

Q2 2015

# Global Travel Insights



 **SOJERN**

April to June 2015

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## SOJERN'S GLOBAL TRAVEL INSIGHTS

For this report, Sojern analyzed travel behavior worldwide in five regions: Asia-Pacific, Europe, Latin America, Middle East & Africa, and North America. The data provided in this report is based on search and booking behavior provided by major airlines, online travel agencies (OTA's), meta-search, and other travel service providers. Airline searches and bookings from more than a billion traveler intent data points were analyzed to better understand how online consumer travel trends are changing.

Sojern's quarterly Global Travel Insights reports are broken down into two sections. The first, called "**Analysis of Recent Travel Trends**," analyzes actual travel activity to explain shifts in travel patterns during the previous quarter. We then capitalize on our access to future travel intent data for the second section, called the "**Travel Trends Forecast**." Sojern extracts actionable insights on the stated and predicted behavior of future travelers who research during the quarter. This section is an invaluable tool for enabling real shifts in marketing strategies that take advantage of probable future patterns.

## Q2 2015 GLOBAL TRAVEL TRENDS: THE BIRD'S EYE VIEW

Looking back at the second quarter of 2015, we analyzed early summer travel trends across several regions and tracked destinations which saw the most dramatic fall or rise in traveler interest. Compared with the previous two quarters, travelers across origin regions searched for destinations much closer to home, eschewing long-haul trips in favor of domestic and regional trips.

Globally, the most searched countries during the second quarter of the year were the United States, Spain, Italy, the United Kingdom, Germany, France, Portugal, Turkey, Greece and Russia. Russia re-entered the list after a quarter's hiatus, replacing Thailand, possibly due to the devaluation of the ruble, which made travel to Russia more affordable than it has been in recent years.

Beyond the top 10, destinations that captured the most incremental traveler interest for North Americans were Haiti, which moved up 34 ranks since summer 2014, Iceland, and the US Virgin Islands. Haiti seems to finally be recovering from the earthquake that devastated the country five years ago and is welcoming more tourists again. For West Europeans, Cuba, Czech Republic, Iceland, and Romania climbed the most in the past year.

The list of top destinations for other origin regions we studied showed significantly fewer fluctuations in destination interest quarter-on-quarter, with the Philippines showing an increase in interest from Southeast Asian travelers, and Egypt and Turkey overtaking Germany for travelers from the Middle East.

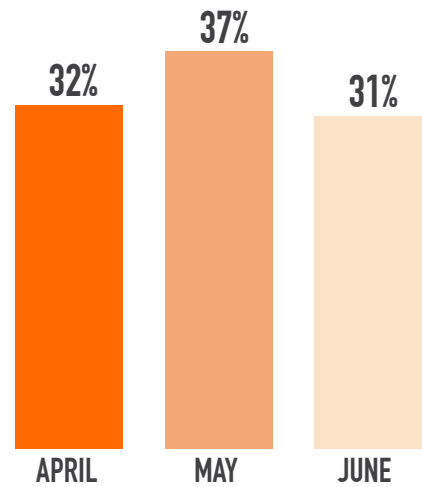
Destinations that had the most dramatic drops in traveler interest over the past three quarters were the United Arab Emirates, which dropped a whopping 38 ranks in North American interest since Q4 2014, and New Zealand, which dropped 30 spots in European rankings. As the quarters progressed, South Africa lost interest on both sides of the Atlantic ocean, as travelers gradually shifted resources to destinations closer to home.

Cuba continued its upward trajectory this past quarter, moving up another spot since Q1, to position 14 on the list of top 20 most popular destinations in the Caribbean for Americans. That is a five-place jump up from number 19 back in December 2014, which means that Cuba now ranks higher than Antigua and Barbuda, Curacao, Grenada, Saint Kitts and Nevis, and the British Virgin Islands.

Greece, in spite of its financial difficulties, remains a magnet for tourists worldwide. Over the past two quarters, we've seen Greece remain in the top 10 most searched destinations globally and in the top 10 most popular destinations for Europeans. As a side note, Greece dropped in the latter list by four places to position number eight in the last quarter. Immediately following the announcement of the referendum on June 27, travel intent numbers to Greece went down about 23% globally, but following the end of the referendum on July 5, Sojern was already noting a rebound in interest numbers. It remains to be seen whether interest will materialize in actual bookings later this summer.

If you have questions about any of the trends we forecasted and analyzed in this report, please email Sojern's public relations department at [pr@sojern.com](mailto:pr@sojern.com).

*Share of Q2 2015 Search Volume by Month*



*Top 10 Countries Searched*

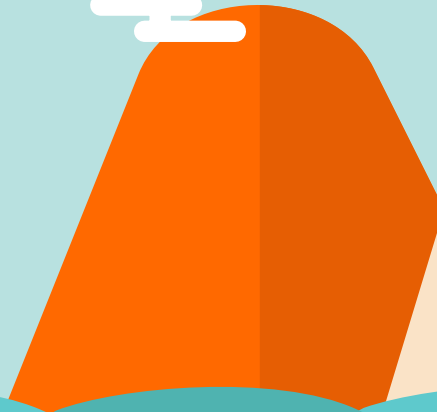






## SECTION I

# Analysis of Recent Travel Trends



EARLY SUMMER TRAVEL TRENDS

North America, Western Europe, Latin America, Asia-Pacific and the Middle East

North American and European travelers who searched in Q2 for summer travel were laser-focused on short-haul and domestic travel. Not a single international city made Americans' top 10 list. In Europe, London took the lead in cities, while Spain remained the champion for country searches.

This is in sharp contrast to summer planning from previous quarters. For context on travel searches during Q2, Sojern looked at summer travel searches during the previous two quarters and found that the appetite for long-haul travel decreased quarter by quarter in both North America and Europe. In Q4 of 2014, North American travelers had their sights set on international travel, with four of the top 10 destination cities in Europe. At that time, London topped the list, followed by Paris, Cancún, and Rome. Travelers from Western Europe also dreamt of more long-haul travel: New York, Los Angeles, San Francisco and Miami in the States and Bangkok in Asia all made their top 10.

The following quarter, January through March 2015, showed more conservative travel inclinations on both sides of the pond. Americans narrowed down their international city destinations to London and Paris, which tumbled down the list to positions four and eight, respectively. Similarly, only New York, Los Angeles and Bangkok remained in the top for Europeans during the first quarter of the year.

North America: Summer Travel Searches Conducted During Q2 2015

Rank	Countries	Cities
1	United States	Las Vegas
2	Mexico	New York City
3	Canada	Chicago
4	United Kingdom	Los Angeles
5	Italy	San Francisco
6	France	Orlando
7	Spain	Dallas-Fort Worth
8	Dominican Republic	Fort Lauderdale
9	Puerto Rico	Denver
10	India	Boston

Western Europe: Summer Travel Searches Conducted During Q2 2015

Rank	Countries	Cities
1	Spain	London
2	Italy	Barcelona
3	United Kingdom	Palma De Mallorca
4	United States	Lisbon
5	Germany	Berlin
6	France	Paris
7	Portugal	Malaga
8	Greece	Amsterdam
9	Turkey	Ibiza
10	Netherlands	Madrid



*The Middle East: Summer Travel Searches Conducted During Q2 2015*

Rank	Countries	Cities
1	Turkey	Cairo
2	Egypt	Istanbul
3	Germany	Izmir
4	United States	London
5	India	Antalya
6	United Kingdom	Jeddah
7	Saudi Arabia	New York City
8	Italy	Paris
9	France	Munich
10	Spain	Alexandria

*Southeast Asia: Summer Travel Searches Conducted During Q2 2015*

Rank	Countries	Cities
1	Thailand	Bangkok
2	Indonesia	Denpasar
3	Malaysia	Singapore
4	Philippines	Hong Kong
5	United States	Phuket
6	Vietnam	Kuala Lumpur
7	Australia	Manila
8	Singapore	London
9	United Kingdom	Ko Samui
10	Hong Kong	Jakarta

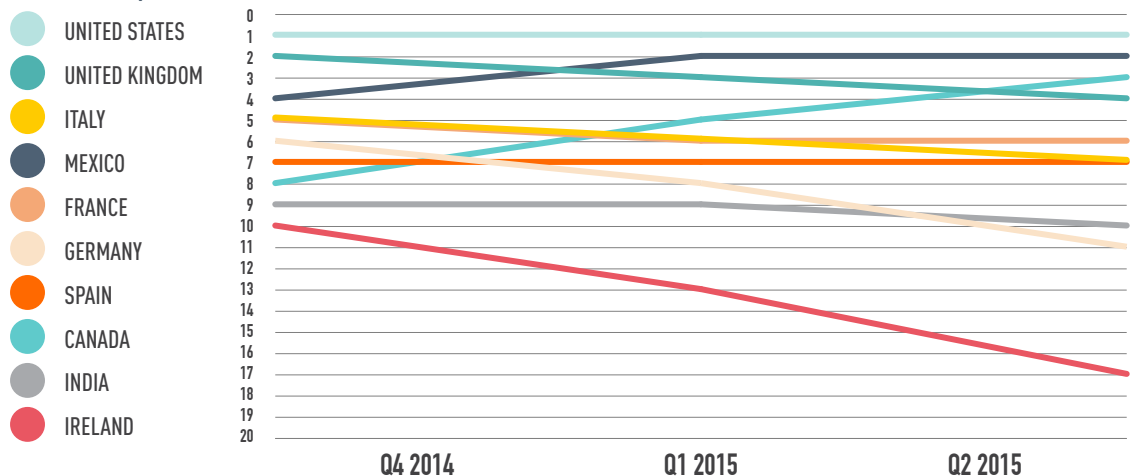
*Latin America: Summer Travel Searches Conducted During Q2 2015*

Rank	Countries	Cities
1	United States	Fort Lauderdale
2	Mexico	New York City
3	Brazil	Madrid
4	Spain	Cancún
5	Colombia	Orlando
6	Italy	Miami
7	Peru	Tijuana
8	France	Los Angeles
9	Germany	Mexico City
10	Argentina	Barcelona

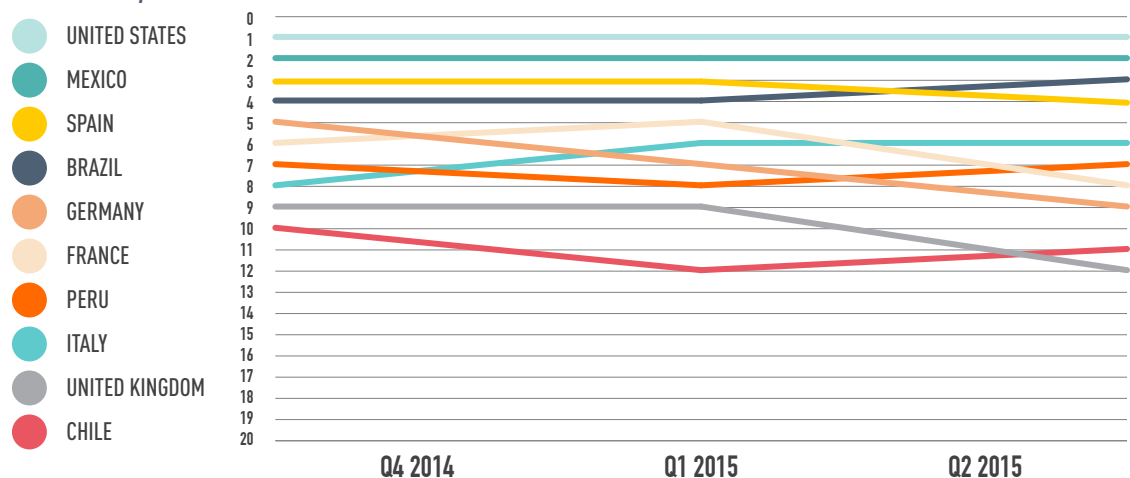
Summer Destinations: Fluctuations in Traveler Interest

Throughout the three quarters examined, most of the top 10 destinations remained stable for all of the regions studied. Canada (for North Americans) and the UK (for Europeans) were the two top 10 destinations that showed the steadiest rise in ranking for traveler interest across the three quarters, while Thailand (Western Europe) and Ireland (North America) showed the most dramatic drops in searches.

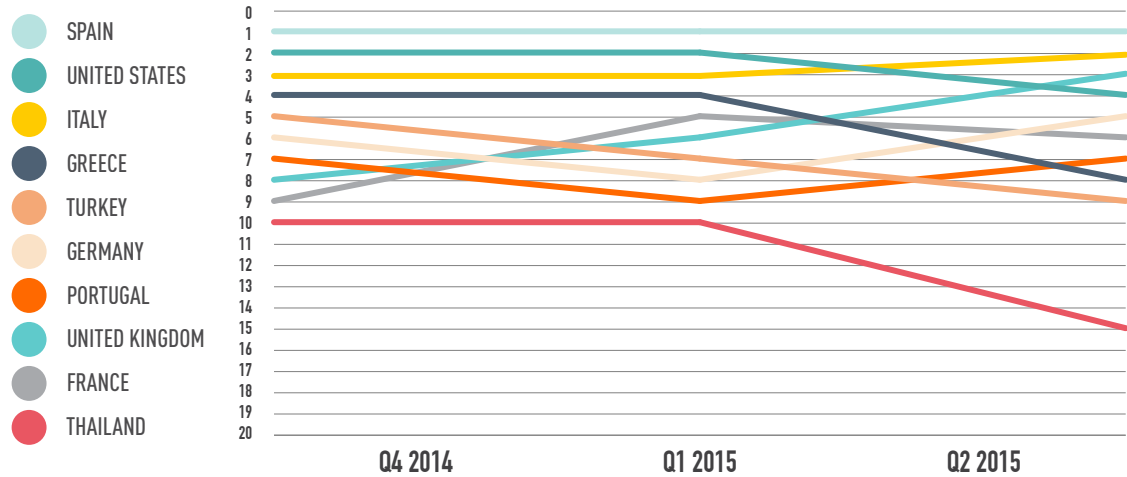
Shifts in Top 10 Over the Last 3 Quarters: North America



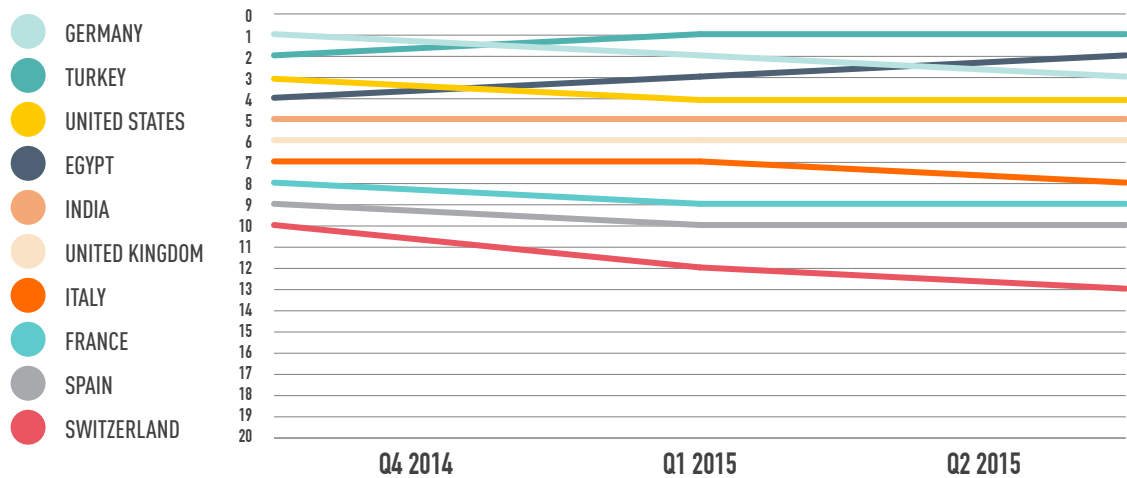
Shifts in Top 10 Over the Last 3 Quarters: Latin America



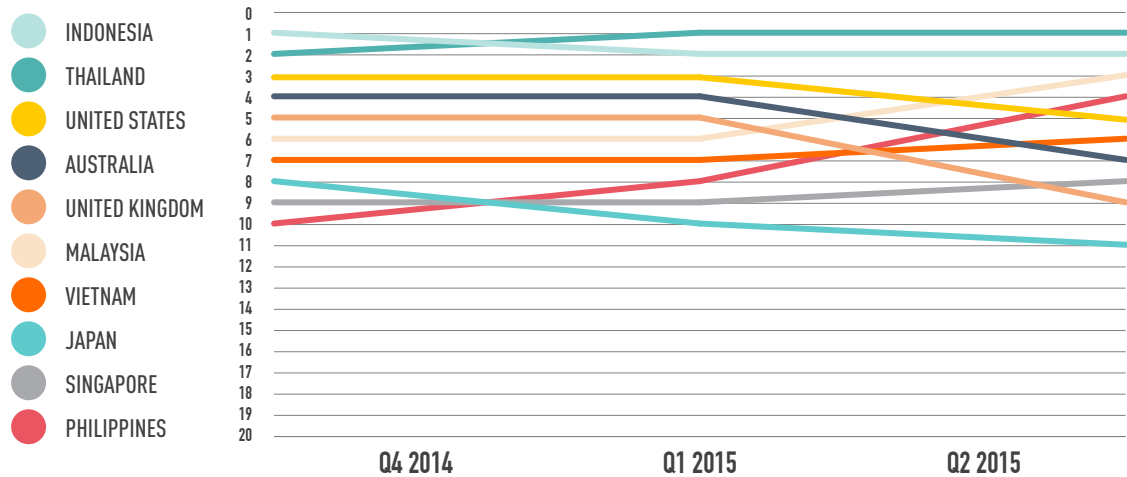
*Shifts in Top 10 Over the Last 3 Quarters: Europe*



*Shifts in Top 10 Over the Last 3 Quarters: The Middle East*



*Shifts in Top 10 Over the Last 3 Quarters: Southeast Asia*



### Beyond Top 10 in the US and Europe: Biggest Gains & Biggest Drops

Compared to Summer 2014, the biggest winners for North American travelers are Haiti, which moved up 34 ranks to position 19 despite its continued slow recovery from the 2010 earthquake, Iceland, up 11 spots, and the US Virgin Islands, up nine spots.

Western European travelers became increasingly interested in Cuba as the quarters progressed, pushing it up 12 places to position 41, followed by Czech Republic, Iceland, and Romania, each of them moving seven places up in the ranking.

For travelers from Latin America, Aruba's appeal increased over last year, pushing it up 11 spots, followed by Hungary, up 10 positions.

In Southeast Asia, Bangladesh moved up eight spots and Qatar seven since summer 2014. Croatia also saw gains, moving up six positions, and Norway and the Maldives both climbed up five spots in the rankings for Southeast Asian travelers since last summer.

For travelers from the Middle East, Sudan gained the most popularity and was up 24 spots, followed closely by Bosnia and Herzegovina with a 21 spot climb, a country which the World Tourism Organization estimates will have the third highest tourism growth rate in the world by 2020. Next up were Ethiopia and Algeria, by 16 and 14 positions, respectively.

The United Arab Emirates dropped a whopping 38 spots in North American interest since Q4 2014 and New Zealand dropped 30 spots in European rankings, which could have been influenced by the end of the Cricket World Cup in Australia and New Zealand. South Africa dramatically lost travelers' interest on both sides of the Atlantic Ocean as travelers decreased their perimeter of search each quarter.

Q2 TRAVEL: NORTH AND LATIN AMERICA

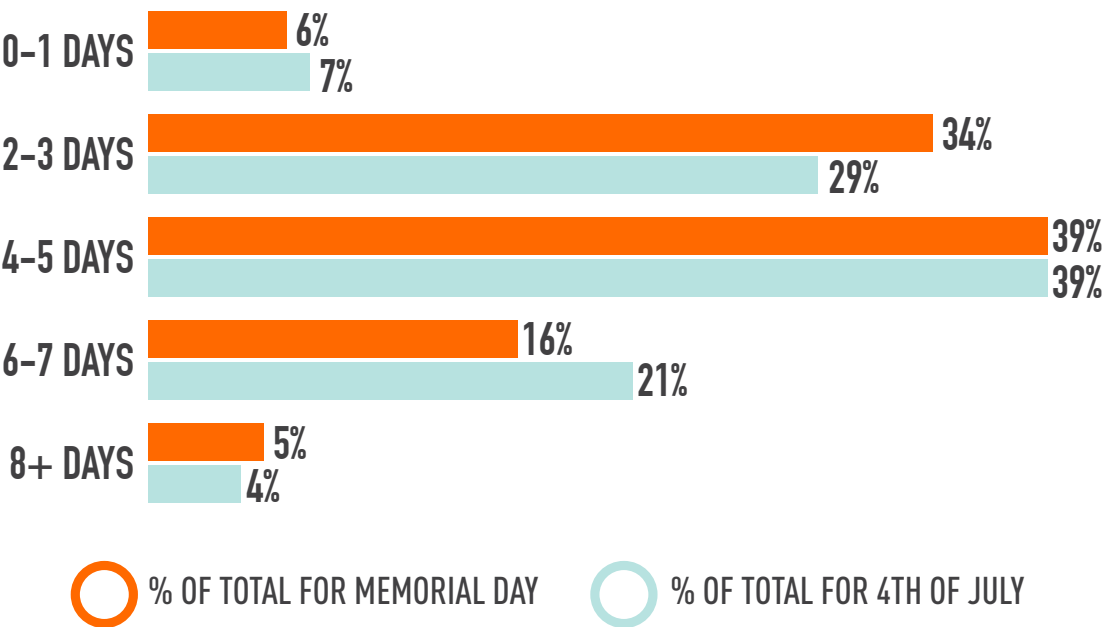
Seasonal Travel Events

MEMORIAL DAY AND INDEPENDENCE DAY IN THE US

Looking at travelers who booked their fourth of July flights a week or more before the holiday, the most popular destinations were New York, Las Vegas, Miami, Chicago, and Los Angeles. London remained America's favorite international destination even on the fourth of July this year, a preference possibly reinforced by the Wimbledon tournament overlapping with the holiday (June 29 - July 12), followed by Cancún, Mexico and San Juan, Puerto Rico. Compare that with Memorial Day weekend earlier this year, when the top five booked destinations were New York, Chicago, Las Vegas, Los Angeles, and Dallas.

This Independence Day weekend, 39% of travelers took trips lasting 4-5 days and 25% planned getaways of more than six days. Compare that with Memorial Day, when only 19% of travelers looked at trips longer than six days, or even more dramatically with Thanksgiving last year, which, in spite of the fact that most Americans get two days off for the holiday, only saw 10% of travelers take more than six days off.

*Trip Durations: A Comparison Between Memorial Day and Independence Day 2015*



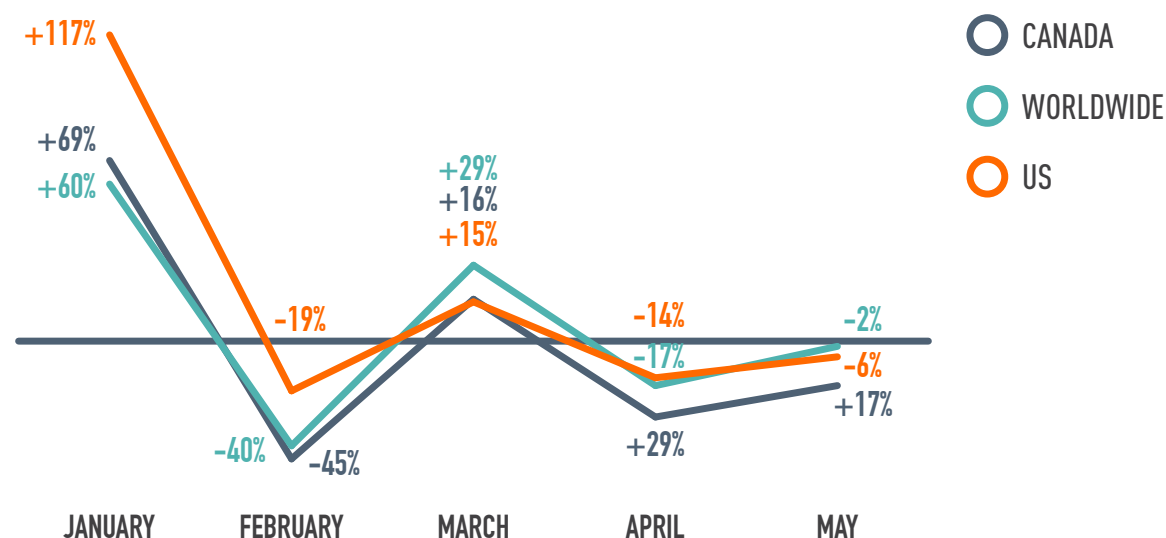
## REVISITING TRAVEL TO CUBA AND THE CARIBBEAN

As of June 25, Cuba had moved to position 14 on the list of top 20 most searched destinations in the Caribbean for Americans, a five-place jump up from number 19 back in December 2014. Cuba now ranks higher than Antigua and Barbuda, Curacao, Grenada, Saint Kitts and Nevis, and the British Virgin Islands.

Rank	April 2015	May 1, 2015 – June 25, 2015	Change in Position
1	Dominican Republic	Dominican Republic	-
2	Puerto Rico	Puerto Rico	-
3	Jamaica	Jamaica	-
4	US Virgin Islands	US Virgin Islands	-
5	Bahamas	Bahamas	-
6	Haiti	Aruba	-1
7	Aruba	Haiti	+1
8	Sint Maarten	Sint Maarten	-
9	Turks and Caicos	Turks and Caicos	-
10	Cayman Islands	Cayman Islands	-
11	Barbados	Saint Lucia	+2
12	Saint Lucia	Trinidad and Tobago	+1
13	Trinidad and Tobago	Barbados	+1
14	Antigua and Barbuda	Cuba	-1
15	Cuba	Antigua and Barbuda	+1
16	Curacao	Curacao	-
17	Saint Kitts and Nevis	Grenada	-1
18	Grenada	Saint Kitts and Nevis	+1
19	British Virgin Islands	British Virgin Islands	-
20	Dominica	Dominica	-

Traveler interest in Cuba over the past two quarters was closely tied to media coverage of new developments, both in the US and worldwide. Sojern recorded a 300% increase in searches when the relaxation of travel restrictions took effect on January 15, a 73% increase when the European Union and Cuba agreed to speed up the pace of talks on March 24, and a 85% increase on April 2, when Airbnb announced it was hosting properties from Cuba.

### Searches to Cuba



Searches to Cuba increased by 31% worldwide on April 12, the day after President Obama and Cuban President Raul Castro met in person for the first time.

In April and May, searches to Cuba from the US and worldwide dipped somewhat, likely due to seasonal fluctuations.

### COPA AMÉRICA TRAVEL TO CHILE

Overall, the top five countries that searched for travel around Copa América (June 11- July 4) were the US, Chile, Colombia, Brazil, and Spain. Compare that with early searchers from December, when the UK made the top five before Chileans started their travel searches. One consideration to note is that the heavy interest from US travelers could be due to Central and South American soccer fans currently residing in the US.

The top five origin cities paint a slightly different picture, with pockets of soccer fans concentrated in the capitals of Latin American countries and Spain.

Most Copa travelers looked to travel solo (62%). More than a quarter (28%) looked to travel in pairs. Travelers tended to stretch out their trips; on average about 72% looked for trips of six days or longer.

Rank	Top Searching Origin Cities*
1	Santiago, Chile
2	Bogota, Colombia
3	Caracas, Venezuela
4	Madrid, Spain
5	Lima, Peru
*Searching to fly to Chilean host cities during and around Copa dates	

In terms of duration, Colombians lead the way for most long trips, with 77% searching for trips of eight days or longer, followed by US travelers, with 62% looking at trips of eight days or longer. At the other end of the duration spectrum, Chileans, Peruvians, and Argentinians looked at the most single day trips, likely due to proximity. Fifteen percent of Chileans and Peruvians and 13% of Argentinians searched for single day trips.

## North America and Latin America Outbound and Last-Minute Travel Trends

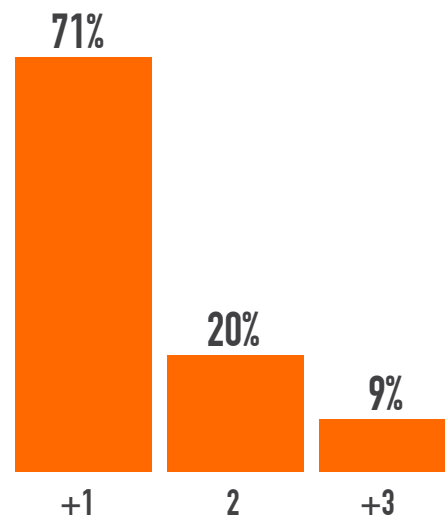
## OUTBOUND TRENDS DURING Q2 2015

## NORTH AMERICA

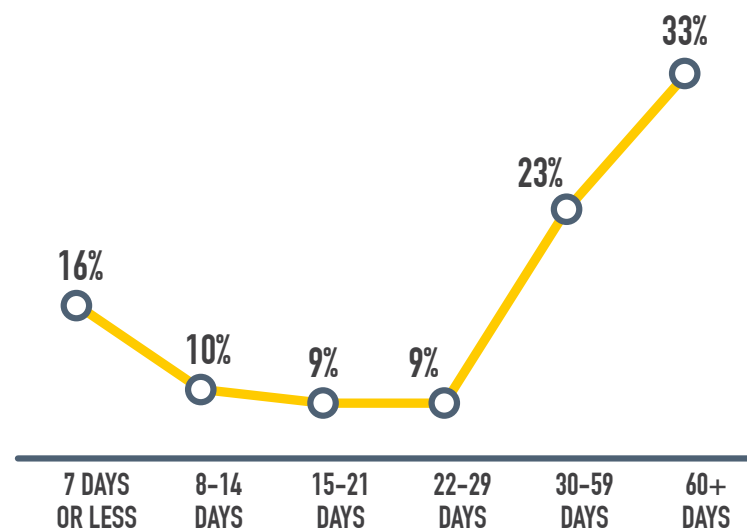
## Most Searched Destinations (Outbound)



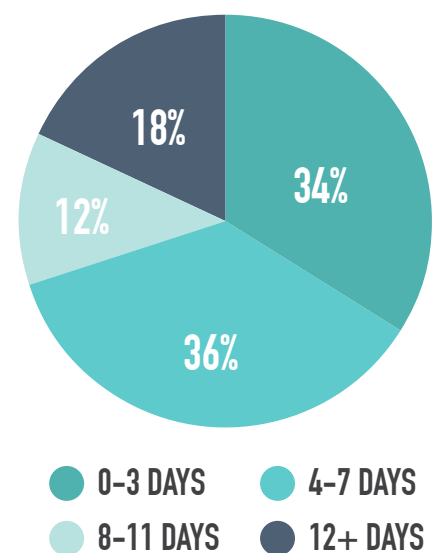
## Party Size Searched



## Search Lead Time



## Duration Searched



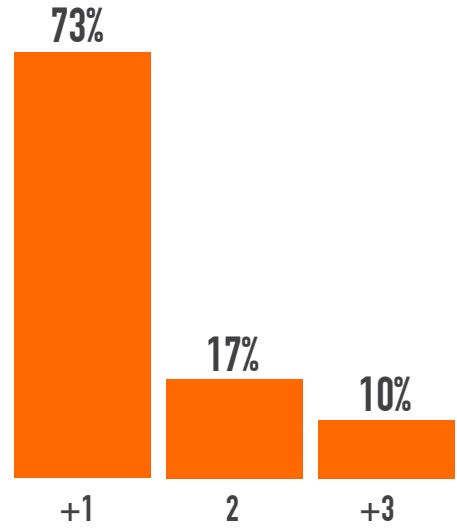


LATIN AMERICA

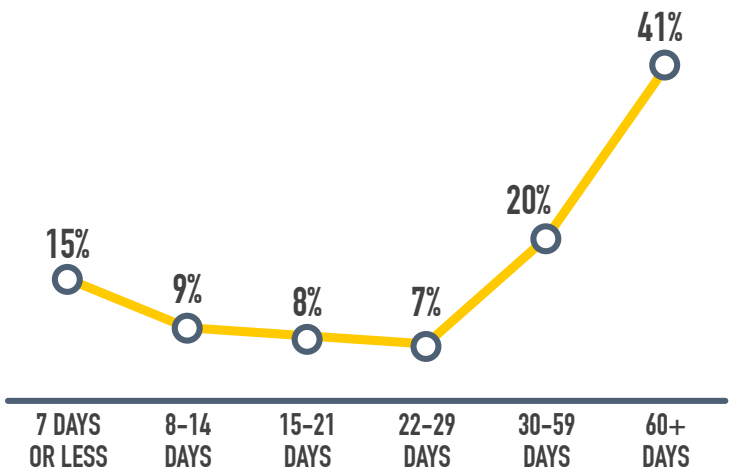
Most Searched Destinations (Outbound)



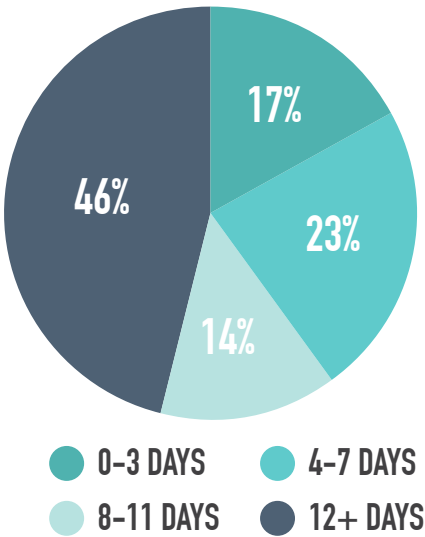
Party Size Searched



Search Lead Time



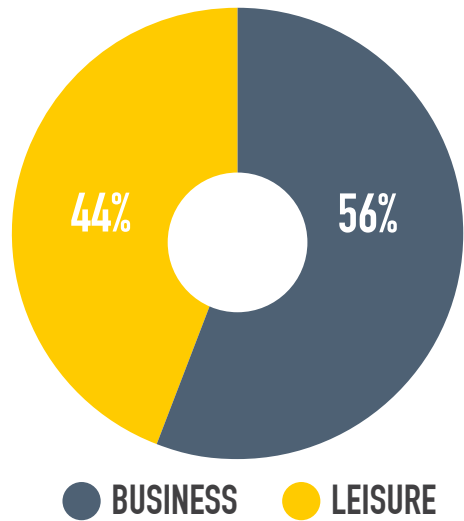
Duration Searched



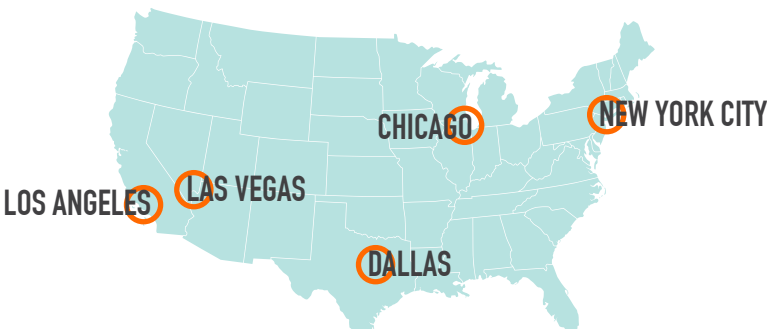
LAST-MINUTE TRAVEL: BUSINESS VS. LEISURE BOOKING AND LEISURE TRAVEL TRENDS

NORTH AMERICA

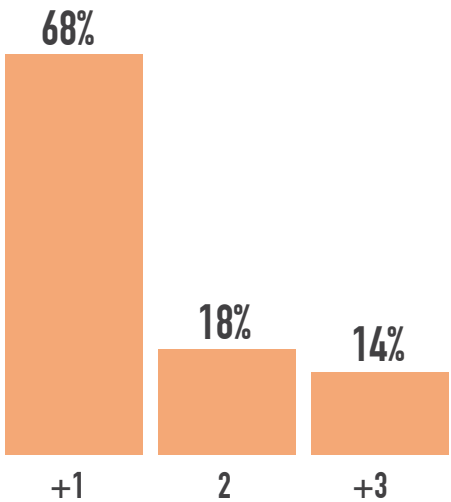
*Business vs. Leisure*



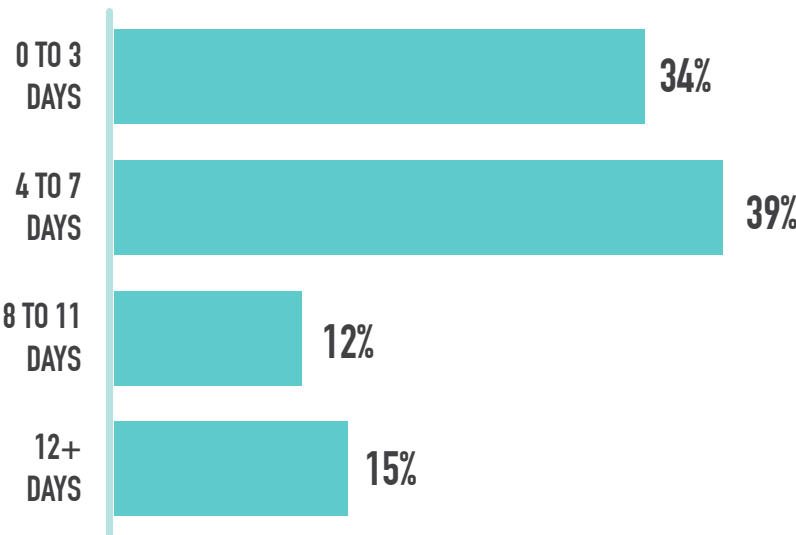
*Top 5 Destinations in Q2 2015*



*Party Sizes*

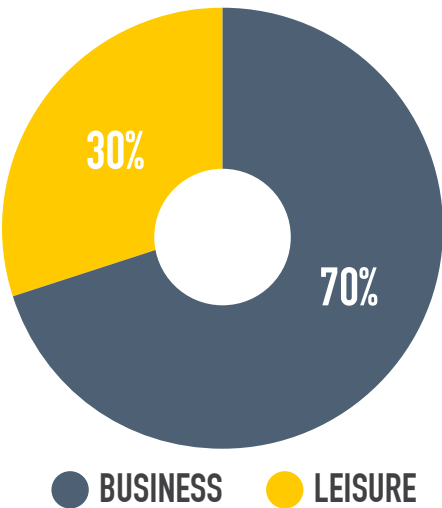


*Trip Duration*



LATIN AMERICA

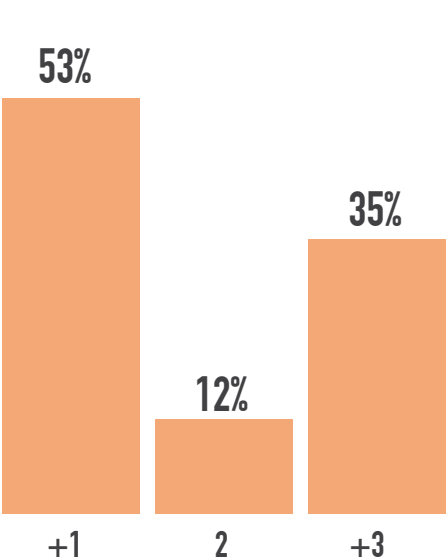
Business vs. Leisure



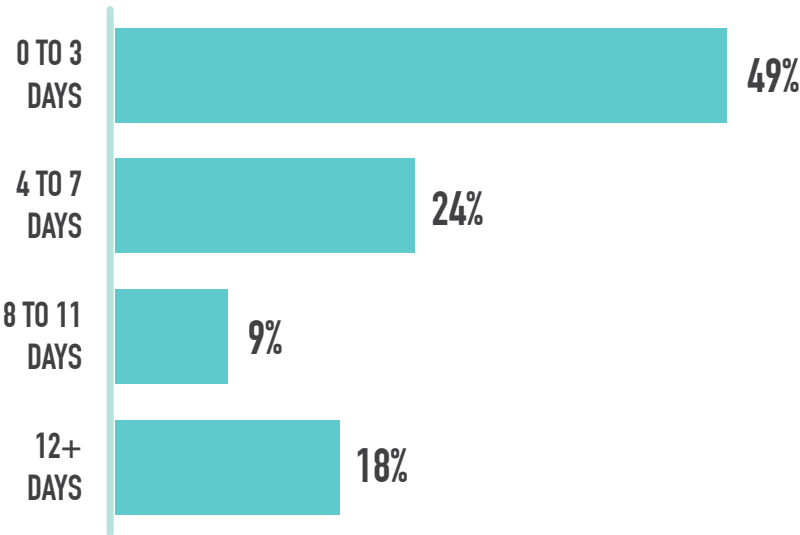
Top 5 Destinations in Q2 2015



Party Sizes



Trip Duration



## Q2 TRAVEL: EUROPE, MIDDLE EAST AND AFRICA

### Seasonal Travel Events

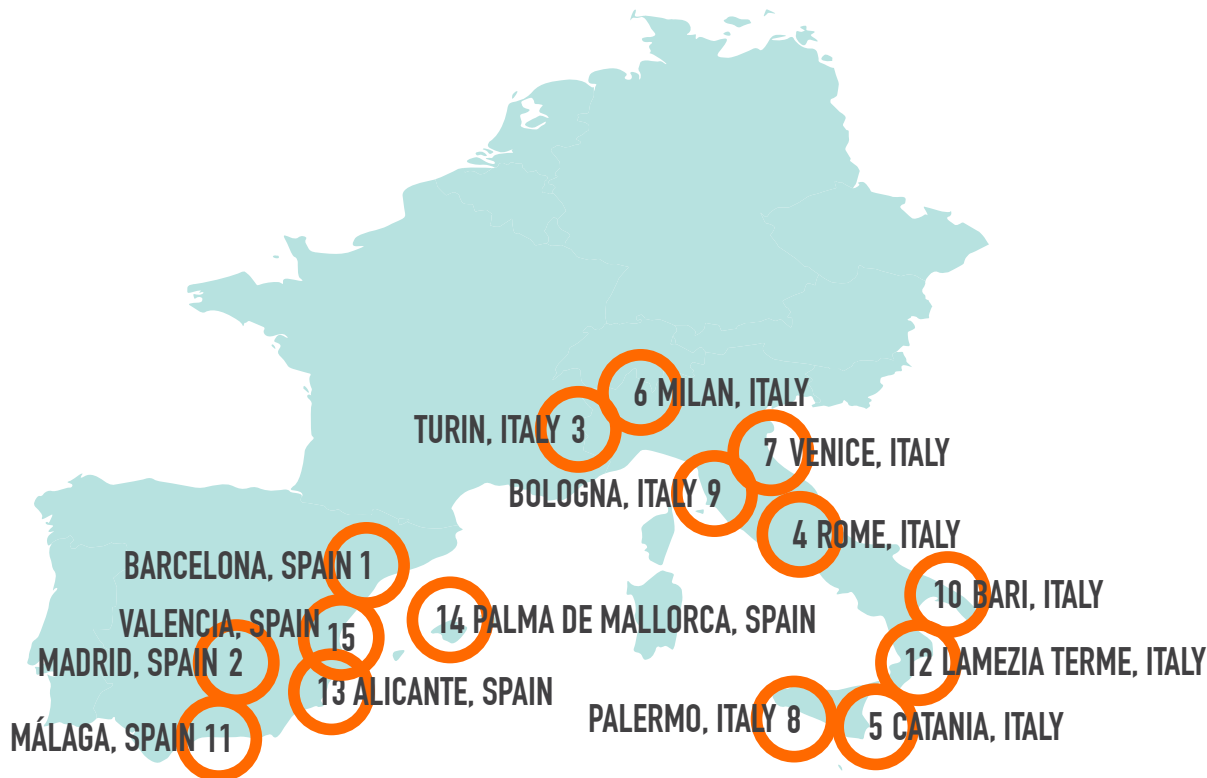
#### TRAVEL FOR THE UEFA (UNION OF EUROPEAN FOOTBALL ASSOCIATION) CHAMPIONS LEAGUE FINAL

On June 6, soccer aficionados watched with bated breath the outcome of the UEFA Champions League Final, held in Berlin, where Spain's FC Barcelona defeated Italy's Juventus Turin in what is generally considered the biggest world event in club football.

In April, about 20% more travelers from Italy than from Spain looked to travel to Berlin, however during the dates closest to the Champions League Final, the ratio was reversed, with 50% more Spaniards than Italians looking for flights to Berlin. Two explanations are possible for this phenomenon - either Barcelona fans were more confident that their team would win the final or more Juventus fans drove to Berlin.

Barcelona and Madrid were the top two cities with soccer fans traveling to Berlin the weekend of the final, while Italian cities Turin, Rome, and Catania completed the top five of origination cities.

#### *Rank of Origin Cities for Most Travel to Berlin During the UEFA Champions League Final:*



Both Barcelona and Turin hit a 1,400% week-on-week growth for last-minute flights to Berlin on Saturday, June 6. Spanish fans stayed somewhat longer in Germany than their Italian counterparts, with 66% taking 2-3 day trips vs. 43% of Italians.

Beyond Spain and Italy, the Swiss and Austrians were next most interested in travel to the event. We saw a fourfold increase week-on-week in searches for these dates by Swiss travelers and a 70% increase from Austria. On the flip side, Russia and France stayed away. Sojern data showed a 15% decrease in interest in travel to Berlin from the two countries around the same dates.

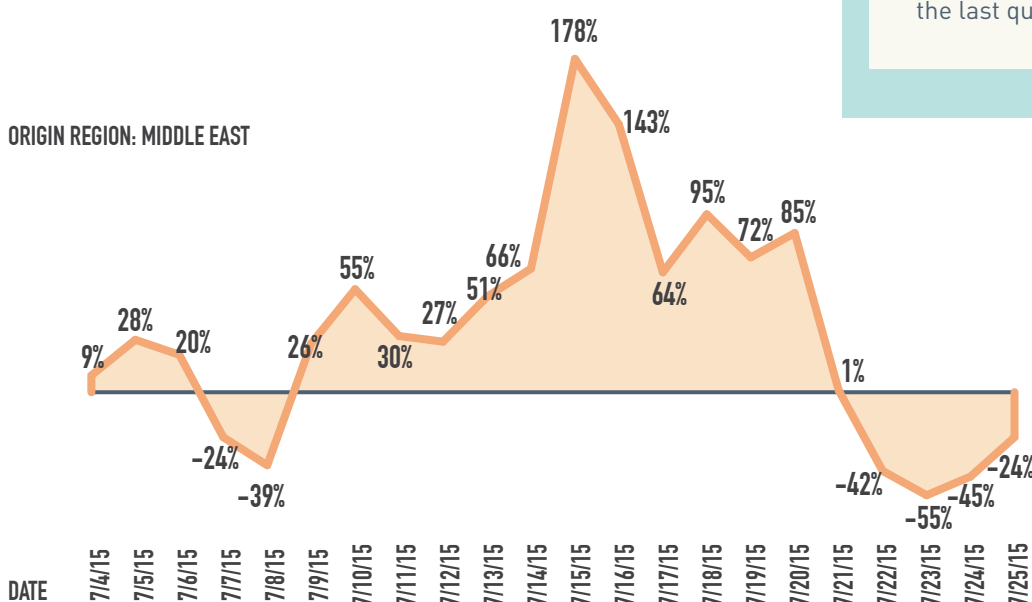
### POST-RAMADAN TRAVEL IN THE MIDDLE EAST

This year, Ramadan began on Thursday, June 18 and ended Friday, July 16 and was followed in quick succession by the holiday of Eid al-Fitr (July 17-19), also known as “the Sugar Feast.” Both holidays are celebrated by Muslims around the world, but especially in the Middle East where 91.2% of the population considers themselves to be of the Muslim faith.

In the Middle East, the average regional week-on-week travel intent peaked at 180% (compare that with 117% for Southeast Asia). The main holiday travel happened over three days between July 15-17, with the 16th as the heaviest travel day, followed by a prolonged increase in travel volumes originating in the region until July 20.

### Week-on-Week Changes in Outbound Travel Intent

ORIGIN REGION: MIDDLE EAST



### GREECE SEES A SHORT-TERM DIP IN TRAVELER INTEREST

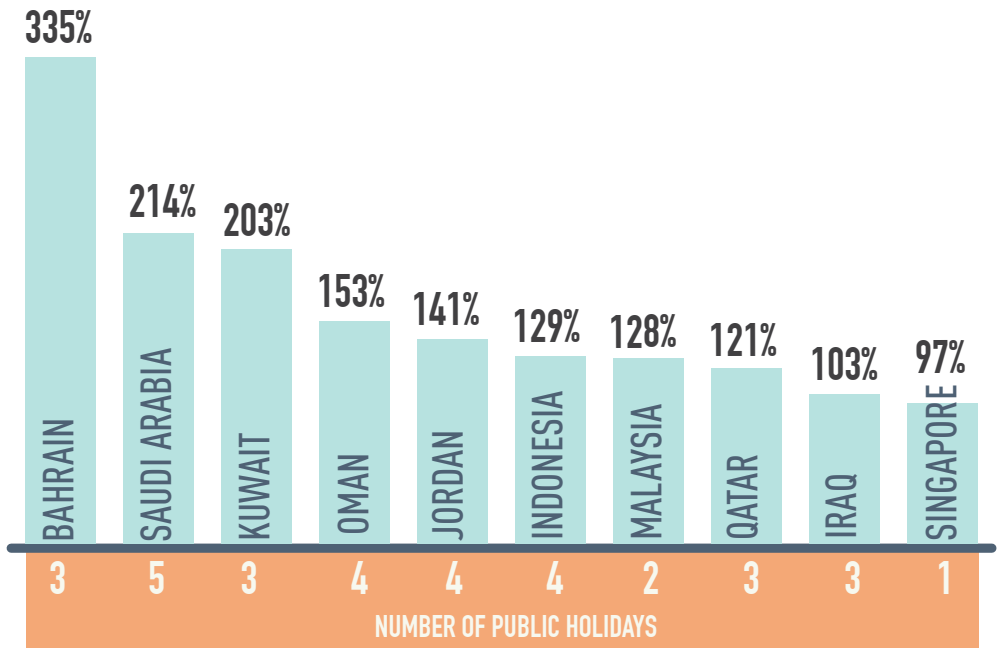
Following the July 5 announcement of the referendum on the bailout deal, travel intent numbers to Greece dropped by around 23%, compared with countries in the rest of the Mediterranean Arc, all of which saw a seasonal increase in searches over the same period. In particular, Turkey and Croatia saw the most positive growth at the end of June and beginning of July. However, as of July 9, travel intent numbers had started to climb back up again. It remains to be seen whether the intent ultimately converts into actual bookings.

Global traveler interest in Greece has been relatively stable over the past few quarters, in spite of the country's financial difficulties. Over the past two quarters, we've seen Greece stay in the top 10 most searched destinations globally and for European travelers, although it dropped in the latter from position four to position eight over the last quarter.



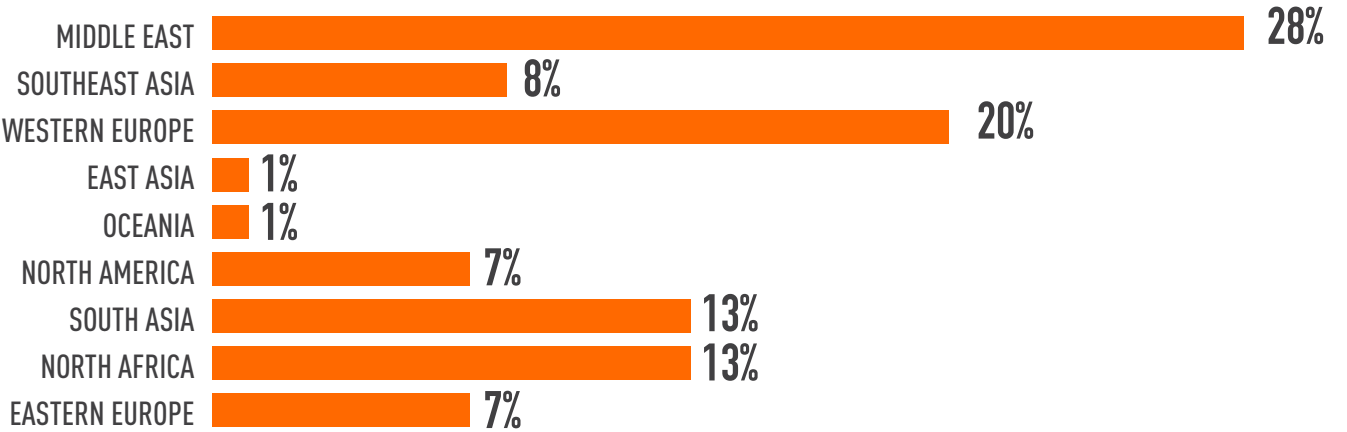
The global top 10 countries with the highest week-on-week growth around the holiday were dominated by Middle Eastern countries Bahrain, Saudi Arabia, and Kuwait, which lead the way with 2 to 3.3 times higher travel intent during the holidays than for the week before, likely prompted by the three to five observed public holidays in most countries in the region.

*Week-on-Week change in travel Intent and number of Public Holidays*



Intra-regional flights are the most frequent at 28% of total outbound travel, followed by flights with destinations in Western Europe (20%) and North Africa and South Asia (both 13%). Southeast Asia is the top gaining (week-on-week) destination with a 25% increase from Middle Eastern travelers.

*Breakdown of Destination Regions with Origination in the Middle East with Departures 15-17 July*



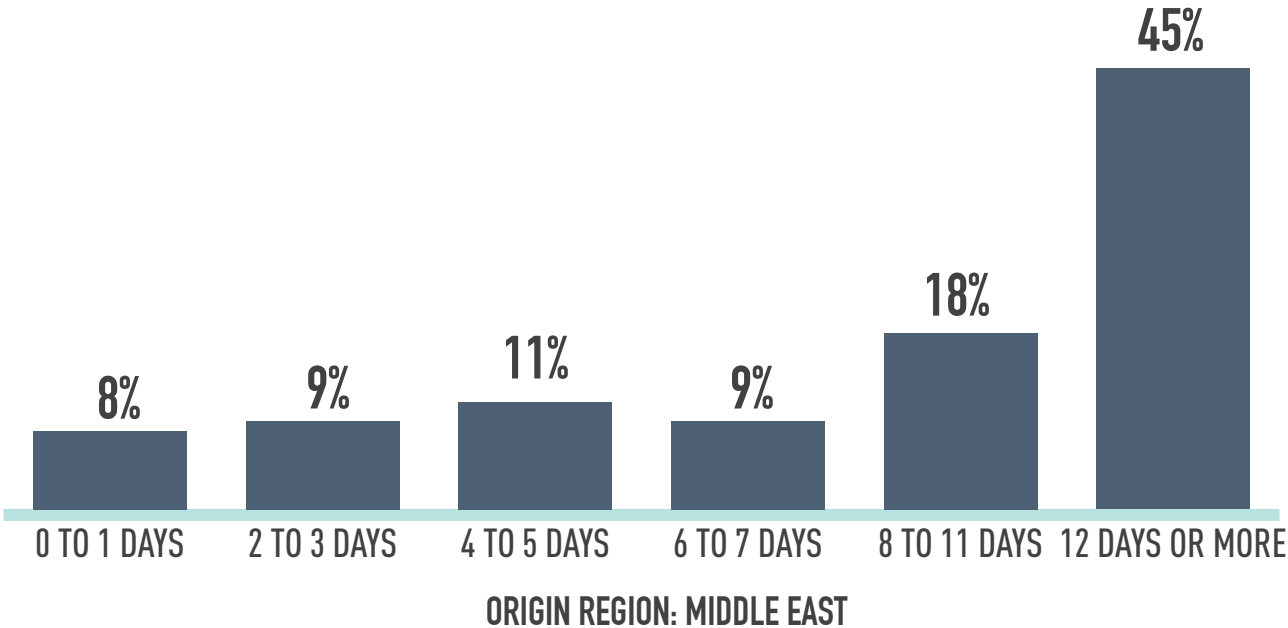
The top destination countries show a lot of diversity. Turkey, straddling Europe and Asia, holds pole position, followed by Egypt and India, with the US and Germany all in top five.

*Top 10 Destination Countries for Departures 15-17 of July*



Post-Ramadan, a whopping 63% of travelers from the Middle East looked to travel for more than eight days and almost 45% for 12 days or more, at least partially reflecting the number of public holidays observed in the region.

*Trip Durations for Departures 15-17 of July*



## Europe, Middle East and Africa Outbound and Last-Minute Travel Trends

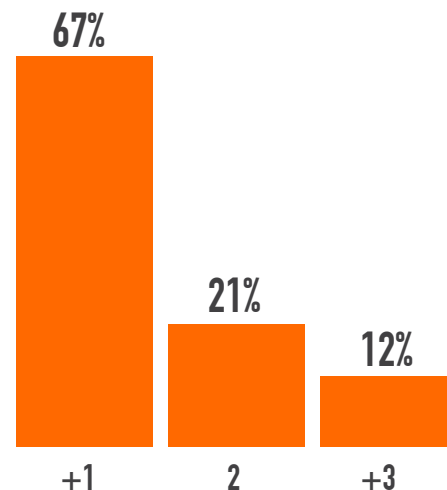
## OUTBOUND TRENDS DURING Q2 2015

## EUROPE

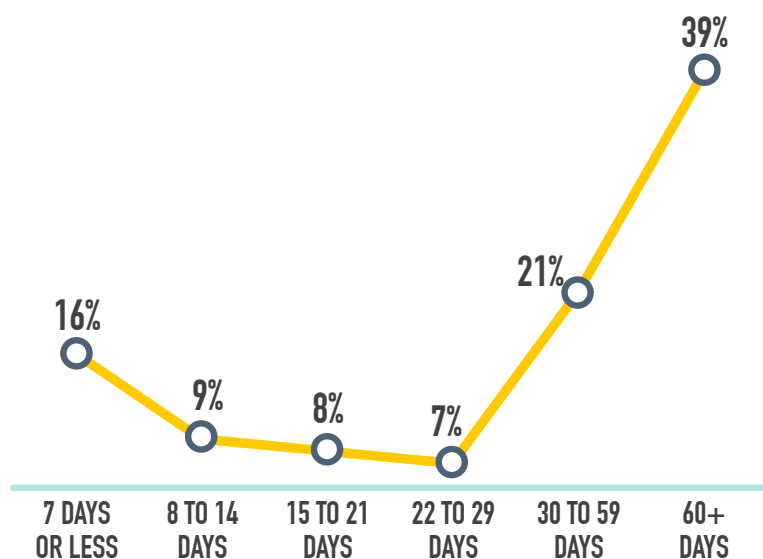
## Most Searched Destinations (Outbound)



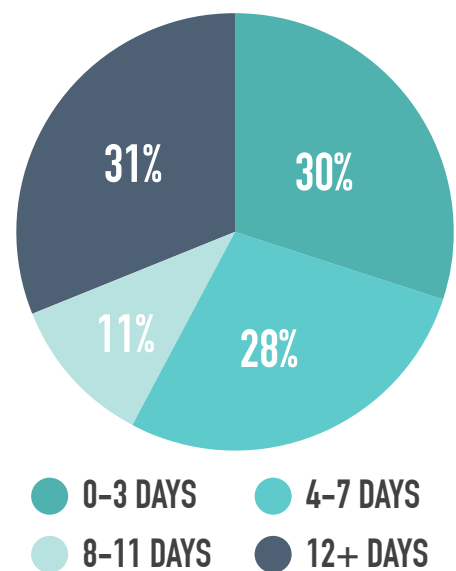
## Party Size Searched



## Search Lead Time



## Duration Searched



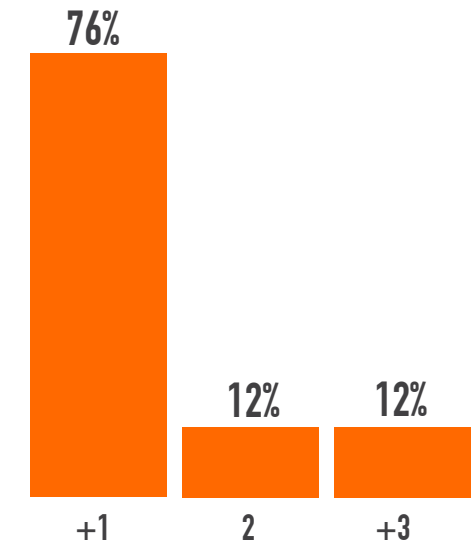


## MIDDLE EAST AND AFRICA

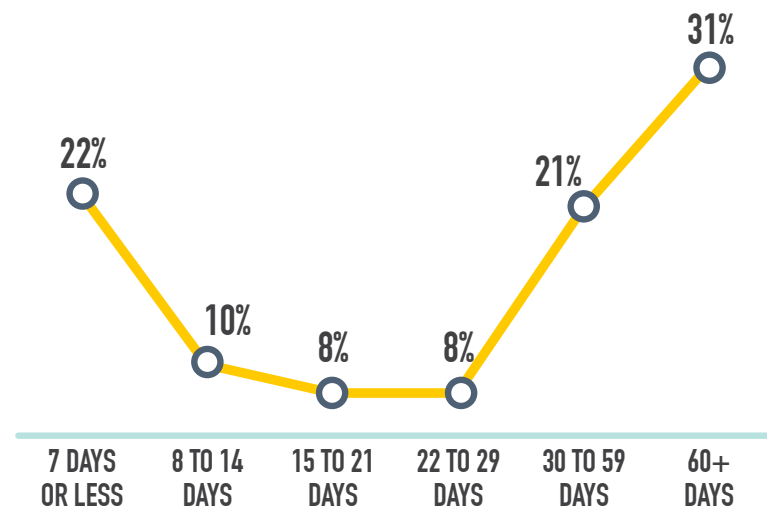
### Most Searched Destinations (Outbound)



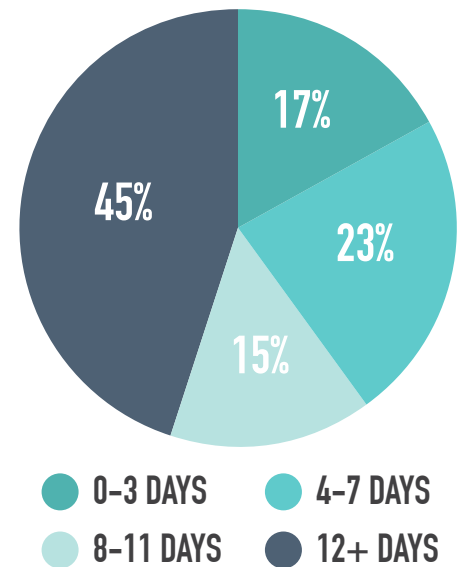
### Party Size Searched



### Search Lead Time



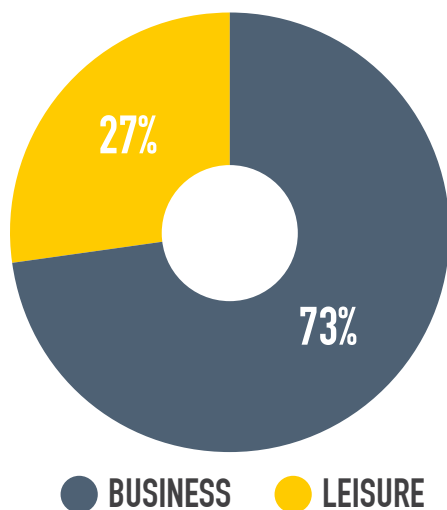
### Duration Searched



## LAST-MINUTE TRAVEL: BUSINESS VS. LEISURE BOOKING AND LEISURE TRAVEL TRENDS

## EUROPE

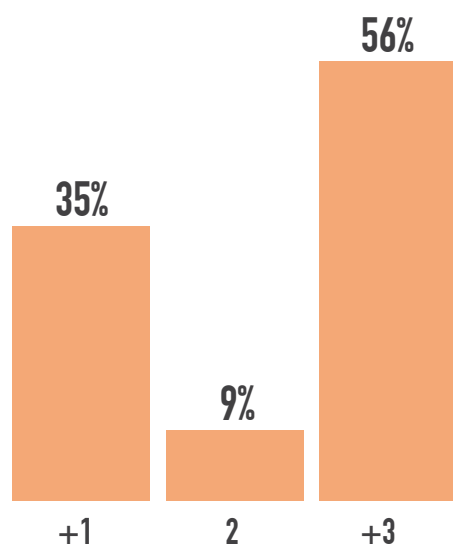
## Business vs. Leisure



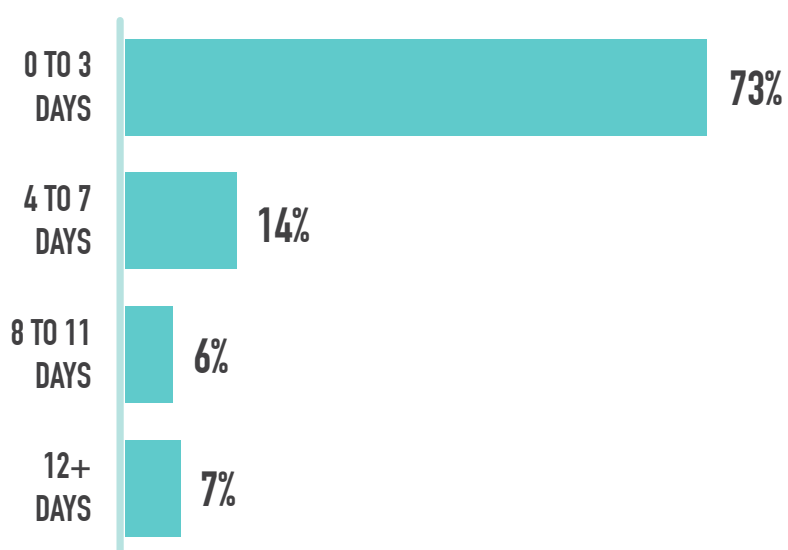
## Top 5 Destinations in Q2 2015



## Party Sizes

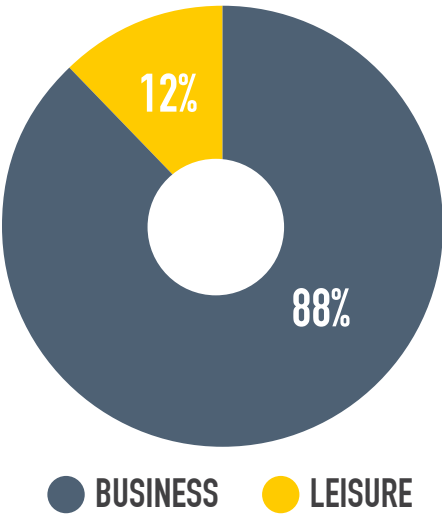


## Trip Duration



MIDDLE EAST AND AFRICA

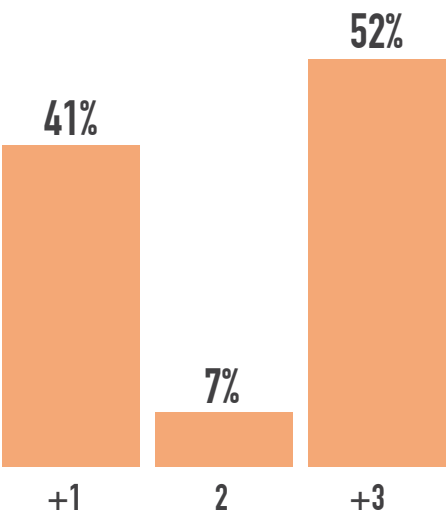
Business vs. Leisure



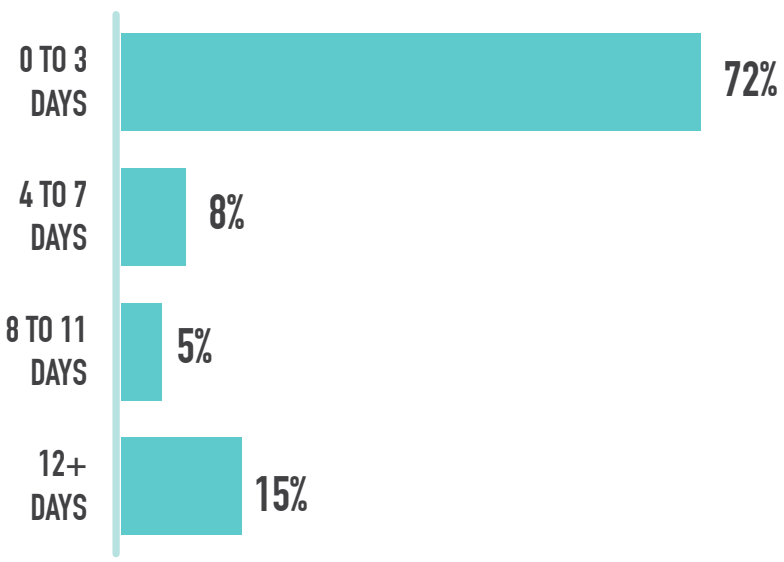
Top 5 Destinations in Q2 2015



Party Sizes



Trip Duration



ASIA PACIFIC Q1 2015 TRAVEL INSIGHTS

Seasonal Travel Events

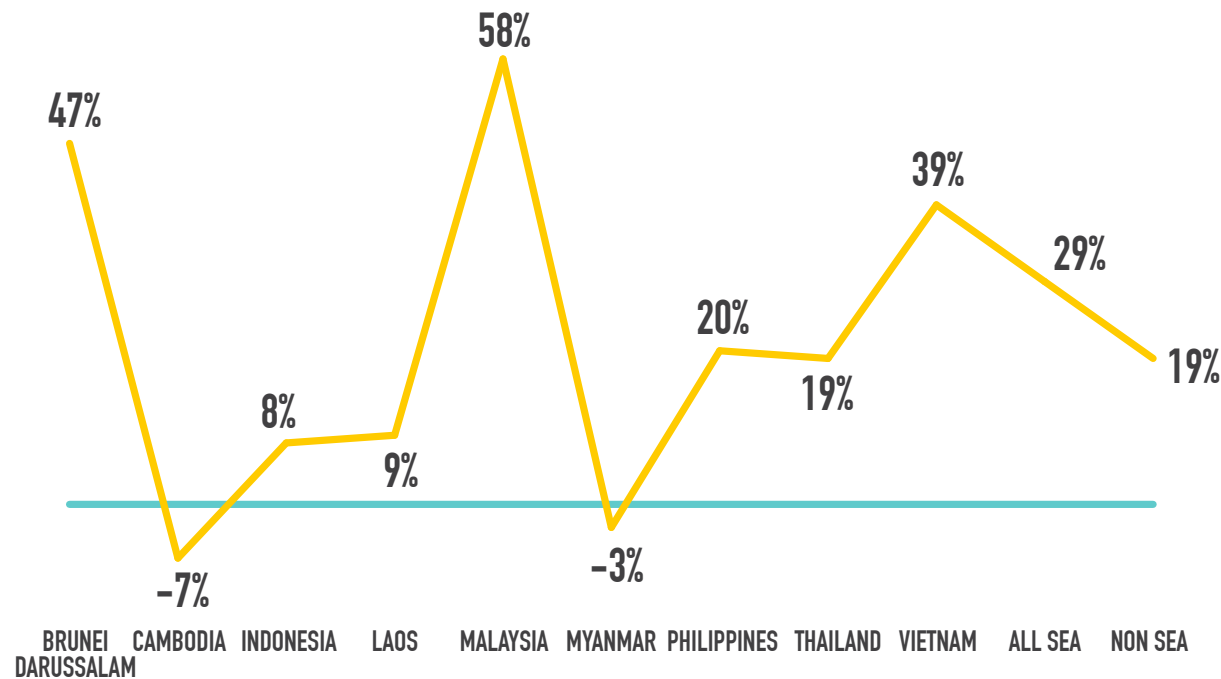
28TH SOUTHEAST ASIAN GAMES

Between hosting the Southeast Asian (SEA) Games and celebrating 50 years of nationhood this coming August, summer 2015 is shaping up to be a big season for Singapore. The 28th biennial SEA Games took place in Singapore from June 5 to June 16, after a two decade hiatus from the busy port city.

A total of 11 countries participated this year, including Cambodia, Laos, Malaysia, Burma, Singapore, Thailand, Vietnam, Brunei, Philippines, Indonesia, and Timor Leste (the last of which we've not included in the travel intent data below due to low travel volume).

Sojern found that travel intent to Singapore during the SEA games was higher than before the event. Across most countries participating, travel intent to Singapore was on average 29% higher during the event versus before the event. Only Cambodia and Myanmar bucked the trend, possibly due to tighter visa requirements, infrequency of flights, and a lack of strong, established business ties to Singapore. Travel intent to Singapore from non-SEA participating countries was 19% higher during the event versus prior, as well.

Indexed Search Volumes: Comparing Travel Intent Data Before and During the Games



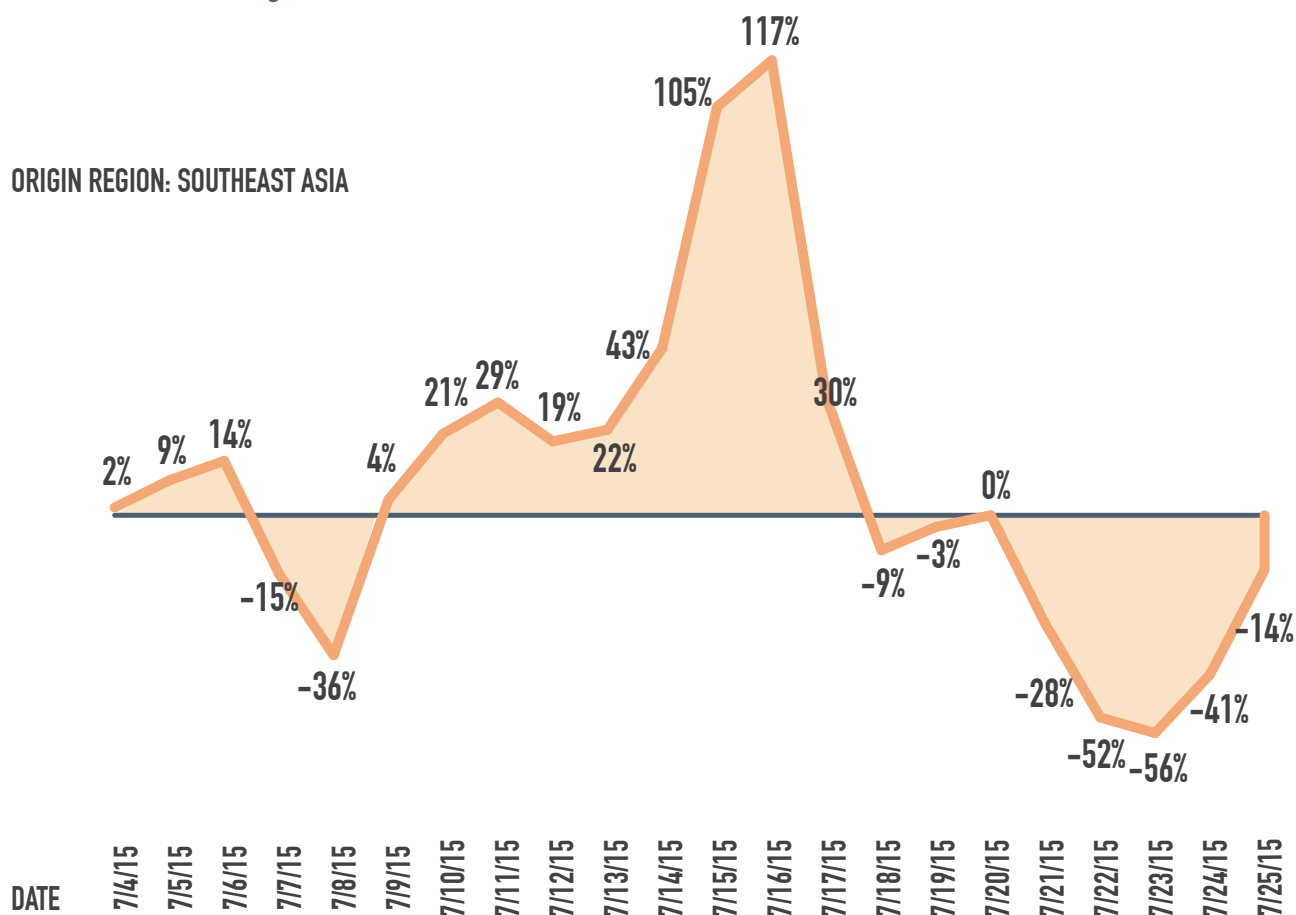
Before and during the nearly two-week-long event, we saw a variety of peak travel days. For most countries, travel peaked before opening ceremony on June 5, the only exceptions being Laos, which peaked on June 10, and the Philippines, on June 11. The latter peak likely coincided with the Philippines participation in the swimming finals.

### POST-RAMADAN TRAVEL TRENDS IN SOUTHEAST ASIA

Beyond the Middle East, Ramadan is also widely observed in Asia-Pacific, 25% of whose denizens consider themselves to be Muslim, especially in Southeast Asia, location of the country with the largest Muslim population on the globe, Indonesia.

As mentioned in the equivalent section for the Middle East, the average regional week-on-week travel intent peaks at 117% for Southeast Asia versus 180% in the Middle East. In both origin regions, the main holiday travel happens over three days: July 15-17, with the 16th as the heaviest travel day. While a prolonged increase in higher travel volumes can be observed in the Middle East until July 20, in Southeast Asia travel activity normalizes after July 17.

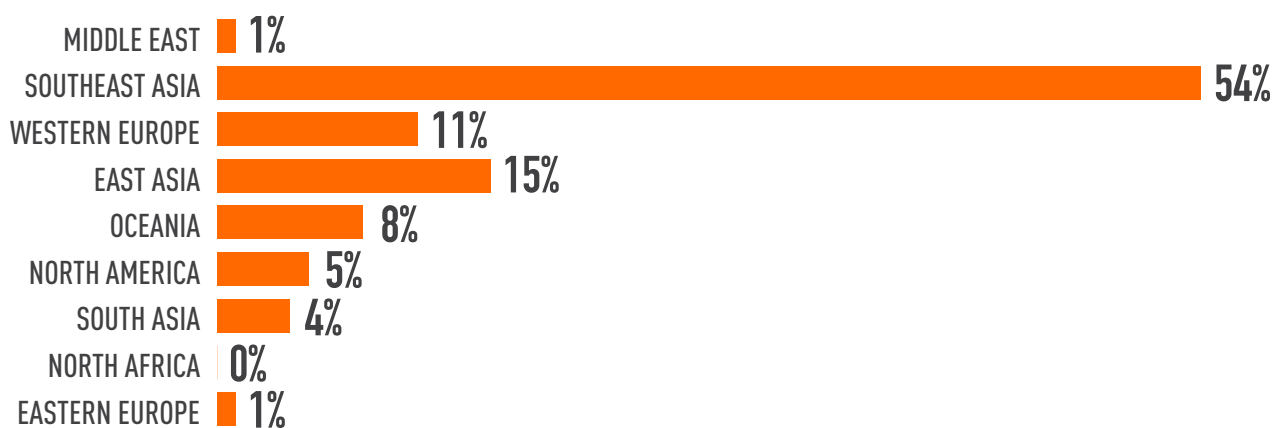
#### Week-on-Week Changes in Outbound Travel Intent



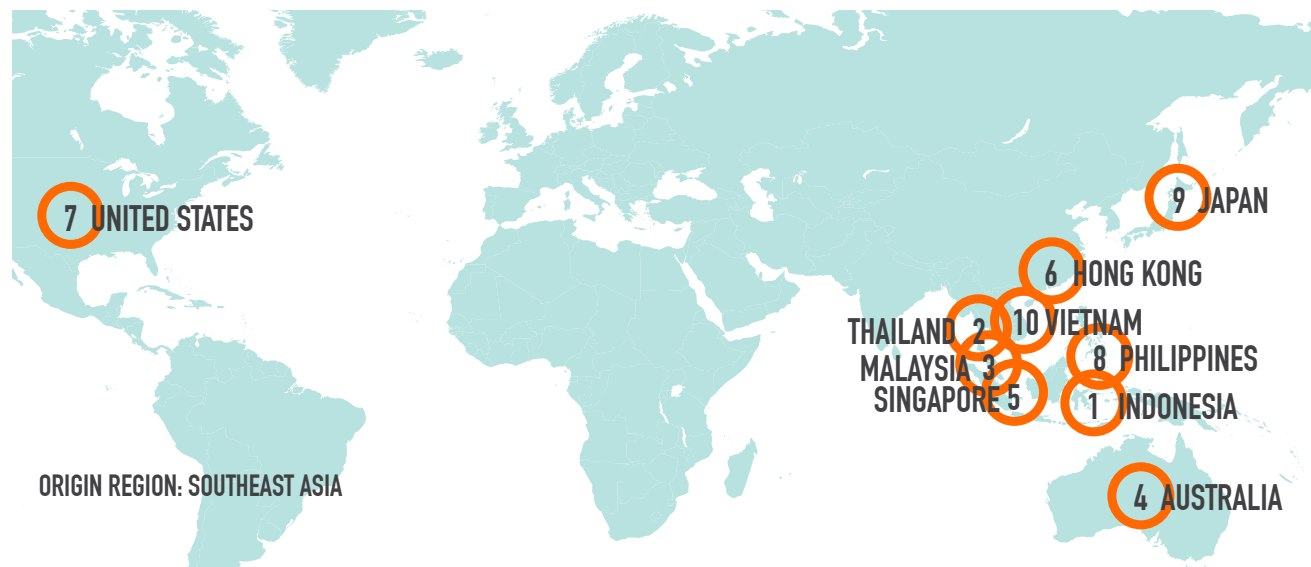
In Southeast Asia, the countries with the highest week-on-week growth in travel intent were Indonesia at 129% increase, Malaysia with 128%, and Singapore with 97%. For the global top 10, see Post-Ramadan Travel in the Middle East section.

Southeast Asian travelers mostly traveled within the region, with 54% of travels within the confines of Southeast Asia, 20% more than the week before, and 15% within broader East Asia. Interestingly, Southeast Asia is the top gaining (week-on-week) destination for both origin regions, with a 21% increase for Southeast Asian travelers and a 25% increase for Middle Eastern travelers.

#### *Breakdown of Destination Regions with Origination in Southeast Asia with Departures 15-17 July*

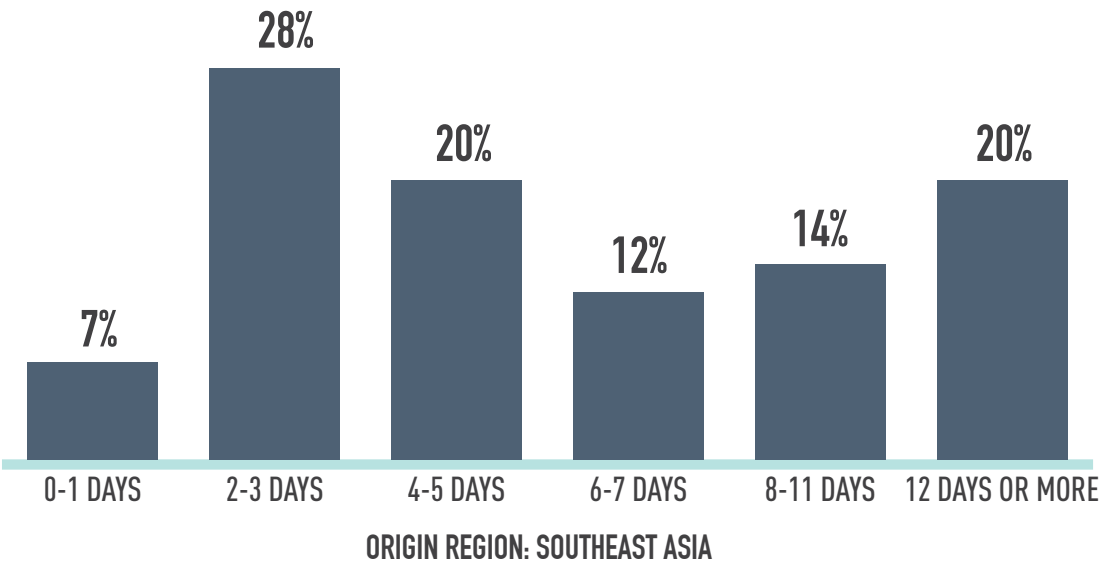


#### *Top 10 Destination Countries for Departures 15-17 of July*



Trip durations are overall shorter for Southeast Asian travelers, with most (47%) preferring a trip of under five days.

*Trip Durations for Departures 15-17 of July*



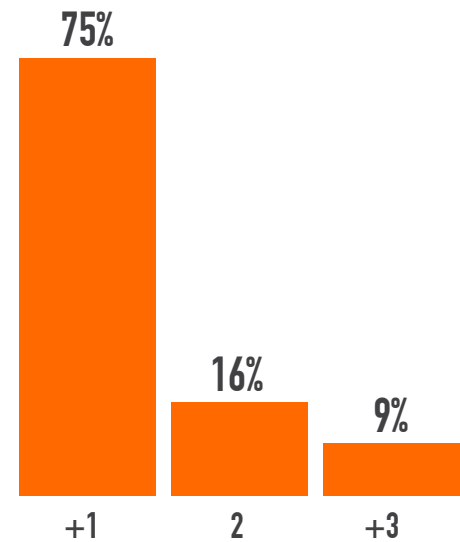
## Asia-Pacific Outbound and Last-Minute Travel Trends

## OUTBOUND TRENDS DURING Q2 2015

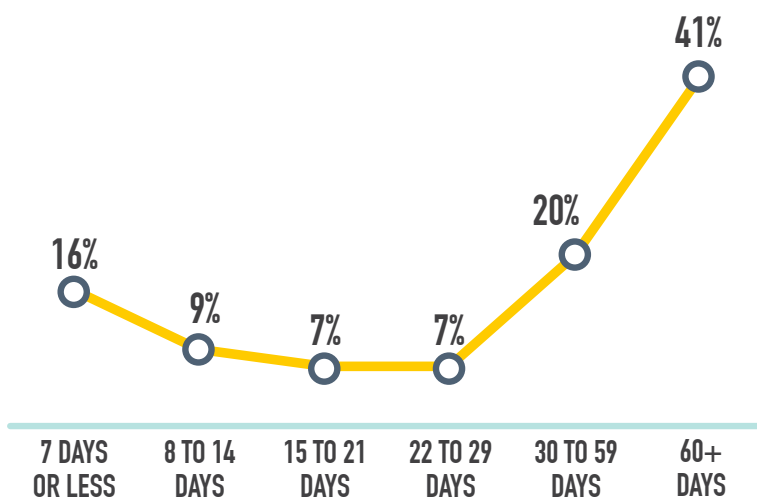
## Most Searched Destinations (Outbound)



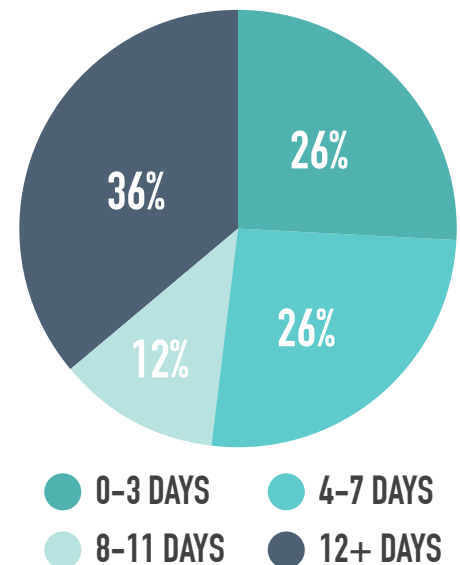
## Party Size Searched



## Search Lead Time



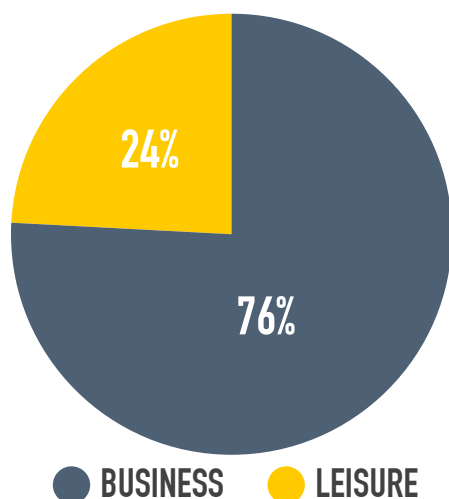
## Duration Searched





## LAST-MINUTE TRAVEL: BUSINESS VS. LEISURE BOOKING AND LEISURE TRAVEL TRENDS

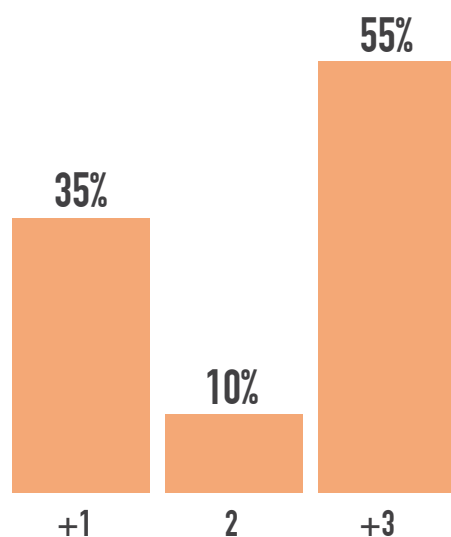
*Business vs. Leisure*



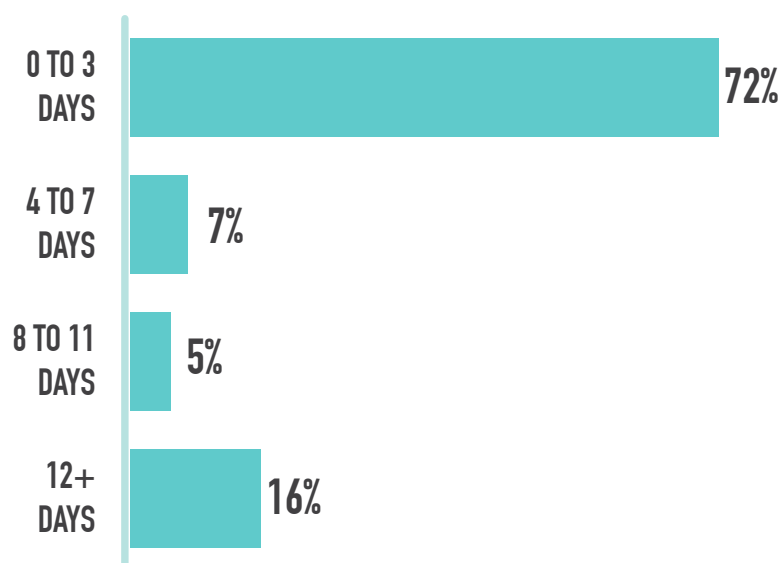
*Top 5 Destinations in Q2 2015*



*Party Sizes*



*Trip Duration*







## SECTION II

# Travel Trends Forecast: Global Travel Trends for Fall 2015



With access to over a billion traveler intent profiles, Sojern's quarterly travel reports are designed to shed light on recent shifts in travel patterns and to offer actionable insight on stated and predicted behavior of future travelers. Brands find our "Travel Trends Forecast" section to be a valuable tool for developing context-aware marketing strategies.

In this quarter's Travel Trends Forecast, we took a peek at the likely impact of two major events in Singapore: Singapore's 50th anniversary on August 9 and the Formula 1 Grand Prix. The forecast also looks at travel trends around Labor Day in the US.

## AUGUST: TRAVEL TRENDS FOR SINGAPORE'S 50TH ANNIVERSARY

August 9, 2015 marks Singapore's 50th anniversary as an independent republic. The anniversary will be celebrated over a long, travel-friendly weekend beginning Friday, August 7 and running through Monday, August 10.

Looking at the travel data we've collected through July 6, 2015, we see that the most desired departure date is the Friday before the anniversary date of the 9th. But the Thursday before the long weekend sees the highest growth, increasing 3.6 times week-on-week as we get closer to the holiday.

Overall, inbound travel to Singapore is rather flat around the weekend itself. We do however see a spike in travel the weekend before the anniversary on Saturday, August 1, which sees 70% more inbound travel than the same day a week prior.

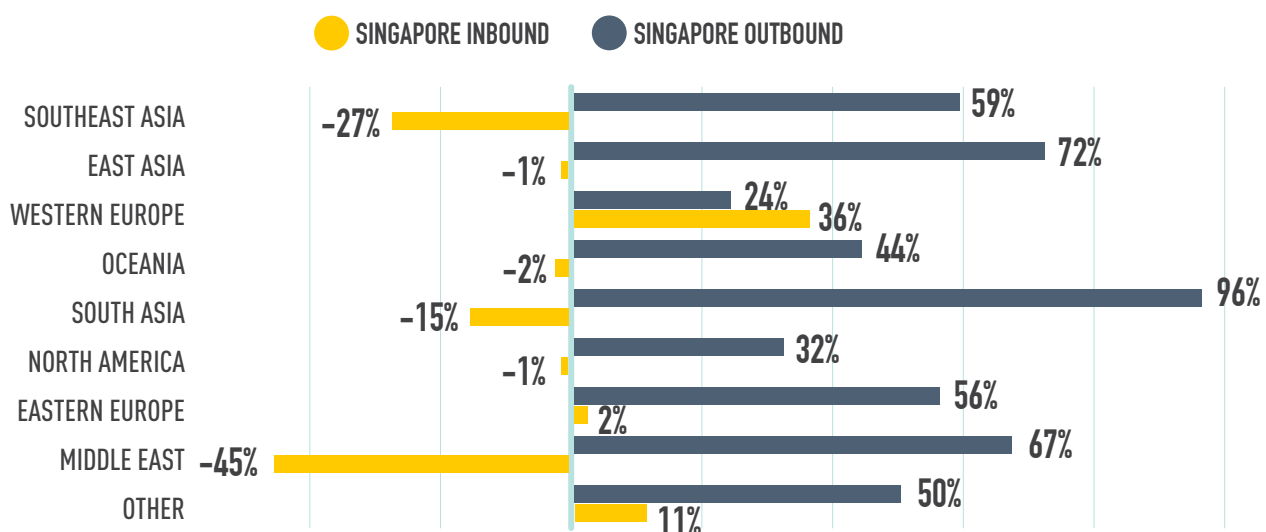
## OUTBOUND AND INBOUND TRAVEL AROUND SINGAPORE'S 50TH

When comparing the 10 days leading up to Singapore's 50th anniversary, during which visitors would likely arrive, with a similar time span in July, we see that Singapore-bound travel intent is high across all major regions.

Travelers flying into Singapore during the days leading up to the anniversary weekend come predominantly from Europe, the US, and East Asia. Few visitors during this time are from Muslim countries, especially the Middle East (down by 45%) and Southeast Asia (down by 27%) due to Post-Ramadan holiday travel which uplifts in celebrating regions around July 17.

Singaporeans looking for some time away from it all travel in great waves to Thailand, Indonesia, and other Asia-Pacific countries followed thereafter by the US in 10th place.

### Travel Trends by Region: Singapore In- and Out-Bound



## TRIP DURATIONS

Travelers landing in Singapore in the days leading up to the anniversary intend to stay for longer than eight days, a shift driven by adventure seekers from both Western Europe and North America.

Of Singaporeans who use this time to travel elsewhere, we see two trends: those who use the long weekend for a quick getaway, and those that add a few days onto their trips for an extended stay abroad.

The weekend getaway group that planned 4-5 days abroad is the biggest at 27%, a whopping 69% week-on-week increase.

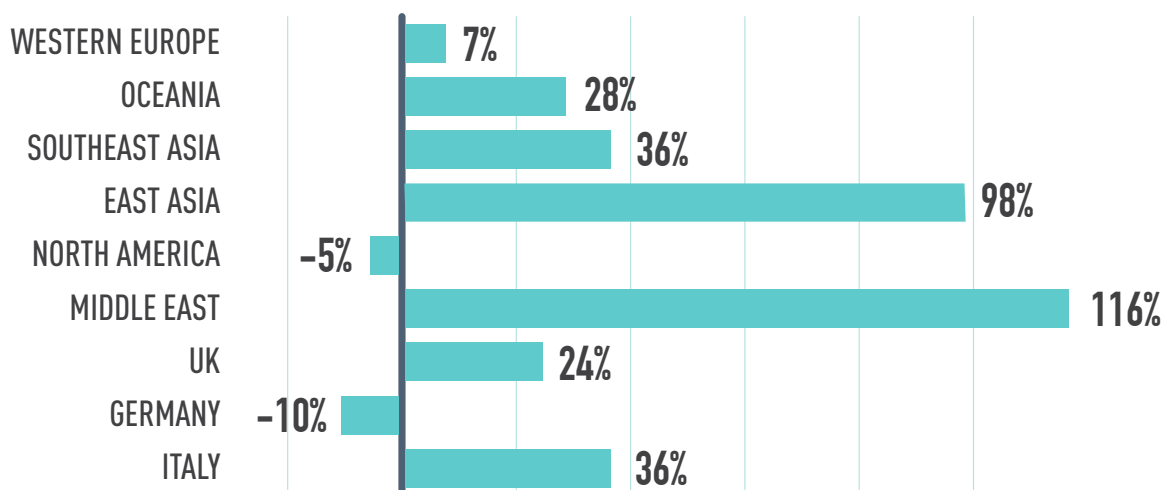
The extended holiday group staying 8-11 days is placed third, up 27% week-on-week as compared to the reference time period in July.

## SEPTEMBER: SINGAPORE'S 2015 GRAND PRIX TRAVEL PREDICTIONS

Formula 1 fans will flock to Singapore for the city-state's 2015 Grand Prix, which takes place Friday, September 18 through Sunday, September 20 (race day). Across origin regions, we see an increase in inbound travel to Singapore during the week leading up to race day September 20.

Comparing the week of the Grand Prix with the week prior, travelers from East Asia, the Middle East, and Oceania show the greatest increase in travel demand. East Asia shows the biggest increase in intent as compared to last year while Western Europe, North America, and Oceania show similar week-on-week patterns as compared to last year's findings.

### Year-on-Year Change



### Volume of Grand Prix Travelers

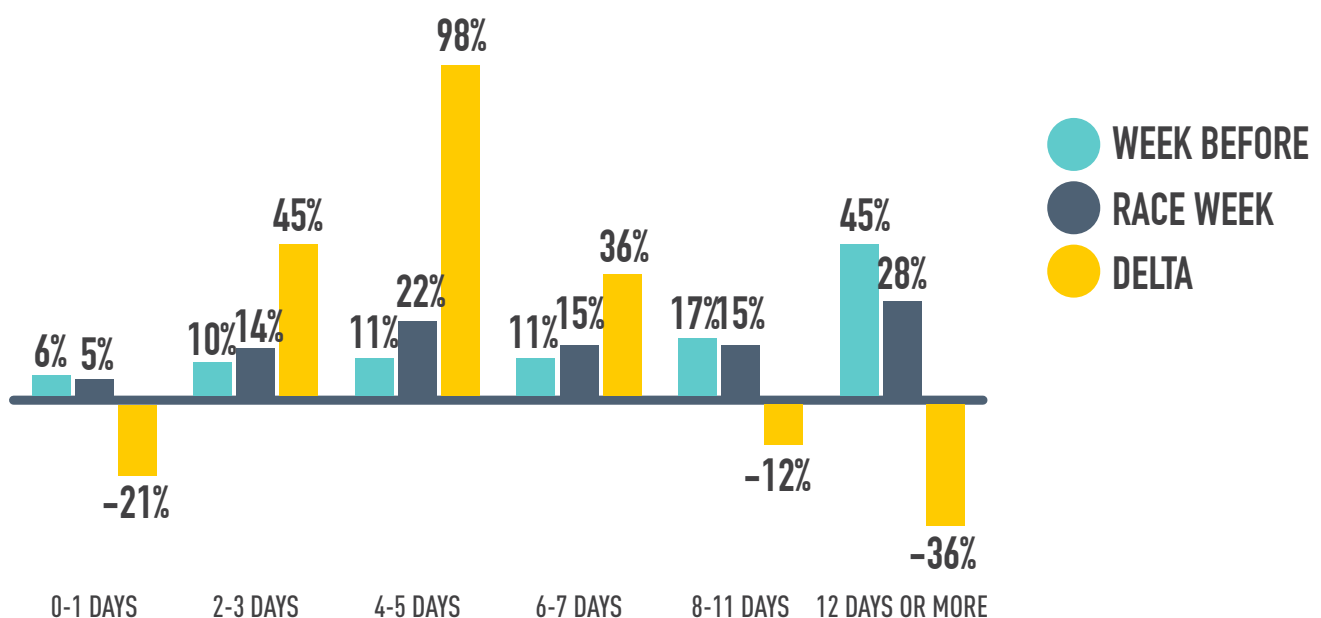
Based on travel intent data for three months prior to the races, we estimate a 28% higher travel volume for 2015 as compared to the event in 2014.

While travel intent is dropping for Germany and North America, it's increasing for origin countries UK, Australia, and Italy. Increases in travelers from East Asia are driven primarily by Japan and are likely unrelated to Formula 1 as the country has a public holiday falling on the Monday and Tuesday after race weekend (not the case last year).

### Trip Duration

During the week leading up to the Grand Prix, the distribution of trip length changes too. Trips lasting anywhere from 2-7 days gain share at the expense of trips lasting one day and eight or more days. Based on what we've seen, the most likely Singapore arrival date is the Thursday before the race, but fans are also arriving in higher numbers on Friday and Saturday compared to the week before.

#### *Trip Durations for Travel the Week Prior to the Singapore Grand Prix*

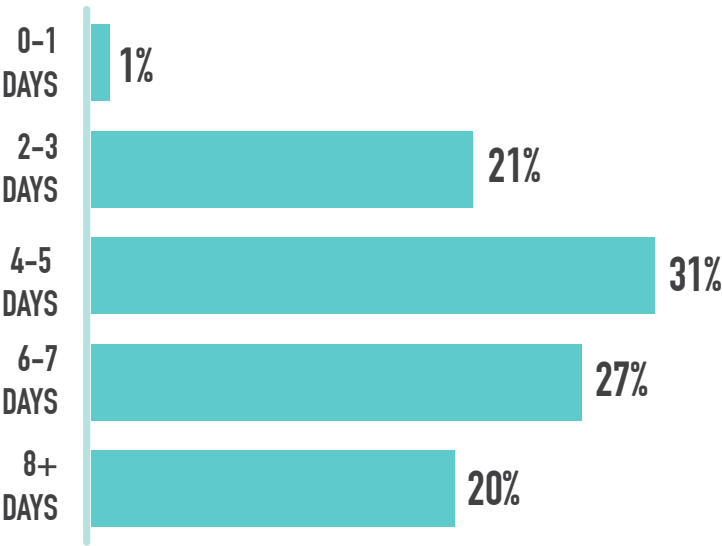


LABOR DAY TRAVEL TRENDS IN THE US

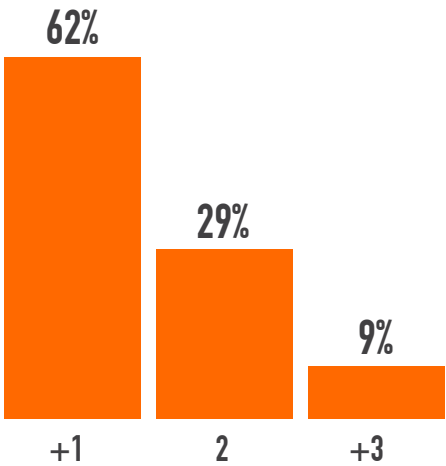
Americans are already thinking about the next national holiday and the extended weekend that comes with it. Based on the data we pulled for US travelers booking trips around Labor Day 2015, which lands late this year on Monday, September 7, the top current destinations are Las Vegas, Miami, Cancún, New York City, and Orlando.

In terms of trip durations, 4-5 day stays (31%) and 6-7 day stays (27%) are the most desired. Duo travel caps out at 29% and solo travel reigns highest at 62% for the last long holiday weekend of the summer in the US.

Trip Duration



Party Sizes



## GLOSSARY

Sojern analyzed airline search and travel behavior from April through June 2015 to better understand changing global consumer travel trends. This report reviews Sojern's findings across the globe.

Sojern's analysis highlights a number of consumer travel trends, including:

**Top Searched Destinations:**

The destinations potential travelers are searching

**Top Traveled Destinations:**

The destinations to which travelers are booking

**Origination Cities:**

The cities people are traveling from

**Search Volume:**

Total number of searches made by travelers

**Booking Volume:**

Total number of bookings made by travelers

**Metro Areas:**

The urban regions served by designated airport(s), as defined by the respective country's government bureaus

**Trip Type:**

The reason why people are traveling (business or leisure). Sojern uses an algorithm that analyzes different variables to determine whether a trip is for business or leisure.

**Trip Duration:**

The length of a searched or booked trip

**Search Lead Time:**

The length of time between a search and departure date

**Booking Lead Time:**

The length of time between a booking and departure date

**Party Size:**

The number of people traveling on the same reservation

**Traveler Intent:**

The intent to travel as defined by search data

**Last-Minute Booker:**

A traveler that books a trip with seven days or less to travel

**Short-Haul Trip:**

A short-distance trip, usually regional

**Long-Haul Trip:**

A long-distance trip, usually inter-regional

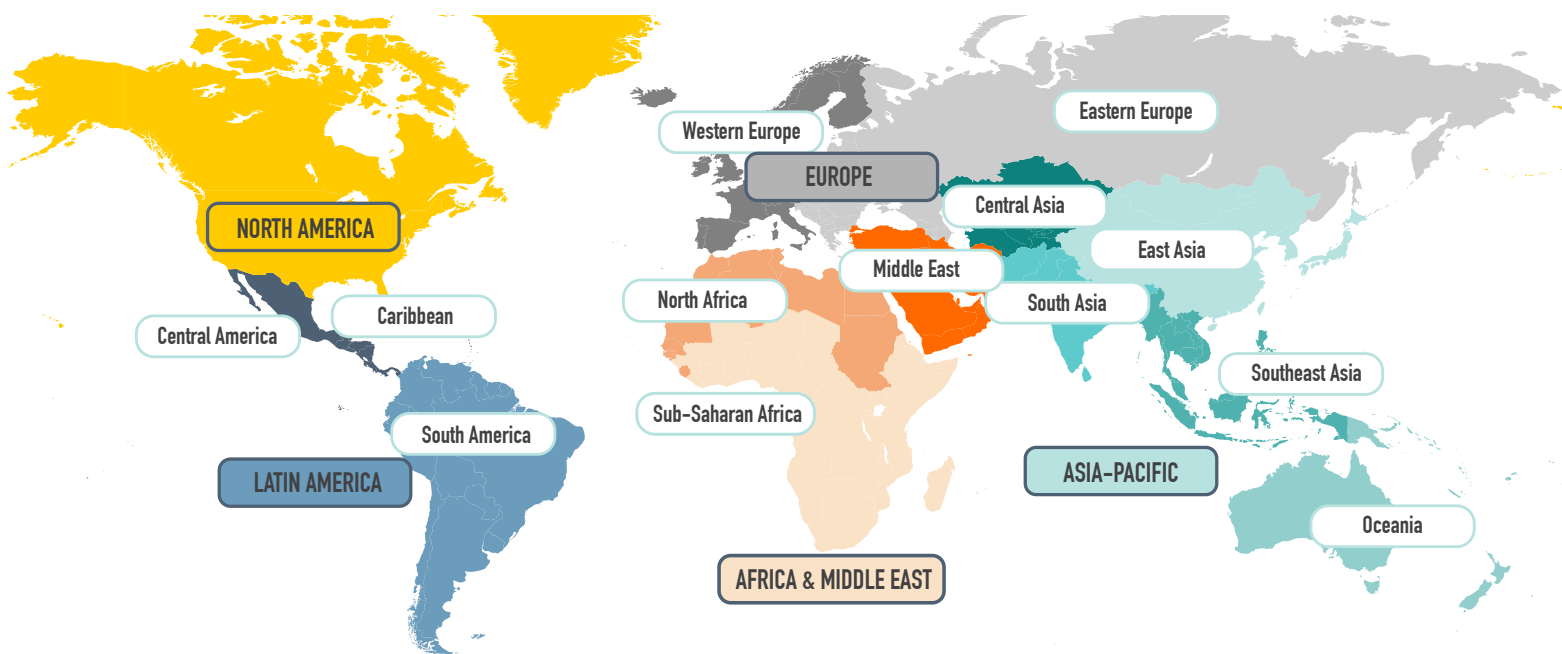
**Event to Travel:**

Lead time (see search lead time or booking lead time, above)



## REGIONAL COVERAGE

Sojern breaks down the world into regions and subregions as shown in the map below. Regions are shown with a colored background and subregions with a white background.



## METHODOLOGY

Sojern's quarterly insights reports are based on the rigorous analysis of more than a billion traveler intent data points, obtained through Sojern's unique partnerships with some of the world's most renowned travel brands. The insights available through this analysis enable brands to deliver the right messages to the right traveler at the right time through display, video, mobile, social, and boarding pass advertising. Our analysis is based on airport level data which are then aggregated to countries and regions. All of the insights are based on very specific data sets as provided by Sojern's data partners.

Sojern never shares or passes out personally identifiable information (PII) such as names, emails, or addresses. The data provided is not a complete view of all global traveler information as different data sources provide additional views of traveler behavior.

For more information, please visit [sojern.com](https://sojern.com).



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