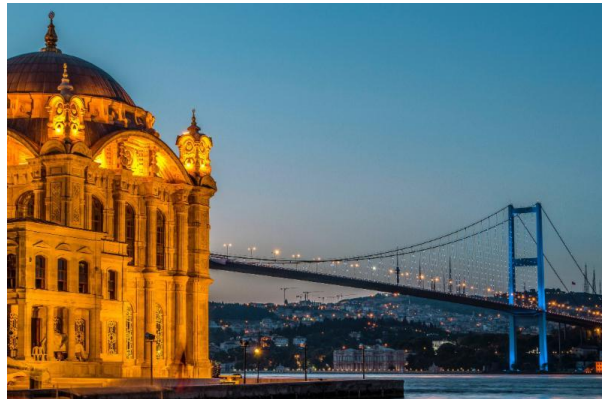




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Istanbul is expected to be Europe's tourism hot spot in Q3 2019



A study undertaken for European Cities Marketing (ECM) by ForwardKeys, which analyses over 17 million flight booking transactions a day, reveals that Istanbul is set to be Europe's city tourism hot spot in the third quarter of 2019 (July 1st - September 30th). In making its determination, ForwardKeys looked at the growth in airline seat capacity and the growth in long-haul flight bookings to 30 major European cities included in the ECM-ForwardKeys Air Travellers' Traffic Barometer*.

Olivier Ponti, ForwardKeys, VP Insights, said: "Seat capacity is a very strong predictor of visitor arrivals because once airlines have decided to lay on flights, they set out to fill their planes and, as part of their promotional strategy, they can always flex the price to help them do so. Long-haul bookings are another useful indicator because long-haul travellers tend to book earlier, to stay longer and to spend more money. When we looked at both metrics, Istanbul stood out on both counts."

The total number of seats on sale to Europe in the third quarter of the year is more than 262 million, 3.8% up on Q3 2018. Istanbul, with a 5.5% share of the market, is showing a 10.0% growth in capacity and, as of June 2nd, it is showing forward bookings 11.2% ahead thanks to its new mega-hub Istanbul Airport and decreasing concerns about security. Other destinations set to perform impressively include Budapest, which is also showing a 10.0% increase in capacity and forward bookings 5.9% ahead, Valencia, with 8.5% increase in capacity and forward bookings 15.6% ahead and Dubrovnik, with 8.4% increase in capacity and forward bookings 16.2% ahead.

European cities with the highest growth in regional air capacity and long haul travellers, July to Sep 2019

City	Air capacity YoY	Forward bookings
Istanbul (TR)	+10.0%	+11.2%
Budapest (HU)	+10.0%	+5.9%
Valencia (ES)	+8.5%	+15.6%
Dubrovnik (HR)	+8.4%	+16.2%



Forward bookings: Inland dates from 1 July to 30 Sep 2019 vs. same dates in the previous year, according to bookings issued as of 2 June 2019.
 Air Capacity: flight dates between 1 July 2019 to 30 September 2019 vs. same period previous year.
 Only considered pax staying 1 to 21 nights at destination, as part of a round trip.
 Source: ForwardKeys air reservation data & CIRIUM

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If one focuses exclusively on capacity growth, Seville and Vienna, which are 16.7% and 12.6% up respectively, outstrip Istanbul for percentage growth but they do not handle such a large volume of traffic - Seville has a 0.4% share of total seats, whereas Vienna has 3.9%. Other major airports showing impressive capacity growth are Munich, with a 4.3% share of seats, which is seeing a 6.0% increase in capacity and Lisbon, with a 2.7% share, which is looking at a 7.8% capacity increase.

Top 10 cities with highest growth in air capacity, Jul to Sep 2019

	Total seats	YoY	Share
Total Intra-European	261,586,582	+3.8%	100%
Sevilla (ES)	510,232	+16.7%	0.4%
Vienna (AT)	4,804,133	+12.6%	3.9%
Istanbul (TR)	6,708,990	+10.0%	5.5%
Budapest (HU)	2,454,011	+10.0%	2.0%
Valencia (ES)	1,009,353	+8.5%	0.8%
Dubrovnik (HR)	755,470	+8.4%	0.6%
Lisbon (PT)	3,357,356	+7.8%	2.7%
Florence (IT)	484,856	+6.6%	0.4%
Munich (DE)	5,273,415	+6.0%	4.3%
Prague (CZ)	2,820,406	+4.9%	2.3%

Flight dates between 1 July 2019 to 30 September 2019 vs. same period previous year.
 Source: ForwardKeys & CIRIUM

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Looking only at long-haul forward bookings, Dubrovnik and Valencia are currently top of the list, ahead 16.2% and 15.6% respectively. However, Barcelona, with an 8.1% market share, looks likely to be the standout performer, as third-quarter bookings are currently 13.8% ahead. Spain's capital, Madrid, also looks set to do very well; it has a 7.4% share of capacity and bookings are 7.0% ahead.

Top 10 European city destination for long haul travellers, Jul to Sep 2019

	YoY	Share
Dubrovnik (HR)	16.2%	0.9%
Valencia (ES)	15.6%	0.2%
Barcelona (ES)	13.8%	8.1%
Milan (IT)	11.6%	4.3%
Istanbul (TR)	11.2%	5.8%
Brussels (BE)	9.9%	1.1%
Zurich (CH)	9.8%	4.0%
Geneva (CH)	8.3%	1.5%
Madrid (ES)	7.0%	7.4%
Budapest (HU)	5.9%	3.3%



Travel dates from 1 July to 30 Sep 2019 vs. same dates in the previous year, according to bookings issued as of 2 June 2019.



Only considered pax staying 1 to 21 nights at destinations, as part of a round trip.



Source: ForwardKeys air reservation data.

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Olivier Ponti concluded: *"Before we undertook this study, we had expected much of the growth to be driven by young low-cost airlines increasing capacity - and that is what we have seen in Vienna and Budapest. However, the opposite is true for other destinations, such as Lisbon, Munich and Prague, where capacity growth was predominantly fuelled by legacy carriers. It's not a simple picture."*

Petra Stusek, European Cities Marketing President, declared *"We really value our partnership with ForwardKeys as it helps us, DMOs, predict what will happen next in our destination. All ECM members have exclusive access to 4 editions/year of the ECM-ForwardKeys Air Travellers' Traffic Barometer with all the graphs and analysis of long-haul air arrivals in the previous quarter, booking situation for the coming quarter and air capacity data; all this data is key to ECM members' success in anticipating and therefore managing their destination."*

**The ECM-ForwardKeys Air Travellers' Traffic Barometer covers 46 airports serving the following cities: Amsterdam (NL), Barcelona (ES), Berlin (DE), Brussels (BE), Budapest (HU), Copenhagen, (DK), Dubrovnik (HR), Florence (IT), Frankfurt (DE), Geneva (CH), Hamburg (DE), Helsinki (FI), Istanbul (TR), Lisbon (PT), London (GB), Madeira (PT), Madrid (ES), Milan (IT), Munich (DE), Palma Mallorca (ES), Paris (FR), Prague (CZ), Rome (IT), Sevilla (ES), Stockholm (SE), Tallinn (EE), Valencia (ES), Venice (IT), Vienna (AT), Zurich (CH).*

The full results will be in the next ECM-ForwardKeys Air Travellers' Traffic Barometer published in July. European Cities Marketing (ECM) members received an exclusive preview of this analysis at the ECM International Conference on June 6th, 2019 in Ljubljana.

***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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***ForwardKeys.com** analyses more than 17 million 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 marketing efforts and anticipate future market trends.

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