

# Evaluation October 2010

## for fvw

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## Summer 2010 and Tourist Year 2009/2010 Hit New Record High in the Sales

**Nuremberg, 10 November 2010 – After the tourist year 2009/2010 is finished in terms of bookings at the end of October, so is the summer season – and repercussions from the economic crisis in the business are gone forever: The year of tourism ends with a 3% turnover plus in stationary travel distribution in Germany, and the summer season achieved an even 7% increase.**

The good annual result for tourism is reduced a little by the losses of last year's winter season 2009/2010 (-5.7 percent), but the summer season 2010 has more weight due to healthy turnover figures. In the travel months from April to October 2010, travel agencies in Germany generated 7 percent more turnover on average, which more than compensated for the losses incurred in last year's summer season (-3 percent). Since the beginnings of the GfK Tourism Distribution Panel, there was indeed no summer season that yielded higher turnover rates than in the current year. It surpasses by 4 percent even the summer season 2008.

GfK Retail and Technology

October 2010

Travel Insights

Jan 09-Oct 10 vs. prev.y.  
Booked Jan 08-Oct 09

Travel Months in Summer 10

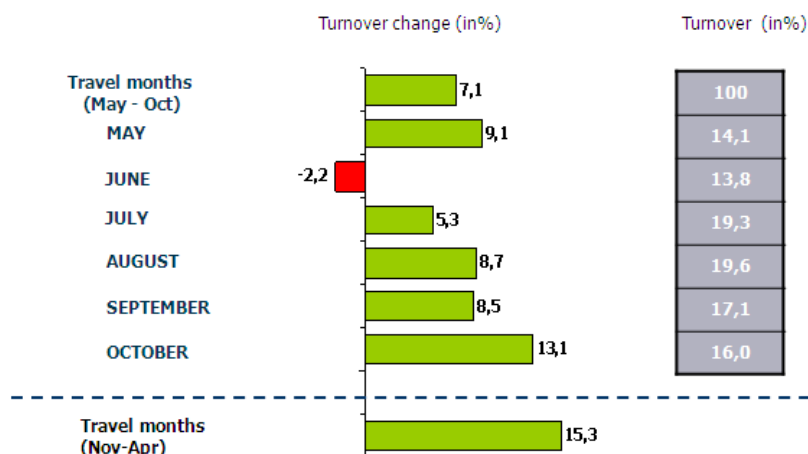
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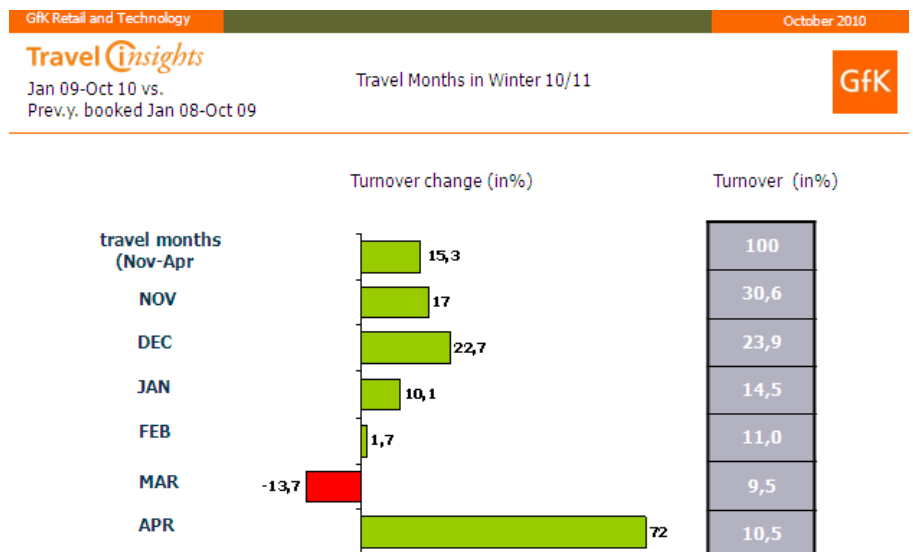
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And in total turnover, the tourism year 2009/2010 exceeds all preceding years hitherto.

Simultaneously with the starting shot into the winter season 2010/2011, booking turnovers for the winter holidays have wiped out the losses of the previous year: While the sales level for winter had dropped to 13.5 percent at the end of October a year ago, the present growth rate of 15.3 percent allows to infer that the winter season will probably recover. Even more so when we consider that the winter balance is slightly improving from month to month. In October 2010, travel shops generated almost 16 percent more turnover for winter, so the cumulated result is 0.3 percentage points above the previous month. The travel months January-March 2011 saw especially high increases in October. Thus, the booking trend follows a course that is widely different from the days prior to the economic crisis: There, the winter seasons used to register high increases upon the start of the booking season, which were flattened out in the course of time.



Just approximately 10 percent in whole turnover of the booking month October 2010 were generated by shortly decided holidaymakers who booked and traveled in the same month. Winter tourists accounted for 57.6 percent, which is a little less than in the two previous years. The summer season of next year is much on the way: Almost one-third (31.9 percent) in all booking turnovers of October was assigned for a holiday in summer 2011.

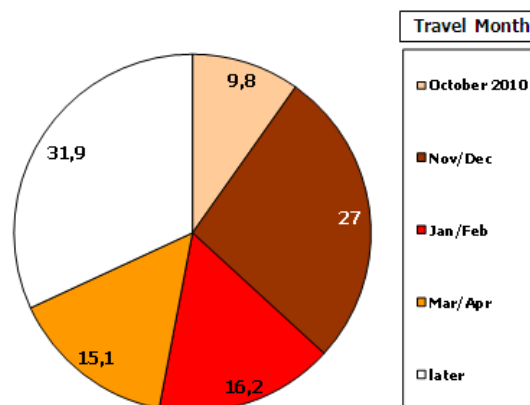
**Legend:**

Chart 1 shows all cumulated bookings until the end of October 2010 which cover the summer season 2010 in comparison with the previous year.

Booking registrations for travel in the winter season 2010/2011 are analyzed in chart 2.

Chart 3 shows all booking entries of October per travel month from October 2010 to April 2011 and later.

Booking registrations are the basis for turnover evaluation in all three cases.

**GfK Travel Insights**

Evaluations by Travel Insights, GfK's Tourism Distribution Panel, are based on booking data from approximately 1,200 travel agencies, which convey a representative picture of the stationary distribution in Germany. A constant sample of 340,000 booking entries at average is fed into GfK's systems every month and projected to the total market with utmost accuracy. Hence, evaluations of the Tourism Distribution Panel of GfK allow plausible conclusions on the booking habits of German tourists.

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