



14/03/2019

The increase of long-haul arrivals in Europe in Q4 2018 was fuelled by visitors from North America and the Middle East

European air routes – best connected European cities, by air capacity volume

Oct-Dec 2018 vs Oct-Dec 2017 ; Share of Oct-Dec 2018

	Total seats'000s	Share	Variation
Total intra-European	193,787	100%	9.1%
London (GB)	15,598	8.0%	3.6%
Paris (FR)	7,293	3.8%	7.2%
Amsterdam (NL)	7,069	3.6%	13.9%
Frankfurt (DE)	6,025	3.1%	6.5%
Istanbul (TR)	5,583	2.9%	4.8%
Munich (DE)	4,321	2.2%	4.6%
Milan (IT)	4,314	2.2%	6.7%
Barcelona (ES)	4,208	2.2%	5.6%
Rome (IT)	4,099	2.1%	9.0%
Vienna (AT)	4,002	2.1%	21.0%

*European air routes - best connected European cities by air capacity volume
(Capacity Oct-Dec 2018 vs. Oct-Dec 2017 ;
Share of Oct-Dec 2018)*

The latest results from the Air Travellers' Traffic Barometer*, produced by European Cities Marketing and ForwardKeys, highlighted that long-haul arrivals in Europe went up by an overall 7.5% during the last quarter of 2018. The increase was fuelled by visitors from North America (+10.6%), the biggest contributor of overseas arrivals into Europe with a 36% share of total long-haul arrivals; and the Middle East (+10.2%), with a 10% share.

Intra-European air capacity grew by 9.1% in Q4 2018

Among the best-connected destinations, in terms of intra-regional capacity volume, London and Paris took the lead with 8% and 4% share respectively. Amsterdam (4% share) enjoyed solid increases in the number of seats +13.9% and it is set to continue in Q1 2019, positioning itself in second place after London. In their respective lower shares, Seville (+29.1%), Vienna (+23.7%) and Palma de Mallorca (+19.9%) are set to enjoy the fastest air capacity growth during the first quarter of 2019 compared to last year.

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(+10.2%), with a 10% share. They both gained a percentage point of share compared to the same period last year, due to their solid performances.

Although Europe welcomed an increase in the number of visitors from all long-haul subcontinents in Q4 2018 compared to the same period last year, the growth rate decelerated for all of them, except for North America which remained at a similar level as the growth registered in Q4 2017.

The top 10 most visited European cities by long-haul travellers in Q4 2018 remained the same as the previous quarter.

London (18% share) and Paris (15% share) maintained their predominance as the top two destinations for overseas travellers in terms of volume. Istanbul was the third preferred destination for long-haul visitors in Q4 with a 9% share thanks to its solid performance. Istanbul recorded the fastest growth (+38.3%), which was more than double that of the second fastest growing destination, Stockholm (+18.7%). Madrid and Barcelona overtook Amsterdam in terms of volume; and Milan went up by one place, just above Munich.

Forward bookings for long-haul arrivals in Q1 2019 are ahead by 8.0%.

North America registers the most optimistic booking situation compared to last year (+13.7% ahead), followed by Asia & Oceania (+10.0%), and Africa (+7.3%). However, Central & South America and the Middle East lag in bookings by 3.2% and 3.4% respectively.

London (16% share) and Paris (14% share) are still the preferred destinations for the first quarter of 2019, followed by Rome (9% share). However, while London and Rome are advanced in bookings by 5.2% and 8.2% respectively, Paris slightly lags by 0.3%. Lisbon makes it to the top 10 European destination cities for long-haul travellers in Q1 2019, replacing Munich, as per current booking situation. The destinations leading the growth changed significantly in relation to the previous quarter. Stockholm takes the lead with a 32.5% growth, closely followed by Istanbul (+31.8%). The list welcomes new additions such as Prague (+20.9%), (+13.5%), Lisbon (+12.9%) and Tallinn (+11.4%), as per current bookings.

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

**This analyse is based on Air Reservation Data propriety of ForwardKeys® as of 31st December 2018. 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: 1 October - 31 December 2018 vs. 1 October - 31 December 2017.
Booking situation for next quarter: 1 January - 31 March 2019 vs. 1 January - 31 March 2018 according to bookings issued as of 31 December 2018 and as of 31 December 2017.*

***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 110 major cities in 38 countries.

For more information and pictures, please contact:
Flavie Baudot, press@europeancitiesmarketing.com, +33 380 56 02 00

***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.

Contact information

Laurens van den Oever, press@forwardkeys.com

ECM Head Office
29D rue de Talant | 21000 Dijon | France
Tel: +33 380 56 02 04
Fax: +33 380 56 02 05
press@europeancitiesmarketing.com



ECM Head Office, 29D rue de Talant, 21000 Dijon, France

Constant Contact 

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