Impact of COVID-19 crisis on inbound air travel to the Middle East

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ForwardKeys
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Year to date arrivals have halved compared to the same time last year.

Year to date arrivals to world regions *
01 January to 03 May 2020; Year-on-Year variations by region

Americas
YoY Var: -47.4%

Europe
YoY Var: -57.6%

Africa
YoY Var: -46.0%

Middle East
YoY Var: -51.5%

Asia Pacific
YoY Var: -62.5%

Total Inbound
YoY Var: -56.7%

* excluding domestic

Arrivals from 01 January to 03 May 2020 vs same period in 2019.
Only considered pax staying 1 to 21 nights at destinations.
Source: ForwardKeys Air Reservation Data.
Future travel bookings to the Middle East plummet -76.6% from January

Bookings made for International travel to the Middle East by departure region
06 January to 03 May, Year-on-Year variations

- Asia Pacific: -81.2%
- Europe: -81.5%
- Americas: -84.9%
- Africa: -70.8%
- Middle East: -69.7%
- Total Global: -76.6%

*Bookings made from 06 January to 03 May

Introduction of travel restrictions in China
Lombardy COVID-19 outbreak

Source: ForwardKeys Air Reservation Data.
Air capacity is a fraction of what it was as compared to the same time last year

Seat Capacity evolution for Worldwide travel from January 2020 Year to date vs the same period in 2019

**The air capacity seats are reported as per the data parameters listed above. They may differ due to the quick changing developments within the aviation sector, including unreported or unfiled seat numbers by airline operators.**
Transits via Middle Eastern mega hubs has come to a halt

Year on Year variation for Passengers transiting through major Middle Eastern hubs
06 January to 03 May, Year-on-Year variations

Year to date* YoY % change

- Dubai -50.6%
- Doha -48.6%
- Abu Dhabi -43.2%
- Total -48.6%

*Bookings made from 06 January to 03 May

Booking made from 6 January to 03 May 2020 vs same period in 2019 for future travel at any time.

Only considered pax staying 1 to 21 nights at destinations.

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The state of travel restrictions in the Middle East

Source: IATA Timatic and other government, news and airport sources. Data as per 7 May 2020.

- Flight suspension
- Partial border closure
- Complete border closure
The Future Outlook
Most bookings for the Summer are made in May - July

Long haul flight bookings to the Middle East for travel in June, July and August

Bookings made from 1 June 2019 to 30 April 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.
### Top 5 Middle East inbound destination countries for long-haul travellers** – June, July & August 2020

<table>
<thead>
<tr>
<th>Country</th>
<th>YoY % var</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Arab Emirates</td>
<td>-67.1%</td>
<td>53%</td>
</tr>
<tr>
<td>Qatar</td>
<td>-54.6%</td>
<td>14%</td>
</tr>
<tr>
<td>Egypt</td>
<td>-62.7%</td>
<td>13%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>-66.8%</td>
<td>12%</td>
</tr>
<tr>
<td>Jordan</td>
<td>-71.4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Northern Hemisphere Summer
**Excludes Inter-Middle Eastern travel

Bookings confirmed as 04 May 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.
Most Bookings for Q4 are made in October and November

Long haul flight bookings to the Middle East for travel in October, November and December

- More cancellations than bookings

Bookings made from 1 October 2019 to 30 April 2020 vs same period last year, for travel in October – December 2020 vs travel in October – December 2019.

Only considered pax staying 1 to 21 nights at destinations.

Source: ForwardKeys Air Reservation Data.
There is still some desire for travel to the Middle East

Breakdown of flight searches for International travel to the Middle East, performed in April for a departure in…

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

Only considered pax staying 1 to 21 nights at destinations.

Source: ForwardKeys Flight Search data.
## Changes in key source markets

### Top 5 Rankings for Origin markets with the highest search shares for trips to Middle East, 2019 vs. 2020

<table>
<thead>
<tr>
<th>Trip Origin</th>
<th>% Share of searches for 2019</th>
<th>Trip Origin</th>
<th>% Share of searches for 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>13%</td>
<td>United Kingdom</td>
<td>24%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>11%</td>
<td>Germany</td>
<td>7%</td>
</tr>
<tr>
<td>Italy</td>
<td>6%</td>
<td>U.S.A.</td>
<td>6%</td>
</tr>
<tr>
<td>France</td>
<td>6%</td>
<td>Italy</td>
<td>6%</td>
</tr>
<tr>
<td>Germany</td>
<td>5%</td>
<td>France</td>
<td>4%</td>
</tr>
</tbody>
</table>

Flight searches from 1 to 31 April 2020 vs same period in 2019. Only considered pax staying 1 to 21 nights at destinations. Source: ForwardKeys Flight Search data.
The United Kingdom’s appetite for travel persists, despite being in quarantine!

Breakdown of flight searches from the United Kingdom to the Middle East performed in April for a departure in…

Flight searches from 1 to 30 April 2020 vs same period in 2019. Only considered pax staying 1 to 21 nights at destinations.

Source: ForwardKeys Flight Search data.
It is time to be data-driven
GET IN CONTACT!

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