

Global Travel Trends 2009

World Travel Monitor® (preliminary) results from IPK International for the
ITB Berlin Future Day, 3/10/2010

Global Travel Trends

European Travel Trends

German Travel Trends

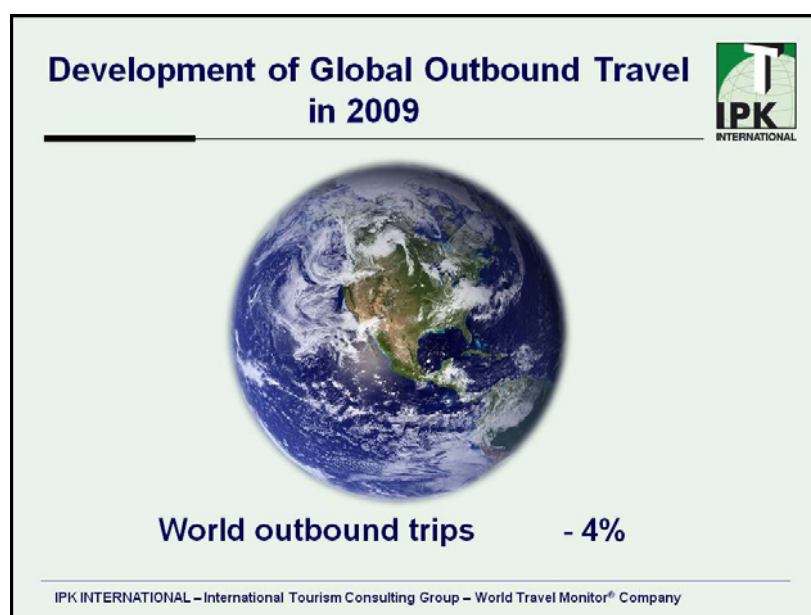
The results presented are based on IPK International's World Travel Monitor®, the world's sole and largest tourism study monitoring the pulse of international tourism. The World Travel Monitor® data derives from population-representative surveys taken in 60 countries. More than 500,000 interviews are conducted around the globe every year.

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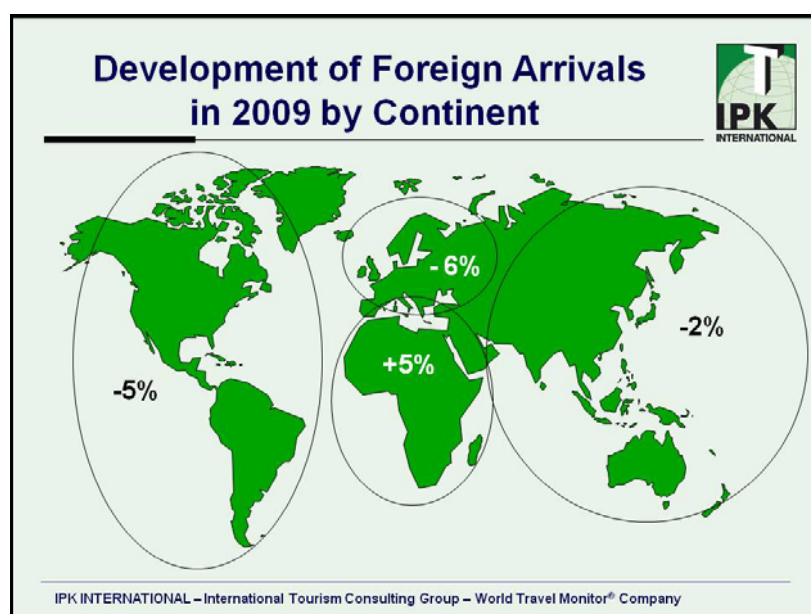
Tourism Research • Tourism Marketing • World Travel Monitor®

Global Travel Trends



For the first time since statistical data has been collected on international tourism, the year 2009 exhibited a decline in the number of outbound trips taken throughout the world – this global figure dropping by a total of - 4%.

The downturn can be primarily attributed to the global financial and economic crisis.



European and American overseas destinations were hit the hardest by this global decline; Europe by - 6% and America by - 5%.

Recording a - 2% decline, Asian destinations were somewhat less impacted.

Meanwhile, African destinations managed to post a plus figure of 5%, although based on a comparatively lower travel volume.

European Travel Trends



The Europeans took a total of 395 million outbound trips in 2009 – 6% fewer than in the previous year and accounting for 3.5 billion overnights, a -12% decline from the previous year.

Travel expenditures for outbound trips dropped - 13% in the year 2009 and amounted to 331 billion euro.



The European source market to record the far and away greatest decline in 2009 was Great Britain. All told, the British took 8 million outbound trips less than in the previous year.

Outbound trips fell by 3 million in the German market as well, and by 2.6 million in the Russian market.

Similarly, the Spaniards, Swedes and Dutch also went on considerably fewer outbound trips than in the previous year.



The "Tour" segment was the segment most strongly affected by the decrease in outbound travel (- 14%).

"Countryside holidays" fell off by 6%.

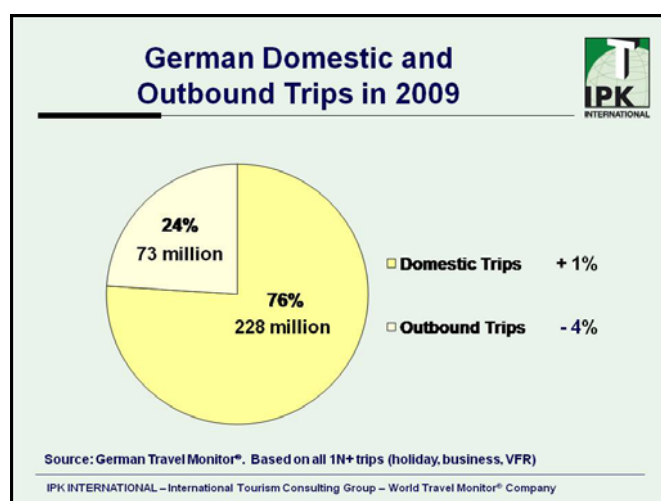
"CityBreaks" and Sun&Beach holidays were the most stable segments, each recording a percentage drop of 3%.

German Travel Trends



The Germans took 301 million trips in 2009 (domestic and outbound combined), amounting to a total of 1.5 billion overnights.

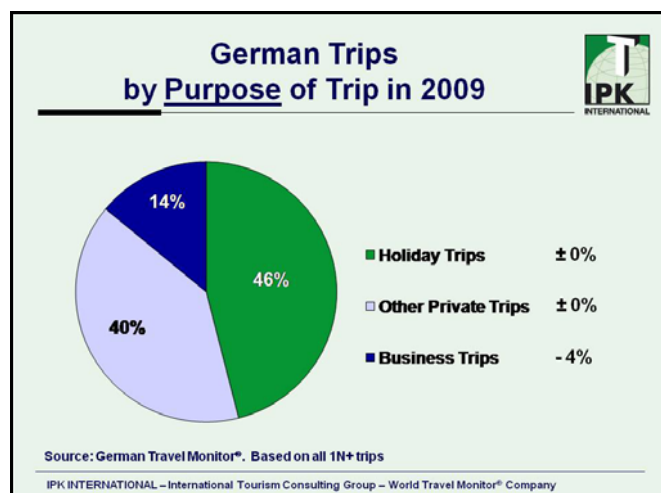
Compared to the year before, total travel volume fell by - 1%, overnight accommodation volume fell by - 3%, and travel expenditures by - 5%.



Of the 301 million trips the Germans took in 2009, 228 million were domestic and 73 million were outbound.

Compared to the previous year, this was a + 1% increase in domestic travel, while outbound trips declined by - 4%.

Nevertheless, Germany fared better in terms of outbound trips when compared to the entire European market as a whole.

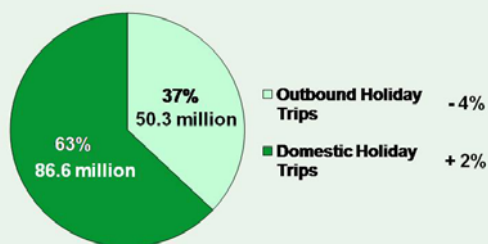


46% of the domestic and outbound German trips were holidays, an unchanged figure from the previous year.

The volume of other private trips also remained unchanged.

In contrast thereto, there was a 4% drop in German business trips; i.e. the decrease in the German market for 2009 can be wholly attributed to the business trip segment.

German Domestic and Outbound Holiday Trips in 2009



Source: German Travel Monitor®. Based on all 1N+ holiday trips

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In 2009, the Germans went on a total of 136.9 million holiday trips. Of these, 86.6 million were domestic trips and 50.3 million were outbound.

Compared to the year before, there was a + 2% increase in domestic holidays, while outbound holidays decreased - 4%.

The domestic holiday market share thereby rose from 62% to 63%.

Domestic Holiday Destinations in 2009



Rank	Destination	Trips (in millions)
1	Bavaria	17.5
2	Lower Saxony	9.3
3	Baden-Württemberg	8.3
4	North Rhine-Westphalia	7.3
5	Mecklenburg West.Pom.	7.0

Source: German Travel Monitor®. Based on all 1N+ domestic holiday trips

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Bavaria was again the most popular domestic holiday destination for the Germans in 2009, recording a total of 17.5 million holiday trips.

Lower Saxony came in a distant second (9.3 million domestic German holiday trips) followed by Baden-Württemberg in third place (8.3 million).

Outbound Holiday Destinations in 2009



Rank	Destination	Share
1	Spain	16%
2	Austria	16%
3	Italy	14%
4	Turkey	8%
5	France	5%
6	Netherlands	5%
7	Greece	4%

Source: German Travel Monitor®. Based on all 1N+ outbound holiday trips

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Spain and Austria share first place for leading German outbound holiday destinations of 2009, each recording a 16% share, followed by Italy (14%).

These three countries have been the Germans' undeniable outbound holiday destinations of choice for many years now.

IPK International is a leading and internationally operating consulting group specialized in tourism.

IPK's business sectors comprise:

Tourism Research

Conducting quantitative and qualitative tourism research – worldwide

Tourism Marketing

Development of strategies, marketing plans, destination marketing, prognoses and business development concepts on a regional, national and international level

Tourism Master Planning

Development of tourism resorts and regional as well as national master plans

World / European Travel Monitor®

The sole and largest tourism database worldwide providing surveyed volume and characteristics of outbound travel for nearly 60 European, American and Asian countries

World Travel Monitor® / European Travel Monitor®

The World / European Travel Monitor® is an annual survey monitoring the outbound travel volume and structure in all Western and Eastern European countries as well as in all the important American and Asian markets.

IPK International launched the World Travel Monitor® in 1988 based on the European Travel Monitor® – which today forms an integral part of the World Travel Monitor®.

Based on surveys representative of the population in 60 countries, more than 500,000 interviews are conducted every year. Besides holiday trips, business trips and other private trips are also included in the survey.

Today the World Travel Monitor® is the world's largest tourism database to provide comparable data on European, American and Asian outbound travel volume and behavior. The surveyed markets include:

European Markets

▪ Austria	▪ Finland	▪ Lithuania	▪ Slovakia
▪ Belarus	▪ France	▪ Montenegro	▪ Slovenia
▪ Belgium	▪ Germany	▪ Netherlands	▪ Spain
▪ Bosnia	▪ Great Britain	▪ Norway	▪ Sweden
▪ Bulgaria	▪ Greece	▪ Poland	▪ Switzerland
▪ Croatia	▪ Hungary	▪ Portugal	▪ Turkey
▪ Czech Republic	▪ Ireland	▪ Romania	▪ Ukraine
▪ Denmark	▪ Italy	▪ Russia	
▪ Estonia	▪ Latvia	▪ Serbia	

Other International Markets

▪ Argentina	▪ Hong Kong	▪ Morocco	▪ Taiwan
▪ Bahrain	▪ India	▪ Mexico	▪ Thailand
▪ Brazil	▪ Israel	▪ Paraguay	▪ United Arab Emirates
▪ Canada	▪ Japan	▪ Peru	▪ Uruguay
▪ China	▪ Kazakhstan	▪ Saudi Arabia	▪ USA
▪ Chile	▪ Kuwait	▪ Singapore	
▪ Colombia	▪ Malaysia	▪ South Korea	

World Travel Monitor® Content

▪ Number of outbound trips / market volume	▪ Means of transportation (incl. low fare)	▪ Length of trip
▪ Destination countries (worldwide)	▪ Airport of departure / airlines	▪ Travel expenditures
▪ Destination regions / cities	▪ Accommodation types / categories	▪ Trips with children
▪ Purpose of trip (holiday, business, other leisure)	▪ Travel season	▪ Regional focus markets
▪ Holiday segments (Sun&Beach, Tour, City, Mountain, Cruise, Winter Sports, Wellness, etc.)	▪ Booking behavior (booking sites / products, booking period)	▪ Target group / Traveler profiles (gender, age, education, income, children in household, size of household)
▪ Holiday motives / activities	▪ Internet usage	▪ Travel frequency
▪ Type of business trip	▪ Information sources	▪ Travel intensity

All World / European Travel Monitor® data is available as

- Outbound data (all trips abroad of a certain country)
- Inbound data (all trips to a specific country / destination)

The findings extracted from the World Travel Monitor® can be provided in tables with or without detailed analyses and recommendations.

The World Travel Monitor® is conducted as a multi-client study by IPK International. Principal clients include national tourist boards, ministries, tour operators, international hotel chains, advertising agencies, consultancies, and numerous other parties having an economic interest in the travel industry.

The latest World Travel Monitor® data (travel year 2009) is now available for immediate purchase.

Special Publications

Impact of the Economic Crisis on the 2010 European Travel Behavior

Based on population-representative surveys conducted in 18 European markets, IPK International has again analyzed the effects the financial and economic crisis might have this year on the travel behavior of the Europeans. The results of this study provide answers to questions such as:

- Will travel volume continue to decline this year or will the markets recover?
- Which markets exhibit the best recovery trend for travel year 2010?
- And in return, which markets will experience poor performance?
- Which target groups merit closer attention in 2010?
- What changes can be expected in the 2010 travel behavior compared to 2009 (e.g. shorter, closer, less expensive ...)?

The results of the study are presented for each country individually as well as Europe as a whole and include comparisons to the previous year. This study is now available for immediate release.

World Travel Monitor® Publications:

The following IPK International publications, based on the data of the European Travel Monitor®, are now also available for immediate release:

- ***European Business and MICE Travel***

An analysis of European business and MICE (Meeting/Incentive/Convention/Exhibition) travel. The specifics include market volumes for the source markets and destination countries, preferred types of accommodation, length of stay, booking behavior, spending behavior, target groups, etc.

- ***Asian Business and MICE Travel***

An analysis of Asian business and MICE (Meeting/Incentive/Convention/Exhibition) travel. The specifics include market volumes for the source markets and destination countries, preferred accommodation types, length of stay, booking behavior, spending behavior, target groups, etc.

- ***Europe's "Golden Generation" (55+) Travel***

This study analyzes the outbound trips taken by Europe's "Golden Generation" (55+ years old). The specifics include trip / market volume per source market, travel expenditures and preferred destinations, types of holidays and accommodation, means of transportation, etc.

Each of these three studies moreover includes a chapter containing the most important data on any given destination selected by the client.