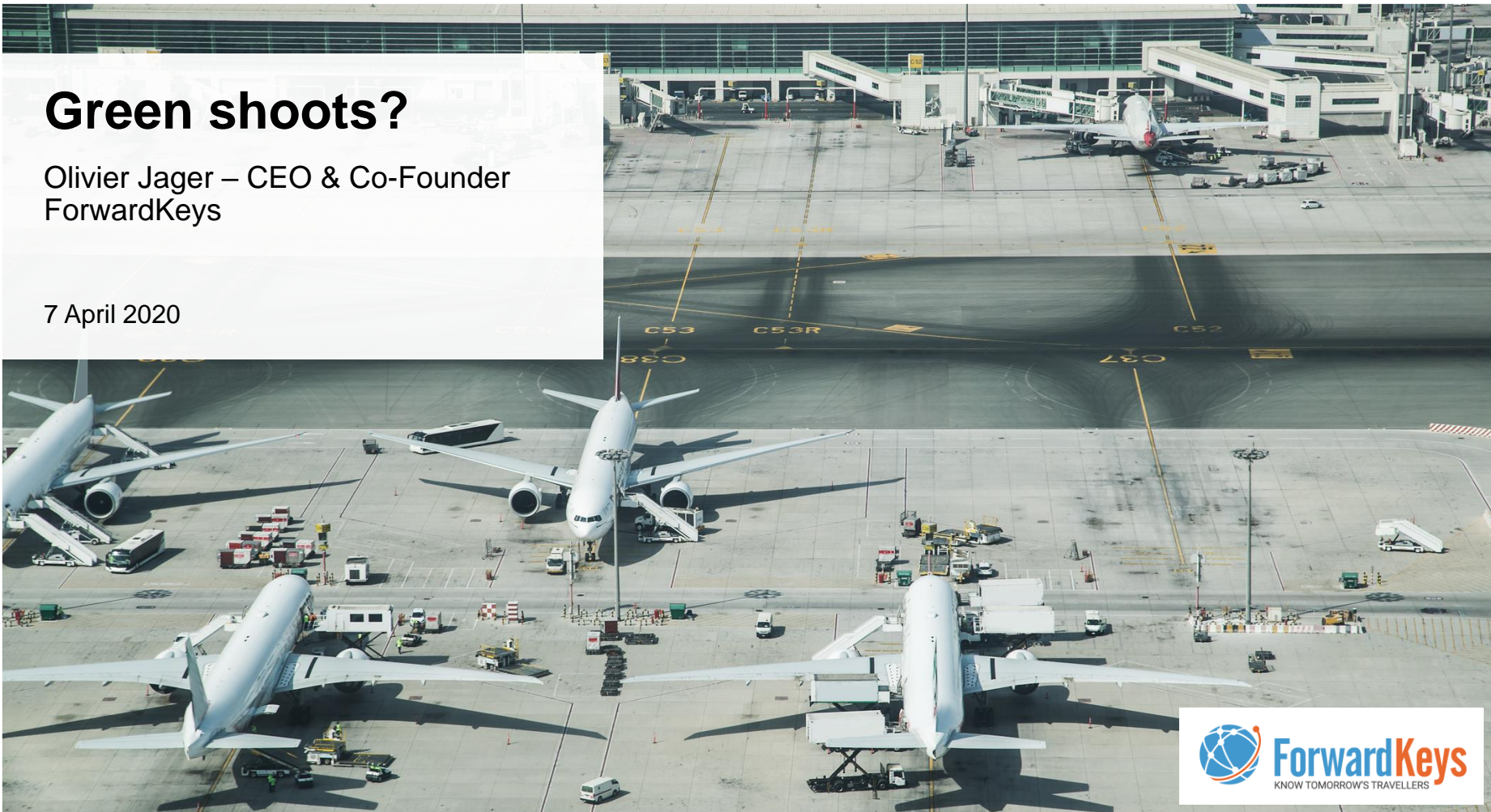


# Green shoots?

Olivier Jager – CEO & Co-Founder  
ForwardKeys

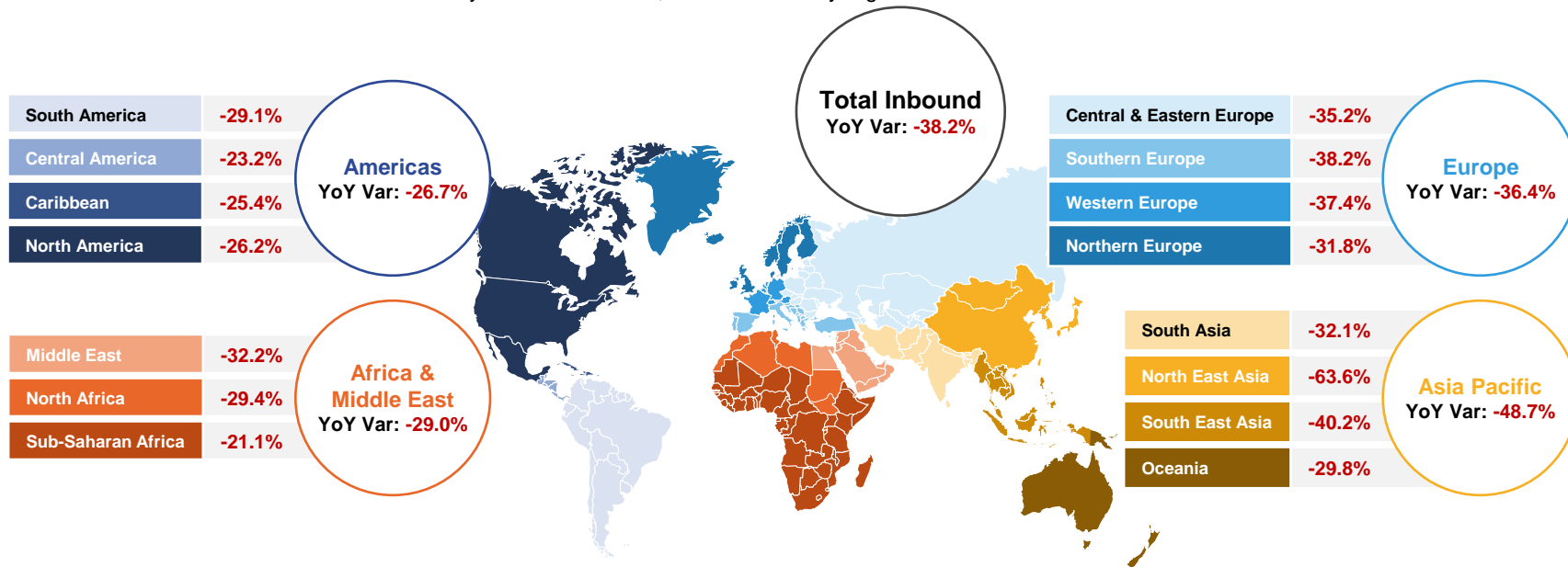
7 April 2020



# International arrivals dive worldwide in Q1 2020

## Arrivals to world regions Jan-Mar 2020\*

1 January to 31 March 2020; Market shares by region and Year-on-Year variations



Subregion YoY variation

\* excluding domestic



Arrivals from 1 January to 31 March 2020 vs same period in 2019.



Only considered pax staying 1 to 21 nights at destinations.

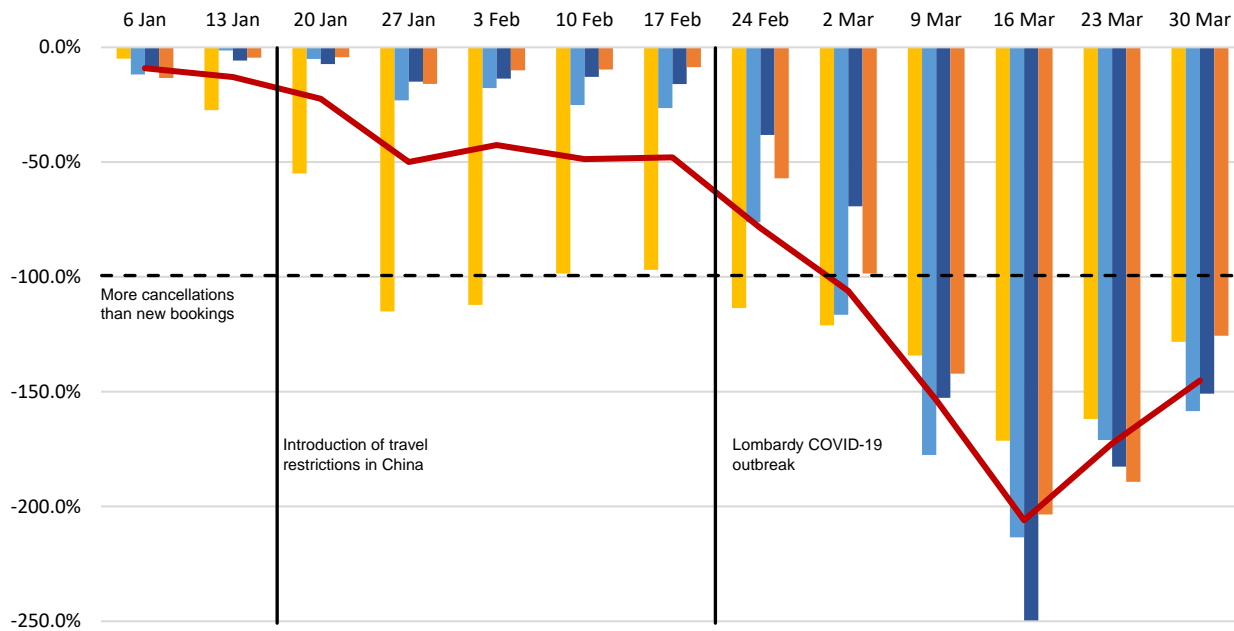


Source: ForwardKeys air reservation data.

# International bookings take a sharp halt

## Bookings made for International travel by departure region

6 January to 5 April, Year on Year variations



### Bookings made in Q1\*

YoY % change

Asia Pacific	-96.8%
Europe	-74.5%
Americas	-79.1%
Africa & Middle East	-66.0%
<b>Total Global</b>	<b>-80.4%</b>

\*Bookings made from 6 January to 5 April



Booking made from 6 January to 5 April 2020 vs same period in 2019 for future travel at any time.



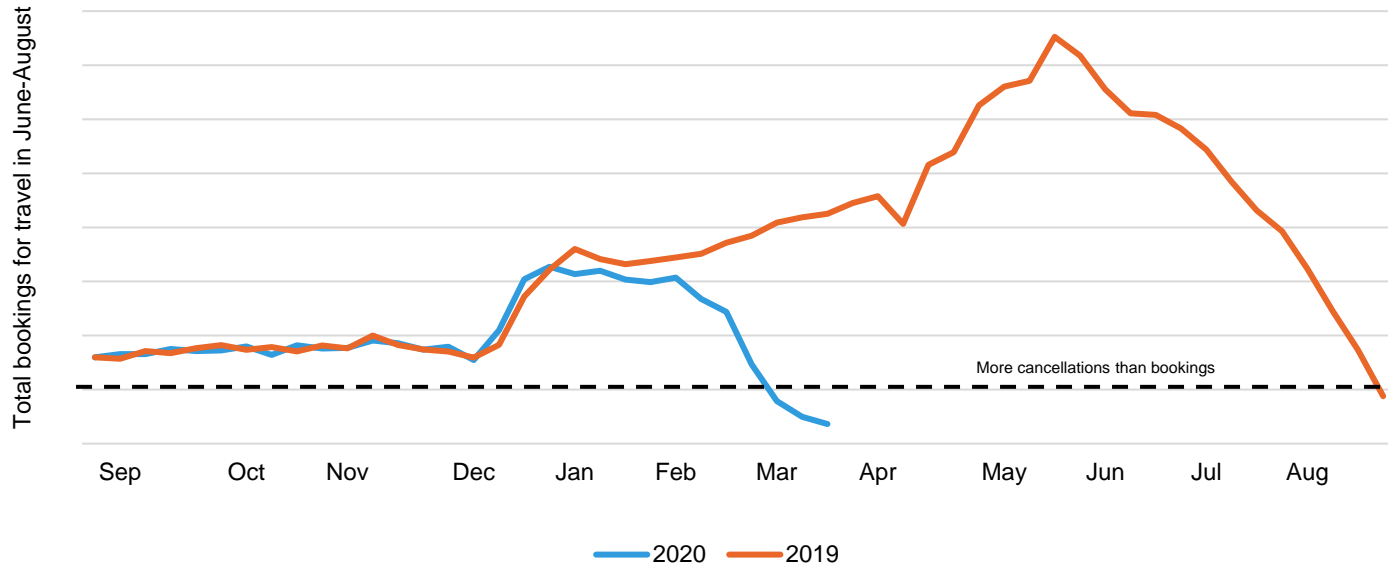
Only considered pax staying 1 to 21 nights at destinations.





Source: ForwardKeys air reservation data.


# Not all is lost for Summer: 53% of bookings occur in May-August

## International flight bookings to the Americas for travel in June, July and August



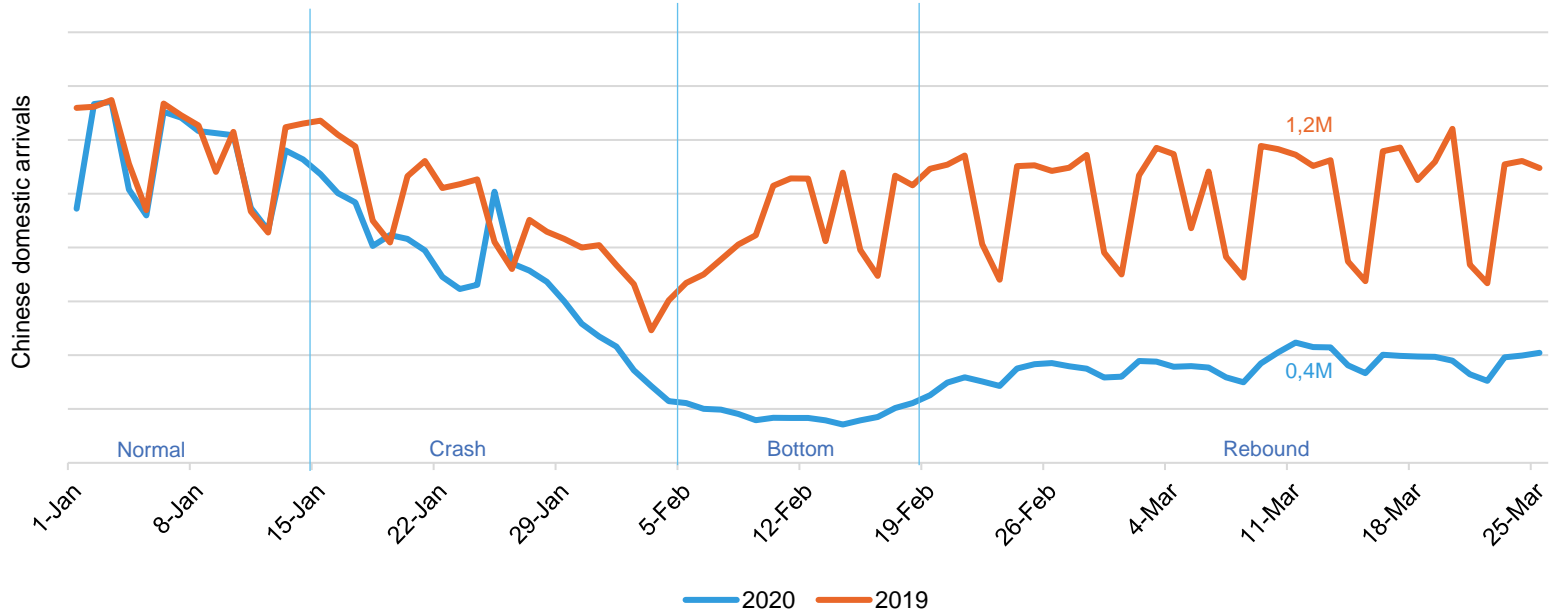
 Bookings made from 1 September 2019 to 31 March 2020 vs same period last year, for travel in June – August 2020 vs travel in June – August 2019.

 Only considered pax staying 1 to 21 nights at destinations.

 Source: ForwardKeys air reservation data.

# Domestic travel within China is starting to breath some life

## China domestic daily reservations Q1 2020 vs 2019



Arrivals from 13 January to 22 March 2020 vs same period in 2019.



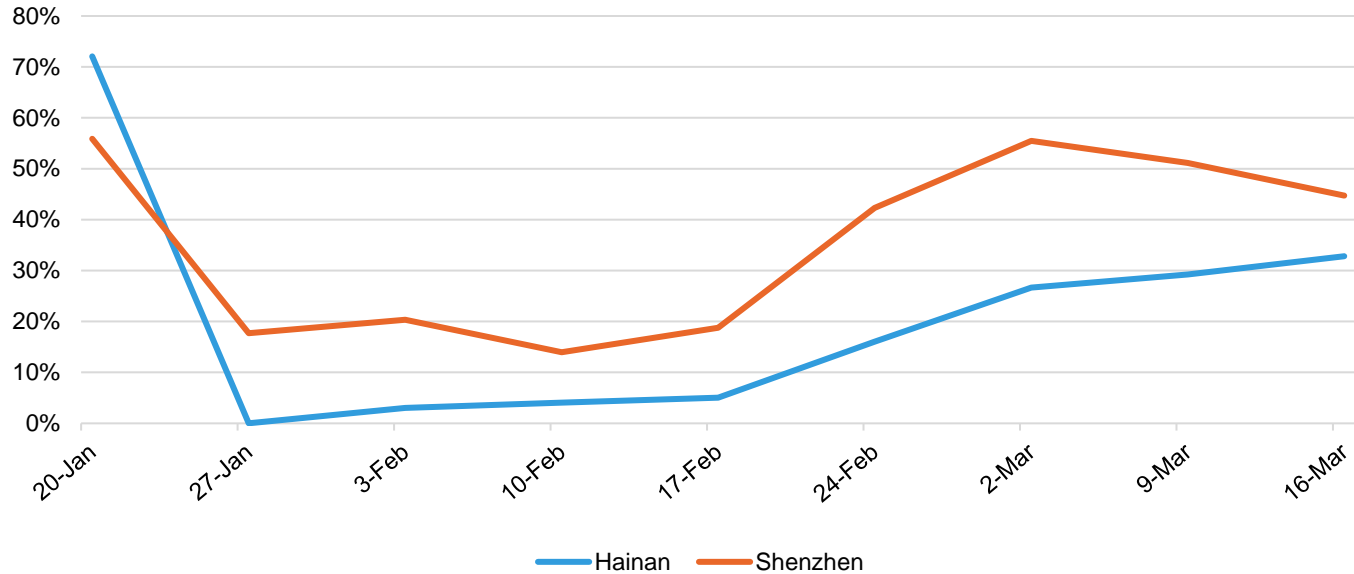
Only considered pax staying at least 1 night at destinations.



Source: ForwardKeys Actual Air Tickets.

# Both leisure and corporate travel recover slowly but at a different pace

### China domestic arrivals to Hainan and Shenzhen % of 2019 volumes



Arrivals from 20 January to 22 March 2020 vs same period in 2019.



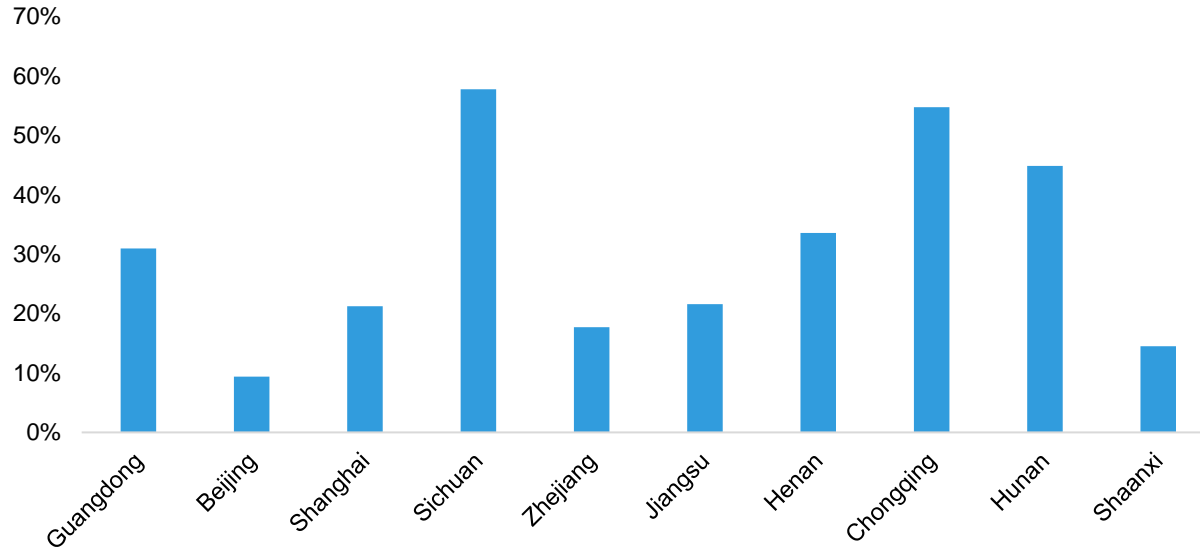
Only considered pax staying at least 1 night at destinations.



Source: ForwardKeys Actual Air Tickets.

# Second-tier origin markets in China show signs of recovery

### Top 10 origins to Hainan % of 2019 volume



Arrivals from 24 February to 22 March  
2020 vs same period in 2019.



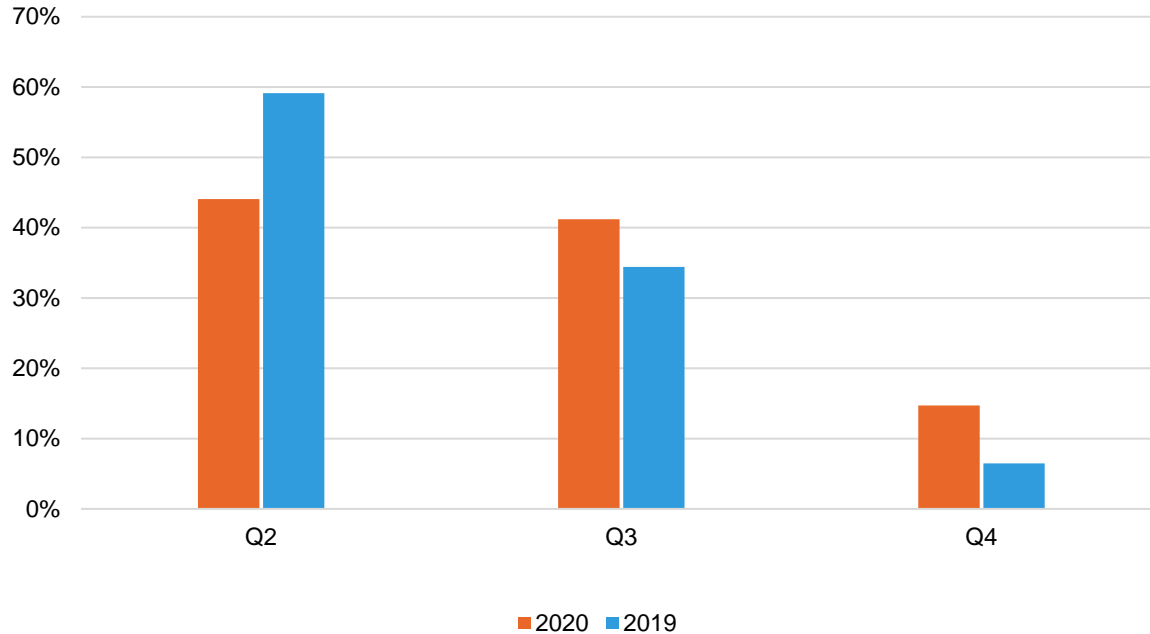
Only considered pax staying at  
least 1 night at destinations.



Source: ForwardKeys Actual Air Tickets.

# People are thinking about travelling in Q3 & Q4!!

Breakdown of flight searches from Italy performed in March for a departure in...



Flight searches from 1 to 31 March 2020 vs same period in 2019.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Flight Search data.






**ForwardKeys**  
KNOW TOMORROW'S TRAVELLERS


# THANK YOU




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