

Die “Reiseanalyse” (RA)

als Instrument der Marketingplanung

Martin Lohmann
Berlin, 14. März 2004

- Starke Kommunikation
- Vertriebskanäle, die wirklich zum Kunden führen und bezahlbar sind
- Intelligente Preisfindung
- Detailverliebte Produktinnovation

„Sniff Station“



Vancouver, Canada

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Dynamische Marktanalyse als Basis für die Kundenorientierung

Reiseanalyse: The Basics

The Reiseanalyse (RA) is a yearly (since 1970) representative survey of the holiday travel behaviour of the Germans, their travel related attitudes, motivations and interests.

The results are based on more than 7.500 face-to-face interviews carried out each year in January. The randomly selected sample is representative for the German-speaking population aged 14 years or older, living in private households in Germany.

Reiseanalyse: Organisation



Responsible body

F.U.R, Forschungsgemeinschaft
Urlaub und Reisen e.V.

F.U.R's objective

Realisation RA as an
independent project

Board

Anthony D. Cole (Vorsitzender),
Guido Wiegand (Studiosus),
Armin Vielhaber (StfT+E)

Executive

Dr. Peter Aderhold

Preparatory meetings

open to all partners interested

Conceptualization,
scientific advice +
customer relations,
F.U.R-office in Kiel



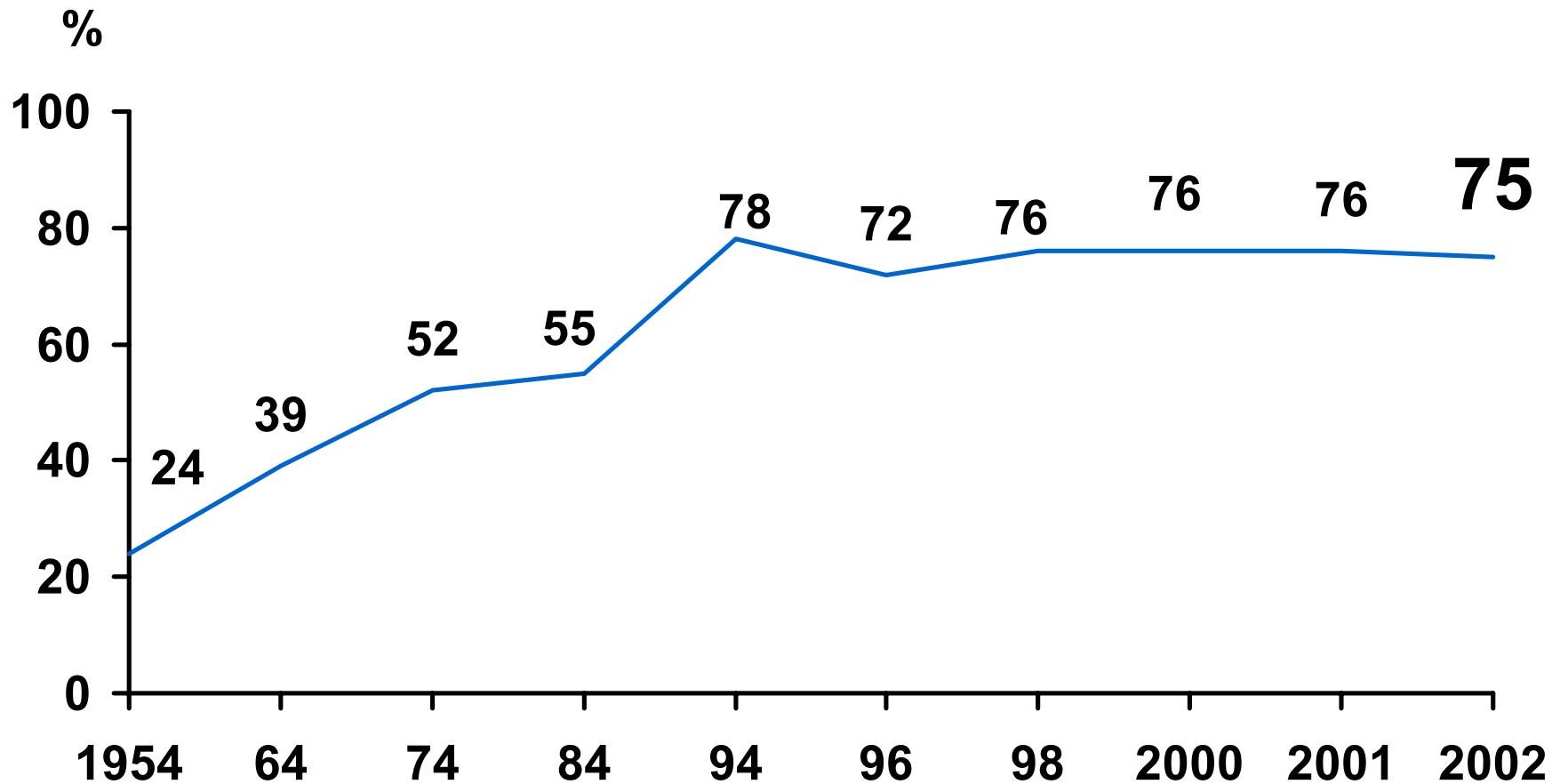
Prof. Dr. Martin Lohmann
Ulf Sonntag



Fieldwork RA
Data processing

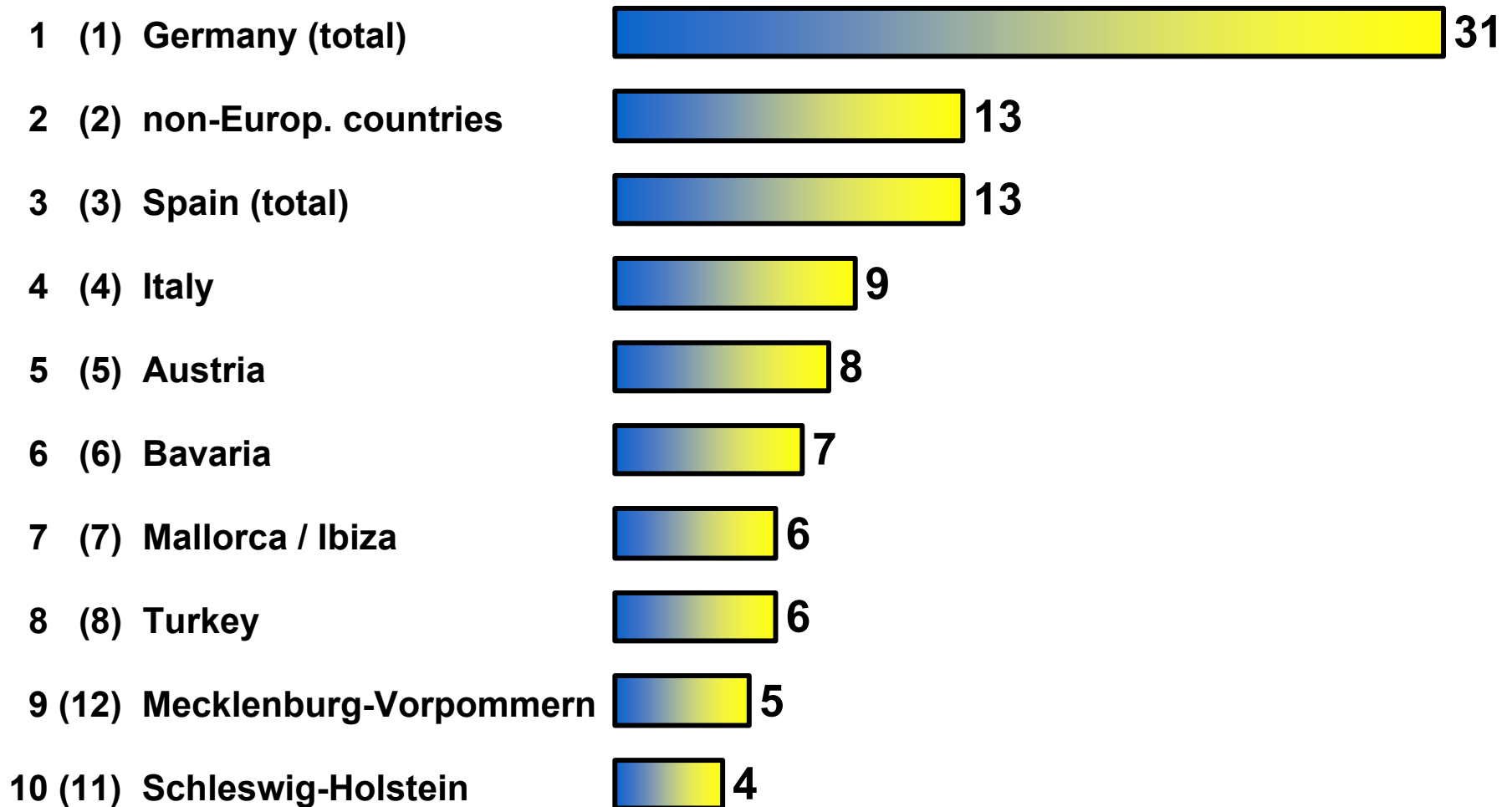
Uli Boës
Doni Boll

German Holiday Travel Propensity 1954 - 2002



Top-Destinations of 2002 Holidays

(rank in brackets = previous year's position)



% of holiday trips 2002

Sie kennen die Reiseanalyse?

„Das ist doch diese Untersuchung, von der es jedes Jahr auf der ITB diese Ergebnisse gibt, wie viele gereist sind und so.“

„Da gibt es auch was schriftlich, ein paar Seiten. Und man kann auch ein Buch kaufen, kostet aber ziemlich viel, so 100 € etwa. Da lade ich mir lieber die Daten aus dem Internet runter.“

Sie kennen die Reiseanalyse?

Solche Aussagen sind nicht falsch.

Aber eigentlich ist die RA eine Untersuchung, die im Auftrag für ihre Kunden gemacht wird:

Unternehmen, Verbände, Politik und Verwaltung, die alle kompetent und effizient auf dem Markt wirken wollen.

Für dieses kundenorientierte Marketing ist die RA in erster Linie angelegt.

Reiseanalyse: The partners (examples)

The RA is an independent multi-partner project with each year some 35 organisations as partners, both national and international.



Süddeutsche Zeitung
Deutschlands große Tageszeitung

Reiseanalyse: The partners (examples)



Reiseanalyse: The partners (examples)

SÜDTIROL

I T A L I A

Maison
de
la  **FRANCE**


Australian Tourist Commission


HUNGARY

schleswig-holstein*

Was wollen diese Partner wissen?

Typical problems / questions of Consumer Research

- **General market characteristics: structure, volumes, market shares?**
- **What is “my” position in the market?**
- **Who is buying my product?**
- **Why is someone buying my product?**
- **What attitudes are characteristic for the segment my product is aiming at?**
- **What do consumers associate with my brand and its competitors?**
- **What is the effect of my communicational efforts?**

Typical problems / questions of Consumer Research II

Future prospects, e.g.

- **General market trends**
- **Demand potentials**
- **Impacts of non-touristic aspects:
from strike to climate change,
from demographic structure to terrorism...**

Market research
as an empirical basis
for future marketing strategies
and product planning

Kundenorientiertes Marketing

Was braucht man für kundenorientiertes Marketing?



- **Verlässliche Daten über die
Nachfrageseite**
- **zu brauchbaren Themen**
- **und zu Konditionen, die eine
Nutzung möglich machen**

**Deswegen machen wir die RA.
Und deswegen machen wir sie so.**

Surveys: Whatever method you choose, you will always face the same two challenges:

- **What is the *universe* (the people I want to survey)? And how can I get a reliable *sample* of them?**
- **How do I formulate an appropriate *question*? (How to measure, to find the appropriate indicators for theoretical constructs?)**

Verlässliche Daten

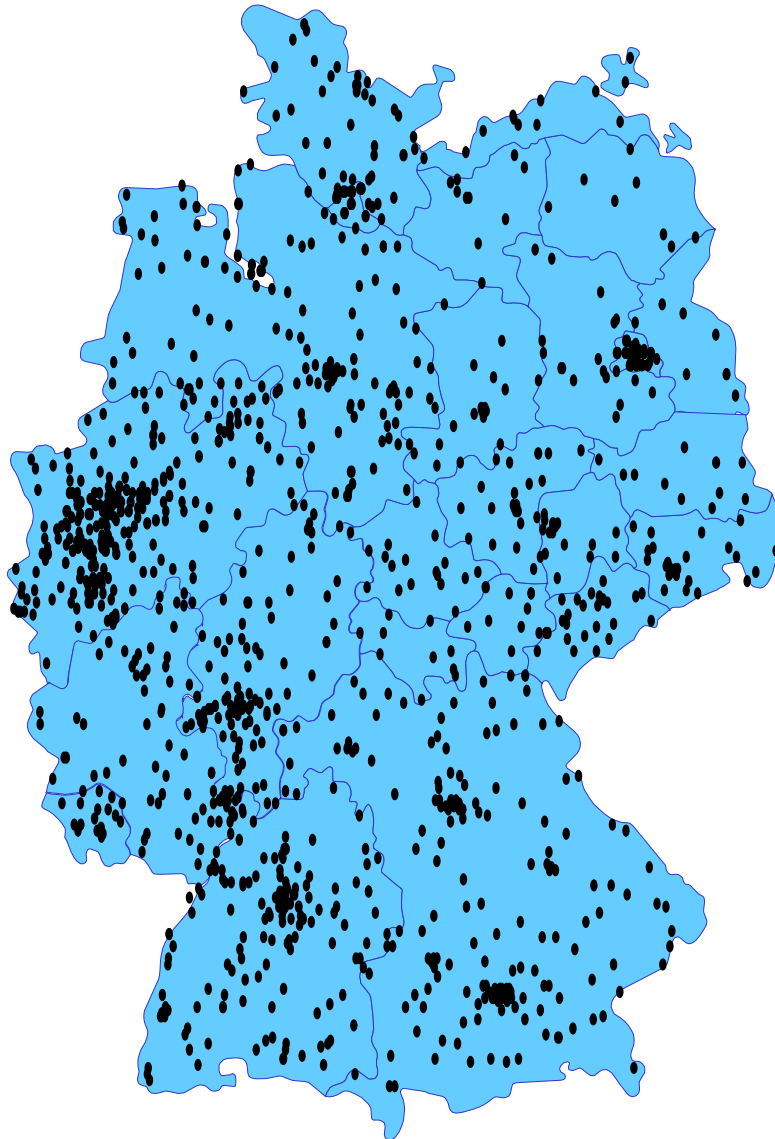
**...eine Frage der Methode:
objektiv + reliabel**

The RA is/has.....

- **a clear methodology**
 - scientific based; representative
 - time series of data, more than 30 years back

- **specialised in holiday travel**
 - long + short trips
 - in depth information on behaviour, attitudes, motivations, preferences, evaluations...

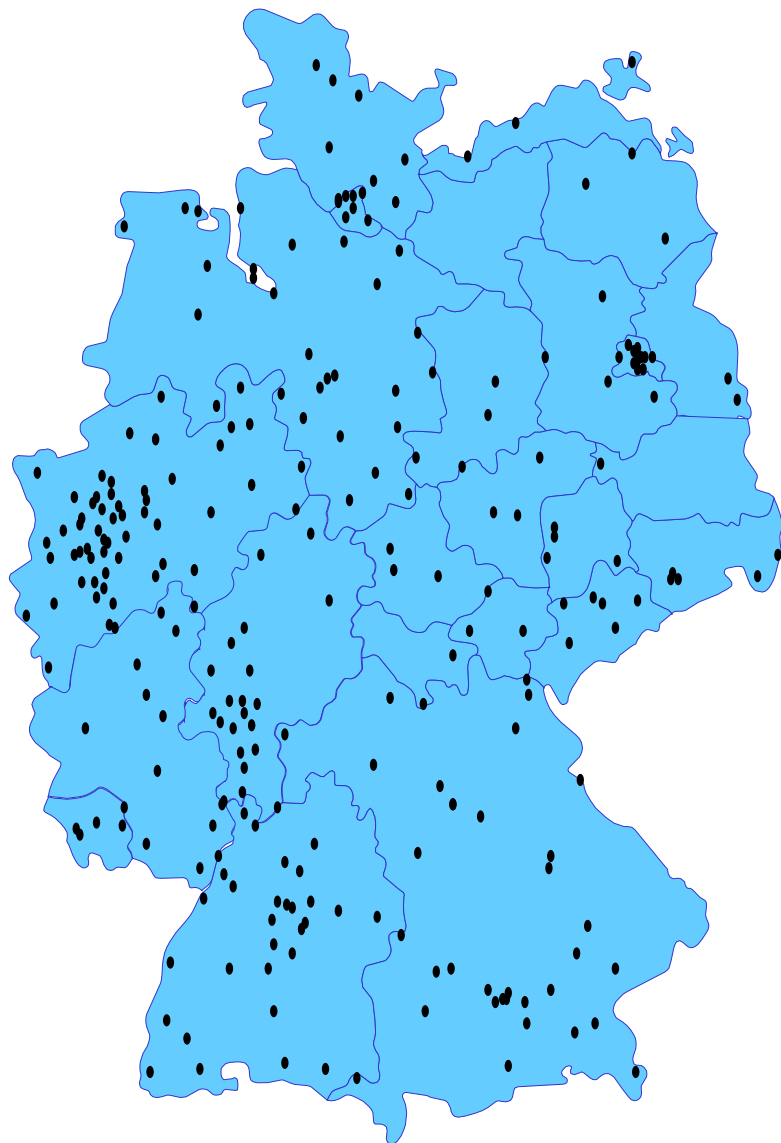
- ▶ **Consumer (person) in focus**
- ▶ **a sound and reliable base for customer orientation in tourism marketing**



Random sample

Every member of the universe has the same chance to be part of the sample.

Interviewees are exactly defined, thus the interviewer has no freedom to decide deliberately whom to ask or not to ask.



Standard-Sample for a population survey

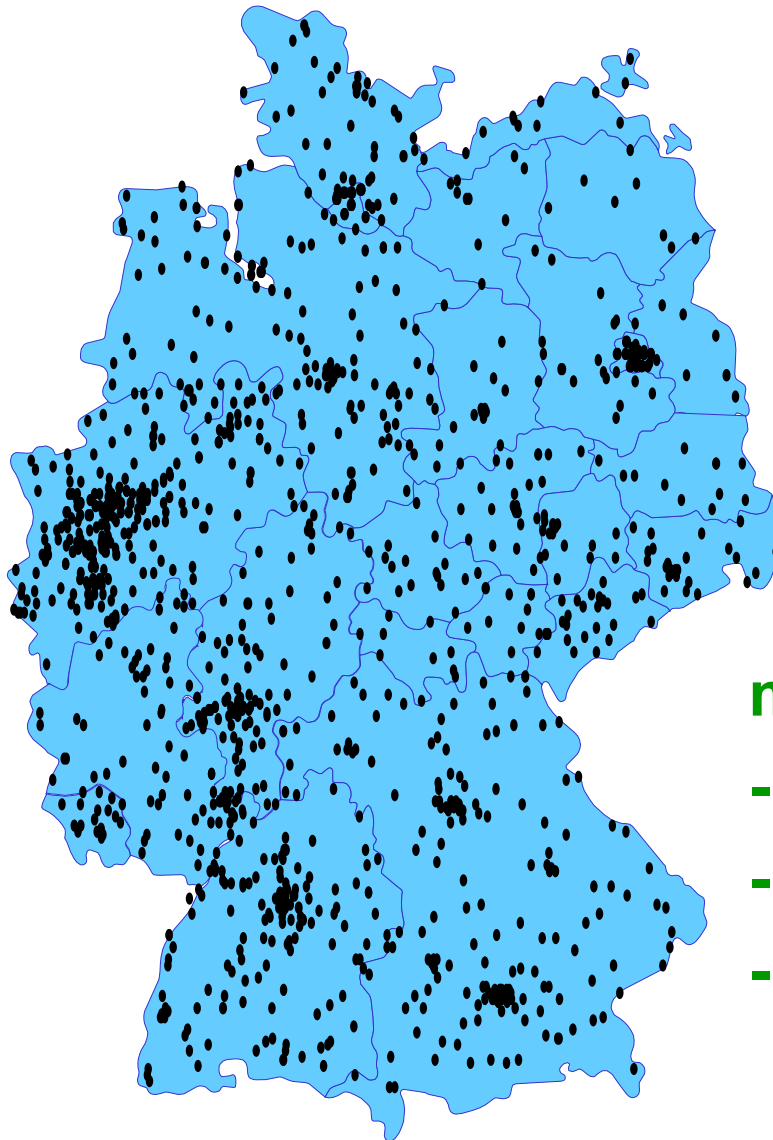
Sample-Points: 258

N of resp.: 1.000

Sample Reiseanalyse

Sample-Points: 1.500

N of resp. (app): 7.500



- multistage random sampling**
- **communities or voting districts**
 - **households**
 - **persons**

Reiseanalyse?

Why this way?

Das Vorgehen bei der Stichprobenziehung und der Durchführung der Interviews erlaubt:

- **hohe “response rate”**
- **Genauere Beschreibung der Ausfälle**
- **Hochrechnung der Daten auf die Grundgesamtheit**
- **Angabe statistischer Schwankungsbreiten**

Reiseanalyse?

Why this way?

- Objectivity in sampling
- Achieving a high reliability
 - “Personal” approach: we are interested in data on individuals and their travel & tourism behaviour not in data on tourism flows
 - Personal face-to-face interviews: best for long interviews; long lists; qualitative questions; when additional material is required; higher response rate
 - History: we stick to the method in order to have the possibility to compare with former years

We don't ignore that surveys and people (both interviewees and interviewers) have their limits...

Alternativen?

- Internet?
- Expertenurteile?
- Deduktives Vorgehen z.B. von “Megatrends” nach unten?

We don't ignore that surveys and people (both interviewees and interviewers) have their limits...

Brauchbare Themen

...eine Frage der Methode und
besonders des Fragebogens:
valide?

Standard-Program RA

last year's holiday trips (in detail)
destination preferences (domestic/abroad)
preferences for types of holidays
motivation
short breaks

Modules:

- Customer's satisfaction
- Consumer typology by price & quality
- Destination infra-structure

**Specific
exclusive
questions**

**Additional
topics**

RA 2004 Standard-Program

- **Holiday Motivation**
- **All Holiday Trips 2003** (destination, time, duration, accommodation, transport, expenditures, type of trip....)
- **Preferences for destinations abroad/domestic**
have been there / interest to go there
- **Preferences for types of holidays**
have done it / interest to do
- **Activities**
- **Shortbreaks**
- **Holiday travel intentions 2004**
- **Internet use, demographic data**

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Module erweitern das RA Programm

Module = themenbezogene Fragenpakete zur
Ergänzung des Standardprogramms der RA

Modulthemen in der RA 04:

- **Customer's satisfaction**
- **Consumer typology by price & quality**
- **Destination infra-structure**

Standard-Program RA

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exclusive
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Konditionen, die eine Nutzung möglich machen

...eine Frage der Kosten,
der Berichterstattung,
des Aufwandes und des Services

So werden die Daten geliefert:

Codebuch

- Überblick über die Ergebnisse aller Fragen in Fallzahlen, Mio. und %

Berichtsband

- Analyse der wichtigsten Untersuchungsergebnisse
- Textteil (mit Grafiken und Kurztabellen) + Basistabellen

Tabellenband

- sämtliche Ergebnisse der Standardfragen mit Auswertungen für die wichtigsten Zielgruppen (insgesamt 10 Tabellenköpfe)

Zählrecht

- Möglichkeit zu individuellen, „maßgeschneiderten“ Auswertungen

Außerdem möglich:

Eigener Datenträger

→ Für eigene kreative Analysen

Exklusive Studien

→ Spezifische Analyse

Vorträge

→ Aus den RA Daten

Daten für die Wissenschaft

→ Über das Zentralarchiv für empirische Sozialforschung an der Uni Köln

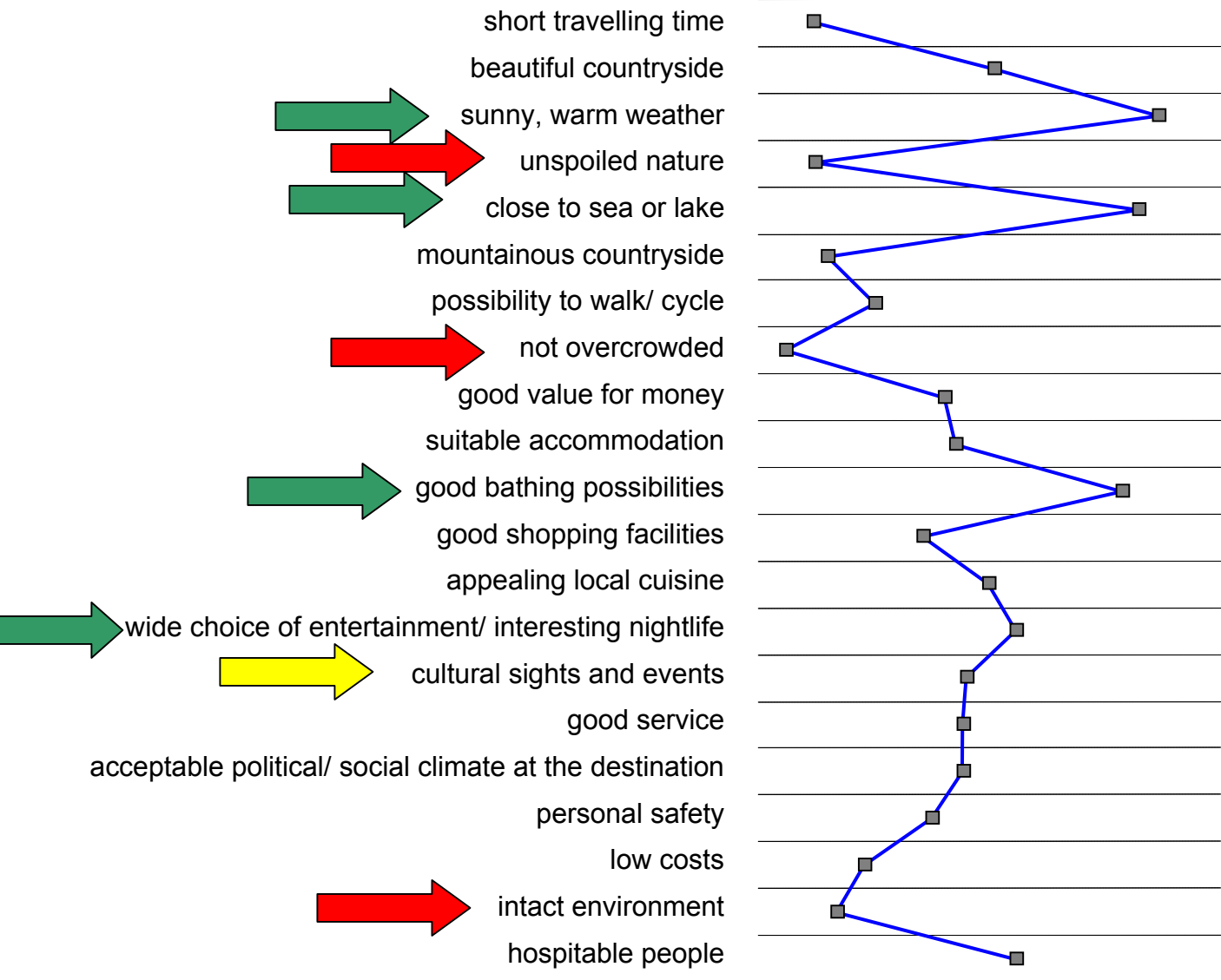
Ein Beispiel



Image of Spain

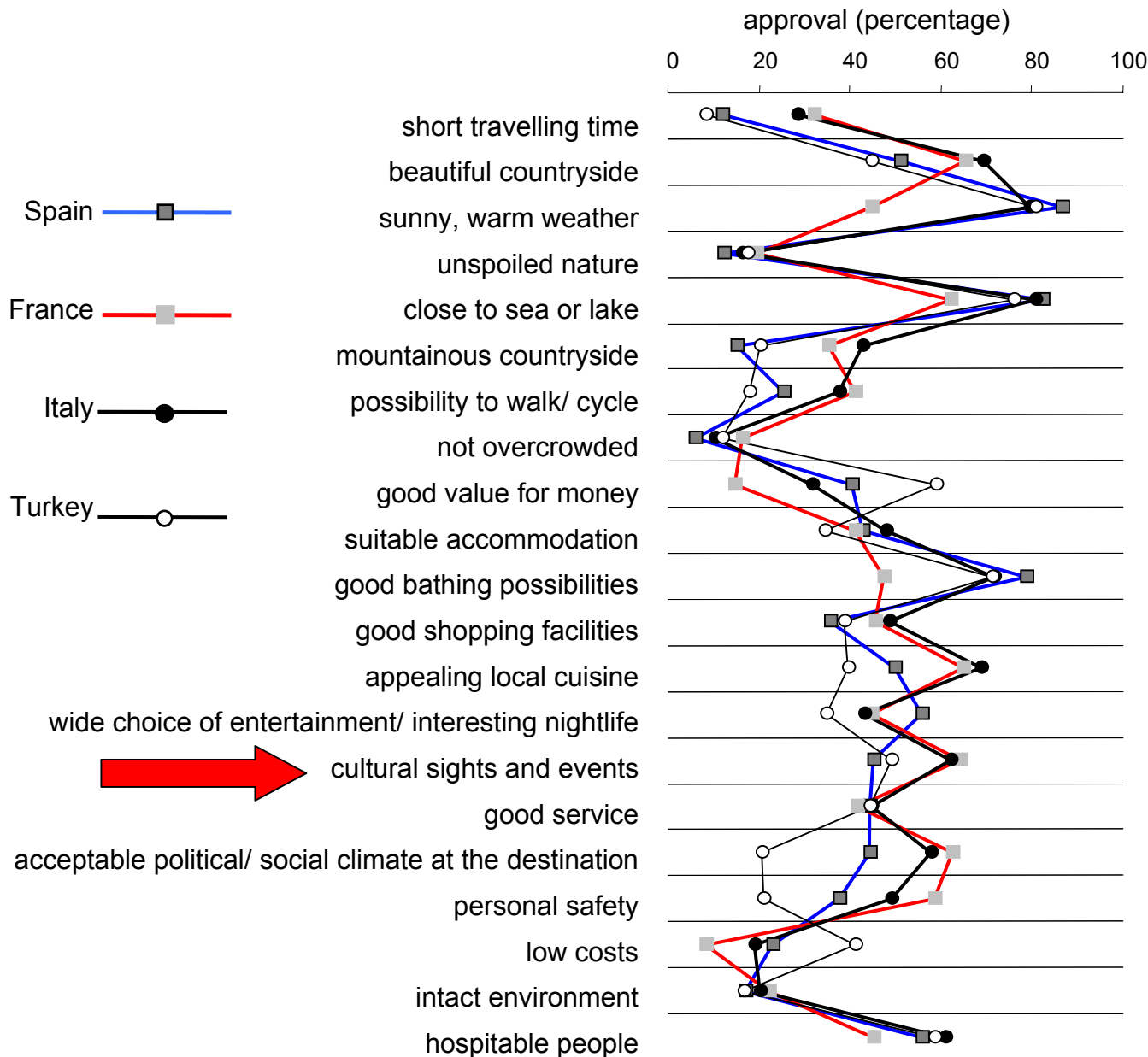


approval (percentage)



N.I.T., 2002;
source: RA 2002

Image of Spain and competitors



N.I.T., 2002;
source: RA 2002

- ☺ Spain has a well defined image: a typical **sun&beach** holiday destination with a wide choice of **entertainment** facilities and **hospitable** people.
- ☹ Very few Germans perceive Spain as **cheap**. “**Unspoiled nature**” and “**intact environment**” are not characteristic for Spain. Germans consider Spain to be a **crowded** destination.

Image of Spain in comparison



- ☺ Compared to its competitors, Spain is in a good position when it comes to **sun, fun & beach**.
- ☹ Spain has a comparatively bad position when it comes to **environmental aspects** and **culture**.
- ☺ Experienced Spain travellers have a better image when it comes to **culture, services** and **prices**.

Competitive position of Spain



Figures showing market share in % **HORIZONTAL**

Market segment

Volume in mn (=100%)

Germany

Spain

Italy

France

Turkey

Northern Africa

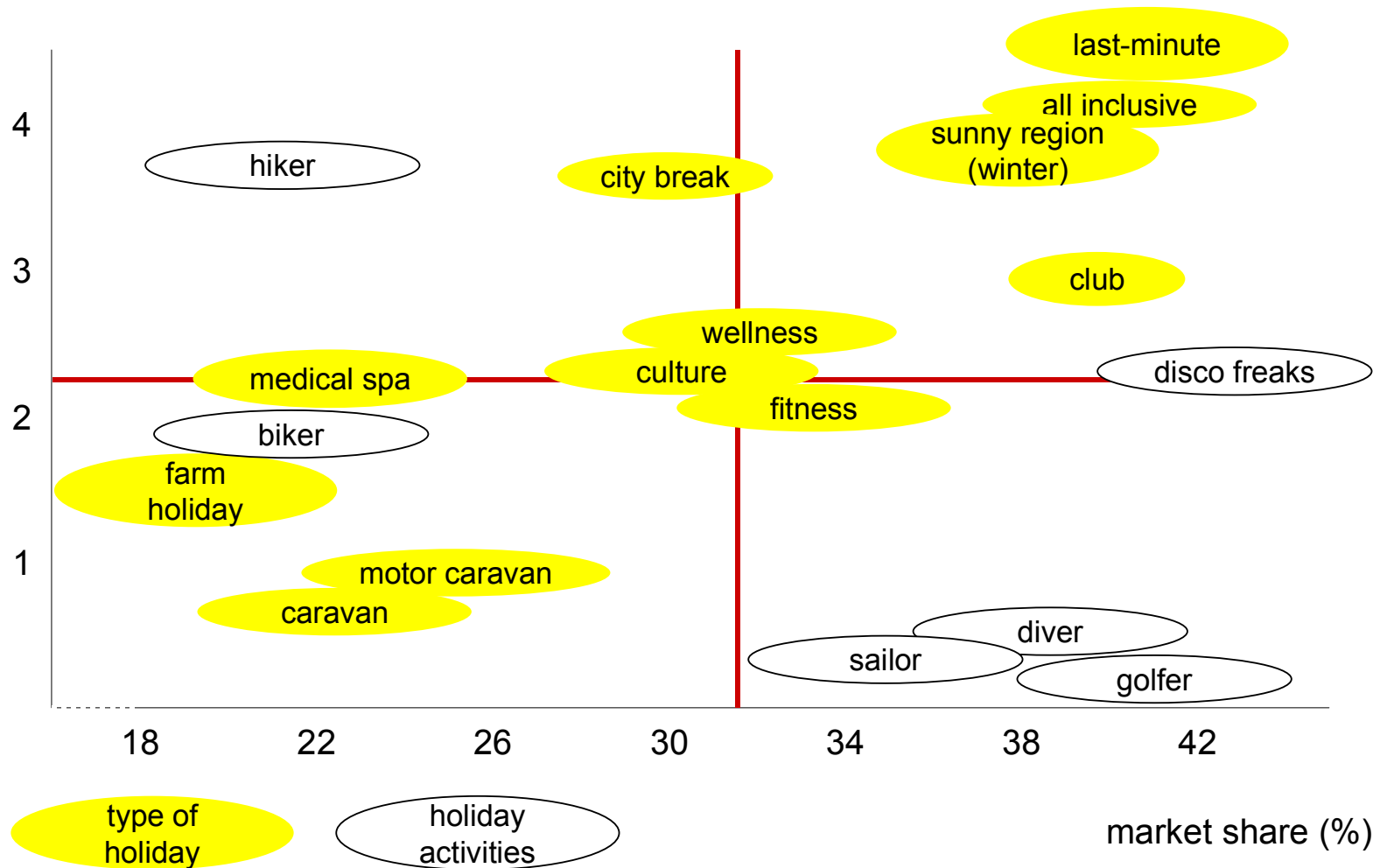
Long-haul

Market segment	Volume in mn (=100%)	Germany	Spain	Italy	France	Turkey	Northern Africa	Long-haul
All trips	63,41	29	14	9	4	5	3	6
Fun/party holiday	2.3	18	33	6	4	2	1	7
Beach/sunbathing holiday	12.8	11	31	9	3	10	5	6
Holiday to relax	11.6	33	17	10	3	6	3	2
Family holiday	6.9	35	8	11	5	5	2	2
Adventure / experience	4.4	22	8	9	5	5	3	17
Round trip	2.1	21	5	12	6	2	2	20
Cultural trip	1.4	25	5	19	10	5	6	8
Activity holiday	4.9	22	5	13	5	1	1	4
Nature holiday	4.5	50	4	8	4	1	0	2
Health holiday	2.1	55	4	7	0	0	2	0
Sightseeing holiday	1.7	23	4	9	9	4	4	16
Visiting relatives/friends	5.3	49	3	2	1	9	1	8
Study trip	0.9	29	3	9	13	4	3	14

Growth potentials



Growth potential (mn.)



3 arguments contra culture



- ☹ present market share is very small
- ☹ future interest is modest
- ☹ Spain has a low culture profile in Germany

These are (primarily) short-term obstacles!

3 arguments pro culture



- ☺ linking customer flows away from overcrowded regions
- ☺ improving the overall image of Spain
- ☺ attracting „high quality“ customers who spend more money

These could be long-term strategies!

Fazit

Die Reiseanalyse (RA) ermöglicht: **Monitoring the market / Analyzing the market**

- **segmentation** nach sozialen Gruppen, Reiseverhalten, Interessen, Motiven, Erfahrungen
- **Target groups**: identifizieren, beschreiben, analysieren
- Vorhersagen über **market trends**
- Analyse der Struktur **future customers** eines Urlaubsangebotes
- Analyse von **competition und change** zwischen Destinationen oder Urlaubsformen

Die RA bietet.....

With the help of the RA...

- Know your own **position in the market**
- Define your **competitors** with respect to the consumer's point of view
- Base for **consumer orientation** (e.g. by analyzing motives, desires, expectations)
- **Affinities of defined target groups**
(e.g. people doing club holidays or coach tours) towards destinations or types of holidays
- Evaluating marketing efforts by **long-time comparison**
- **“personalization” of the questionnaire** by adding your own exclusive questions

Die RA ist gut + nützlich.

**Schönen Dank
für Ihre Aufmerksamkeit!**

www.fur.de