

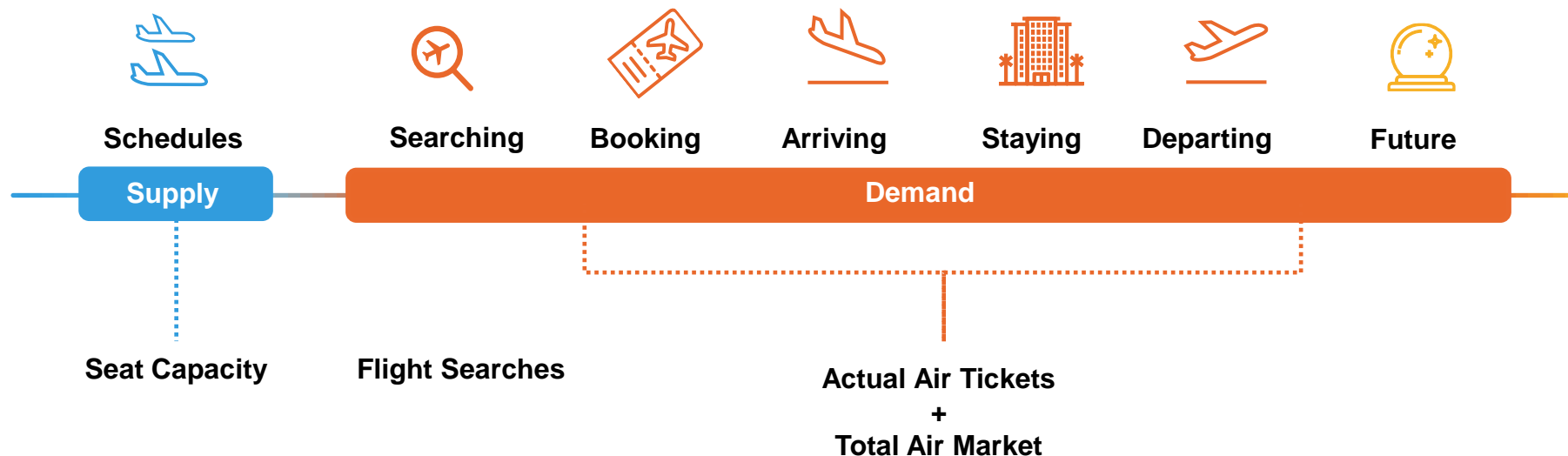


ForwardKeys' Most Popular Cities Report: Will this be the last Super Summer?

Juan A. Gomez, Head of Market Intelligence

June 2023

FORWARDKEYS DATA CAPTURES AND REFLECTS THE ENTIRE TRAVELLER JOURNEY



MOST POPULAR DESTINATIONS Summer 2023



ForwardKeys

Forwardkeys.com
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MOST SEARCHED DESTINATIONS FOR TRAVEL THIS SUMMER

18 out of top 30 are European destinations

Ranking 2023	Difference in ranking position vs 2022	Destination	Ranking 2023	Difference in ranking position vs 2022	Destination
1	+3	Bangkok (TH)	16	-3	Copenhagen (DK)
2	-1	Paris (FR)	17	-3	Los Angeles (US)
3	=0	London (GB)	18	-2	Rome (IT)
4	+6	Denpasar Bali (ID)	19	+8	Manila (PH)
5	-3	Barcelona (ES)	20	-1	Frankfurt (DE)
6	+2	New York (US)	21	-1	Dubai (AE)
7	-1	Lisbon (PT)	22	-4	Malaga (ES)
8	-3	Istanbul (TR)	23	+1	Milan (IT)
9	-2	Madrid (ES)	24	-9	Cancun (MX)
10	+1	Athens (GR)	25	+3	Dublin (IE)
11	-2	Palma Mallorca (ES)	26	-9	Antalya (TR)
12	+14	Singapore (SG)	27	-4	Berlin (DE)
13	+53	Tokyo (JP)	28	+4	Vienna (AT)
14	+24	Kuala Lumpur (MY)	29	-8	Miami (US)
15	-3	Amsterdam (NL)	30	-1	San Francisco (US)

- Europe
- Americas
- Asia Pacific
- Africa & Middle East

Source: ForwardKeys Flight Search Data

URBAN DESTINATIONS IN EUROPE CLIMB-UP THE RANKINGS

Top 30 European destinations

Ranking 2023	Difference in ranking position vs 2022	Destination
2	-1	Paris (FR)
3	=0	London (GB)
5	-3	Barcelona (ES)
7	-1	Lisbon (PT)
8	-3	Istanbul (TR)
9	-2	Madrid (ES)
10	+1	Athens (GR)
11	-2	Palma Mallorca (ES)
15	-3	Amsterdam (NL)
16	-3	Copenhagen (DK)
18	-2	Rome (IT)
20	-1	Frankfurt (DE)
22	-4	Malaga (ES)
23	+1	Milan (IT)
25	+3	Dublin (IE)

Ranking 2023	Difference in ranking position vs 2022	Destination
26	-9	Antalya (TR)
27	-4	Berlin (DE)
28	+4	Vienna (AT)
31	-6	Porto (PT)
34	-12	Heraklion (GR)
36	-3	Alicante (ES)
37	-6	Ibiza (ES)
38	+1	Munich (DE)
40	+20	Tirana (AL)
41	+1	Budapest (HU)
42	+4	Brussels (BE)
43	-6	Faro (PT)
44	+1	Zurich (CH)
45	-5	Naples (IT)
46	-11	Split (HR)

Source: ForwardKeys Flight Search Data

EMERGING DESTINATIONS SPEEDING UPWARDS

Top ranking climbers amongst the most searched destinations for summer 2023

Difference in ranking position vs 2022	Ranking 2023	Destination
+161	56	Taipei (TW)
+129	39	Hong Kong (HK)
+56	35	Seoul (KR)
+53	13	Tokyo (JP)
+41	76	Hanoi (VN)
+41	103	Auckland (NZ)
+31	75	Melbourne (AU)
+30	52	Ho Chi Minh City (VN)
+24	14	Kuala Lumpur (MY)
+24	57	Phuket (TH)
+24	77	Jakarta (ID)
+23	105	Las Vegas (US)
+21	32	Sydney (AU)
+20	40	Tirana (AL)
+15	84	Funchal (PT)

 Source: ForwardKeys Flight Search Data

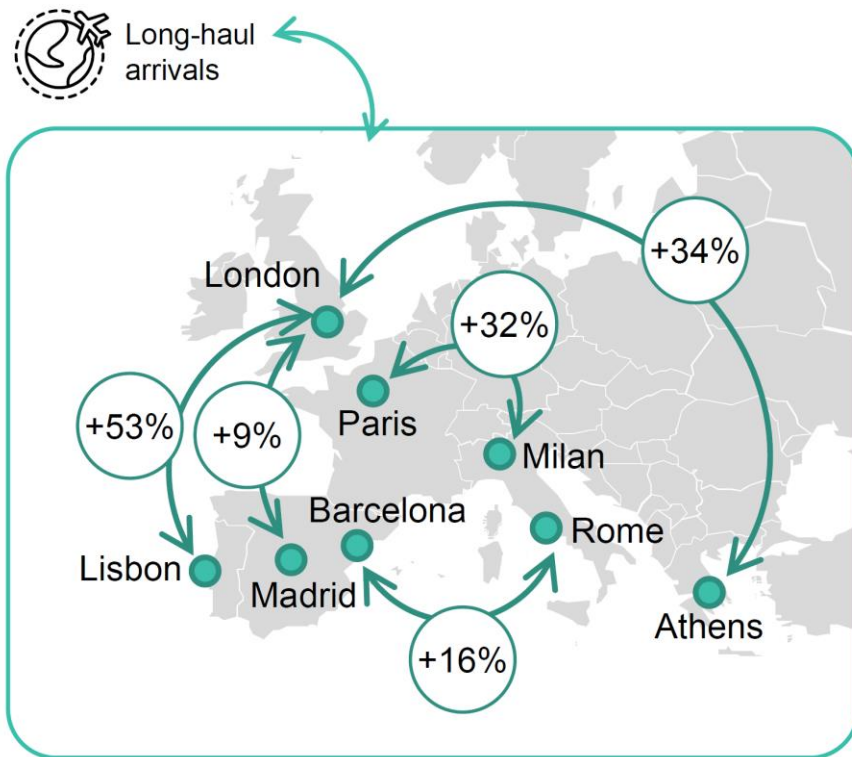
EUROPEAN DESTINATIONS FACE MORE LONG-HAUL COMPETITION

Most searched destinations for long-haul travel in summer 2023

	Ranking 2023	Difference in ranking position vs 2022	Destination
	1	=0	Bangkok (TH)
	2	=0	New York (US)
	3	=0	Denpasar Bali (ID)
	4	+1	Paris (FR)
	5	-1	Los Angeles (US)
	6	+1	London (GB)
	7	+1	Dubai (AE)
	8	+17	Tokyo (JP)
	9	-3	Madrid (ES)
	10	-1	San Francisco (US)

LONDON REMAINS EUROPE'S GATEWAY FOR MULTI-DESTINATION TRIPS

Fastest growing multi-destination itineraries in Europe: Forward tickets for long-haul arrivals in Europe, summer 2023, vs 2019

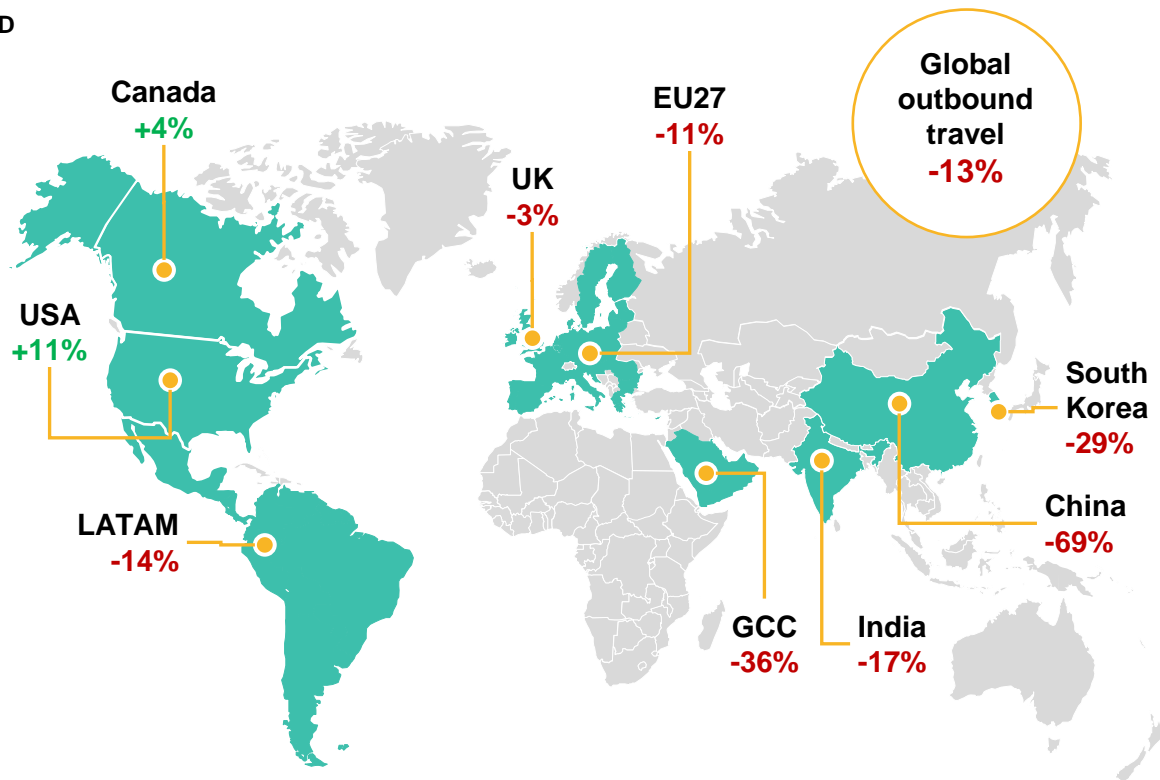


Source: ForwardKeys Actual Air Tickets Data

CANADA AND THE US LEAD TRAVEL DEMAND — SURPASSING 2019

On the book tickets for international departures in Summer 2023, vs 2019 levels

OUTBOUND TRAVEL

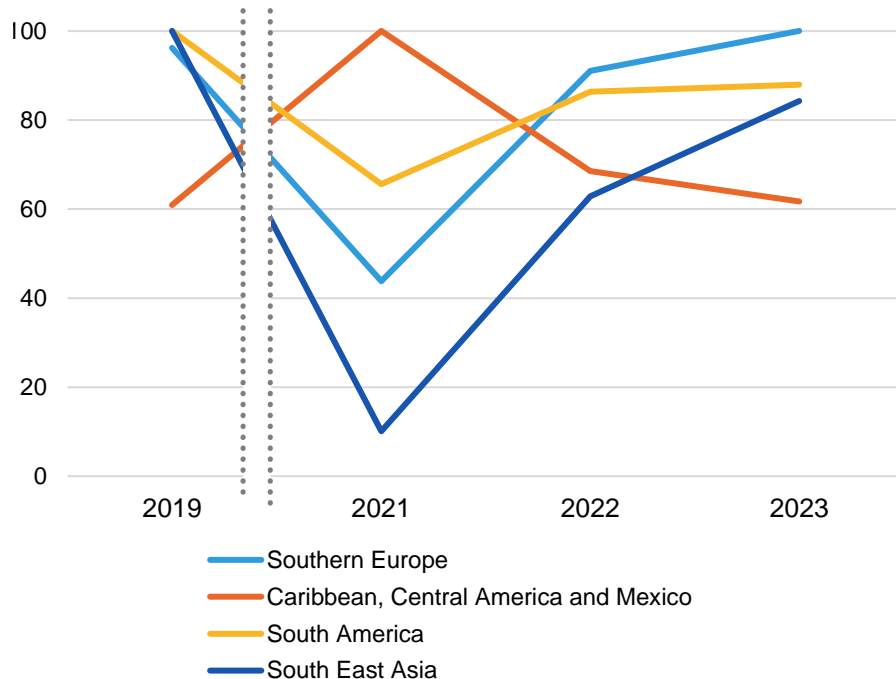


Source: ForwardKeys Actual Air Tickets Data

SOUTHERN EUROPE ATTRACTS MORE AMERICAN VISITORS

US & Canada: Evolution of demand for popular leisure destinations (indexed), summer 2019 to 2023 (forward tickets)

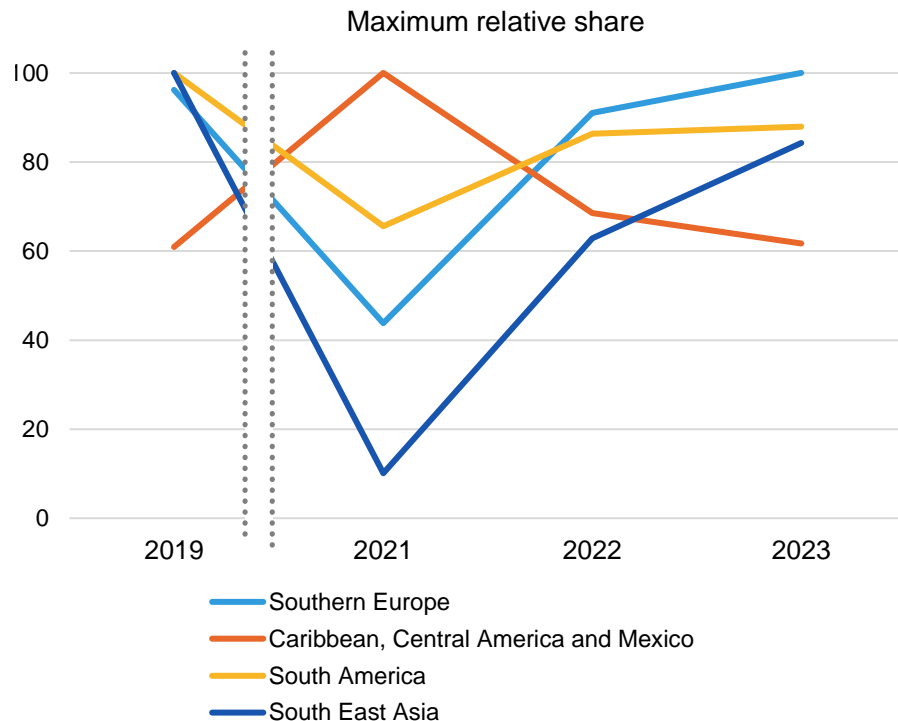
Maximum relative share



Source: ForwardKeys Actual Air Tickets Data

SOUTHERN EUROPE ATTRACTS MORE AMERICAN VISITORS

US & Canada: Evolution of demand for popular leisure destinations (indexed), summer 2019 to 2023 (forward tickets)

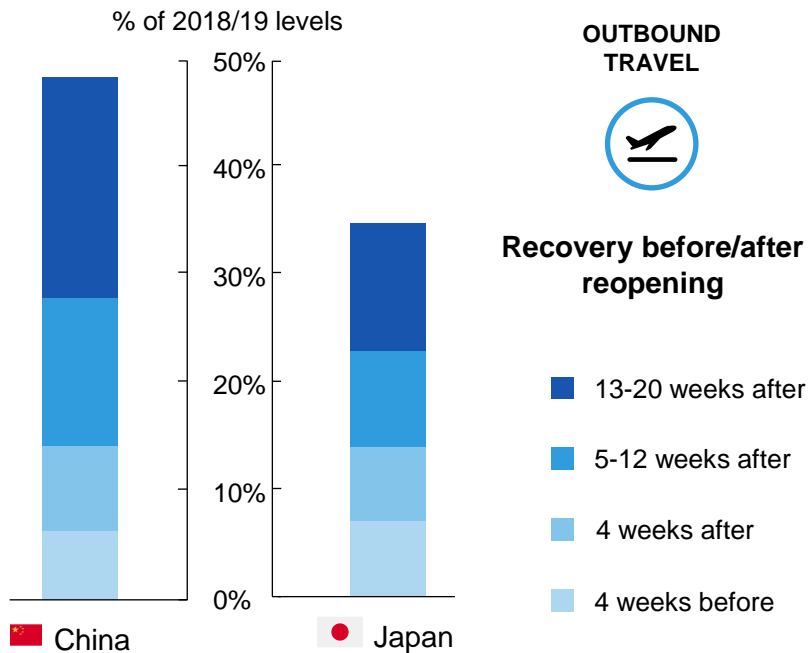


Most resilient destinations in Southern Europe	Var vs 2019
Albania	+57%
Greece	+51%
Turkey	+45%
Portugal	+36%
Croatia	+35%
TOTAL USA TO SOUTHERN EUROPE	+27%

Source: ForwardKeys Actual Air Tickets Data

CHINA'S OUTBOUND TRAVEL RECOVERY OUTPACES JAPAN

Intl. departures from China and Japan in weeks before and after removing the COVID-19 related travel restrictions, vs 2018/2019

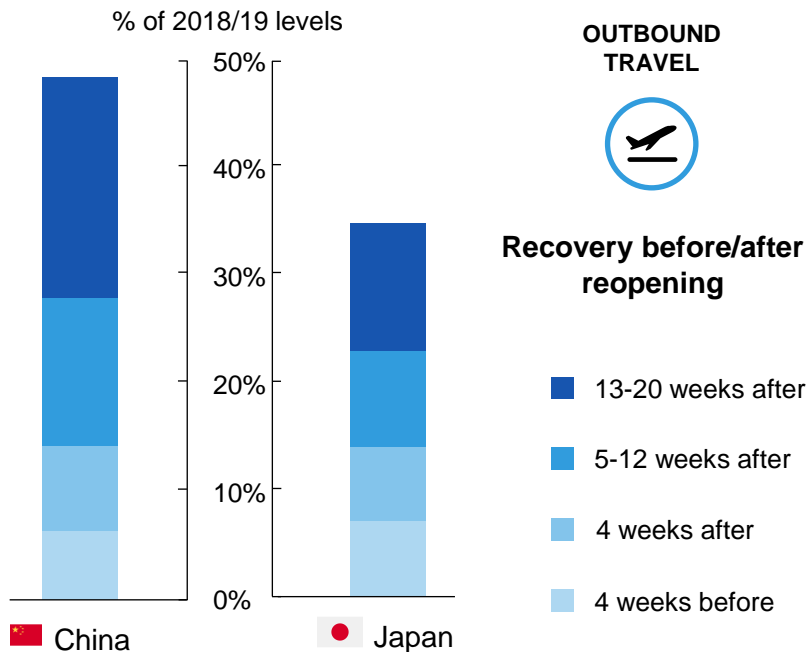


Tickets departing from...



Source: ForwardKeys Actual Air Tickets Data

CHINA'S OUTBOUND TRAVEL RECOVERY OUTPACES JAPAN

Intl. departures from China and Japan in weeks before and after removing the COVID-19 related travel restrictions, vs 2018/2019




Tickets departing from...

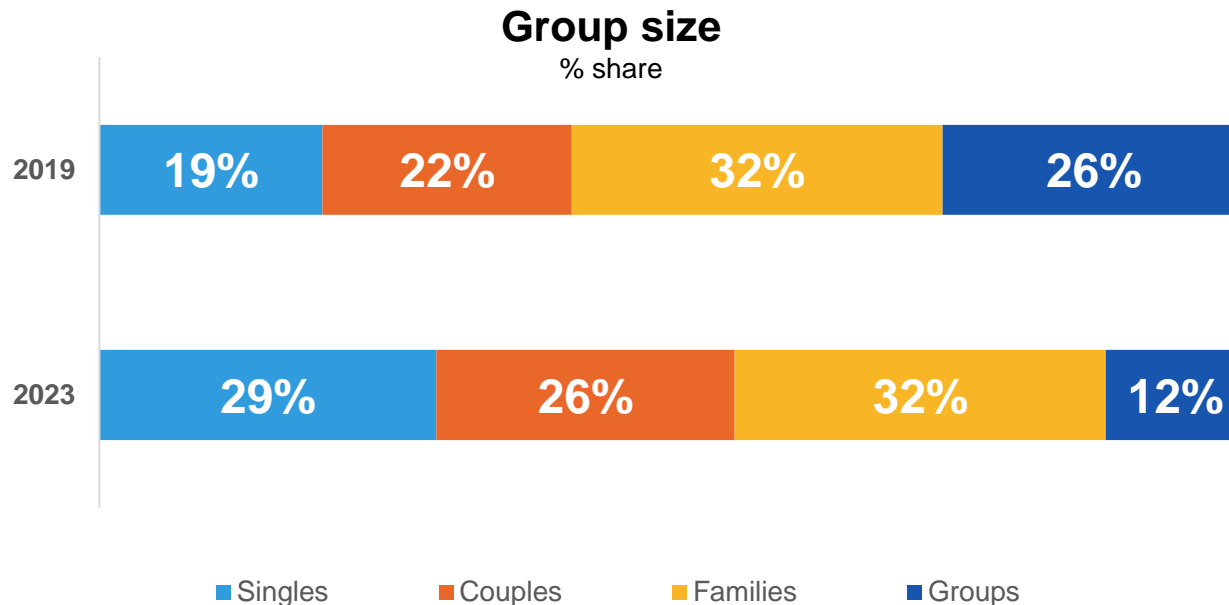
Most resilient destinations in Europe	Var vs 2019
Netherlands	-36%
France	-50%
Greece	-54%
United Kingdom	-55%
Italy	-62%
TOTAL	-63%

**considering destinations with share > 2%*

 Source: ForwardKeys Actual Air Tickets Data

CHINA'S TRAVELLER PROFILE SHIFTS IN FAVOUR OF FIT TRAVEL

International arrivals in Europe from China in summer 2023, as of 14 June 2023; vs 2019

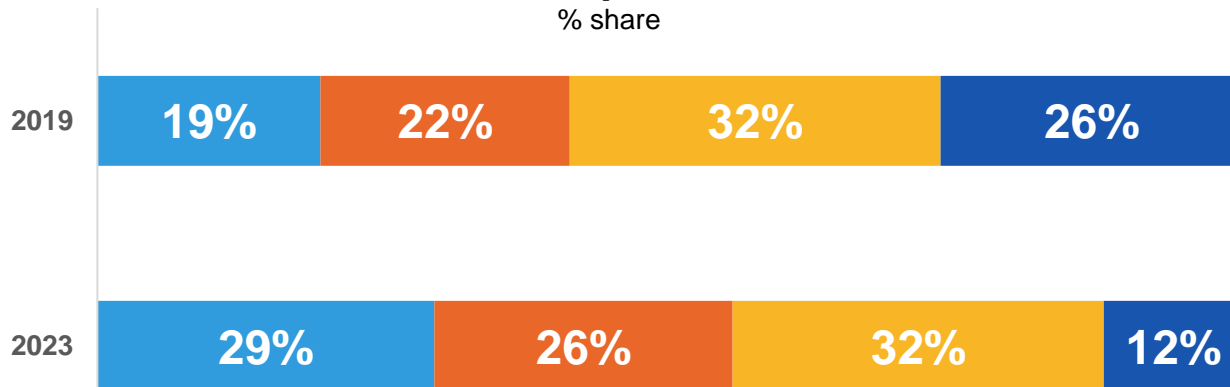


CHINA'S TRAVELLER PROFILE SHIFTS IN FAVOUR OF FIT TRAVEL

International arrivals in Europe from China in summer 2023, as of 14 June 2023; vs 2019

Group size

% share



Difference in share vs 2019:

+10p.p.

+4p.p.

-14p.p.

■ Singles

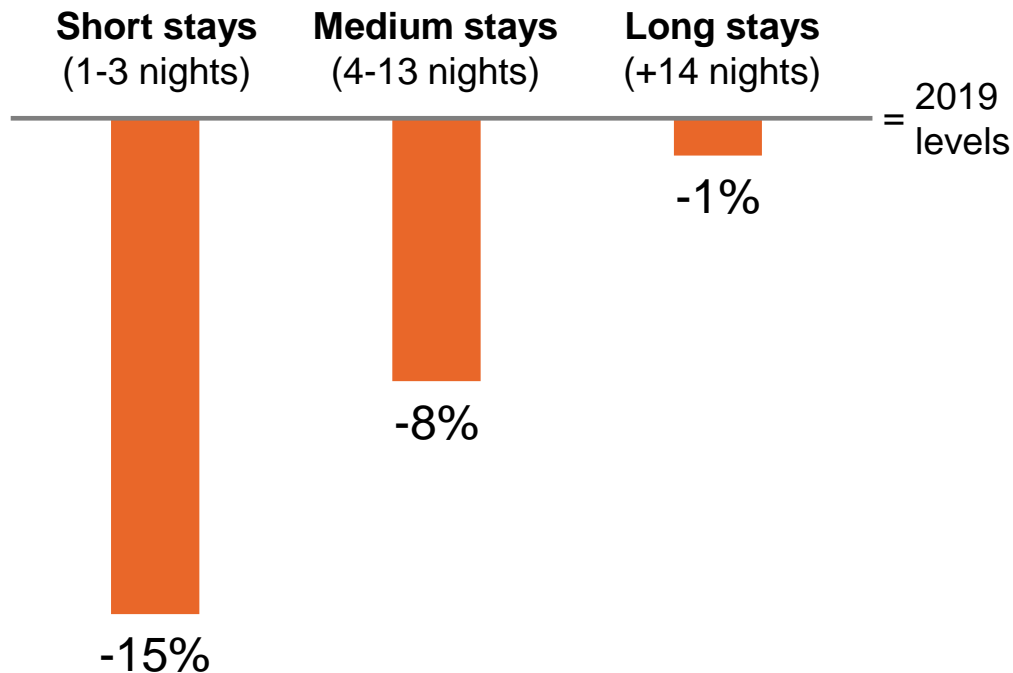
■ Couples

■ Families

■ Groups

EUROPE OUTBOUND: TRAVELLERS ENJOY LONGER TRIPS

Duration of the stay: Forward tickets for international departures from European countries* in summer 2023, vs 2019

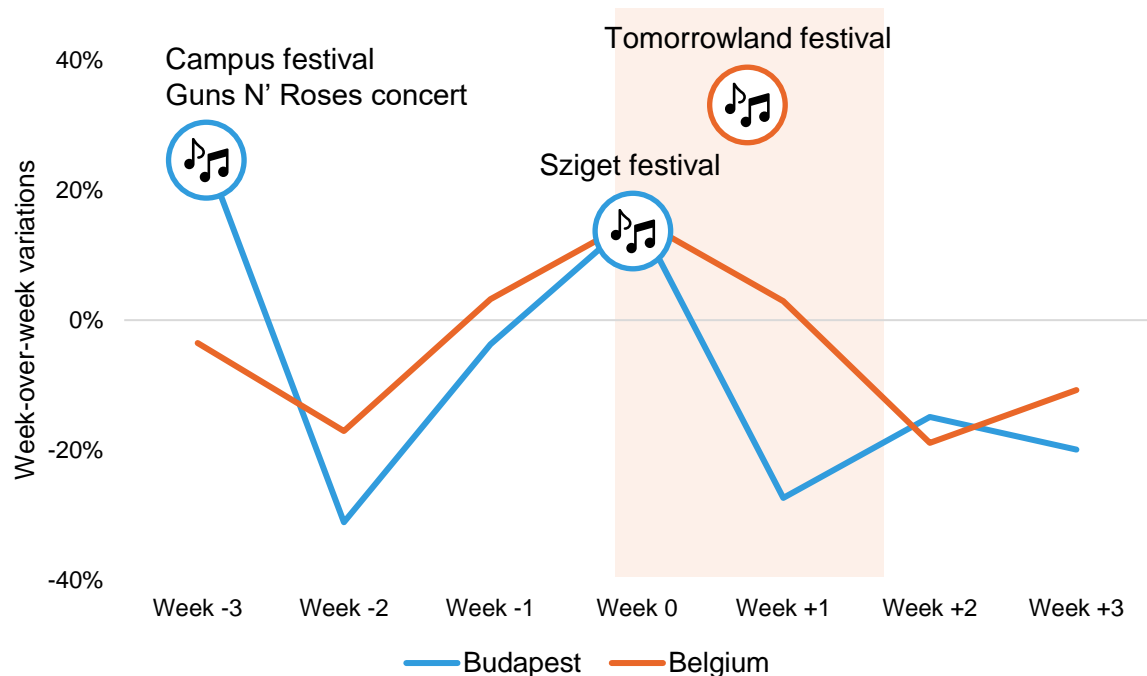


*excl. Russia, Belarus and Ukraine

Source: ForwardKeys Actual Air Tickets Data

EVENTS ARE A CATALYST FOR VISITOR LOYALTY

Flight searches for international arrivals in Budapest and Belgium in the weeks around music festivals; week-over-week variation



Sziget festival takes place in Budapest (Hungary) between 10 and 15 August 2023

Tomorrowland festival takes place in Boom (Belgium) between 21 and 30 July 2023

Source: ForwardKeys Flight Search Data



ForwardKeys

INTRODUCING DESTINATION GATEWAY NEW EVENTS MODULE

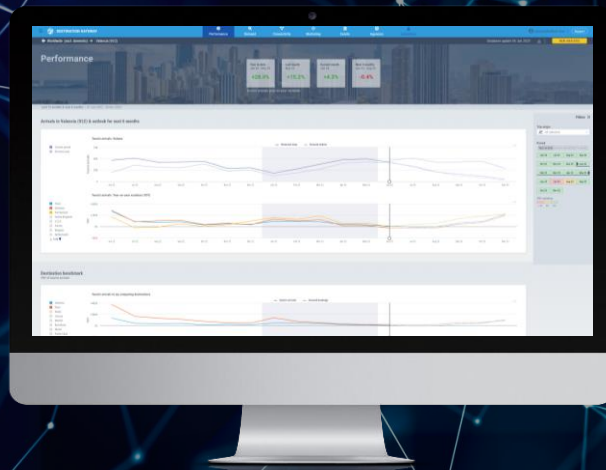
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DESTINATION GATEWAY MODULES



DESTINATION GATEWAY MODULES

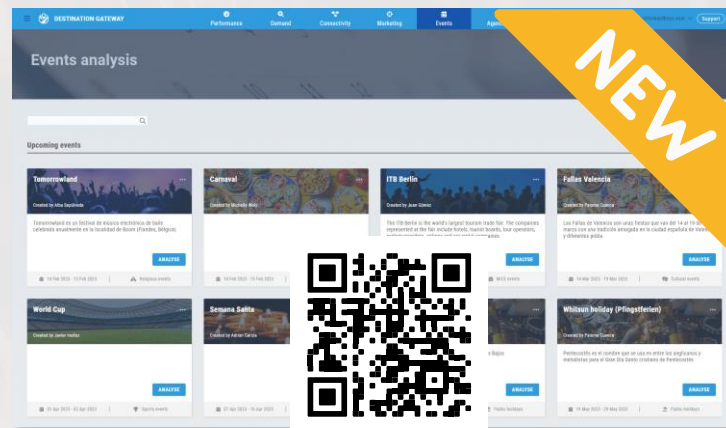


DISCOVER HOW EVENTS IMPACT YOUR DESTINATION

NEW EVENTS MODULE

- **Event performance tracking**
Monitor the success of your MICE, entertainment or sports events.
- **Anticipate the demand**
Find markets with intention to travel and track the booking pace for future events.
- **Define competitive advantage**
Capture your market share driven by holiday periods in your key source markets.

FORWARDKEYS' DATA SOLUTION FOR DMOS



KNOW MORE!

Take-Aways

1

Tourist demand broadens beyond sun and beach destinations

Take- Aways

2 Take advantage of the strength of key markets while others remain in recovery mode

Take-Aways

3 Taking smart data-based decisions for your destinations and businesses is more critical than ever

Departures Salidas				Departures Salidas			
Flight Vuelo	Destination Destino	Gate Puerta	Boarding Time / Remarks Hora de Embarque / Observaciones	Flight Vuelo	Destination Destino	Gate Puerta	Boarding Time / Remarks Hora de Embarque / Observaciones
EZY 8536	LONDON GAT	7	11:45	U6 3015	BARCELONA		13:05
JAF 6104	BRUSELAS		12:00	U6 3013	BARCELONA		13:05
ST 8985	BREMEN	11	12:10	LS 522	NEWCASTLE		13:10
X3 2175	STUTTGART	17	12:10	U6 3011	BARCELONA		13:20
NT 207	G. CANARIA		12:15	IBE 3907	MADRID		13:20
X3 2177	KARLSRUHE	15	12:15	U6 3009	BARCELONA		13:25
AB 2139	DUSSELDORF		12:25	DE 1457	DUSSELDORF		13:25
FR 5469	MADRID		12:45	NT 417	TENERIFE N		13:35
ST 3701	DUSSELDORF		12:45	DE 1461	LEIPZIG		13:35
DE 1413	MUENCHEN	19	12:55	DE 1441	HAMBURG		13:35



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