

A world map is displayed in a light blue, semi-transparent style against a dark blue background. The map shows the continents of North America, South America, Europe, Africa, and Asia. The background of the entire slide features a sunset or sunrise over a horizon line, with a gradient from dark blue at the top to orange and yellow at the bottom.

Corporate Social Responsibility in Tourism

Consumer requests and supplier images

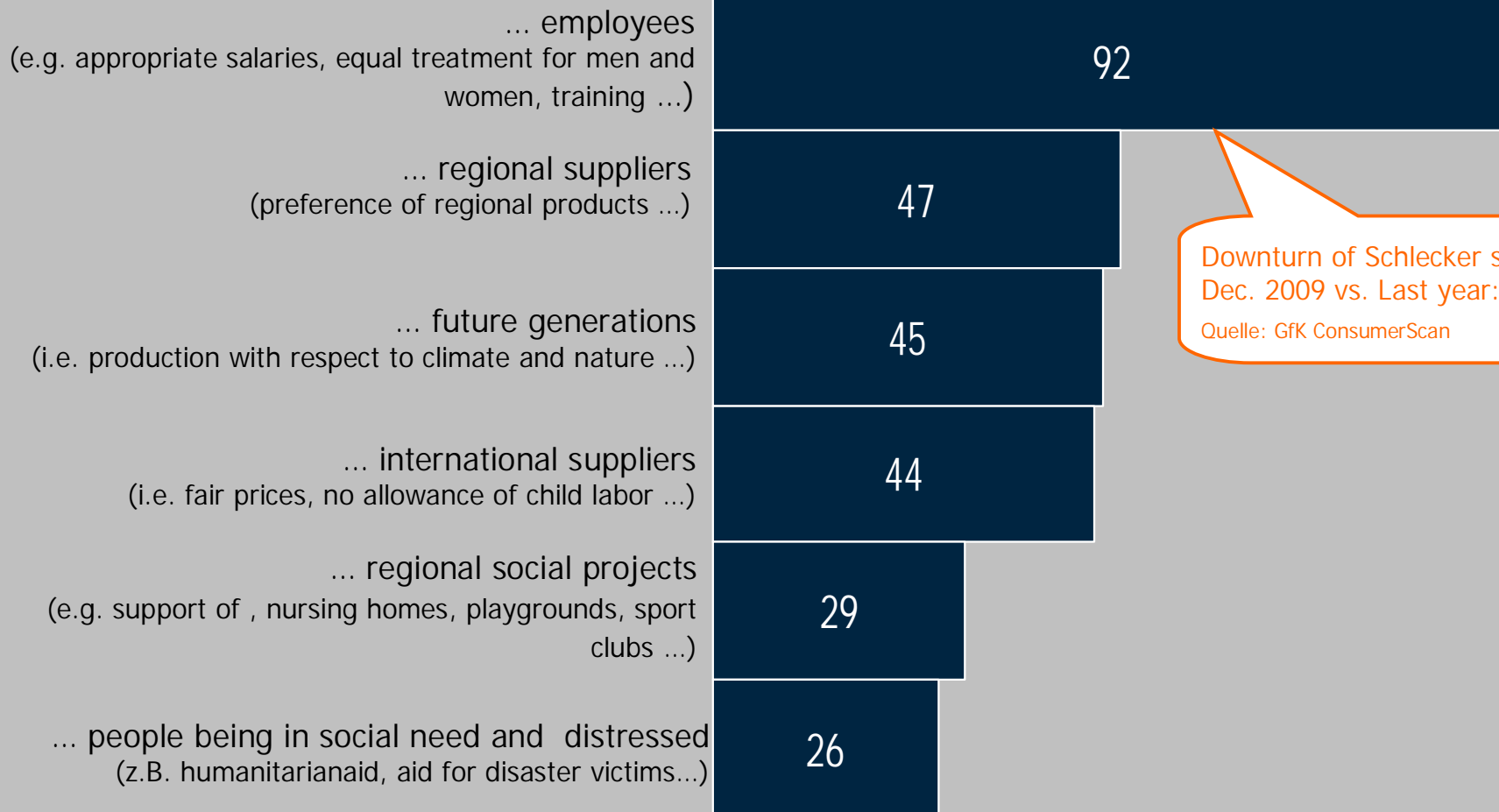
ITB Berlin – 11th March 2010

Dr. Wolfgang Adlwarth – GfK Panel Services Germany

Need of responsible corporate action

Statements (in %)

Responsible corporate action towards ... is considered to be particularly important



Downturn of Schlecker sales:
Dec. 2009 vs. Last year: -11%
Quelle: GfK ConsumerScan



The financial and economic crisis caused a lack of trust

Trustworthiness of providers is questioned more strongly

Learning: „Blind trust is wrong.“

Consequences: Well-founded trust becomes more important.

- Reliability
- Creditability
- Integrity
- Responsibility

(yearning to more social equality, fairness, moral)



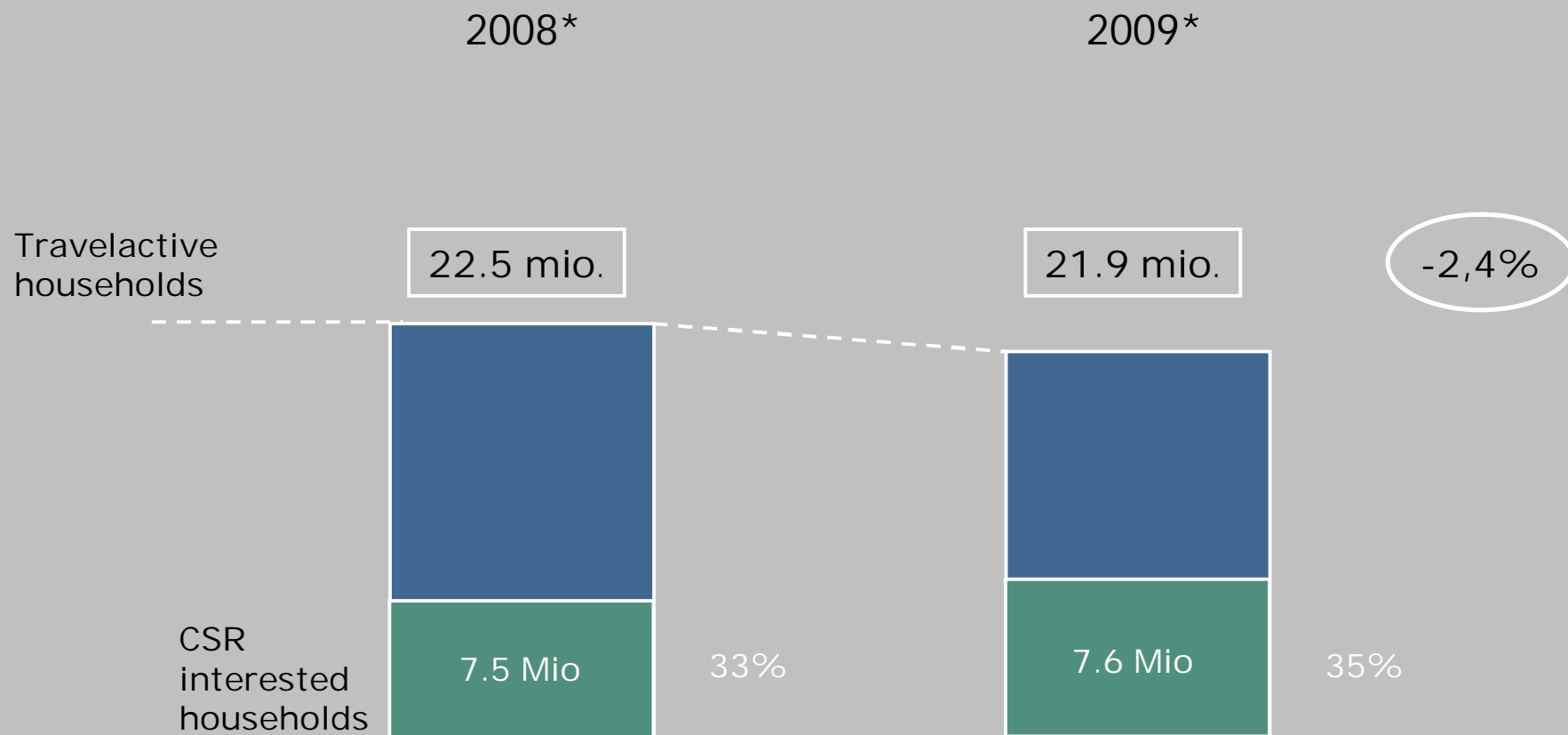
3

Traditional brands, German and regional products as well as organic products and fair trade increased sales further in 2009*



The share of tourists with affinity to CSR among the traveling German households increased further despite the crisis

4



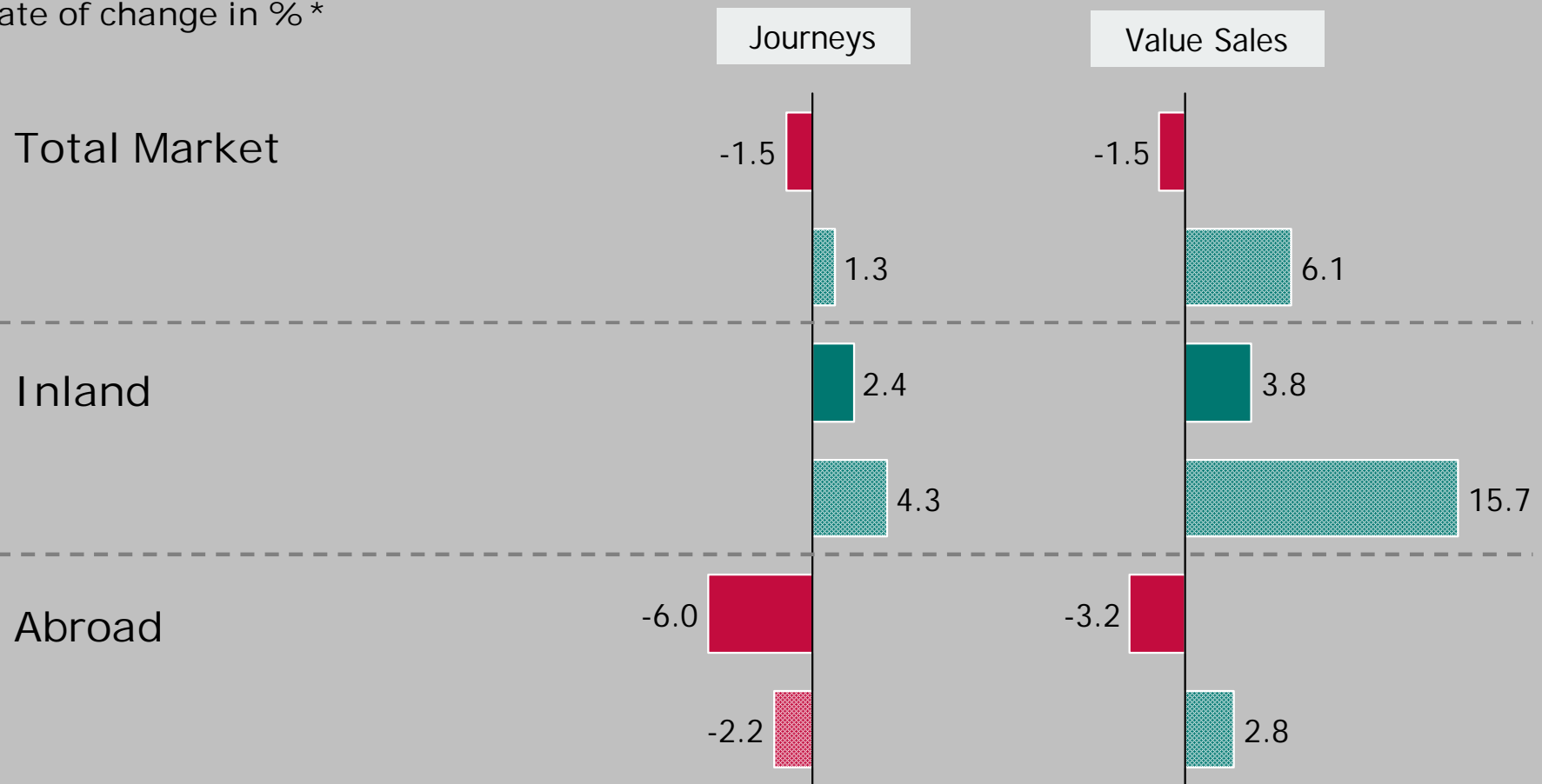
* tourist year Nov-Oct

Quelle: GfK TravelScope 20.000 Households

Tourists with affinity to CSR stabilized the travel market in 2009 and pushed the trend towards domestic tourism further ahead

5

Rate of change in % *



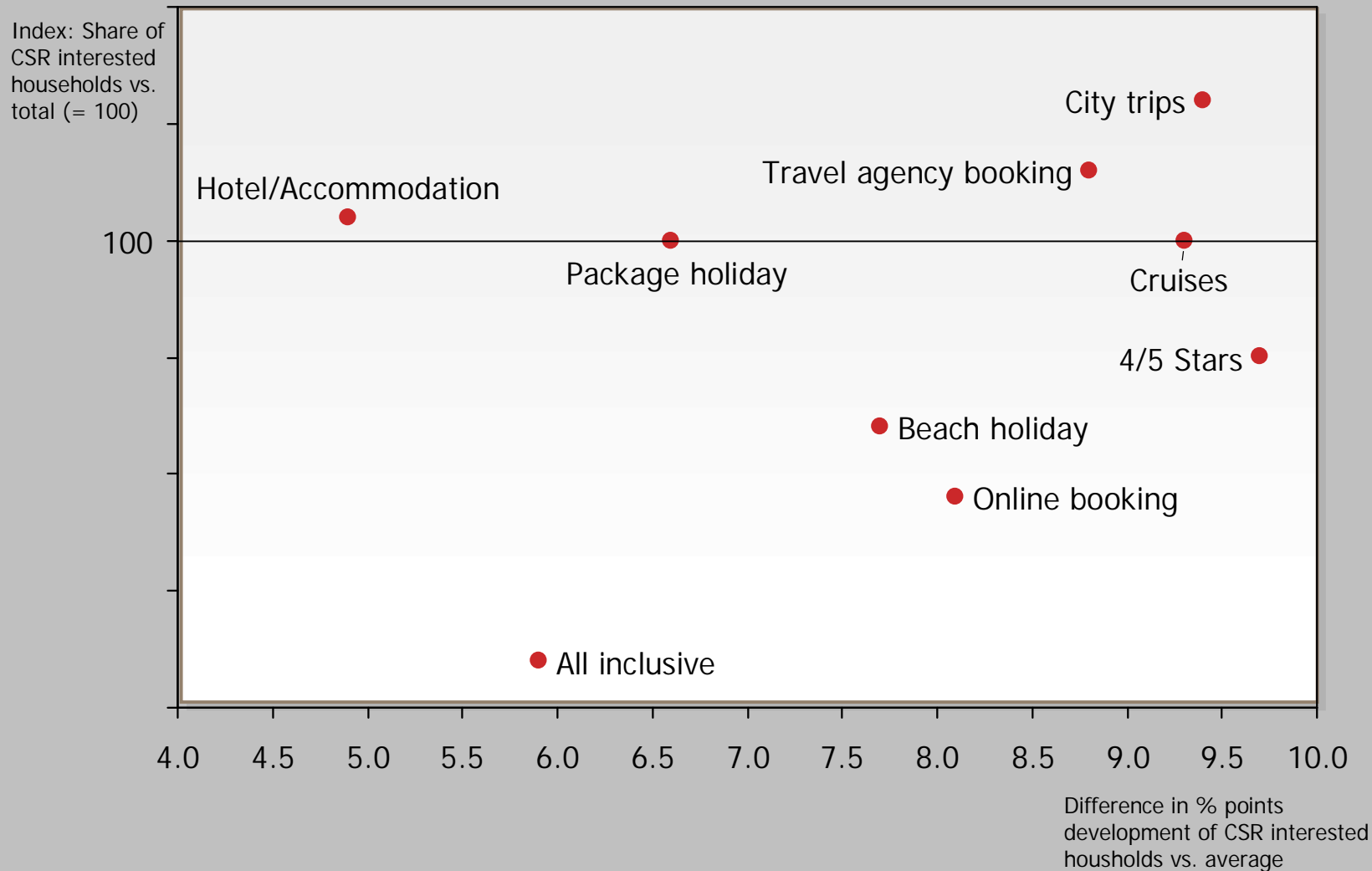
*tourist year 2008/2009 vs. 2007/2008

Legend:
Total (Solid Green/Red)
CSR-Affinity (Hatched Green/Red)



CSR-affine households showed an above average growth in segments like city trips, cruises and travel agency booking

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The Research Approach: Single Source Analysis on Travel Behavior and CSR requests and images

7

GfK TravelScope

Continuous consumer tracking on holiday behaviour at 20,000 households

CSR Profiler

Basic survey and analysis on CSR in cooperation with Roland Berger 20,000 households

Target Group Survey

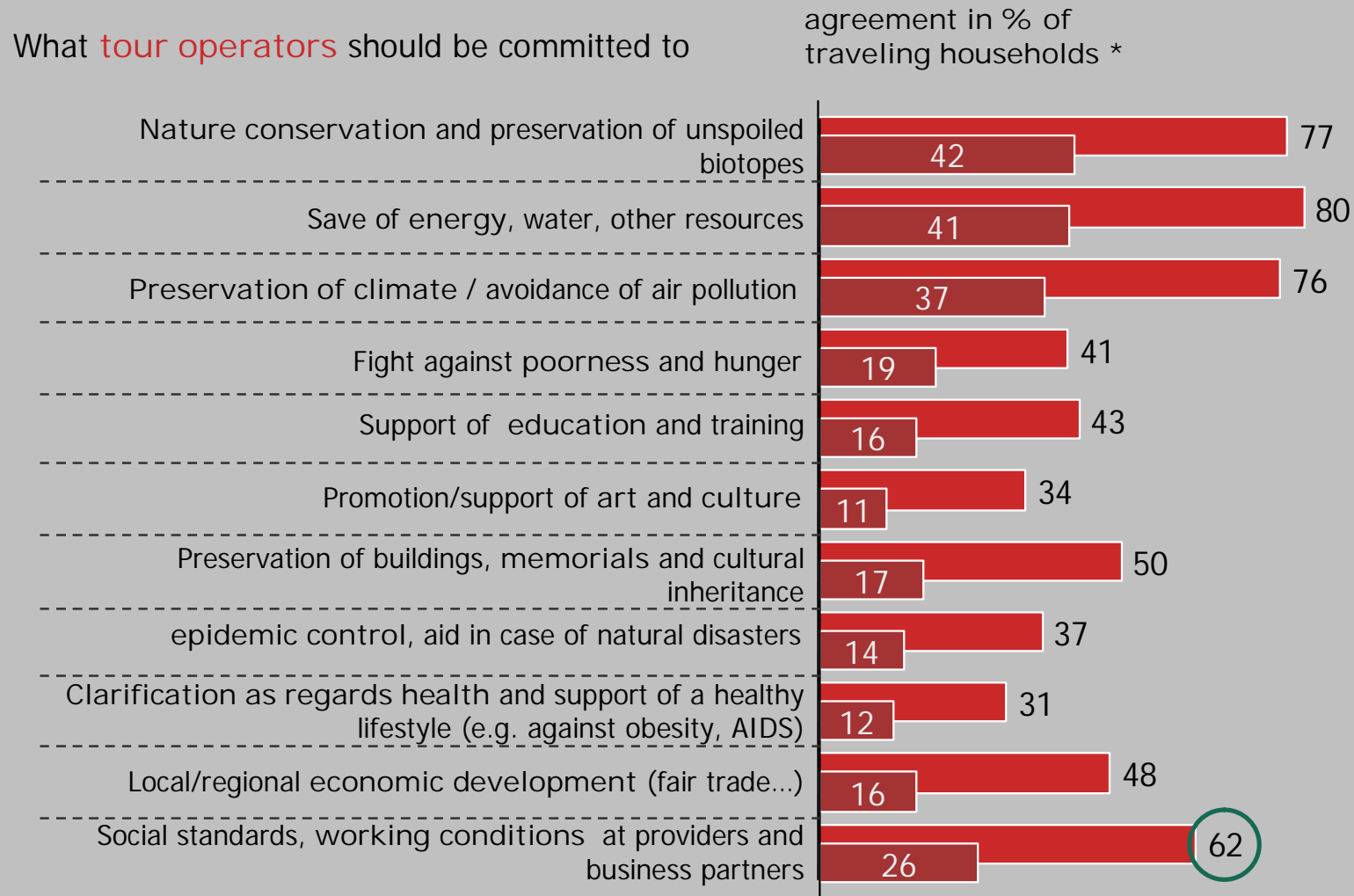
1000 traveling households, each

Topics: Demands on CSR and assessment of

- Tour operators
- Transport services
- Tourist regions

Requests

Tour operators are primary expected to be committed to ecology as well as secondarily to social issues



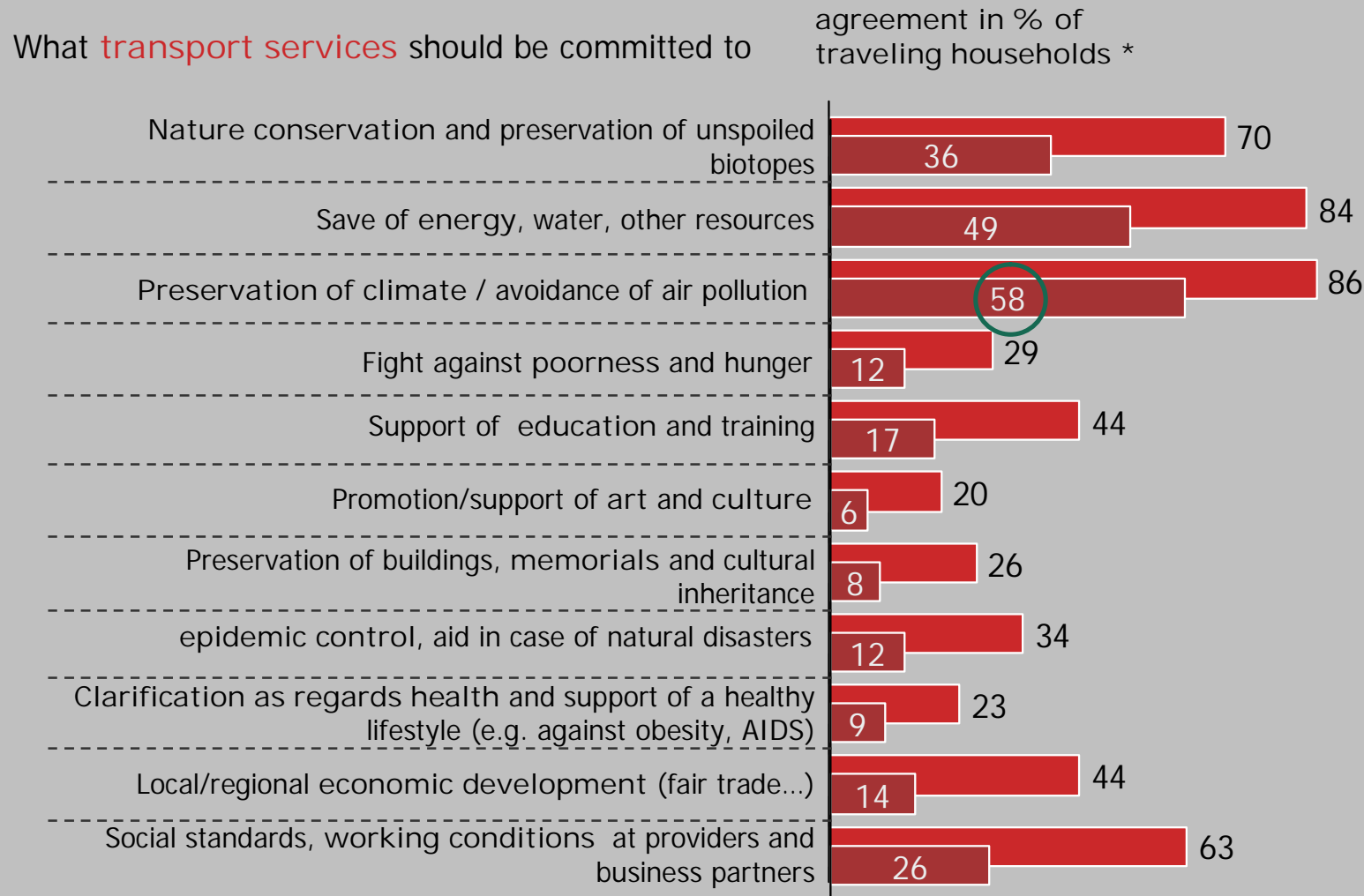
* Topboxes (4/5)

Source: ad-hoc study conducted among GfK TravelScope panelists, Dec. 2009

= very strong

Climate protection is chiefly what transport services are expected to be committed to

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* Topboxes (4/5)

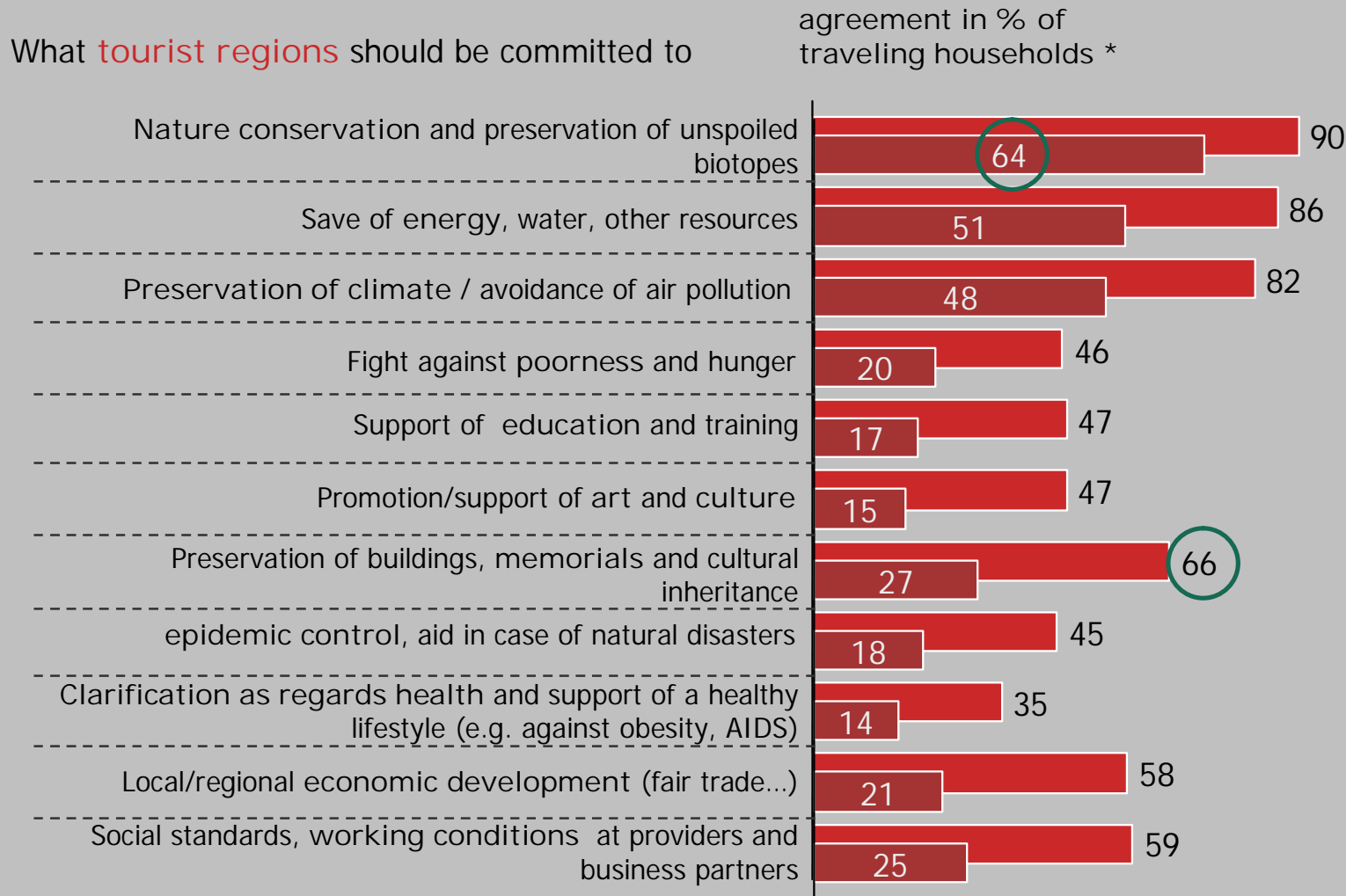
Source: ad-hoc study conducted among GfK TravelScope panelists, Dec. 2009

= very strong



Tourist regions uppermost score with commitment to nature conservation but also to cultural promotion

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* Topboxes (4/5)

Source: ad-hoc study conducted among GfK TravelScope panelists, Dec. 2009

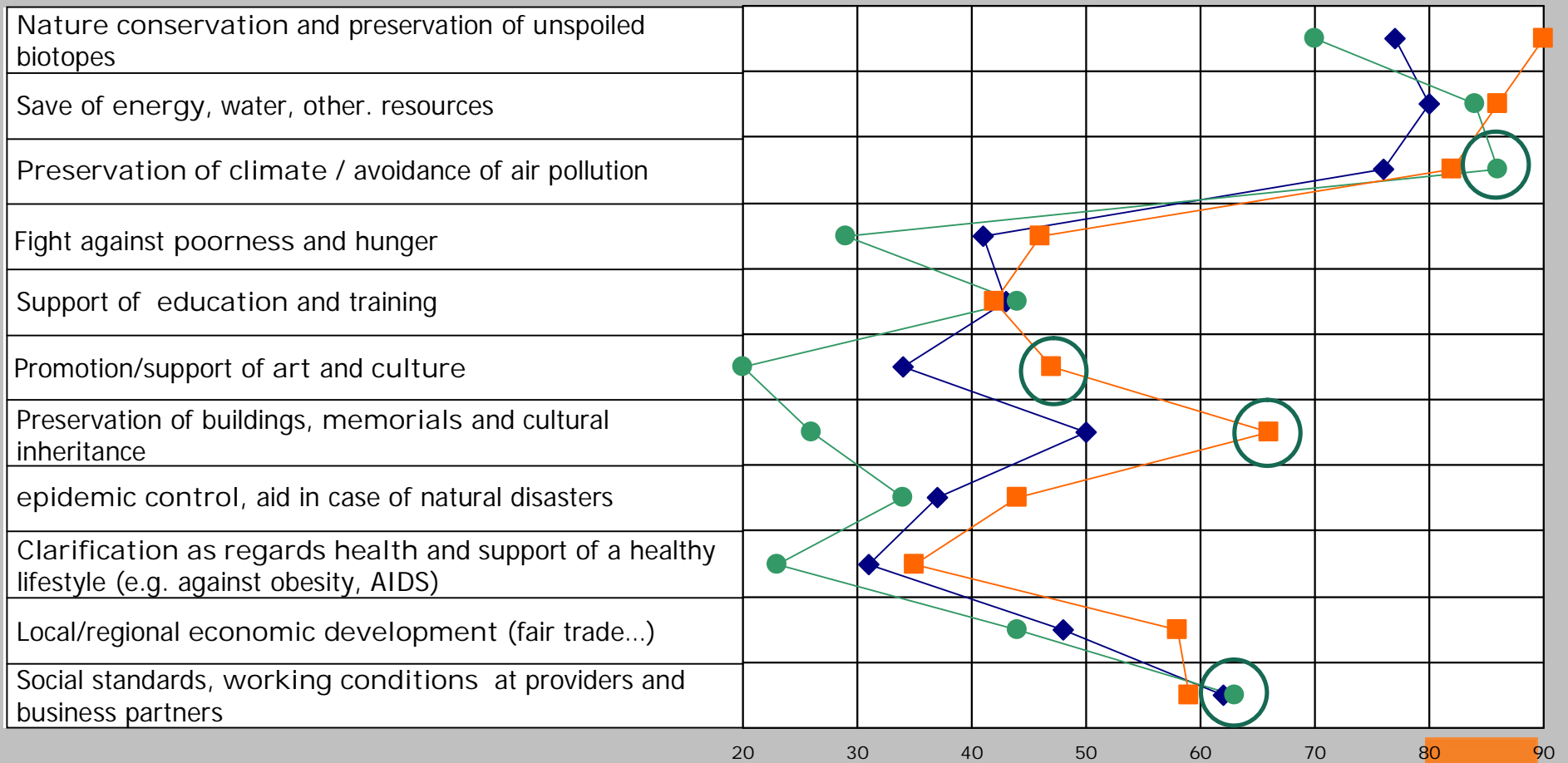
= very strong

The greatest demands are placed on tourist regions in general

Top box 4/5

12

◆ Tour operators ● Transport services ■ Tourist regions



Source: ad-hoc study conducted among GfK TravelScope panelists, Dec. 2009

Corporate Social Responsibility is equal to ecology in terms of tourism

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| Total | The most important issue | Tour operator | Transport services | Tourist regions |
|-------|--|---------------|--------------------|-----------------|
| 30 | Naturschutz und Erhaltung ursprünglicher Lebensräume | 30 | 12 (15) | 48 |
| 22 | Klimaschutz / Vermeidung von Luftverschmutzung | 15 | 41 | 10 (13) |
| 18 | Einsparung von Energie, Wasser und sonstigen Ressourcen | 16 | 23 | 15 |
| 10 | Einsatz für soziale Standarts und Arbeitsbedingungen bei Zulieferern und Geschäftspartnern | 14 (22) | 9 | 6 (8) |
| 6 | Bekämpfung von Armut und Hunger | 7 | 4 | 6 |
| 4 | Erhaltung von Bauten, Denkmäker und kulturellem Erbe | 5 | 1 | 5 |
| 4 | Lokale und reginale Wirtschaftsförderung in unterentwickelten Gebieten (fair trade...) | 4 | 3 | 3 |
| 3 | Förderung von Bildung und Ausbildung | 4 | 4 | 2 |
| 1 | Unterstützung / Förderung von Kunst und Kultur | 2 | 1 | 1 |

() = CSR-interested

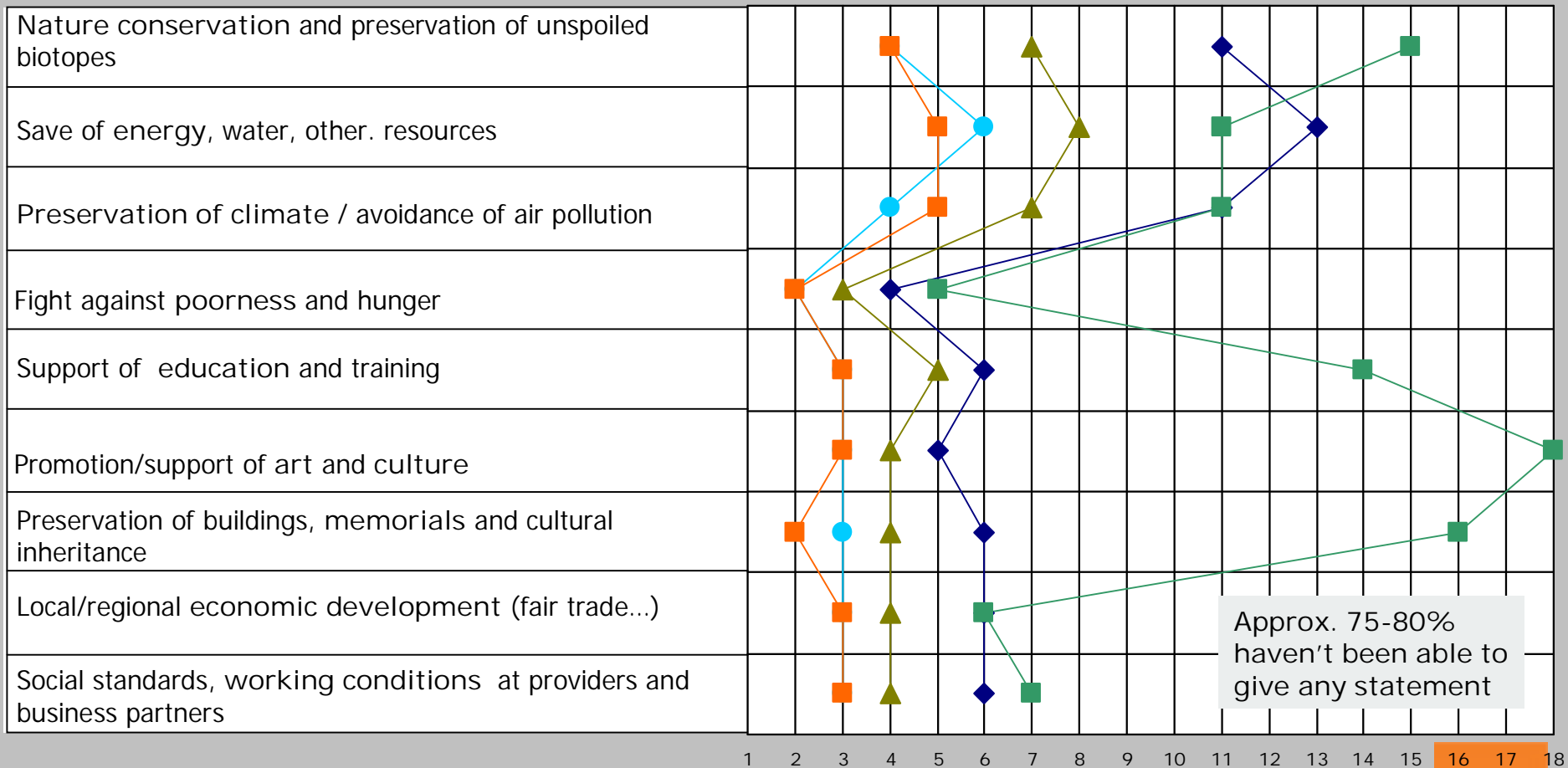
Images

The big tour operators do not have any CSR related image, yet

Image of **tour operators** in terms of CSR
 ("To what degree is committed to the below mentioned issues")

15

◆ TUI ● Alltours ■ ITS ▲ Neckermann ■ Studiosus



Approx. 75-80% haven't been able to give any statement

*Agreement (top box 4/5) in %

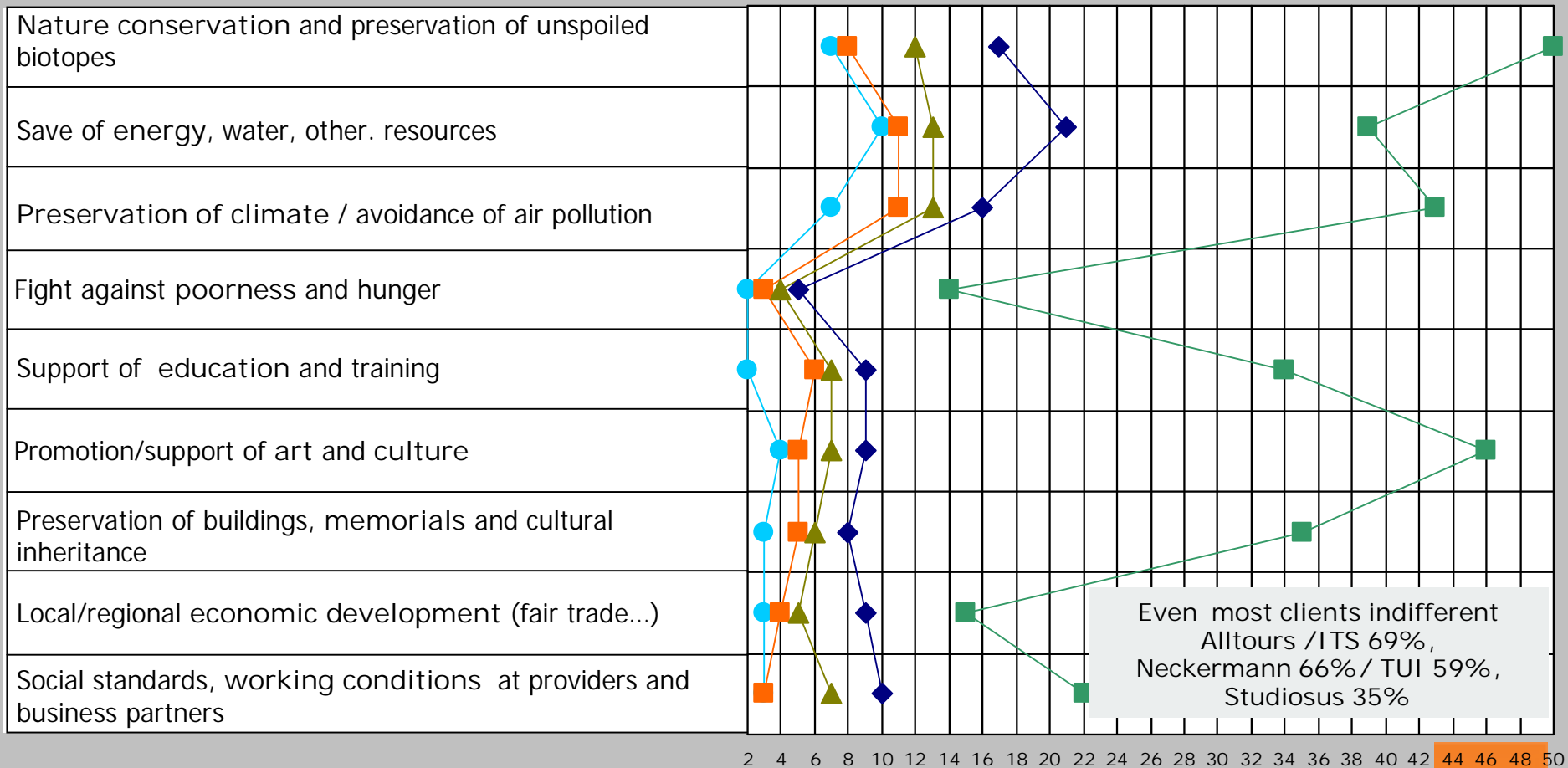
Base: households that are familiar with the name of the corresponding tour operator, at least



Except Studiosus, even among their clients tour operators lack a CSR related image

Image of **among clients** in terms of CSR

◆ TUI ● Alltours ■ IST ▲ Neckermann ■ Studiosus



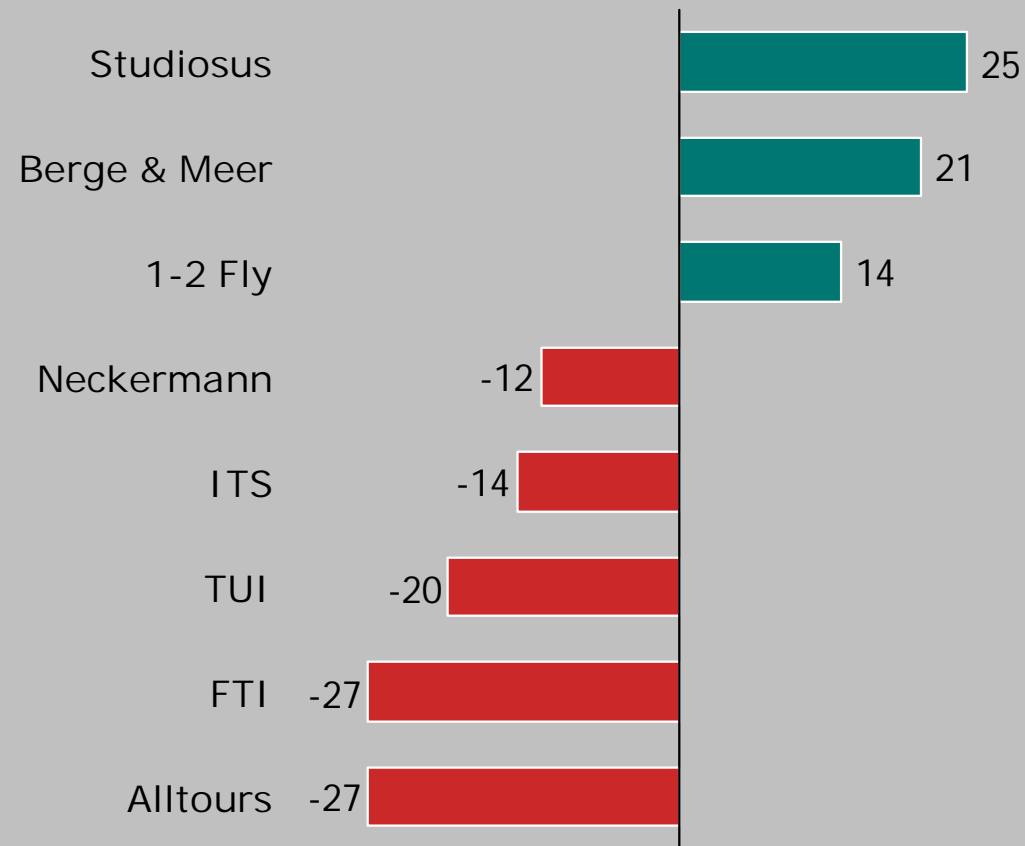
Even most clients indifferent
Alltours /ITS 69%,
Neckermann 66% / TUI 59%,
Studiosus 35%

*Agreement (top box 4/5) in %

Base: households that already traveled with the corresponding tour operator

The top tour operators are not able to make full use of the households interested in CSR

Tour operators that have been booked disproportionately **little** or **high** by CSR-interested households *

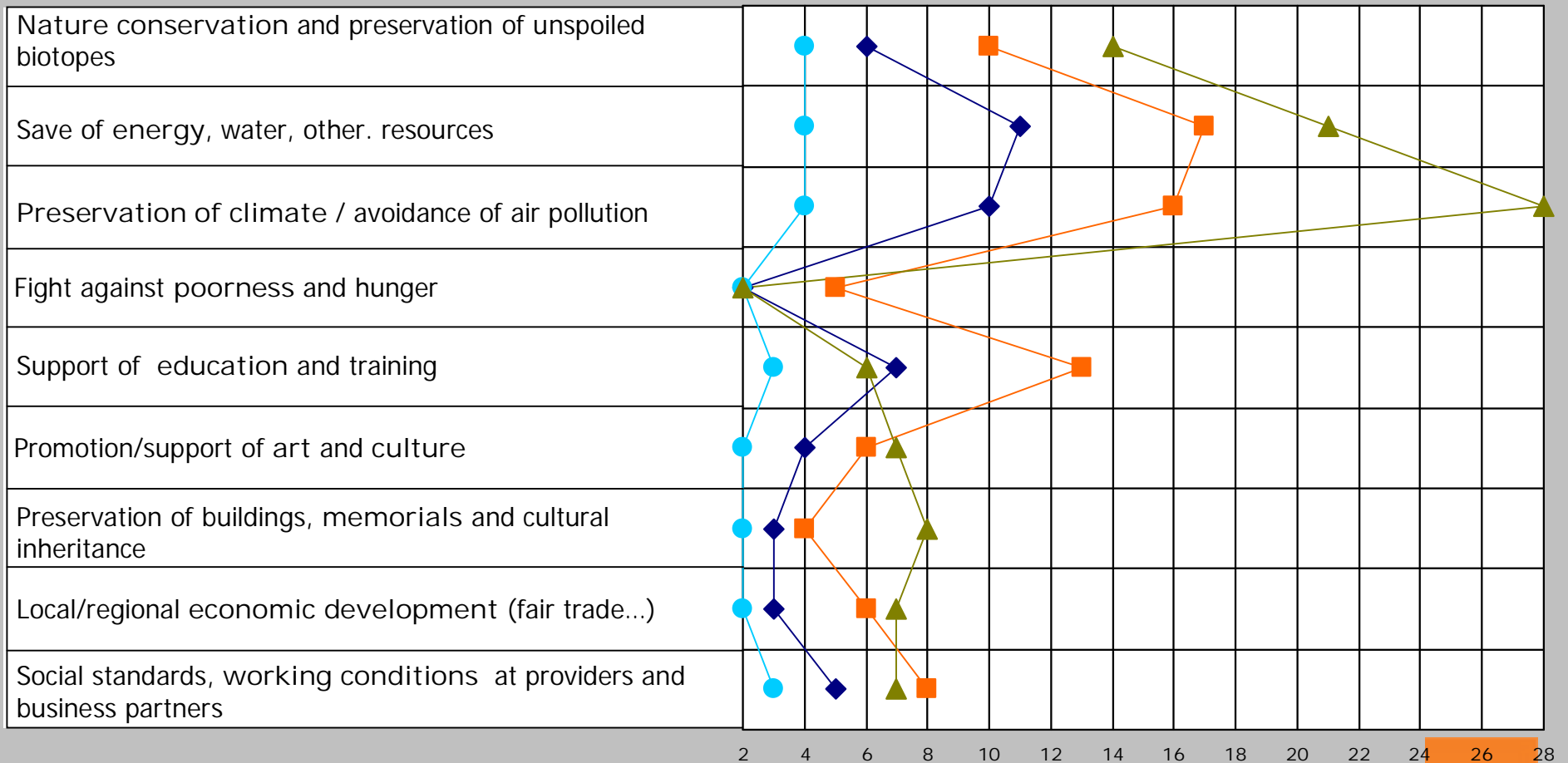


Deutsche Bahn is absolutely said to show ecological commitment, although the main part of the respondents does not have any idea, here as well

Image of **transport services** in terms of CSR

("To what degree is committed to the below mentioned issues")

◆ Air Berlin ● Air France ■ Lufthansa ▲ Deutsche Bahn



*Agreement (top box 4/5) in %

Base: households that are familiar with the name of the corresponding transport service, at least



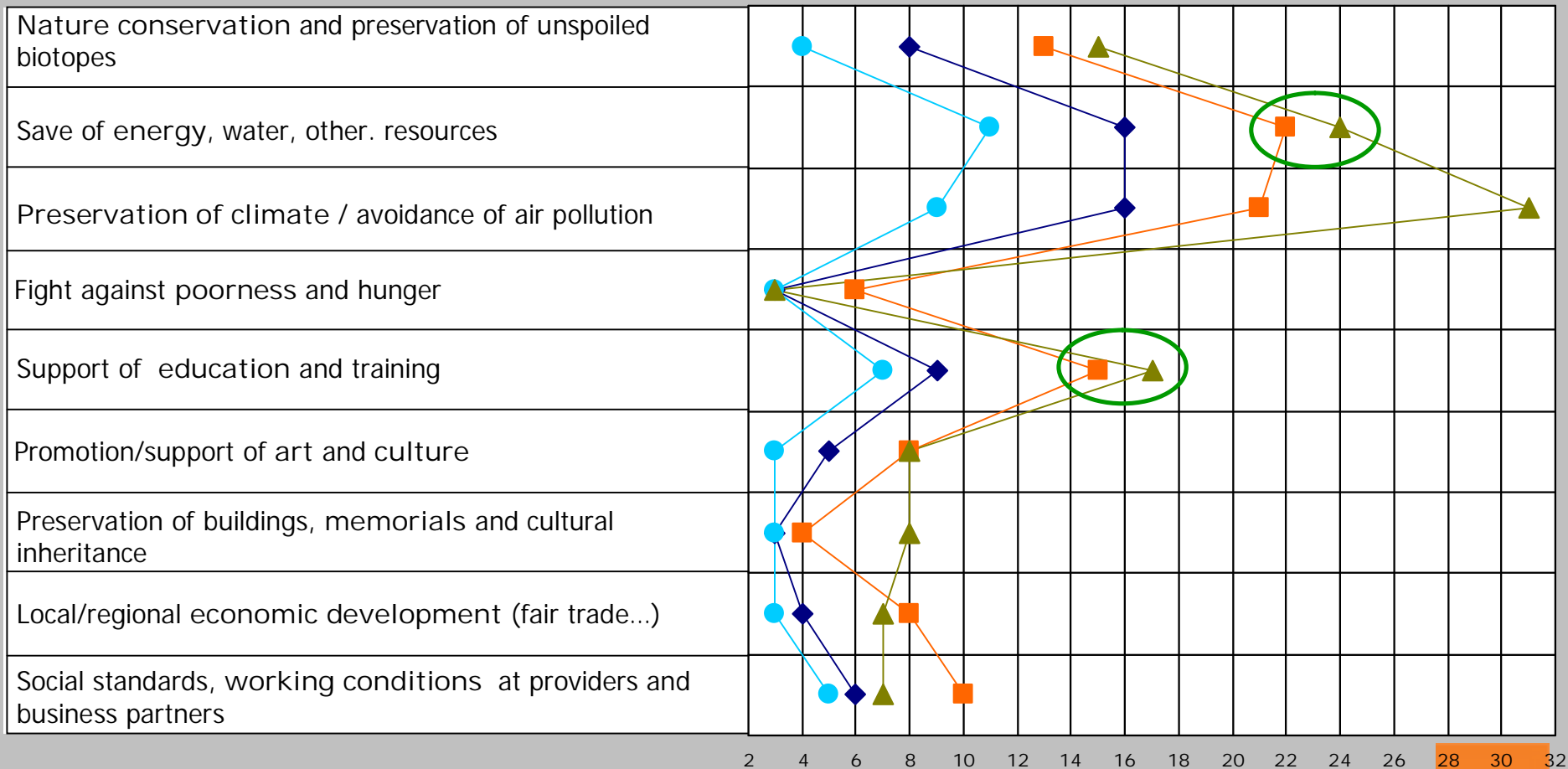
Even among their clients, airlines have a limited CSR related image

Image of ... in terms of CSR **among clients**

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("To what degree is committed to the below mentioned issues")

◆ Air Berlin ● Air France ■ Lufthansa ▲ Deutsche Bahn



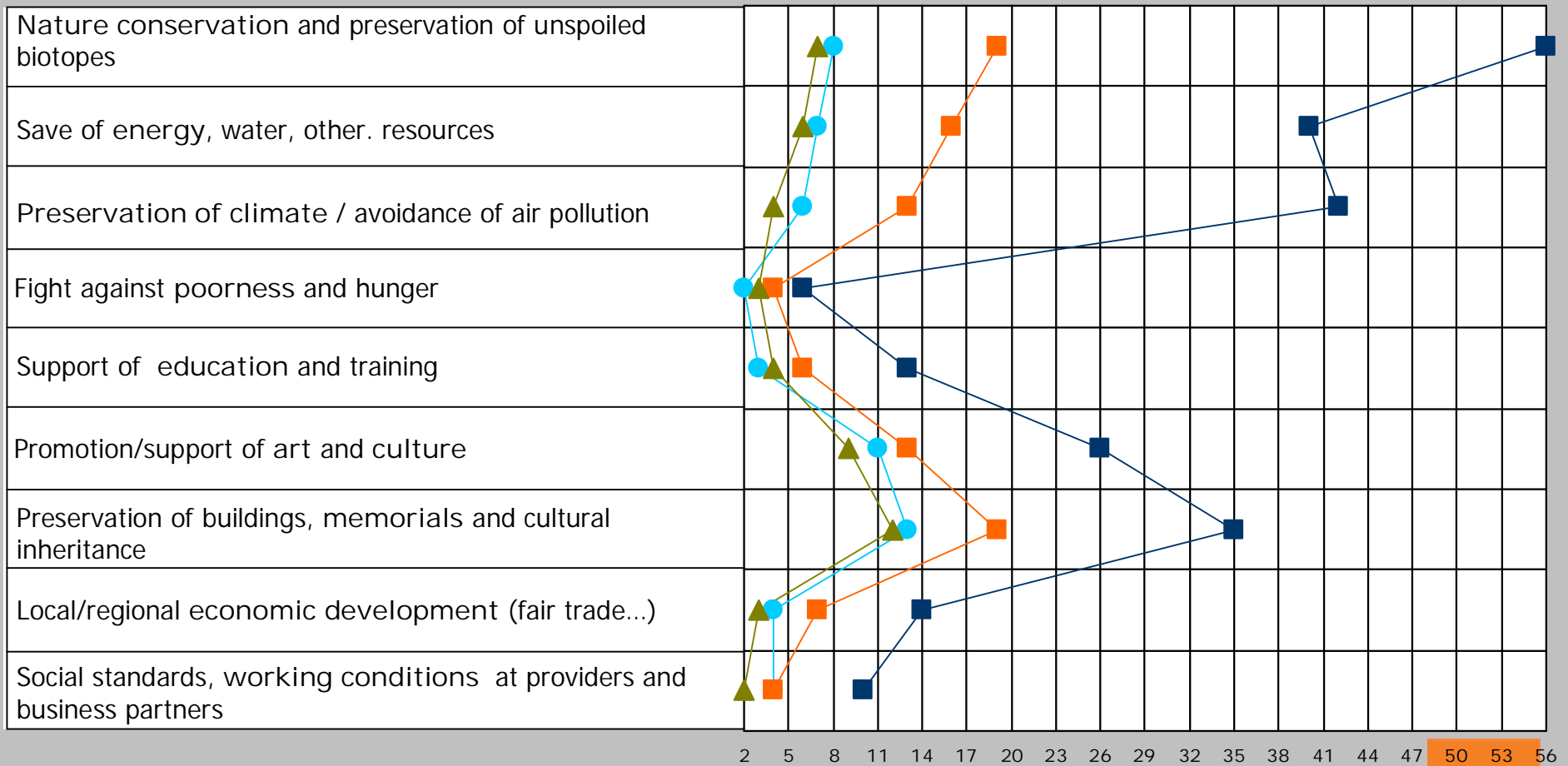
*Agreement (top box 4/5) in %

Base: households that already traveled with the corresponding transport service

The North Frisian islands enjoy a distinctive ecological image

Image of **tourist regions** in terms of CSR
 ("To what degree is committed to the below mentioned issues")

—●— Adriaküste —■— Mallorca —▲— Rotes Meer —■— Nordfr. Inseln



*Agreement (top box 4/5) in %

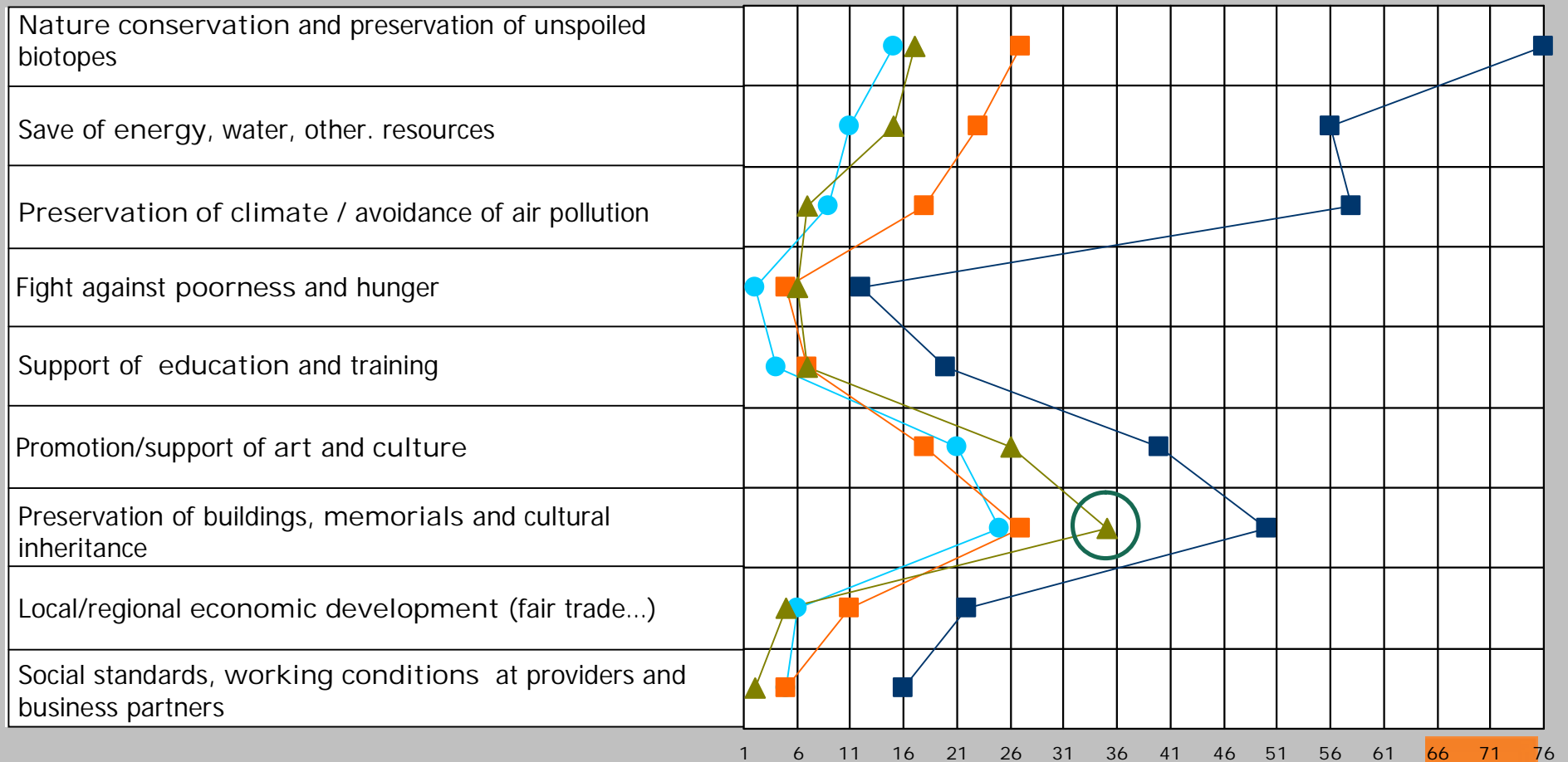
Base: households that are familiar with the corresponding tourist region, at least

North Frisian Islands achieved to convince their visitors by their ecological activities - other regions mainly focused on cultural inheritance

Image of... in terms of CSR **among clients**

("To what degree is committed to the below mentioned issues")

—●— Adriaküste —■— Mallorca —▲— Rotes Meer —■— Nordfr. Inseln

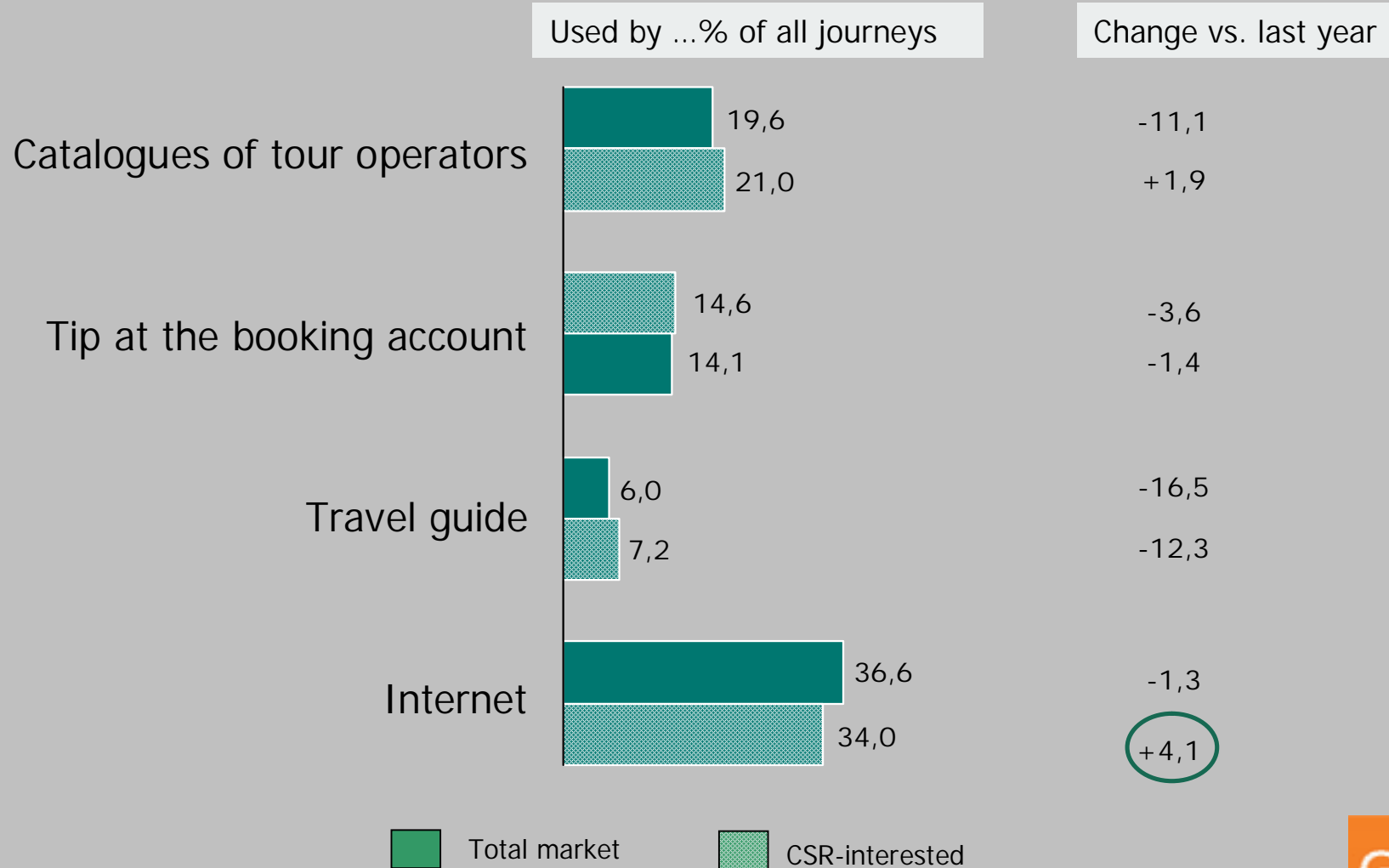


*Agreement (top box 4/5) in %

Base: households that already visited with the corresponding tourist region

Internet as a source of information is still underrepresented among CSR-interested travellers, although showing an upward trend

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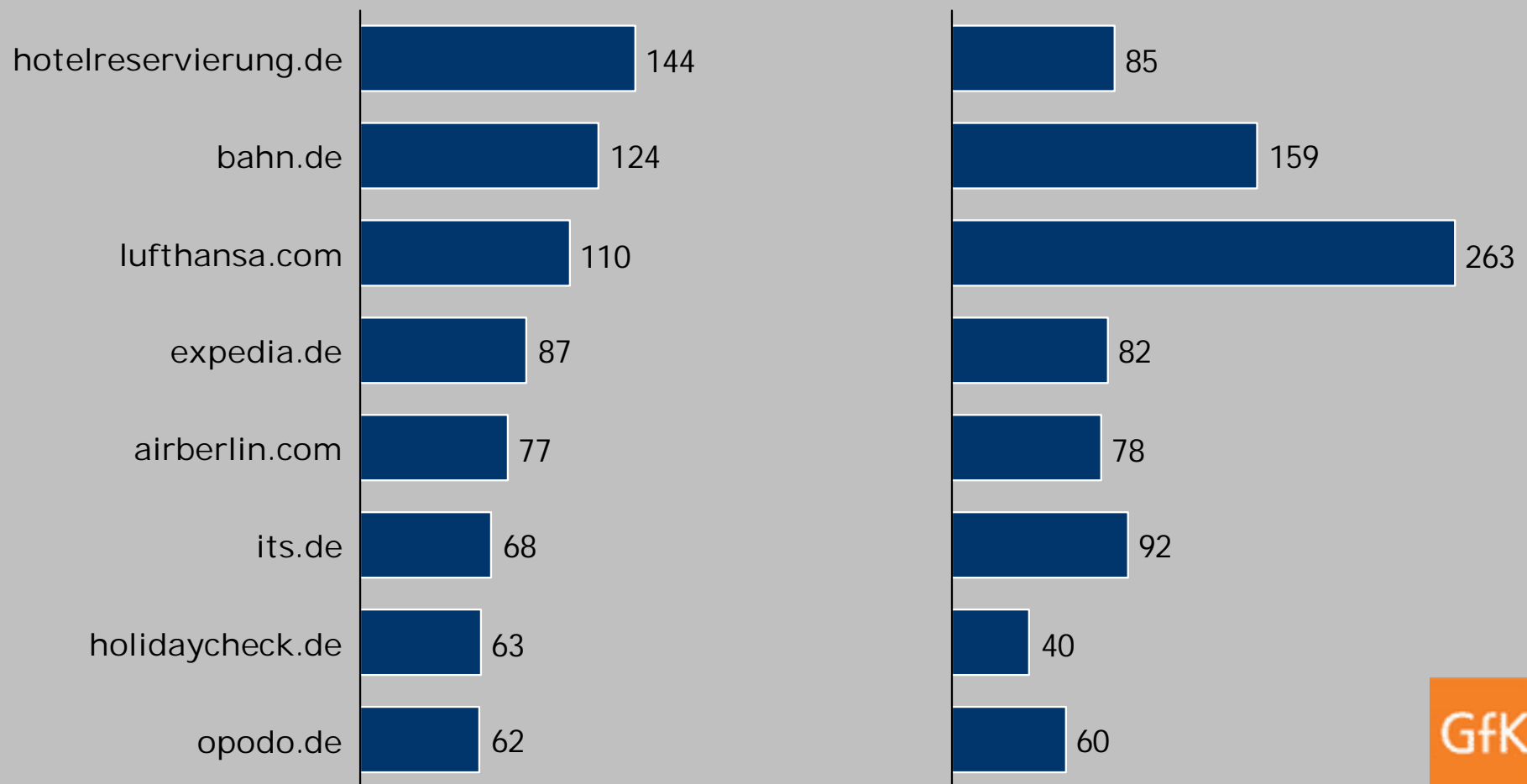
Good approach to CSR-sensible households via websites of hotel-booking platforms

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CSR-interested

Index Reach

Index Duration/Person



Source: GfK Web efficiency panel ,

Fazit

- CSR- affine Touristen gewinnen an Bedeutung – auch oder gerade in der Krise.
- CSR-Sensible stabilisieren den Reisemarkt und stützen den Trend zum Binnentourismus.
- Social Responsibility im Tourismus ist stark durch ökologische Aspekte geprägt, bei Veranstaltern und Carriern auch durch Sozialstandards im Erstellungsprozess.
- Für Ferienregionen werden zudem kulturenerhaltende Maßnahmen erwartet.
- Reiseveranstalter sind bislang hinsichtlich CSR überhaupt nicht profiliert – Ausnahme: Studiosus.
- Gleiches gilt für Airlines, nur die DB hat schon ein positives CSR-Image bei Umwelt.
- Feriengebiete wie die Nordfriesische Inseln sind heute schon sehr profiliert – auch in der breiten Bevölkerung.
- Ansonsten gewinnen Feriengebiete wohl erst durch eigene Anschauung: Die CSR-Profiles sind bei den eigenen Kunden deutlich positiver
- Dabei punkten Feriengebiete häufig durch Pflege ihrer kulturellen Eigenheiten.
- Alles in allem: Große Potentiale, durch - ernstgemeinte - CSR-Maßnahmen eine wachsende kaufkräftige Zielgruppe zu erreichen.

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Thank you very much for your
attention

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