

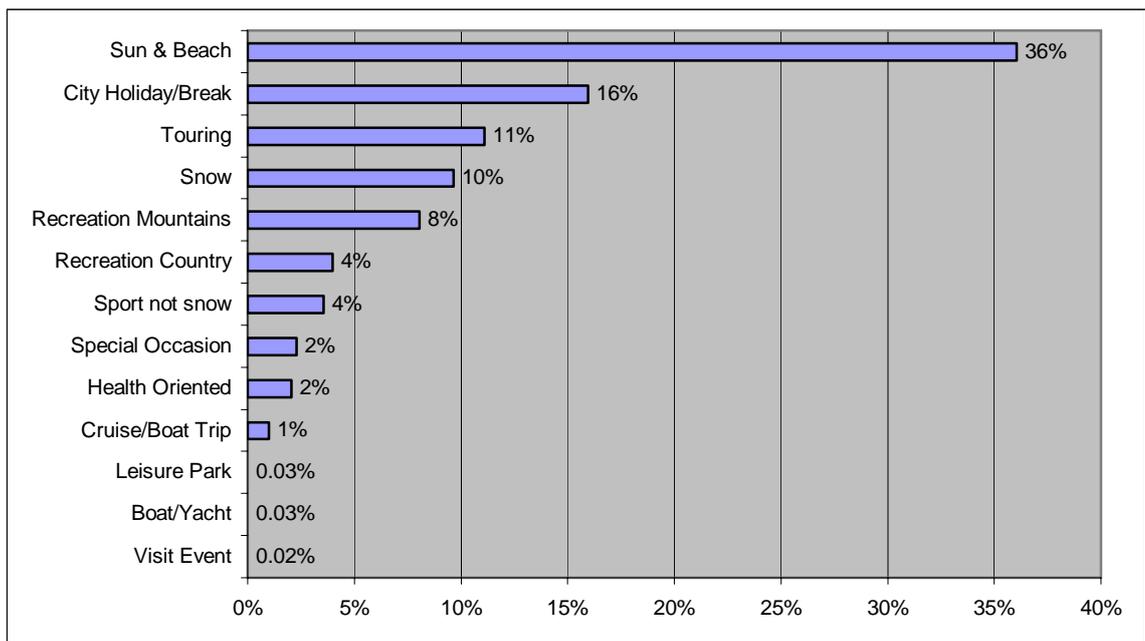
# German Outbound Holiday Profile 2000

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# 1. Type of Holiday

A total of 61.97 million Germans undertook a holiday trip during 2000 in comparison to 58.5 million in 1999, featuring an increase of 3.5 million or 6% over the 12 month period under review. German holiday makers travelled for a very wide variety of reasons during 2000, foremost of which was the sun and beach holiday. No less than 22.3 million Germans or 36% of total had a sun and beach holiday in 2000. The sun and beach holiday was followed in popularity by the city holiday/city break which was the favoured type of holiday of 9.9 million Germans or 16% of total German holiday outbound during the year under review. Third placed in terms of popularity was the touring holiday: a leisure activity undertaken by 6.9 million Germans during 2000, accounting for 11% of holiday traffic during the year.

**Table 1: Type of Holiday taken by Germans, 2001**



Source: European Travel Monitor – 2000; IPK International, Munich

Holidays in mountain locations were very popular for Germans during 2000 with snow holidays in particular attracting nearly 6 million trips or 10% of total. Other activities in the mountains, excluding snow, generated a further 5 million German holiday trips or 8% of total German holiday outbound during 2000.

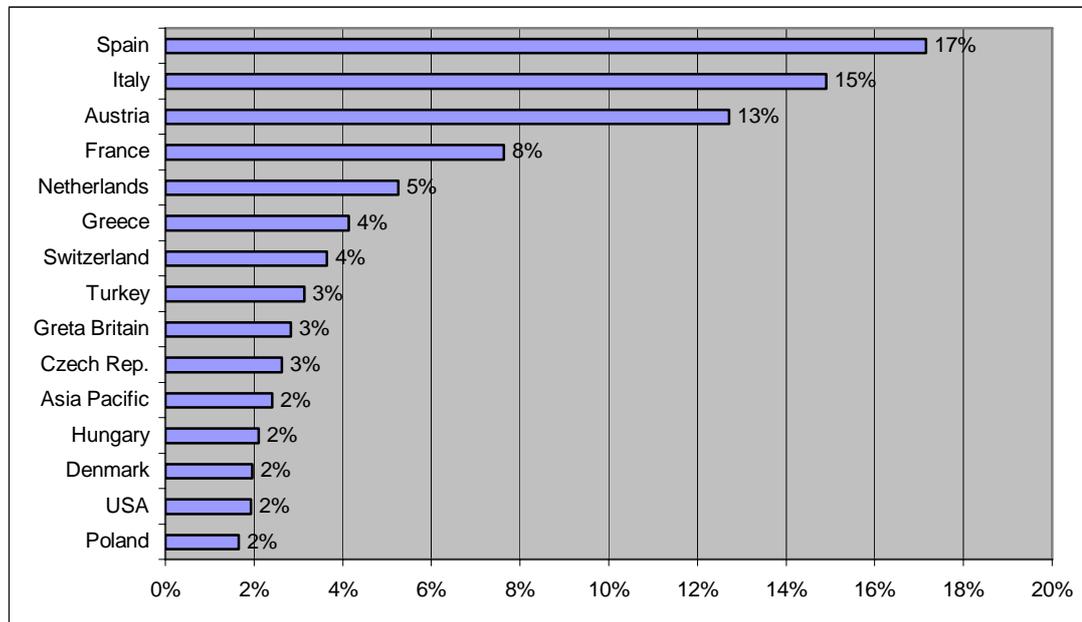
Other holiday recreation in the countryside excluding mountains was enjoyed by a further 2.5 million Germans indicating a 4% share of total German holiday outbound while a further 2.2 million Germans had a sport related holiday that was not associated with snow.

It is interesting to note that almost similar quantities of German holiday travellers in 2000 travelled either for a health oriented holiday or to attend a special occasion. Holiday travel involving cruise ships or boats is found at the lower end having been undertaken by around 1% of total German holiday outbound during the year under review.

## 2. Destinations visited

Given the very high propensity to travel prevailing in the German market it comes as no surprise that German holiday travellers are present in almost every holiday destination imaginable. The chart below lists the fifteen most important holiday destinations for German during 2000, and includes all the destinations visited by at least one million Germans for holidays in that year. These fifteen destinations jointly attracted 85% of German outbound holiday traffic in 2000.

**Table 2: Top 15 Holiday Destinations Visited by Germans, 2000**



Source: European Travel Monitor – 2000; IPK International, Munich

Two main highlights emerge from Table 2. The first is the relative concentration of German holiday making destinations, with the top four destinations, Spain, Italy, Austria and France accounting for 53% of total holiday trips undertaken during 2000. The second is the tendency for holiday trips to be made mostly to other European destinations. In fact only two non-European destinations, Asia Pacific and USA feature amongst the top 15 destinations for German holidays in 2000, each displaying a 2% share.

Spain is by far the Germans' favourite holiday playground having attracted 10.6 million German holiday trips or 17% of total in 2000. Within Spain, the Balearics emerge as the single most important destination with a tally of nearly 4 million German holiday trips, or 41% of total. Mallorca on its own attracted 3.15 million German holiday trips, slightly more than the archipelago comprising the Canary Islands.

Italy was the destination of 9.2 million holiday travellers in 2000, with the largest grouping of 2.6 million visiting the country for sun and beach holiday purposes. However, holiday travel by Germans to Italy tends to be well diversified with a further 1.7 million Germans visiting for city holidays and city breaks. A further 1.5 million Germans had mountain holidays in Italy.

Mountains and the snow associated with them make Austria the Germans' third most popular holiday destination in 2000. In fact, during the year Austria attracted 3.7 million Germans for snow holidays and a further 2.4 million Germans for recreational holidays in the mountains. Switzerland similarly displays a heavy dependence on its snow and mountain offer for the German holiday market.



German long haul travellers feature different characteristics in their purpose of trips. Thus in the case of travellers to Asia Pacific destinations in 2000, the most important type of purpose is the touring element, followed by sun and beach. Whereas touring also emerges as the most important inspiration behind German holiday travel to the USA in 2000, it is followed by city holidays and city breaks rather than beach holidays.

### **3. Destination Profile of Germans' Main Purpose of Visit, 2000**

As is to be expected, the destination profile of German holiday travellers changes according to the purpose of visit. In this section, an analysis is undertaken of the destination profiles of the three main purposes of visit selected by German outbound holiday travellers during 2000.

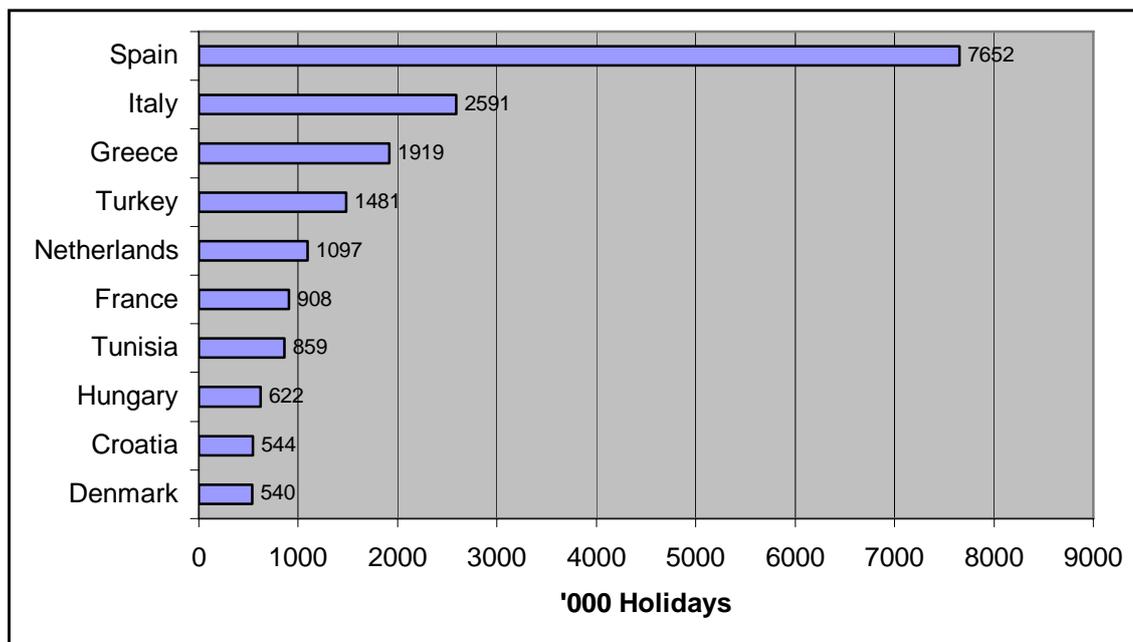
The three main purposes of visit for Germans in 2000 were sun and beach holidays which attracted 22.3 million trips, city holidays and city breaks which attracted 9.9 million trips and touring holidays which attracted 6.9 million trips. Together these three types of holiday activity catered for over 39 million German holidays during the year under review or 63% of total German holiday outbound.

## 4. Sun and Beach Holidays

Coastal countries, and the Mediterranean in particular emerge as the prime components of German sun and beach holiday destinations in 2000. However it is important to note that landlocked countries such as Hungary and its lake-offer also feature as important destinations for German sun and beach travellers in 2000, while non-Mediterranean coastal destinations such as the Netherlands, and Denmark also attract substantial quantities of such traffic.

It is also relevant to note that all the ten main sun and sea holiday destinations visited by Germans in 2000 were of a short haul nature. One in every three Germans going on a sun and beach holiday in 2000 went to Spain, accounting for 7.7 million trips during the twelve month period being analysed. The next top three destinations following Spain all lie within the Mediterranean, with Italy, Greece and Turkey jointly attracting 6 million (26%) German trips in 2000. This implies that the top four sun and sea destination in 2000 were all in the Mediterranean and jointly hosted six out of every ten trips made by Germans during the year.

**Table 3: Top Sun and Beach Destinations for Germans, 2000**



Source: European Travel Monitor – 2000; IPK International, Munich

Tunisia and Croatia accounted for a further two bona fide Mediterranean sun and sea destinations for Germans in 2000, while France with its Mediterranean, Atlantic and Channel coasts emerged as the sixth most popular destination for Germans in the genre during 2000.

Besides the Mediterranean dimension, Germans also travel for sun and sea purposes to other destinations including neighbouring Netherlands, Denmark and Hungary.

## **5. City Holidays and City Breaks**

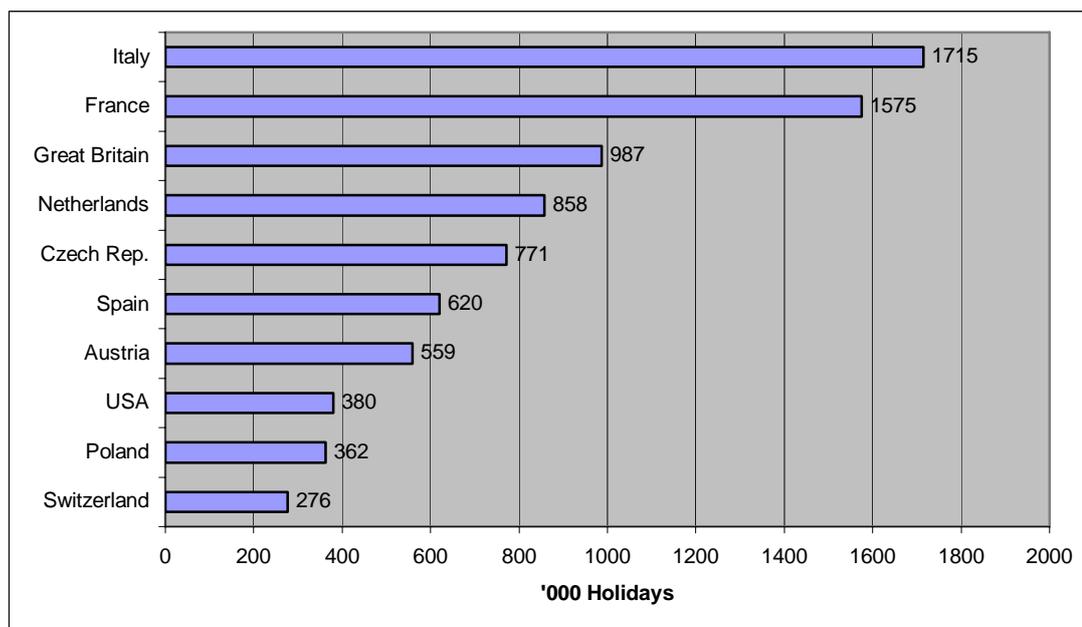
City holidays and City breaks constituted the second most popular type of holiday travel category for Germans in 2000.

Italy was the destination of choice of 1.715 million German city tour and holiday trips in 2000, with a 17% share of total implying that one in every six city holidays and city breaks undertaken by Germans during 2000 were in this culturally and historically rich country.

France closely followed Italy with 1.575 million city break German trips thus claiming a 16% share, implying that a further one in every six German city-based trips visited France. Between them Italy and France attracted around one third of the German outbound market in this niche during 2000.

Whilst Great Britain and the Netherlands occupied third and fourth places respectively as destinations for German city break tourism in 2000, jointly generating over 1.8 million German outbound holiday trips, the Czech Republic also attracted a respectable 0.771 million German trips in this sector.

**Table 4: Top City Holiday and City Break Destinations for Germans, 2000**



Source: European Travel Monitor – 2000; IPK International, Munich

Besides clearly emerging as the Germans' favourite sun and sea holiday destination, Spain also featured as an important city break destination during 2000, having attracted 0.62 million such trips from the German market, accounting for a 6% share.

Germans feature a tendency to undertake this type of travel activity in neighbouring countries as evidenced by the presence of Austria, Poland and Switzerland within the top ten destinations. It is also relevant to note that the 0.38 million German city breaks/trips made to the United States were substantial enough to give this destination eighth ranking in 2000.

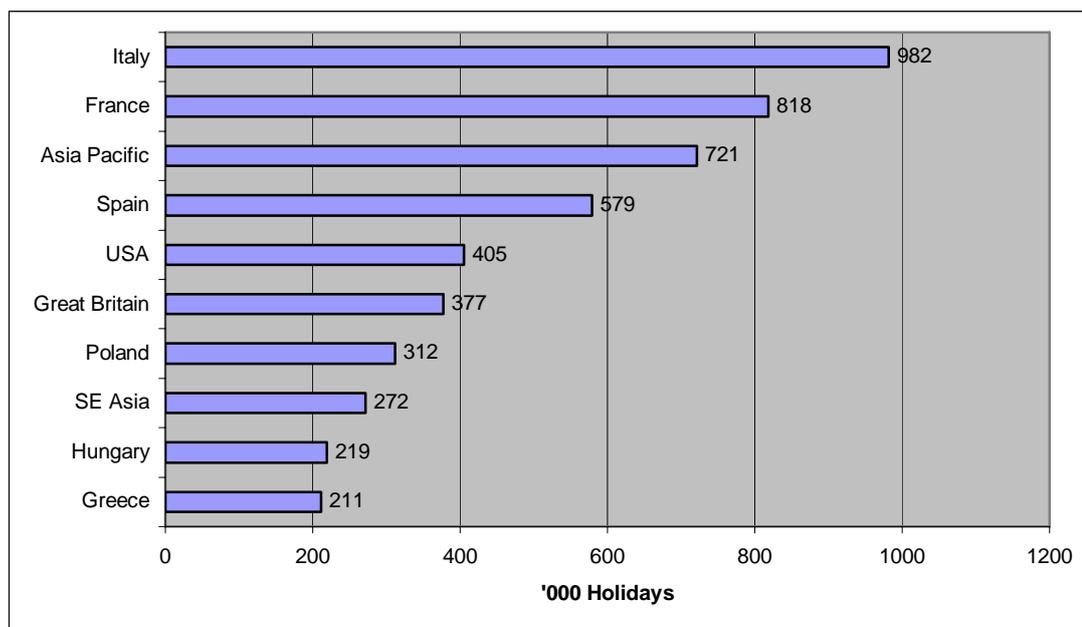
## 6. Touring Holidays

Touring holidays involve a type of holiday activity which involves a more mobile type of traveller whose travel activity seeks to thoroughly explore a destination rather than concentrating on a particular venue or activity.

The data for 2000 features an interesting mix of short and long haul destinations coupled with neighbouring and non-neighbouring destinations for touring activities undertaken by German during the year.

Almost 1 million touring holiday trips were made by Germans to Italy implying a 14% share of such trips while a further 0.82 million touring trips were made to France. These two top touring destination jointly attracted one in every four touring trips made by Germans during the year being analysed.

**Table 5: Top Touring Holiday Destinations for Germans, 2000**



Source: European Travel Monitor – 2000; IPK International, Munich

Three overseas destinations, namely the Asia/Pacific region, USA and South East Asia feature within the top ten touring destinations for Germans in 2000 implying that a substantial number of Germans who visit long haul overseas destinations do so within the touring holiday concept.

Within the short haul market, the remaining destinations are all European and include Spain with 0.58 million touring trips (8%), Great Britain with 0.38 million touring trips (5%), Poland with 0.31 million touring trips (5%), together with Hungary and Greece, each attracting in excess of 0.2 million German touring trips each claiming a further 3% share of total.