

Leading up to the holiday season, ForwardKeys shares valuable insight

Recently revealed by ForwardKeys, data below shows the expected top transit hubs for international travel in December. Based on confirmed tickets as of November 17, 2021, the chart compares December 2019 to December 2021, and sees Frankfurt/FRA take over the top spot from Dubai/DXB, which has dropped to third position. Additionally, the following graph displays seat capacity of worldwide international arrivals from December 1 - 30, 2021.



Top Transit Hubs for International Travel in December

Tickets confirmed as of 17 November 2021, for international transits from 1 to 31 December 2021; vs 2019

| December 2019 | | December 2021 | | |
|-----------------|---------------|-----------------|-----------------|------|
| 1 st | Dubai/DXB | 1 st | ▲ Frankfurt/FRA | -24% |
| 2 nd | Frankfurt/FRA | 2 nd | ▲ Amsterdam/AMS | -29% |
| 3 rd | Amsterdam/AMS | 3 rd | ▼ Dubai/DXB | -56% |
| 4 th | Doha/DOH | 4 th | ▬ Doha/DOH | -27% |
| 5 th | Istanbul/IST | 5 th | ▬ Istanbul/IST | -25% |

Source: ForwardKeys Air Ticket data.

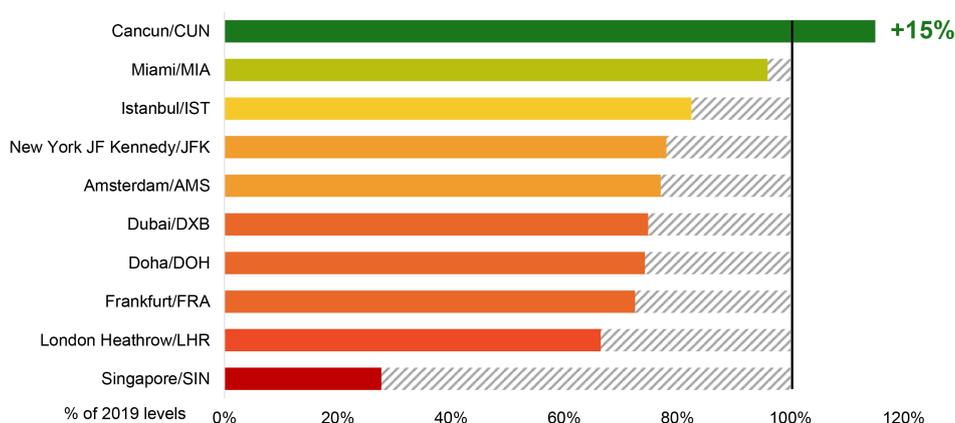
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Below, see commentary by Juan Gomez Garcia, Head of Market Intelligence at ForwardKeys:

- At the height of the pandemic, a vast number of flights in & out of Dubai were suspended, while competing hubs like Doha and Istanbul largely remained open
- This suspension of flights led to Dubai losing its top spot as the biggest connecting hub in the world; however, as the UAE has begun to re-open and ease travel restrictions, we can expect to see Dubai attempt to regain its position
- Due to uncertainty regarding travel restrictions and the subsequent slow recovery of long-haul travel, hubs such as Doha, Dubai and Istanbul, which are highly dependent on this type of travel, have either slipped (in the case of Dubai) or remained stagnant in the ranking compared to November 2019

December International Seat Capacity at Key Global Airports

Seat capacity for Worldwide International arrivals from 1 to 31 December 2021



Source: ForwardKeys Seat Capacity data

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According to the leading provider of comprehensive data, ahead of the holiday season, seat capacity is expected to increase between November - December 2021 by 15% worldwide. Note the following list of highlights:

- There is expected to be significant VFR+Expat traffic – especially in North America and Europe; airlines are preparing for this anticipated demand
- As uncertainty regarding travel restrictions continues to impact the globe, capacity adjustments mainly cater to regional travel – as opposed to long-haul
- The biggest increase on this list of 10 key global airports is Miami, which gains +25% from November vs. December 2021
- Cancun is expected to exceed 2019 levels by 15%, which is reflective of strong demand from US leisure PAX, who are opting to travel regionally to escape winter weather