

IATA

AVIATION

DAY

GUATEMALA

Guatemala City - November 18, 2024



Bienvenidos a Guatemala



Peter Cerdá

Vicepresidente Regional
Las Américas
IATA

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GUATEMALA

BIENVENIDOS

Guatemala City - November 18, 2024



BENEFICIOS DE LA AVIACIÓN Y EL TURISMO EN GUATEMALA



CONTRIBUCIÓN DEL TURISMO AL PIB



CONTRIBUCIÓN DEL TURISMO AL EMPLEO



Fuente: IATA utilizando información del WTTC. Empleos en millones y Contribución al PIB en billones. *2024 Estimado.

WORLD ECONOMIC FORUM

ÍNDICE DE DESARROLLO DE VIAJES Y TURISMO:

GUATEMALA:

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ECONOMÍAS EVALUADAS

Rank	Economy	Score ²	Change since 2019 ³		Diff. from TTDI Avg. (%)
			Rank	Score	
1	United States	5.24	0	-0.5%	32.3%
2	Spain	5.18	0	0.9%	30.6%
3	Japan	5.09	0	-0.3%	28.5%
4	France	5.07	2	0.8%	28.0%
5	Australia	5.00	2	0.8%	26.0%
6	Germany	5.00	-1	-0.8%	26.0%
7	United Kingdom	4.96	-3	-2.4%	25.2%
8	China	4.94	1	1.0%	24.6%
9	Italy	4.90	3	2.1%	23.5%
10	Switzerland	4.81	-2	-2.3%	21.3%
11	Canada	4.81	-1	-1.1%	21.2%
12	Portugal	4.78	1	-0.1%	20.6%
13	Singapore	4.76	-2	-1.7%	19.9%
14	Korea, Rep.	4.74	0	1.1%	19.6%
15	Austria	4.65	0	-0.5%	17.4%
16	Netherlands	4.64	1	0.1%	17.0%
17	Denmark	4.63	-1	-0.9%	16.8%
18	United Arab Emirates	4.62	7	4.4%	16.5%
19	Sweden	4.57	0	0.7%	15.4%
20	Finland	4.52	-2	-1.7%	14.0%
21	Greece	4.52	5	2.6%	13.9%
22	Indonesia	4.46	14	4.5%	12.4%
23	Belgium	4.45	0	-0.5%	12.2%
24	Ireland	4.44	-3	-1.5%	12.0%
25	New Zealand	4.41	-5	-2.6%	11.3%
26	Brazil	4.41	8	3.3%	11.2%
27	Poland	4.40	3	2.0%	11.1%
28	Luxembourg	4.40	-4	-0.9%	10.9%
29	Türkiye	4.39	8	3.1%	10.6%
30	Cyprus	4.37	-3	-0.4%	10.4%
31	Chile	4.33	4	1.4%	9.2%
32	Iceland	4.32	-10	-3.4%	9.0%
33	Czech Republic	4.31	-2	0.3%	8.8%
34	Malta	4.30	4	1.1%	8.4%
35	Malaysia	4.28	-7	-2.2%	7.9%
36	Estonia	4.28	4	0.7%	7.8%
37	Hungary	4.27	5	1.7%	7.7%
38	Mexico	4.26	-6	-0.6%	7.4%
39	India	4.25	-10	-2.1%	7.1%
40	Bulgaria	4.25	-1	0.0%	7.1%

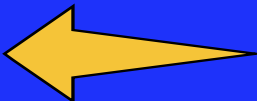
Rank	Economy	Score ²	Change since 2019 ³		Diff. from TTDI Avg. (%)
			Rank	Score	
41	Saudi Arabia	4.23	9	5.7%	6.7%
42	Slovenia	4.22	-9	-1.2%	6.4%
43	Romania	4.19	2	0.8%	5.7%
44	Lithuania	4.17	4	1.4%	5.2%
45	Georgia	4.14	4	1.0%	4.4%
46	Croatia	4.13	-2	-0.7%	4.3%
47	Thailand	4.12	-6	-2.5%	3.9%
48	Israel	4.10	-5	-1.6%	3.4%
49	Argentina	4.10	-2	-0.6%	3.4%
50	Colombia	4.08	6	2.3%	3.0%
51	Costa Rica	4.08	4	2.2%	2.9%
52	Kazakhstan	4.07	6	3.7%	2.6%
53	Qatar	4.02	-7	-3.3%	1.3%
54	Slovak Republic	4.00	-2	-0.2%	0.8%
55	South Africa	3.99	7	3.4%	0.7%
56	Azerbaijan	3.98	-5	-0.6%	0.3%
57	Mauritius	3.98	-4	-0.7%	0.3%
58	Bahrain	3.96	3	2.1%	-0.1%
59	Viet Nam	3.96	4	3.2%	-0.2%
60	Montenegro	3.96	-1	0.9%	-0.2%
61	Egypt	3.96	5	4.3%	-0.2%
62	Peru	3.90	7	3.5%	-1.5%
63	Panama	3.90	-6	-1.2%	-1.6%
64	Dominican Republic	3.88	1	1.8%	-2.0%
65	Latvia	3.88	-11	-3.0%	-2.1%
66	Albania	3.87	12	5.9%	-2.4%
67	Oman	3.87	-7	-1.2%	-2.5%
68	Serbia	3.86	3	2.7%	-2.8%
69	Philippines	3.84	-2	1.7%	-3.1%
70	Jordan	3.81	2	2.0%	-4.0%
71	Uruguay	3.79	-3	0.4%	-4.3%
72	Armenia	3.73	-8	-2.4%	-5.9%
73	Iran, Islamic Rep.	3.72	4	1.5%	-6.3%
74	Barbados	3.71	-1	-0.4%	-6.5%
75	Botswana	3.71	6	2.5%	-6.5%
76	Sri Lanka	3.69	-1	0.0%	-6.8%
77	Kenya	3.68	-1	0.1%	-7.1%
78	Uzbekistan	3.68	16	7.8%	-7.3%
79	Lebanon	3.66	1	0.8%	-7.6%
80	Ecuador	3.66	-6	-1.0%	-7.6%

Rank	Economy	Score ²	Change since 2019 ³		Diff. from TTDI Avg. (%)
			Rank	Score	
81	Tanzania	3.65	7	4.5%	-7.9%
82	Morocco	3.64	-12	-3.2%	-8.2%
83	Tunisia	3.60	2	1.0%	-9.2%
84	Jamaica	3.59	-1	-0.1%	-9.5%
85	Mongolia	3.57	-6	-2.0%	-9.8%
86	Cambodia	3.57	4	2.5%	-10.0%
87	North Macedonia	3.53	-5	-1.9%	-10.9%
88	Moldova	3.53	1	1.0%	-11.1%
89	Trinidad and Tobago	3.52	-5	-2.1%	-11.3%
90	Bosnia and Herzegovina	3.51	1	1.1%	-11.5%
91	Lao PDR	3.48	2	1.7%	-12.1%
92	Paraguay	3.47	0	0.8%	-12.5%
93	Rwanda	3.45	6	2.6%	-12.9%
94	Bolivia	3.45	3	2.1%	-12.9%
95	Namibia	3.45	-8	-1.7%	-13.0%
96	Kuwait	3.44	-10	-2.9%	-13.2%
97	El Salvador	3.43	4	4.0%	-13.4%
98	Algeria	3.42	2	2.6%	-13.6%
99	Tajikistan	3.42	-3	0.7%	-13.7%
100	Guatemala	3.42	-5	0.5%	-13.8%
101	Pakistan	3.41	3	3.6%	-14.0%
102	Kyrgyz Republic	3.38	1	2.8%	-14.7%
103	Venezuela	3.34	-5	-0.9%	-15.7%
104	Zambia	3.34	-2	1.4%	-15.7%
105	Nepal	3.34	0	2.8%	-15.7%
106	Ghana	3.28	1	1.5%	-17.2%
107	Senegal	3.24	2	2.5%	-18.2%
108	Nicaragua	3.24	-2	0.0%	-18.3%
109	Bangladesh	3.19	2	3.0%	-19.5%
110	Zimbabwe	3.19	0	2.5%	-19.6%
111	Honduras	3.19	-3	-1.4%	-19.6%
112	Nigeria	3.18	1	4.2%	-19.8%
113	Benin	3.16	-1	3.3%	-20.4%
114	Côte d'Ivoire	3.13	2	6.4%	-21.0%
115	Malawi	3.06	0	2.8%	-22.8%
116	Angola	3.05	-2	1.3%	-22.9%
117	Cameroon	2.99	0	3.1%	-24.6%
118	Sierra Leone	2.89	0	2.7%	-27.1%
119	Mali	2.78	0	-0.4%	-30.0%

- The Americas
- Asia-Pacific
- Europe and Eurasia
- Middle East and North Africa
- Sub-Saharan Africa

- Index results represent the latest data available at the time of collection (end of 2023).
- Overall scores range from 1 to 7 where 1 = worst and 7 = best.
- Change since 2019 refers to 2019 results using new index framework and methodology.

Source: World Economic Forum.





HOY ES EL MOMENTO DE PASAR A LA ACCIÓN

EL AEROPUERTO INTERNACIONAL DE LA AURORA PRESENTA GRANDES RETOS Y CARENCIAS



RANKING
1
2
3
4
5
6
7
8
9
10

PASAJEROS INTERNACIONALES DESDE Y HACIA GUATEMALA

PARTICIPACIÓN 2019

1	50,1%	ESTADOS UNIDOS
2	12,3%	MÉXICO
3	7,7%	COSTA RICA
4	3,8%	PANAMÁ
5	3,2%	COLOMBIA
6	3,1%	HONDURAS
7	2,7%	ESPAÑA
8	2,4%	CANADÁ
9	2,3%	EL SALVADOR
10	1,7%	NICARAGUA
	10,7%	RESTO

PARTICIPACIÓN 2024

1	51,8%	ESTADOS UNIDOS
2	10,5%	MÉXICO
3	7,5%	COSTA RICA
4	5,2%	COLOMBIA
5	3,2%	HONDURAS
6	3,1%	PANAMÁ
7	2,3%	ESPAÑA
8	2,2%	CANADÁ
9	2,2%	EL SALVADOR
10	1,9%	REP. DOMINICANA
	10,0%	RESTO

RUTAS TOTALES

	Sep 2019	Sep 2023	Sep 2024	24vs19	24vs23
Costa Rica	78	69	71	-9,0%	2,9%
El Salvador	28	28	28	0,0%	0,0%
Guatemala	25	36	30	20,0%	-16,7%

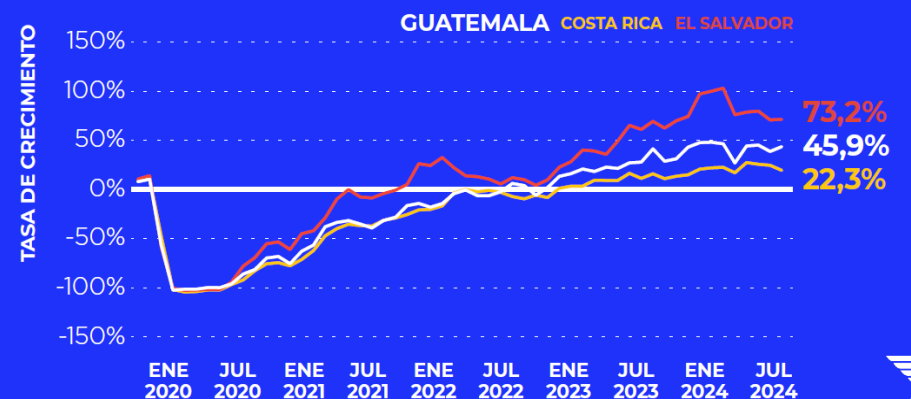
FRECUENCIAS TOTALES

	Sep 2019	Sep 2023	Sep 2024	24vs19	24vs23
Costa Rica	4.890	5.331	4.651	-4,9%	-12,8%
El Salvador	1.861	1.676	1.676	-9,9%	0,0%
Guatemala	1.674	1.915	1.789	6,9%	-6,6%

ASIENTOS TOTALES

	Sep 2019	Sep 2023	Sep 2024	24vs19	24vs23
Costa Rica	316.162	358.808	328.748	4,0%	-8,4%
El Salvador	269.820	294.438	302.132	12,0%	2,6%
Guatemala	164.500	252.079	247.387	50,4%	-1,9%

EVOLUCIÓN DEL NÚMERO DE PASAJEROS - VS NOV.19

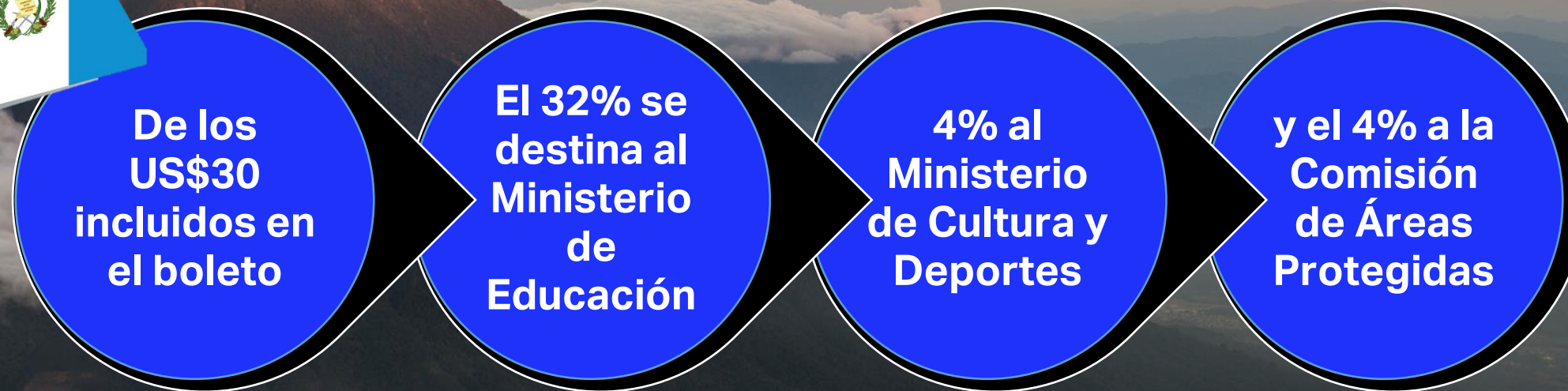




**SE REQUIERE ABORDAR LOS RETOS ESTRUCTURALES DEL
AEROPUERTO EN EL CORTO, MEDIANO Y LARGO PLAZO**

**ADOPTAR UN MARCO
REGULATORIO QUE
INCLUYA LAS
MEJORES PRÁCTICAS
Y ESTÁNDARES
INTERNACIONALES**

AUMENTAR LA COMPETITIVIDAD DEL TRANSPORTE AÉREO

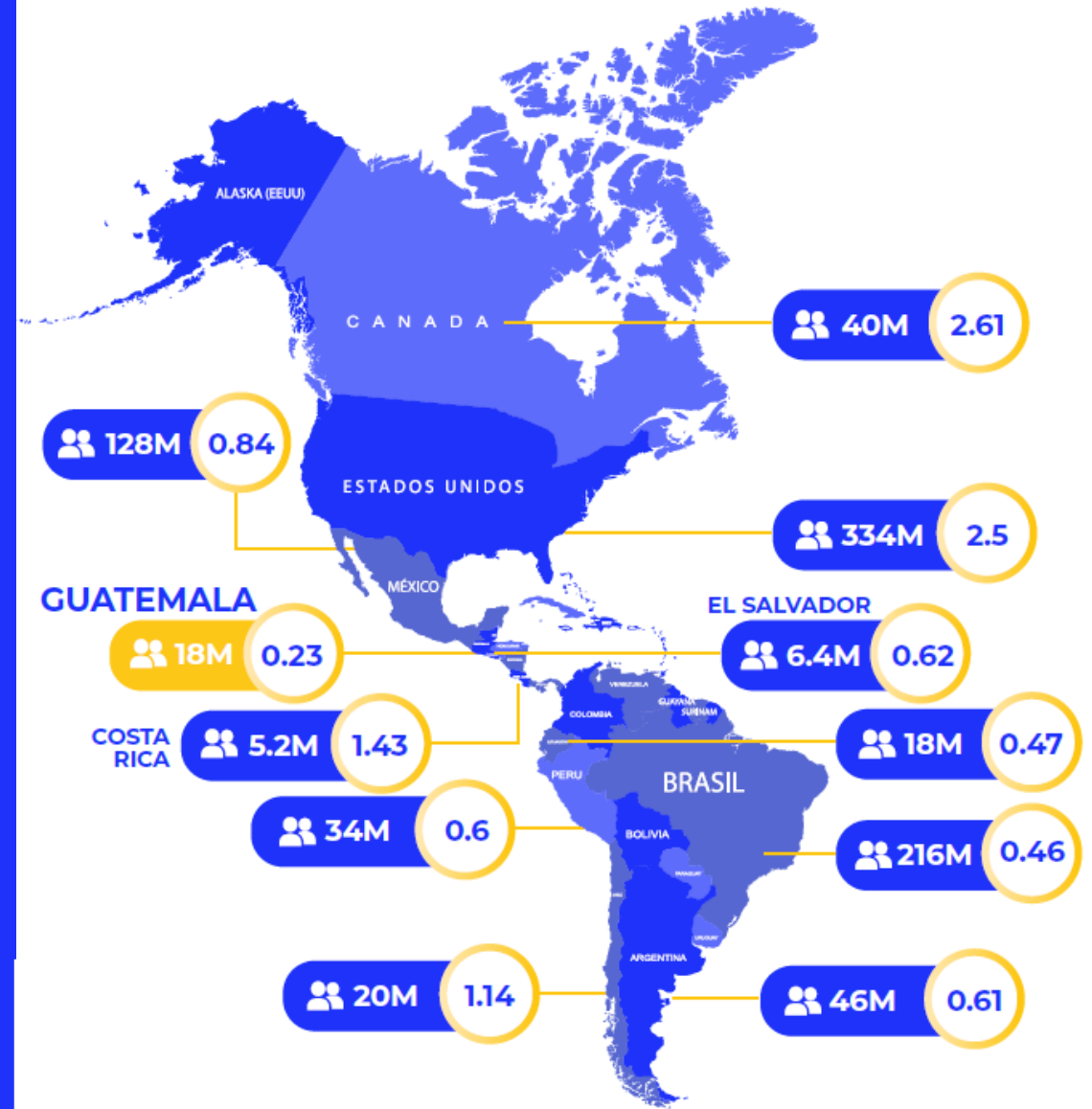


NO PUEDE SER COMPETITIVO SI EL 40% DE LA TASA AEROPORTUARIA SE DESTINA A ACTIVIDADES NO RELACIONADAS CON EL SECTOR



MÁS DEL 90% DEL TURISMO LLEGA POR LA VÍA AÉREA

OPORTUNIDAD DE ACERCAR VIAJES AÉREOS A MÁS GUATEMALTECOS QUE NUNCA HAN VOLADO



POBLACIÓN TOTAL
2023*



VIAJES PER
CÁPITA 2023*



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Gracias



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