Despite a wobbly world economy, European tourism demand remains stable and in positive territory. Prolonged US-China trade disputes are weighing down on global growth while, despite the recently agreed extension until January 2020, tourism industry fears around a make-or-break Brexit withdrawal deal remain. Although external risks are failing to dissipate, destinations continue to grow at a modest pace and the overarching regional outlook remains unaltered (3-4% in international tourist arrivals 2019).

Global air transport, measured in Revenue Passenger Kilometres (RPK), grew 4.1% between June and August 2019, below the 6.1% average over the past 10 years.

In Europe, air passenger growth is 5.4%, but is slowing more sharply than any other region.

In 2019, hotel occupancy rates in Europe grew slightly compared to the same period a year ago. This led to a 3.6% decline in RevPAR.

Europe’s top growth destinations (tourist arrivals, % change to a year ago)
- **Montenegro**: +18.1%
- **Turkey**: +16.7%
- **Luxembourg**: +10.1%
- **Lithuania**: +9.3%
- **Slovakia**: +9.0%

For detailed results, please have a look at the full report.

**Trends & Prospects - Q3/2019**

- **European Tourism**:
  - The average daily rate (ADR) was 4.0% lower compared to a year ago. This led to a 3.6% decline in RevPAR.
  - European destinations exhibited a slow but steady expansion over the summer.

- **Industry Performance**
  - Global air transport, measured in Revenue Passenger Kilometres (RPK), grew 4.1% between June and August 2019, below the 6.1% average over the past 10 years.

- **Special Feature: Brexit Developments**
  - A ‘no-deal’ Brexit would cause a 7% drop in UK outbound trips in 2020 and an 8% drop in 2021, relative to baseline projections. This equates to approximately 8 million fewer outbound trips by UK residents in 2021.

- **Demand in Key Overseas Markets Remains Strong**
  - Turkey was the fastest growing European destination for travel demand from India.

- **Data Sources**: TourMIS, Tourism Economics, STR Global, IATA