

Air Travel Trends for Inbound Iran

 January 2017

"Know tomorrow's travellers"



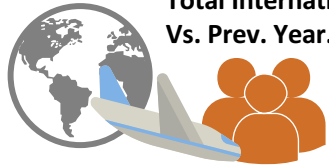


International Arrivals & International Air Capacity to Iran: 2012 to 2016

- Iran has seen three years in a row with double-digit growth in international arrivals and scheduled international air capacity.

International Arrivals in Iran & Scheduled Seats of International Flights, Yearly %Variations 2012 – 2016

Total International Arrivals Vs. Prev. Year.



Total Scheduled Seats On International Flights Vs. Prev. Year.



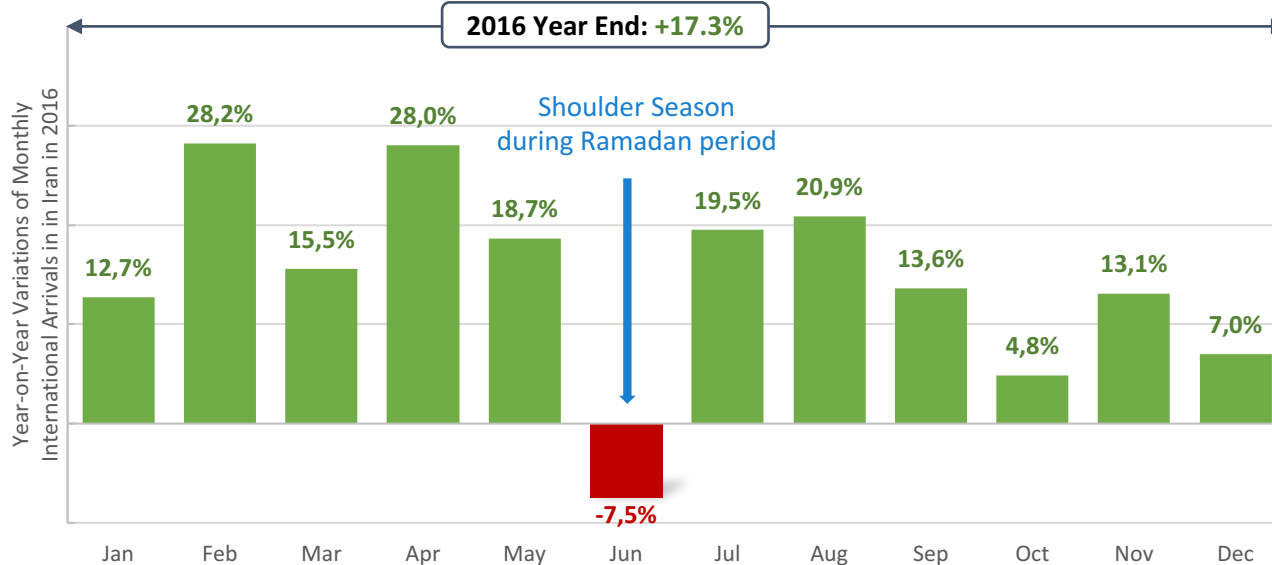
1st January to 31st December of 2012 to 2016 vs. previous year.



International Arrivals in Iran in 2016

- International arrivals in Iran enjoyed positive monthly growth throughout 2016, except in June. The drop in June and higher than average peaks in May and July were partly due to the timing shift of Ramadan, which fell 12 days earlier in 2016 than 2015.

Monthly %Variations of International Arrivals in Iran, 2016 vs. 2015



Ramadan Dates:

2015 June 18th – July 17th

2016 June 6th – July 5th



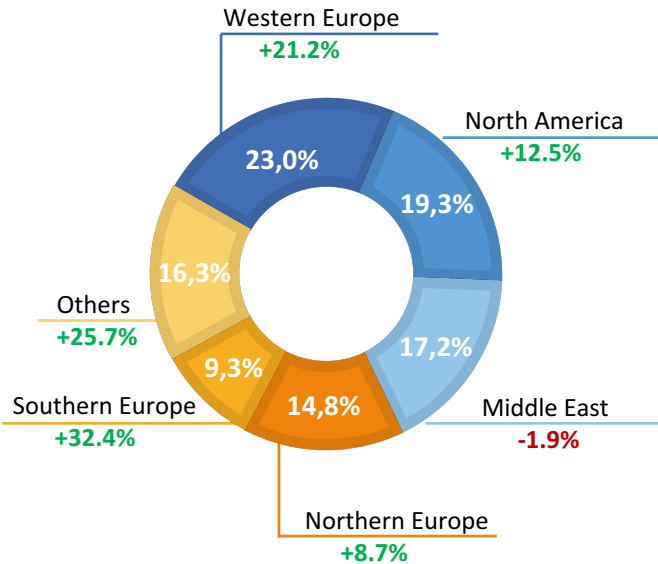
International Arrivals in Iran in 2016: Top Source Markets

- Key source regions for Iran are Europe, North America and the Middle East, together contributing 83.7% of international arrivals in 2016. Among the Top 12 origin countries, only Pakistan and China were outside the key source regions. Traveler profiles for these two origins are very different: 40% of Chinese travelers to Iran in 2016 were for business, while Pakistan only saw 5%.

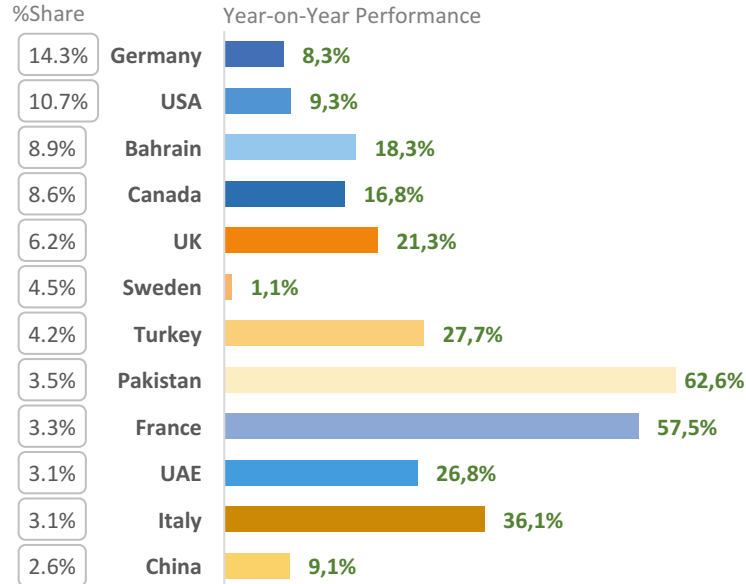


Top Performers among International Arrivals in Iran in 2016

Top 5 Origin Sub-Continents



Top 12 Origin Countries



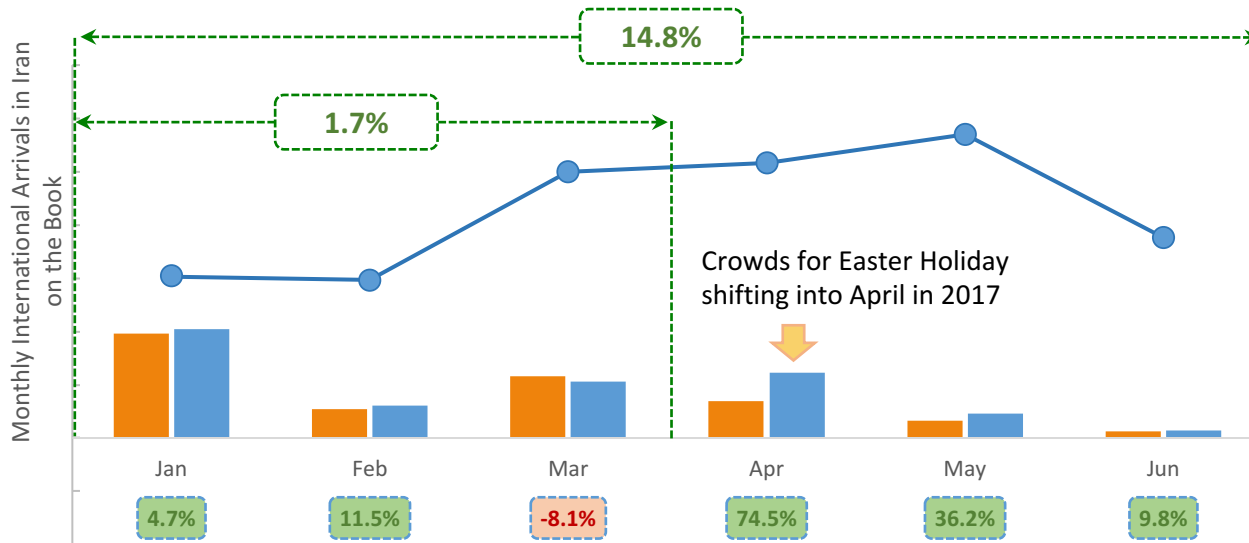
1st January to 31st December 2016 vs. 2015
 Geographical categories follow UNTWO definitions



Forward Looking International Arrivals in Iran January to June 2017

- Forward bookings for the first half of 2017 are 14.8% ahead, based on issued bookings as of 1st January 2017. The negative variation in March and the strong positive variation in April is due to the timing of Easter, which falls three weeks later in 2017.

International Arrivals in Iran On the Book for January to June 2017



Easter Sunday:

2016 March 27th

2017 April 16th

Arrivals on the Book for 1st Jan to 30th June 2017 based on issued bookings as of 1st Jan 2017 vs. same period the previous year.

Arrivals on the Book in 2016

Arrivals on the Book in 2017

Final Arrivals in 2016

%Variation of Arrivals on the Book for 2017 vs. 2016

Forward Looking International Arrivals in Iran Jan to Jun 2017: Highest Growth Source Markets



- Key origin region has not changed comparing forward bookings to the 2016 final arrivals, while top performers in terms of year-on-year variations reflects the importance of air connectivity improvement to boost arrivals:
 - Italy is benefiting from Alitalia and Iran Air tripling their scheduled seats since Nov-2016
 - The Netherlands is connected by one more daily flight from Amsterdam to Tehran by KLM since Oct-2016
 - An increasing volume of Belgian travelers are using Amsterdam to transfer to Iran, while Swiss travelers tend to route via Vienna, from where Austrian Airlines is doubling the scheduled seats during H1 2017.

Traveler Profile On the Book for January to June 2017: Highest Growth Source Markets

Highest Growth Origin Markets	%Var. of Total Arrivals OTB vs. Prev. Year	Average Length of Stay (Nights)	Average Pax per Booking (Persons)
Italy	+125.9%	9.9	8.1
Belgium	+81.3%	15.5	5.2
Pakistan	+74.2%	26.4	7.0
Switzerland	+34.9%	9.9	2.5
Netherlands	+32.7%	14.2	2.5



Arrivals on the Book for 1st Jan to 30th June 2017 based on issued bookings as of 1st Jan 2017 vs. same period the previous year.

Methodology & Glossary

This analysis is based on Air Reservation Data, property of ForwardKeys®, as of 10th January 2017. Database contains reservations handled by more than 200,000 online and offline travel agencies worldwide

DESTINATION



Iran

MARKET



Worldwide

PERIOD



Arrivals: 1st January to 31st December 2016 vs. 2015

Arrivals On The Book: 1st January to 30th June 2017 vs. 2016

Capacity: 1st January to 30th June 2017 vs. 2016

Lengths of stay: At least 1 night in the destination



Arrivals: refer to the number of airline passengers arriving in the destination within a specific time frame.

Arrivals on the Book (Arrivals OTB): refer to the number of airline passengers arriving in the destination within a specific future time frame according to the bookings that have been issued.

Departures: refer to the number of airline passengers departing from any location within a specific time frame.

Departures on the Book (Departures OTB): refer to the number of airline passengers arriving in the destination within a specific future time frame according to the bookings that have been issued.

Bookings: represent air reservations made for travel to the specific destination (i.e. Iran) for any date of travel.

Capacity: reflects the volume of passengers that can fly between one destination and another using direct, scheduled commercial flights.

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