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News Release



Petra Stušek, ECM President



Olivier Ponti, VP Insights, ForwardKeys

Tourist hotspots glimmer in Europe's travel gloom

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The latest edition of the ECM-ForwardKeys Quarterly Barometer, published jointly by ForwardKeys, the travel analytics company, and the non-profit organisation, European Cities Marketing, reveals that Europe's most resilient destinations in the face of the devastating COVID-19 pandemic are leisure hotspots.

As at 27th October, total inbound flight bookings for the EU and the UK, for the fourth quarter of 2020, were 85.6% behind where they were at the equivalent moment last year. Symbolically, Paris, which is normally Europe's second most popular destination, has climbed to top spot, even though its bookings are 82.3% behind 2019 levels.

In a ranking of the EU's most resilient major cities (ie: cities with at least 1.0% share of international arrivals), the news is not quite so awful; and a common theme is that all are major leisure destinations. Top of the list is Heraklion, the capital of Crete, known for the ancient Palace of Knossos. There, flight bookings are only 25.4% behind their 2019 level. In second place is Faro, the gateway to Portugal's Algarve region, which is known for its beaches and golf resorts, 48.7% behind. The next three positions are taken by Athens, 71.4% behind; Naples, 73.4% behind; and Larnaca, 74.2% behind. The cities in the second half of the list, in descending order, comprise Porto, 74.5% behind; Palma Mallorca, 74.6% behind; Stockholm, 75.8% behind; Malaga, 78.2% behind; and Lisbon, 78.8% behind.

Most resilient EU destinations* for Q4 2020



	Most resilient cities	YoY variation
1 st	Heraklion (GR)	-25.4%
2 nd	Faro (PT)	-48.7%
3 rd	Athens (GR)	-71.4%
4 th	Naples (IT)	-73.4%
5 th	Larnaca (CY)	-74.2%
6 th	Porto (PT)	-74.5%
7 th	Palma Mallorca (ES)	-74.6%
8 th	Stockholm (SE)	-75.8%
9 th	Malaga (ES)	-78.2%
10 th	Lisbon (PT)	-78.8%

*Cities with at least 1.0% share of EU & UK international arrivals



Tickets issued as 27 Oct 2020 vs same period last year, for travel between 1 October to 31 December 2020 vs same dates in 2019.



Only considered pax staying 1 to 21 nights at destinations.



Source: ForwardKeys Air Ticket Data.

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Olivier Ponti, VP, Insights, ForwardKeys, said: *“When one digs into the data behind these headline numbers, we see that people are still making travel plans; and within those plans there are five clear trends. First, leisure and personal travel is holding up much better than business travel, which is virtually non-existent right now. Second, bookings are dominated by*

the Christmas holiday period. Third, people are booking at even shorter notice than usual, probably wary of travel restrictions being imposed without warning. Fourth, fares are consistently on the low side, with airlines doing everything in their power to tempt back travellers; and fifth, destinations which have remained open to EU travel, such as Stockholm, have suffered relatively less badly.”

Petra Stušek, ECM President, concluded: *“Once again the ECM-ForwardKeys Air Travellers' Traffic Barometer allows us, as destination marketing organisations (DMOs), to identify trends which, in this time of crisis, are clearly different from what we experienced last year. Since 2013 ForwardKeys has provided ECM Members with a quarterly report that gives us important data on air traffic and an interesting analysis of tourist activities in our territories. The data from the latest barometer show the power and resilience of cities, even though the meetings industry is still running behind; and the past months were very difficult for city tourism. This challenging time is frustrating for stakeholders within destinations and for DMOs. At ECM, we are developing various tools and content to support our members on their path to recovery.”*

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About European Cities Marketing

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 115 major cities in 39 countries.

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About ForwardKeys

ForwardKeys helps its clients measure and improve the effectiveness of their marketing & operations; anticipate the impact of events; and capitalise on future trends. Its data scientists do so by analysing an unparalleled amount of air travel information to produce valuable insights into the profile, behaviour and impact of past, present and future travellers. Sources include airline capacity plus over 17m booking transactions and 7m flight searches per day. Customers are brands, retailers, duty-free specialists, financial institutions, media agencies and travel marketers worldwide.

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