

***Forward Looking  
Air Passenger Arrivals  
for  
2016 Olympics + Paralympics  
in Rio de Janeiro***

July 2016  
press@forwardkeys.com

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*“Applied traveller operational intelligence to support  
tactical business decisions”*



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# Main Findings

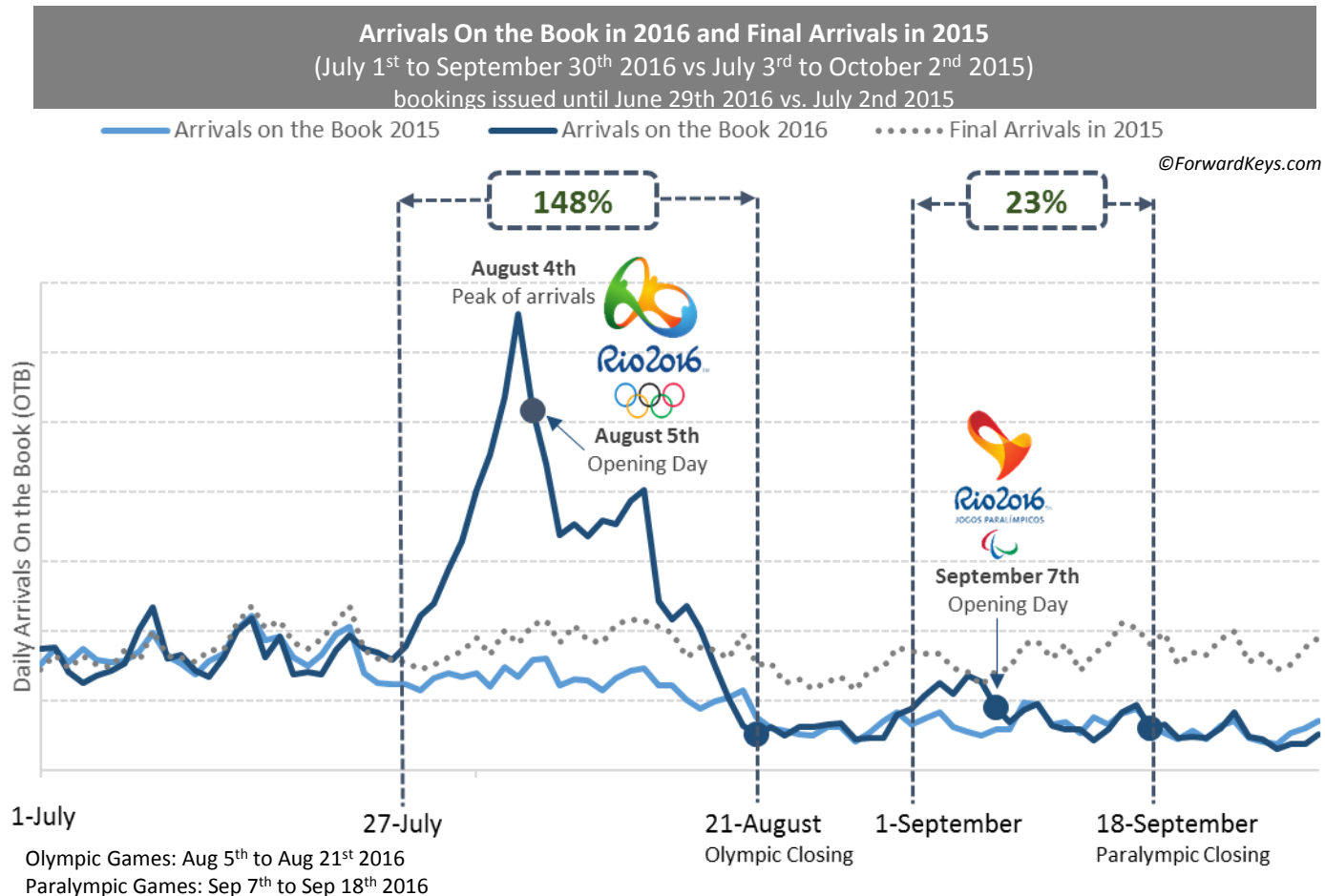
- Forward Bookings issued as of 29<sup>th</sup> June 2016 for arriving in Rio are booming for arrivals starting as early as 27<sup>th</sup> July 2016. The peak arrival date on the book currently is 4<sup>th</sup> August, the day before the Olympic Opening Ceremony.
- Forward bookings for Olympic arrivals between 27<sup>th</sup> July to 21<sup>st</sup> August 2016 are up 148% while Paralympic arrivals between 1<sup>st</sup> and 18<sup>th</sup> September 2016 are up 29%, comparing to the same period last year. **The entire 2016 Olympics + Olympics period (27<sup>th</sup> July to 18<sup>th</sup> September 2016) doubles last year's arrivals on the book.**
- USA market takes over the traditional European source markets, being the dominant source market for the Olympic season. Counting for 18% of total international arrivals in Rio de Janeiro on the book **for the 2016 Olympics + Paralympics period, USA records 2.7 times of its last year's arrivals on the book.**
- 70% of travelers staying 22+ nights in Rio will arrive before August 2<sup>nd</sup> while 70% of travelers staying 14 to 21 nights will arrive before August 8<sup>th</sup>, counting for 8% and 15% of total int'l arrivals in Rio on the Book for the entire Olympic + Paralympic period. The more popular length of stay on the book are 6 to 8 nights and 9 to 13 nights, showing travelers' willingness to enjoy a longer Olympic vacation.
- **Total scheduled international seats to Rio de Janeiro is up 19% comparing the 2016 Olympics + Paralympics period to last year.** Additional seats are scheduled for the Olympics from some US cities (Miami, New York City, Houston, Atlanta), Canada (Toronto), and 4 out of 9 directly connected European airports including Frankfurt, Paris, Lisbon, and London. Aircraft upgrade on Middle East routes can also bring in more passengers.
- Rio will be facing a weak performance after the Olympics and Paralympics from the long-haul markets: forward bookings for total international arrivals between 19<sup>th</sup> September and end of the year are down 13% but bookings from Latin American markets are still up 24% thanks to the supporting Argentina and Chile.

# Forward Looking Int'l Arrivals July-Sep 2016 in Rio de Janeiro

## Arrival Peak One Day Before the Opening Ceremony



- Forward bookings for Olympic arrivals between 27<sup>th</sup> July to 21<sup>st</sup> August 2016 are up 148%, while Paralympic arrivals between 1<sup>st</sup> and 18<sup>th</sup> September 2016 are up 23%, compare to same period last year.
- The peak arrival date on the book currently is 4<sup>th</sup> August, the day before the Olympic Opening Ceremony. Arrivals on the book for 27<sup>th</sup> July to 17<sup>th</sup> August are 1.7 times of last year's final arrivals.

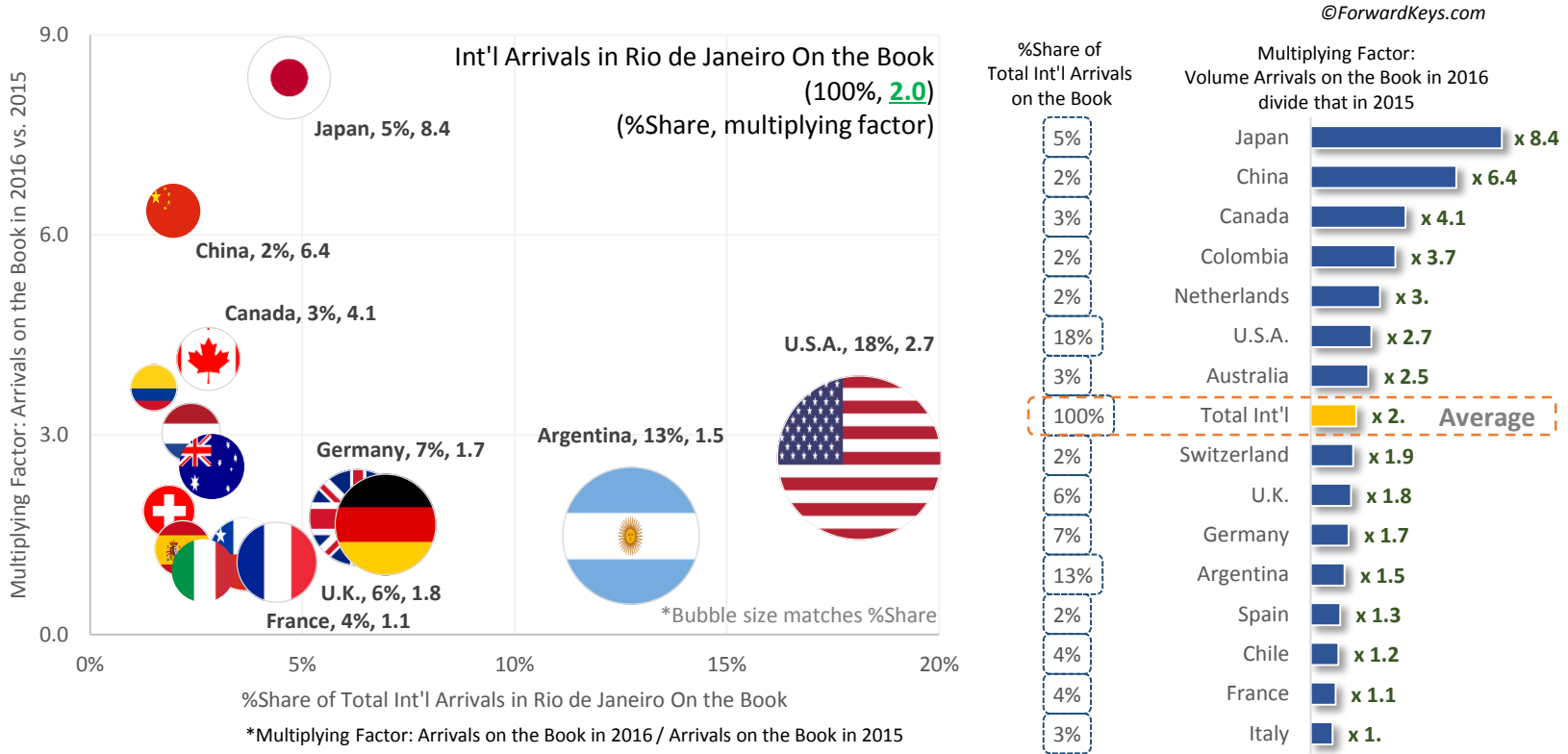


# Forward Looking Int'l Arrivals during 2016 Olympics + Paralympics USA Taking the Visa-Free Chance to visit Brazil and Olympics



- Top 14 Origin Countries together count for 72% of Total International Arrivals on the Book to Rio from July 27<sup>th</sup> to September 18<sup>th</sup>. Considering both market share and multiplying factor for arrivals on the book from Top source markets, USA is in the dominant position of advanced bookings for the Olympic and Paralympic period.

**International Arrivals On the Book; Top 15 Origin Country Performance**  
(July 27th to September 18th 2016 vs. July 29th to September 20th)  
bookings issued until June 29th 2016 vs. July 2nd 2015



# Forward Looking Length of Stay during 2016 Olympics + Paralympics

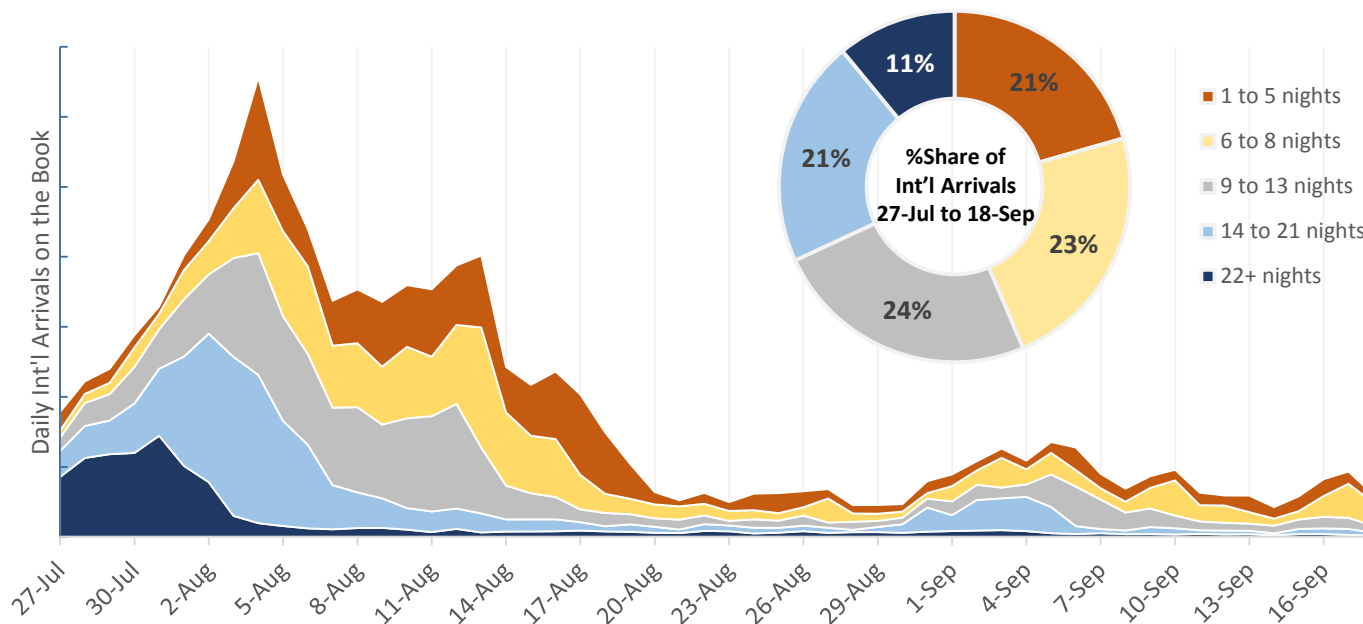
## Early Arrivals Staying Longer to Enjoy Olympics to the Maximum



- 70% of travelers staying 22+ nights in Rio will arrive before August 2<sup>nd</sup> while 70% of travelers staying 14 to 21 nights will arrive before August 8<sup>th</sup>, counting for 8% and 15% of total int'l arrivals in Rio on the Book for the entire Olympic + Paralympic period.
- The more popular length of stay on the book are 6 to 8 nights and 9 to 13 nights, showing travelers' willingness to enjoy a longer Olympic vacation.

**Length of Stay of International Arrivals On the Book in Rio de Janeiro**  
 (July 27th to September 18th 2016 vs July 29th to September 20th 2015)  
 bookings issued until June 18th 2016 vs. June 20th 2015

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Olympic Games: Aug 5<sup>th</sup> to Aug 21<sup>st</sup> 2016  
 Paralympic Games: Sep 7<sup>th</sup> to Sep 18<sup>th</sup> 2016

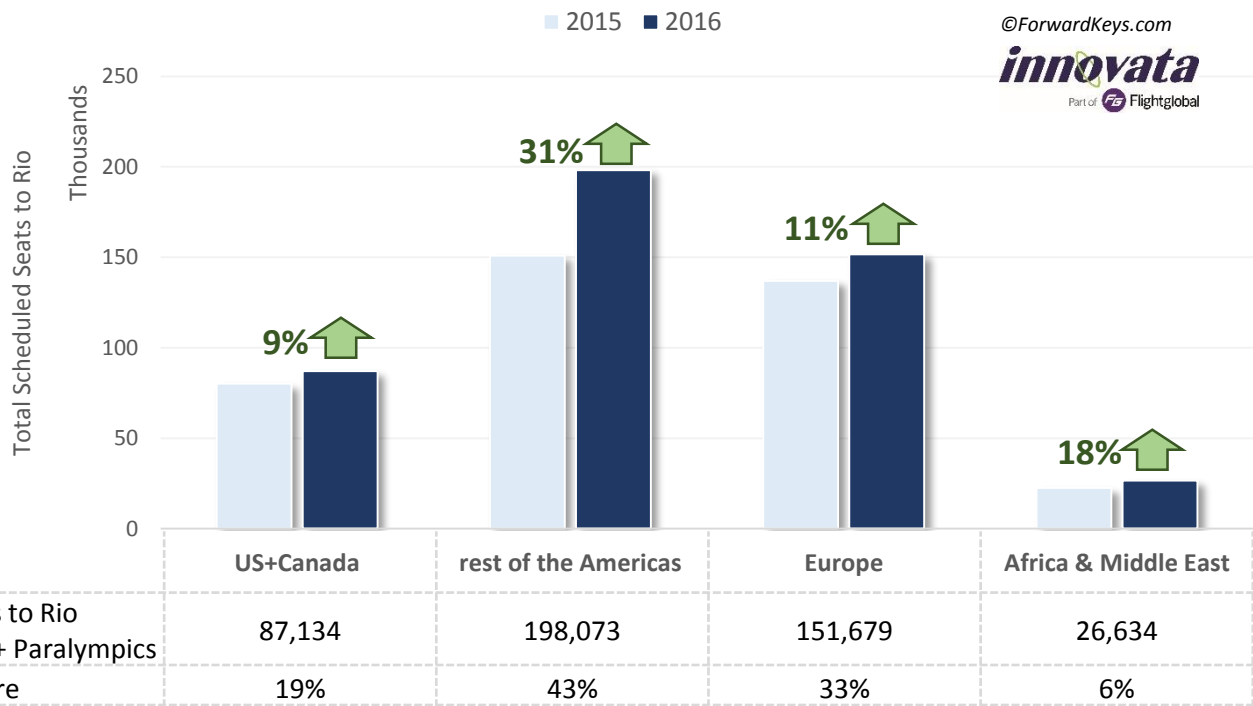
# Int'l Air Capacity to Rio de Janeiro for 2016 Olympics + Paralympics

## International Air Supply Up 19% vs. Prev. Year for Olympics



- Total scheduled international seats to Rio de Janeiro is up 19% comparing the 2016 Olympics + Paralympics period to last year.
- There's no direct capacity between Asia Pacific and Rio de Janeiro; the Top 5 transit hubs for Asia Pacific travelers to Rio for Olympics and Paralympics are Dubai, Santiago, New York City, Sao Paulo, and Frankfurt.

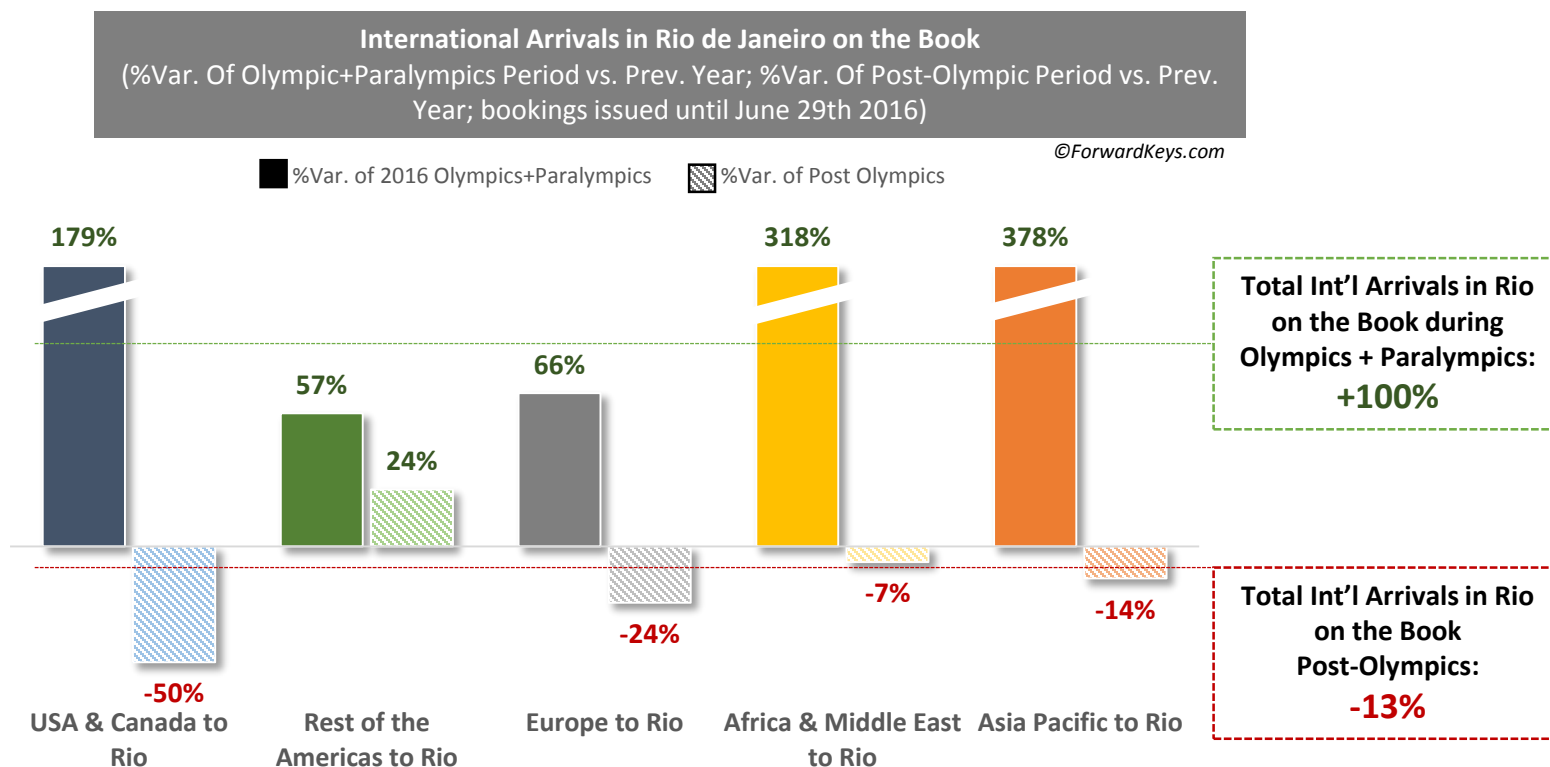
**Total Scheduled International Seats to Rio de Janeiro for Olympic + Paralympic Period**  
 (%Var. Of Scheduled Seats during July 27th to September 18th 2016 vs July 29th to September 20th 2015)



# Forward Looking Int'l Arrivals in Rio on the Book until 2016 Year End Only Intra-Latin-America Bookings are Positive for Post Olympics



- As of June 29<sup>th</sup>, forward bookings for post Olympic period shows a decrease of 13% comparing to previous year, USA and Canada topping the decline with a negative 50%.
- Thanks to the outstanding Argentina and Chile market, forward bookings from Latin America to Rio for post Olympic period are still up 24%.



\*%Var. of USA&Canada, Africa&Middle East, Asia Pacific during Olympic+Paralympic Period is out of scale.

Olympic + Paralympic Period: 27<sup>th</sup> July to 18<sup>th</sup> September, 2016

Post-Olympic Period: 19<sup>th</sup> September to 31<sup>st</sup> December, 2016

Geographical category follows UNWTO definition.

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# Methodology and Glossary



- ▶ This analysis is based on Air Reservation Data property of ForwardKeys® as of July 1<sup>st</sup> 2016. Database contains reservations handled by more than 200 000 online and offline travel agencies worldwide. This study includes reservations processed until **June 29<sup>th</sup> 2016**.
  
- ▶ **Perimeter:**
  - ▶ Destination: Rio de Janeiro.
  - ▶ Source Market: Total International bookings including domestics.
  - ▶ Period:
    - ▶ **Arrivals on the Book**: Arrival dates from **July 1<sup>st</sup> to September 30<sup>th</sup> 2016** based on issued bookings as of June 29<sup>th</sup> 2016 compared with arrival dates the same weeks (July 3<sup>rd</sup> to October 2<sup>nd</sup> 2015) with the same length of booking period.
    - ▶ **2016 Olympic + Paralympic period** is defined as from July 27<sup>th</sup> to September 18<sup>th</sup> 2016.
  - ▶ Lengths of Stay: Current analysis includes only those reservations staying at least 1 night at destination, therefore excluding transits, day trips or one way trips.
  
- ▶ **Arrivals** refer to the number of airline passengers arriving at the destination within a specific time frame.
  
- ▶ **Arrivals on the Book (OTB Arrivals)** refer to the number of airline passengers arriving at the destination within a specific future time frame according to the bookings that have been issued as noted.

*The content and the data provided in this document are for information only.*