

A world map is displayed in the background, rendered in a light blue and white color scheme against a dark blue background. The map shows the continents and is centered on the Atlantic Ocean.

Corporate Social Responsibility in Tourism

Consumer demands and image of suppliers

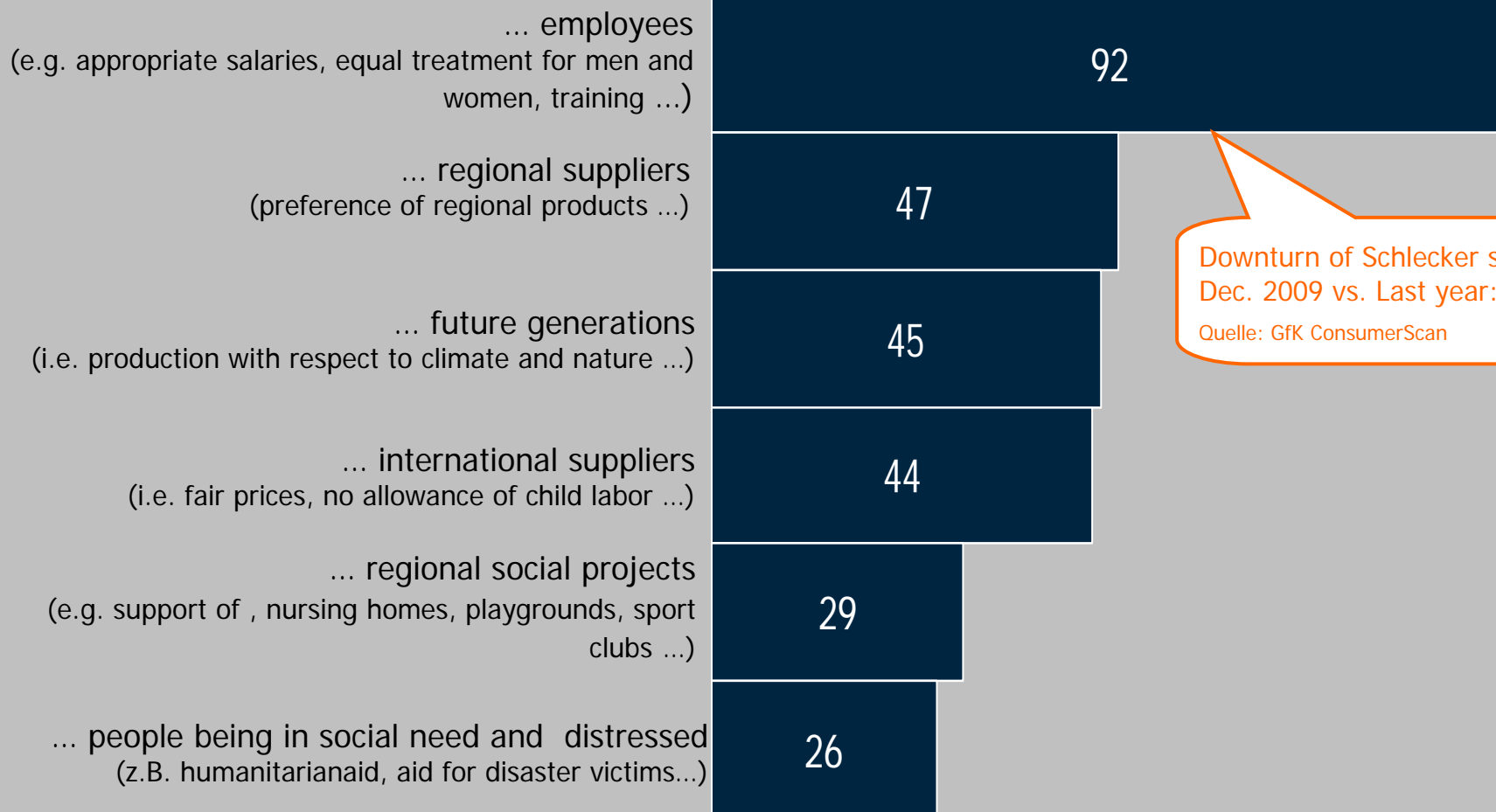
ITB Berlin – 11th March 2010

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
- Social Responsibility

(yearning to more social equality, fairness, moral)



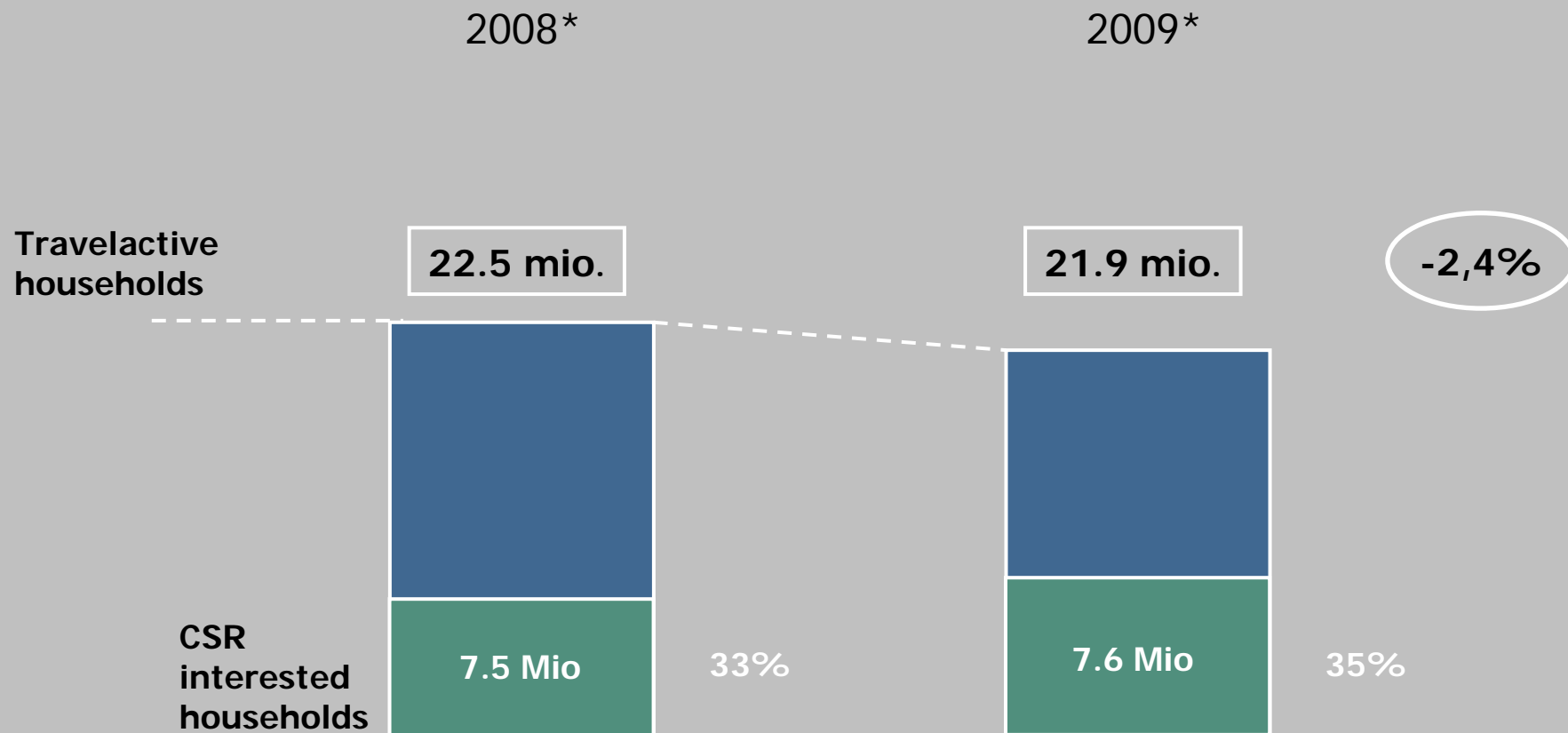
3

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

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* tourist year Nov-Oct

Quelle: GfK TravelScope 20.000 Households

Psychological consequences of the financial- and economic crisis

Own attitudes and actions have also been questioned

Learning: „avarice eats brains“

Consequences: more reflection:

- more modesty
- more conscious consumption
- quality instead of quantity



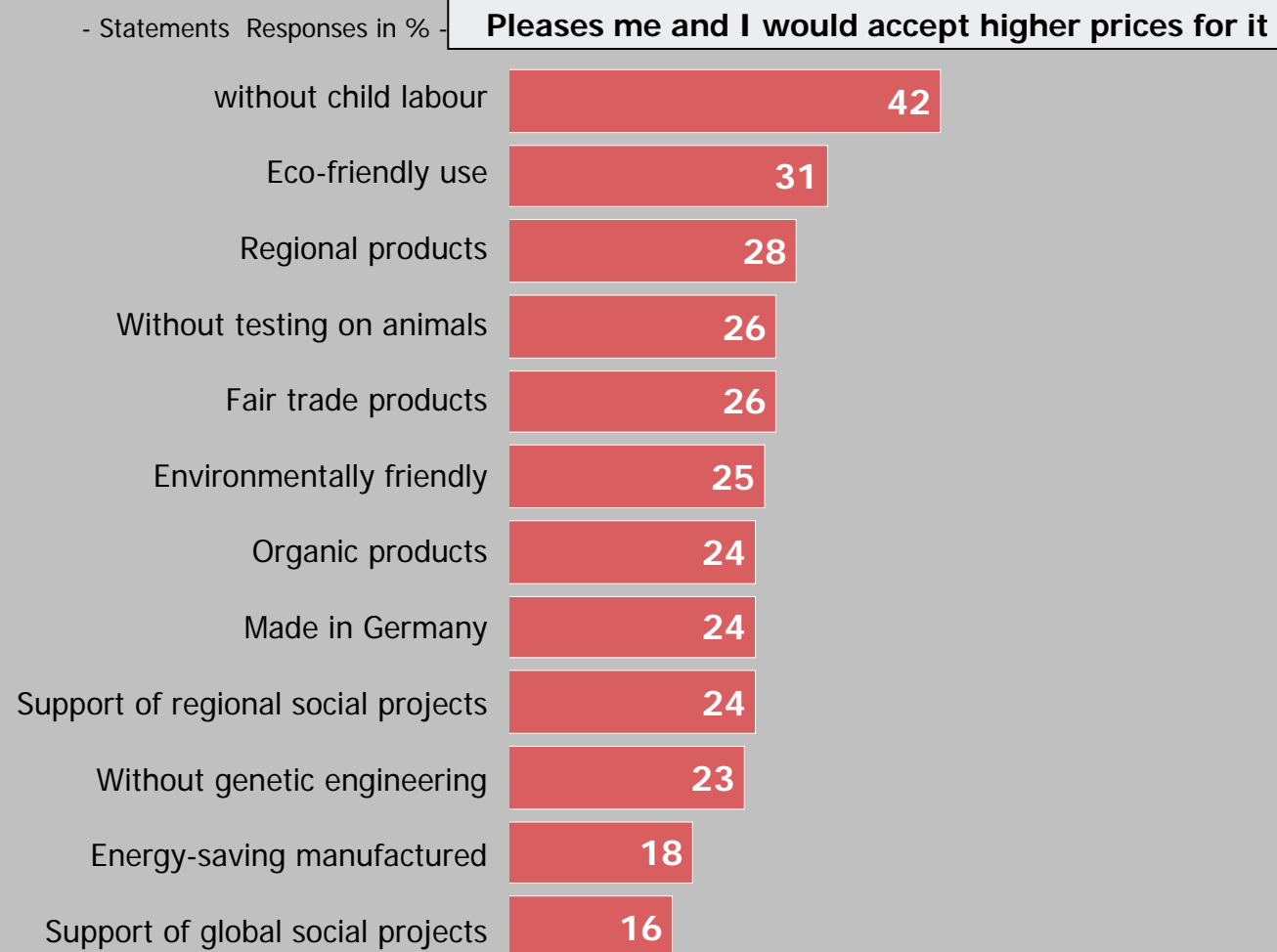
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Sales of organic food, organic cosmetics, health supporting products, fair trade as well as German and regional products showed further increase in 2009*

Ethical additional value as quality aspect of consumption

Advertisement with additional product features

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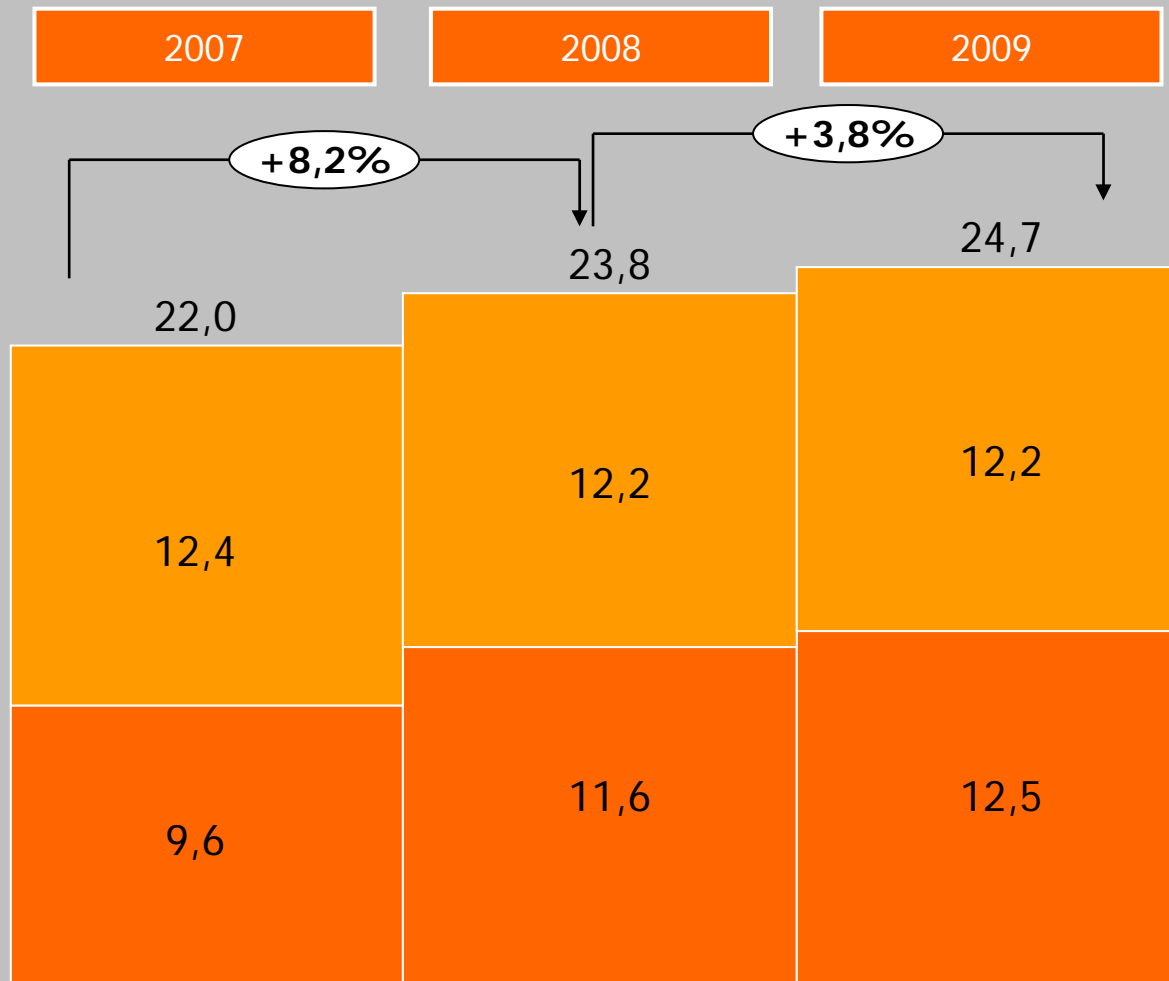


GfK

Lifestyle of Health and Sustainability (LOHAS) still trendy

Health and sustainability

Responses in %



Environment, climate, health, organic, human rights, social justice, working conditions ...

Organic products, organic cosmetics, fair trade, German and regional products with further growth in 2009

LOHAS core group LOHAS marginal group



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

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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 24,000 households

Target Group Survey

1000 traveling households, each

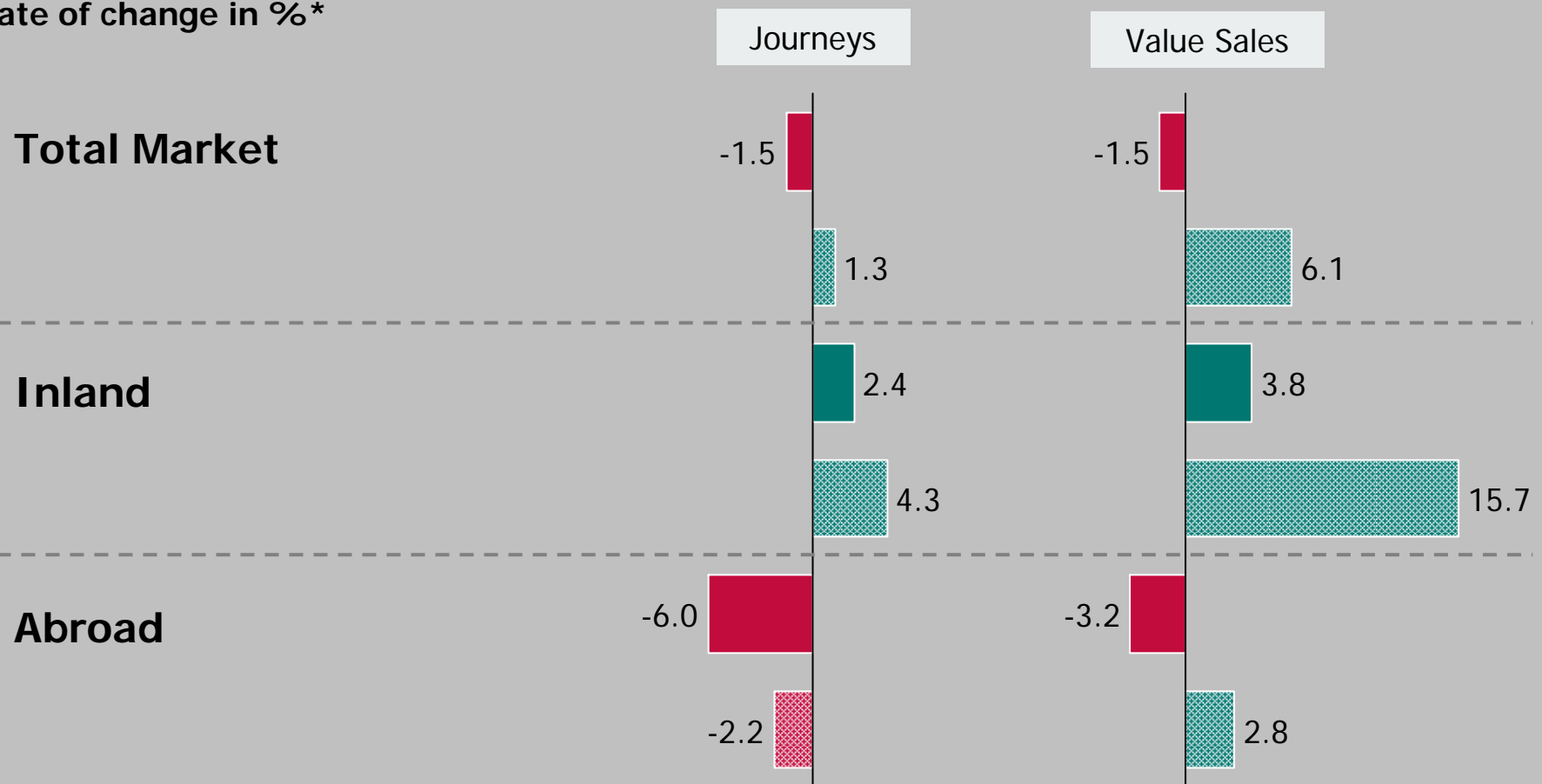
Topics: Demands on CSR and assessment of

- Tour operators
- Transport services
- Tourist regions

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

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Rate of change in %*



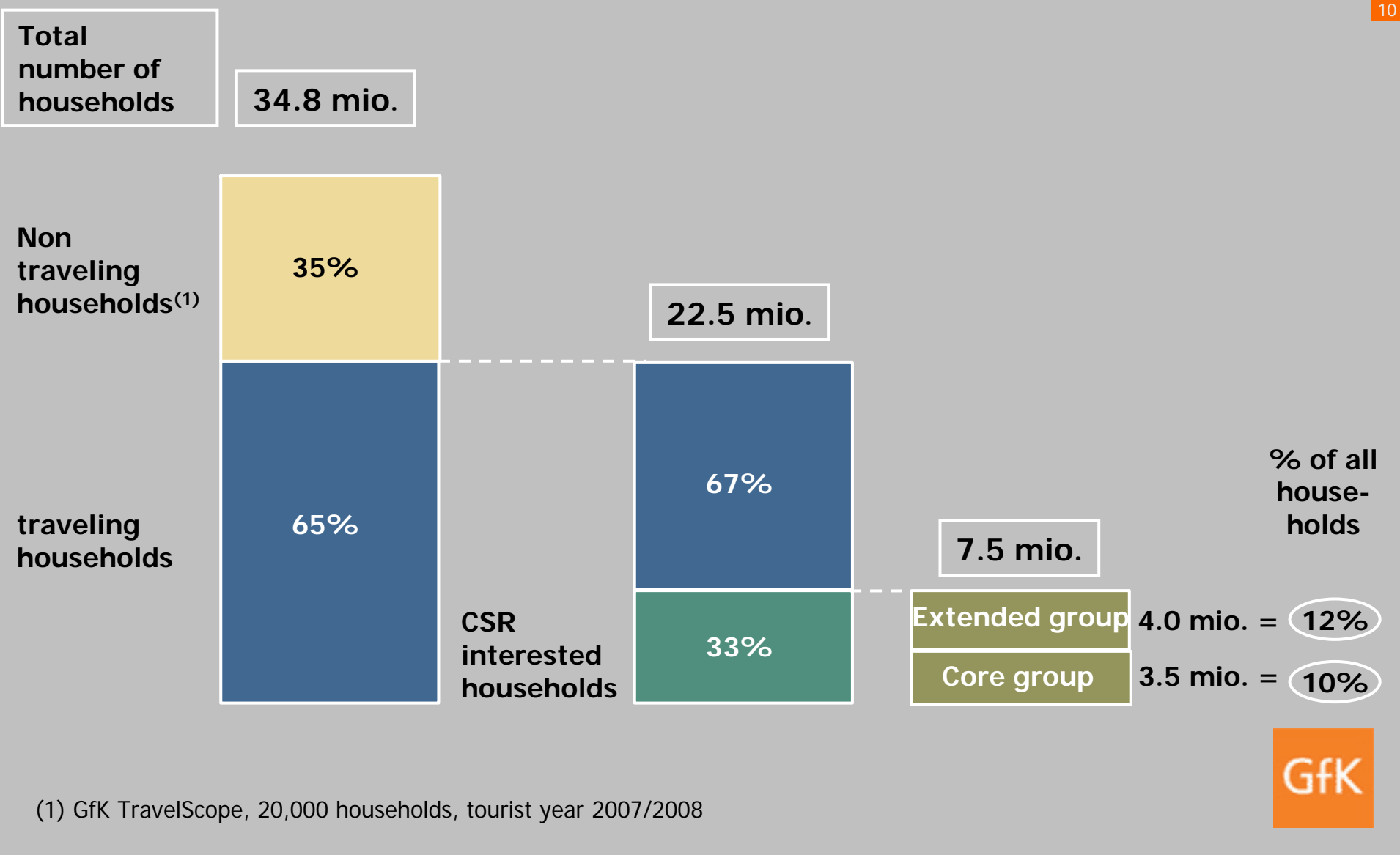
*tourist year 2008/2009 vs. 2007/2008

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



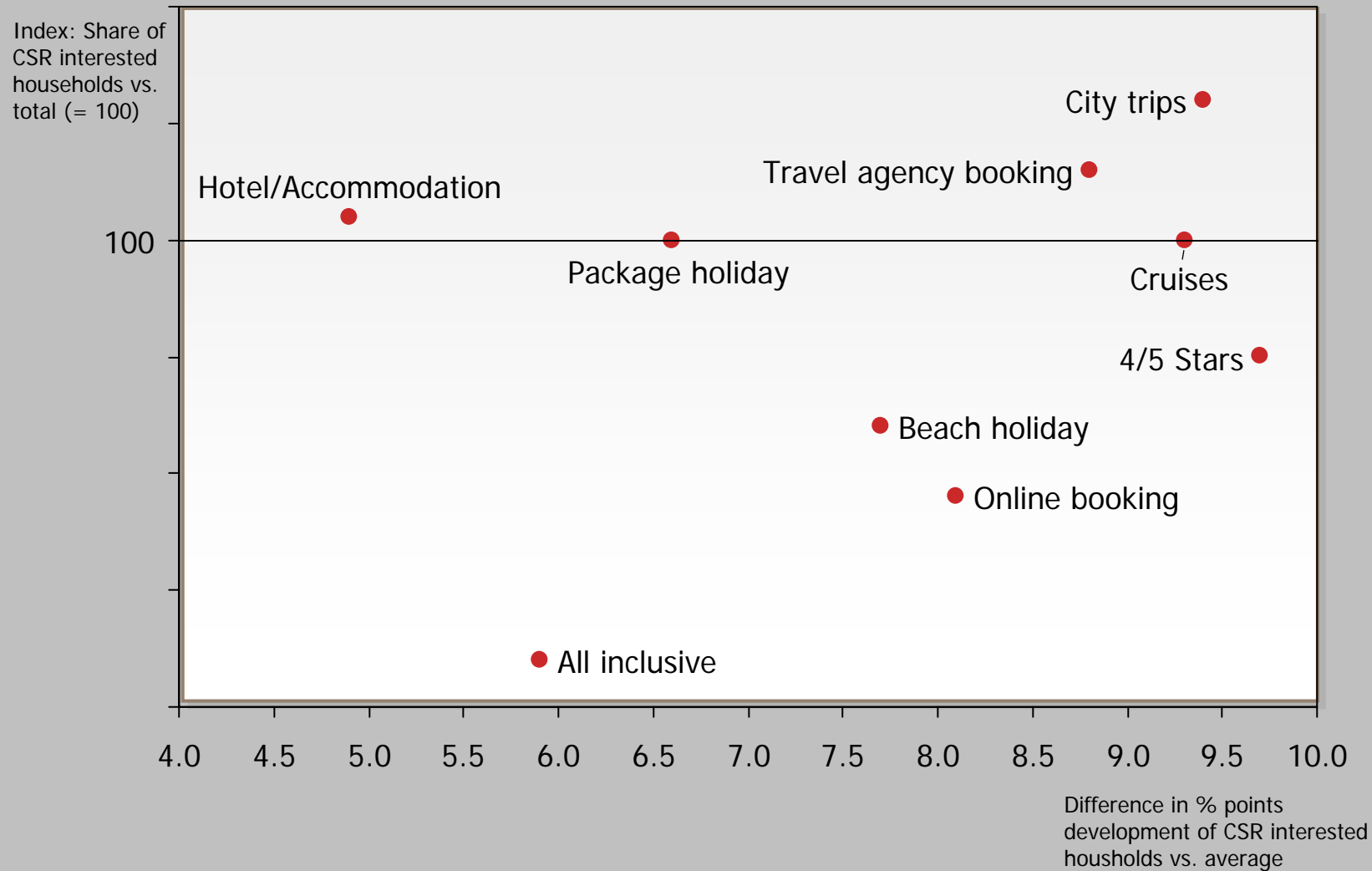
Quantification:

Almost Every Fourth Household Open-Minded for Ecological and Humanitarian Responsibility



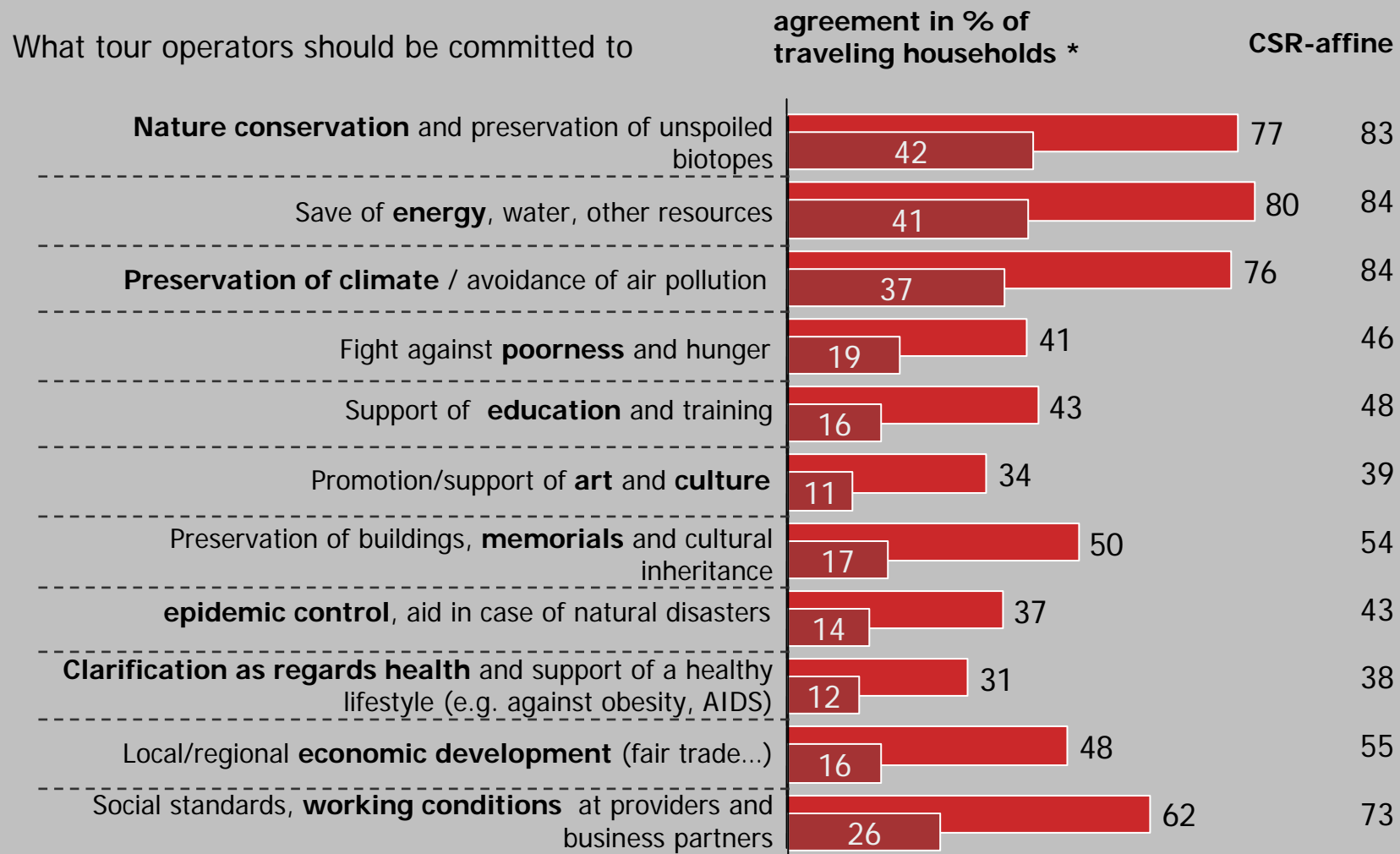
Segments in which CSR-affine households showed an above average growth

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

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* Topboxes (4/5)

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




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

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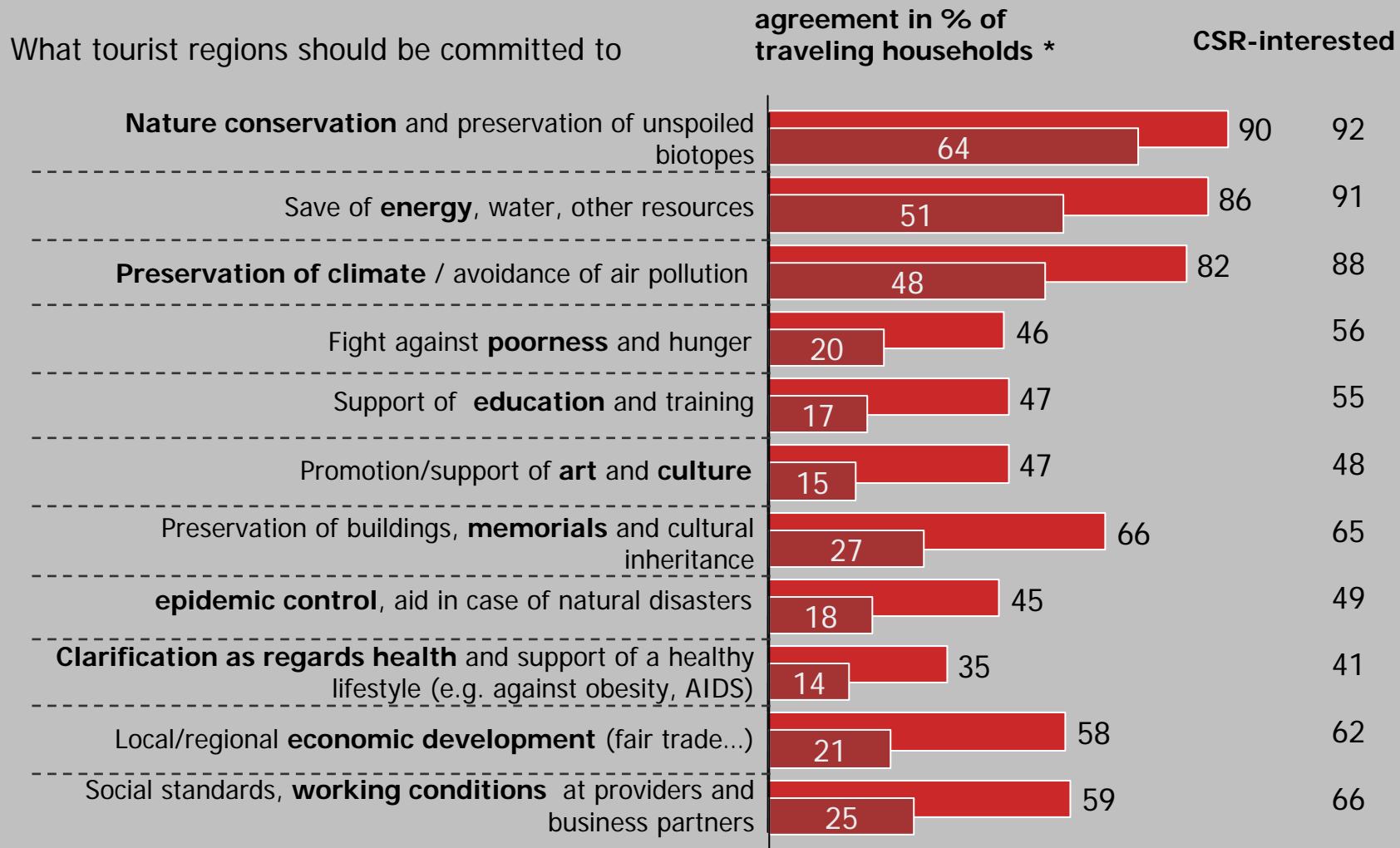
* Topboxes (4/5)

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




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 TrvelScope panelists, Dec. 2009

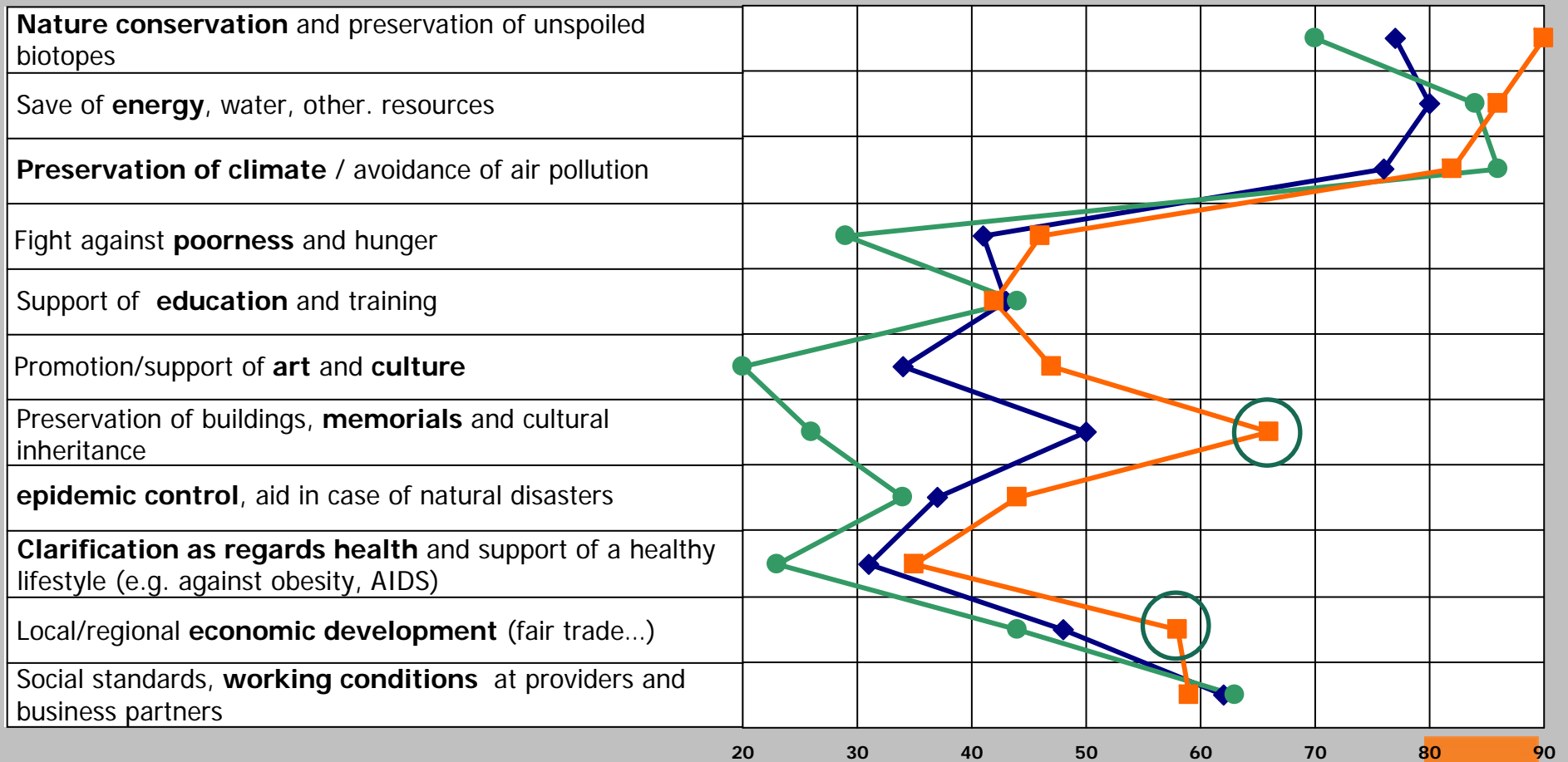



The greatest demands are placed on tourist regions in general

Top box 4/5

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◆ 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		Tour operator	Transport services	Tourist regions
30	Nature conservation and preservation of unspoiled biotopes	30	12 (15)	48
22	Preservation of climate / avoidance of air pollution	15	41	10
18	Save of energy, water, other. resources	16	23	15 (13)
10	Social standards, working conditions at providers and business partners	14 (22)	9	6 (8)
6	Fight against poorness and hunger	7	4	6
4	Preservation of buldings, memorials and cultural inheritance	5	1	5
4	Local/regional economic development (fair trade...)	4	3	3
3	Support of education and training	4	4	2
1	Promotion/support of art and culture	2	1	1

() = CSR-interested

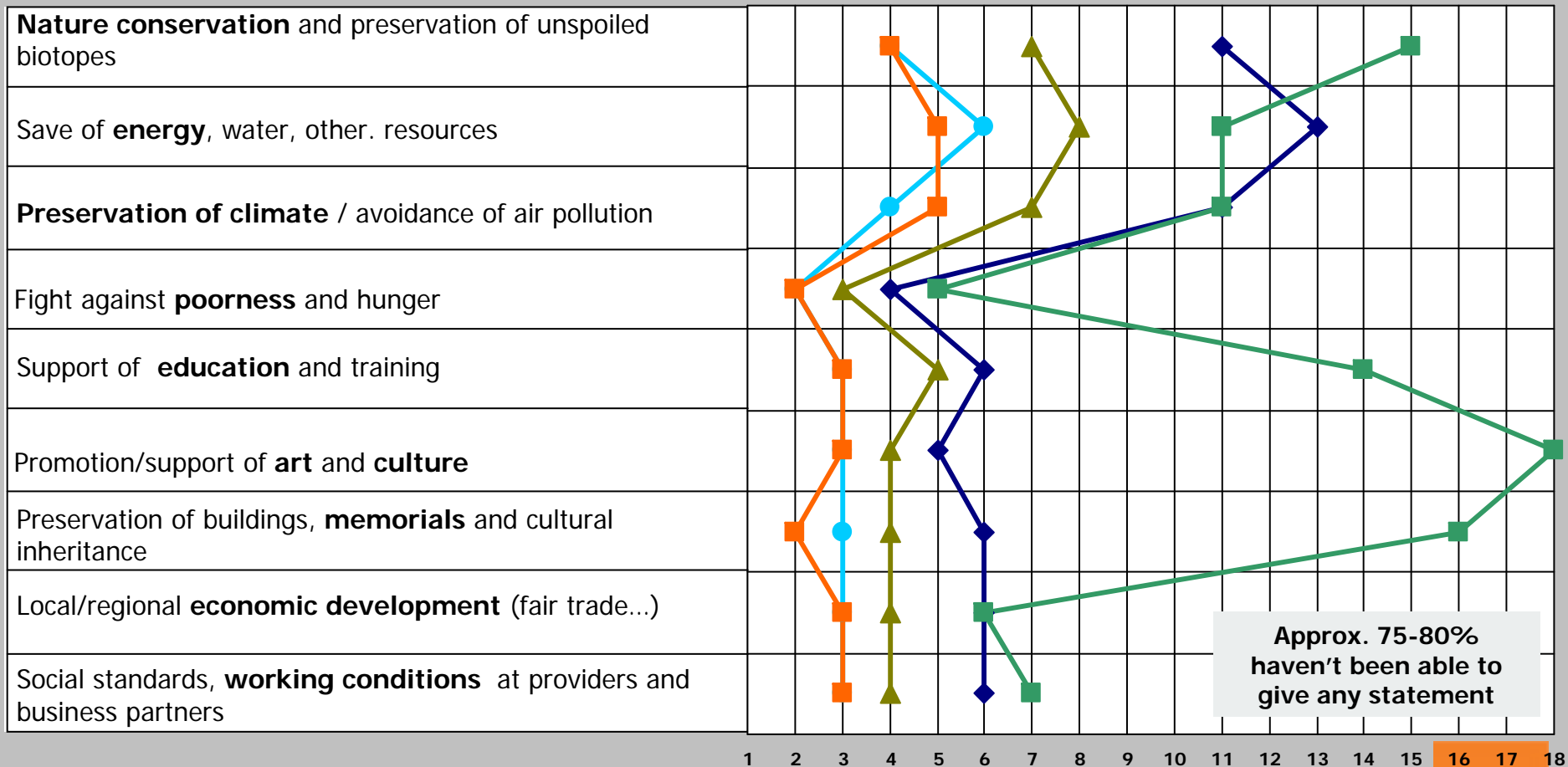
The big tour operators do not have any CSR related image, yet

Image of tour operators in terms of CSR

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

◆ TUI ● Alltours ■ ITS ▲ Neckermann ■ Studiosus

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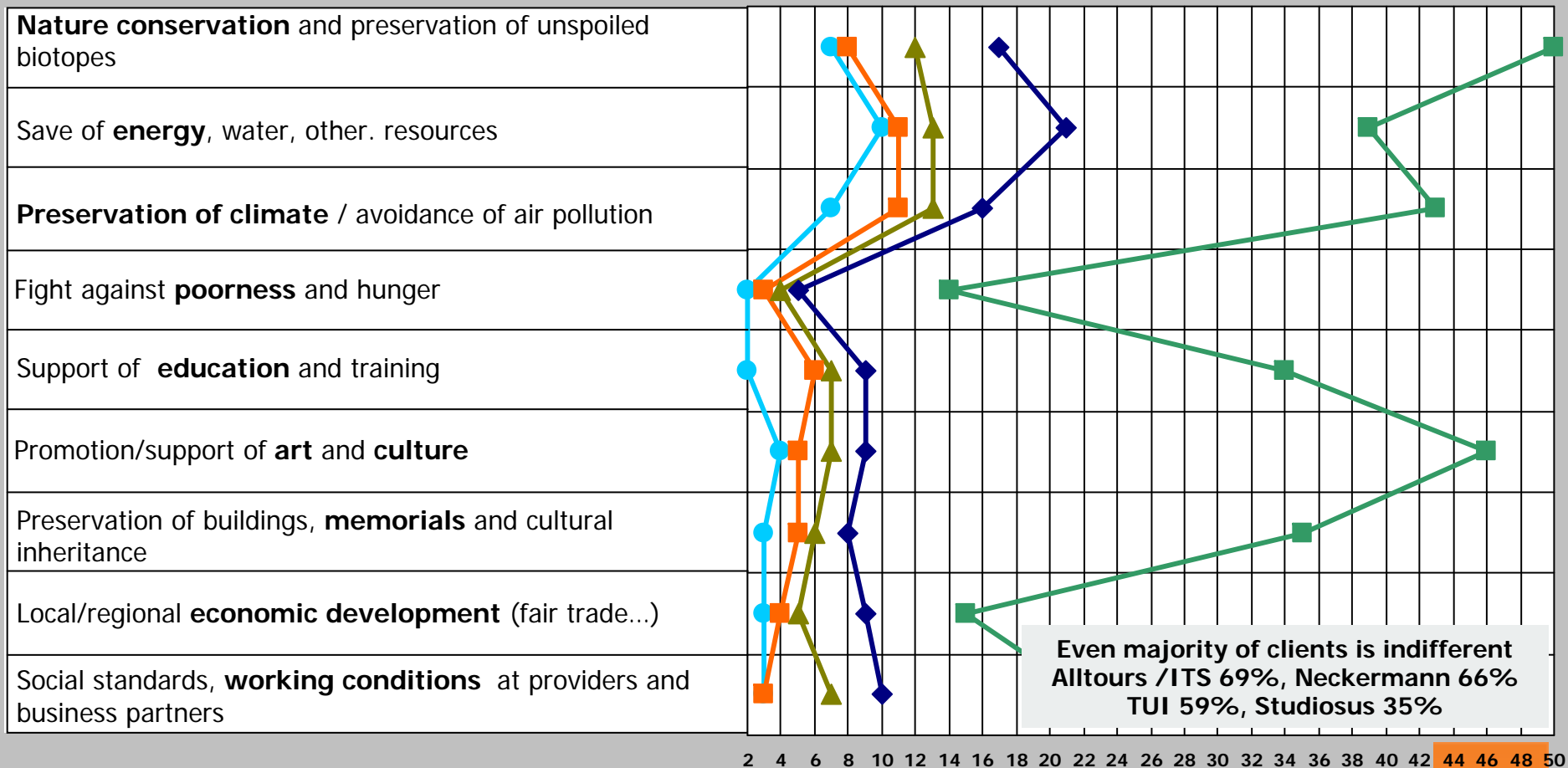
Approx. 75-80% haven't been able to give any statement

*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 do not have any CSR related image

Image of among their clients in terms of CSR



Even majority of clients is 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

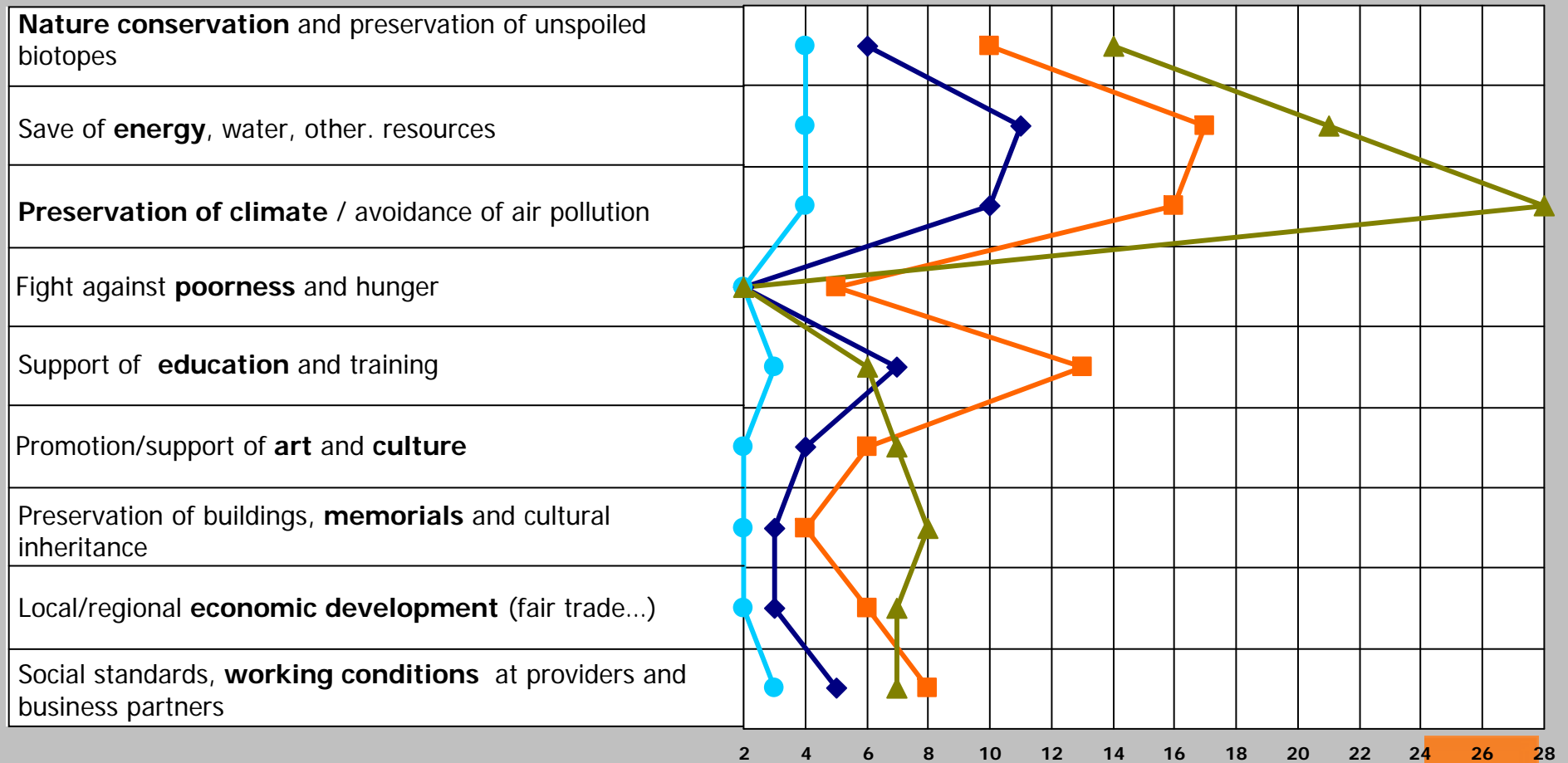
Deutsche Bahn is absolutely said to show ecological commitment, although the main part of the respondents does not have any idea, here as well

Image of transport services in terms of CSR

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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 are familiar with the name of the corresponding transport service, at least

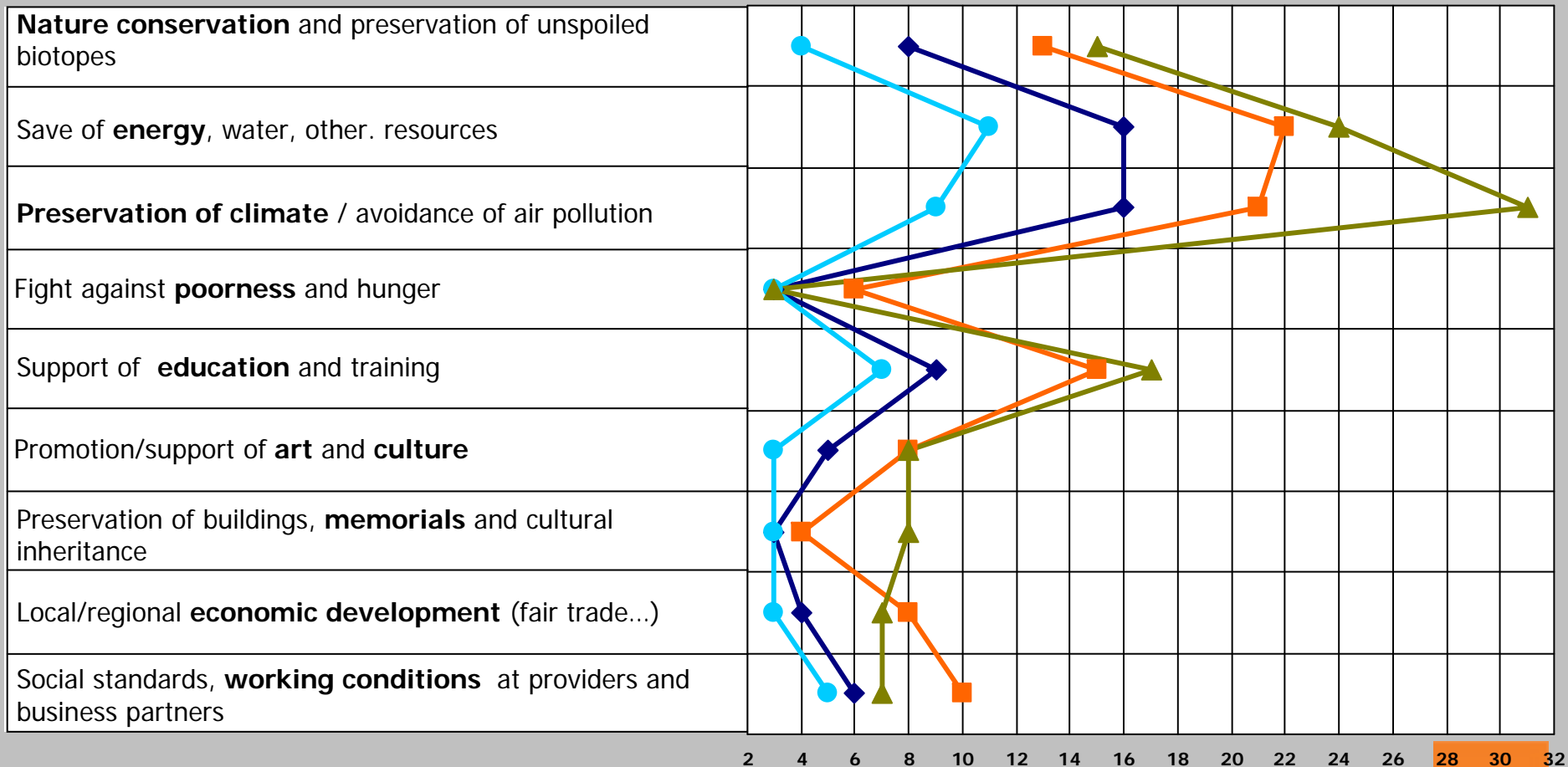
Even among their clients, airlines do not have any CSR related image

Image of transport services in terms of CSR

20

("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

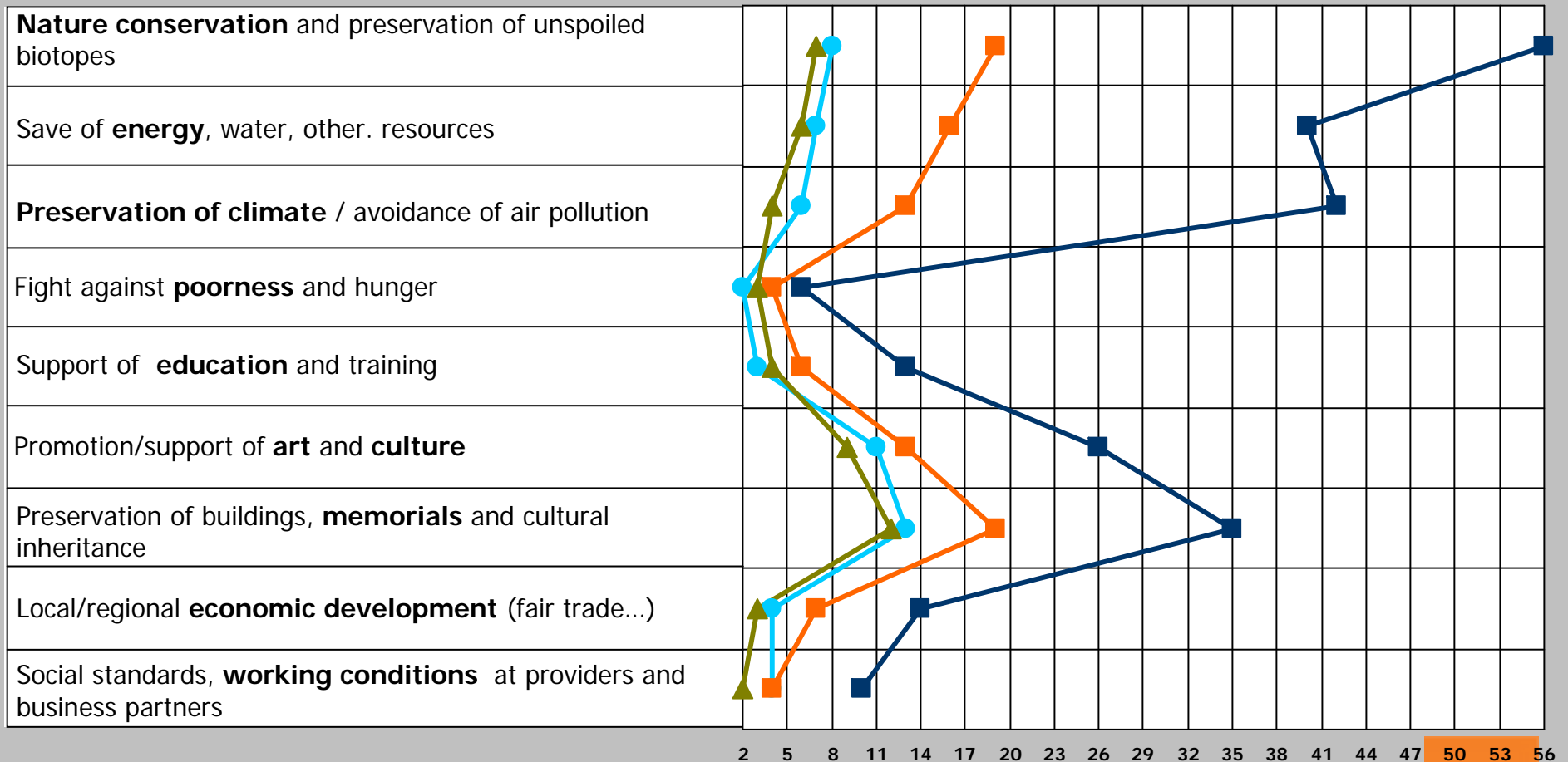
The North Frisian have an distinctive ecological image

Image of tourist regions in terms of CSR

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("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



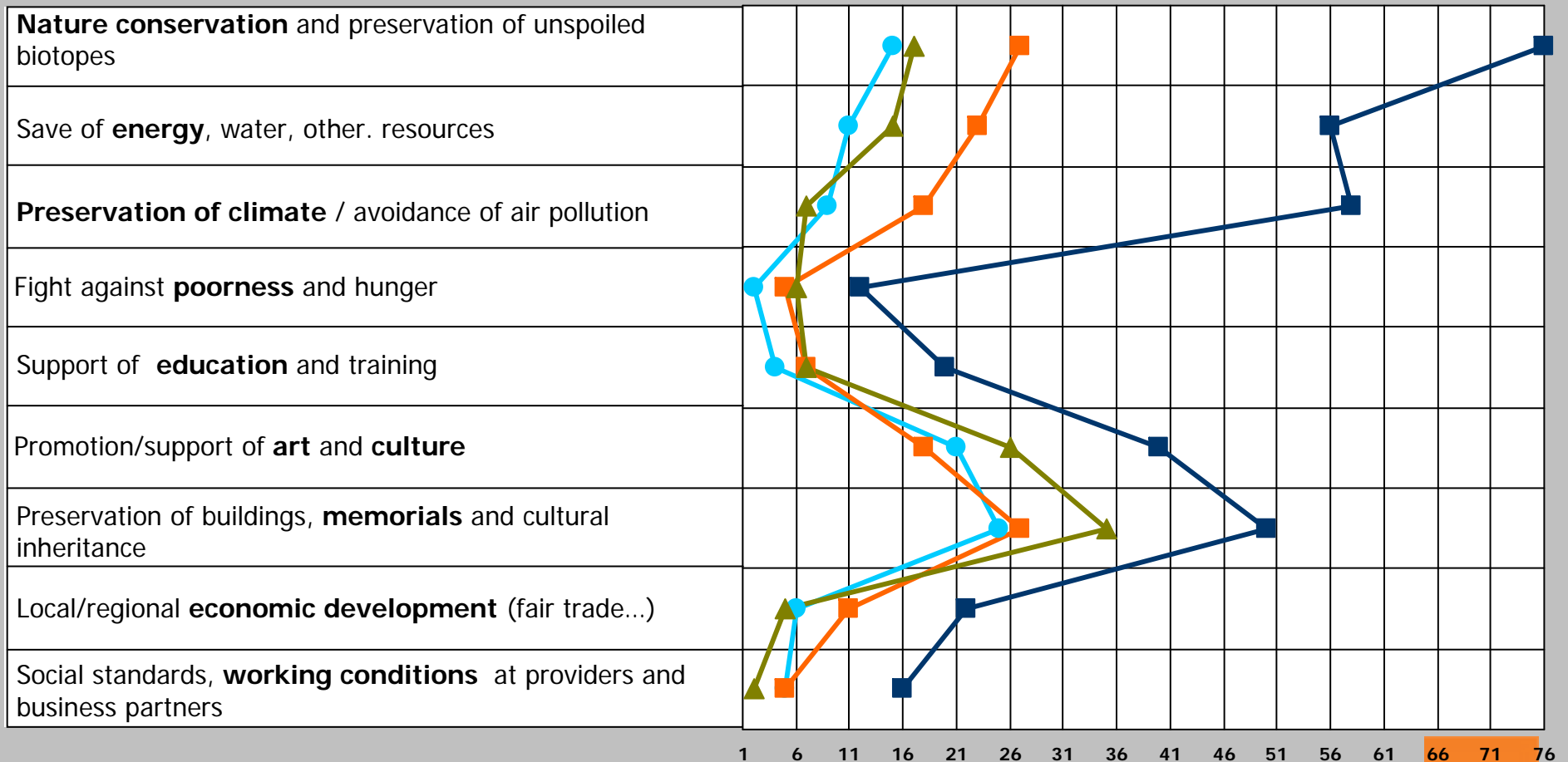
While the North Frisian Islands achieved to convince their visitors by their ecological activities, other regions are said to be mainly focused on cultural inheritance

Image of tourist regions in terms of CSR

22

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

Adriaküste Mallorca Rotes Meer Nordfr. Inseln

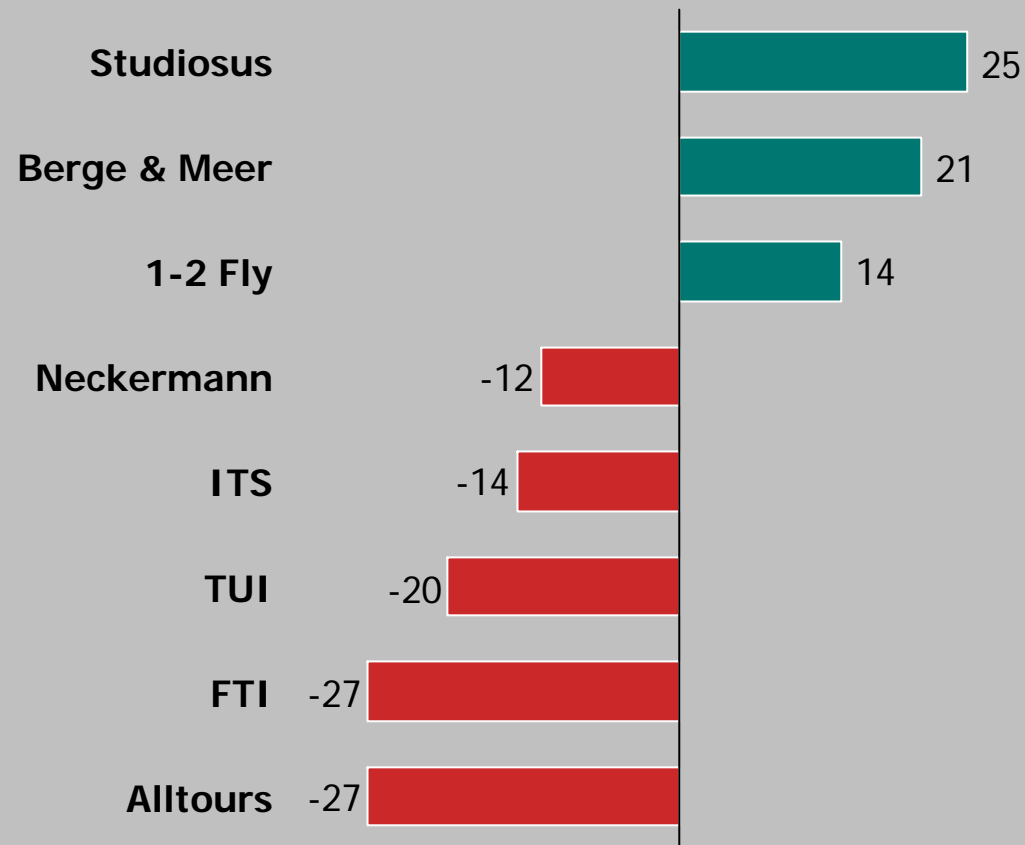


*Agreement (top box 4/5) in %

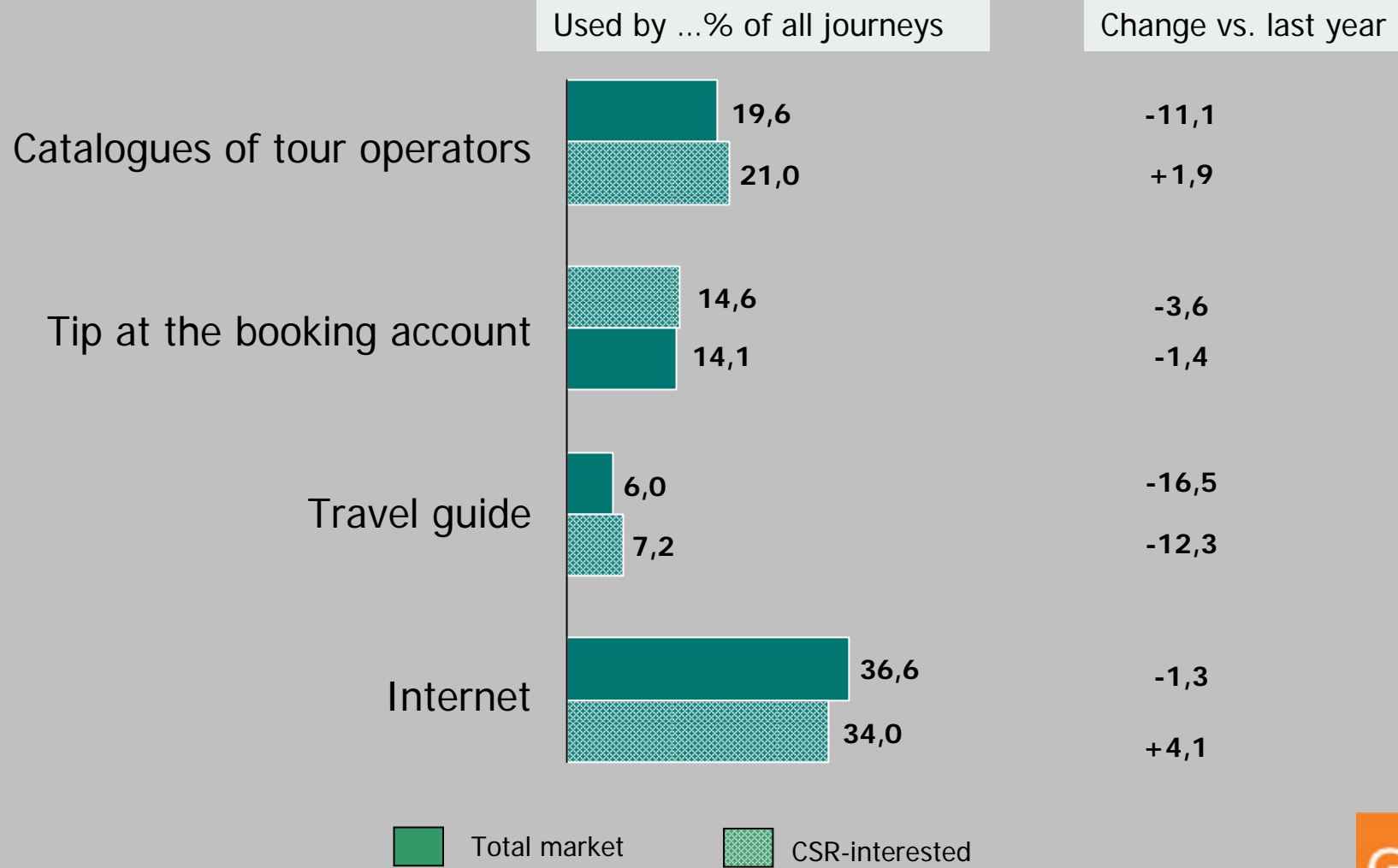
Base: households that already visited with the corresponding tourist region

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

Tour operators that have been disproportionately little or rather often booked by households with high interest in CSR*



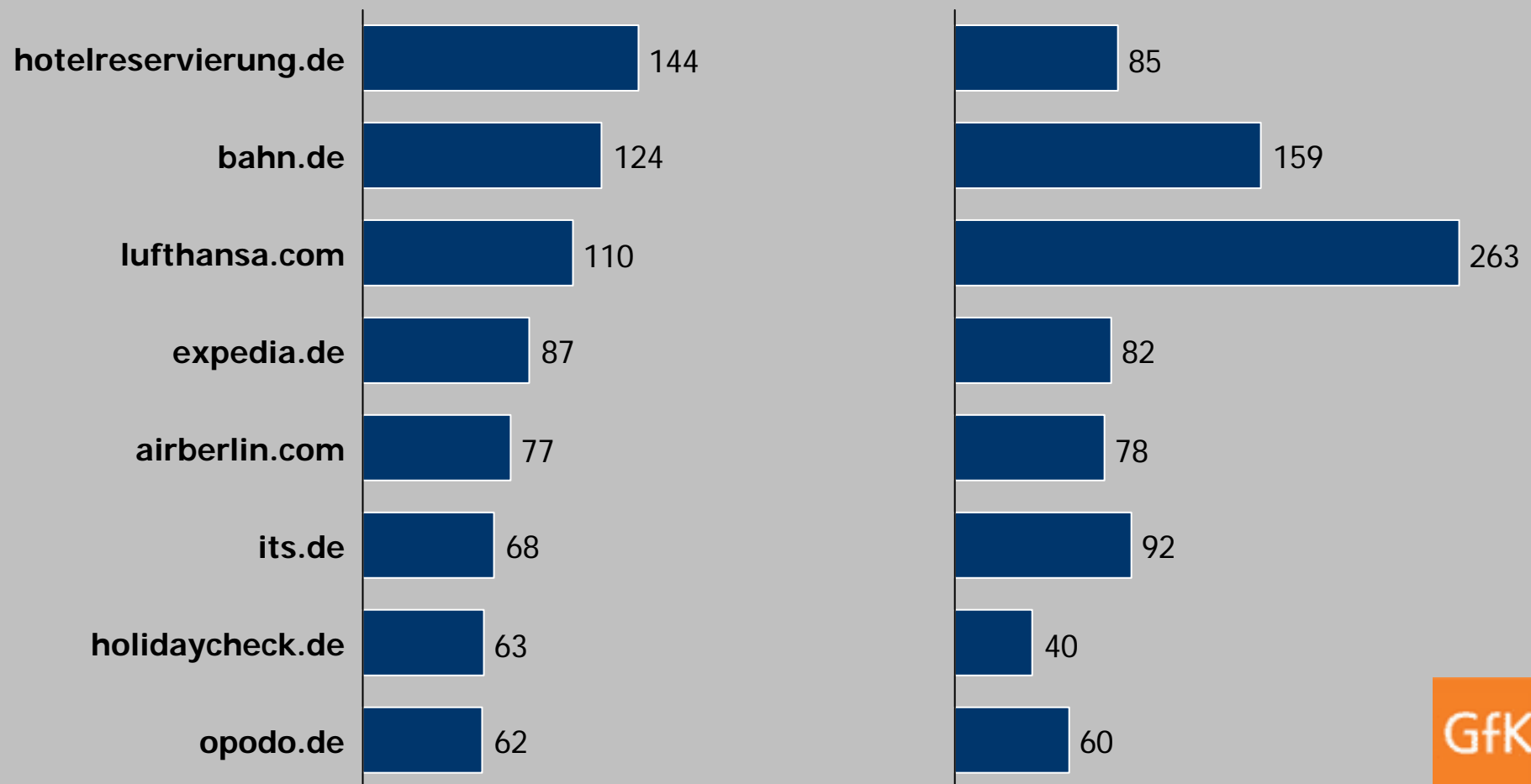
Source of information for pre-booked journeys



CSR-interested

Index Reach

Index Duration/Person



**Thank you very much for your
attention**

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