

FORWARDKEYS'
DESTINATION INSIGHTS

Global Travel Trends 2023



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GLOBAL TRAVEL TRENDS 2023



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Foreword

In 2023, many destinations and travel businesses remained focused on recovery post-COVID-19. The speed of that recovery has varied by region, but by the end of 2024, it will be complete, even for those countries that lifted travel restrictions most recently.

This brings destinations back to the issues they were dealing with pre-pandemic. Where do they want to go with tourism? What type of tourism? For what purpose? But while the questions persist, the context has changed, shaped by geopolitical events, technological advances and rising concerns about sustainability.

“Growth at all costs” is no longer viable. Destinations and travel businesses need to focus on new models of tourism which are socially, economically and environmentally responsible. In this context, access to accurate, timely and granular travel data is invaluable to success.

As the industry leader in comprehensive global air travel intelligence, ForwardKeys is pleased to share this report, which analyses the evolving patterns of global tourism and changing traveller behaviours that are emerging through 2023. We hope it provides valuable insight into the most impactful trends affecting destinations, and the opportunities available.

As the travel industry prepares for a year marked by strong demand, the key question is how effective DMOs and industry professionals will be in attracting the appropriate traveller segments to meet their objectives for sustainable growth.

We wish you a successful 2024 – whatever shape that may take for your business or your destination.



Olivier Ponti
Vice President – Insights
ForwardKeys



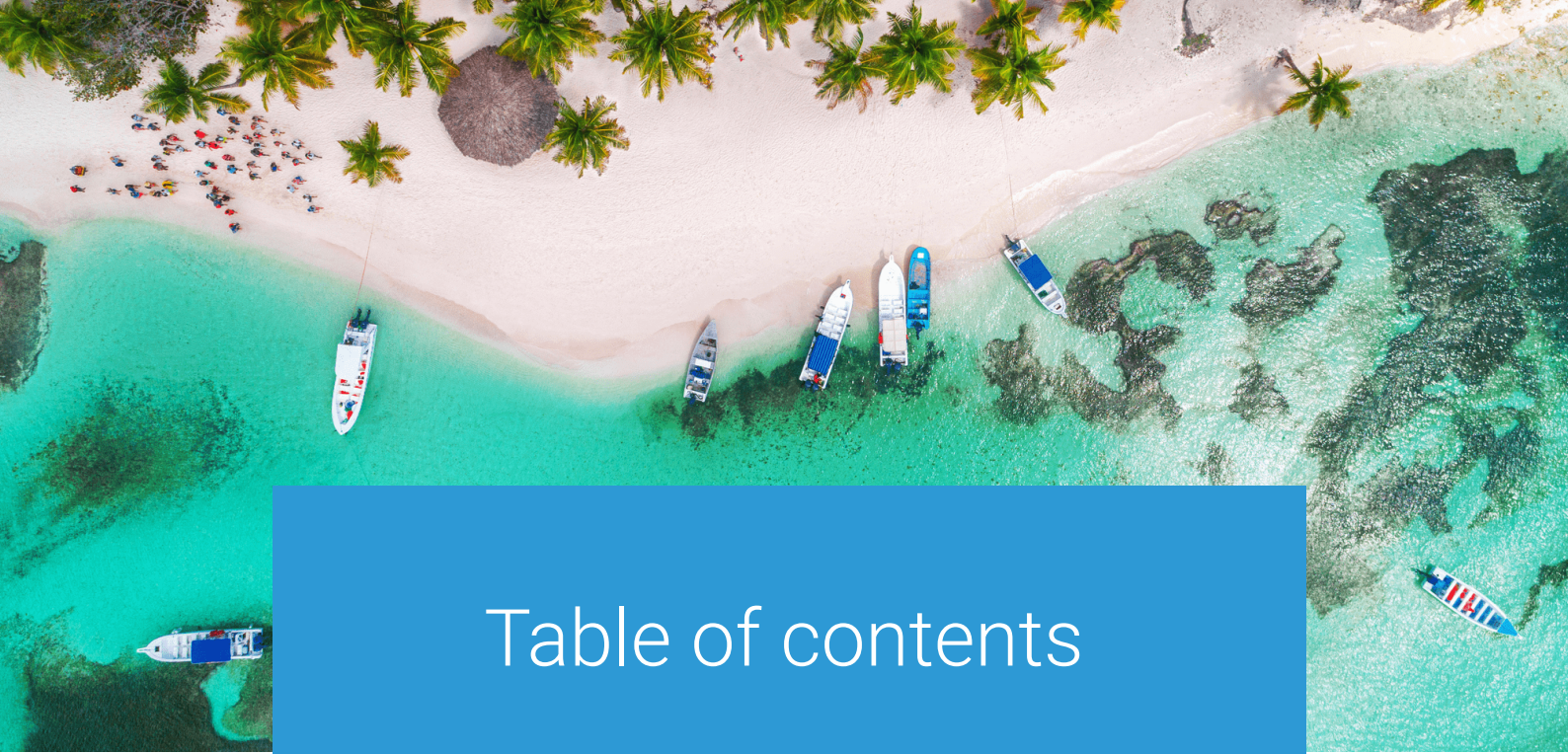


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Global destination ranking



Demand diversifies as global tourism recovers

Analysis of international tourist arrivals by destination country in 2023, including forward ticket data for Q4, reveals several notable trends when compared to the equivalent figures for 2019 and reflects the continued recovery of global tourism post-COVID-19.

In 2022, the list of most recovered top-tier destinations compared to 2019 was dominated by the Caribbean and Southern Europe, as pent-up travel demand for “sun and beach” destinations boosted international tourist arrivals. In the equivalent rankings for 2023, more diverse travel patterns emerge. While the Dominican Republic (1st), Mexico (3rd) and Greece (4th) maintain high positions, the mix is more varied overall, with Middle East and Africa (MEA) particularly well-represented among the top performers.

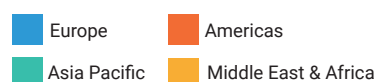
This year Colombia ranks second, surpassing 2019 levels for international tourist arrivals (+5%), returning to a growth phase and considerably outperforming peer destinations in South America. This is attributable to the country's improving reputation for tourist safety, paired with relatively high affordability and substantial connectivity improvements.

The recovery of international tourism to the UAE continues, with arrivals approaching pre-COVID-19 levels (-7%), fuelled in part by increased inbound travel from both the United States and Russia. The country's excellent air connectivity with China is also an important factor, enabling fast reactivation of Chinese inbound travel as restrictions in China have lifted.

Neighbouring Saudi Arabia exhibits even better recovery, returning to pre-COVID-19 levels for international tourist arrivals (=0%). A key contributing factor here is the 2023 Hajj pilgrimage, the first since the outbreak of the COVID-19 pandemic where an attendance cap has not been imposed by the Saudi government, as well as religious tourism related to Eid celebrations. The effects of Saudi Arabia's efforts to increase air connectivity, and its \$800 billion investment in tourism marketing as part of the country's Vision 2030 economic diversification strategy are also evident in this recovery.

Recovery of top-tier destinations* by international tourist arrivals, 2023 vs 2019

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



Source: ForwardKeys Actual Air Tickets

* Including destinations with >0.65% share of worldwide international arrivals.

Caribbean destinations in post-recovery growth

Best performing destinations*, 2023 vs 2019

Ranking 2023	Destination*	2023 vs 2019
1	Dominican Republic	+14%
2	Costa Rica	+11%
3	Aruba	+11%
4	Jamaica	+9%
5	Puerto Rico	+9%
6	Colombia	+5%
7	Mexico	+5%
8	Bahamas	+3%
9	Greece	+3%
10	Saudi Arabia	=0%

Source: ForwardKeys Actual Air Tickets

* Including destinations with >0.3% share of worldwide international arrivals.

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

The destinations that have seen the most growth in international tourist arrivals when compared to 2019 are overwhelmingly “sun and beach” focused locations.

In the Caribbean Sea area, a post-COVID-19 success story has emerged with the Dominican Republic, Costa Rica, Aruba, Jamaica, Puerto Rico, Colombia, Mexico and the Bahamas as the top eight global performers. The primary origin markets fuelling this continued growth are the United States, as well as long-haul markets, reflecting demand not only for island destinations, but also neighbouring countries offering diverse options for nature and cultural tourism.

Greece exhibits the greatest growth among destinations in Europe over 2019 levels (+3%), placing it just inside the top ten (9th), while Saudi Arabia’s (10th) return to pre-COVID-19 international tourist figures (=0%) reflects both increased investment and its unique place as a site of Islamic pilgrimage.

Asia’s race for recovery hits final straight

APAC destinations saw impressive growth over 2022 as travel restrictions were left behind, but remain behind pre-pandemic volumes, with the top performers Bangladesh (-1%), Pakistan (-5%) and India (-11%) benefitting from pent-up VFR travel, and the Maldives (-12%), Indonesia (-34%), and Japan (-34%) performing best in terms of leisure travel.

Post-COVID-19 challenges in the region included connectivity bottlenecks, high fares and a slow reactivation of major regional outbound markets, like China. This has substantially reconfigured the ranking of top regional destinations compared to 2019.

Japan has become the most visited regional destination, up from second in 2019, while China dropped from first to fourth place. In terms of the share of total APAC international arrivals, India made significant gains (4 percentage points) followed by the Philippines (1 percentage point) and Vietnam (0.9 percentage points). Overall, the outlook is positive, with the recovery of all APAC markets expected to continue to completion through 2024.

Top APAC destinations* by international arrivals; best performing in 2023 vs 2019

Diff. with regional ranking in 2019	Destination	Share difference*, 2023 vs 2019
↑ 1	Japan	+1.8 p.p.
↑ 2	India	+4.0 p.p.
= 0	Thailand	-0.2 p.p.
↓ 3	China	-7.2 p.p.
= 0	South Korea	0.0 p.p.
= 0	Vietnam	+0.9 p.p.
↑ 4	Philippines	+1.0 p.p.
= 0	Singapore	-0.3 p.p.
↑ 1	Australia	-0.4 p.p.
↑ 2	Indonesia	+0.4 p.p.

Source: ForwardKeys Actual Air Tickets

* Regional share difference is expressed in percentage points (p.p.).



Know exactly who's visiting, when and for how long

DMOs have evolved – and destination marketing is now only a part of the equation. Balancing the needs of tourists versus locals requires a detailed understanding of the economic, social and environmental impact of inbound travel.

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Key trends: Outbound travel is changing in 2023

Analysis of detailed ticketing data for 2023 reveals a number of insights into changing outbound travel preferences and behaviours. These trends underline the importance of access to accurate, granular data in empowering tourism operators to micro-segment travellers and identify emerging opportunities in niche travel segments.



Destination preferences



Urban tourism is on the rise

For the last two years, travellers have shown a clear preference for “sun and beach” destinations, as pent-up demand was realised post-pandemic. In 2023 the picture has changed. Tourism to urban destinations is on the rise – with growth of 52% over 2022 levels, significantly outpacing “sun and beach” destinations which have seen 26% growth over the same period.



Connectivity key to South America's recovery

Recovery in South America has progressed since 2022 but lags behind 2019 figures (-19%), with high airfares and limited connectivity both limiting reactivation. Seat capacity on direct international flights remains lower than in 2019 for key regional destinations such as Brazil (-12%), Argentina (-17%), Chile (-13%) and Peru (-22%). Colombia's success – among the top global performers in 2023 – underlines the importance of connectivity. Ambitious expansion has seen seat capacity grow well beyond 2019 levels (+31%), boosting connectivity with long-haul and regional/US markets. With Colombia now competing with Caribbean destinations for leisure travel, regional gateways providing inbound connectivity such as Panama, São Paulo and Bogota are also seeing an uplift.



Safari tourism creates growth in Africa

Half of the top 30 destinations in Africa are close to or above 2019 levels – with many Sub-Saharan countries such as Tanzania (+13%), Cape Verde (+3%), Rwanda (+1%), and Namibia (+0%) represented. Strong demand from markets including the US, Canada and the European Union demonstrates the appeal of the region and the attractiveness of safari tourism destinations. The development of long-haul connectivity has been fundamental to Africa's success. Seat capacity on non-stop flights has risen compared to 2019, both from the EU and from the Americas.



Climate change matters long-term

While the summer of 2023 saw extreme temperatures, wildfires and floods in the Northern Hemisphere, the effect of climate-change-driven events on travel has so far been limited. Following events like the Rhodes wildfires, ticketing patterns returned to normal levels within a month. However, long term, climate change is expected to reshape travel preferences significantly as predicted temperature rises reduce summer demand in hotter destinations and increase the attractiveness of traditionally cooler regions.



Tourist profile



Europe is back in business

While remote and hybrid working has reduced demand for business travel, the MICE industry remains a strong driver for this segment. However, compared with 2019, indexed performance figures show business travel recovery has trailed that of leisure travel – except in Europe, where it is recovering at a similar pace (-21% business vs -22% leisure). In APAC and MEA leisure travel recovery is slightly ahead, with a difference of a few percentage points, while in the Americas the gap between business (-24%) and leisure travel (-2%) remains significant.



Travellers prefer to stick together

Shared experiences are important to many travellers, as illustrated by the resilience of family group travel – three to five passengers travelling together. Benchmarked against 2019, this segment has recovered the fastest across all regions, especially in the Americas where it has already surpassed 2019 levels. Although slower to recover, couple travel is the second most resilient segment in every region, and only slightly behind family group travel in APAC and the Americas.



Luxury beats economy worldwide

The recovery of demand for luxury experiences has outpaced regular travel options in APAC – which can be partly attributed to the “revenge travel” effect. But in the Americas and MEA, where this phase has passed, the recovery of demand for premium cabin classes continues to perform better than for economy seats – an indication that even during widespread cost-of-living concerns, high-income consumers remain resilient to pricing pressure.



Travel and booking behaviour



Flexible work drives off-season travel

Traditionally, aside from climate, travel seasonality is most closely linked to work or school calendars, leading to predictable peaks and troughs. However, with the increased popularity of remote or hybrid work, certain demographics have the freedom to travel year-round, enabling them to take advantage of lower off-season prices and less crowded destinations. In 2023, the segment of US couples, for instance, shows better performance in January to May and September to December than in the summer season itself.



Lead times back to pre-pandemic length

Now that booking behaviour is no longer conditioned by travel restrictions, and consumer confidence is restored, booking patterns reflect pre-pandemic behaviour in Europe and MEA, where lead times for 2023 are on par with 2019. In APAC and the Americas, this recovery has been muted slightly – mostly by pricing pressure – with average lead times in each region remaining around 5 days longer than pre-COVID-19 for the time being, although the overall trend is towards parity.



Travellers opt for fewer, longer trips

A combination of higher travel costs, increased awareness of the impact of air travel, and domestic travel trends which emerged during the pandemic are shifting traveller preference away from multiple short getaways and towards longer, more meaningful travel experiences. Compared to 2019, short trips (1-3 nights) lost 4 percentage points globally in comparison to medium (4-13 nights) and long trips (14+ nights) – encouraging news for destinations looking to attract more “impactful” visitors and promote less carbon-intensive travel.



The future is digital for travel agencies

During the COVID-19 pandemic, there was a significant shift towards direct booking with airlines. In 2023, while direct bookings remain popular, the pendulum is starting to swing back, with growth in the share of bookings made via travel agencies over 2022. While this is encouraging, at this stage it's not yet clear to what extent travel agencies will continue to recover market share. What is clear is that online agencies are recovering better than their high-street equivalents – reflecting broader commercial trends.





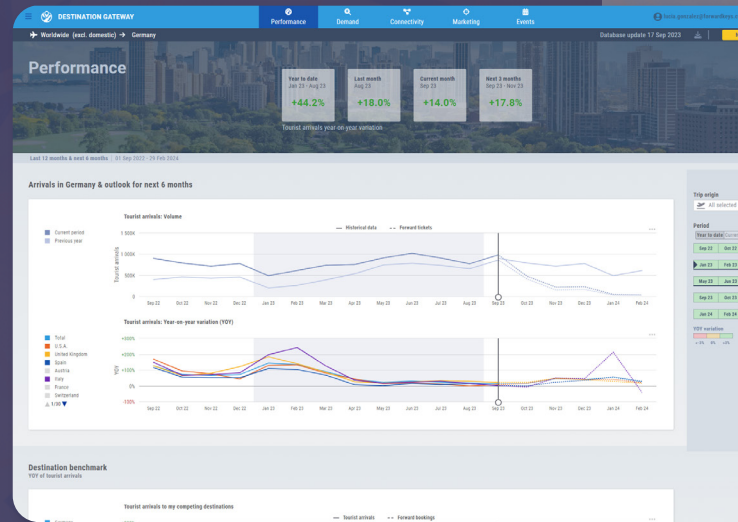
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Expert's
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Reactivation of outbound demand varies regionally



By **Juan A. Gómez**, Head of Market Intelligence at ForwardKeys

Analysis of worldwide international departures in 2023 grouped according to source markets reveals that reactivation of demand varies significantly. With the region itself having recovered relatively quickly post-COVID-19, North America's outbound markets, particularly the US, have been the main driver of recovery elsewhere. The strong dollar and limited inflationary pressure have increased demand for travel into Europe and APAC. Caribbean and Central American destinations, much in demand through 2022, remained popular but faced increased competition.

In Canada, intraregional travel represents a large share of outbound traffic, but performance is not as strong as for some international markets. In particular, demand towards Southern European and South Asian destinations exceeds pre-COVID-19 levels.



North America's outbound markets, particularly the US, have been the main driver of recovery elsewhere. The strong dollar and limited inflationary pressure have increased demand for travel into Europe and APAC.



Latin America's impressive recovery (-18% vs 2019) places it among the most dynamic regions. Mexico (+3%) and Colombia (-11%) emerge as regional feeder markets and are the top-performing destinations – emphasising the role of connectivity in driving success in the region. Key drivers include intraregional travel within the Americas (-20%) and outbound travel to Europe (-11%), increasing the relevance of regional hubs such as São Paulo and Panama City which have gained market share.

Economic issues are a defining factor in European outbound travel, with strong inflation depressing growth overall. One visible effect is the comparative demand for economy cabin seats – in 2023 this cabin class is outperforming premium options to a greater extent than in 2022. However, certain markets have managed to recover above the European average, with Ireland (-5%),

International departures by origin market, 2023 vs 2019

Origin market	2023 vs 2019
Americas	-7%
US and Canada	-3%
Latin America	-18%
Europe	-21%
European Union	-17%
United Kingdom	-21%
Asia Pacific	-48%
China	-77%
India	-29%
Middle East & Africa	-22%
GCC	-22%

Source: ForwardKeys Actual Air Tickets

Spain (-7%), and Norway (-9%) approaching pre-COVID-19 figures for outbound travel.

In MEA, Egypt stands out as the only market to recover to 2019 levels, in fact exhibiting modest growth at 4% over pre-COVID-19 levels. The strongest demand for outbound travel from MEA markets is towards the Middle East – Saudi Arabia in particular – originating mainly in regional Middle Eastern markets but also including African outbound travel. The defining factor here is travel related to religious events or observance, with the biggest driver being the Hajj pilgrimage to Mecca in Saudi Arabia in late June, as well as “visiting friends and relatives” (VFR) travel related to Eid al-Fitr celebrations in April.

Intraregional travel leads China outbound recovery



By **Nancy Dai**, Insights Expert at ForwardKeys

Asian outbound markets are now in a similar position to that of Europe and North America in 2022 – having recently reopened with the full removal of travel restrictions, but still in the process of re-establishing connectivity on some routes. Unlike in 2022 however, with the whole world open for business, the potential for accelerated recovery is greater. This is particularly true of China, where the restoration of connectivity has been key to the reactivation of outbound travel.



With the whole world open for business, the potential for accelerated recovery is greater. This is particularly true of China, where the restoration of connectivity has been key ”

Analysis of two key periods for Chinese travel in 2023 reveals the importance of this factor. The May Day holiday in China, which fell shortly after total reopening, saw the majority of Chinese travellers opting for domestic trips, as options for international travel remained limited. Only regional destinations including Hong Kong, Macao, Singapore and Malaysia which had managed to reopen routes quickly, received an appreciable share of Chinese tourists.

By Golden Week, which this year coincided with the mid-Autumn festival (from 29th September to 6th October), restored connectivity to long-haul destinations popular with Chinese travellers – such as the UAE and the UK – resulting in greater international travel demand, saw numbers returning to pre-COVID-19 levels and persisting through the second half of the year.

Elsewhere in APAC, compared to pre-COVID-19 figures for outbound travel, Australian (-27%) and Indian (-29%) markets exhibited the strongest recovery, with South Korea (-33%) following closely behind. South Korean travellers remain strongly focused on regional destinations, particularly Japan, which saw an increase in tourist arrivals from South Korea of 22% over 2019 numbers. With recovery nearing completion, India is well positioned for further outbound growth, with a government-sponsored air connectivity programme investing US\$ 12B in airport construction and modernisation through 2025.

Key factors for full reactivation in APAC include industry preparedness and consumer confidence, as well as changing consumer habits developed over a long period of highly restricted travel, with a switch in focus towards domestic travel and non-travel leisure activities. With the full reopening of international travel still a relatively recent event in many countries in the region, it remains to be seen how permanent these behavioural changes may prove to be.



Strategic data: a vital tool for DMOs pursuing sustainable tourism



By **Luis Millan**, Head of Research at ForwardKeys

The role of destination marketing organisations has evolved, and sustainability now forms a core part of their strategy. As DMOs widen their remit to address the three dimensions of sustainability: social, environmental and economic, the need for a more sophisticated approach to demonstrating their value and impact becomes clear.

Tourism is an invaluable tool for progress, providing an opportunity to exchange cultures and ideas and promote understanding between countries. However, to ensure buy-in from residents, DMOs have an important role to play. This includes targeting the markets and segments most aligned with strategic destination goals – as well as engaging with policymakers on regulations, taxes and legacy planning to combat potential negative effects of unbalanced tourism.

The environmental impact of tourism also draws both global and local criticism, but important work is being undertaken by DMOs to address this. Air travel is the

dominant contributor to travel-related CO2 footprint. Detailed analysis is therefore important – allowing destinations to identify the most carbon-intensive traveller profiles and markets and optimise the mix of transport modes and visitor types to mitigate its impact. International initiatives such as the Glasgow declaration, and liaison with local stakeholders to promote “green” best practices and certifications further demonstrate DMOs’ commitment.

Economically, tourism is an important driver of wealth transfer into developing economies and small island states. While high-income countries account for 79% of global departures, a third (35%) of that travel is into low and middle-income countries. This in turn creates much-needed employment opportunities – in 2022 alone 22 million new jobs attributable to tourism were created, according to the World Travel & Tourism Council. DMOs are vital to ensuring balance in this context, managing tourism seasonality and refining distribution strategies to ensure that the economic benefits of tourism are sustainable.

International travel by countries’ income level classification*, 2023



Source: ForwardKeys Actual Air Tickets

* Country grouping by income level is based on the World Bank classification

While the work done by DMOs and related organisations to overcome these issues is praiseworthy, they continue to face two major challenges – demonstrating the tangible value of their current efforts, and accurately identifying the most impactful areas to address moving forward. Many DMOs have not yet managed to fully leverage the power of data to address these challenges – to transition from mere data reporting to strategic data application for informed analysis and decision-making.



The ability to access the right data at the right moment, especially through natural language interfaces, empowers DMOs to greatly improve data-driven decision-making.



Fortunately, the availability of highly accurate, granular and near real-time travel data, coupled with rapidly advancing technologies like artificial intelligence, can ease this transition. The ability to access the right data at the right moment, especially through natural language interfaces, empowers DMOs to greatly improve data-driven decision-making.

DMOs increasingly view themselves as custodians of destinations, and to excel in this role, harnessing and interpreting data is crucial. This not only aids their primary functions but also provides an opportunity to reposition themselves as centres of expertise on travellers. Progressing from marketing and management to strategic leadership in this way is a vital step if DMOs are to ensure their continued influence and relevance in a rapidly changing tourism landscape.



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Methodology

Insights in this report were compiled from **ForwardKeys Actual Air Tickets**, the most comprehensive source of tickets booked globally. All tickets issued until 26 September 2023 have been used in the analyses of travel trends during 2023 benchmarked against 2022 and 2019. The results refer to international tourist arrivals, defined as travellers staying at least one night in the destination as part of a return trip. The information on destination preferences (Sun & Beach, Urban) is based on the indexed performance of top city destinations representing each category.

Information on air connectivity is compiled from **ForwardKeys Seat Capacity**, which includes information on scheduled direct commercial flights and their seat capacity.

The geographic distribution of countries and continents is as defined by the UNWTO, unless specified otherwise.

Abbreviations used:

APAC: Asia Pacific, referring to countries in Asia and Oceania subregions

DMO: Destination Management Organization

EU: European Union

MEA: Middle East and Africa

GCC: Gulf Cooperation Council

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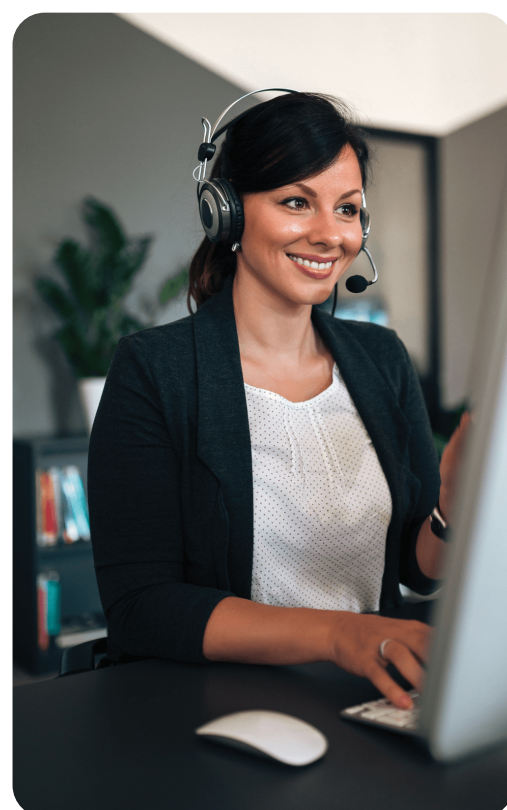
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About ForwardKeys

ForwardKeys is a travel intelligence specialist – founded on the simple idea that businesses dependent on international travel, such as travel retailers, brands, and media agencies can make better strategic decisions if they know who is travelling where, when, and for how long –down to the terminal level.

The ForwardKeys data ecosystem provides exclusive insights into air travel through a variety of data partners and industry entities covering direct airline tickets and TA bookings, flight searches, seat capacity, events, air traffic statistics and more.

This data is processed and enriched using a combination of expert review and manipulation, algorithmic processing and AI tools to produce discrete data products which offer unparalleled insight into the profile, behaviour and impact of past, present and future travellers.

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Data appendix



Top country destinations

Only destination countries with more than 0.3% of global international arrivals are listed. Aggregated results for the continents include all the countries. Tourist arrivals' results are based on ForwardKeys' Actual Air Tickets as of September 26, 2023 (combining historic results and tickets booked until year-end). Only travelers with a return trip and a stay of at least one night at the destination are considered.

International tourist arrivals in top regional destinations, 2023 vs 2019

Destination	2023 vs 2019	Destination	2023 vs 2019	Destination	2023 vs 2019
Americas	-16%	Europe	-22%	Asia Pacific	-42%
Argentina	-3%	Austria	-31%	Australia	-47%
Aruba	+11%	Belgium	-21%	Bangladesh	-1%
Bahamas	+3%	Croatia	-29%	China	-70%
Brazil	-21%	Czech Republic	-47%	Hong Kong	-54%
Canada	-18%	Denmark	-15%	India	-11%
Chile	-40%	Finland	-25%	Indonesia	-34%
Colombia	+5%	France	-16%	Japan	-34%
Costa Rica	+11%	Germany	-32%	Malaysia	-48%
Dominican Republic	+14%	Greece	+3%	Maldives	-12%
Jamaica	+9%	Hungary	-42%	New Zealand	-42%
Mexico	+5%	Iceland	-3%	Pakistan	-5%
Panama	-21%	Ireland	-15%	Philippines	-29%
Peru	-45%	Italy	-19%	Singapore	-45%
Puerto Rico	+9%	Netherlands	-26%	South Korea	-42%
U.S.A.	-27%	Norway	-11%	Sri Lanka	-30%
Worldwide international arrivals	-25%	Poland	-28%	Taiwan	-55%
		Portugal	-1%	Thailand	-43%
Destination	2023 vs 2019	Spain	-11%	Vietnam	-32%
Africa and Middle East	-12%	Sweden	-24%	Worldwide international arrivals	-25%
Egypt	-10%	Switzerland	-18%		
Jordan	-6%	Turkiye	-9%		
Kenya	-7%	United Kingdom	-19%		
Lebanon	-21%	Worldwide international arrivals	-25%		
Morocco	-16%				
Saudi Arabia	0%				
South Africa	-35%				
United Arab Emirates	-7%				
Worldwide international arrivals	-25%				

Source: ForwardKeys Actual Air Tickets

Top city destinations

International tourist arrivals in the top 10 destination cities on each continent. Tourist arrivals' results are based on ForwardKeys' Actual Air Tickets as of September 26, 2023 (combining historic results and tickets booked until year-end). Only travelers with a return trip and a stay of at least one night at the destination are considered.

International tourist arrivals in top regional destinations, 2023 vs 2019

Destination	2023 vs 2019
Americas	-16%
Buenos Aires (AR)	-1%
Cancun (MX)	+11%
Los Angeles (US)	-39%
Mexico City (MX)	-13%
Miami (US)	-25%
New York (US)	-24%
Orlando (US)	-22%
Punta Cana (DO)	+22%
San Francisco (US)	-35%
Toronto (CA)	-20%

Destination	2023 vs 2019
Europe	-22%
Amsterdam (NL)	-26%
Athens (GR)	0%
Barcelona (ES)	-23%
Istanbul (TR)	-10%
Lisbon (PT)	-2%
London (GB)	-18%
Madrid (ES)	-3%
Milan (IT)	-14%
Paris (FR)	-15%
Rome (IT)	-19%

Destination	2023 vs 2019
Asia Pacific	-42%
Bangkok (TH)	-43%
Delhi (IN)	0%
Ho Chi Minh City (VN)	-31%
Hong Kong (HK)	-54%
Manila (PH)	-30%
Osaka (JP)	-40%
Seoul (KR)	-39%
Singapore (SG)	-45%
Taipei (TW)	-52%
Tokyo (JP)	-25%

Destination	2023 vs 2019
Middle East and Africa	-12%
Abu Dhabi (AE)	-27%
Amman (JO)	-7%
Beirut (LB)	-21%
Cairo (EG)	-15%
Cape Town (ZA)	-24%
Dubai (AE)	-5%
Jeddah (SA)	+2%
Johannesburg (ZA)	-38%
Madinah (SA)	-7%
Nairobi (KE)	-8%

Source: ForwardKeys Actual Air Tickets



PREDICTING TRAVELLERS' IMPACT

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