Impact of COVID-19 crisis on inbound air travel to APAC

Jameson Wong, ForwardKeys

May 7, 2020
ForwardKeys has data that captures and reflects the entire traveller journey.
Year to date international arrivals to world regions *
1 January to 3 May April 2020; Year-on-Year variations by region

**Americas**
YoY Var: -46.5%

**Europe**
YoY Var: -56.7%

**Asia Pacific**
YoY Var: -62.0%

**Africa & Middle East**
YoY Var: -48.9%

**Total Inbound**
YoY Var: -55.3%

*excluding domestic*

Arrivals from 1 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.
Dependence on the Chinese source market now evident

Year to date international arrivals to Asian regions*
1 January to 3 May 2020; Market shares by region and Year-on-Year variations

- Southeast Asia
  - YoY Var: -54.8%
  - Share: 43%

- South Asia
  - YoY Var: -47.3%
  - Share: 14%

- Northeast Asia
  - YoY Var: -74.2%
  - Share: 31%

- Oceania
  - YoY Var: -46.2%
  - Share: 12%

* excluding domestic

Arrivals from 1 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.
New bookings to Asia overshadowed by high cancellations

Bookings made for International travel to Asia by departure region
6 January to 3 May 2020, Year on Year variations

YTD Bookings*
YoY % change

Asia Pacific -102.5%
Europe -97.7%
Americas -104.5%
Africa & Middle East -80.2%
Total Global -101.1%

*Bookings made from 06 January to 03 May

Introduction of travel restrictions in China
Lombardy COVID-19 outbreak

More cancellations than new bookings

Booking made from 06 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. Source: ForwardKeys air reservation data.
The current state of travel restrictions in APAC

Source: IATA Timatic and other government, news and airport sources. Data as per 6 May 2020.
The downward decline of Air Capacity continues

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.**

Source: ForwardKeys & CIRIUM
Chinese domestic air travel and ticket sales recovers slowly

China domestic air tickets transacted

China domestic air arrivals actualised

- Jan-20
- Feb-20
- Mar-20
- Apr-20

Jan-20
Feb-20
Mar-20
Apr-20

Millares

2019 2020

Travel dates from 1 January to 29 April 2020 vs same dates previous year. Considered pax staying more than 1 night at destinations. Source: ForwardKeys Actual Air Tickets data.
Top 10 APAC long-haul destinations outlook for the Summer

<table>
<thead>
<tr>
<th>Destination</th>
<th>YoY % var</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thailand</td>
<td>-63.4%</td>
<td>15.6%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>-46.6%</td>
<td>13.4%</td>
</tr>
<tr>
<td>Japan</td>
<td>-59.2%</td>
<td>13.1%</td>
</tr>
<tr>
<td>Australia</td>
<td>-63.8%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Singapore</td>
<td>-50.8%</td>
<td>6.8%</td>
</tr>
<tr>
<td>India</td>
<td>-71.7%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>-66.6%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Maldives</td>
<td>-44.5%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Philippines</td>
<td>-61.2%</td>
<td>4.5%</td>
</tr>
<tr>
<td>China</td>
<td>-87.7%</td>
<td>3.5%</td>
</tr>
</tbody>
</table>

*Excludes Inter-APAC travel

Bookings confirmed as 3 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.
### Top 10 APAC destination countries for international travellers* – June, July & August 2020

<table>
<thead>
<tr>
<th>Country</th>
<th>YoY % var</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>-75.1%</td>
<td>18.3%</td>
</tr>
<tr>
<td>Thailand</td>
<td>-76.8%</td>
<td>10.9%</td>
</tr>
<tr>
<td>China</td>
<td>-80.5%</td>
<td>8.8%</td>
</tr>
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*Excludes domestic travel

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| Bookings confirmed as 3 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. |
International flight searches show interest to travel to APAC despite COVID-19

Breakdown of international flight searches for travel Asia Pacific destinations 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.
The silver lining for APAC - Most bookings for the Summer are made in May- July

International bookings for travel to APAC in Summer Season (Jun-Aug)

Bookings made from 1 June 2019 to 19 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.
Further into the future..

What is searched?

What is booked?

What flights are on offer?
GET IN CONTACT!

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