number of this population group will rise until the year 2030 to 1.76 million (+31%), until 2060 to 2.19 million

(+63%). The share of the foreign born population will increase to 20% (2030) and 23% (2060) respectively (Statistics Austria, 2013a, p.16).

The structure of the population in Austria is – as in other Western European countries as well – characterized by falling birth rates, increasing life expectancy and increasingly older people. According to total Austrian population the proportion of the elderly people (age 60 and over) was still about one-fifth (20%) in 1971, while in 2011 this increased to almost a quarter (24%). On the other hand, the proportion of children under 15 years increased from 24% in 1971 to 15% in 2011.

Over the past four decades, the number of singles and single person households and families without children has increased significantly. A related development concerns the family size: in 1971 the proportion of families with three or more children was still at 17%, in 2011 it was only 8%. Accordingly, the proportion of families with no children in the household increased from 32% to 38%. In this period the number of single households significantly increased: Related to total private households their share increased from 26% to 36%.

Elderly people and senior citizens are increasingly healthier, so that the life expectancy has increased (e.g. they are independent related to school holidays); as travellers this group increasingly gained importance, therefore. In 1971 life expectancy for women was 73.7 years at birth, in 2011 it received 83.4 years, among men it increased from 66.6 to 78.1 years.

In 2011 people from the former Yugoslavia was the largest group among foreign nationals, although their share has increased since 1971 to 4%; Germany is on the second place, and its proportion increased from 1% to 2% , followed by Turkey with 0.2% in 1971 and about 1% share related to the overall population in 2011.

An analysis by municipality sizes shows that the proportion of people living in small towns or cities has decreased, while that in larger municipalities increased. Between 1971 and 2011, for example, the proportion of people in communities between 1,000 and 2,000 residents decreased from 16% to 15%, while that rose in municipalities between 5,000 and 10,000 inhabitants from 11% to 12%.

An analysis of the intensity of holiday travel by age shows that the strongest growth is observed for younger and older age groups. Increased family holidays and also travel organized by schools or similar organizations have led to a participation of children and youths in holiday travel equal or more to that of the total population. E.g., in 1990 the proportion of persons aged 15-24 doing at least one holiday trip in this year was 43%, in 2013 it was with 64% already considerably more than half of this age group. A higher life expectancy, a generally improved medical care and improved health of older persons have led to above-average growth in journeys of people in the age group 55-64 years; the intensity of travel increased 1990-2013 by approx. 26%-points to 62%.

As urbanization is progressing, an increasing intensity of travel is to be expected; in many countries the tourism industry is concerned with the increasing number of urban residents with specific ideas concerning the quality of tourism offer or need for taking a rest. The "city-escape" during the main holiday periods accordingly requires new transport concepts, the development of public transport (e.g. for same-day trips) or more flexible holiday periods.

Also in Austria, the intensity of travel in urban areas is higher than in rural areas. If we take in this regard Vienna and Burgenland, in 1975 the intensity of travel of the Viennese was with 64.4 % well above the average (36%), for those resident in Burgenland with 16% significantly less. Although in 2013 the travel intensity in Vienna (73%) is still significantly higher than that in Burgenland (48%), the difference was significantly reduced. The above-average increase in the intensity of travel of the rural population is due to the higher participation of all population groups travelling and due to the "catch up" related to travel activity of population groups who have previously hardly travelled (this phenomenon does not apply to the City of Vienna, where a high level of travelling - with regard to persons travelling at least once a year - was registered already at the beginning of the 1970ies). In

addition, the rural population is also influenced by behaviour patterns of the urban population and of populations with a higher intensity of travel. In addition, the decline of the rural population or the number of blue-collar workers, and the increase of white-collar workers and civil servants may lead (due to the development to a service oriented society) to a higher intensity of travel

Economic developments and links to holiday travel

Recently, the weak income growth, particularly in the form of property income, and the rising unemployment has a negative influence on private consumption in Austria. The uncertain economic situation meant that purchasing decisions in consumer durables be postponed and/or holiday trips are not done. In addition, the savings rate in 2013 (Statistics Austria, 2014c) with about 7% reached a new low, assuming that on the one hand available funds are flowing into private consumption (also due to the low level of interest rates), but on the other hand less can be saved.

According to OECD, tourism is a key industry for many countries the service sector and it contributes significantly to the economy and the labour market. In 2012 the tourism sector contributed to the GDP of the 34 OECD countries directly about 5%; about 6% of the workforce in OECD countries was working in tourism (OECD, 2014).

According to UNWTO, in 2012 the 1 billion mark in respect of international arrivals was exceeded for the first time (2013: 1.1 billion), up to 2020 approx. 1.4 billion, by 2030 approx. 1.8 billion international arrivals will be expected (UNWTO, 2013a, b; UNWTO 2014). Despite the financial and economic crisis a significant reduction of the ravel activity is not expected, therefore, although shorter, less frequent and more economical (especially concerning additional expenses, e.g. restaurants); furthermore, a balanced price-performance ratio in the context of travelling is going to become more important.

The urban and cultural tourism is resistant against declines as those visitors usually belong to a higher income group and e.g. increases related taxes have less impact on their travel behaviour, therefore. Urban tourism is booming and this growth is partly due to residents of cities. Urban tourism is dominated by source markets, which have the highest relative growth rates (e.g. CEE, Asia, etc.), city tourists come even from urban areas, which are known to grow faster than rural areas (Smeral, 2014).

4.3 How can long-haul destinations profit from the results of these surveys?

To show how even far away outbound destinations could benefit from the results of these surveys, we are giving insights about long-term trends, interests, motivations and decision-processes that are necessary to understand tourist behaviour, together with all the necessary information on how to address the potential guest. This will be illustrated with examples form the German market (based on unpublished results of the Reiseanalyse 2014 (FUR, 2014)):

Long-haul trips to destinations outside Europe and the Mediterranean increased from a market share of 5% of all holiday trips in 2003 to 7% in 2013, representing a volume of 5 million trips. The growth was mainly due to a rising demand for Asian destinations. As a tool designed to support marketing and planning decisions, the Reiseanalyse not only covers aspects of actual travel behaviour, but is also measuring the future interest of the German population in going to different holiday destinations. Here the results show that in the last decade, the interest in going on long-haul trips grew even faster than the actual demand, and again by doubling the expressed interest, Asia of shows the biggest increases of all continents. This makes it worth to take a closer look on Asia and to show some details about our host country Japan.

In 2013, Asia was the destination of 2% of all holiday trips of the German population. 61% of these trips went to Southeast Asia, 20% to East Asia and 19% to South Asia. With this distribution of destinations in mind, it is not surprising that sun&beach holidays (59%, multiple answers possible) are the dominating form of holiday, followed by adventure/experience holidays (40%), sightseeing

holidays (35%) and round trips/touring (32%). The trips are quite evenly distributed over the seasons, with 30% in spring or autumn and 20% in summer or winter. With an average duration of 20 days, they last much longer than the average holiday trip and with an expenditure of EUR 2,150 they are much more expensive (average 2013: EUR 900).

While it is not possible with the Reiseanalyse methodology to look in detail at the travel behaviour to a single Asian country, we can very well use the expressed interest to look at the country level: In the Reiseanalyse 2014, we identify around 6% (4 million) of the German population who are almost definitely planning or generally considering to go to Japan for a holiday in 2014 to 2016. The data then helps you to characterise these potential visitors to Japan: They are much younger than the average German (38 years vs. 48 years) with the shares of the 20-39-year-old being way above average. They are well-off and well educated, coming from all over Germany, with the Eastern part being much over- and the North-western part being much under-represented. Besides Japan they are interested in 28 other international holiday destinations in the years 2014 to 2016 (out of a list of 59 international destinations). This shows how multi-optional the German tourist is: He is interested in much more destinations in the future than he is likely to visit (more about this phaenomenon in Sonntag, 2006).

These results can help the Japanese tourism authorities and tourism businesses offering travel from Germany to Japan to better address the potential visitor to Japan. At the same time they show a clear picture on the total holiday demand in Germany and the competition Japan is facing on this market. Of course these results are only a little glimpse on what is possible with the data, and of course these kinds of analyses can be done not only for Japan but theoretically for all countries and regions interested in the German tourist.

5.   Conclusion

Considering the examples of Austria and Germany, this paper has shown how tourism demand surveys can be set up in different ways with different methodologies to provide sound, reliable results for tourism authorities and businesses. Our conclusion separately deals with the three aspects set-up, methodology and results.

Set-up

There are different successful ways for setting up national tourism demand surveys and keep them running. The paper has shown the Austrian official-administrative approach, of the survey being integrated in the national and European official statistical system, run by the national statistical office and being 100% funded by the state. In contrast, the German Reiseanalyse is a business-driven approach, coordinated by a non-profit association, "crowd funded" by a pool of different clients.

Both approaches have been working successfully for more than 40 years and have their advantages and disadvantages. In the Austrian example the surveys are done by one institution, only and as long as the funding is guaranteed, they can proceed continuously. In Germany, the challenge is to handle the interests of 30+ different clients; on the other hand, the diversification of costs makes the Reiseanalyse less vulnerable to budget cuts in one organisation.

Methodology

As with the set-up, there is not one golden way of methodology for national tourism demand studies. The paper has shown that methodologies for both surveys are well-tested and run smoothly at present. Even though, there are methodological issues that might become critical in the future:

In <u>Austria</u>, the quality and availability of valid telephone numbers has continuously deteriorated during the recent years; due to this – in order to reach 3,500 net interviews – a high gross sample has to be drawn (about 25,000-30,000 per quarter). In view of this costly and time-consuming process in addition to CATI technique related surveys another technique called "Computer Assisted Web Interviewing" (CAWI) is presently evaluated by STAT, which will be firstly applied in the scope of the household budget survey 2014/15. In addition, alternative sampling methods are considered, in which the applicability of random dialing methods such as "Random Digit Dialing" (RDD) are checked. Only parts of the telephone numbers are randomly generated, which largely ensures the selection of unregistered (in public phone directories) landline or mobile numbers (in particular company mobile devices).

In the <u>German</u> Reiseanalyse, we cherish the high quality of data based on face-to-face interviews, in our experience unsurpassed by any other methodology. At the same time, Ipsos is warning us that the prices for face-to-face interviews will significantly rise in the future due to a threatening shift from classical interview methodologies (face-to-face, telephone) to "new" interviews technologies (internet, mobile). To be prepared, we have started the RA online surveys to understand and get used to the "new" methodologies, now supplementing the face-to-face survey but eventually being in the position to replace it, if need be.

In both countries, against the backdrop of easing the burden of respondents and of the moderate use of financial and human resources the verification of other new data sources and alternative ways of data collection in the context of tourism and travel statistics will continue; the evaluation of new electronically available data (e.g. "Big Data"), the inclusion of the Internet related data sources (e.g. via booking platforms; Web Scraping) and the "social web" are going to be major tasks in the near future.

Survey results

The paper has shown how regular national surveys about holiday travel behaviour help to understand tourism developments by itself, help to link tourism development with other developments in society, help to forecast trends for future tourism development and thus help the tourism industry and official bodies responsible in tourism planning, marketing and policy within the country and the destinations.

The travelling of the <u>Austrian and German</u> population has changed fundamentally in the past 40 years due to the increasing prosperity, the longer statutory holiday periods, and significant changes in the travel industry such as decreasing prices in a variety of air travel offers in distant countries. In the population still propagated differences in travel behaviour can be seen depending on the membership to a social class; furthermore, similar patterns of behaviour in rural or in urban regions are obvious.

In recent decades travelling domestically developed steady with a slight increasing tendency while traveling abroad gained importance above average, not least because increasingly more cost-effective and cheap holiday package tours.

Summer holiday trips are stagnating at a high level; nonetheless, traveling in winter is generally gaining importance, especially in the off-season months.

Travelling with the own car will continue to be popular, which is particularly beneficial to near and popular travel destinations of the <u>Austrians and Germans</u>. The airplane gained considerable importance, which let boom long-distance travel.

According to the demographic change, the demand for family vacation falls slightly, but remains a major segment. Against the backdrop of an increasingly multi-cultural and multi-lingual population trips to relatives and friends to the home countries will become more important.

The tourism and travel industry must expect to increasingly deal with older aged guests, guest from urbanized regions, from one-person and single-person households without children, guests with higher education, but also with a higher proportion of people with risk of poverty. - In addition, guests are expected with an increased awareness of quality, since they would expect at least the lived quality, i.e. the facilities should be at least equal to that of their own homes.

These results of tourism demand side data can be used in manifold contexts of decision-making in tourism policy, marketing and strategic planning on the regional, national or super-national level. They can be used to monitor "hard" facts such as Austrian or German visitor numbers to a certain destination with the connected tourist behaviour and spending. On the other hand they can – depending on the questionnaire – give insights about interests, motivations and decision-processes that are necessary to understand tourist behaviour, e.g. by showing a rising interest for Asian destinations, together with all the necessary information on how to address the potential guest.

Most differences between Austrian and German holiday travel behaviour seem to be linked to geography. As in both countries, a majority of the tourists seem to be yearning for nice, warm weather, they have to go south. In Germany this means in most cases, flying towards the Mediterranean, organised in a package holiday, as these destinations are quite far away. In Austria, where the Croatian and Italian coast are "around the corner", this often means travelling by car and booking accommodation individually. The longer and more expensive distance to the destination can also be an explanation on why the Germans are taking longer trips. The reason behind the differences in holiday travel frequency seems to be that a second holiday in the winter (mountains, skiing) is a pretty "basic habit" for Austrians whereas this is not the case for the Germans.

The paper thus enhances a common understanding, what tourism demand related figures are able to provide. It could encourage and convince countries in putting more emphasis on doing more research related to tourism demand and behaviour. Sharing the experiences in this field could create additional awareness concerning the value of these data and improving a better understanding of tourism activities related to its importance for the overall population and economy.

6. Key Words

Travel behaviour, socio-economic developments, travel intensity, holiday trips, sample surveys of individuals

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