



**WORLD TOURISM EXCHANGE CHINA (HAIKOU) 2019**  
**2019中国（海口）国际入境旅游营销大会**

**European Outbound Tourism Market Research**  
**欧洲出境游市场研究**

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## European Outbound Travel Market Overview

- Boosted by the rise of low-cost airlines, the overall European outbound travel market did well in 2018 amid the global economic recession and political uncertainties such as Brexit that have dominated news headlines.
- The uncertainties caused by geopolitics cannot prevent European tourists from traveling, but it will affect where they want to travel. There were new demands generated by some new target groups for customized and personalized travel experience products.
- ABTA research shows that vacations were still the priority spending of the British people, although the pound continues to weaken. 86% of the British population took trips at home and abroad between September 2017 and August 2018.
- The growth of the French outbound travel market was less than the overall tourism industry, of which were a higher proportion of leisure trips in fashion cities.
- More than half (53%) of Germans travel abroad at least once a year. Some organizations predicted that outbound visitors from Germany will reach 5 million by 2020, along with increasing spending.

# Main Characteristics of European Outbound Travel Market



## 1. Expanding Outbound Travel Market with a Trend of Prioritizing Travel Safety

The European outbound travel market continues to grow steadily amid global geopolitical instability. However, European tourists increasingly prefer destinations that they believe are relatively safe, creating opportunities for destinations where safety remain unaffected. At the same time, the affected areas have been stepping up their efforts to boost their tourism. For example, tourists turn their attention to sunny destinations such as Spain and Portugal from traditional ones like Egypt, Tunisia and Turkey.



## 2. Transformation of Tourist Experience

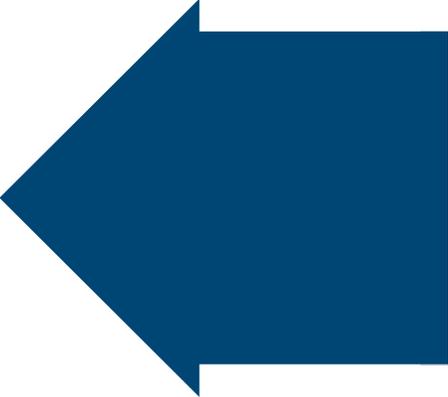
European tourists prefer unique travel experiences for creating unforgettable memory. As a result, they are attracted by authentic experience in non-traditional destinations where they can interact with locals. The unique culture and natural resources of developing countries perfectly match this trend. For example, European tourists enjoy preparing meals with local produce and local people's help.



## 3. Tourists from Mature Source Markets Prefer Personalized Travel

Personalized travel has been becoming a firm favorite for European tourists especially those from mature source markets. Travelers are offered wide and varied options based on their preferences and budgets. As European tourists become more experienced in traveling, they are increasingly interested in trips planned by themselves. This growing trend is particularly clear in the western and northern mature source markets and will continue in the years to come.

# Main Characteristics of European Outbound Travel Market

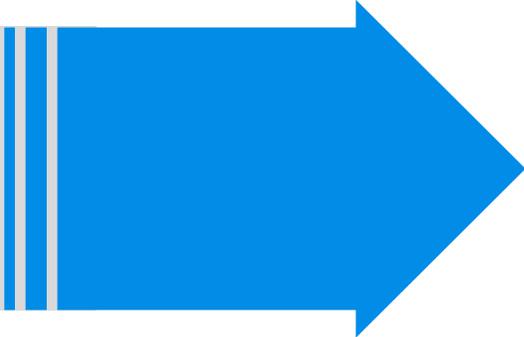


## 4. New Target Tourist Groups Are Emerging

A colorful market filled with new target tourist groups from Europe is emerging. This market awaits exploring by those who can meet specific needs and preferences. New travelers have emerged as the age and family composition of the European population has changed, including high-end tourists, disabled travelers, solo travelers, gay travelers, single parents, etc.

## 5. Professional Online Services Are Becoming a Necessity

In order to attract European tourists, online experience is becoming more and more important. Social media, review sites and blogs are key channels for engaging with potential customers. Social media is becoming a major way for European tourists to plan their travels and access information.



# The German Market





## Travel in Figures

- **Available time:** German people have long holidays with around 25-30 days per year.
- **Duration:** People spent on average **12.9 days** on their main holidays in 2018 → slight decline in duration over the years.
- **Main booking period:** Most main holidays are planned and booked between early November to early April.
- **Number of travellers and trips:** In the record year of 2018, 55 million people went on main holidays (2017: 54.1 mio.)
- **Demographics:** Travel intensity has particularly increased among the age cluster of 65 to 74 (2018: 61% vs. 2017: 50%).
- **Growth market?** Despite the slightly increased travel propensity, travel is **no growth market**: In the past 20 years, travel demand and the number of travellers have levelled off on a high level.
- **Travel expenditure:** Due to a decline in duration, the total expenditure per person has decreased. Expenditure per day and person, however, remains stable. On >70 million trips, the total volume of expenditure was over € 71 billion.



## Booking Pattern

- **Online vs. offline:** In 2018, 43 % of all holiday trips were booked online, 57 % of bookings at a travel agency. However, we see a long--term structural change in holiday booking that is driven by digitization. (Source: DRV, status: July 2019).
- **Holiday organisation:** Package tours are still popular and have been stable for mid-/long-haul trips (2013: 42% → 2018: 40%)
- **Tour operator landscape:** German travellers love their tour operators. With 2,500 TOs and with more than 11,000 travel agencies, and based on the number of residents, Germany has one of the biggest travel agency networks worldwide.
- **Development of TO revenues:** In 2018, TO revenues are on a record high with 36 billion Euros (2016: 31.2 billion)
- **Development of travel agencies revenue:** While revenues of TOs have constantly increased by approx 2.5 % per year, the revenues of travel agencies has stagnated since 2005 on a high level at around 26.9 billion euros in 2018 (2005: 22.0 billion).

## Overview of German Tourists' Outbound Travel Behavior

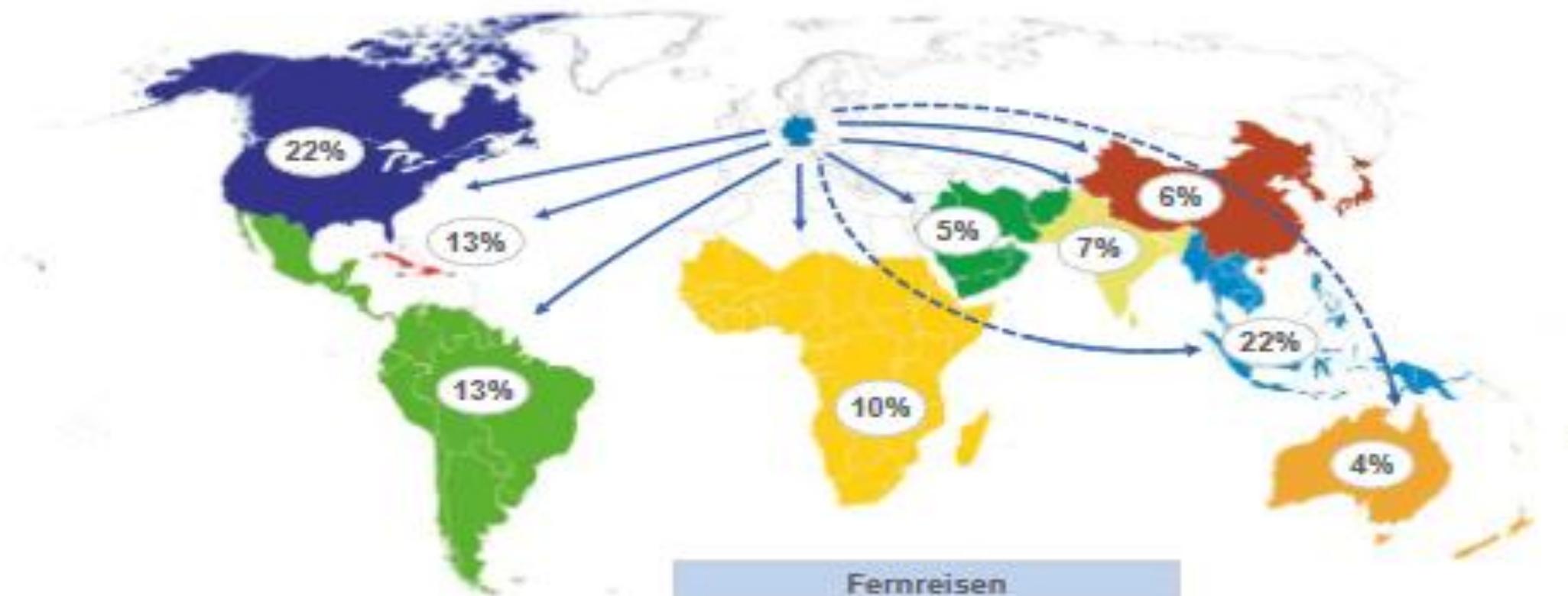
- German travelers aged 35-49 were the majority, but the number of aged 25-34 will continue to increase.
- 73.2% of German travelers took their trips during the peak season lasting from May to August, while Germans travel throughout the year.
- The period of from January to March was the time when German outbound travelers booked their trips.
- Special holiday activities had been becoming increasingly popular, including cruises and camping. In addition, enchanting scenery, attractions and friendly locals have been occupying the top 3 in the list of top 10 reasons why German residents choose their holiday destination.
- 62% of tourists traveled for leisure and 25% for authentic experience.
- German travelers took the most cruise trips in the world.
- It's worth noting that food and accommodation accounted for a substantial percentage of the spending of German outbound tourists.



## Destination Preferences 2018

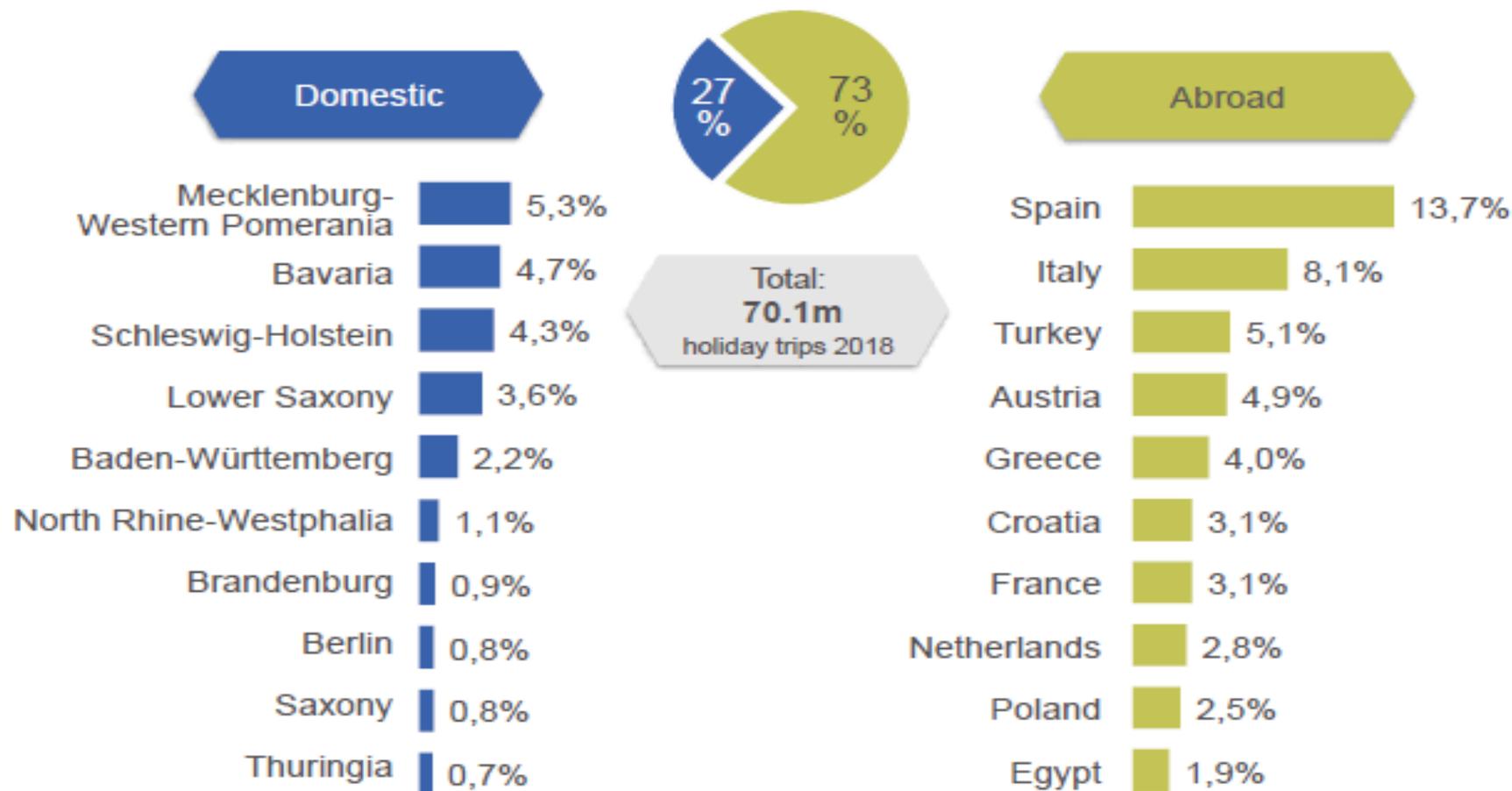
- **High loyalty:** 40% of all Germans are repeaters. On an individual level, however, people vary. Example: They love Spain, but do not always return to Mallorca. Instead, they explore and travel Barcelona and Madrid, the Canary Islands and Andalusia.
- **Destination preferences:** Germany remained the most important holiday destination for Germans, accounting for 27% of all holiday trips. International trips continue to boom: In 2018, 73% of all holiday trips went abroad (2/3 Mediterranean, 1/3 neighbour countries with travel by car). Of the 73%, only **8.1%** were long-haul trips (source: DRV, March 2019).
- **Destination winners:** Generally, among the international favourites, the **Mediterranean** with **36.8 %** of all main holiday trips abroad in 2018 is the Germans' preferred region, followed by Egypt for holidays by the sea.
- **The top five 2018:** Invariable since 25 years and with nearly constant figures (source: RA Reiseanalyse 2019):
  - Spain with constant 14 % (Balearics and Canary Islands, Spanish mainland)
  - Italy with 8 %
  - Croatia with 3%
  - Egypt with 2% for non-Mediterranean destination by the sea

## Long-haul Trips 2018 – Market Shares by Region



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Jahr	Reisen	Marktanteil
2010:	4,5 Mio.	6,5%
2018:	5,7 Mio.	8,1%

## Top 10 holiday destinations in 2018



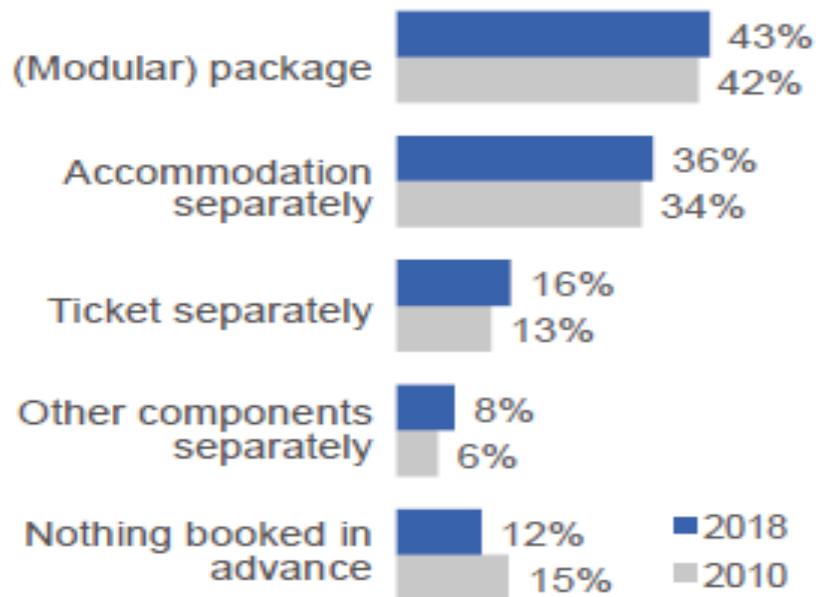
Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over  
Source: RA 2019 face-to-face

## Destination Preferences – the Competitive Set in 2019

- **The bookings for 2019 – status of January: A minus expected**
  - The major destinations in the Mediterranean can expect the bottom line for 2019, at best, a small growth from the German market. In addition, in September, TO Thomas Cook went broke, so these destinations are losing a lot.
  - Of all the destinations that have been booked through online and offline travel agencies so far, there is currently a minus compared to the previous year.
  - Good demand from the German market continues for Turkey. The same applies to Egypt .
  - Less demand was seen for Greece and Tunisia.
  - Spain had a weak start to the tourism year 2018/19 for the reasons outlined above and continued weak.
- **Trends for 2019 – Status of July: The minus confirmed**
  - Strong growth in booking inquiries for short-haul destinations, slight declines for medium-haul destinations. These are some of the results of the hotel ranking, by fww in cooperation with Trevotrend and Holidaycheck.
  - In terms of booking inquiries, 14 out of 17 countries in the fww Hotel Ranking are significantly above the same period last year. In particular, destinations that can be reached by car and train, such as France (plus 159 per cent), Germany (plus 120 per cent), Italy (plus 114 per cent) and Croatia (plus 113 per cent), recorded more than twice as many booking inquiries as last year.
  - Spain, which is a volume market, showed a growth of 11 per cent.
  - Losers are some mid-range destinations such as **Turkey** (minus 9 per cent), **Egypt** (minus 13 per cent) and **Bulgaria** (minus 14 per cent).

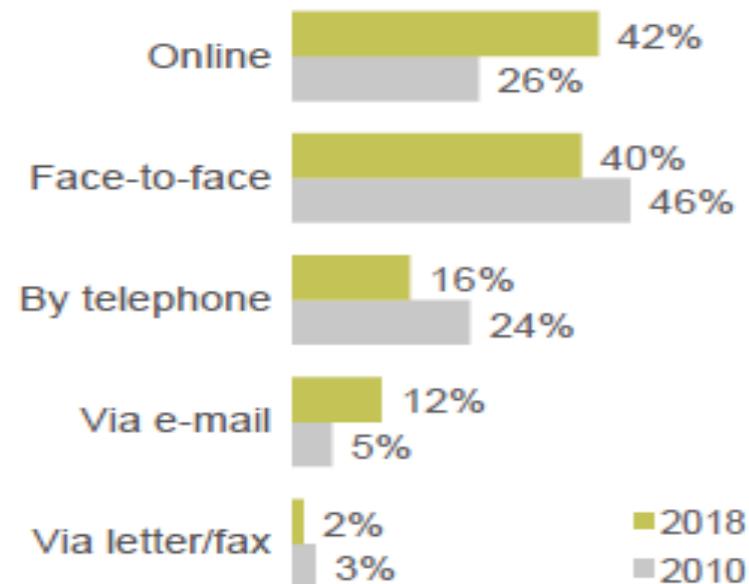
## Holiday organisation and booking in 2010 vs. 2018

### Organisation



Basis: holiday trips (5+ days) of the German-speaking population aged 14 or over

### Booking channels



Basis: holiday trips with advance booking (5+ days) of the German-speaking population aged 14 or over



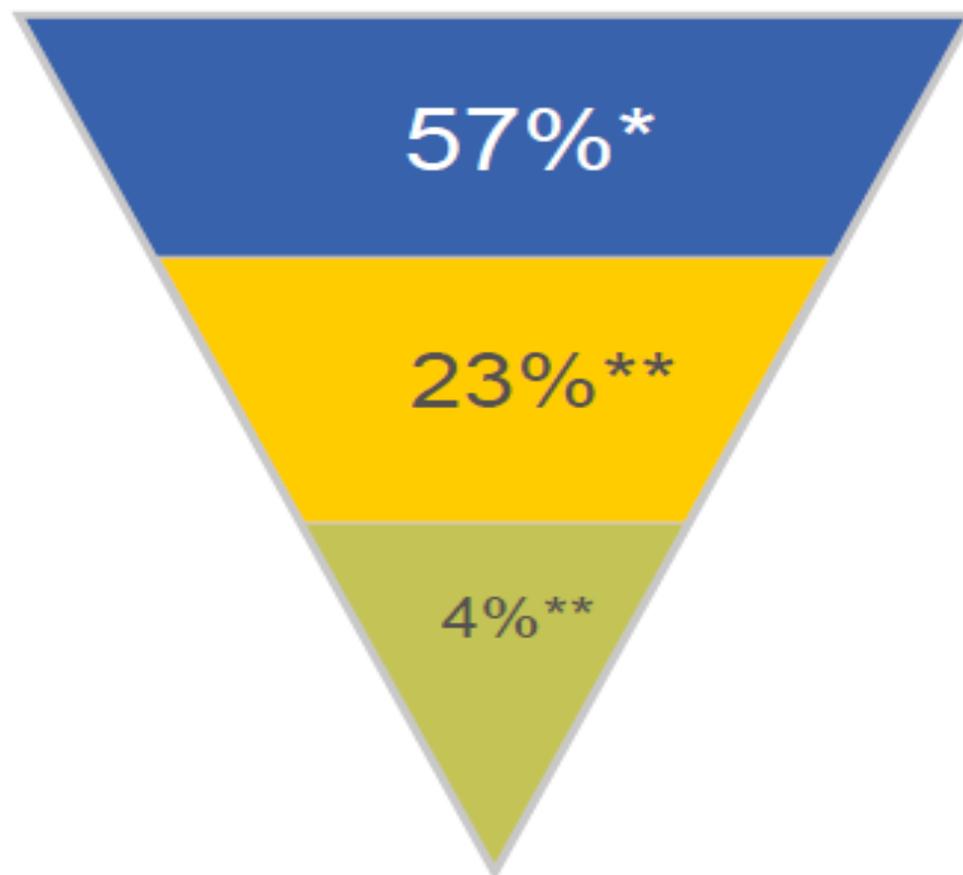
## Travel Spending

- **The average spending** per day of German travellers for their main holidays is 98 Euros. That' s a total of 1,250 EUR per person for an average stay of 12.7 days. This includes all travel costs involved, shopping and going out in the destination inclusive.
- **Attitude:** Travel is regarded a fundamental part of consumption and is thus regarded essential. People save money to allow themselves to travel and save money in their everyday life to be able to go on holidays.
- **Reasons:** The increase in travel expenses can be explained by
  - 1) a higher demand in terms of quality and convenience
  - 2) an increase in flight travel
- **Decisive factor:** The price is a key factor for German travellers. From this price sensitivity, seaside destinations with high value for money benefit such as destinations in Turkey and Greece while especially Spain and Italy have to tackle with late and less bookings due to an increased price level in the destinations and an increased airfare, especially to the Spanish islands. Example: A day in the Canarian Islands is now almost as expensive as a day in the USA (125 EUR vs. 134 EUR).

## The role of sustainability in holiday travel



Bundesministerium  
für Umwelt, Naturschutz  
und nukleare Sicherheit



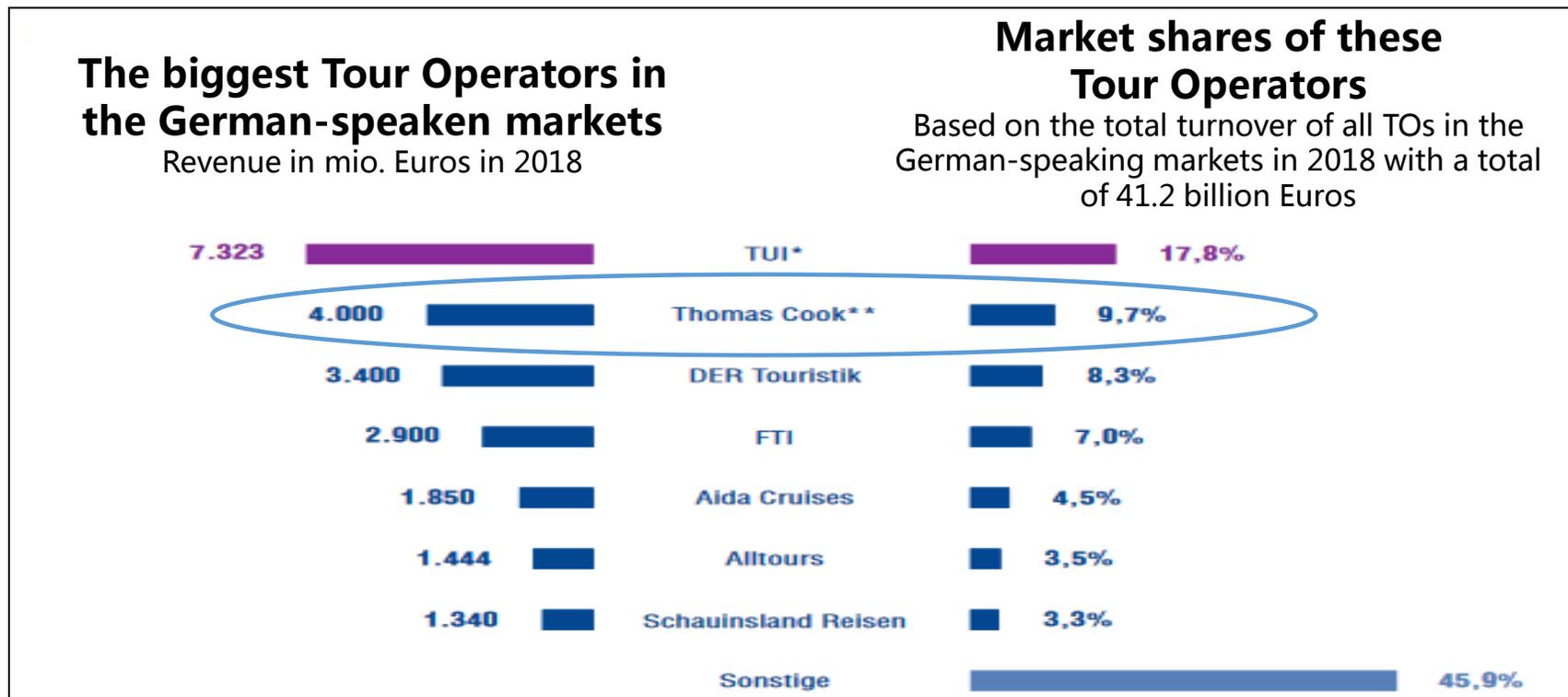
My holiday should be as socially compatible, resource-saving and/or environmentally friendly as possible.

Sustainability was - among other things - one aspect in the planning of the trip.

Sustainability has been the deciding factor in the choice between otherwise equal offers.

Basis: \*Holiday travellers (5+ days) in the German-speaking population aged 14+ years, value for "Is absolutely true" and "Is true";  
\*\* Holiday trips 2018 (5+ days) of the German-speaking population aged 14+ years  
Source: RA 2019 face-to-face

## Tour Operator Market in DACH



- The DACH region is a strong tour operator (TO) market. The TO landscape in all DACH markets is currently facing a fundamental change: Germany's second largest supplier Thomas Cook with a market share of 9,7 % went bankrupt in September 2019.
- Thomas Cook has been a major player in the Germans' favourite travel destinations Spain (focus: Canary and Balearic Islands), Turkey, Greece and Egypt.
- The former and present market leader TUI has announced in mid-October that he was going to fill the gap and expand their capacities in these destinations.

## The UK Market



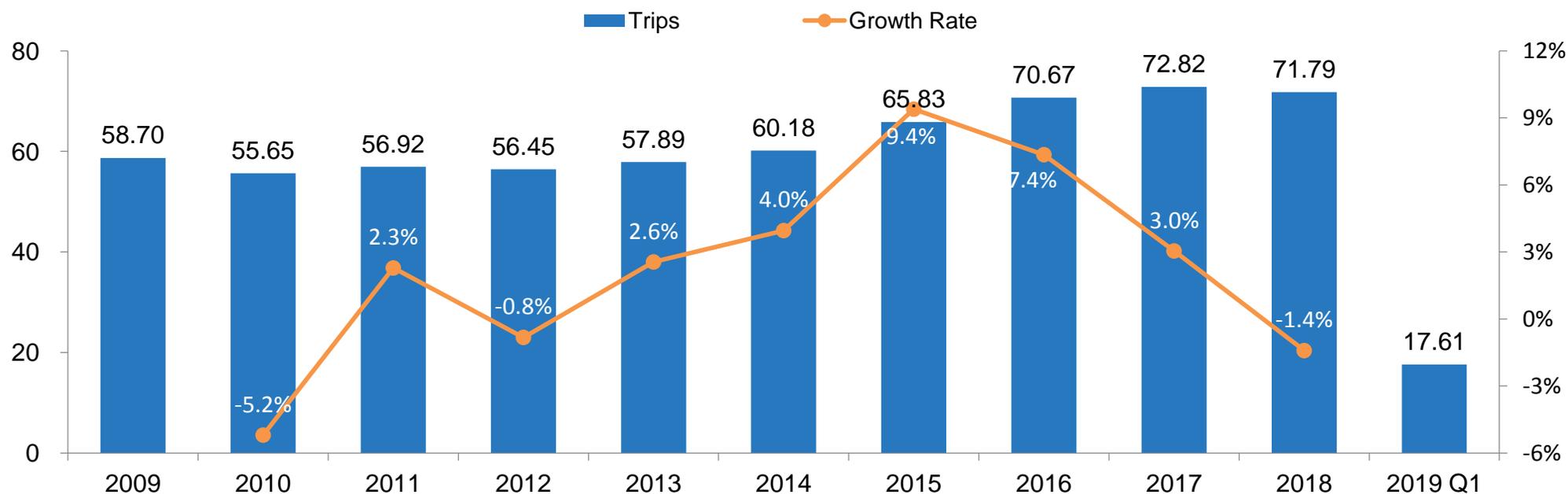
## Trend of UK Outbound Tourism in 2019

- Responsible Tourism Goes Mainstream
- Resurgence of the Trusted Travel Expert
- Wellness Travel is on the Rise
- The Tailor-Made Package
- U.K. Tourists' Experience on a Cruise

## The Number of U.K. Outbound Trips

The number of U.K. outbound tourists had risen steadily between 2009 and 2018. In the first quarter of 2019, the number of British UK outbound trips was 17,61 million, up by 0.23% over the same period last year.

Number of U.K. Outbound Trips 2009-2019 (million)



Source: The Office for National Statistics

## Top Destinations for U.K. Outbound Tourists

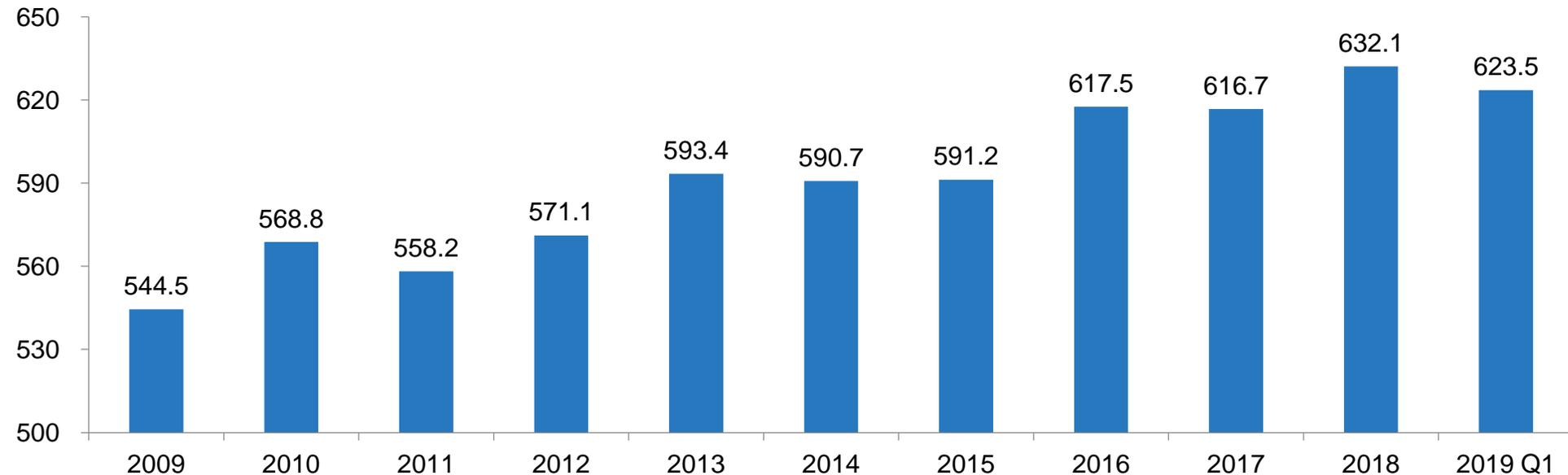
In 2017, the top destinations visited by U.K. outbound travelers were in Europe, with Spain receiving the most with 15.87 million trips.

	Destinations	The Number of Trips (million)
1	Spain	15.87
2	France	8.86
3	Italy	4.16
4	Ireland	3.42
5	U.S.	3.4
6	Germany	2.91
7	Portugal	2.87
8	Poland	2.67
9	Netherlands	2.66
10	Greece	2.38

## Per Capita Expenditure of U.K. Outbound Tourists

Between 2009 and 2019, the average expenditure of U.K. outbound tourists per trip was floating around 540 to 640 pounds, and in the first quarter of 2019, the average expenditure was 623.5 pounds, slightly lower than the average spending in 2018.

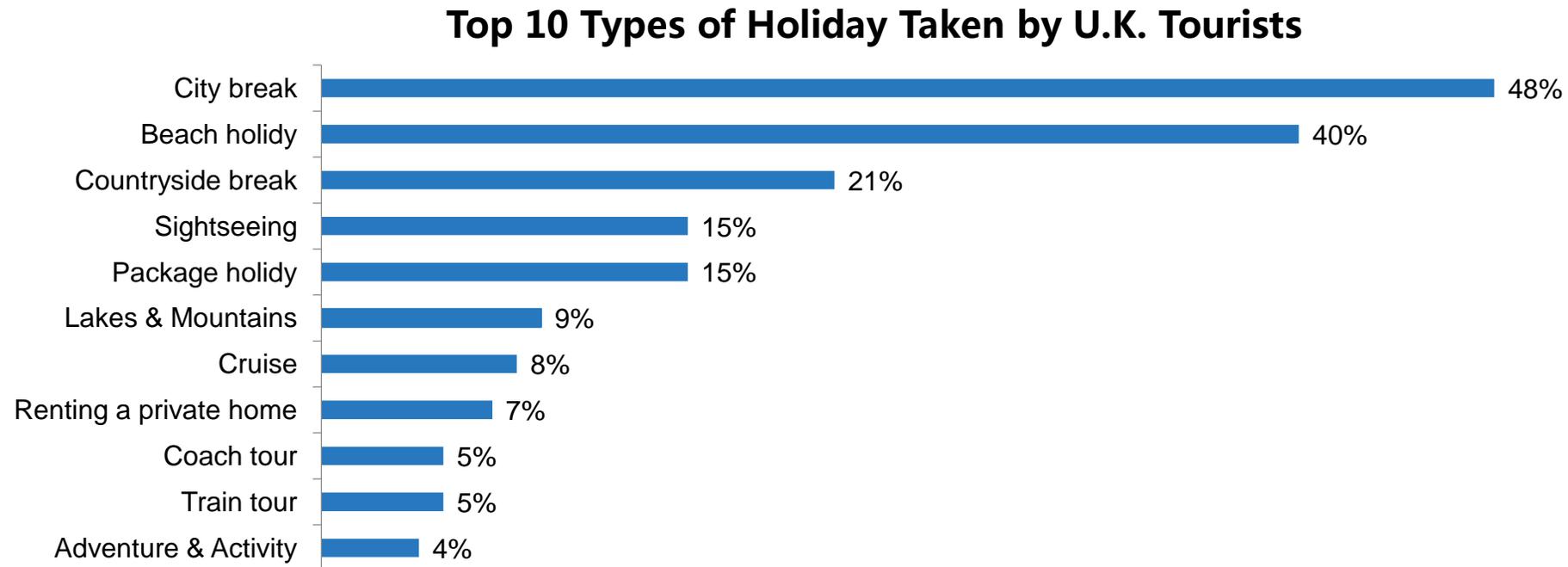
Per Capita Expenditure of U.K. Outbound Tourists per Trip 2009-2019 (in GBP)



Source: The Office for National Statistics

## Top 10 Types of Holiday Taken by U.K. Tourists

Figures show that city break and beach holiday are their favorite among the top ten types of holiday for British travelers. 48% of U.K. tourists preferred city breaks, down from 53% in 2017.

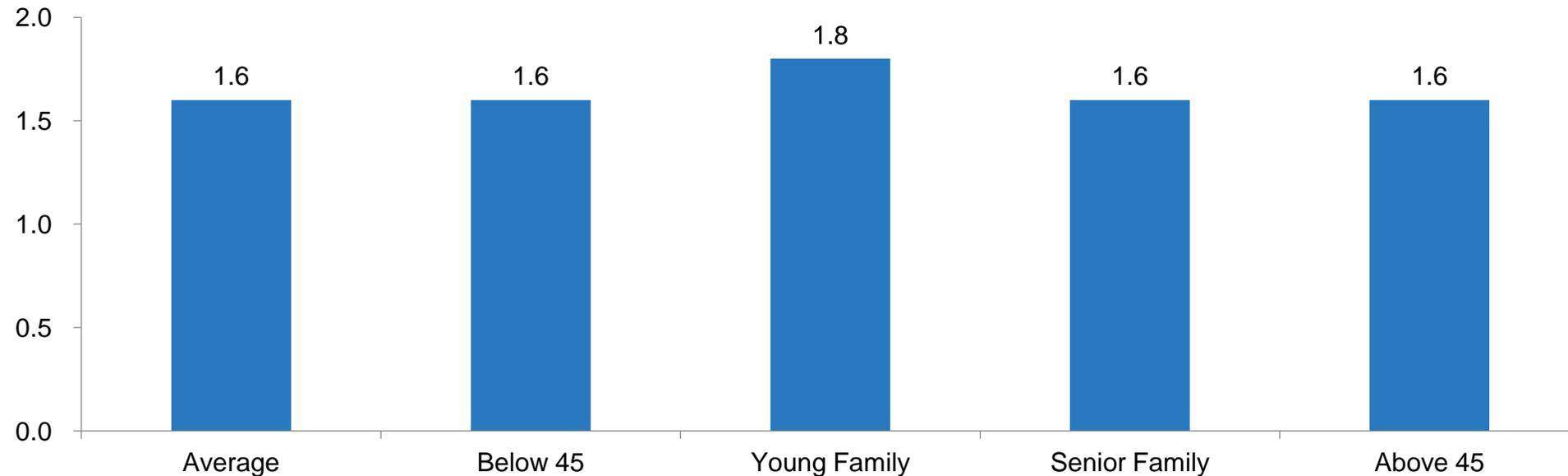


Source: ABTA, Holiday Habits Report 2018

## Average Number of Trips Taken by U.K. Outbound Tourists

U.K. families with younger members aged between 25-34 took the most outbound travels in 2018.

**Average Number of Trips Taken by U.K. Outbound Tourists by Age**

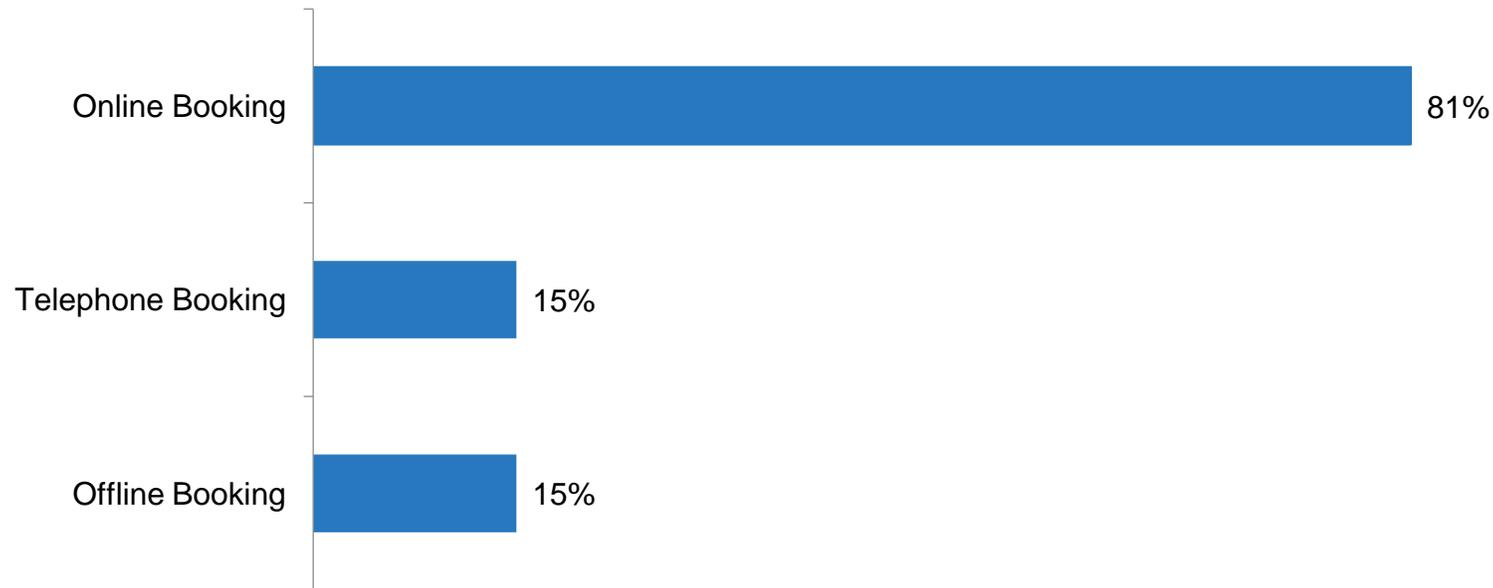


Source: ABTA, Holiday Habits Report 2018

## Booking Methods Taken by U.K. Tourists

In 2018, 81% of British tourists booked their holiday online, down slightly from 2017, but still topping the list of bookings. It's worth noting that people over the age of 65 were most likely to book on the phone, while the youngest group were most likely to let someone else take charge of booking their holiday. The number of people using mobile phones and tablets to book their holidays decreased in 2018, while booking on a PC remained the most popular way to book a holiday.

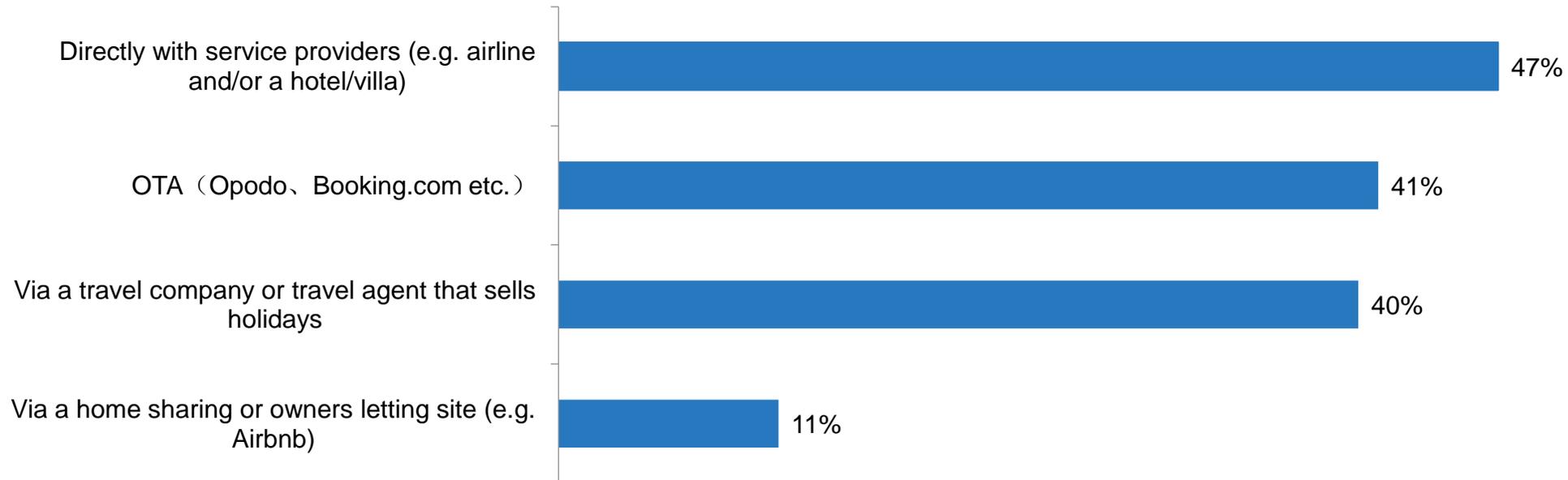
**Booking Methods Taken by U.K. Tourists**



## Booking Channels for U.K. Outbound Tourists

In 2018, 47% of U.K. outbound tourists preferred booking a holiday abroad directly through service providers such as hotels and airlines, up from 43% in 2017. It's worth noting that the U.K. tourists over 65 were the most likely to book a holiday abroad with a travel company or agent (45%).

### Booking Channels for U.K. Outbound Tourists

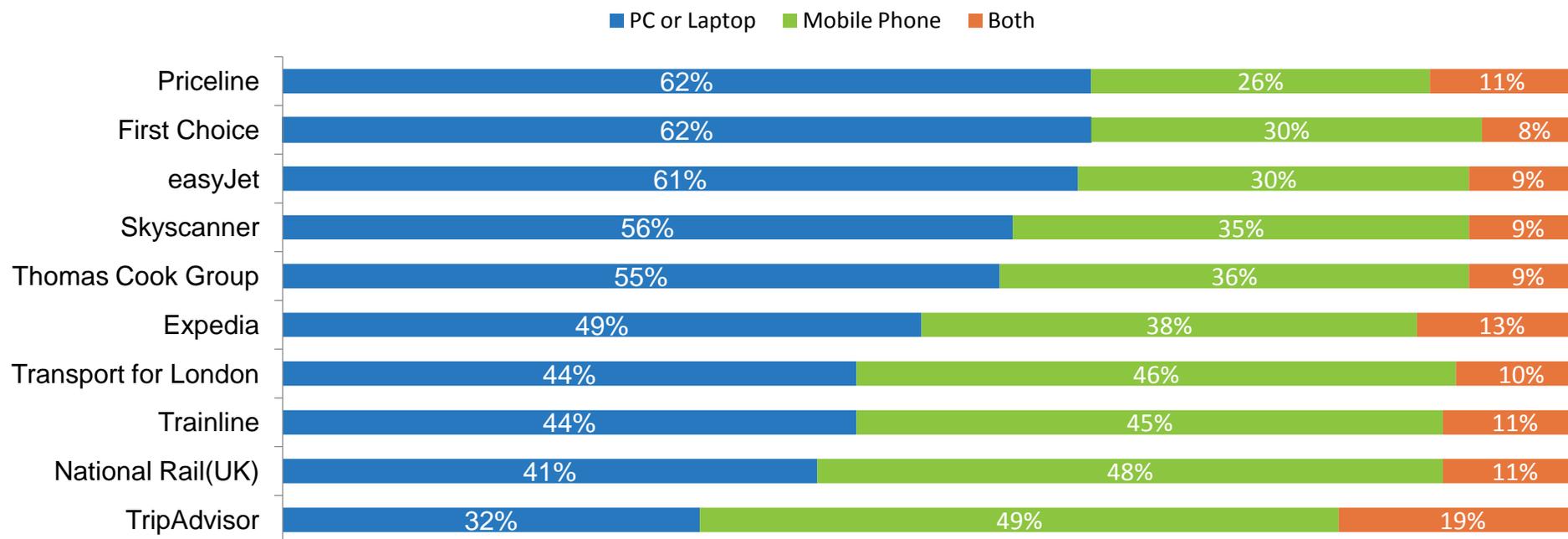


Source: ABTA, Travel Trends Report 2018

## Top 10 Travel Sites Visited by U.K. Tourists

Data shows that Priceline, First Choice, easyJet are the most visited travel websites for Britons. At the same time, it can be seen that Britons are used to using desktop devices to access the websites of online tour operators and airlines while using mobile phones to access travel review sites, travel real-time information and so on.

### Top 10 Travel Sites Visited by U.K. Tourists



Source: eMarketer

## The French Market



## Overview of French Outbound Tourists

- The minimum length of annual leave for the French is 5 weeks with an average of 7.5 weeks, ranking first in the world.
- Three quarters of the French travel at least once a year, and vacations are very important to the French.
- The proportion of French tourists took outbound travel had been increasing year by year.
- About 40% of French tourists choose to travel between July and August.
- Paris generated 30% of outbound travel. In addition, some large cities, such as Lyon and Marseille, also registered a large share of outbound tourists. Since Alsace is located on the German border, there were also many locals traveled to Germany.
- A large proportion of French outbound tourists were retirees.
- The average annual budget for French outbound tourists was 2,875 euros.
- The Internet remained the main information source of destinations for French outbound tourists, with 81% percent checking the Internet to get information. 33% of French outbound tourists consulted travel agents.

## Ways to Attract French Tourists

First of all, it is very important to understand the mindset of French tourists. They usually have specific needs and travel wishes:

- They like to travel independently way, i.e. not to join a travel group. They decide when and where to travel. Therefore, freedom is what they value the most in a trip.
- They don't like crowded places. They prefer to explore "New World" like an adventurer. They favor fresh views, but they feel uneasy when they are far away from home.

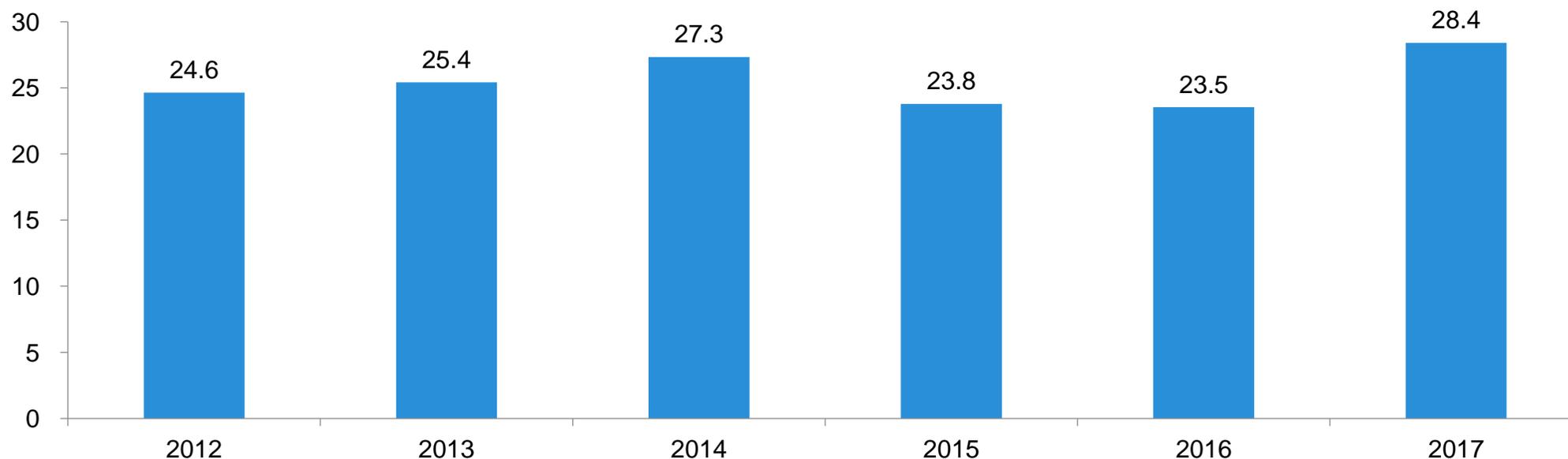
Secondly, a **mini-handbook** should be prepared for French tourists, which contains important local culture, address of scenic spots to visit, transportation, price information, hotel details, etc.

Lastly, a service office should be set up in the tour route for French tourists, which can provide them with suggestions, help and information to make them feel safe.

## The Number of French Outbound Tourists

Affected by the economic crisis, the number of French outbound tourists fell to 29.636 million in 2016 from the previous year. However, the French outbound travel market has stabilized in 2017 with 28.411 million outbound trips.

**Total Number of French Outbound Tourists 2012-2017 (million)**

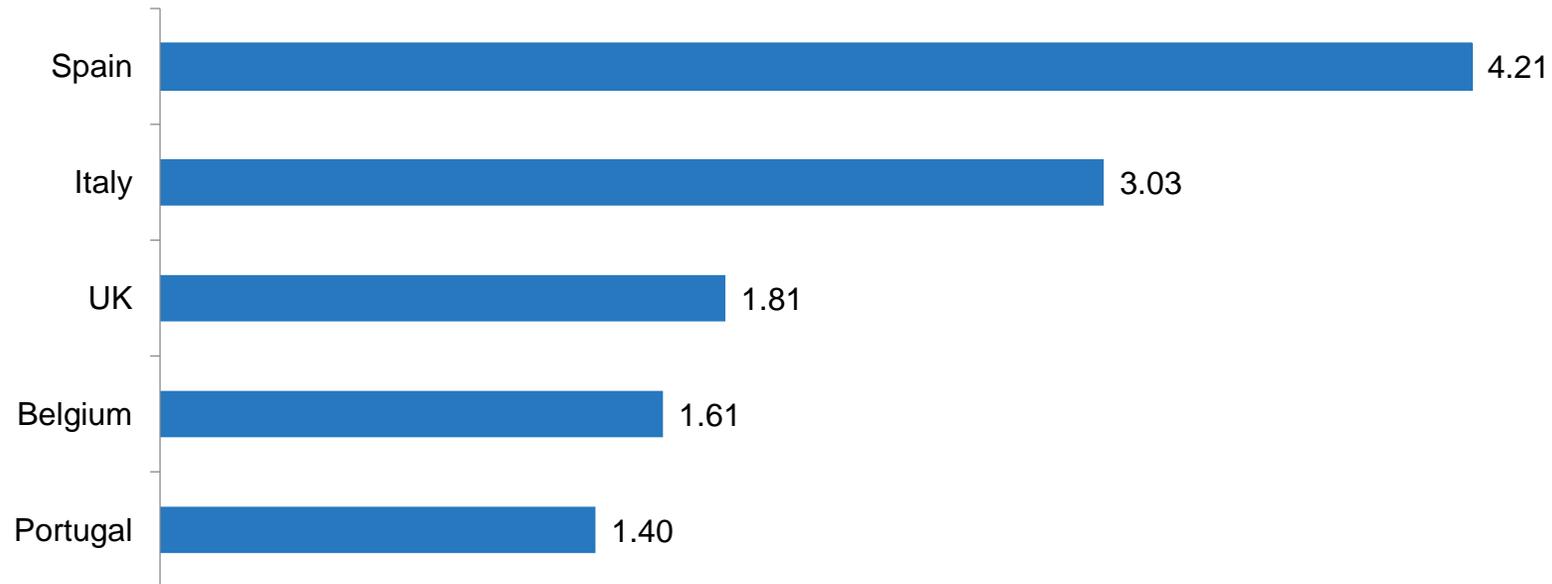


Source: Statista

## Top French Outbound Travel Destinations

Data shows that Europe remained the destination for French outbound tourists due to the advantage of geographical location. Destinations with sunny beach in Spain and Italy attracted French outbound tourists the most.

**TOP 5 French Outbound Travel Destinations in 2016 (million visits)**



# Long-Haul & Mid-Long-Haul Destinations for French Outbound Tourists

## Top 5 Long-Haul Destinations for French Outbound Tourists

Ranking	Destinations Countries	Number of Trips	Year-on-Year Growth
1	Dominican Republic	41,812	+8.7%
2	Mauritius	26,833	-4.6%
3	Cuba	24,441	+5.2%
4	Thailand	23,863	+15%
5	French West Indies	23,466	+89.4%

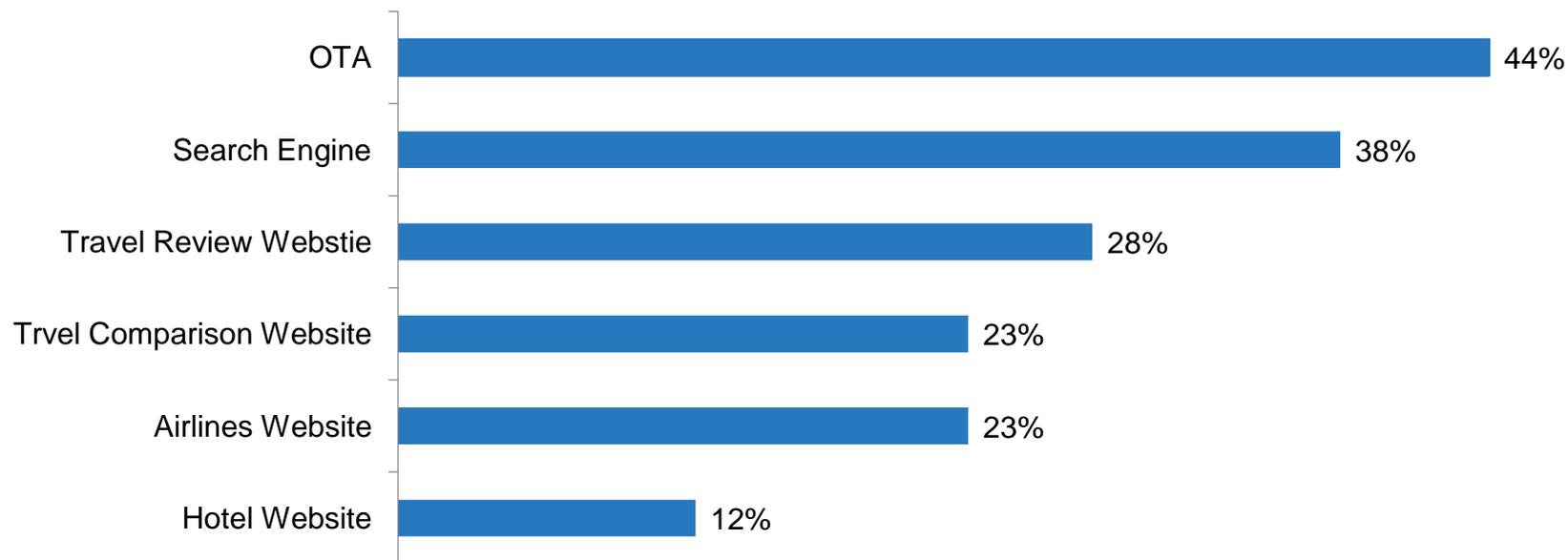
## Top 5 Mid-Long-Haul Destinations for French Outbound Tourists

Ranking	Destinations Countries	Number of Trips	Year-on-Year Growth
1	Canary Islands	86,444	+13.2%
2	Morocco	36,427	-1.9%
3	Italy	21,709	-17.03%
4	Spain	16,175	+22.7%
5	Portugal	10,233	+4.6 %

## Online Channels Selected by French Tourists When Booking Trips

Data shows that OTA websites were the most popular travel booking channel for French tourists, followed by search engines and travel review sites.

**Online Channels Selected by French Tourists When Booking Trips**



Source: Expedia Media Solutions, 2017

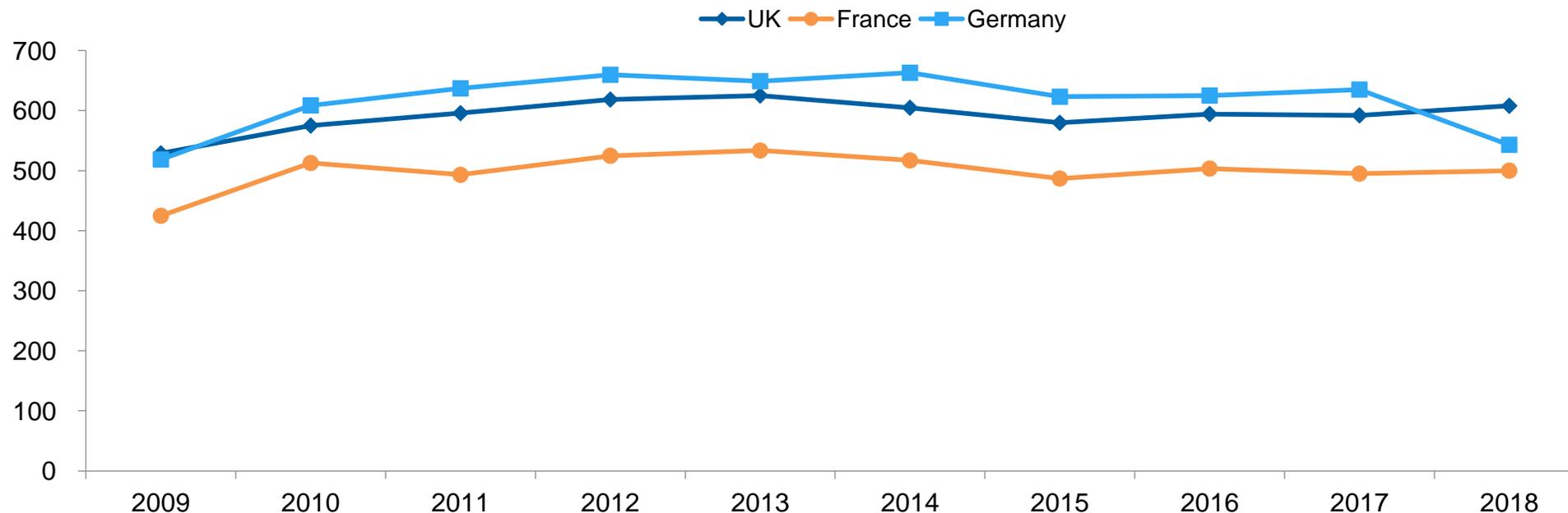


# China Tourism Market Overview on Europe Tourists to China/Hainan/Haikou (Primarily UK, France and Germany)

## Number of European Outbound Tourists to China

The number of European outbound tourists to China remained stable between 2009 and 2018. It is worth noting that the number of German outbound tourists coming to China dropped sharply in 2018, which was lower than the number of British tourists coming to China.

Number of European Outbound Tourists to China 2009-2018 (1,000 visits)

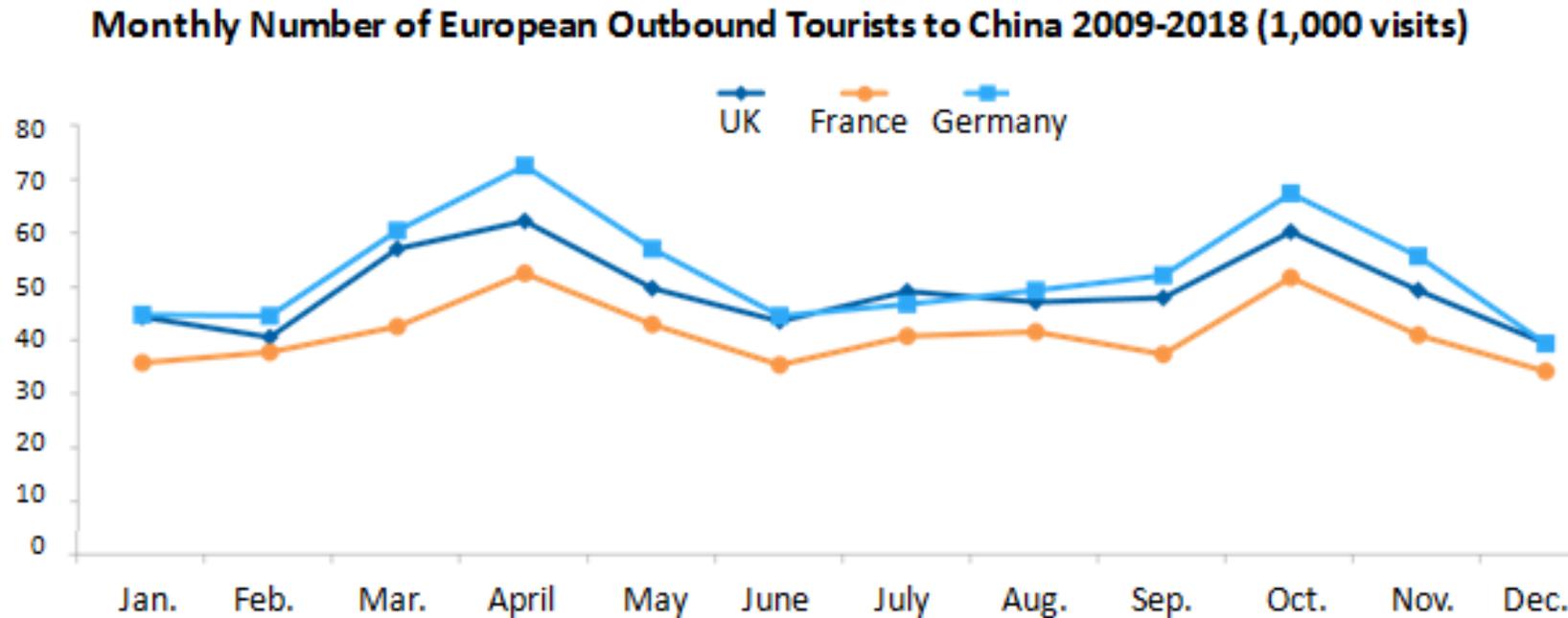


Source: National Bureau of Statistics of China

Note: Data on this page was collected from UK, French and Germany only

## The Monthly Number of European Outbound Tourists to China

The number of European Outbound Tourists to China fluctuated periodically between 2009 and 2018. The peak occurred in April and the second peak occurred in October each year.



## Destination Distribution of European Tourists into China

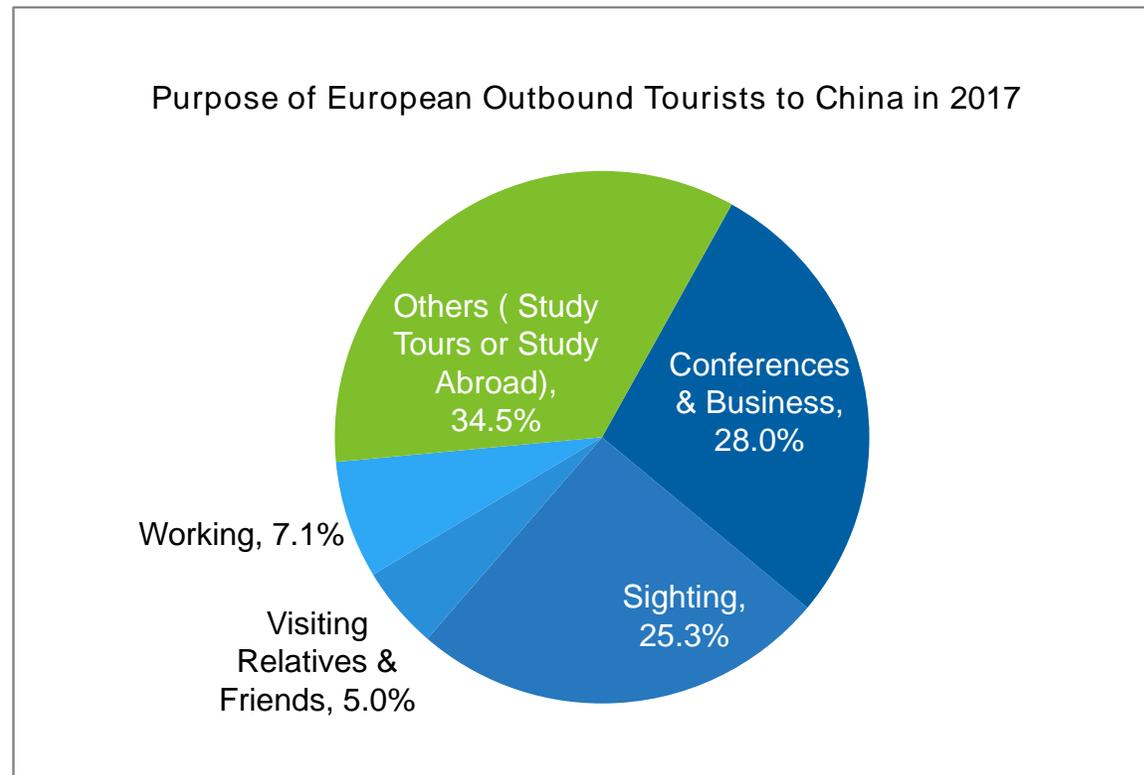
In 2017, the destination cities visited by overnight European tourists were mainly scattered in some first-tier cities and second-tier ones with rapid development, such as Shanghai and Beijing. It is worth noting that Wuhan attracted a lot of European tourists, although its economy is lag behind many developed cities. It's benefited from more than 100 French enterprises established in the city and more than 1,000 French nationals who have been working and living here for a long time. In addition, Wuhan has become the city where France invests the most in China. It's also one of the cities where French people live the most in China.

### Top Destination Cities of Overnight European Tourists in 2017 (Trips)

Destination Cities	Number of Inbound Trips from Europe
Shanghai	625,728
Beijing	481,089
Wuhan	327,309
Guangzhou	188,531
Luoyang	186,045
Hangzhou	110,523
Changchun	106,120
Suzhou	101,048
Xiamen	97,155
Ningbo	94,090

## Profiles of European Outbound Tourists to China: Purposes of Trip

In 2017, the largest proportion of European outbound tourists to China were for conferences and business, accounting for 28%, followed by those for sightseeing and leisure, accounting for 25.3%.



## Overnight Oversea Visitors to Hainan

In 2017, Russia was the biggest source of overnight overseas visitors to Hainan Province. The number of overnight overseas trips registered by the United Kingdom, France and Germany tourists were 9,749, 7,522 and 6,692 respectively.

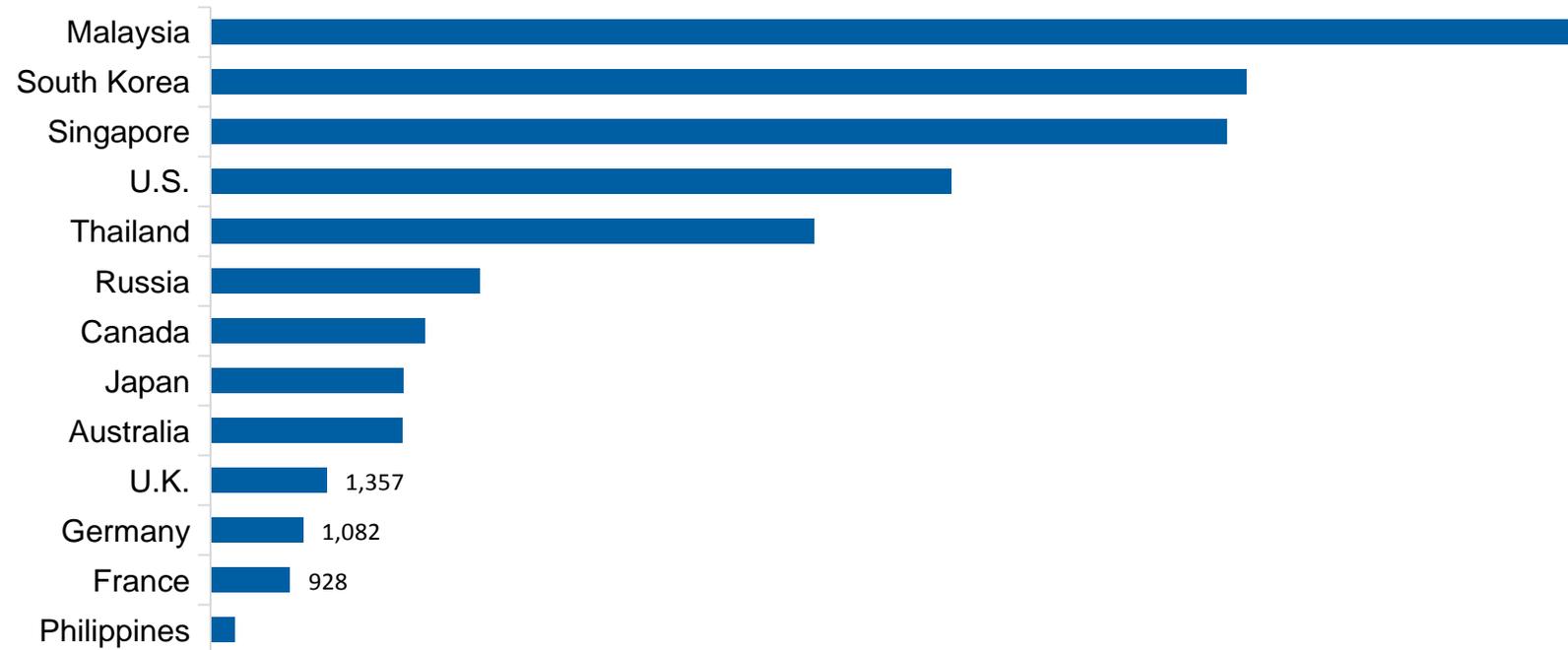
Overnight Oversea Visitors to Hainan by Country in 2017 (Trips)



## Overnight Oversea Visitors to HaiKou

In recent years, Haikou's inbound tourism has been boosted by visa exemption policy. The number of overnight overseas trips generated by the United Kingdom, France and Germany tourists were 1,357, 1,082 and 928 respectively, showing a vast development space in the future.

Overnight Oversea Visitors to Haikou by Country in 2017 (Trips)



Source: 2018年中国旅游统计年鉴



**THANK YOU**

