



Press Release

Datum
24. Januar 2012

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GfK Travel Insights Starts to Analyse Online Booking for Travel in Germany

Nuremberg, 24 January 2012 – After the inclusion of online platforms in its tourism distribution panel, GfK has now enhanced its market research competence in the field of tourism and is the first to offer holiday bookings via travel portals as a solid basis for exact data evaluation.

Participants in this new online panel of GfK Travel Insights are over 30 online travel platforms including some of the largest in this industry. Every week, their booking data flow into GfK's processing systems, where they are anonymized, such as to enable the constant tracking of market developments. The panel participants represent approximately 60 percent of the total turnover which is generated by travel operators in Germany in online commerce via travel portals. After a construction period of almost one year, the new panel can draw on booking records that reach back into early 2010. So it is even possible now to view the current winter season 2011-2012, resp. the upcoming summer season of 2012, in comparison with their counterparts of the previous year. "Up to now, information on the online travel sales business depended primarily on freely given figures from portal providers, polls and counts by business experts. The new Online Panel provides facts from the online sales business in Germany for the first time – unrestricted and in-depth", explains Dörte Nordbeck, product manager at GfK Travel Insights.

Clearer Signs from the Online Market

Moreover, GfK Travel Insights has observed bookings in stationary sales in tourism since 2005. So trends in the tourist market can be reviewed in both distribution channels: stationary and online.

Unlike stationary sales at traditional travel shops, the online segment stands out definitely more clearly: The three top holiday countries in online bookings, Spain, Turkey and Greece, accumulate a turnover share of 62 percent vs. summer 2011. In the travel shop channel, their share is definitely less accentuated, reaching just 50 percent.

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Booking turnovers that accumulated until the end of December 2011 for the ongoing winter season convey a similar picture: The Canary Islands, Egypt and Turkey together cover 54 percent, while these popular winter holiday countries gain only 34 percent of the total turnover in the travel agency sales. Long distance travel, in contrast, are of higher importance in the stationary sales: More than one-third (36 percent) at present in terms of turnover in travel agencies, but only a quarter (or 24 percent) in the online sales business.

Travel agencies Register Steeper Growth Rates

The demand in terms of bookings of holidaymakers in Germany shows a very positive trends in both distribution channels in tourism. While growth rates are about the same in in operator bookings, however, the overall review shows that growth in the stationary sales is faster to a small extent: At the end of December 2011 in terms of bookings, travel agencies generated 12 percent more for the ongoing winter season than a year earlier (and online +7%). Bookings for the next summer season are presently 16 percent more in terms of turnover, while online portals have gained 14 percent. Different focuses in the core business explain the growth rates in the stationary and the online distribution of travel: travel agencies for example gain an over-proportionately high growth rate by means of cruises, which play only a secondary role in online distribution.

The travel countries Spain and Turkey, that enjoy a vivid demand among German holiday-makers, register higher growth rates in the online distribution of travel at present. Egypt, usually one of the best selling winter destinations, is even slightly positive, while booking turnovers in travel agencies have fallen 27% beneath the previous year.

Prospects of GfK's Online Panel

For the next stage of the implementation of its Online Panel, GfK Travel Insights plan to include online turnovers generated in stationary travel commerce. In a third stage, it is planned to enhance it further by online direct sales via travel operators.

See GfK at the ITB

GfK will hold a press conference on this year's ITB in Berlin on Thursday, 8 March 2012 at 14:30, room 17/18 in the ICC Berlin. As the number of seats is restricted, we would be grateful to receive an email reservation to gfk_travelinsights@net-divine.de.

The Methodology

GfK Travel Insights is the trade panel research department that deals with tourism withing GfK Retail and Technology GmbH. Here, the basis of the data are the sales data (from travel bookings) in tourism.



The stationary distribution of travel supplies data from bookings at approximately 1,200 representative travel agencies throughout Germany. They provide a permanent sample of around 340,000 booking acts which are sent to GfK Retail and Technology in monthly intervals. After an extrapolation to the universe, the whole market, the evaluations made by GfK Travel Insights allow reliable conclusions on the booking and travel habits of German holidaymakers. Trends and developments in the market of tourism can be observed without major delays.

The new panel for online distribution includes the booking entries from approximately 30 online travel portals in Germany, which represent around 60 percent of the whole turnover generated by travel operators. The booking data from online sales are not extrapolated. After online travel portals, it is also planned to include step by step the online bookings of travel agencies and online direct sales of travel operators.

Actual evaluations draw on the booking data from stationary and online travel distribution from January 2010 until December 2011. Statements on the current winter season 2011/2012 with the travel months until April 2012 and the summer season 2012 (travel months: May until October 2012) as of bookings by end of December 2011 are punctual spotlights.

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About GfK

GfK is one of the biggest market research companies worldwide with 11,000 employees staff, who explore how people live, think and consume. For this, GfK draws on permanent innovation and intelligent solutions. GfK is present in over 100 countries to provide the know-how necessary to understand those who are of top importance: its clients. In the year 2010, GfK's turnover totalled €1,29 billion.

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