

EUROPEAN CITIES MARKETING BENCHMARKING REPORT 2016 - 2017 PRELIMINARY RESULTS

March 2017

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CITY TOURISM
STATISTICS

www.europeancitiesmarketing.com/ecm-benchmarking-report

Tourism in European Cities Continued to Grow by 3.6% in 2016 | 1/2

European Cities Marketing (ECM) announced a 3.6% growth in city tourism in 2016, with the domestic market increasing by 6.0% and the international market by 2.3% respectively. The top 10 cities in terms of bednights stayed the same as the previous year, with London, Paris and Berlin at the top of the list. Italy, Russia, and Japan continue to decrease as source markets, while the Chinese market reached a stable growth of 2.2% as of this year.

European Cities Marketing reported the preliminary results from the forthcoming European Cities Benchmarking Report with the findings that European cities continued their growth with a 3.6% increase in 2016 in total bednights compared to 2015. For the first time in recent years, domestic bednights (6.0%) grew more than international bednights (2.3%). The preliminary data feature results from 62 out of 121 cities, representing a total of 389.9 million bednights.

Top Performing Cities

The top performing cities in terms of total number of bednights did not change in comparison to the previous year, except that Amsterdam replaced Stockholm in the top 10 list. London had the highest number of bednights in 2016 with a 7.3% increase, followed by Paris (-9.5%), Berlin (+2.7%), and Rome (+1.9%). Barcelona (+8.5%), Amsterdam (+6.6%) and Madrid (+6.4%) had the highest growth rates (excluding London).

For international bednights the list of the cities is the same, however the rankings differ. London (+1.3%) and Paris (-12.9%) are the top two cities with the highest number of international bednights. The decrease in growth in Paris can be seen both in total and international bednights, which shows that although the numbers are decreasing, Paris is still one of the main city destinations in Europe. The Spanish cities of Barcelona (+7.5%) and Madrid (+9.4%) had the highest growth in the top 10 list.

Tourism in European Cities Continued to Grow by 3.6% in 2016 | 2/2

Fluctuat Nec Mergitur

Ignasi de Delàs, ECM President, explains: *“We saw another exceptionally successful year for city tourism in Europe, despite major challenges arising. The terrorist attacks in Europe, and particularly in Paris, show the volatility, importance and resilience of tourism. Overseas markets such as China or Japan are particularly sensitive towards perceived risk which resulted in negative performance in 2016. However, since the last quarter of 2016 city tourism in Europe is back on track: Visitor numbers are strongly and steadily recovering for Paris as well as for source markets which were decreasing for years, such as Russia. City tourism in Europe in 2016 was “tossed by the waves but does not sink”, as European Cities remain the most attractive tourism destinations for visitors from all over the world and showed resilience and courage against terrorism.”*

Main Source Market Developments

Main source markets USA (11%), Germany (9%), and UK (9%) make up approximately 30% of the source markets for European cities. The Chinese market, which was the fastest growing market in Europe, continued its growth with +2.2% in 2016. Italy (-4.3%), Japan (-11.8%), and Russia (-12.4%) continued their decrease, which makes up 9% of the total foreign market in European cities.

Moreover, the results indicate that overall European city tourism is growing; however, this time the growth is coming from European markets rather than BRIC markets.

The 13th edition of the European Cities Marketing Benchmarking Report will be available as of June 2017, representing the leading source of European city tourism statistics in the world.

The report can be pre-ordered at a discount rate of -20% until the end of April.

The ECM Cities Benchmarking Report

Preliminary Results 2016

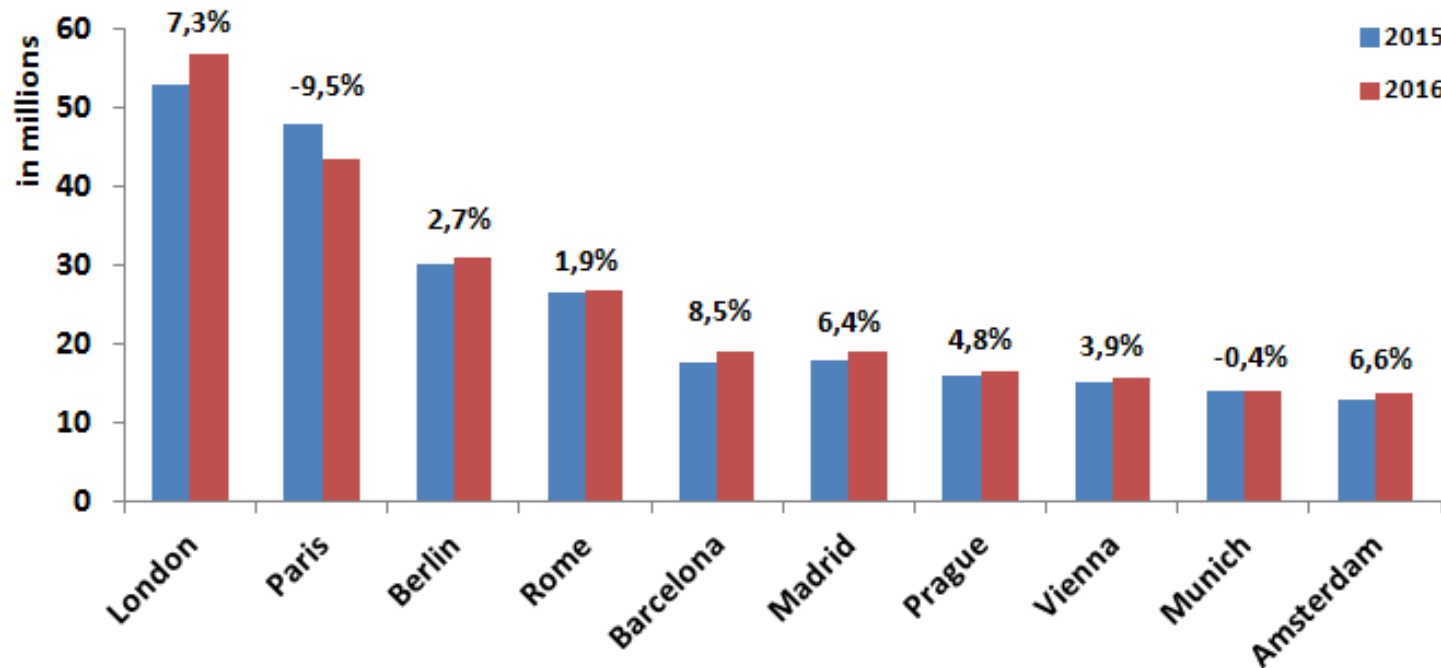
City	Bednights	Forecast 16	City	Bednights	Forecast 16	City	Bednights	Forecast 16
Aachen	NA	Nov-Dec	Graz	NA		Paris	NGS	Dec
Aalborg	NG		Hamburg	NA	Dec	Poznan	NG	Nov-Dec
Aarhus	NG		Heidelberg	NA	Dec	Prague	NA	
Amsterdam	NG	Oct-Dec	Innsbruck	NA		Reims	NG	Dec
Barcelona	NG		Klagenfurt	NA		Rome	NG	
Bergen	NG	Sep-Dec	Linz	NA		Salzburg (city)	NA	
Berlin	NA	Dec	Lisbon	NG	Nov-Dec	San Sebastian	NG	
Bordeaux	NGS	Dec	Ljubljana	NA	Dec	Saragossa	NG	
Bratislava	NA	Oct-Dec	London	NAS	Oct-Dec	Split	NA	Apr-Dec
Bregenz	NA		Lucerne	NG	Dec	St. Pölten	NA	
Brussels	NA	Oct-Dec	Luxembourg	NG	Dec	Stockholm	NAS	
Budapest	NA	Sep-Dec	Madeira	NGS	Sep-Dec	Tallinn	NA	
Copenhagen	NAS		Madrid	NG	Apr-Dec	Tampere	NA	
Darmstadt	NG		Malmö	NG		The Hague	NG	Nov-Dec
Dijon	NG	Nov-Dec	Maribor	NA	Nov-Dec	Turku	NA	
Dresden	NA	Dec	Munich	NG	Dec	Uppsala	NAS	Nov-Dec
Dubrovnik	NA	Aug-Dec	Nicosia	NGS	Oct-Dec	Valencia	NA	
Eisenstadt	NA		Novi Sad	NG		Vienna	NAS	Dec
Espoo	NA		Nürnberg	NA	Nov-Dec	Vilnius	NG	Oct-Dec
Genua	NG	Dec	Opatija	NAS		Zagreb	NA	
Gijón	NG	Dec	Oslo	NG				

Notes:

Sample size: 62 European cities

NA = in all accommodation establishments; NG = in hotels and similar establishments; NAS = in all accommodation establishments in greater city area; NGS = in hotels and similar establishments in greater city area.

Top 10 European Cities Total Number of Bednights



Notes:

Bednights in all paid forms of accommodation establishments: Berlin, London, Prague, and Vienna.

Bednights in hotels and similar establishments: Amsterdam, Barcelona, Madrid, Munich, Paris, and Rome.

Data covers city area only, except for London, Paris, and Vienna (greater area). London excl. VFR (predicted).

Data includes forecasts for: Amsterdam (X-XII/2016), London (X-XII/2016), Madrid (IV-XII/2016); Berlin, Munich, Paris, and Vienna (all XII/2016).

Top 10 European Cities

Total Number of Bednights

	2015	2016	in %
London	52,9	56,8	7,3%
Paris	48,0	43,4	-9,5%
Berlin	30,3	31,1	2,7%
Rome	26,4	26,9	1,9%
Barcelona	17,7	19,2	8,5%
Madrid	18,0	19,1	6,4%
Prague	15,9	16,7	4,8%
Vienna	15,1	15,7	3,9%
Munich	14,1	14,0	-0,4%
Amsterdam	12,9	13,7	6,6%

Notes:

Bednights in all paid forms of accommodation establishments: Berlin, London, Prague, and Vienna.

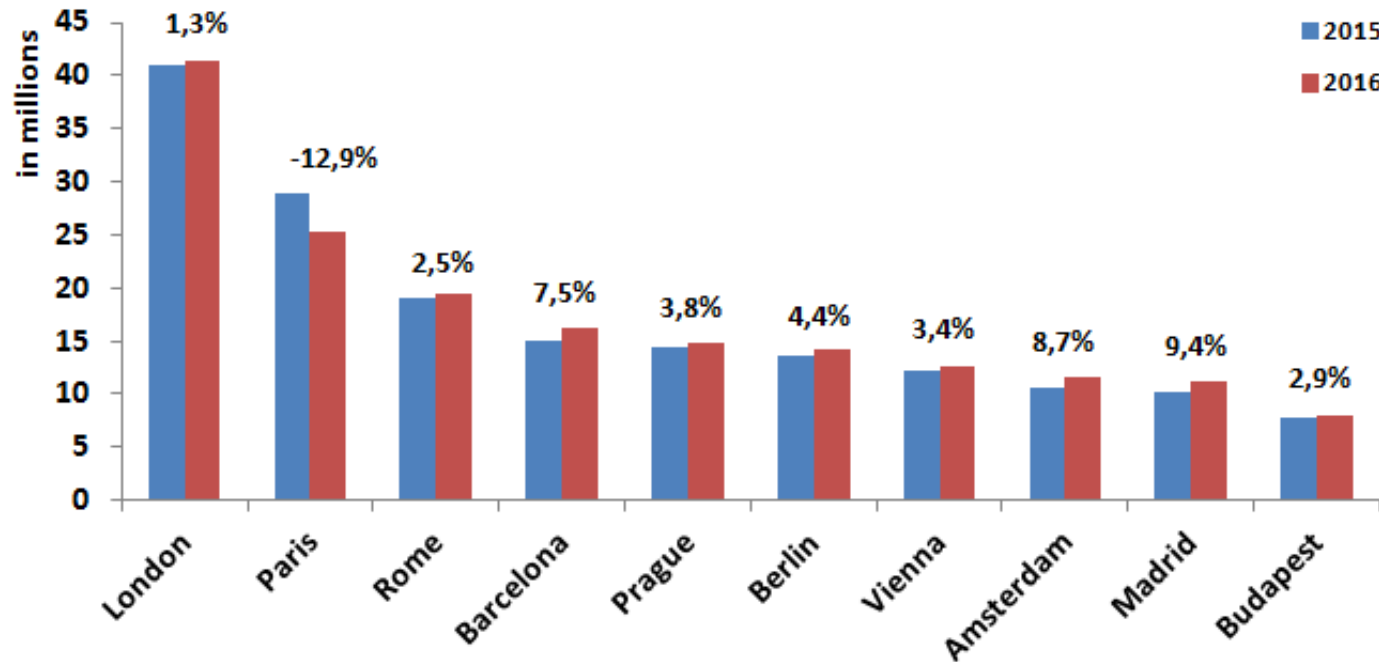
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Top 10 European Cities

Total Number of Bednights by International Tourists



Notes:

Bednights in all paid forms of accommodation establishments: Berlin, Budapest, London, Prague, and Vienna.

Bednights in hotels and similar establishments: Amsterdam, Barcelona, Madrid, Paris, and Rome.

Data covers city area only, except for London, Paris, and Vienna (greater area). London excl. VFR (predicted).

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Top 10 European Cities

Total Number of Bednights by International Tourists

	2015	2016	in %
London	40,9	41,4	1,3%
Paris	29,0	25,3	-12,9%
Rome	19,0	19,5	2,5%
Barcelona	15,0	16,2	7,5%
Prague	14,3	14,9	3,8%
Berlin	13,6	14,2	4,4%
Vienna	12,2	12,7	3,4%
Amsterdam	10,7	11,6	8,7%
Madrid	10,2	11,2	9,4%
Budapest	7,8	8,0	2,9%

Notes:

Bednights in all paid forms of accommodation establishments: Berlin, Budapest, London, Prague, and Vienna.

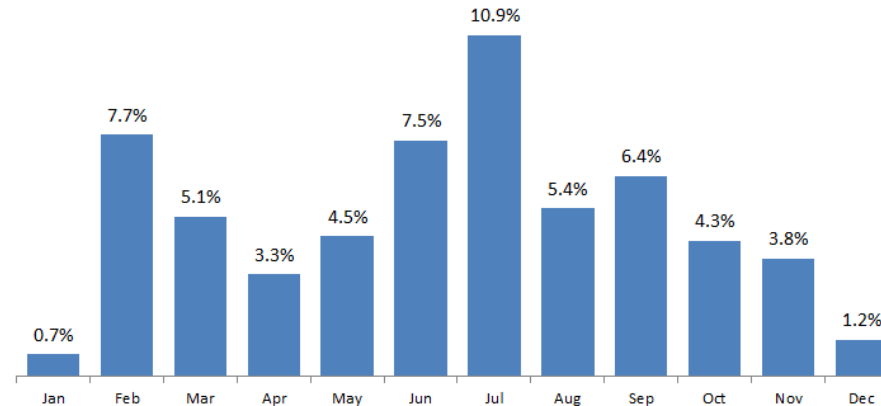
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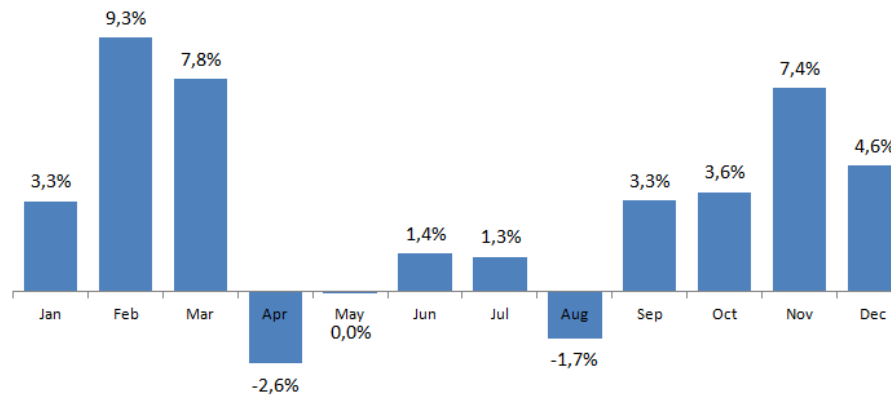
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Monthly Development in 2016

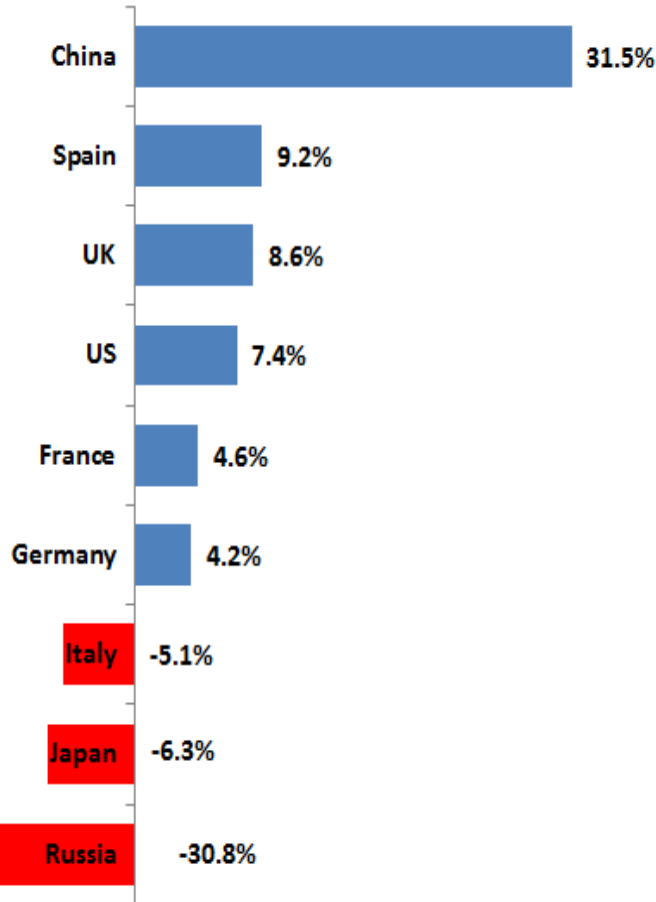
European Cities 2015 - Total International Bednights
(relative change rate compared to 2014)



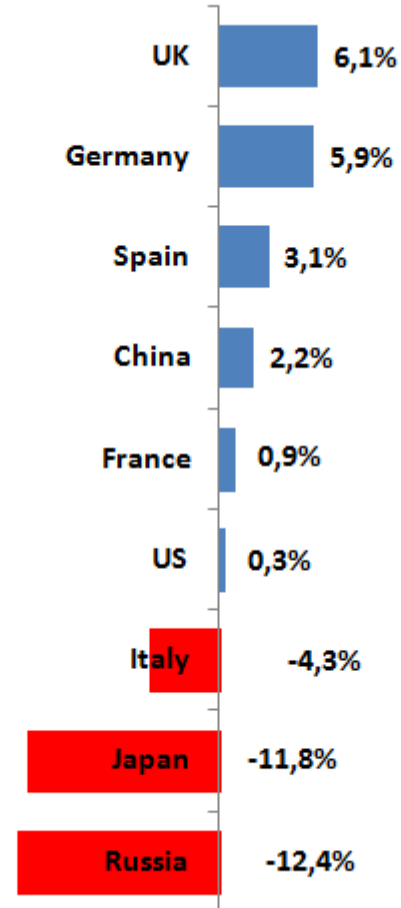
European Cities 2016 - Total International Bednights
(relative change rate compared to 2015)



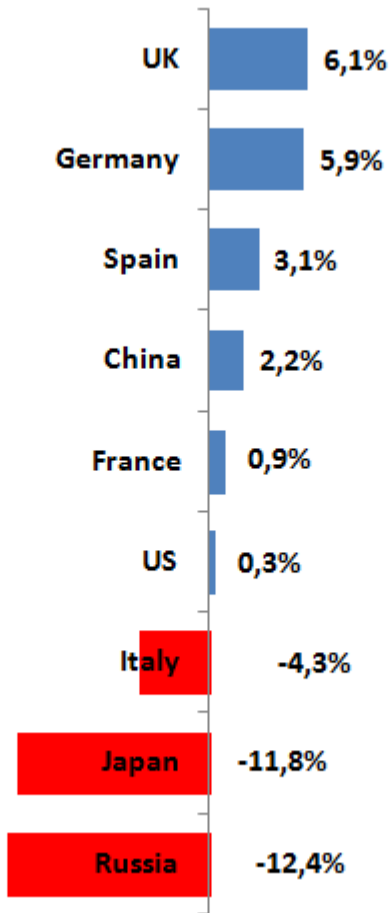
Main Source Market Performance 2014-2015



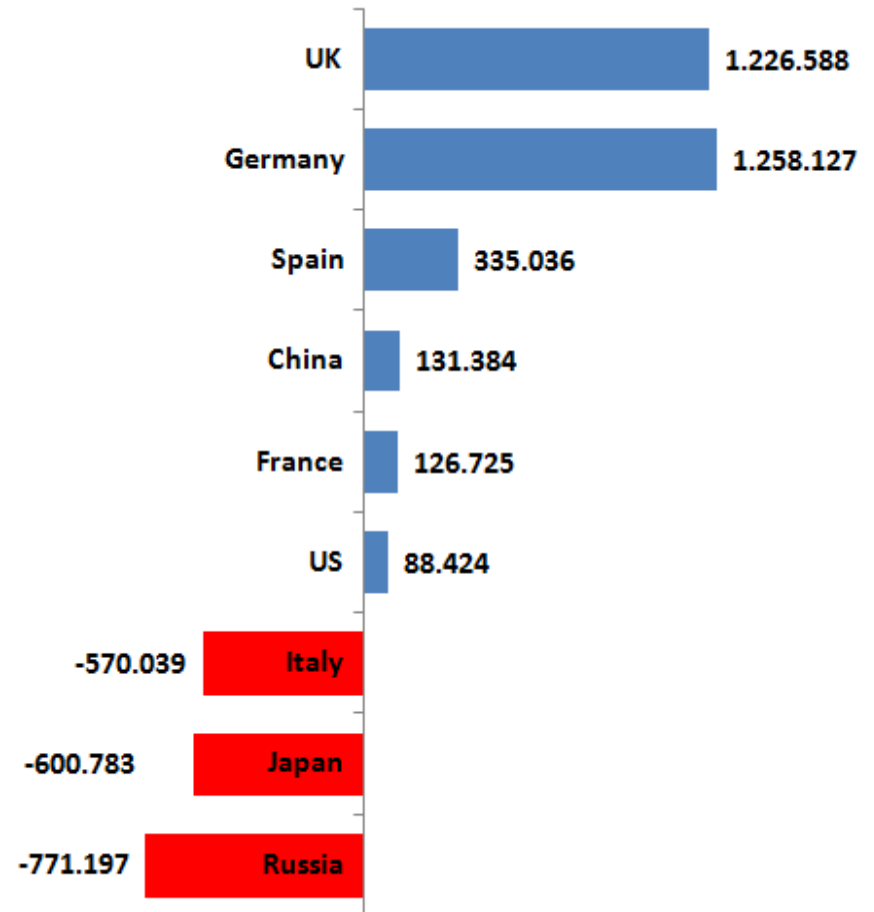
Main Source Market Performance 2015-2016



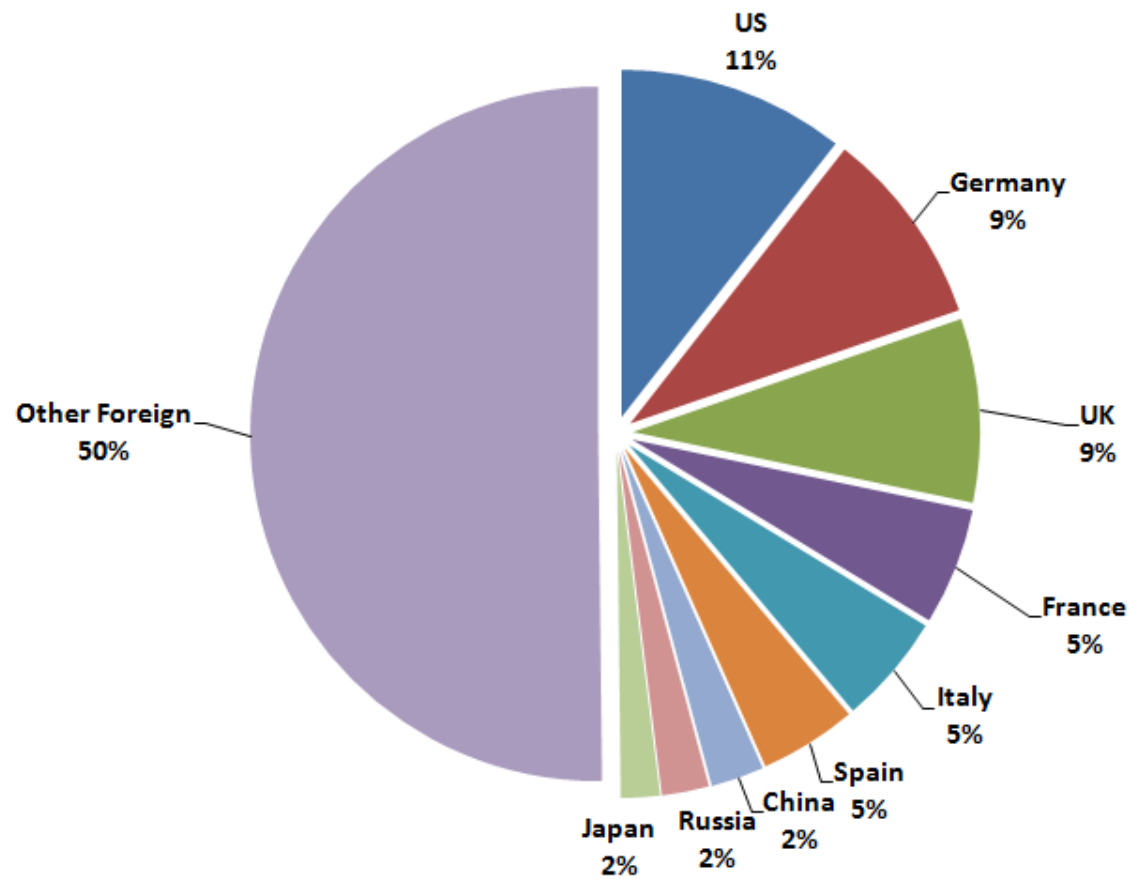
Main Source Market Performance 2015-2016



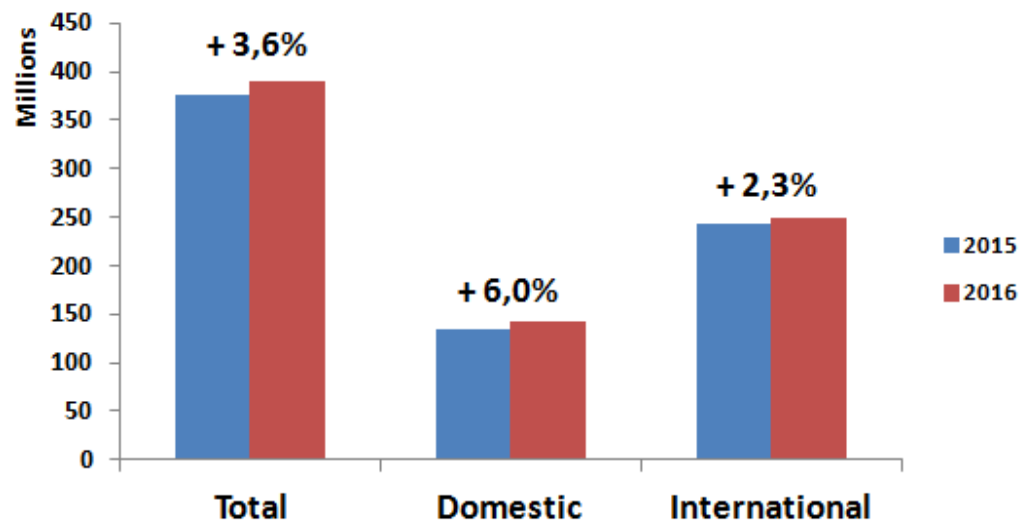
Absolute Change



Main Source Markets in % of International City Tourism 2016



International, Domestic and Total Market Developments 2016



	2015	2016	in %
Total	376,5	389,9	3,6%
Domestic	133,9	141,8	6,0%
International	242,6	248,1	2,3%

Sample size: 62 European cities



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Contact Information

○ European Cities Marketing

European Cities Marketing is a non-profit organisation, promoting and linking the interests of members from more than 100 major cities in 36 countries. Its mission is to improve the competitiveness and performance of the leading cities of Europe by providing a platform for convention, leisure and city marketing professionals to exchange knowledge, best practice and widen their networks to build new business.

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○ MODUL Research (Scientific Partner)

MODUL Research is a subdivision of MODUL University Vienna that aims to bridge the two domains of basic and applied research. MODUL Research engages in research projects that provide workable solutions to problems that private firms, industry associations, groups in civil society, and governmental organisations have identified as important.

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