



Press Release

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Germans go for La Dolce Vita

Italy overtakes Austria as the most popular holiday destination

Nuremberg, February 22, 2008 – A plate of spaghetti, a glass of good red wine and a balmy summer evening out on the piazza: the dream holiday of many Germans. Italy overtook Austria as the most popular destination for Germans in the 2006/2007 tourism year. The demand for special interest culture and health travel is also rising. These are the findings of the recent GfK TravelScope survey of German travel habits carried out by GfK Panel Services.

In total, Germans went on 126 million trips of at least one overnight, of which 60 million (47.7%) took them away from Germany to international destinations. According to the statistics for the period between November 2006 and October 2007, which constitutes the tourism year, Italy accounted for 14.7% of the total, making it the destination of choice ahead of Austria (14.2%) and then Spain (13.6%).

Seasonal data and length of stay

No. of holidays, in millions (tourism year 2006/2007)	Summer 2007		Winter 2006/07	
	short*	long*	short*	long*
Germany	20.1	21.2	15.4	8.5
Abroad	6.1	34.5	4.8	14.5
Total	27.1	55.7	20.2	23.0

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*short trips = 1 to 3 nights; long holidays = from 4+ nights

With two thirds of the total 35 million German households choosing to go away on holiday, Germans are increasingly living up to their reputation as the "world champions of travel". However, holidays are becoming increasingly short and currently, only 9.7 nights are spent in one place, whereas in 2004, the figure was 10.1 nights. Last year, short breaks of up to three nights away were no longer as popular, and the number of trips dropped back from 48.3 million to 47.3 million. Short breaks abroad suffered particu-

larly to fall by 3.5% from 11.3 million trips in tourism year 2005/2006 to 10.9 million in the 2006/2007 season. When Germans go away for just a few days, their destinations of choice are neighboring Austria (29.4%), Italy (14.6%) and the Netherlands (10.6%).

Spain, with its rich cultural heritage and sunny Mediterranean climate, has the definite advantage of being a classic travel destination. In the longer holiday category, Spain registered a market share of 16.1% to beat Italy (14.7%) and Austria (10.8%).

Travel to the North Sea and the Baltic on the increase

Many Germans still ask themselves: "Why go such a long way, when there are so many lovely places nearer home?" Out of the total 126 million trips booked in the 2006/2007 tourism year, at least half (52.2%) were to German destinations. North Sea and Baltic resorts benefited the most, with 1.6% more tourists choosing to go there. Conversely, travel to the alpine regions declined by 6.9%. However, in accordance with the general trend for Germany, the total number of domestic trips fell by just under 1% or a total of 126 million. However, to offset this, Germans are prepared to go on more expensive holidays and in tourism year 2006/2007, a total of 1,534 euros was spent per household per annum, which is 1% more than in the prior year. Holidaymakers also spent more on package travel, the price of which rose by 3.2%, and the same applies to individual "pick 'n' mix" bookings, which went up 1.1%.

Market shares of the top 15 German destinations abroad

in %	All holidays Ur-	Short hols*	Long hols*
Italy	14.7	14.6	14.7
Austria	14.2	29.2	10.8
Spain	13.6	2.7	16.1
Netherlands	5.8	10.5	4.8
France	5.7	9.4	4.9
Turkey	5.4	0.4	6.5
Switzerland	3.7	7.2	2.9
Greece	3.4	0.5	4.1
Czech + Slovak Repubs	2.9	6.7	2.1
Denmark	2.9	2.0	3.1
USA, Canada	2.4	0.2	2.9
Scandinavia	2.3	2.0	2.4
Great Britain	2.3	3.7	2.0
Poland	2.2	2.0	2.2
Egypt	1.9	0.00	2.3
Croatia	1.8	0.3	2.2

*Short holidays = 1 to 3 nights; long holidays = from 4+ nights

Source: GfK TravelScope 2006/2007



When it comes to holidays, quality counts

In last year's holiday season, Germans opted for quality when choosing where to stay on their holidays. On longer holidays consisting of more than four nights away, in particular, they increasingly chose to 4 or 5 star luxury hotels. For many Germans, the best days of the year still carry a high priority, which is why they are quite prepared to invest in them.

Culture and health special interest travel is fashionable

So what do Germans do on holiday? Well, although 23.7% still go on a traditional beach holiday, around 28.4% are now choosing to learn more about other cultures and places. With growth in excess of 10%, the trend towards health and fitness travel and cruising remains unabated. Of course, this is all relative, since the starting point was comparatively low, with a 4.2% share going to wellness and 1.4% to cruising. The GfK survey also showed that Germans are choosing fewer and fewer package holidays, but choosing to put together their own individual holidays themselves. The general social trend towards the cult of the individual is also very much reflected in the tourist industry.

Online bookings up again

Increasingly, travelers are making their bookings online. Even when preparing their holiday plans, this is now the medium of choice for much of the population. The Internet is now the second most important medium after travel agencies when it comes to personal travel bookings. Online sales of advance travel bookings now run to around 7.5 billion euros (excluding email bookings). This is just under half the volume booked thru high street travel agencies. Overall, online travel bookings grew by 7% last year, growth which is mainly accounted for by repeat bookings from travelers with previous online booking experience.

The survey

GfK TravelScope is based on a continuous survey of German holiday travel, booking and information-seeking habits and travel destinations. In total, 20,000 households are surveyed on their travel habits in around 160,000 interviews conducted every year in four survey waves.

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