

***Ramadan Impact on Indonesia
Outbound:
2011-2014 & 2015 On the Book***
Valencia – April 2015



*“Applied traveler operational intelligence to support
tactical business decisions”*

www.ForwardKeys.com

Methodology and Glossary



- ▶ This analysis is based on Air Reservation Data propriety of ForwardKeys® as of 10th April 2015. Database contains reservations handled via the main GDS worldwide. Database updated as of **8th April 2015**.

- ▶ **Perimeter:**
 - ▶ Market: All International, Long Haul (non-Europe) markets
 - ▶ Period:
 - ▶ Arrival History: 1st June to 31st August, 2011 to 2014.
 - ▶ Ramadan Ending Week is defined as a whole seven-day week end with the last day of Ramadan, thus for 2014, it is Jul 22nd to 28th; for 2013, it is Aug 1st to 7th.
 - ▶ On the Book: 1st June to 31st August, 2015
 - ▶ Lengths of Stay: Current analysis includes only those reservations that stayed at least one night in the destination, therefore excluding transits, day trips or one way trips.

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- ▶ **Arrivals** refer to the number of airline passengers arriving at the destination within a specific time frame.
 - ▶ **Overnights** refer to the Quantity of travellers staying during a specific time period in a destination, regardless of their arrival dates.

Main Findings



- ▶ Taking Indonesia outbound as an example, ForwardKeys revealed that a traveling peak appeared a few days ahead of the Ramadan ending dates, during the already busy summer season.
- ▶ In Indonesia, bookings for Ramadan travel surged five to six months in advance from the period's ending dates. According to the issued bookings as of April 8th 2015, this year's Ramadan travel peak will fall on July 15th.
- ▶ Asian destinations are preferred by Indonesian travelers. Travelers during 2014 Ramadan showed a very leisure and VFR profile, with high shares for longer lengths of stay and group travels.

Daily Departure Trend Jun-Aug 2011-2014 - Indonesia

Busy Traveling around the Ramadan Ends

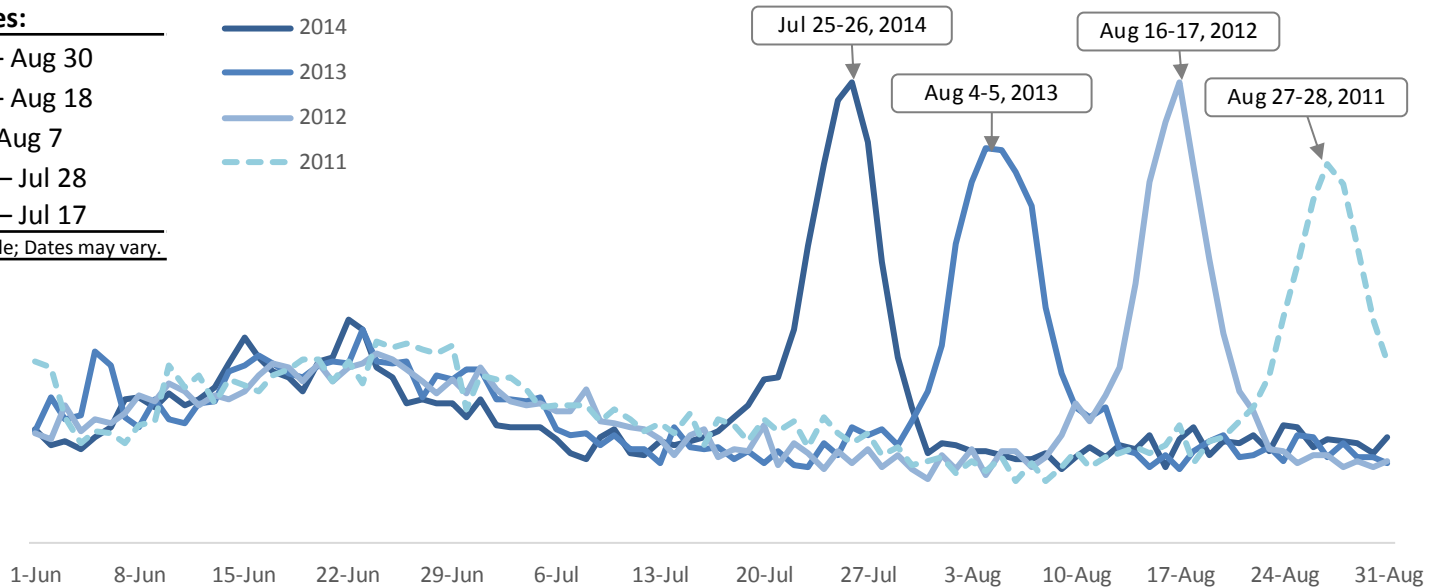
- ▶ In Indonesia, the short busy departure period always peaked three to four days before the Ramadan ending dates.

Outbound Trend from Indonesia.
(Jun 1st to Aug 31st. 2011-2014)
Based on Real Departure figures

Ramadan Dates:

2011	Jul 31 – Aug 30
2012	Jul 19 – Aug 18
2013	Jul 8 – Aug 7
2014	Jun 28 – Jul 28
2015	Jun 17 – Jul 17

*According to Google; Dates may vary.



Booking Pace for Trips during Ramadan Ending Week

Huge Bookings as Early as Five-Six Months Ahead

- ▶ For the past two years, large numbers of bookings for trips during the Ramadan Ending Week appeared as early as 21 to 23 weeks ahead.

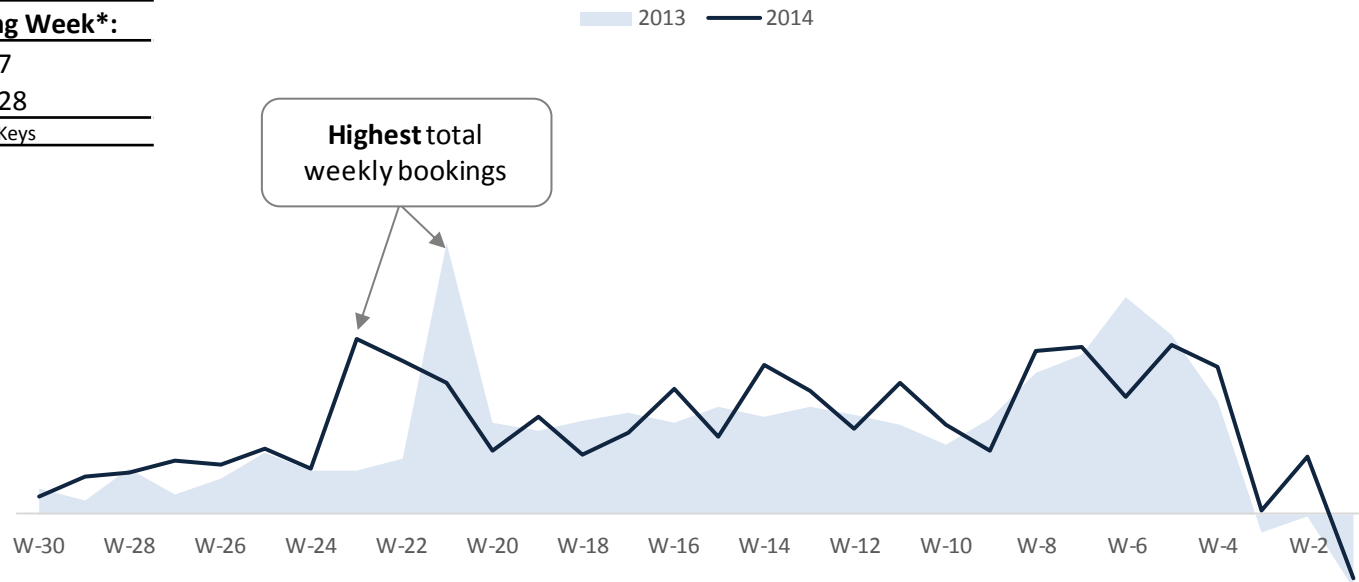
Booking Pace for Indonesia Outbound Trips during Ramadan Ending Week.
(Based on weekly booking figures. 2014 vs. 2013)

Ramadan Ending Week*:

2013 Aug 1 – 7

2014 Jul 22 – 28

*Defined by ForwardKeys



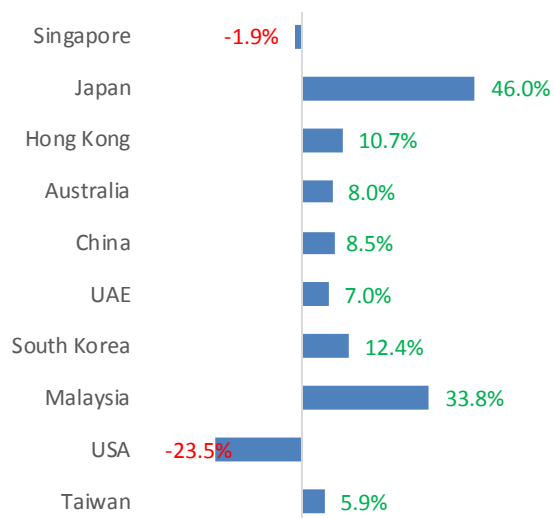
Traveler Profile for 2014 Ramadan Ending Week

Neighboring Destinations on the Rise, except Singapore

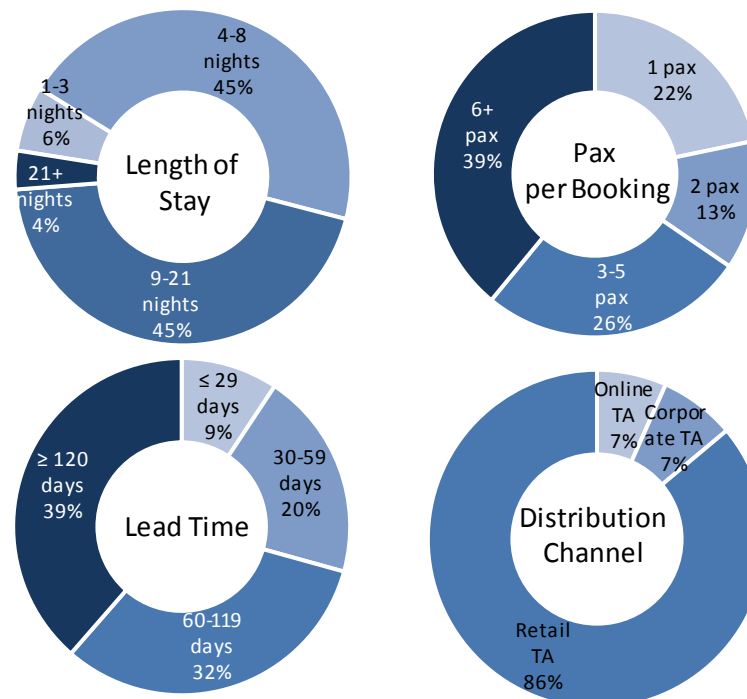
- ▶ Neighboring destinations, particularly Northeast Asian countries won huge popularity among Indonesian travelers.
- ▶ Ramadan Ending Week while the summer break season contributed to the high shares of group travels as well as longer length of stay.

*1-2 pax counted for 50% while stays of 9+ nights is about 30% in the 2014 yearly traveler profile.

Top 10 Destination Performance.
(Var. of Total arrivals from Indonesia)
Ramadan Ending Week 2014 vs. 2013



Indonesian Traveler Profile
during 2014 Ramadan Ending Week.
(% share of Total departures)



Departure On the Book Jun-Aug 2015 - Indonesia

Same peak day as 2014 – two days ahead

- ▶ OTB History for 2014 Ramadan highly matches the final arrivals.
- ▶ Advanced bookings for Indonesian outbound shows the peak traveling day will be still two days ahead of the Ramadan ending date.

Departures on the Book. Indonesia.
(Daily bookings for Jun-Aug 2015 vs. Jun-Aug 2014)

Ramadan Dates:

2014 Jun 28 – Jul 28

2015 Jun 17 – Jul 17

*According to Google; Dates may vary.

