

A stylized world map in shades of blue and white. A yellow location pin is placed over South America. White arrows indicate travel routes across the continents. A white location pin is also visible over Europe. The map is set against a light blue background.

**GRANADA**

**7TH SUMMIT OF  
TRAVEL AGENCIES  
ASSOCIATIONS**

**8 – 10 November 2023**

**Juan A. Gomez Garcia**  
**Head of Market Intelligence, ForwardKeys**

**Recovery of Tourism around the World**  
**Tourism resilience in the current geopolitical environment**

## 2023 IN REVIEW: 10 OUT OF 20 BEST PERFORMING DESTINATIONS ARE EUROPEAN

International arrivals in 2023; vs 2019



Ranking 2023	Destination	2023 vs 2019	Ranking 2023	Destination	2023 vs 2019
1	Dominican Republic	+14%	11	India	-11%
2	Colombia	+5%	12	Spain	-11%
3	Mexico	+5%	13	Ireland	-15%
4	Greece	+3%	14	France	-16%
5	Saudi Arabia	=0%	15	Canada	-18%
6	Portugal	-1%	16	Switzerland	-18%
7	Argentina	-3%	17	United Kingdom	-19%
8	United Arab Emirates	-7%	18	Italy	-19%
9	Turkiye	-9%	19	Brazil	-21%
10	Egypt	-10%	20	Netherlands	-26%

■ Europe
 ■ Americas
 ■ Asia Pacific
 ■ Middle East & Africa



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# OUTBOUND MARKETS SHOW UNEVEN RECOVERY: USA LEADS, EUROPE ADAPTS, APAC STRUGGLES

International arrivals in 2023; vs 2019



Origin	Share 2019	Share 2023	Growth vs 2019
Europe	45%	47%	-9%
Asia Pacific	28%	21%	-33%
Americas	17%	19%	-1%
Africa + Middle East	10%	12%	+5%

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# Departures

Time	Flight	To/From	Date	Starting	Status
20:10	TP 404	Nice	03		Cancelled
20:15	EZY2370	London	22	19:32	Cancelled
20:25	VL88101	Madrid	07	20:05	Cancelled
20:35	IB 3105	Madrid	17	19:45	Cancelled
21:05	VL85103	Barcelona	14	20:35	Cancelled
21:20	TP 1885	Madeira			Cancelled
21:25	WU 1648	Birmingham	14	20:45	Cancelled
21:50	TP 495	Paris		19:20	Cancelled
21:50	TP 48	Paris			Cancelled
21:50	TP 41	Paris			Cancelled
21:55	TP 4	Paris			Cancelled
21:55	TP	Paris			Cancelled
21:55	WU	Paris			Cancelled
22:50	TP	Paris			Cancelled
23:55	TP	Paris			Cancelled



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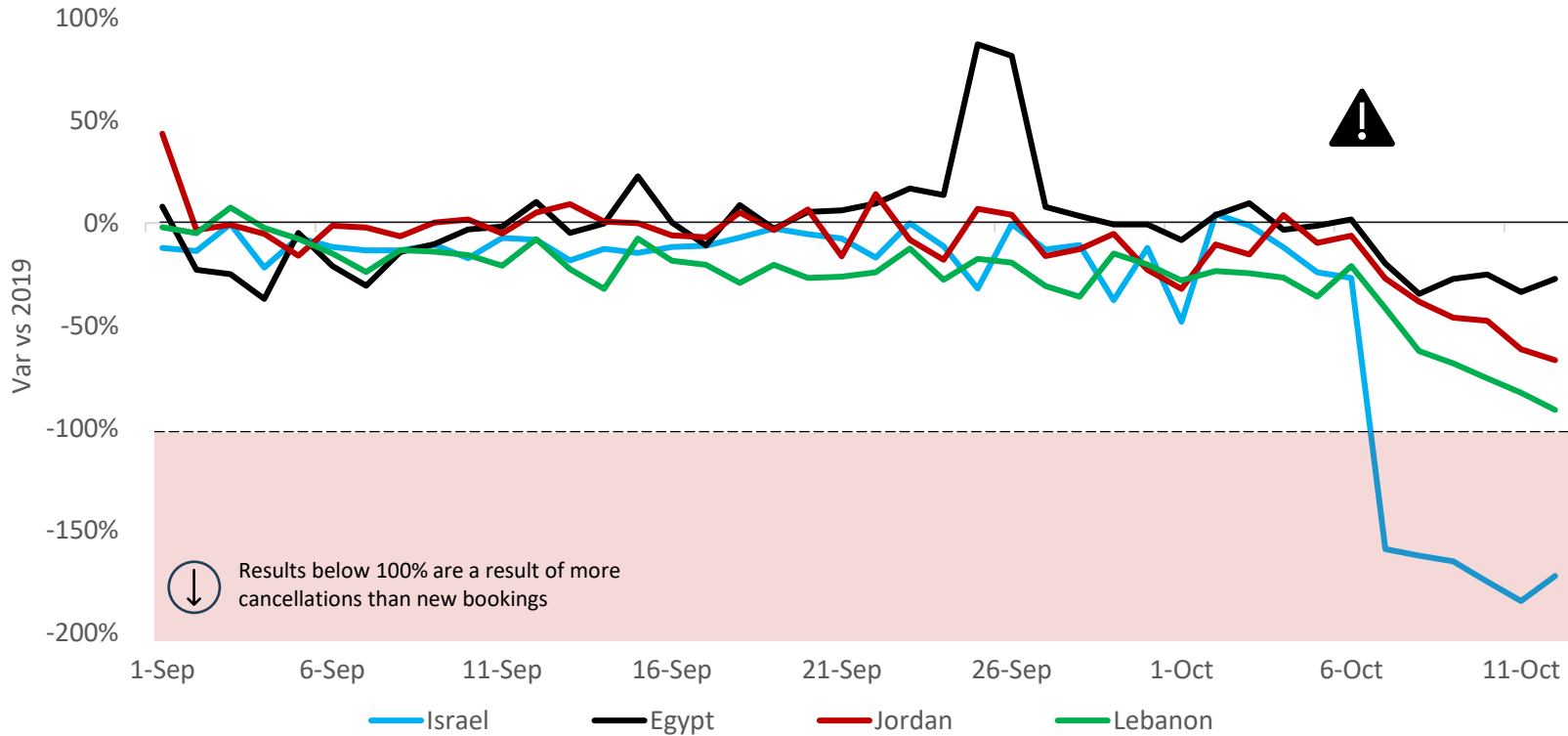
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# SHARP DECLINE IN NEW BOOKINGS POST ISRAEL-HAMAS CONFLICT

Tickets issued between Sept and Oct for all future travel to Israel and neighboring countries; vs 2019



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Source: ForwardKeys Actual Air Tickets

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# Southern Europe lost **3%** market share of August flight searches vs. Northern Europe

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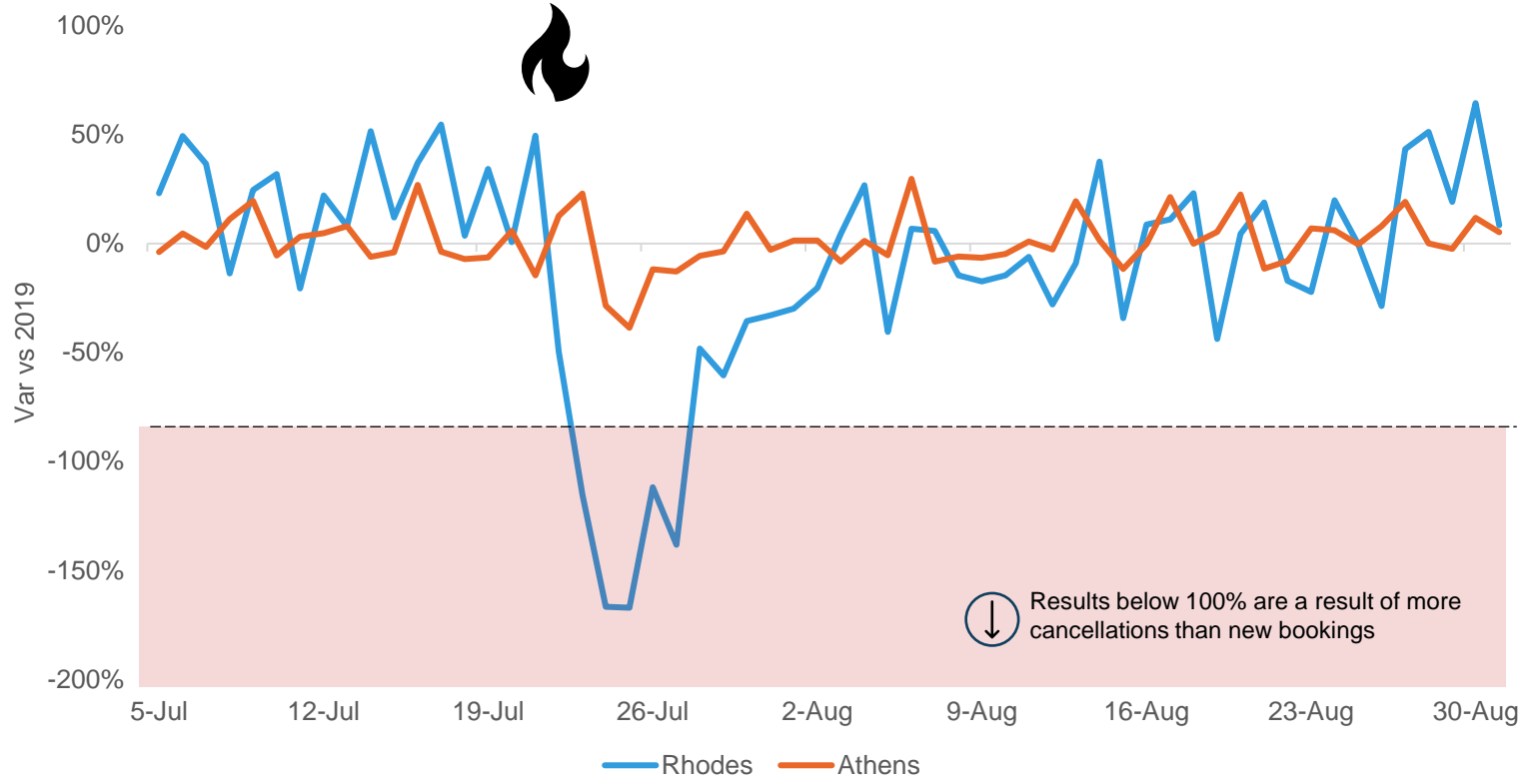
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# TRAVEL INDUSTRY CONTINUES SHOWING GREAT RESILIENCE

Tickets issued between 5 Jul and 31 Aug for all future travel to Greece; var vs 2019



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Source: ForwardKeys Actual Air Tickets

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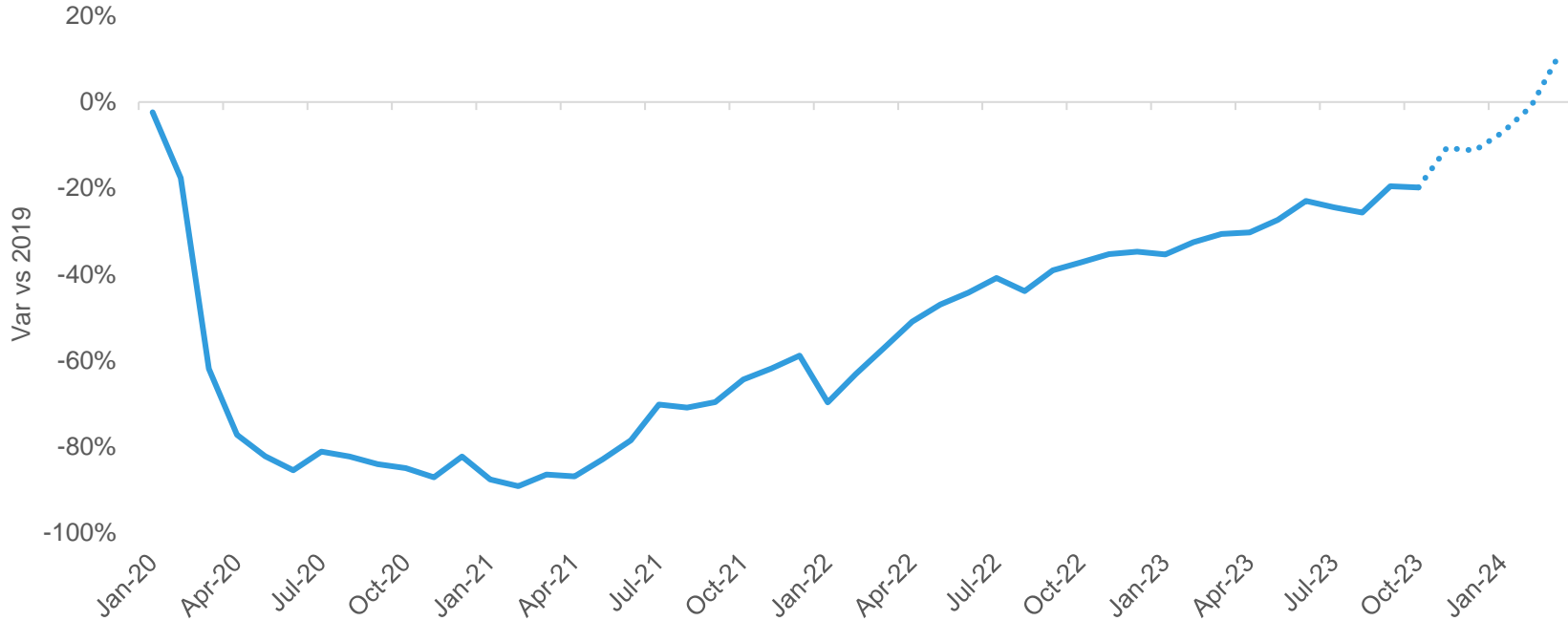


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# GLOBAL RECOVERY ACCELERATES TOWARDS YEAR END

International arrivals between Jan 2020 and Mar 2024; vs 2019



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Source: ForwardKeys Actual Air Tickets

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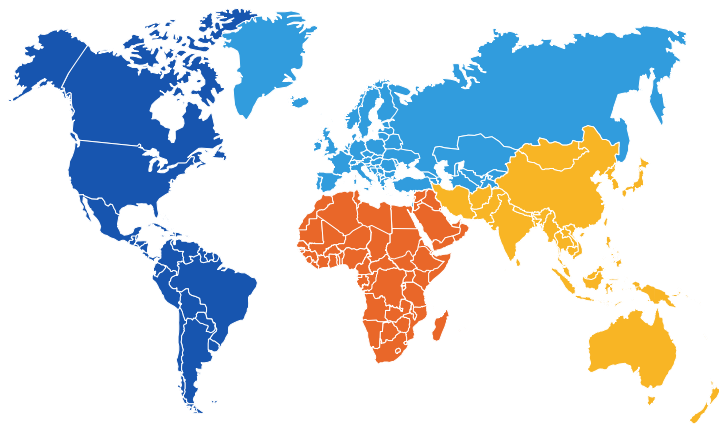
# GLOBAL RECOVERY ACCELERATES TOWARDS YEAR END

International worldwide arrivals in 2023 and Q1 2024, as of 25 October; vs 2019



## Total International Inbound

**-25%**  
2023



**The Americas**  
2023: -14%

**Africa & Middle East**  
2023 : -12%

**Asia Pacific**  
2023 : -42%



## European International Inbound

**-22%**  
2023



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Source: ForwardKeys Actual Air Tickets

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# INTERNATIONAL TRAVEL BACK TO PRE-PANDEMIC LEVELS IN Q1 2024

International worldwide arrivals in 2023 and Q1 2024, as of 25 October; vs 2019



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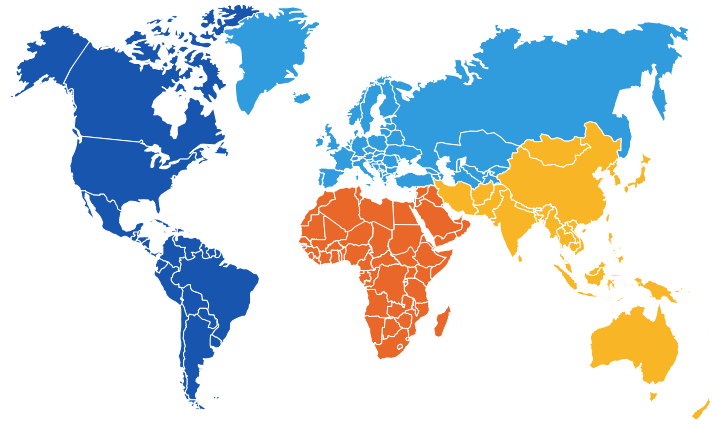
## Total International Inbound

**-25%**

2023

**-1%**

Q1 2024 (Jan-Mar)



### The Americas

2023: -14%

Q1 2024: +8%

### Africa & Middle East

2023: -12%

Q1 2024: +18%

### Asia Pacific

2023: -42%

Q1 2024: -14%



## European International Inbound

**-22%**

2023

**+1%**

Q1 2024 (Jan-Mar)



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