

Budget holidays in the German travel market

Not just a question of money

Thomas Bausch

The term ‚budget‘ often appears in conjunction with travel and tourism. An analysis of the literature on it shows that there is no clear definition of the term and that it is used in widely different contexts. What all usages of the term ‚budget‘ have in common is the reference to low-cost travel. For the German market, this article shows

the funds available for trips and analyses expenditures during holiday trips. Based on the bottom quartiles of expenditures on holiday trips, holiday trips per person and holiday per day per person, a definition of budget holiday trips is given. A closer observation of this group, which without including visits to family or friends makes up 12.9 percent of all holiday trips, shows that it is by no means only

households from low-income groups who go on budget holidays. On the contrary, it is above all families and groups who choose destinations not too far away, in particular the North Sea and the Baltic while operators offering package tours with air travel to southern countries scarcely figure in this group, despite their large expenditure on advertising.

Table 1: Average monthly income Unit Size of household (households with people) and revenue as well as expenses of private households in Germany in 2014	Unit	Size of household (households with...people)				
		1	2	3	4 or more	total
Households (extrapolated)	million	15,3	12,8	4,3	4,2	36,6
Households (extrapolated in %)	%	41,8%	35,0%	11,7%	11,5%	100,0%
Household gross income	Euro	2.497	4.559	5.873	6.705	4.101
Household net income	Euro	1.913	3.544	4.406	5.113	3.147
Disposable income and earnings	Euro	1.955	3.605	4.497	5.215	3.208
Private consumption spending	Euro	1.519	2.692	3.151	3.720	2.375
Of which on leisure activities, entertainment and culture	Euro	157	285	319	392	248
Other expenses (in particular on acquisition of personal assets/real estate)	Euro	1.025	1.966	2.109	2.646	1.669

Source: Federal Statistical Office (2016), data on income, consumption, living conditions; basis for current sample surveys (LWRs), specialized series 15.

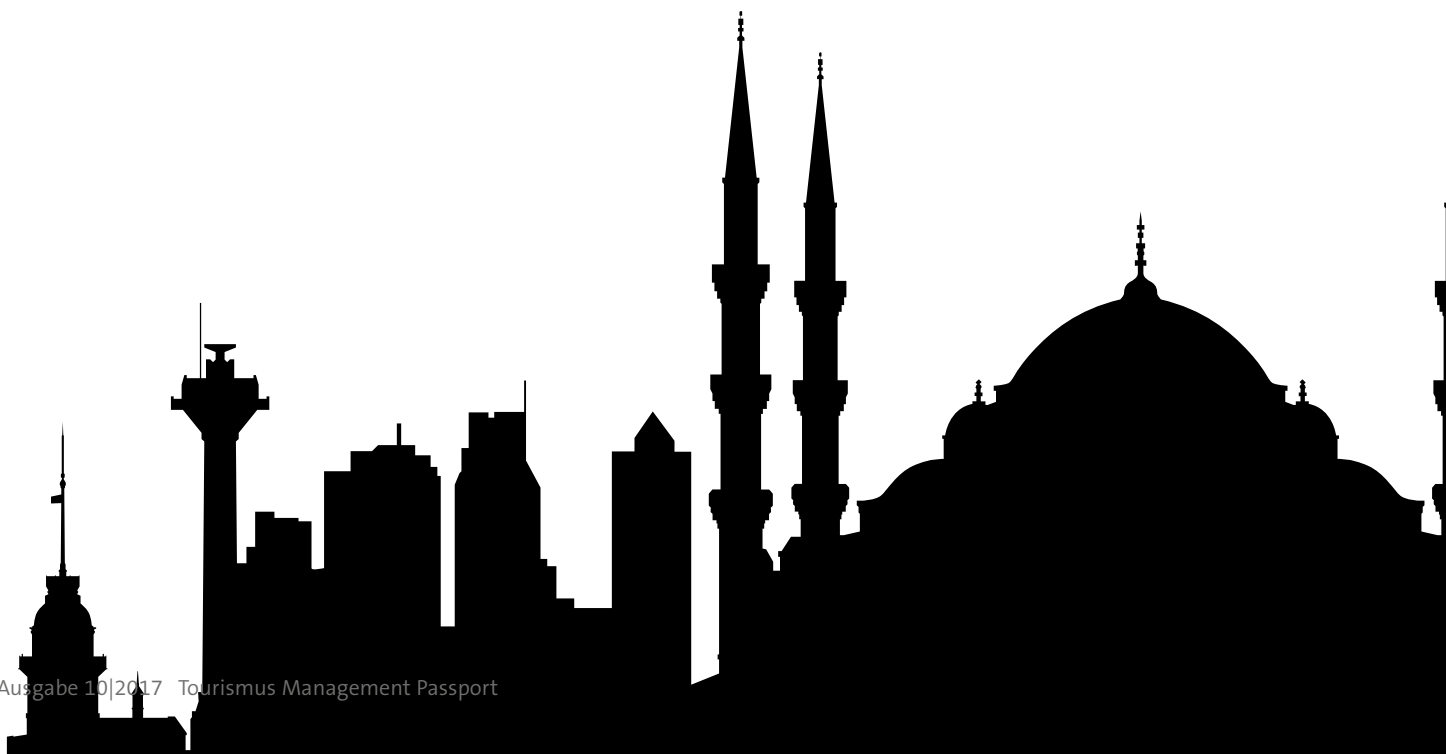


Table 2: Average monthly income and revenue as well as expenses of private households in Germany in 2014	Einheit	Household net income brackets					
		Less than 1.300 EUR	1.300 EUR to 1.700 EUR	1.700 EUR to 2.600 EUR	2.600 EUR to 3.600 EUR	3.600 EUR to 5.000 EUR	5.000 EUR to 18.000 EUR
Households (extrapolated)	million	6,7	3,6	7,6	6,8	6,0	6,0
Households (extrapolated in %)		18,2%	9,7%	20,8%	18,6%	16,4%	16,4%
Household gross income	Euro	1.063	1.793	2.661	3.902	5.589	9.392
Household net income	Euro	904	1.501	2.133	3.061	4.246	6.886
Disposable income and earnings	Euro	922	1.528	2.167	3.135	4.333	7.008
Private consumption spending	Euro	974	1.364	1.807	2.480	3.110	4.393
Of which on leisure activities, entertainment and culture	Euro	80	123	180	252	326	510
Other expenses (in particular on acquisition of personal assets/real estate)	Euro	321	425	812	1.415	2.470	4.470

Budget tourism in scientific literature

The term ‚budget traveller‘ first appeared in only a few publications, which deal with the travels, motivation and behaviour of ‚backpackers‘ (Cohen 1972, Riley 1988, Loker-Murphy and Pearce 1995, Elsrud 2001). They are less concerned with the economic than with the sociological aspects of the trips undertaken by this group. In the 1990s the perspective shifted from the demand side to the supply side. First, new business models in the hotel industry, in connection with budget hotels, were discussed (Roper and Carmouche 1989, Fiorentino 1995). As liberalization of the air traffic sector continued, the airline industry also became a subject for research, the first point of discussion being the impact on the market (Dresner et al. 1996; Barrett 1997). Later, a number of authors concerned themselves with marketing issues (Mason 2001) or customer

satisfaction. Further studies analyze the economic effects of low-cost flights (Rey et al. 2001).

Dwyer et al. (2000) consider the question of consumers' price sensitivity when choosing their destination. A deeper analysis of price models for package holidays in the German and UK tour operating industries is also discussed (P.M. Aguiló et al. 2001, E. Aguiló et al. 2003). Finally, a few authors consider the question of which forms of tourism are responsible for only very small added value in the destination regions. Akkemik (2012) shows the small overall economic contribution of low-cost package holidays to Turkey, while Larson et al. (2003), taking as an example cruise line passengers in Norway and their very low expenditures when they go on land, consider the question of whether cruise line passengers per se should also be classified as budget tourists.

Source: Federal Statistical Office (2016), data on income, consumption, living conditions; basis for current sample surveys (LWRs), specialized series 15.

In conclusion, it can be said that there is no clear definition of the terms ‚budget tourism‘ and ‚budget tourist‘. There is only a basic consensus that we are talking about travellers whose expenditures during a trip are below average and who therefore are very open to offers from so-called budget or low-cost tour operators. Moreover, it seems outdated and inadequate nowadays to equate budget tourists with backpackers.



Last-minute offers at the airport counter

Table 3: Travel expenditure in euro

	Spending on	Main holiday	2nd holiday	3rd holiday	4th + holiday
Bottom quartile	Trip	960	600	500	400
	Trip per person	500	375	300	250
	Trip per person and day	43	43	39	32
Median	Trip	1.500	1.000	826	700
	Trip per person	800	600	500	425
	Trip per person and day	67	70	63	54
Mean value (arithmetic mean)	Trip	1.945	1.332	1.092	891
	Trip per person	1.029	737	599	568
	Trip per person and day	81	83	75	76

Budget customers between the pleasure of saving and the need to save

Low-cost airlines, budget hotels, all-inclusive travel offers: in the travel industry an offer segment has developed with a sales strategy focusing primarily on low prices. The accompanying products are the result of business models based on low production costs through a high degree of standardization, and thus a low level of individual service. They thus follow the example of the discounters in the food industry and address customers for whom low prices are the main sales argument. In 2015, almost 70 percent of all Germans had shopped at least once at Aldi within a six-month period, and 57% at Lidl. Almost

half (48%) uses discount coupons or discount vouchers at least once a month (Statista 2016). Shopping around for special offers has become a habit for a good quarter of the Germans (27.6%). They always or mostly ("always applies", "applies") shop around for special offers before buying a product.

There are basically two reasons for this: one is the pleasure of saving money and getting a bargain, the other, however, is the need to do so because they have only very limited financial means. A good sixth of the German population (16.7%) are classified as in danger of falling into poverty (BMAS 2016). This means that this section of the population looks out for and is dependent on low-cost of-

fers. On the other hand, the large numbers of discounter customers and discount coupon users in the population show that the financially better-off classes of the population also like benefiting from favourable prices. The hybrid customers who move to and fro between saving and high-quality consumer goods are no exception, but rather the rule.

The money that many German households have left over to spend on holiday trips is very limited (cf. Table 1). Taking all households, the average monthly sum available for spending on leisure activities (including holiday trips), entertainment and culture is 248 euros, in one-person households the figure is only 157 euros.

If, moreover, we look at the distribution of income and the concomitant net household incomes (cf. Table 2) we see that more than one fifth of households (20.5%) have less than €1,300 net per month at their disposal. Such households spend an average of only €80 per month on leisure activities, entertainment and culture. More than half of all households have less than €2,600 monthly disposable income. Of this, considerably more than 40 percent goes on rent and energy. This leaves on average €131 for leisure activities, entertainment and culture, including holiday trips, for the entire household and its members. Only a small percentage of society (16.4%) have a net disposable income of more than €5,000 (on average, €6,886), of which they can spend more than 10 percent, or €510 on average, on leisure activities and holiday trips. This illustrates the fact that, for many people in Germany, being careful how much they spend on holidays is less a hobby than a necessity.

The analysis of disposable income also explains why economic reasons also result in certain sections of

Table 4: Time of Travel, Holiday Trips

Time of Travel	Budget travellers	Other holidaymakers
January-March	5,60%	8,30%
April-June	22,20%	30,30%
July-September	62,60%	48,50%
October-December	9,50%	13,00%

Table 5: Percentage of budget travellers per travel destination

Travel destination as per map	Budget travellers	Total market	Budget market
Harz region	40,5%	0,5%	1,5%
North-West Germany flat countryside/hilly	38,8%	0,9%	2,6%
Denmark	32,1%	1,4%	3,5%
Benelux countries	29,4%	2,3%	5,3%
Inland of the west coast and east coast	29,1%	1,7%	3,9%
Allgäu / Schwabia	27,8%	1,0%	2,2%
Franconia / Altmühltal	26,1%	0,9%	1,8%
Baltic Coast	24,9%	6,0%	11,7%
East Bavaria	22,6%	1,6%	2,8%
North Sea Coast	22,2%	4,3%	7,5%
East Germany – northern region without coast	20,9%	1,2%	1,9%
Large cities and their hinterland	20,2%	3,2%	5,0%
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Africa, bordering on the Mediterranean (excluding Egypt)	11,9%	0,9%	0,8%
Italy	8,5%	8,2%	5,4%
Turkey	5,2%	7,3%	2,9%
Spain with Mediterranean islands and Canary Islands	5,2%	13,1%	5,2%
Greece / Rhodes / Crete / Cyprus / Malta	4,0%	3,6%	1,1%
Domestic	23,0%	28,9%	51,6%
Abroad	8,8%	71,1%	48,4%
All holiday trips	12,9%	100,0%	100,0%

the population not going on trips. In the following, only holiday trips will be looked at. Holiday trips are all trips lasting five days or more. It will therefore be very difficult to increase the holiday intensity, meaning that percentage of the population who went on at least one holiday trip (in 2015 the figure was 77.0%), without a noticeable improvement in the income situation in the lower income groups. Nor is it surprising that a clear majority of those who go on at least one trip go on only one trip per year (76.8%), and of this group only a small section (30.1%) treat themselves to one or more short trips (2-4 days' duration) in addition to their main holiday trip.

Budget trips in the German holiday market

As part of the annual travel analysis (cf. www.fur.de) between 7,600 and 7,800 German speakers with their main residence in Germany are interviewed about the holiday trips they went on the previous calendar year. The 2016 travel analysis examined for example the destinations, organisation, length of stay, number and composition of the fellow travellers as well as expenditure on the holiday trips. Expenditures cover all the different service modules, meaning the total costs of the holiday trip: the journey out and journey back, the cost of services booked in advance as well as all additional spending at the holiday destination. This data allows a differentiated analysis of spending behaviour in the German holiday travel market. In the following, the term 'budget traveller' means holiday travellers in the still to be defined budget sector.

First of all a definition of budget holiday trips (BUR) should be created.

Table 6: Organization and execution of trip

Organization / journey out / accommodation	Budget-urlauber	Andere Urlauber
Package holidays, modular holidays	23,9%	54,1%
Individual ticket	8,8%	11,6%
Individual accommodation	43,6%	36,5%
Nothing booked in advance	24,2%	5,5%
Car	63,9%	36,2%
Car with caravan, mobile home, minibus	8,5%	3,2%
Airplane	13,5%	45,9%
Hotel	22,6%	59,2%
Holiday flat	25,7%	15,6%
Holiday house	13,2%	6,4%
Camping in tent, caravan, mobile home	17,3%	4,8%

To do so, three types of travel expenditures are considered: total expenditure on the holiday trip, expenditure per person and, finally, expenditure per person per day. Moreover, a distinction must be made between main holiday trips (HUR) and additional trips (only one trip = HUR 76.8%, 2nd trip 17.3%, 3rd trip 4.0%, 4th and more trips 1.7%). The different duration of these trips underlines the fact that additional consideration of the expenditures per person and day is re-

quired for definition purposes. The analysis shows that the average length of the main holiday trip is two weeks (13.6 days), of the second trip just under ten days (9.48 days), while the third and any further trips last slightly longer than a week (8.4, respectively 8.2 days). Table 3 shows an analysis of the distribution of travel expenditures. Whereas the table shows that under trip expenditure and trip expenditure per person the figures for lower quartile, median and mean value go down continuously, it also shows that the second holiday trip is the most expensive as regards expenditure per person and day.

To define budget holiday trips, in the following the bottom quartile will be taken. As the percentage of third

trips and further trips is very low, to simplify matters only the main holiday trip and the second trip will be considered. The following rule applies:

A main holiday trip is considered a budget trip if the total costs are a maximum of 960 euros or the costs per person a maximum of 500 euros, and the costs per person and day on no account exceed 43 euros.

A further holiday is considered a budget trip if the total costs are a maximum of 600 euros or the costs per person a maximum of 375 euros, and the costs per person and day on no account exceed 43 euros.

Using the quartile as criterion for the costs per person and day excludes short trips by individual travellers which at the same time show an above-average daily budget. In the case of a five-day main holiday trip by an individual traveller with travel expenditure of 500 euros, travel expenditure per person is also 500 euros and thus both values are within the bottom quartile. At 100 euros, expenditure per person and day is however in the top quartile.

Under these rules, 19.9 percent or 13.8 million of all holiday trips are classified as budget trips. For the main holiday trip and the second trip, the percentage is almost average, whereas it rises to a quarter for the third trip and, for all further trips, to a third. An initial analysis of the thus defined BURs according to types of holiday shows, not surprisingly, that of these noticeably more than one quarter were primarily visits to friends and relations. These holiday trips will no longer be considered in

Table 7: Percentages of budget travellers going on classical package tours with flight

Destination	Percentage on package & hotel & flight	Of which, budget travellers
Spain with Mediterranean islands and the Canary Islands	69,5%	5,2%
Turkey	69,0%	5,2%
Greece / Rhodes / Crete / Malta / Cyprus	72,6%	4,0%
Near and Middle East (including Egypt)	72,3%	3,4%
Italy	9,6%	8,5%
Portugal / Madeira / the Azores	56,3%	4,9%
North Africa, Mediterranean (excluding Egypt)	67,2%	11,9%

the further analysis as they are organized outside of the competitive and the holiday travel market. Moreover, a large number of such trips are holiday trips by people with a migration background. Countries such as Portugal, Turkey or Greece are heavily over-represented compared to the overall market. This therefore leaves a figure of 8.9 million BURs in the travel market, which corresponds to 12.9 percent. A deeper analysis of this percentage is given below.

Sociodemographic structure of the budget travellers

Budget travellers are on average noticeably younger (63.7% are under 50) than the less price-conscious group of non-budget travellers (50.1% under 50). A noticeable higher percentage

are still at school or in job training (budget travellers 15.3%, non-budget travellers 10.2%). The number of [blue-collar] workers is considerably higher (budget travellers 17.1%) compared to non-budget travellers (13.3%). Moreover, the percentage of households with three or more members is almost twice as high (budget travellers 62.3%, non-budget travellers 36.8%). Accordingly, there are considerably more households with children (budget travellers 47.8%, non-budget travellers 24%). Net household income is on average lower, although almost 60% of the budget travellers do have a disposable income of between 2,000 and 4,000 euros. The higher number of people living in the household relativizes this apparently good financial situation. The Sinus Milieus classification (see Sinus Markt- und Sozialforschung GmbH

(Sinus 2015)) shows slightly higher percentages of budget travellers from the socioecological milieu, the bourgeois milieu and the hedonistic milieu. They are noticeably under-represented in the established conservative milieu, the liberal intellectual milieu and in the performer milieu.

Travel behaviour of the budget travellers

The travel behaviour can be divided into three types of behaviour: the choice of travel time and destination, the organization and execution of the trip and the number of fellow travellers.

Travel times and travel destinations

Almost two thirds of budget travellers go on holiday in the peak season between July and September (see Table 4). They travel at a time of year when, due to the high demand, travel prices everywhere and for all types of trips are exceptionally high. They are therefore particularly dependent on low-priced travel destinations and trip types. The figures do not bear out the assumption that budget travellers travel more in the off-peak season in order to make excessive use of special offers. As almost half of all budget travellers are children under the age of 18, it is also clear that for this group the main holiday trip must take place during the school holidays. As a result, in fact 72.5 percent of the main holiday trips (HUR) of all budget holiday trips are undertaken in the summer months of July to September. If a budget holiday trip is a 2nd, 3rd or 4th trip, it is undertaken in the other seasons, the winter season (January to March, and December) being the least

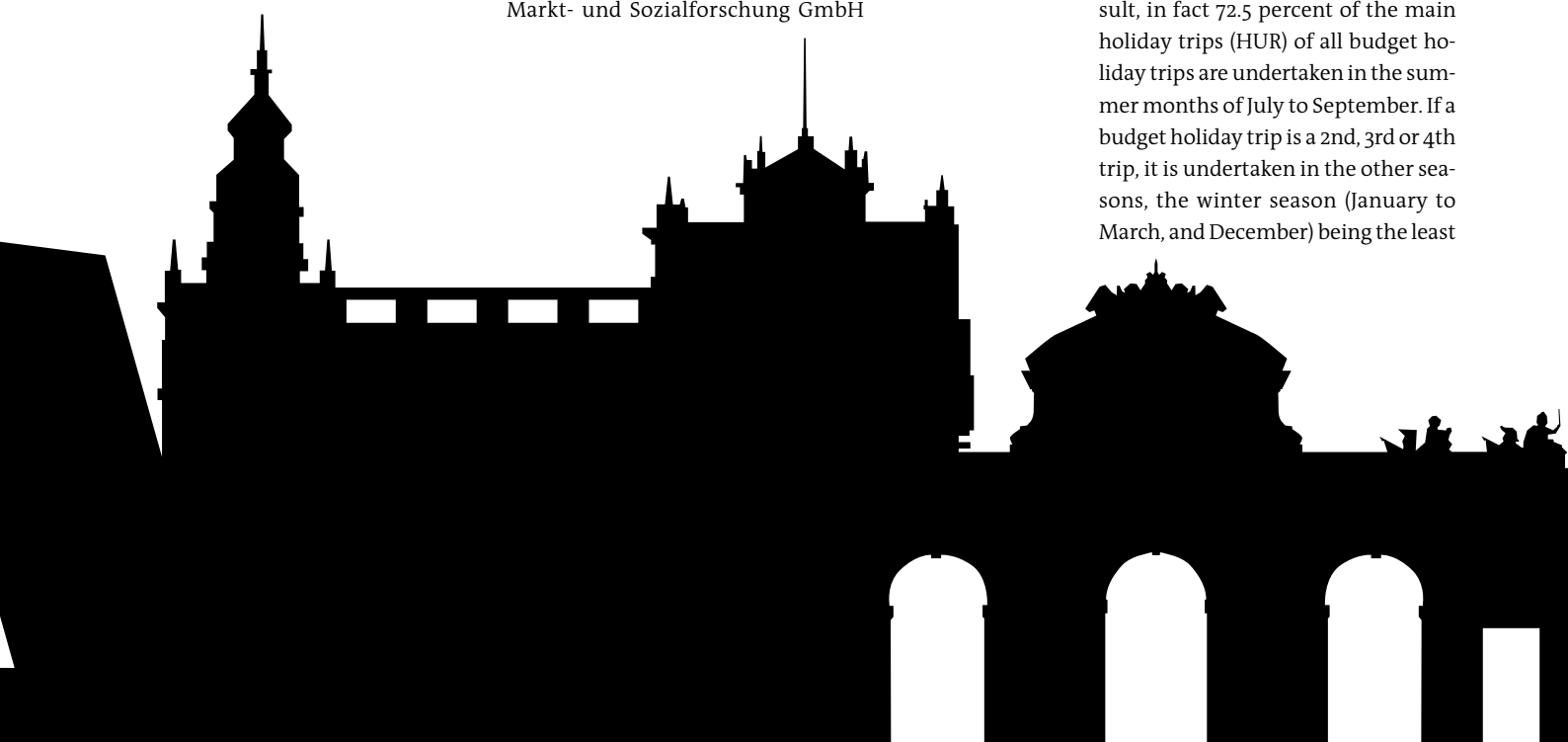


Table 8: Type of holiday trip

Type of holiday	Several answers possible		First preference (1 answer)	
	Budget travellers	Other travellers	Budget travellers	Other travellers
Active holiday	17,1%	18,2%	6,7%	6,9%
Adventure holiday	20,0%	25,6%	5,5%	7,2%
Relaxation holiday	37,4%	37,8%	11,7%	12,7%
Nature holiday	29,0%	28,7%	7,4%	8,0%
Beach/sunbathing holiday	38,9%	52,0%	15,7%	28,1%
Family holiday	47,3%	22,9%	35,5%	12,5%

popular. This could be an indication that winter holidays, in particular long-distance journeys, but also group skiing holidays are financially often not representable for budget travellers.

The choice of destination is considered on the basis of the percentage of budget travellers to a particular destination. No travel destination can be classified as a genuine budget destination as the percentage of budget travellers is always noticeably less than 50 percent. On the other hand, percentages noticeably above the overall average of 12.9 percent may indicate that these destinations are seen as being very attractively priced as regards total holiday trip expenditure (journey out, accommodation and cost of stay). Table 5 (Basis: Daten der Reiseanalyse 2016 / Travel Analysis Data 2016) gives a list of geographically grouped travel destinations in descending order as regards the percentage of budget travellers to them. The list shows clearly that of the 16 destinations with a noticeable higher percentage of budget travellers (percentage > 20%) only two of them are outside Germany: Denmark and the Benelux countries. At 51.6%, the percentage of budget travellers staying in Germany is noticeably higher than the figure for non-budget travellers (28.9%). Budget travellers

tend to avoid the southern European countries. This is because of the price structure in these countries in the summer months. Long-distance trips are the absolute exception among budget travellers because of financial restrictions.

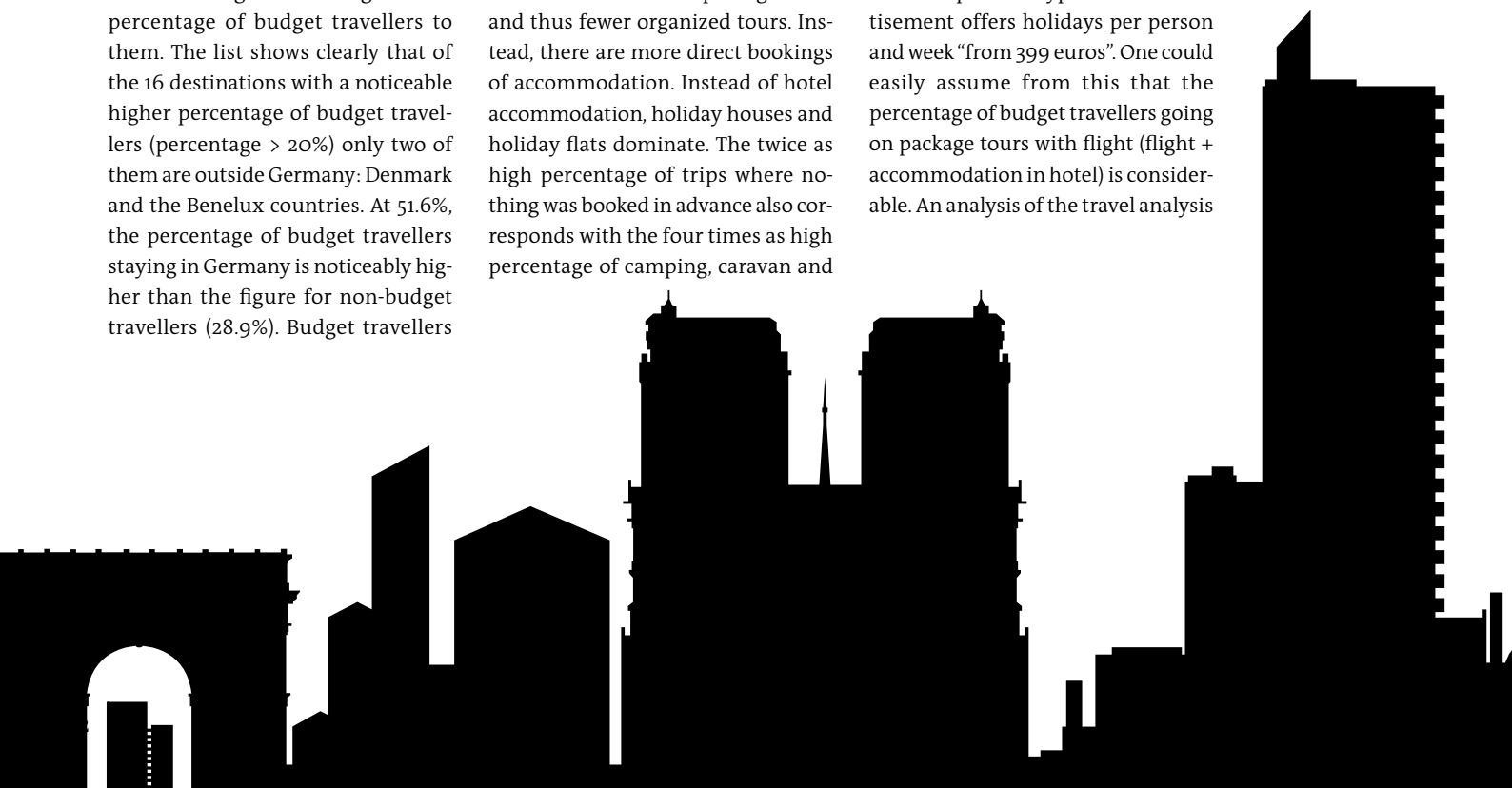
As regards duration of trip, there is little difference between budget travellers and all other types of travellers. For the former, the percentage who go on very long trips, i.e. trips lasting three weeks or longer, is slightly lower. Likewise almost identical is the length of the main holiday trips, the emphasis being on two-week trips, and for further trips a week to ten days.

Travel organization and execution

The high percentage of domestic trips and trips to neighbouring countries not far away underlines the differences between budget and other travellers. This means fewer package tours and thus fewer organized tours. Instead, there are more direct bookings of accommodation. Instead of hotel accommodation, holiday houses and holiday flats dominate. The twice as high percentage of trips where nothing was booked in advance also corresponds with the four times as high percentage of camping, caravan and

mobile home trips. The nearness of the destinations allows much greater use of private cars as means of transport. Air travel on the other hand is more the exception, as it means an excessive cost increase for families with several children. The overall picture shows that holiday destinations offering a wide range of low-cost holiday houses or holiday homes or low-cost alternatives for a camping holiday and which at the same time are easy to reach by car have a clear competitive advantage for budget travellers. This explains among other things the high market share enjoyed by Denmark and the Netherlands. Table 6 summarizes the results.

The intensive advertising by tour operators as well as by internet travel portals creates the impression that classical package tours with flight to warm beach and bathing resorts are offered at apparently extremely favourable prices. A typical such advertisement offers holidays per person and week "from 399 euros". One could easily assume from this that the percentage of budget travellers going on package tours with flight (flight + accommodation in hotel) is considerable. An analysis of the travel analysis





Mother with children in beach chair in Kühlingsborn, on the Baltic coast in Mecklenburg.

 Rene Legrand

data (cf. Table 7) however shows that the percentage is extremely low.

Travelling companions

An analysis of the travelling companions clearly shows one important reason why budget travellers travel economically. Almost all of them travel with companions, just under two thirds of them with three or more companions. At the same time, the percentage of those travelling with children is just a little more than one third. One can conclude from this that the third, fourth, fifth or further person is an adult family member from the budget traveller's household or circle of friends/acquaintances. For trips with flight and hotel accommodation, every additional adult is another full payer into the budget. When going by private car and staying in a holiday flat, a holiday home or camping, the additional cost per extra person is only marginal. And if the

travelling companions also help to finance the holiday by paying into the pot, this even reduces the costs per participant.

Mother with children in beach chair in Kühlingsborn, on the Baltic coast in Mecklenburg.

Types of holidays

For budget travellers, the most popular of all the different holiday types is a family holiday, whereas the other travellers name beach/sunbathing holidays the most often. Beach/sunbathing holidays, relaxation and nature holidays also play a particularly big role for budget travellers (cf. Table 8). If we differentiate between the main holiday trip and additional holiday trips, the figures for these categories increase even more, the family and relaxation aspects again


become even more obvious. With the additional trips (2nd, 3rd ... holiday trips) on the other hand, the family holiday clearly recedes into the background. Instead, the categories active holiday and adventure holiday increase noticeably in importance.

Conclusions for providers in the budget holiday trip market

An average three-person household has 319 euros available monthly to spend on leisure activities, entertainment and culture; half of all households in Germany even have noticeably less than 180 euros. If these households put away two thirds of this budget for a holiday trip, a three-person household has on average ca. 2,500 euros, half of all households have 1,440 euros or less to spend on all their holiday trips, i.e. short trips as well as holiday trips. Sections of these groups moreover have no choice but to go on holidays during the school holidays, either because they have children of school age or because of holiday regulations at their place of work. For them, the only holidays representable are those that, due to the choice of a geographically close destination and being able to go there by car, combined with low-cost accommodation, cost considerably less than the average prices of all the offers.

The aggressive advertising by tour operators in the lower and middle price segments and by providers of last-minute offers may create the impression that very cheap package deals to the Mediterranean countries are available to every consumer at any time. This impression does not reflect the reality in the main holiday season. Search in December 2016 for a two-week package deal (flight, hotel accommodation in a family room, half board) in July 2017 for a family with one child (9 years old) on diffe-

rent holiday portals and you will find hardly any offers of acceptable quality for less than 2,000 euros. The great majority of quality offers, i.e. hotels with at least 3 stars and good customer ratings, cost as a rule considerably more than 2,500 euros, often even more than 4,000 euros.

At the same time, the types of holiday trips and the number of traveling companions show that there are not only economic reasons for going on budget holidays. Instead, very often people wish to spend their holidays together with their family or friends, to relax together in a group or to undertake things together. As a result, they choose a type of accommodation that allows individual space and togetherness. In this respect, holiday homes, holiday flats or camping are very good options. That all of these, especially in Germany, the Netherlands and Denmark and when the costs are shared among many people, can very often even in the peak season be booked at a reasonable price, is an additional advantage. 

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