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EDITO

On request of campsites managers, here are statistics on 2012 sales up to January 10th 2012. Given the current economic situation in Europe, everybody feels concerned and is awaiting 2012 sales most eagerly.

In Utrecht fair, Tour Operators had different views but agreed on:

- Sluggish Dutch market ;
- Stable Danish and British markets ;
- Good German market.

Yet, when talking with campsites managers, things did not appear so clearly. Some did record good sales some didn't. Neither establishment size, destination, tariffs nor amenities provided could explain selling trends.

We turned to our sample group to try to find an explanation through actual direct sales up to January 10th but figures are indeed very inconstant.
Sales figures are available on our Facebook page on which we will discuss these issues.

Important information:

- The sample group we use is permanent and very representative to provide information about the economic situation. Let's say the information gathered from the sample group is reliable and doesn't aim at selling our services. The sample group doesn't include all Secureholiday sales, because the number of Ctoutvert users is increasing every year and would have us provide only increasing figures!
- Figures include bookings up to January 10th, which is really early and cannot be considered sufficient to give relevant trends. Another newsletter on January 31st will probably specify and clarify many issues and questions that are still pending.

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Situation on January 1st
Bookings recorded from October 1st 2011 up to January 10th 2012.

Secureholiday sample group
The sample gathers 805 establishments using Secureholiday Individual Pack on January 10th 2012 with updated tariffs for the season 2012 and that have received bookings via Secureholiday for the seasons 2010 and 2011. For the period beginning on October 1st 2011 and ending on January 10th 2012, only bookings for the season 2012 have been taken into account.
On the whole, these establishments account for 80% of Ctoutvert Secureholiday.net system.

General trends

	Evolution 2011-2012		
	Bookings	Stay	Turnover
October	20%	12%	4%
November	6%	4%	3%
December	7%	7%	7%
January	7%	5%	9%
General Total	**7%**	**6%**	**7%**

Sample establishments have recorded increasing number of bookings and 7% turnover increase compared to 2011 (on-line bookings only). Yet, we have noticed conflicting figures within the sample figures:

- 33% of establishments have recorded 20% decrease, sometimes more
- 24% of establishments have recorded stable figures between 20% loss and 20% increase
- 43 % of establishments have recorded over 20% increase

The average result shows a 7% increase but hides extremely different situations. This is new; general trends recorded over the past seasons were much more similar.

The following charts show detailed evolutions for different segmentations. We hope these will give you more information to analyze your own situation.

Division per month of stay
General trends: balancing between July and August, increase of low season stays.

	Evolution 2011-2012		
	Bookings	Stay	Turnover
April	+21%	+19%	+17%
May	+117%	+80%	+117%
June	+23%	+31%	+35%
July	-6%	-5%	-5%
August	+10%	+11%	+19%
September	+91%	+104%	+117%
General Total	**+7%**	**+5%**	**+7%**

July and August bookings account for 74% of bookings and 85% of the turnover and both months are stable (-1% bookings and +2% turnover)
Bookings increase on low season, especially on stays in May. Are low season requests a consequence of the economic crisis? It is too soon to tell.
Moreover, low figures for July probably result from sluggish Dutch market (see next chart). When Dutch will start booking, figures should increase for July thanks to the South Netherlands starting Summer holidays on July 1st.

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Division per customer countries

	Evolution 2011-2012		
Customer countries	Bookings	Stay	Turnover
Nederland	+1%	+0%	-1%
France	+16%	+10%	+12%
United Kingdom	-2%	+3%	+7%
Germany	+15%	+16%	+24%
Belgie (NL)	+8%	+6%	+11%
Belgium (FR)	+11%	+9%	+12%
Switzerland	+12%	+16%	+22%
Denmark	-9%	-13%	+2%
Spain	+52%	+16%	-1%
Italy	+33%	+54%	+40%
Ireland	+45%	+30%	+23%
General Total	**+7%**	**+6%**	**+7%**

These figures must be read carefully.
The part of the Dutch market is a major issue here. Sluggish trend of the Dutch market weighs over general figures.
On the contrary, figures for France do increase significantly.
Other major markets are increasing too, especially Dutch and French speaking Belgium markets.
The German market shows a good economic situation added to increasing use of Credit Card payment.

Yet, the British market has recorded low figures compared to last year's.
The Danish market is decreasing too, when TO were announcing good revival! Here's contrary information with complicated explanation. The only explanation we can give for the moment is that Scandinavian market is experiencing a major economic crisis and customer consider TO booking more secure.

Division per accommodation types

	Evolution 2011-2012		
	Bookings	Stay	Turnover
Camping pitches	+3%	+4%	+5%
Hard rentals	+11%	+7%	+8%
General Total	**+7%**	**+5%**	**+7%**

Hard rentals have recorded increasing figures both in quantity (+11%) and turnover (+8%) while camping pitches have recorded lower increase (consequence of low Dutch figures).

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Division per destination

	Evolution 2011-2012		
	Bookings	Stay	Turnover
Spain	-5%	-6%	-9%
Italy	27%	35%	36%
France	7%	5%	8%
Others	-14%	-11%	-13%
Total	7%	5%	7%

First trends: Spain is decreasing while France is increasing a little and Italy a lot.

Regional division in France

	Evolution 2011-2012		
	Bookings	Stay	Turnover
Languedoc Roussillon	5%	7%	10%
PACA	23%	22%	18%
Rhône-Alpes	6%	4%	7%
Midi-Pyrénées	14%	3%	7%
Aquitaine	0%	-3%	1%
Poitou-Charentes	6%	7%	8%
Pays-de-la-Loire	-10%	-16%	-9%
Bretagne / Brittany	12%	2%	1%
Normandy	15%	6%	5%
Est	0%	-11%	-15%
Nord	11%	4%	12%
Centre Auv Limousin	-5%	-18%	-17%
Total	7%	5%	8%

Thanks to good increase, PACA is 2nd instead Rhône Alpes.
Languedoc Roussillon is still leading.
Aquitaine has recorded stable figures contrary to Pays-de-la-Loire recording decreasing figures.
Minor regions (East France and Centre-Auvergne-Limousin) have recorded decreasing figures on the turnover.

Conclusion

It appears very clearly that it is too soon to draw conclusions for the season. To be continued…
Check our Facebook page for further information and discussion!

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