

German Outbound Market Air Passenger Trends

***2015-16 Moving Year &
Forward Looking March to August 2016***

March 2016

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



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German Outbound Market Overview

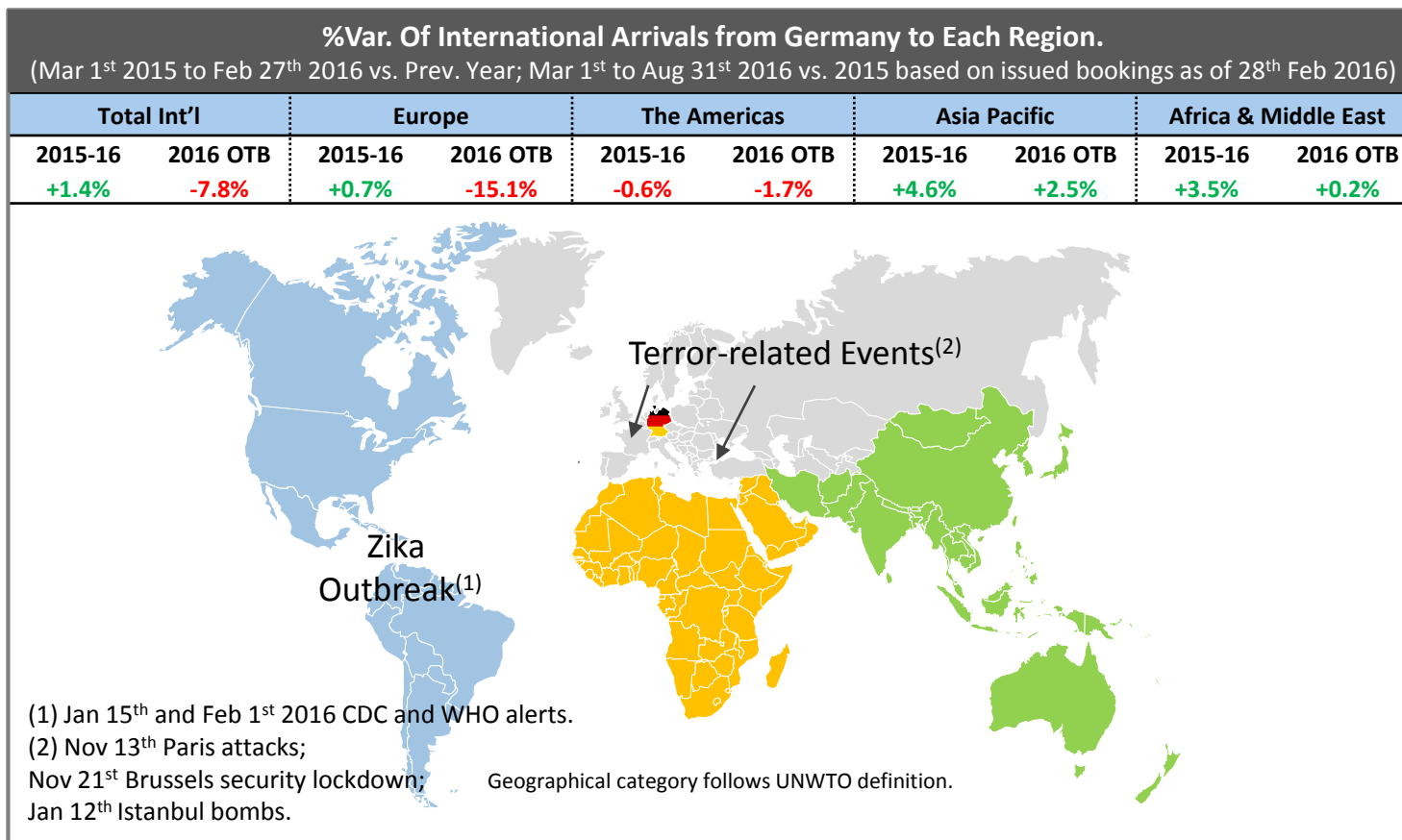
2015-16 Moving Year & Forward Looking March to August 2016



ForwardKeys
Traveller data intelligence

Terror-related Events and Health Emergency Worrying the Market

- German outbound market was up 1.4% during the moving Year 2015-16: Europe received 55% of the total German international arrivals, while the Americas and Asia Pacific welcomed 18% respectively.
- Forward looking March to August 2016 German market situation: Europe has been suffering from a lack of bookings, worsened by the attacks in Paris; the Americas has seen fewer bookings particularly for Easter and Spring holidays from the German market, partly due to the Zika outbreak in South America and a strong dollar.



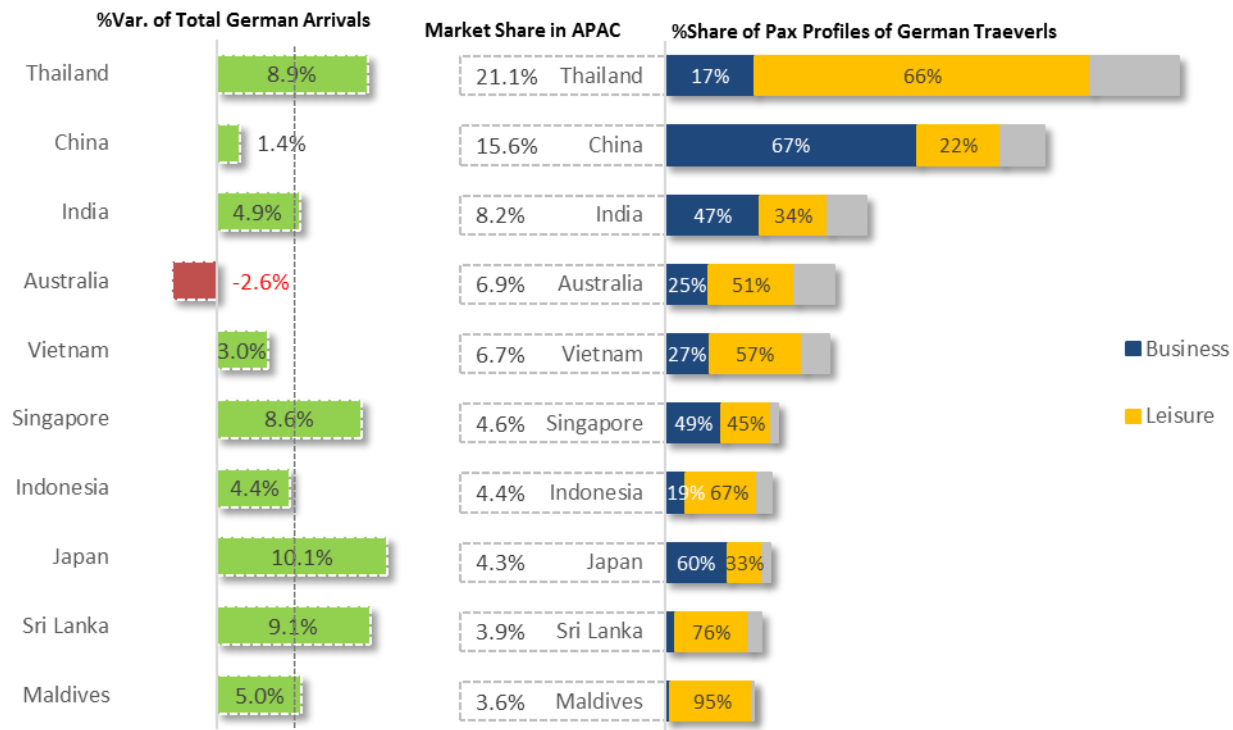
Top 10 Destinations in Asia Pacific for German Market Moving Year 2015-16

Growth in Leisure Market Supports APAC Destinations



- Among the leading destinations in Asia Pacific, leisure destinations Thailand and Sri Lanka welcomed a good increase of 9% of total German arrivals year on year; traditionally more-business-oriented destinations – Singapore and Japan – both enjoyed double-digit growth in their German leisure segment.

Top 10 Destinations in Asia Pacific for German Long-Haul Outbound. 2015-16 Moving Year
 (%Var. of Total German Arrivals; %Share of Total German Arrivals in Asia Pacific and %Share of Pax Profile in current moving year; current moving year 1st Mar 2015 to 27th Feb 2016 vs. Prev. Year)



German Arrivals in APAC: +4.6%

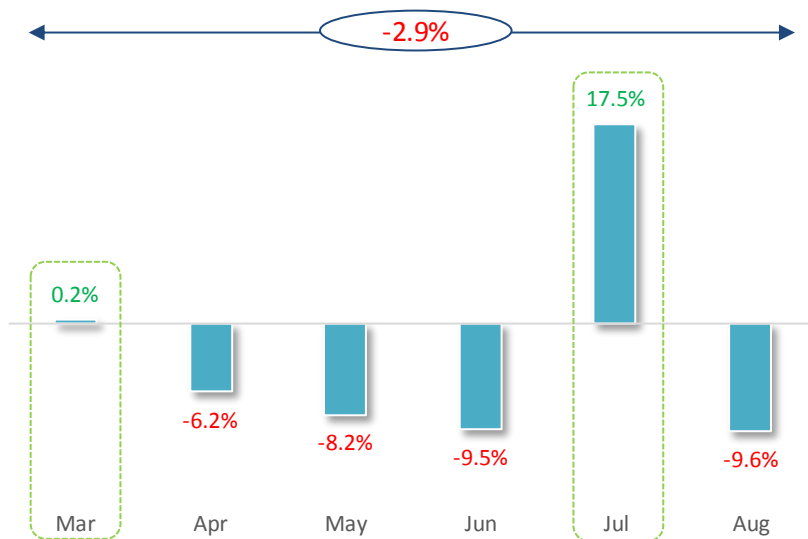
Forward Looking German Leisure Long-haul Outbound March to August 2016

Early Demand Strong for Summer Holiday & New Destinations

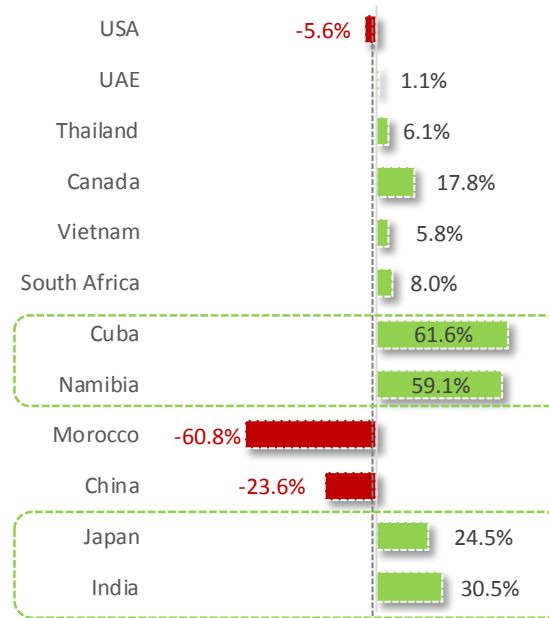


- Forward Bookings for long-haul leisure outbound from Germany are only strong for July, when the summer holiday begins. Among the top destinations, Cuba and Namibia rise over 50%; Cuba benefits from a more stable relationship with Western countries and Namibia gets bookings from those avoiding political unrest in South Africa.
- Morocco saw a drop of over 60% in forward bookings, due to the safety and security concerns within the region (Morocco, Algeria, and Tunisia – terrorist attacks and migrant issues). China sees weaker demand from Germany after the Easter peak.

%Var. of German Leisure Long-haul Outbound on the Book for 1st March to 31st August 2016
(Monthly %Var vs. Prev. Year; bookings as of 28th Feb 2016)



Top Destinations on the Book for German Leisure Long-haul Outbound
(%Var of Total OTB vs. Prev. Year; bookings as of 28th Feb 2016)



Total German Arrivals in Asia on the Book: **-2.9%**

Methodology and Glossary



- ▶ This analysis is based on Air Reservation Data property of ForwardKeys® as of 1st March 2016. Database contains reservations handled by more than 200 000 online and offline travel agencies worldwide. Database updated as of **28th February 2016**.

- ▶ **Perimeter:**
 - ▶ Destination: Worldwide
 - ▶ Source Market: Germany
 - ▶ Period:
 - ▶ **Arrival History**: 1st March 2015 to 27th February 2016.
 - ▶ **Arrivals on the book**: Arrival dates from **1st March to 31st August 2016** based on total bookings issued as of 28th February 2016 vs. the same period of previous year.
 - ▶ 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.

- ▶ **Cancellations** include modifications to any previously issued booking as well as final cancellation.

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