

Leveraging travel intelligence to uncover new opportunities in Asia Pacific

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ForwardKeys data captures and reflects the entire traveller journey

FUTURE

SUPPLY

DEMAND



Schedules

Seat Capacity



Searching

Flight Searches



Booking

Actual Air Reservations + Actual Air Tickets + Total Air Market



Arriving



Staying



Departing



Future

Forward-Looking
Capacity and Tickets

MEASURING TOURISM

What does the data say?

AIR CAPACITY

Understanding the Backbone of Air Travel



Global air connectivity maintains stable growth through 2025

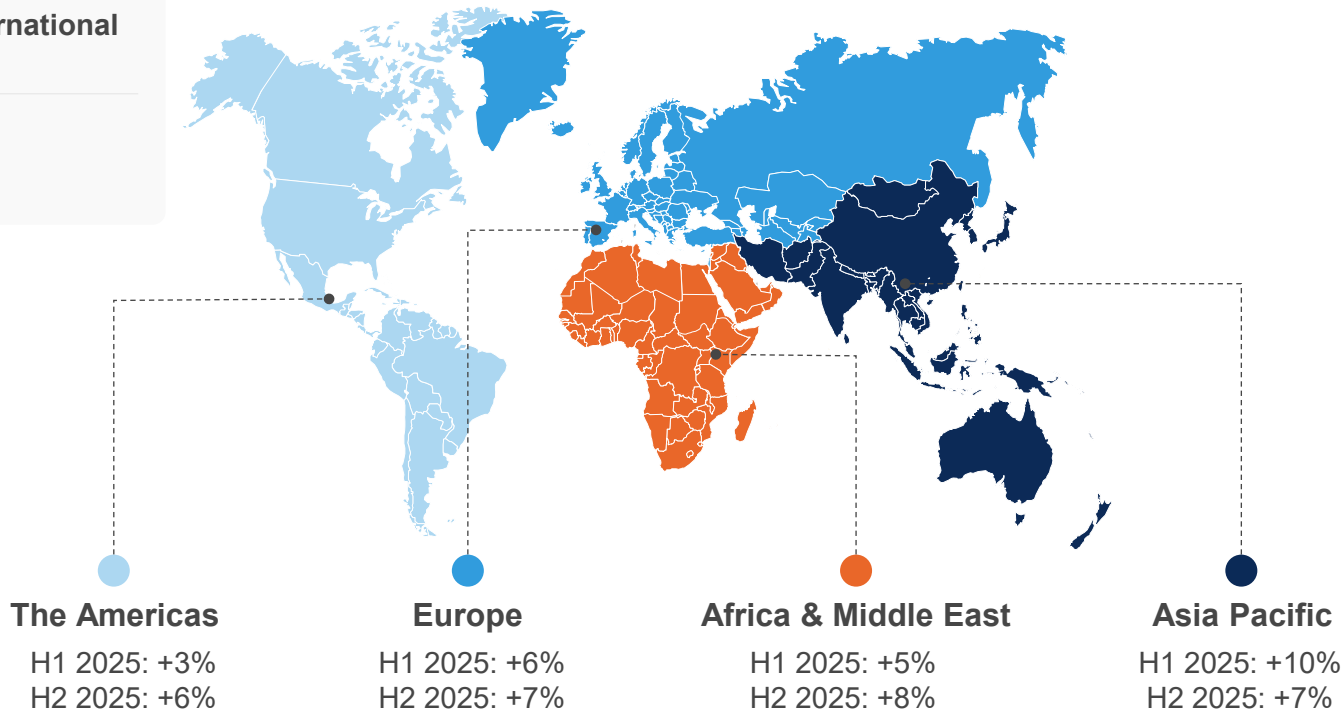
International Air Capacity; variation vs previous year

51

Worldwide international air capacity

H1 2025: +6%

H2 2025: +7%



APAC air connectivity: Northeast Asia remains top performer

Flown and Forecasted available seats for international flights arriving to Asia Pacific in 2025; vs 2024

Asia Pacific

+8% vs 2024

Northeast Asia

+11% vs 2024

South Asia

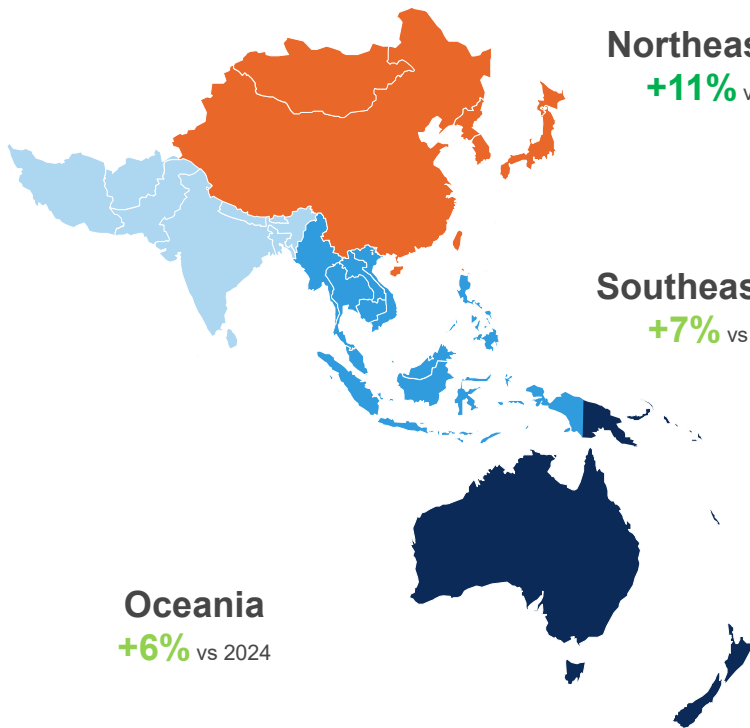
+5% vs 2024

Southeast Asia

+7% vs 2024

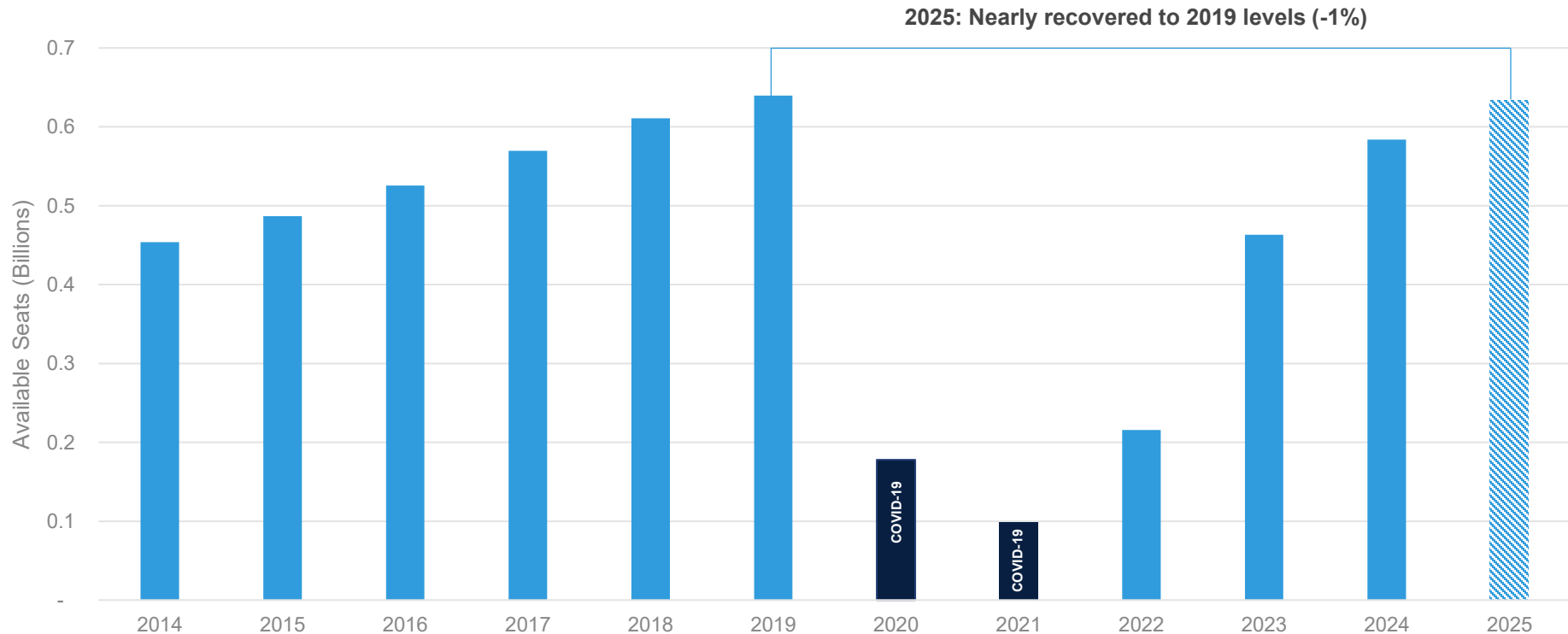
Oceania

+6% vs 2024



APAC air connectivity: On track to reach pre-pandemic levels

Flown and Forecasted available seats for international flights arriving to Asia Pacific



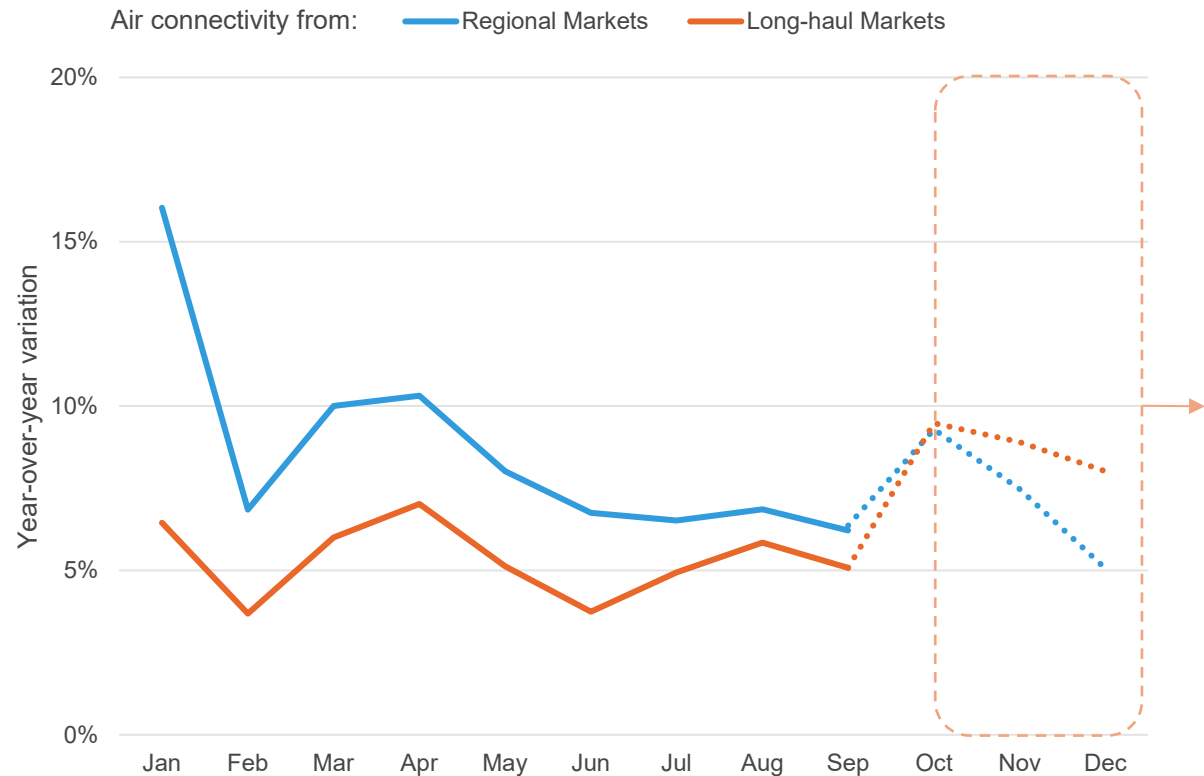
APAC air connectivity: the switch from recovery to growth

Flown and Forecasted available seats for international flights arriving to Asia Pacific in 2025; vs 2024 and 2019

Top Destinations By volume	Variation 2025 vs 2024	Variation 2025 vs 2019
Mainland China	+14%	-14%
Japan	+12%	+8%
Thailand	+4%	-11%
South Korea	+5%	+3%
Hong Kong SAR	+13%	-13%
Singapore	+2%	=0%
India	+7%	+22%
Malaysia	+9%	=0%
Australia	+7%	+5%
Vietnam	+15%	+19%
TOTAL APAC	+8%	-1%

APAC air connectivity: Regional strength first, long-haul drive year-end

Flown and Forecasted available seats for international flights arriving to Asia Pacific in 2025; vs 2024



Fastest expanding airlines on long-haul routes in Q4:

China Eastern Airlines	+30%
Cathay Pacific	+28%
Etihad Airways	+22%
China Southern Airlines	+17%
Turkish Airlines	+16%

TOTAL LONG-HAUL +9%

TRAVEL INTENT

Decoding the Future of Travel Preferences



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an amadeus company

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Travel intent: Nature destinations in APAC top travelers' wishlist

Flight searches to Asia Pacific for travel departing from August to October 2025; vs 2024

Destination Preference*		Year-over-year variations
	Nature	+13%
	Sun and Beach	+5%
	Urban	+5%
	Shopping	+4%
	Business	+4%

**Categorized by ForwardKeys destination preference index*

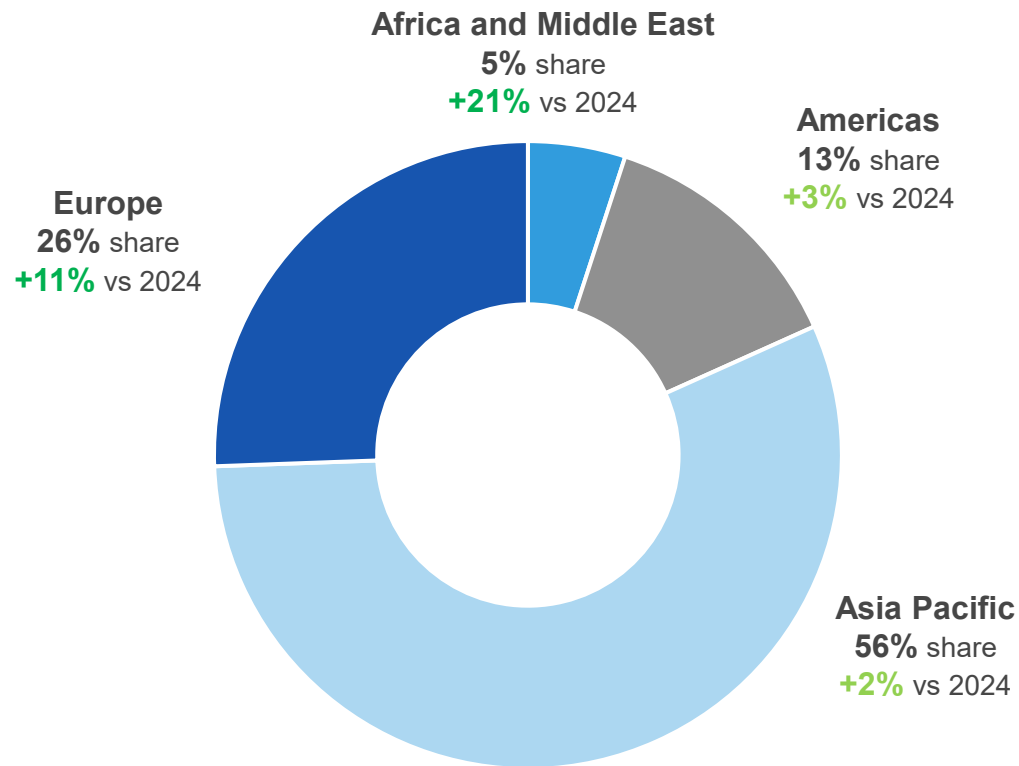
Travel intent: city-to-nature gateways are on the rise

Flight searches to Asia Pacific for travel departing from August to October 2025; vs 2024

Top Performing Destinations		Variation 2025 vs 2024
	Shanghai	+56%
	Colombo	+39%
	Busan	+29%
	Melbourne	+26%
	Hanoi	+20%
	Taipei	+16%
	Fukuoka	+16%
	Singapore	+15%
	Da Nang	+12%
	Ho Chi Minh City	+12%

Travel intent: long-haul markets fuel growth

Flight Searches made year-to-date for travel to Asia Pacific between August and October 2025; vs 2024



Top performing origin markets*	Vs 2024
India	+41%
Saudi Arabia	+33%
Spain	+28%
Switzerland	+21%
Canada	+17%
Vietnam	+16%
Italy	+12%
United Arab Emirates	+12%
South Korea	+11%
United Kingdom	+10%

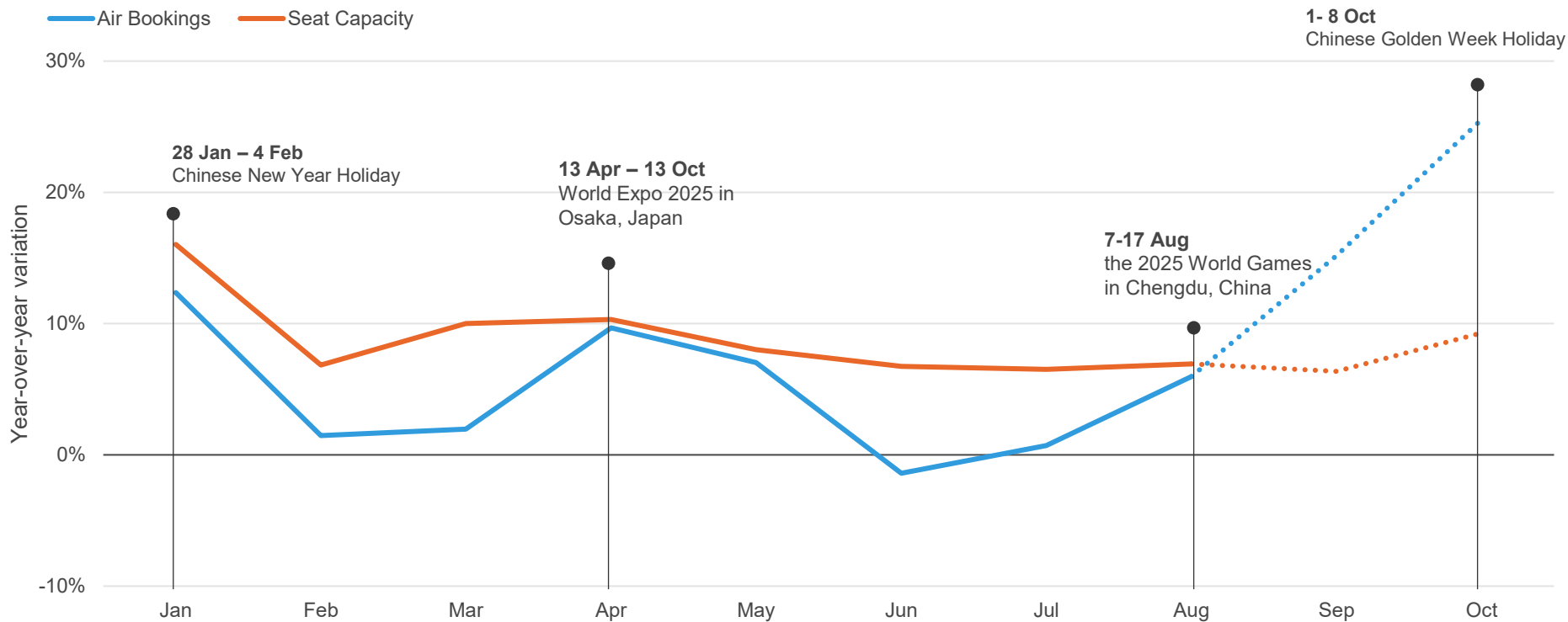
*considering markets that represent more than 1% share

TRAVEL DEMAND

Key Trends and Drivers of Global Tourism

Travel demand: Events and holidays power travel across APAC

International Arrivals to Asia Pacific during Jan-Oct 2025; variation vs previous year



Travel demand: Spanning a wide range of APAC destinations

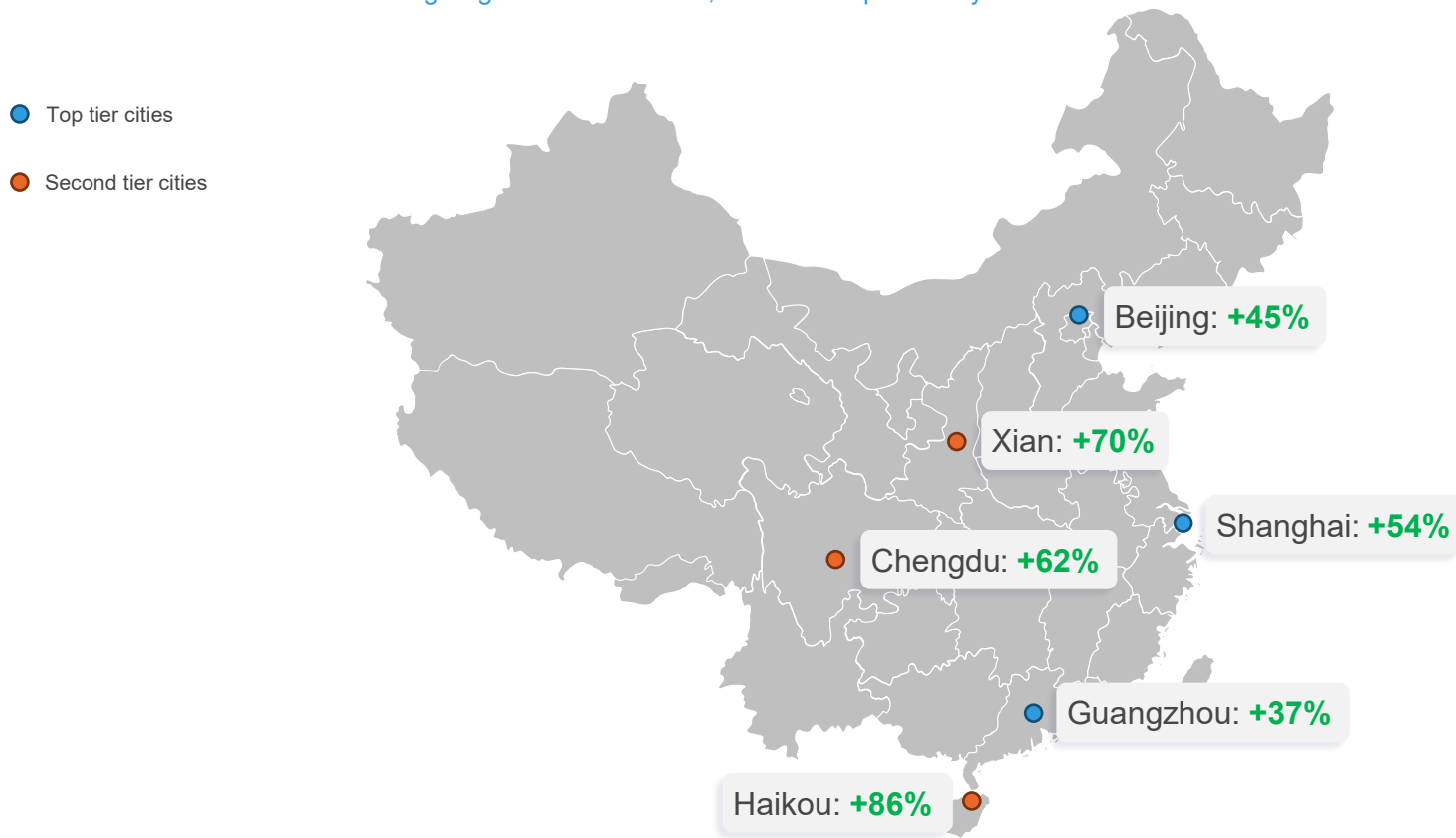
International Arrivals to Asia Pacific during Aug-Oct 2025 vs 2024; variation vs previous year

Top Performing Destinations*	Arrivals Var vs 2024	Seat Capacity Var vs 2024
China	+43%	+10%
Japan	+25%	+10%
Sri Lanka	+17%	+16%
Malaysia	+13%	+7%
Vietnam	+12%	+16%
Singapore	+12%	=0%
Australia	+11%	+9%
New Zealand	+9%	+6%
Indonesia	+8%	+8%
South Korea	+4%	+5%
TOTAL APAC	+13%	+8%

**considering destinations that represent more than 1.3% share*

Travel demand: 'Second-tier' cities in China attracting inbound travellers

International Arrivals to China during Aug-Oct 2025 vs 2024; variation vs previous year



Travel demand: Top origin markets fuelling growth

International Arrivals to Asia Pacific during Aug-Oct 2025 vs 2024; variation vs previous year

 Top performing origin markets within Asia*	Var Vs 2024
 Malaysia	+33%
 Philippines	+25%
 Indonesia	+24%
 Thailand	+22%
 Japan	+21%
Total Regional	+14%

 Top performing origin markets outside Asia*	Var Vs 2024
 Russia	+59%
 Belgium	+34%
 Italy	+17%
 Switzerland	+16%
 Denmark	+16%
Total Long-haul	+11%

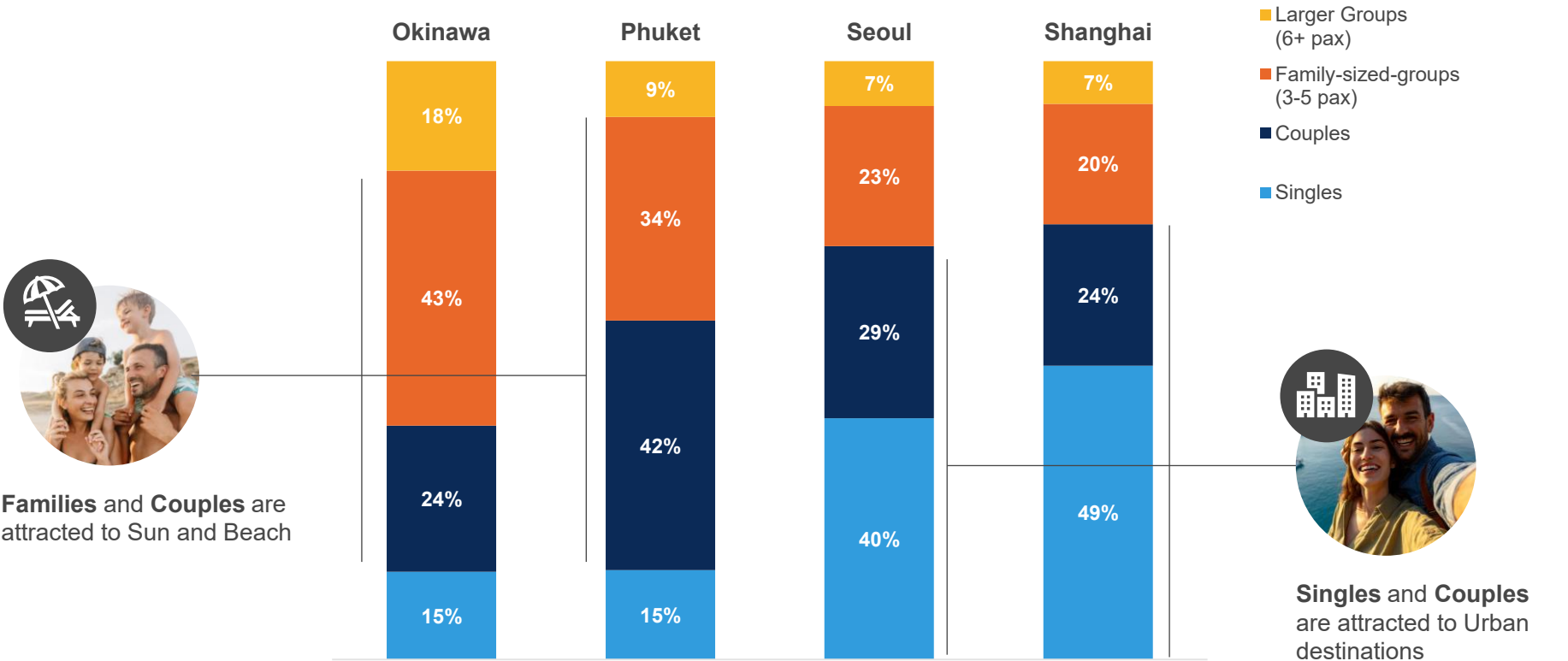
*considering markets that represent more than 1% share

TRAVELER PROFILE

Unveiling the Key Traits of Today's Travelers

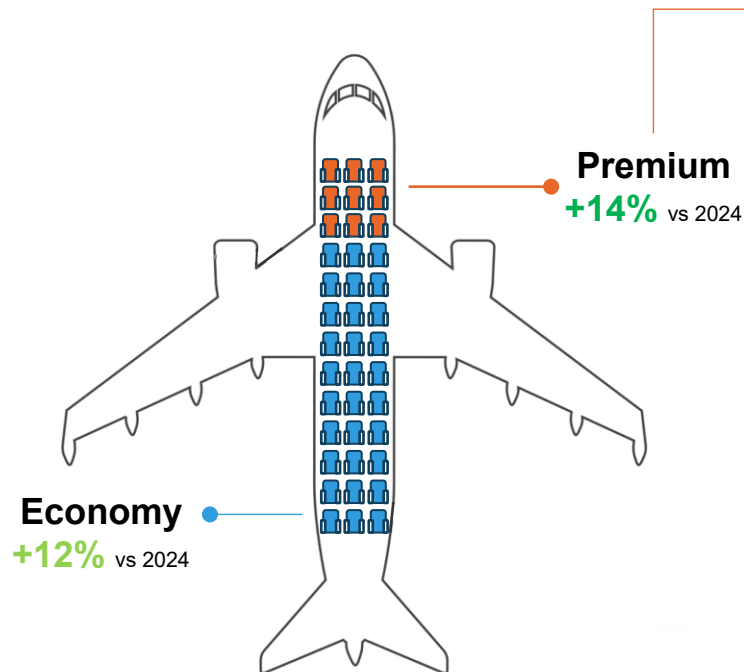
Distinct destination offerings attract different profiles

International air bookings to Asia Pacific for arrivals between January and July 2025; Var vs 2024



Where affluent travellers are heading?

International air reservations to Asia Pacific between August and October 2025; vs 2024

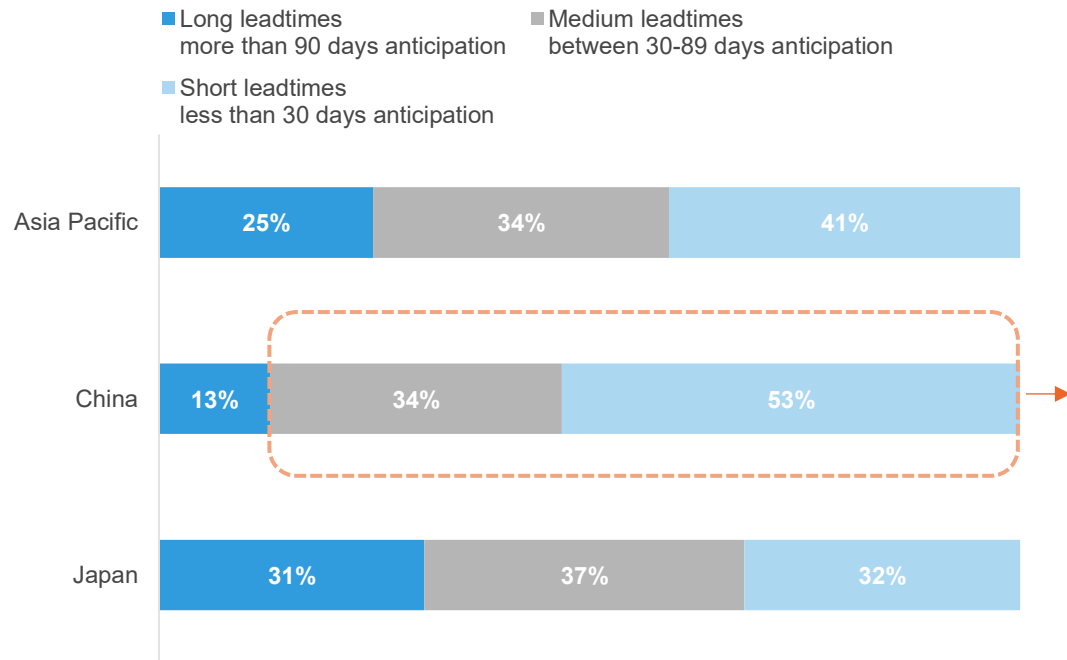


Top performing premium destinations*	Vs 2024
Shanghai	+27%
Tokyo	+21%
Kuala Lumpur	+20%
Beijing	+17%
Hanoi	+17%
Sydney	+16%
Osaka	+16%

*considering markets that represent more than 1.7% share

Travel lead time: How visa policies affect planning behaviours

Air bookings made for international travel to Asia Pacific between January and July 2025; vs 2024



Short and Medium leadtimes

Top performing origin markets*	Vs 2024	Visa Policy
Russia	+89%	240-hour visa-free transit
Canada	+61%	240-hour visa-free transit
Thailand	+57%	Visa Free
South Korea	+53%	Visa Free
Malaysia	+51%	Visa Free

*considering markets that represent more than 1% share

IDENTIFYING OPPORTUNITIES

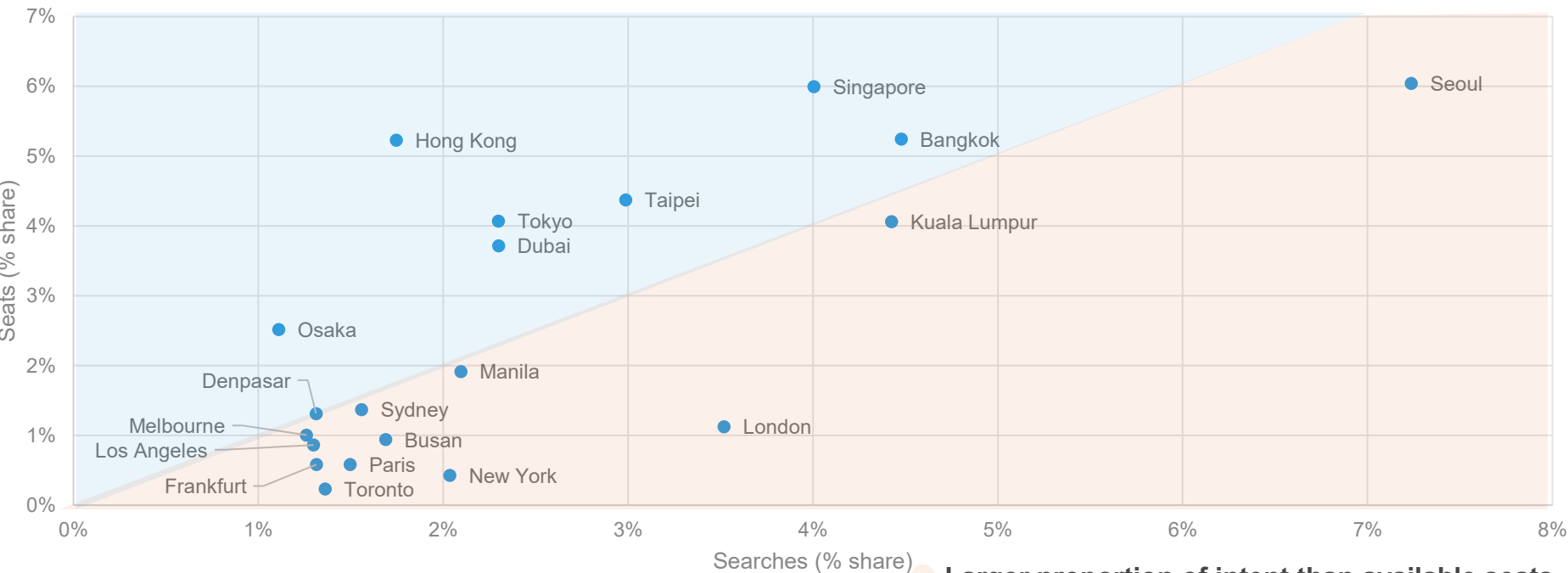
Exploring Underserved Routes



Understand your market: Underserved Routes

Available seats on direct flights and searches made for travel between January and July 2025 for international arrivals to Asia Pacific

Larger proportion of available seats than travel intent



Larger proportion of intent than available seats

Take-Aways



1

Regional and long-haul connectivity keeps improving across APAC

2

**Travel intent to the region
is strong**

3

Segmentation is key to unlock new opportunities

4

**It is time to put
data to work!**

Get your own report!

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