



News Release



Olivier Ponti, VP Insights, ForwardKeys

Impact of the Ukraine war on travel:

Turkey and the Middle East benefit

Rich Russians holidayed while the rest remained at home

Europe – Asia Pacific flights take longer and cost more

(under embargo until 24th February 2023)

One year on from Russia's invasion of Ukraine, ForwardKeys, which has access to the freshest and most comprehensive flight booking data available, has analysed the impact of the war on travel. It reveals a number of trends, some expected and others surprising. Predictably, sanctions and the ban on direct flights between Russia and most of the EU has dramatically reduced Russia's air connectivity with the rest of the world. However, the Middle East and Turkey, which have not banned flights to and from Russia, have benefitted from a rise in air traffic to them and through them. In the year following the war, seat capacity between Russia and the Middle East was 27% greater than it was in the equivalent period before the pandemic and Turkey 26%. By comparison, it was 99% less to the EU and UK, 92% less to North America, 87% less to Asia Pacific, 76% less to Africa and the rest of the Americas and 20% less to the rest of Europe.

Seat capacity on flights to Russia

Mar 2022 – Feb 2023; vs Mar 2018 – Feb 2019



Origin continent	Var vs 2018/2019
North America	-92%
Rest of the Americas	-76%
Africa	-76%
Europe	-57%
EU&UK	-99%
Rest of Europe	-20%
Asia Pacific	-87%
Middle East	+27%
TOTAL	-57%

Source: ForwardKeys Seat Capacity Data.

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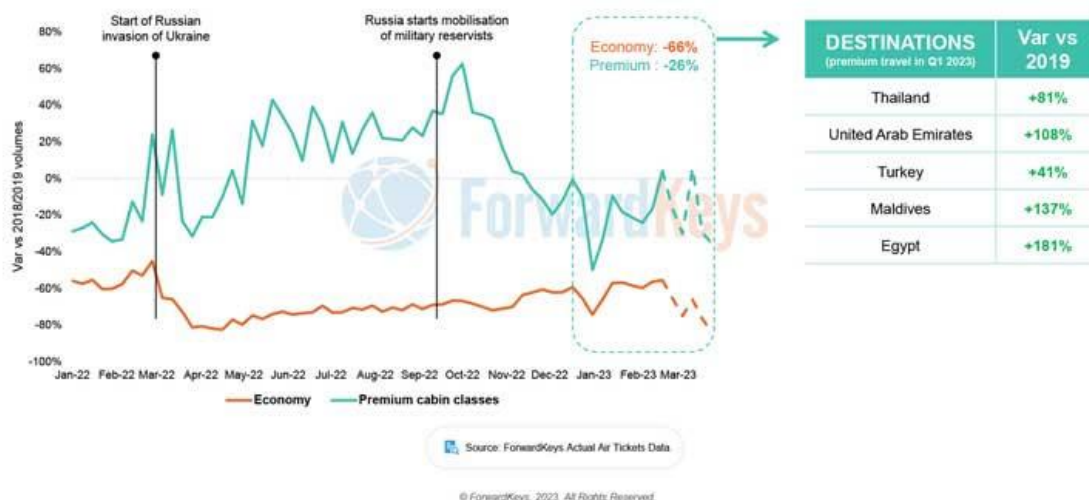
Perhaps the most surprising trend to emerge during the first ten months of the war, was wealthy Russians returning to international travel with a vengeance post pandemic, whereas ordinary Russians stayed at home. From the start of the war on 24th February until the end of December, premium class tickets for Russian outbound travel boomed, up by 10% on pre-pandemic levels. By comparison, economy class travel was down by 70%. However, from the start of 2023, the situation has changed, with international travel collapsing in the first quarter of the year. As of 15th February, premium class flight bookings for Q1 are currently 26% behind 2019 levels and economy 66% behind.

The destination which was most successful in attracting affluent Russians was Thailand, to where premium class travel was up by 81% on 2019. It was followed by the UAE, up 108%, Turkey, up 41%, the Maldives, up 137% and Egypt, up 181%.

Historical and booked international departures from Russia in 2022 and Q1 2023,



as of 15 Feb 2023 vs 2018/2019 levels



Looking at all travel, ie: premium plus economy, the picture is different. The most popular route for Russians during the past year has been to and from Antalya, the Turkish riviera resort. Flights there from Moscow's three major airports, Vnukovo, Domodedovo and Sheremetyevo, were up by 144%, 77% and 74% respectively, compared to pre pandemic levels. The next busiest route was between Istanbul and Moscow Sheremetyevo, up 73%, and Vnukovo, down 14%. The sixth busiest route was between St Petersburg and Antalya, up 49%. It was followed by Yerevan – Moscow Sheremetyevo, down 47%, Dubai – Moscow Sheremetyevo, up 228%, Tashkent – Moscow Domodedovo, up 84%, and Antalya – Ekaterinburg, down 31%.

Traffic on routes between Russia and rest of the world



Mar 2022 – Jan 2023; vs Mar 2018 – Jan 2019

Route			Var vs 2018/2019
▲ +5	1 st	Antalya (AYT) • Moscow (VKO)	+144%
▲ +7	2 nd	Antalya (AYT) • Moscow (DME)	+77%
▲ +8	3 rd	Antalya (AYT) • Moscow (SVO)	+74%
▲ +16	4 th	Istanbul (IST) • Moscow (SVO)	+73%
● 0	5 th	Istanbul (IST) • Moscow (VKO)	-14%
▲ +18	6 th	Antalya (AYT) • Saint Petersburg (LED)	+49%
▼ -4	7 th	Yerevan (EVN) • Moscow (SVO)	-47%
▲ +43	8 th	Dubai (DXB) • Moscow (VKO)	+228%
▲ +29	9 th	Tashkent (TAS) • Moscow (DME)	+84%
▲ +2	10 th	Antalya (AYT) • Ekaterinburg (SVX)	-31%
TOTAL			-67%

Source: ForwardKeys Total Air Market.

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One further notable impact of the war in Ukraine, and the closure of Russian air space to many airlines, has been the increase in costs and flight times between Europe and Asia Pacific. Those costs have been passed on in the form of higher air fares, which have also been influenced by the late reopening of Asian destinations. In the year following the start of the war, average air fares between Europe and Asia Pacific were 20% higher than before the pandemic in 2019 and 53% higher than last year. On flight times, 37% of air traffic between the two continents now takes more than eight hours, up from 23% before the invasion. Routes that have been worst affected include those between Japan and South Korea in Asia Pacific and France, Germany, Scandinavia & the UK in Europe.

Olivier Ponti, VP Insights, ForwardKeys, said: “The greatest impact on air travel to and from Russia since the invasion of Ukraine last February has been war-related sanctions, which have particularly benefitted Turkey and the Middle East, as they have maintained direct flights to and from Russia. We expect Chinese airlines will be another winner as they are still flying through Russian air space; and that gives them a competitive advantage in flight times and fuel costs on routes between Europe and Asia Pacific. However, the most eye-opening feature is the premium class boom, which appears to illustrate a division in Russian society between the rich, who holidayed in style, while the less affluent stayed at home.”

For further information: www.forwardKeys.com