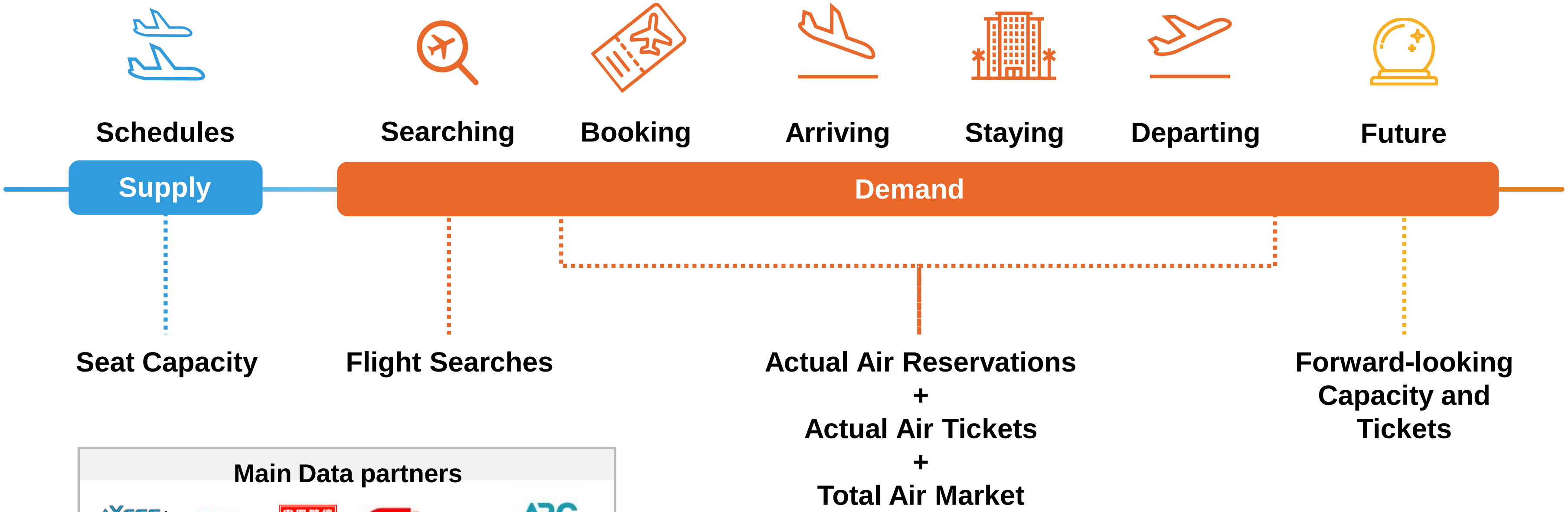
ForwardKeys
PREDICTING TRAVELLERS' IMPACT

State of Play for the European Tourism Industry 2022

Juan Gomez, Head of Market Intelligence

May 2022

ForwardKeys data captures and reflects the entire traveller journey



Schedules

Supply

Seat Capacity

Searching

Booking

Arriving

Staying

Departing

Future

Demand

Flight Searches

Actual Air Reservations
+
Actual Air Tickets
+
Total Air Market

Forward-looking Capacity and Tickets

Main Data partners

AXESS*

Sabre

中国航信 TravelSky

abacus

ARC

* Historic data

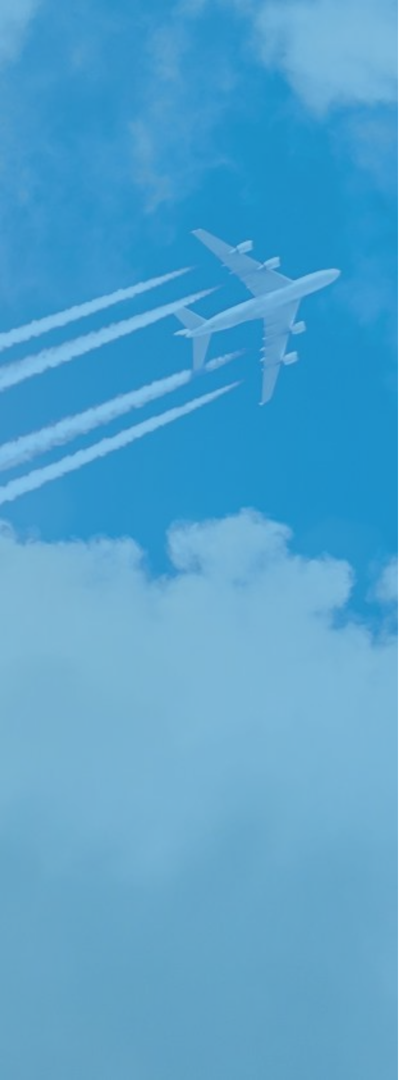
KIWI.COM

amadeus

Travelport

OAG

IATA



Topics

1. **Global outlook**

2. **Focus on Europe**

3. **Future outlook**

2022 Global Outlook

The race to recovery

Forwardkeys.com
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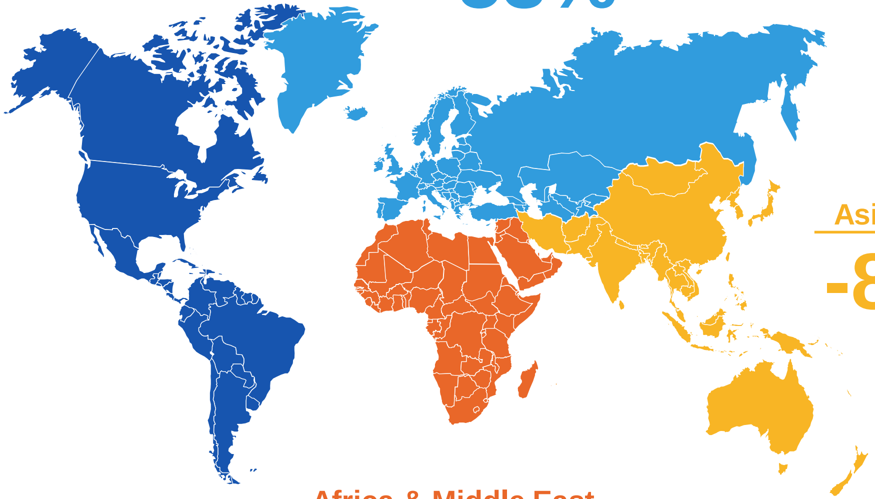
Global Recovery is spread unevenly around the world

Worldwide International Arrivals in Q1 2022, vs 2019 levels



Total International Inbound

-59%

Source: ForwardKeys Air Ticket Data.

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

…but Q2 is more promising

Worldwide International Arrivals in Q1 and Q2 2022, vs 2019 levels

Europe

Q1: -53%

Q2: -36%

The Americas

Q1: -39%

Q2: -25%

Asia Pacific

Q1: -85%

Q2: -75%

Africa & Middle East

Q1: -41%

Q2: -29%

Total International Inbound

Q1: -59%

Q2: -43%

Source: ForwardKeys Air Ticket Data.

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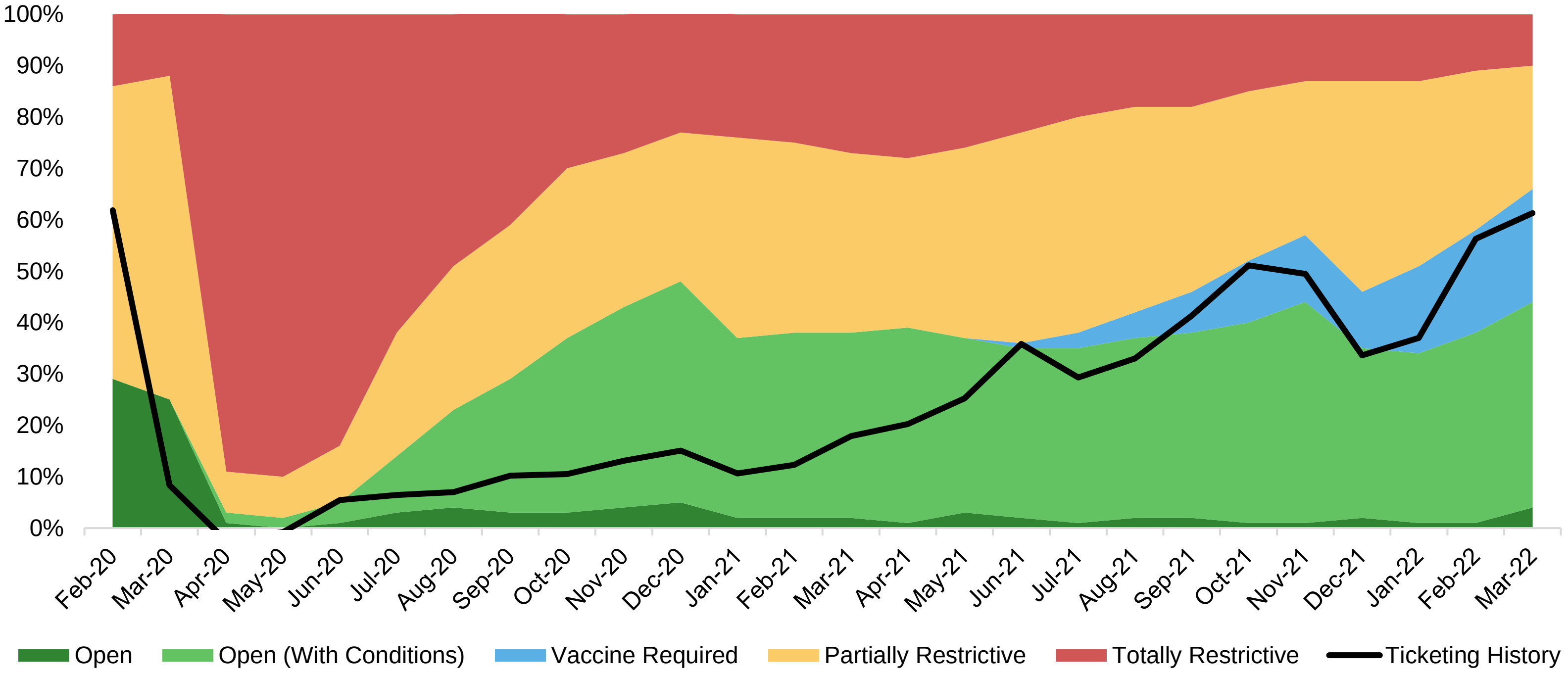
Inbound travel restrictions vs Global International travel

Issued tickets for air travel; compared with 2019

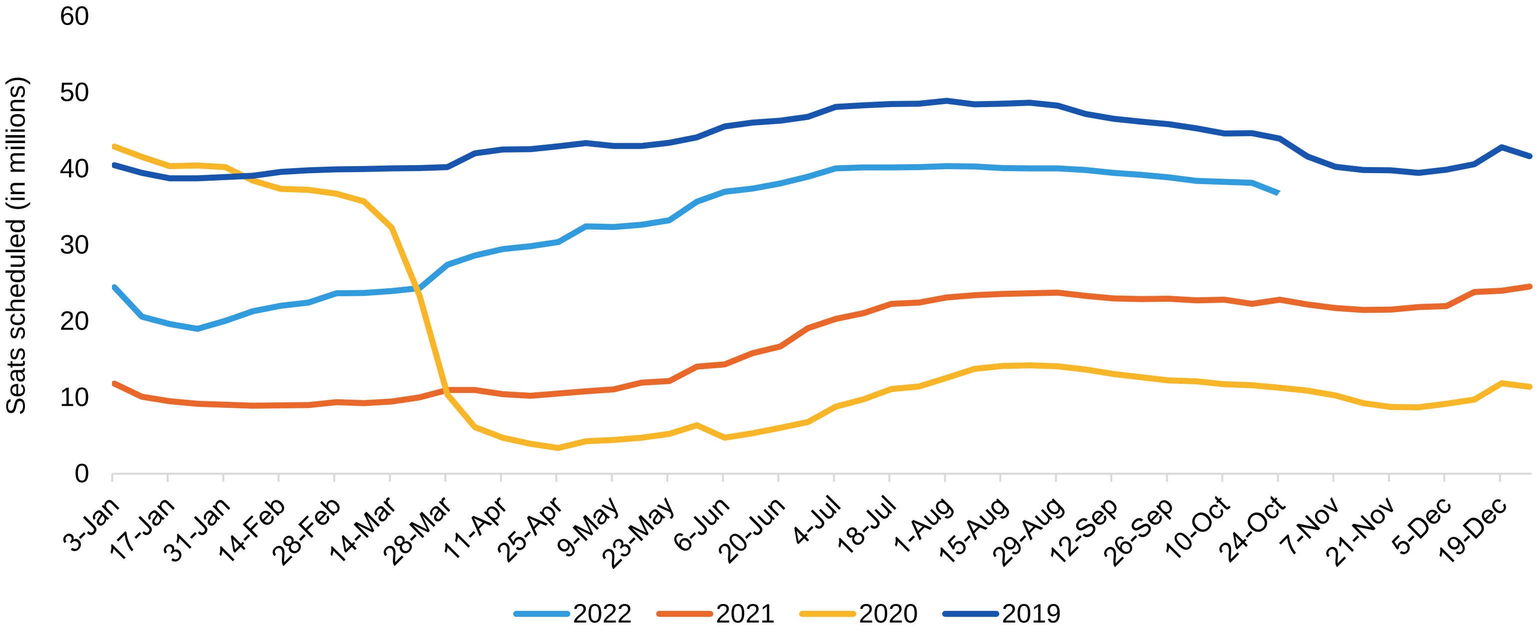


Source: ForwardKeys Air Ticket Data & Travel Restrictions Data.

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

Flights schedules stabilise in 2022

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



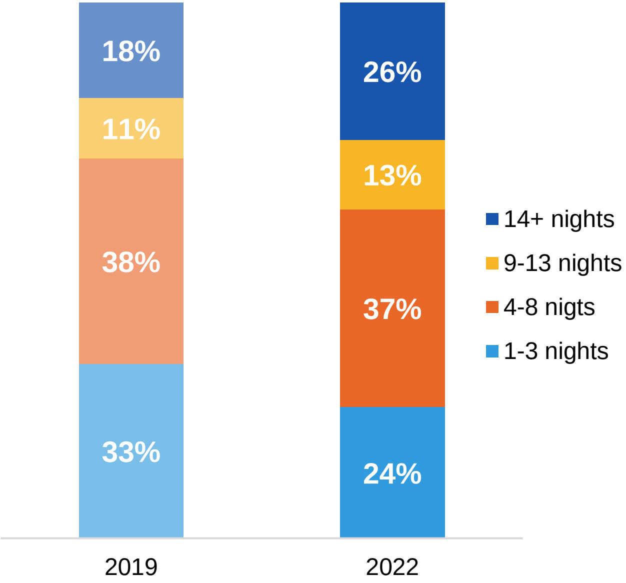
Source: ForwardKeys Seat Capacity Data.

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

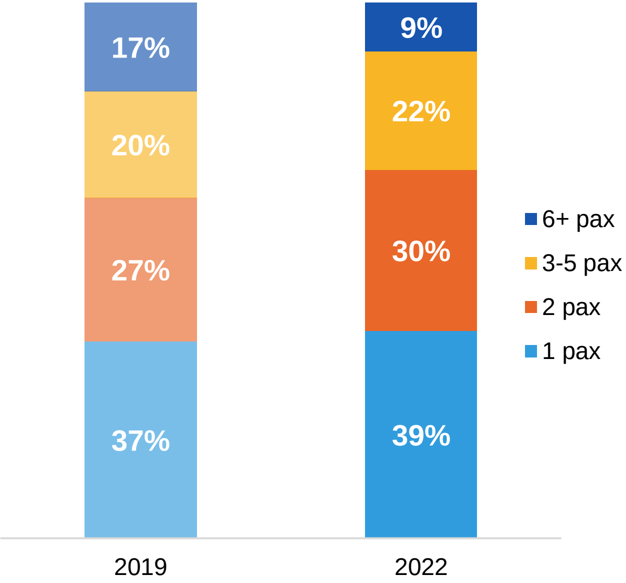
Travel behaviour has changed

Worldwide international arrivals in Q1 2022; vs same period in 2019

Increased share of longer stays



Group travel has faded away



Source: ForwardKeys Air Ticket Data.

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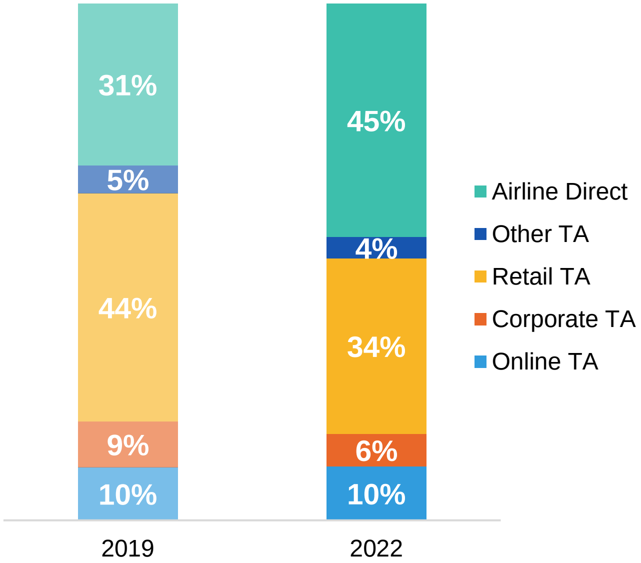
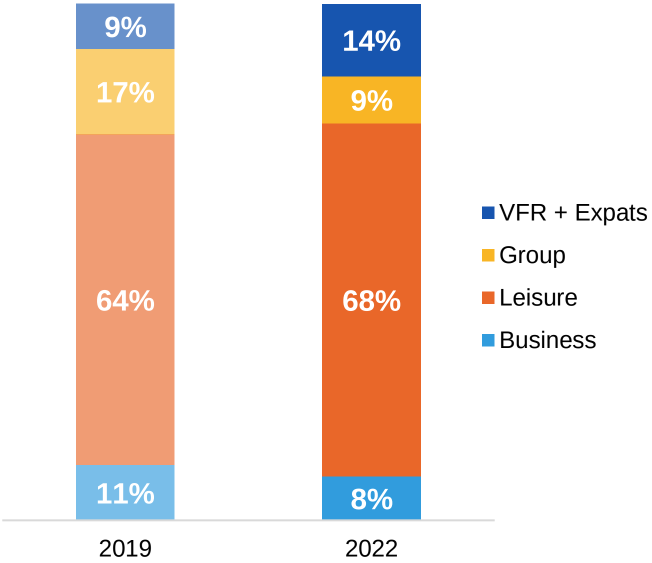
Travel behaviour has changed

Worldwide international arrivals in Q1 2022; vs same period in 2019

More Airline direct bookings



The recovery is driven by VFR and Leisure passengers



Source: ForwardKeys Air Ticket Data.

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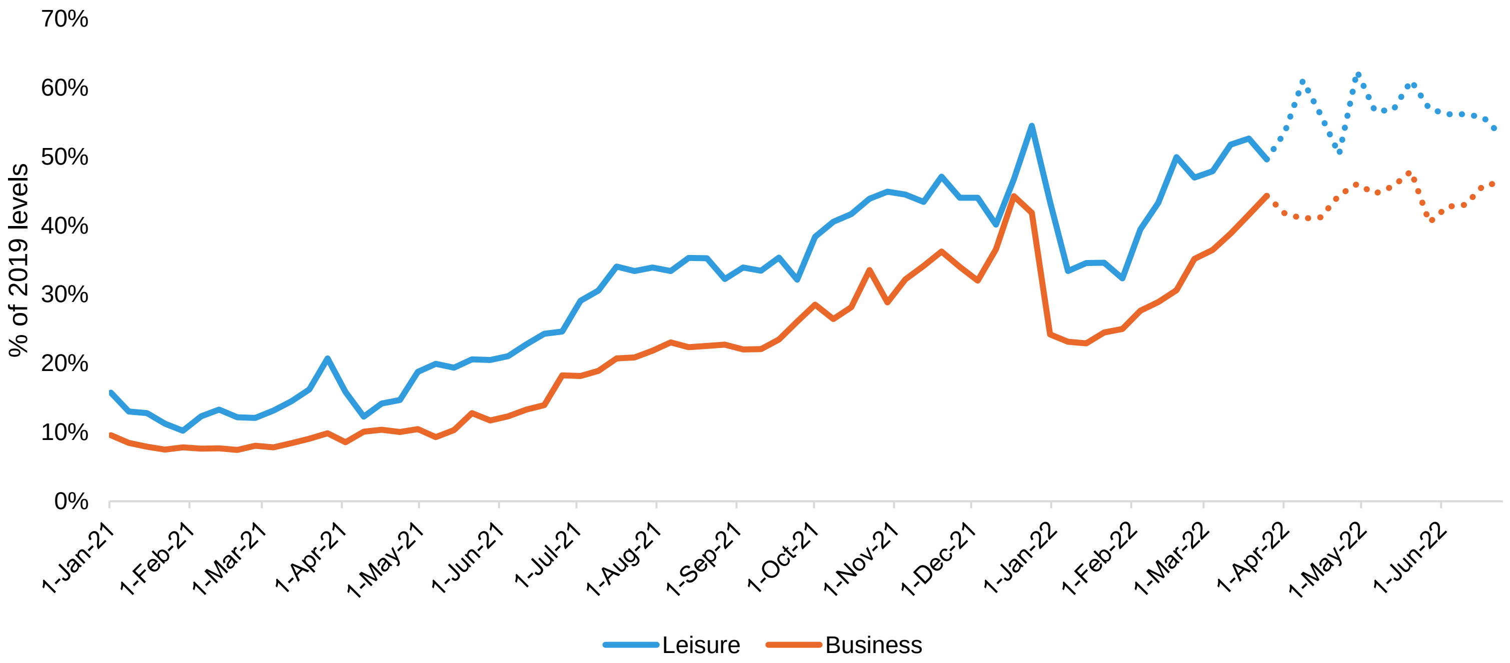
Leisure travel vs. Business travel

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



Source: ForwardKeys Air Ticket Data.

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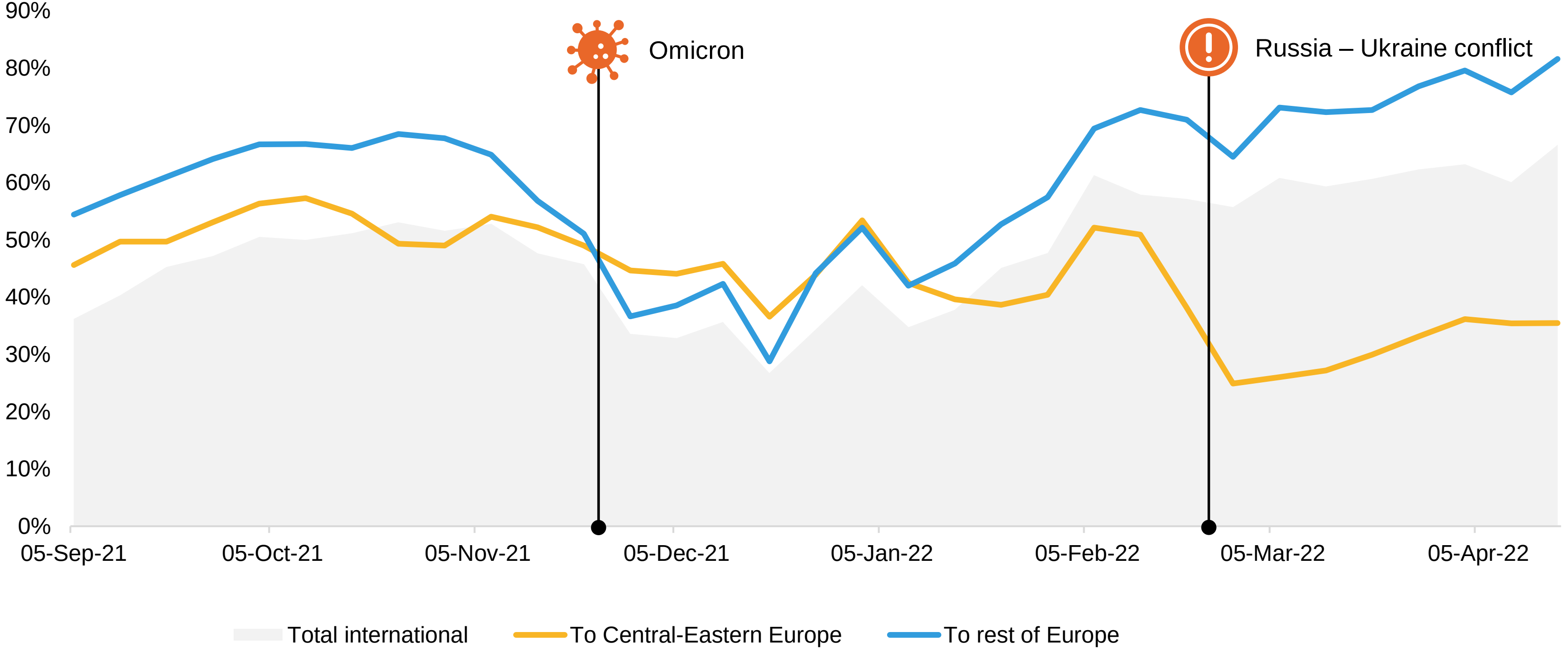
Focus on Europe

The New Normal

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

Worldwide international tickets issued between Sep 2021 and Apr 2022; as of 22 Apr 2022. % of 2019 levels



Source: ForwardKeys Air Ticket Data.

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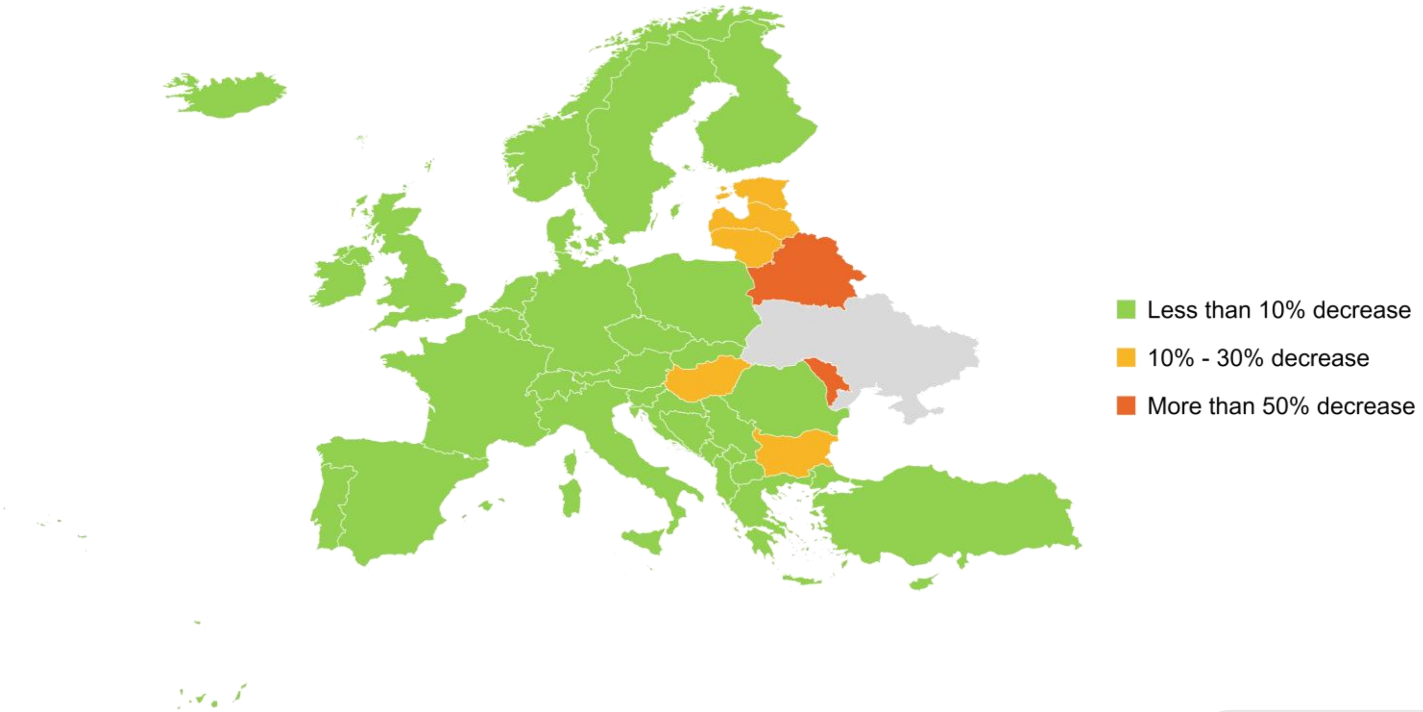
International tickets to Europe after the invasion

International tickets to European destinations issued 4 weeks after the invasion compared to 4 weeks before



Source: ForwardKeys Air Ticket Data.

Bookings for Summer holidays increase

On-the-book arrivals to Intra-European countries for summer holiday with tickets up to 23 Feb 2022 and 23 Apr 2022; var vs. 2019 levels

SUMMER 2022

Var. vs pre-pandemic as of 23 Feb	**Var. vs pre-pandemic** as of 23 April
-27%	**-18%**

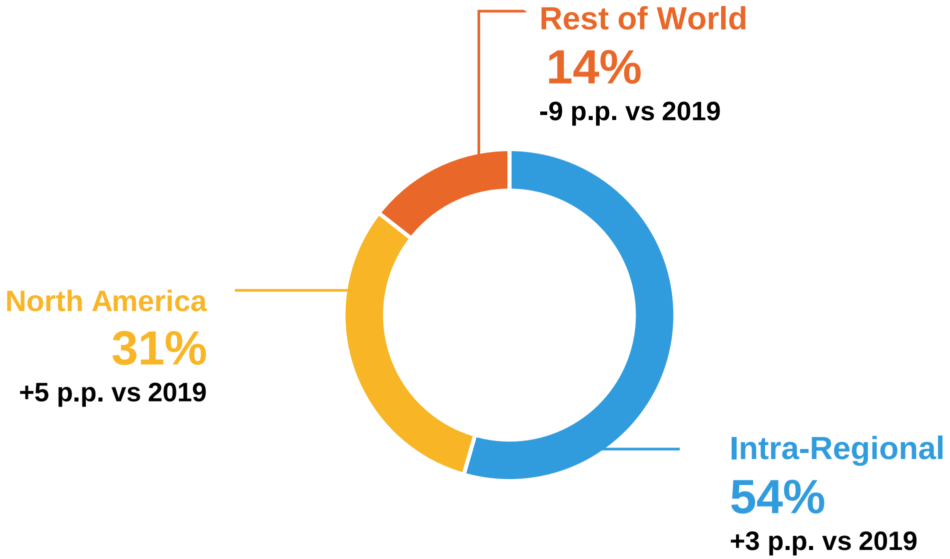
🟧 July-August 2022 vs July-August 2019.

Source: ForwardKeys Air Ticket Data.

Source markets to Europe

On-the-Book International Arrivals into Europe and Greece in Jun-Sep 2022, as of 26 Apr 2022; vs 2019 levels

Biggest markets for arrivals in Europe



Source: ForwardKeys Air Ticket Data.

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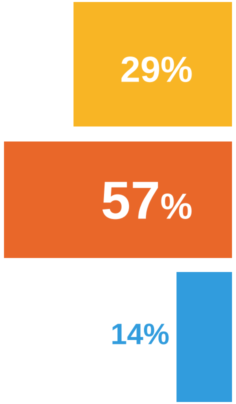
Leisure travel dominates

Booked International arrivals to Europe in Jun-Sep 2022,as of 26 Apr; % of shares.

Length of stay at destination



Long stays
(14+ nights)

Medium stays
(4-13 nights)

Short stays
(1-3 nights)

Number of passengers per booking

Groups	9%
Families	39%
Couples	35%
Singles	17%

Source: ForwardKeys Air Ticket Data.

Airline direct bookings continue growing

Booked International arrivals to Europe from Jun to Sep 2022, as of 20 Apr; % of shares.

Distribution channels

Airline Direct

63%

Reason for travel

VFR + Expats	11%
Group	9%
Leisure	76%
Business	3%

Source: ForwardKeys Air Ticket Data.

Future Outlook

What to expect this summer?

Most active travellers by nationality for summer

Worldwide on-the-book international arrivals in Europe between Jun and Sep 2022, as of 26 Apr; vs same period in 2019

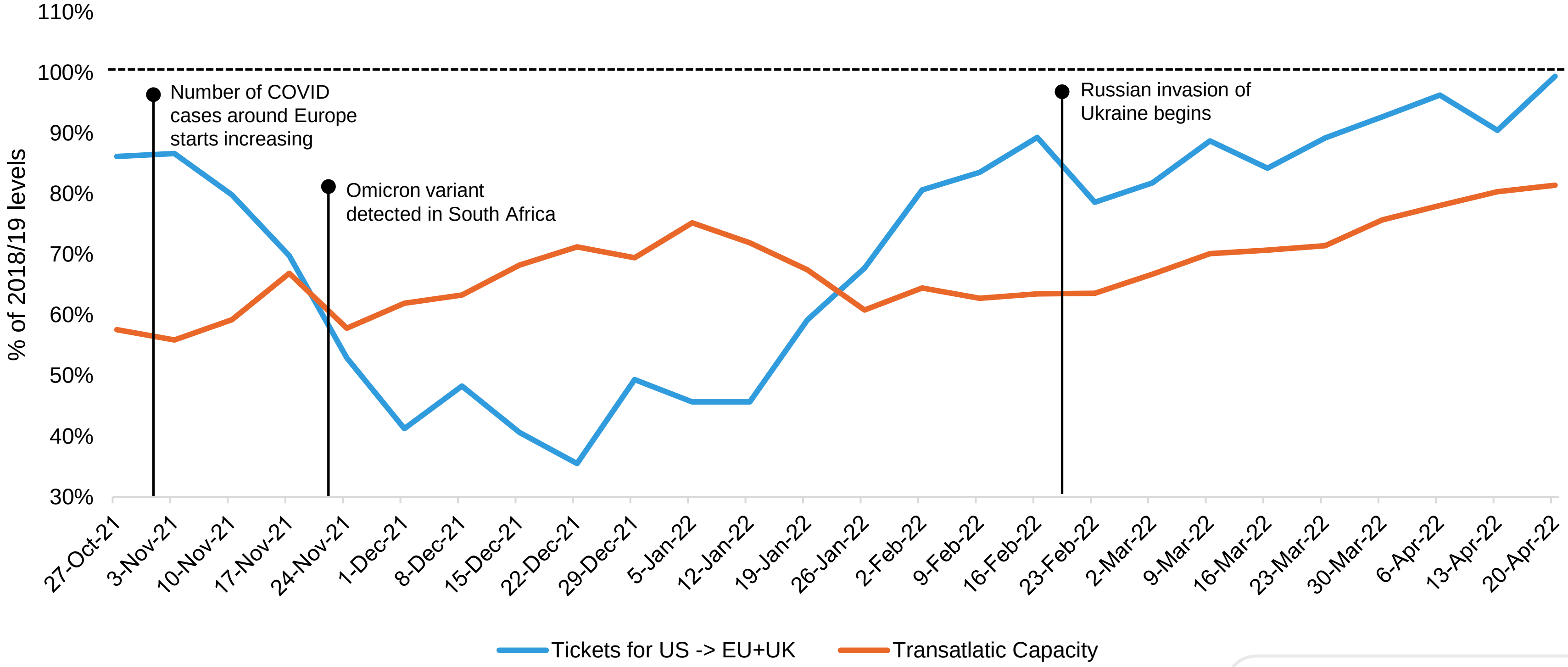
The most resilient origin markets		Var vs 2019
1st	**Israel**	**+135%**
2nd	**Sweden**	**+8%**
3rd	**Denmark**	**+5%**
4th	**United Kingdom**	**+0%**
5th	**Norway**	**-2%**
6th	**U.S.A.**	**-18%**
7th	**Germany**	**-23%**
8th	**Netherlands**	**-25%**
9th	**Canada**	**-29%**
10th	**Finland**	**-31%**

* Origin markets with shares <=1% of total arrivals

Source: ForwardKeys Air Ticket Data.

Demand is driving recovery

Tickets and seat capacity for international arrivals to EU and UK from the US issued between 22 Oct 2021 and 26 Apr 2022; % of 2018/19 levels



Source: ForwardKeys Air Ticket Data & Seat Capacity.

The most resilient European Destinations till April

Worldwide international arrivals in Europe between Jan to Apr 2022, as of 26 Apr; vs same period in 2019

Most resilient destinations		Var vs 2019
1st	Turkey	-22%
2nd	Portugal	-28%
3rd	Norway	-30%
4th	Greece	-30%
5th	Spain	-31%
6th	Switzerland	-44%
7th	France	-44%
8th	Denmark	-45%
9th	Sweden	-45%
10th	Finland	-47%
TOTAL		-48%

* Destinations with shares <=1% of total arrivals

Source: ForwardKeys Air Ticket Data.

The most resilient European destinations this summer

Worldwide on-the-book international arrivals in Europe between Jun and Sep 2022, as of 26 Apr; vs same period in 2019

Most resilient Destinations		YTD Var vs 2019	Summer period Var vs 2019
1st	Greece	-30%	-8%
2nd	Turkey	-22%	-16%
3rd	Portugal	-28%	-18%
4th	Norway	-30%	-24%
5th	Spain	-31%	-25%
6th	France	-44%	-28%
7th	Sweden	-45%	-31%
8th	Denmark	-45%	-35%
9th	Switzerland	-44%	-39%
10th	Finland	-47%	-45%
TOTAL		-48%	-33%

* Destinations with shares <=1% of total arrivals

Source: ForwardKeys Air Ticket Data.

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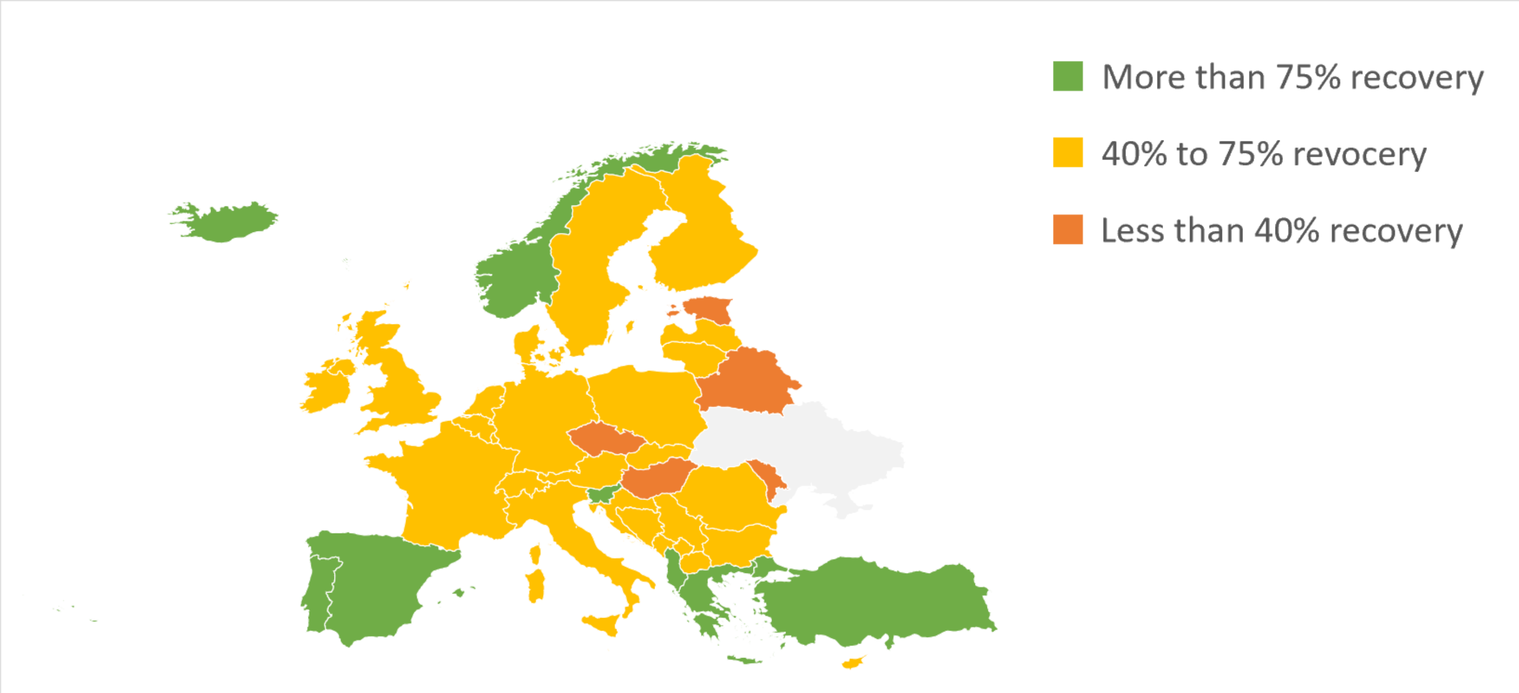
The most resilient European destinations this summer

Worldwide on-the-book international arrivals in Europe between Jun and Sep 2022, as of 26 Apr; vs same period in 2019



Source: ForwardKeys Air Ticket Data.

Take-Aways

1 International travel to Europe continues accelerating and destinations should prepare for a close to pre-pandemic Summer

2 Recovery will be uneven, so expect growth in some markets while others lag behind.

3 Expect the unexpected

4 Data should guide you through this recovery face

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