

Destinations getting ready to take flight

April 2021



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ForwardKeys

PREDICTING TRAVELLERS' IMPACT



“Through provision of robust information on booking patterns and behaviours by specific source-market, ForwardKeys plays a vital role in informing and optimizing our planning for advertising campaigns. Assisting us in enhanced targeting and maximum impact.”



Dr. Andreas Golze
Market & Business
Intelligence Manager
Tourism Australia

WHAT DOES THE **LATEST** DATA SAY?

April 2021



86% drop in global international arrivals

Central America - around 40% of 2019

April 2021



80% drop in new tickets

The Caribbean - only 13% behind 2019



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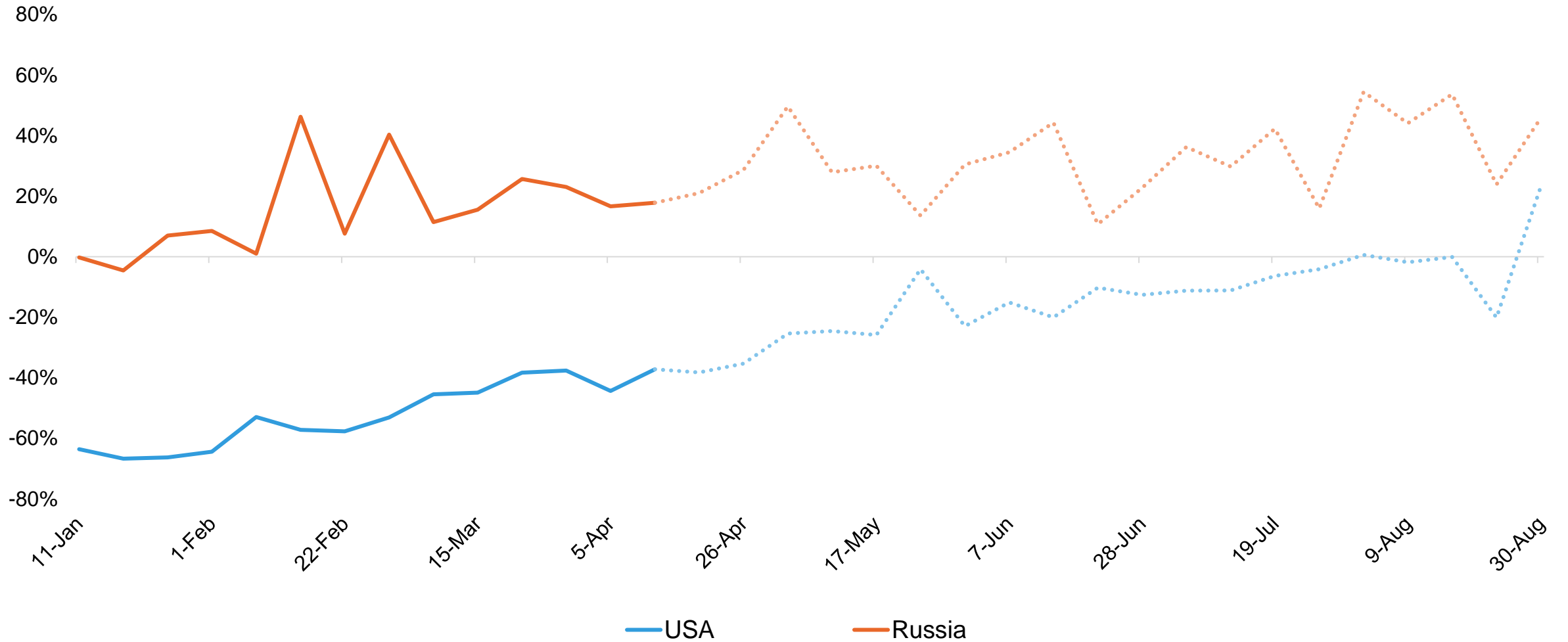
A **RACE** TOWARDS RECOVERY

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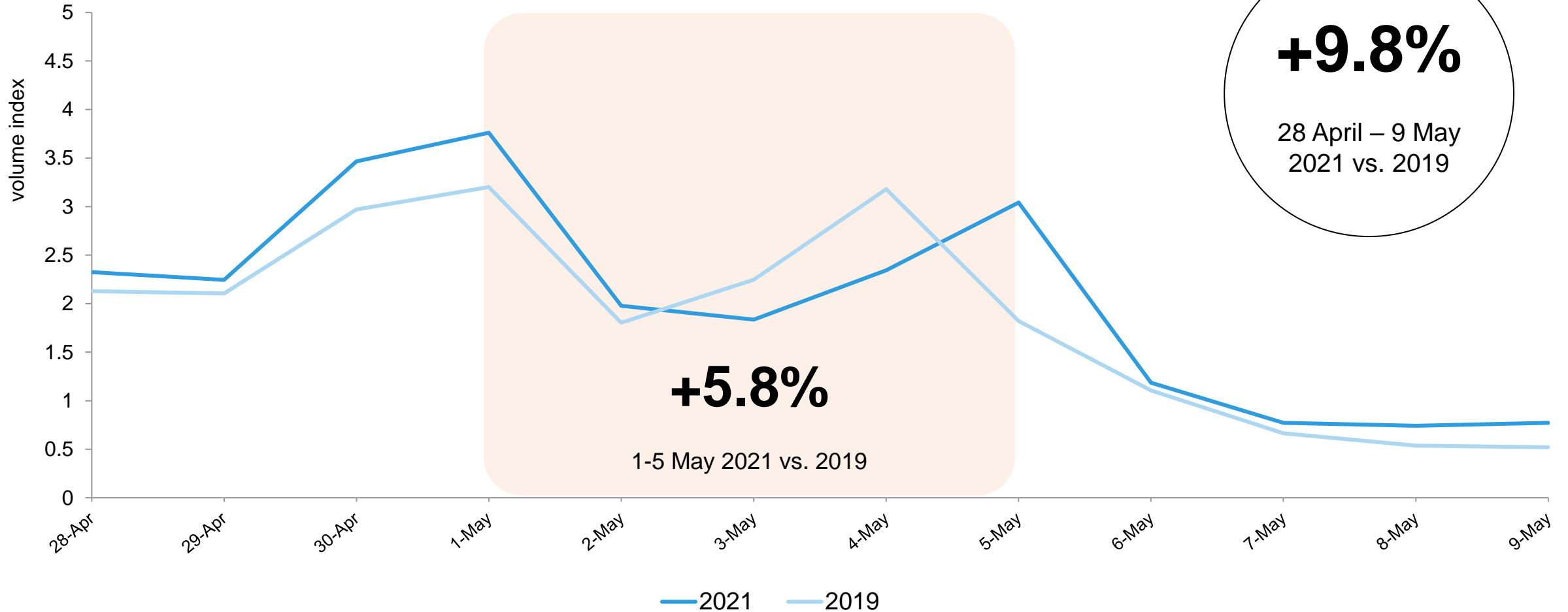
Domestic travel, a lifejacket for some destinations

Historical domestic arrivals and forward tickets, 2021 vs 2019



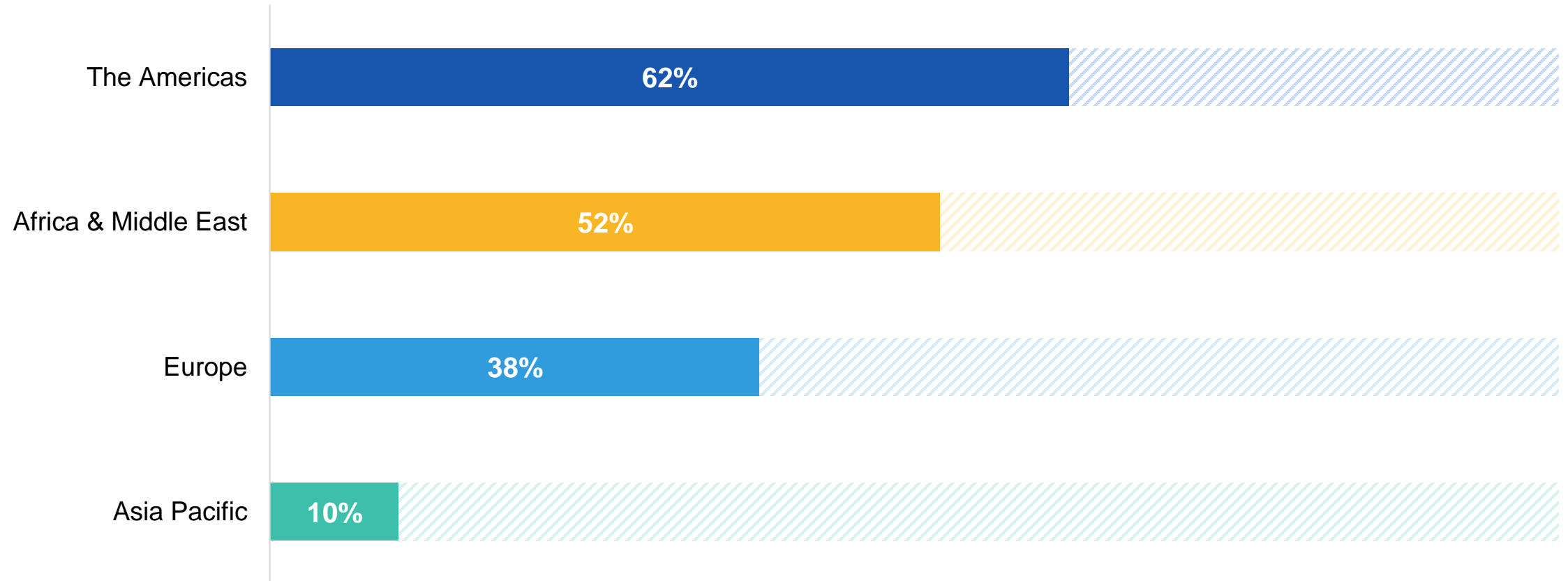
Record-breaking Labour Day holiday travel in China

Historical domestic arrivals and forward tickets, 2021 vs 2019



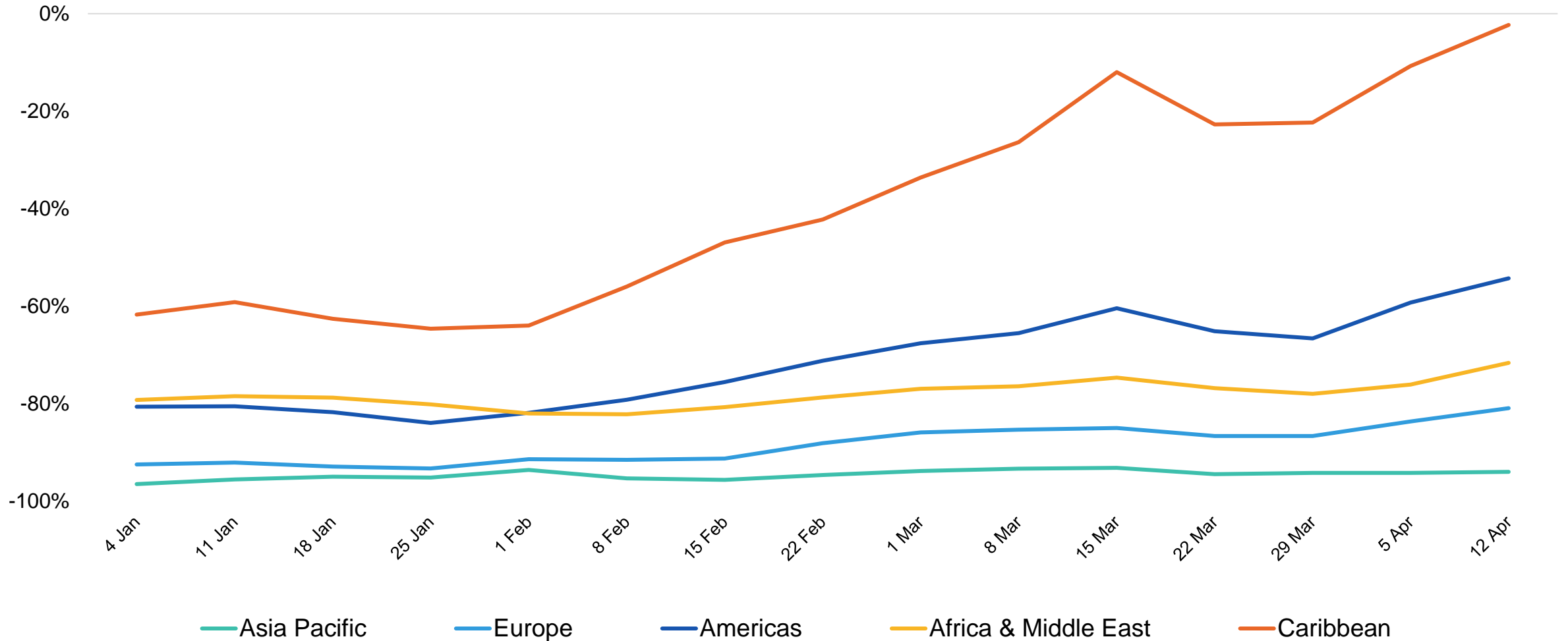
International travel recovery is highly asymmetrical

Confirmed tickets for international arrivals between May and August, by arrival region, 2021 vs 2019 volumes



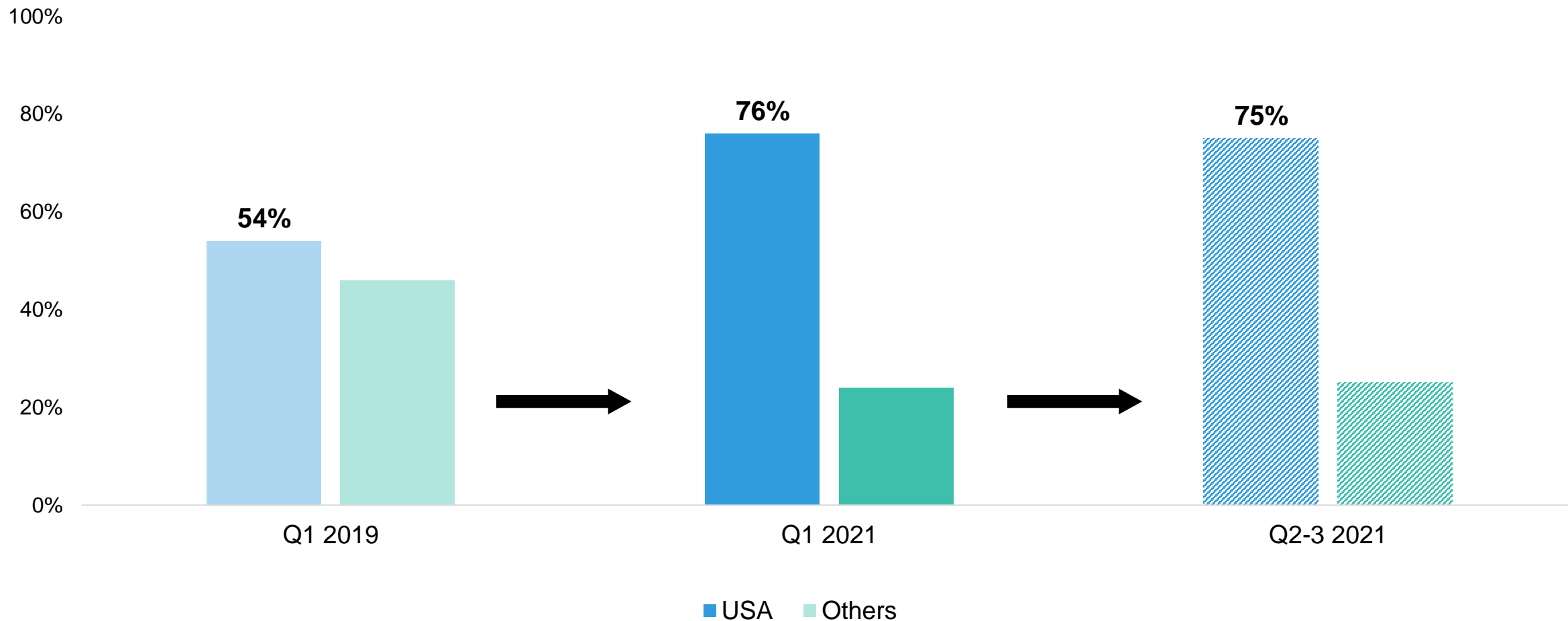
The Caribbean shows strong recovery

Tickets issued for global international arrivals, by arrival region, 2021 vs 2019



USA travellers behind Caribbean reactivation

% Share of confirmed tickets



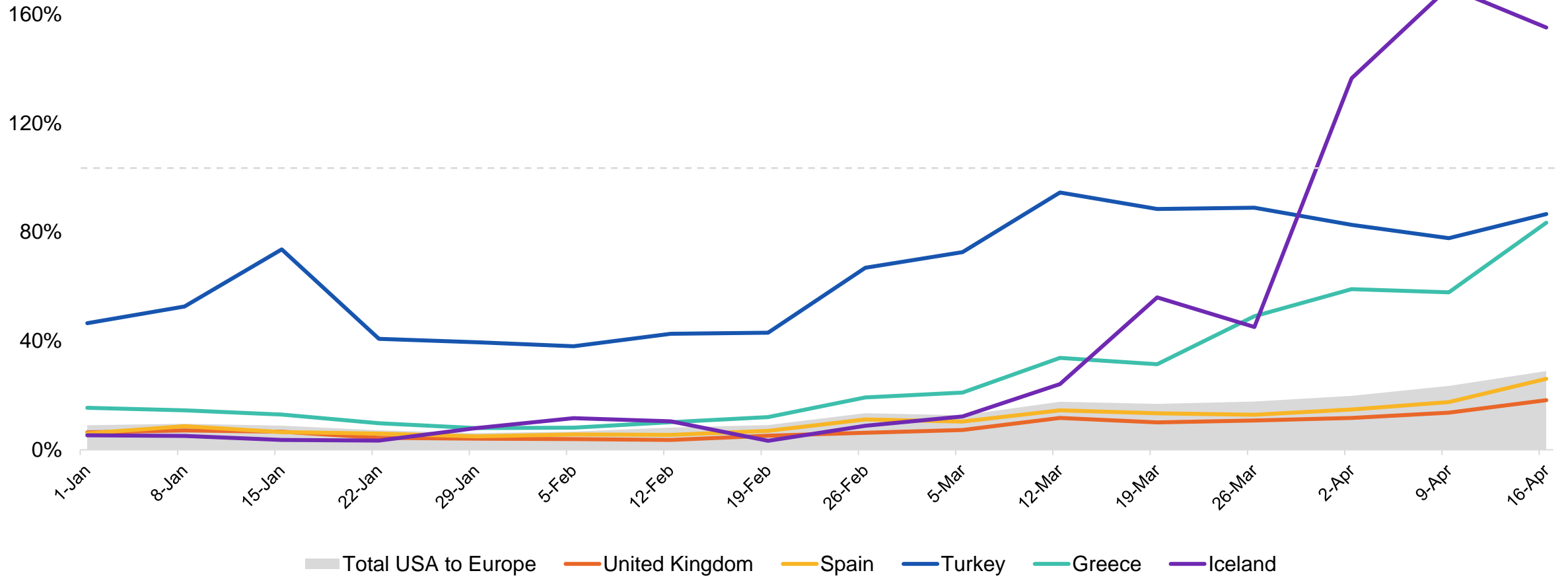
Record-breaking US visitors expected over Summer

Tickets issued for international travel to the Caribbean in May – August 2021, by destination country. 2021 vs 2019

Most resilient origin markets		YoY variation
1 st	US Virgin Islands	+107%
2 nd	Puerto Rico	+58%
3 rd	Turks & Caicos	+34%
4 th	Aruba	+14%
5 th	Saint Lucia	+6%
6 th	Jamaica	-3%
7 th	Sint Maarten	-8%
8 th	Antigua & Barbuda	-10%
9 th	Bahamas	-22%
10 th	Curaçao	-32%

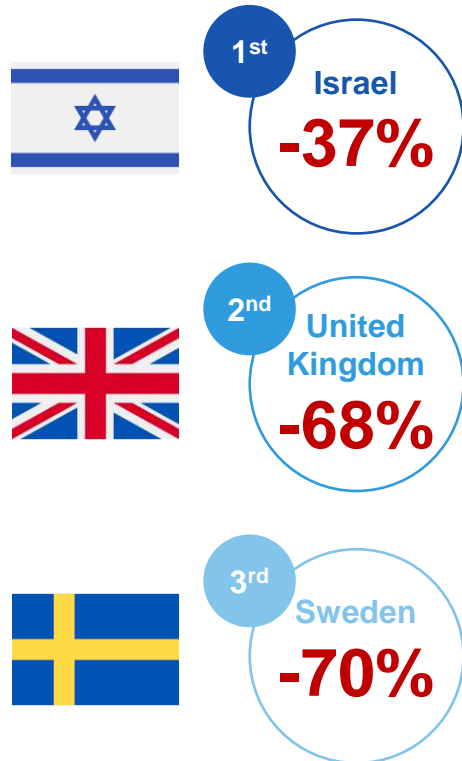
US travellers also keen on long-haul

Tickets issued for travelling to Europe from USA, by destination country. 2021 vs 2019



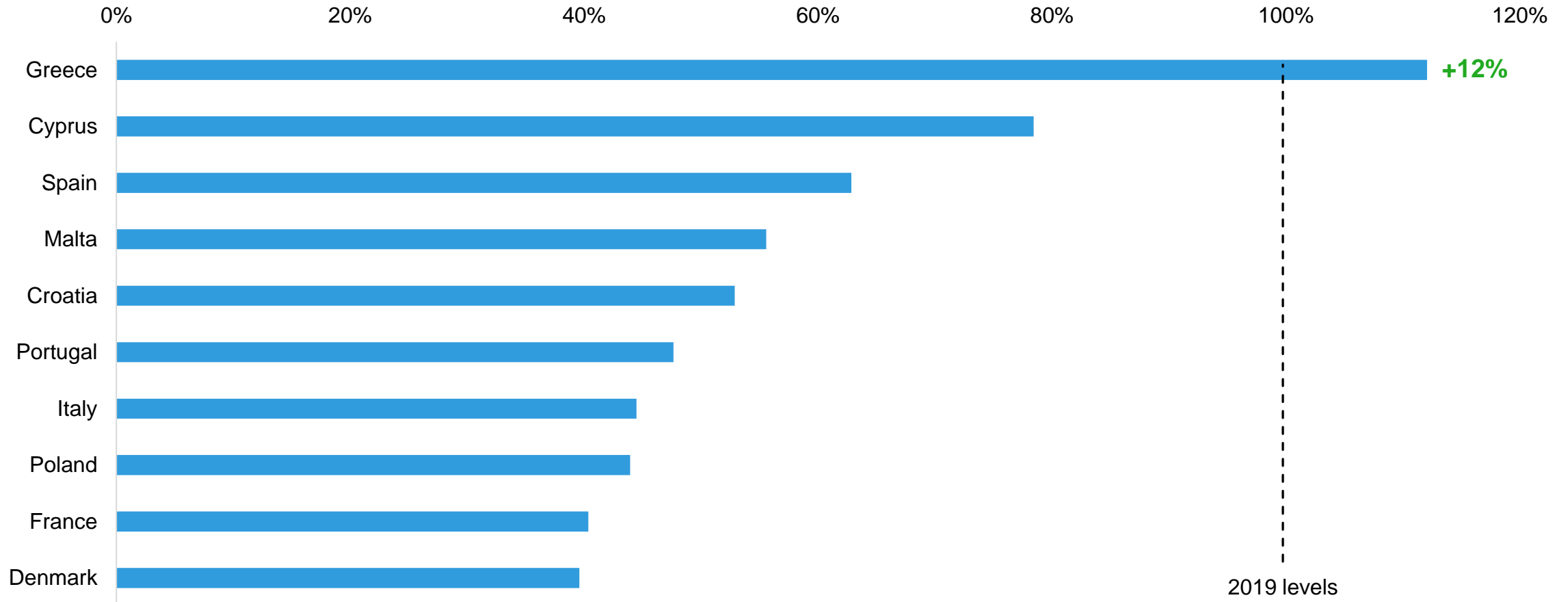
Vaccination impacts travel flows into Europe

Tickets issued for international travel to Europe, by origin country. 2021 vs 2019



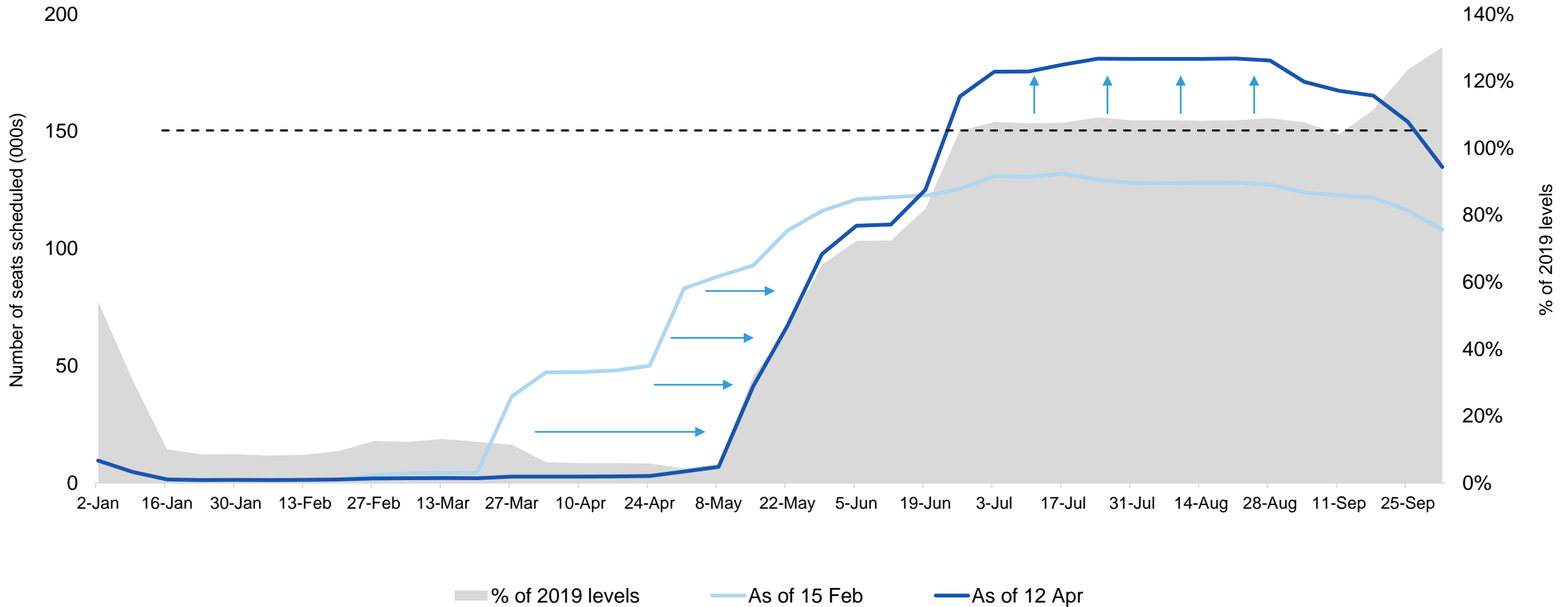
Top EU destinations for British travellers this summer

Confirmed tickets to travel between July and September 2021 vs 2019; % of 2019 levels



Airlines betting on Greece's recovery

Scheduled capacity from UK to Greece as of 15 February 2021 vs. 12 April 2021





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GETTING READY FOR RECOVERY

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Take-Aways

1

Recovery has started and will be asymmetrical

2

Think out of the box to identify opportunities beyond global trends and traditional markets

3

Data can empower multi-disciplinary stakeholders in the tourism sector to navigate past uncertainty.



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