

Global Travel Trends 2008

World Travel Monitor® Results (preliminary 2008 data) from IPK International
for the **ITB Berlin Message**, 03/11/2009

World Travel Trends

European Travel Trends

German Travel Trends

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

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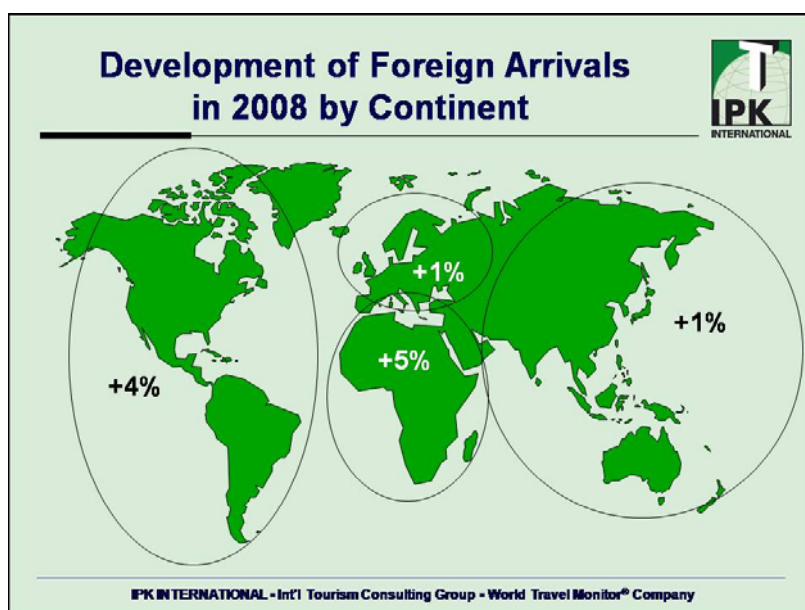
World Travel Trends



Outbound travel of the world's population rose +2% in 2008, thus at a weaker rate than the previous year (2007: +6%).

This slowdown was caused by the financial and economic crisis, leading to a decline in outbound trips, particularly in the last quarter of 2008.

Ultimately, however, the 2008 world's outbound trip volume balances positively at +2% – due in no small measure to the strong growth recorded in the first half of the year.



All continents still recorded positive year-end results in 2008, despite the doldrums in the second half of 2008.

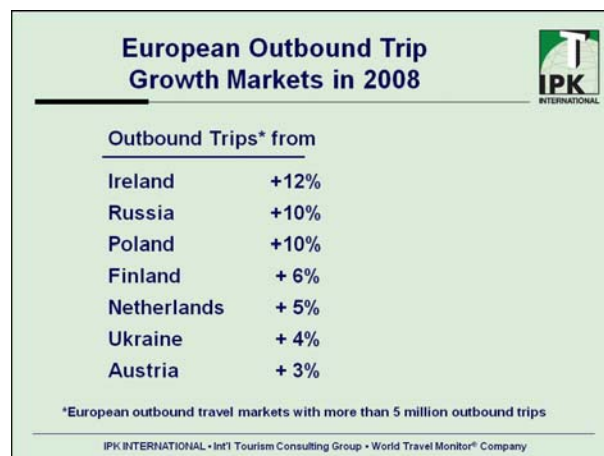
Foreign arrivals in Africa had the strongest percentage growth (+5%), followed by North and South America (+4%).

Conversely, European and Asian destinations, only recorded low growth: +1% each.

European Travel Trends

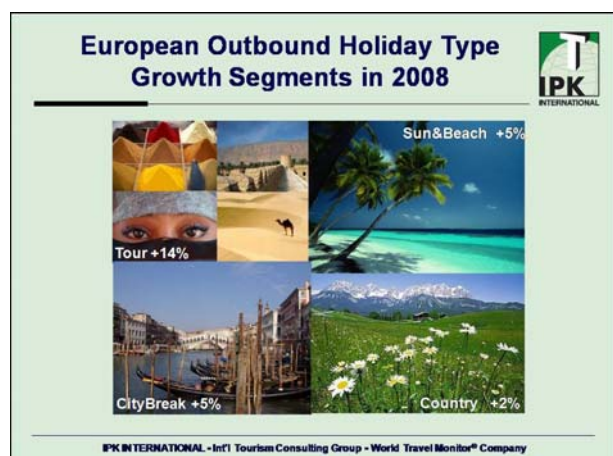


The Europeans took a total of 418 million outbound trips in 2008 (+2% compared to the previous year), thereby constituting 3.9 billion nights (±0%) spent abroad. Market turnover for outbound trips was at 396 billion Euro (+3%).



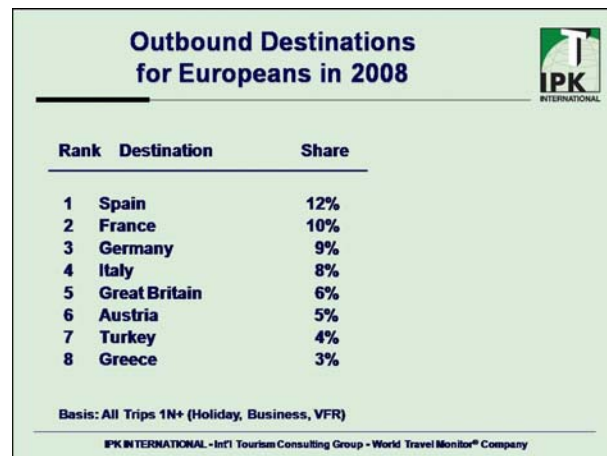
Europe's most dynamic source market in 2008 was Ireland at 12% more outbound trips, followed by Russia and Poland (+10% each).

Above-average growth was also recorded for the source markets of Finland (+6% more outbound trips), the Netherlands (+5%), Ukraine (+4%) and Austria (+3%).



With +14%, the "Tour" segment realized the strongest European-wide growth in 2008.

"Sun&Beach" and "CityBreak" holidays also recorded above-average growth of 5% each. "Countryside" holidays gained 2%.



With a market share of 12%, Spain remained the most popular outbound destination of the Europeans in 2008. France was the second-most popular destination, followed by Germany and Italy.

Taken together, these four destinations account for roughly 40% of all the trips taken by the Europeans.

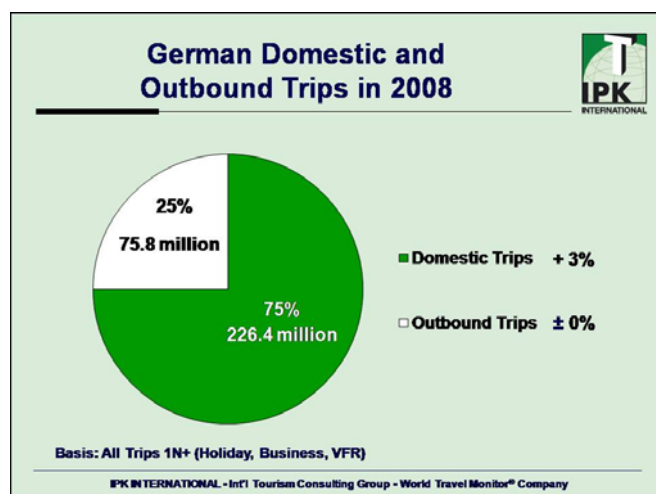
German Travel Trends



The Germans took a total of 302 million trips in 2008 (domestic and outbound), thereby constituting 1.6 billion nights spent abroad.

In comparison to the previous year, total travel volume thereby rose +2%, the overnight accommodation volume even +5%.

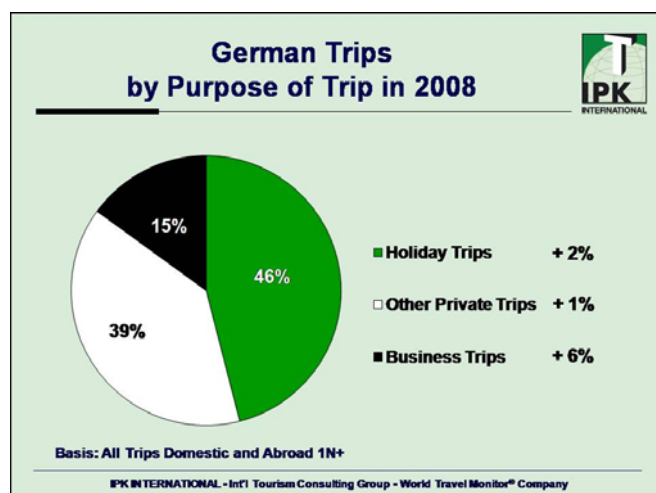
The domestic and outbound trips of the Germans yielded a total 2008 spending volume of 134 billion Euro (+6%).



In 2008, the Germans took 226.4 million domestic trips and 75.8 million outbound trips.

Compared to the previous year, domestic trips rose +3% while outbound travel nearly stagnated.

Both the German domestic trips (previous year: +4%) as well as especially the outbound trips (previous year: +2%) thereby recorded weaker growth in 2008 than the year before.

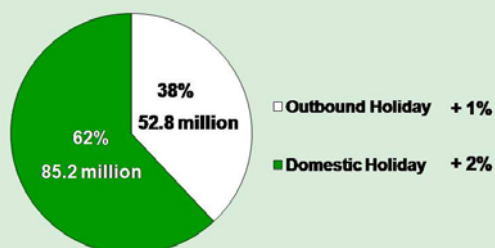


46% of the Germans' domestic and outbound trips were holidays, a +2% increase over the previous year.

The other private trips (at a market share of 39%) rose +1%.

At an increase of 6%, however, business trips realized the by far strongest growth.

German Domestic and Outbound Holiday in 2008



Basis: All Holiday Trips 1N+

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The Germans went on a total of 138 million holiday trips in 2008. Of this number, 85.2 million were domestic trips and 52.8 million were outbound.

In comparison to the previous year, domestic holidays increased +2% and outbound holidays +1%. The market share of domestic trips increased to 62%.

Main Outbound Holiday Destinations for Germans in 2008



Rank	Destination	Share
1	Spain	17%
2	Austria	15%
3	Italy	14%
4	Turkey	8%
5	France	6%
6	Netherlands	4%
7	Greece	4%
8	Switzerland	4%

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Commanding a market share of 17%, Spain was again the leading outbound holiday destination of the Germans in 2008, followed by Austria (15%) and Italy (14%).

For years now, these three countries have been the clear favorite outbound holiday destinations of the Germans – invariably far ahead of the rest.

Main Domestic Holiday Destinations for Germans in 2008



Rank	Destination	Share
1	Bavaria	20%
2	Lower Saxony	11%
3	Baden-Wuerttemberg	10%
4	North Rhine-Westphalia	9%
5	Mecklenburg West.Pom.	8%
6	Schleswig-Holstein	7%
7	Berlin	7%
8	Saxony	7%

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Among the domestic destinations, Bavaria was again the undisputed market leader in 2008 (with a market share of 20% of all domestic German holidays).

The second-most popular holiday destination was Lower Saxony, followed by third-ranked Baden-Württemberg.

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

IPK's business sectors are:

Tourism Research

Conducting quantitative and qualitative tourism research - worldwide

Tourism Marketing

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

Tourism Masterplanning

Development of regional and national Masterplans, tourism resorts.

World / European Travel Monitor®

The sole and largest tourism database worldwide providing the volume and characteristics of outbound trips for nearly 60 European and overseas countries.

World Travel Monitor® / European Travel Monitor®

The World / European Travel Monitor® is an annual survey monitoring the outbound travel volume and travel behavior in all Western and Eastern European countries as well as in 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 nearly 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 (covering the total market).

Today the World Travel Monitor® is the world's largest tourism database to provide comparable data on the European, American and Asian outbound travel volume and travel behavior. The surveyed countries 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	▪ Malaysia	▪ South Korea
▪ Bahrain	▪ India	▪ Morocco	▪ Taiwan
▪ Brazil	▪ Israel	▪ Mexico	▪ Thailand
▪ Canada	▪ Japan	▪ Peru	▪ United Arab Emirates
▪ China	▪ Kazakhstan	▪ Saudi Arabia	▪ Uruguay
▪ Chile	▪ Kuwait	▪ Singapore	▪ USA

World Travel Monitor® Content

<ul style="list-style-type: none"> ▪ Number of outbound trips / market volume ▪ Destination countries (worldwide) ▪ Destination regions / cities ▪ Purpose of trip (holiday, business, other leisure) ▪ Holiday segments (Sun&Beach, Tour, City, Mountain, Countryside, Snow, Cruise, Spa, etc.) ▪ Holiday motives / activities ▪ Type of business trip 	<ul style="list-style-type: none"> ▪ Length of trip ▪ Means of transportation (incl. low fare) ▪ Airport of departure / airline ▪ Accommodation types / categories ▪ Booking behavior (booking sites / - products, booking period) ▪ Travel season ▪ Internet usage 	<ul style="list-style-type: none"> ▪ Information sources ▪ Travel expenditures ▪ Trips with children ▪ Regional focus markets ▪ Target group / traveler profiles (gender, age, education, income, children in household, size of household) ▪ Travel frequency ▪ Travel intensity
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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 the form of standard tables or customized data packages and/or together with detailed analyses and recommendations.

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

Special Publications

Impact of the Economic Crisis On the 2009 European Travel Behavior

Based on population-representative surveys conducted in 14 European markets, IPK International has analyzed the potential effects the current financial and economic crisis could have on the travel behavior of the Europeans. The results of this January 2009 study provide clear answers to questions such as:

- Which European markets are particularly crisis-sensitive and which are crisis-resistant?
- How are the individual target groups reacting to the crisis?
- How high is the percentage of crisis-contingent non-travelers in the individual markets?
- What other effects might the crisis have on travel behavior?

The results of the study are presented for each country individually as well as Europe as a whole.

European Travel Monitor® Publications:

The following IPK International publications, based on the data of the European Travel Monitor®, are available:

- ***Information and Booking Behavior of the Europeans***

This study analyzes the information and booking behavior of the European outbound travelers. Among the specifics detailed are the booking sites utilized (online/travel agencies, etc.), the types of products booked, booking time frames, the information sources drawn on, etc.

- ***European Business and MICE Trips***

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

- ***European Youth Trips***

This study analyzes the outbound travel taken by Europe's youth segment (15-29 years). Detailed data is provided on travel volume / market size per source market, travel expenditures and preferred destinations, the various types of holidays, accommodations and modes 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.

Outbound / Inbound Travel Monitor Reports 2009

Based on the latest World / European Travel Monitor® data, IPK International compiles special

- Outbound Reports for each of the nearly 60 source markets worldwide
- Inbound Reports for more than 100 destinations worldwide

These special Outbound and Inbound Reports give a complete overview of the international travel volume and travel behavior of the respective source markets and destinations.

Please contact us for further information on the above studies:
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