



**ForwardKeys**  
PREDICTING TRAVELLERS' IMPACT

APTRA Exchange

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10<sup>th</sup> May 2022



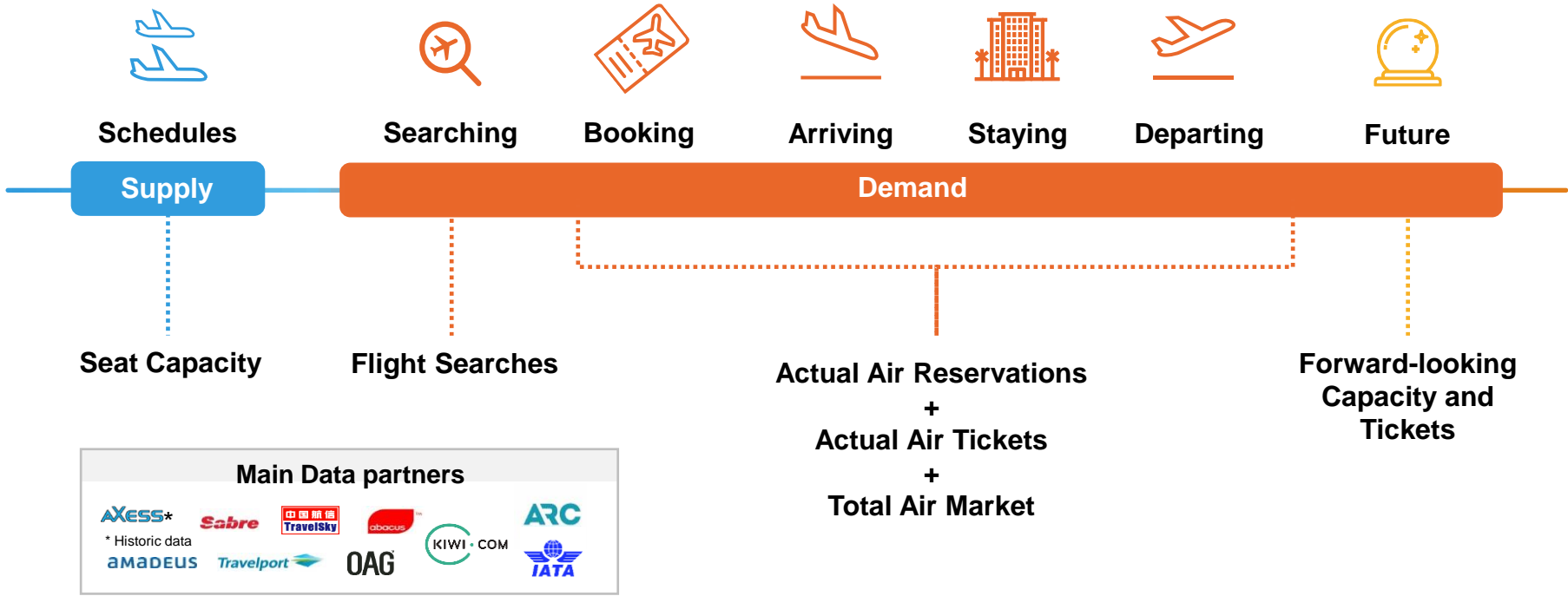
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# ForwardKeys data captures and reflects the entire traveller journey





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# Global outlook in 2022

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# International air travel numbers are unevenly dispersed

Worldwide International Arrivals in Q1 2022, compared with same period in 2019

The Americas

**-39%**

Europe

**-53%**

Asia Pacific

**-85%**

Africa & Middle East

**-41%**



Q1 2022  
vs 2019

# All regions recorded significant growth year-over-year

Worldwide International Arrivals in Q1 2022, compared with same period in 2021

The Americas  
**+160%**



Europe  
**+350%**

Asia Pacific  
**+152%**

Africa & Middle East  
**+168%**

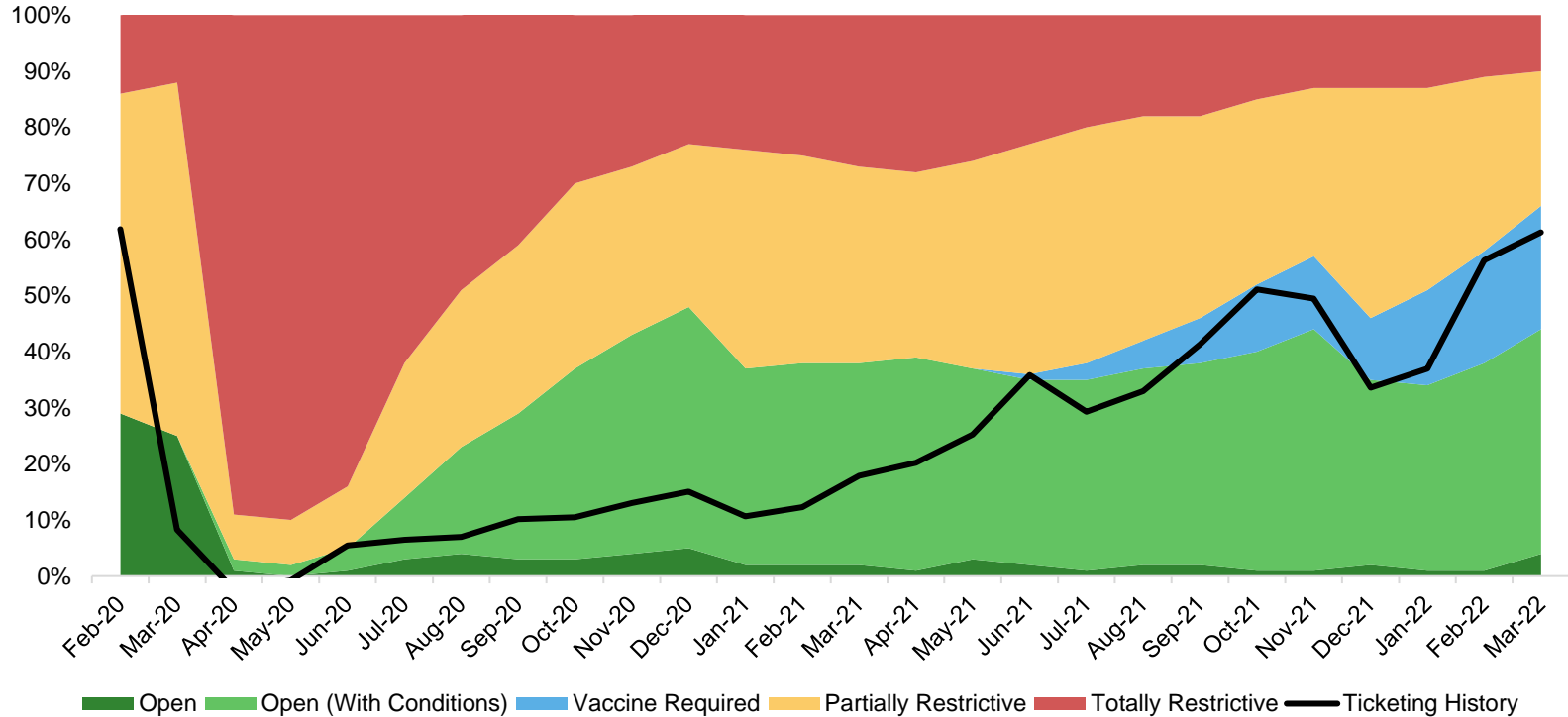


Q1 2022  
vs 2021

Source: ForwardKeys Air Ticket Data.

# When travel restrictions disappear, bookings go up

Issued tickets for air travel; compared with 2019



Source: ForwardKeys Air Ticket Data & Travel Restrictions Data.

# Q2 2022 looks more promising for international travel

Worldwide International Arrivals in Q2 2022, as of March 31; compared with same period in 2019

The Americas

**-27%**

Europe

**-40%**

Asia Pacific

**-76%**

Africa & Middle East

**-33%**



Q2 2022  
vs 2019





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# Summer outlook

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# Caribbean and Latin American destinations are leading the summer outlook

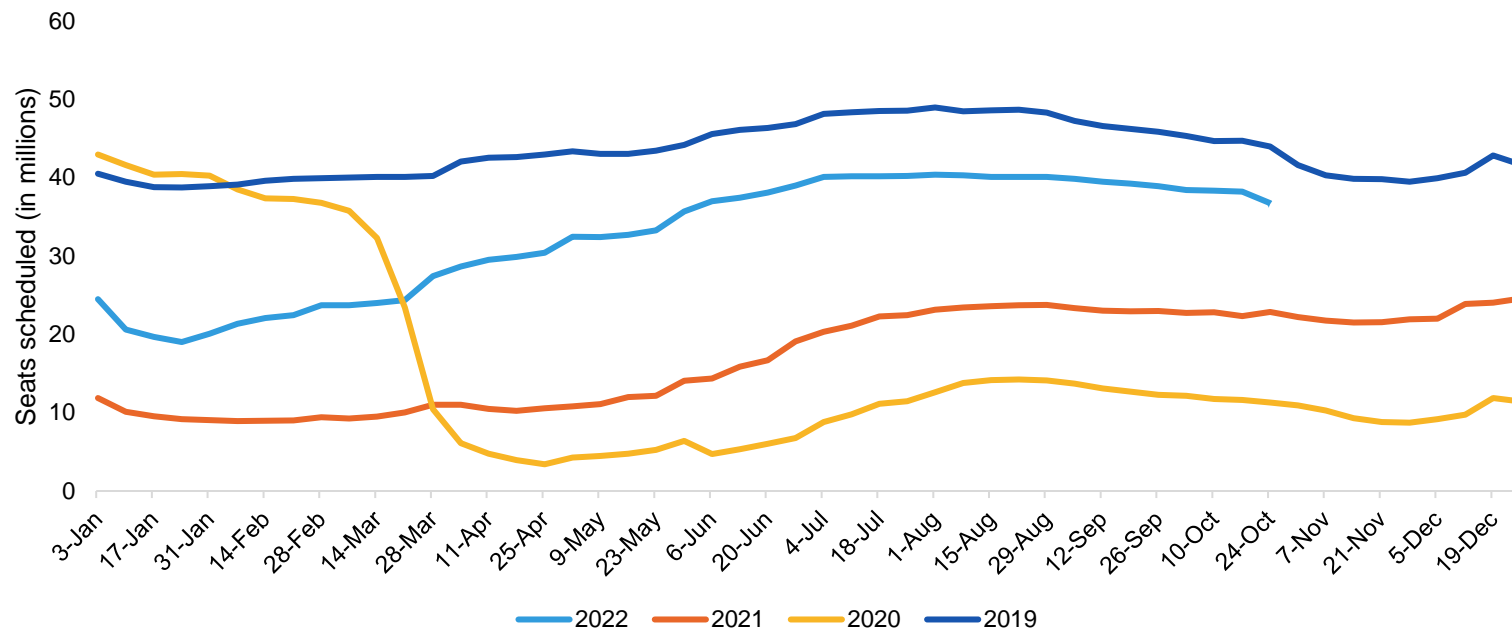
On-the-book worldwide international arrivals in Jul-Aug 2022 as of 5 April 2022; compared with same period in 2019

Most resilient destinations		Var vs 2019
1 <sup>st</sup>	Costa Rica	+30%
2 <sup>nd</sup>	Aruba	+23%
3 <sup>rd</sup>	Dominican Republic	+16%
4 <sup>th</sup>	Jamaica	+15%
5 <sup>th</sup>	Pakistan	+14%
6 <sup>th</sup>	Mexico	+10%
7 <sup>th</sup>	Bahamas	-2%
8 <sup>th</sup>	Colombia	-5%
9 <sup>th</sup>	India	-10%
10 <sup>th</sup>	Iceland	-11%

Most resilient destinations		Var vs 2019
11 <sup>th</sup>	Greece	-11%
12 <sup>th</sup>	Tanzania	-12%
13 <sup>th</sup>	Qatar	-18%
14 <sup>th</sup>	Egypt	-19%
15 <sup>th</sup>	Brazil	-20%
16 <sup>th</sup>	Ecuador	-21%
17 <sup>th</sup>	Portugal	-22%
18 <sup>th</sup>	Turkey	-26%
19 <sup>th</sup>	Spain	-27%
20 <sup>th</sup>	France	-27%
	<b>TOTAL</b>	<b>-39%</b>

# Flights schedules stabilize in 2022

Scheduled capacity for worldwide international arrivals in 2019, 2020, 2021 and Jan – Oct 2022



Source: ForwardKeys Seat Capacity Data.

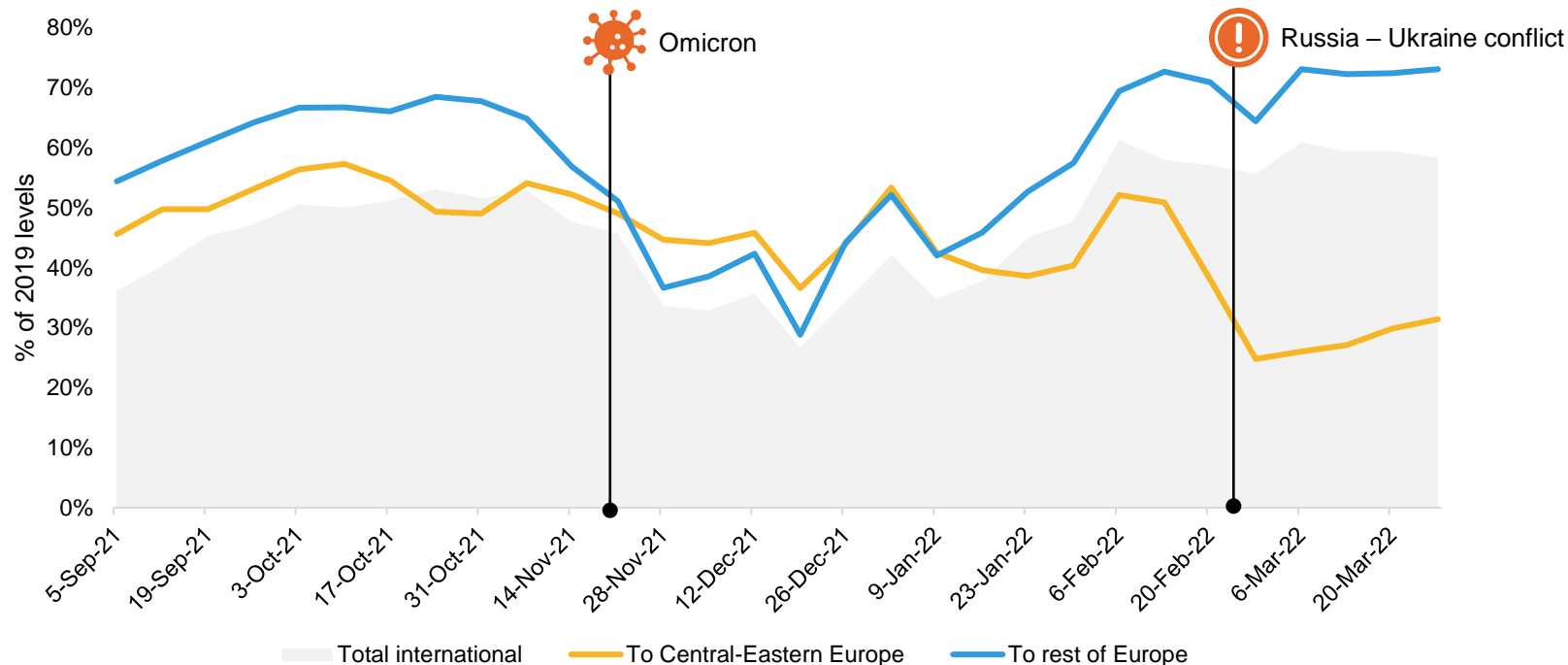


# Expect the unexpected

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# Strong rebound after initial fear in parts of Europe over the Russia-Ukraine conflict

Worldwide international tickets issued between Sep 2021 and March 2022, % of 2019 levels



Source: ForwardKeys Air Ticket Data.



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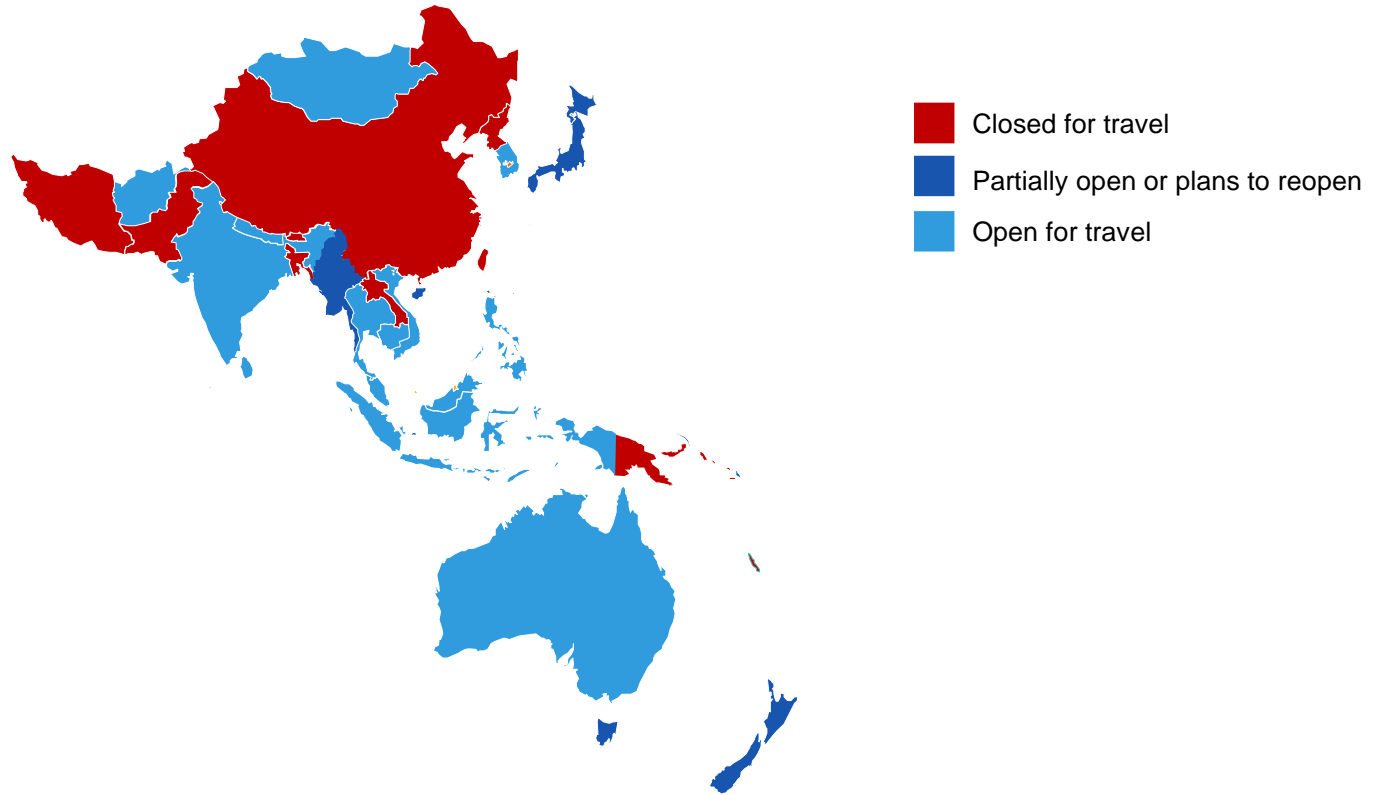
# Travel recovery: APAC

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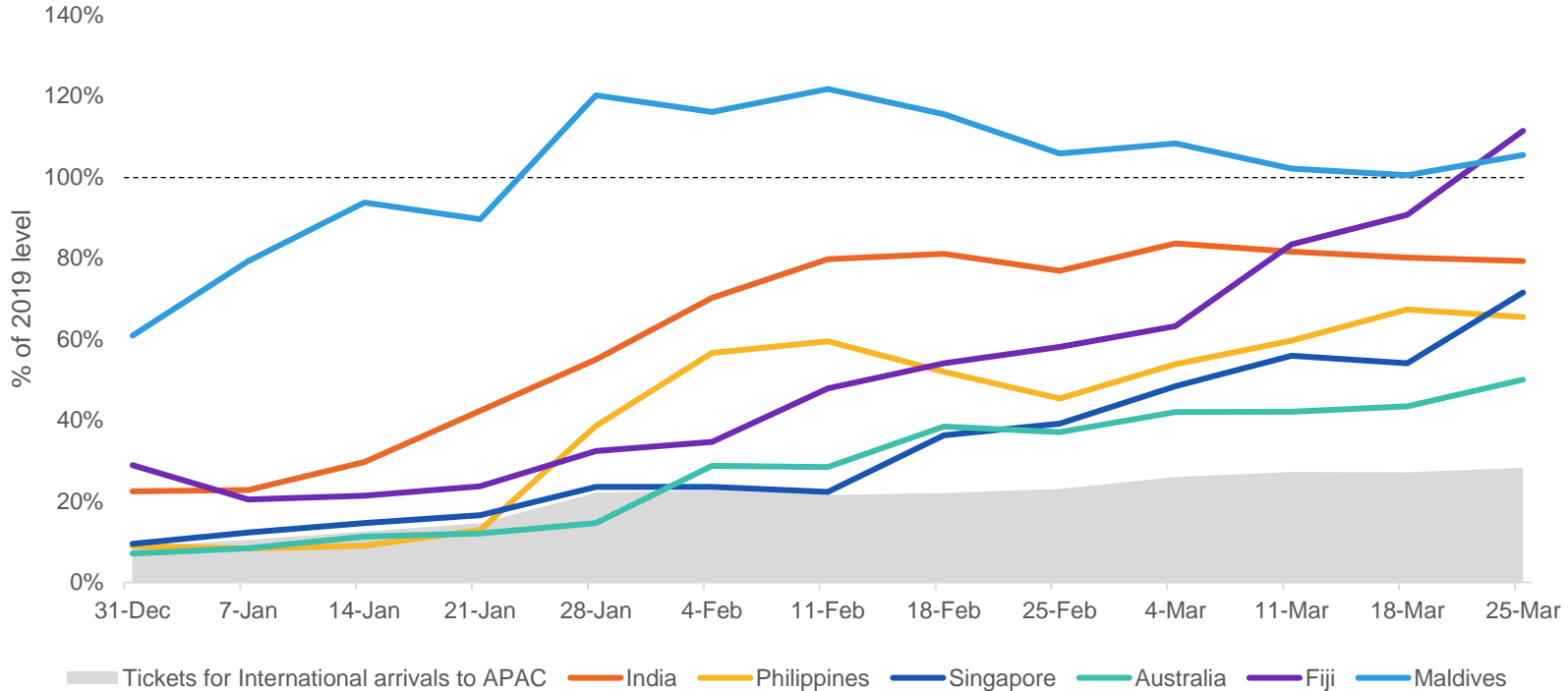


# More countries in APAC region are welcoming international travellers



# Travel recovery for some APAC destinations is well on its way

International Ticketing History for Arrivals from 31 December 2021 until 31 March 2022; as % of 2019



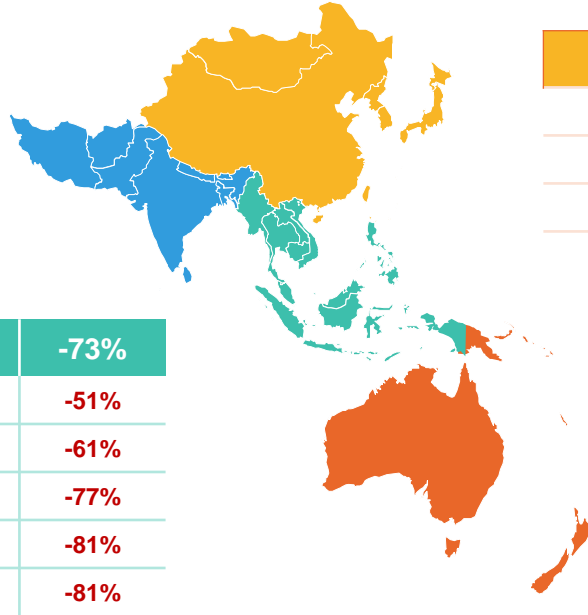
Source: ForwardKeys Air Ticket Data.



# The recovery is uneven in the subregions in APAC...

On-the-book arrivals in Q2 2022, as of 2 April 2022; var vs 2019

South Asia		-16%
	Maldives	+1%
	India	-14%
	Sri Lanka	-33%



North East Asia		-94%
	South Korea	-82%
	Japan	-93%
	China	-99%

South East Asia		-73%
	Philippines	-51%
	Singapore	-61%
	Cambodia	-77%
	Thailand	-81%
	Malaysia	-81%

Oceania		-70%
	Fiji	-29%
	Australia	-70%
	New Zealand	-87%

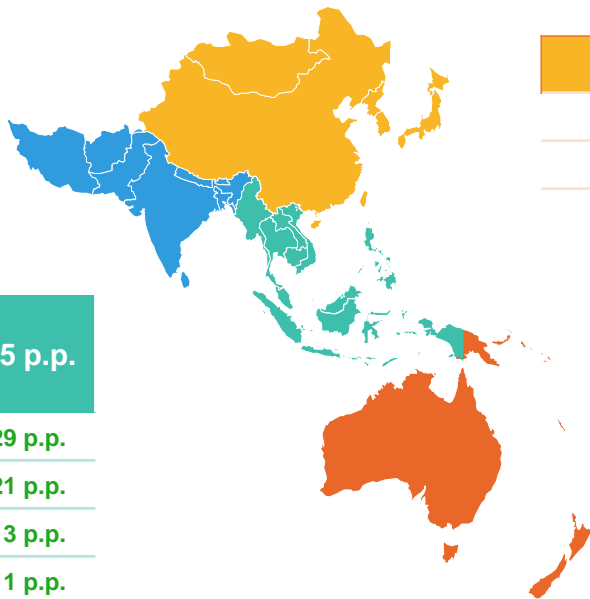
 Source: ForwardKeys Air Ticket Data.

# ... but the rebound of international travel is accelerating in all key regions

On-the-book arrivals in Q2 2022, as of 2 April 2022; change in variation vs 2019 compared to Q1 2022

## Change in variations of recovery between Q2 and Q1

South Asia		+30 p.p.
	India	+46 p.p.
	Sri Lanka	+21 p.p.
	Maldives	+6 p.p.



North East Asia		+3 p.p.
	South Korea	+13 p.p.
	Japan	+4 p.p.
	China	0 p.p.

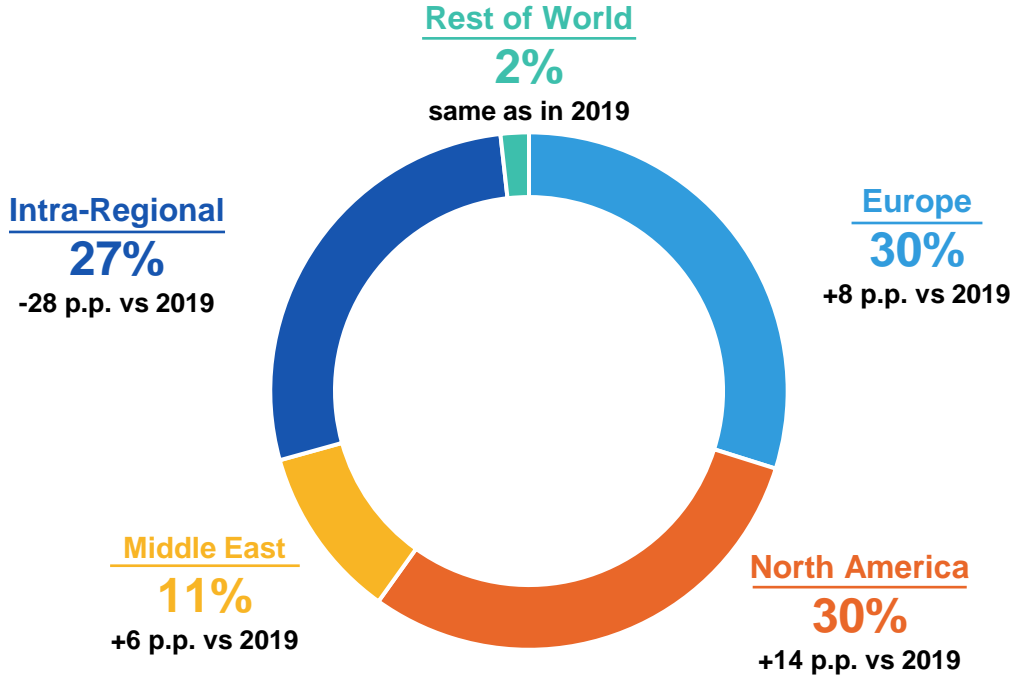
South East Asia		+15 p.p.
	Philippines	+29 p.p.
	Singapore	+21 p.p.
	Cambodia	+13 p.p.
	Malaysia	+11 p.p.
	Thailand	+8 p.p.

Oceania		+18 p.p.
	Fiji	+31 p.p.
	Australia	+17 p.p.
	New Zealand	+9 p.p.

Source: ForwardKeys Air Ticket Data.

# The rebound of intra-regional travel will be key for the recovery of APAC

On-the-Book International Arrivals into APAC in Q2 2022, as of 2 April 2022; vs 2019 levels



Source: ForwardKeys Air Ticket Data.



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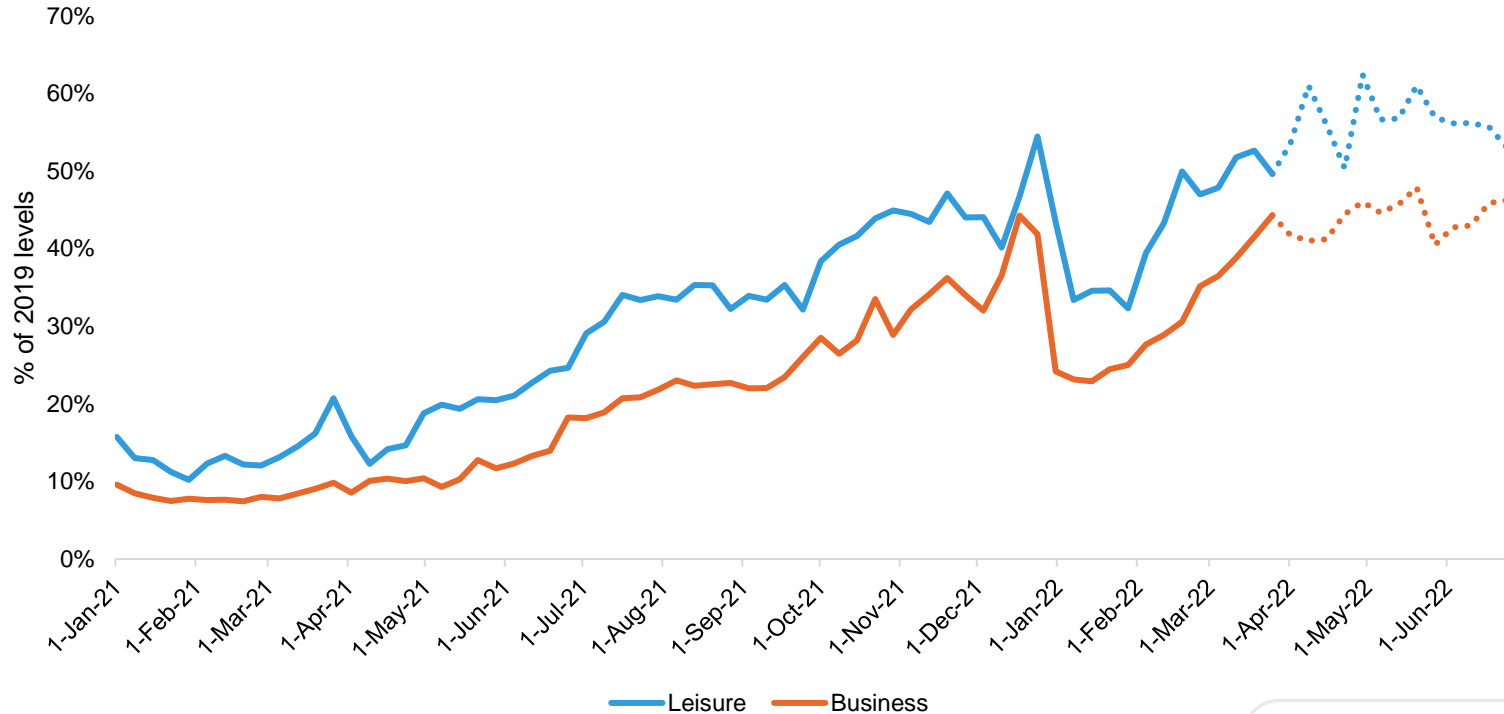
# What is the new normal?

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# Leisure travel is still driving the recovery, but business travel is catching-up

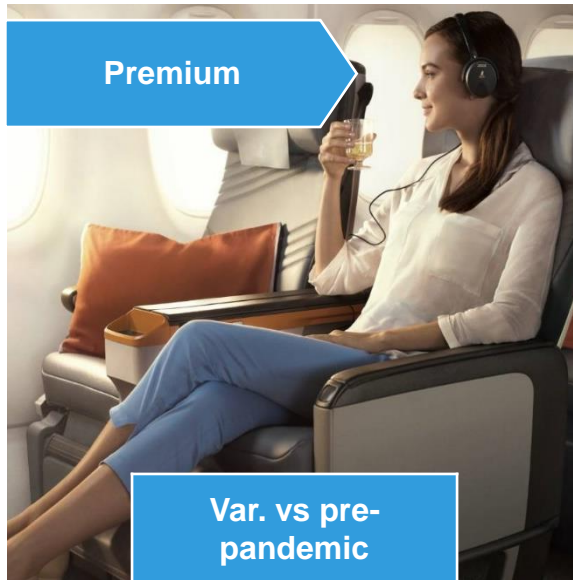
Global international travel from 2021 to Q1 2022, and OTB arrivals until June 2022 as of 1 April 2022; % of 2019 levels



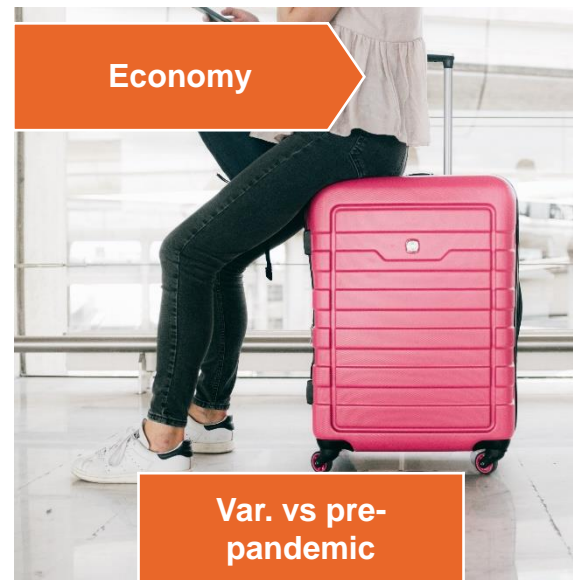
Source: ForwardKeys Air Ticket Data.

## Premium cabin classes are in demand

On-the-book international arrivals worldwide from April to June 2022, as of 1 April 2022; vs 2019



**-27%**



**-47%**

Source: ForwardKeys Air Ticket Data.

## Take-Aways

1

Travel to APAC has been accelerating into recovery mode, with destinations gradually reopening.

2

Q2 2022 looks more promising for global international travel than Q1. For summer holiday travel, sun and sea destinations in the Caribbean and Latin America are the most booked countries.

3

Even though leisure travel is still leading the recovery, business travel is catching up.

4


There is a stronger reactivation among the affluent traveller profile.



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