

European city tourism on track to recovery in Q4 2022

While international travel recovery worldwide in Q4 tracks 30% below 2019 levels, the European continent overperforms the world average at -24%. This also represents an acceleration compared with the -30% registered in Europe in Q3.

Most importantly, even though Southern Europe is still leading the way (at -14% in international arrivals), other parts of the continent are catching up: Northern Europe (-20%), Western Europe (-26%) and Central and Eastern Europe (-55%).

“Southern Europe is still leading the way and other parts of Europe are also making good progress as can be seen in Northern Europe during the popular winter season. On the flip side, the performances of Central and Eastern Europe are still negatively affected by the war in Ukraine, which is impacting not only on the countries directly involved but also on neighbouring destinations,” says **Olivier Ponti**, VP of Insights at *ForwardKeys*.

Urban destinations, which were heavily affected by the Covid crisis, are now closing the gap with other forms of city tourism. This trend is exemplified by the evolution of the CityDNA City index, which compounds information on European cities, and registers a 23% decrease in international arrivals in Q4, in line with the European average of -24%.

In the last quarter of 2022, London (-23% in international arrivals), Paris (-18%) and Istanbul (+9%), register the highest number of international arrivals, a clear sign that international travellers are finding their way back to Europe’s larger metropolises and their large cultural supply.

“The good results of Istanbul have been made possible by a rapid expansion of the destination’s air connectivity, a weak lira and a steady “open for business” policy. Compared with 2019, Istanbul registers 6% more seats on international flights,” adds **Ponti**.

When looking ahead at the 2023 outlook, Q1 in Europe is off to a good start as well at just -20% international arrivals compared to 2019 levels.

“The sustained recovery of international travel to European cities is very encouraging to see, after all the challenges our members have endured in the past years. The return of travellers to our destinations puts international cooperation and sustainability at the centre of our strategy,” says the President of *City Destinations Alliance*, **Petra Stuček**.

“We, and our Destinations Management Organisations (DMOs) members, are strongly committed to rebuilding tourism and making our destinations achieve an even higher quality of life and better possibilities for employment,” adds **Stuček**.