



Snapshot on international bookings after Haiyan Typhoon

Valencia – 20th November 2013

“Use the power of global air reservation data to monitor and benchmark your destination’s performance”



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Traveller data intelligence

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Methodology

- ▶ This analysis is based on Air Reservation Data propriety of ForwardKeys® as of **16th November 2013**. Database contains reservations handled via the main GDS worldwide
- ▶ **Destination:** Philippines (PH)
- ▶ **Perimeter:** Includes air reservations made by passengers staying between 1 and 21 nights in destination
- ▶ **Source Markets** considered:
 - ▶ All international
 - ▶ 11 selected markets according to 2011 ranking at tourism.gov.ph¹: South Korea (KR), USA (US), Hong Kong (HK), Japan (JP), Singapore (SG), Australia (AU), Canada (CA), United Kingdom (GB), Taiwan (TW), Germany (DE), Malaysia (MY)

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Main Findings

- ▶ International bookings to Philippines have grown by 8,8% in the week following Haiyan Typhoon (10-16 Nov)
 - ▶ General growth hides drop from certain countries and profiles. Booking trends from selected markets¹ show overall 0,3% drop with relevant decrease from South Korea, Japan, Australia, Canada or Germany
 - ▶ Positive booking trends seen over the last week have been driven by arrivals taking place in the next 29 days. Longer lead times (typically linked to leisure profile) have dropped by 16,8% vs 2012 levels
- ▶ Issued bookings arriving in the next months show global good performance vs previous year
 - ▶ There has been an erosion of the booking situation after Haiyan specially in long lead times
 - ▶ Bookings issued for Christmas period should be monitored in order to secure performance of 2013 Christmas season

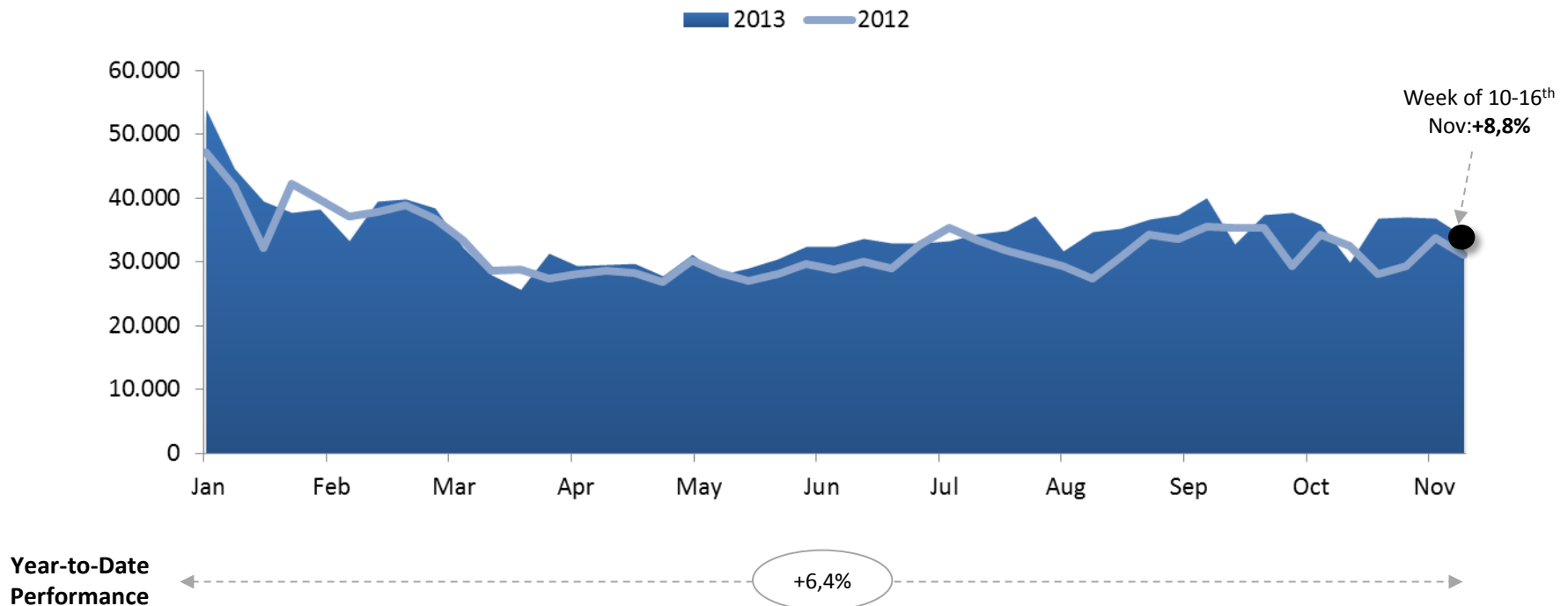
Year-to-Date international booking trends

Bookings in the last week above 2012 levels



- ▶ In the first week after the typhoon, international bookings to Philippines have kept positive trend seen over the last months

Weekly booking trends
(Pax; January-16th November)



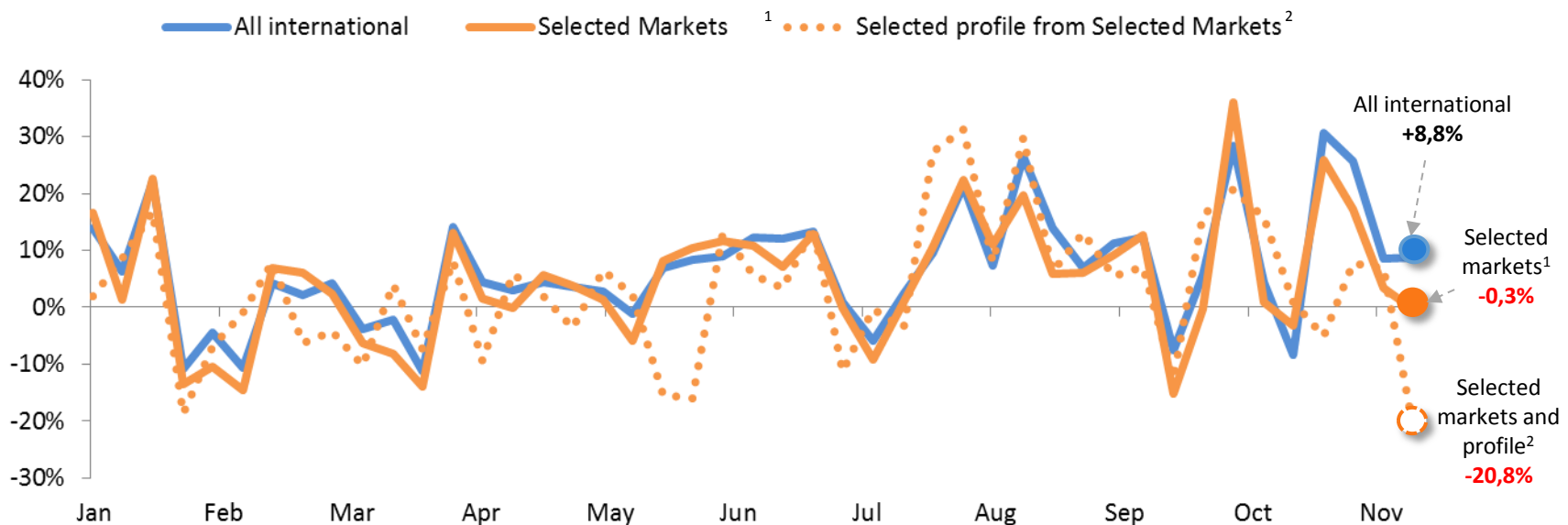
Year-to-Date international booking trends

Growth hides drop from selected markets and profiles



- ▶ Global booking situation seems not to have been damaged by Haiyan, but bookings from selected markets¹ have seen 0,3% drop vs previous year
- ▶ When specific leisure profile² is chosen, bookings have dropped by 20,8% vs 2012

Weekly booking trends by source market and profile
(Pax; January-16th November)



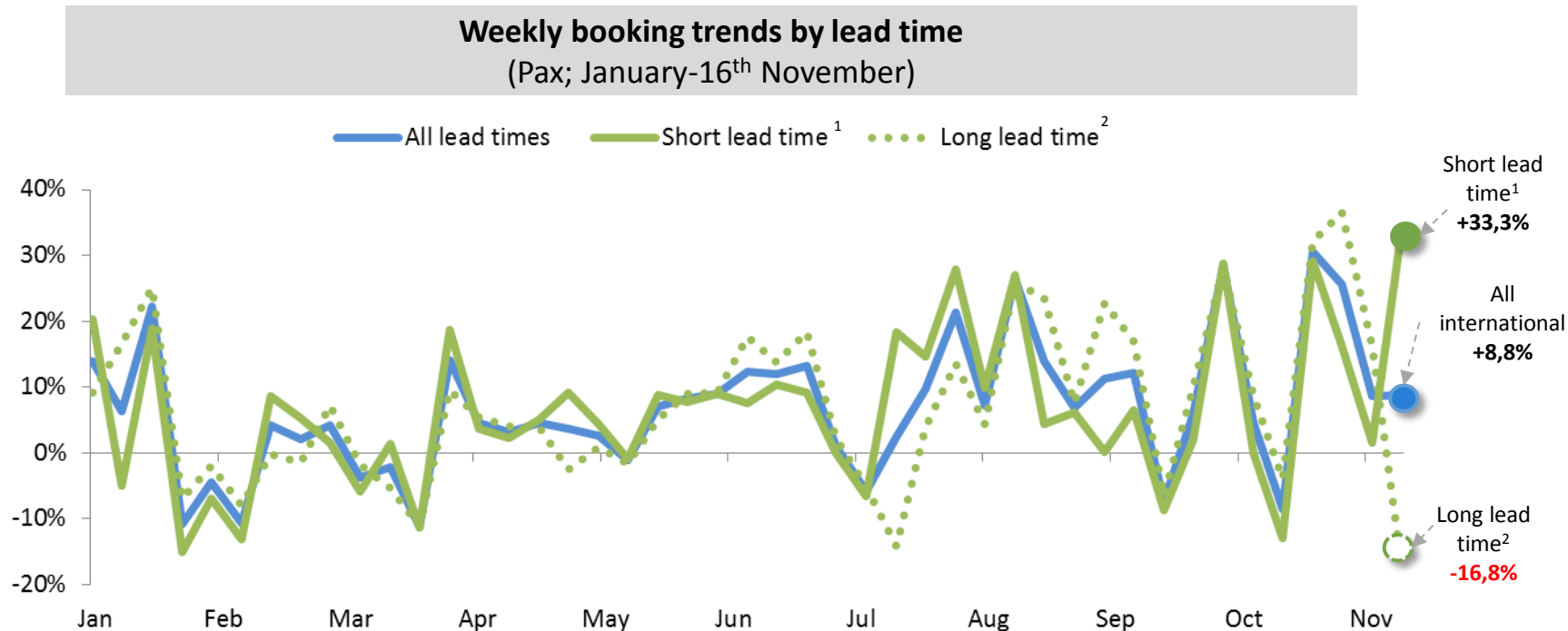
⁵ **Notes:** (1) Selected Markets : KR,JP,US,TW,AU,SG,CA,HK,GB,MY,DE (2) Selected profile includes couples staying between 6 and 21 nights in destination having booked their trip with more than 30 days of anticipation

Year-to-Date international booking trends

Last minute bookings as only growing category



- ▶ Bookings over the last week have increased for immediate¹ arrivals by 33,3%
- ▶ In the same period, long lead² time bookings have dropped 16,8% vs previous year



⁶ **Notes:** (1) Bookings issued with less than 30 days anticipation (2) Bookings issued with 30 or more days anticipation

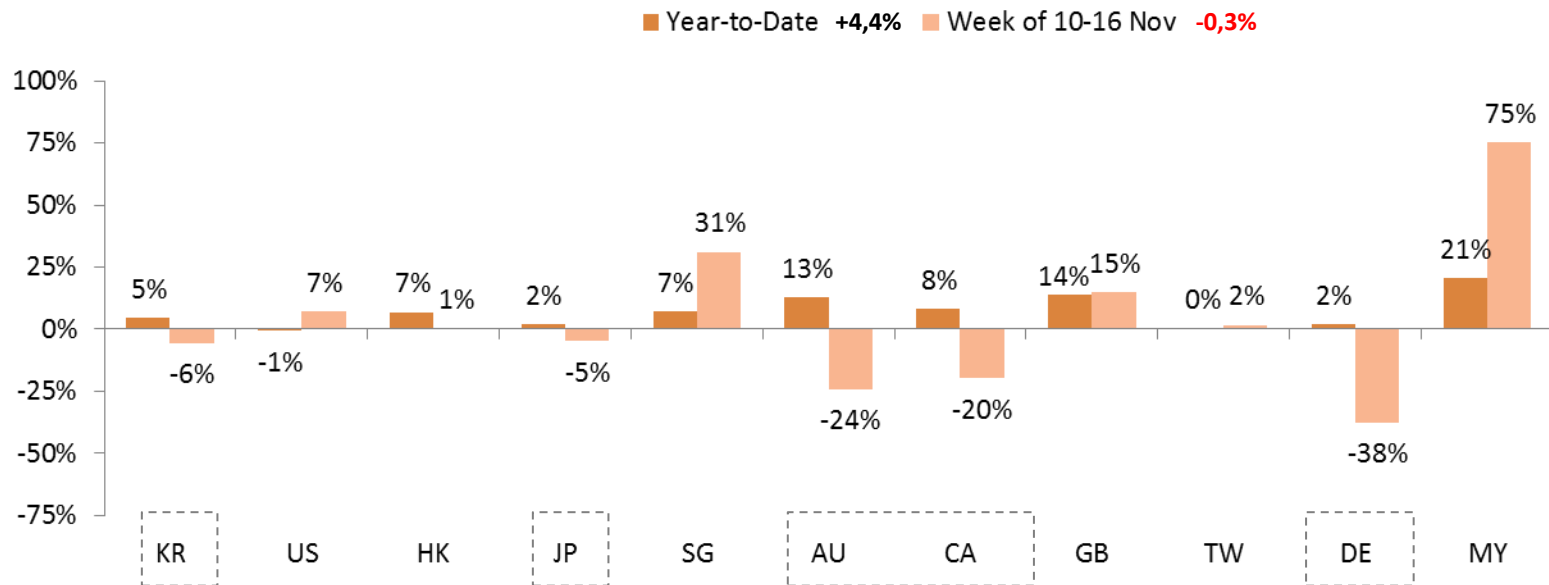
International booking trends after Haiyan

Among selected markets some show relevant erosion



- ▶ Bookings from some selected source markets have dropped in the last week below 2012 levels, contrasting with the general growth seen in Year-to-Date 2013

Selected market booking trends by source market
(Variation vs previous year; January-16th November)



KR JP AU CA DE Countries where performance over the last week (10-16 Nov) has been below 2012 levels

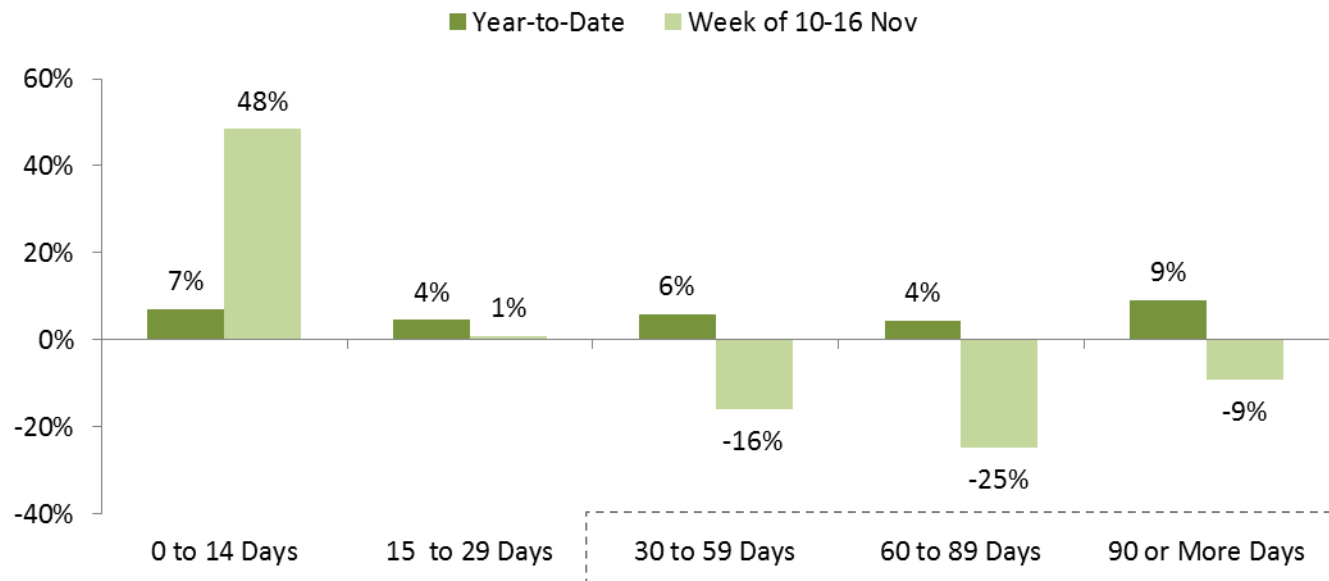
International booking trends after Haiyan


Last week bookings show drop for medium-long term



- ▶ After Haiyan, bookings have increased for arrivals taking place in the next 29 days
- ▶ In contrast, bookings with more than 30 days anticipation (typically related to leisure profiles) have dropped vs previous year

International booking trends by lead time
(Variation vs previous year; January-16th November)



 Categories where performance over the last week (10-16 Nov) has been below 2012 levels

International bookings for next arrival months



Booking situation is still positive until April 2014

- ▶ Booking perspective for next months is still above previous year situation
- ▶ Impact of Haiyan is clearer for long lead times, eroding expected performance specially from January onwards

International booking trends by arrival date
(Issued bookings; January-16th November)

