



The German and the Austrian travel habits

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

Peter Laimer

Statistics Austria

Directorate Spatial

Statistics

Ulf Sonntag

NIT

Head of Market

Research

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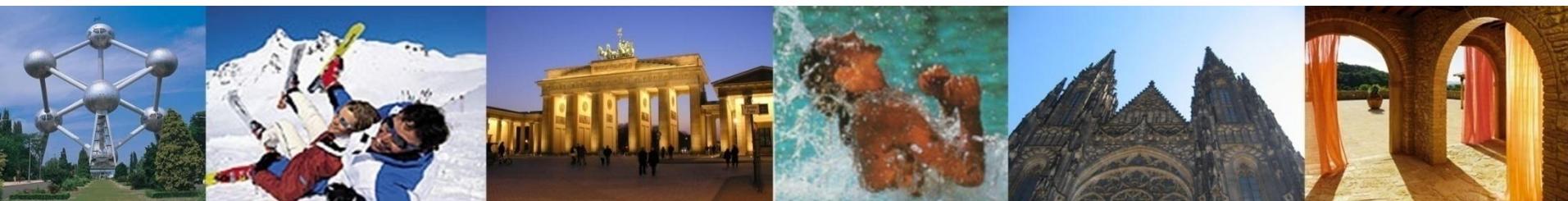
- **Introduction:** The need for national tourism demand surveys
- **Set-up:** How to finance and keep running these surveys
- **Methodology:** How to conduct these surveys
- **Results:** What can they show? How can they help?
- **Conclusions**



The need for national tourism demand surveys





- In the 1960s/1970s tourism became a **mass phenomenon** in Austria and Germany
- Need to understand tourism demand for **different motivations**:
 - industry (destinations, tour operators, transport) → marketing
 - administration → regulation, policy making
 - society/economy → tourism as part of social life and national economy
- Since 1995 (Directive/Regulation on Tourism Statistics) required by **European law**





Set-up of national demand side surveys in Austria and Germany



	AUSTRIA 	GERMANY 
Study	Austrian official travel behaviour studies	German REISEANALYSE
Background	Administrative driven	Industry driven
Data	Incorporated in the official statistical system	Not part of official statistics
Conducting Body	Official statistical office: Statistics Austria	Non-profit association of the users: Forschungsgemeinschaft Urlaub und Reisen e.V.
Cost per year	~ EUR 200,000	EUR 750,000
Financing	Government (single source)	Shared by 25+ users ('crowd sourced')
Users	Federal Ministry of Science, Research and Economy; Research institutions, incl. universities; travel industry; Austrian National Bank (TBoP); Eurostat; Statistics Austria	Destinations (international and domestic); ministries, administrations; universities; tour operators; cruise companies; hotel chains; travel technology; travel associations; publishing houses
Content/ Methodology	Dictated by legal directives	Dictated by user demand

Survey methodologies – AUSTRIA and GERMANY





	AUSTRIA 	GERMANY 
Universe	Austrian population aged 15+	German-speaking population aged 14+ (face-to-face) 14-70 (online)
Frequency	quarterly	annually (face-to-face) plus biannually (online)
Sample size (net)	3,500 interviews per quarter	8,000 interviews face-to-face plus 5,000 online interviews per year
Survey method	„Computer Assisted Telephone Interviews“ (CATI)	Face-to-face interviews plus online interviews
Sampling	Register-based, official telephone book	Random-route (face-to-face) and online access panel (online)
Interview duration	Max. 15 minutes	60+ minutes (face-to-face) max. 20 minutes (online)
Survey coverage	<ul style="list-style-type: none"> • holiday trips 4+ nights: comprehensive questionnaire • short-term holiday trips: comprehensive questionnaire • business trips: comprehensive questionnaire • same-day trips: basic data 	<ul style="list-style-type: none"> • holiday trips 4+ nights: comprehensive questionnaire • short-term holiday trips: comprehensive questionnaire • business trips: basic data • Same-day trips: no data

Methodology: Strength and Challenges



AUSTRIA and GERMANY




	AUSTRIA 	GERMANY 
Strengths	<ul style="list-style-type: none"> • „Visting friends and relatives“ (VFR) and trips to owned dwellings are covered • Same-day tourism and business tourism is covered • Sample of individuals is amenable for extrapolations • Highly informative information that is open to all kinds of analyses (e.g. profile of the trips and tourists) 	<ul style="list-style-type: none"> • continuity and highest possible quality (face-to-face); • at the same time advantages of online surveys such as low cost and fast results; • flexibility to use 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
Quality assurance	Manifold scientific and sophisticated steps of quality assurance	
Challenging issues	<ul style="list-style-type: none"> • Recall issues (i.e. retrospective survey, item non-response) • Coverage and bias (i.e. invalid telephone numbers, non-response) • Comparability (i.e. over time, coherence with other data) • Sample error (depending of no. of cases) 	

Coverage of holiday trips 4+ nights



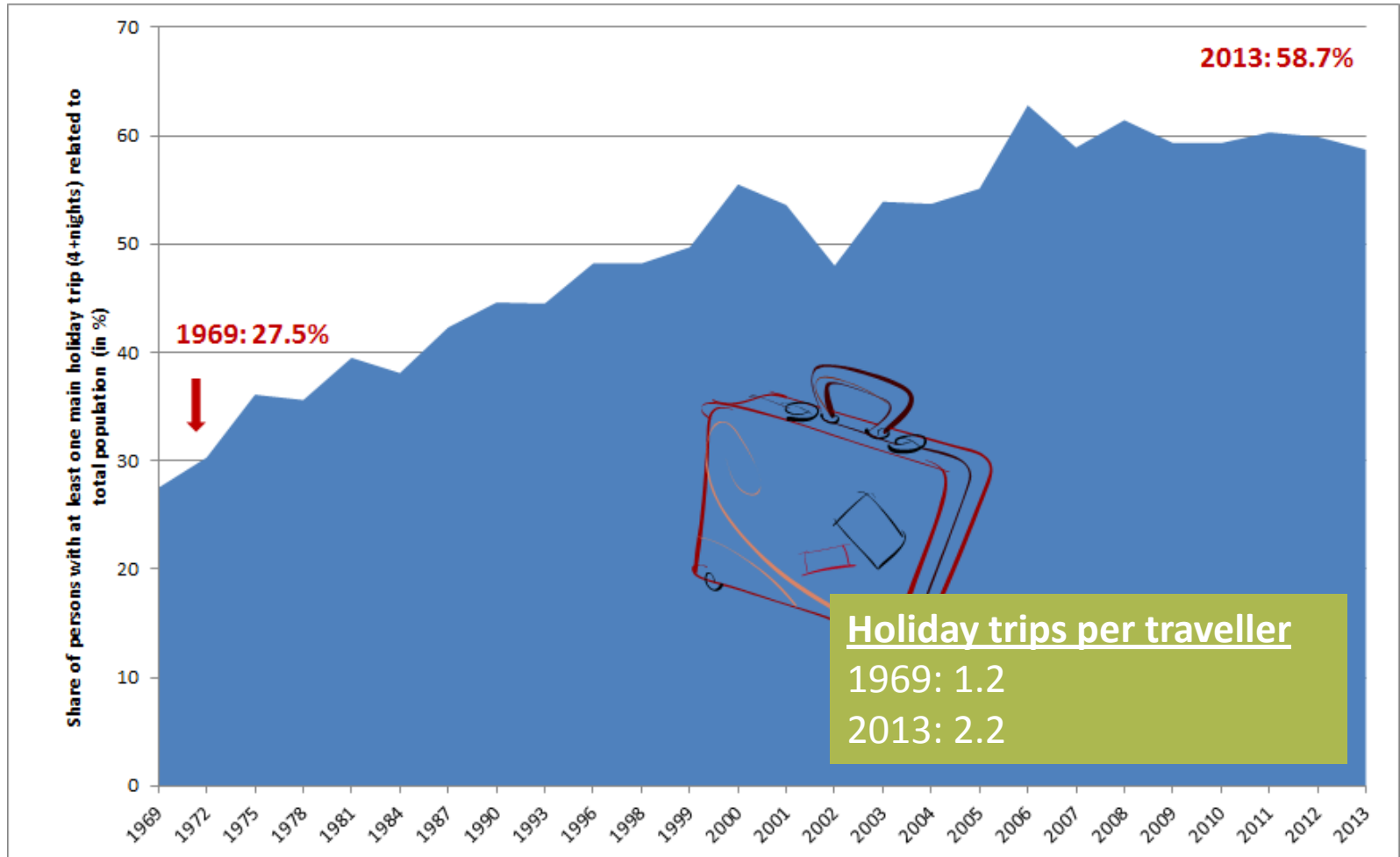
	AUSTRIA 	GERMANY 
Scope	Domestic and outgoing	
Participation	Holiday travel intensity, frequency and total volume	
Travel behaviour	Month of departure, length of stay, destination, organization, means of transport, kind of accommodation, travel group (household members), expenditure, type of holiday	
Additional information	Reasons for non-travelling, booking via internet	Holiday intentions next 3 years (destinations/holiday types); general holiday motivation; general holiday activities; internet use for holiday planning
Sociodemography	Extensive information about personal background	



Variables	Developments and trends in AUSTRIA 
Population (forecasts)	<ul style="list-style-type: none">➤ Increase to 9.0 million in 2030, to 9.4 million in 2060:<ul style="list-style-type: none">• Capital Vienna by +27%• Share of persons under 20 years rather stable, 65 years and older increasing (improving life expectancy)• Increasing foreign born population, until 2060 nearly doubled
Household and family	<ul style="list-style-type: none">➤ Decreasing birth rates➤ Decreasing family sizes➤ Increasing single person households
Urbanisation	<ul style="list-style-type: none">➤ Increasing number of urban residents➤ City escape during main holiday season➤ High travel intensity, due to socio-demographic structure

Situation in GERMANY ...

- Population: Ageing, slowly decreasing, migration
- Household: same as Austria
- Urbanisation: same as Austria



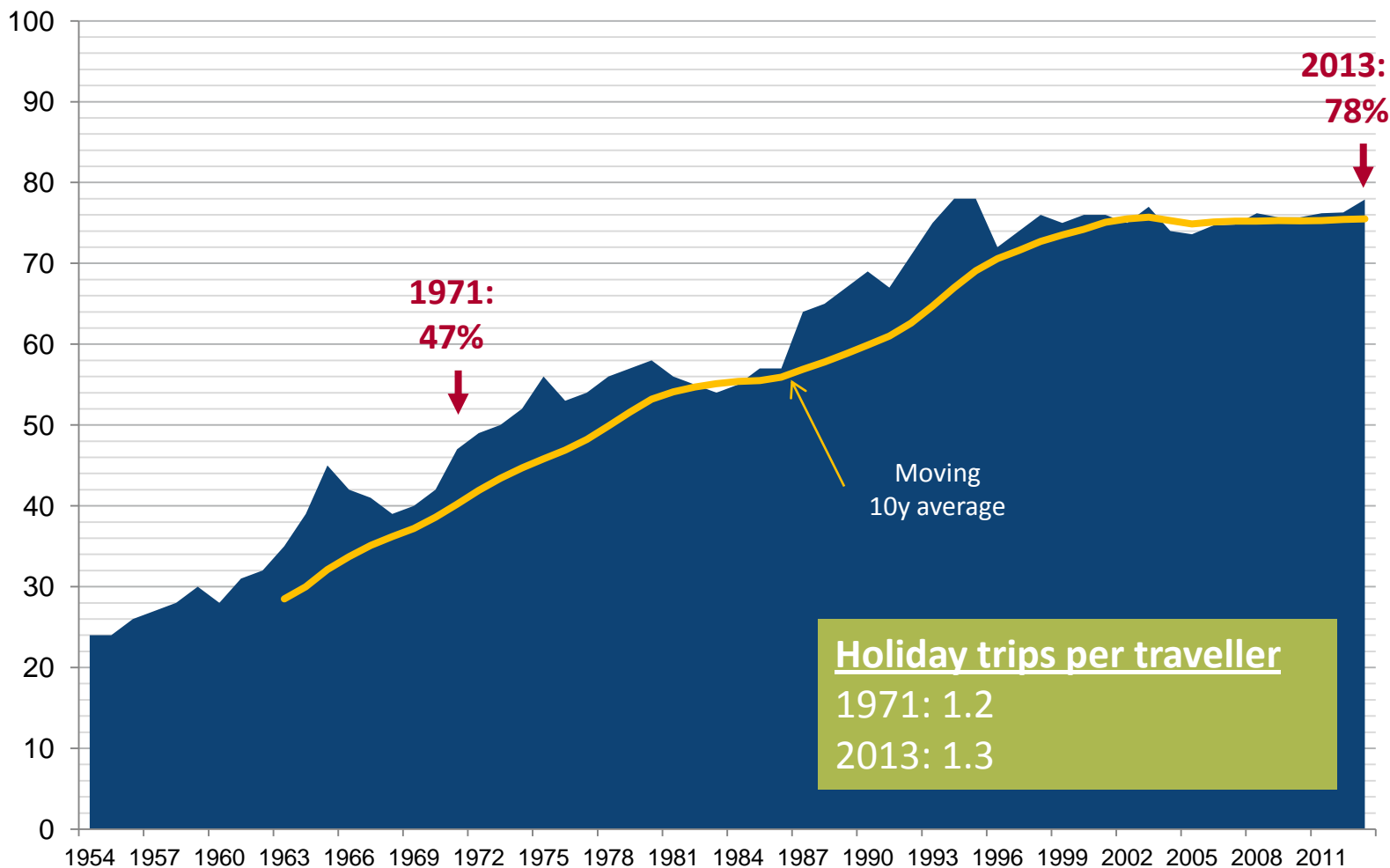
1) With at least 4 overnight stays.



Age	Travel intensity (in %)					Change (in %-points)	
	1993	1999	2002	2009	2013	1993-2002	2002-2013
15-24	45.2	49.4	45.2	64.8	64.0	-0.0	18.8
25-34	44.7	53.4	51.2	61.1	60.4	6.5	9.2
35-44	53.7	56.3	54.8	65.3	63.0	1.1	8.1
45-54	51.4	52.3	50.6	59.1	60.7	-0.9	10.1
55-64	42.4	48.6	47.0	60.1	62.1	4.6	15.1
65+ years	31.0	32.6	28.7	45.8	45.9	-2.3	17.2
Total	44.5	49.7	48.0	59.3	58.7	3.5	10.7

S: Statistics Austria

1) With at least 4 overnight stays.



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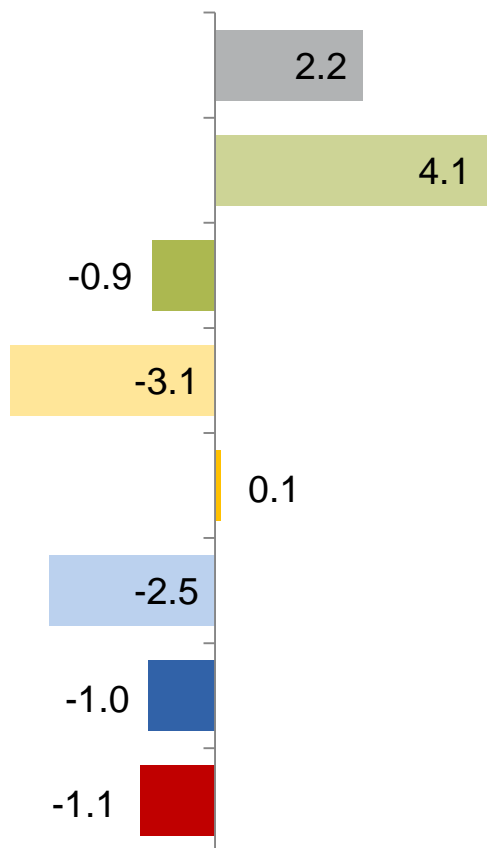


Age	Travel intensity (in % of age group)					Change in %	
	1972	1982	1993	2003	2013	1972-1993	1993-2013
14-19 years	53	61	84	83	84	+58%	±0%
20-29 years	59	59	82	77	79	+39%	-2%
30-39 years	53	56	79	79	82	+49%	+4%
40-49 years	49	57	82	81	82	+67%	±0%
50-59 years	49	53	79	80	81	+61%	+3%
60-69 years	41	48	68	76	77	+66%	+13%
70+ years	33	47	52	63	64	+56%	+23%
Total population	49	55	75	77	78	+53%	+4%

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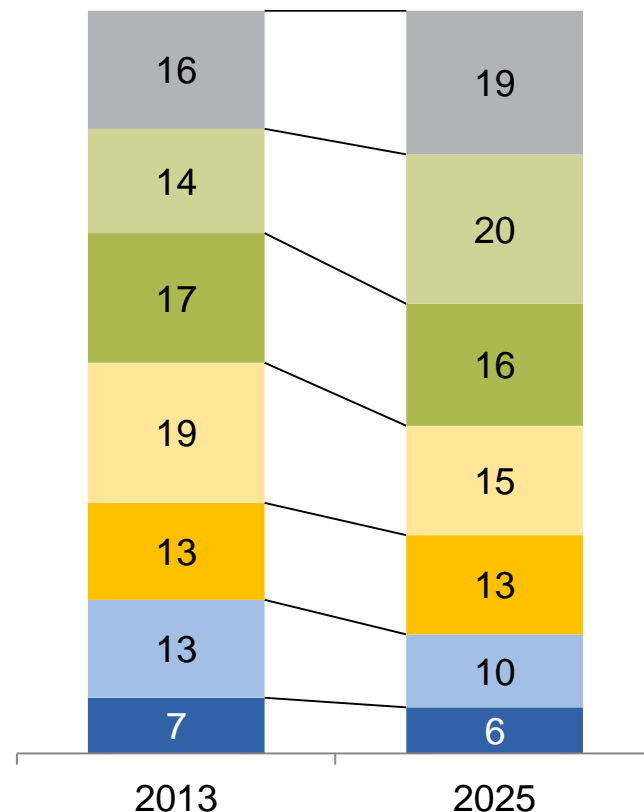
Balance (million) 2013 → 2025



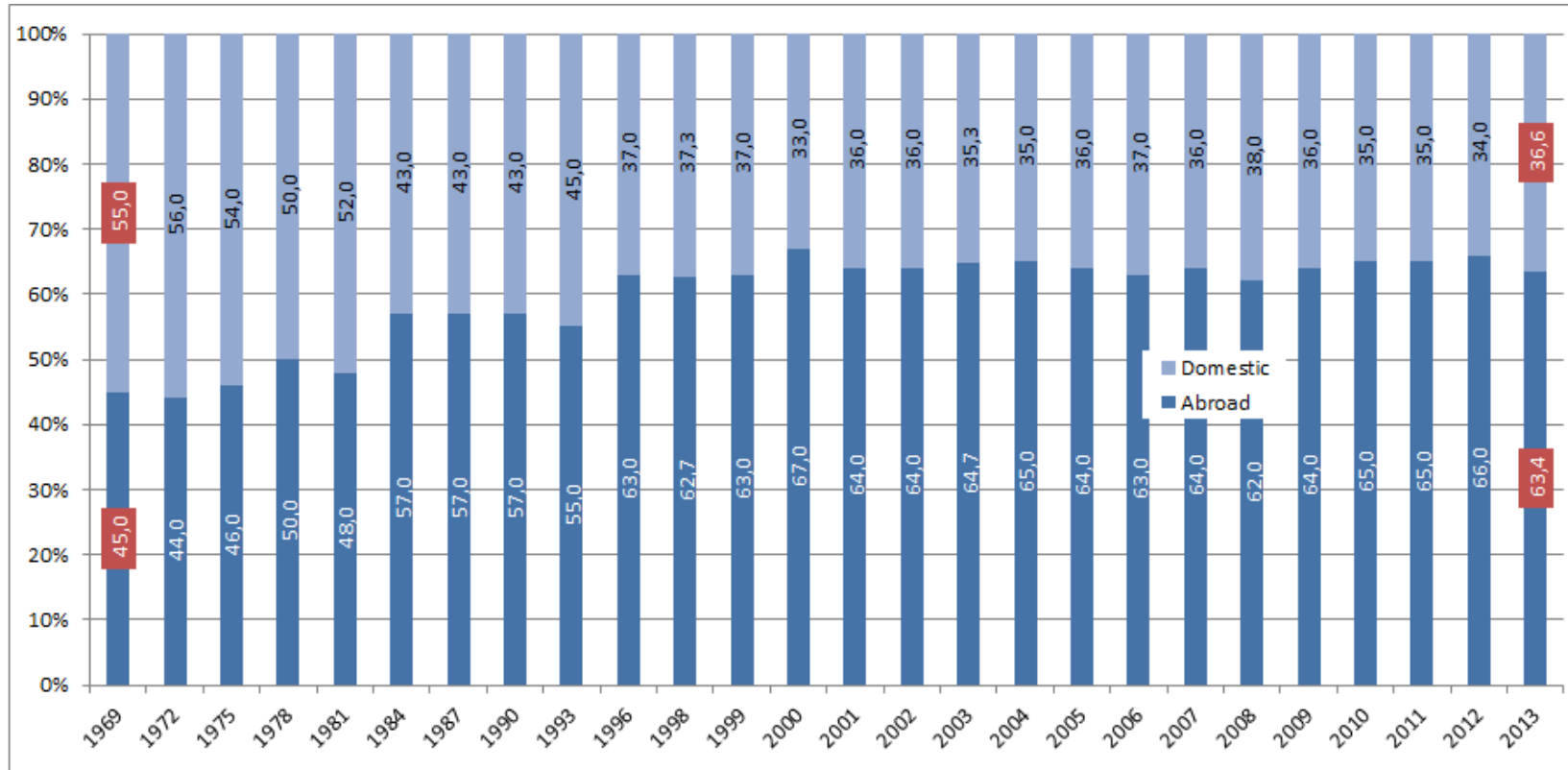
Age



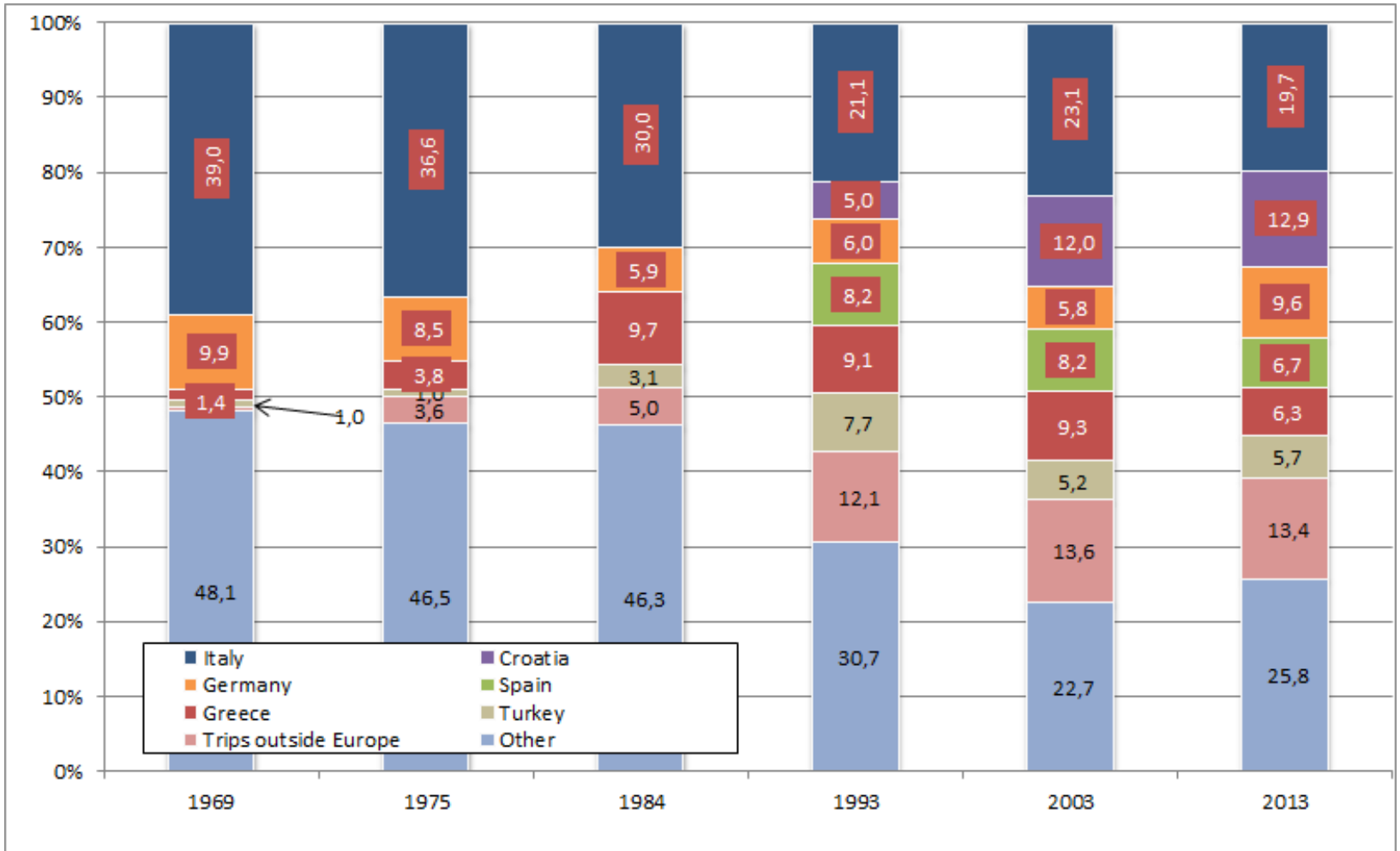
Share of all holiday trips (%)



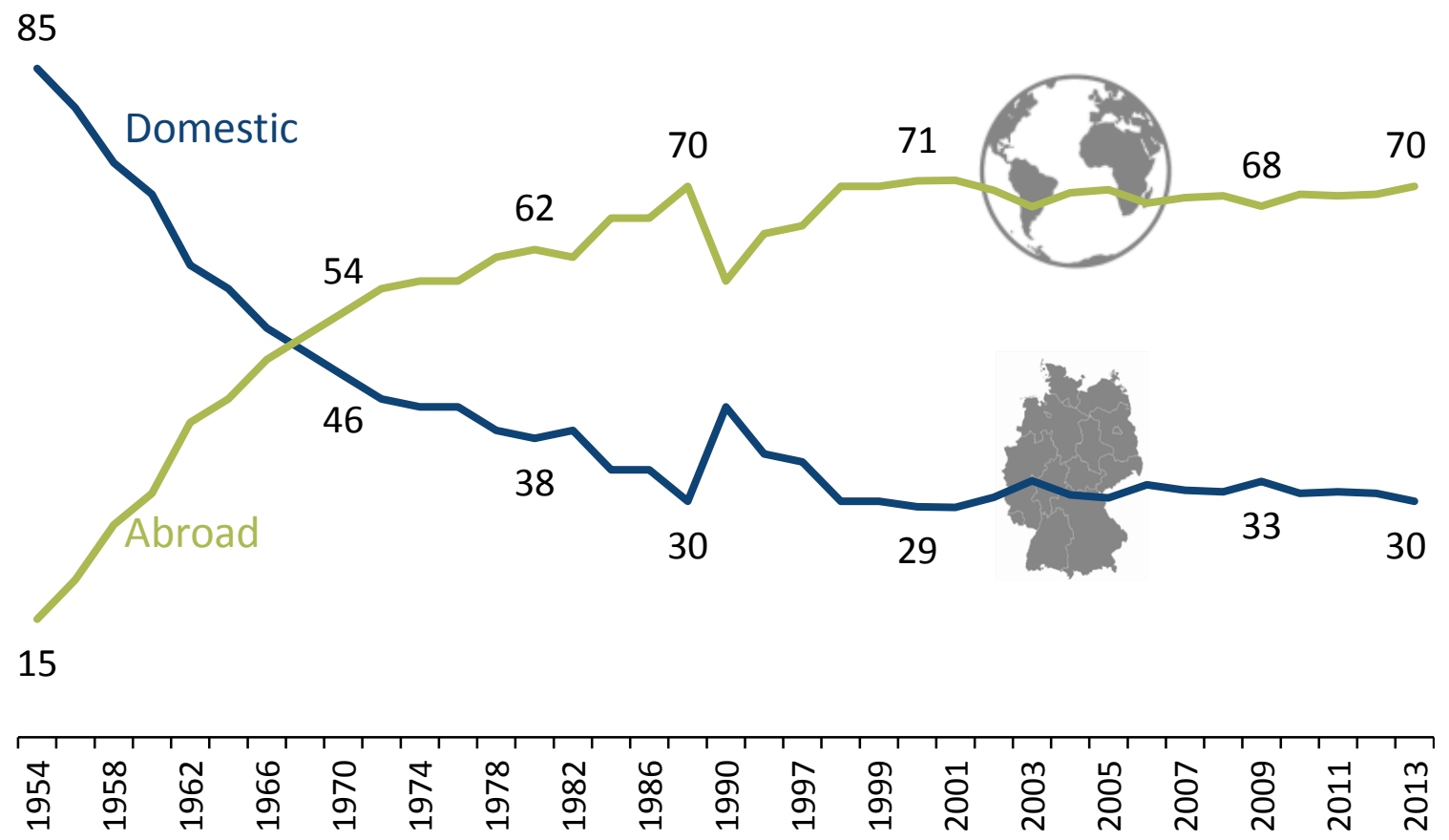
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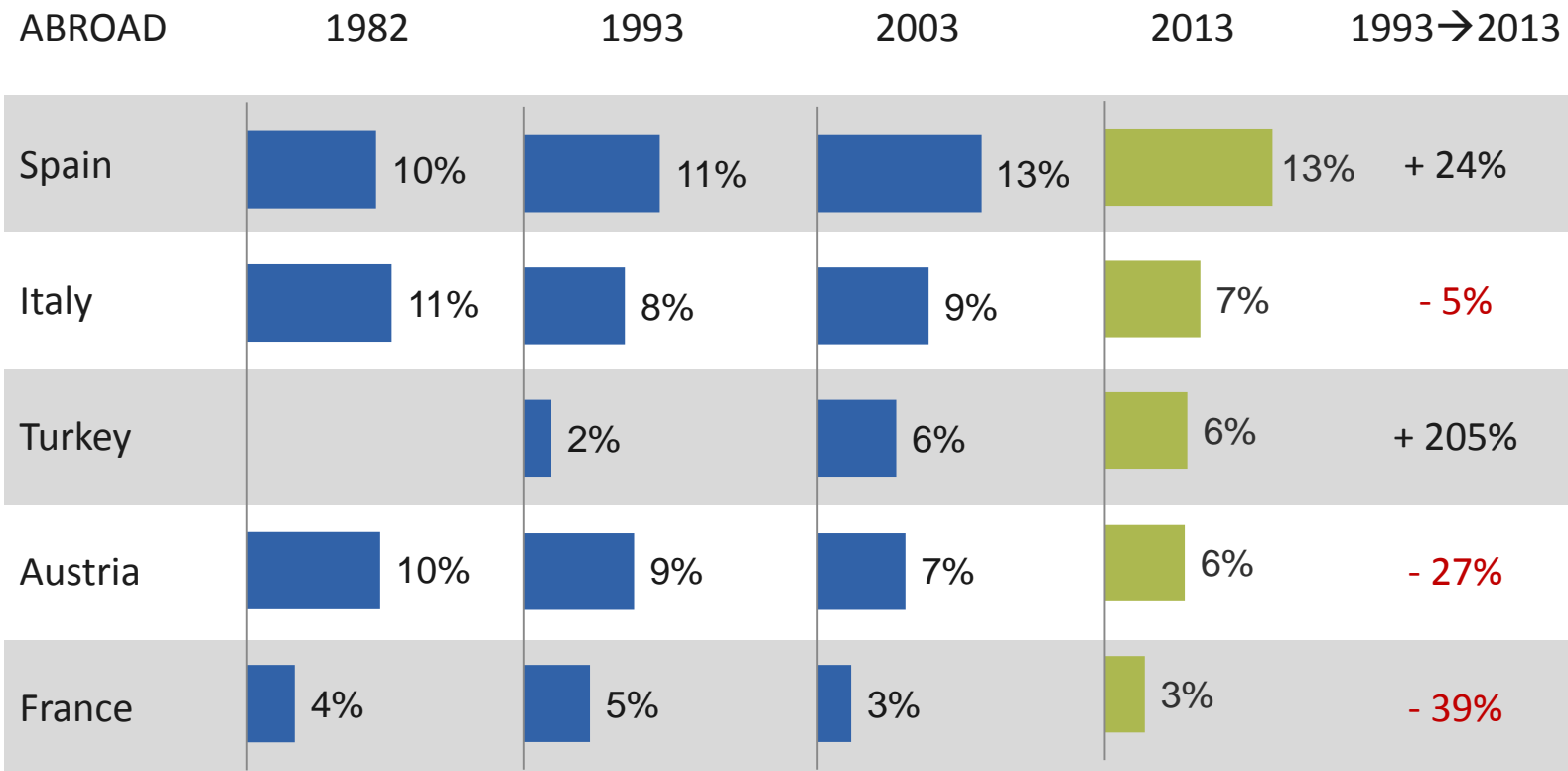
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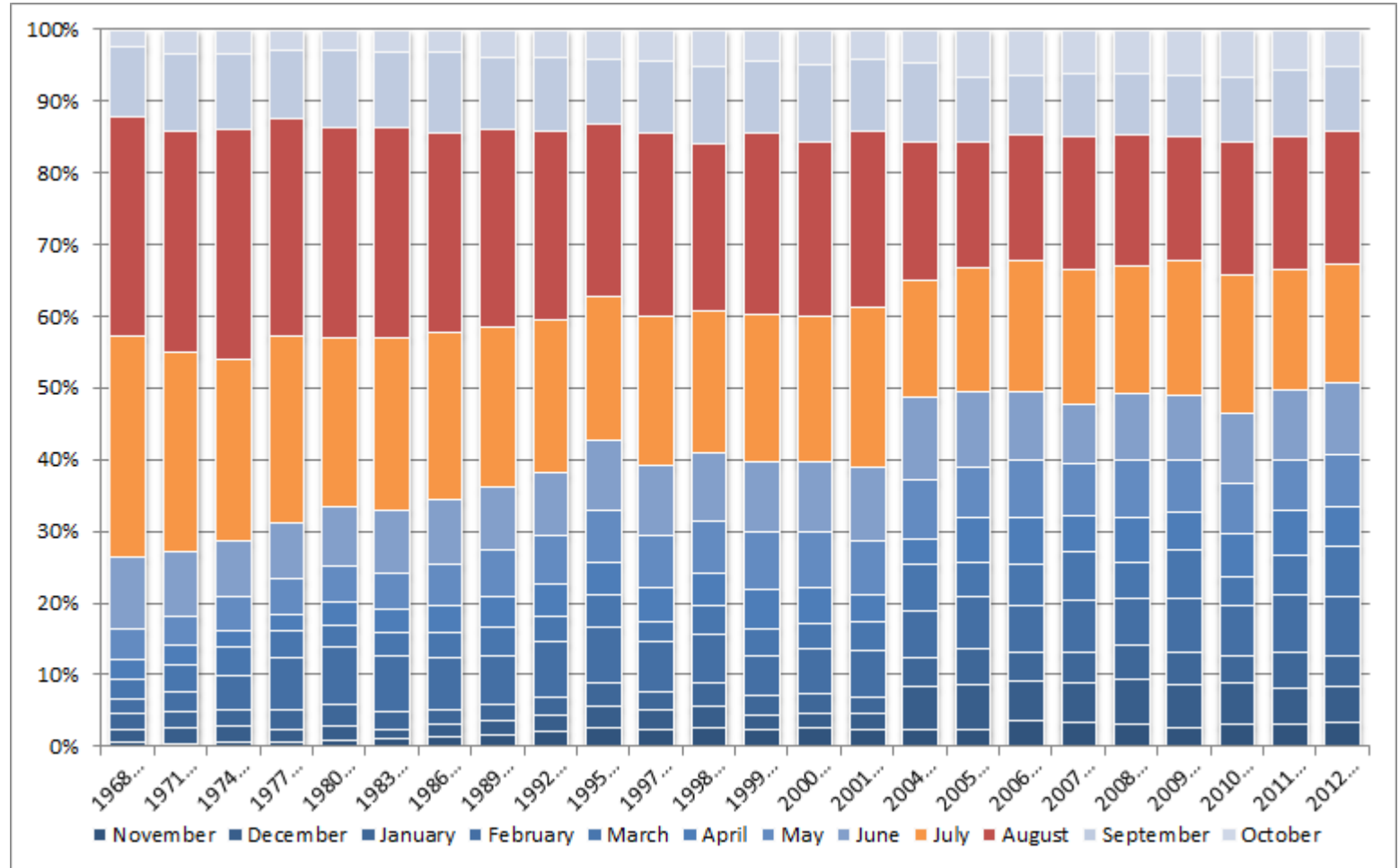
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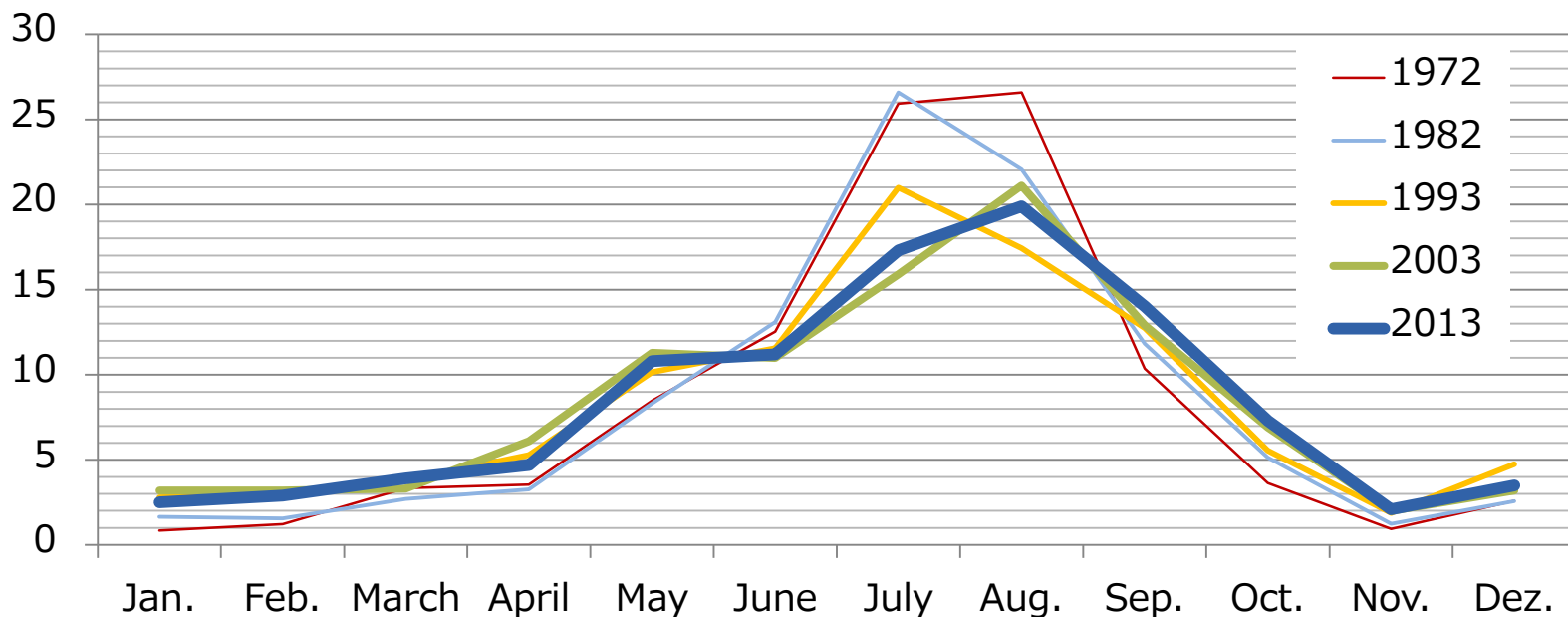
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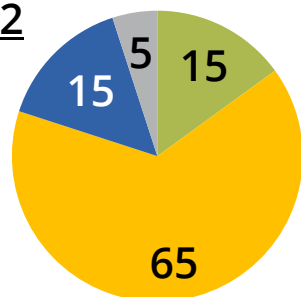
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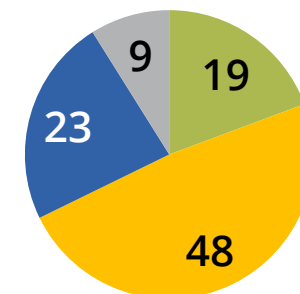
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1972

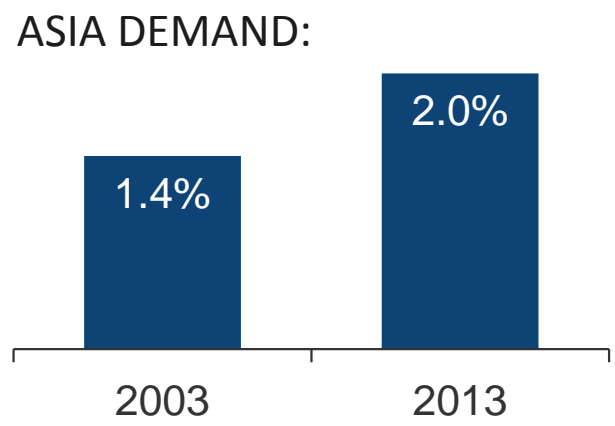
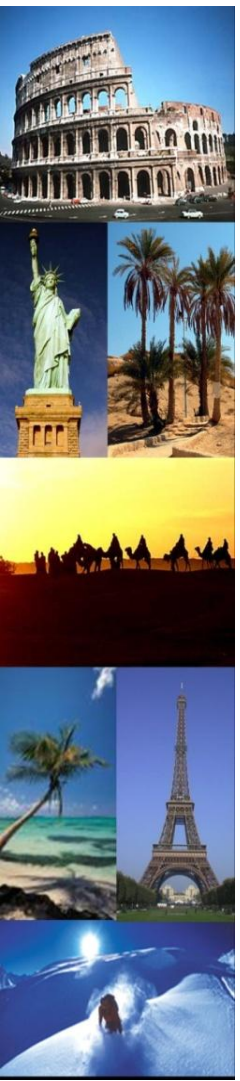


2013

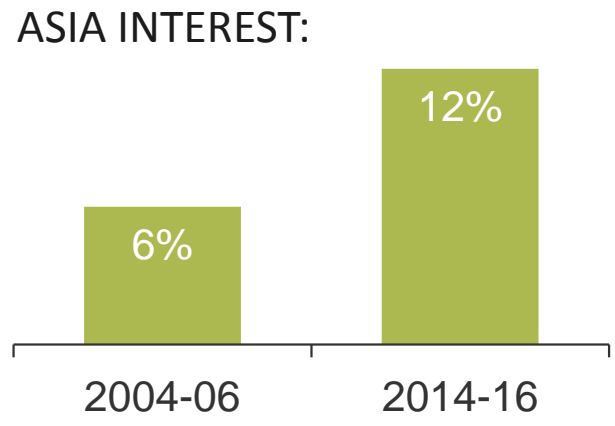


-  Spring (March-May)
-  Summer (June-Aug.)
-  Autumn (Sep.-Nov.)
-  Winter (Jan., Feb., Dec.)

¹⁾ With at least 4 overnight stays.

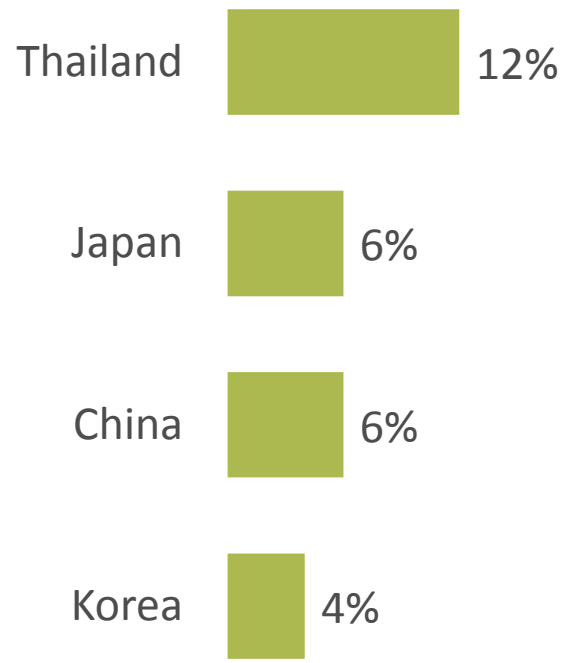


Asia = India, Pakistan, Nepal, Sri Lanka, Maldives, China, Korea, Japan, Southeast Asia (Thailand, Indonesia, Philippines, New-Guinea)
Basis: Holiday trips (5+ days) of the German-speaking population 14+ yrs. (until 2009 only Germans); Source: RA 2004-2014



Asia = South Asia (India, Sri Lanka, Maldives etc.), Southeast Asia (Indonesia, Thailand etc.), East Asia (Japan, China, Korea etc.);
Basis: German-speaking population 14+ yrs. (until 2009 only Germans); Source: RA 2004-2014

INTEREST TO TRAVEL TO ASIAN COUNTRIES 2014-2016 :



Basis: German-speaking population 14+ yrs.; Source: RA 2013

Potential guests to Japan are ...

- Much younger than the average German (38 yrs. vs. 48 yrs.)
- 20-39-year-old way above average
- Well-off, well educated
- From all over Germany; the East being overrepresented, the Northwest being underrepresented

Competition

- Besides Japan interested in 28 international destinations they also like to visit 2014-2016 (out of a set of 59 destinations)
- Multi-optionality of the German traveller: Interested in much more destinations than he is likely to visit.





Set-up	<ul style="list-style-type: none"> • Business-driven versus legal/administrative-driven approach • Level of diversification of costs
Methodology	<ul style="list-style-type: none"> • Decreasing number of valid telephone numbers • Increasing cost for face-to-face interviews in the near future • Evaluation of alternative methods (RDD, CAWI, Big Data, etc.)
Results	<ul style="list-style-type: none"> • Travelling influenced by socio-demographic (age, education, single households, etc.), and social developments (leisure time, traveling as a primary need, etc.) • Travelling influenced by tourism industry (low prices, air travel offers, etc.) • Domestic tourism rather stable, traveling abroad above average • Winter holidays and traveling in low season gaining importance (seasonal more balanced tourism) • near and popular travel destinations reached by car, air travel gained importance above average
Use	<ul style="list-style-type: none"> • marketing and strategic planning • interests, motivations and decision-processes of travelers • support the common understanding related to tourism demand related figures



Please address queries to:
Peter Laimer
Johanna Ostertag-Sydler

Contact information:
Guglgasse 13, 1110 Vienna, Austria
phone: +43 (1) 71128-7849/7085
fax: +43 (1) 4934300
peter.laimer@statistik.gv.at
johanna.ostertag-sydler@statistik.gv.at

http://www.statistik.at/web_en/statistics/tourism/travel_habits/index.html



Please address queries to:
Ulf Sonntag

Contact information:
Fleethörn 23, 24103 Kiel, Germany
phone: +49 (431) 6665670
fax: +49 (431) 66656710
ulf.Sonntag@nit-kiel.de

www.nit-kiel.de
www.reiseanalyse.de

