



Press Release

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German travel market remains uncertain in 2010

Findings of the GfK TravelScope survey on Germans' travel behavior

Nuremberg, January 15, 2010 – The signs of economic recovery are not yet resulting in a return to normal vacation behavior among consumers. So far, Germans have planned 55.4 million vacations of more than five days for the 2010 tourism year, which runs from November 2009 to October 2010. This corresponds to 3.7% fewer than in the same period of the prior year.

The current winter season, which runs from November 2009 to April 2010, is presently down by 3.1%, and the summer season is currently recording a decline of as much as 4.1%.

Only one in four trips have been booked already

Germans are not yet able to assess how the general economic situation and their personal circumstances will develop over the course of the year, and are therefore displaying caution in their vacation planning. This is underlined by the fact that the number of trips that have not yet been booked, but which are considered definite, has dropped by 600,000 (7.7%).

Firm bookings have been made for only a fraction of these planned vacations. The percentage of advance bookings for the 2010 tourism year currently stands at 24.8%, which means that only one in four trips planned by Germans for 2010 is already completely or partially booked. For the summer season, this percentage is just 13.5%, because there is more time remaining before travel commences.

Senior citizens still like to travel

Not all segments of the population are equally affected by the developments on the labor market. This year, the over-65s will be an even more important factor for the travel industry. This group is currently planning around 10% more trips than in the previous year. It is therefore almost certain that, as in the past five years, cruise bookings will once again see almost double-digit growth in 2010.

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Financially well-off households with a net monthly income of over EUR 3,250 are also less restricted in their vacation choices, and their planned trips are up by around 6%.

Germany very popular as a travel destination

Germany continues to enjoy particular popularity as a travel destination. Planned trips for the current year are already 2.8% higher than in the same period of the prior year. However, the German travel industry is only benefiting to a limited extent. In 2009, Germans took just under 68 million trips with at least one overnight stay within Germany, which corresponds to around one in two trips. However, they only spent approximately EUR 8.6 billion, around 24.2%, on pre-booking services.

The increase in the number of vacations within Germany is mainly the result of a rise in short trips (with a maximum of four overnight stays), which have seen growth of 4.1%. In contrast, the number of long trips has increased by just 1.2%. Within domestic tourism, spontaneous trips have seen the most significant growth, with an absolute increase of 900,000 trips (6.5%). Spontaneous trips are those that do not require any professional organization: participants independently look for accommodation when they reach their destination, or stay with friends. The services of a travel agency or an online portal are not necessary for booking – which, in turn, has an effect on their sales.

In particular, those who usually like to travel to long-haul destinations discovered their home country as a travel destination in 2009. From a financial perspective, travel within Germany is more attractive in economically uncertain times. Ecological considerations were also a major factor for this target group.

37% of Germans stayed at home in 2009 and spent their vacation on the balcony or in the garden. This is 5% more than in 2006, the record year for travel: with an increase of 2% in 2009, the crisis year had a particularly strong effect.

The survey

With the GfK MobilityMonitor, GfK Panel Services Germany continuously monitors all journeys of over 50 kilometers, made with a form of transport for any purpose by people in private households, in a fixed, population-representative sample of 20,000 households net. The tool aims to survey mobility behavior, for all reasons and means of transport, and to monitor changes in the mobility behavior of individuals over time.

One segment of the GfK MobilityMonitor, which has been observed by GfK TravelScope for many years, gives a clearer picture of behavior on the vacation travel market. A special feature is that travel intentions, concrete



plans, bookings and trips taken can all be surveyed in the same investigation unit and sample.

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