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

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

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Top 10 busiest European destination cities

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

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

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

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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.”

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