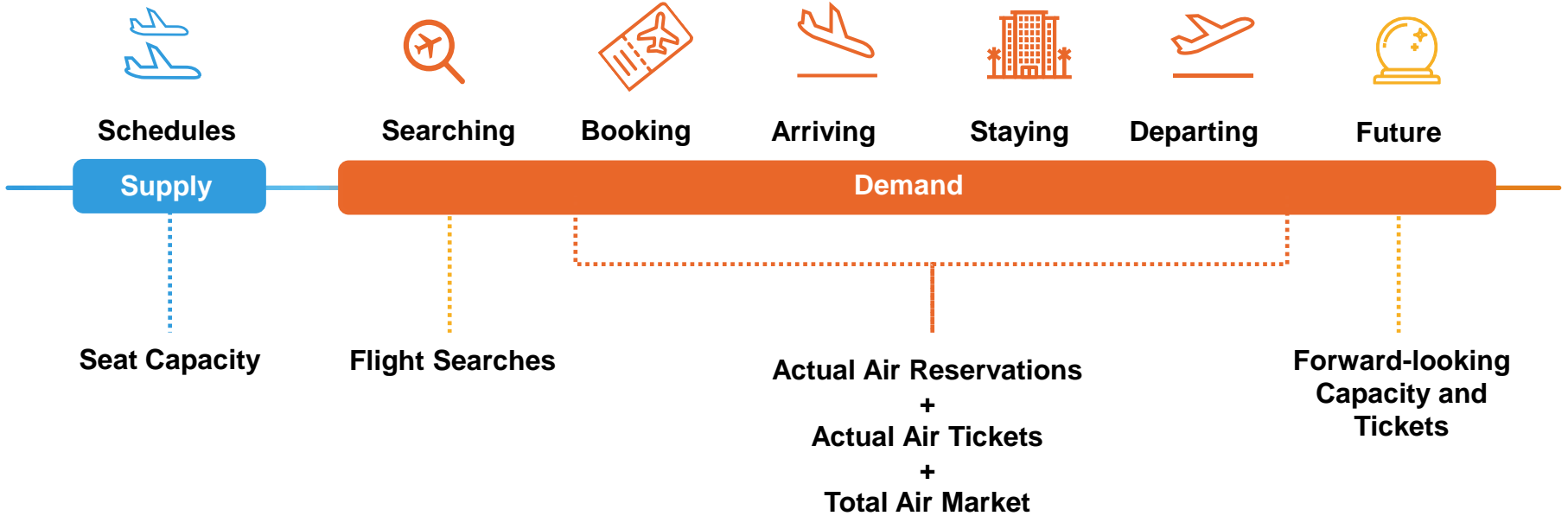


What's New in Chinese Outbound Travel

Nancy Dai, China Expert, ForwardKeys

26 April 2023

ForwardKeys data captures and reflects the entire traveller journey



Main Data partners



* Historic data



ForwardKeys

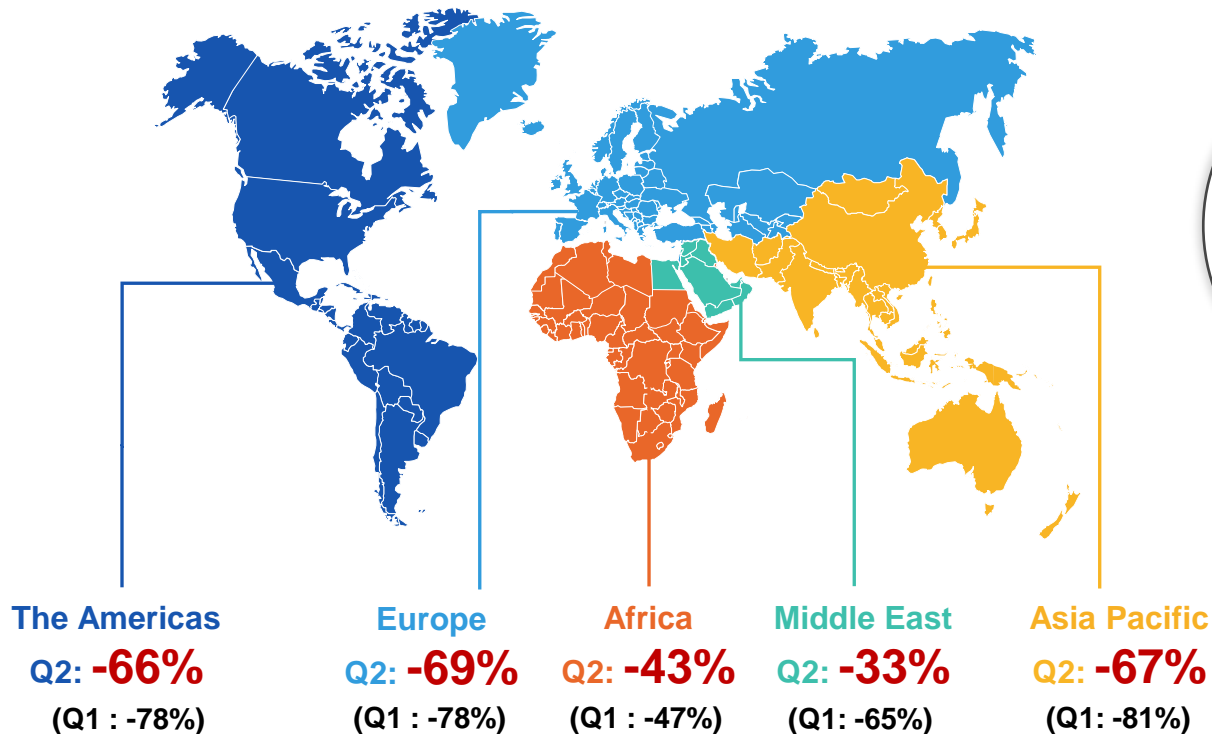
China Outbound Travel Trends

Forwardkeys.com
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The outlook for China outbound travel in Q2

Forward-looking International departures from China in Q2 2023; vs 2019



















Total China outbound
-64%
(Q1: -79%)

Source: ForwardKeys Actual Air Ticket Data

More relaxed entry rules, means faster recovery

Booked international departures from China between April and June 2023, as of 12 Apr 2023; vs 2019 levels

Most resilient destinations	Var vs 2019
  Macao	-13%
  United Arab Emirates	-43%
  Singapore	-48%
  Hong Kong	-49%
United Kingdom	-52%
Australia	-60%
  Vietnam	-60%
Canada	-63%
  Malaysia	-64%
  Thailand	-65%
TOTAL	-64%

 = Relaxed visa requirement
 = Group tours permitted

 Source: ForwardKeys Actual Air Ticket Data



ForwardKeys



Labour Day Holiday Travel

Forwardkeys.com
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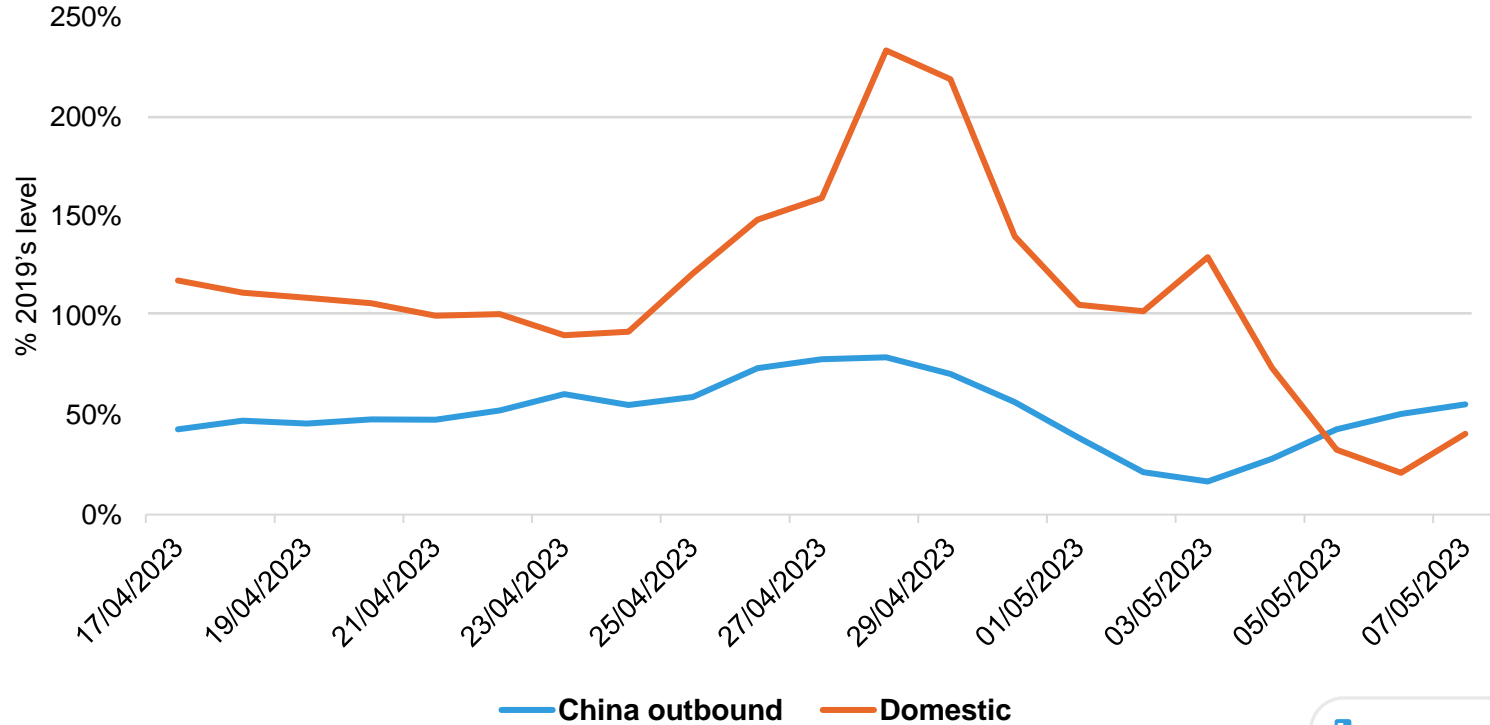
Labour Day holiday Calendar 2023

	S	M	T	W	T	F	S
April 2023	26	27	28	29	30	31	1
	2	3	4	5	6	7	8
	9	10	11	12	13	14	15
	16	17	18	19	20	21	22
	23	24	25	26	27	28	29
May 2023	30	1	2	3	4	5	6
	7	8	9	10	11	12	13
	14	15	16	17	18	19	20
	21	22	23	24	25	26	27
	28	29	30	31	1	2	3

-  Labour Day holiday
-  Extended holiday

Promising outlook for the Labour Day Holiday

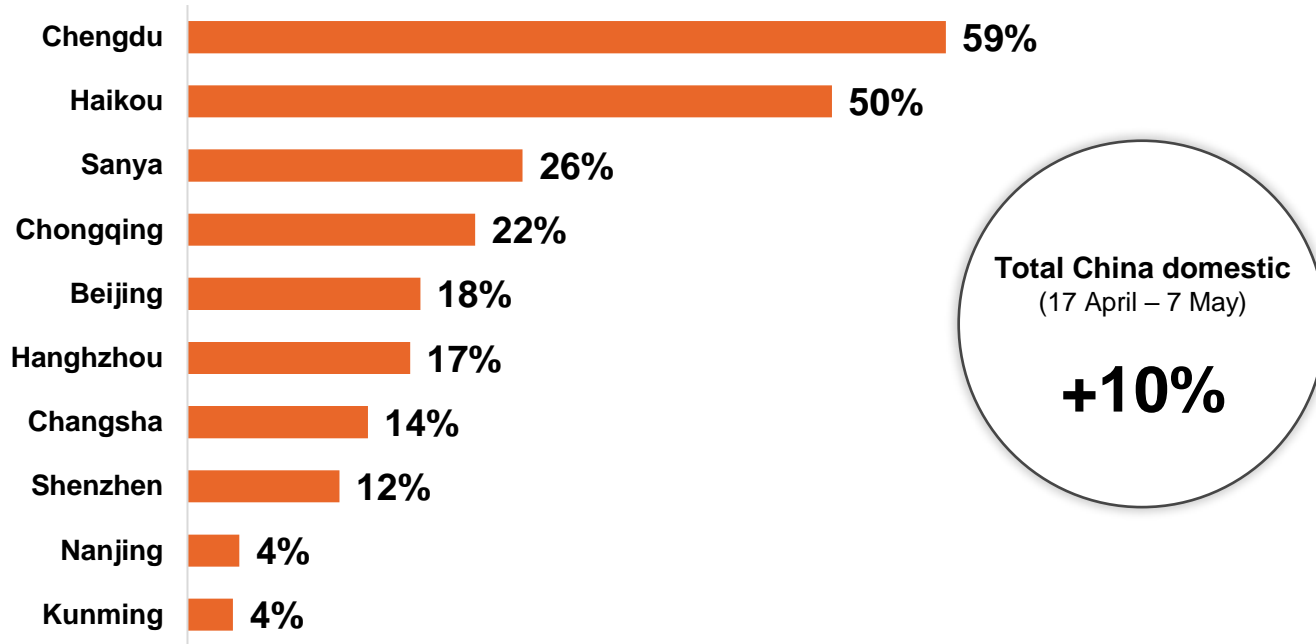
International departures from China between 17 April and 7 May 2023, as of 16 April 2023; % of 2019



Source: ForwardKeys Actual Air Ticket Data

China Domestic: Top cities for Labour Day Holiday

Domestic departures from China between 17 April and 7 May 2023, as of 16 Apr 2023; var% vs. 2019



Source: ForwardKeys Actual Air Ticket Data

Most Resilient destinations for Outbound China travel

International departures from China between 17 April and 7 May 2023, as of 16 Apr 2023; var% vs. 2019

Most resilient destinations* in Asia	Var vs 2019
Macau	+11%
Jakarta	+9%
Hanoi	-15%
Male	-16%
Ho Chi Minh City	-30%
Phnom Penh	-31%
Hong Kong	-32%
Kuala Lumpur	-32%
Singapore	-34%
Phuket	-47%
TOTAL ASIA	-55%

Most resilient destinations* outside Asia	Var vs 2019
Cairo	+9%
Dubai	-6%
London	-21%
Milan	-25%
Melbourne	-33%
Moscow	-36%
Frankfurt	-37%
Auckland	-38%
New York City	-47%
Sydney	-48%
TOTAL OUTSIDE ASIA	-50%

* Market share > 1%

Source: ForwardKeys Actual Air Ticket Data



ForwardKeys

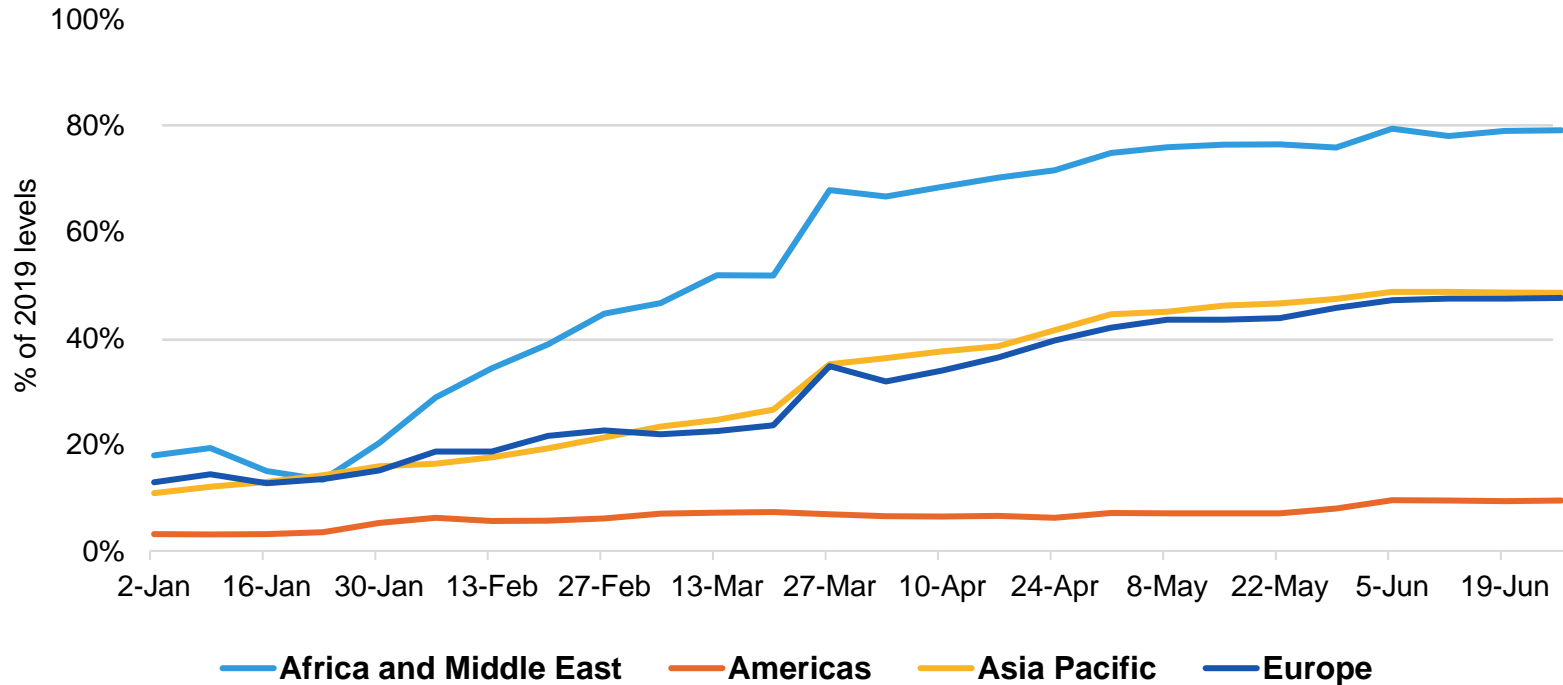
China Outbound - Travel Connectivity

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Increased seats in Q2 for China Outbound travel

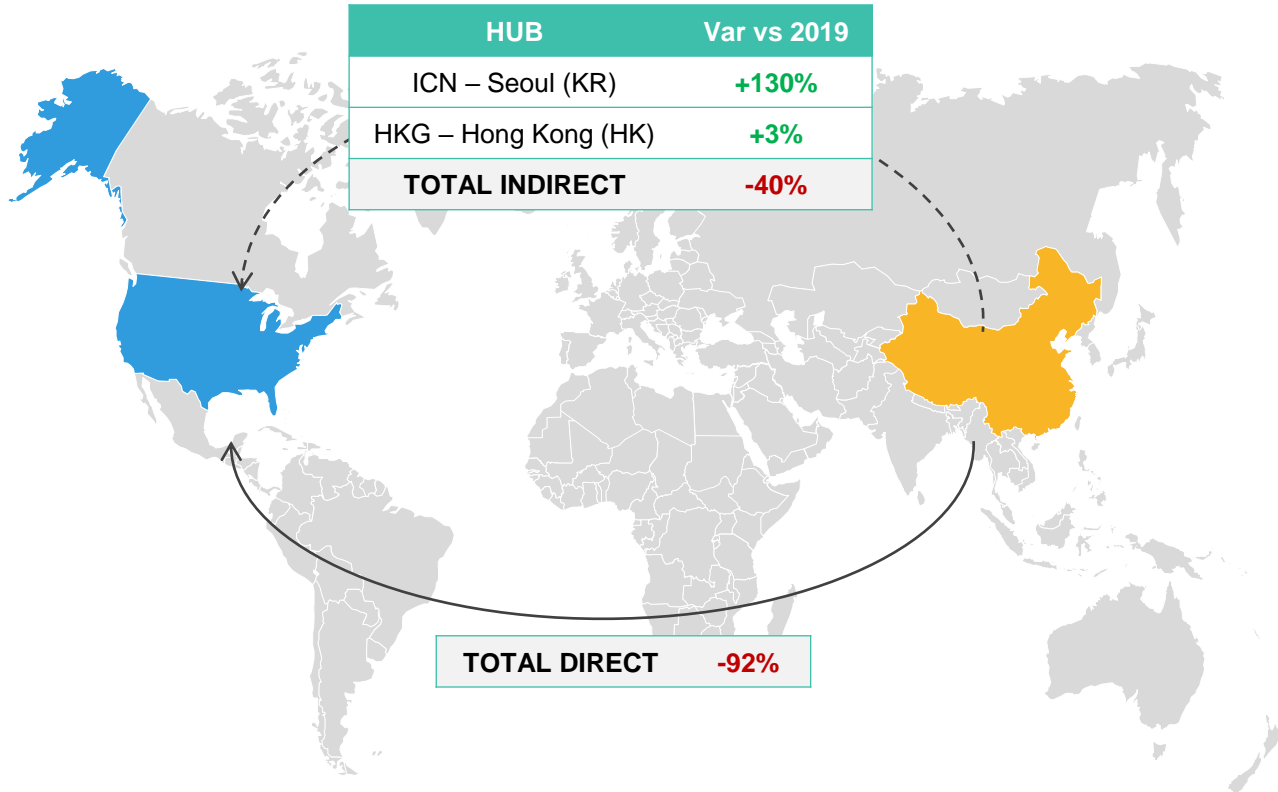
Capacity for international departures from China between Jan and Jun 2023, as of 17 Apr 2023; vs 2019 levels



Source: ForwardKeys Seat Capacity Data.

ICN and HKG are vital for connecting China with the US

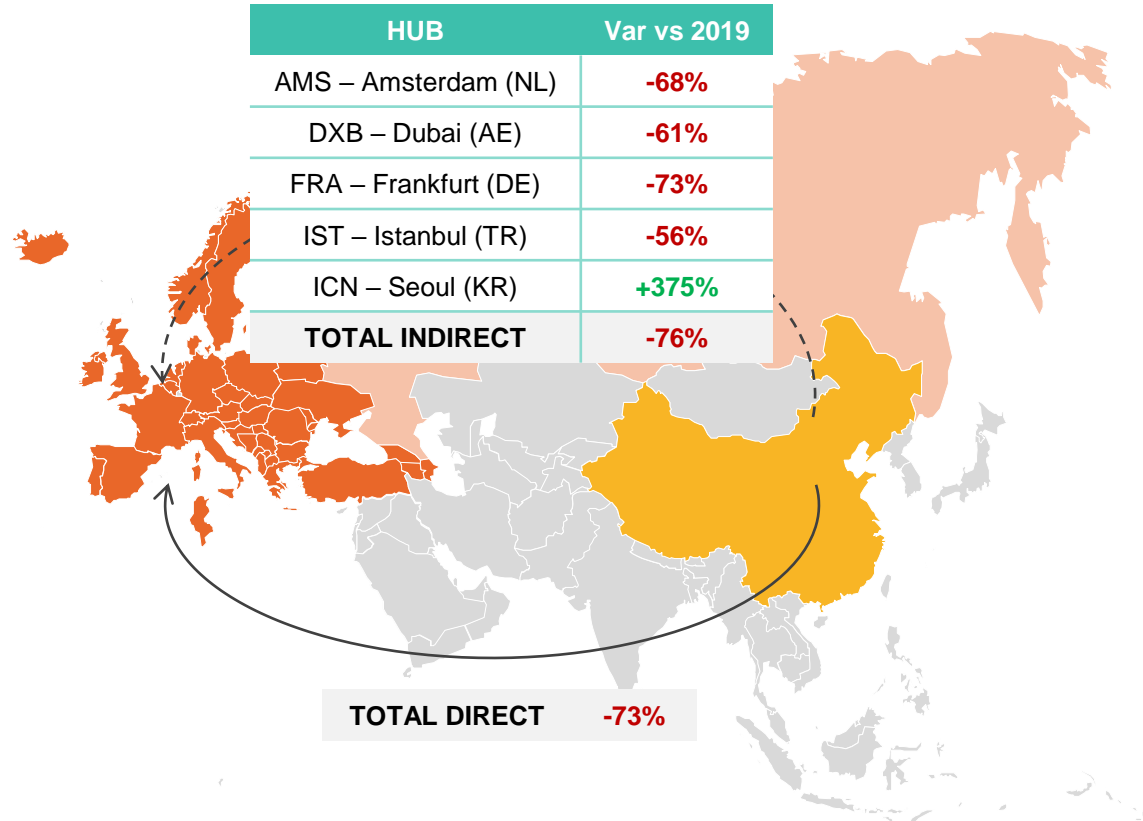
Arrivals from China in the US in H1 2023, as of 13 Apr 2023; vs same period in 2019



Source: ForwardKeys Actual Air Ticket Data

Top Airport Hubs for China - Europe travel

Issued flight tickets for travel from China to Europe in H1 2023, as of 13 Apr 2023; vs same period in 2019



Source: ForwardKeys Actual Air Ticket Data



ForwardKeys

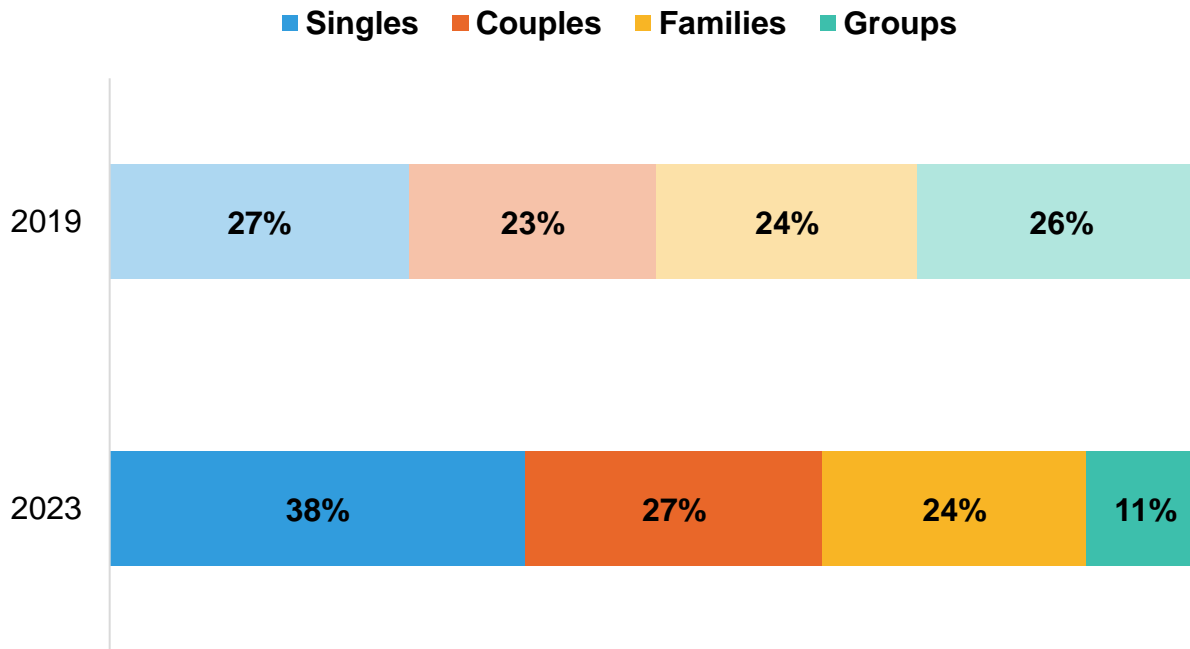
Changes – Passenger Profile

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Individuals and couples are the first to reactivate travel

International departures from China in H1 2023, as of 13 Apr 2023; vs same period in 2019

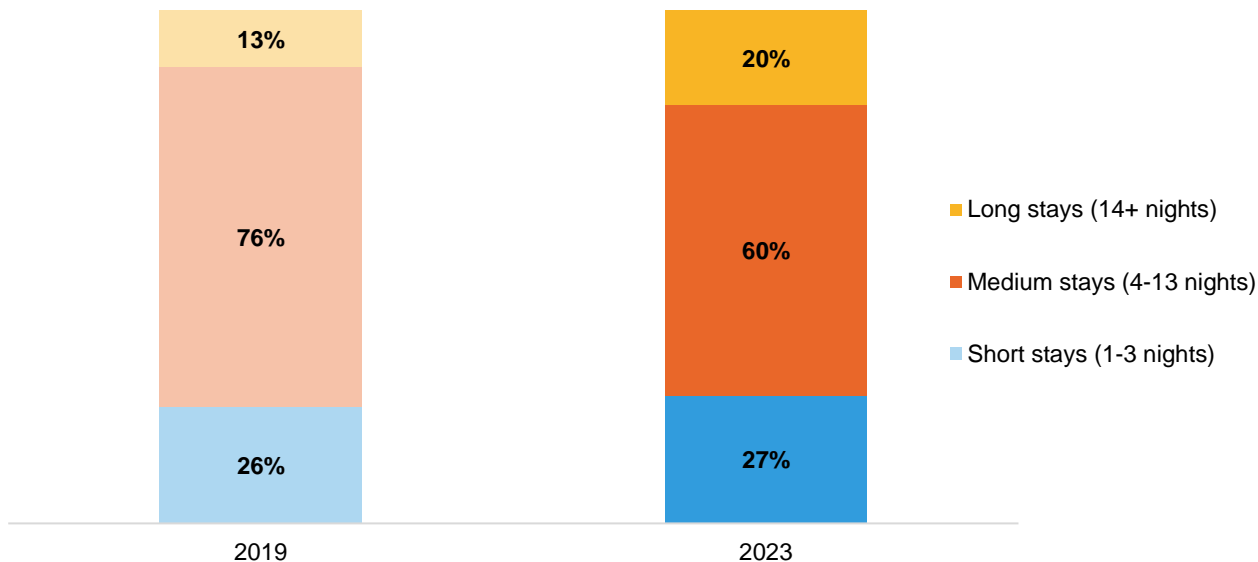


Source: ForwardKeys Actual Air Ticket Data

Chinese travellers are opting for longer stays at destinations

International departures from China in H1 2023, as of 13 Apr 2023; vs same period in 2019

Length of stay (excl. one-way trips)



Source: ForwardKeys Actual Air Ticket Data

Take-Aways

1

Chinese outbound travel is expected to improve in Q2, with destinations that have relaxed entry rules expected to recover fastest.

Take-Aways

2

The outlook for the Labour Day holiday shows domestic travel 10% ahead, while outbound travel are around 50% behind. Sun and sea destinations, along with certain niche markets, are becoming increasingly popular.

Take-Aways

3

Transfer airport hubs will become a key aspect of China's outbound recovery; South Korea is a particularly important gateway.

Take-Aways

4

The first to resume traveling are solo travellers and couples; Chinese travellers are staying longer at destinations.



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