

EUROPE'S SUMMER TRAVEL DEMAND RETURNS TO PRE-PANDEMIC LEVELS



The summer of 2024 is poised to mark a robust recovery in travel demand across Europe, demonstrating the resilience of the travel industry as it returns to pre-pandemic levels.

ForwardKeys reports significant shifts in traveler preferences, indicating a positive outlook for destinations worldwide as they strive to attract European travelers in the coming years. **Experts anticipate that this summer season will set a new benchmark for European travel, both within the region and beyond.**

The data on travel to European urban destinations in July and August 2024 reveal a dynamic shift in consumer preferences. There's a noticeable surge in interest in nature (+19%) and urban (+14%) destinations, compared to traditional sun and beach destinations (+8%). This evolving trend provides valuable insights into the changing landscape of European travel demand.

At the sub-regional level, which refers to specific regions within Europe, international arrivals to Central/Eastern Europe grew by 25%, Western Europe by 15%, and Northern Europe by 13%, surpassing Southern European destinations, which saw an 11% increase.

From January to April 2024, London accounted for 5% of flight searches, up 1.9 percentage points from the previous summer. This increase is linked to the anticipation of the Paris Olympics, and convenient transport links to the French capital.

Paris also saw a rise in popularity (+0.5 percentage point increase). However, its share of searches slightly decreased to 4%, likely due to visitors to the Olympics planning their travel well in advance.

Barcelona maintained its popularity from the previous year, while Istanbul (+0.4 percentage points), Rome (+0.7 pp), and Milan (+0.7 pp) all gained relative popularity. However, destinations in Spain, Greece, and Portugal, including Athens, Lisbon, Madrid, and Palma de Mallorca, experienced a decline in demand following the high post-Covid-19 period, reflecting changing preferences among European travelers.

On the other hand, emerging destinations like Tenerife saw a promising increase of 0.41 percentage points, and the Turkish city of Izmir experienced a 0.25 percentage point rise in interest among mid-level destinations. The growing interest in northern European cities such as Reykjavik (0.21 pp) and Munich (0.15 pp) piques curiosity, reflecting the popularity of destinations with cooler summer temperatures among vacationers.

In Eastern Europe, Tirana continues to grow in popularity with a 0.07 percentage point increase, building on its success in recent years. It is joined by Yerevan (0.03 pp) and Tbilisi (0.09 pp), popular with European and Russian tourists.

Outbound travel from Europe shows clear trends, with year-on-year growth in intra-European travel, which refers to travel within Europe (+14%) and long-haul travel to various Asian markets (+16%).

Data for July and August shows that European travelers are increasingly choosing to explore destinations further afield, such as Beijing (+132%), Osaka (+66%), Bangkok (+21%), Colombo (+21%), and Kuala Lumpur (+14%). Factors contributing to this trend include:

- Improved connectivity.
- Visa waivers for Europeans entering China.
- Favorable euro/yen exchange rate.
- Additionally, travel demand to the US markets of Chicago (+14%) and Miami (+9%) is moderately growing.

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