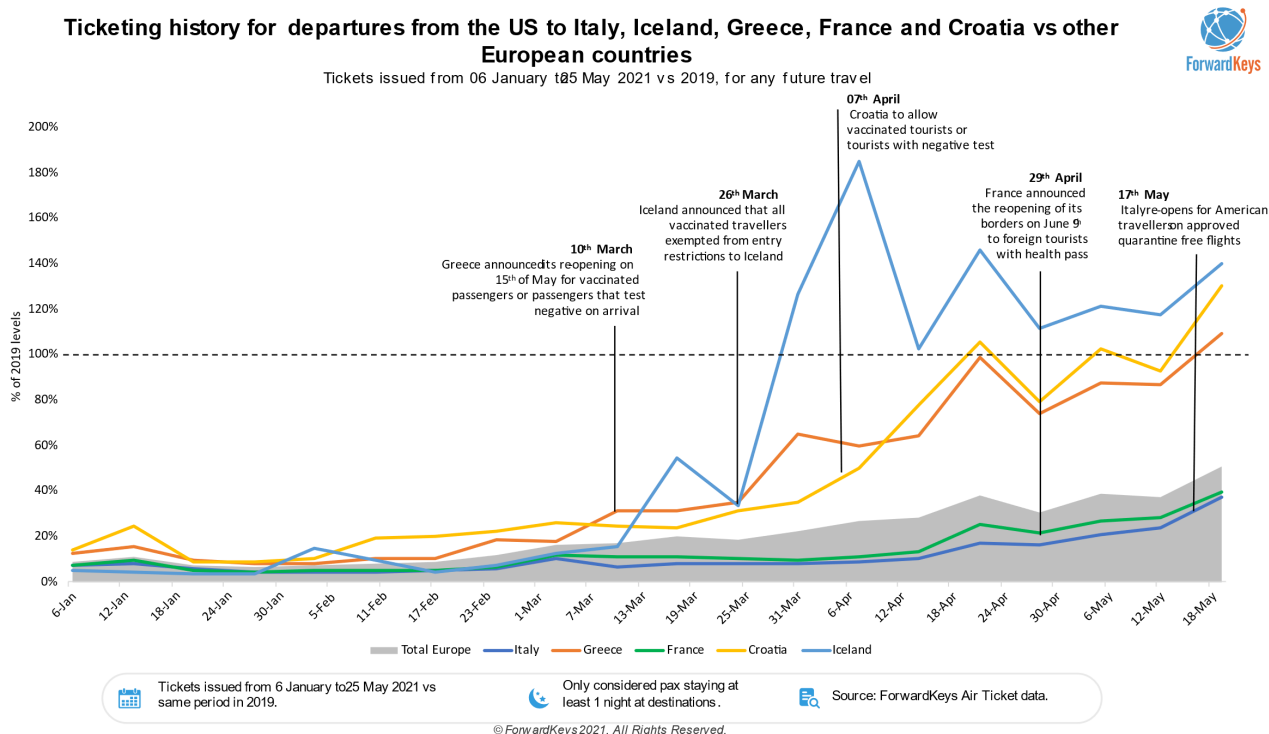


# An update on the European summer travel season

The team of analysts at ForwardKeys have been busy scrutinizing the air ticketing data for signs of travel recovery and have uncovered a remarkable story of hope – the European summer season might experience its first long-haul visitors from the USA since 2019.

## US travelers flock to Europe this summer

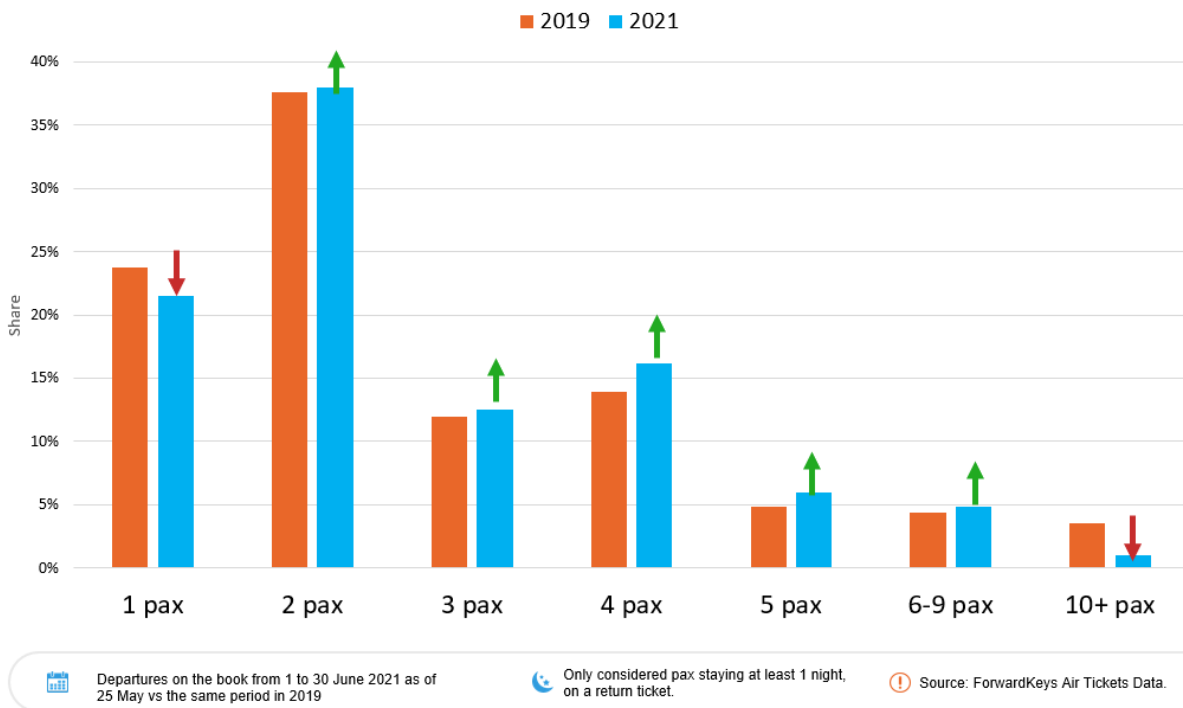
ForwardKeys has long encouraged governments and tourism organizations to announce their border re-openings as far in advance as possible. The team observed that this greatly benefited destinations such as Greece and Portugal for the 2020 summer season and there appears to be a case of déjà vu for Greece. However, we have newcomers to the early announcement club: Iceland and Croatia. Welcoming vaccinated both domestic and international travelers is not only a trend, but also a fast-growing reality.



The top cities for vaccinated US travelers to Croatia include Dubrovnik (34% of international travelers), Zagreb, the capital of Croatia (31%) and Split, the coastal destination (31%).

Croatian hotels and travel operators should also prepare themselves for travelers visiting in multiple numbers, not individually. Indeed, the data points to couples and families being the main markets traveling this summer to Croatia from the USA.

### Group size: US travellers in Croatia, June 2021 2020 vs 2019 shares



“The ticketing data is showing some interesting tips for hoteliers and tourism organizations to seize this summer in Croatia and Greece.

“Not only are US travelers traveling in pairs or more, but the average length of stay is up from 15 days in 2019 to 24 days in 2021,” says Luis Millan, Market Research Manager, ForwardKeys.

### US travelers fly in style: a sign of revenge travel?

Millan notes the fact that there is more high-class travel taking place this year, compared to 2019. This is particularly visible in the case of US travelers to EU countries. Overall, there has been an increase in the share of Economy Premium and Business class tickets by 5.8% for all international tickets to EU, and by 7.1% in the case of US travelers.

Italy remains the number one EU destination for US travelers, even though it is still significantly behind 2019 levels. The shift toward luxury travel is highlighted via the following Trans-Atlantic route with an increase in shares of high-class cabins by 14%.

“We have also checked France, as it is famous for luxury travel in Europe and similar as for Italy, it is still 80% behind 2019 levels, but 25.3% of tickets issued for travel from the US to France are of high-class cabins, which is an increase by 9.4 pp,” says Millan.

Italy and France still do not offer entry to fully vaccinated travelers, so we might see an increase in travelers once they make this announcement as per Greece and Croatia.