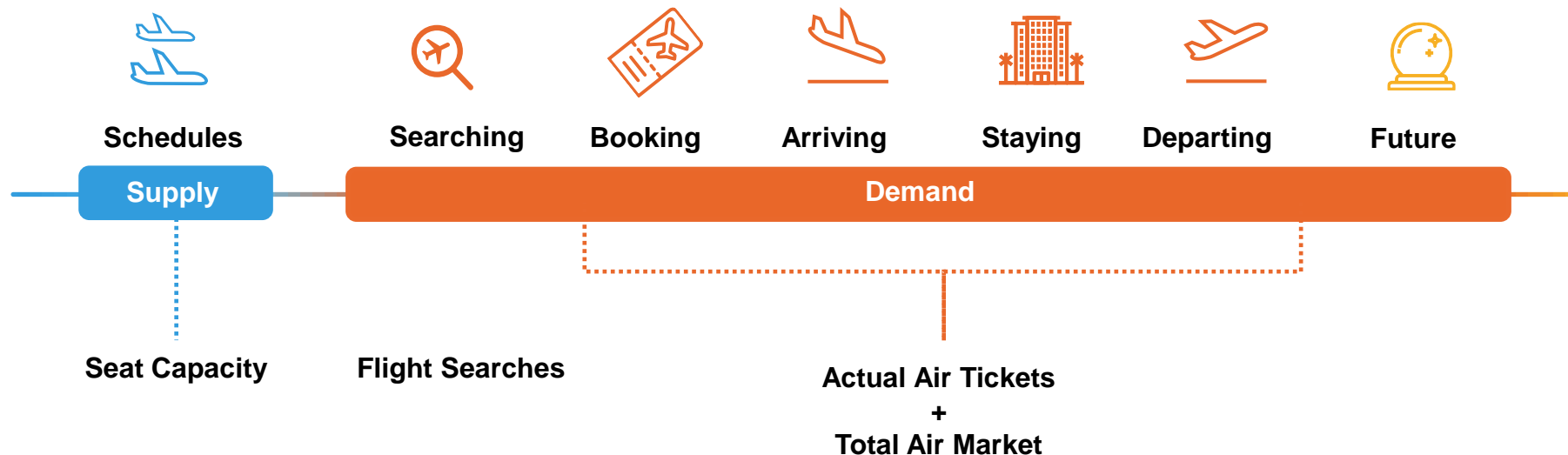


# Trends and stats: The state of play for European tourism

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

March 2023

# FORWARDKEYS DATA CAPTURES AND REFLECTS THE ENTIRE TRAVELLER JOURNEY



# Global outlook



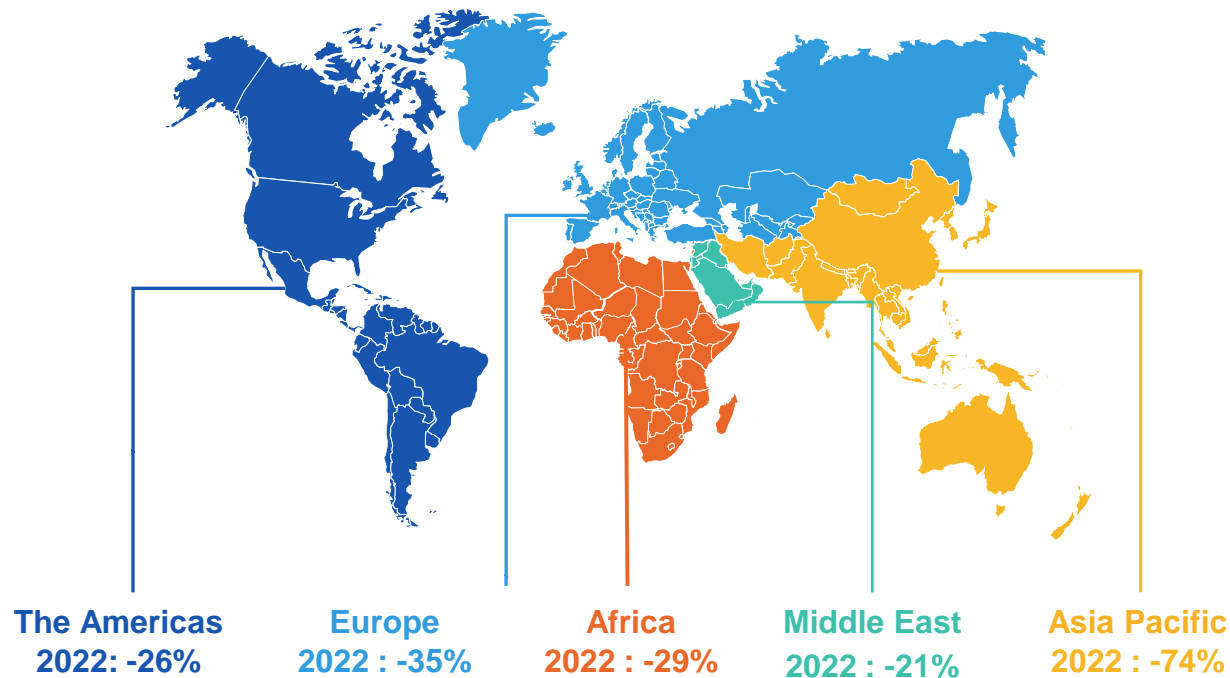
ForwardKeys

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#ForwardKeys



# GLOBAL RECOVERY STAYED UNEVEN IN 2022

International worldwide arrivals in 2022; var vs 2019



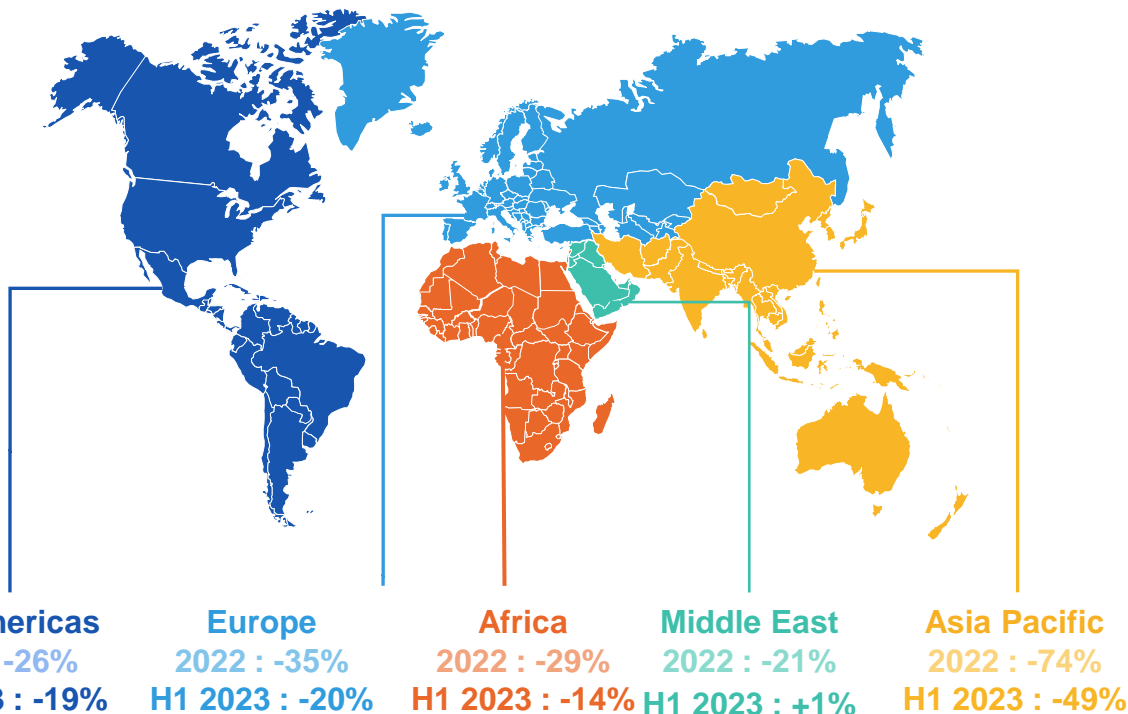
Total International Inbound

2022: **-44%**

Source: ForwardKeys Air Ticket Data.

# THE MIDDLE EAST ON COURSE TO BECOME FIRST TO GROW

International worldwide arrivals in 2022; var vs 2019



Total International Inbound

2022: **-44%**

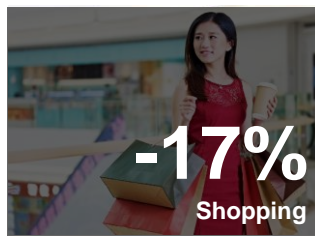
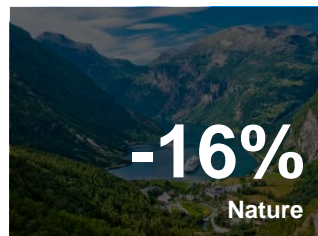
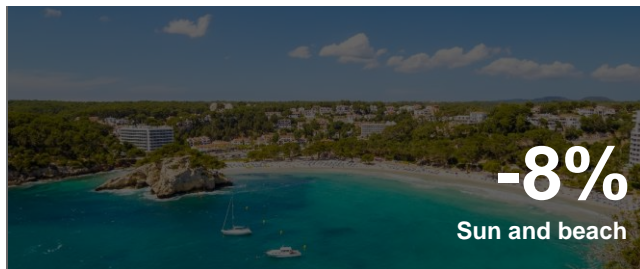
H1 2023: **-27%**



Source: ForwardKeys Air Ticket Data.

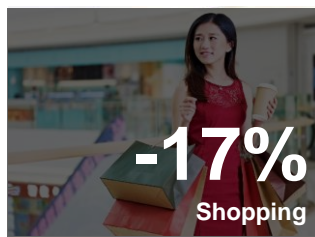
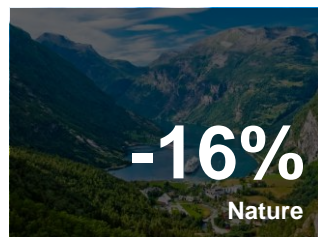
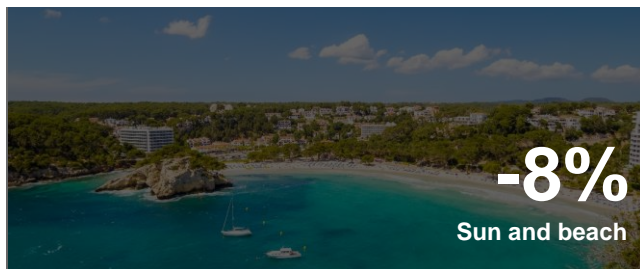
# SUN AND BEACH CONTINUE TO DOMINATE

International arrivals to Europe in H1 2023; var vs 2019



# SUN AND BEACH CONTINUE TO DOMINATE

International arrivals to Europe in H1 2023; var vs 2019



Most resilient destinations		Var vs 2019
1 <sup>o</sup>	<b>Albania</b>	<b>+10%</b>
2 <sup>o</sup>	Iceland	<b>+10%</b>
3 <sup>o</sup>	<b>Portugal</b>	<b>+5%</b>
4 <sup>o</sup>	<b>Greece</b>	<b>+3%</b>
5 <sup>o</sup>	Slovenia	<b>0%</b>
6 <sup>o</sup>	Spain	<b>-8%</b>
7 <sup>o</sup>	Turkey	<b>-9%</b>
8 <sup>o</sup>	Norway	<b>-9%</b>
9 <sup>o</sup>	Bosnia and Herzegovina	<b>-11%</b>
10 <sup>o</sup>	France	<b>-12%</b>



ForwardKeys

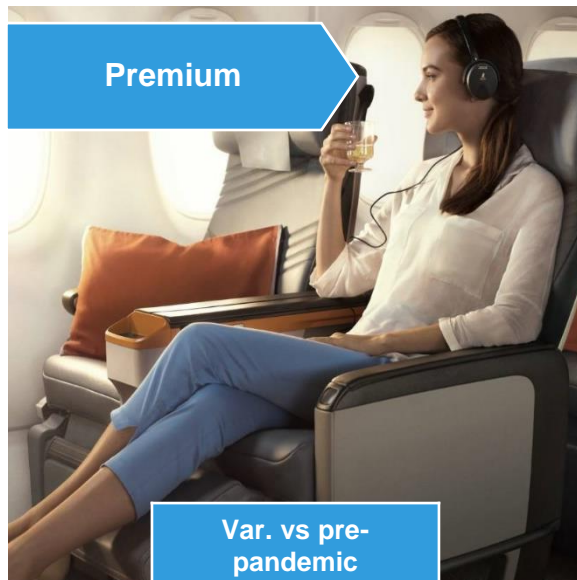
# New opportunities

Forwardkeys.com  
#ForwardKeys



# PREMIUM CLASS TRAVEL DRIVES PERFORMANCE

International arrivals to Europe in H1 2023; var vs 2019



Premium

Var. vs pre-pandemic

**+4%**



Economy

Var. vs pre-pandemic

**-19%**

## AMERICAN MARKETS ABOVE PRE-PANDEMIC LEVELS

Long-haul travel to Europe in H1 2023; var vs 2019

Most resilient destinations	Var vs 2019
<b>Mexico</b>	<b>+22%</b>
<b>U.S.A.</b>	<b>+8%</b>
<b>Colombia</b>	<b>+2%</b>
Canada	-1%
Kuwait	-2%
Saudi Arabia	-6%
U.A.E.	-8%
Australia	-13%
Brazil	-16%
Argentina	-17%
<b>TOTAL</b>	<b>-17%</b>

# AMERICAN MARKETS ABOVE PRE-PANDEMIC LEVELS

Long-haul travel to Europe in H1 2023; var vs 2019

Most resilient destinations	Var vs 2019
Mexico	+22%
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Saudi Arabia	-6%
U.A.E.	-8%
Australia	-13%
Brazil	-16%
Argentina	-17%
TOTAL	-17%



Premium Cabins

**+22%** vs 2019



Longer Stays

**+14%** vs 2019



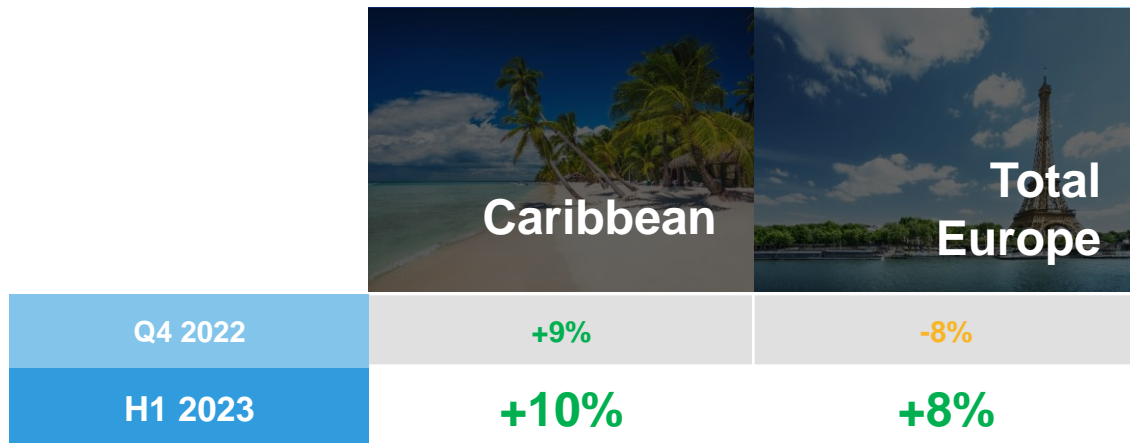
+3 pax. groups

**+25%** vs 2019

Source: ForwardKeys Actual Air Tickets

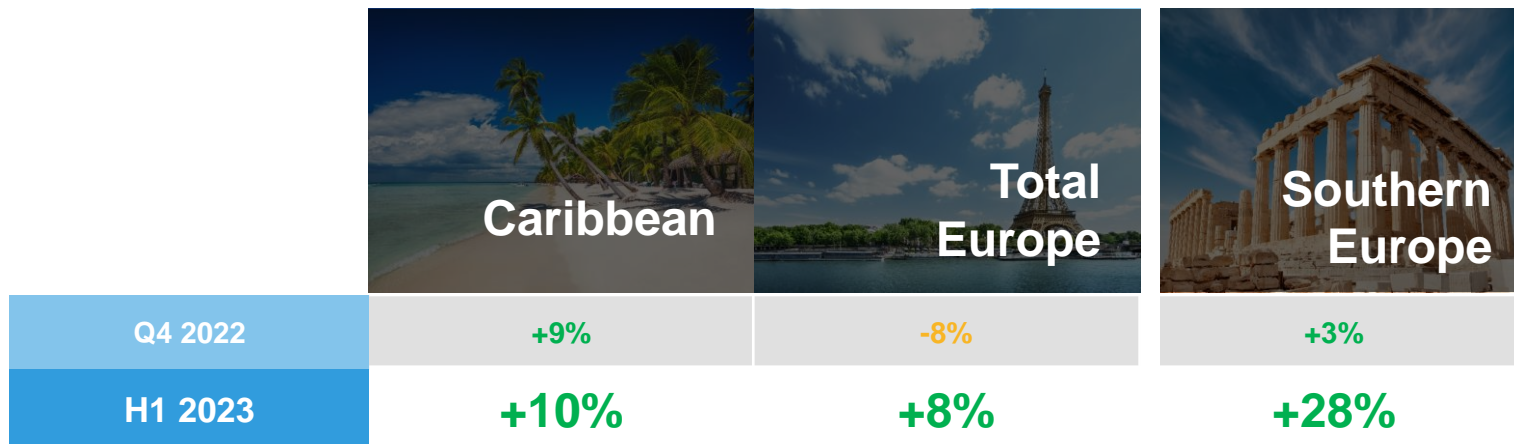
# EUROPEAN DESTINATIONS BEAT THE CARIBBEAN

Historical and forward-looking departures from the U.S.A. in Q4 2022 and H1 2023; vs 2019 levels










# EUROPEAN DESTINATIONS BEAT THE CARIBBEAN


Historical and forward-looking departures from the U.S.A. in Q4 2022 and H1 2023; vs 2019 levels



## MULTI-DESTINATION TRIPS ARE THE LEADING TREND

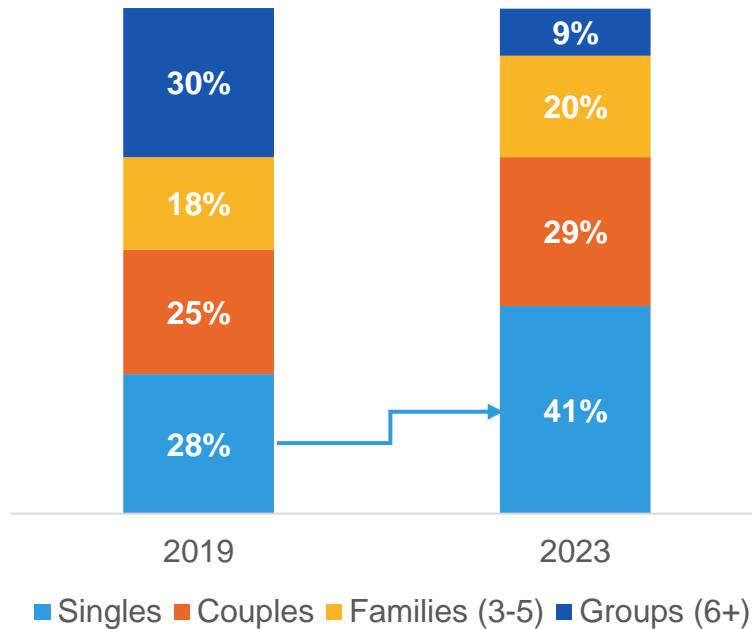
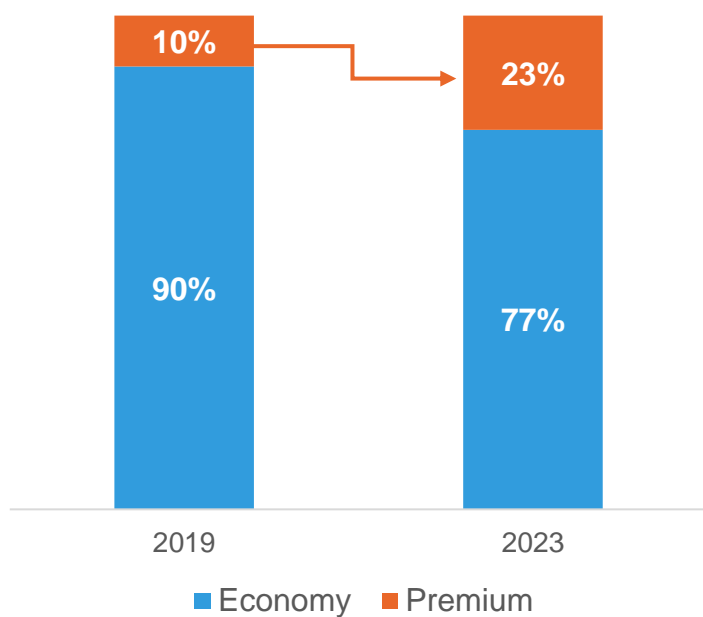
Forward-looking arrivals from the U.S.A. in H1 2023; vs 2019 levels

Top growing destination couples	Var vs 2019
  Italy	+118%
  	+125%
  Norway	+27%
<b>TOTAL</b>	<b>+12%</b>

 Source: ForwardKeys Actual Air Tickets.

# CHINESE TRAVELLER PROFILE HAS CHANGED

Bookings for return trips from China to Europe between March and May 2023; vs 2019



# Disrupting forces



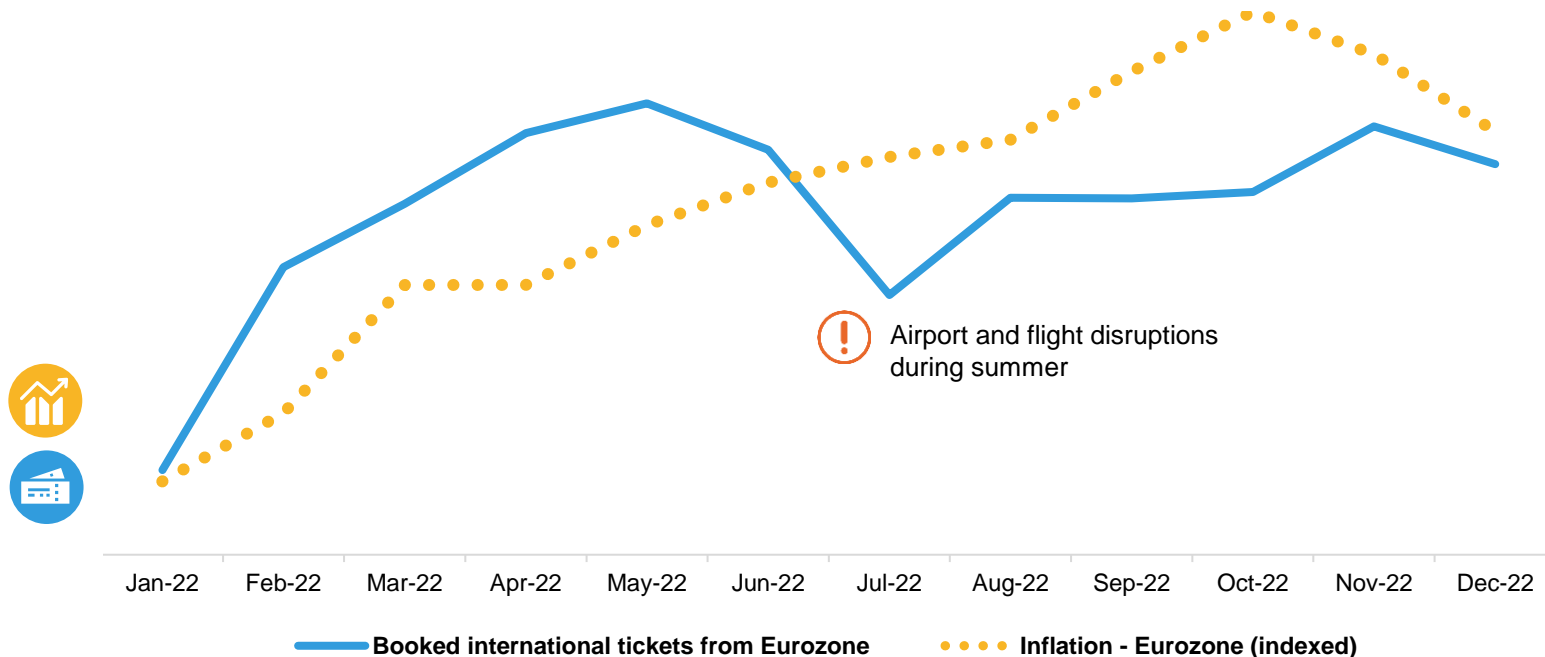
ForwardKeys

Forwardkeys.com  
#ForwardKeys



# INDUSTRY ISSUES IMPACT TRAVEL OVER ECONOMIC FACTORS

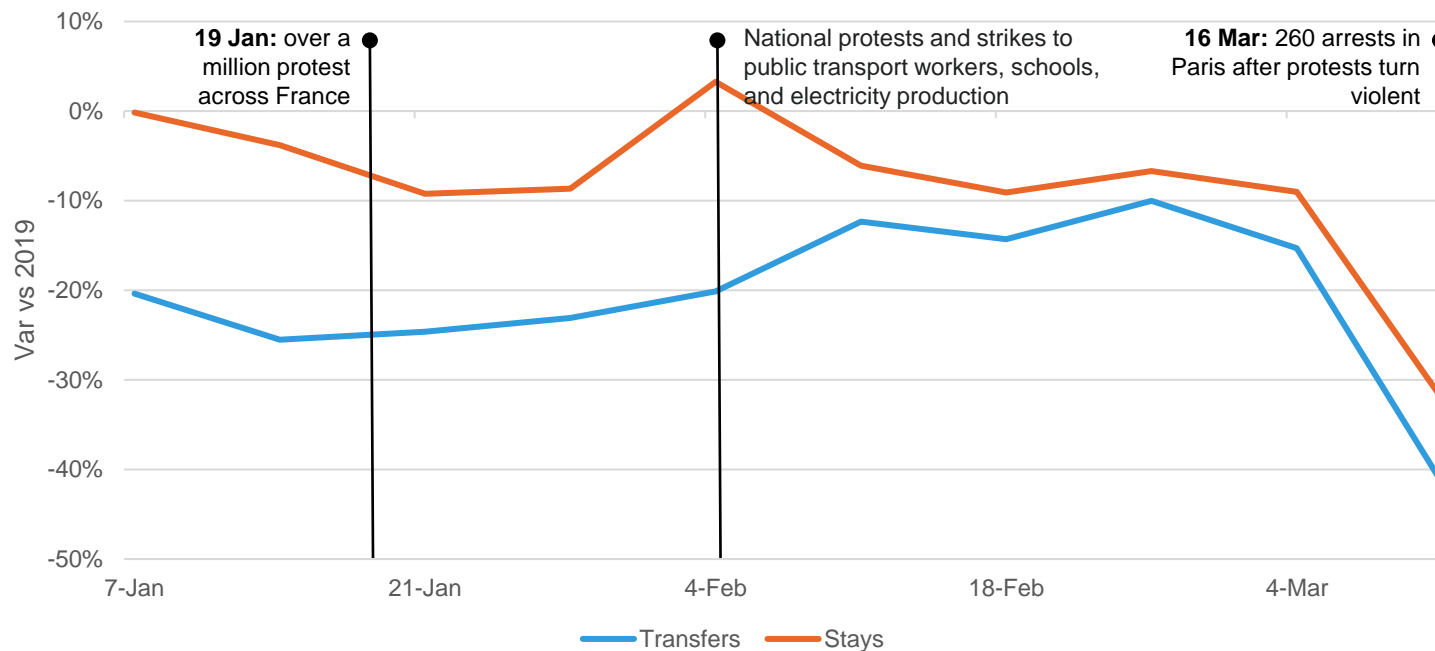
Booked tickets from Eurozone and inflation in 2022



Source: ForwardKeys Actual Air Tickets and Eurostat data.

# SOCIAL UNREST IN FRANCE WILL HAVE KNOCK-ON AFFECT FOR TRAVEL INDUSTRY

Tickets issued for future travel to and through Paris CDG airport; vs 2019



Source: ForwardKeys Actual Air Tickets.

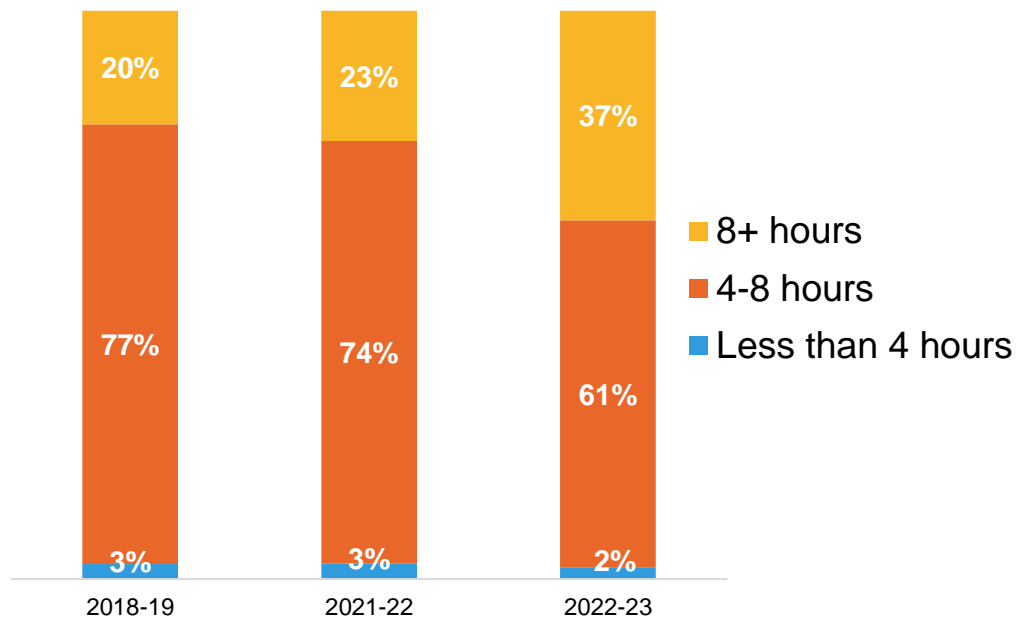
# WAR CAUSES LONGER AND MORE EXPENSIVE FLIGHTS

Travel between Asia Pacific and the EU



## +20%

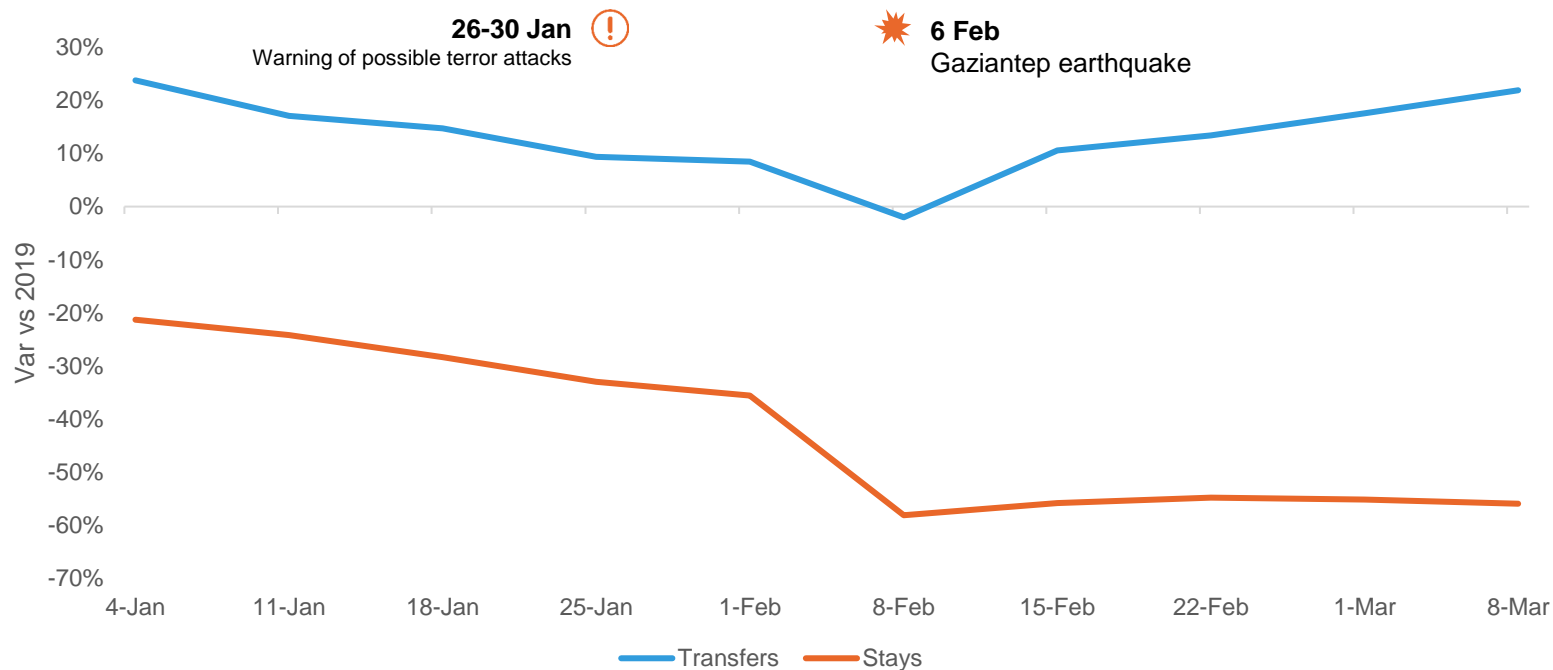
Fares increase  
in 2022 vs 2019



Source: ForwardKeys Seat Capacity Data and Fares data.

## CRISIS MANAGEMENT REMAINS KEY

Tickets issued for future travel to and through Istanbul; vs 2019



Source: ForwardKeys Actual Air Tickets.

# Easter Outlook

# The UK is the top performing intra-European origin market this easter

On-the-book intra-European arrivals between 31 March and 16 April 2023, as of 14 March; vs relative period in 2019



Most resilient origin markets	Var vs 2019
United Kingdom	+12%
Portugal	+1%
Ireland	+1%
Germany	-6%
Norway	-8%
Spain	-9%
Denmark	-13%
Belgium	-16%
Austria	-18%
Sweden	-22%
<b>TOTAL INTRA-EUROPEAN</b>	<b>-15%</b>

\*considering destinations with shares > 2%

\*\*excluding Ukraine, Russia and Belarus

Source: ForwardKeys Actual Air Tickets.

# Airlines boost supply to Southern European destinations this Easter

Scheduled Seat capacity for departures from the UK to Europe between 31 March and 16 April 2023, as of 13 March; vs relative period in 2019



Top performing European destinations	Var vs 2019
Turkey	+63%
Greece	+49%
Cyprus	+10%
Portugal	+10%
Romania	+5%
Ireland	0%
Poland	-1%
Norway	-1%
France	-5%
Switzerland	-5%
<b>TOTAL</b>	<b>-2%</b>

*\*considering destinations with shares > 1.5%*

*\*\*excluding Ukraine, Russia and Belarus*



Source: ForwardKeys Seat Capacity data.

# Summer Outlook













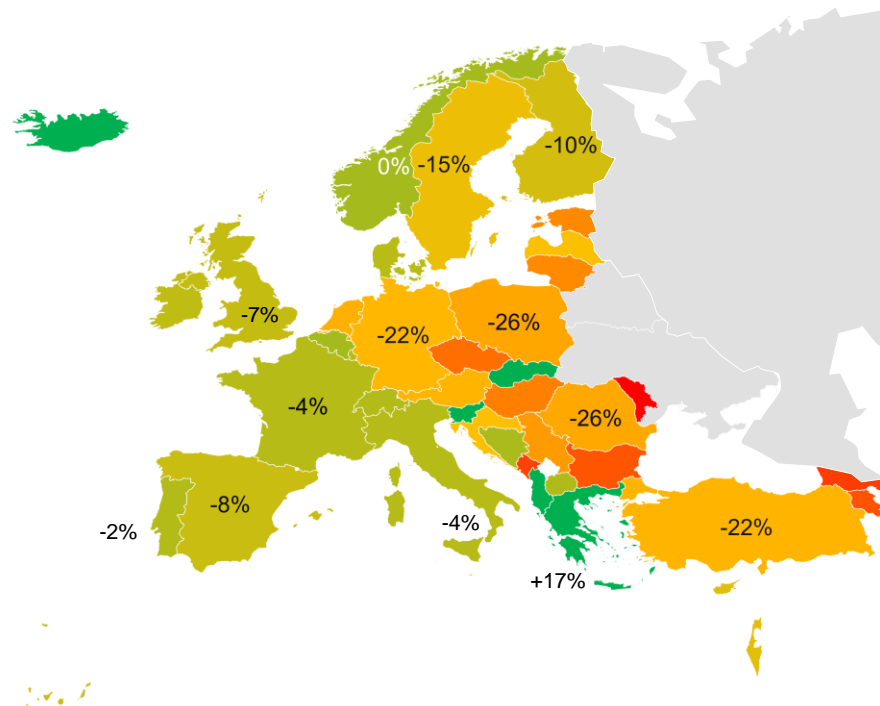
Forwardkeys.com  
#ForwardKeys



## BEACH AND NATURE TO DOMINATE (AGAIN)

International arrivals to Europe in Summer 2023; var vs 2019

Most resilient cities			Var vs 2019
1 <sup>o</sup>		Naples (IT)	+18%
2 <sup>o</sup>		Reykjavik (IS)	+18%
3 <sup>o</sup>		Athens (GR)	+16%
4 <sup>o</sup>		Milan (IT)	+9%
5 <sup>o</sup>		Palma Mallorca (ES)	+9%
6 <sup>o</sup>		Madrid (ES)	+3%
7 <sup>o</sup>		Rome (IT)	+2%
8 <sup>o</sup>		Nice (FR)	+2%
9 <sup>o</sup>		Paris (FR)	+1%
10 <sup>o</sup>		Edinburgh (GB)	0%



Source: ForwardKeys Actual Air Tickets

## BEACH AND NATURE TO DOMINATE (AGAIN)

International arrivals in Europe from the United Kingdom in Summer 2023: vs 2019



Most resilient country destinations		Var vs 2019
1 <sup>o</sup>	Greece	<b>+51%</b>
2 <sup>o</sup>	Turkey	<b>+35%</b>
3 <sup>o</sup>	Denmark	<b>+33%</b>
4 <sup>o</sup>	Sweden	<b>+23%</b>
5 <sup>o</sup>	Cyprus	<b>+19%</b>
<b>TOTAL</b>		<b>+8%</b>

Most resilient city destinations		Var vs 2019
1 <sup>o</sup>	Paris	<b>+43%</b>
2 <sup>o</sup>	Corfu	<b>+40%</b>
3 <sup>o</sup>	Ibiza	<b>+34%</b>
4 <sup>o</sup>	Palma Mallorca	<b>+31%</b>
5 <sup>o</sup>	Lisbon	<b>+31%</b>

# Take-Aways

1 Sun & Beach and Nature destinations will continue to outperform

# Take- Aways

2 Take advantage of the strength of the premium market

# Take- Aways

**3** Industry inability to accommodate demand to hamper recovery over economic uncertainties

# Take-Aways

4 Keep an eye on rising American markets while APAC is still on recovery-mode

Departures Salidas				Departures Salidas			
Flight Vuelo	Destination Destino	Gate Puerta	Boarding Time / Remarks Hora de Embarque / Observaciones	Flight Vuelo	Destination Destino	Gate Puerta	Boarding Time / Remarks Hora de Embarque / Observaciones
EZY 8536	LONDON GAT	7	11:45	IBL 583	BARCELONA		13:05
JAF 6104	BRUSELAS		12:00	BAE 515	BARCELONA		13:05
ST 8985	BREMEN	11	12:10	LS 522	NEWCASTLE		13:10
X3 2175	STUTTGART	17	12:10	BAE 515	BARCELONA		13:20
NT 207	G. CANARIA		12:15	IBE 3907	MADRID		13:20
X3 2177	KARLSRUHE	15	12:15	HQ 1533	BRUSELAS		13:25
AB 2139	DUSSELDORF		12:25	DE 1457	DUSSELDORF		13:25
FR 5469	MADRID		12:45	NT 417	TENERIFE N		13:35
ST 3701	DUSSELDORF		12:45	DE 1461	LEIPZIG		13:35
DE 1413	MUENCHEN	19	12:55	DE 1441	HAMBURG		13:35

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