



# WORLDWIDE TRAVEL TRENDS

LATEST INSIGHTS & OUTLOOK



# INTERNATIONAL TOURISM CONTINUES TO GROW

As in previous years international tourism continues to grow in 2019, though not quite as strongly as before. During the first eight months of this year outbound trips increased worldwide by 3.9 per cent, one percentage point below 2018. This year, Asia again recorded the highest growth in international travel, while Latin America saw a decline.

## OUTBOUND TRIPS BY ASIANS DRIVING GLOBAL GROWTH

At six per cent, Asia reported the world's highest growth during the first eight months of this year China, by far the continent's largest source market, contributed to this upward trend with an above-average growth of nine per cent. During the first eight months foreign trips by North Americans rose slightly above average, at 4.5 per cent. Foreign travel by Europeans increased too, although at 2.5 per cent they ranked well behind Asia and North America – and below 2018's figure. In contrast, during the first eight months foreign trips by Latin Americans reflected a negative trend with a year-on-year decline of three per cent.

## ASIA ALSO A POPULAR TRAVEL DESTINATION

Interest in Asia as a travel destination likewise shows an upward trend. With a six per cent increase in visitors during the first eight months, it recorded higher growth than any other region in the world. Trips to Europe are popular too, with a global visitor growth by 3.5 per cent, whereas trips to America only rose by two per cent.

## FURTHER INCREASE IN HOLIDAY TRIPS

During the first eight months of 2019, holiday trips increased globally by four per cent, while business travel stagnated. However, this reflects two divergent trends. "On the one hand we have the still-expanding MICE travel market, which during the first eight months grew by two per cent, and in contrast the traditional business travel, which shrank by four per cent over the same period", said Rolf Freitag, CEO of IPK International.

## CITY BREAKS ARE BOOMING AGAIN – INCREASE IN CRUISES

After moderate increases, city breaks came back with strong growth with eight per cent during the first eight months of 2019. With a global market share of close to 30 per cent now, city breaks rank only slightly behind sun and beach holidays, which recorded a two per cent rise during the first eight months. As well as round trips, which increased by three per cent, the cruise market expanded too. Compared with 2018 its growth by six per cent was above average.

## SAFETY IMAGE OF TRAVEL DESTINATIONS

Asked about the terror threat of individual destinations, the majority of global outbound travellers still rank destinations like Israel, Turkey, Egypt, Jordan and Tunisia as particularly unsafe. The possibility of terror in these countries is seen as very high. With regard to safety, the USA, Mexico, South Africa and France also have a poor image. In contrast, travel destinations like, Scandinavia, Switzerland, Austria, Ireland, Portugal as well as Australia and Canada are perceived as safe, where the terror threat is seen as low, according to the latest findings from September of this year.

## POSITIVE OUTLOOK FOR 2020

For the global outbound travel market IPK forecasts for 2020 a plus of four per cent. Outbound trips by Asians are expected to record the highest growth with five per cent. For the European outbound trips a growth rate of three to four per cent will be expected and for the Americans of three per cent.

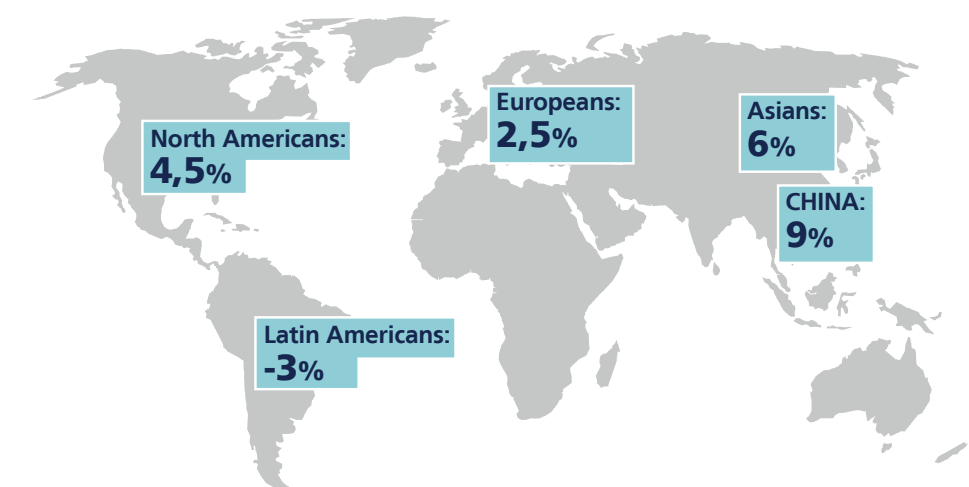
## IN SHORT

► Outbound trips increased worldwide by 3.9%

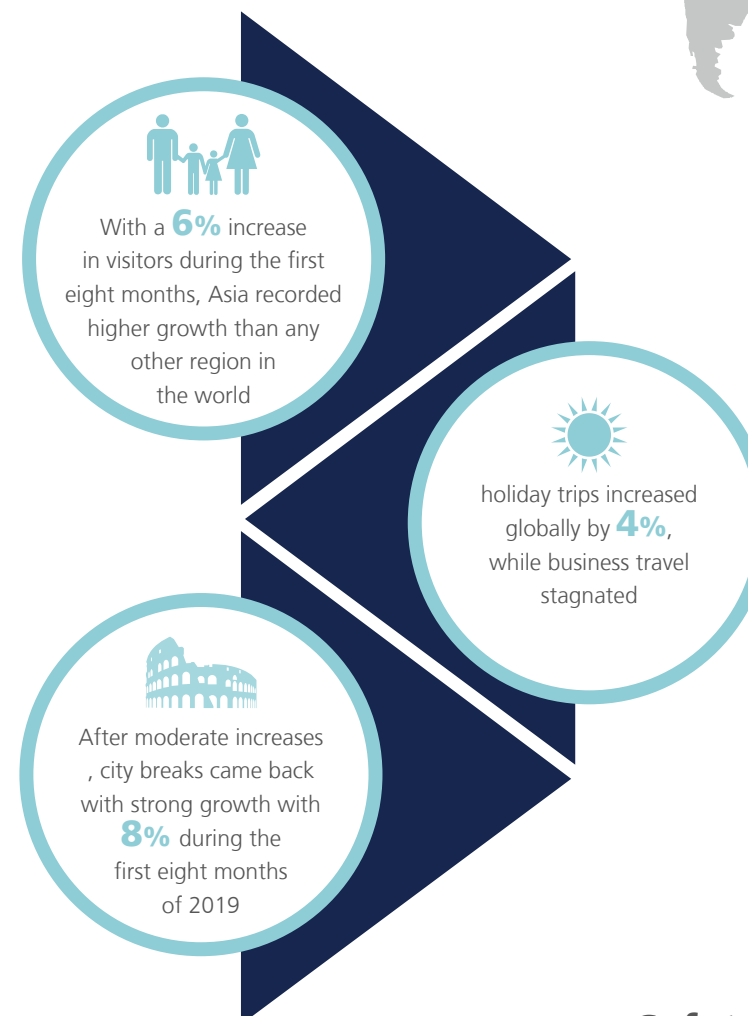
► Positive outlook for 2020

For the global outbound travel market 2020 IPK forecasts a plus of 4%

## Outbound trips by Asians driving global growth



## Asia: a popular travel destination



## OUTBOUND TRIPS

- At **6%**, Asia reported the world's highest growth
- China, by far the continent's largest source market, contributed to this upward trend with an above-average growth of **9%**.
- North Americans rose slightly above average, at **4.5%**.
- Foreign travel by Europeans increased too, although at **2.5%** they ranked well behind Asia and North America
- Latin Americans reflected a negative trend with a year-on-year decline of **3%**.

## Safety image of travel destinations

Countries considered safe, where the terror threat is seen as low.



## GROWTH IN OUTBOUND TRIPS FROM EUROPE

During the first eight months of 2019 outbound trips from Europe rose by 2.5 per cent, a weaker figure than 2018 and below the global average of 3.9 per cent. Outbound trips from Eastern Europe recorded a higher growth rate than those from Western Europe. At plus seven per cent, city breaks registered a strong increase again. The increase in trips to Germany by four per cent was higher than the European average.

### EUROPE'S SOURCE MARKETS REFLECT DIFFERENT TRENDS

Looking at Europe's individual source markets, noticeable is the above-average growth in Eastern European countries, which was much higher than in Western Europe. During the first eight months of 2019 outbound trips from Russia rose by seven per cent, from Poland by six per cent and from the Czech Republic by five per cent. By comparison, the growth rates of Western Europe's source markets were significantly lower. Outbound trips from Germany rose by two per cent, as did those from the Netherlands and Switzerland. At three per cent, the growth in outbound trips from Italy and France was somewhat higher.

### TRIPS TO EUROPE AND AMERICA MORE POPULAR THAN TO ASIA

With regards to destination choices, during the first eight months of 2019 trips to Europe performed better (plus three per cent) than trips to Asia (plus two per cent). Long-haul trips by Europeans to America, which in recent years had risen only slightly, were on the increase again (plus three per cent).

### SLIGHT GROWTH IN SPAIN – TRIPS TO THE UK ARE IN DECLINE

After stagnating in 2018, Spain, Europe's most popular holiday destination by far, achieved a slight growth again (one per cent). However, the outperforming destinations during the first eight months of the year were above all Turkey, Portugal and Greece. At four per cent, also Germany registered an above-average increase in visitors from Europe. By contrast, the UK again recorded a drop in visitors (minus five per cent).

### CITY BREAKS CONTINUE TO GROW

Overall, holiday trips increased by three per cent during the first eight months of 2019. At seven per cent, city breaks were the biggest growth driver in the holiday market, followed by countryside holidays and cruises, which both grew by five per cent. Sun and beach holidays, still the most popular holiday type, registered two per cent growth over the same period. Round trips, after increasing significantly 2018, rose by only one per cent last year.

### HIGHER GROWTH EXPECTED FOR 2020

IPK International forecasts that in 2020 outbound trips by Europeans will increase by three to four per cent, thus a higher growth rate than in 2019 will be expected.

## IN SHORT

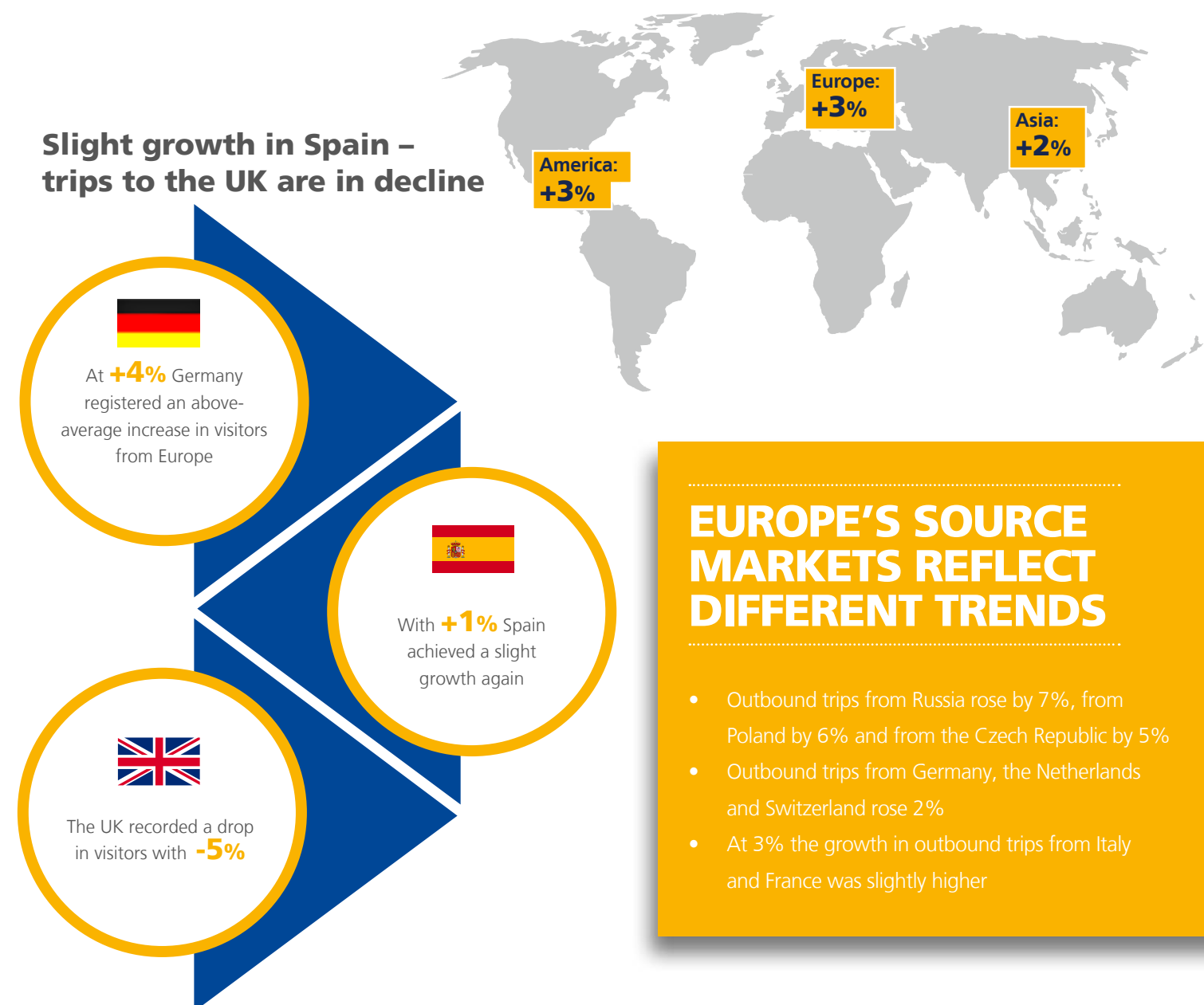
- ▶ Outbound trips from Europe rose by 2.5%
- ▶ A weaker figure than 2018 and below the global average of 3.9%
- ▶ At plus 7% city breaks registered a strong increase once again
- ▶ The increase in trips to Germany by 4% was higher than the European average
- ▶ Forecast: in 2020 outbound trips by Europeans will increase by 3 to 4%

### Destination choices:

#### Trips to Europe and America more popular than to Asia

- Trips to Europe (+3%) performed better than trips to Asia (+2%)
- Long-haul trips by Europeans to America were on the raise again (+3%)

### Slight growth in Spain – trips to the UK are in decline



## EUROPE'S SOURCE MARKETS REFLECT DIFFERENT TRENDS

- Outbound trips from Russia rose by 7%, from Poland by 6% and from the Czech Republic by 5%
- Outbound trips from Germany, the Netherlands and Switzerland rose 2%
- At 3% the growth in outbound trips from Italy and France was slightly higher



# INCREASE IN OUTBOUND TRIPS FROM GERMANY

Despite Germany's already high volume in outbound trips, the figures have grown by a further two per cent. Following a slump in recent years, trips from Germany to Turkey recorded double-digit growth. At eight per cent city breaks were the growth driver in the holiday travel market.

### GROWTH IN TRIPS FROM GERMANY

During the first eight months of 2019 outbound trips from Germany increased by two per cent, on a par with other western European source markets, but behind current growth rates in Eastern Europe. Germany's dominant position as a leading source market for outbound travel remains unchallenged. After the USA, it is the world's second largest outbound travel market and Europe's largest by far.

### TURKEY POPULAR AGAIN ON THE GERMANY MARKET

During the first eight months of 2019 the German market's most in-demand destinations were once again in Europe. Following a downturn in recent years Turkey regained its popularity on the German market. Thus, during the first eight months of the year trips to Turkey reported an above-average rise of 14 per cent, while trips to Spain grew by only two per cent. In contrast, visitor numbers from Germany to Greece and Croatia were in decline. At the same time, at five and four per cent respectively trips from Germany to the Netherlands and Poland reflected a noticeable increase.

### CITY BREAKS ARE BOOMING AGAIN

As in other European countries, outbound trips from Germany witnessed a renewed surge in city breaks, which at eight per cent recorded above-average growth during the first eight months of 2019. At three per cent, the number of sun and beach holidays increased too. In contrast, at minus four per cent round trips recorded a marked decline. Summer trips to the mountains and holidays in the country also attracted fewer outbound trips.

### INCREASE IN RAIL TRAVEL

With regards to the choice of transport, during the first eight months of 2019 more and more outbound trips from Germany were undertaken by rail, which grew by six per cent. At four per cent the increase in outbound flights was not as great although this figure rose too. The growth in rail and air travel came at the expense of car trips.

### POSITIVE OUTLOOK FOR 2020

IPK International forecasts outbound trips from Germany rising by two per cent in 2020, and thus a continuation of the market's positive upward trend.

## FIGURES:

- ▶ **Growth in trips from Germany**
  - **outbound trips from Germany increased by 2%**
  - **After the USA, Germany is the world's 2nd largest outbound travel market**
- ▶ **Turkey popular again on the Germany market**
  - **trips to Turkey reported an above-average rise of 14% while trips to Spain grew by only 2%**
  - **at 5% and 4% trips from Germany to the Netherlands and Poland reflected a noticeable increase**
- ▶ **Increase in rail travel**
  - **more and more outbound trips from Germany were undertaken by rail, which grew by 6%**
- ▶ **At 4%, the increase in outbound flights was not as great, although this figure rose too**

## CITY BREAKS ARE BOOMING AGAIN



Outbound trips from Germany witnessed a renewed surge in city breaks, which at **8%** recorded above-average growth



At **3%** the number of sun and beach holidays increased



At minus **4%** round trips recorded a decline

### Positive outlook for 2020

→ IPK International forecasts outbound trips from Germany rising by 2% in 2020

# CONTRASTING TRAVEL TRENDS ON THE AMERICAN CONTINENT

Two divergent travel trends marked the American continent in 2019. In the first eight months outbound travel from North America grew with 4.5 per cent higher than the global average, while at minus three per cent outbound trips from Latin America witnessed a relatively strong decline. Overall year-on-year figures reveal a 3.5 per cent increase in outbound travel from the Americas as a whole. Destinations in Europe were clearly more in demand than trips to Asia. City breaks are still displaying above-average growth.

### AMERICAN CONTINENT DISPLAYS TWO TRENDS

In the past the American continent benefited from Latin America's outbound travel boom. Initial results for 2019, however, display a completely different trend. While the North Americans' outbound trips increased at an above-average rate of 4.5 per cent, the Latin Americans' outbound trips virtually collapsed with minus three per cent.

In North America the driving force was outbound trips of US-Americans with a strong increase of six per cent compared to the previous year. In addition to some countries in South America, such as Argentina, the high-volume source market Mexico was the main reason for this negative development, with a five per cent decline in outbound travel.

### STRONG INCREASE IN TRIPS TO EUROPE

At seven per cent, travel to Europe is showing strongly above-average growth overall. Europe not only achieved the highest growth rate among North Americans, but was also up among Latin Americans. Trips to Spain and Italy were particularly in demand. These countries registered strong growth in visitor numbers, at 11 and 10 per cent respectively. Even the UK, which recently suffered a drop in visitors, was able to attract more visitors from America.

Compared to trips to Europe, outbound trips within the American continent, however, increased at a much lower rate of three per cent. Trips to Asia also only achieved three per cent growth.

### HOLIDAY TRIPS ON THE RISE

With regards to reasons for travelling abroad, holiday trips are becoming more popular on the American continent. Compared to the previous year the holiday segment grew by five per cent and now occupies just over 60 per cent of the market. In contrast business trips fell by one per cent.

### CITY BREAKS AS GROWTH DRIVER

A look at the various holiday types shows different trends. At ten per cent, city breaks once again reported above-average growth. Holidays in the country also recorded a strong growth, at nine per cent. At six per cent, the cruise market likewise witnessed a very positive development, followed by round trips, which increased by five per cent. In contrast, sun & beach holidays suffered a decline in popularity among Americans, falling by one per cent compared to the previous year period.

### POSITIVE OUTLOOK FOR 2020

IPK International expects outbound trips from North America to grow by three per cent in 2020, slightly less than in 2019. As far as outbound trips from Latin America, the market is expected to recover in 2020 by reaching one per cent growth.

## IN SHORT

- ▶ **Outbound travel from North America grew with 4.5% higher than the global average, while at minus 3% outbound trips from Latin America witnessed a relatively strong decline**
- ▶ **Overall year-on-year figures reveal a 3.5% increase in outbound travel from the Americas as a whole**
- ▶ **In North America the driving force was outbound trips of US-Americans with a strong increase of 6% compared to the previous year period**
- ▶ **In addition to some countries in South America, such as Argentina, the high-volume source market Mexico was the main reason for this negative development, with a 5% decline in outbound travel**
- ▶ **Strong increase in trips to Europe: At 7%, travel to Europe is showing strongly above-average growth overall**
- ▶ **Trips to Spain and Italy were particularly in demand. These countries registered strong growth in visitor numbers, at 11 and 10% respectively**



**Holiday trips** on the rise: Compared to the previous year period the holiday segment grew by 5% and now occupies over 60% of the market



In contrast **business trips** fell by one per cent



**City breaks** as growth driver: At 10%, city breaks once again reported above-average growth.



**Holidays in the country** also recorded a strong growth at 9%



At 6% the **cruise market** likewise witnessed a very positive development, followed by **round trips**, which increased by 5%



### Positive outlook for 2020

Outbound trips from North America to grow by **3%** in 2020, slightly less than in 2019. As far as outbound trips from Latin America, the market is expected to recover in 2020 by reaching 1% growth

# ASIA REMAINS THE LARGEST TOURISM GROWTH MARKET

Trips abroad from Asia are continuing to increase. After surging by seven per cent in 2018, during the first eight months of 2019 the number of trips rose by a further six per cent. This is in part due to international trips within Asia, which are a significant growth driver. Despite an anticipated decline in year-on-year growth, the prospects for 2020 remain good.

### GROWTH IN ASIA'S OUTBOUND TRAVEL MARKET EXCEEDS GLOBAL AVERAGE

Between January and August 2019 outbound travel from Asia rose by six per cent, once again making Asia the biggest growth driver in the international tourism market. "Growth in Asia's foreign travel market continues to exceed the global average, which during the first eight months of the year was only four per cent", said Julia Mühlberger, Marketing Consultant, IPK International, at ITB Asia 2019.

A closer look at the latest figures shows a further upward trend in trips to destinations within Asia. During the first eight months of 2019 and for the first time foreign trips within Asia accounted for nearly 80 per cent of the entire market. During the same period European countries registered a slight increase in travellers from Asia. At 15 per cent, they occupied a sound share of the market. In contrast, America's popularity with Asian travellers fell for the third year running. The country now accounts for only eight per cent of the market.

Per trip, Asian travellers spend considerably more than other nationalities despite shorter stays. Asians stayed for an average of 5.9 nights on outbound trips. This was a slight increase over 2018's figure (5.6 overnights). However, the figure was much lower than the global average (eight nights). Despite this, at 1,570 euros per trip spending by Asians abroad during the first eight months of 2019 significantly exceeded the global average (1,280 euros).

### CITY BREAKS ARE BOOMING. ROUND TRIPS HAVE RECOVERED SLIGHTLY

Among Asians city breaks remain by far the most popular form of outbound travel. They recorded the highest increase compared to previous years and between January and August 2019 grew by a further nine per cent, occupying 35 per cent of the market. Following a downturn in 2018, round trips recovered. Asia's second largest holiday market grew slightly by three per cent and accounted a market share of 24 per cent. Beach holidays continued the previous year's upward trend, rising by six per cent and occupying 21 per cent of the market.

### RISING MICE SEGMENT

Asia's growing economy has a positive impact on the business travel market. From January to August 2019, 17 per cent of Asians travelling abroad were on business / MICE trips, which compared to the previous year was an above-average increase of eight per cent. The MICE segment, with incentive travel and trips to trade fairs, was largely responsible for this growth, whereas traditional business trips were in decline.

### TRAVEL AGENCIES CONTINUE TO PLAY AN IMPORTANT ROLE

While Asians continue to rely heavily on the internet for information and bookings, nearly 50 per cent of Asian travellers still attach great importance to the personal advice offered by travel agencies. Furthermore, they make much greater use of this individual service than the global average. During the first eight months of 2019 85 per cent of Asian outbound travellers booked their trips on the internet, 40 per cent at travel agencies.

### SLOWER GROWTH EXPECTED IN 2020

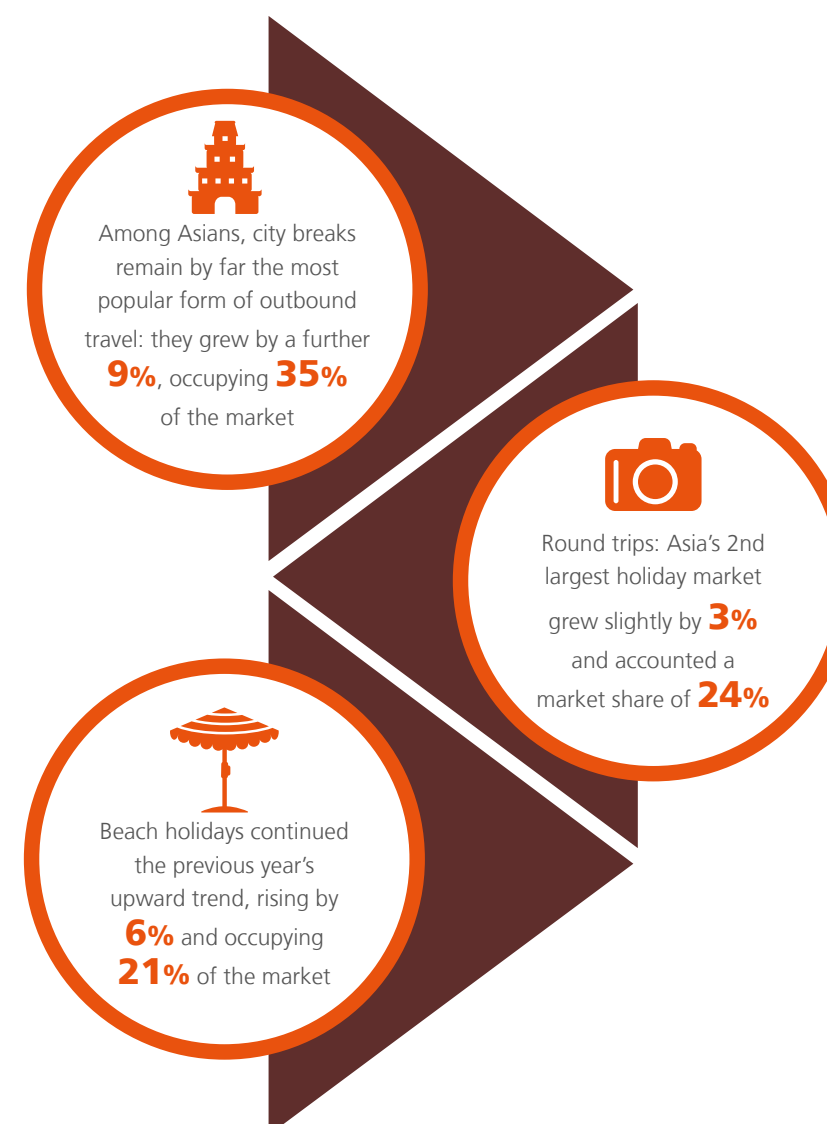
In 2020 outbound travels by Asians will grow by five per cent, outpacing the forecasted global trend. Against the backdrop of global economic developments, the experts anticipate slightly lower growth rates for next year.

## IN SHORT

### Growth in Asia's outbound travel market exceeds global average

- ▶ Trips abroad from Asia rose by 6%
- ▶ For the first time foreign trips within Asia accounted for nearly 80% of the market
- ▶ Asians stayed for an average of 5.9 nights on outbound trips
- ▶ With 1,570 euros per trip spending by Asians abroad significantly exceeded the global average (1,280 euros)

### City breaks are booming. Round trips have recovered slightly



### RISING MICE SEGMENT

- **17%** of Asians travelling abroad were on business / MICE trips which was an above-average increase of **8%**

### TRAVEL AGENCIES CONTINUE TO PLAY AN IMPORTANT ROLE

- Nearly **50%** of Asian travellers still attach great importance to the personal advice offered by travel agencies
- **85%** of Asian outbound travellers booked their trips on the internet, **40%** with a travel agency

### SLOWER GROWTH EXPECTED IN 2020

- In 2020 outbound travels by Asians will grow by **5%**

# STRONG UPWARD TREND IN INDIA'S OUTBOUND TRAVEL

The strong growth in outbound trips from India continued seamlessly again into 2019. In particular, destinations within Asia benefited from this upward trend. As in Asia overall, holidays abroad are becoming increasingly popular in India too. The latest findings point to further growth in outbound trips from India in 2020.

### ABOVE-AVERAGE GROWTH IN OUTBOUND TRIPS

Despite a large population and economic development India is not one of Asia's high-volume source markets for outbound trips. It ranks fifth, a long way behind China, South Korea, Japan and even Taiwan. However, in recent years India's market has recorded above-average growth in outbound travel: With an increase of seven per cent in the first eight months of 2019, outbound trips from India exceeded the average figure for Asia overall.

### DESTINATIONS WITHIN ASIA IN DEMAND

The main beneficiaries of India's growth in outbound travel are destinations in Asia, whose market share rose to almost 70 per cent in 2019. Destinations in Thailand, Indonesia, Malaysia and Japan were in particularly high demand and reported double-digit growth. At seven per cent, travel to North America increased significantly too, whereas trips to Europe were below average during the first eight months of 2019.

### HOLIDAYS ABROAD MORE AND MORE POPULAR

The Indian market's recent trend towards more frequent holidays abroad continued in 2019. Currently, holiday trips account for around 65 per cent of outbound trips from India. However, this figure is still well below par compared to Asia's average overall (around 80 per cent). City breaks and round trips are by far the most popular outbound holiday types among Indians and now represent a total market share of almost 65 per cent. Sun and beach holidays also benefited from the growth in outbound trips and represent 16 per cent of the holiday market. However, compared with other Asian source markets this figure is still below average.

### HIGH AFFINITY FOR TRAVEL AGENCIES

Indians travelling abroad made above-average use of travel agencies. With a market share of almost 45 per cent, travel agency bookings exceeded the Asian average as well as the global average, which is around 25 per cent.

### STRONG GROWTH AGAIN IN 2020

IPK International and ITB Berlin forecast a six per cent increase in outbound travel from India in 2020, thus continuing strong growth of the Indian market.

## IN SHORT

**With an increase of 7% in the first eight months of 2019, outbound trips from India exceeded the average figure for Asia overall**

The main beneficiaries of India's growth in outbound travel are destinations in Asia, whose market share rose to almost 70% in 2019

► **Destinations in Thailand, Indonesia, Malaysia and Japan were in particularly high demand and reported double-digit growth**

► **At 7% travel to North America increased significantly**



Holidays abroad more and more popular: Currently, holiday trips account for around **65%** of outbound trips from India

However, this figure is still well below par compared to Asia's average overall (around **80%**)



City breaks and round trips are by far the most popular outbound holiday types among Indians and now represent a total market share of almost **65%**



Sun and beach holidays also benefited from the growth in outbound trips and represent **16%** of the holiday market



High affinity for travel agencies: With a market share of almost **45%**, travel agency bookings exceeded the Asian average as well as the global average, which is around **25 %**



## ITB WORLD TRAVEL TRENDS 2020

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