News Release

8th August 2018

UK travellers flock back to Turkey, Tunisia and Egypt

Terror threats perceived to have diminished

Tourists from the UK are heading back to favourite holiday destinations that until recently were considered by many to be at risk of unrest or terrorism, according to the latest findings from ForwardKeys and GfK which predicts future travel patterns by analysing booking transactions by travel agents.

The big winners are Turkey, Tunisia and Egypt, although the two Arab countries have yet to recover their full potential. Turkey with the biggest market share of the three, is showing a 66.4% growth in UK leisure bookings on last year; Egypt is ahead 50.9%, and Tunisia - with a 0.7% share - is ahead 901.0%.

British leisure travel for summer 2018 (May to Oct): key summer destinations, short & mid haul

Top destinations	YoY*	Share (of UK travel to short & mid haul destinations)
Spain	-2.9%	46%
Greece	+11.5%	18%
Turkey	+66.4%	11%
Cyprus	+6.0%	6%
Italy	+1.8%	5%
Portugal	-1.3%	5%
Croatia	+12.1%	3%

Fastest growing destinations	YoY*	Share (of UK travel to short & mid haul destinations)
Tunisia	+901.0%	0.7%
Montenegro	+468.4%	0.2%
Turkey	+66.4%	11%
Egypt	+50.9%	1.3%
Bulgaria	+20.2%	1.7%
Israel	+19.2%	0.3%
Malta	+13.7%	0.8%

*with bookings issued until 7th July

Departures between 1st May and 31st October 2018 as of 7th July 2018 vs. same dates in the previous year.

Only considered leisure travellers staying at least a night at the destination as part of a round trip.

Considered indirect distribution channel & tour operator bookings.

Leisure bookings to more traditional safe destinations, Spain and Portugal have fallen back 2.5% and 0.2% respectively, according to the combined ForwardKeys and GfK data, although their visitor numbers have been kept high in recent years as a result of the threats to other destinations.

Destinations gaining share (May to Oct 2018)

Destination	YoY	Share (of UK int'l leisure travel)	Share diff. vs. summer 2017 (p.p.)
Total short & mid haul destinations	+7.7%	62%	1.9 ▲
Turkey	+66.4%	7%	2.5 ▲
Greece	+11.5%	11%	0.7 ▲
Tunisia	+901.0%	0%	0.4 ▲
Egypt	+50.9%	1%	0.3 ▲

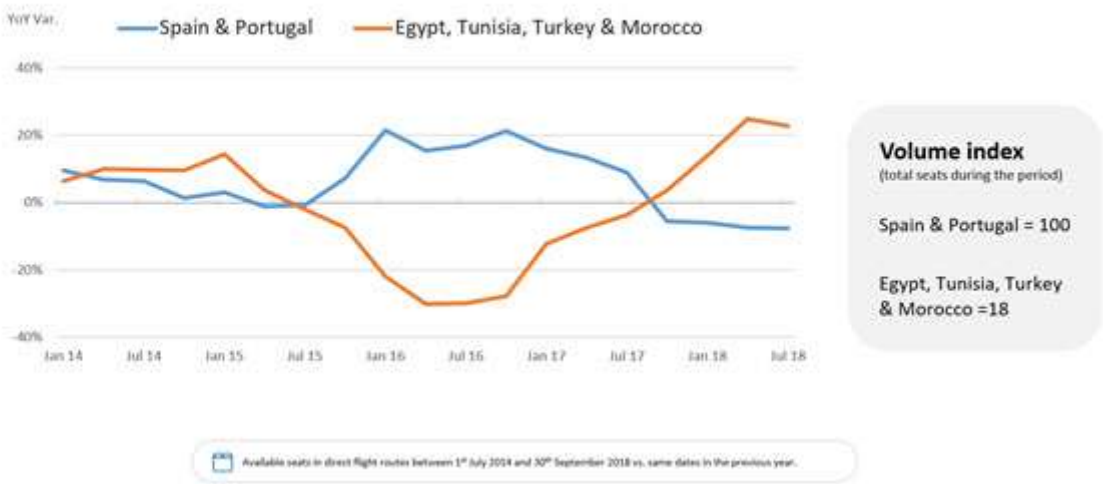
Destinations losing share (May to Oct 2018)

Destination	YoY	Share	Share diff. vs. summer 2017 (p.p.)
Spain	-2.9%	29%	▼ -2.5
Portugal	-1.3%	3%	▼ -0.2
Italy	+1.8%	3%	▼ -0.1

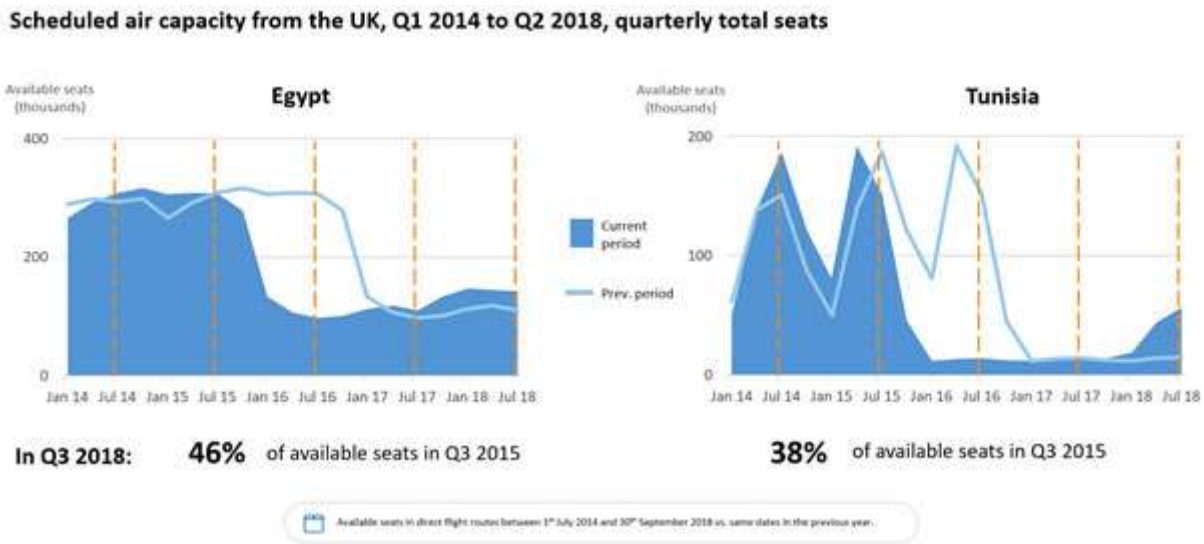
Departures between 1st May and 31st October 2018 as of 7th July 2018 vs. same dates in the previous year. | Only considered leisure travellers staying at least a night at the destination as part of a round trip. | Considered indirect distribution channel & tour operator bookings.

The findings reveal the true impact that terrorism had on Middle Eastern and North African destinations in the last few years, including Morocco, and show that recovery has only recently begun.

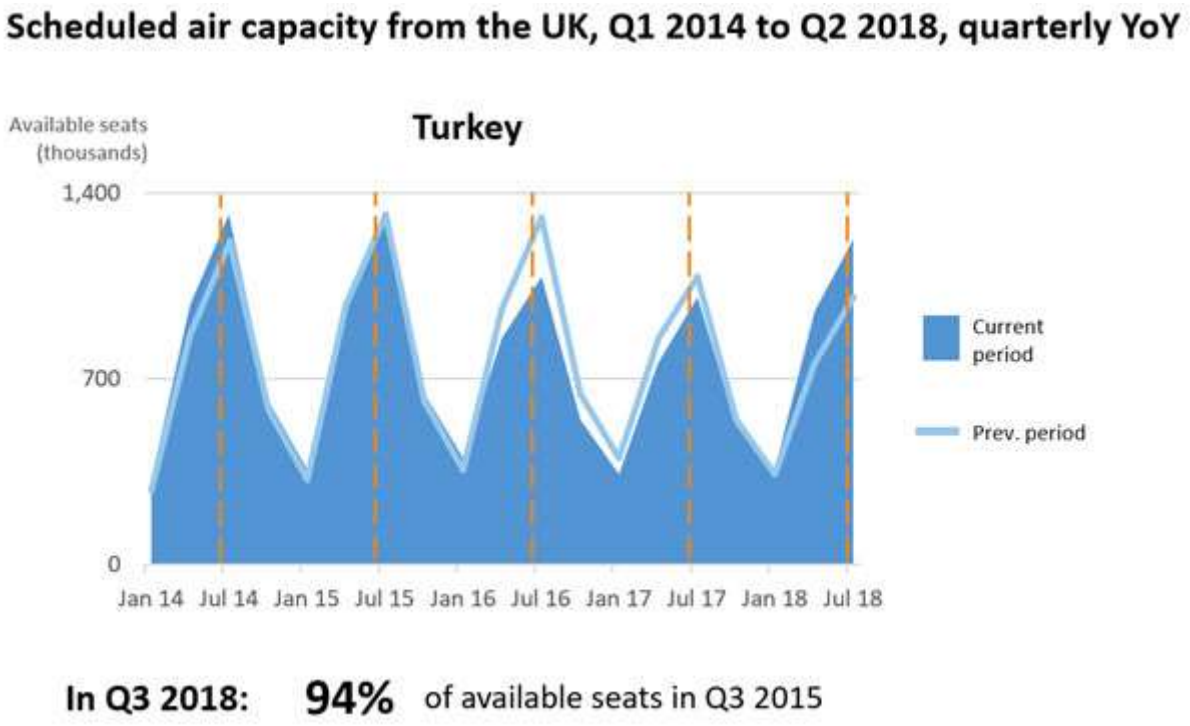
Scheduled air capacity from the UK, Q1 2014 to Q2 2018, quarterly YoY Variations



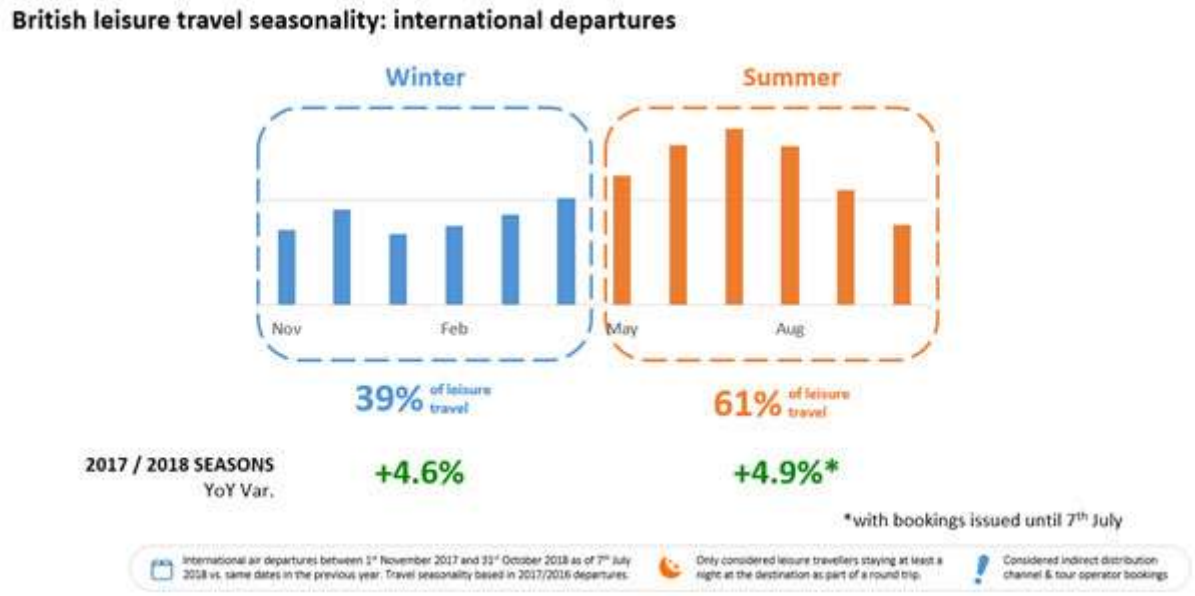
In terms of scheduled capacity, Egypt and Tunisia both have a long way to go to reach their 2015 levels. In the third quarter of this year, Egypt has 46% of seats available three years ago, and Tunisia, 38%.



However, Turkey's recovery is progressing much better. Seats on direct flights from the UK are back to 94% of what they were in 2015.



The latest ForwardKeys and GfK research – carried out for a joint presentation with HSBC Global Research – shows that overall UK leisure travel is ahead 4.9% this summer.



ForwardKeys CEO and co-founder, Olivier Jager, said: “These findings illustrate the ultimate resilience of travel and tourism. Tourists are prepared to reassess their impressions of a destination if it manages to remain safe for an extended period of time. It’s encouraging that the countries previously affected by unrest are seeing their tourist marketing efforts pay off in hard figures.”

David Hope, Senior Client Insight Director, GfK market research, said: “The growth is driven by the dynamism of short and mid haul summer destinations, up by 7.7%. These destinations represent around 60% of British international travel in the summer period.

“British tourists are flocking back to Turkey, Tunisia and Egypt, after the security incidents in 2015 and 2016. Spain and Portugal will see slightly fewer tourists, while other European destinations, including Greece, Croatia and Bulgaria, maintain an optimistic outlook.

“The full recovery of North African destinations will require some time. This summer, the scheduled air capacity will be only half of what it was in 2015 for Tunisia and Egypt.”

Ends

About ForwardKeys

ForwardKeys analyses more than 17m flight booking transactions a day, drawing data from all the major global air reservation systems and selected airlines and tour operators. This information is enhanced with further independent data sets, including flight search and official government statistics, plus data science to paint a picture of who is travelling where and when. ForwardKeys’ analytics are used by travel marketers, retailers, hotels, destination marketing organisations (DMOs), financial institutions, car rental companies, tour operators, online travel agents (OTAs) and other traveller-focussed businesses worldwide to monitor and anticipate traveller arrivals from a particular origin market at a specific time. This analysis enables parties to anticipate the impact of events, better manage their staffing levels, fine tune supply requirements, adjust and measure the effectiveness of their marketi ng efforts and anticipate future market trends.

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About GfK

GfK connects data and science. Innovative research solutions provide answers for key business questions around consumers, markets, brands and media – now and in the future. As a research and analytics partner, GfK promises its clients all over the world “Growth from Knowledge”.

For more information, please visit www.gfk.com or follow GfK on Twitter: https://twitter.com/GfK

GfK's Travel Insights is based on travel bookings at the point of sale from around 2,450 travel agents and 25 tour operator brands. The booking data is sourced from reservation and back-office systems and is updated on a weekly basis.