



@Dialego

Traveling with Discount Shops

A Survey by Dialego

February 2008

June 2010

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■ Background to the Survey:

- The aim of the survey was to discover how the interest in and evaluation of traveling with discount shops has evolved during the last two years.

■ Procedure:

- Online survey in Germany with a total of 1,000 interviews
- The survey participants were selected from the Dialego Access Panel according to gender and age
- Participants received an invitation by personalised e-mail which included a hyperlink to the survey
- The sample was quoted according to age and gender variables as per the German population (micro census)

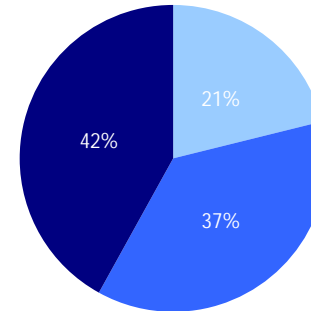
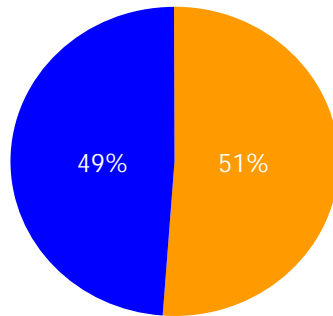
■ Field Time:

- Start: 15 February 2008 14 June 2010
- End: 22 February 2008 21 June 2010

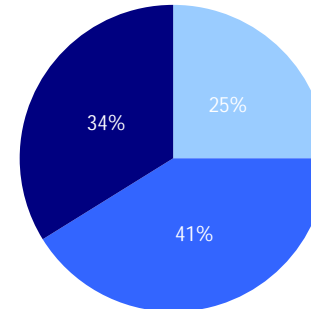
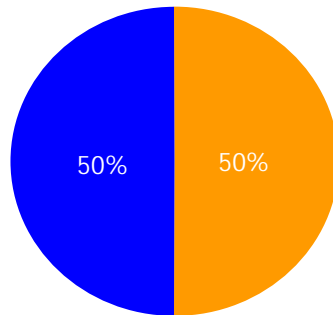
Gender

Age

2008



2010



■ Men
■ Women

■ 14-29 years
■ 30-49 years
■ 50-69 years*

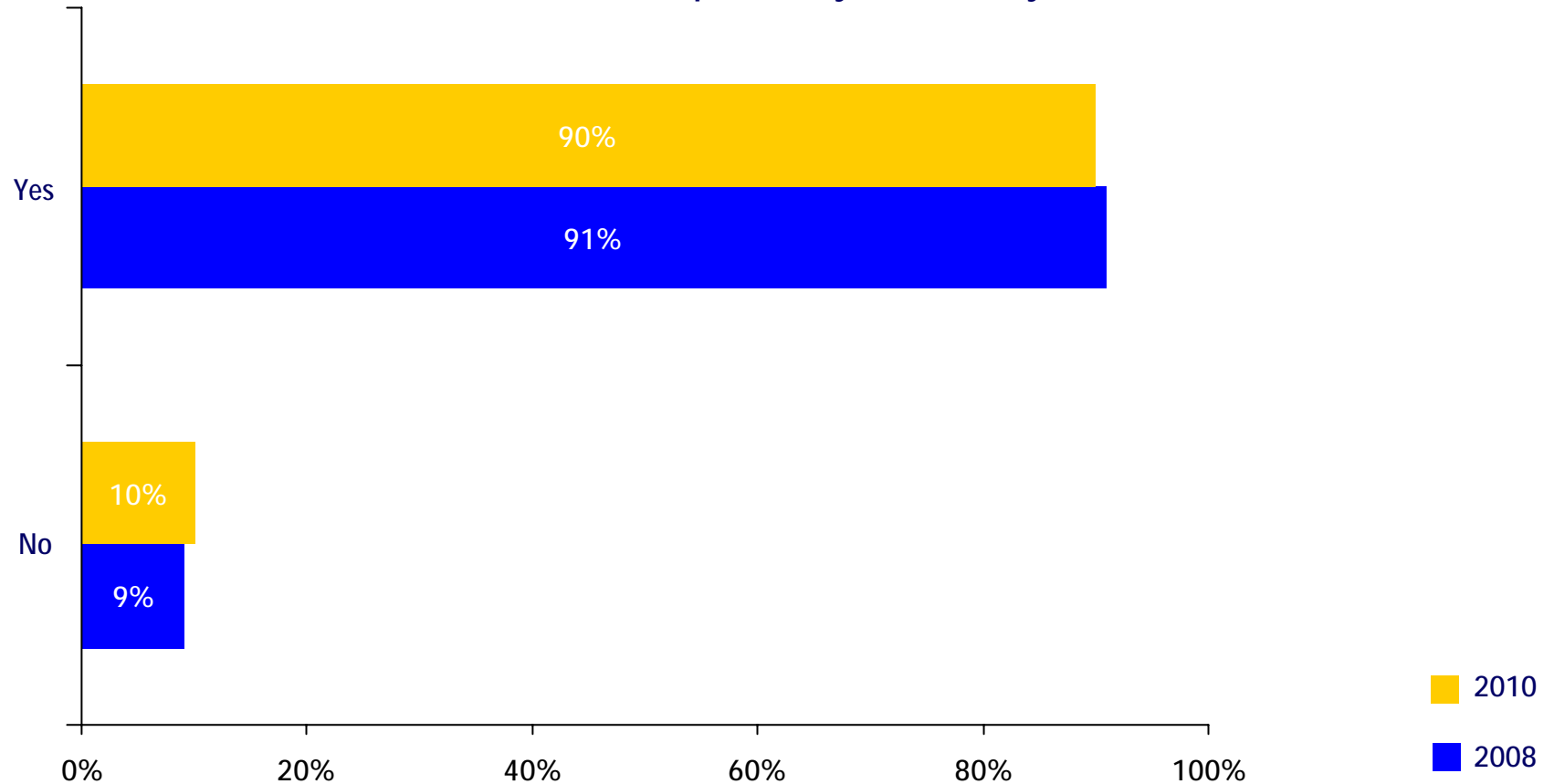
Base: n = 1,000 participants

* In the course of the survey, the information collected in 2008 was weighed. Then the age group „70 years and older“ took part in the survey, too.

Individual Offers

Split According to Years

Have you ever heard about travel offers of discount shops, have you seen any brochures etc.?



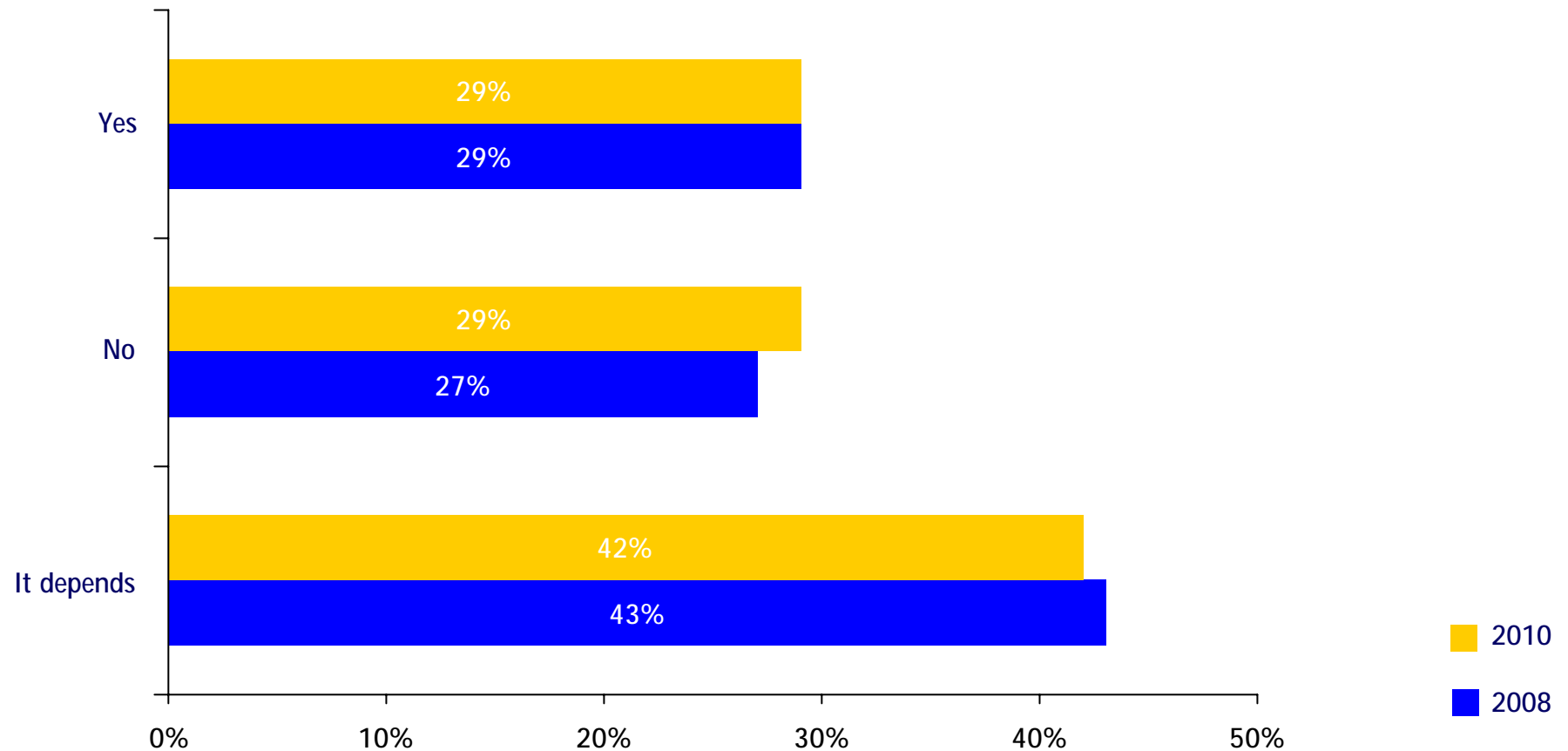
Base: n = 1,000 participants each

The awareness level of discount shops as tour operators consistently remains at a very high level.

Discount Shops as Tour Operators

Split According to Years

Would you consider a discount shop as a reliable tour operator?



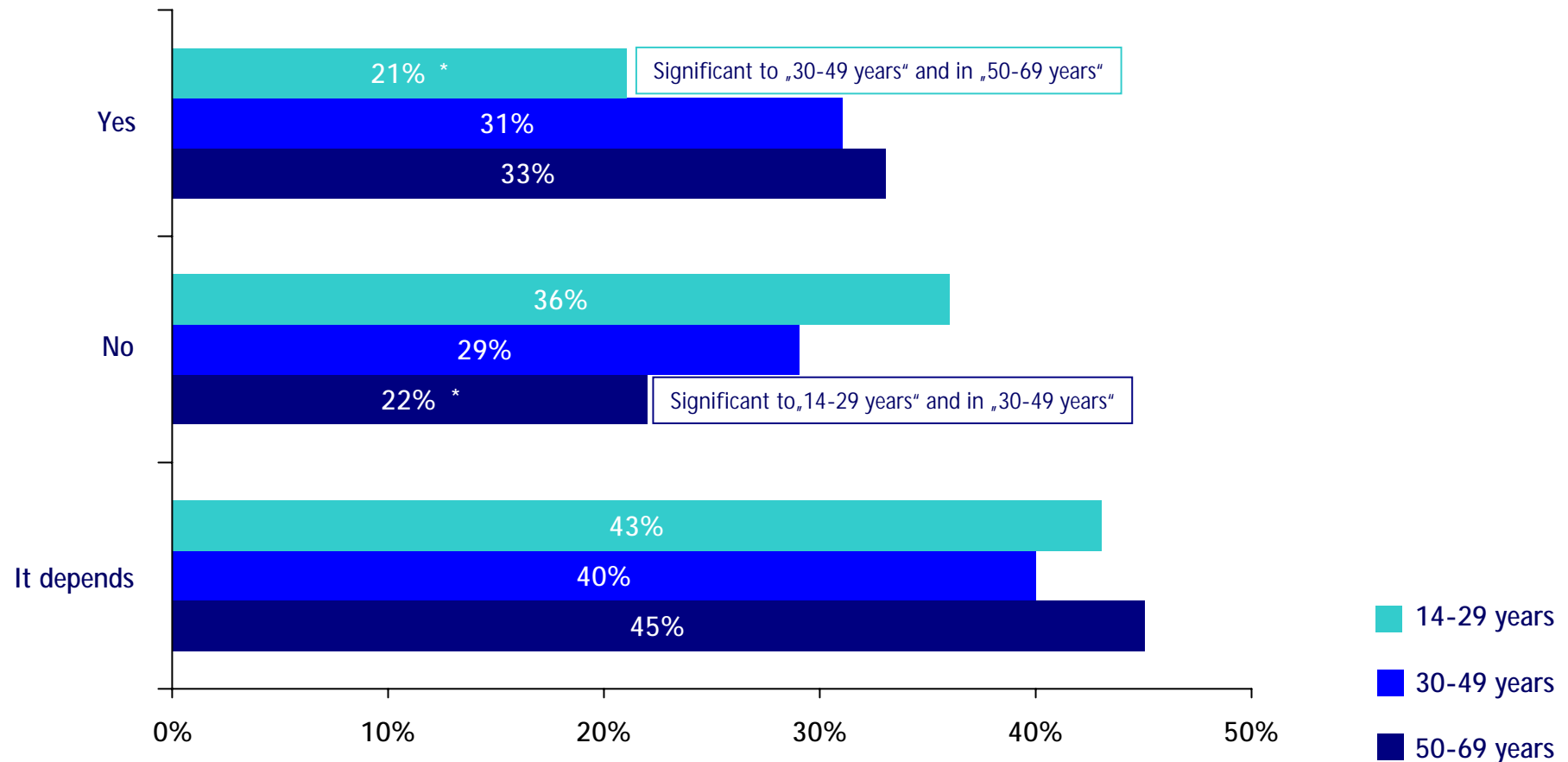
Base: n = 1,000 participants each

Nearly a third of the consumers still regards discount shops as reliable tour operators.

Discount Shops as Tour Operators

Split According to Age 2010

Would you consider a discount shop as a reliable tour operator?

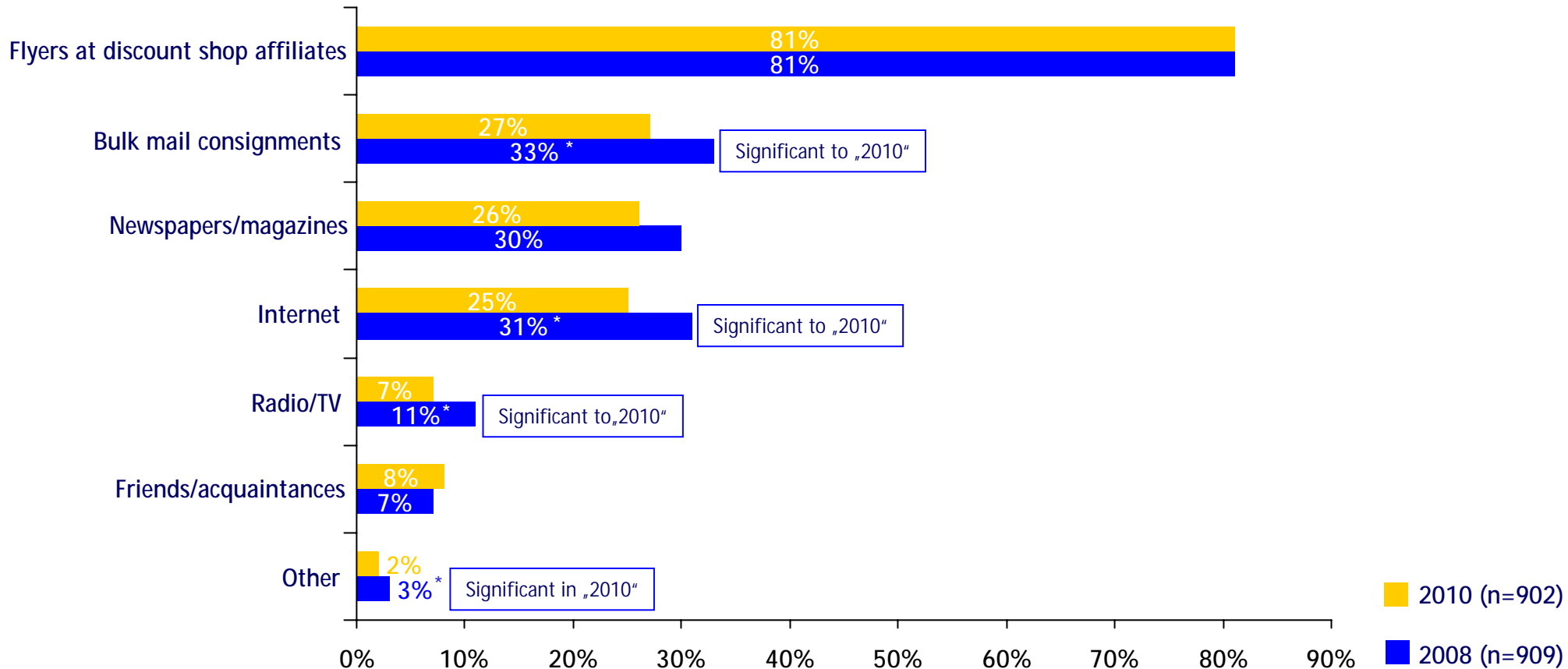


Base: n = 1,000 participants each

The older the consumers, the higher their trust in discount shops as tour operators. Discount shops surely appear more attractive as tour operators to the older consumers than to the younger ones.

* The asterisk signifies that the value is significantly higher on a 95 percent level.

Where have you noticed travel offers from discount shops?



Base: n = see right, those who have already heard of travel offers from discount shops; multiple answers possible

Apart from flyers at discount shop affiliates, the perception of advertisements for traveling with discount shops has significantly decreased.

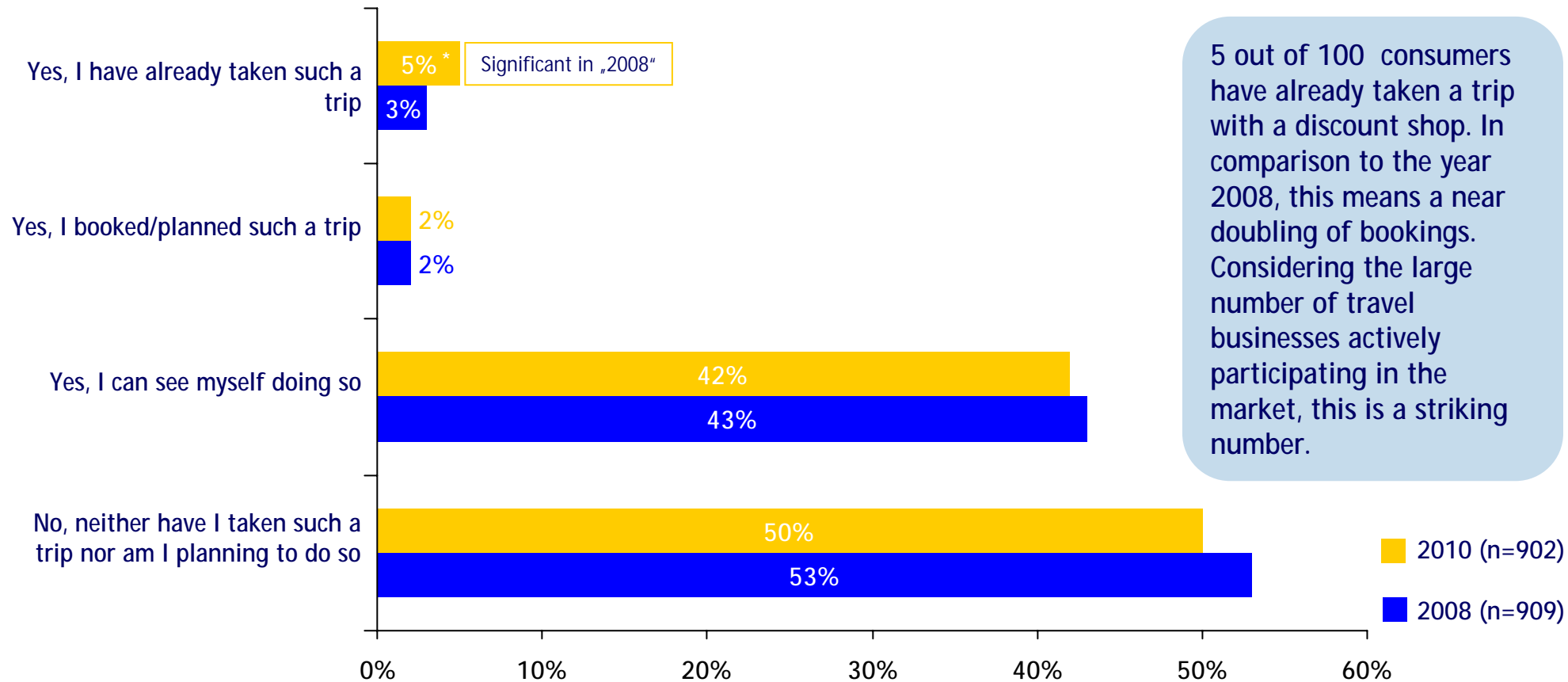
* The asterisk signifies that the value is significantly higher on a 95 percent level.

Booking at Discount Shops

Split According to Years

Traveling with Discount Shops

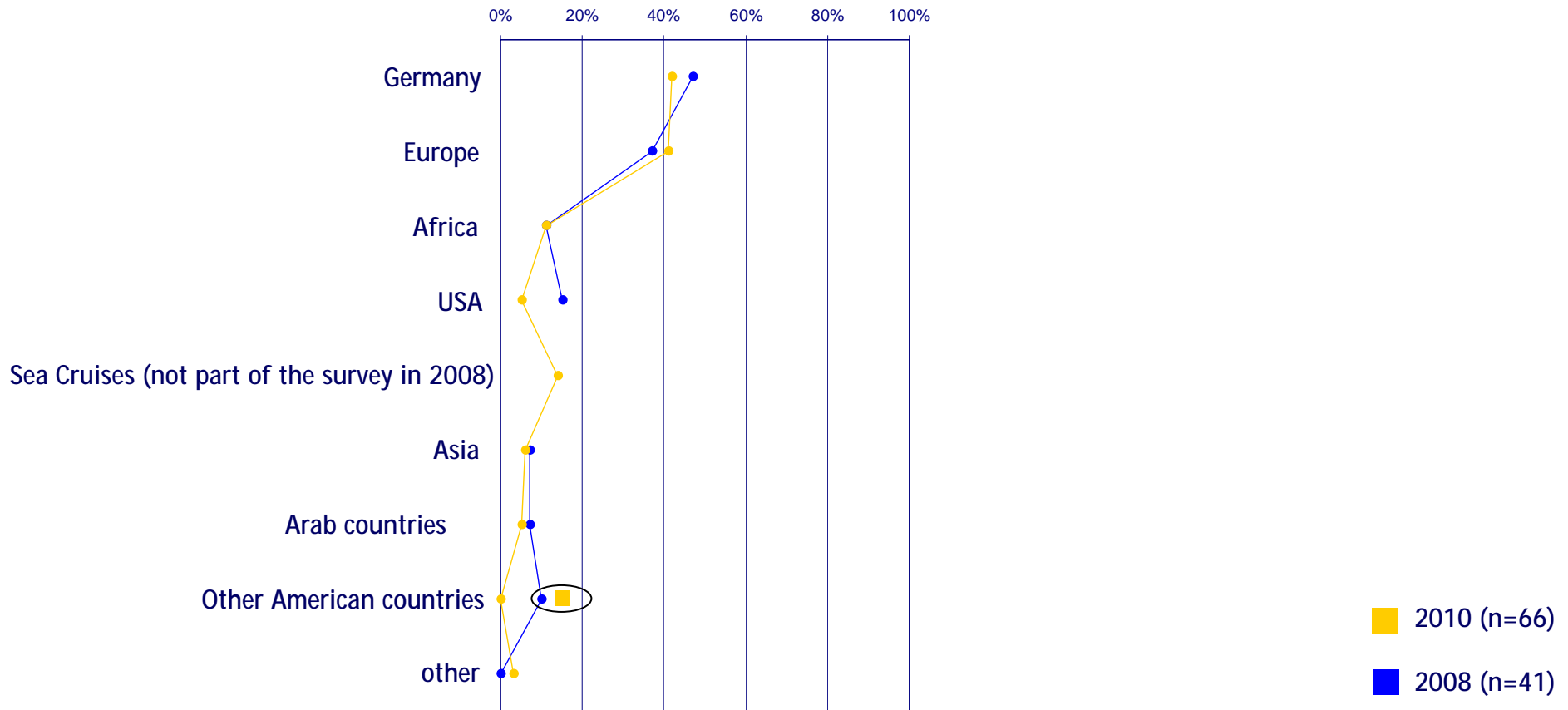
Have you ever booked a trip at a discount shop or could you see yourself doing so?



Base: n = see right, participants who have already heard of travel offers from discount shops

* The asterisk signifies that the value is significantly higher on a 95 percent level.

Where do you travel or plan to travel with the discount shop as tour operator?

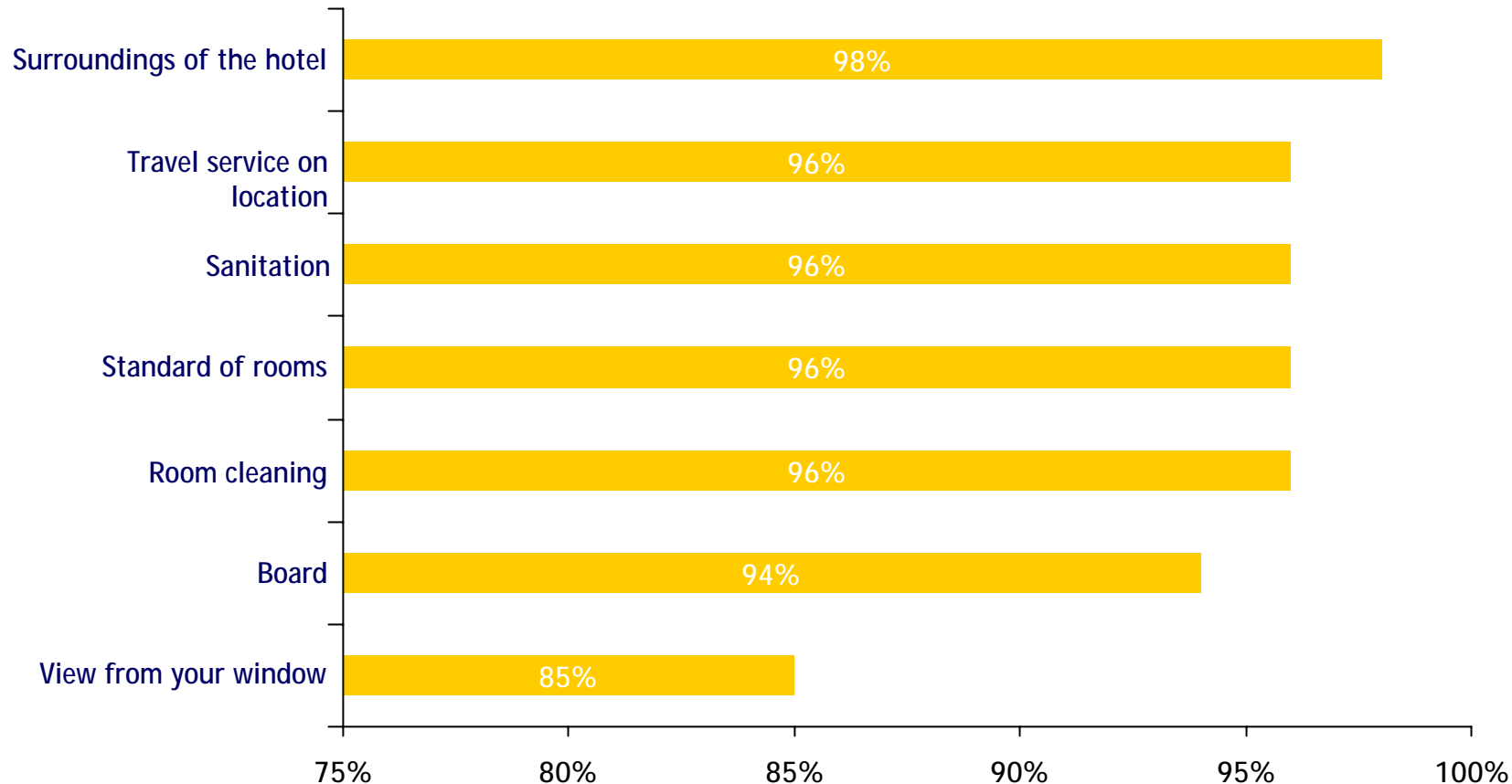


Base: n = see right, participants who booked/planned a tour with discount shops; multiple answers possible

Still Germany and other European countries are the preferred travel destinations when traveling with discount shops.

□ A box shows that the value is significantly higher on a 95 percent level. The colour of the box indicates its significance.

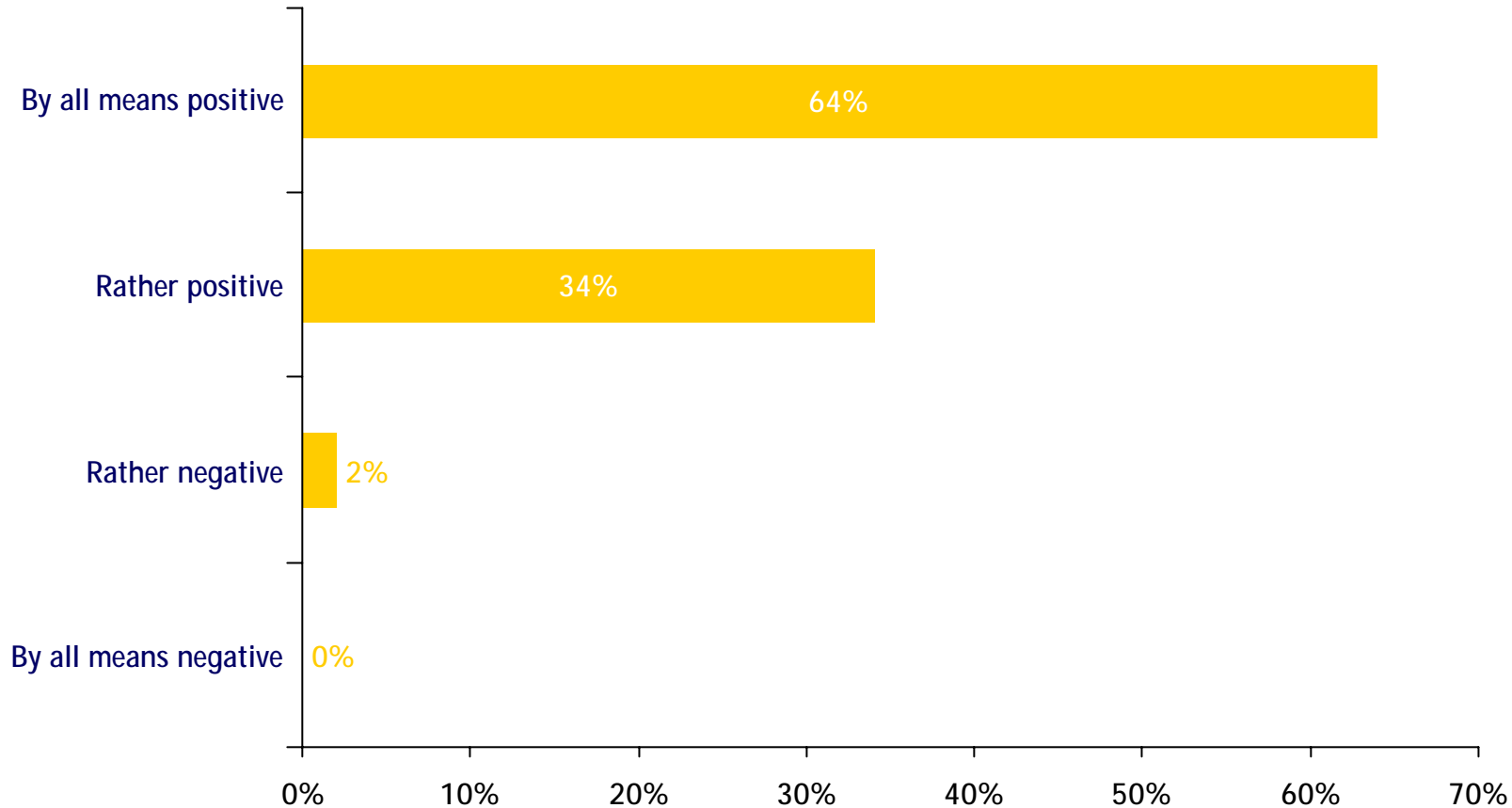
To which degree were you satisfied with the following conditions at the resort?



Base: n=47 participants in 2010, who already went on vacation with a discount shop; only top2-mentions on a scale from 1= „very satisfied“ to 4= „very dissatisfied“

The satisfaction of consumers who have already travelled with discount shops is surprisingly high. In almost all cases it nearly reaches 100 percent.

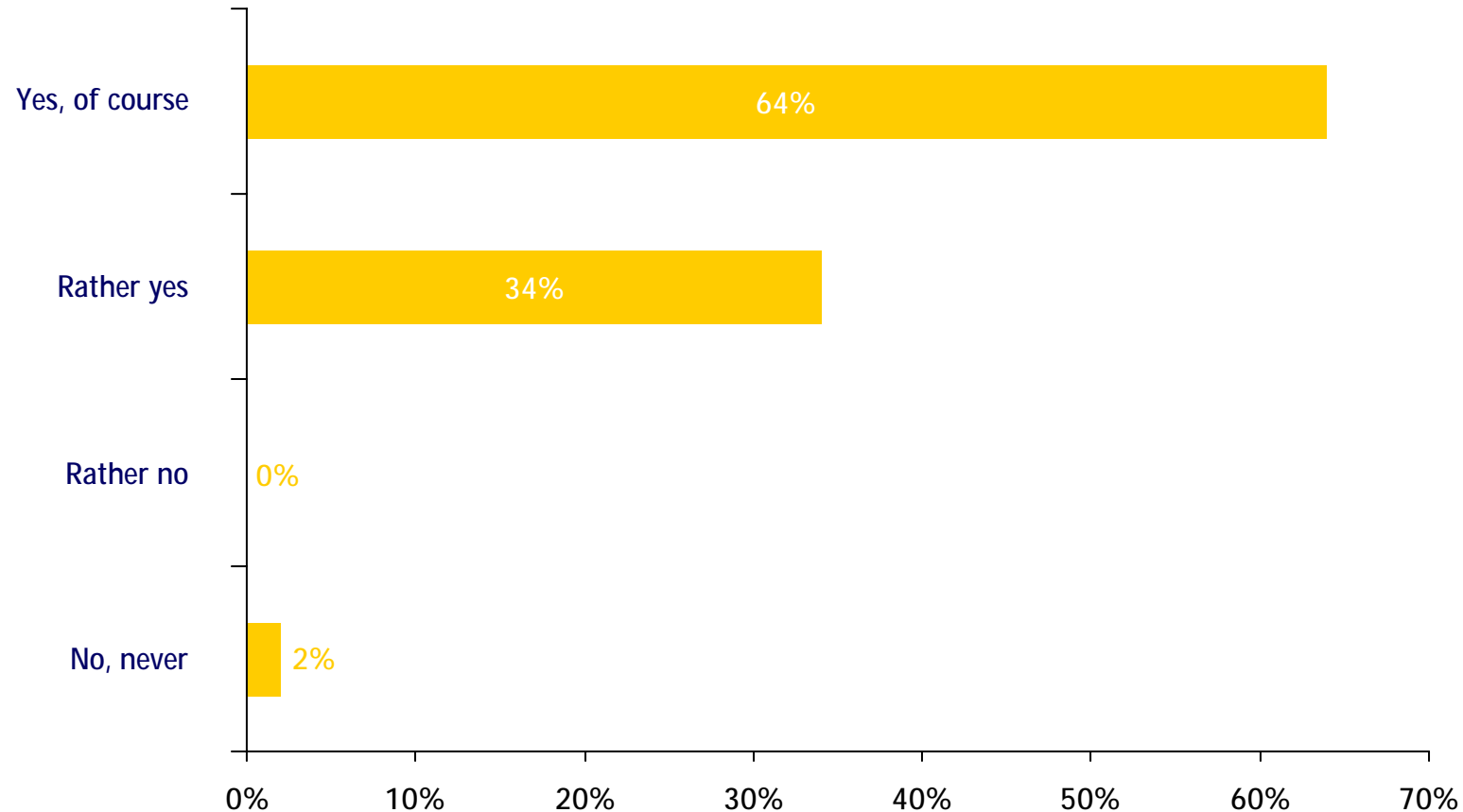
How would you all in all evaluate the cost-performance ratio of your trip with a discount shop?



Base: n=47 participants in 2010, who already went on vacation with a discount shop

Cost-performance ratio is equally hard to beat.

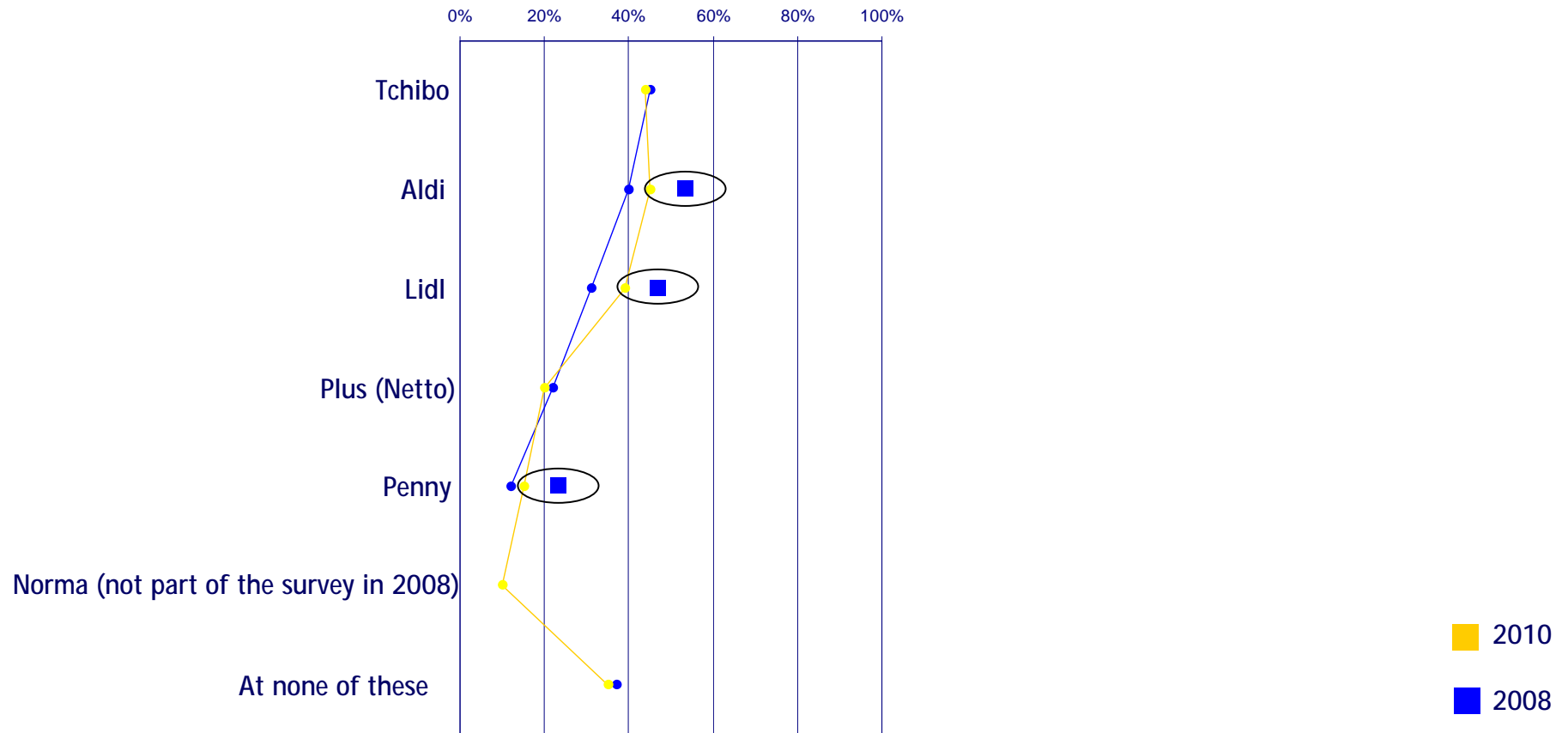
Would you book a trip at a discount shop again ?



Base: n=47 participants in 2010 who already went on vacation with a discount shop

Nearly everyone who went on vacation with a discount shop once would do it again.

At which discount shop could you imagine yourself booking a trip?



Base: n = 1,000 participants; multiple answers possible

In 2008, Tchibo undisputedly ranked first, during the last two years Aldi and Lidl have caught up.

□ A box shows that the value is significantly higher on a 95 percent level. The colour of the box indicates its significance.

Traveling with Discount Shops

The bookings of trips with discount shops have nearly doubled over the last two years (2008 – 3 percent, 2010 - 5 percent). 5 out of 100 participants have already been on such a holiday. A remarkable number showing that many tour operators are fighting for their share in the travel market. Furthermore, consumers who have already been on such a trip are exceedingly satisfied with the services. In nearly all cases, such as board, travel service or sanitation at the hotel etc., customer satisfaction reaches maximum values.

The evaluation of the cost-performance ratio shows similarly high values (64 percent – by all means positive and 34 percent – rather positive). Two thirds of the consumers would in any case again take a trip with a discount shop, a result which does not surprise at all.

Traveling with discount shops has consolidated over the last two years. Despite the perception of a decrease in advertising for traveling with discount shops in the course of the last two years, the number of bookings has actually increased. The perception of advertisements at the respective shops though rests at a level of 81 percent, but in case of direct mail advertising, newspapers/magazines, internet, radio/TV it has significantly decreased. The awareness of discount shop in 2008 was already as high as in 2010 (90 percent each).

When it comes to popularity there has been a lot of change in the last two years: While in 2008 Tchibo ranked first as the most popular tour operator (2008 - 45 percent , 2010 – 44 percent), Aldi (2008 - 40 percent , 2010 – 45 percent), and Lidl (2008 – 31 percent , 2010 – 39 percent) have clearly caught up in 2010. Now Tchibo and Aldi share the first position in the ranking. Lidl ranks second, but also Penny now ranking fourth has caught up (2008 – 12 percent , 2010 – 15 percent).

Considering the chosen travel destinations no significant changes can be detected since 2008, European destinations are still most popular. 44 percent travel within Germany and 39 percent within other European countries with discount shops as tour operators. When it comes to traveling overseas, the rate decreases to values around 10 percent or less. Sea cruises, which were part of the survey for the first time in 2010, score 14 percent straightaway.

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