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Travel *insights*

ITB Future Day Congress
Closer, Shorter, Cheaper:
How Sustainable is this Trend?

Method

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- **Covered countries and start of reporting:**

- UK May 2005
- Germany June 2005
- Italy January 2005
- France June 2009
- NL January 2008
- Russia January 2009
- Scandinavia scheduled 2010

- **Source of information:**

- Bookings from travel agencies (leisure trips)
- Touroperators (for UK and Russia)

- **Sample Size:** ~ 7.500 Travel Agencies

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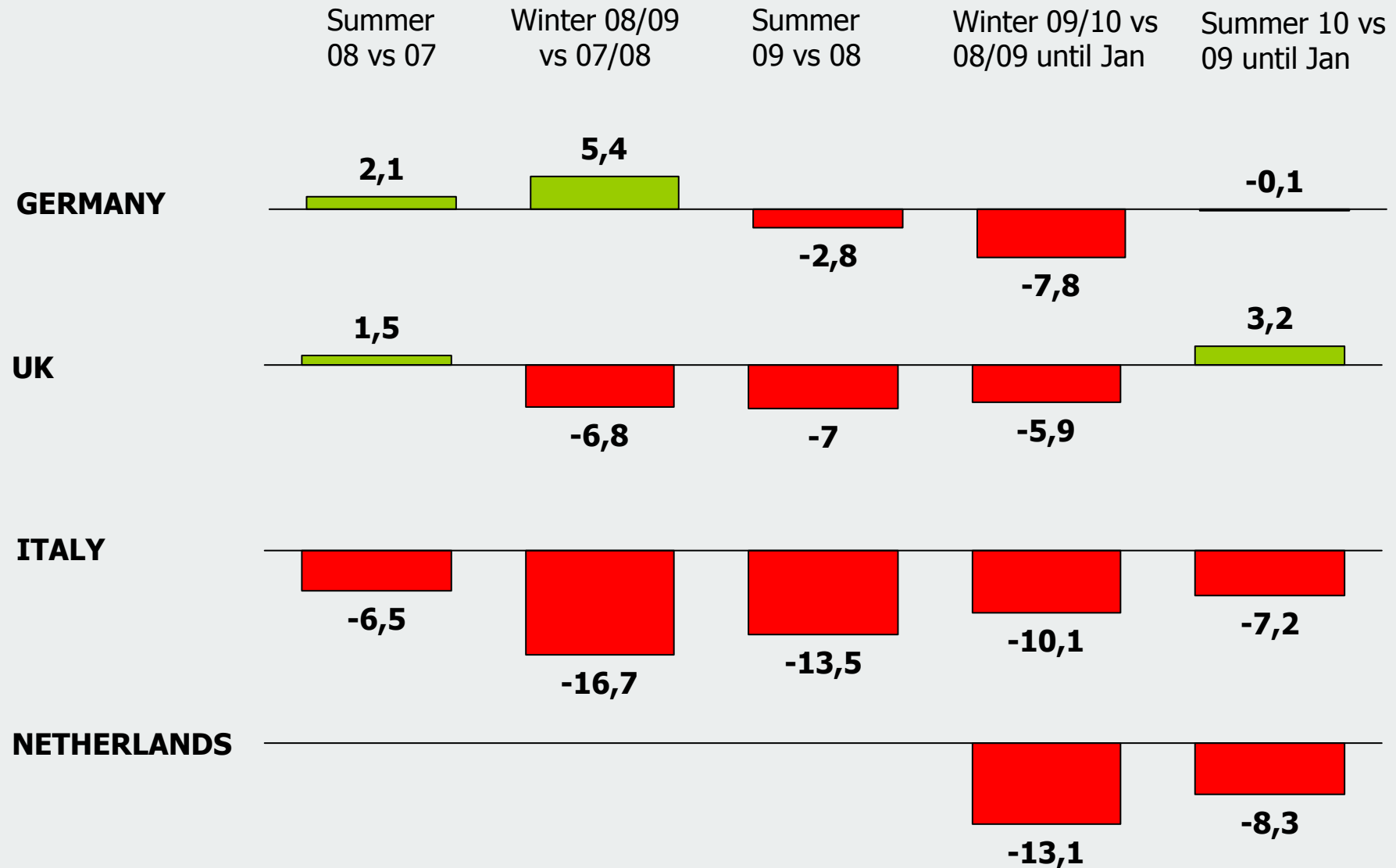
Sales Value +/- %

Last 3 Seasons and current Year

Growthrates per Country



3



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Sales Value +/- %

Winter and Summer Season

Growthrates per Booking Months

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Winter 09/10 vs. 08/09

	Total		May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
DE	-8				-31	-31	-3	0	0	1	3
UK	-6		-14	-13	-10	1	4	2	14	8	3

Summer 10 vs. 09

	Total		May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
DE	0							-3	-11	3	2
UK	3		-56	-14	23	12	-1	11	21	22	8

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Sales Value +/- %

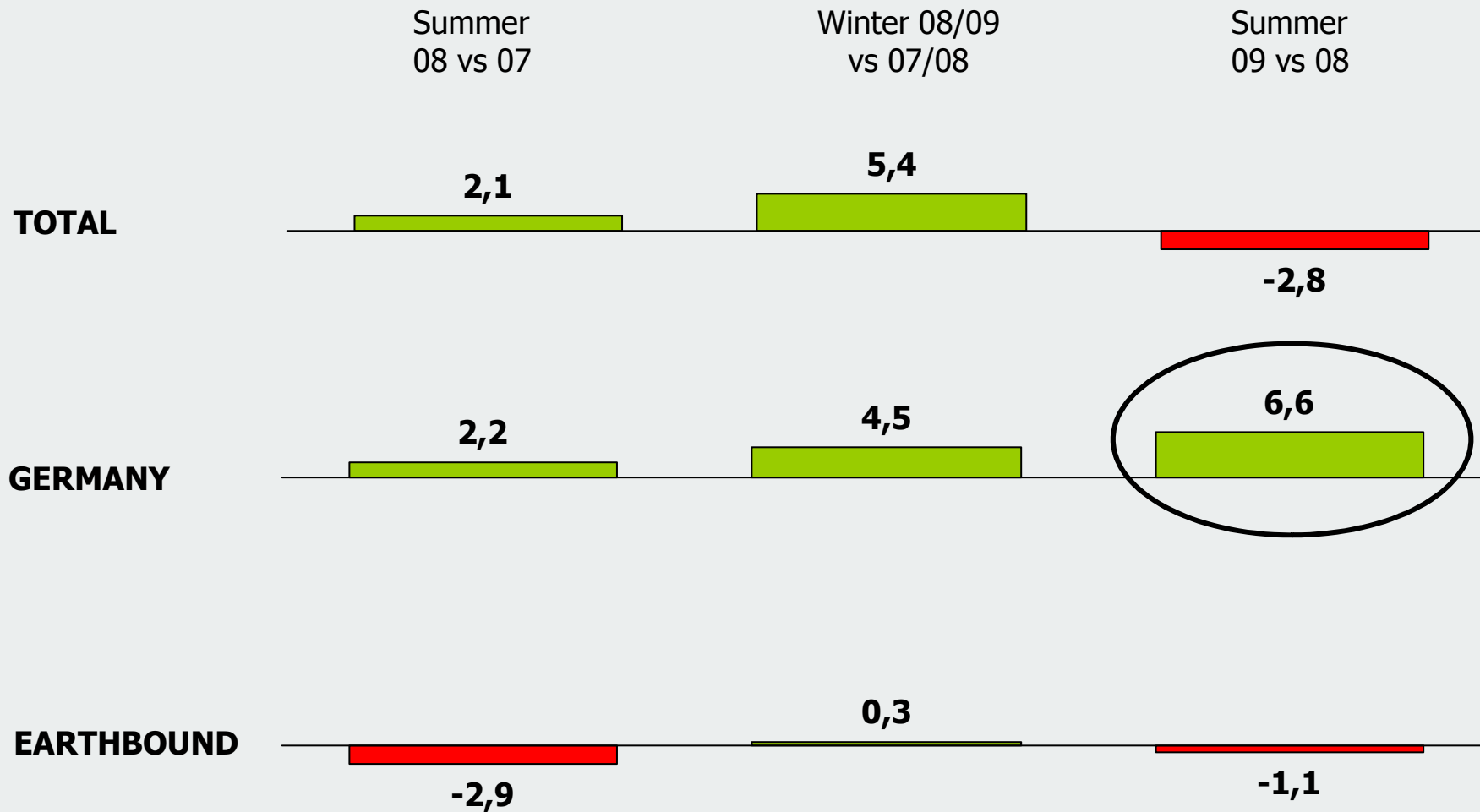
Last 3 Seasons

Growthrates Earthbound Destinations

Germany

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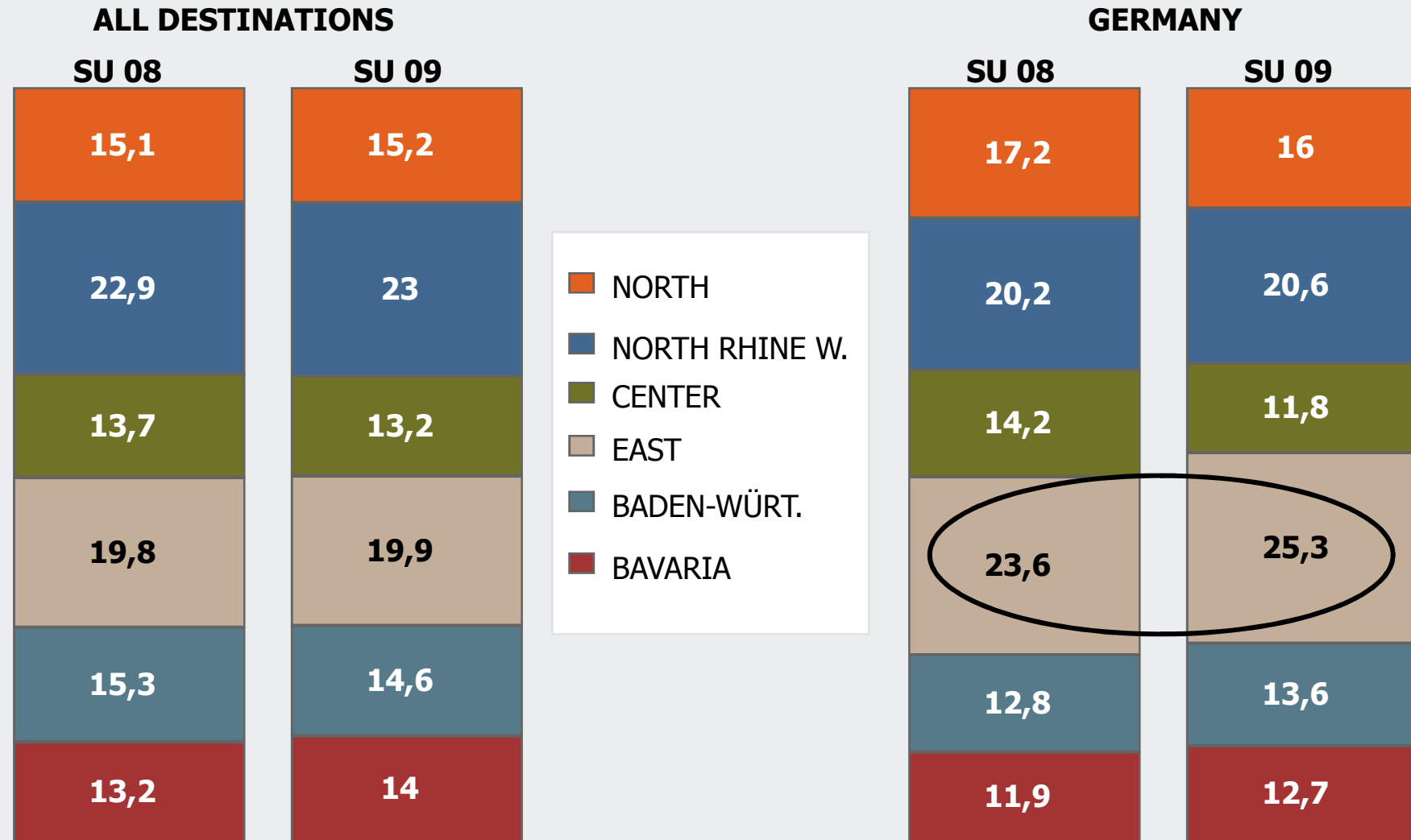
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Sales Value %

Summer Season 09 vs. 08

Development by German Source Regions

Germany



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Sales Value +/- %

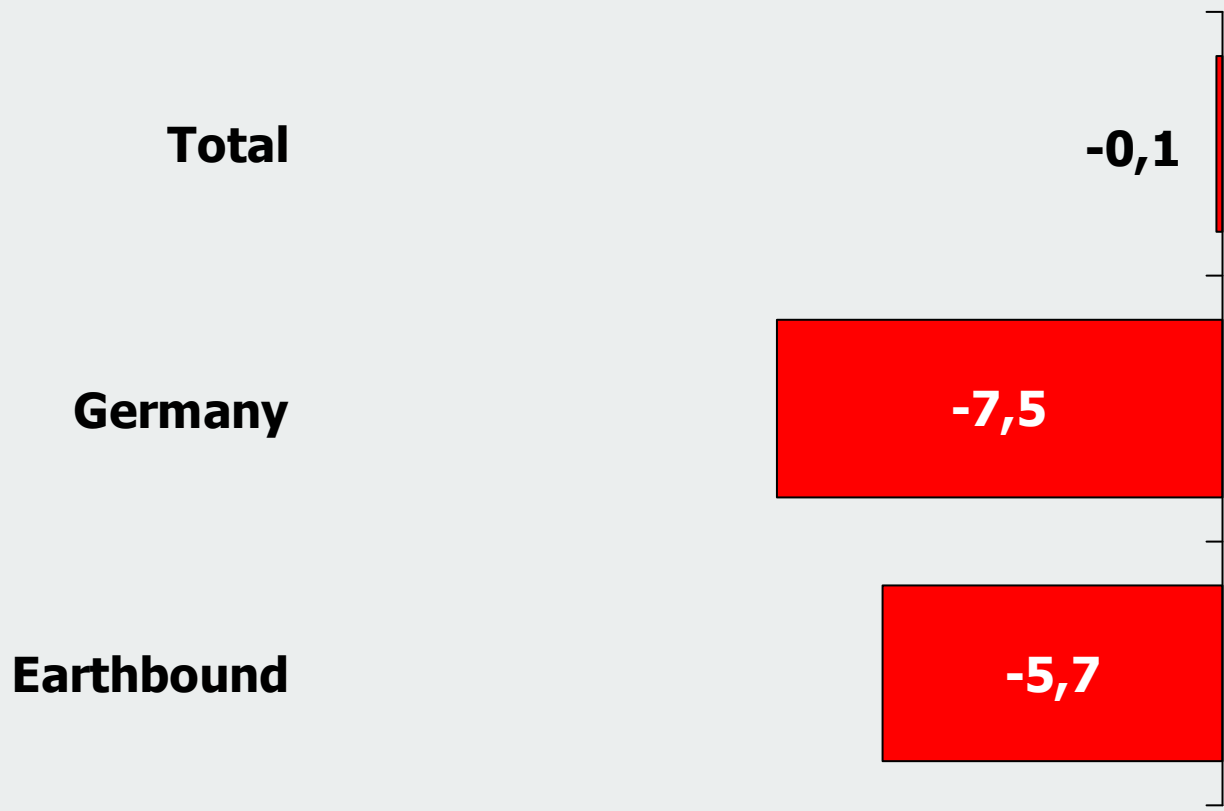
Current Summer Season

Growthrates Earthbound Destinations

Germany



Summer 10 vs 09
booked until Jan



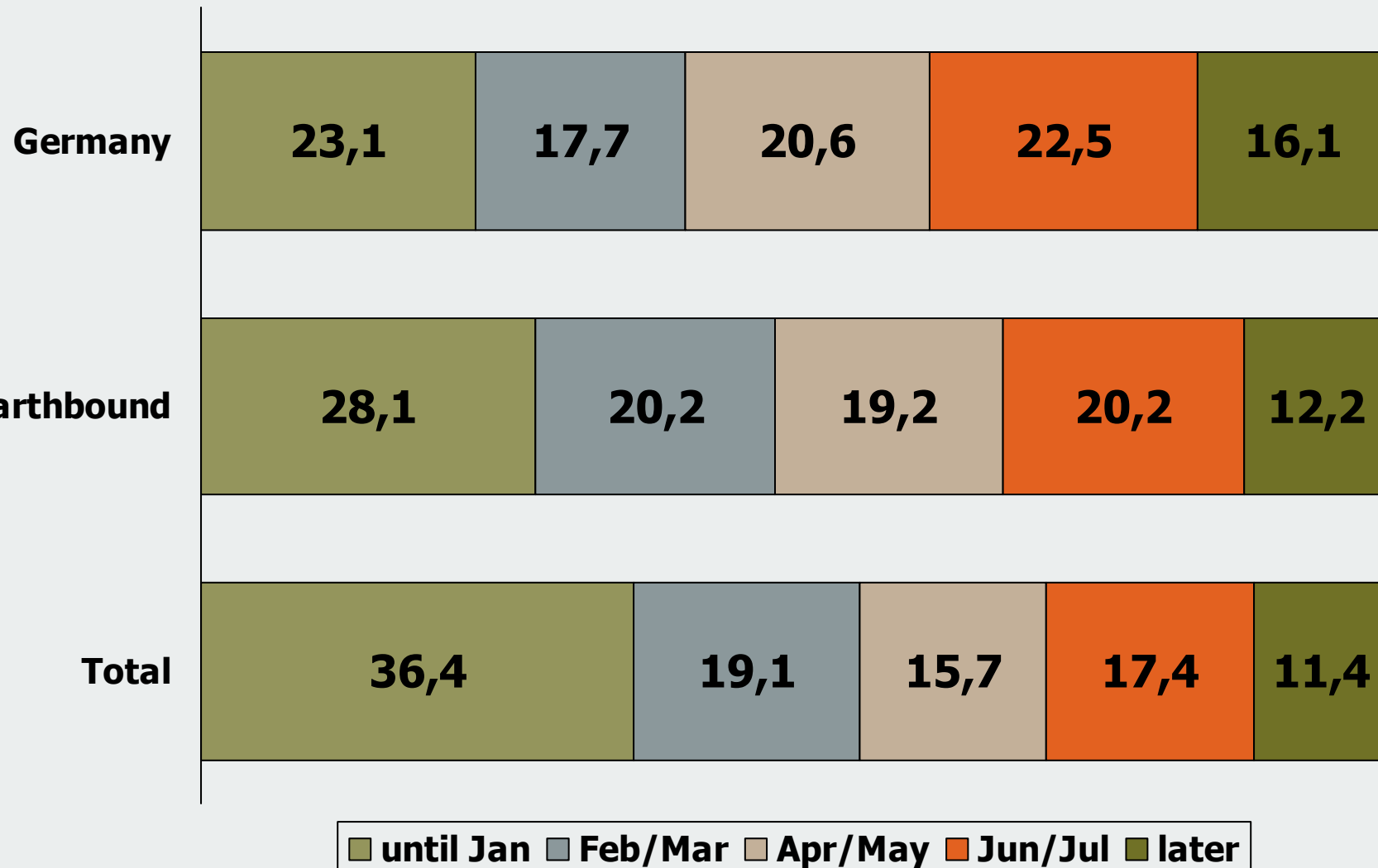
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Sales Value %
Summer 2009

Shares of Booking Months per Destination Germany



8



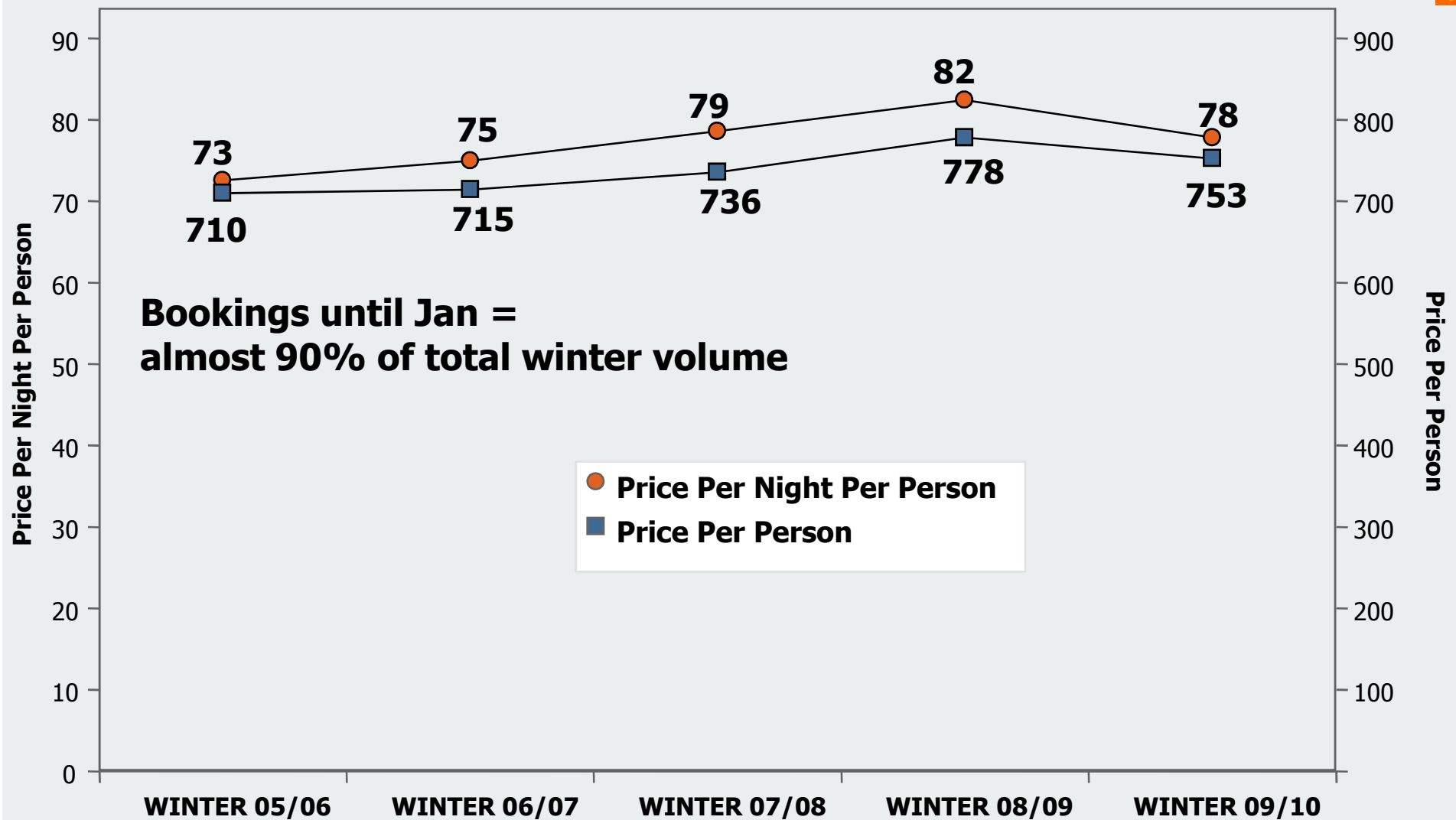
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Price (per Night) per Person %

Last 5 Winter Seasons booked until Jan

Price Development Touroperators bookings

Germany



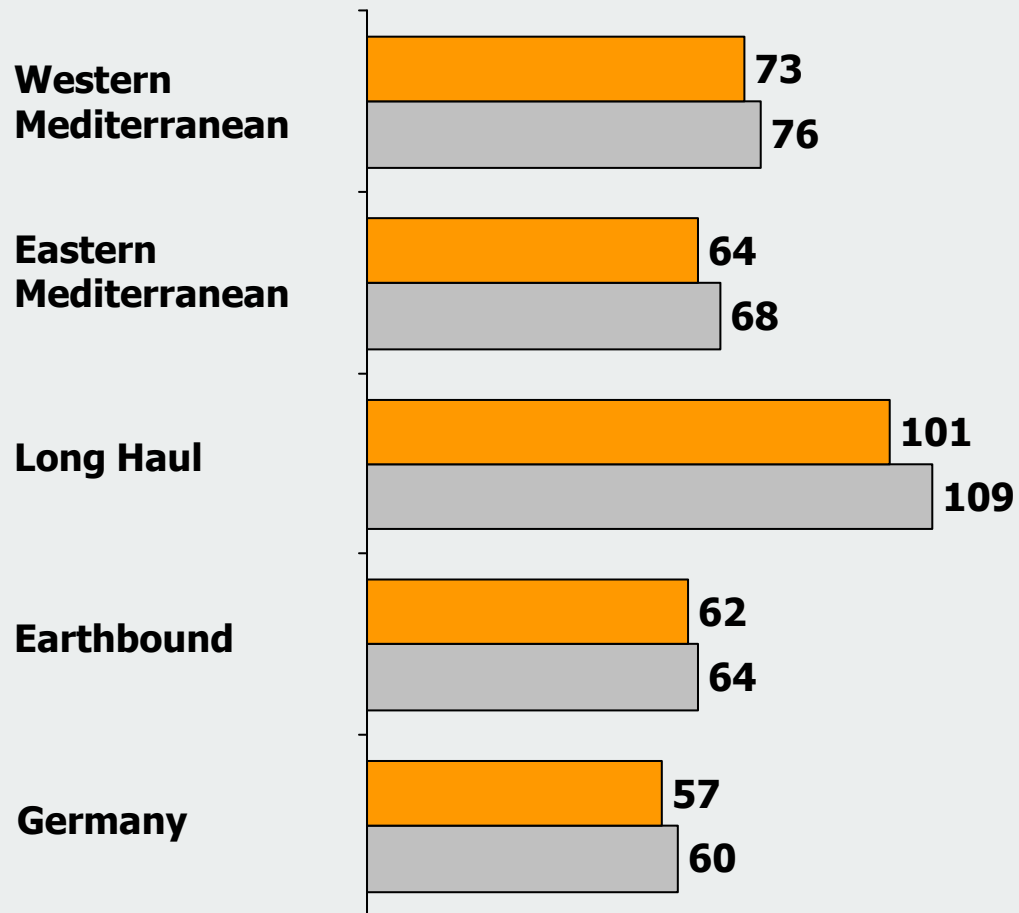
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Price per Person(per Night)
Winter 09/10 vs. 08/09 until Jan

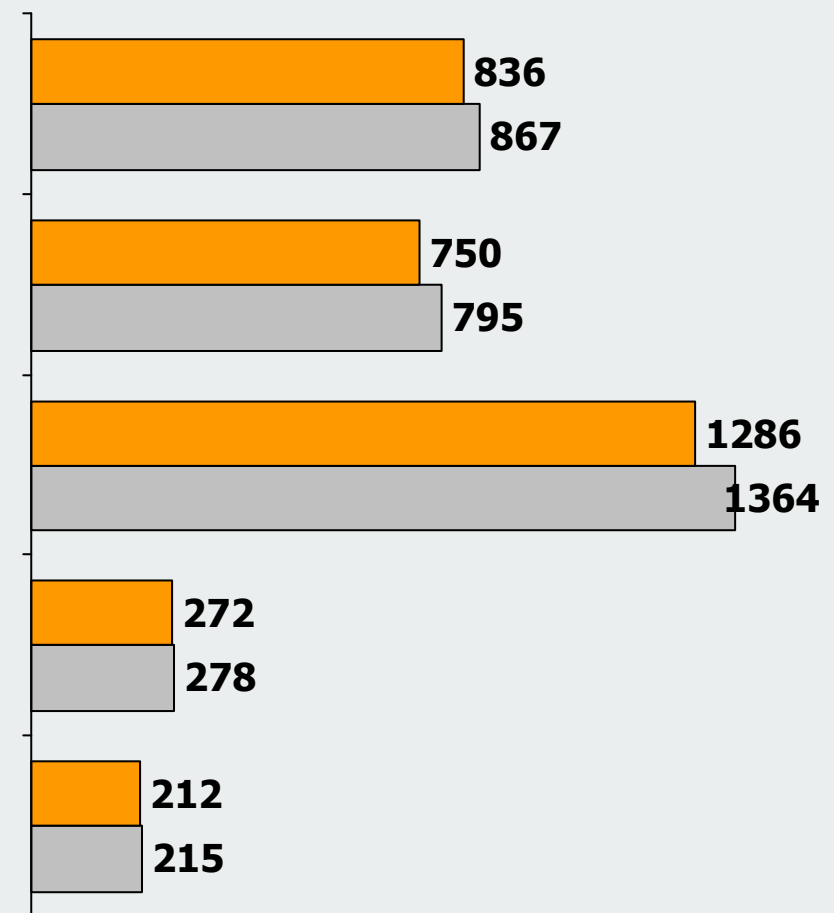
Destination groups Touroperator bookings Germany

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Price per Person per Night



Price per Person



□ previous Year ■ current Year

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Sales Value %

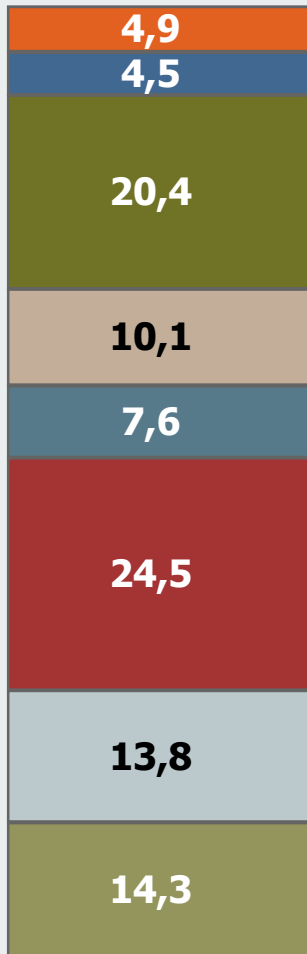
Current Winter and Summer season until Jan

Duration by Season Germany



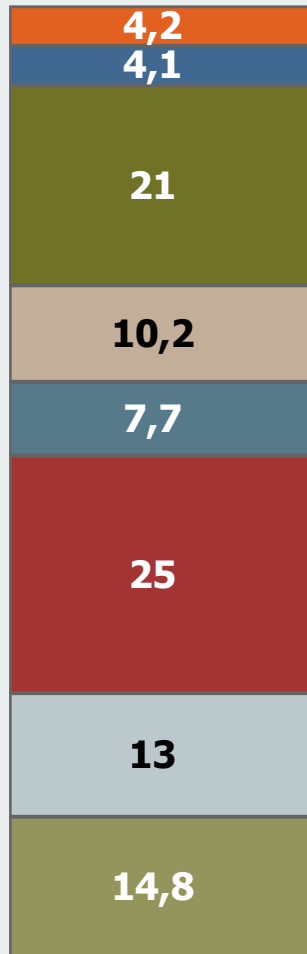
WINTER 08/09

14,4



WINTER 09/10

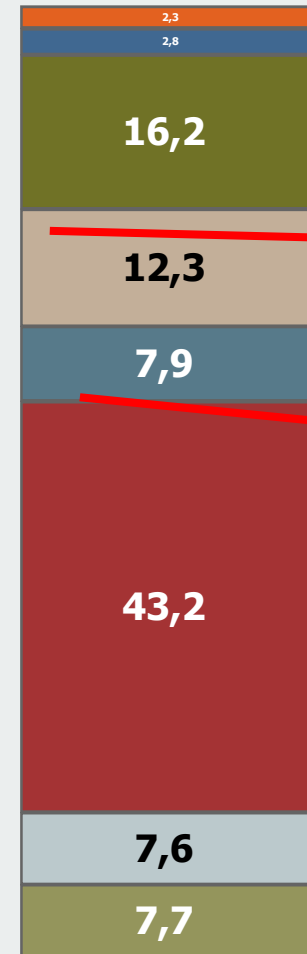
15,1



Avg. No. of nights

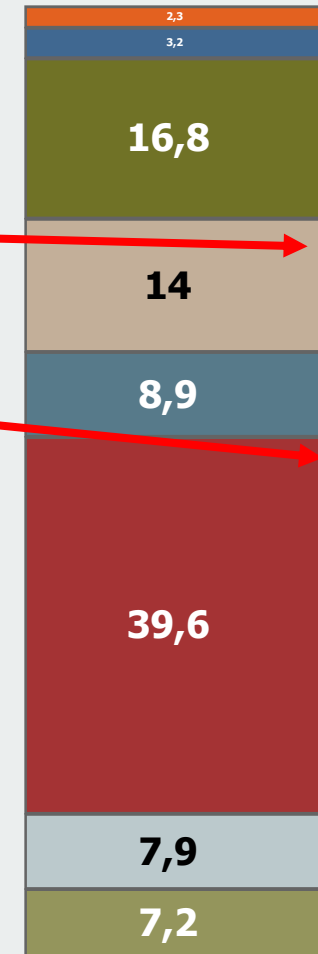
SOMMER 09

11,4



SOMMER 10

11,1

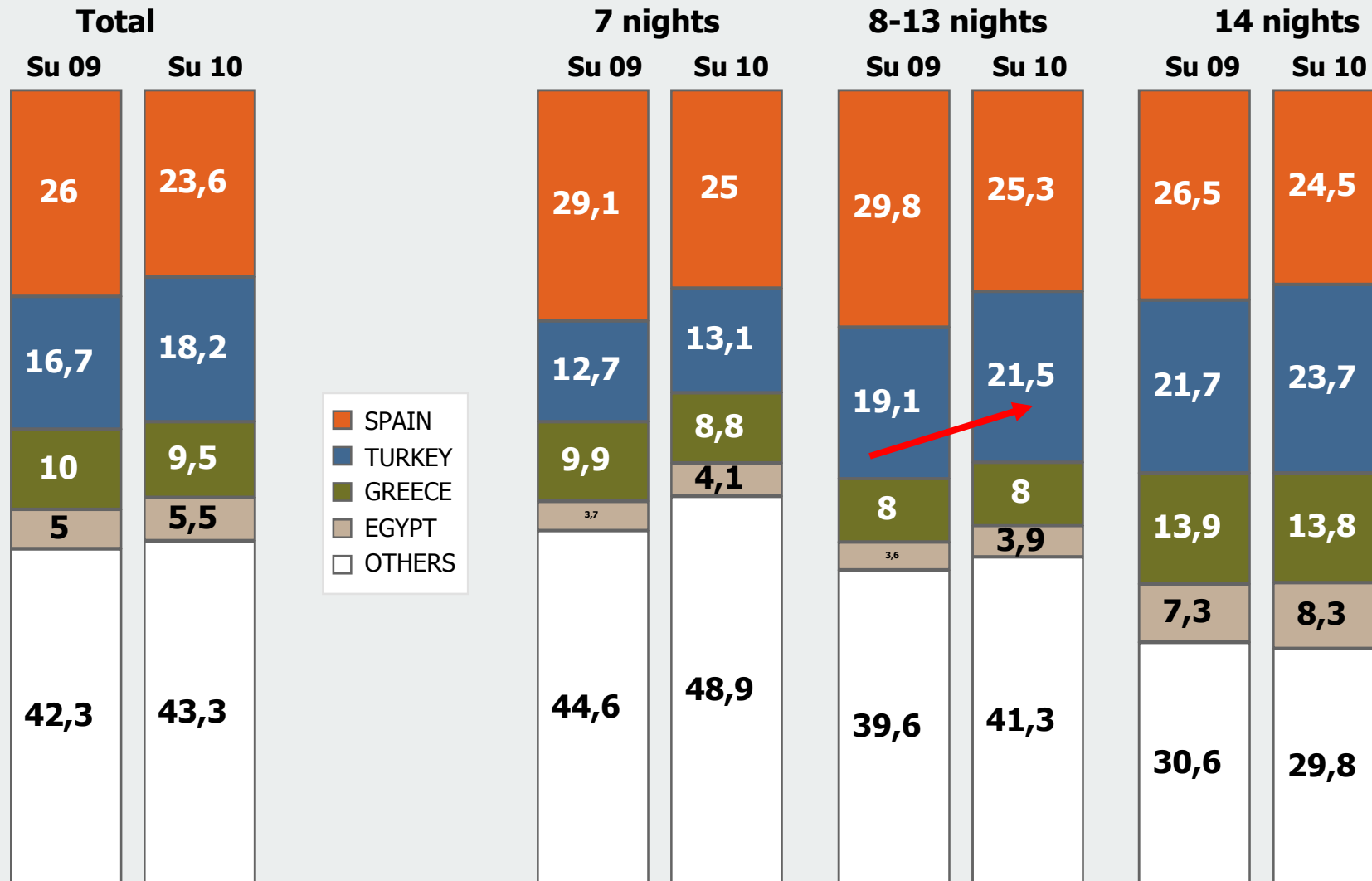


- 0-3 nights
- 4-6 nights
- 7 nights
- 8-10 nights
- 11-13 nights
- 14 nights
- 15-20 nights
- 21+nights

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Sales Value %
Summer 10 vs. 09 until Jan

Top 4 Destinations by Duration Germany



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Sales Value %




Summer 10 vs. 09 until Jan




Top 10 Destinations by Country



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	UK	
1	Spain	
2	Turkey	
3	Greece	

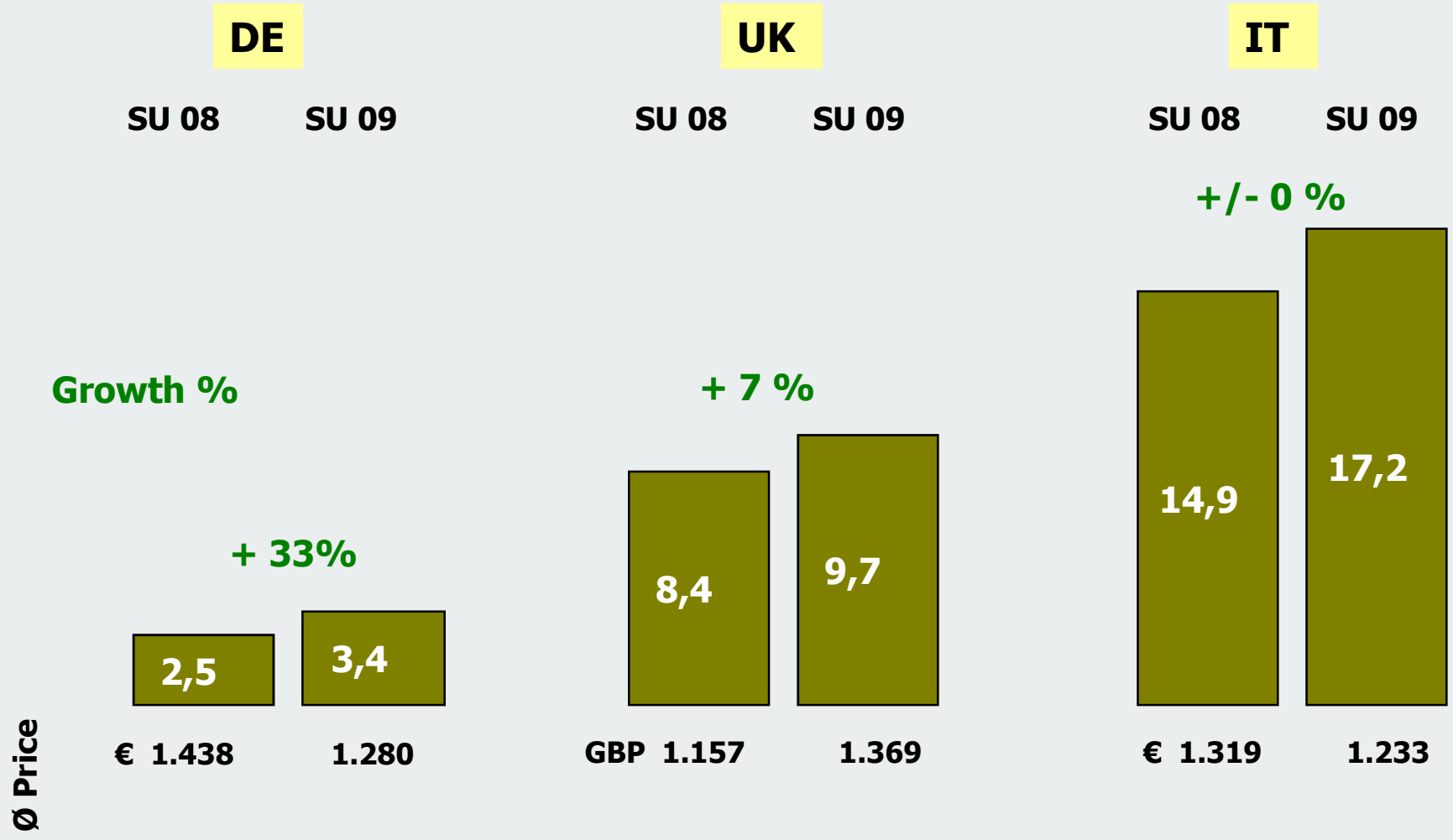
	GERMANY	
1	Spain	
2	Turkey	
3	Greece	

	NETHERLANDS	
1	Spain	
2	Turkey	
3	Greece	

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Sales Value %
Summer 10 vs. 09 until Jan

Share of Cruises





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Thank You !

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