

# ***Impact of January 2016 Istanbul Bombing Air Passenger Bookings***

***Valencia – January 2016***

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*(January 19<sup>th</sup> data update version)*

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



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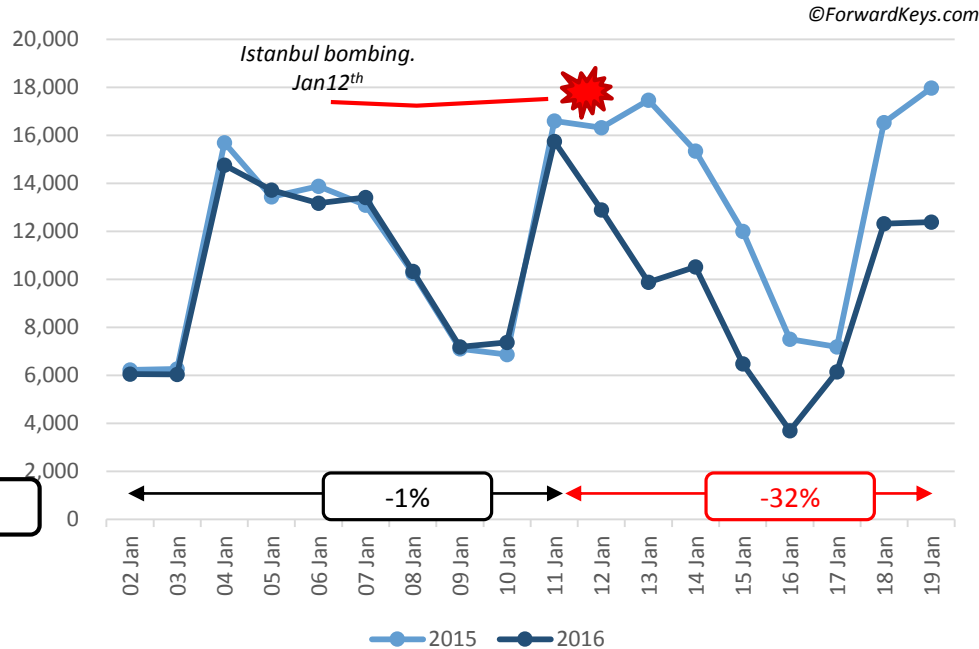
# Total Int'l Bookings to Istanbul

## Large Fall in Total Int'l Bookings After the Attack

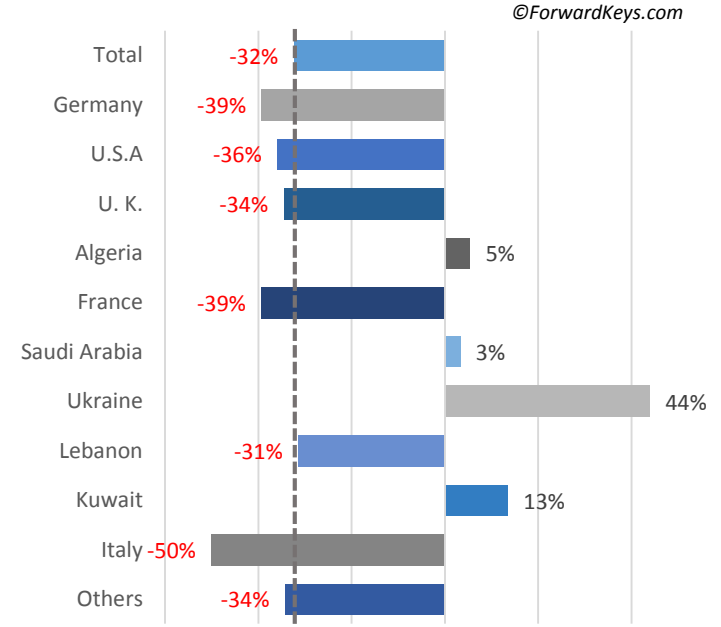


- Top source market, Germany, is seriously affected by the bombing, falling by -39% in net bookings during the aftermath.
- Only Middle East countries (Algeria, Saudi Arabia and Kuwait) and Ukraine showed better performance, the latest due to an even more negative situation during 2015.

Net Daily Total Int'l Bookings\*  
(Jan 2nd – 17th; 2016 vs 2015)



Net Daily Bookings\* . Top 10 Markets.  
(Jan 12th – 19th; 2016 vs 2015)



\*Net bookings are the result of new bookings minus (-) cancellations over the analyzed time period. Lower than -100% net bookings indicate an immediate surge in cancellations that lead to a drop bigger than last year's net bookings issued during the same time period.

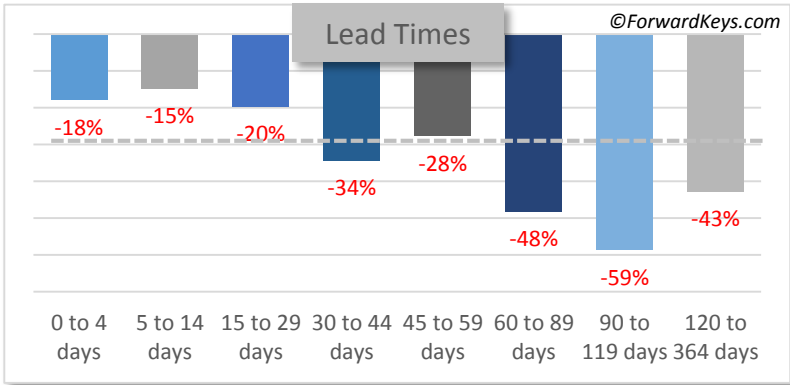
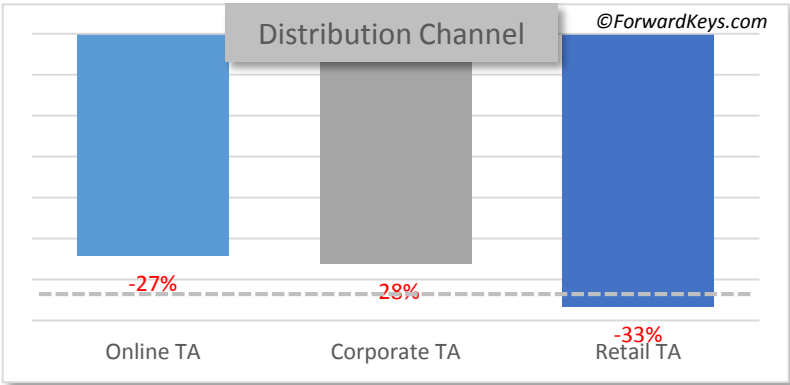
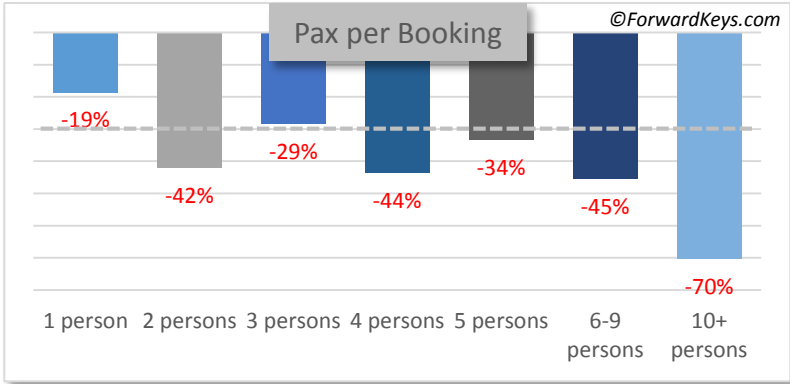
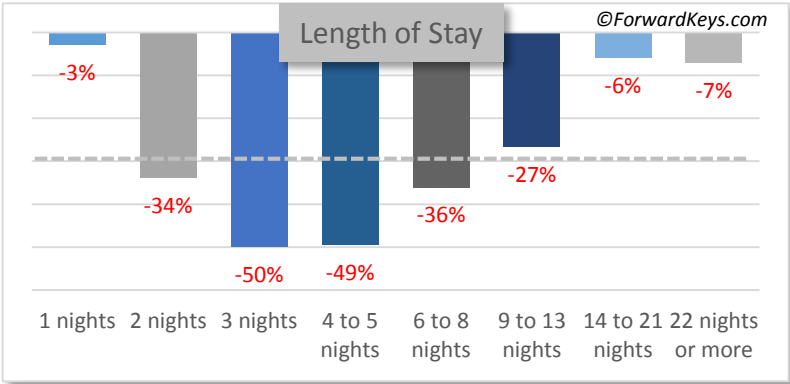
# Net Bookings Performance

## Leisure Travel Most Affected



- Segments related to leisure travel suffered a strong decline, with 3 to 5 nighters and groups heavily underperforming vs last year.

Total Int'l Net Bookings Performance by Length of Stay, Pax per Booking, Lead Time and Distribution Channel (Jan 12<sup>th</sup> – 19<sup>th</sup>; 2016 vs 2015)




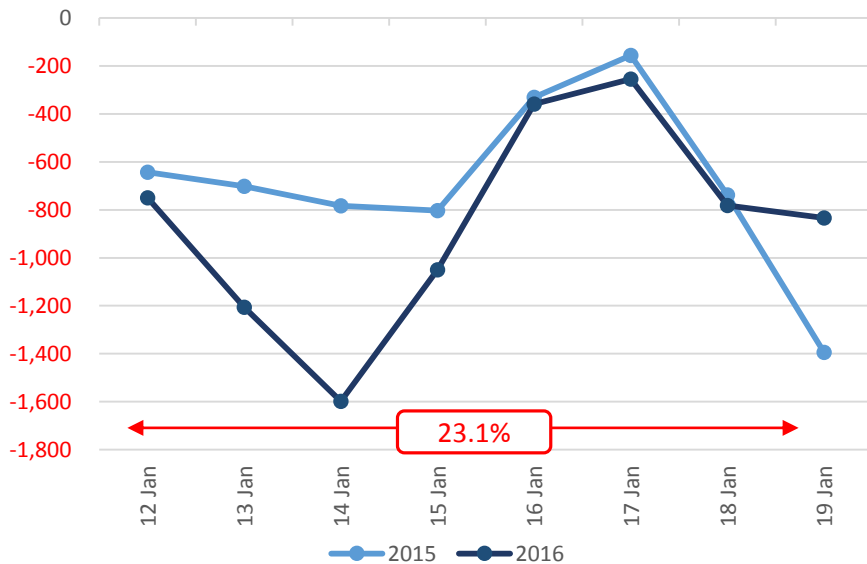
# German Cancellations and New Bookings

## German Victims Fuel Cancellations

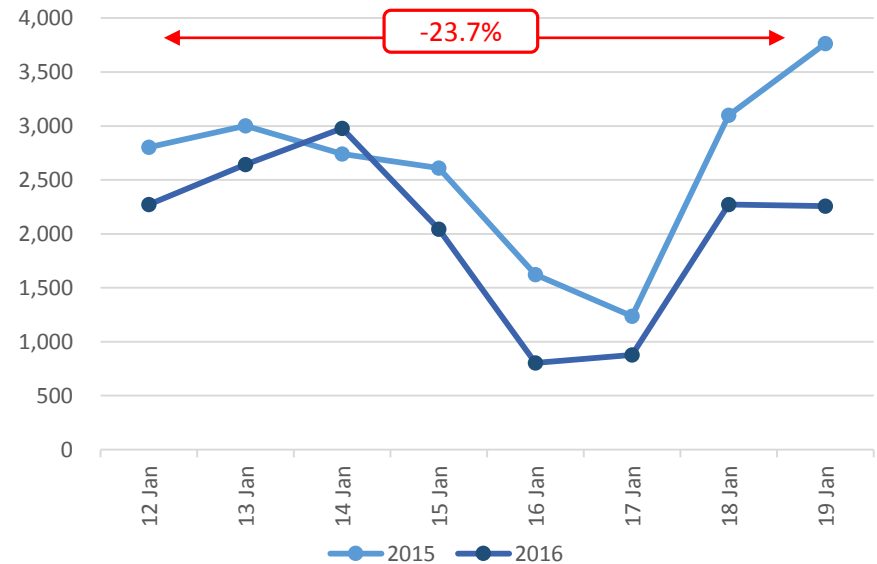


- The large number of cancellations, and the lack of new bookings from Germany is a reflection of the impact that the attack has had on Germany as a source market.

 German Daily Cancellations  
(Jan 12<sup>th</sup> – 19<sup>st</sup>; 2016 vs 2015)



 German Daily New Bookings  
(Jan 12<sup>th</sup> – 19<sup>st</sup>; 2016 vs 2015)




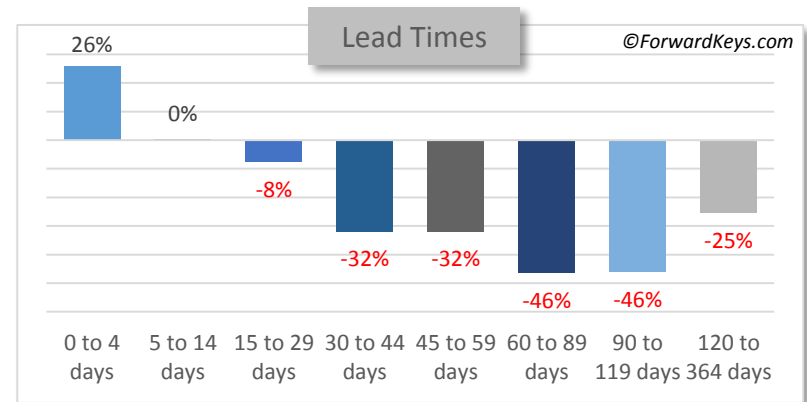
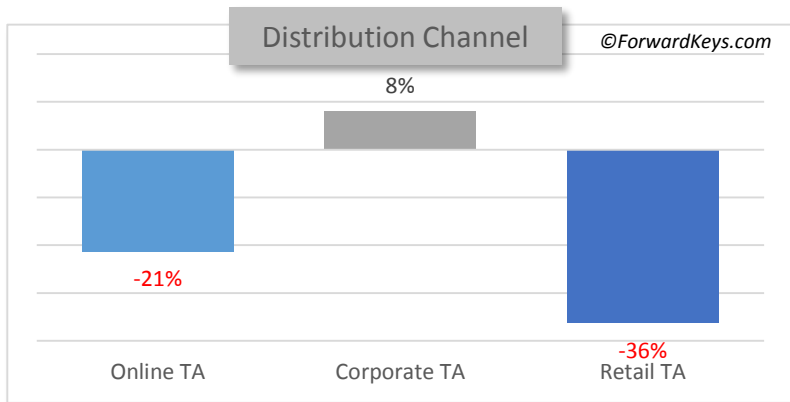
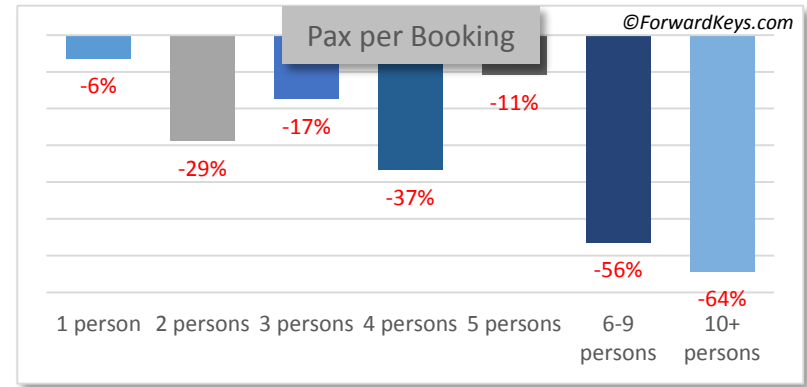
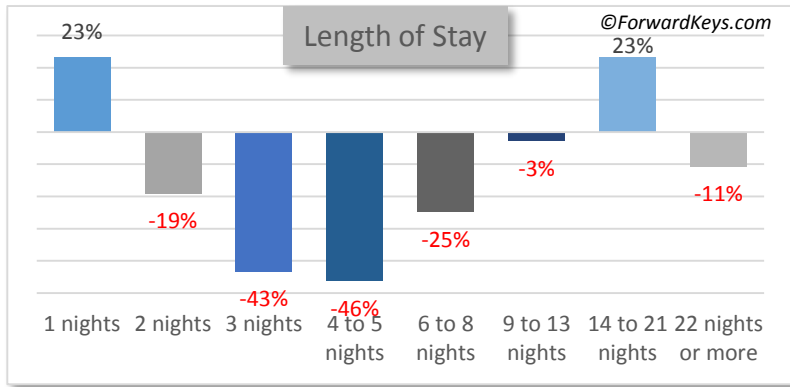
# New Bookings from Germany

## Impact on German Tourism



- A strong negative impact on leisure segment, while business-type trips and ethnic flows remain more resilient.

 German New Bookings Performance by Length of Stay, Pax per Booking, Lead Time and Distribution Channel (Jan 12<sup>th</sup> – 19<sup>th</sup>; 2016 vs 2015)

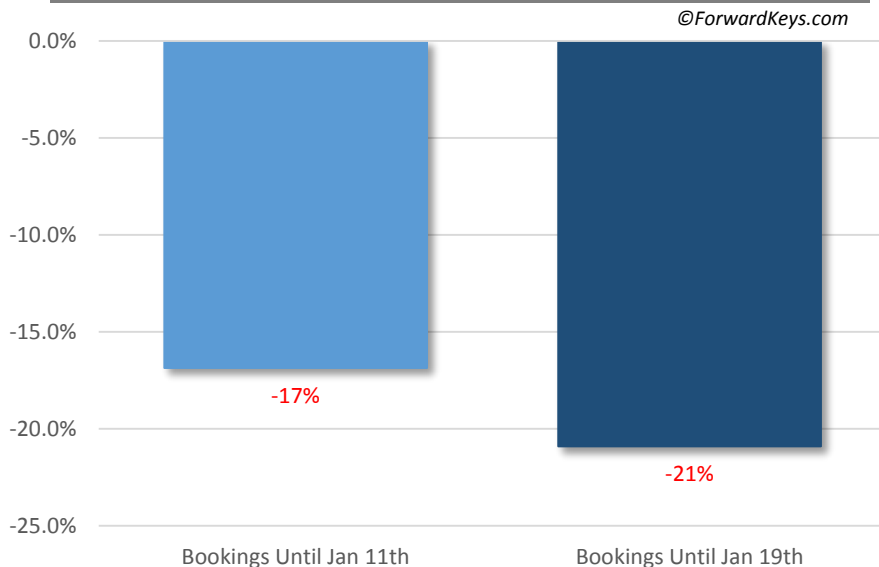


## Booking Situation Worsening After Attacks

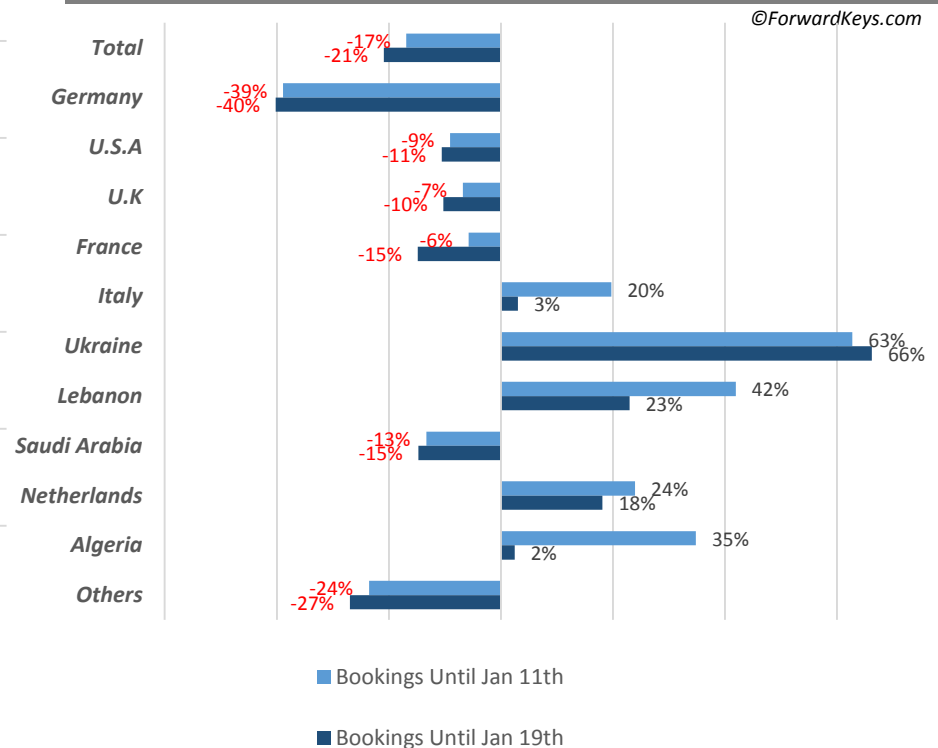


- Previously negative picture becomes more worrisome after Nov 12<sup>th</sup>.
- Improved performance from Ukraine is mostly a consequence of its previously negative situation.
- Albeit with positive variations, Italy, Lebanon, Netherlands and Algeria reduce their previous growth.

**%Var Arrivals On The Book**  
**(Feb 1st to Apr 30th 2016 vs Feb 1st to May 2nd 2015)**  
*Based on booking situation as of Jan 11th vs Jan 19<sup>th</sup>*



**%Var Arrivals On The Book By Top Source Markets**  
**(Feb 1st to Apr 30th 2016 vs Feb 2nd to May 2nd 2015)**  
*Based on booking situation as of Jan 11th vs Jan 19<sup>th</sup>*



# Methodology and Glossary



- ▶ This analysis is based on Air Reservation Data property of ForwardKeys® as of 21<sup>th</sup> January 2016. Database contains reservations handled by more than 200 000 online and offline travel agencies worldwide. Database updated as of **19<sup>th</sup> January 2016**.
- ▶ **Perimeter:**
  - ▶ Destination: Istanbul
  - ▶ Source Market: Total International bookings
  - ▶ Period:
    - ▶ **Booking history:** 2<sup>nd</sup> January to 19<sup>th</sup> January 2016 vs. 3<sup>rd</sup> January to 20<sup>th</sup> January 2015.
    - ▶ **Arrivals on the book:** Arrival dates from **1<sup>st</sup> February to 30<sup>th</sup> April 2016** based on issued bookings as of 11<sup>th</sup> and 19<sup>th</sup> January 2016. Variations are calculated comparing with booking situation for arrivals 2<sup>nd</sup> February to 2<sup>nd</sup> May 2015.
  - ▶ Lengths of Stay: Current analysis includes only those reservations staying at least 1 night at destination, therefore excluding transits, day trips or one way trips.
- ▶ **Arrivals** refer to the number of airline passengers arriving at the destination within a specific time frame.
- ▶ **Arrivals on the Book (OTB Arrivals)** refer to the number of airline passengers arriving at the destination within a specific future time frame according to the bookings that have been issued as noted.
- ▶ **Bookings** represent air reservations made for travel to the specific destination (i.e. Paris) for any date of travel.
- ▶ **Net Bookings** equal to reservations that have been made minus cancellations.
- ▶ **Cancellations** include modifications to any previously issued booking as well as final cancellation.
- ▶ **January Istanbul Bombing** information extracted from [https://en.wikipedia.org/wiki/2016\\_Istanbul\\_bombing](https://en.wikipedia.org/wiki/2016_Istanbul_bombing)

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