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Tui Northern Europe

# TUI Northern Europe



<b>Customers</b>	<b>7.5 million</b>
<b>Bed Nights</b>	<b>42 million</b>
<b>Aircraft</b>	<b>91</b>
<b>Destinations</b>	<b>107</b>
<b>Shops</b>	<b>1,076</b>
<b>Call Centres</b>	<b>5</b>
<b>Colleagues</b>	<b>20,000</b>

# To the Caribbean



Customers	260,000
Bed Nights	2.8 million
Destinations	12

## Economy

- Global crisis
- Fluctuating fuel prices
- Fluctuating exchange rates

## Industry

- Consolidation of major tour operators
- Removal of many small and mid size players in the market
- Sharp downturn in sale for new online players

## Consumer

- Huge personal debt
- Little economic confidence
- Looking for value in all aspects of spend

# The reaction




- Customers are looking to book closer to departure
- Over supply of new 4 and 5 star properties are bringing prices down
- The Spanish hotel chains have brought massive economies of scale





# Products



- Significant growth in the sale of value all inclusive
  - Significant growth in non euro and dollar destinations
  - In uncertain times people travel with brands they trust
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- A background image showing a tropical sunset with silhouettes of palm trees against a bright orange and yellow sky.

The future







More Range ... More Destinations  
... More Choice ...



## Today's Leisure Aircraft

787



# Key to success

- Build long term sustainable supplier relationships
- Communicate the role and importance of charter capacity and the need to share the risk
- Understanding that the bed rates support back to back occupancy
- Quality product offering exceptional value for money
- Need to build new and differentiated product

