



Snapshot on leisure booking trends after Haiyan Typhoon

Valencia – 09th December 2013

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



ForwardKeys
Traveller data intelligence

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Methodology

- ▶ This analysis is based on Air Reservation Data propriety of ForwardKeys® as of **07th December 2013**. Database contains reservations handled via the main GDS worldwide
- ▶ **Destination:** Philippines (PH)
- ▶ **Source Markets** considered:
 - ▶ All international with detail of Asian markets¹ vs Long Haul markets²
- ▶ **Perimeter:** Includes air reservations made by passengers with “leisure profile”, identified as:
 - ▶ Passengers from Asian markets staying between 4-13 nights in Philippines, travelling in couples or groups up to 5 pax. and booking issued with more than 30 days of anticipation
 - ▶ Passengers from Long Haul markets staying between 6-21 nights in Philippines, travelling in couples or groups up to 5 pax. and booking issued with more than 45 days of anticipation

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Main Findings

- ▶ Seasonality of leisure bookings suggests Nov-Dec is not a crucial booking period
 - ▶ Haiyan Typhoon can be expected to impact booking trends specially in November and December
 - ▶ 2012 bookings show November and December are more relevant months for Asian countries than for Long Haul source markets
- ▶ 2013 Leisure booking trends indicates an erosion after Haiyan Typhoon
 - ▶ Year-Over-Year variation suggests impact has been stronger for Asian markets than for Long Haul countries
 - ▶ Bookings from top 10 feeders have dropped after the Typhoon
- ▶ Issued leisure bookings arriving in next months are still above previous year's level
 - ▶ Christmas campaign¹ seems not to have been impacted as bookings are still 13% above 2012 levels
 - ▶ Bookings arriving in the mid and long term are also above 2012 levels despite expected drop from Asian markets

2012 Leisure booking seasonality

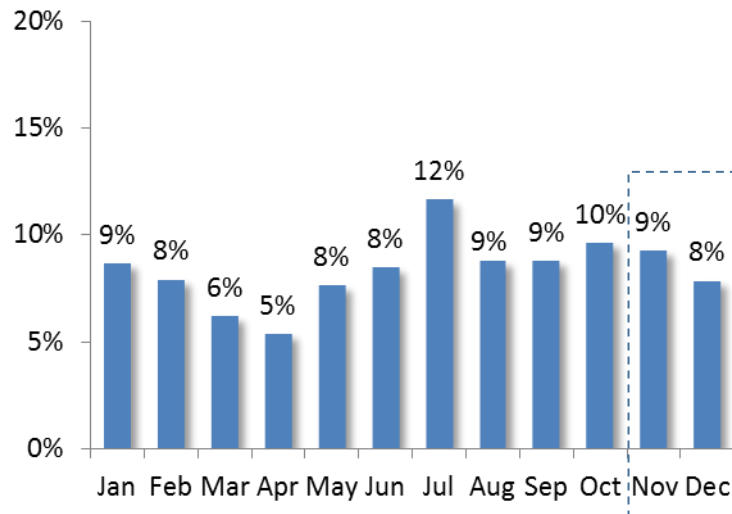
Relevance of Nov-Dec as months for booking issuance



- ▶ Leisure bookings from Asian markets show Nov-Dec as relatively relevant period
- ▶ In contrast, bookings from Long Haul markets are mostly issued in the first months of the year; November and December represent low share of total bookings

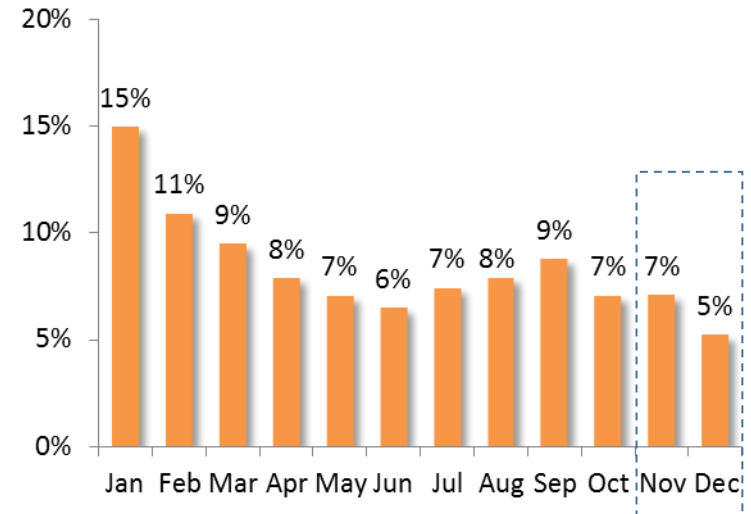
Leisure bookings from Asian markets

(% of total bookings; January- December 2012)



Leisure bookings from Long Haul markets

(% of total bookings; January- December 2012)

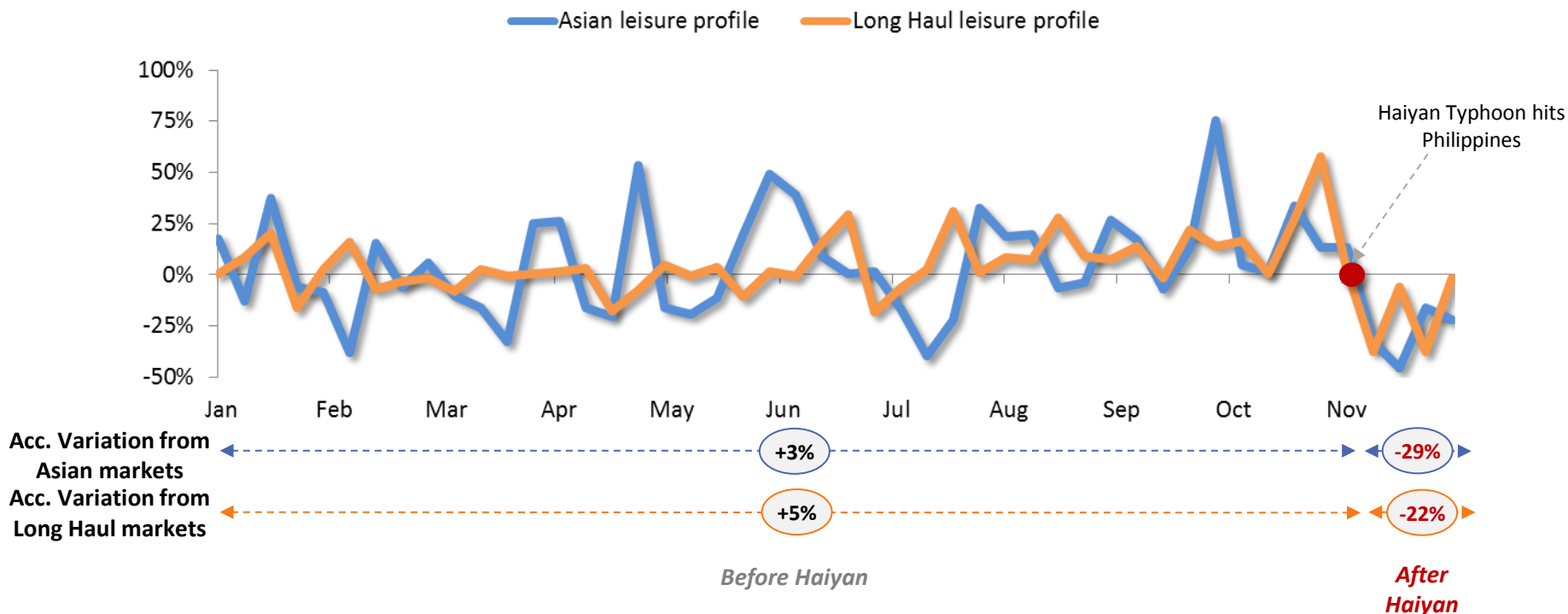


2013 Leisure booking trends

Drop of leisure bookings after Haiyan

- ▶ Leisure bookings to Philippines from Asian and Long Haul markets have shown constant negative trends since Haiyan
- ▶ Decrease has been more relevant from Asian markets than from Long Haul countries

Weekly leisure booking trends to Philippines by source markets
(% Var vs 2012; January-07th December 2013)



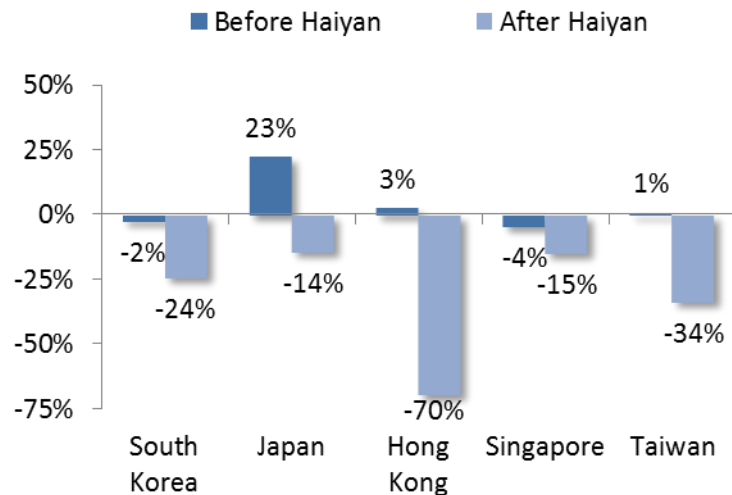
2013 Leisure booking trends



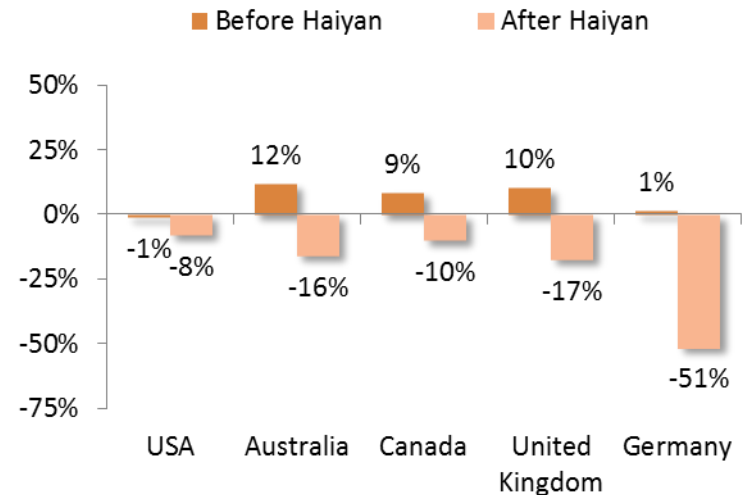
Top source markets show relevant erosion after Haiyan

- ▶ Bookings from top feeders have registered strong drop after Haiyan
- ▶ Hong Kong outlines as most impacted among Asian top source countries while Germany is the most affected Long Haul key market

Leisure bookings from top Asian markets
(% Var vs 2012; January-07th December 2013)



Leisure bookings from top Long Haul markets
(% Var vs 2012; January-07th December 2013)



Issued leisure bookings for next months

Booking situation for next months still positive



- ▶ Despite drop in bookings seen over last weeks, booking situation for arrivals in the next months (and specially in Christmas) is still above previous year levels
- ▶ However, drop from Asian markets could be expected in the medium-long term

Issued leisure booking arriving in Philippines in the next months by arrival date
(Issued bookings; 19th December 2013-30th April 2014)

