

## RECOVERY OF EUROPEAN TOURISM IN SIGHT THIS SUMMER

- **Improvements in vaccination rates and the introduction of the EU Digital COVID Certificate provides hope for tourism rebound in Europe for the summer months**
- **Intra-European trips are expected to account for over 80% of Europe's travel in 2021**
- **Downside risks remain, with uncertainty surrounding new variants with the potential to disrupt re-opening plans**

**Brussels, 8 July 2021:** European travel activity is set to build some momentum moving into the peak summer months due to the gradual easing of restrictions, the ramp-up in vaccinations, and the EU's recent reopening to more third countries and fully vaccinated travellers from abroad. Travel demand is expected to pick up considerably in the second half of 2021, though international arrivals will still remain 49% below pre-pandemic levels in 2021. That is according to the latest quarterly '[European Tourism Trends & Prospects](#)' report published today by the European Travel Commission (ETC).

The report notes that this summer season is essential for the sector as European travel demand remained weak in early 2021 – international tourist arrivals dropped 83%<sup>1</sup> in the first quarter of the year compared to the same period in 2020. Meanwhile, downside risks linger following the surge in infections of the more transmissible COVID-19 Delta variant, which could force the return of travel restrictions.

Speaking today, President of ETC, Luís Araújo, noted *"In view of the rapidly advancing vaccination programmes, which reduce pressure on national health systems and protect our most vulnerable, Europe is now managing the COVID risks well both for locals and our long-awaited travellers. We therefore believe that safe travel is possible this summer. The reopening is also fuelled by the strong desire of people to travel again and secured by the readiness of our sector to provide safe and responsible travel experiences. As Europe is opening up, it is imperative that clear and coherent messages are communicated to prospective travellers."*

### Declines in foreign tourist arrivals to Europe continue well into 2021

Hopes for summer relief are high following the catastrophic start of 2021 in European tourism, with latest available data indicating that 3 in 5 destinations posted declines over 80% in international tourist arrivals. Austria has so far suffered the greatest percent decline in visitors. COVID-19 tight containment measures wiped out expectations of a winter tourism season, resulting in a 97% plunge in tourist arrivals to the Alpine country.

On the contrary, Croatia significantly outperformed other European destinations, reporting a 23% increase in visitor arrivals. The country led the way in waiving most COVID-19 travel entry restrictions for international travellers provided they had been vaccinated, could present a negative test, or had recovered from the virus.

### Europe's tourism rebound in reach

Intra-European travel is expected to bolster travel demand in the second half of 2021, with improving epidemiological situation across Europe enabling governments to ease restrictions and satisfy the longing among people to travel again. The latest forecast shows that intra-European travel will account for 83% of Europe's inbound arrivals in 2021 compared to 77% in 2019.

As vaccinations gather pace across Europe with over 62% of the EU's adult population having received at least one vaccine dose, European travel demand this summer is projected to catch up. ETC's data shows that 54% of

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<sup>1</sup> UN World Tourism Organisation (UNWTO)

surveyed Europeans intend to book a trip once they have been vaccinated against COVID-19<sup>2</sup>.

The EU's Digital COVID Certificate, active as of July 1<sup>st</sup>, is also expected to support the release of pent-up travel demand and accumulated excess savings during the pandemic.

### **Bumpy road to long-haul travel recovery**

Long-haul travel demand is projected to recover more slowly, with barriers set to remain in place well beyond the end of 2021. While domestic and intra-European travel is expected to return to 2019 volumes by 2022 and 2023 respectively, travel from long-haul source markets is not likely to recover until 2025.

The US market is expected to make the most significant contribution to Europe-wide travel demand growth in the coming years. Announcements to welcome vaccinated American travellers have already boosted Transatlantic travel to destinations such as Iceland, Croatia and Greece in May 2021. According to ForwardKeys' data, issued tickets from the US to Croatia (+0.5%) and Iceland (+22.7%) have surpassed 2019 levels, while Greece is just 10.9% behind.

China is also expected to make a sizeable contribution to European travel growth over the next decade. Despite accounting for a smaller proportion of arrivals to the region, an expected average annual growth rate of 12% would see Chinese arrivals contribute 4.7% of overall arrivals growth to European destinations over the period 2019-30. However, while domestic traffic in China continues to show remarkable recovery to pre-pandemic levels, Chinese international travel remains stagnant for now.

*The report can be found at this link: <https://etc-corporate.org/reports/european-tourism-2021-trends-prospects-q2-2021/>*

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#### **[About the European Travel Commission](#)**

The **European Travel Commission (ETC)** represents the national tourism organisations of Europe. Established in 1948, ETC's mission is to strengthen the sustainable development of Europe as a tourist destination and to promote Europe in third markets. Its 32-member tourism boards work together to build the value of tourism for all the diverse European destinations through co-operation in sharing best practice, market intelligence and promotion. For more information, visit [www.etc-corporate.org](http://www.etc-corporate.org) and follow @ETC\_Corporate.

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<sup>2</sup> "Monitoring Sentiment for Domestic and Intra-European Travel – Wave 7"