

Europe summer air travel a mixed bag

ForwardKeys has issued a report stating that international flights to European destinations in July and August approached 40% of 2019 levels, at 39.9%.

While this total is significantly better than last year's 26.6%, the number does not reflect the whole picture, which shows that there is clear discrepancy between destinations.

Greece has been the clear standout, achieving 86% of July and August arrivals in 2021 that it did in 2019, helped no doubt by its early announcement that it 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. Following Greece were Cyprus, at 64.5% compared to 2019, Turkey at 62.0% and Iceland at 61.8%.



Top 20 European destination countries*

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

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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Countries that rely more on long haul tourism, such as Italy and France, and those that imposed more onerous and volatile travel restrictions, such as the UK, fared the worst. The UK achieved only 14.3% of 2019's travelers.

Intra-European travel made up 71.4% of arrivals, excluding low-cost carriers. In 2019 this figure was 57.1%. Beach resort destinations fared the best whereas long-haul visitors were virtually non-existent.

Top 10 busiest European destination cities

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

Rank	City	Percentage
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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Traditional seaside holiday hotspots dominated summer European travel destinations. Leading were Heraklion and Antalya, actually exceeding pre-pandemic levels by 5.8% and 0.5% respectively, followed by Thessaloniki, at 98.3% of 2019's visitors; Ibiza at 91.8%; Larnaca at 73.7% and Palma Mallorca at 72.5%. Athens, which is 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, 31.2%, Barcelona, 31.1%, Amsterdam, 30.7% and Rome, 24.2%.

Top 10 most resilient European destination cities

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

Rank	City	Percentage
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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Some destinations fared relatively better or worse for reasons such as travel regulations. For example, Portugal 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.

Unfortunately, the outlook is not improving, as bookings slowed towards the end of the summer period.

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.”