The impact of demographic change on tourism and conclusions for tourism policy

A study commissioned by the
Federal Ministry of Economics and Technology

Abridged version

July 2009

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At a glance

Subject The impact of demographic change on tourism and conclusions for tourism policy

Content Abridged version of the findings described in the comprehensive report

Prepared for

Bundesministerium für Wirtschaft und Technologie

(Federal Ministry of Economics and Technology)

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Translation Julia Cole, JMC Translations

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1. Motivation for the study

Demography describes the composition (size, distribution and structure) and development of human populations (Dinkel, 1989, Hillmann, 1994 and Fröhlich, 2000). The dimensions which are taken into account include gender, education, place of residence and income, or a combination thereof. Demographic change represents the changes in these population features.

Demographic change and particularly the rising number of older groups within the population are no longer future developments, but have long started. This applies to Germany as well as almost all other European countries and other industrialised nations, such as the USA and Japan. Within Germany, demographic change impacts on many aspects of society, politics and the economy. The discussion focuses, in particular, on the consequences for the future of social security systems and Germany's economic competitiveness (cf. Statistische Ämter des Bundes und der Länder (German Offices for National and Regional Statistics), 2007).

In this context, tourism should also be mentioned, as it plays a significant role in Germany (cf. DTV (German Tourism Association), 2008):

- Around 2.8 million people (including part-time and seasonal workers) throughout Germany are employed in sectors which are directly or indirectly linked to tourism (e.g. retail, public transport etc.).
- 8% of jobs depend on tourism.
- In 2007, the number of visitors arriving from within Germany and abroad totalled 129.9 million and accounted for 361 million overnight stays.
- In Germany, the tourism cross-sector generates total sales of around EUR 150 billion p.a.
- On average, 2% to 3% of net sales from tourism (excluding VAT) flow back to local authorities every year in the form of trade tax, tax on land and buildings and income tax as a proportion of tax revenue.

For the purposes of this study, tourism is examined from different perspectives comprising **demand**, **supply** and the **labour market**. The development of tourist demand is above all relevant to the tourism industry, destinations and marketers (including Deutsche Zentrale für Tourismus, the German tourist authority). Developments on the supply side relate in part to the public sector (road and rail infrastructure, cycle paths, water parks and townscapes) and in part to the private sector (hotel and restaurant industry and leisure facilities). Developments in terms of employment within the tourism industry impact on the decision-making of politicians, the administration and trade and industry.

However, tourism is not only impacted by demographic changes. Many other factors also impact on trends in tourism reflected in supply and demand (e.g. climate change, energy prices and the development of transport links). As part of this project, we therefore have not analysed what tourism overall will look like by 2020 but have focused on the impact of demographic change on the development of tourism.

Tourism policy is aimed at supporting tourism as a system in the interest of society and at managing the relevant areas. Accordingly, there are also correlations with other areas of politics. In this context, an urgent requirement is the examination of the direct and indirect effects of demographic change in terms of their relevance for tourism policy.

In order to ensure that the tourism policy of the German government is able to respond to new challenges, the Federal Ministry of Economics and Technology (BMWi) tasked the Institute for Tourism and Recreational Research in Northern Europe (*N.I.T.*, lead manager) to examine and/or derive, in cooperation with dwif-Consulting and TNS Infratest,

- how the various factors relating to demographic change impact on tourism,
- the extent to which the impact of demographic change may make it more difficult to achieve specific political aims or facilitate this,
- conclusions which can therefore be drawn for policy development.

2. Procedure

The project was divided into four work packages:

1. Analysis of the key data on demographic change and illustration of interfaces with tourism
2. Trend and effect forecast of tourist demand (Germany and abroad, holiday travel, short breaks, day trips and business travel), employment within the tourism industry and tourism services (infrastructure) up to 2020
3. Evaluation of the impact on tourism and derivation of the challenges facing tourism policy in Germany
4. Conclusions for tourism policy: options for action and areas of conflict relating to the German government's tourism policy

The process was almost exclusively based on existing data sources. A comprehensive new analysis of the data was carried out with regard to the specific issue being examined. This was supplemented by interviews with experts, which mainly centred on evaluating the findings of the analysis.

The findings of the first two work packages were made available to the Project Advisory Board[1] in the form of a written interim report and interim presentation and subsequently discussed with the members of the Board and partly revised. The detailed findings of all four work packages were described in separate written reports and presented as part of a public event at the BMWi in June 2009. They can be downloaded at www.bmwi.de.

[1] The members of the Project Advisory Board were Dr Norbert Schultes (Chairman), Regina Kazmierczak, Klaus Müller (BMWi), Dr Eckart Schnabel (Institute of Gerontology at the Technical University of Dortmund), Werner Sülberg (Tourism at REWE Group/Deutsches Reisebüro GmbH, deputy: Olaf Collet, Deutscher ReiseVerband), Ingrid Hartges (German Hotel and Restaurant Association, deputy: Sandra Warden) and Norbert Tödter (Deutsche Zentrale für Tourismus e.V.).

3. Key data on demographic change and interfaces with tourism

The aim of this work package is to provide a clear description of demographic change in Germany and selected other nations, which are relevant source markets, as well as to identify interfaces with tourism. The starting point therefore is the question of what happens in detail and how and where this may affect tourism as a system.

3.1. Key data on demographic change

The following features were selected as a basis for analysing demographic change: population development (volume), migration of the population, age structure, gender, educational structure, household structure and household income. The key sources relating to demographic change in **Germany** comprise data from the Federal Office for Building and Regional Planning (BBR) and the continuous population forecasts provided by the German Office for National Statistics (Destatis), which is supplemented by UN data where applicable. With regard to the analysis of demographic developments in **markets abroad**[2], data was largely obtained from the database of the UN Population Division (cf. UN, 2006).

Key data on demographic change up to 2020

	Demographic developments		
Feature	**Germany**		**Abroad**
Population development (volume)	To date: moderate increase, In future: slight decrease	Marked differences between the various federal states	Overall: rise (particularly sharp in the *emerging markets*), decrease in Japan and Italy
Migration of the population	More immigrants than emigrants Conurbations grow, structurally weak areas lose highest proportion		Net balance of migration in the top 10 countries positive, in the *emerging markets* negative
Age structure	More older people, fewer children		More older people (esp. in the top 10 countries and particularly in Japan)
Gender	Slightly higher no. of women will decline somewhat in future		Top 10 countries similar to Germany, *emerging markets* opposite trend
Educational structure	Increase in formal education		Increase in formal education (except in Italy, Austria and Japan)
Household structure	Households will become smaller, fewer households with children		Overall, households will shrink; marked differences between the various countries
Household income	To date: rise, in future: no data available		To date: rise, in future: no data available

Figure 1

2 Ten countries of origin account for approx. two thirds of overnight stays by foreign visitors in accommodation providing more than 8 beds. These top 10 source markets comprise the Netherlands, the USA, the UK, Switzerland, Italy, France, Austria, Belgium, Denmark and Japan. The growth markets, or emerging markets, which may play an increasingly important role as source markets for Germany in the future are China, the Gulf states, Russia and India.

Merging the findings from the analysis of the German market with those from the analysis of the relevant source markets abroad produces the overview of key data on demographic change up to 2020 shown in Figure 1. It is evident that demographic change affects at least five of the six features examined. The population volume decreases, migration (internal and international migration) increases, and age, gender, educational and household structures have all changed in recent years and will continue to change up to 2020. With regard to the future development of household income, no reliable data is available.

At the level of the German federal states, the analysis shows that demographic change comprises a geographical component. In Germany, there is a marked East-West contrast in terms of the development of population volume, and there are also other obvious patterns. Regional differences result mainly from migration. Demographic processes are responsible for population growth in some federal states and a decrease in others. Ageing of the population also varies in the different regions. While ageing in western Germany was moderate, it was far more marked in eastern Germany. This is due to the fact that in addition to a decline in the younger population as a result of low birth rates, there was a high level of migration. It can be assumed that demographic differences will become greater in future (BBR, 2009; Destatis, 2008).

3.2. Interfaces with tourism

Demographic change can affect different aspects of tourism. It impacts **directly** on tourist demand (volume and structure) and the tourism labour market (number of workers and their qualifications) and has an **indirect** effect on jobs within the tourism industry and tourism services (type and quality of sector-specific and enhancing infrastructure). These aspects are also known as direct and indirect interfaces with tourism. The nature of the impact on the volume and structure of tourism, booking and travel behaviour as well as the quality of the offering and tourism-related services is determined wherever an interface exists.

Demographic change up to 2020:
Typical examples of direct and indirect interfaces

Demographic feature	Interface		
	Demand (desire and ability to travel)	**Labour market** (workers and jobs)	**Supply** (tourism-specific and enhancing infrastructure)
Population development (volume)	Number of journeys and of people travelling	Number of workers and jobs available	Infrastructure utilisation
Migration of the population	Travel behaviour, in particular choice of destination ("roots travel")	Regional availability of workers and jobs	Regional infrastructure
Age structure	No. of journeys and of people travelling, travel behaviour (e.g. destinations and types of holidays)	Age of workers, types of jobs	Type of tourism-specific infrastructure
Gender	Holiday motivations and activities	Gender of workers, types of jobs	Type of tourism-specific infrastructure
Educational structure	Number of journeys and of people travelling, holiday motivations and activities	Qualifications of workers/availability of skilled workers, types of jobs	Type of tourism-specific infrastructure
Household structure	Number of people travelling	Flexibility of workers and employers (working hours, child care etc.), types of jobs	Accommodation (size and type)
Household income	Number of journeys and of people travelling and travel costs	Attractiveness of jobs depending on level of remuneration	Price level

Figure 2

With regard to the further project work, the interesting factor is which of the features examined are particularly important for tourism. Whether a feature has a relevant impact on tourism depends on

- the **volume** *(Is at least one of the relevant segments*[3] *large enough for a change to be evident?),*
- future **developments** *(Will anything change in one of the segments in future? How extensive will changes be?),*
- **specific behavioural patterns** *(Do pensioners travel differently from their younger counterparts and single parents differently from two-parent families? Do "new" emerging segments show different behaviour to "old" segments?)*

3.3. Conclusions for further action

The variations resulting from demographic change *may* be relevant to tourism as a system, but do not necessarily apply. Momentum that is significant to tourism will only arise in those groups (e.g. older people, children, the less affluent, single parents etc.) which represent a sizeable volume, will be considerably larger or smaller in future and whose behaviour differs from that of other groups.

In addition to the declining population volume, migration of people and the change in age structure are therefore at the centre of the tourism-related trend and effect forecast (work package 2).

[3] Every feature comprises various segments. "Segment" is defined here as pensioners or single parents, for example.

4. Trend and effect forecast

4.1. The impact of demographic change on domestic demand

Growth in incoming tourism has been considerable in recent years. However, domestic tourism plays a significantly greater role. Compared with 307 million overnight stays by visitors from within Germany, the number of overnight stays by tourists from abroad amounts to 55 million, i.e. domestic tourism accounts for an 85% share (DZT, 2008). Accordingly, the trend and effect forecast focuses on domestic demand.

The German population aged 14+ went on a total of 63 million holidays lasting five or more days and approx. 42 million short breaks (2 to 4 days) in 2007. In addition, 2.8 billion day trips[4] were made and 91 million business trips including an overnight stay. The following sections describe the effects which demographic change will have on these areas of tourism.

The tourist data used here comes from the Reiseanalyse (German Holiday Survey) conducted by Forschungsgemeinschaft Urlaub und Reisen (Tourism Market Research Group, F.U.R, 2008 and surveys from earlier years) and two Reiseanalyse-based modules regarding short breaks and city breaks (Grimm & Winkler, 2007 and Meinken, 2005) and is supplemented with information from the RA Trend Surveys (Lohmann & Aderhold, 2009 and Lohmann, Aderhold & Zahl, 2004). Furthermore, the dwif publications on day trips by Germans (Maschke, 2007, 2006, 2005 and 1995) and the survey on business travel involving overnight stays in the German source market (TNS Infratest/DZT, 2008) have also been used.

4.1.1. Holiday travel (minimum of 5 days)

Initially, we take a look at holiday travel (minimum duration of five days; for a definition, see Lohmann & Aderhold, 2009). The analysis of the effects of the demographic change forecast shows that a slightly decreasing **population volume** would have no noteworthy impact on quantitative demand for holidays and the number of trips undertaken by Germans within Germany and abroad if travel propensity and frequency remain constant.

Given the scarcity of data available, the only possible statement with regard to the impact of international **migration** is that a rise in the number of migrants may result in a slight reduction in the number of holidays within Germany in the long term. There is an urgent requirement for further research in this respect.

Among the dimensions of demographic change, the change in **age structure** is particularly relevant to the demand for holidays. It results in a new division of holiday-makers in terms of age groups, with senior citizens playing a greater role and the importance of younger age groups diminishing in quantitative terms. This is also associated with a change in travel behaviour.

4 Year under review: 2006

Volume and structure of the German population and of holiday-makers in 2007 and 2020

	German population (14+) 2007		**Holiday-makers 2007**		German population (14+) 2020		**Holiday-makers 2020***	
	%	m	**%**	**m**	%	m	**%**	**m**
Teenagers and young adults (14 to 29 years)	22	13.96	**22**	10.67	19	12.39	**19**	9.47
Adults (30 to 59 years)	50	32.37	**52**	25.18	48	31.01	**50**	24.13
Senior citizens (60+)	28	18.49	**26**	12.28	33	21.30	**31**	15.29
Total	100	64.82	**100**	48.13	100	64.70	**100**	48.89

* *Estimate assuming stagnant travel propensity figures for the age groups up to 60 years and an estimated travel propensity of 79% for 60 to 69-year-olds, of 77% for 70 to 79-year-olds and of 50% for the 80+ age group.*

Basis of data: F.U.R, RA 2008; BBR, 2006

Figure 3

In order to be able to make concrete statements on the effects of the changing age structure, we estimated the age structure of holiday-makers and the travel volume attributable to the individual age groups as well as their travel behaviour. There are essentially two options when it comes to examining future tourist demand. Both **segment-specific** and **cohort-specific** travel behaviour is conceivable.

We assume that people aged up to 60 display segment-specific travel behaviour. This means that the holiday travel behaviour of young adults and people with young children, for example, is geared towards their circumstances (**segment rule**). For these target groups, we therefore anticipate an unchanged level of travel propensity and frequency in the future. With regard to the 60+ age group, we assume cohort-specific behaviour, which is essentially shaped by previous life experience. The future travel behaviour of this group can be estimated to a certain extent on the basis of the travel behaviour of the same cohort (= group of people) in earlier years (**cohort rule**).

Figure 3 shows the changing age structure in relation to overall demand. The increasing importance of senior citizens in an otherwise stable demand market is evident. We assume that the shift in age structure will result in a reduction of 1.2 million holiday-makers among teenagers and young adults and a reduction of 1.0 million in the adult age group. At the same time, the number of holiday-makers aged 60+ would increase by 3.0 million.

Adding up the number of holiday-makers in the different age groups produces a total of 48.89 million **holiday-makers** (+0.8 million).

Volume and structure of holiday-makers and of holidays in 2007 and 2020

	Holiday-makers 2007		**Holidays 2007**		Holiday-makers 2020*		**Holidays 2020***	
	%	m	**%**	**m**	%	m	**%**	**m**
Teenagers and young adults (14 to 29 years)	22	10.67	**20**	**12.80**	19	9.47	**18**	**11.36**
Adults (30 to 59 years)	52	25.18	**52**	**32.73**	50	24.13	**50**	**31.37**
Senior citizens (60+)	26	12.28	**27**	**17.19**	31	15.29	**32**	**20.30**
Total	100	48.13	**100**	**62.72**	100	48.89	**100**	**63.03**

* *Estimate using the cohort and segment rule on the basis of the RA 2008 German Holiday Survey.*
Due to the effects of rounding, the total of individual cells varies from the overall figure in some cases.

Data source: F.U.R, RA 2008

Figure 4

With regard to the number of **holidays** undertaken in 2020, we expect the following adjustments as a result of demographic change:

- 11.36 million holidays by 14 to 29-year-olds (down 1.4 million on 2007)
- 31.37 million holidays by 30 to 59-year-olds (down 1.3 million)
- 20.30 million holidays by those aged 60+ (9.98 million holidays by 60 to 69-year-olds, 7.12 million holidays by 70 to 79-year-olds and 3.2 million holidays by those aged 80+) (up 3.2 million)

As part of the report, another aspect examined - using the volume of holiday travel by senior citizens as an example - was the result achieved by replacing the cohort approach with the life stage approach. This is based on the assumption that holiday travel behaviour changes fundamentally after retirement age. On the basis of the cohort approach, growth in holidays undertaken by those aged 60+ amounts to 3.25 million while the figure is 2.25 million if the life stage approach is applied. This means that although the estimates based on the two different approaches suggest different volumes for 2020, they do not point in different directions. In both cases, senior citizens would represent the driving force of growth in tourism in the near future.

In connection with the effects of the change in age structure, the segment of **holiday travel with children** (under the age of 14) is also relevant. Here, the structure of the household also impacts. As a result of demographic change and based on the segment-specific approach, the trend is a slight decrease from 12.7 million holidays in 2007 to 12.1 million holidays in 2020. Since other factors also impact in addition to demographic change, actual values may vary within an expected range of 10 million to 13 million holidays with children.

In tandem with the change in the demographic structure of demand, behaviour while on holiday as well as motivations and requirements will also change. Figure 5 provides an overview of these age group-specific trends resulting from demographic change. The data does not represent a forecast of the development of tourism overall. The synopsis indicates absolute figures in some cases and deliberately only provides trend figures in others. This is mainly due to the fact that the accuracy of the projection varies for different aspects and only some of the results are quantifiable. Where it was possible to apply the cohort rule, results are relatively accurate, for example for the volume of holiday travel by senior citizens. In other cases, they are inevitably vaguer.

Overall, the expected impact of demographic change on demand for holidays in Germany can be summarised as follows:

- Slight increase in demand
- Shift in the structure of demand, with the importance of senior citizens for tourism rising more rapidly than their share of the population
- Only a slight decrease in holidays with children
- Shifts in travel behaviour[5], resulting in particular from journeys made by people in the age group of 60 to 79 years, include:
  - a higher proportion of journeys abroad and fewer journeys within Germany,
  - more air travel and car journeys, less travel by coach and rail,
  - lower seasonality (fewer summer holidays)
  - greater significance attributed to culture, nature and health, with a decline in beach and relaxing holidays at the same time

[5] When calculating the overall effects, it should be noted that not all three segments may be added up, but only holidays by senior citizens and holidays by young people and adults under 60. Holidays with children are already included in these two segments.

Age group-specific impact of demographic change on holidays…

	… by senior citizens	**… by young people and adults under 60**	**… with children**
Demographic development 2007 to 2020 acc. to BBR	+3.3 million in 60+ age group[6]	-2.9 million, 14 to 59-year-olds[7]	-1.0 million children (up to 13 years)
Abstract effect ("rule")	Continuation of major travel behaviour patterns acc. to cohort.	Segment-specific travel behaviour is continued by next generations.	Segment-specific travel behaviour is continued by next generations.
Concrete impact on German-speaking population living in private households (2007 → 2020):			
Holiday travel volume	+3.0 million holiday-makers (of which: +2.0 million aged under 80), +3.2 million holidays (of which: +2.0 million by those under 80)	-2.3 million holiday-makers -2.8 million holidays	-0.6 million holidays
Internet usage	More Internet	No impact	No impact
Destinations	-1.2 million journeys in Germany, +3.2 million journeys abroad*	-0.7 million journeys in Germany, -2.2 million journeys abroad	-0.2 million journeys in Germany, -0.4 million journeys abroad
Accompanied travel	More journeys with child(ren)*	More journeys without child(ren), more 1-child journeys	More 1-child journeys
Means of transport (selection)	+2.6 million flights, +1.7 million car journeys, -1.6 million coach journeys, -0.5 million rail journeys*	-1.2 million flights, -1.4 million car journeys, -0.2 million coach journeys, -0.1 million rail journeys	-0.2 million flights -0.4 million car journeys
Travel organisation	+0.6 million package/module-based holidays*	-1.2 million package/ module-based holidays	-0.2 million package /module-based holidays
Accommodation (selection)	+1.1 million holidays in holiday flats/homes, +0.7 million hotel/guest house holidays*	-0.7 million holidays in holiday flats/homes -1.3 million hotel/ guest house holidays	-0.2 million holidays in holiday flats/homes -0.2 million holidays in hotels
Seasonality	Lower seasonality*	Fewer summer holidays	No impact
Type of travel	In particular, more culture-based holidays, more nature-based holidays, more health-focused holidays*	Fewer beach holidays, relaxation holidays, fun/party holidays and all-inclusive holidays	Fewer family holidays and beach holidays
Holiday motivations and activities	Less regeneration, more culture, more nature, more health-focused*	Less playing with children, less swimming, less clubbing, less regeneration	Less playing with children, less swimming, fewer leisure/theme park visits

** Excluding holidays by those aged 80+*

Figure 5

6 +1.34 million 60 to 69-year-olds, +0.24 million 70 to 79-year-olds and +1.75 million aged 80+

7 -1.65 million 14 to 29-year-olds and -1.23 million 30 to 59-year-olds

4.1.2. Short breaks (2 to 4 days)

The analysis of the effects of the demographic change forecast on the segment of short breaks (duration of two to four days or one to three overnight stays) reveals similar developments in terms of type and direction to those for holiday travel. However, the market for short breaks is subject to far greater variability. Against this backdrop, the effects of demographic change appear rather unspectacular.

The impact of the slight **decrease in population**, while the short break propensity and short break frequency remain the same, can be assessed as relatively minor overall.

No statement can be made regarding the effect of **migration** on short breaks due to a lack of data. Further research is required in this respect.

The changes in **age structure** mean that the structure of the demand for short breaks is changing substantially. Similar to holiday travel, this relates in particular to the growing importance of the age group of senior citizens.

Composition of holiday-makers on short breaks in 2007 and 2020

	German population 14+ 2007		**Holiday-makers on short breaks 2007**		German population 14+ 2020		**Holiday-makers on short breaks 2020***	
	%	m	**%**	m	%	m	**%**	m
Teenagers and young adults (14 to 29 years)	22	13.96	**22**	**5.24**	19	12.39	**19**	**4.66**
Adults (30 to 59 years)	50	32.37	**51**	**12.04**	48	31.01	**48**	**11.45**
Senior citizens (60+)	28	18.49	**27**	**6.29**	33	21.30	**33**	**7.90**
Total	100	64.82	**100**	**23.57**	100	64.70	**100**	**24.01**

* *Estimate assuming stagnant short break travel propensity figures for the age groups up to 60 and short break travel propensity of 40% for 60 to 69-year-olds, of 42% for 70 to 79-year-olds and of 25% for the 80+ age group.*

Source: F.U.R, RA 2008; BBR, 2006

Figure 6

Figure 6 highlights the growing importance of senior citizens in an otherwise relatively stable demand market. We assume that the shift in age structure will result in a decrease in the number of people on short breaks of 0.6 million in the age group 14 to 29 and of 0.4 million in the age group 30 to 59. Conversely, the number of people on short breaks aged 60 or over would rise by 1.6 million. Overall, demographic change is expected to result in an increase in the number of people on short breaks from 23.57 million to 24.01 million in 2020 (+0.4 million).

Given the sharp rise in travel relating to short breaks by senior citizens (+3.46 million short breaks), by 2020, the total number of short breaks is expected to increase by 1.55 million due to demographic changes, despite an estimated decline in short breaks by 14 to 29-year-olds (-1 million) and 30 to 59-year-olds (-0.9 million) (cf. Figure 7).

Volume and structure of holiday-makers on short breaks and of short breaks in 2007 and 2020

	Holiday-makers on short breaks 2007		**Short breaks 2007**		Holiday-makers on short breaks 2020*		**Short breaks 2020***	
	%	m	**%**	**m**	%*	m**	**%**	**m**
Teenagers and young adults (14 to 29 years)	22	5.24	**21**	**8.92**	19	4.66	**18**	**7.92**
Adults (30 to 59 years)	51	12.04	**52**	**21.67**	48	11.45	**48**	**20.76**
Senior citizens (60+)	27	6.29	**27**	**11.33**	33	7.90	**34**	**14.79**
Total	100	23.57	**100**	**41.92**	100	24.01	**100**	**43.47**

* *Estimate using the cohort and segment rule on the basis of the RA 2008 German Holiday Survey.*
Due to the effects of rounding, the total of individual cells varies slightly from the overall figure in some cases.

Data source: F.U.R, RA 2008

Figure 7

Figure 8 on the following page provides an overview of the age group-specific impact of demographic change on short breaks. The synopsis indicates absolute figures in some cases and deliberately only provides trend figures in others. This is mainly due to the fact that the accuracy of the projection varies for different aspects and only some of the results are quantifiable.

Overall, the expected impact of demographic change on demand for short breaks in Germany can be summarised as follows:

- Slight increase in demand
- Shift in the structure of demand, with the importance of senior citizens for tourism rising more rapidly than their share of the population
- Only a slight decrease in short breaks with children
- Shifts in travel behaviour[8], resulting in particular from journeys made by people in the age group of 60 to 79 years, include:
  - a higher proportion of journeys abroad and fewer journeys within Germany,
  - more air travel and car journeys, less travel by coach and rail,
  - more holidays with hotel accommodation, fewer overnight stays with friends and family.

[8] When calculating the overall effects, it should be noted that not all three segments may be added up, but only short breaks by senior citizens and short breaks by young people and adults under 60. Short breaks with children are already included in these two segments.

Age group-specific impact of demographic change on short breaks…

	… by senior citizens	**… by young people and adults under 60**	**… with children**
Demographic development 2007 to 2020 acc. to BBR	+3.3 million in 60+ age group[9]	-2.9 million, 14 to 59-year-olds[10]	-1.0 million children (up to 13 years)
Abstract effect ("rule")	Continuation of major travel behaviour patterns acc. to cohort.	Segment-specific travel behaviour is continued by next generations.	Segment-specific travel behaviour is continued by next generations.
Concrete impact on German-speaking population living in private households (2007 → 2020):			
Holiday travel volume	+1.6 million people on short breaks (of which: +1.1 million under 80); +3.5 million short breaks (of which: +2.3 million by those aged under 80)	-1.2 million people on short breaks, -1.9 million short breaks	Fewer people on short breaks with children in their household, no clear trend in short breaks
Internet usage	+0.8 million Internet bookings*	-0.3 million Internet bookings	No estimates possible
Destinations	+1.5 million journeys in Germany, +0.8 million journeys abroad*	-1.3 million journeys in Germany, -0.6 million journeys abroad	
Means of transport	+2.5 million car journeys, +0.5 million flights, +0.2 million rail journeys, -0.9 million coach journeys*	-1.1 million car journeys, -0.2 million flights, -0.3 million rail journeys, -0.2 million coach journeys	
Travel organisation	+1.3 million direct bookings, -0.3 million package holidays*	-0.6 million direct bookings, -0.3 million package holidays	
Accommodation	+1.1 million hotel stays, +0.6 million overnight stays with friends/ family*	-0.7 million hotel short breaks and -0.9 million short break stays with friends/family	

** excluding short breaks by those aged 80+*

NB: the total of the figures for means of transport, travel organisation and accommodation deviates from travel volume in each case, because they represent selected possible responses but are not exhaustive.

Figure 8

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9 +1.34 million 60 to 69-year-olds, +0.24 million 70 to 79-year-olds and +1.75 million aged 80+

10 -1.65 million 14 to 29-year-olds and -1.23 million 30 to 59-year-olds

4.1.3. Day trips

Rising mobility and changes in behaviour relating to day trips compensate for the effects of demographic change (population development, age structure) by 2020, i.e. those aged 65+ may become the most important target group for day trip travel. At the same time, significant market share will be lost with respect to those aged 15 to 44. The growing importance of older target groups is expected to result in an overall sales increase in terms of day trips.

4.1.4. Business travel

In view of the fact that the lack of long-term time series restricts the types of analysis possible, the findings provide no indication of a noteworthy impact of demographic change on the volume of business travel.

4.1.5. The impact of demographic change on international demand

Demographic change in the international source markets will only have a very limited impact on incoming tourism in Germany. Key factors, such as the enhanced image of Germany and the high level of business travellers, are determinants which may impact on all socio-demographic target groups, or may remain largely unaffected by the process of demographic change. Opportunities will arise in relation to cultural tours and city breaks. However, rapidly increasing competition from Central and Eastern Europe as well as South-East Europe may prevent significant growth in this respect.

Summary

The key trends and effects for **tourist demand** up to 2020 resulting from demographic change are as follows:

Holidays and short breaks

- Volume: rise in the number of journeys abroad with overnight stays, decrease in the number of journeys within Germany with overnight stays
- Structure: shift in market shares between age groups – greater importance of senior citizens and families with 1 child, constant or slightly rising share of people with health problems
- Travel behaviour: lower seasonality, more car journeys, more cultural tours and journeys with a focus on health and nature

Day trips:

- The importance of senior citizens will also increase in respect of day trips.

Business travel:

- No discernible impact on business travel

International demand:

- Hardly any discernible impact on tourist demand

4.2. The impact of demographic change on employment in the tourism industry

In terms of tourism in Germany, according to current estimates approx. 2.8 million employees work in sectors which are directly or indirectly linked to tourism (e.g. hotel and restaurant industry, transport companies and retail) incl. part-time and seasonal workers. The proportion of jobs depending on tourism in relation to overall employment in Germany therefore amounts to 8% (German Institute of Economic Research, 1999; Gesellschaft für Wirtschaftliche Strukturforschung (Association for economic and structural research), 2003).[11] The around 1.3 million employees in the hotel and restaurant industry alone account for 3.7% of all employees in Germany. 58% of those employed in the hotel and restaurant industry are women and 42% men. Part-time workers account for a share of 44% (German Office for National Statistics, 2006a).

In order to estimate the future impact of demographic change on the employment market in the tourism sector, the strengths and weaknesses of this employment sector were taken into account (see also Association of Eastern German Savings Banks, 2001) along with statements on risks and opportunities in view of the expected demographic developments. Selected data, e.g. from school statistics, the German Association of Chambers of Commerce and Industry (DIHK) and the OECD, was used as a basis. Estimates regarding the number of potential future workers are based on the BBR population forecast 2002-2020 (BBR, 2006).

The analysis highlights the following key trends and effects of demographic change for **employment in the tourism industry** in Germany up to 2020:

- No noteworthy reduction in the number of workers up to 2020
- Structural change: ageing potential workforce
- Lack of skilled workers, growing competition for qualified staff
- Problems in terms of succession in companies, especially in small companies in the tourism sector

4.3. The impact of demographic change on tourism supply (infrastructure)

The next aspect to be examined was the potential indirect impact of demographic change on the offering for tourists, in particular tourism infrastructure. Basic findings particularly for eastern Germany were established as part of the Sparkassen-Tourimsmusbarometer (Savings Banks Tourism Barometer) 2008 under the sector topic “The impact of demographic change on tourism”. Building on these considerations, the findings were extrapolated to Germany as a whole. Data sources included the German Office for National Statistics, government and regional government offices, the Deutsches Seminar für Städtebau und Wirtschaft (2007, German Seminar for Urban Development and Commerce), Deutsche Bank Research (2004), Sparkassen-Tourismusbarometer (2008, Savings Banks Tourism Barometer for Germany) and company comparisons, supplemented by meetings with experts.

[11] Unfortunately, more up-to-date figures are not available.

The infrastructure relevant to tourism comprises far more than hotels, tourist information centres, cycle paths and hiking trails. It also includes the transport links, local construction development, retail and restaurant trade as well as parks and other green spaces that are relevant for local residents and tourists. Depending on location and facilities, the cultural, sport and leisure offering, swimming pools and thermal baths are used to a greater or lesser extent by tourists and/or local residents. Consequently, the quantity and quality of these services have a decisive influence on the overall travel experience. As illustrated in Figure 9, the private and public sectors participate in making available and maintaining the infrastructure which is relevant to tourism (OSV, 2008).

Figure 9

As a rule, the prerequisite for the existence of or putting in place the above-mentioned infrastructure is sufficient demand from residents and/or tourists. Here, demographic change may create new conditions, which will then impact on the type and scope of the tourist offering at regional level.

The following developments that are determined by demographic factors are foreseeable in terms of tourist **supply** up to 2020:

- Demographic growth regions, i.e. regions with rising demand from the population: higher level of infrastructure utilisation and possibly an expansion of supply
- “Shrinking regions”, i.e. regions where demand from the population is continuously decreasing: lower level of infrastructure utilisation (in particular for enhancing infrastructure) and as a result, a tendency for a thinning in the offering

5. Trend and effect forecast for tourism in selected regions

In order to establish the existing potential as well as the challenges and opportunities resulting from demographic change for various regions in Germany, regional impact analysis is required. To do this, the German districts and cities have been typed on the basis of tourism-related and demographic data and six destinations have been selected as prototypes. These example regions are used to illustrate the expected impact of demographic change on tourism in different regional types.

The following six example regions have been selected for the analysis of the regional impact of demographic change: Western Pomerania, Harz, Lausitz, the North Sea coast of Schleswig-Holstein, the Alps of Upper Bavaria and the City of Cologne.

The development of tourist demand in the six example regions is primarily influenced by the change in age structure while movements in the tourism labour market and tourism supply are mainly linked to the change in age structure and the volume and direction of internal migration as well as population volume.

The key trends and effects of demographic change on tourism in the various regions up to 2020 are summarised below:

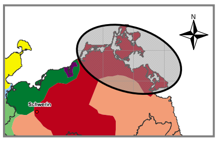
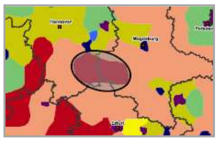
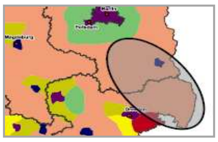
Western Pomerania  Features: Region on the Baltic Sea with a high level of overnight stays, decreasing population volume, diminishing number of wage earners and salaried employees and low purchasing power ■ Demand: stagnation in holidays, rise in the number of short breaks, impact on day trips unclear, barely any impact on business travel and very low impact on international demand ■ Labour market: shortage of skilled and young workers is worsening, sharp rise in the importance of older workers, access to training in companies and vocational colleges is deteriorating ■ Supply: opportunities for better utilisation during low season, expansion of offering geared to tourist requirements (transport, retail and health-oriented tourism) have a stabilising impact with benefits for local residents	**Harz**  Features: Low mountain range with a high level of overnight stays, decreasing population volume, diminishing number of wage earners and salaried employees and low purchasing power ■ Demand: decrease in the number of holidays, uncertainty with regard to short breaks and day trips, barely any impact on business travel and low impact on international demand ■ Labour market: shortage of skilled workers in view of specialist requirements, growing importance of older workers, Harz (work) places vs. (residential) places on the fringe of the Harz makes access more difficult ■ Supply: declining utilisation and/or market correction, supra-regional attractiveness determines success, some unattractive townscapes and high vacancy rates

Figure 9

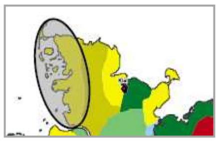
Lausitz



Features:
Flat/hilly countryside with lakes and rivers, low to medium level of overnight stays, decreasing population volume, diminishing number of wage earners and salaried employees and low purchasing power

- Demand: rise in the number of holidays and short breaks (currently very low level), impact on day trips is unclear, barely any impact on business travel and low impact on international demand
- Labour market: slight shortage of skilled and young workers in view of specialist requirements and growing importance of older workers
- Supply: development of (high-quality) tourist offering difficult in “uncharted tourist territory”, vacant buildings and thinning out of offering in some areas with a decrease in the population and at large

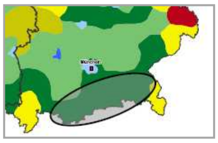
North Sea coast Schleswig-Holstein



Features:
Coastal region with a high number of overnight stays, stagnant to decreasing population volume, diminishing number of wage earners and salaried employees and low to medium purchasing power

- Demand: steady demand for holidays and short breaks, impact on day trips is unclear, barely any impact on business travel and very low impact on international demand
- Labour market: continually worsening shortage of young people, in particular on islands, and growing importance of older workers
- Supply: utilisation in low season represents a challenge, tourism has a stabilising effect on coastal areas and islands (transport and retail), greater demand for infrastructure and offering that is relevant to tourism and tailored to the age of target groups

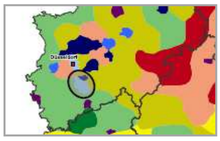
Alps – Upper Bavaria



Features:
Alpine region with a high level of overnight stays, stagnant to rising population volume, stagnant to increasing number of wage earners and salaried employees, purchasing power varies

- Demand: decrease in the number of holidays, rise in the number of short breaks, impact on day trips is unclear, barely any impact on business travel and increase in international demand
- Labour market: increasingly difficult to recruit young people (incl. succession arrangements), but main reason is competition in the sector, slightly rising importance of older workers
- Supply: if offering is adjusted (winter sports, leisure, health farms and spa facilities), increased utilisation and rising potential demand (also from international visitors) for expansion of offering possible, potential to expand transport infrastructure

Cologne



Features:
Major city with medium to high level of overnight stays, stagnant to rising population volume, stagnation or rise in the number of wage earners and salaried employees, purchasing power varies

- Demand: steady demand for short breaks, impact on day trips is unclear, barely any impact on business travel and rise in international demand
- Labour market: wide-ranging supply of qualified skilled workers, slight rise in the importance of older workers
- Supply: increased utilisation is probable (incl. day-trippers), rising potential demand (also from international visitors) for expanding the offering

Figure 10

The findings show that tourism-related effects of demographic change may also vary in same-type regions. This is evident in the comparison of Western Pomerania and the Harz region. These variations are based on

- the current demographic situation in a specific region,
- trends in terms of changes in this situation, particularly with regard to migration,
- the status quo in terms of tourism in a specific region (factors that determine attractiveness, offering, accessibility; demand volume and structure) and
- foreseeable changes (resulting from demographic change) in terms of the demand for preferred destinations.

6. Expert evaluation and derived requirement for action

As part of the “evaluation” work package, the tourism-related impact of demographic change was assessed from various perspectives in expert meetings. The evaluation provided the following results:

The greatest **challenges** for tourism resulting from demographic change comprise a decrease in the volume of travel within Germany, an increase in the importance and heterogeneity of target groups (in particular, the rising proportion of senior citizens) and the regional shortage of skilled workers.

The range of solutions proposed during interviews with experts highlights the difficulty of analysing the impact of demographic change on an isolated basis. Demographic change is closely linked to other social and tourism-related developments and is “just” one of many factors which determine the success or failure of tourism in Germany.

Experts largely agree on the **aims** that tourism policy should pursue with the support of related areas of politics. The focus is on strengthening domestic tourism and reducing regional disparities, promoting the employability of older workers and securing a workforce (especially skilled workers). In addition, it was pointed out that policy should also promote equal participation of any disadvantaged sections of society (e.g. the poor, elderly and disabled people) in tourism, in order to maintain or enhance their quality of life.

With regard to the **requirement for action**, it emerges that the primary task of politicians must be to create the general conditions which will enable various market players to face the impact of demographic change proactively. As is to be expected, the possibilities for politicians to influence the aspects of supply & products and communications & sales are considerably fewer. As a general rule, destinations and service providers have a duty to take action in this respect.

7. Conclusions for tourism policy and related areas of politics

As part of this study, a large number of options for action and the responsible market players were identified in relation to the most important tourism-related consequences of demographic change, taking into account the tourism policy aims of the German government (German Bundestag, 2008).

The table below shows which of these options for action the experts believe may be particularly relevant to tourism policy and related areas of politics within the remit of the German government. In some cases, the options for action mentioned may also give rise to potential conflict. For example, more attractive conditions of employment within tourism result in higher labour costs etc. and this may lead to higher prices and therefore poorer conditions for competition. The options for action therefore require political debate to determine an order of priority, taking into account potential conflicts of interest.

Aspect	Area of politics and option for action	Conflicts of interest/parties involved
Supply and demand	▪ *Tourism policy:* strengthen Germany as a tourist location and/or the international competitiveness of domestic destinations	▪ Companies which focus on outgoing tourism
	▪ *Tourism policy:* promote measures that enhance the attractiveness of domestic destinations for senior citizens from Germany and abroad	▪ Companies which focus on outgoing tourism ▪ Destinations and/or providers which primarily focus on other target groups
	▪ *Tourism policy:* check whether regions where the population is shrinking offer new tourist potential (targeted boost to structure, e.g. in nature-oriented tourism)	▪ Conflicts of use with other areas of politics and economic sectors, which intend to use areas of low population density (e.g. to produce energy)
	▪ *Transport policy:* promote mobility offering that is in line with demand, taking particular account of the needs of older target groups (arrivals/departures, local mobility)	▪ Costs cannot be recovered due to low utilisation levels during the low season and in regions where the population is shrinking.

Figure 11

Aspect	Area of politics and option for action	Conflicts of interest
Labour market	■ *Tourism policy:* more attractive conditions of employment within the tourism industry to facilitate the possibility of longer years of service ■ *Tourism policy:* qualifications for those working in tourism and a more professional approach to every aspect of their career (lifelong learning) ■ *Tourism policy:* examine how the regional effects of demographic change on the tourism labour market may be influenced ■ *Education policy:* generally improve schooling and enhance the image of tourism as a sector with career opportunities (with support from providers of tourism-related services) to secure young talent	■ Competitive position of Germany as a tourist location is deteriorating due to rising costs/prices ■ Competitive position of Germany as a tourist location is deteriorating due to rising costs/prices ■ Tourism is in competition with other economic sectors, which also apply for research funds. ■ Tourism is in competition with other economic sectors, which also intend to enhance their image.
General	■ *Tourism policy, pensioner policy:* proactively work to dispel the negative image of senior citizens	-

Figure 12

The impact of demographic change at national as well as at federal state and regional level can be seen as an opportunity or a risk for tourism in Germany. Demographic change may be seen as a threat in one region, which the region tries to counteract, while other regions may welcome the same development and endeavour to exploit it. To prevent different actions from cancelling each other out, a key political task involves ensuring the overall coordination of the approach to the tourism-related impact of demographic change.

Careful examination of the many facets of demographic change and its possible effects on tourism has shown that these effects, particularly those relating to tourist demand, appear manageable overall. Demographic change will not result in a completely different type of tourism. Instead, it will impact on development in combination with many other factors. With regard to tourism in Germany – differentiated by region – opportunities and challenges arise, the exploitation or management of which will strengthen tourism overall.

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