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## **Germany Outbound 2014 & 2015 On the Book**

*Valencia – February 2015*

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



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# Methodology



- ▶ This analysis is based on Air Reservation Data propriety of ForwardKeys® as of 17<sup>th</sup> Feb 2015. Database contains reservations handled via the main GDS worldwide. Database updated as of **14<sup>th</sup> Feb 2015**.
  
- ▶ **Perimeter:**
  - ▶ Market: Germany
  - ▶ Destination: Long haul destinations (non-EU destinations)
  - ▶ Period:
    - ▶ Arrival history: 1<sup>st</sup> January to 31<sup>st</sup> December 2014.
    - ▶ Arrivals on the book cover 1<sup>st</sup> Feb to 30<sup>th</sup> April 2015, based on issued bookings between 1<sup>st</sup> Feb 2014 and 31<sup>st</sup> Jan 2015.
  - ▶ Lengths of Stay: Current analysis includes only those reservations that stayed at least one night in destination, therefore excluding transits, day trips or one way trips.

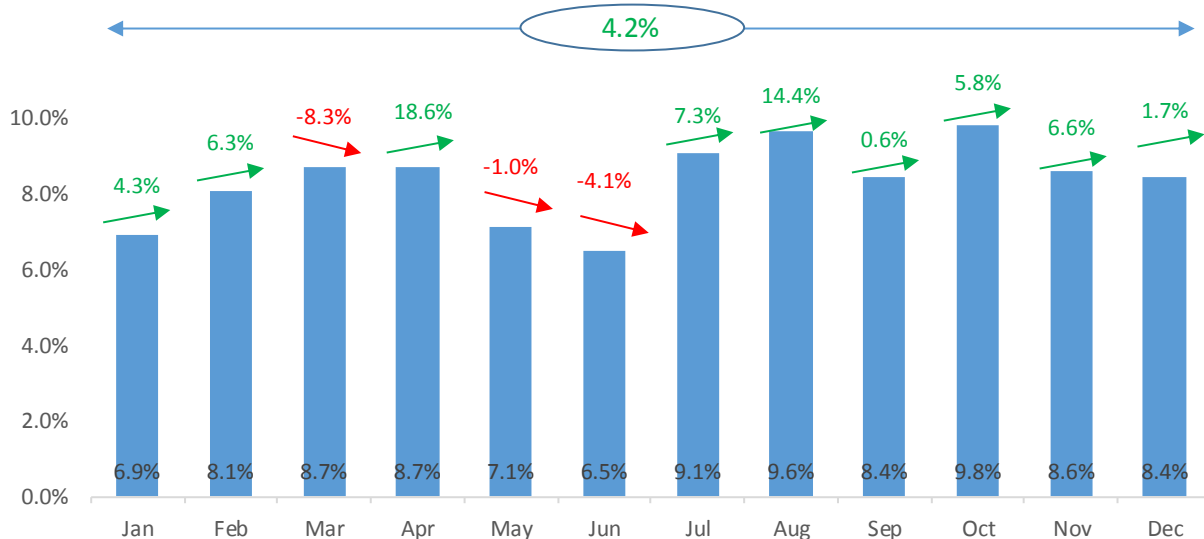
# Germany Outbound Trends 2014

## Back to robust growth



- Germany outbound to long haul destinations showed a stable growth in 2014 (+4.2%) while holiday shifts did impact early Spring into Summer trend\*. June has been seeing drops during last years, shifting preferences to later travel dates.
- 2013 experiencing slow growth along with the global economic crisis, 2014 performance gets closer to 2012 performance levels.

**Monthly Departures from Germany to Long Haul destinations**  
(Monthly % of Total German arrivals to long haul destinations; Var. of monthly German arrivals vs. Prev. Year. Jan-Dec 2014)



**% Var from Germany to Long Haul destinations**  
(Var. of Yearly German arrivals to long haul destinations vs. Prev. Year. 2012 - 2014)

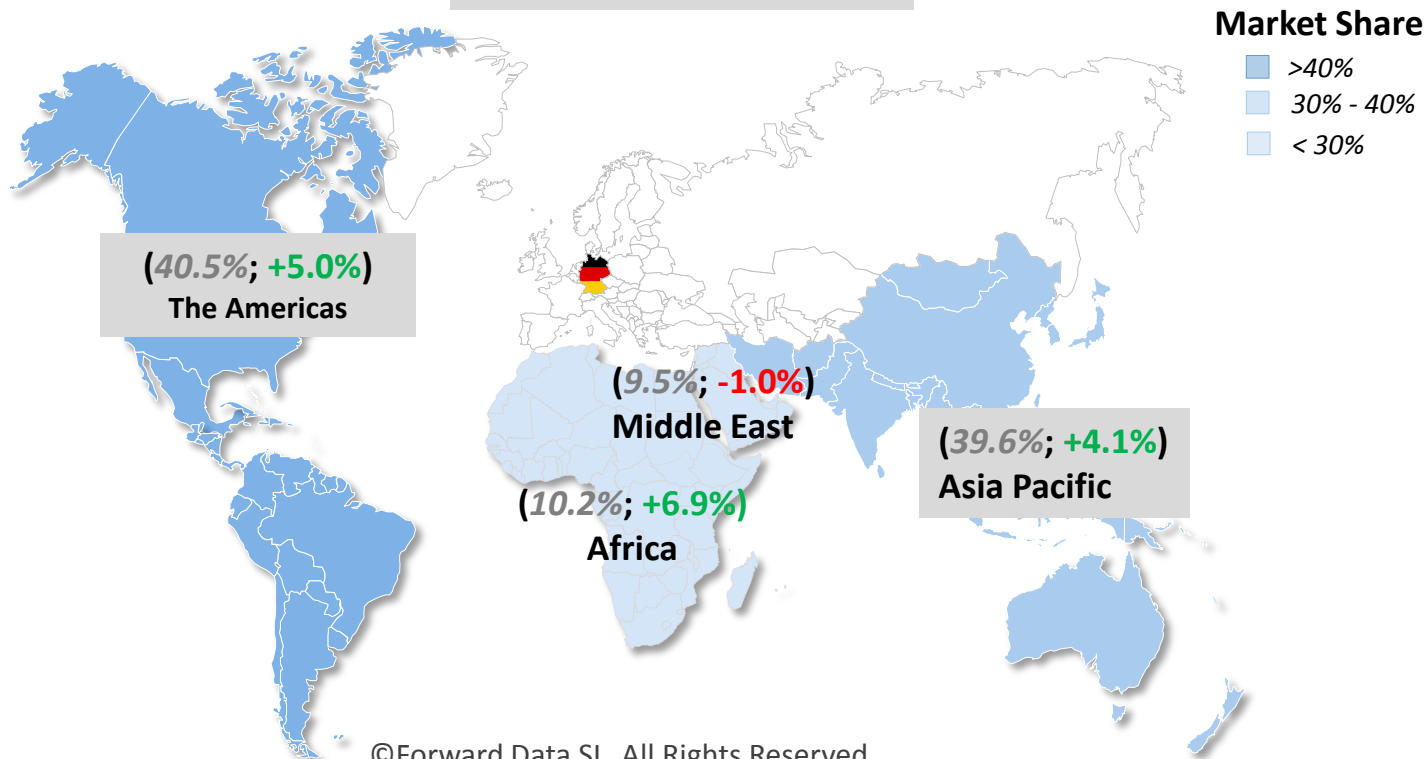


## Americas and APAC lead the way

- Only Middle East suffered decrease in German arrivals during 2014, while The Americas share and performance are very close to those of Asia Pacific.
- Africa strong performance is mainly due to double digit growths to South Africa and Morocco – compensating an otherwise poor performance related to the Ebola outbreak.

**Germany Outbound to Long Haul Destinations by Region**  
(% of Total arrivals; Var. vs. Prev. Year. Jan-Dec 2014)

(Market Share; Var. vs. Prev. Year)

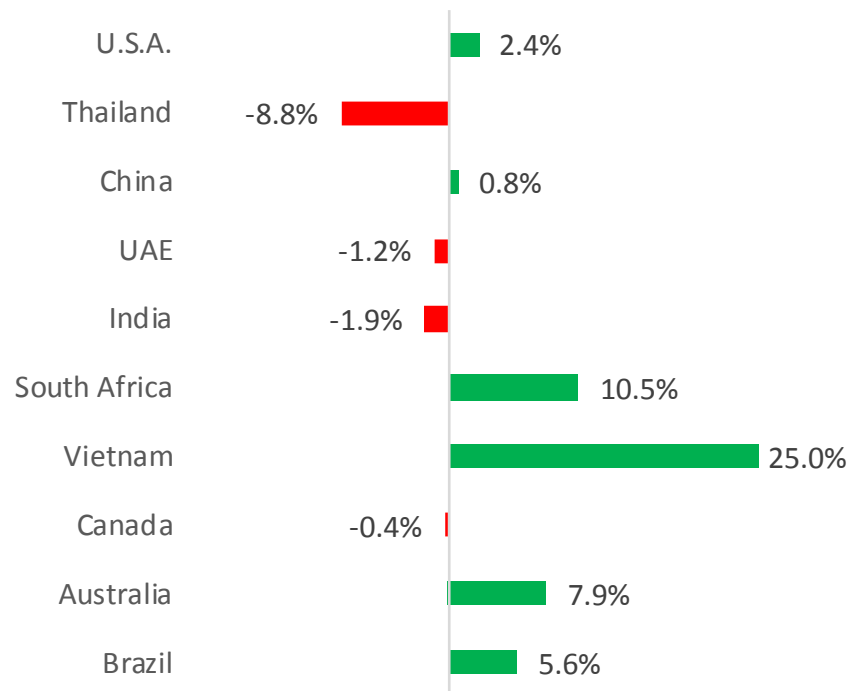


## Performance by destination country



- Thailand suffered from its political unrest (Coup d'Etat on May 22<sup>nd</sup>) while its competitor Vietnam enjoyed positive monthly growth all year around except June and December.

**Top long haul destinations for German Outbound**  
(Rank according to market share; Var. of total arrivals from Germany vs. Prev. Year. Jan-Dec 2014)



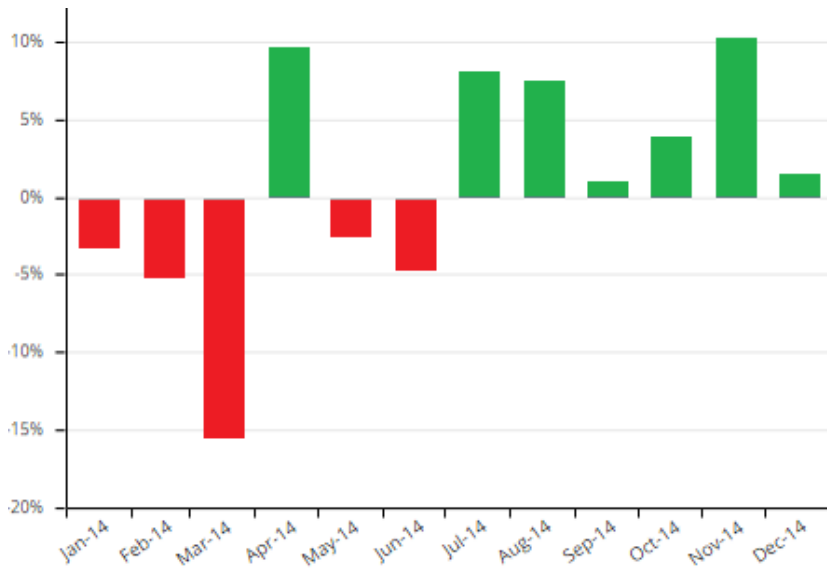
# Germany Outbound Trends 2014

## Top 2 long haul destinations uneven performance

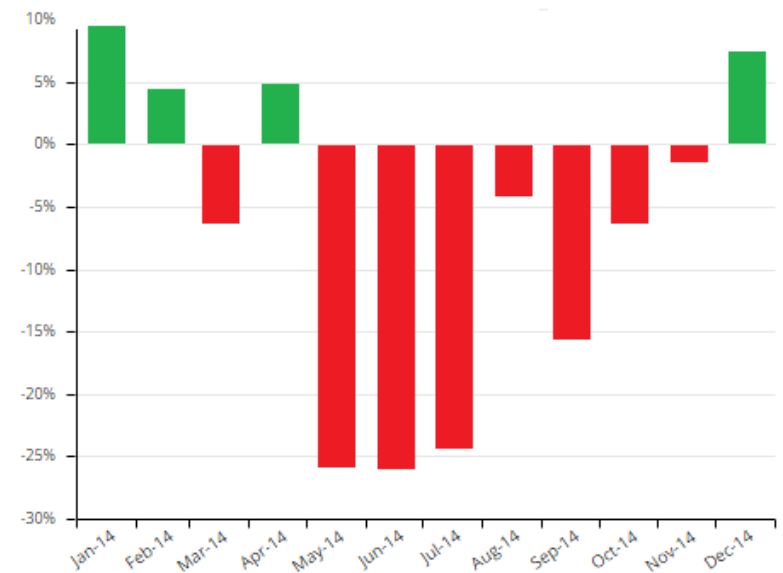


- German arrivals to U.S.A., top long haul destination, grew in the holiday months (April, June, July, November), suggesting leisure/expat-oriented traveler profile.
- Shifting to negative variations after May's Coup d'Etat, Thailand's monthly performance lined with the political situation evolution during 2014, with improved variations by year's end.

**Monthly Var. vs. Prev. Year. Germans to U.S.A. 2014**  
(Var. of monthly German arrivals to U.S.A., Jan-Dec 2014)



**Monthly Var. vs. Prev. Year. Germans to Thailand 2014**  
(Var. of monthly German arrivals to Thailand, Jan-Dec 2014)

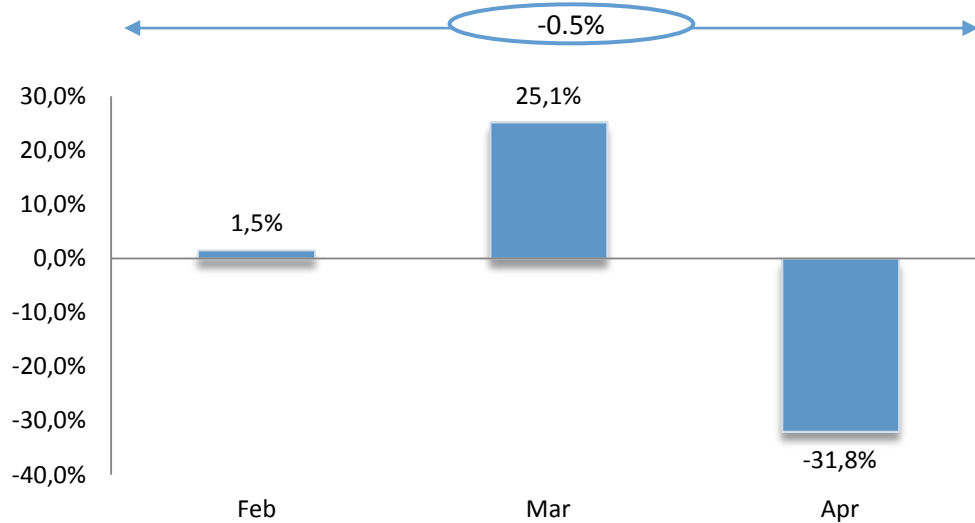


## Germany Outbound Trends 2014

# Easter shift visible in next months bookings

- Overall Germany outbound bookings to long haul destinations is underperformed due to the lack of booking for April travel.
- Asian destinations show robust growths in advanced bookings from Germany: Thailand is recovering from last year's drop (-8.1%) while Vietnam, Sri Lanka and Maldives enjoys about 10% increases.

**Germany arrivals on the Book to Long Haul Destinations  
Feb-Apr 2015**  
(Var. of issued bookings vs. Prev Year)



**Top Destinations on the Book. Feb-Apr 2015**  
(Var. of issued bookings vs. Prev Year)

