

Evaluation June 2010

for fwv

Staying at Home to Watch the World Cup

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Nuremberg 7 July 2010. The booking peak is still lingering in spite of the Soccer World Cup and the fine summer weather outside. Compared with the months before, the growth decelerates a little in June however, as it is only 4 %, which reduces the average increase rate of the whole summer season 2010 by 0.2 percentage points to now + 5.7 percent.

In terms of departures, June improves slightly on the previous month thanks to last minute bookings, yet turnovers are 2.3 percent less than last year. The Soccer World Cup is probably a reason why the inhabitants of Germany seem to go on travel more hesitantly, but the decrease is not dramatic anyway. After all, June is evidently the only month without a turnover increase in this summer season. According to current booking level, the rest of the travel months from July until October register increases in turnover between five and eleven percent, and despite minor losses that emerge in a month-by-month comparison.

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Booked:
Jan 09-May 10 vs.
prev.y. Jan 08-May 09

GfK Travel Insights
Travel Months Summer '10



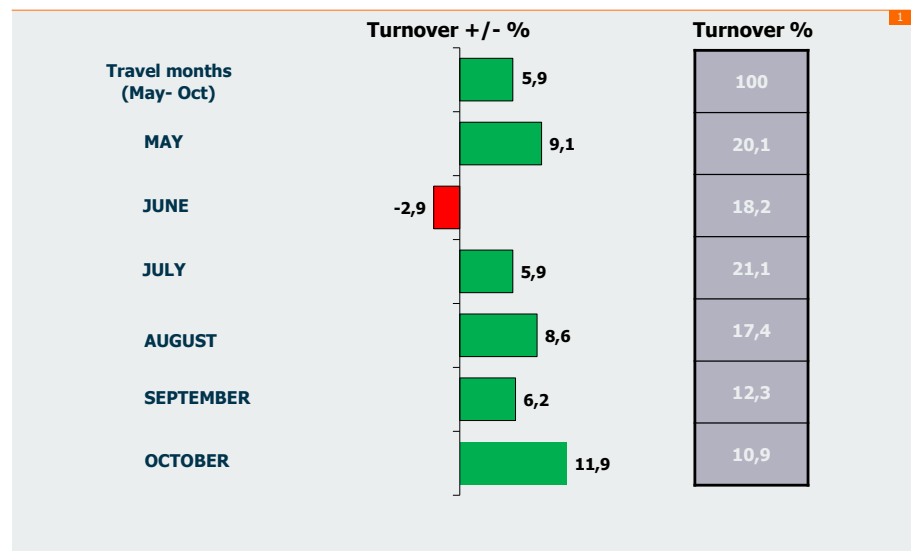
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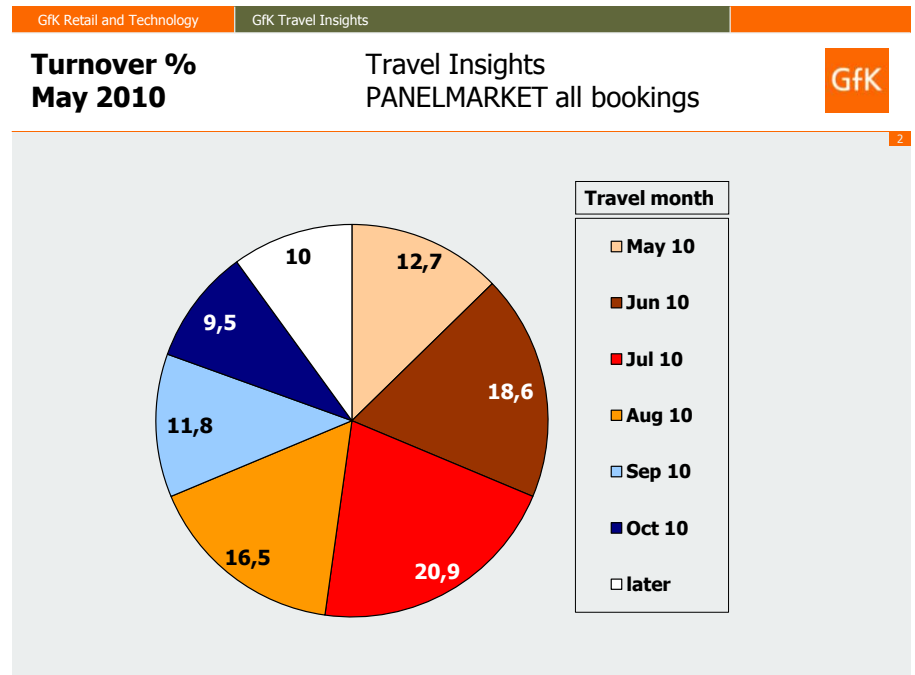
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In the booking month June, the number of shortly-decided holiday makers dropped perceptibly versus June last year: 37.2 percent in total turnover were generated by travel customers who wished to leave in the same month or in July. June last year has been explicitly strong in last minute bookings, thus the decline is steep, by 2.7 percentage points.

Travel bookings in June are characterized in particular by a remarkable share of early bookers: 19.3 percent in total turnovers that were generated at travel shops are for the next winter season 2010-2011. This means 4.6 points more in percentage than in June 2009, a month where the overall trend to early booking was low. Versus June 2008, there is still a growth of 1.4 percentage points.



Legend:

Chart 1 compares travel bookings entered until June 2010 and travel turnovers generated for the summer season 2010 with similar periods in the previous year. Evaluations are based on booking entries in terms of turnover.

Chart 2 shows all booking entries of June 2010 for June through October and later. Here, too, evaluations are based on booking entries in terms of turnover.



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. Latest trends and developments in the market of tourism can be tracked on a short-term basis.

For more information view www.gfk.com/tourism

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