



21/11/2017

Summer Holidays maintain steady growth in International arrivals in Europe for third quarter of 2017 thanks to long-haul travellers

The latest results from the Air Travellers' Traffic Barometer* produced by European Cities Marketing and ForwardKeys feature an overall recovery of International arrivals throughout Europe for Q3 2017, by virtue of the arrival of the summer holidays.

Number of long haul travellers increased by 8.0% in Q3 2017 compared to Q3 2016

Total International arrivals in Europe grew by +8.0 %, driven by the long haul markets for two consecutive quarters (+13.4 % for Q2, and +13 % for Q3). Arrivals in Q3 from major non-European markets such as the U.S.A., Mexico, India, China or Algeria retained solid double-digit growth above 10% in each region, largely due to the summer holidays, which were a major contributor to boosting long haul travelling.

Despite its relatively small market share, arrivals from Central & South America continued the double-digit growth (+16.4 %) for the fourth consecutive quarter thanks to Brazil, Colombia, Chile and Peru.

However, Intra-European arrivals did not pick up in Q3, with a reported +3.7 % mild growth. Russia and Turkey led the growth with departures increasing above +30 % Year on Year, while markets with largest shares such as Germany, the UK, and France showed a mild positive performance.

Leisure travel maintained a rapid growth in Q3. Medium to long stays accounted for 64 % of the markets. As a consequence of this solid increase of long haul arrivals, many passengers have felt surges of longer lead times.

Top 10 European destinations in terms of bookings for Q3 2017

London and Paris are still the most popular destinations for long haul travellers in terms of market share. Rome was on the momentum of regaining its position as a top destination, and moved up to the 3rd position (from the 7th position in the Q1 barometer). However, increase in share was only slightly greater than those of Istanbul, Amsterdam and Frankfurt.

Growth in this quarter was highest for Istanbul (+35.4 %), also recovering from its inbound tourism plunge attributed to the terrorist attack last summer.

As is to be expected, outbound from China is leading the growth region, largely due to the increased national day holiday travel.

Even though Barcelona has since dropped out of the Top 10 due to both terrorist attacks and the political tension in the region, it has still shown a very positive outlook since political unrest was not felt until October 1st. On the other hand, Mediterranean cities, such as Madrid, Istanbul and Lisbon consolidate as popular destinations and are also likely to continue their optimistic pace of growth in Q4.

Bookings for Q4 2017 expected to continue on steady growth trend from Q3 2017, predicting optimistic results

As of September 30th, advanced bookings for international arrivals in Europe in Q4 are 9.6 % ahead, with a greater increase from long haul markets (+15.6%). Still enjoying greater increases than the intra-European flows, long haul regional markets have an optimistic double-digit increase in bookings from all regions. As an example, bookings from Asia and Oceania are 23.2 % ahead and outperform the other regions.

Figure 1:



The Q4 2017 booking situation is optimistic for top European destinations. The devaluation of the pound sterling has boosted visitor attractiveness and made London a key European destination. Surprisingly, Paris already stands out with a 14 % share with bookings being 19.2 % ahead for Q4, showing a fast recovery from the suffered terrorist attacks.

All ECM members have exclusive access to the complete European Cities Marketing-ForwardKeys Air Travellers' Traffic Barometer with all the graphs and analysis.

*This analysis is based on Air Reservation Data propriety of ForwardKeys® as of 30th September 2017. Perimeter: Includes air reservations made by passengers arriving in Europe and staying at least one night in destination, therefore excluding: "Transits", "Day trips", "One-way trips" and "Returns".
 Arrival period: 1st July - 30th September 2017 vs 1st July - 30th September 2016
 Booking situation for next quarter: Arrivals between 1st October and 31st December 2017 vs. 1st July and 30th September 2016 according to bookings issued as of 30th September 2017 vs. as of 30th September 2016.
 Historical information: Arrivals in the 4 previous quarters (October - December 2016, January - March 2017, April - June 2017, July - September 2017).

****ENDS****

* **ForwardKeys.com** is a service of Forward Data S.L, a Market Research and Consulting Company registered in Spain. ForwardKeys is a Business Intelligence service bringing a new approach to operational traveller data intelligence for Hotels Chains, Tourism boards and Destination Management Organizations (DMOs) leveraging non confidential Air reservation information. ForwardKeys provides to:

- DMOs and Tourism Boards with travellers' trends information and means to monitor and measure the impact of their marketing efforts to drive more business to their destination.
- Hotel chains with ways to quantify future demand and anticipate market trends to optimize sales, marketing and revenue management efforts, using traveller's reservation, source market, arrival, return date and future travel information.

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***European Cities Marketing** is a non-profit organisation improving the competitiveness and performance of leading cities of Europe by providing a platform for convention, leisure and city marketing professionals to exchange knowledge, best practice and widen their network to build new business. European Cities Marketing is promoting and linking the interests of members from more than 100 major cities in 36 countries.

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