



**ForwardKeys**  
KNOW TOMORROW'S TRAVELLERS

# Analysis of air flows of European travellers

Developing countries most in demand among  
European travellers

January 2019



CBI  
Ministry of Foreign Affairs





## METHODOLOGY

- The information contained in this report refers to air travel on scheduled flights. The total volume of travellers is an estimation based on the bookings processed by the major GDS (Global Distribution Systems), flight routes and other data sources, including official air traffic statistics from key players (airports, airlines, border control and immigration offices). The total traveller estimation does not include travellers arriving by means of transport different from regular flights; this includes charter flights and other vehicles.
- The air travel forecast for 2019 is based on booking and arrival patterns from the three previous years, and has been adjusted with scheduled air capacity data.



## DESTINATION

Developing countries as per DAC list of ODA recipients, including 146 countries. Focus on top10 destinations for European travellers, including Turkey Morocco, Thailand, Egypt, China, India, Mexico, South Africa, Tunisia and Cuba.



## MARKET

**EU-28:** Denmark, Finland, Ireland, Sweden, United Kingdom, Austria, Belgium, France, Germany, Luxembourg, Netherlands, Bulgaria, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Croatia, Cyprus, Greece, Italy, Malta, Portugal, Slovenia and Spain. **EFTA** :Iceland, Liechtenstein, Norway and Switzerland. EU-28 & EFTA are referred to as "Europe".



## PERIOD & PERIMETERS

**Arrivals history:** from January 2014 to December 2018.

**Forecast:** from January to December 2019

**Length of stay:** only considered travellers with return trips and overnight stay at the destination(s).



## FREQUENTLY USED TERMS

**ARRIVALS:** refers to the number of airline passengers arriving at the destination within a specific time frame.

**FORECAST:** refers to the estimated number of airline passengers arriving at the destination within a specific future time frame.

**BUSINESS TRAVELLERS:** are defined as 1) pax who made their reservations via corporate travel agencies, 2) pax staying only during workweek days in short haul travel and 3) solo travellers staying up to 8 nights in long-haul travel.

**LONG STAYS:** are defined as pax staying 22 or more nights at one destination included in their travel itinerary.

**LEISURE TRAVELLERS:** are pax who don't qualify as Business or Long stays.

**VISITORS:** pax staying at the destination.

**DIRECT BOOKINGS:** refers to air bookings sold without the intermediation of a travel agency.

**ONLINE TA:** travel agencies that operate almost exclusively online.

**CORPORATE TA:** travel agencies primarily dedicated to corporate travel.

**RETAIL TA AND OTHER TRADITIONAL TA:** travel agencies that operate in traditional ways (ie. Shops or over the phone)



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2. DAC List of ODA recipients in 2018 and 2019 (p.8)
3. Focus on top 10 destinations (p.12)
4. CBI Priority countries in 2018 and 2019 (p. 34)



## Main findings – developing countries most in demand among European travellers

- The number of European travellers (defined as air travellers departing from EU-28 and EFTA countries) visiting developing countries (defined as OECD's DAC list of ODA recipients) increased by 7.7% in 2018 and is forecast to continue growing by 3.5% in 2019.
- The top 10 destinations comprised a 56% share of the total European travel and included mostly Upper Middle Income Countries, joined by some Lower Middle Income Countries (Morocco, Egypt and India). The first destination in the ranking qualified as a Least Developed Country was Kenya, in position 31 (out of 146), with 0.7% of European air arrivals in 2018. Upper Middle Income Countries captured most of the European travel (62%), while Least Developed Countries only received 6% of the arrivals in developing countries.
- Turkey was the top destination with a 16.6% share of European arrivals after a solid growth in 2018 (+13.7%). Among the top 10 destinations, Egypt (+45.0%) and Tunisia (+20.3%) welcomed the largest increases in European travellers in 2018, as security concerns that damaged these destinations in recent years faded away and air capacity returned to growth. Other top destinations saw a decline in European air arrivals in 2018, including Morocco (-3.8%), South Africa (-2.5%), Mexico (-10.8%) and Cuba (-16.8%).
- Looking ahead, in 2019 Tunisia is forecast to continue growing (+7.6%) and gain one position in the ranking to 8<sup>th</sup> place, replacing Mexico (+1.8%). Albania (+9.2%) is forecast to enter the top 10 destinations in 2019, replacing Cuba (-2.2%).





## Main findings – top 10 destinations (I)

- Turkey (1<sup>st</sup> position in the rank by number of European air arrivals) had been negatively impacted by terrorist attacks and political instability mainly during 2015 and 2016. European travel to this destination started to rebound in mid 2017 as security concerns faded away. The positive result in 2018 was also favoured by Turkey's Lira depreciation in mid-August 2018 and an increased air connectivity. The opening of the new Istanbul airport will help to boost further air connectivity and maintain the growth dynamic into 2019.
- Morocco (2<sup>nd</sup> position), Egypt (4<sup>th</sup>) and Tunisia (9<sup>th</sup>) also recovered after 2015 and 2016's results were damaged by insecurity. During that period, European arrivals in Morocco declined although this destination hadn't suffered any major attack targeting tourism; it was indirectly damaged by the security concerns about other Southern Mediterranean destinations. In 2018, Egypt, Tunisia and Turkey captured most of the European travelers' growth in the region, resulting in a decline of European arrivals in Morocco (-3.8%); this destination is forecast to recover in 2019 (+5.3%).
- Thailand (3<sup>rd</sup> position) maintained a steady growth in recent years only interrupted in 2016, when some countries - including its top European markets Germany, the United Kingdom and France - issued travel warnings related to bombings at touristic sites. European arrivals continued to grow in 2018 (4.2%) and are forecast to maintain the growing pace in 2019 (+4.6%).
- China (5<sup>th</sup> position) recorded its best result of the last 5 years in 2018 after European arrivals grew by 10.1%. Last year, the EU-China Tourism Year program helped to improve the air connectivity. Among the top 10 destinations, China has the largest proportion of business-related trips of European travellers (35% in 2018).



## Main findings – top 10 destinations (II)

- India (6<sup>th</sup> position) is the only Lower Middle Income Country ranked in the top 10 besides Mediterranean destinations. This destination has a more diverse traveller profile than others in the rank, as business-related trips and long stays – typically related to leisure or VFR segments - amounted to 26% and 30% respectively. However, this destination is highly dependent on the British market (47% of European arrivals in 2018).
- South Africa (7<sup>th</sup> position) lost European air arrivals in 2018 (-2.5%). Last year's results were hampered by the crisis of the destination's flag carrier, South African Airways, and the water crisis in Cape Town, which attracted international media attention in Q1 resulting in a deceleration of travel demand during the following months.
- European arrivals in Mexico (8<sup>th</sup> position) dropped by 10.8% in 2018. This destination faced problems of violence around touristic destinations, deterring travellers from its major European markets, especially the United Kingdom.
- Cuba (10<sup>th</sup> position) received 16.8% less European visitors in 2018. The deterioration of air connectivity damaged the results of this destination. Overall, air capacity in direct flights between EU-28 and EFTA countries, and the Caribbean destination dropped by 8.0% in 2018, with considerable capacity reductions in key airlines – Air France, Condor and KLM. Arrivals are forecast to continue dropping in 2019, -2.2%, as scheduled capacity maintains the negative dynamic.

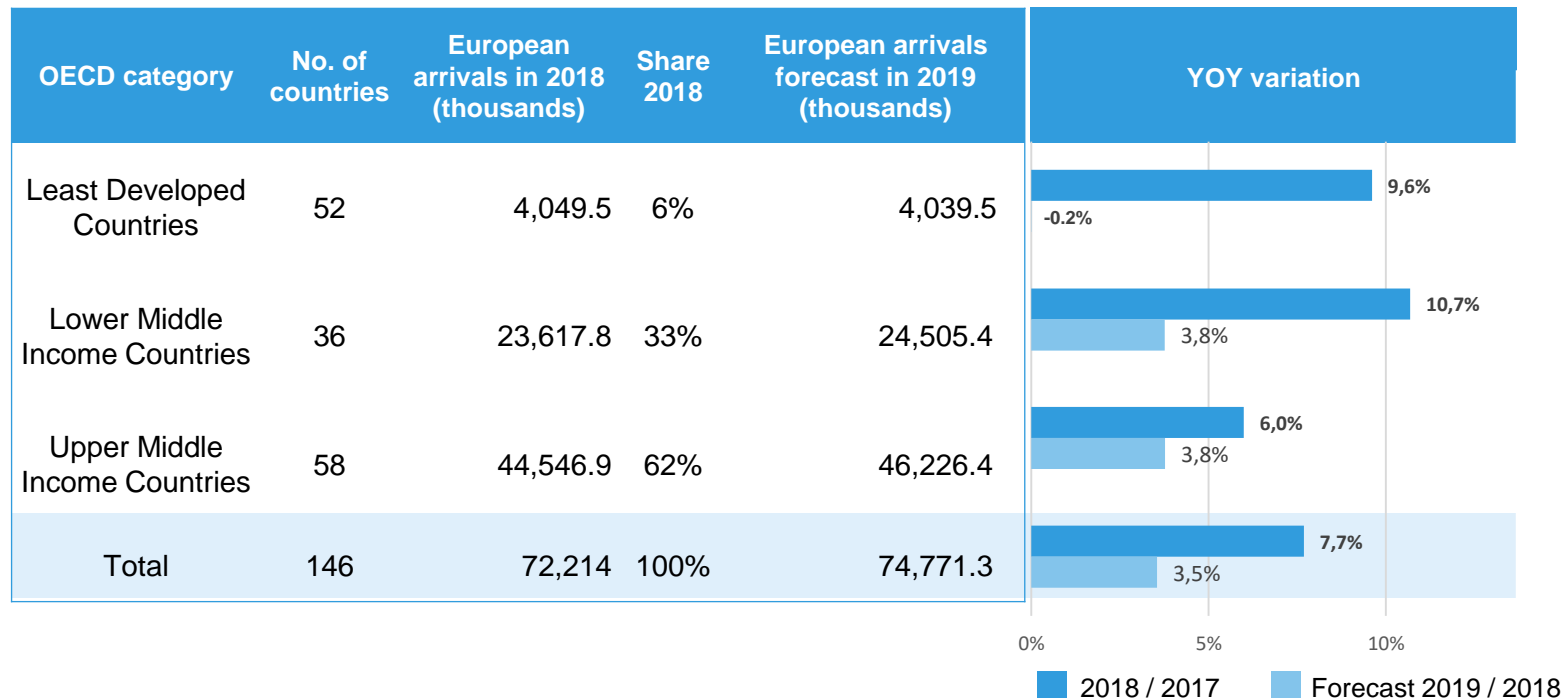



## DAC List of ODA Recipients in 2018 and 2019







## European arrivals in OECD DAC list of ODA recipients



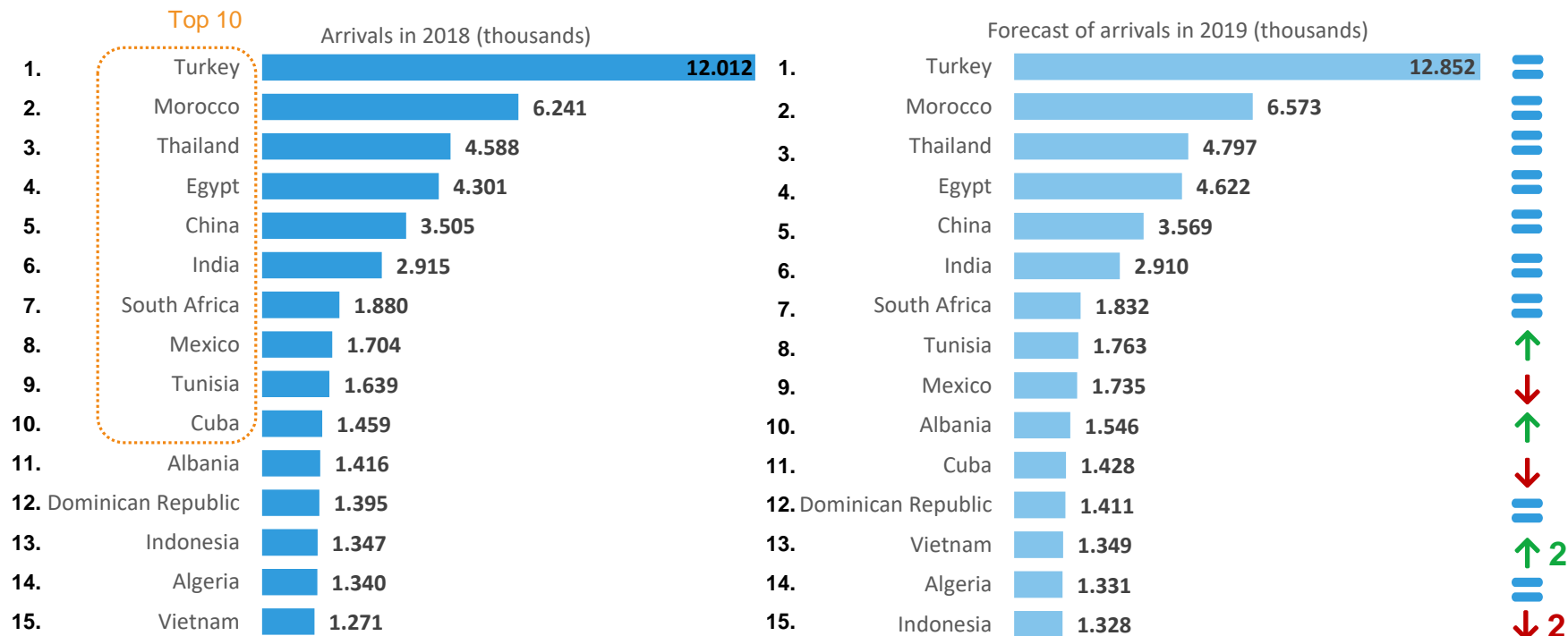
 Arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2018; forecast for arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2019.

 Visitors staying at least 1 night at destination

 Ranking based on total regular air transportation estimation; non-regular flights not included.

# OECD DAC countries: top 30 destinations for European travellers (I)

## Top 1 to Top 15 destinations by visitor arrivals



Arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2018; forecast for arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2019.

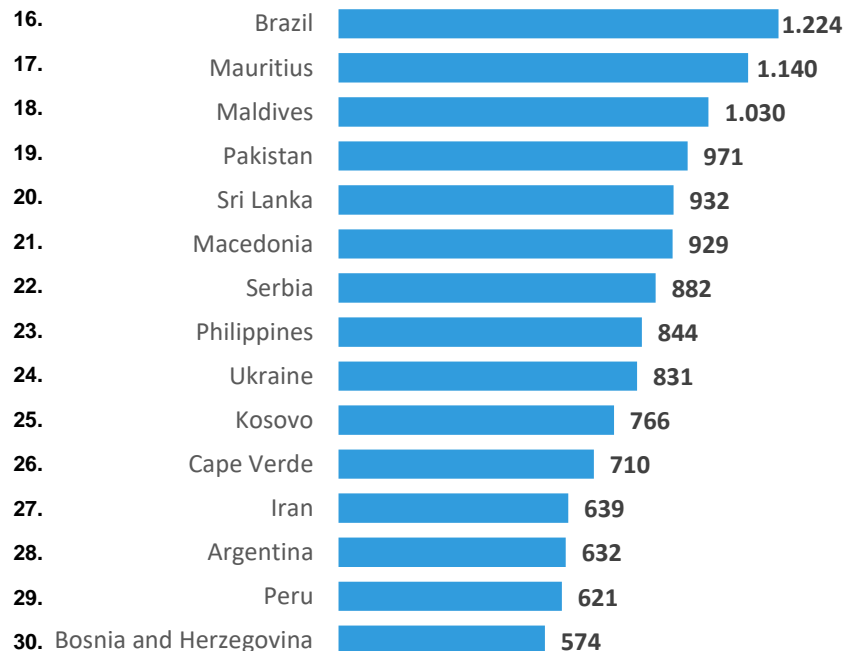
Visitors staying at least 1 night at destination

! Ranking based on total regular air transportation estimation; non-regular flights not included.

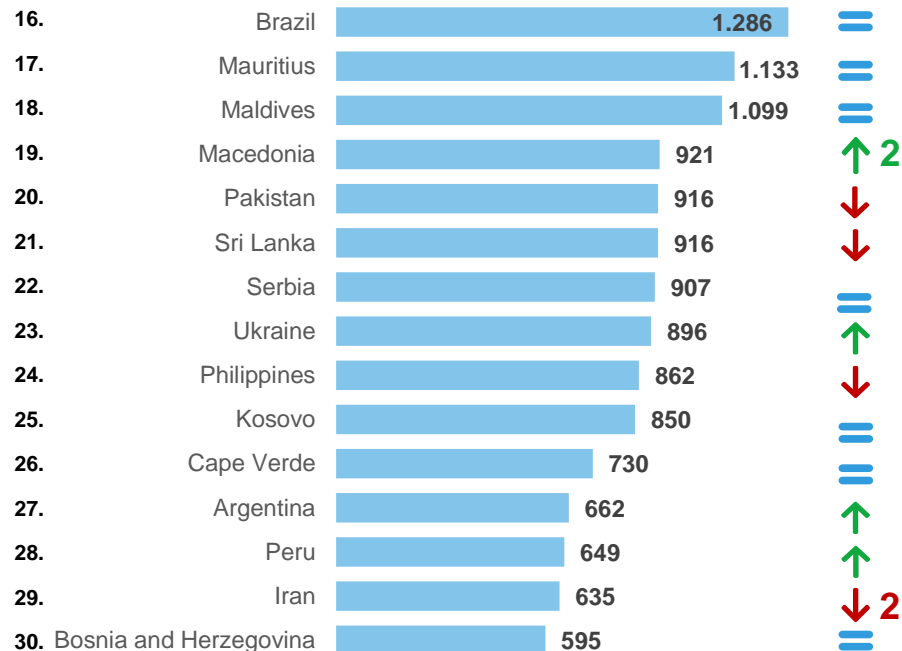
# OECD DAC countries: top 30 destinations for European travellers (II)

## Top 16 to Top 30 destinations by visitor arrivals

Arrivals in 2018 (thousands)



Forecast of arrivals in 2019 (thousands)



Arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2018; forecast for arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2019.

Visitors staying at least 1 night at destination

Ranking based on total regular air transportation estimation; non-regular flights not included



**Focus on top 10 destinations**



# Top 10 destinations for European travellers – DAC ODA recipients



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1



**Turkey**

17%

*Share of European arrivals (ODA recipients)*

2



**Morocco**

9%

3



**Thailand**

6%

4



**Egypt**

6%

5



**China**

5%

6



**India**

4%

*Share of European arrivals (ODA recipients)*

7



**South Africa**

3%

8



**Mexico**

2%

9



**Tunisia**

2%

10



**Cuba**

2%



Arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2018.



Visitors staying at least 1 night at destination



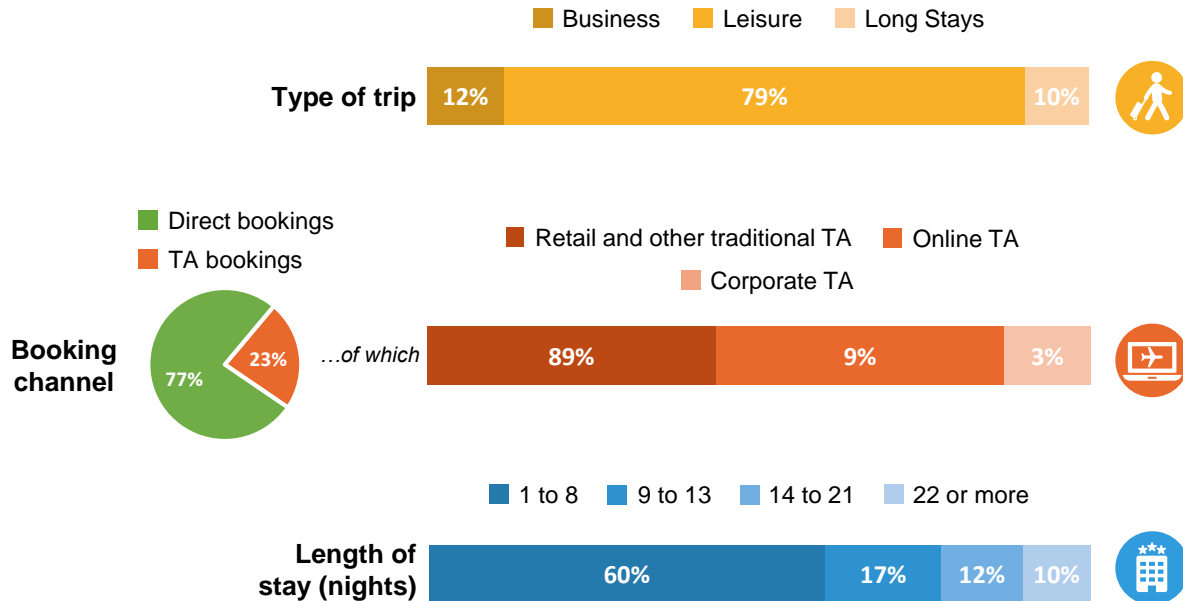
Ranking based on total regular air transportation estimation; non-regular flights not included.



## Top origin countries

	<i>Share</i>
Germany	43%
United Kingdom	11%
Cyprus	7%
France	5%
Switzerland	4%

## Traveller profile (shares)

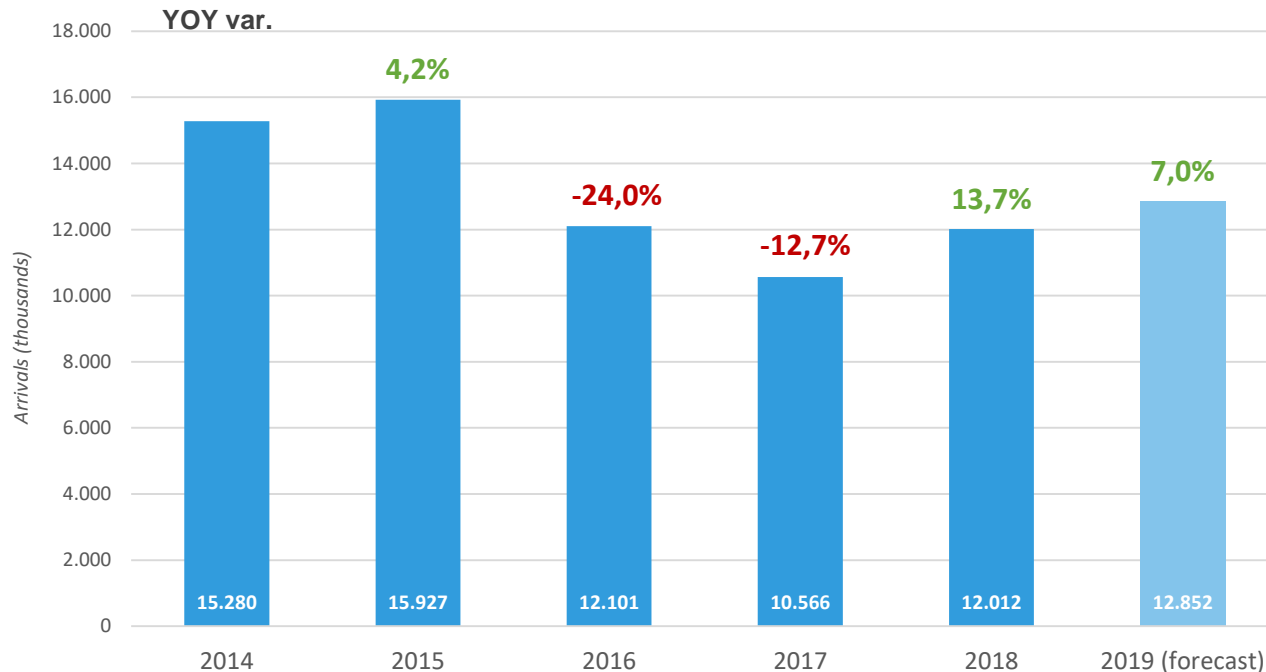




# 1. Turkey: Evolution of European visitor arrivals



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## European travellers share in 2018

17% of ODA recipients

27% of Upper Middle Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.

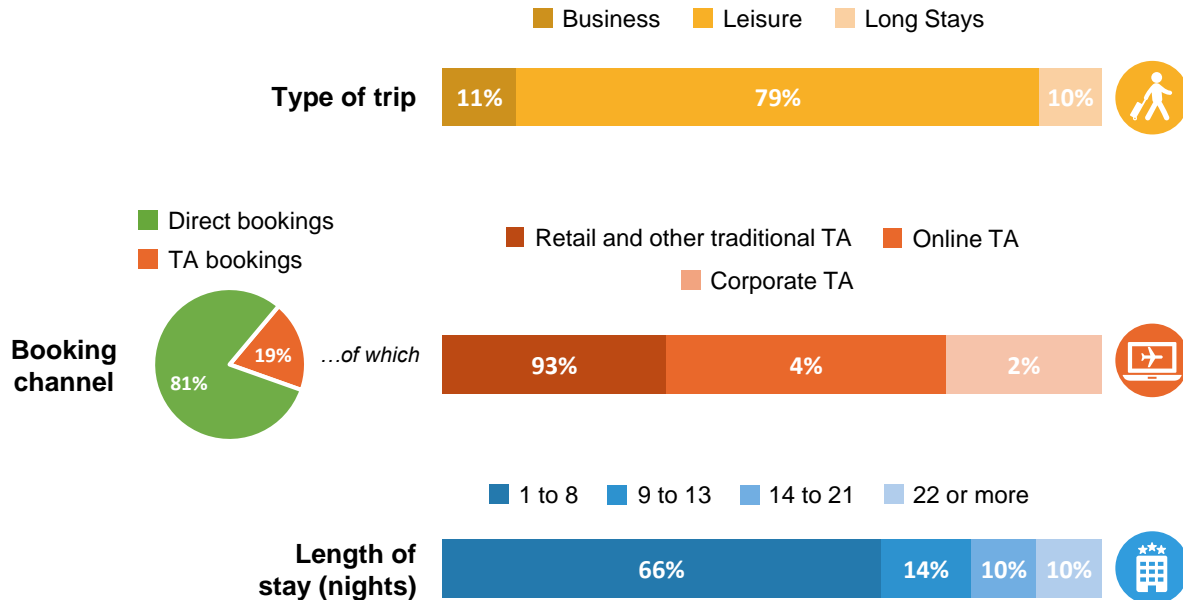


## 2. Morocco: Top source markets and traveller profile

### Top origin countries

	Share
France	41%
United Kingdom	11%
Germany	11%
Spain	10%
Italy	8%

### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



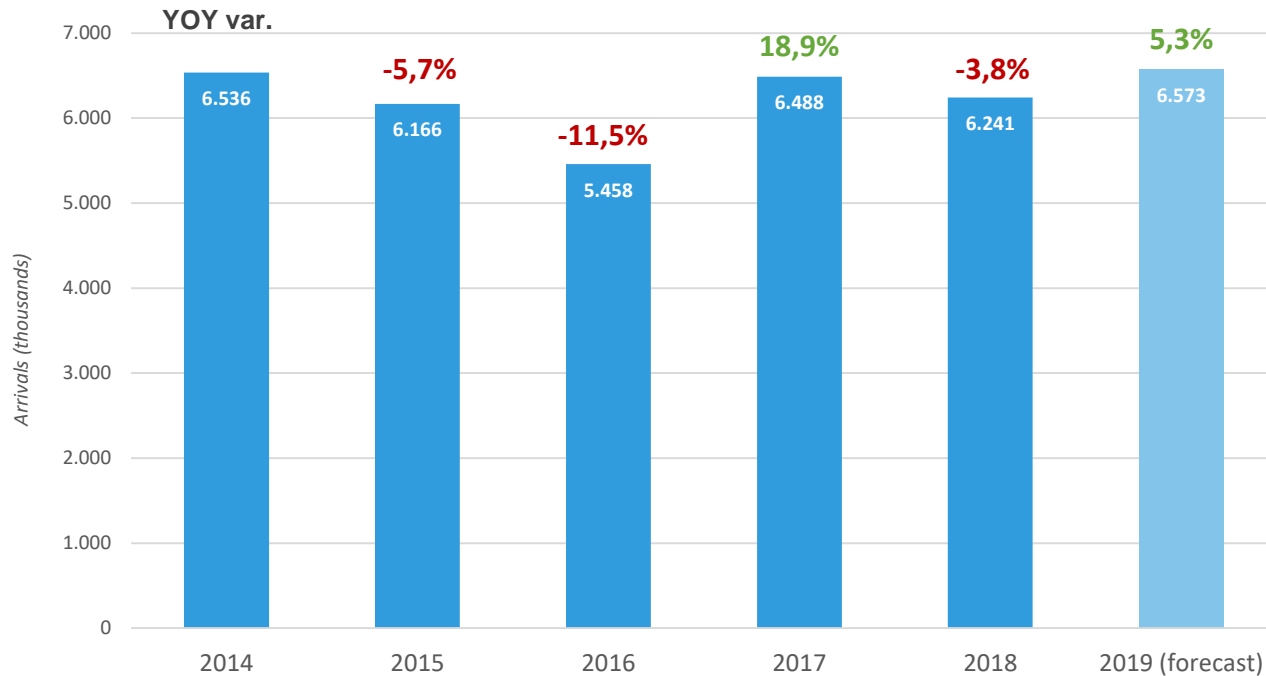
Visitors staying at least 1 night at destination.



## 2. Morocco: Evolution of European visitor arrivals



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### European travellers share in 2018

9% of ODA recipients

26% of Upper Middle Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.



### 3. Thailand: Top source markets and traveller profile



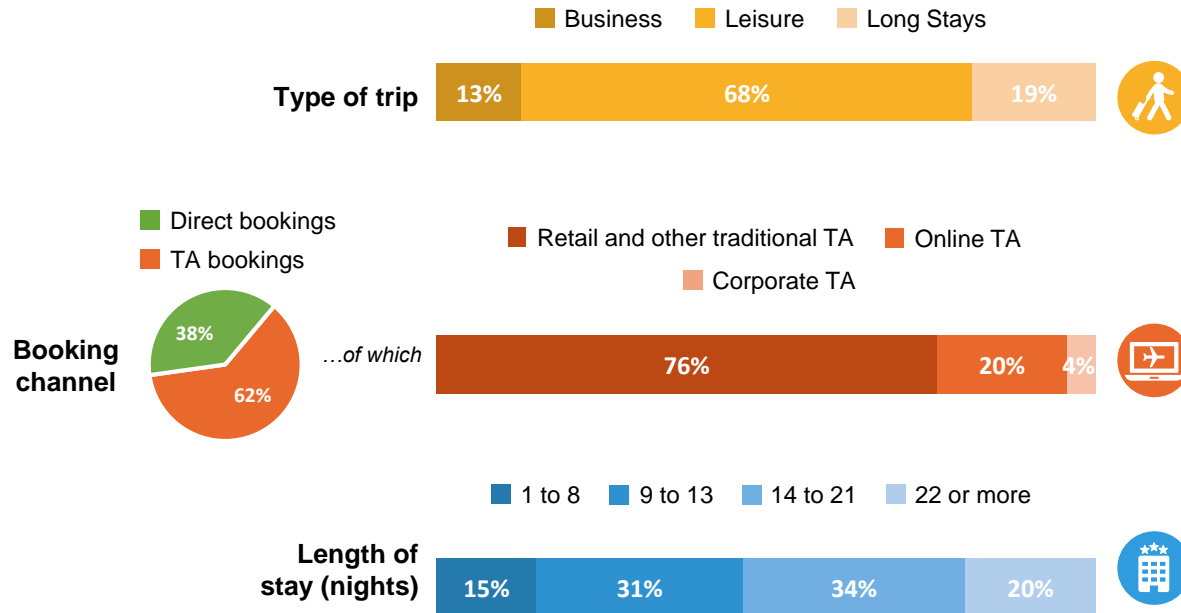
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#### Top origin countries

	Share
Germany	22%
United Kingdom	19%
France	11%
Switzerland	6%
Italy	6%

#### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



Visitors staying at least 1 night at destination.

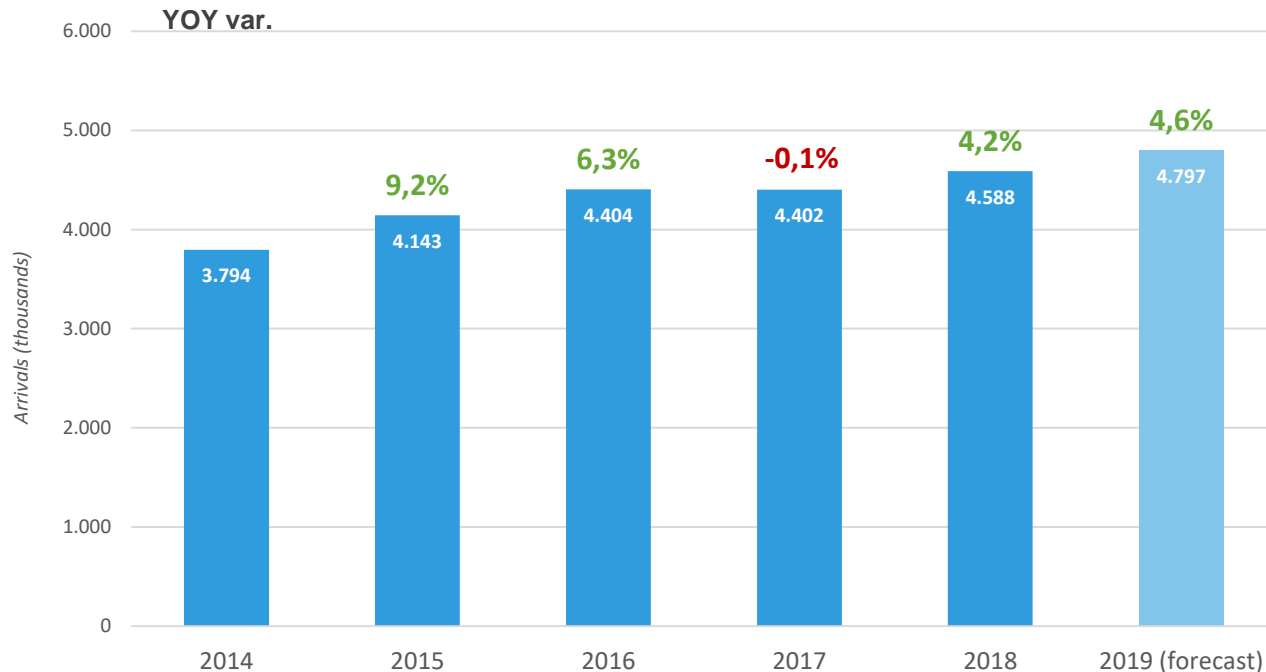




### 3. Thailand: Evolution of European visitor arrivals



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#### European travellers share in 2018

6% of ODA recipients

10% of Upper Middle Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.



## 4. Egypt: Top source markets and traveller profile



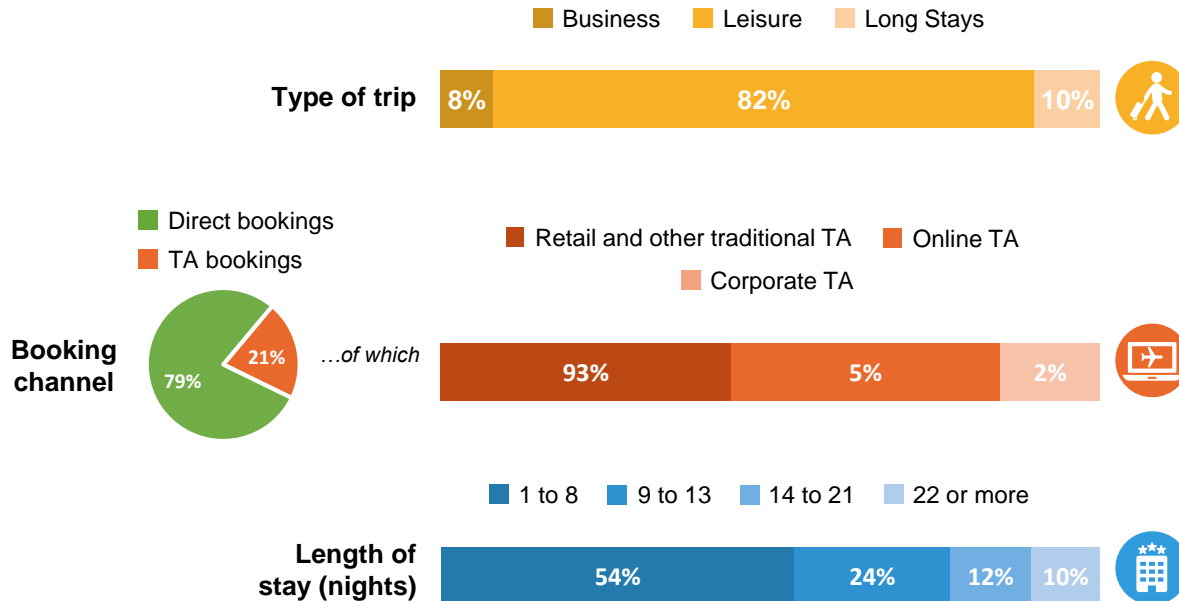
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### Top origin countries

	Share
Germany	39%
United Kingdom	14%
Italy	11%
Czech Republic	6%
Poland	4%

### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



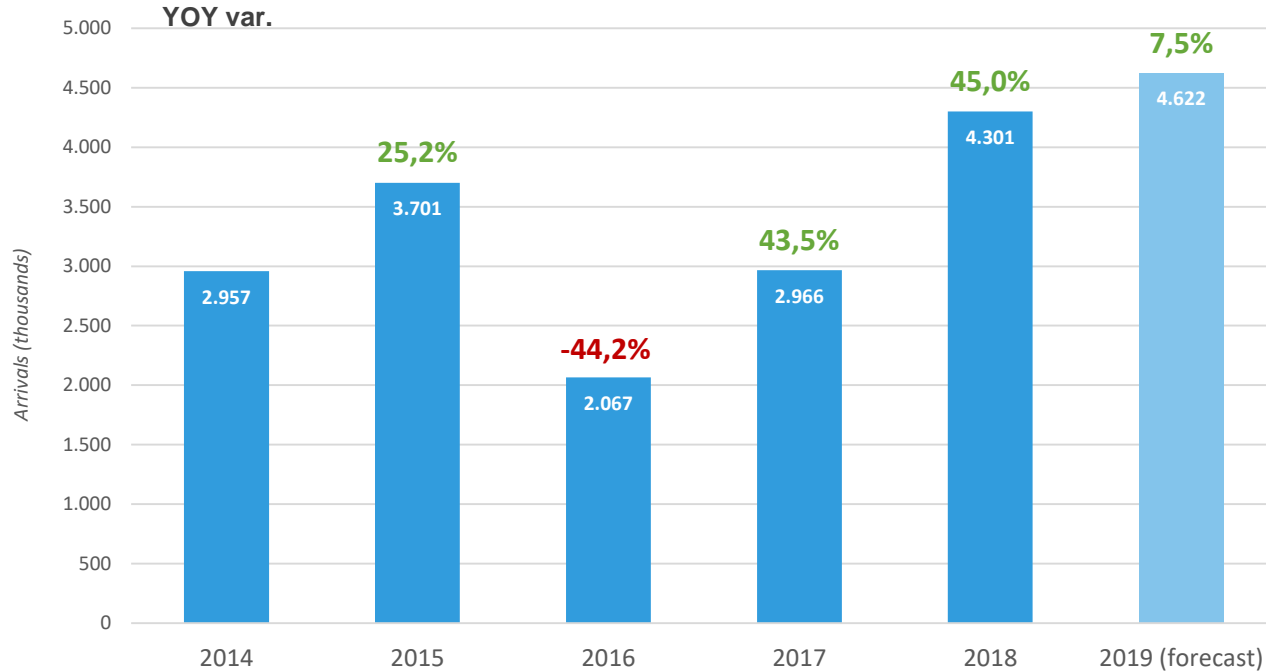
Visitors staying at least 1 night at destination.



## 4. Egypt: Evolution of European visitor arrivals



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### European travellers share in 2018

6% of ODA recipients

18% of Upper Middle Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.

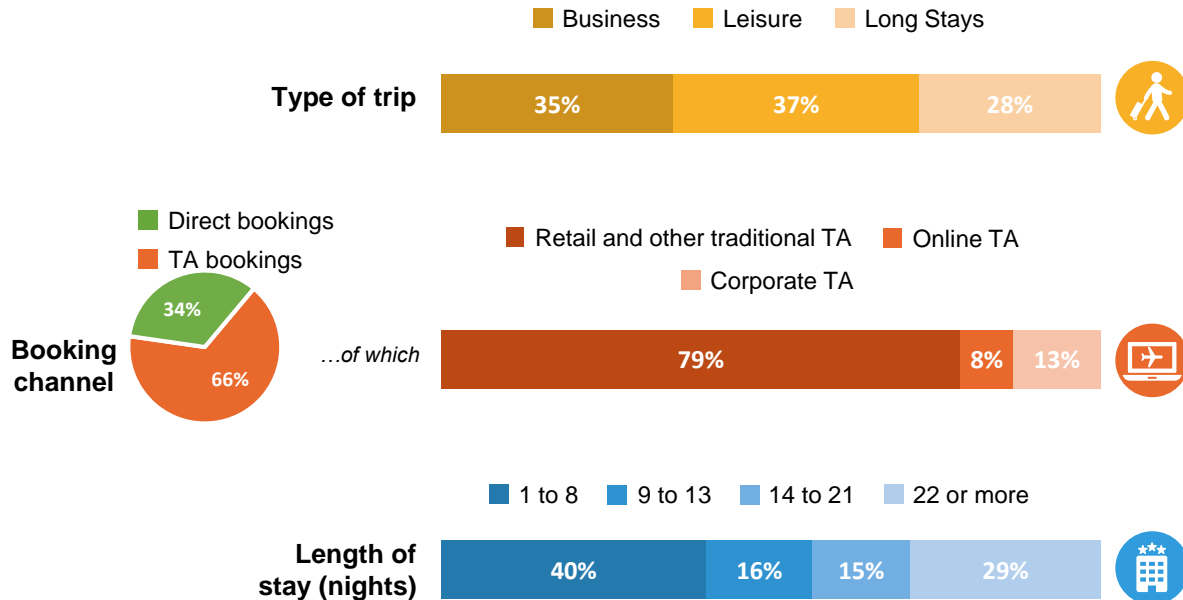


## 5. China: Top source markets and traveller profile

### Top origin countries

	Share
Germany	22%
United Kingdom	16%
Italy	15%
France	12%
Spain	8%

### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



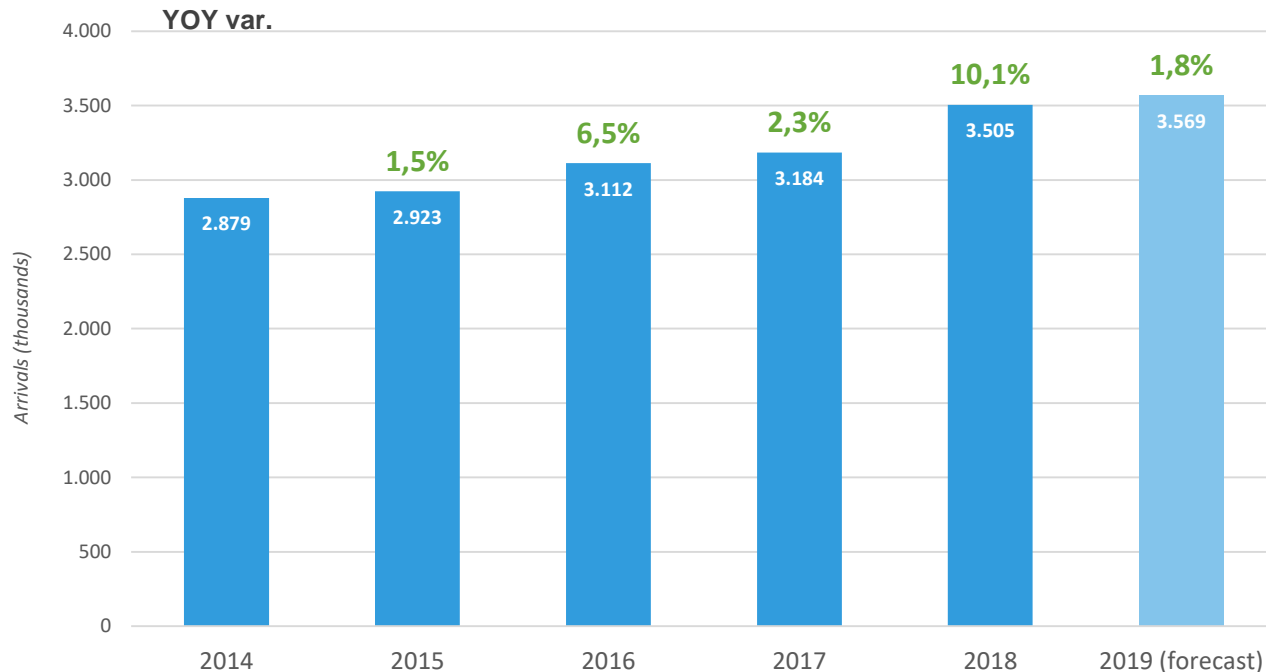
Visitors staying at least 1 night at destination.



## 5. China: Evolution of European visitor arrivals



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European travellers share  
in 2018

5% of ODA recipients

8% of Upper Middle  
Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.



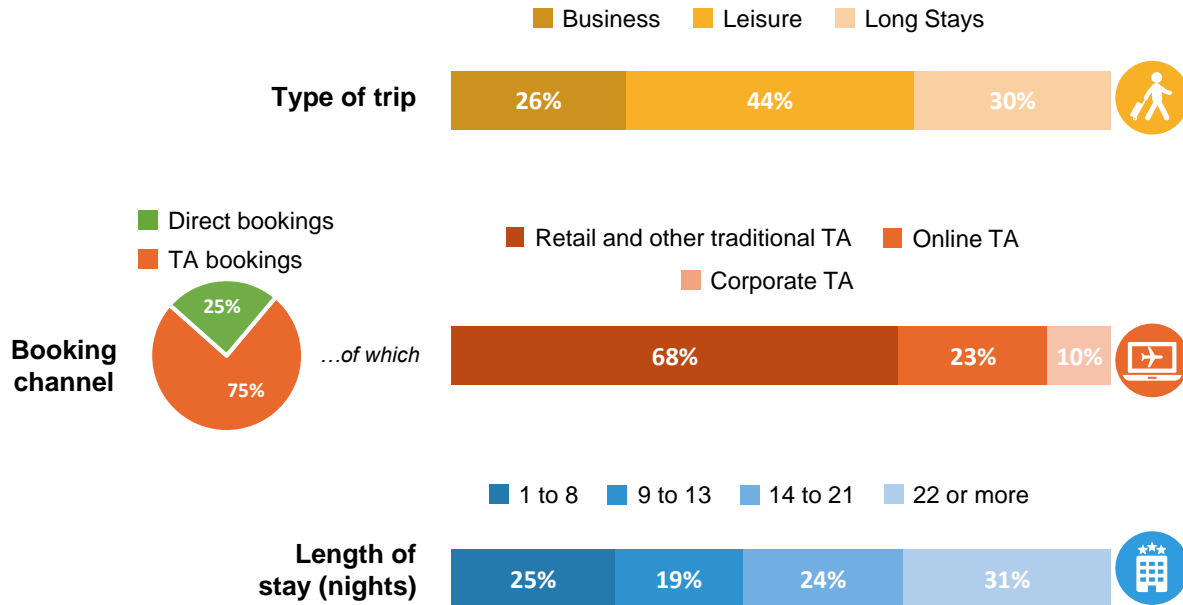


## 6. India: Top source markets and traveller profile

### Top origin countries

	Share
United Kingdom	47%
Germany	13%
France	9%
Italy	7%
Spain	4%

### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



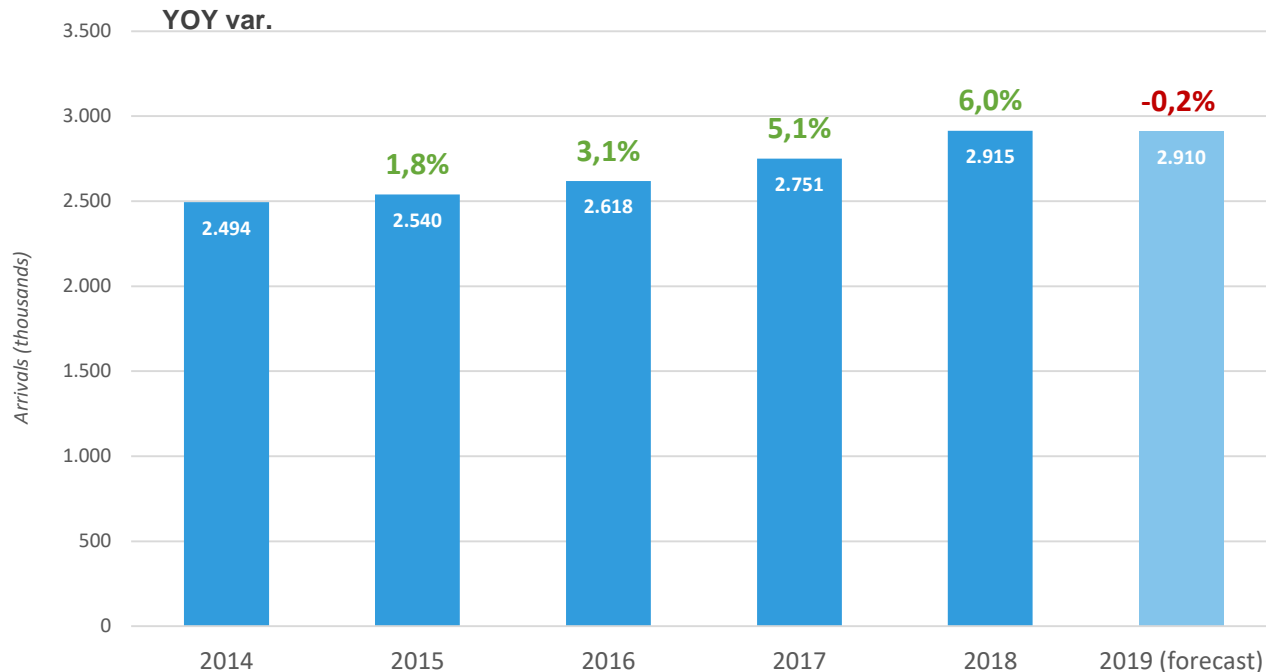
Visitors staying at least 1 night at destination.



## 6. India: Evolution of European visitor arrivals



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### European travellers share in 2018

4% of ODA recipients

12% of Upper Middle Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.



## 7. South Africa: Top source markets and traveller profile



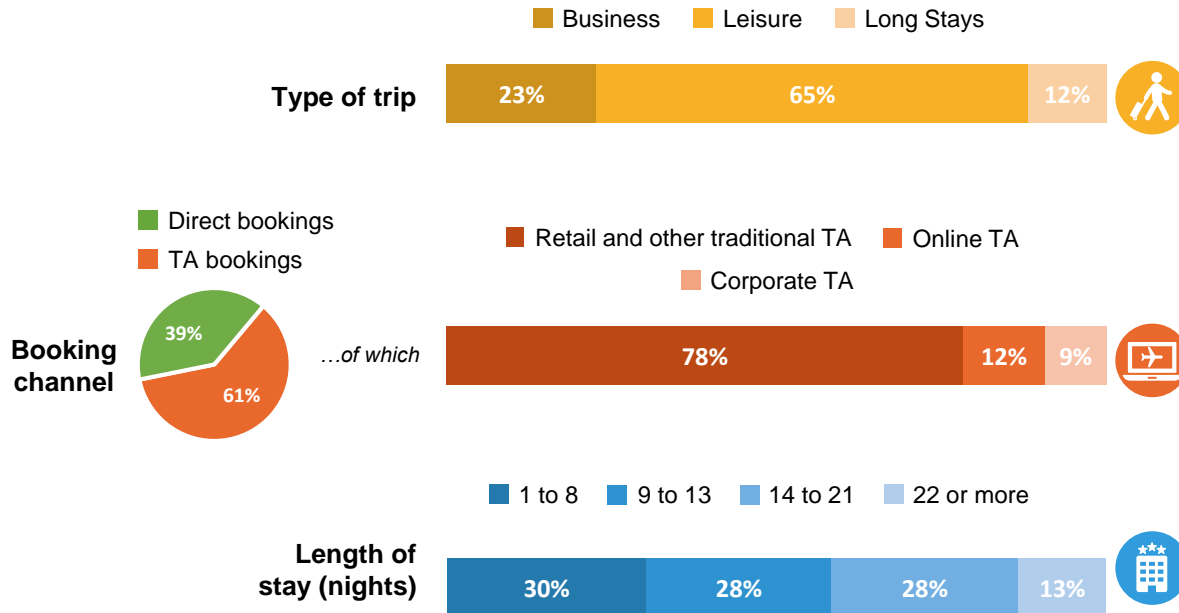
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### Top origin countries

	Share
United Kingdom	30%
Germany	23%
Netherlands	9%
France	9%
Switzerland	4%

### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



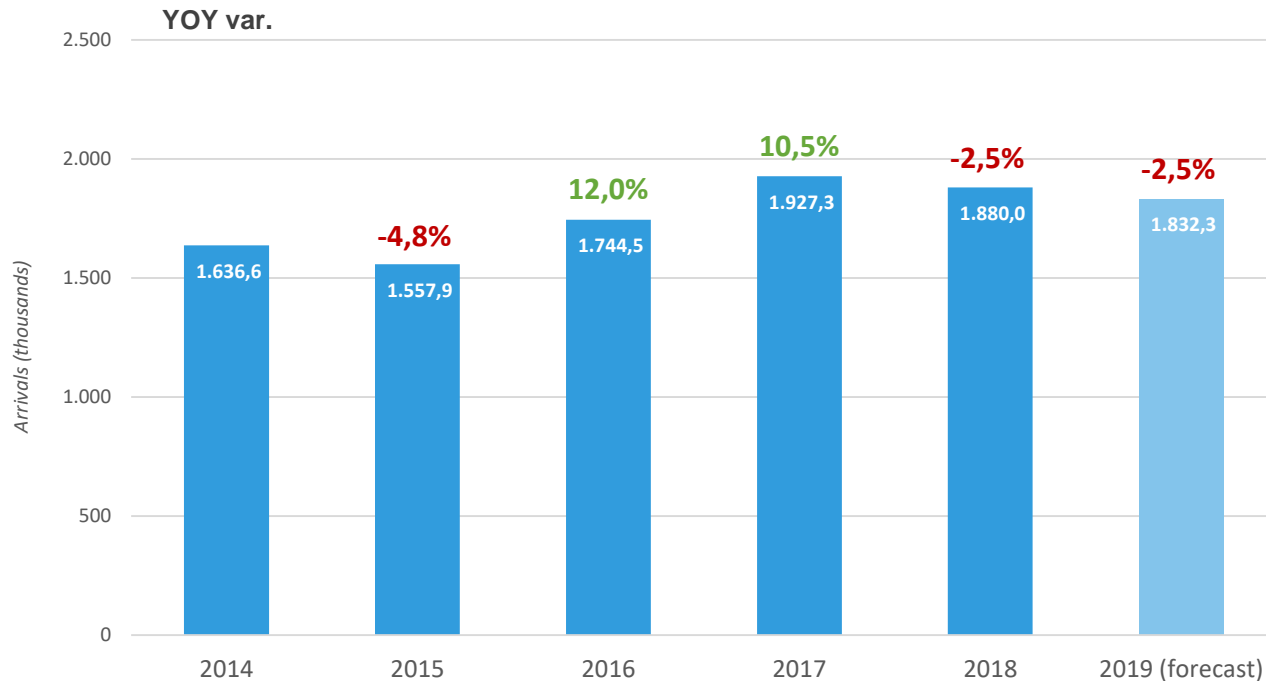
Visitors staying at least 1 night at destination.



## 7. South Africa: Evolution of European visitor arrivals



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### European travellers share in 2018

3% of ODA recipients

4% of Upper Middle Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.



## 8. Mexico: Top source markets and traveller profile



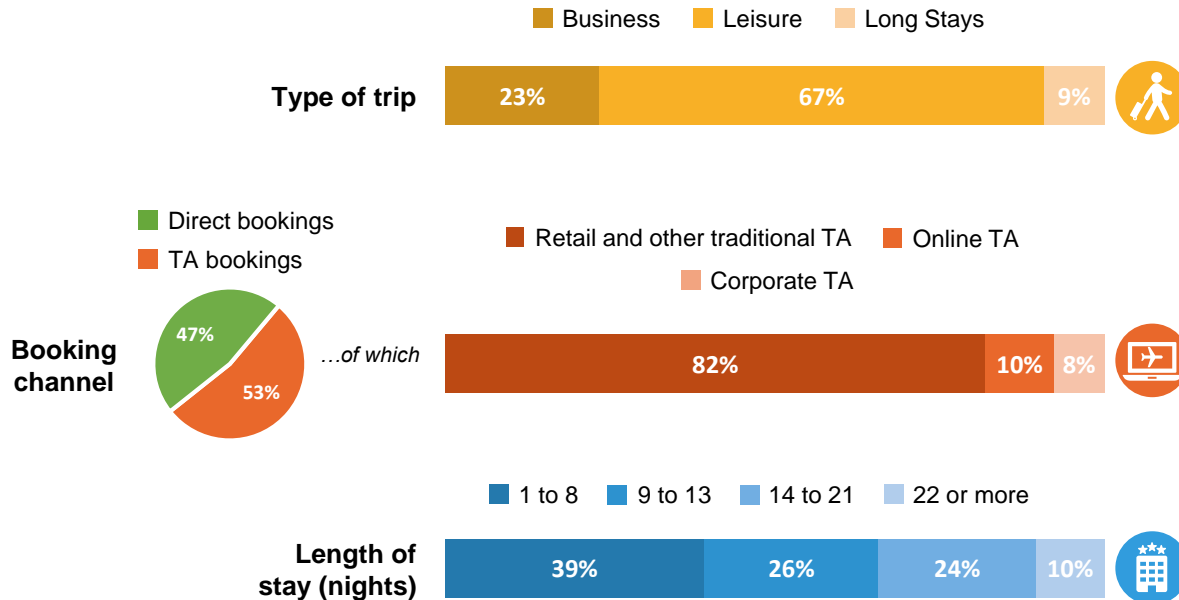
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### Top origin countries

	Share
United Kingdom	23%
Spain	18%
Germany	16%
France	14%
Italy	9%

### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



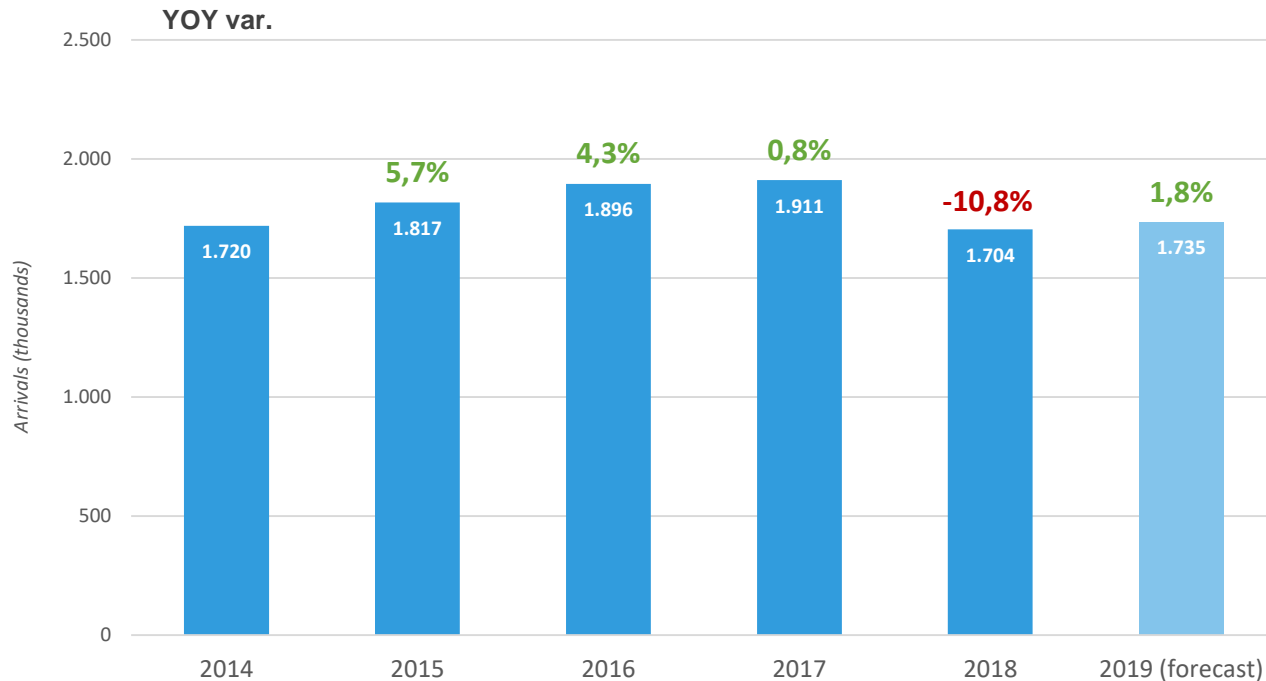
Visitors staying at least 1 night at destination.



## 8. Mexico: Evolution of European visitor arrivals



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European travellers share  
in 2018

2% of ODA recipients

4% of Upper Middle  
Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.

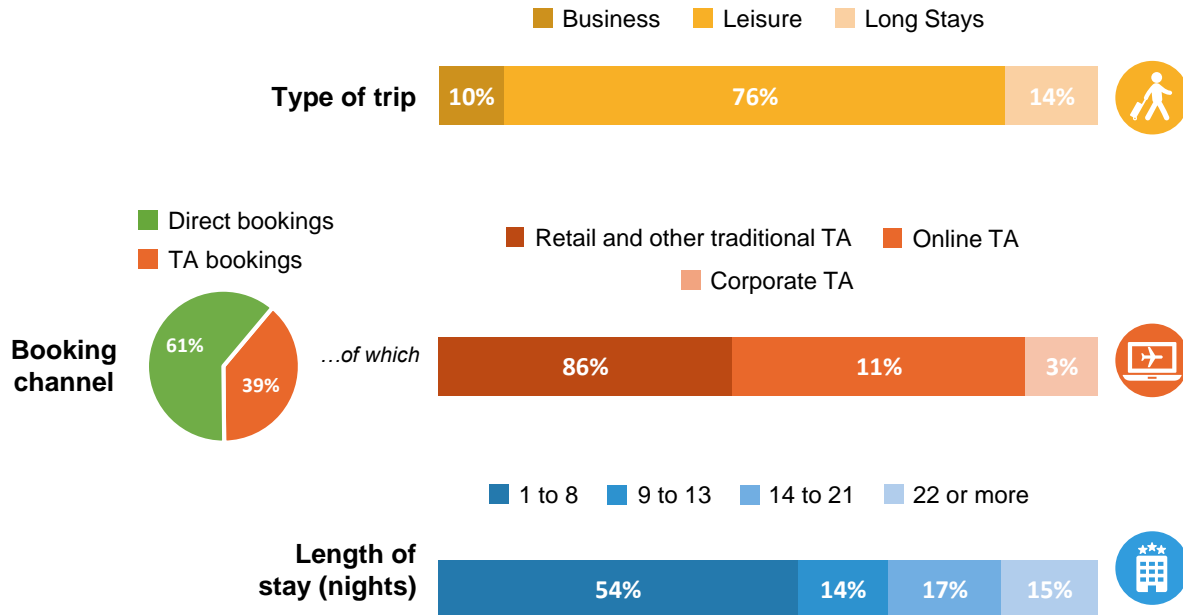


## 9. Tunisia: Top source markets and traveller profile

### Top origin countries

	Share
France	54%
Germany	16%
Italy	6%
Belgium	6%
United Kingdom	6%

### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



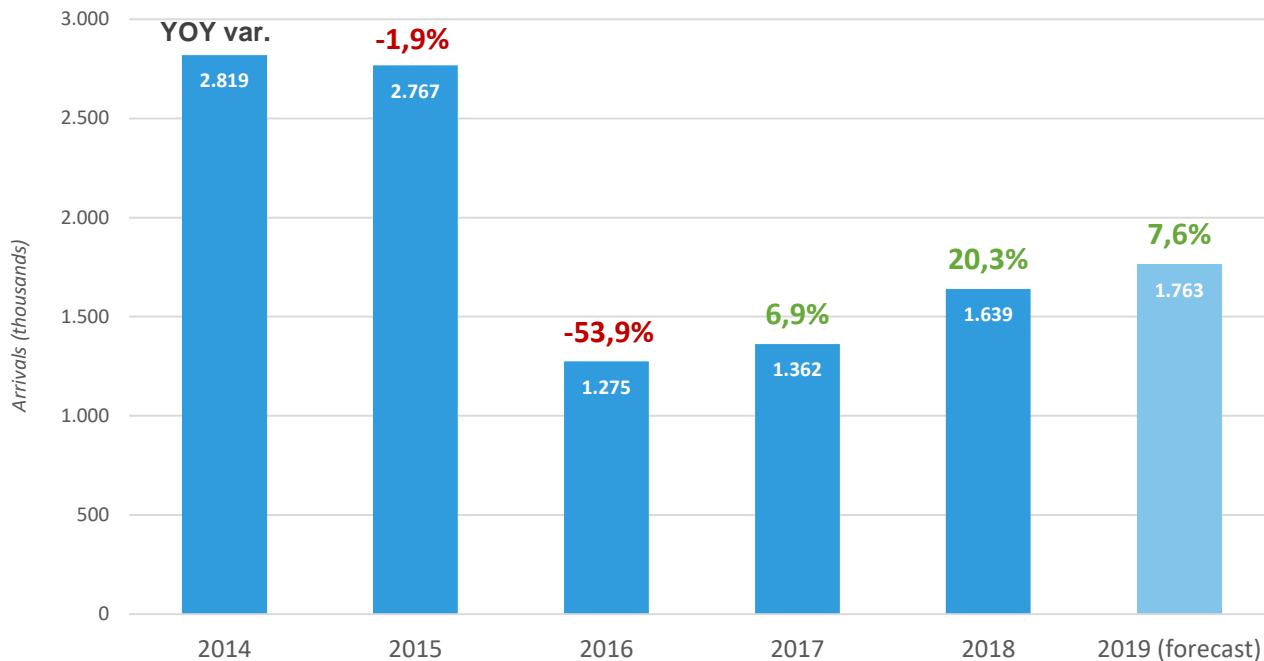
Visitors staying at least 1 night at destination.



## 9. Tunisia: Evolution of European visitor arrivals



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### European travellers share in 2018

2% of ODA recipients

4% of Upper Middle Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.





## 10. Cuba: Top source markets and traveller profile



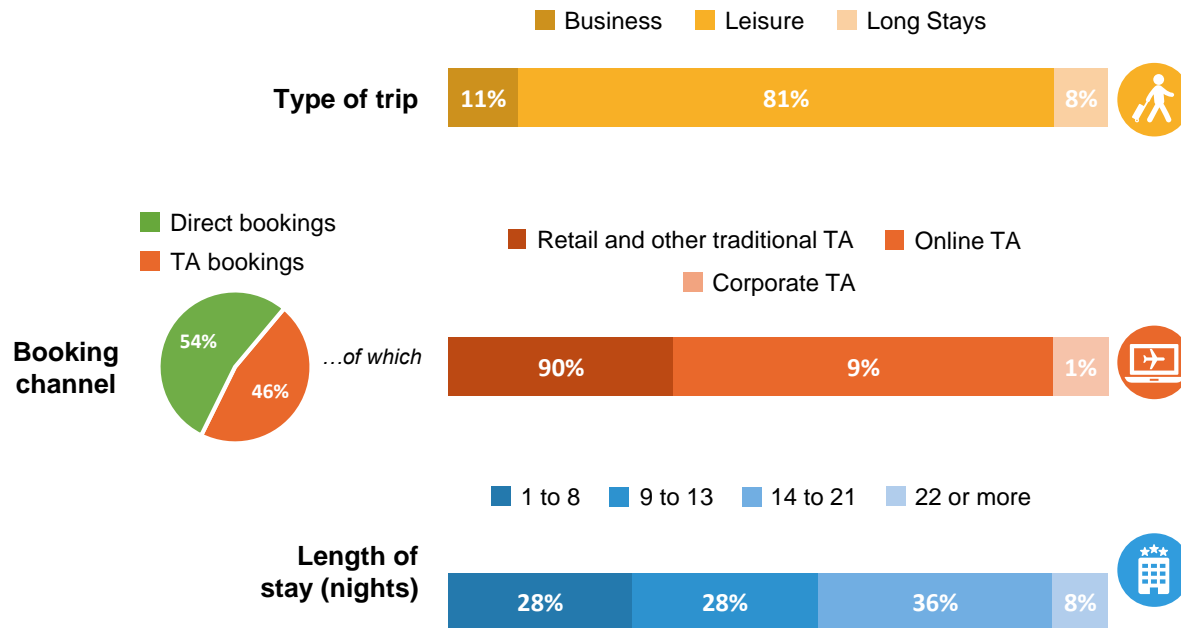
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### Top origin countries

	Share
Germany	18%
Spain	16%
Italy	15%
United Kingdom	15%
France	14%

### Traveller profile (shares)



Arrivals from European countries between 1<sup>st</sup> January and 31<sup>st</sup> December 2018.



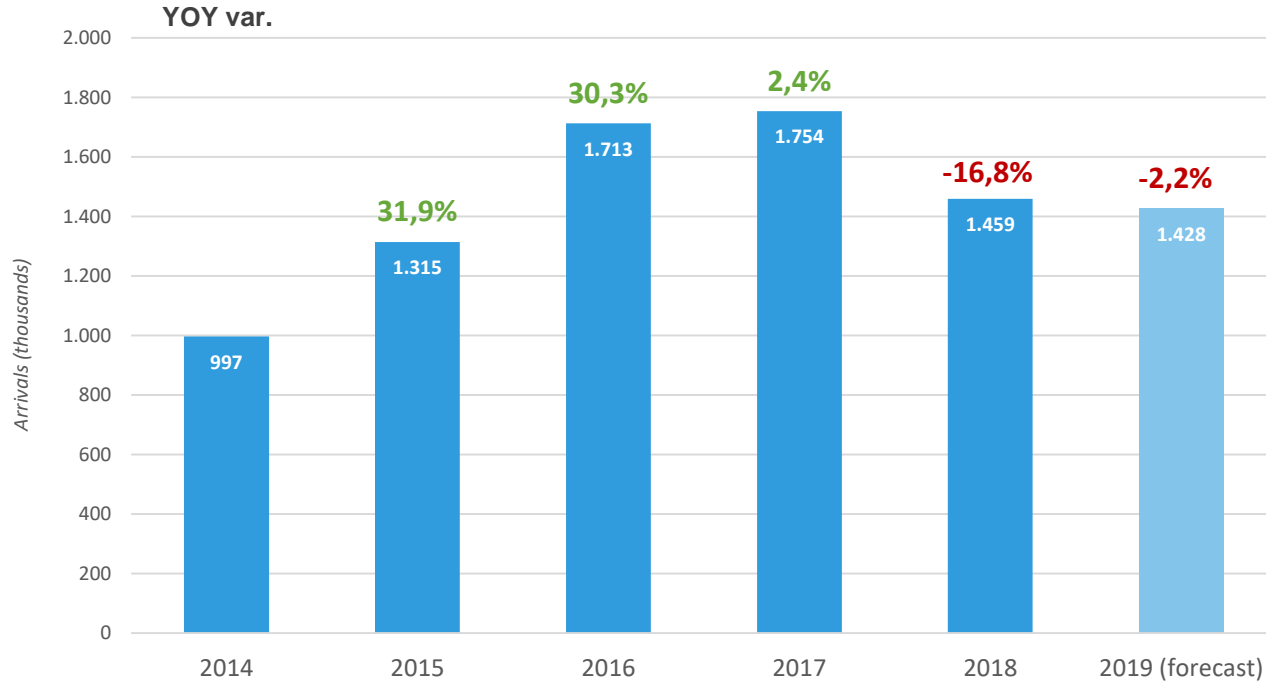
Visitors staying at least 1 night at destination.



## 10. Cuba: Evolution of European visitor arrivals



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European travellers share  
in 2018

2% of ODA recipients

3% of Upper Middle  
Income Countries



Arrivals from European countries from 2014 to 2018 (January to December) and 2019 forecast.



Visitors staying at least 1 night at destination.

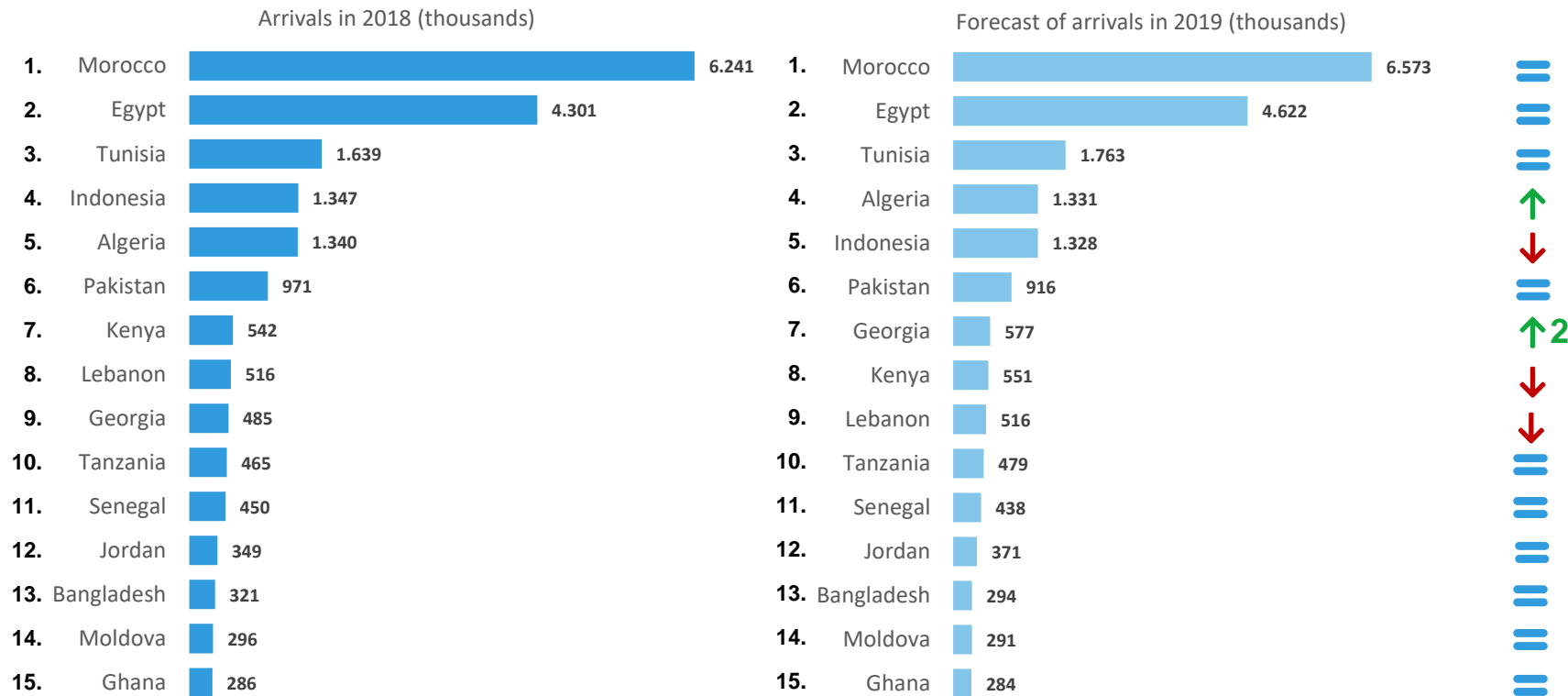


## CBI Priority Countries in 2018 and 2019



# CBI priority countries: Top 30 destinations for European travellers (I)

## Top 1 to Top 15 destinations by visitor arrivals



Arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2018; forecast for arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2019.

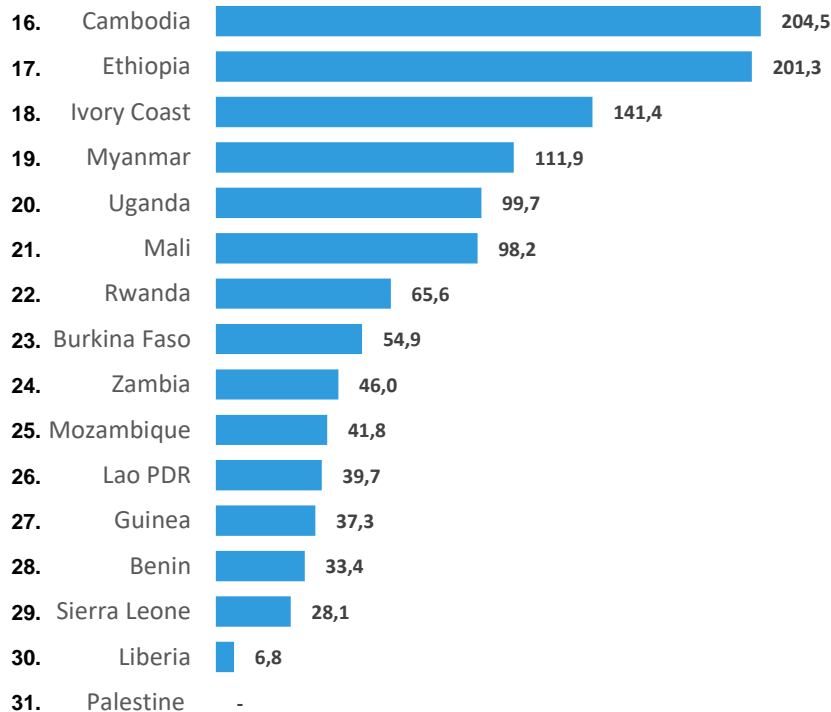
Visitors staying at least 1 night at destination

Ranking based on total regular air transportation estimation; non-regular flights not included.

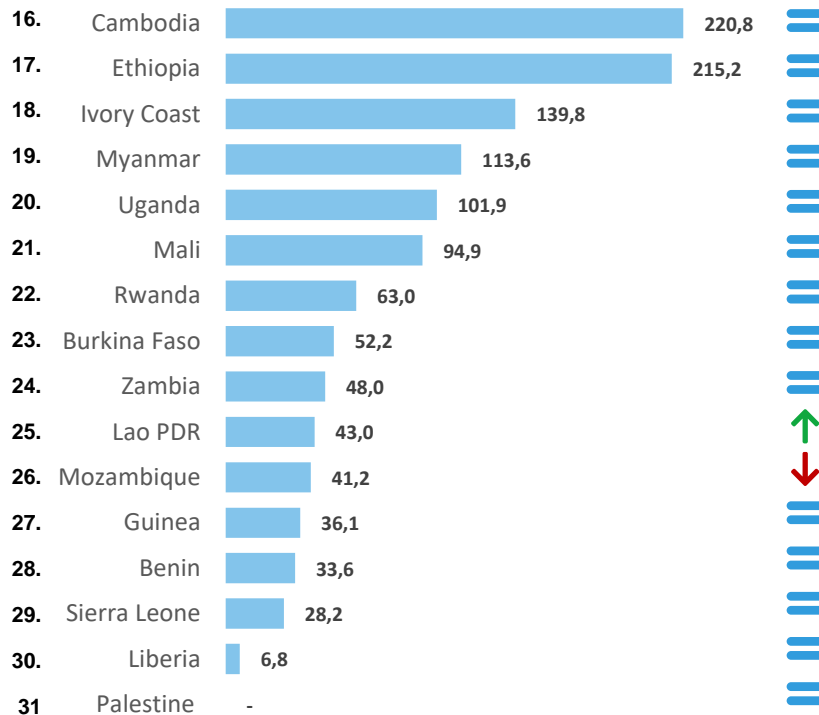
# CBI priority countries: Top 30 destinations for European travellers (II)

## Top 16 to Top 30 destinations by visitor arrivals (in thousands)

Arrivals in 2018 (thousands)



Forecast of arrivals in 2019 (thousands)



Arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2018; forecast for arrivals from 1<sup>st</sup> January to 31<sup>st</sup> December 2019.

Visitors staying at least 1 night at destination

Ranking based on total regular air transportation estimation; non-regular flights not included.