



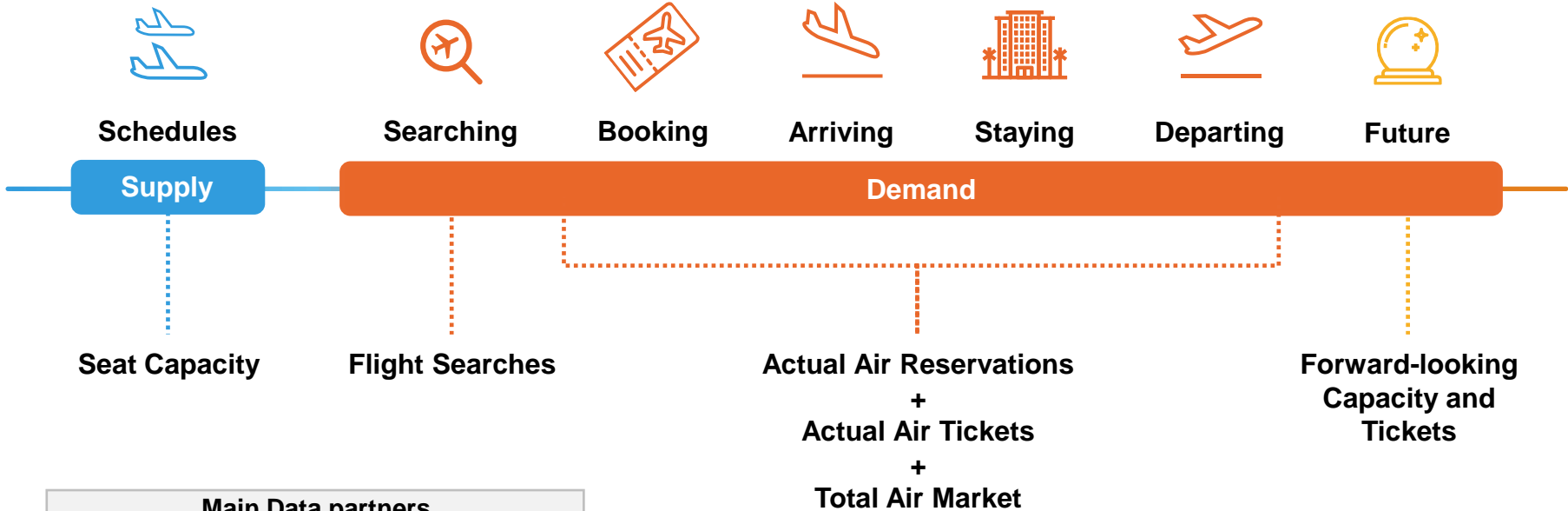
ForwardKeys
PREDICTING TRAVELLERS' IMPACT

TFWA China Watch webinar

Nan Dai, Insights Expert

March 2022

ForwardKeys data captures and reflects the entire traveller journey



Main Data partners

* Historic data





1. China domestic travel trend



2. Chinese airports: Tier 1 vs Tier 2

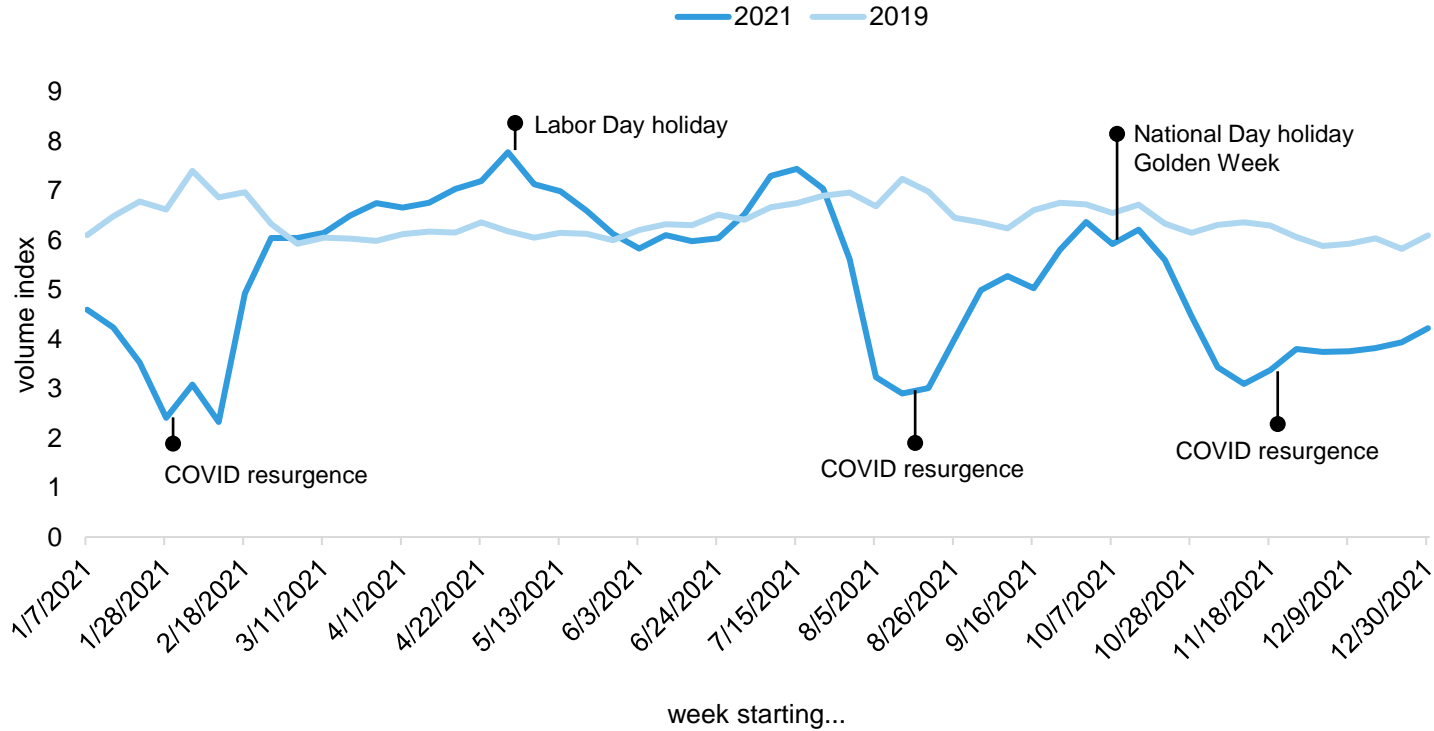


3. Focus: Hainan and Macau

China domestic travel trend

Domestic air travel trend

2021 vs 2019



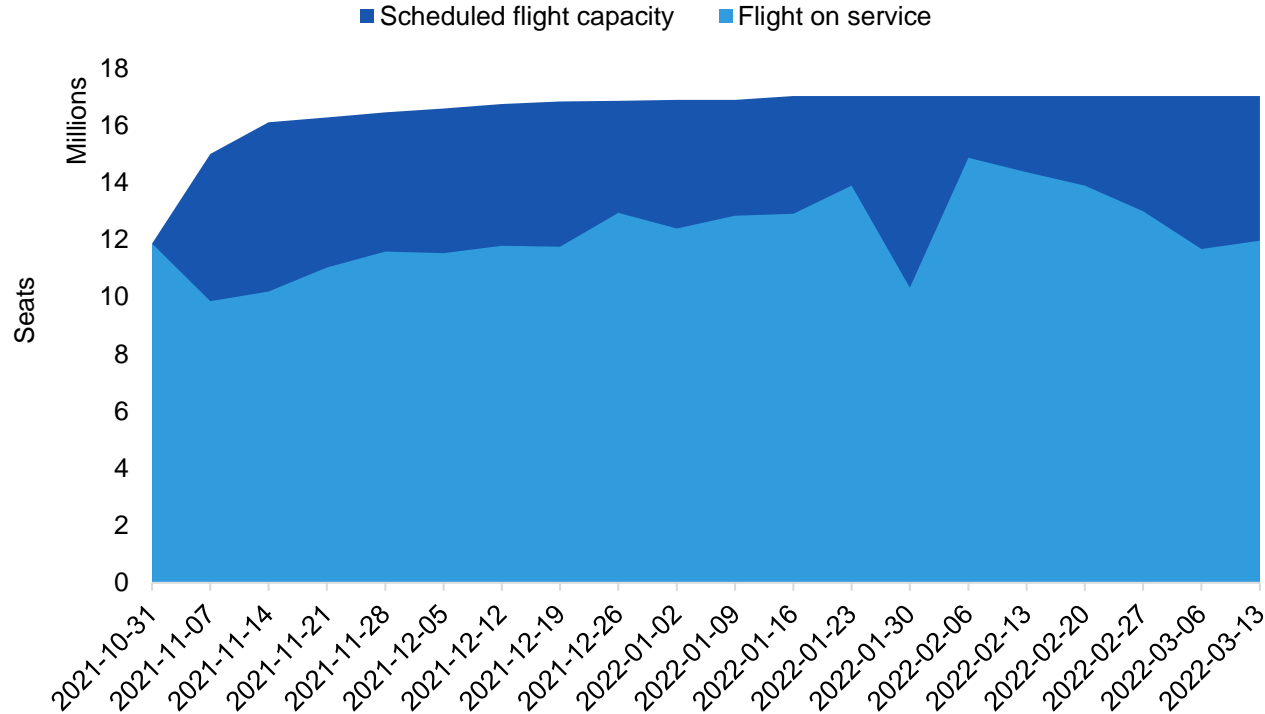
Source: ForwardKeys Air Ticket Data.



Check out the latest analysis at www.forwardkeys.com | #ForwardKeys

More than a quarter of domestic seats are cancelled during this Winter season

Seat capacity for domestic travel between 31 October 2021 – 19 March 2022, as of 31 Oct 2021 and 14 March 2022



Cancellation rate

26%

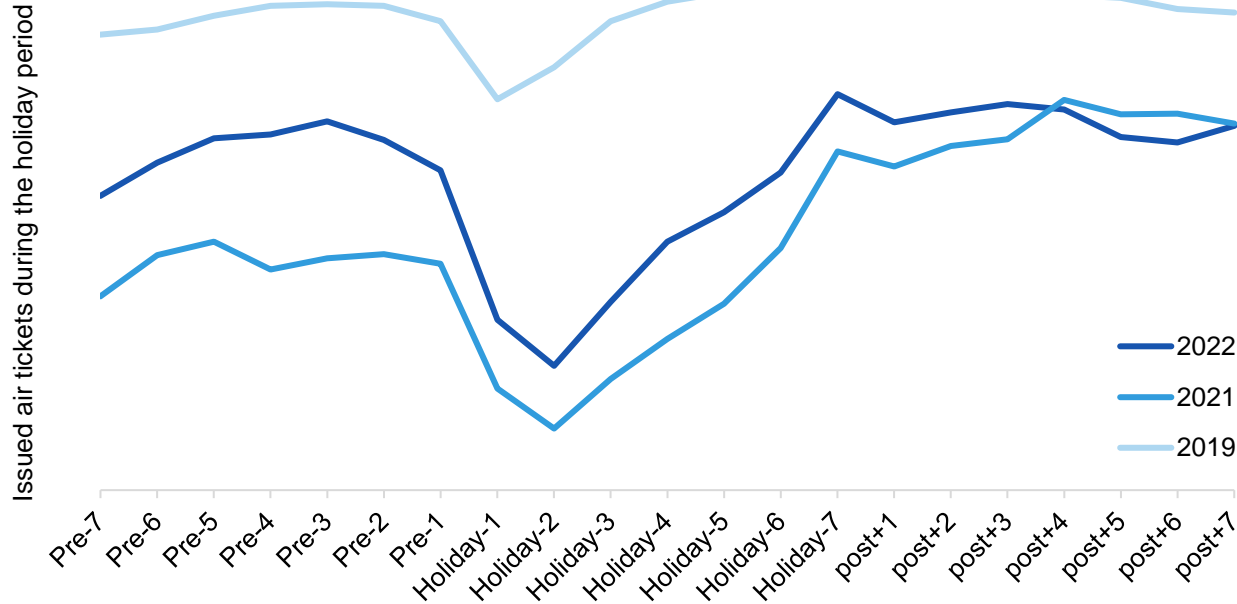
Source: ForwardKeys Seat Capacity Data.



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Domestic air travel during Chinese New Year

Chinese New year period 2022 vs 2021 vs 2020



+25.5%
CNY 2022 vs. 2021

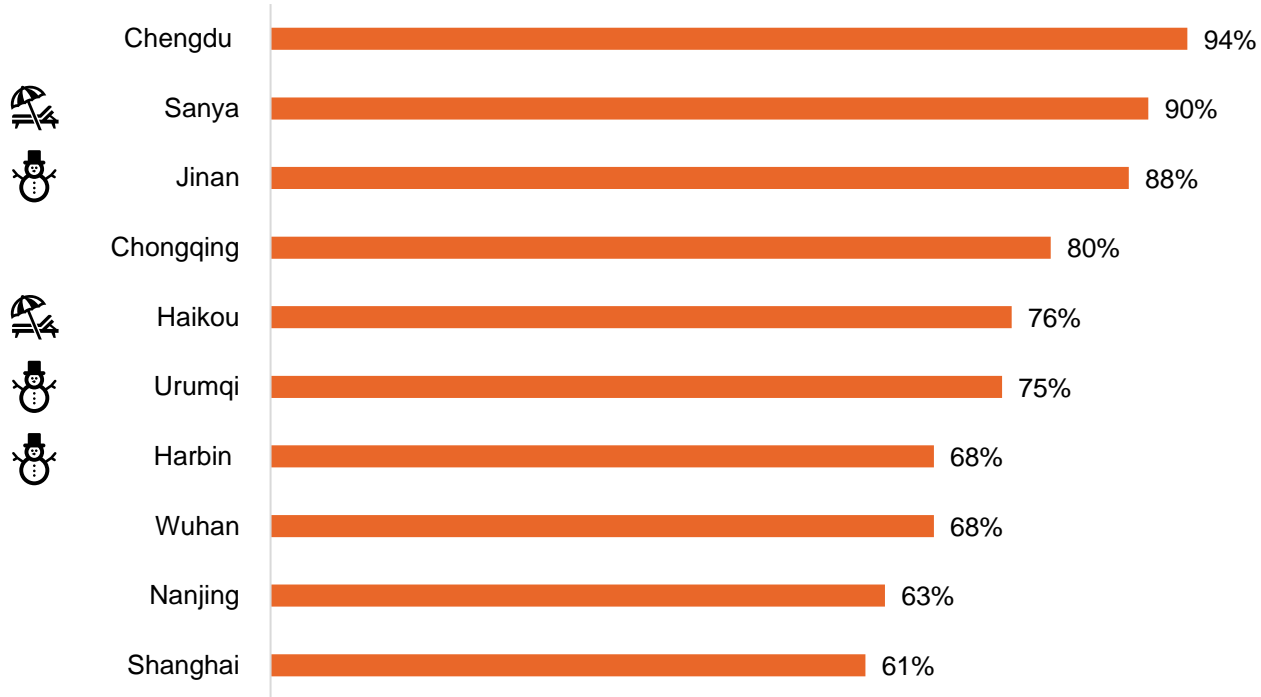
-34.2%
CNY 2022 vs. 2019

*Travel period
CNY 2022: 24 Jan-13 Feb
CNY 2021: 4 Feb - 24 Feb
CNY 2019: 28 Jan-17 Feb

Source: ForwardKeys Air Ticket Data.

Leisure destinations are most resilient

Chinese New year travel period 2022 vs 2019, % of 2019's level



Source: ForwardKeys Air Ticket Data.



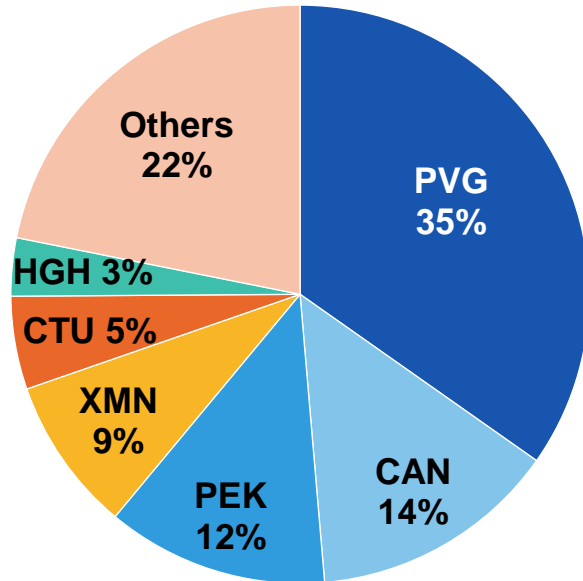
Arrivals

17:50	Dublin	Bags delivered	Expected 19:24
17:50	Zurich	Bags delivered	Expected 19:46
17:50	Stockholm	Bags delivered	Expected 20:09
18:30	Oslo	Bags delivered	Expected 19:51
18:35	Berlin	Arrived 18:51	Expected 19:55
18:35	Gothenburg	Bags delivered	Expected 19:58
18:40	Hamburg	Bags delivered	Expected 19:57
18:40	Vienne	Bags arriving	Expected 21:11
18:45	Frankfurt	Arrived 18:51	Expected 21:25
18:50	Dusseldorf	Arrived 19:01	Expected 21:05
18:50	Belfast City	Bags delivered	Expected 21:05
18:50	Dublin	Arrived 19:02	Expected 21:05
18:50	Shannon	Arrived 19:00	Expected 21:57
18:50	Stavanger	Arrived 19:01	
19:00	Singapore	Expected 19:10	
19:05	Cologne	Expected 19:18	
19:05	Edinburgh		
19:10	Taipei	Expected 19:03	
	via: Bangkok	Expected 19:14	
		Expected 19:27	
19:35	Bangkok		
19:50	Dublin		
19:55	Cairo		
19:55	Stockholm		
20:10	Edinburgh		
20:20	Munich		
20:30	Toronto		
20:45	Frankfurt		
21:00	Istanbul		
21:05	Dublin		
21:15	Brussels		
21:15	Copenhagen		
21:20	Paris		
21:25	Lisbon		
21:25	Newark		
21:35	Stockholm		
21:35	Oslo		
21:40	Zurich		
21:50	Warsaw		
22:00	Washington		
22:15	Frankfurt		
22:15	Istanbul		
22:30	Funchal		
22:40	Lisbon		
22:50	Munich		
Flights for Wednesday, November 26 2014			
05:55	Singapore	Expected	
05:55	Chicago	Expected	
06:20	Bangkok	Expected	
06:20	Newark	Expected	
06:25	Johannesburg	Expected	
06:50	Washington	Expected	
06:55	Addis Ababa	Expected	
08:55	Houston	Expected	

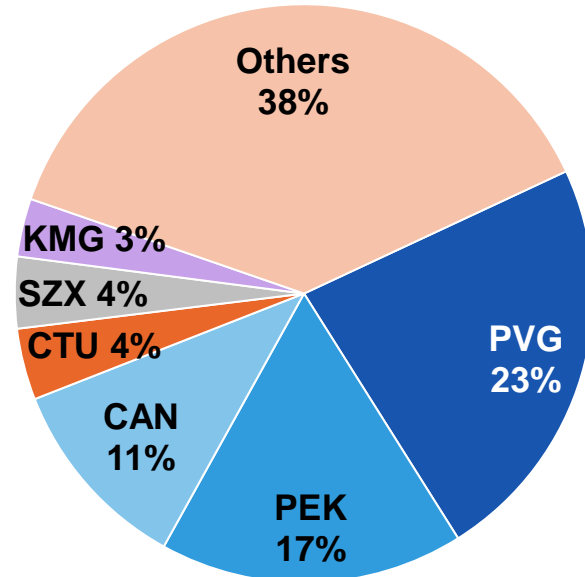
Chinese airports: Tier 1 vs Tier 2

The big three still share more than half of international seat capacity; while Tier-2 are growing in shares

2021



2019



Source: ForwardKeys Air Ticket Data.

Top 5 airports for domestic seat capacity remains unchanged

Rankings for travel in 2021 vs 2019



Source: ForwardKeys Air Ticket Data.

Recovery of domestic air travel from Tier-2 outperformed Tier-1

Airports for departures for China domestic travel in 2021; % 2019's level



Tier-1	2021/2019
Total	59%
Beijing PEK	47%
Shanghai SHA	75%
Shanghai PVG	58%
Guangzhou CAN	66%

Tier-2	2021/2019
Total	78%
Shenzhen SZX	77%
Chengdu CTU	82%
Xi'an XIY	75%
Chongqing CKG	88%
Hangzhou HGH	79%
6 other airports	74%



6 other Tier-2 cities include: Nanjing, Xi'an, Qingdao, Tianjin, Wuhan, Xiamen, Zhengzhou.



Source: ForwardKeys Air Ticket Data.



Check out the latest analysis at www.forwardkeys.com | #ForwardKeys

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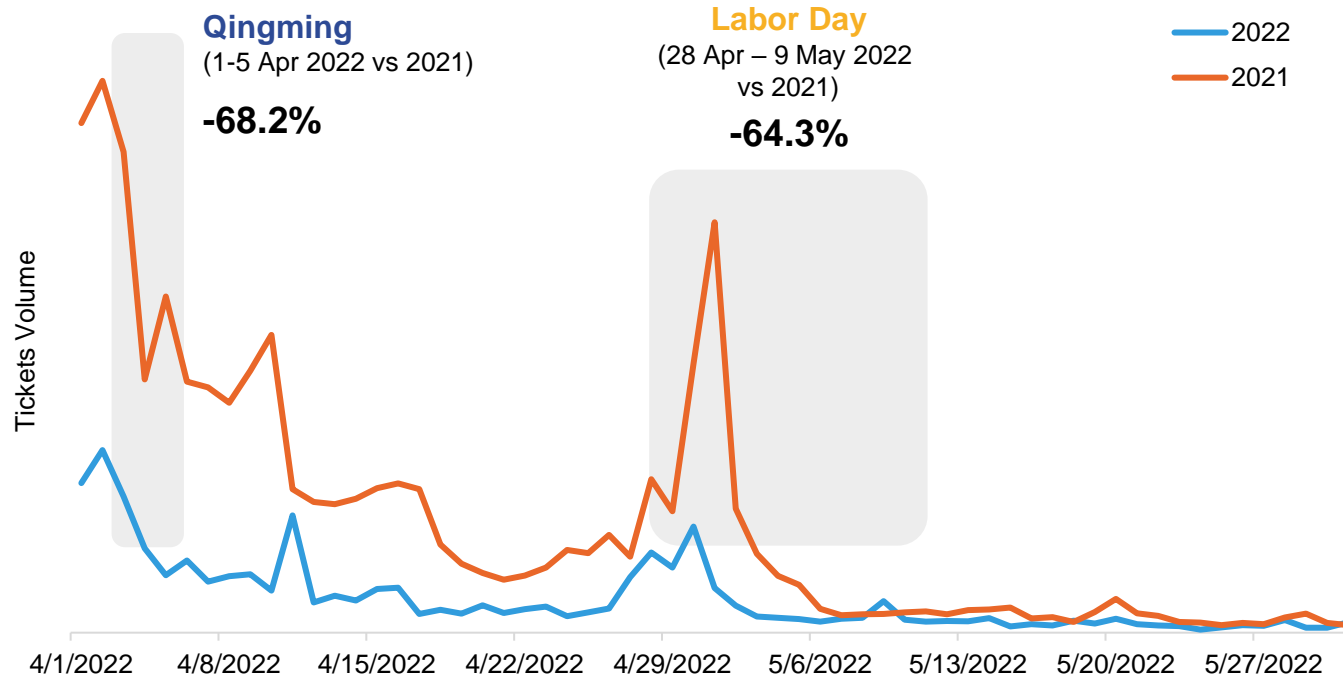
Focus: Hainan and Macau

Forwardkeys.com
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Bookings for upcoming holidays are down to Hainan

Issued tickets for travel during 1 April to 31 May 2022 vs 2021; as of 15 March

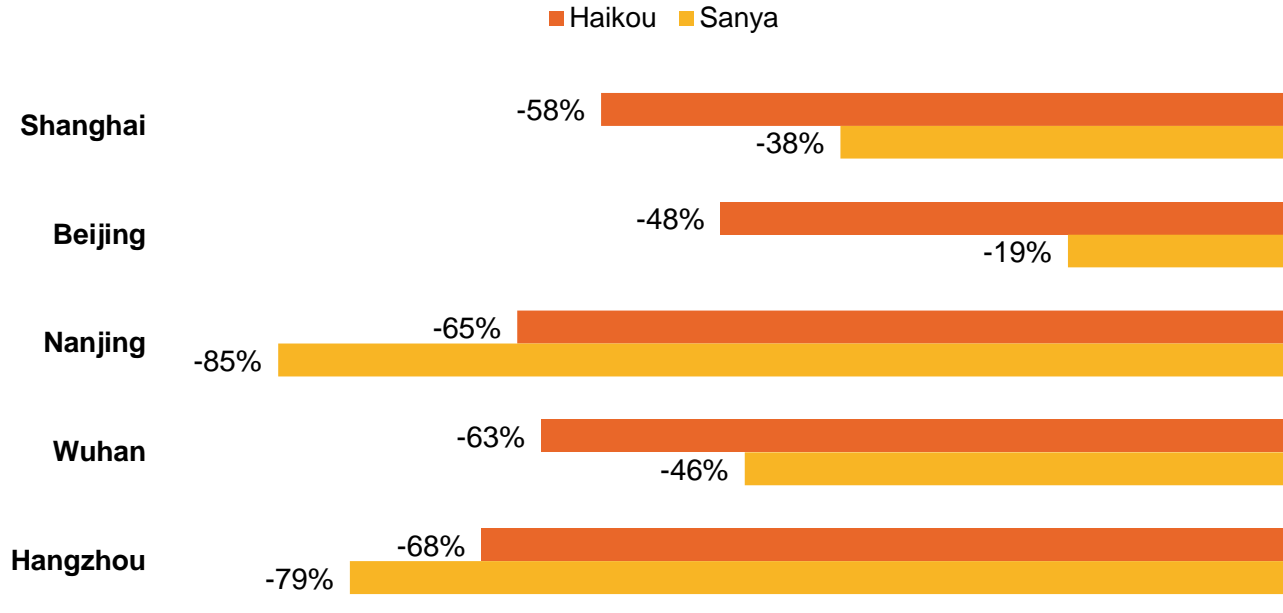


Apr - May
2022 vs 2021
-65.2%

Source: ForwardKeys Air Ticket Data.

Source market with most bookings to Haikou vs. Sanya

Issued tickets for travel during 1 April to 31 May 2022 vs 2021; as of 15 March



Source: ForwardKeys Air Ticket Data.



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Premium cabin classes are more resilient

Issued tickets for travel during 1 April to 31 May 2022 vs 2021; as of 15 March



-47%



-66%

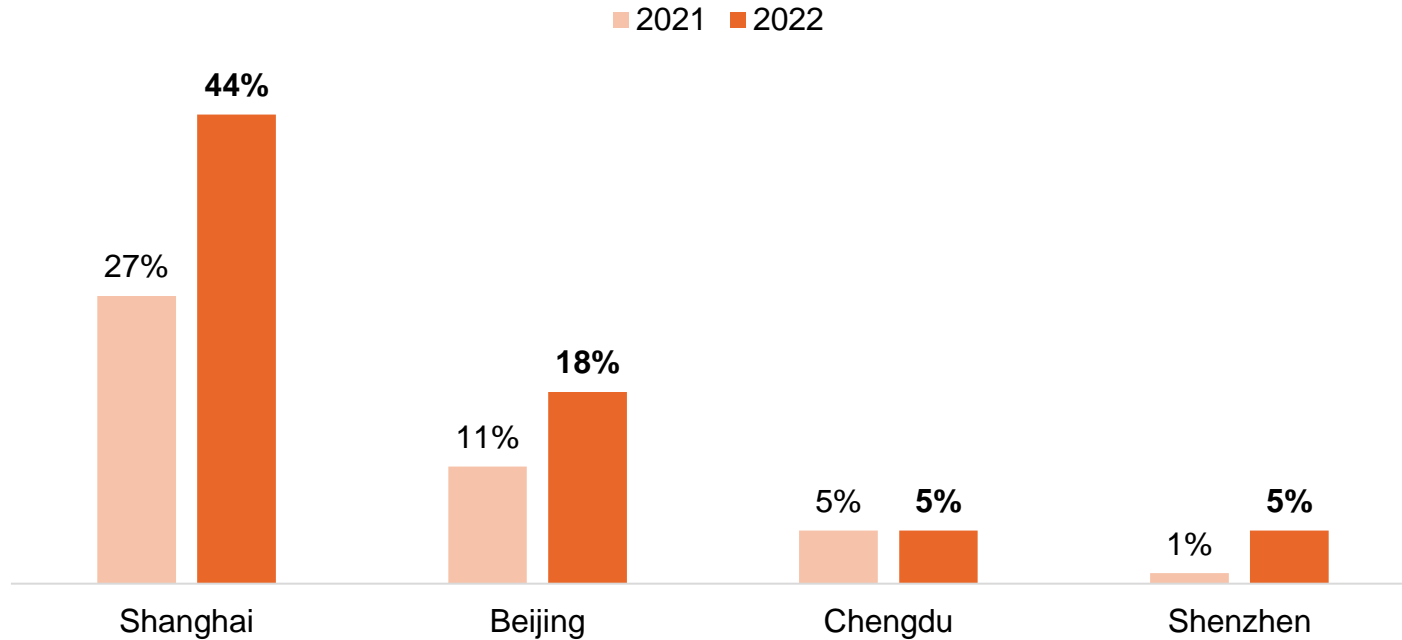
Source: ForwardKeys Air Ticket Data.



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Biggest origin markets for affluent travellers in Hainan

Issued tickets for travel during 1 April to 31 May 2022 vs 2021; as of 15 March



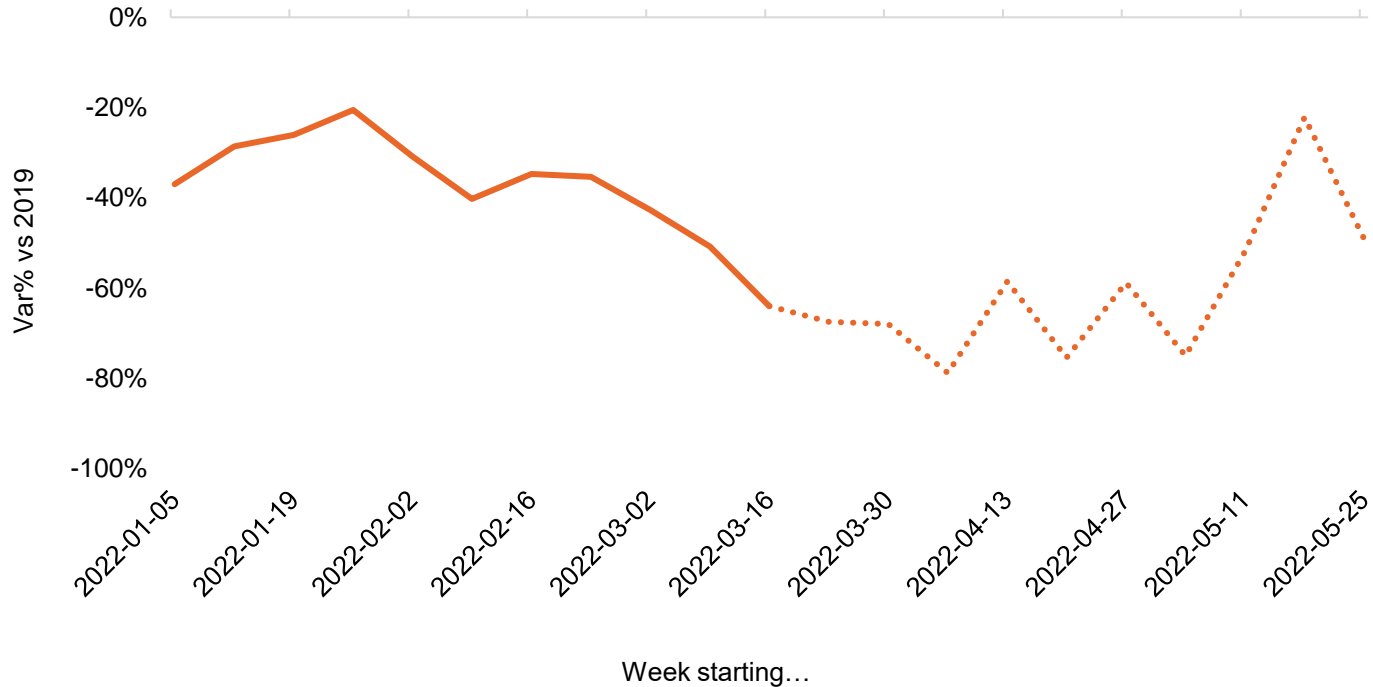
Source: ForwardKeys Air Ticket Data.



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Air travel from Mainland China to Macau

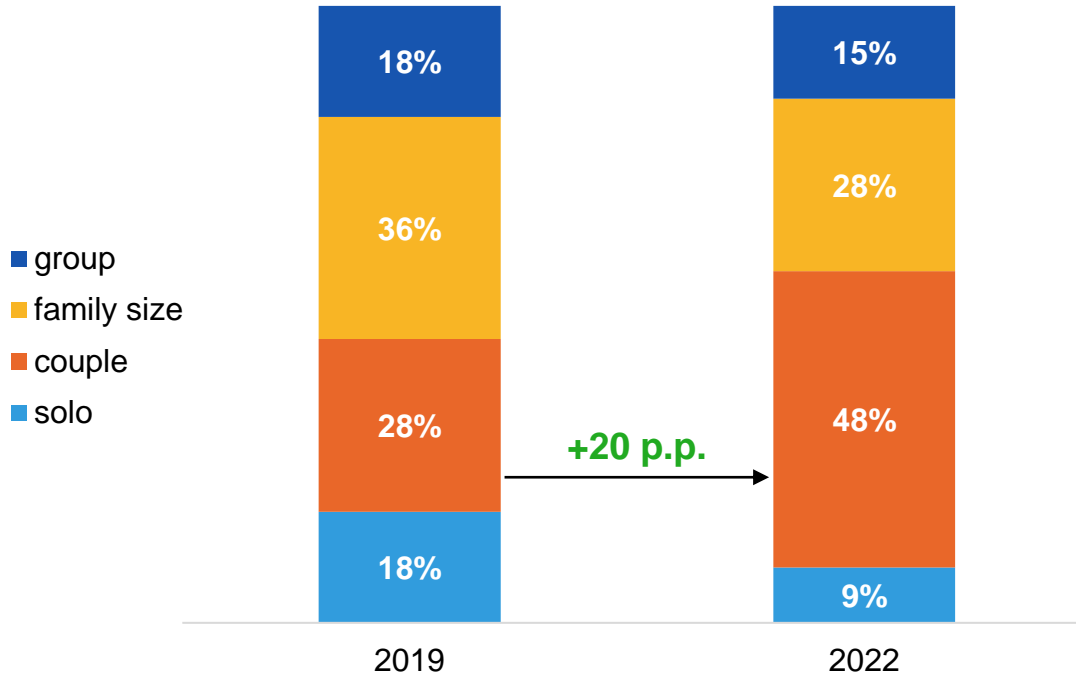
Issued tickets for travel from 5 January to 31 May 2022; as of 15 March; var% versus 2019



Source: ForwardKeys Air Ticket Data.

Macao has become an appealing honeymoon destinations for Couples

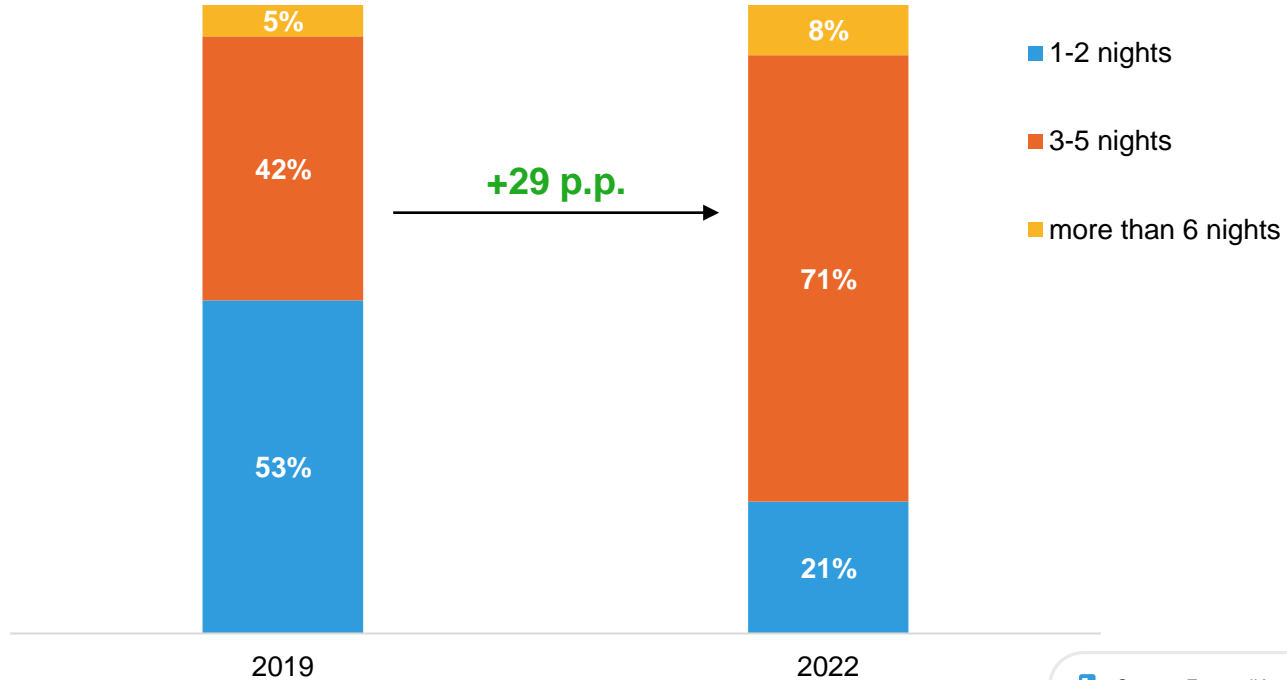
Issued tickets for travel from 5 January to 31 May 2022; as of 15 March; Shares 2022 vs. 2019



Source: ForwardKeys Air Ticket Data.

Longer Length of couples stay in Macau

Issued tickets for travel in couples from 5 January to 31 May 2022; as of 15 March; Shares 2022 vs. 2019



Source: ForwardKeys Air Ticket Data.



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Key Take-Aways

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1

Chinese domestic aviation market has been volatile: volatility has been driven in one direction by demand and in the other by Covid-19 resurgences and travel restrictions.

2

Tier-1 cities represent more than the half of international traffic; While Tier-2 cities recover faster in domestic travel

3

Hainan is more popular for affluent travellers from Beijing and Shanghai; While Macau is increasingly attractive to couples, with longer stay.



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