



Air passenger trends for Middle East and Africa

MEADFA Conference

January 2018



**KNOW
TOMORROW'S
TRAVELLERS**

30.238.647

Travellers monitored each day



**KNOW WHAT'S
HAPPENING
RIGHT NOW**

80.125

Daily flights monitored



**CASH IN, SEIZE THE
OPPORTUNITY**

17.234.787

Booking transactions a day



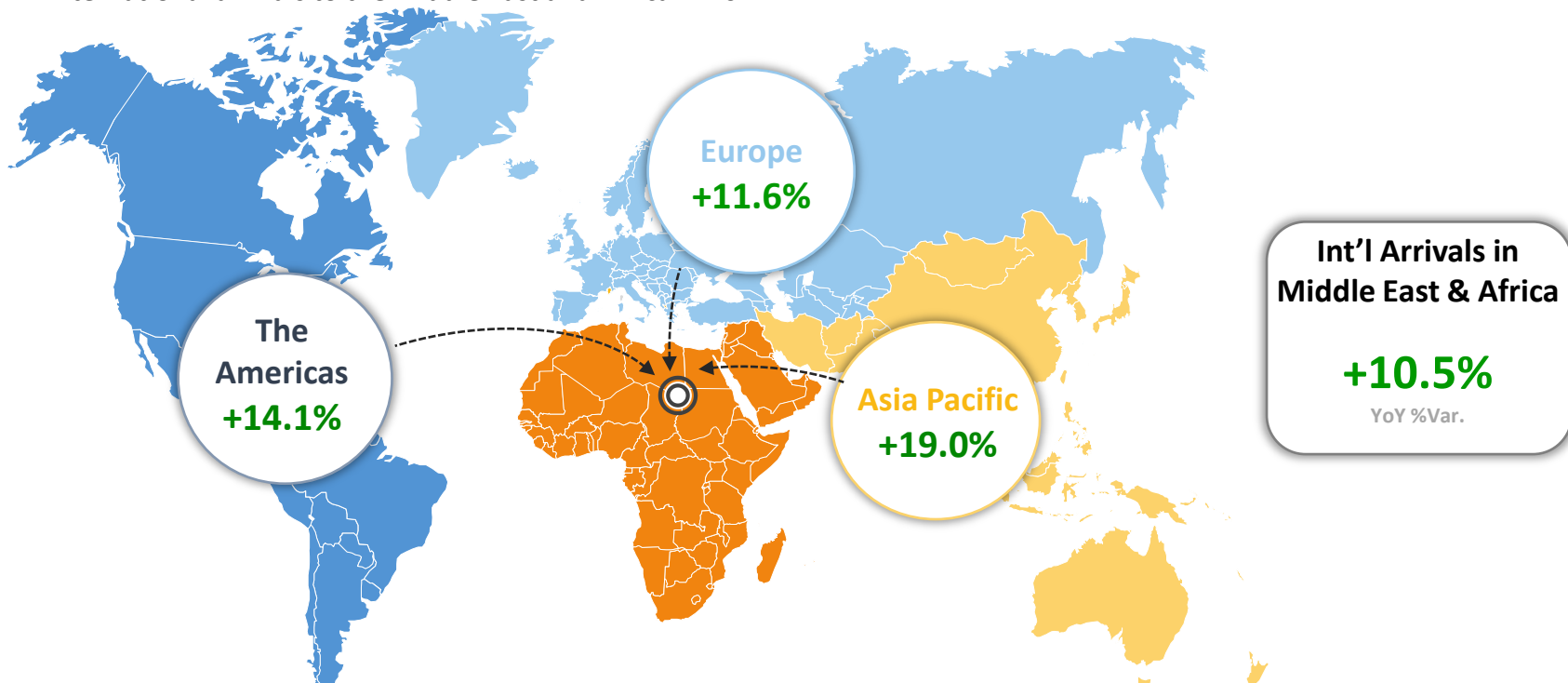
**ZERO IN
ON WHAT REALLY
MATTERS**



#1 Middle East & Africa air travel trend in 2017

International arrivals in Middle East and Africa consolidated recovery in 2017

International arrivals to the Middle East and Africa in 2017



International arrivals from January 1st to December 31st 2017 vs. same period in 2016.



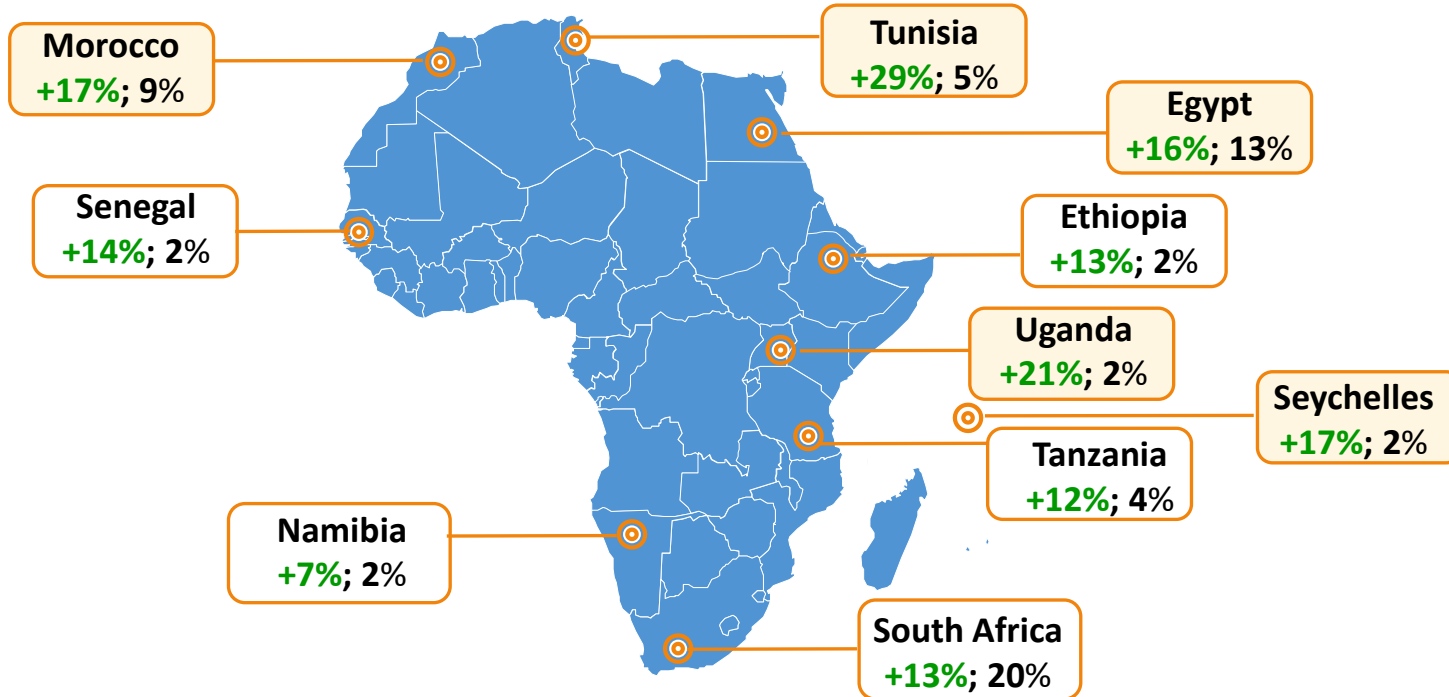
Only considered visitors staying 1 to 21 nights. Excluded one way trips, day trips and transfers.



Geographic categories follow UNWTO definitions.

Africa: inbound growth welcomed by both traditional and rising destinations

International arrivals in top destination countries in Africa in 2017, YoY %Var.



International arrivals from January 1st to December 31st 2017 vs. same period in 2016.



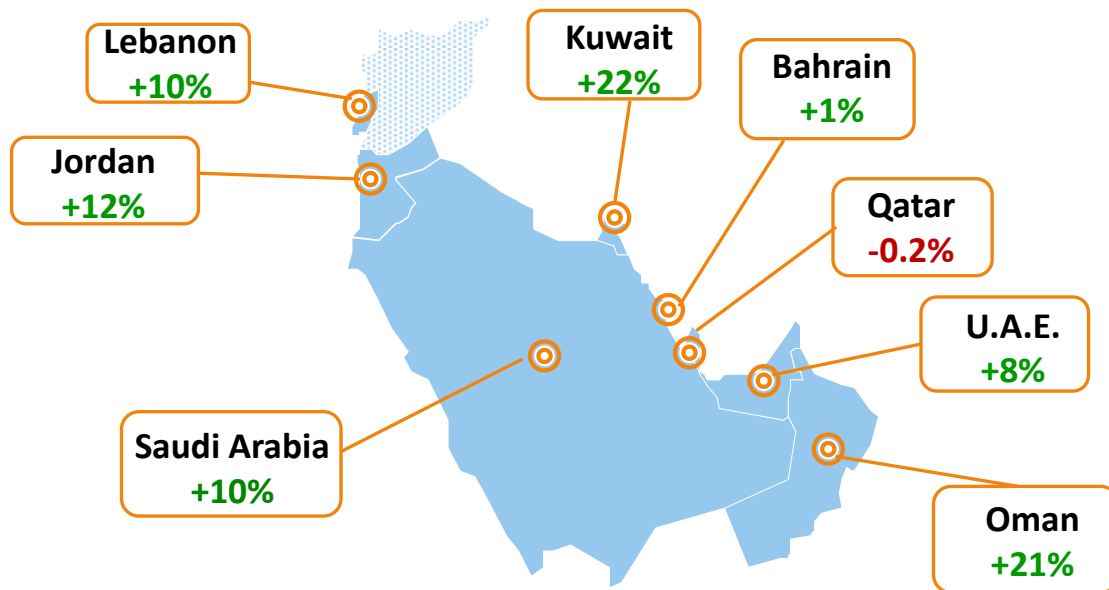
Only considered visitors staying 1 to 21 nights. Excluded one way trips, day trips and transfers.



Africa including Egypt.

Middle East: robust arrival growth for all, except Qatar

International arrivals in top destination countries in Middle East in 2017, YoY %Var



International arrivals from January 1st to December 31st 2017 vs. same period in 2016.



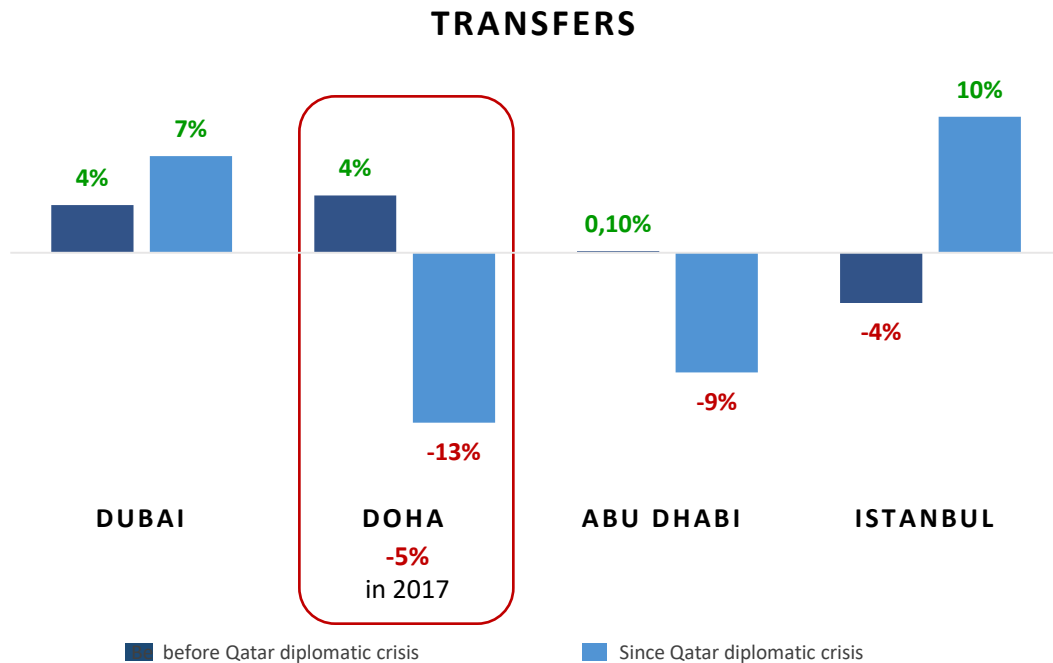
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Geographic categories follow UNWTO definitions.

Super connectors: Dubai and Istanbul grew during crisis in Doha

International traffic through Dubai, Abu Dhabi, Doha and Istanbul, before and after the Qatar diplomatic crisis in 2017



International arrivals from January 1st to December 31st 2017 vs. same period in 2016.



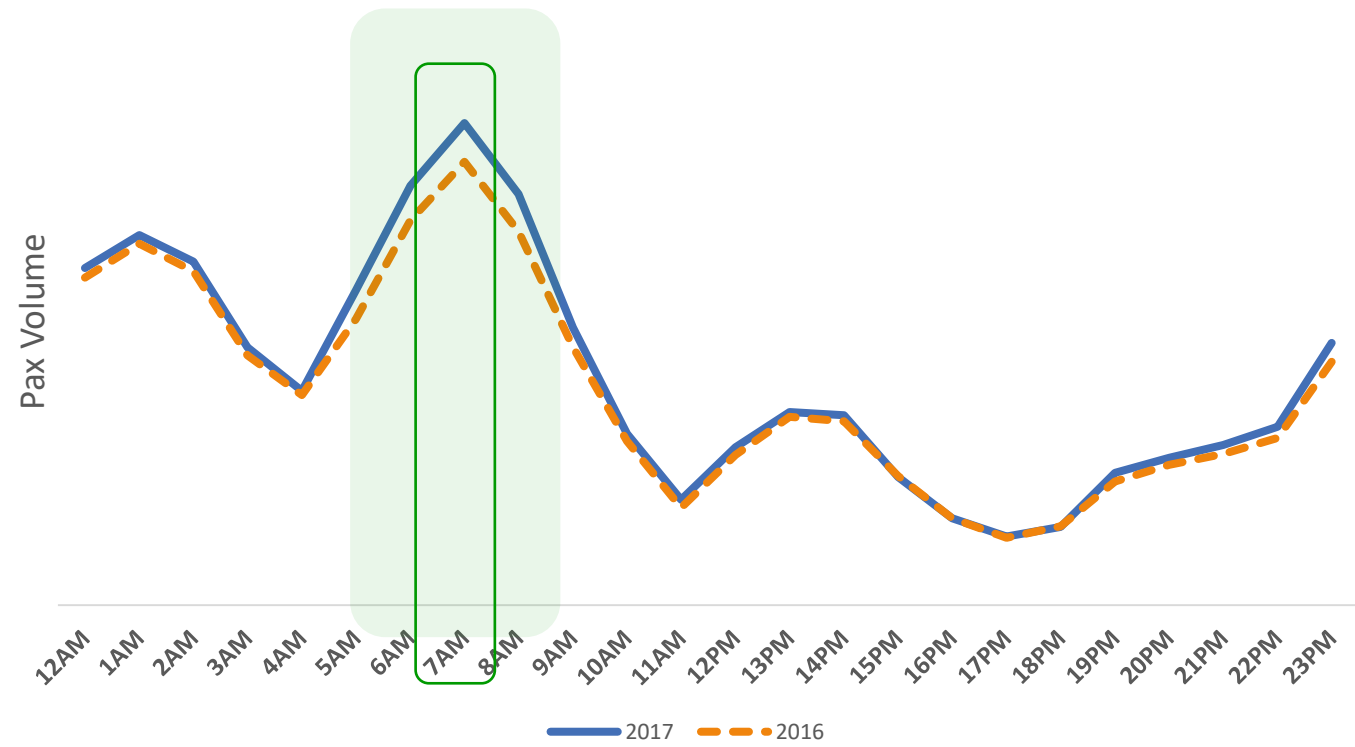
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Qatar diplomatic Crisis happened on June 5, 2017.

Busiest hours at Dubai airport during 2017: early mornings saw most departures

Distribution of dwelling time in Dubai



Busiest hours at Dubai airport during 2017: early mornings saw BRIC departures

Distribution of dwelling time by key nationalities in 2017

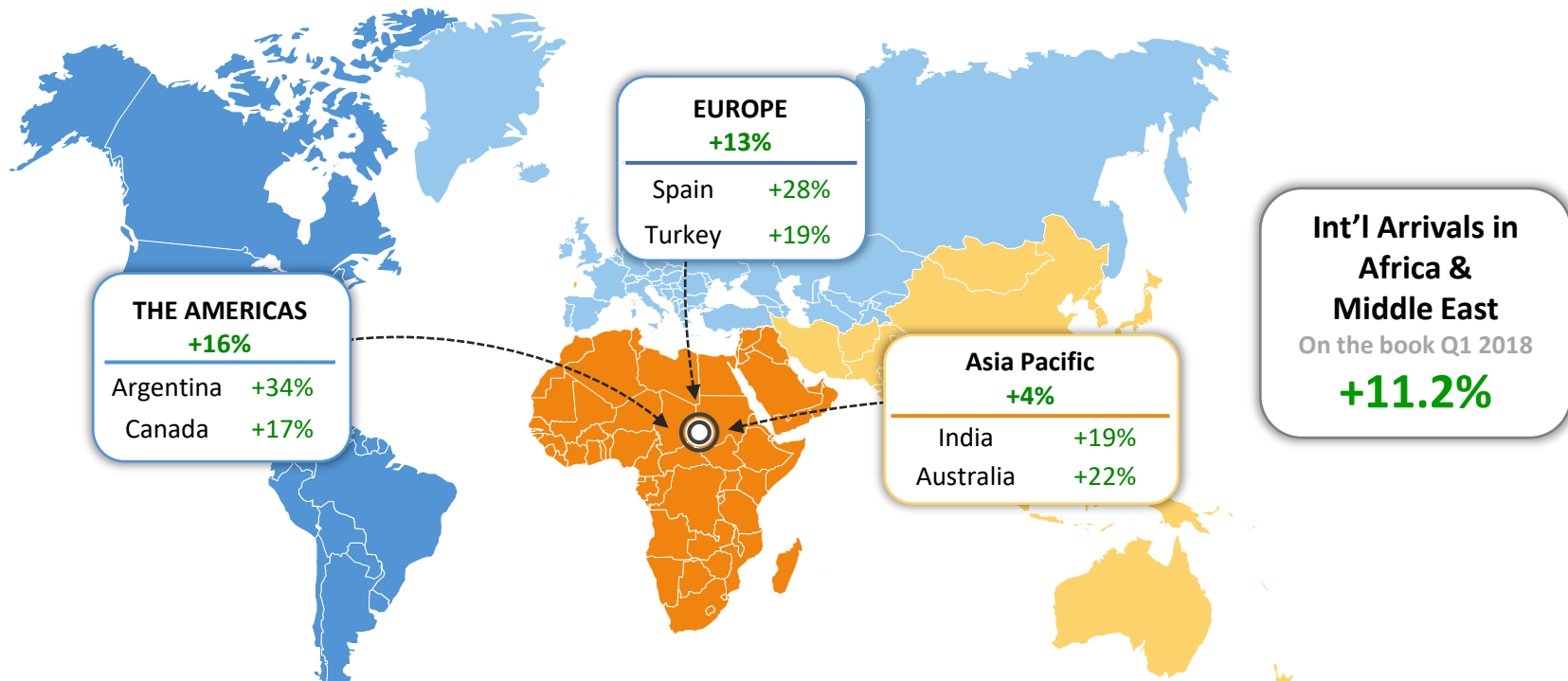




#2 Forward looking Q1 2018 performance

Forward looking Q1 2018: inbound Middle East & Africa see positive trend

International arrivals in Middle East & Africa by origin region and two rising countries Q1 2018



International arrivals on the book from Jan 1st to Mar 31st 2018 with bookings issued as of 18th Jan 2018 vs. same period previous year.



Only considered visitors staying 1 to 21 nights in the destinations. Excluded one way trips, day trips and transfers



Geographic categories follow UNWTO definitions.

Shifting dynamics on super-connectors

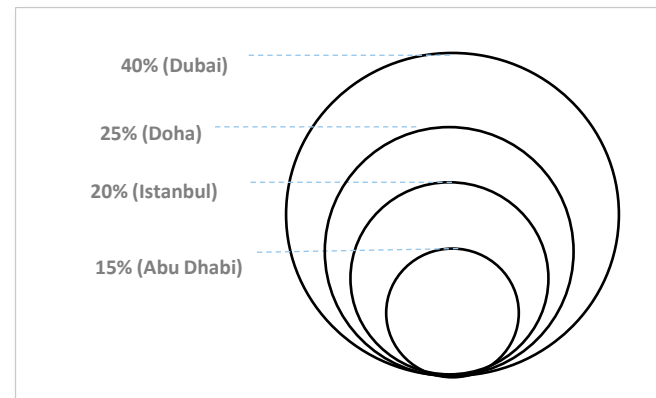
Hub airports in terms of **TRANSFER PASSENGERS** from selected origin markets Q1 2018

Dubai -0.5%	Doha -0.1%	Abu Dhabi -14%
USA -20%	China -15%	UK -6%
UK -8%	India -32%	USA -20%
Russia -29%		Germany -20%

Istanbul +21%

UK +30%	India +17%
USA +52%	China +5%
Germany +35%	Russia +70%

Transfer passenger volume comparison



International arrivals on the book from Jan 1st to Mar 31st 2018 with bookings issued as of 18th Jan 2018 vs. same period previous year.



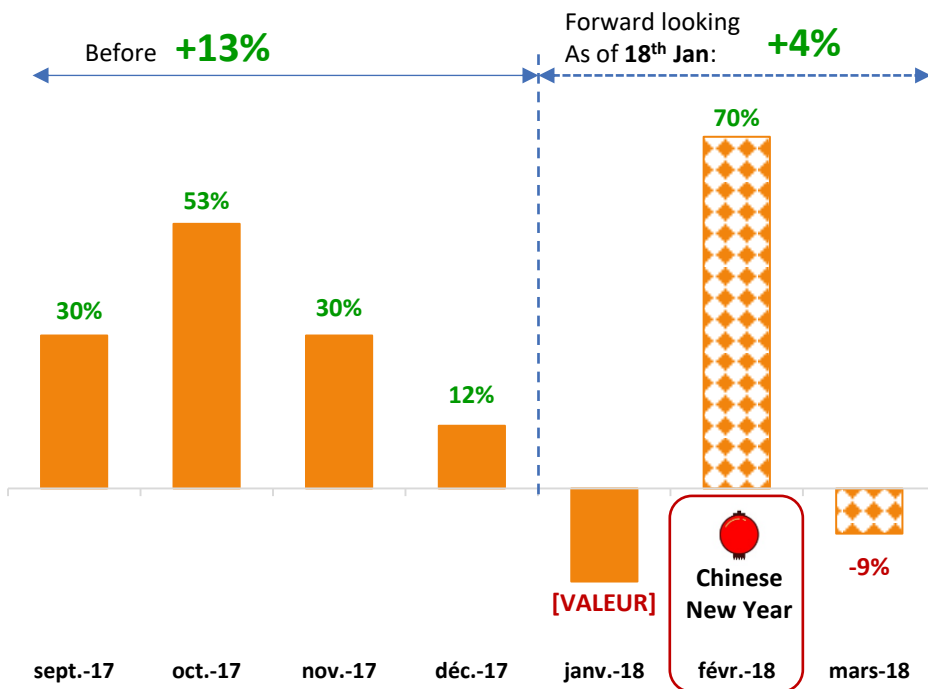
Only considered transfer passengers via these airports. Bubble size matches the passenger volume on the book.



Geographic categories follow UNWTO definitions.

Special focus: Chinese arrivals in Dubai Sep 2017 to Mar 2018

YoY variations of monthly arrivals from China to Dubai



Chinese to Dubai has a very short lead time



Forward looking Q1 2018 China to Dubai

As of Jan 18th **+4%**

As of Jan 24th **+6%**

March 2018 turns positive, with group bookings from Urumqi

International arrivals on the book from Jan 1st to Mar 31st 2018 with bookings issued as of 18th Jan 2018 vs. same period previous year.

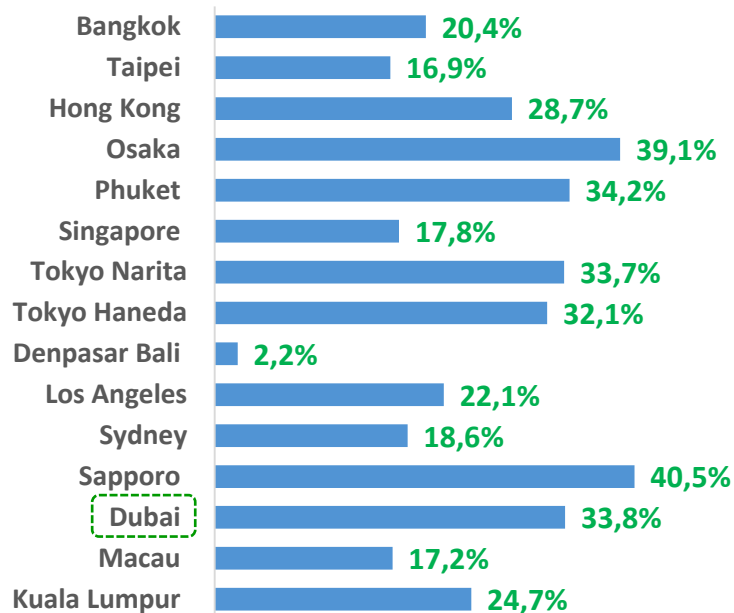
Only considered visitors staying 1 to 21 nights in the destinations. Excluded one way trips, day trips and transfers

Geographic categories follow UNWTO definitions.

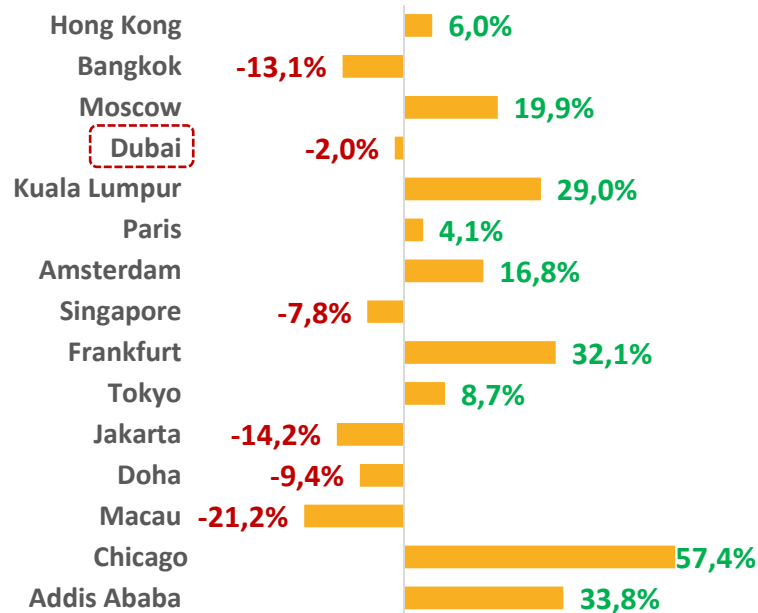
Special focus: outbound China for Chinese New Year 2018 (Cont.)

Top 15 busy airports for departures from overseas back to China during Chinese New Year 2018

Stay and flying home **+25.2%**



Transfer on the way home **+5.7%**



Int'l departures from 25th Jan to 28th Feb 2018 vs. 6th Jan to 9th Feb 2017 with bookings as of **24th Jan 2018**.



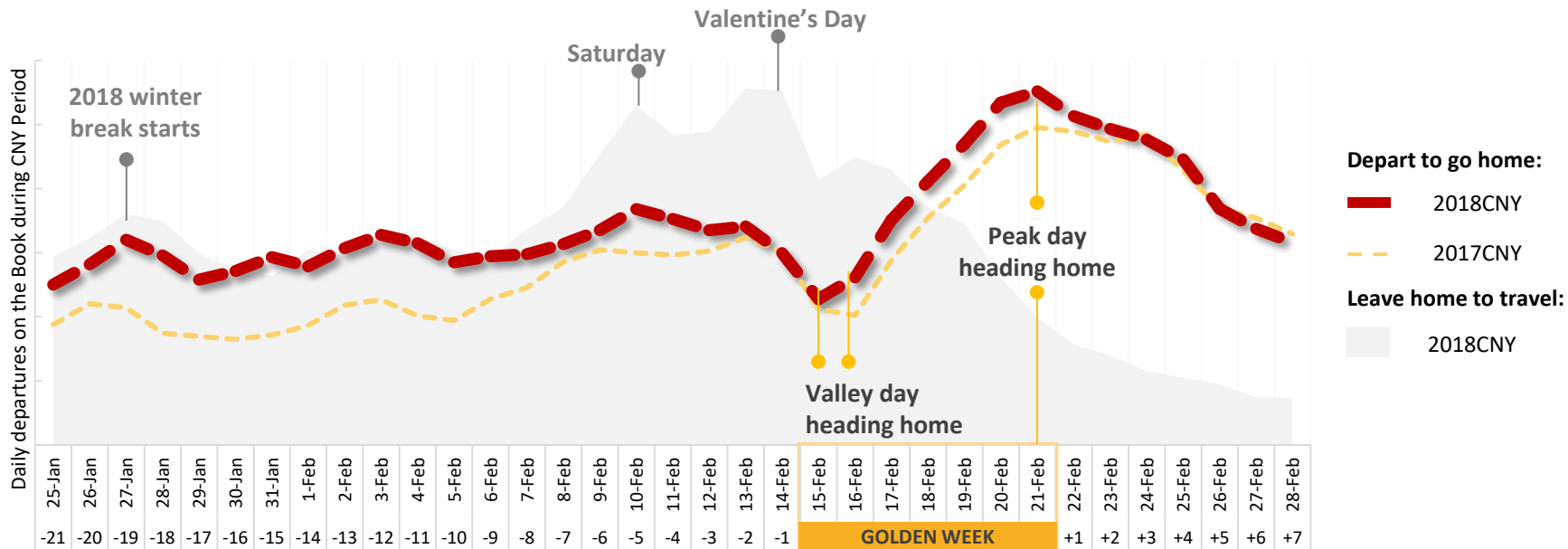
Only considered visitors staying 1 to 21 nights, transfers, or make day trips at the destinations and the visitor next stop is back in China.



Excluded South Korea as a destination and hub.

Special focus: outbound China for Chinese New Year 2018

Daily departures from China & departures from overseas back to China during Chinese New Year 2018



Int'l departures from 25th Jan to 28th Feb 2018 vs. 6th Jan to 9th Feb 2017 with bookings as of 15th Jan 2018.



Only considered visitors staying 1 to 21 nights, transfers, or make day trips at the destinations and the visitor next stop is back in China.



Excluded South Korea as a destination and hub.

Outlook 2018 for Middle East and Africa: the knowns and unknowns...



- **UAE <> China visa waiver**
- **Saudi offers tourist e-visas**
- **Russia <> Egypt flights resume**
- **FIFA World Cup in Russia**
- **Rwanda visa waiver for all nationalities**



- **Qatar crisis continues**
- **US impact on the regional affairs**
- **?**



Beijing
▲ 12%

Shanghai
▲ 27%

Hangzhou
▼ 14%

THANK YOU!



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