



News Release



Olivier Ponti, VP Insights, ForwardKeys

Europe's summer air travel fails to reach 40% of 2019

The UK and city tourism struggled but Greece and coastal resorts held up

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New research from ForwardKeys, which has the freshest and most comprehensive flight booking data available, reveals that international flights to European destinations in July and August reached 39.9% of pre-pandemic levels. This is significantly better than last year (which was 26.6%), when the COVID-19 pandemic caused widespread lockdowns; and vaccines were not yet approved. However, the picture was very mixed, with some destinations doing considerably better than others. Also, the outlook is not improving, as bookings slowed towards the end of the summer period.

Looking at performance by country, Greece was the stand-out. It achieved 86% of July and August arrivals in 2019. It was followed by Cyprus, which achieved 64.5%, Turkey, 62.0% and Iceland, 61.8%. Greece and Iceland were amongst the first countries to make widely publicised claims that they would accept visitors who had been fully vaccinated and/or could show a negative PCR test and/or could show proof of recovering from COVID-19. The countries which fared worst were those which rely more on long haul tourism, such as France and Italy and those which imposed the most onerous and volatile travel restrictions such as the UK, which languished at the bottom of the list, achieving just 14.3% of 2019 levels.

Top 20 European destination countries*

Tickets confirmed for international arrivals in July – August 2021, indexed to 2019

Rank	Country	Index	Rank	Country	Index
1 st	Greece	85.7%	11 th	Italy	36.0%
2 nd	Cyprus	64.5%	12 th	Sweden	35.8%
3 rd	Turkey	62.0%	13 th	Denmark	31.8%
4 th	Iceland	61.8%	14 th	Norway	31.6%
5 th	Croatia	60.3%	15 th	Austria	31.4%
6 th	Spain	50.5%	16 th	Netherlands	30.6%
7 th	Portugal	48.8%	17 th	Germany	26.7%
8 th	Poland	42.4%	18 th	Russia	23.2%
9 th	France	36.6%	19 th	Ireland	21.9%
10 th	Switzerland	36.5%	20 th	United Kingdom	14.3%

Source: ForwardKeys Air Ticket Data.

*countries with >1% share of total international arrivals in Europe

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Excluding low-cost carriers, intra-European flights made up 71.4% of arrivals, compared with 57.1% in 2019. The relative disappearance of long-haul visitors, who typically stay longer, spend more and focus their attention on cities and sightseeing, was underlined in rankings of the best and worst performing local destinations. Travel to London was particularly disappointing; it was at the bottom of the list of busiest European cities, achieving just 14.2% of 2019 arrivals. That list was headed by Palma Mallorca, also a major beach resort destination, reaching 71.5% of 2019 levels and by Athens, a gateway to numerous islands in the Adriatic, at 70.2%. The next best performing major cities were Istanbul, 56.5%, Lisbon, 43.5%, Madrid, 42.4%, Paris, 31.3%, Barcelona, 31.1%, Amsterdam, 30.7% and Rome, 24.2%.

Top 10 busiest European destination cities

Tickets confirmed for international arrivals in July – August 2021, indexed to 2019

Rank	City	Index
1 st	Palma Mallorca	71.5%
2 nd	Athens	70.2%
3 rd	Istanbul	56.5%
4 th	Lisbon	43.5%
5 th	Madrid	42.4%
6 th	Paris	31.3%
7 th	Barcelona	31.1%
8 th	Amsterdam	30.7%
9 th	Rome	24.2%
10 th	London	14.2%

Source: ForwardKeys Air Ticket Data.

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By comparison, leisure destinations proved to be much more resilient. A ranking of all major local destinations (ie: those with a market share over 1%) was dominated by traditional seaside holiday hotspots or the gateway to them. The leaders were Heraklion and Antalya, which exceeded pre-pandemic levels by 5.8% and 0.5% respectively. They were followed by Thessaloniki, 98.3%; Ibiza, 91.8%; Larnaca, 73.7% and Palma Mallorca, 72.5%.

Top 10 most resilient European destination cities



Tickets confirmed for international arrivals in July – August 2021, indexed to 2019

Rank	City	Index (%)
1 st	Heraklion	105.6%
2 nd	Antalya	100.5%
3 rd	Thessaloniki	97.6%
4 th	Ibiza	91.3%
5 th	Larnaca	73.6%
6 th	Palma Mallorca	71.5%
7 th	Athens	70.2%
8 th	Split	69.0%
9 th	Malaga	63.4%
10 th	Reykjavik	61.8%

Source: ForwardKeys Air Ticket Data.

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Aside from the macro trends, certain destinations fared relatively better or worse for more locally specific reasons. For example, Portugal, which is a favourite destination of UK holidaymakers, suffered when the UK changed its designation from green to amber in June; and Spain suffered at the end of July when Germany warned against all but essential travel.

Olivier Ponti, VP Insights, ForwardKeys commented: “When one considers how dreadful things were for tourism in Europe last year, this summer has been a very modest recovery story. Benchmarked against normal times, the continued low intensity of international air travel, less than 40% of normal, has been extremely damaging for the aviation industry. The continued absence of long-haul travellers, particularly from the Far East (it reached just 2.5% of pre-pandemic volumes this summer) will prove a severe blow to the visitor economy of several European countries.”

He concluded: “If there is an element of consolation, it is people “staycationing”, ie: taking a holiday in their own country. While the domestic aviation has a minority share of the market in Europe in normal times, it has held up much better during the pandemic because it has not been subject to such challenging travel restrictions. For example, the Canaries and the Balearics welcomed more Spanish visitors than they do in a normal season.”

Ends

About ForwardKeys

Founded in 2010, ForwardKeys has pioneered the way forward for tourism organisations, hotels, and retailers keen to understand who is travelling where, when, and for how long. We’ve managed to share such information by having the most comprehensive ticketing data covering the globe from online bookings to travel agencies and airlines.

From ticketing data to Seat Capacity and Total Air Market (TAM) the variety of datasets means you get a 360-degree view of the real travel ecosystem. Equipped with historical data, future bookings, and forecasts, planning, even with a pandemic, can be simpler with daily updated data.

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