

***Middle East Outbound  
on the Book 2016  
For End-of-Ramadan Travel***

***June 2016***

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



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# Forward Looking International Departures Worldwide from the Middle East June to August 2016



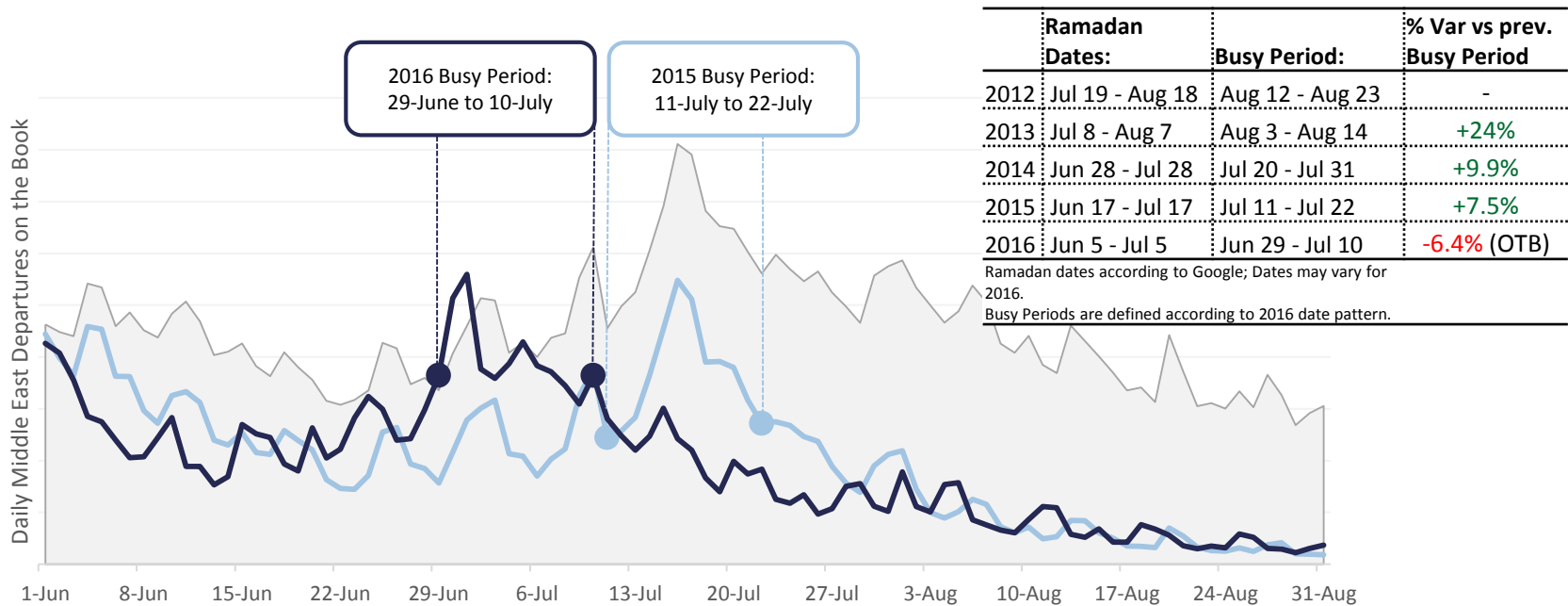
## Bookings for the Busy Departure Period Are Behind Last Year's

- Bookings are running 6.4% behind

**International Departures Worldwide from the Middle East, on the Book**  
(June 1<sup>st</sup> to August 31<sup>st</sup> 2016 vs. 2015 based on issued bookings as of May 28th 2015)

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Final Departures in 2015    2015 On the Book    2016 On the Book

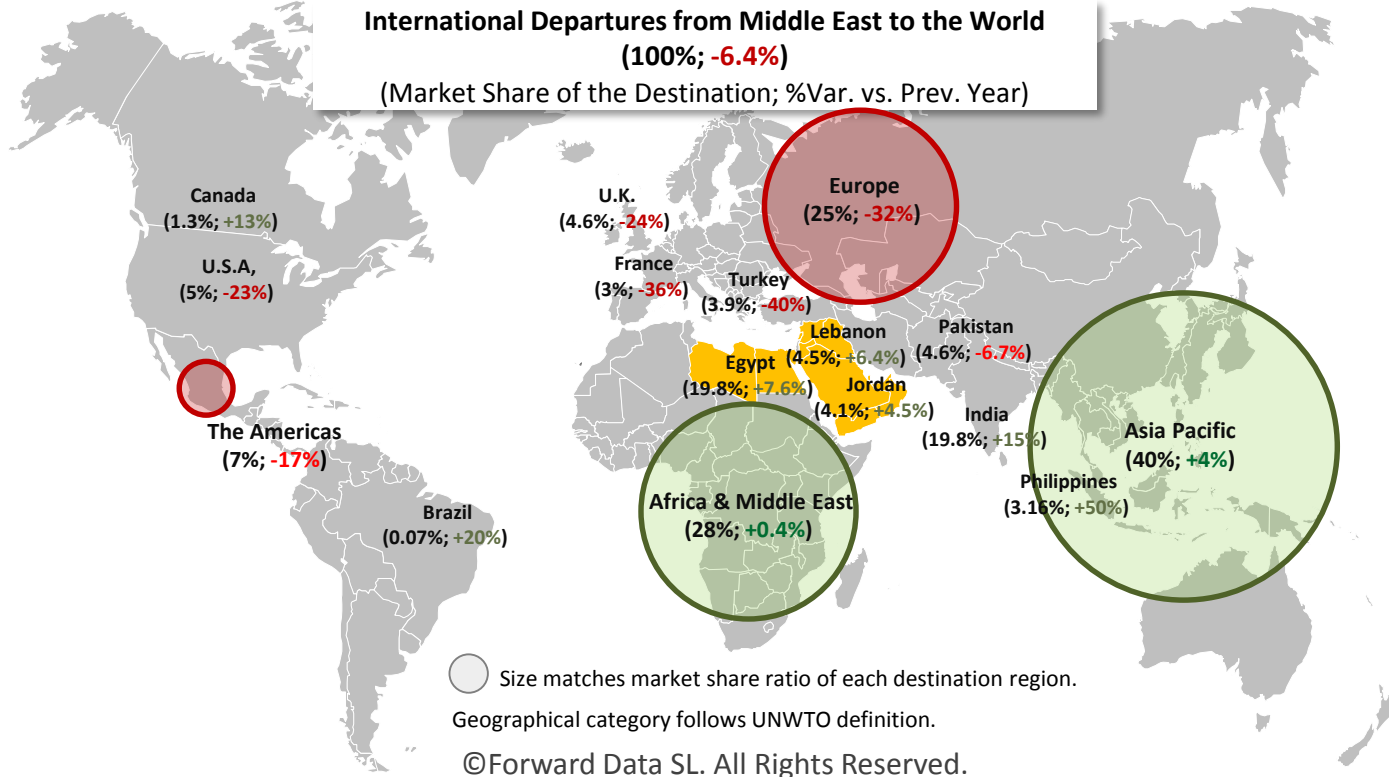


# Forward Looking International Departures Worldwide from the Middle East During the Busy Period 2016 vs. Busy Period 2015

## Asia Pacific is the Preferred Destination

- Comparing forward bookings for the busy period in 2016 to 2015, Europe and the Americas are suffering a deep decline in 2016. Terror attacks and health concerns could be behind these drops.
- Despite the bookings for Asia Pacific, Africa, & Middle East being above last year, visiting-friends-and-relatives destinations grow at the expense of leisure destinations, where travelling is more expensive.

**International Departures from Middle East to Each Region on the Book.**  
**Top 3 Destination Countries per Continent**  
 (Busy Period 2016 with bookings as of May 28<sup>th</sup> 2016 vs. Busy Period 2015 based on issued bookings as of June 10<sup>th</sup> 2015)



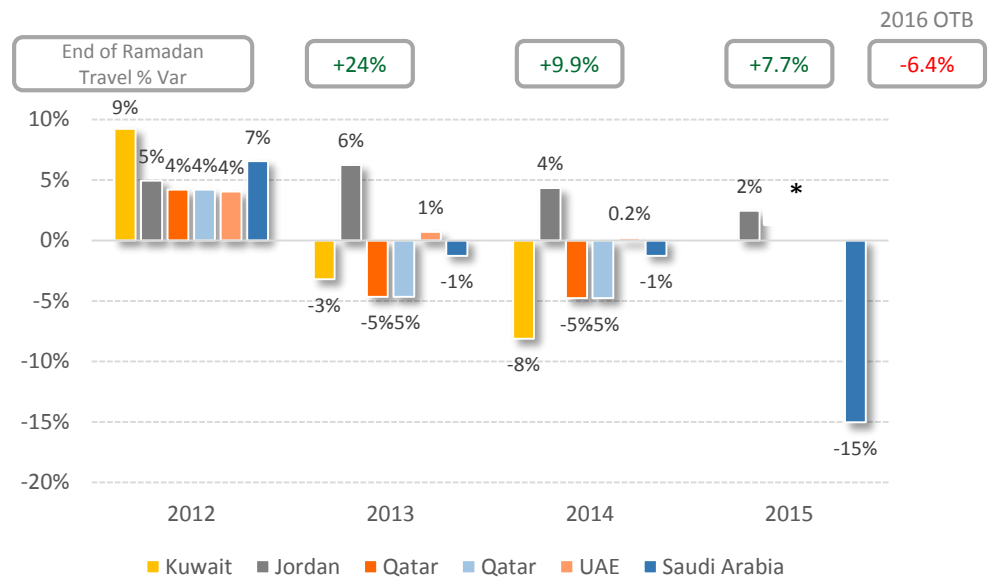
## Low Oil Prices and Slowdown in GDP Growth Hit Willingness to Travel

- Economies of the top source markets in Middle East have been shrinking over past years, suffering from oil price drops and directly hitting the total growth from Middle East for Ramadan's End busy season.

**Brent Oil Price Evolution**  
(Jan 200 – June 9<sup>th</sup> 2016) by Investing.com



**GDP per capita (USD) YoY % Variation**  
**Total Middle East YoY % Var for End of Ramadan Travel**  
GDP Data from Focus Economics



\* No GDP 2015 data available for UAE, Qatar or Kuwait

# Methodology and Glossary



- ▶ This analysis is based on Air Reservation Data property of ForwardKeys® as of 1<sup>st</sup> June 2016. Database contains reservations handled by more than 200 000 online and offline travel agencies worldwide. Database updated as of **28<sup>th</sup> May 2016**.
  
- ▶ **Perimeter:**
  - ▶ Destination: Worldwide;
  - ▶ Source Market: Middle East
  - ▶ Period:
    - ▶ **On the Book**: June 1<sup>st</sup> 2016 – August 31<sup>th</sup> 2016 vs June 3<sup>rd</sup> 2015 – September 2<sup>nd</sup> 2015 with bookings made as of May 28<sup>th</sup> 2016.
    - ▶ **“Busy Period” for End-of-Ramadan travel**: June 29<sup>th</sup> to July 10<sup>th</sup> 2016 vs July 11<sup>th</sup> to July 22<sup>nd</sup> 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.
  
- ▶ **Departures on the Book** : refer to the number of airline passengers departing 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.

*The content and the data provided in this document are for information only.*