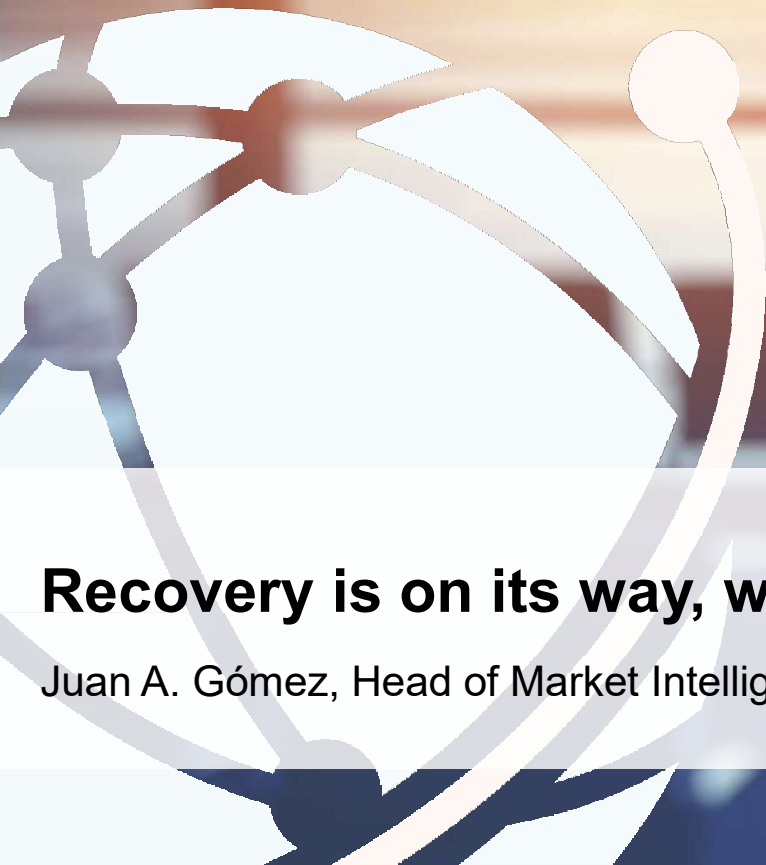




ForwardKeys
PREDICTING TRAVELLERS' IMPACT



Recovery is on its way, what does the data say?

Juan A. Gómez, Head of Market Intelligence



**6ª CUMBRE MUNDIAL
DE ASOCIACIONES DE
AGENCIAS DE VIAJES**

LEÓN, DEL 3 AL 6 DE NOVIEMBRE 2021

tourisleon

LEÓN

cear
CONSEJO REGULADOR DE AGENCIAS DE VIAJES



ForwardKeys

PREDICTING TRAVELLERS' IMPACT

“The ability to anticipate future arrivals has become key to coping with the effects of this pandemic on the tourism sector. ForwardKeys has provided the Dominican Republic with the appropriate tools to build an efficient action plan. In these rapidly changing times, our marketing and international cooperation strategies are deeply dependent on the near future.”

Enrique Penson, Intelligence Unit



Ministerio de Turismo
REPÚBLICA DOMINICANA



Sun and Sea Destinations continue outperforming in October

Top 10 most resilient destination cities for international arrivals in October 2021 vs 2019

1 st	San Juan (PR)	+35%
2 nd	San Jose Cabo (MX)	+29%
3 rd	Cancun (MX)	+22%
4 th	Punta Cana (DO)	+20%
5 th	Aruba (AW)	+10%
6 th	Palma Mallorca (ES)	+3%
7 ^h	Antalya (TR)	0%
8 ^h	Montego Bay (JM)	-4%
9 th	Malaga (ES)	-10%
10 th	Male (MV)	-11%

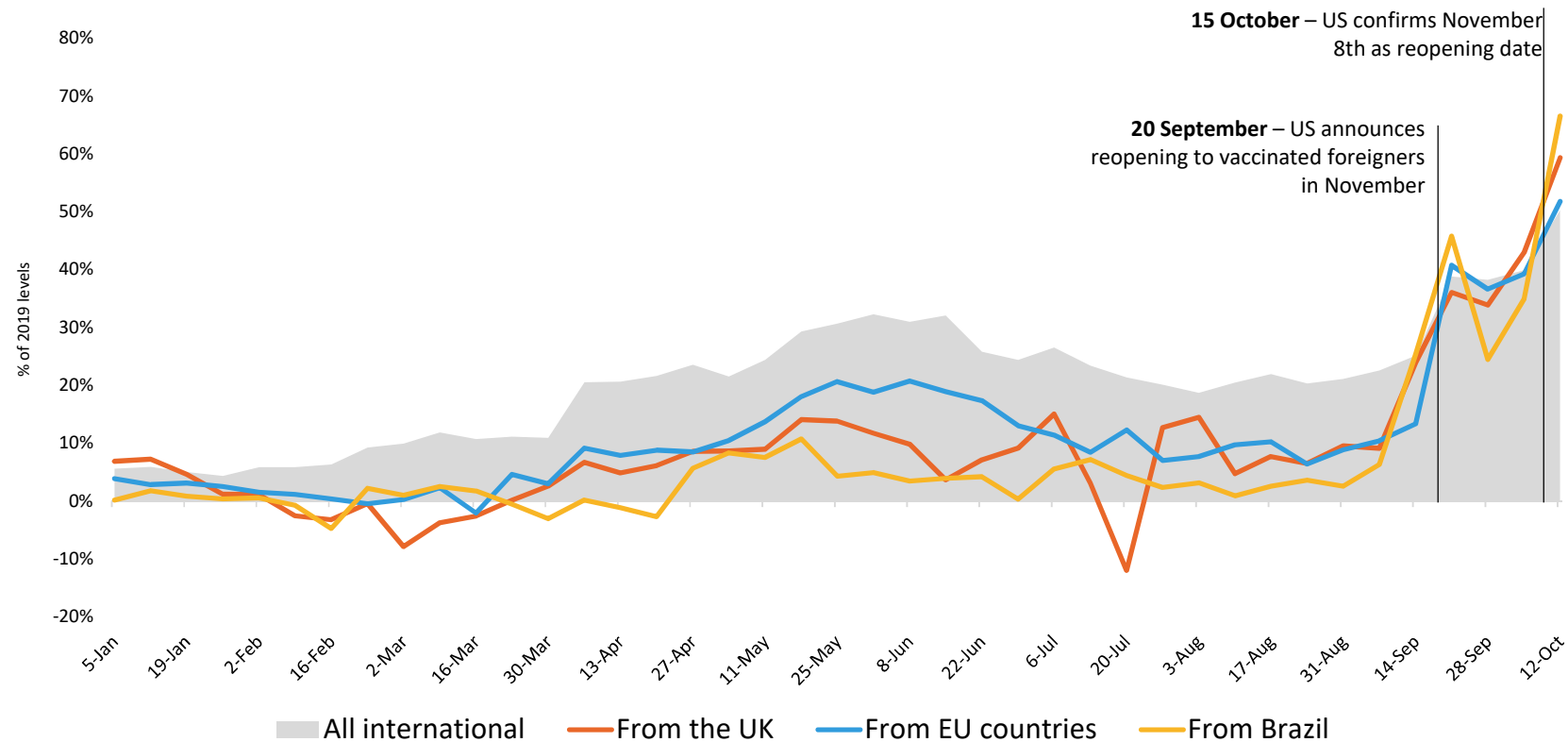
Key global source markets recover at different speeds

Performance of key global origin markets for international departures in October 2021 vs 2019

1 st	U.S.A.	-17%
2 nd	Norway	-28%
3 rd	Russia	-28%
4 th	Brazil	-37%
5 th	Spain	-40%
6 th	France	-45%
7 ^h	Sweden	-46%
8 ^h	Germany	-47%
9 th	United Arab Emirates	-51%
10 th	United Kingdom	-54%

Changes in travel restrictions continue to drive recovery

Bookings for international arrivals to the USA made from 5 January to 18 October 2021; % of 2019 volumes



Source: ForwardKeys Air Reservation Data




Check out the latest analysis at www.forwardkeys.com | #ForwardKeys

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Changes in travel restrictions continue to drive recovery

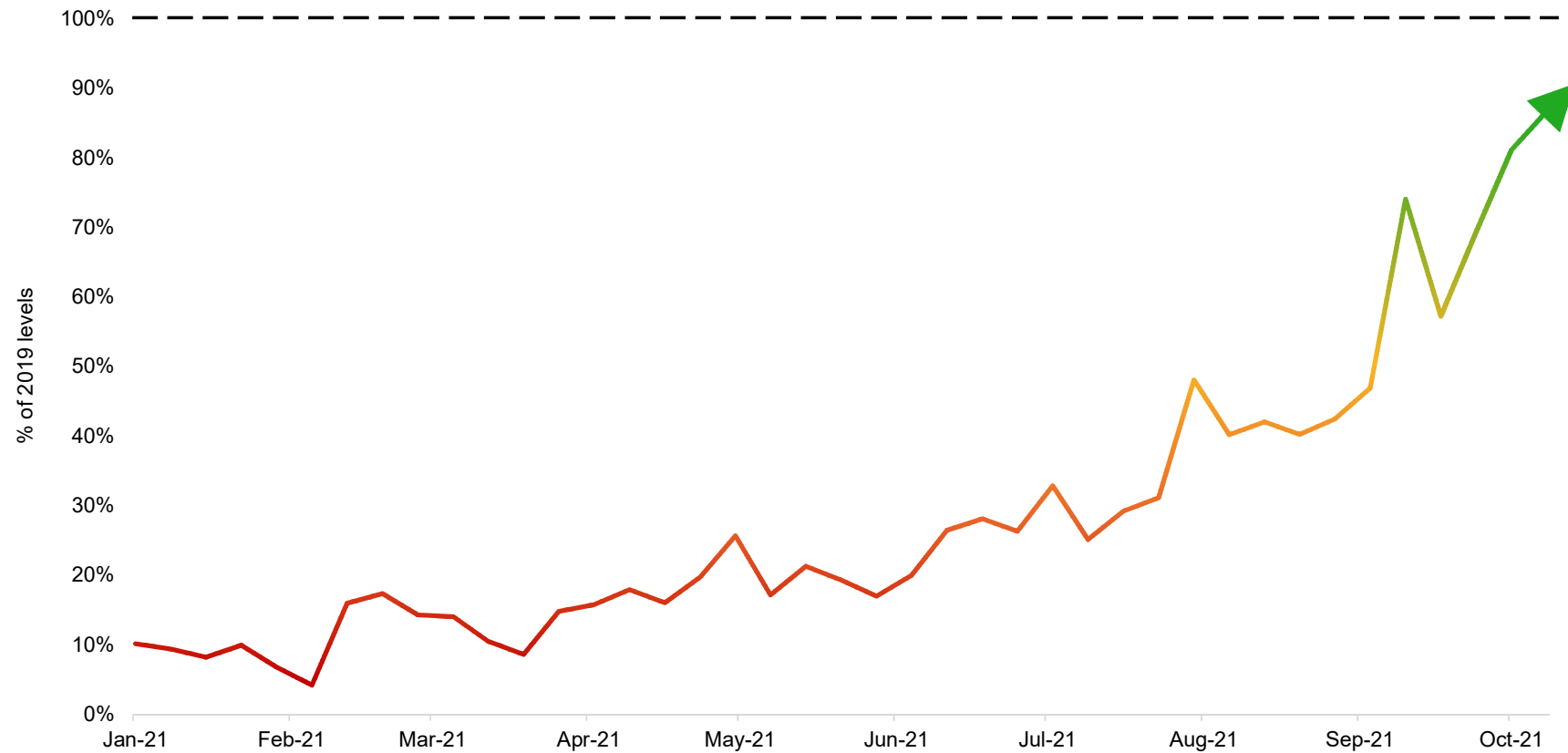
Week on week variations on bookings issued for future travel to the USA

Origin	21-27 Sep vs 14-20 Sep	12-18 Oct vs 5-11 Oct
United Kingdom	+83%	+15%
EU	+185%	+26%
Brazil	+71%	+100%

 Source: ForwardKeys Air Reservation Data

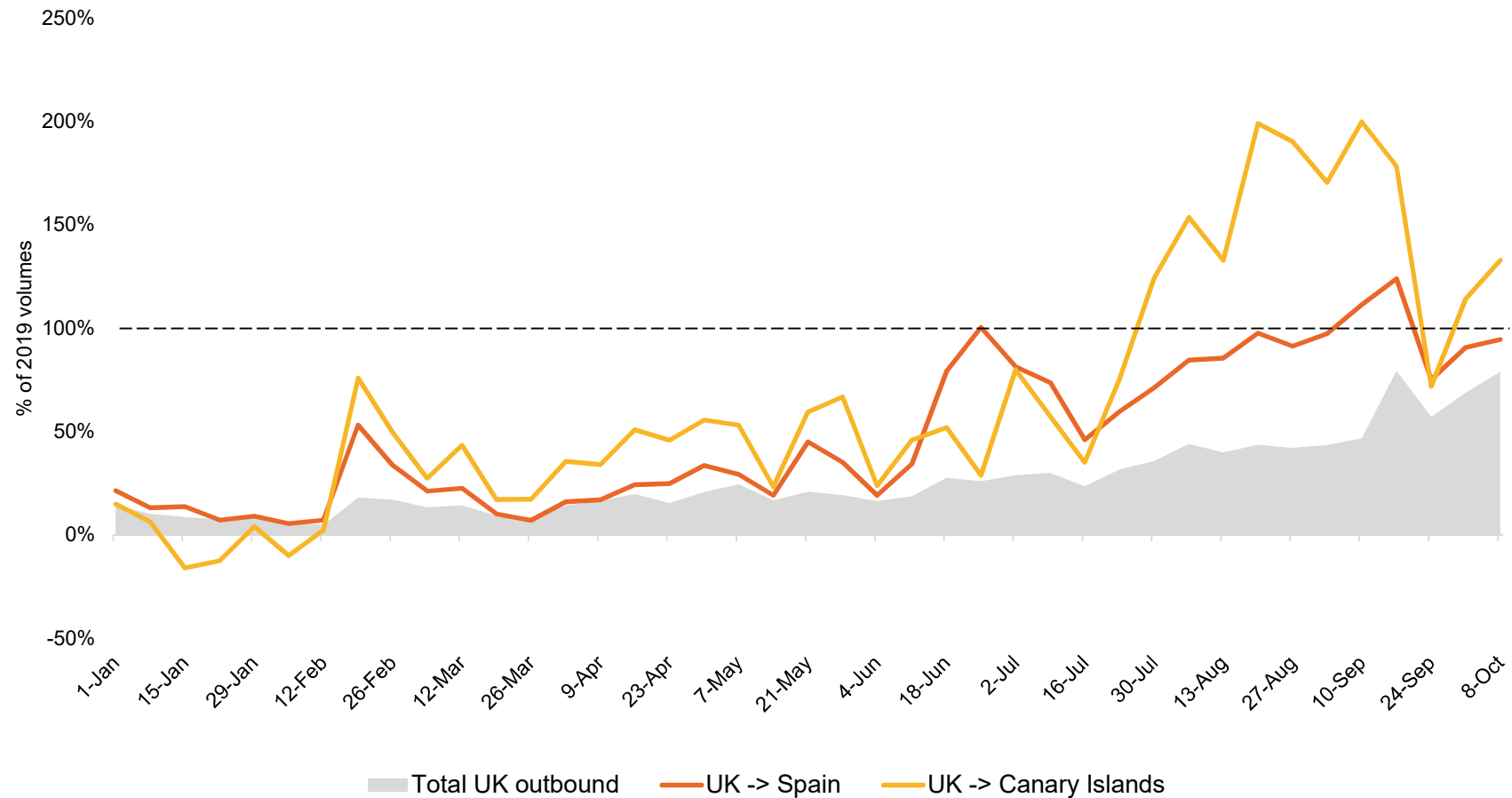
UK market on path to recovery as restrictions ease

Weekly tickets confirmed, from January to date, for any future international departure from the UK



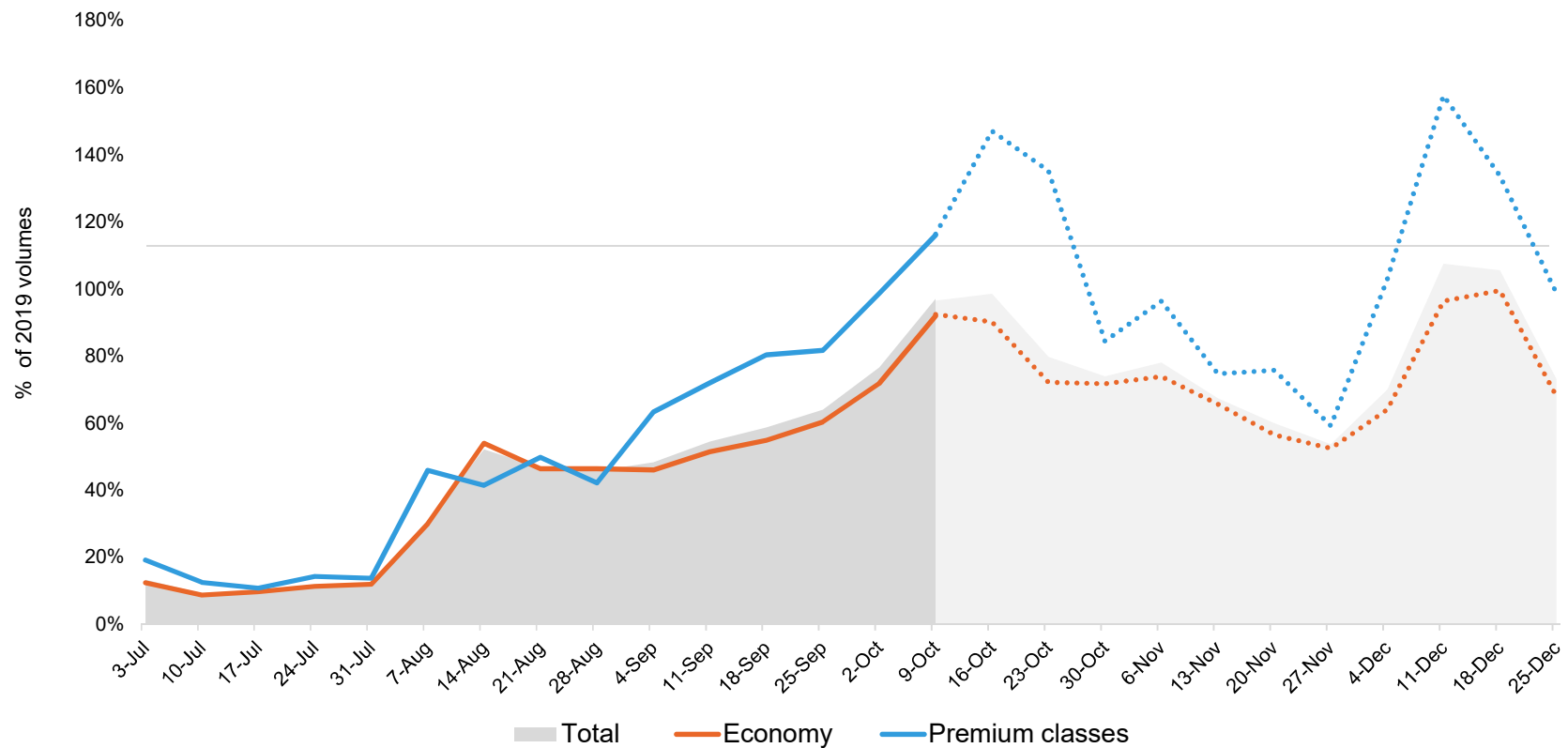
Traditional shorthaul destinations play key role in reactivation phase

Tickets issued in January - October 2021, for any future travel from the UK, vs same period in 2019



Premium class tickets lead recovery – London to Dubai

Arrivals from London to Dubai from 3 July to 31 December 2021, with bookings of 8 October 2021

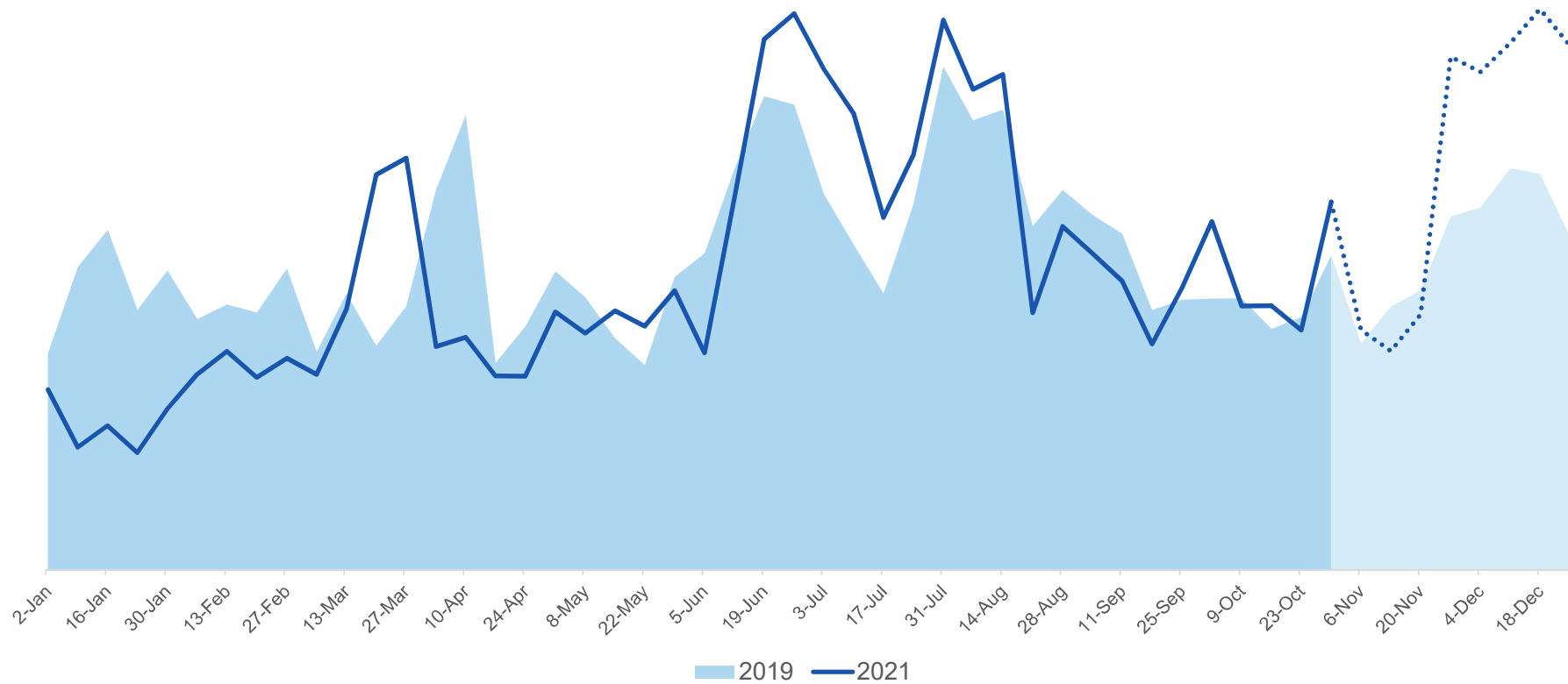


Source: ForwardKeys Air Ticket Data

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End of seasonality as we know it? – Spain to Dominican Republic

Arrivals from Spain to Dominican Republic in 2021, with bookings until 28 Oct 2021 vs 2019



Old and New – Key growing Destinations for Spanish tourists

Bookings for any future international departures from Spain, made in October 2021 vs 2019

Dominican Republic	+78%
Maldives	+73%
Iceland	+71%
Egypt	+34%
Qatar	+27%

Recovery will be uneven

Sun, Sea and Nature destinations set to thrive

Keep close eye on new markets and travel restrictions

Real time data to monitor rapidly evolving situation



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Head of Market Intelligence



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