



WEBINAR

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

April 15, 2020

EUROPEAN
TRAVEL
COMMISSION



ForwardKeys has data that captures and reflects the entire traveller journey



Searching



Flight Searches



Offer



Seat Capacity



Incident impact



**Bookings & Tickets
on-the-book**



Future



**Total Air Market
Forecast**





A photograph of an airport departure board. The board lists several flights, all of which are marked as 'Cancelled'. The flights include destinations like Plymouth, Salzburg, Faro, Malaga, Manchester, Sofia, Innsbruck, Naples, Geneva, and Malta. Each entry includes a time, a flight number, and the status 'Cancelled'. The board is tilted and the text is slightly blurred.

Time	Destination	Flight Number	Status
11:55	Plymouth	2653	Cancelled
12:15	Salzburg	Y892	Cancelled
12:55	Faro	Y860	Cancelled
13:15	Malaga	2905	Cancelled
13:20	Manchester	Y897	Cancelled
13:35	Sofia	2691	Cancelled
13:45	Innsbruck	2607	Cancelled
13:45	Naples	S847	Cancelled
14:00	Geneva	Y882	Cancelled
14:25	Malta		Cancelled

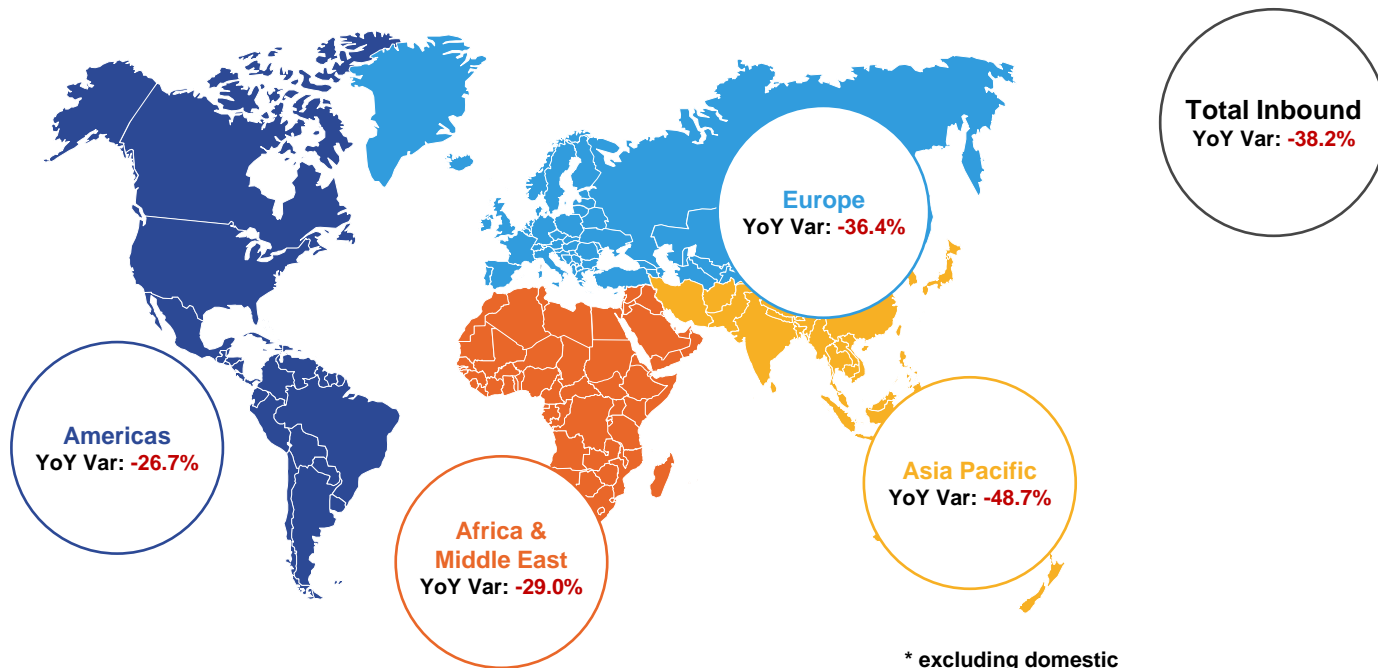
Widespread declines across Europe in Q1



Europe is the second most impacted world region in Q1, 2020

Arrivals to world regions Jan-Mar 2020*

1 January to 31 March 2020; Year-on-Year variations by region



* excluding domestic



Arrivals from 1 January to 31 March 2020 vs same period in 2019.



Only considered pax staying 1 to 21 nights at destinations.

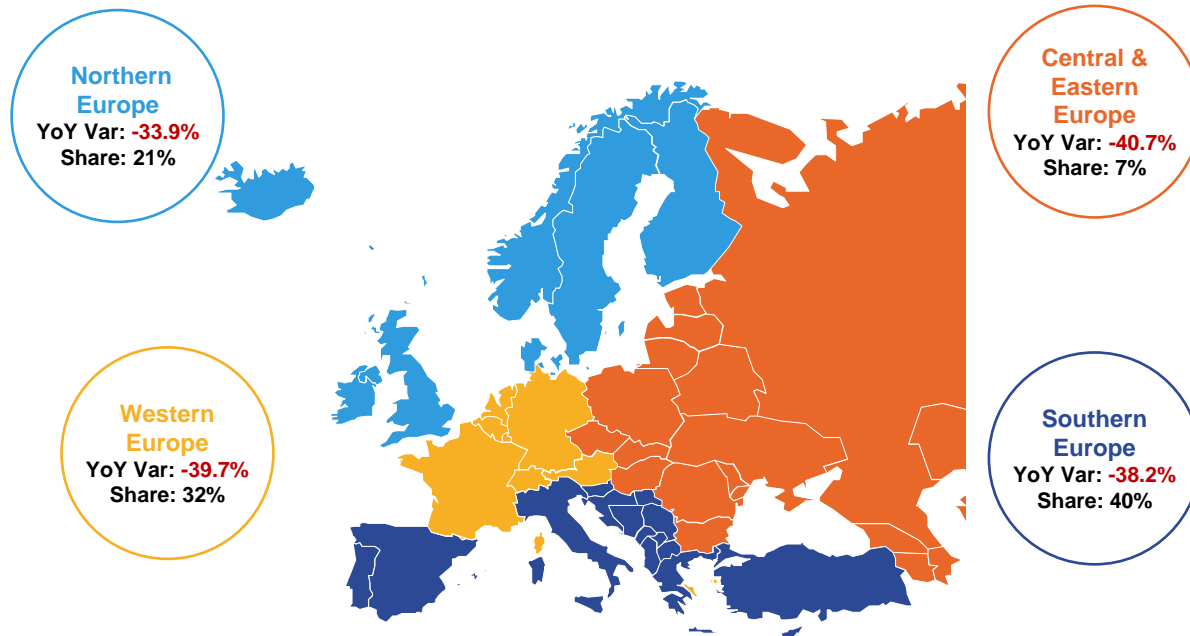


Source: ForwardKeys air reservation data.

Long-haul arrivals decline across all European sub-regions

Arrivals to European regions Jan-Mar 2020*

1 January to 31 March 2020; Market shares by region and Year-on-Year variations



* excluding domestic



Arrivals from 1 January to 31 March 2020 vs same period in 2019.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys air reservation data.

Top 10 European markets – Italy with the most declines

Top 10 European destination countries for long-haul* travellers Q1 2020

	YoY % var	% Share
United Kingdom	-32.3%	15.3%
France	-37.3%	13.5%
Spain	-34.6%	12.1%
Italy	-48.0%	9.7%
Germany	-44.8%	9.1%
Turkey	-34.9%	8.8%
Netherlands	-37.6%	3.7%
Portugal	-21.8%	3.6%
Switzerland	-35.5%	3.6%
Russia	-43.5%	1.9%

* Only excludes Intereuropean travel



Arrivals from 1 January to 31 March
2020 vs same period in 2019.



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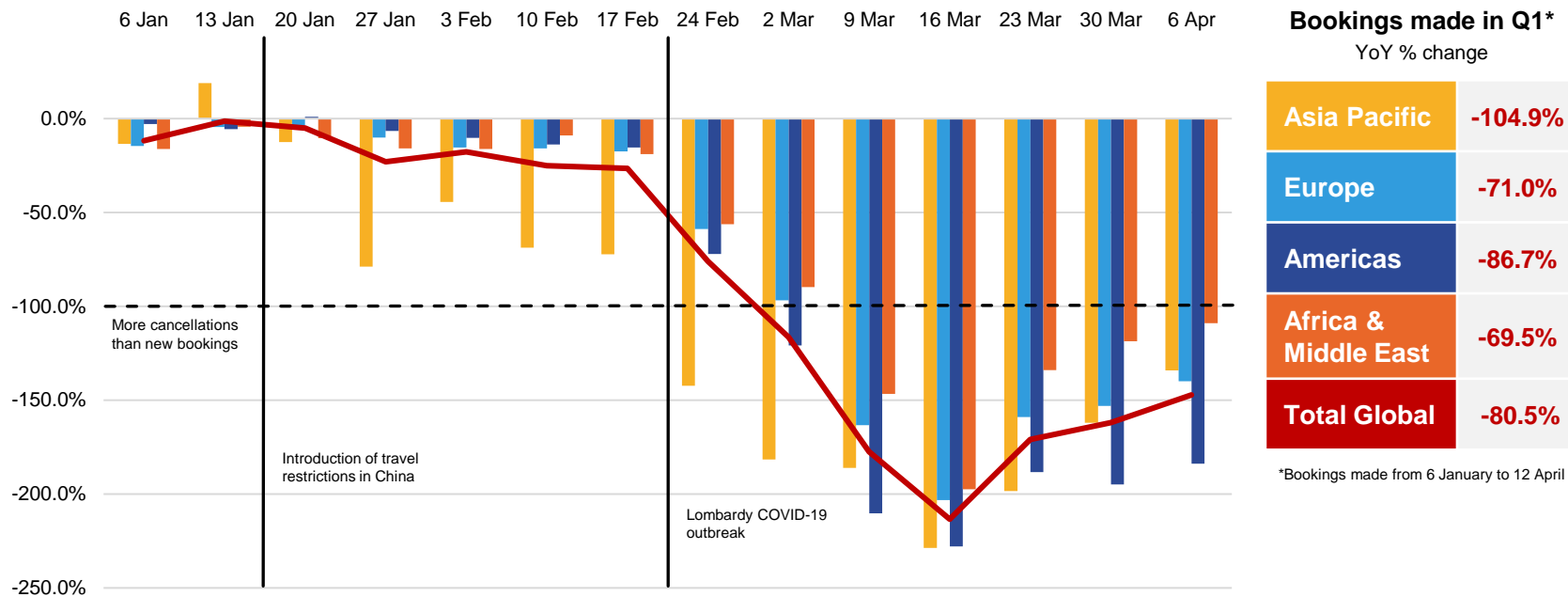
Source: ForwardKeys air reservation data.

Future travel bookings to Europe plummet by 75.9% from January



Bookings made for International travel to Europe by departure region

6 January to 12 April, Year on Year variations



Booking made from 6 January to 12 April 2020 vs same period in 2019 for future travel at any time.



Only considered pax staying 1 to 21 nights at destinations.

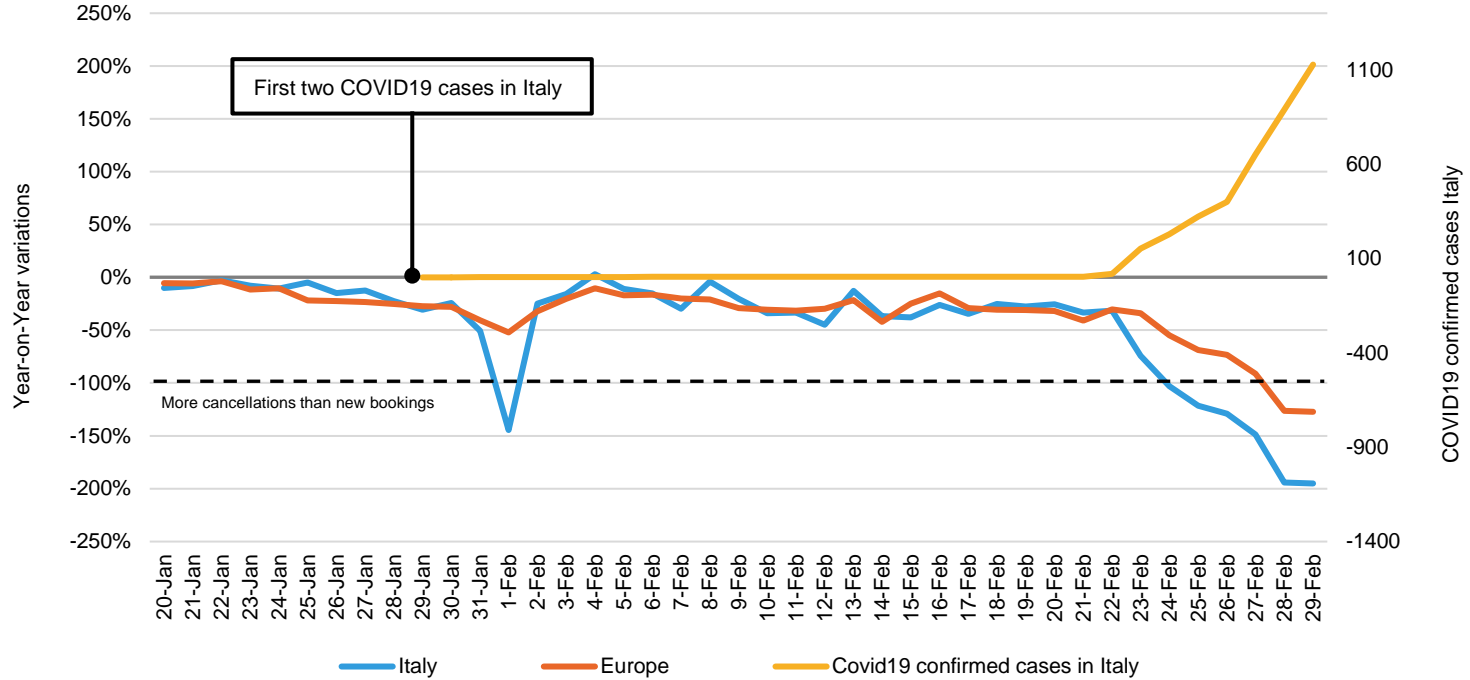


Source: ForwardKeys air reservation data.

The Lombardy outbreak halts new bookings to Italy and Europe

Bookings made for arrivals to Europe & Italy from worldwide destinations

20 January to 29 February 2020; Year-on-Year variations



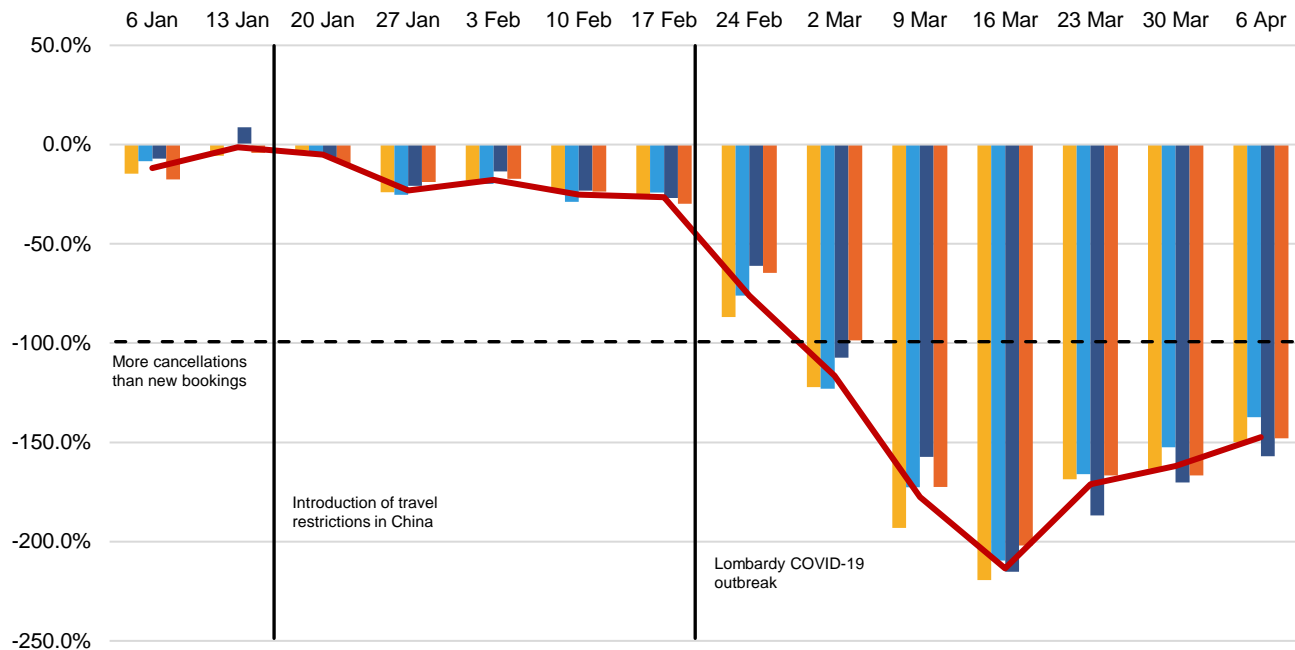
Arrivals from 20 January to 29 February 2020 vs same period on previous year.
 Only considered pax staying 1 to 21 nights at destinations.
 Source: ForwardKeys air reservation data.

The whole of Europe shares similar trend



Bookings made for International travel to Europe by arrival region

6 January to 12 April, Year on Year variations



Bookings made in Q1*

YoY % change

Southern Europe	-82.9%
Western Europe	-79.1%
Northern Europe	-78.6%
Central & Eastern Europe	-79.3%
Total Europe	-80.5%

*Bookings made from 6 January to 12 April



Booking made from 6 January to 12 April 2020 vs same period in 2019 for future travel at any time.



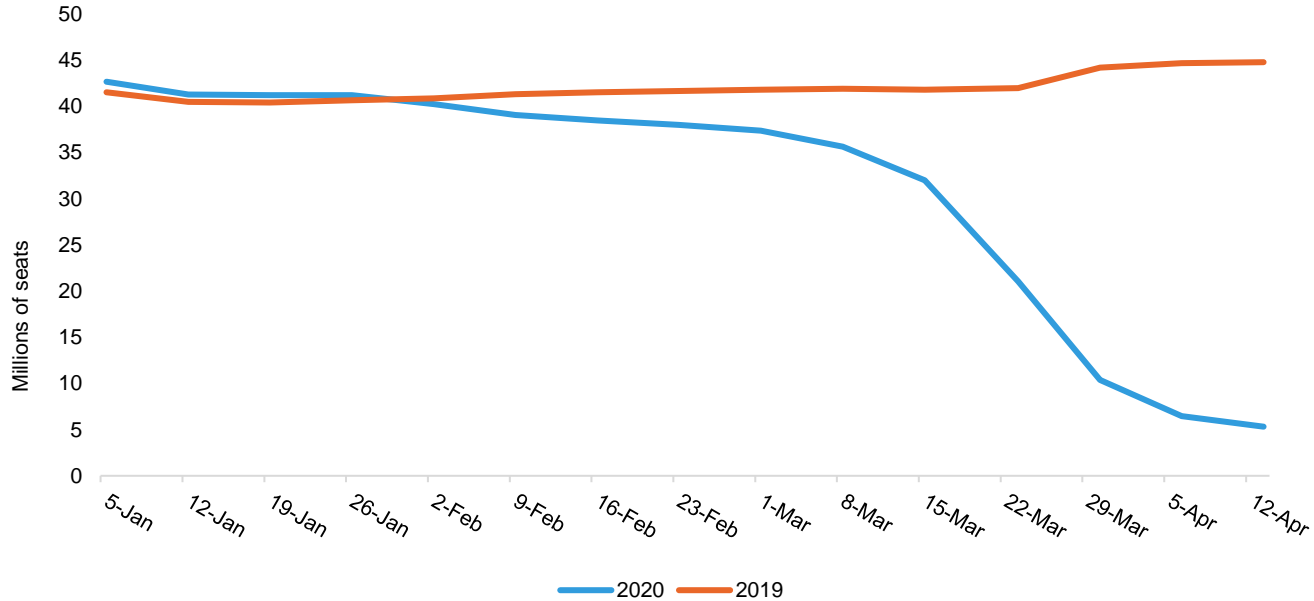
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Source: ForwardKeys air reservation data.

Air capacity continues its downward spiral

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.



Air Capacity for flight dates between 01 Jan – 19 Apr 2020 vs same period in 2019, for Worldwide travel*, as of 14 Apr 2020. *(Excluding domestic)



Source: ForwardKeys &





A photograph of an airport departure board. The board lists several flights, all of which are marked as 'Cancelled'. The flights include destinations like Plymouth, Salzburg, Faro, Malaga, Manchester, Sofia, Innsbruck, Naples, Geneva, and Malta. Each entry includes a time, a flight number, and the status 'Cancelled'. The board is tilted and the text is slightly blurred.

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Outlook



All top European destinations show similar outlook for the Summer

Top 10 European destination countries for long-haul travellers – June, July & August 2020

	YoY % var	% Share
Italy	-57.5%	14.0%
United Kingdom	-54.7%	14.0%
France	-54.0%	10.5%
Spain	-56.7%	8.4%
Germany	-53.5%	6.7%
Russia	-42.6%	5.0%
Greece	-47.7%	4.2%
Netherlands	-52.8%	4.2%
Portugal	-50.7%	3.5%
Ireland	-42.6%	3.4%

* Only excludes Intereuropean travel



Bookings confirmed as 12 April 2020 vs same period last year, for travel in June – August 2020 vs travel in June – August 2019.



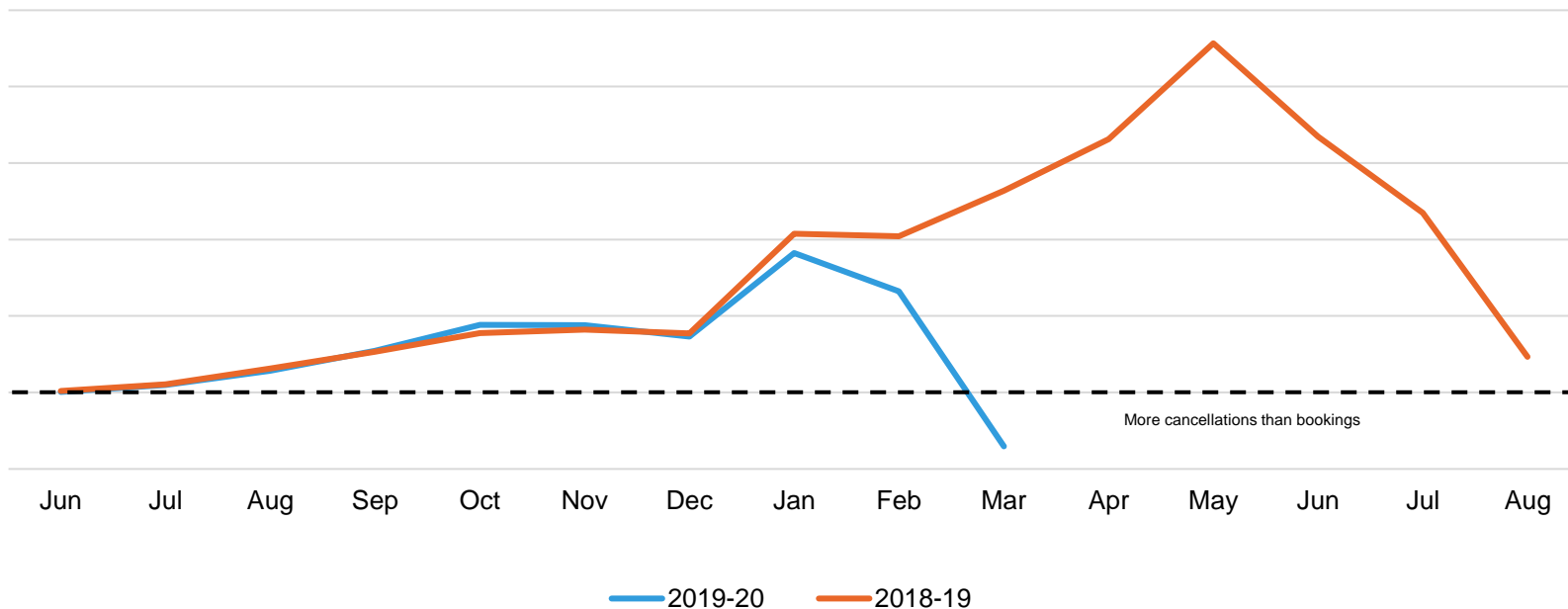
Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys air reservation data.

The silver lining for Europe - Most bookings for the Summer are made in May- July

Long haul flight bookings to Europe for travel in June, July and August



Bookings made from 1 June 2019 to 31 March 2020 vs same period last year, for travel in June – August 2020 vs travel in June – August 2019.



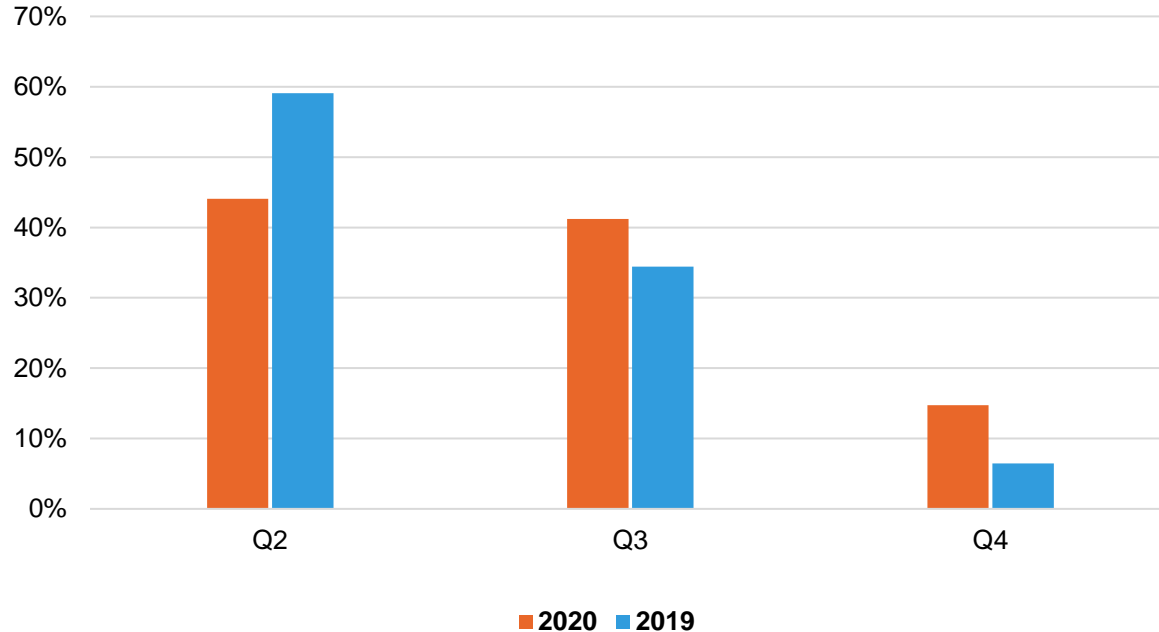
Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys air reservation data.

Italians appetite for travel persists despite being in quarantine!

Breakdown of flight searches from Italy performed in March for a departure in...



Flight searches from 1 to 31 March 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





ForwardKeys
KNOW TOMORROW'S TRAVELLERS

GET IN CONTACT!



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