



ForwardKeys
PREDICTING TRAVELLERS' IMPACT

Data - The Key for Smart Investors

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May 2022



ForwardKeys data captures and reflects the entire traveller journey



Main Data partners



* Historic data



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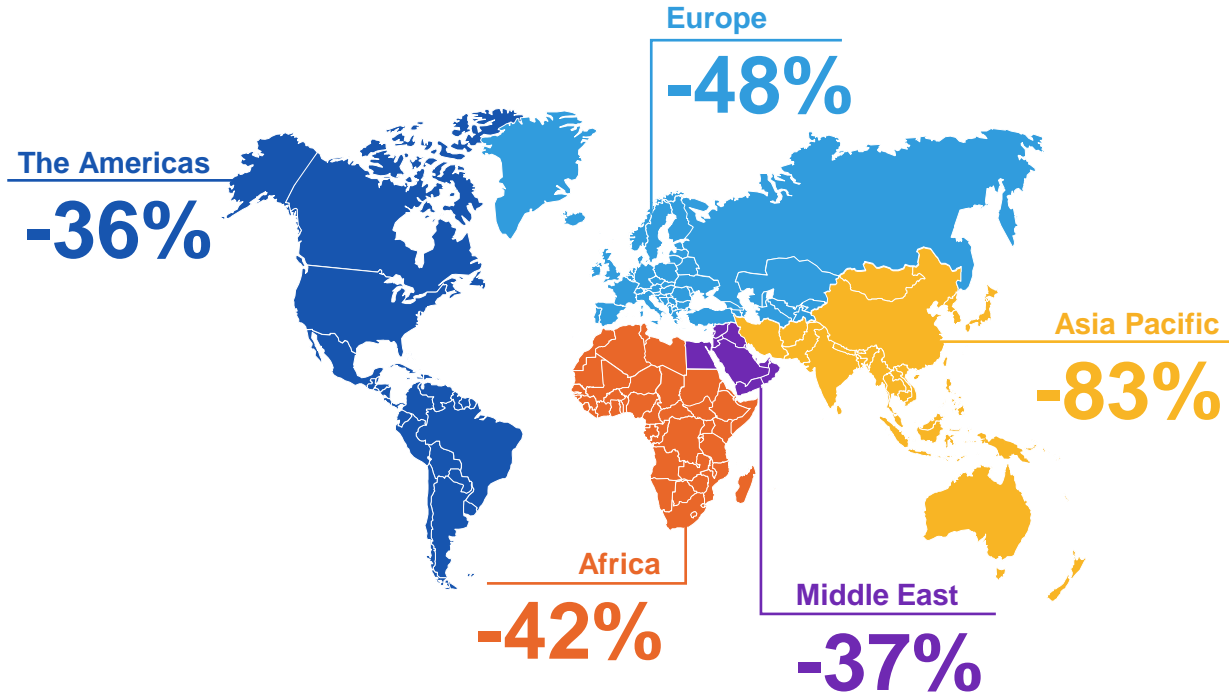
Current travel trends

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The Americas and the Middle East lead the way in the travel recovery

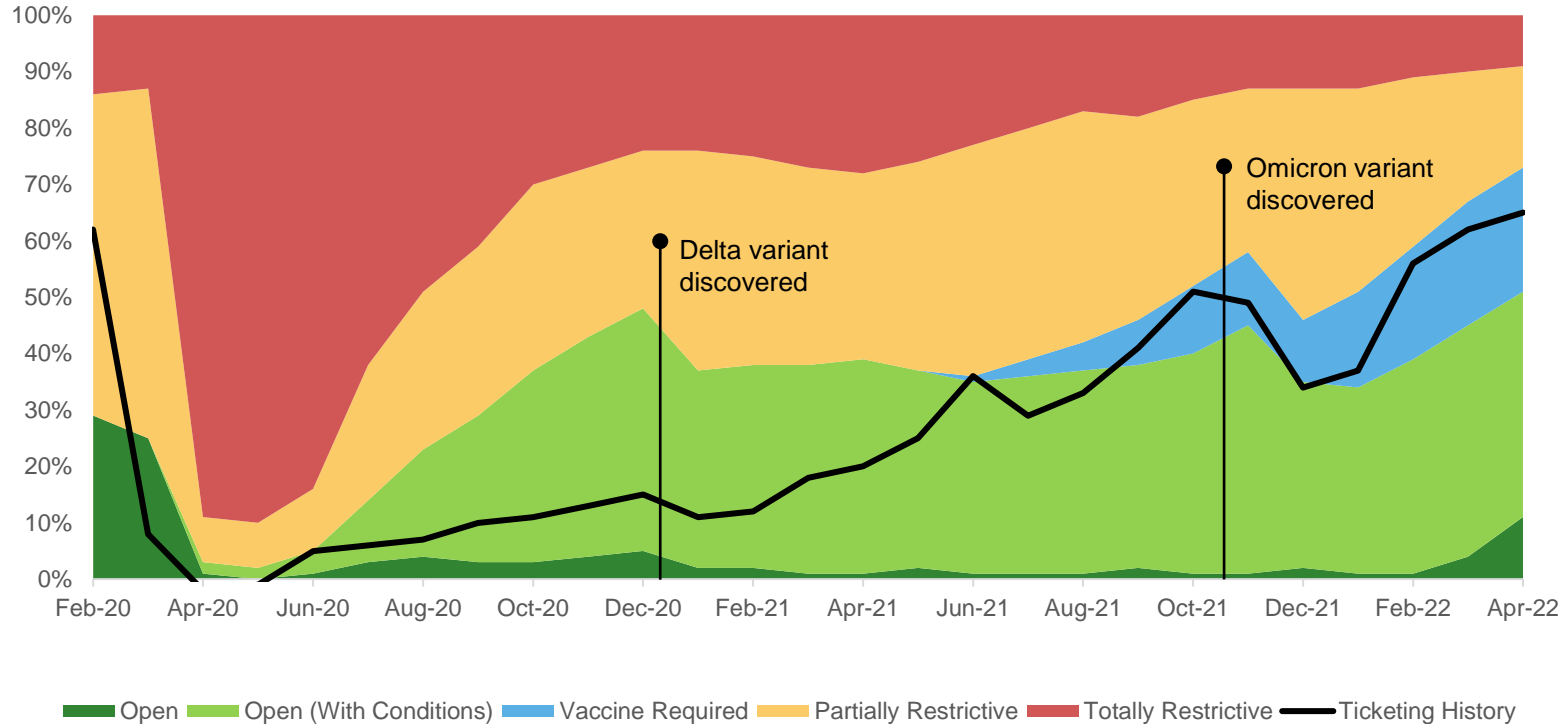
Worldwide International Arrivals year to date, vs 2019 levels



Source: ForwardKeys Air Ticket Data.

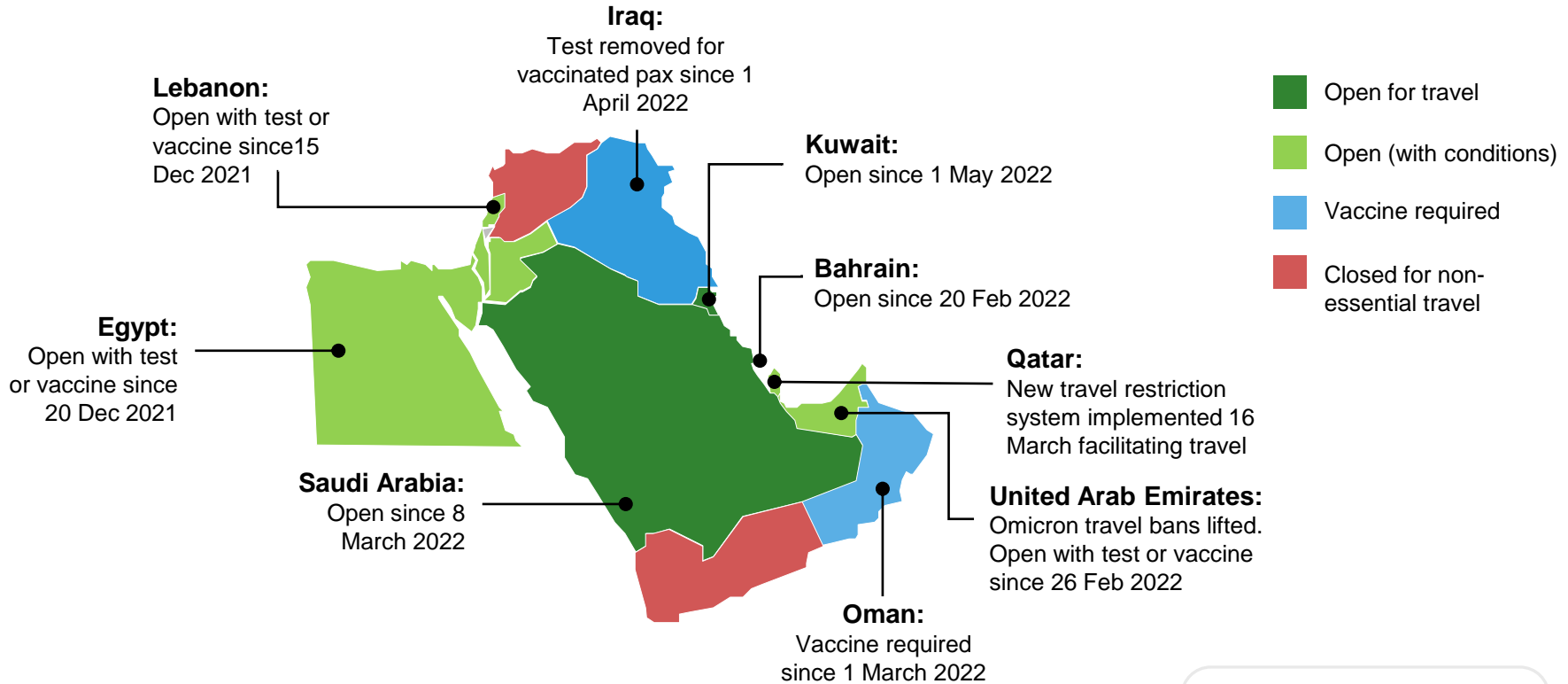
When travel restrictions are lifted, bookings go up

Issued tickets for air travel; compared with 2019, and global inbound travel restrictions



Source: ForwardKeys Air Ticket Data & Travel Restrictions Data.

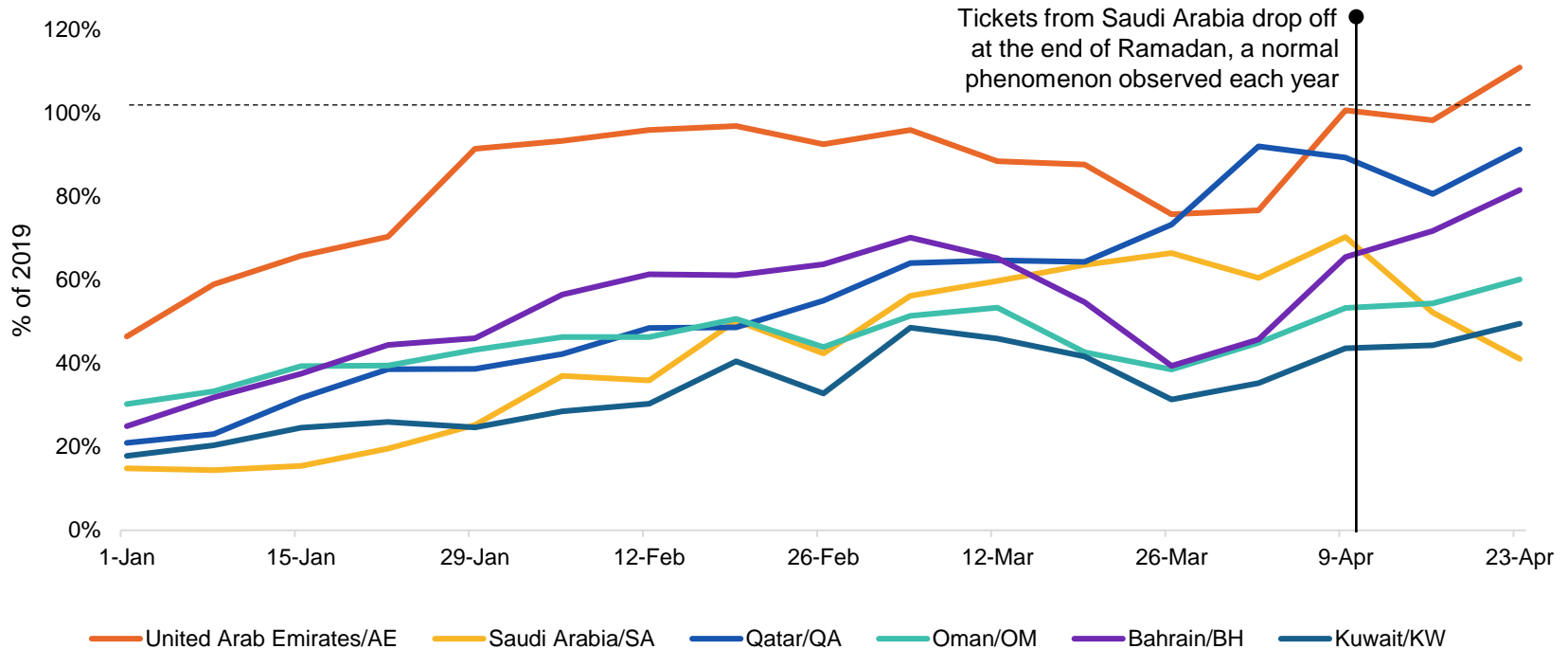
Travel Restrictions in the Middle East



Source: ForwardKeys Travel Restriction Data.

Booked tickets are on the rise, with the UAE driving the recovery

Tickets issued year to date, for all future international arrivals to the GCC; vs 2019 levels



Source: ForwardKeys Air Ticket Data.



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What are we expecting looking further into 2022?

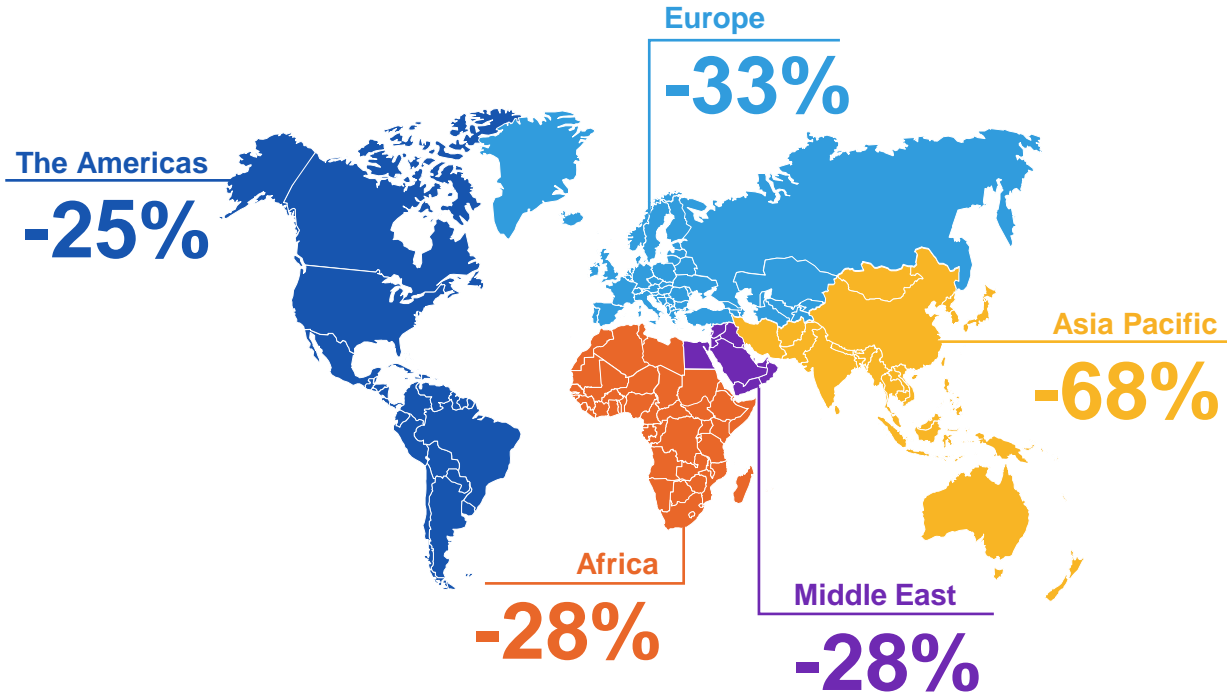


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Looking forward, global recovery is speeding up

Worldwide International Arrivals on-the-book between May and August, vs 2019 levels



Source: ForwardKeys Air Ticket Data.

1 night stays are driving the recovery

On-the-book International Arrivals to the GCC between May and August 2022, as of 11 May; vs 2019 levels

Most resilient cities		vs 2019
1st	Jeddah (SA)	+47%
2nd	Doha (QA)	+30%
3rd	Abu Dhabi (AE)	+16%
4th	Riyadh (SA)	-5%
5th	Bahrain (BH)	-19%
6th	Dubai (AE)	-35%
TOTAL		-10%

*Out of destinations with a share of >2% total arrivals

 Source: ForwardKeys Air Ticket Data.

Dubai leads the recovery for stays of 2 nights or more

On-the-book International Arrivals to the GCC between May and August 2022, as of 11 May; vs 2019 levels

Most resilient cities		vs 2019
1st	Dubai (AE)	-5%
2nd	Bahrain (BH)	-10%
3rd	Doha (QA)	-28%
4th	Abu Dhabi (AE)	-36%
5th	Muscat (OM)	-40%
TOTAL		-47%

*Out of destinations with a share of >1% total arrivals

 Source: ForwardKeys Air Ticket Data.

Forward bookings from the US and France to the GCC are ahead of 2019 levels

On-the-book International Arrivals to the GCC between May and August 2022, as of 11 May; vs 2019 levels

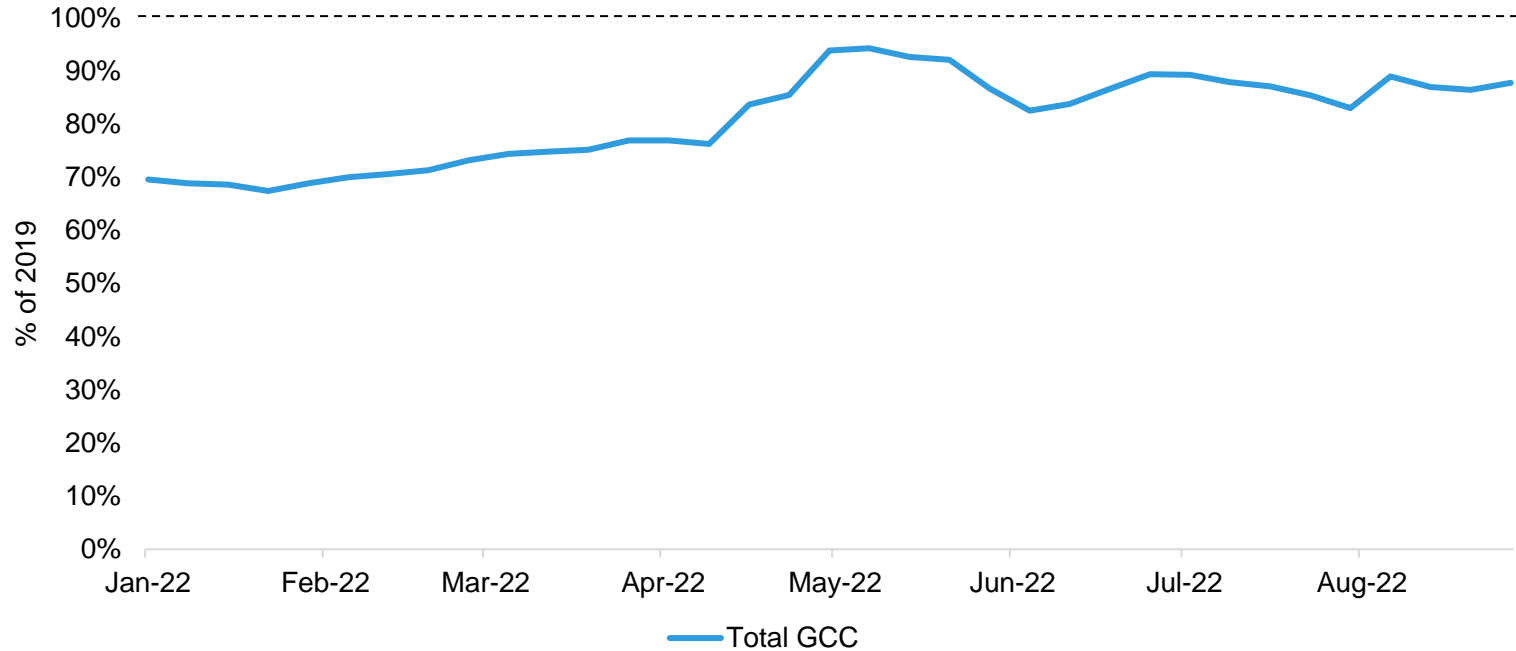
Most resilient source markets		vs 2019
1st	U.S.A.	+10%
2nd	France	+5%
3rd	United Kingdom	-10%
4th	Saudi Arabia	-10%
5th	Indonesia	-15%
TOTAL		-47%

*Out of source markets with a share of >1% total arrivals

 Source: ForwardKeys Air Ticket Data.

The pickup in demand is supported by air capacity

Seat Capacity between 1 Jan and 30 Sept 2022; % of 2019



Source: ForwardKeys Seat Capacity Data



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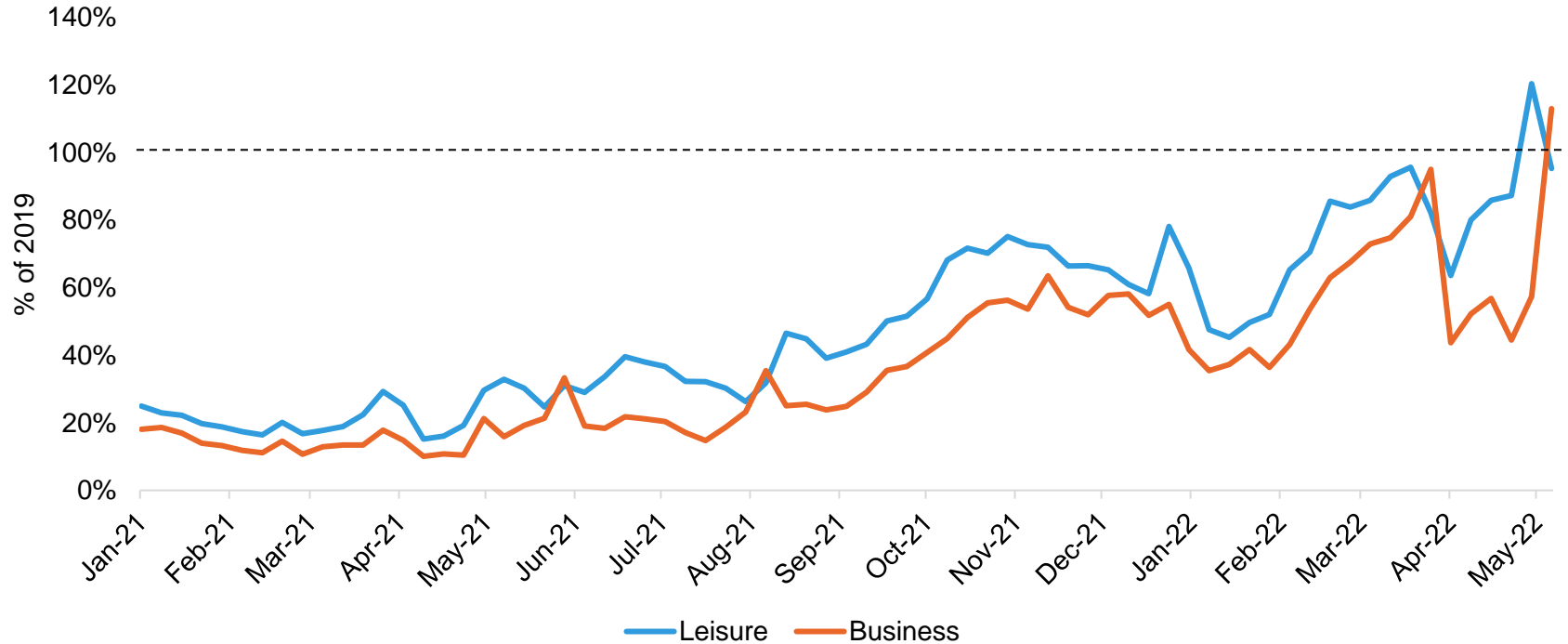
International Business travel

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Business and Leisure travel are both recovering at a steady pace

International Arrivals to the GCC year to date, as of 4 May



Source: ForwardKeys Air Ticket Data.



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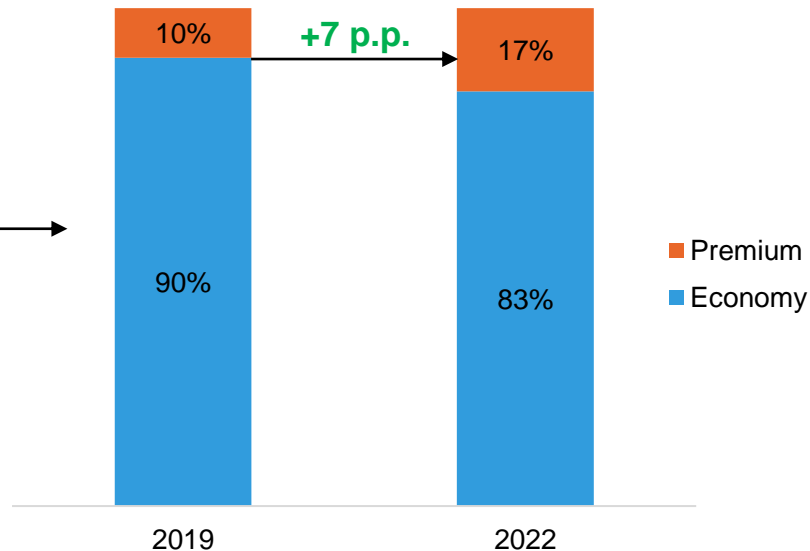
**The high end of the sector
will keep driving the recovery**

Premium travellers from key markets are recovering faster

On-the-book international arrivals to the GCC from May to August 2022, as of 5 May; vs 2019

Top origin markets		(Var vs 2019)
1 st	United Kingdom	+5%
2 nd	U.S.A.	+21%
3 rd	India	-44%

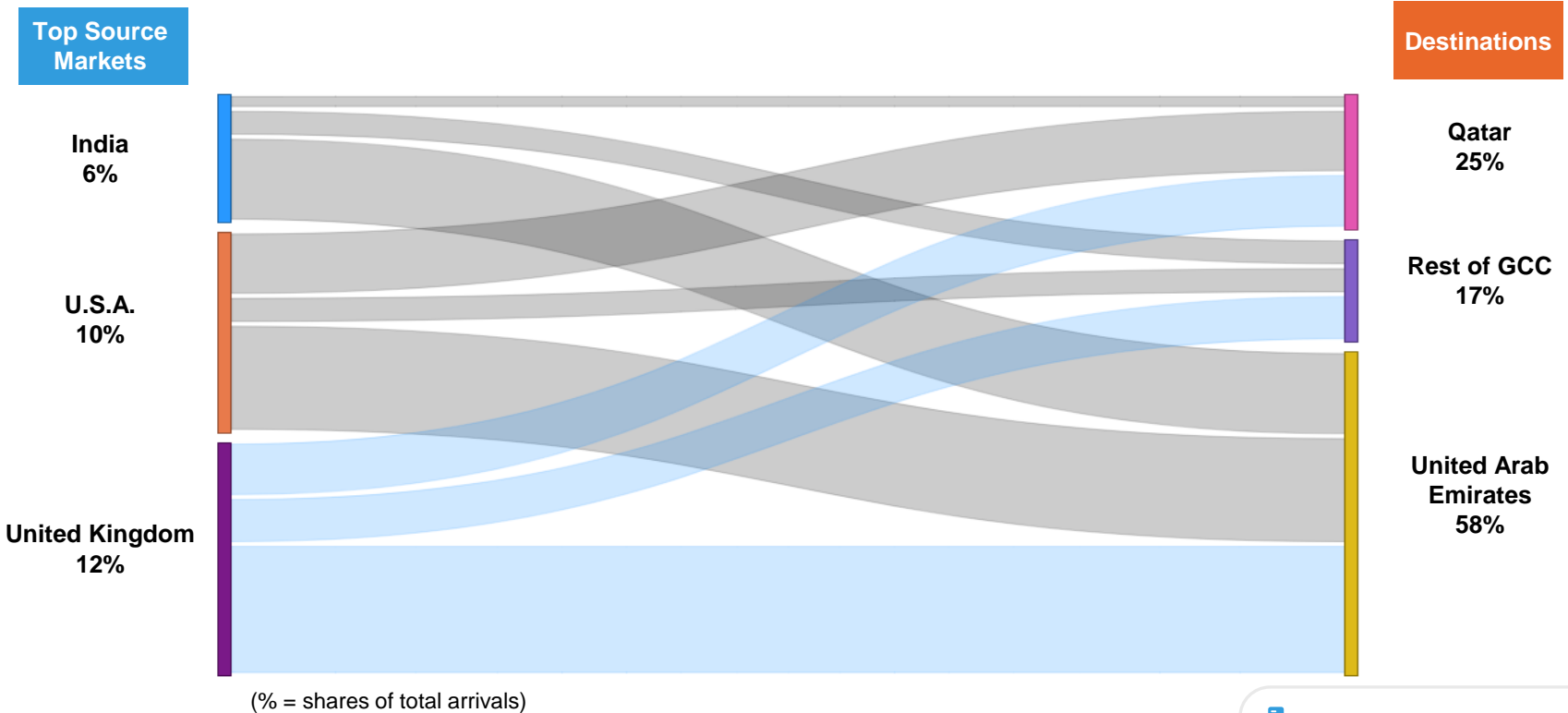
Share of cabin classes for arrivals to GCC countries from the UK



Source: ForwardKeys Air Ticket Data.

The UAE has a strong grip on the UK travel market

On-the-book international arrivals to the GCC from May to August 2022, as of 5 May

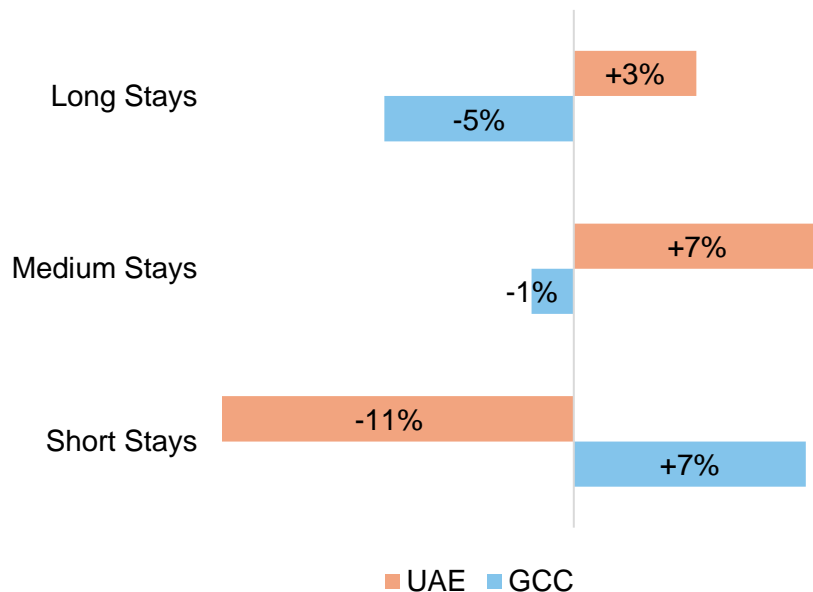


Source: ForwardKeys Air Ticket Data.

UK travellers tend to stay longer in the UAE than the rest of the GCC

On-the-book international arrivals from the UK to the UAE and to the GCC from May to August 2022, as of 5 May 2022; vs 2019

Percentage changes in shares compared with 2019

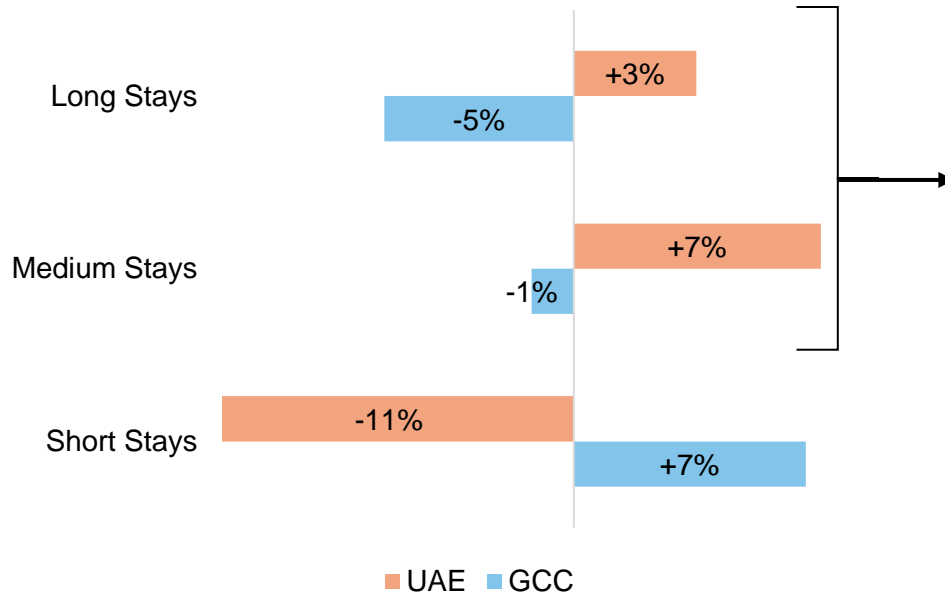


Source: ForwardKeys Air Ticket Data.

UK travellers tend to stay longer in the UAE than the rest of the GCC

On-the-book international arrivals from the UK to the UAE and to the GCC from May to August 2022, as of 5 May 2022; vs 2019

Percentage changes in shares compared with 2019



Travel purpose for UK travellers to the UAE (4 nights +)

Business: **4%**
Leisure: **77%**
Group: **15%**
VFR: **4%**

Source: ForwardKeys Air Ticket Data.



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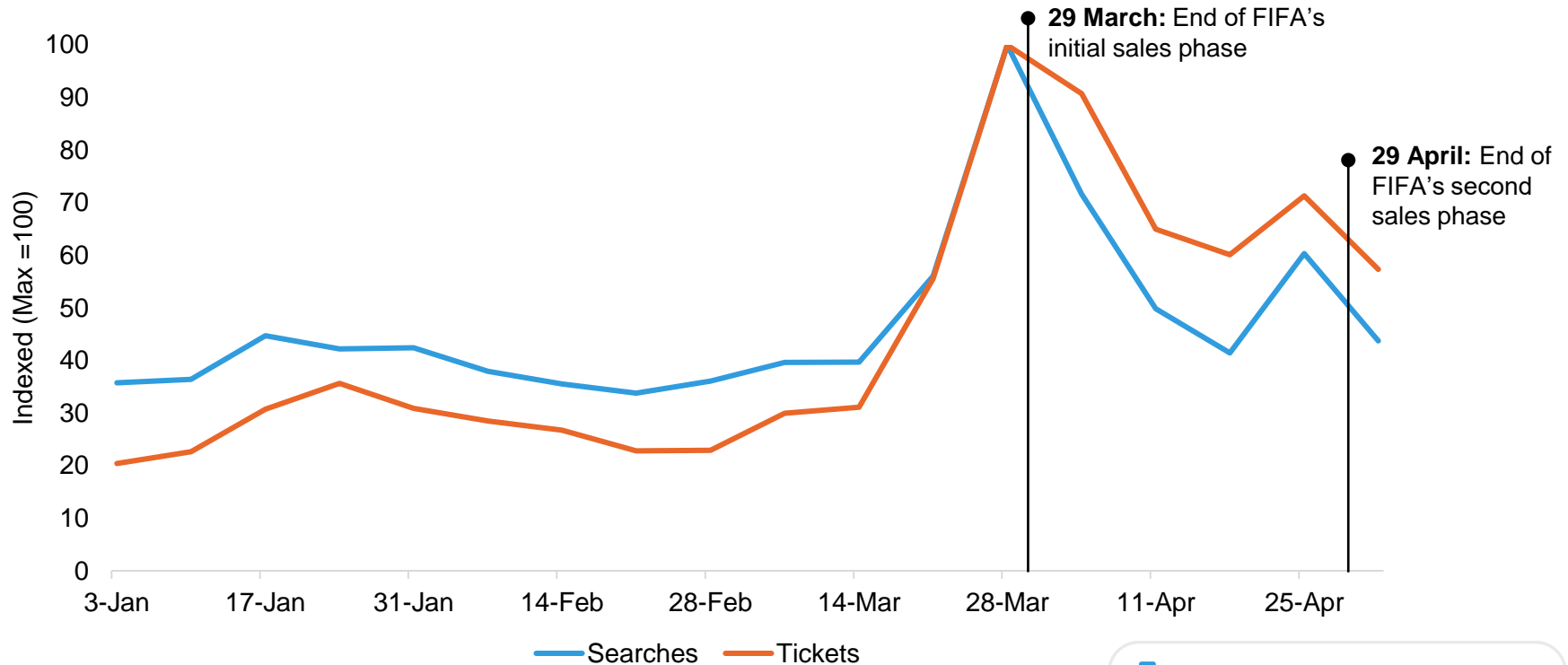
Back to normality?

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Flight searches to Qatar are soaring due to ticket sales of the FIFA world cup

International Flight Searches to Qatar year to date and booked tickets YTD for arrivals in Nov and Dec 2022, as of 8 May 2022



Source: ForwardKeys Flight Searches and Air Ticket Data



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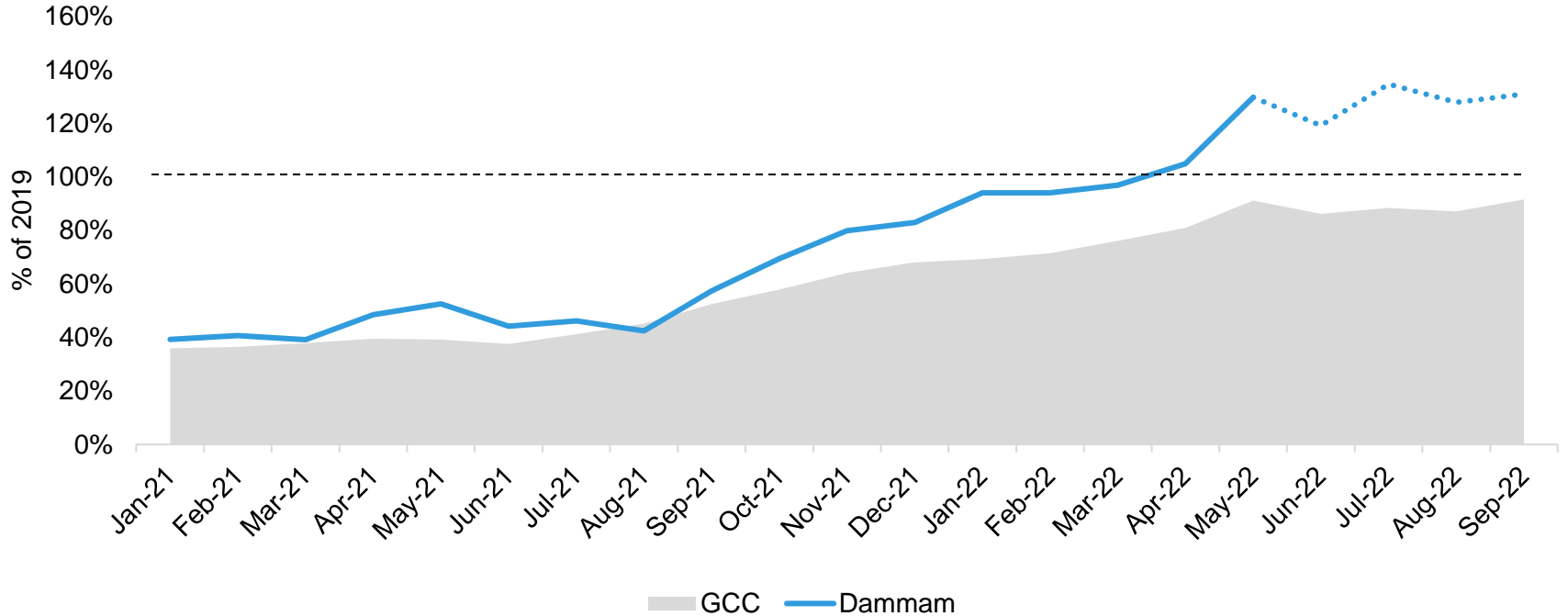
Emerging destinations

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Dammam has surpassed pre-pandemic capacity since April 2022

Scheduled capacity for international arrivals to the GCC between January 2021 and Sept 2022 as scheduled on 16 May 2022; vs 2019 levels



Source: ForwardKeys Seat Capacity Data

Take-Aways

1

The region is reopening on time to capitalize on the rebound of global travel

3

The “new-normal” looks increasingly like the old

2

The high end of the sector is recovering faster


4

It's time to be smart with data

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