European travel demand remained weak in early 2021 as international tourist arrivals dropped 83% in the first quarter of the year compared to the same period in 2019[1]. The gradual easing of restrictions, the ramp-up in vaccinations in Europe, and the reopening of the EU to fully vaccinated travellers from third countries provide some momentum ahead of the peak summer months. Downside risks remain following the surge in infections of the more transmissible Covid-19 Delta variant, which could force the return of travel restrictions.

In Europe, total RPK have shown limited signs of improvement in most months. In April, RPK volumes were 82% below their 2019 equivalent.

Latest data from Eurocontrol show a wide variation in airport traffic across European destinations, ranging from -48% in Turkey to -96% in Denmark compared with 2019 levels. Turkey had the lowest decline in 2019, April 2021 represented the most improved month since the pandemic. Domestic air passenger traffic has returned to pre-pandemic levels, while Greece is just behind. Serbia (10.9%), Croatia (-91.7%) and Iceland (-10.9%) have seen the smallest decline in April 2021.

Limited signs of improvement have been observed for European short-term rentals, with demand remaining weak across Europe.

Global Air Passenger Traffic Growth

Source: TourMIS


data to May,

Industry Performance

While global RPK were still 65% lower compared to April 2019, April 2021 represented the most improved month across the span of the pandemic.

Relative to April 2019, international RPK was down 87%, while domestic RPK was down 24%.

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