



ForwardKeys
PREDICTING TRAVELLERS' IMPACT

The imminent return of the Chinese Market

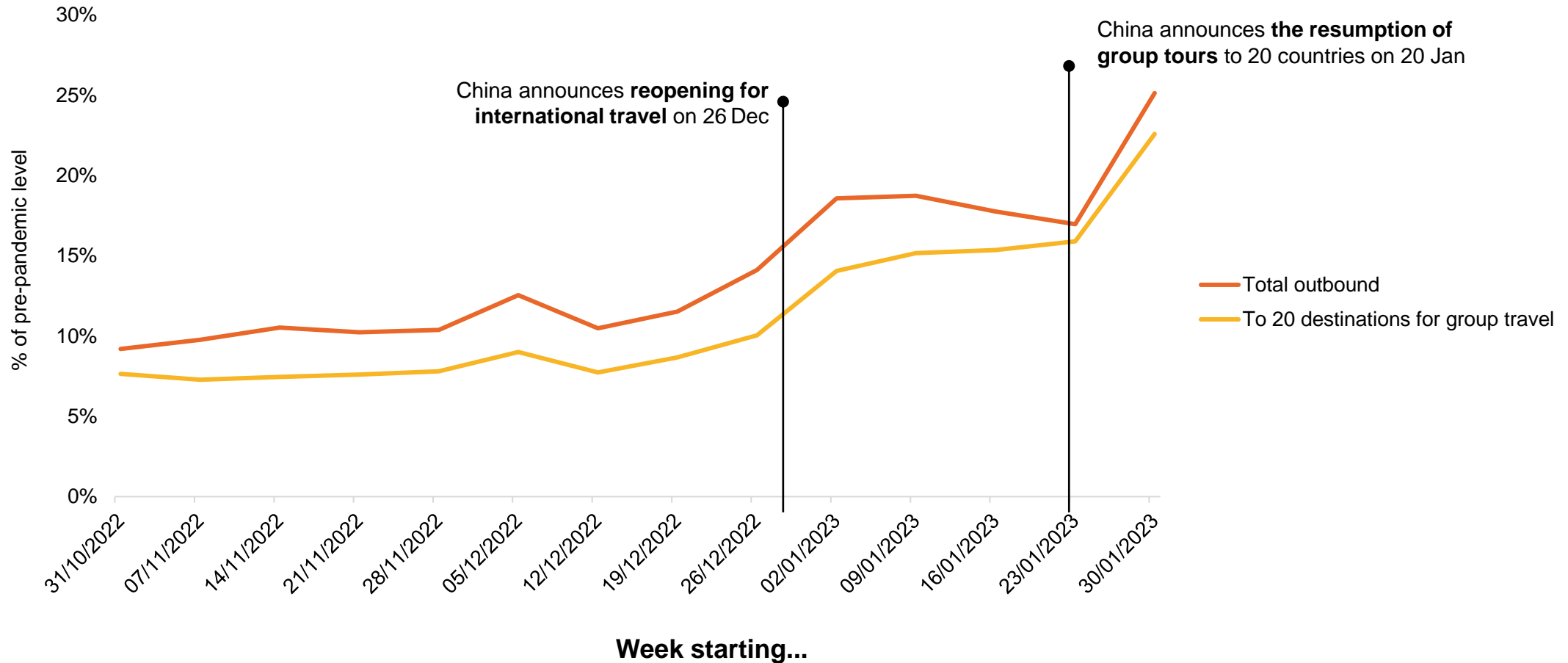
Nancy Dai, China Expert, ForwardKeys

14 Feb 2023

The relaxation of travel restrictions triggered the surge in flight bookings for China outbound travel



Tickets issued up until 5 Feb 2023, for any future outbound China travel; % of pre-pandemic (2018/2019)'s level



20 destinations are: Argentina, Cambodia, Cuba, Egypt, Fiji, Hungary, Indonesia, Kenya, Laos, Malaysia, Maldives, New Zealand, Philippines, Russia, Singapore, South Africa, Sri Lanka, Switzerland, Thailand, U.A.E

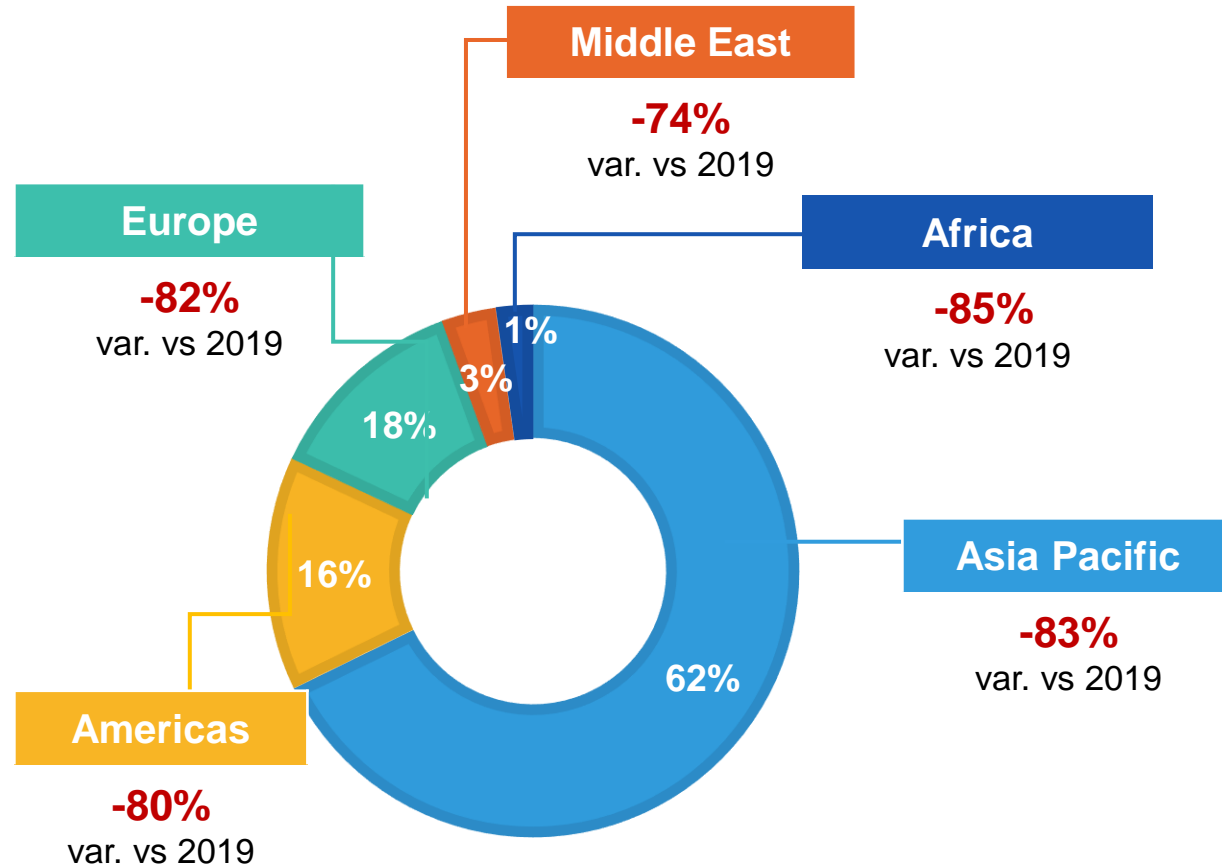
Source: ForwardKeys Air Ticket Data.



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Intra-regional destinations are the most popular for Chinese travellers

Booked international departures from China between March and May 2023, as of 7 Feb 2023; vs 2019 levels



A quick recovery is not expected to major destinations in the next three months

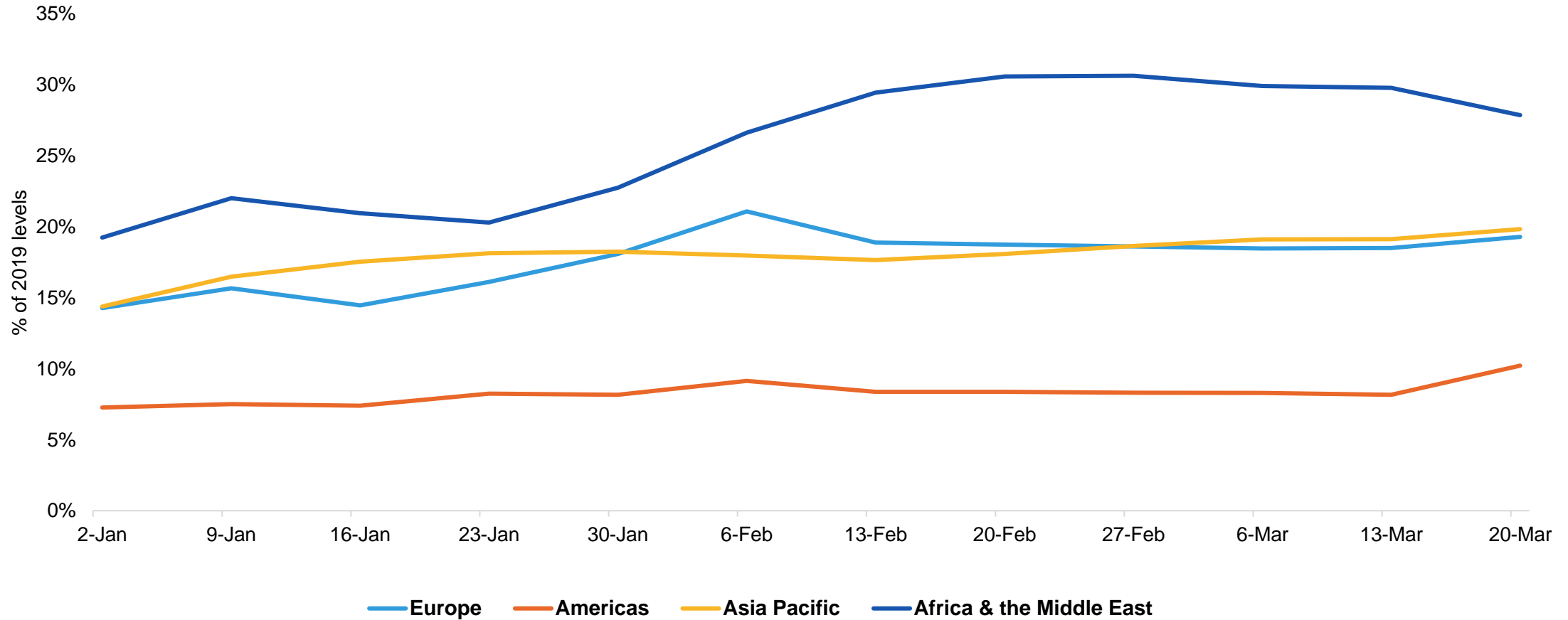
Booked international departures from China between March and May 2023, as of 7 Feb 2023; vs 2019 levels

| Rank | Most resilient destinations in Europe | % of 2019's level |
|------------------|---------------------------------------|-------------------|
| 1 st | United Kingdom | 29% |
| 2 nd | Finland | 28% |
| 3 rd | Germany | 25% |
| 4 th | Sweden | 23% |
| 5 th | Hungary | 20% |
| 6 th | Switzerland | 19% |
| 7 th | France | 18% |
| 8 th | Netherlands | 18% |
| 9 th | Denmark | 16% |
| 10 th | Italy | 15% |
| | TOTAL | 18% |

Source: ForwardKeys Air Ticket Data.

Capacity for international departures remains limited in Q1

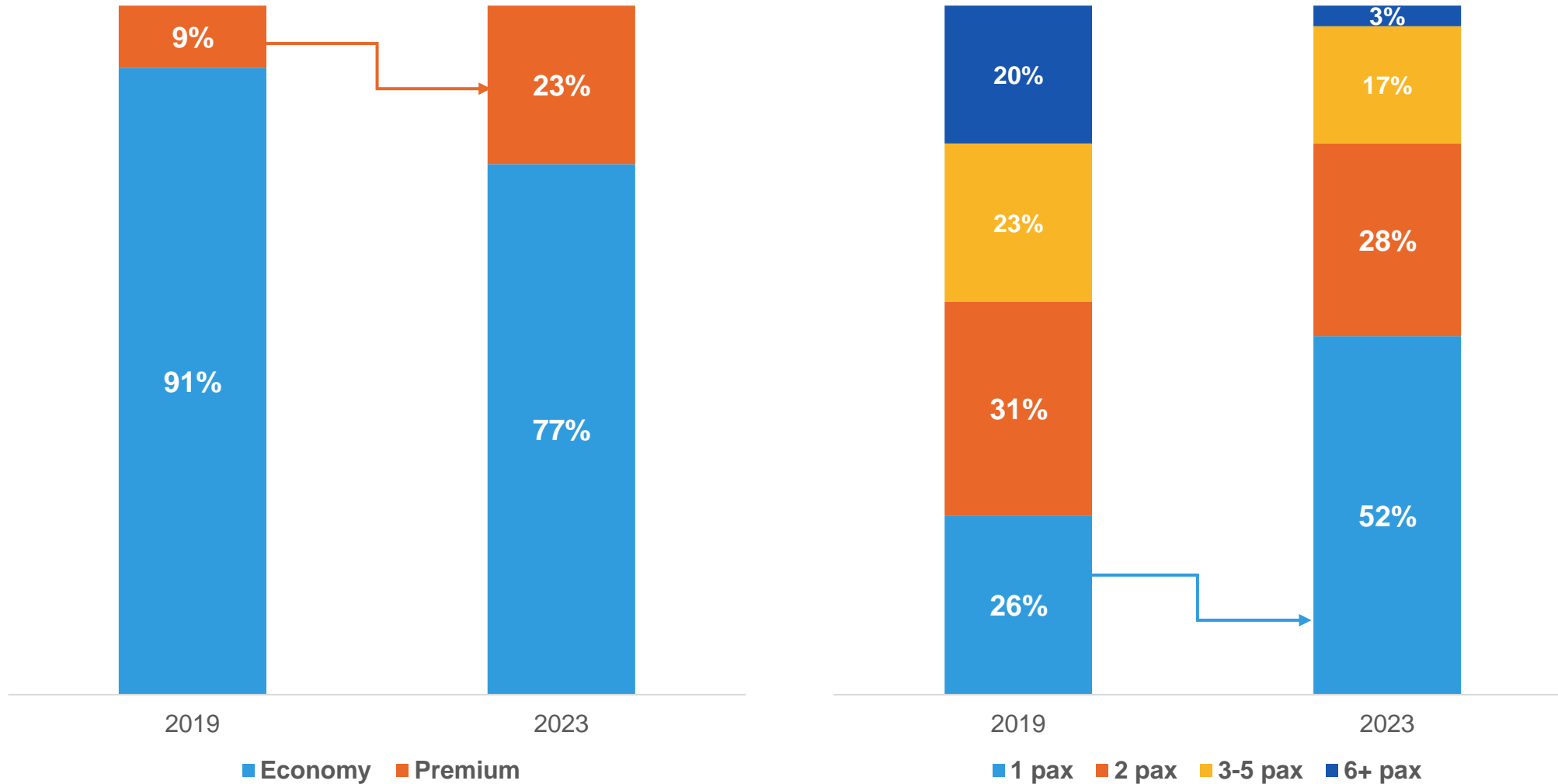
Capacity for international departures from China between 2 Jan and 26 Mar 2023, as of 18 Jan 2023; vs 2019 levels



Source: ForwardKeys Seat Capacity Data.

Booking patterns for China travel to Europe

Bookings for return trip from China to Europe between March and May 2023, as of 7 Feb 2023; vs 2019



China Recovery Tracker

ForwardKeys empowers businesses with real-time data on global travel.

With the most reactive data in market, the best coverage of the Chinese market and local China experts – we can help your business anticipate the next moves of the China market.

Track the recovery pace of Chinese travel each month using ForwardKeys' data.

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Monthly Reports

Ensure that everyone in your organization is aware on the REAL recovery of China outbound with ForwardKeys' China Recovery Tracker.

Receive a monthly report which covers:

- ▶ **Travel demand:** KPIs about the demand evolution and top destinations airports (or cities?) by Region, based on real tickets booked to Hainan, and the Rest of the World.
- ▶ **Travel supply:** As the number of flights from/to China is still limited, this is going to be a determining factor in the recovery of Chinese outbound travel. That's why in the second part of the report we focus on the evolution of scheduled flights and the top destination cities to which China will be connected, thanks to our seat capacity data.
- ▶ **Travel market regulations:** Travel restrictions will make or break the recovery, that's why we'll highlight the key developments in this area (travel restriction changes and travel policy announcements, etc.).

Format: the file is delivered in an easy-to-read PDF format with tables with monthly figures and insights on travel market regulations.

Delivery frequency: monthly



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