

Impact of COVID-19 crisis on inbound air travel to the LATAM region

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03 June, 2020



ForwardKeys
PREDICTING TRAVELLERS' IMPACT

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

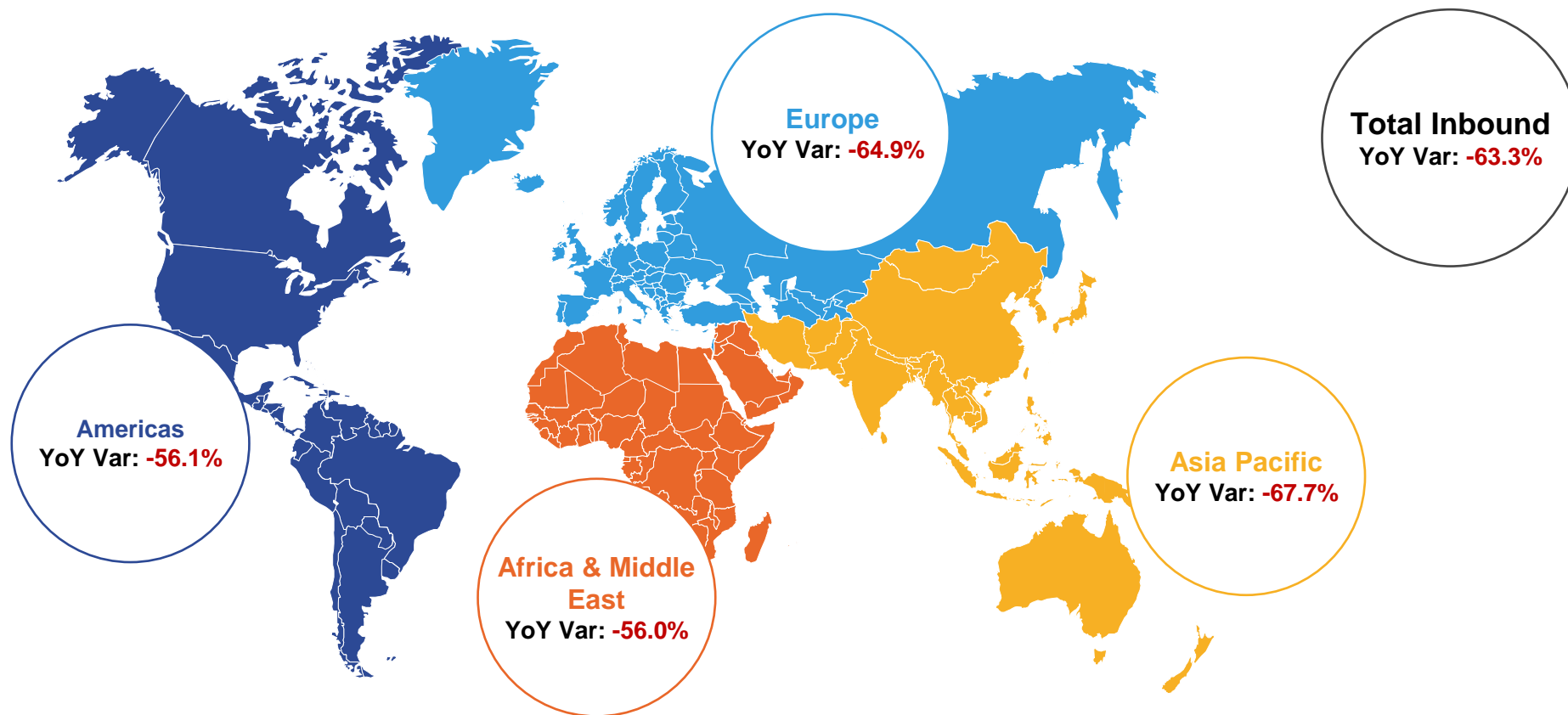
Total Air Market
Forecast



Worldwide arrivals show dramatic decline

Year to date arrivals to world regions *

01 January to 31 May 2020; Year-on-Year variations by region



* excluding domestic



Arrivals from 01 January to 31 May 2020 vs same period in 2019.



Only considered pax staying 1 to 21 nights at destinations.



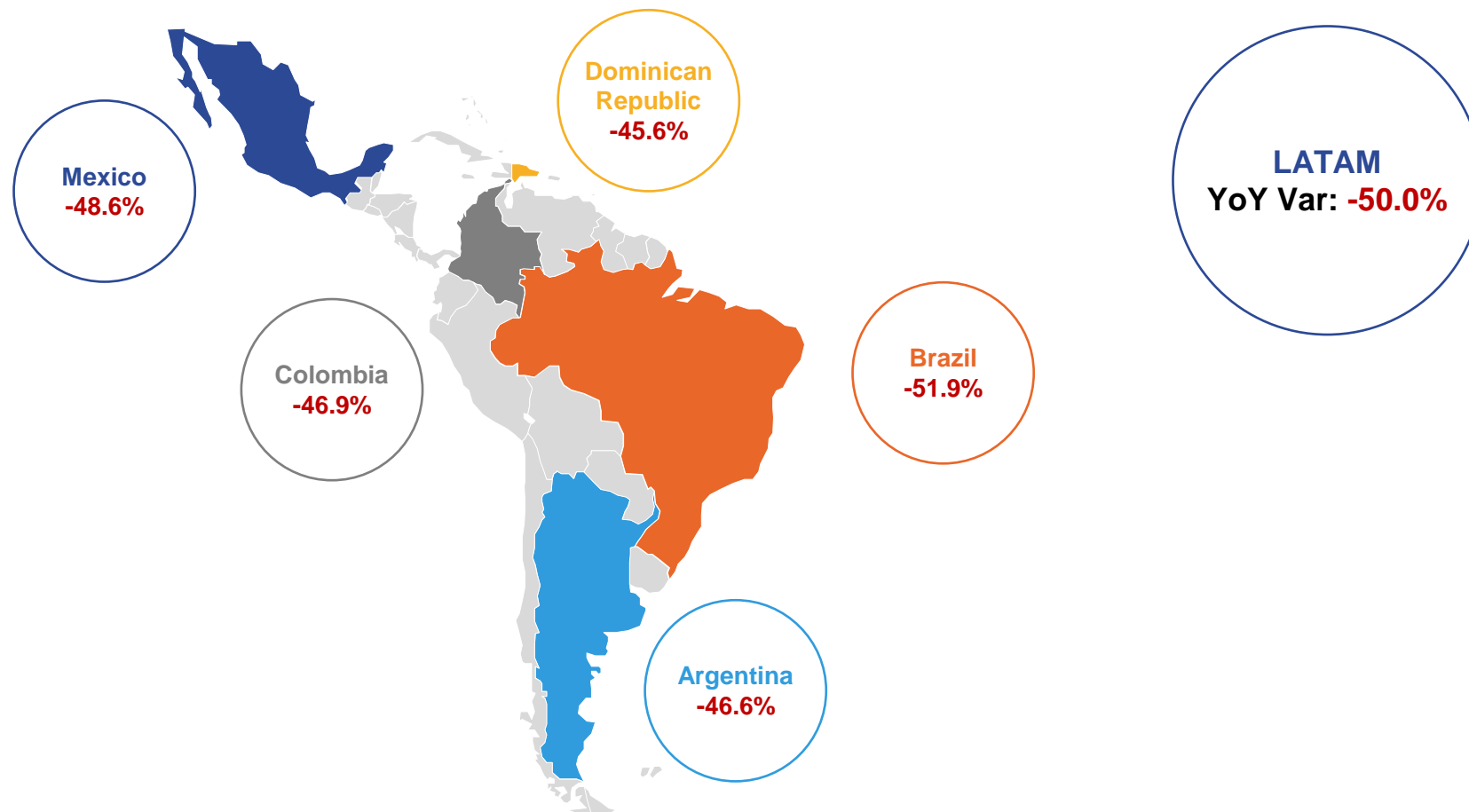
Source: ForwardKeys Air Reservation Data.

Long haul arrivals to LATAM halved year on year



Year to date long haul* arrivals to LATAM

01 January to 31 May 2020; Year-on-Year variations by region



* excluding InterAmerican travel



Arrivals from 01 January to 31 May 2020 vs same period in 2019.

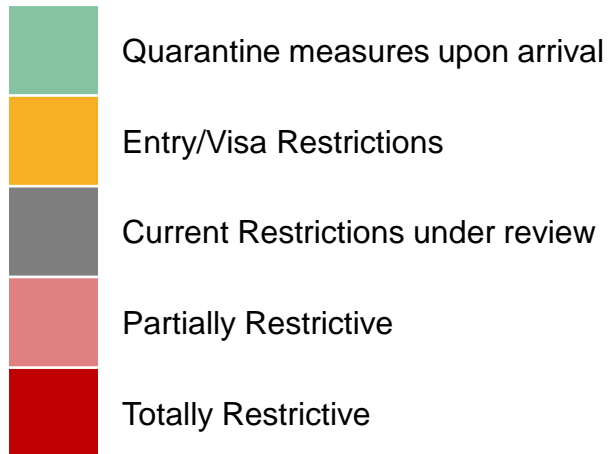


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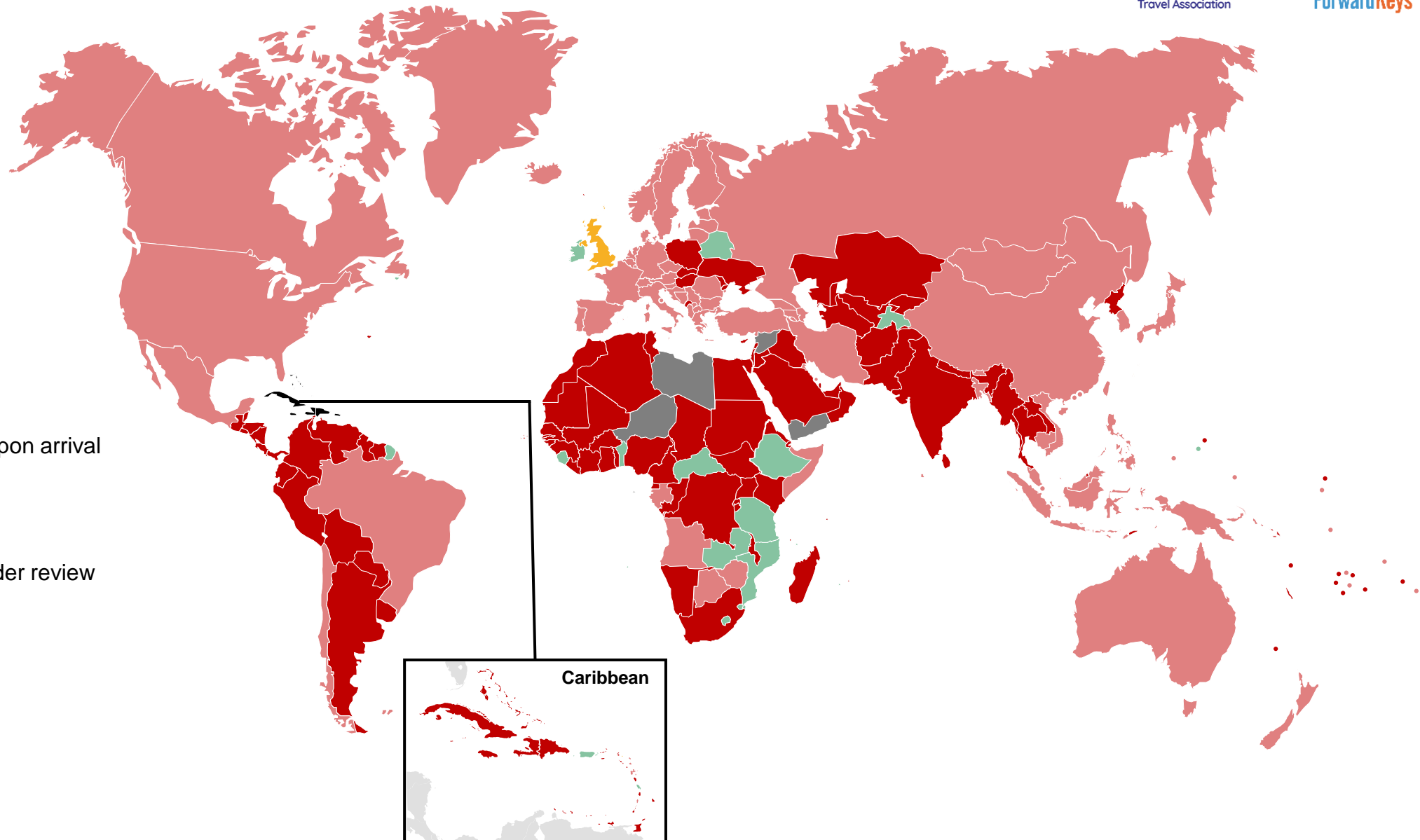


Source: ForwardKeys Air Reservation Data.

The current state of travel restrictions Worldwide



Source: IATA Timatic & British Foreign and Commonwealth Office.
Data as per 25 May 2020.

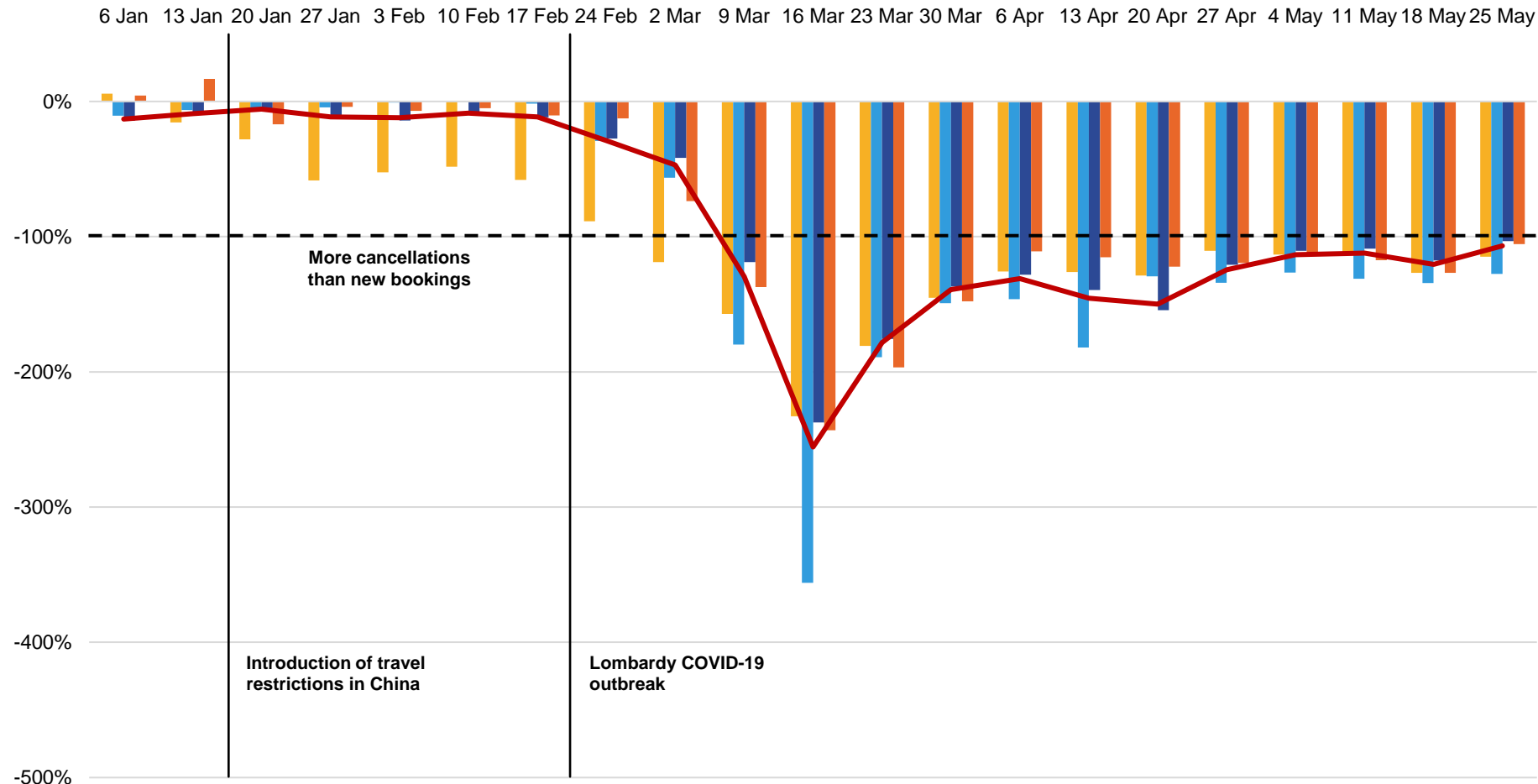


Future travel bookings to LATAM plummet by -82.7% since January...



Bookings made for International travel to LATAM by departure region

06 January to 31 May, Year-on-Year variations



Bookings made Year to date*

YoY % change

Asia Pacific	-101.9%
Europe	-86.2%
Americas	-81.4%
Africa & Middle East	-82.6%
Total Global	-82.7%

*Bookings made from 06 January to 31 May



Booking made from 6 January to 31 May 2020 vs same period in 2019 for future travel at any time.



Only considered pax staying 1 to 21 nights at destinations.



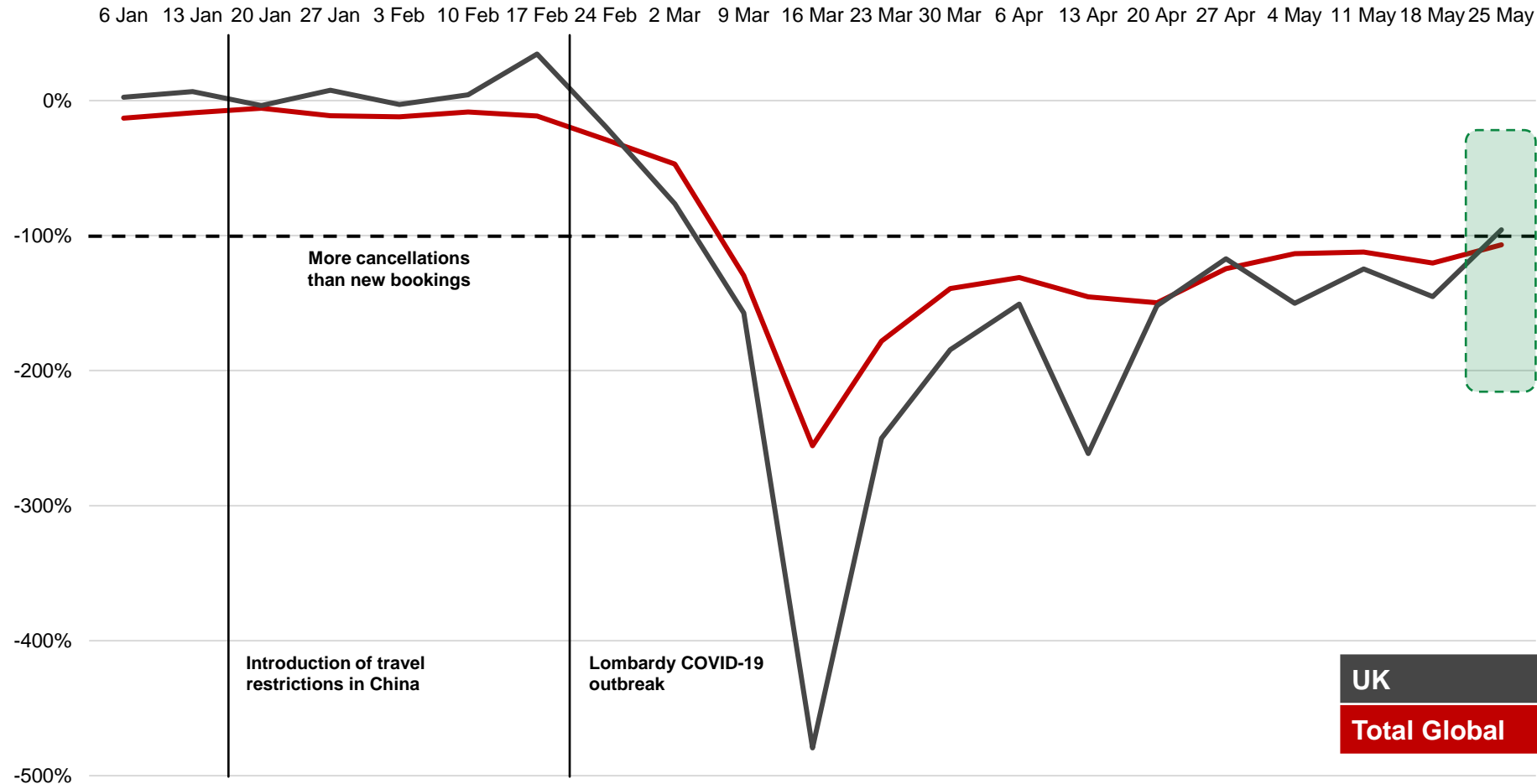
Source: ForwardKeys Air Reservation Data.

...but bookings from UK to LATAM show signs of a rebound



Bookings made for International travel to LATAM by departure region

06 January to 31 May, Year-on-Year variations



New weekly bookings from UK to LATAM outpace cancellations for the first time since early March!

-95.8%

YoY % change
w/c 25 May 2020



Booking made from 6 January to 31 May 2020 vs same period in 2019 for future travel at any time.



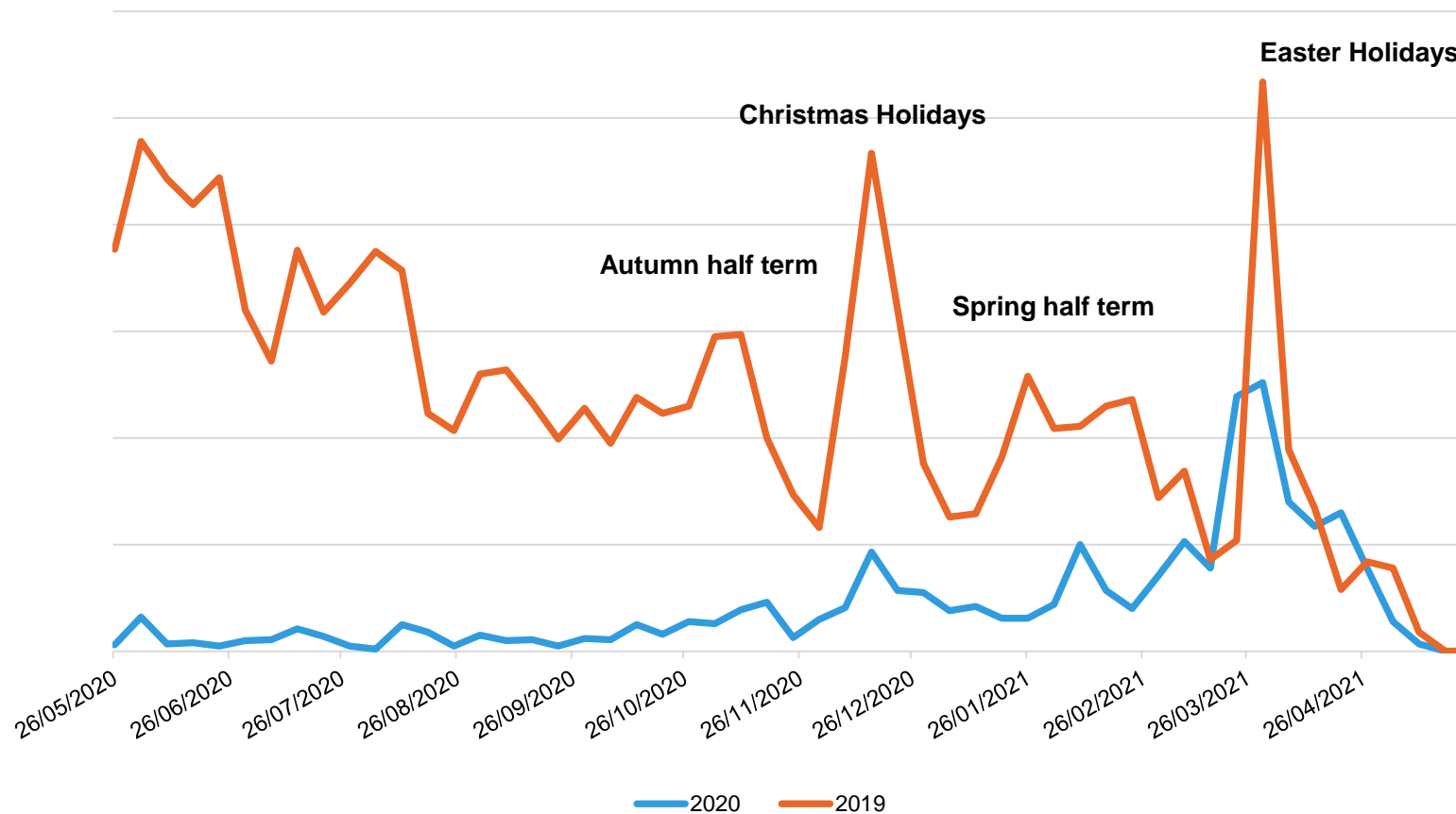
Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Reservation Data.

UK travellers booking for early 2021

Travel distribution for bookings made during w/c 25th May 2020



Bookings made from 25 to 31 May 2020 vs same period last year, for any future travel



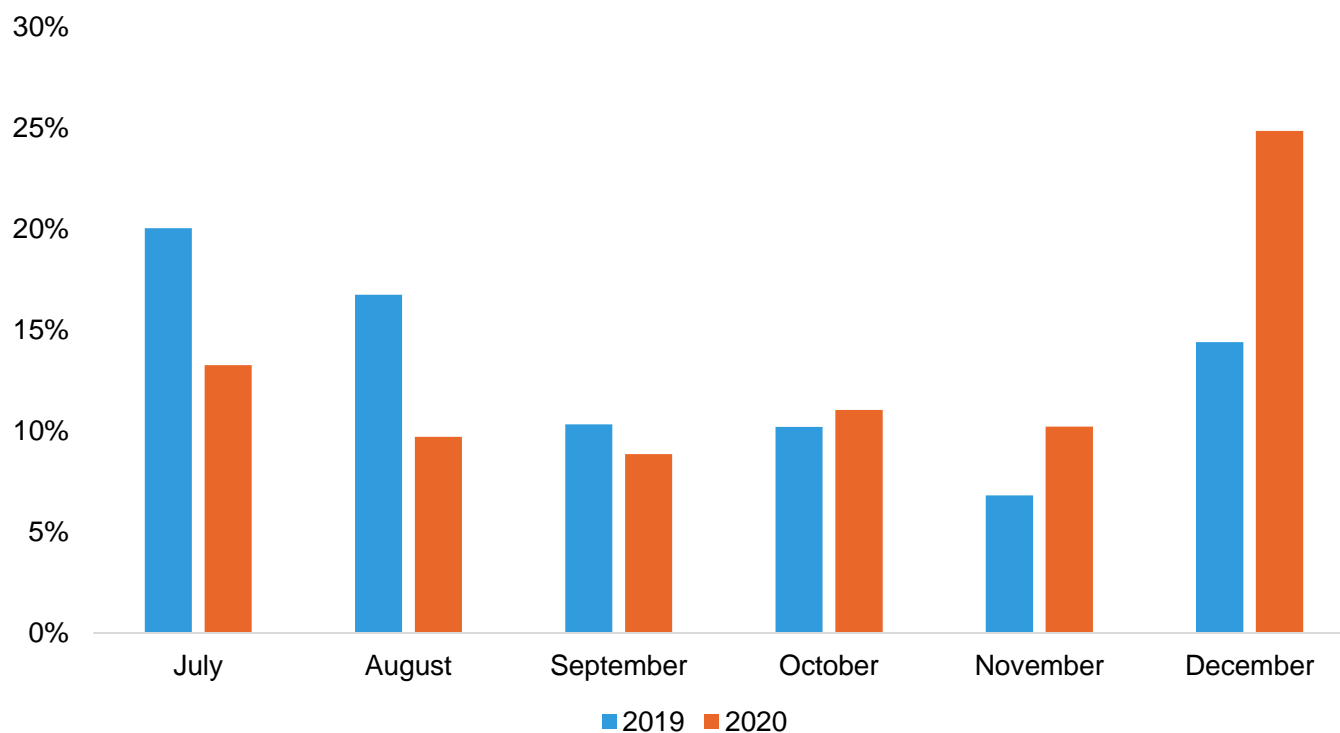
Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Reservation Data.

UK traveller's appetite for travel to LATAM shifts to Q4


Breakdown of flight searches from the UK to LATAM performed in May for a departure in...




Where to?

Top searched countries



 Flight searches from 1 to 31 May 2020 vs same period in 2019.

 Only considered pax staying 1 to 21 nights at destinations.

 Source: ForwardKeys Flight Search data.



Outlook



Top 5 LATAM inbound destination countries for long-haul travellers Q4 outlook

Top 5 LATAM inbound destination countries for long-haul travellers* – October, November & December 2020

	YoY % var	% Share
Mexico	-45.1%	19.0%
Brazil	-48.5%	11.4%
Peru	-48.6%	9.6%
Dominican Republic	-44.9%	8.3%
Argentina	-58.9%	12.7%

*Excludes interamerican travel



Bookings confirmed as 31 May 2020 vs same period last year, for travel in October – December 2020 vs travel in October – December 2019.



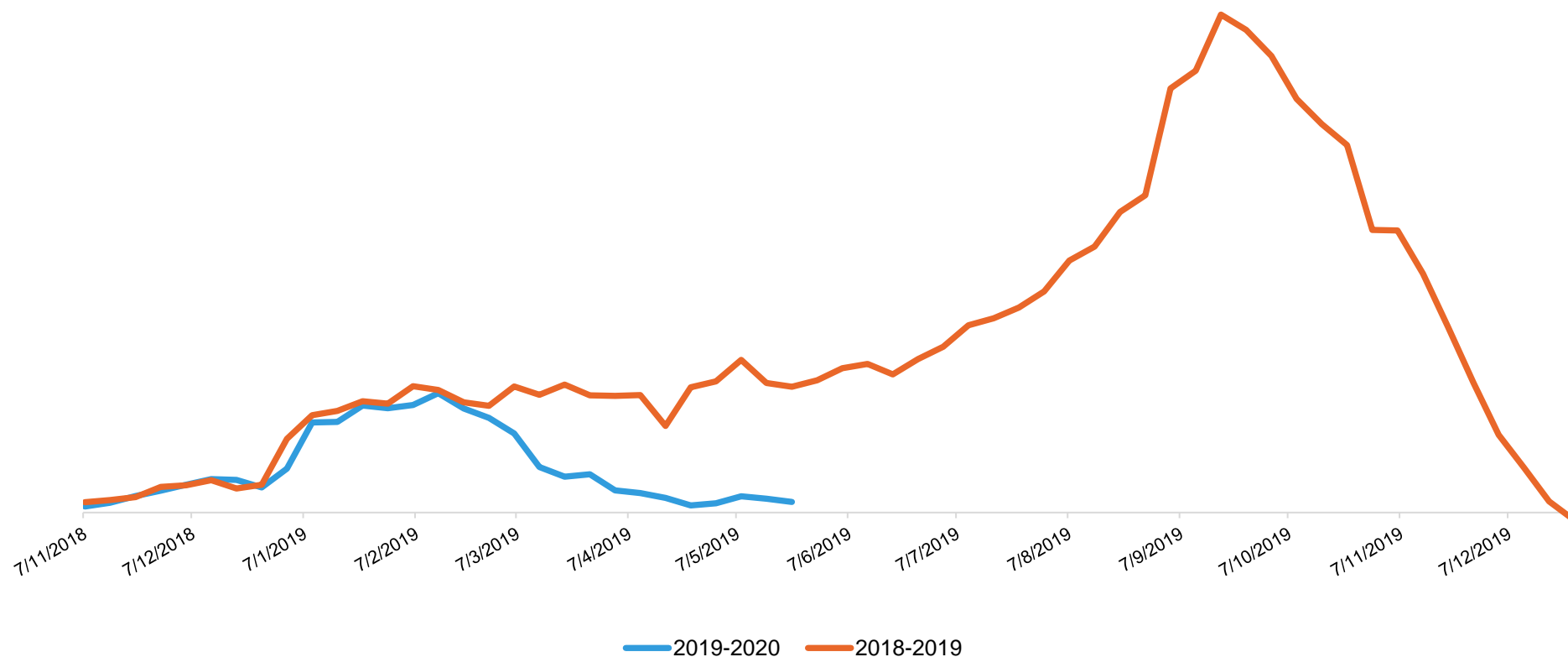
Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Reservation Data.

Long haul bookings for Q4 peak in September

Long haul flight bookings to the LATAM for travel in October, November and December



Bookings made from 1 October 2019 to 30 April 2020 vs same period last year, for travel in October – December 2020 vs travel in October – December 2019.



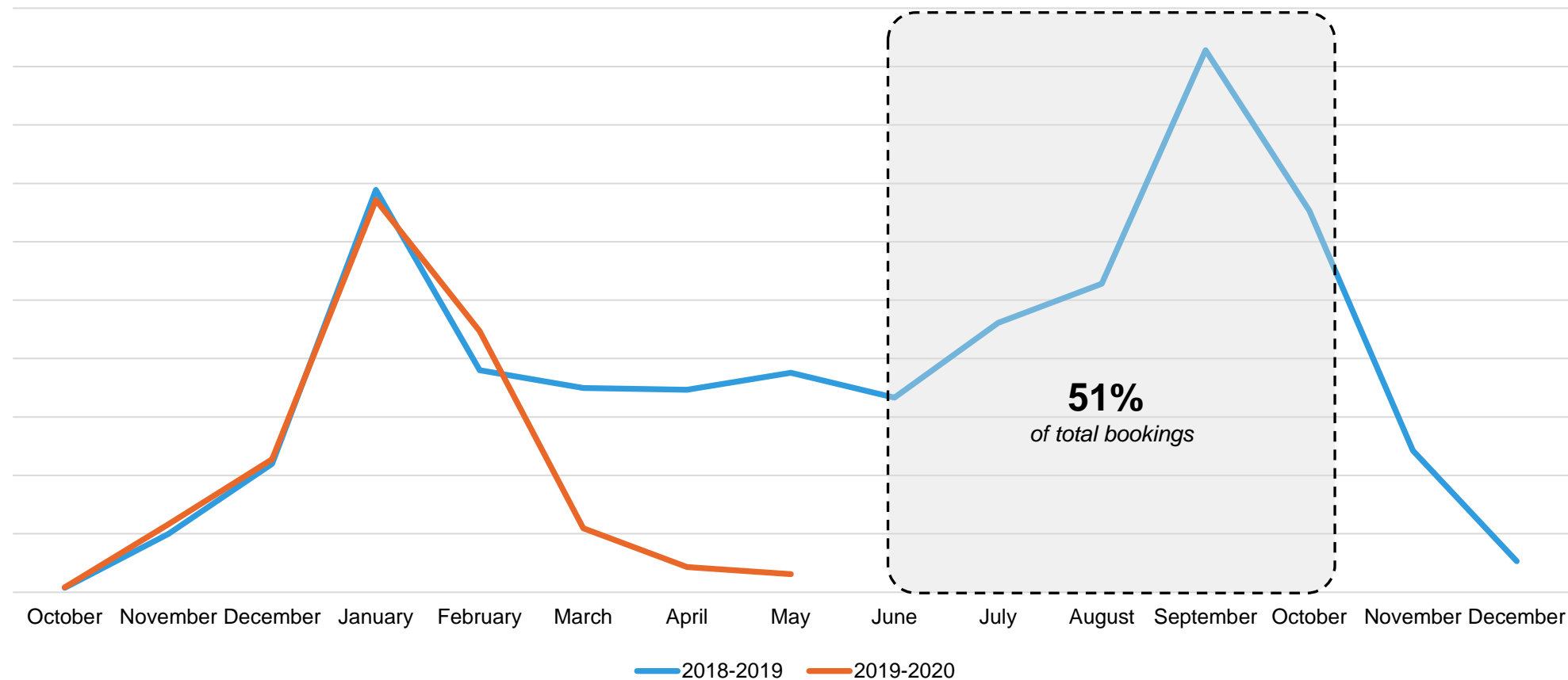
Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Reservation Data.

For UK travellers 51% bookings are made in June – October

Bookings from UK to LATAM for travel in October, November & December



Booking distribution for travelling from 1 October 2019 to 31 December 2019 vs same period in 2020.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys air reservation data.

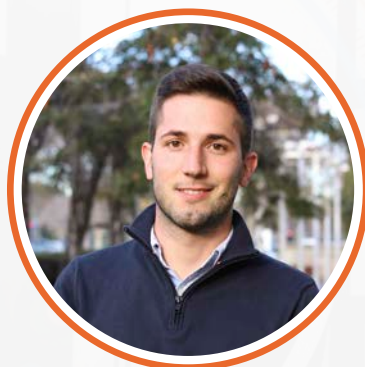
It is time to be data-driven





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GET IN CONTACT!



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