



It's Travel for Christmas

 November 2016

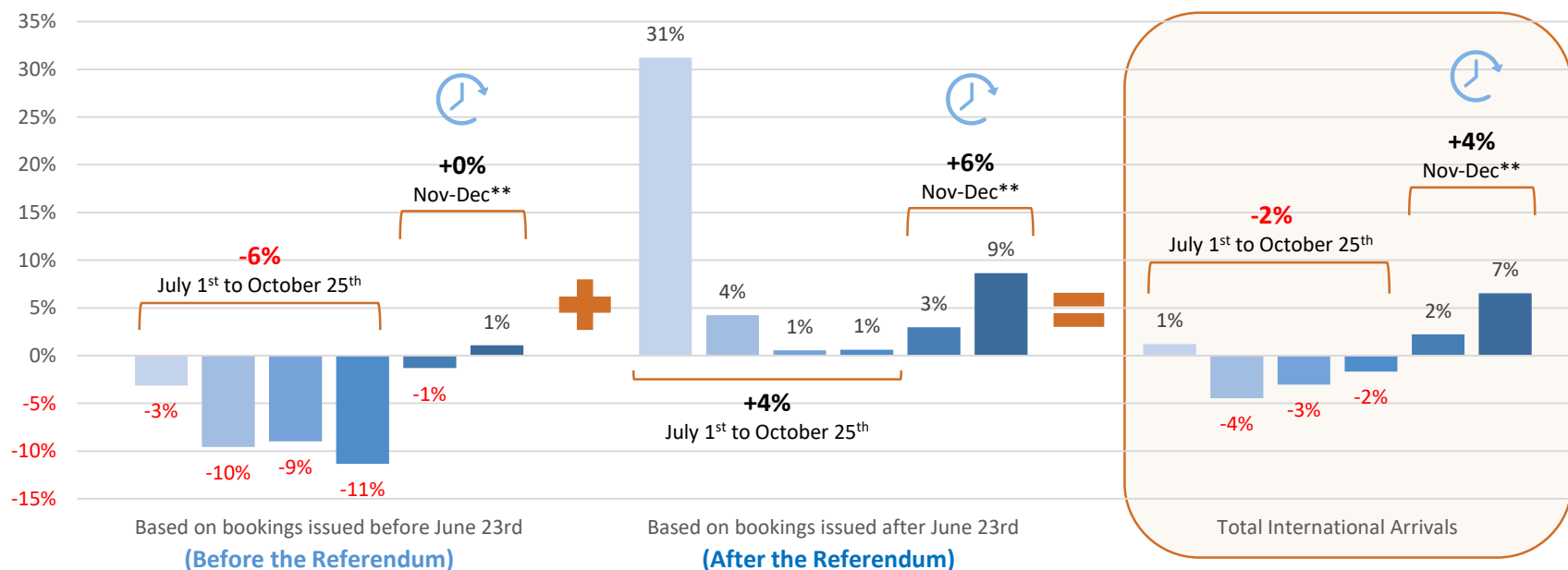
"Applied traveller operational intelligence to support tactical business decisions"



Inbound travel immediately boosted after the referendum

- There has been a clear impact of the referendum in the UK tourism industry. In terms of arrivals it is still early to discriminate the effect of the bookings issued before and after because the first have more weight this year, especially for the trends related to Summer.
- Analysing these bookings separately, the volume of bookings after June 23rd for arrivals in July 2016 skyrocketed by 31% as a result of the sterling depreciation. Nevertheless, this enthusiasm became blurred in the following months.
- There is, however, light on the horizon, in the form of very encouraging bookings for Christmas in London.

Long haul travellers visiting the United Kingdom after Brexit

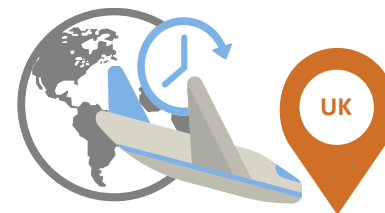


- July
- August
- September
- October*
- November**
- December**

Arrival dates from July 1st to December 31st 2016

*From 1st to 25th October

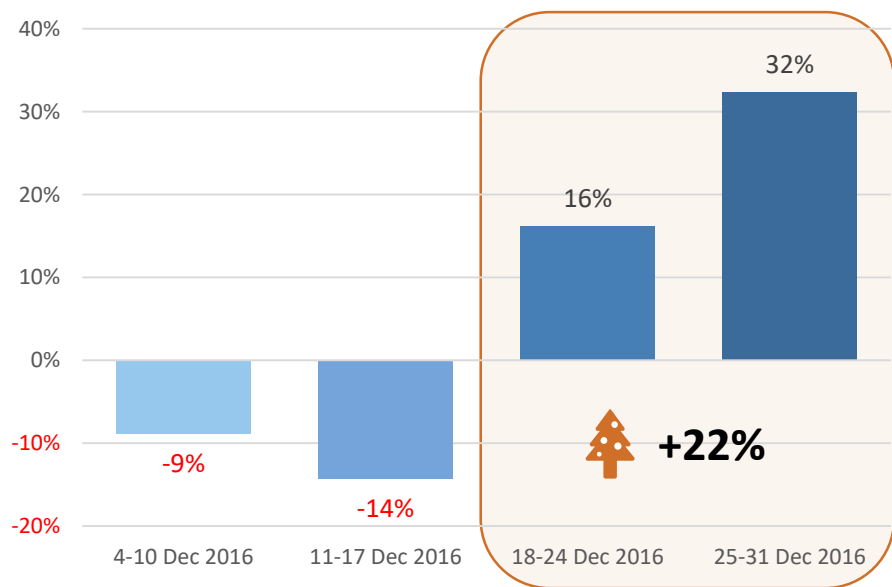
**Arrivals On The Book as of October 25th



Key opportunity at Christmas to convert the pound devaluation into business

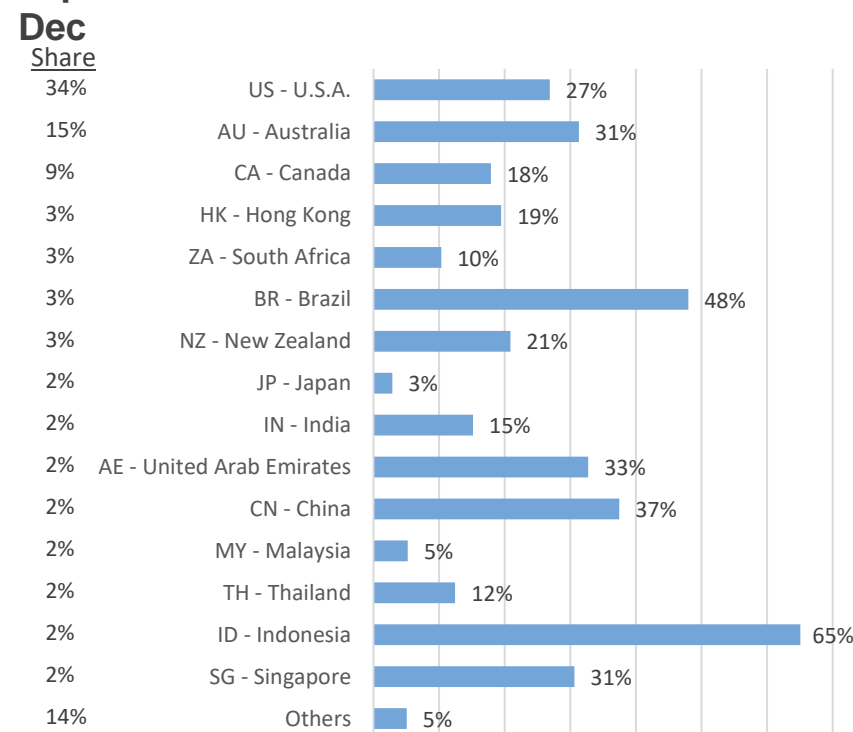
- When looking at arrivals on the book for the last two weeks of December – Christmas holidays-, they are up by 22% supported by the top 3 countries which are USA, Australia and Canada, the English speakers. Japan, very concerned about safety, is slightly up by 3%, which is a very good performance considering that this is a declining market for Europe after the terrorist attacks.
- Bookings from Hong Kong, given its historical relation with the UK, increased by +19%. It is the sixth country with a 3% share. Meanwhile China is the eleventh because Christmas is not a very relevant festivity for them although it is up by +37%.
- South Africa, another UK related market, grows 10% probably because the pound depreciation has cancelled out the effect of the rand depreciation.

Long haul travellers visiting the United Kingdom during Christmas holidays



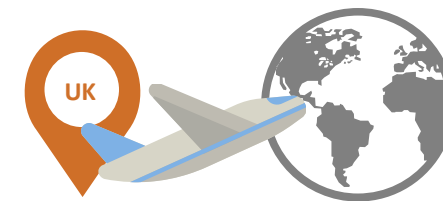
Arrival on the book from December 1st to December 31st 2016 as of October 25th

Top 15 countries for arrivals in 18-31 Dec

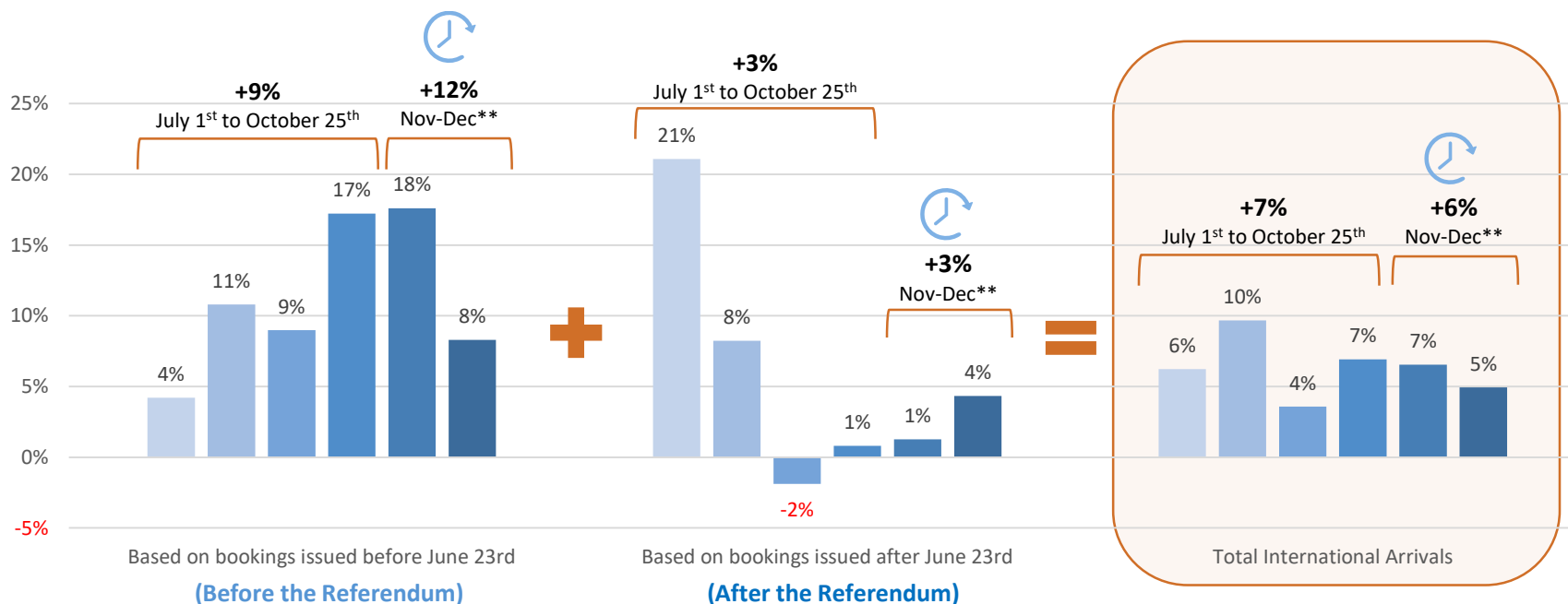


Positive first reaction in outbound travel, slowing down afterwards

- Departures from the UK have not seen a decline partially due to very good performance of previous bookings and some uncertainty period – just after the referendum - when travellers from the UK continued booking and travelling, accepting the lost of purchasing power.
- However, departures in September, based on booking issued after the referendum, dropped to -2% and slowed down to +1% in October while the performance of booking issued before was +9% and +17%, respectively.
- Departures on the book for November and December are +6% above last year volumes thanks to the Christmas period.



Long Haul Departures from the United Kingdom after Brexit



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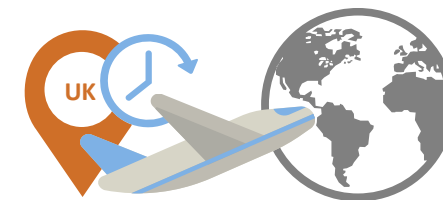
Departure dates from July 1st to December 31st 2016

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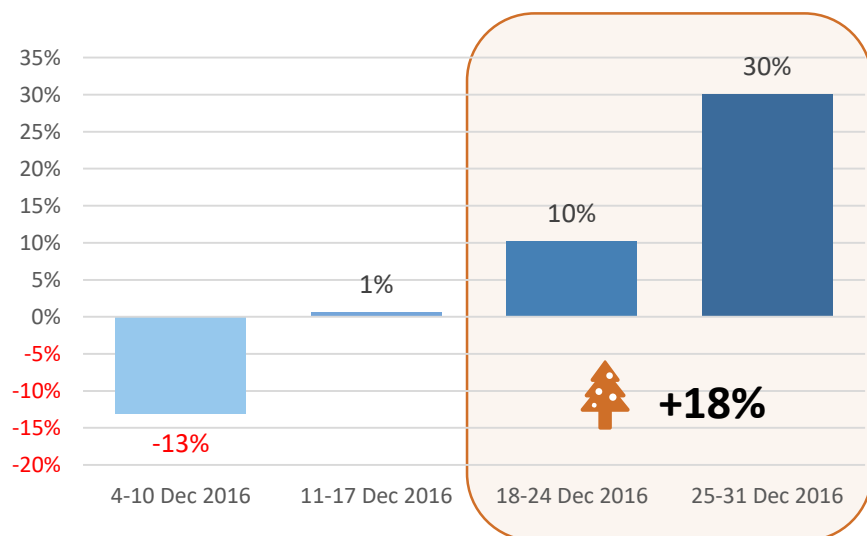
**Arrivals On The Book as of October 25th

Travellers from the United Kingdom will still planning to enjoy Christmas abroad

- Although travelling for Brits is becoming more expensive, they still want to travel abroad at Christmas. The number of departures on the book for the last two weeks of December are up 18%.
- Saudi Arabia and Canada grow sharply by 76% and 66% respectively. The U.S.A, with the highest share, rise by 25%. United Arab Emirates and Australia, with important shares, are increasing slightly by 3%.

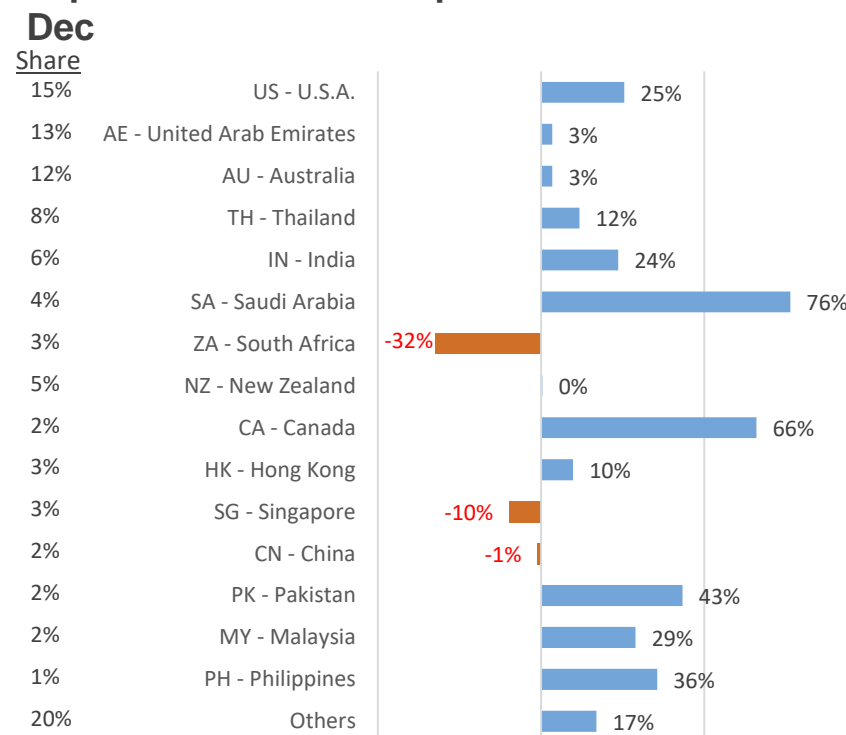


Long Haul Departures from the United Kingdom during Christmas holidays



Departure on the book from December 1st to December 31st 2016 as of October 25th

Top 15 countries for departures in 18-31 Dec



Methodology & Glossary

This analysis is based on Air Reservation Data property of ForwardKeys® as of 31st October 2016. Database contains reservations handled by more than 200 000 online and offline travel agencies worldwide

LOCATION



The United Kingdom

MARKET



Long haul market. European countries excluded.

PERIOD



Arrivals & Departures: From 1st July to 25th October 2016.

Arrivals/Departures On The Book: November to December 2016 as of 25th October 2016.

Lengths of stay: Visitors staying at least 1 night at the destination. Excluding return home, transits, day trips and one-ways.



Arrivals: refer to the number of airline passengers arriving at the destination within a specific time frame.

Arrivals on the Book (Arrivals OTB): 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.

Departures: refer to the number of airline passengers departing from any location within a specific time frame.

Departures on the Book (Departures OTB): 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. UK) for any date of travel.

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