

Embracing Travel Intelligence, Driving the Future of Tourism

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ForwardKeys data captures and reflects the entire traveller journey



SUPPLY



Schedules



Seat Capacity

ForwardKeys data captures and reflects the entire traveller journey



SUPPLY

DEMAND



Schedules



Searching



Booking



Arriving



Staying



Departing



Seat Capacity

Flight Searches

Flight Bookings Data + Total Air Market

ForwardKeys data captures and reflects the entire traveller journey



SUPPLY

DEMAND

FUTURE



Schedules

Searching

Booking

Arriving

Staying

Departing

Future



Seat Capacity

Flight Searches

Flight Bookings Data + Total Air Market

Forward-Looking Capacity

Airlines increase available seats for 2025

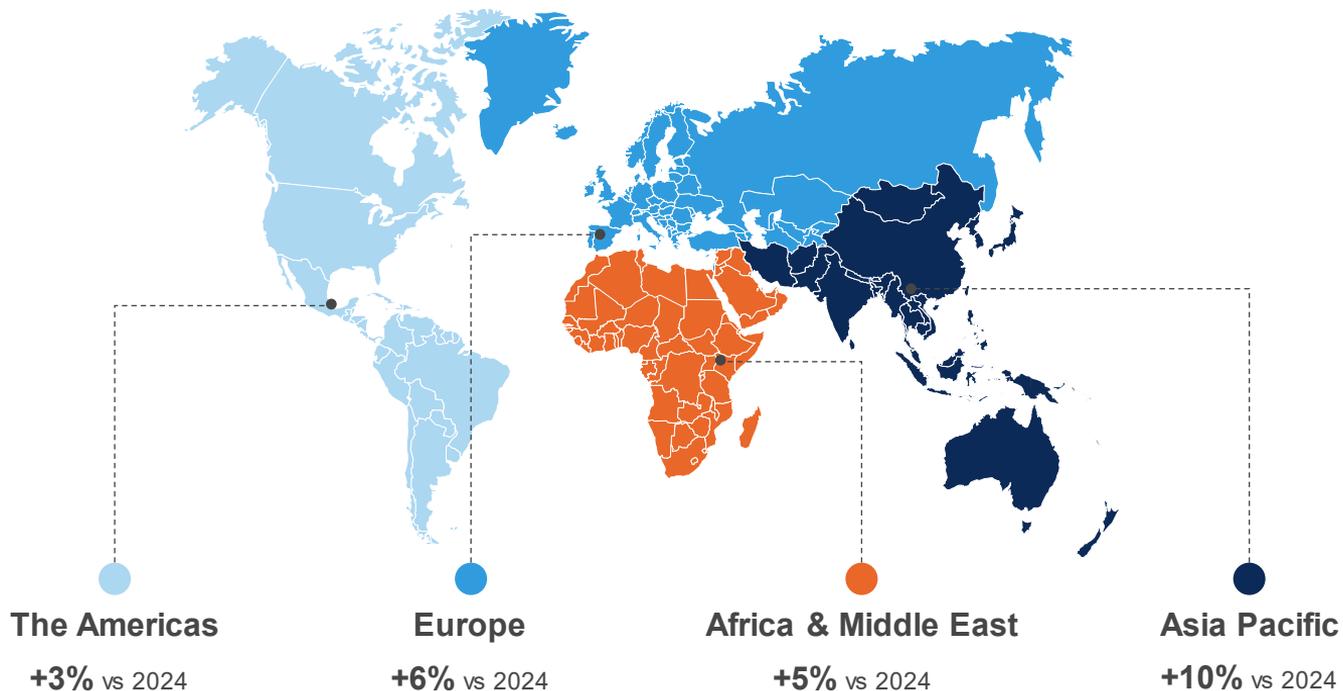
Flown and Forecasted air supply for international flights in 2025 as of 19 August; vs previous year

1/5

Worldwide international air connectivity

H1 2025 vs 2024

+6% ↑



H1 2025:

Airlines increase available seats for 2025

Flown and Forecasted air supply for international flights in 2025 as of 19 August; vs previous year

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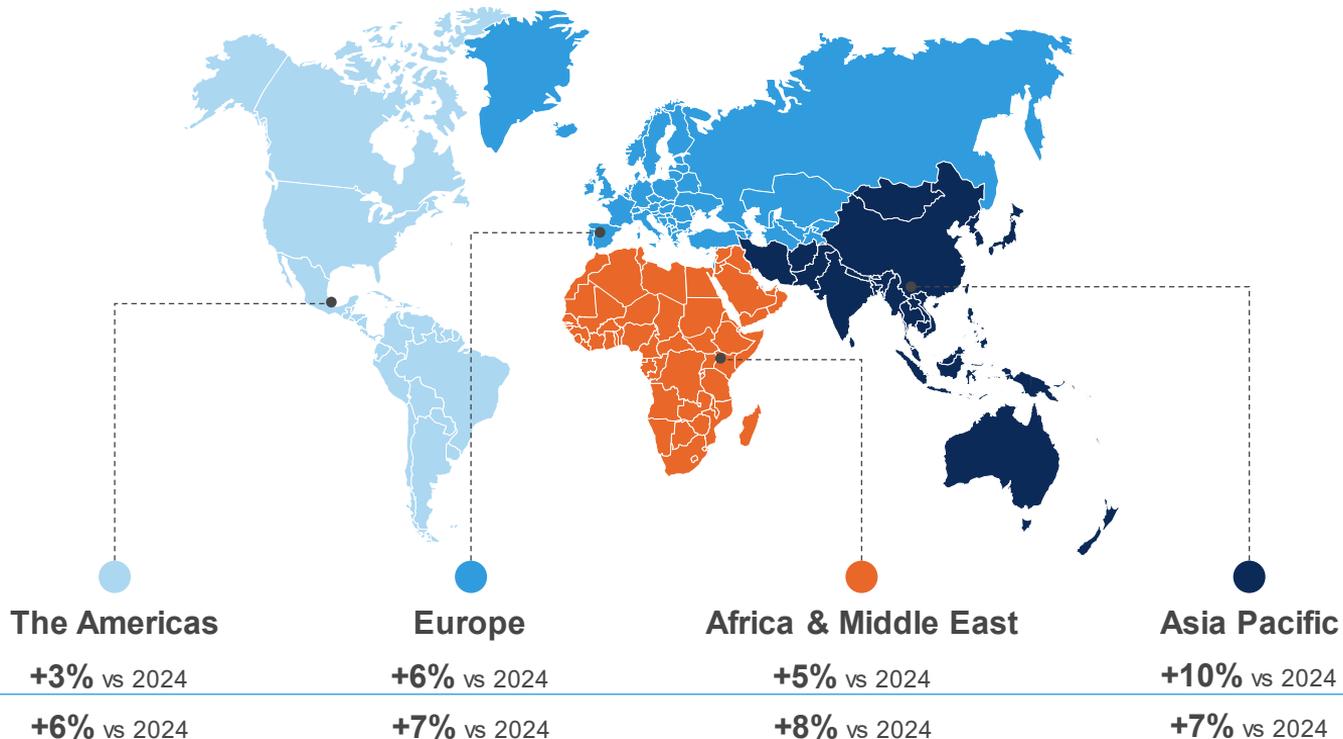
Worldwide international air connectivity

H1 2025 vs 2024

+6% ↑

H2 2025 vs 2024

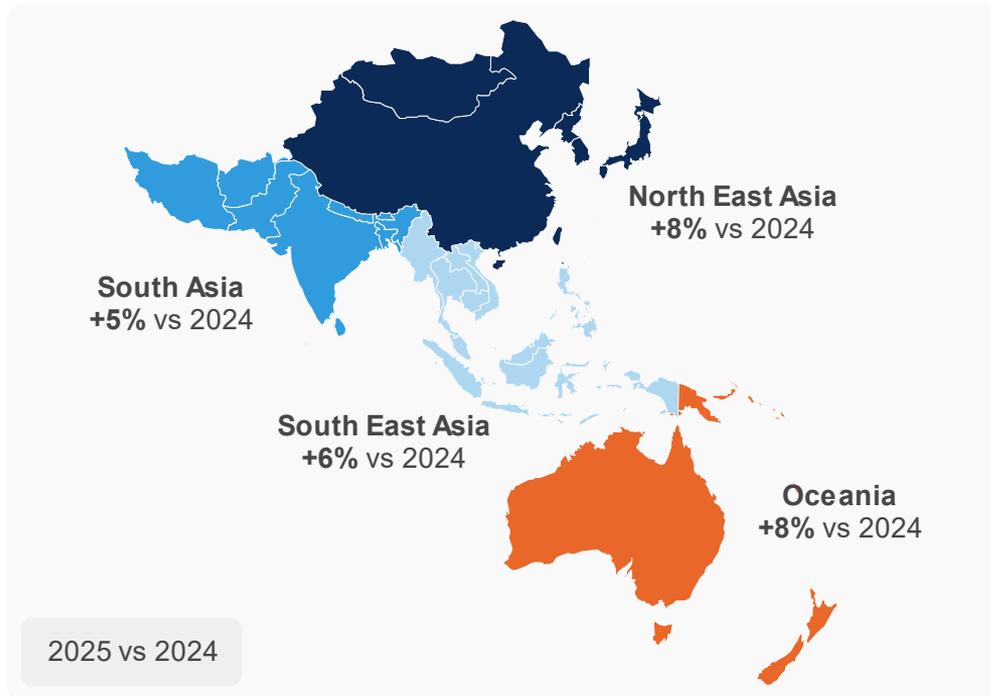
+7% ↑



Available seats increase throughout the Asia Pacific region

Flown and Forecasted air supply for international flights between July and December 2025, as of 19 August; vs previous year

Top Destinations



India **+5%**

Pakistan **+10%**

Sri Lanka **+12%**

Bangladesh **+5%**

Maldives **+4%**

China **+10%**

Japan **+9%**

South Korea **+4%**

Hong Kong **+11%**

Taiwan **+8%**

Thailand **+1%**

Singapore **=0%**

Malaysia **+8%**

Vietnam **+14%**

Indonesia **+8%**

Australia **+9%**

New Zealand **+4%**

Fiji **+3%**

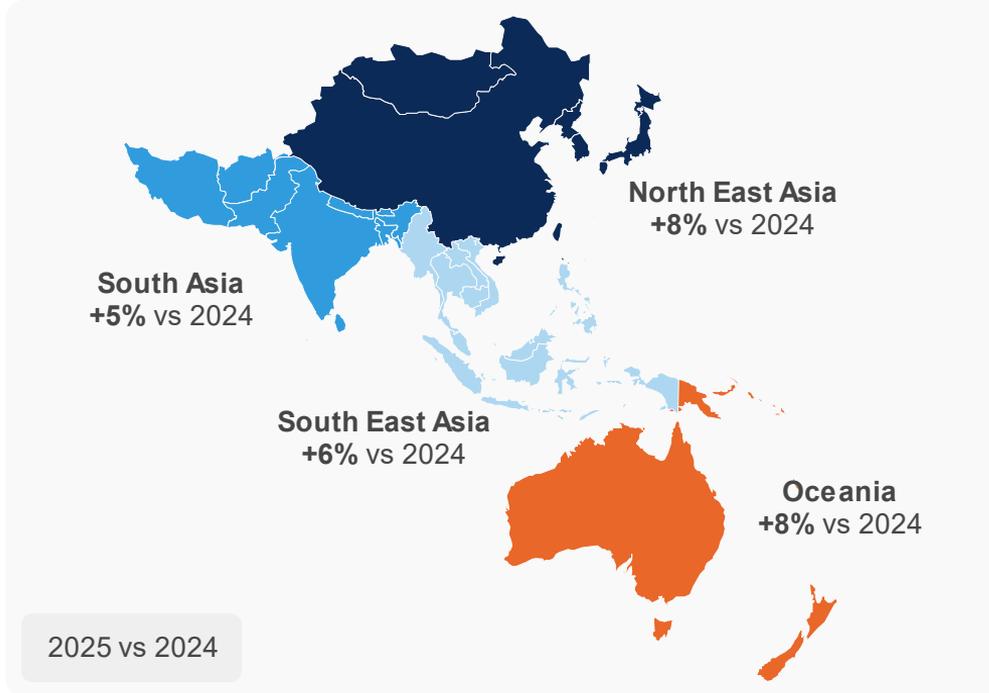
Guam **+16%**

French Polynesia **+11%**

Available seats increase throughout the Asia Pacific region

Flown and Forecasted air supply for international flights between July and December 2025, as of 19 August; vs previous year

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India **+5%**
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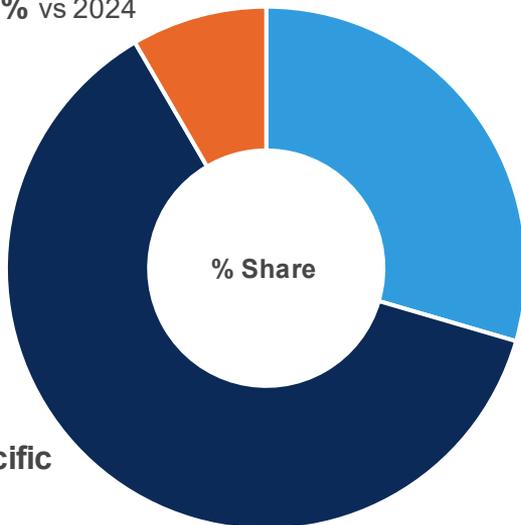
Vietnam air connectivity: Which markets are driving growth?

Forecasted air supply for international flights to Vietnam between July and December 2025, as of 19 August; vs previous year

Rest of World

8.4% share

+37% vs 2024



South East Asia

29.5% share

+18% vs 2024

Rest of Asia Pacific

62.1% share

+9% vs 2024

92% of available seats on direct flights to Vietnam come from within the continent

Airlines flying within **South East Asia** are increasing operations by **+18% year-over-year**

Vietnam air connectivity: Which markets are driving growth?

Forecasted air supply for international flights to Vietnam between July and December 2025, as of 19 August; vs previous year

Top Performing Origin Markets*	% Share	Var vs 2024
Hong Kong	4.6%	+57%
United Arab Emirates	1.5%	+51%
Philippines	2.5%	+49%
China	13.1%	+29%
India	3.4%	+27%
Malaysia	5.4%	+22%
Indonesia	2.2%	+18%
Thailand	9.3%	+13%
Cambodia	3.2%	+12%
Singapore	5.3%	+11%
TOTAL VIETNAM	100.0%	+14%

*Considering markets that represent more than 1.5% share

Travel Intent – Flight Searches

South East Asia travel intent

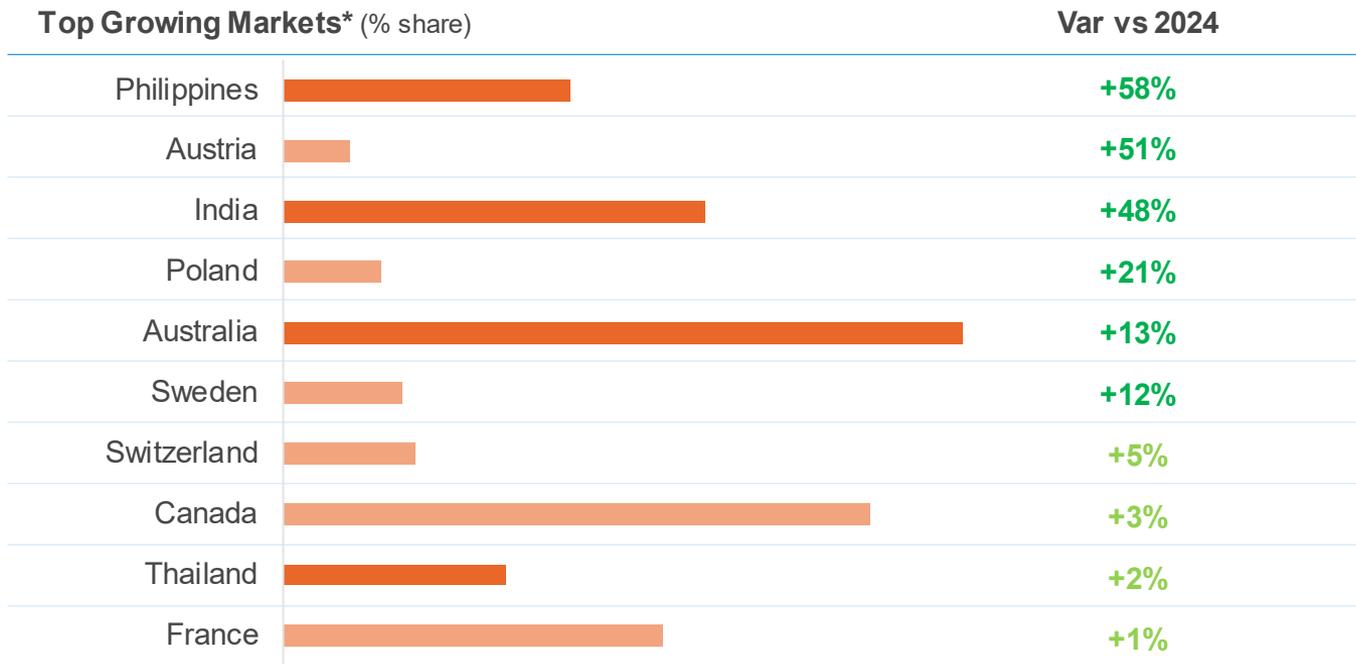
Flight Searches made for travel to South-East Asia between July and December 2025, as of 19 August; vs previous year

Top Destination Cities	% Share	Var vs 2024
Bangkok	25.9%	+17%
Denpasar	14.4%	-7%
Manila	8.0%	-6%
Singapore	7.3%	+12%
Kuala Lumpur	7.0%	+22%
Phuket	6.3%	+2%
Ho Chi Minh City	5.2%	=0%
Hanoi	4.9%	+12%
Da Nang	2.9%	=0%
Cebu City	2.2%	-17%



Interest for Ho Chi Minh City is balanced between long-haul and regional markets

Flight Searches made for travel to Ho Chi Minh City between July and December 2025, as of 19 August; vs previous year



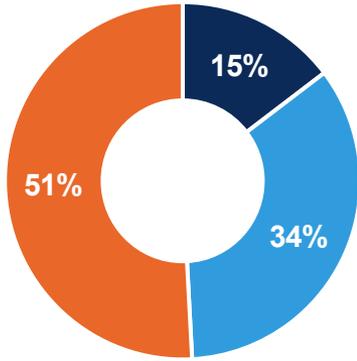
Searches from:
 Asia Pacific
 Extra-regional

*considering markets that represent more than 0.75% share

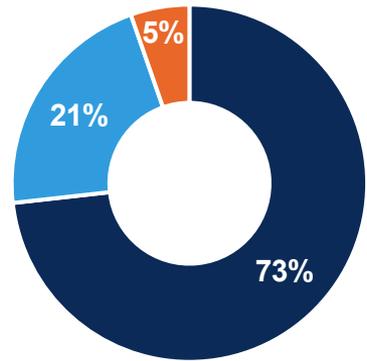
Searched Length of Stay for Ho Chi Minh City

Flight Searches made for travel to Ho Chi Minh City between July and December 2025, as of 19 August; vs previous year

Searches from
Asia Pacific



Searches from
Rest of World

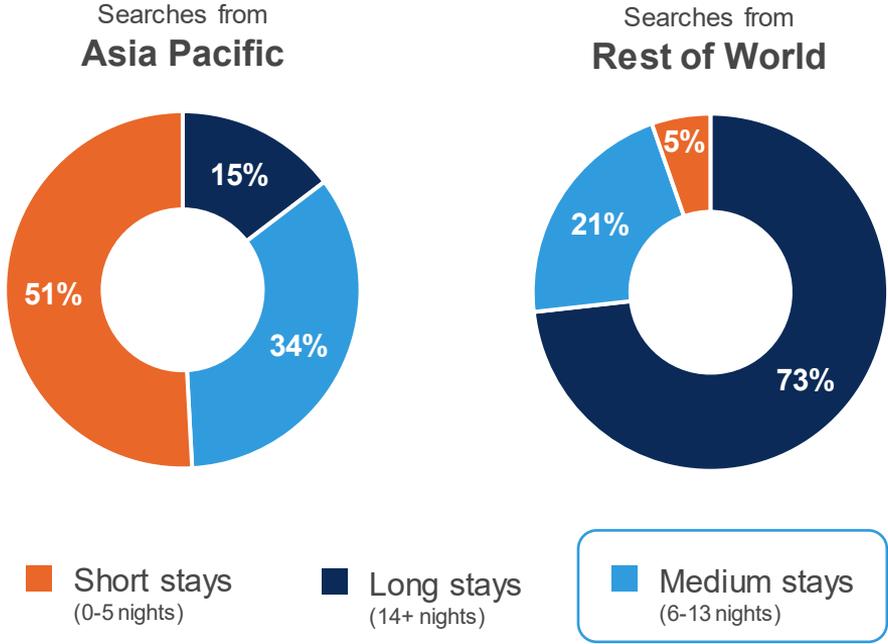


- Short stays (0-5 nights)
- Medium stays (6-13 nights)
- Long stays (14+ nights)



Searched Length of Stay for Ho Chi Minh City

Flight Searches made for travel to Ho Chi Minh City between July and December 2025, as of 19 August; vs previous year



Top Performing Markets with Medium Stays*

-  Philippines **+56%**
-  India **+55%**
-  Australia **+15%**
-  Canada **+13%**

TOTAL +10%

*considering markets that represent more than 2% share



Identifying Opportunities

Identifying opportunities: Underserved vs underused routes

Seat Capacity and Flight Searches for travel between January and June 2025 to Vietnam

Under-used Routes

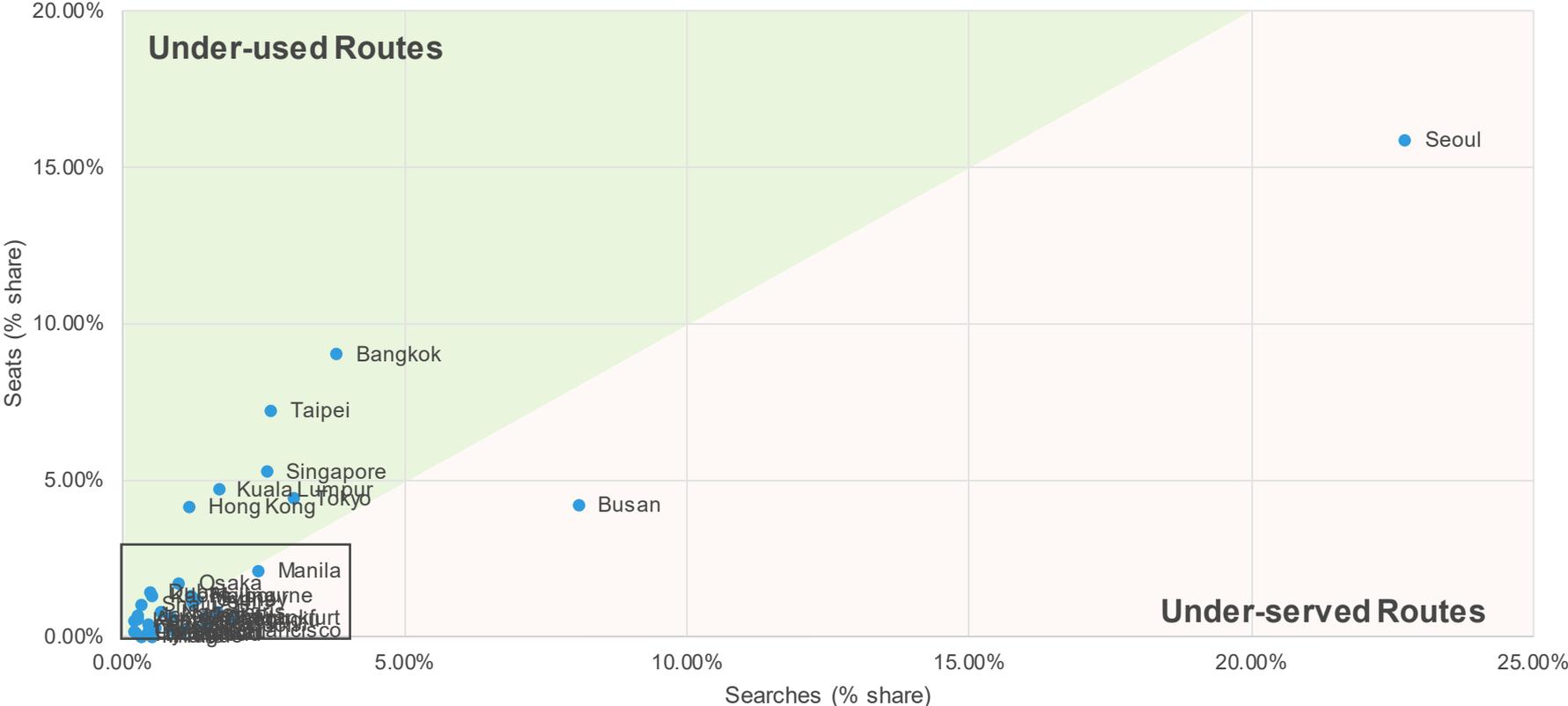
Higher proportion of available seats
compared with flight searches

Under-served Route

Higher proportion of flight searches
compared with available seats

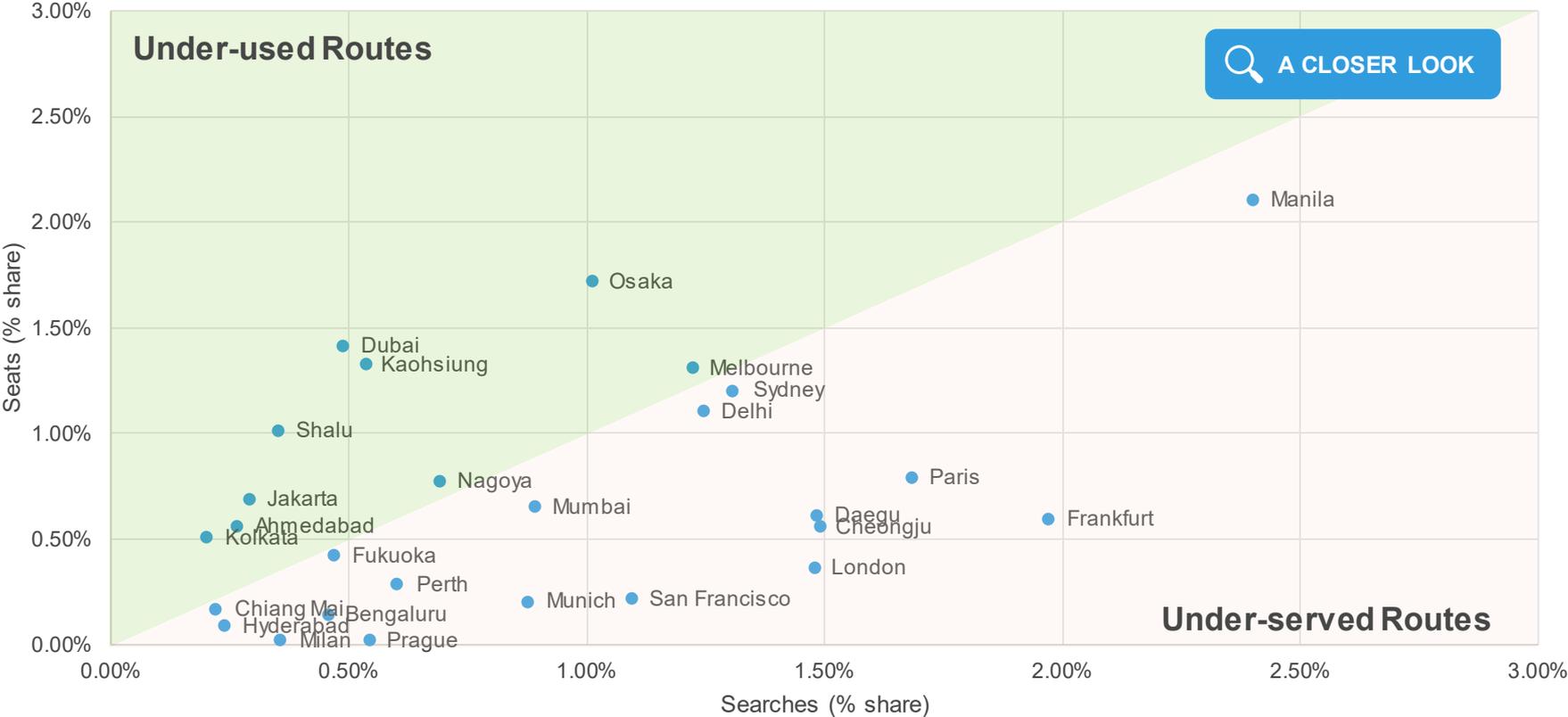
Identifying opportunities: Underserved vs underused routes

Seat Capacity and Flight Searches for travel between January and June 2025 to Vietnam



Identifying opportunities: Underserved vs underused routes

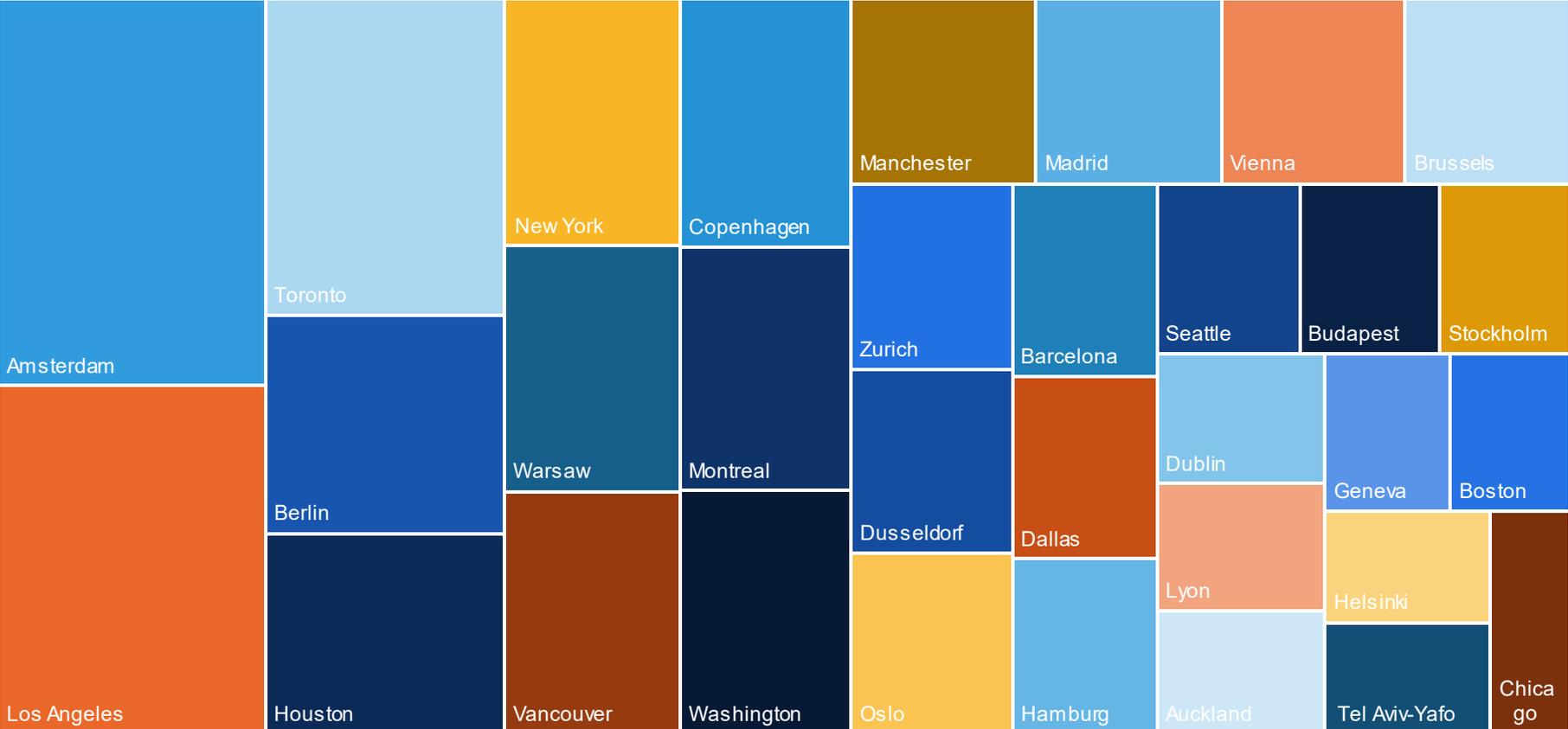
Seat Capacity and Flight Searches for travel between January and June 2025 to Vietnam



Unserviced routes: Markets with intent to travel but 0 direct connections



Seat Capacity and Flight Searches for travel between January and June 2025 to Vietnam



Hotel Rates & Occupancy



Hotel rates vs regional average

Avg Daily Rates (ADR) for hotel stays between August 2024 and July 2025



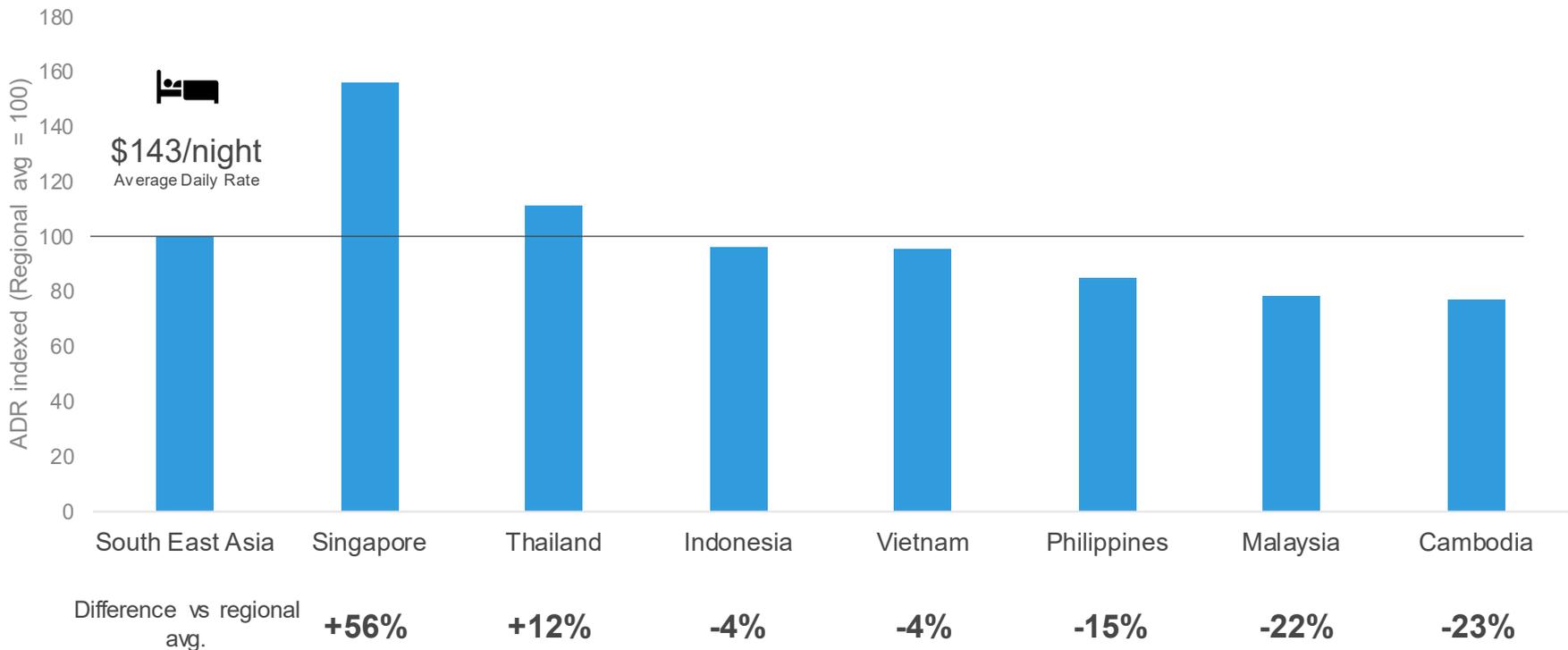
\$143/night
Average Daily Rate



South East Asia

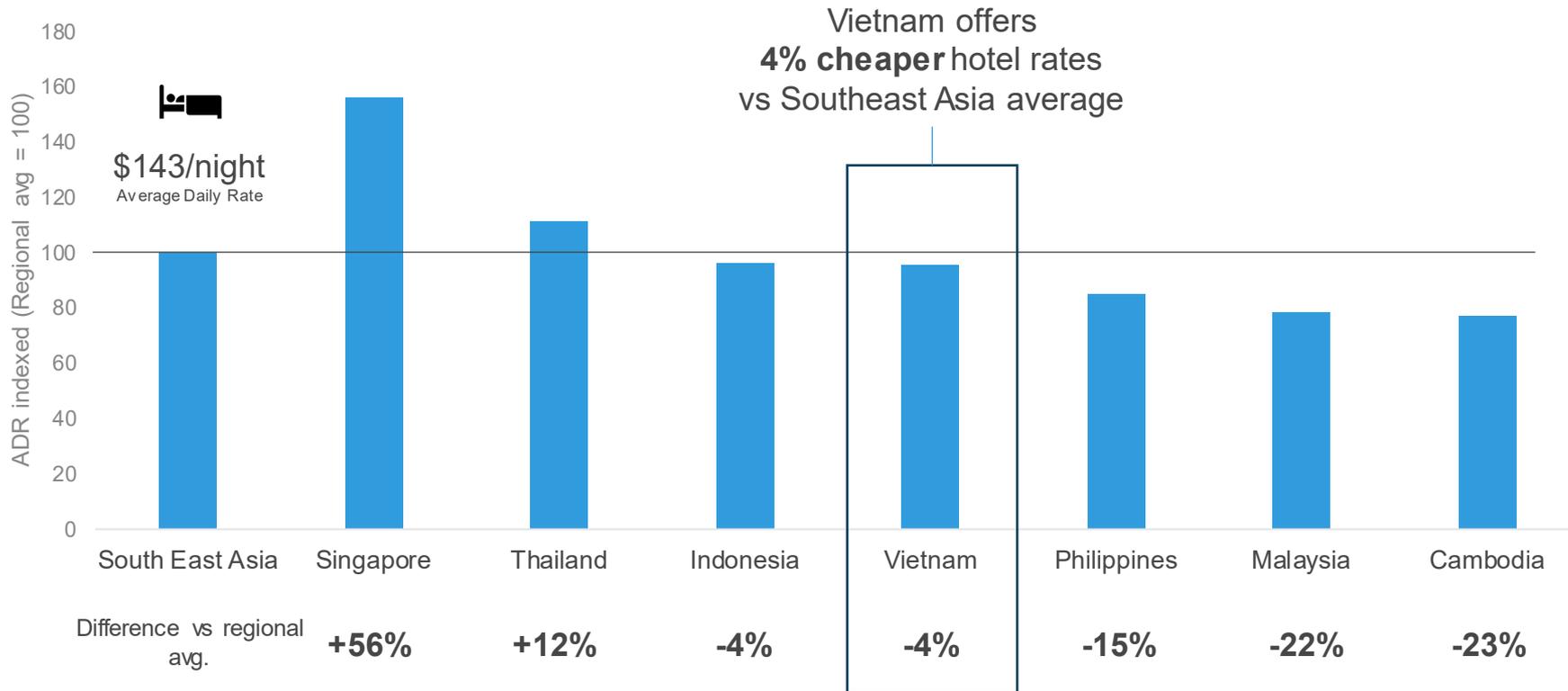
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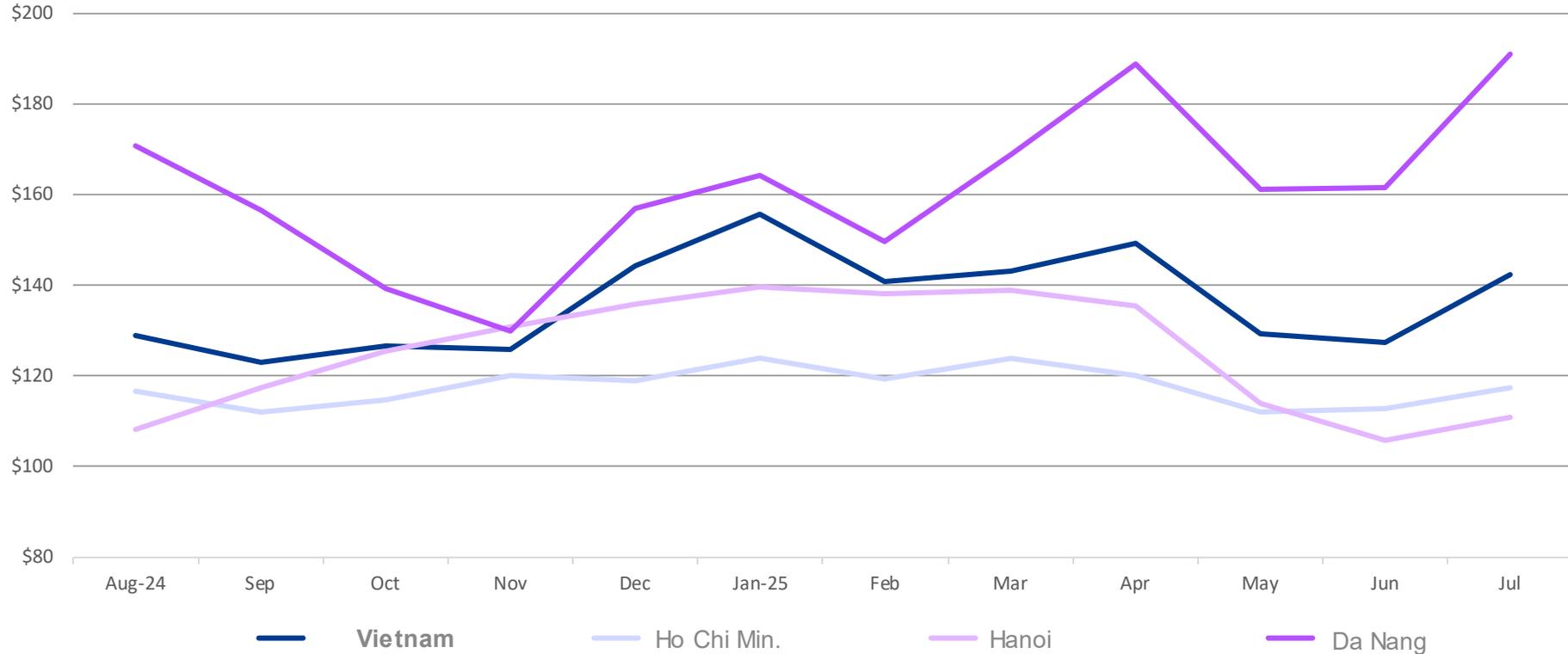
Hotel rates vs regional average

Avg Daily Rates (ADR) for hotel stays between August 2024 and July 2025



Vietnam Focus: Average Daily Rate (ADR) in USD\$

Avg Daily Rates (ADR) for hotel stays between August 2024 and July 2025



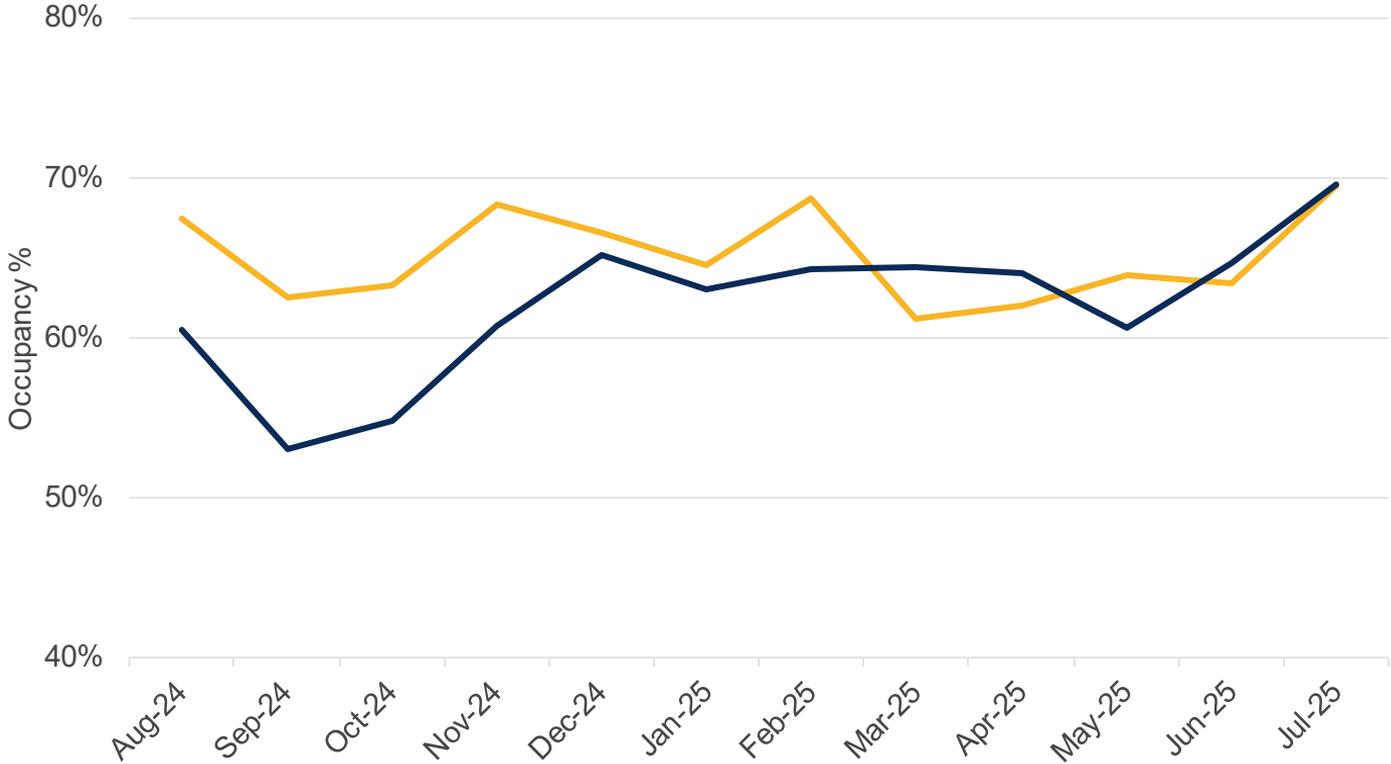
Occupancy Rates: Vietnam vs. Regional Average

Avg Occupancy Rates for hotels in South East Asia between August 2024 and July 2025

**Rolling 12-month
average:**

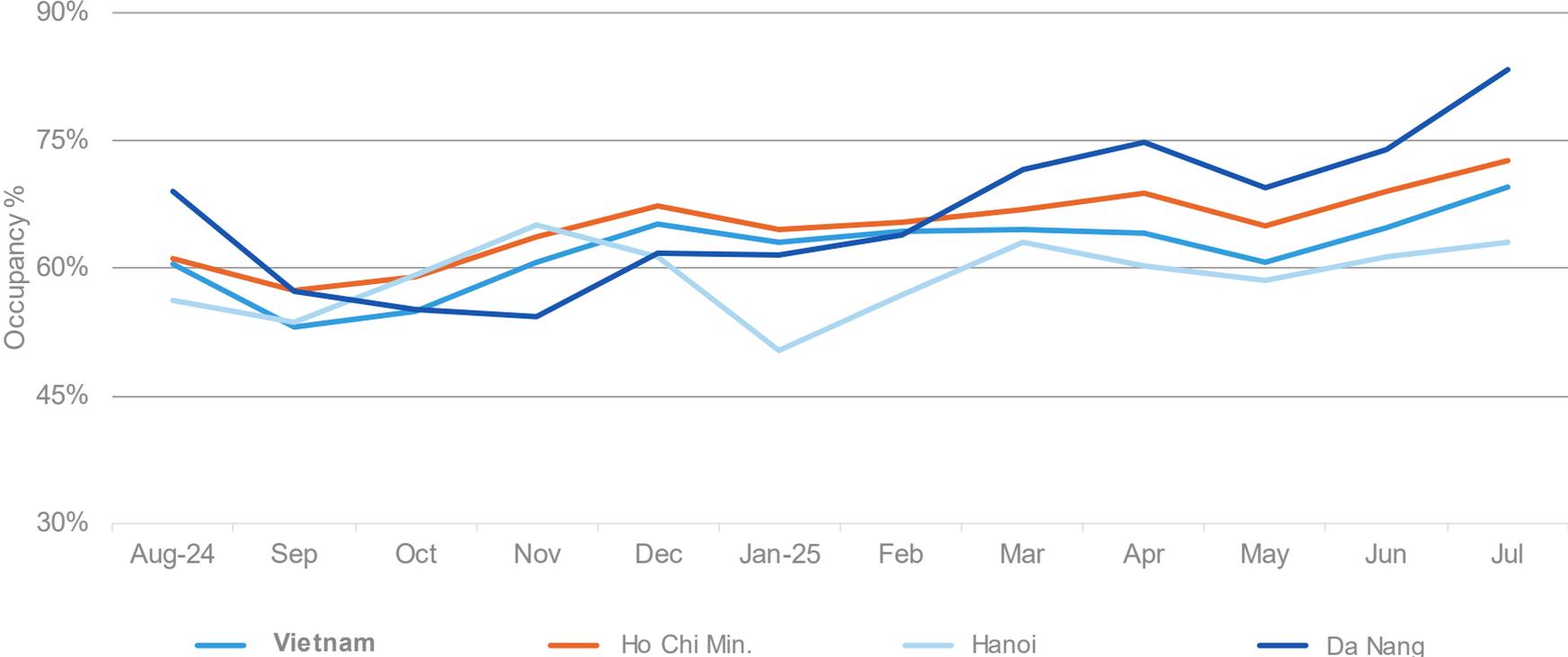
**South East Asia
65%**

**Vietnam
62%**



Hotel Occupancy for the past 12 months

Avg Occupancy Rates for hotels in Vietnam between August 2024 and July 2025



Tourist Profiles

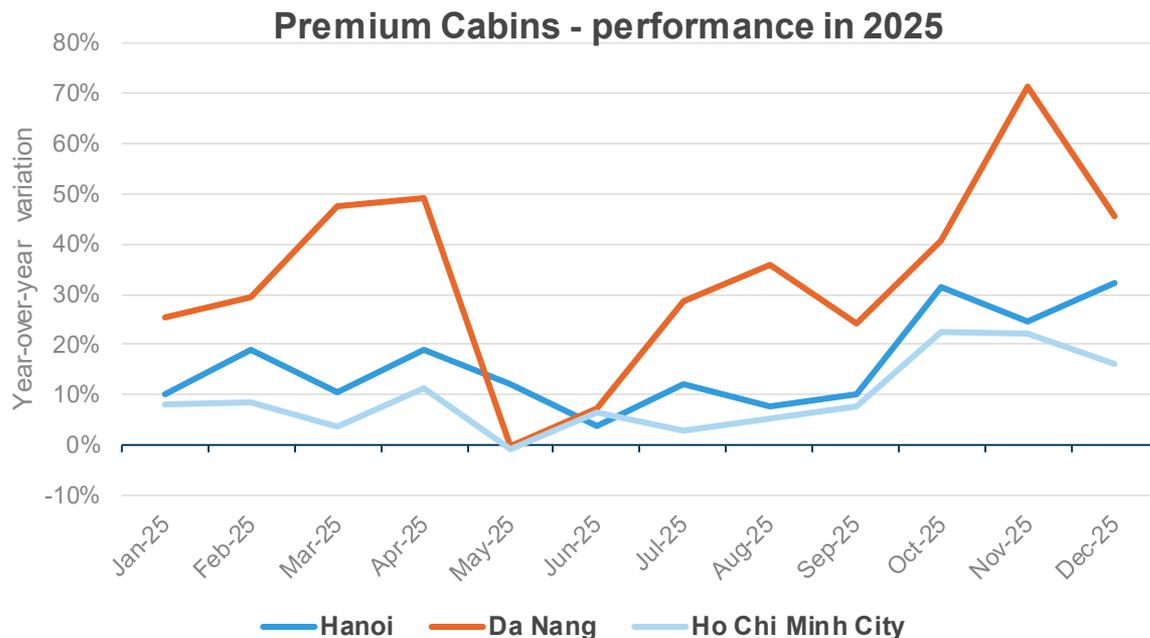
High-value travellers
continue to drive growth

Premium Class Cabins: Tourism growth is driven by high-value travellers

International arrivals to Vietnam in 2025, with air reservations as of 19 August; var vs previous year

Destination	Economy	Premium
Da Nang	+3%	+30%
Hanoi	+13%	+15%
Ho Chi Minh City	+5%	+8%
TOTAL VIETNAM	+6%	+11%

*Premium Class Cabins = Premium Economy, Business & First

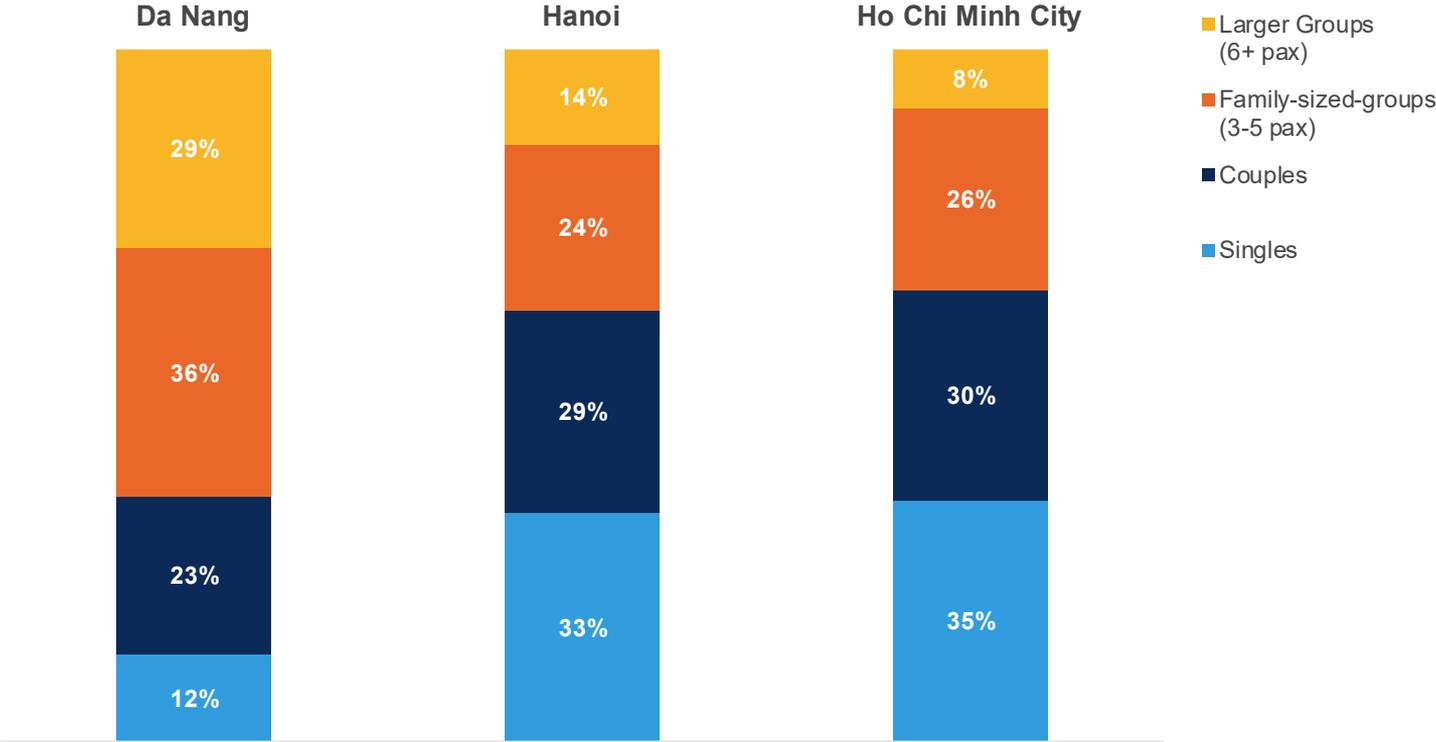


Understand your market

Group Sizes

Distinct destination offerings attract different profiles

International tourist arrivals in 2025; vs 2024

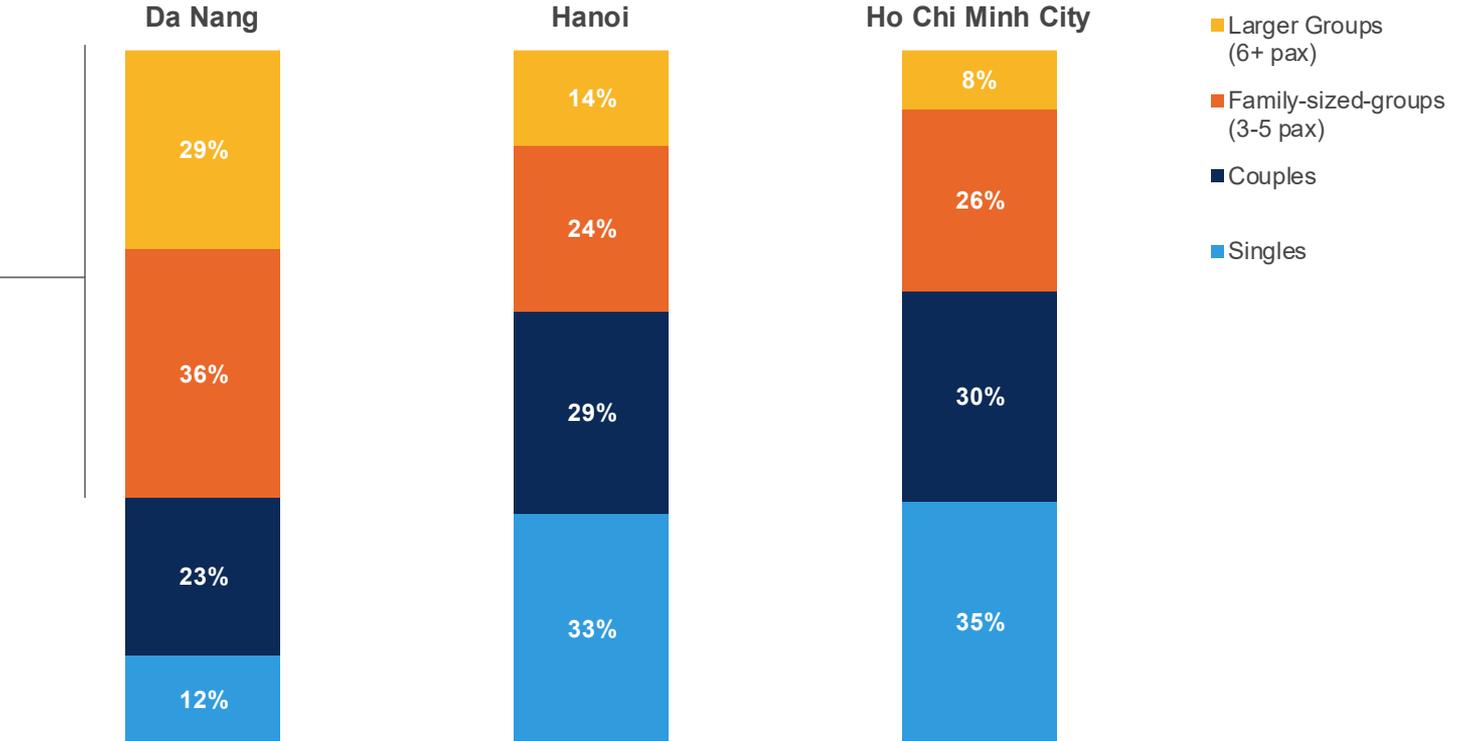


Distinct destination offerings attract different profiles

International tourist arrivals in 2025; vs 2024



Families and Groups are attracted to Sun and Beach

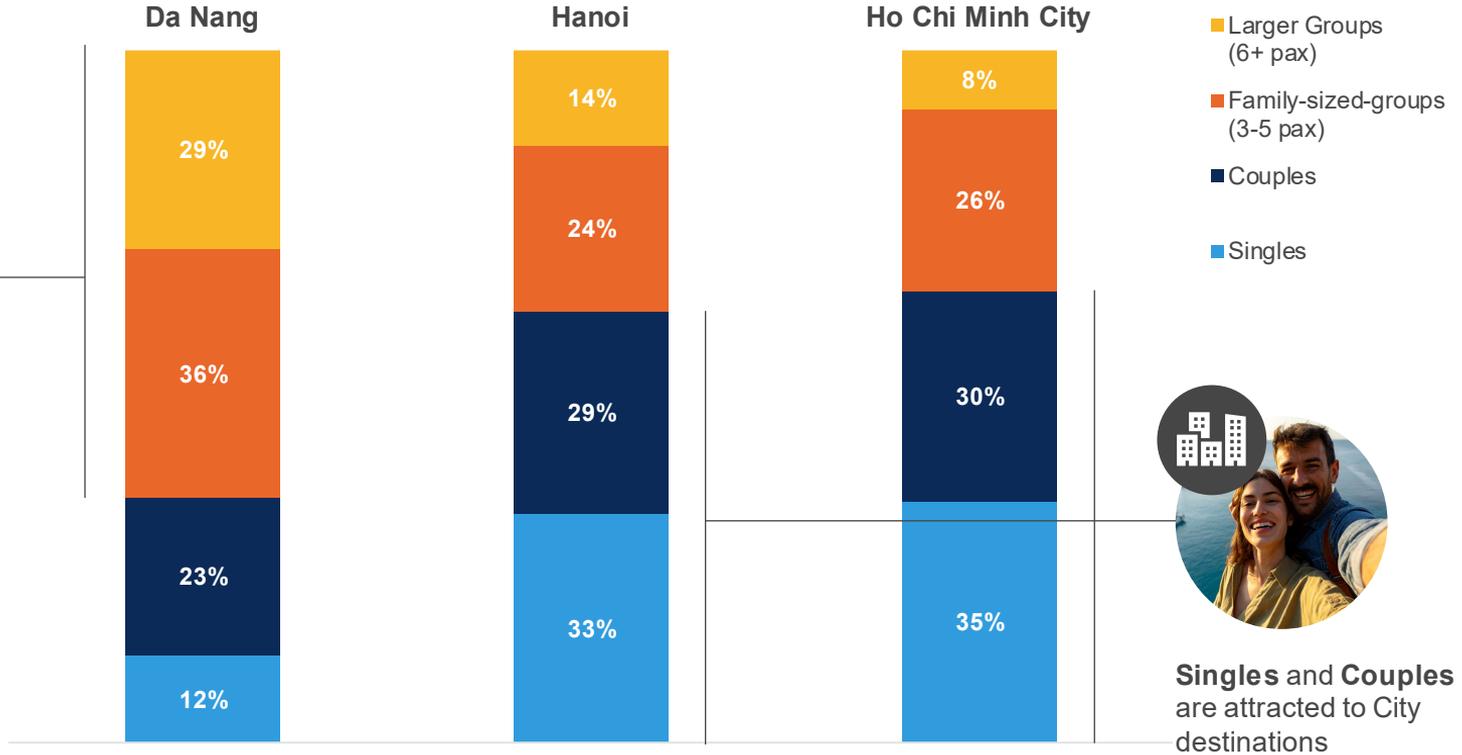


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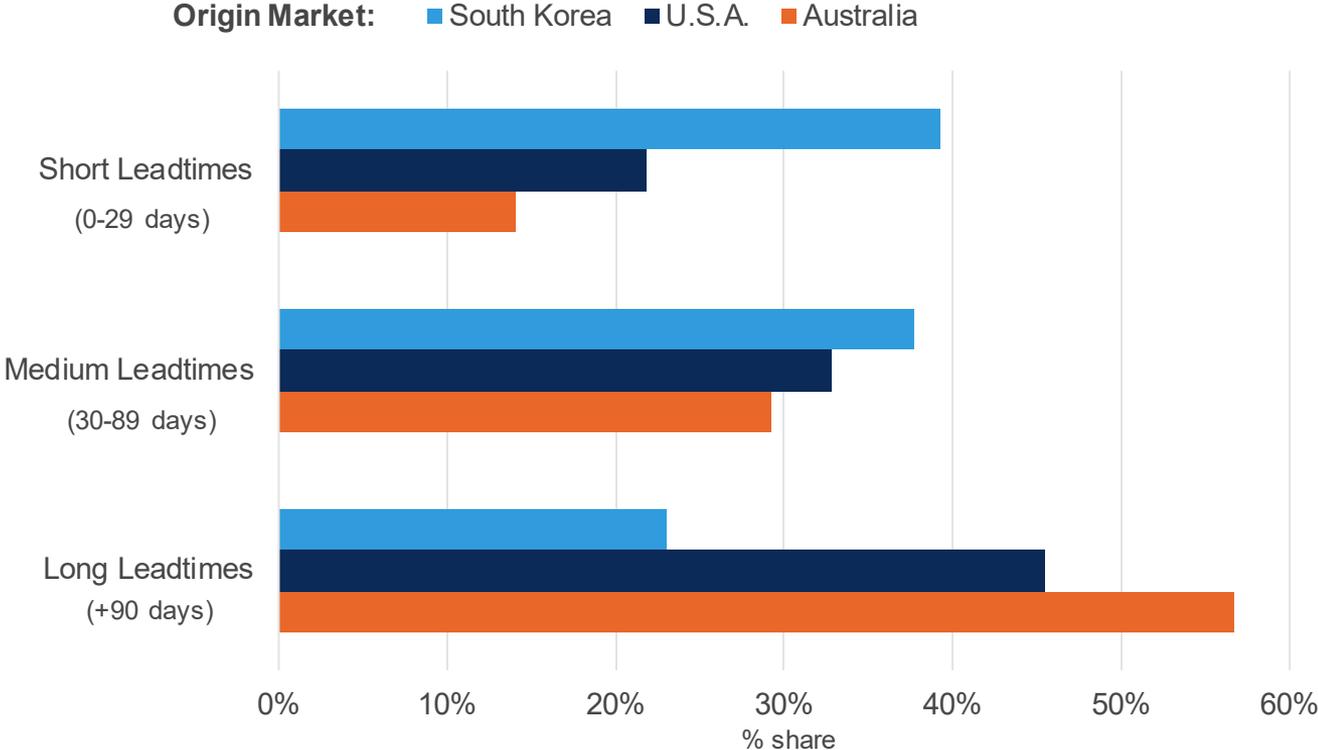


Understand your market

Leadtimes

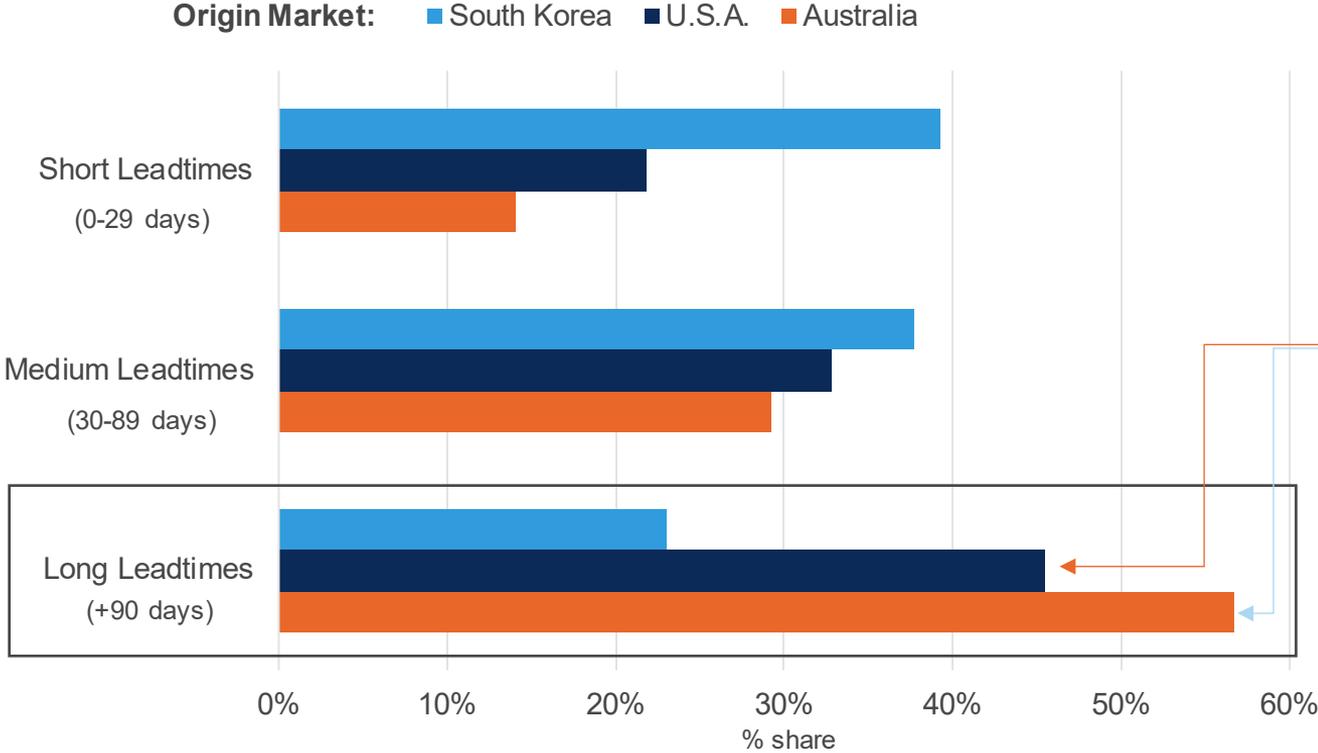
How travel planning varies by origin market

Leadtimes for tourist arrivals to Vietnam between January and June



How travel planning varies by origin market

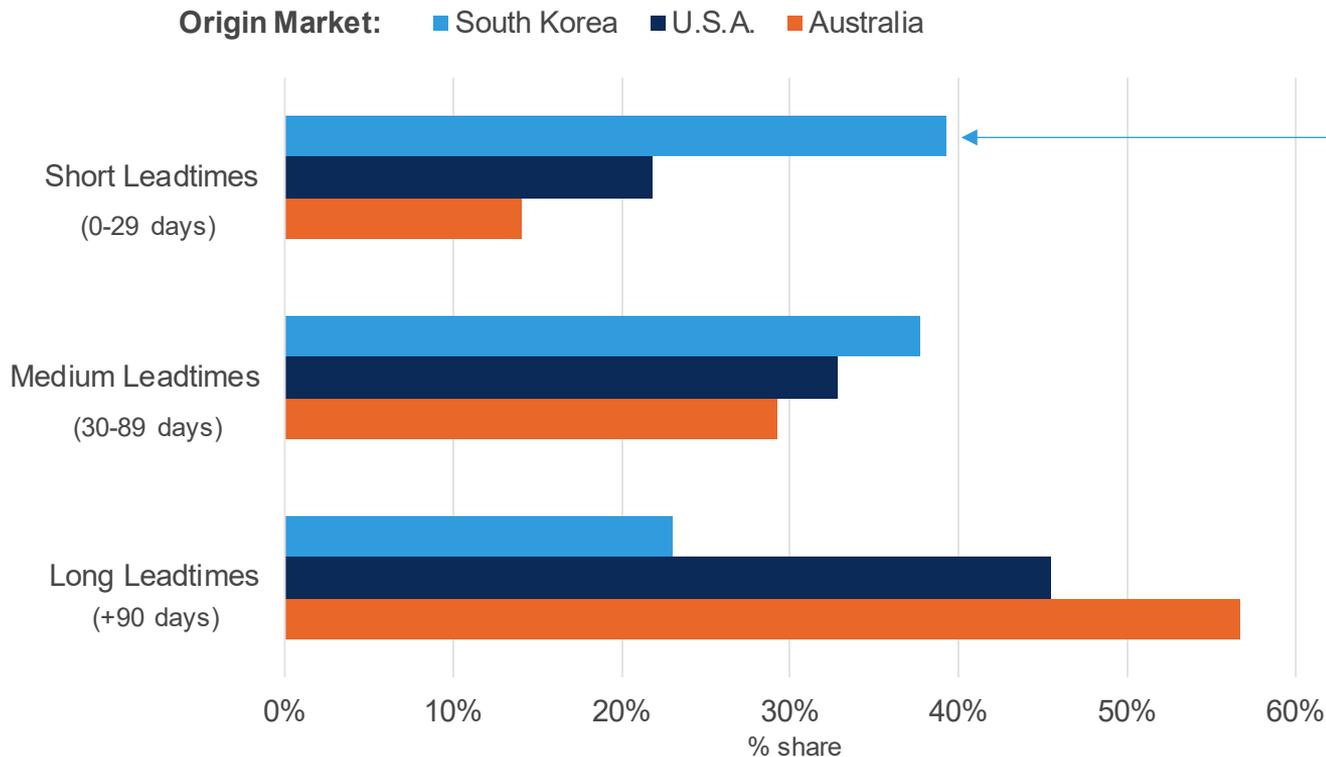
Leadtimes for tourist arrivals to Vietnam between January and June



Australian and US travellers book with greater anticipation

How travel planning varies by origin market

Leadtimes for tourist arrivals to Vietnam between January and June

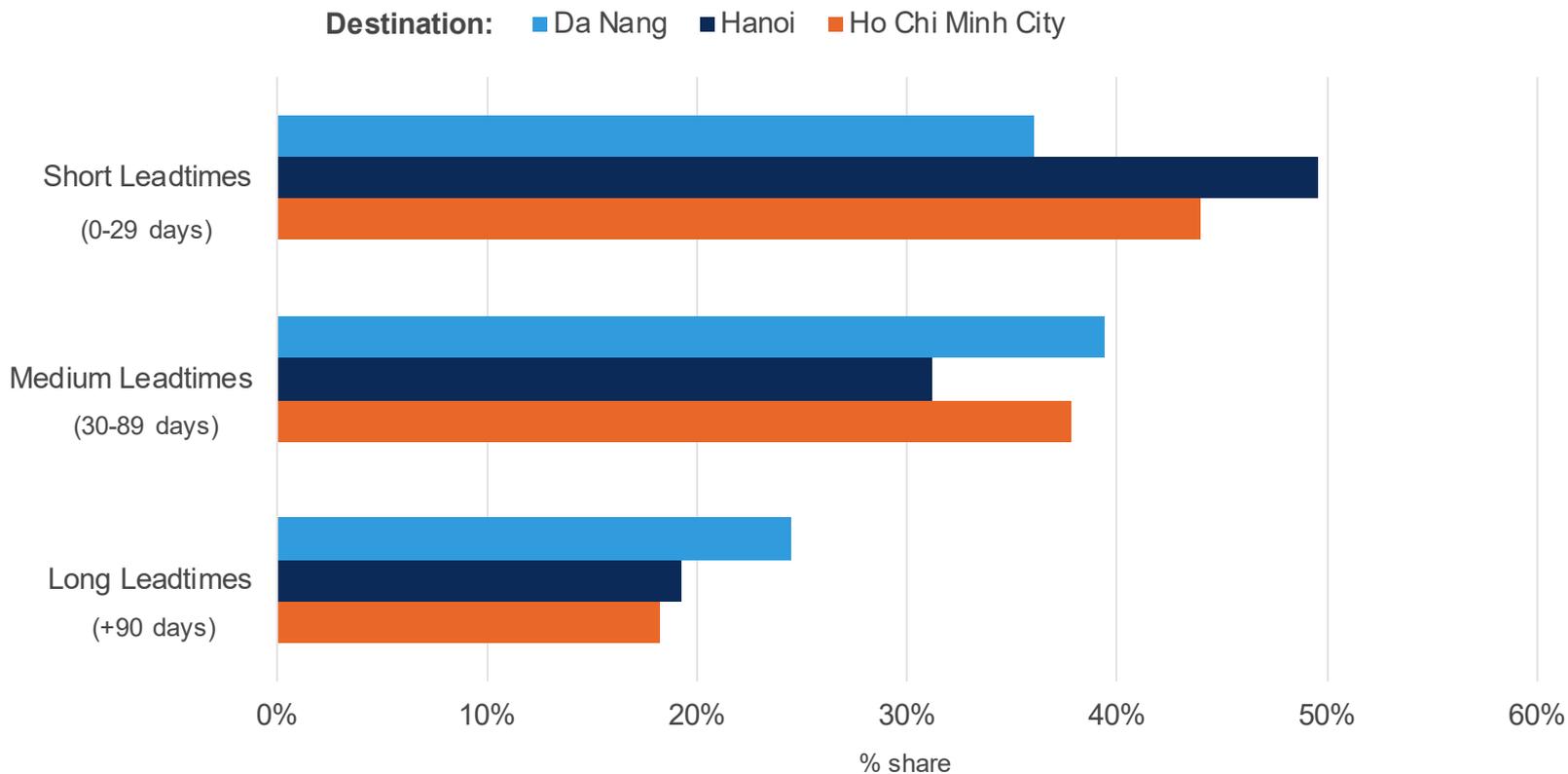


**South Korean
travellers book with
far less anticipation**



South Korea Focus: How travel planning varies by destination

Leadtimes for tourist arrivals to Vietnam from South Korea between January and June



Take-Aways

1

Rising airline capacity supports further growth in travel demand

2

**Intent to travel to Vietnam
is increasing**

3

Affluent travellers are driving demand

4

**Action drives
destination success...
and action should be
driven by data**

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