

## 【欧州】 【Common】

Common - COVID-related development in transport and tourism:  
Recent Eurostat and Eurocontrol statistics: Signs of recovery  
in European tourism and aviation sectors despite the  
continuation of the COVID-19 pandemic?

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### 【概要 : Summary】

The COVID-19 pandemic, which fully hit Europe in March 2020, has unprecedented negative impacts on the global travel and tourism industry at local, regional, national, and global level. The pandemic and the related restrictions on the mobility of people in response to the COVID-19 outbreak continues to affect the tourism and aviation sector.

In the EU, the pandemic led to unprecedented border closures between EU Member States of the Schengen area and restrictions of the free movement of people for non-essential travels. The total or partial suspension of flights and other measures like quarantine or self-isolation, or the suspension of visa issuances brought touristic activities to a global standstill.

The reopening of tourist destinations in the EU in the summer season 2020 only lasted shortly before a new pandemic wave started. With the improvement of the pandemic situation in spring 2021, based on the start of massive vaccination campaigns in the EU, several EU Member States partially reopened for tourism in the summer vacation season. Nevertheless, in the EU, the tourism industry suffered severe economic

damages due to the lockdowns and due to the travel restrictions in 2020. In 2021, the continuation of the pandemic and the initial lack of a sufficient quantity of vaccines had still a negative impact on the free movement of people in the EU and consequently on the EU's tourism sector. However, the improvement of the pandemic situation in summer 2021 together with the introduction of the Digital COVID Certificate allowed for a wider relaxation of travel restrictions. The summer 2021 has shown some signs of recovery for the tourism sector and aviation, as the Eurostat and Eurocontrol statistics confirm. However, a further recovery of the tourism sector in Europe will highly depend on the successful continuation of vaccination campaigns and the confinement of the SARS-CoV-2 virus spread.

### 【記事 : Article】

1. COVID-19 pandemic impact on EU's tourism  
After COVID-19 was declared a pandemic on 11 March 2020, the global tourism came to a standstill, as travel restrictions were introduced in about 96% of touristic destinations. In the EU, the lockdown measures related to the COVID-19

pandemic had a detrimental impact on the tourism sector, as all domestic and international travel was restricted. In fact, aviation and tourism were among the first sectors to be hit by the pandemic in spring 2020, as most EU Member States temporarily closed not only external borders but also their EU-internal Schengen border as part of their lockdown measures to confine the COVID-19 spread. In a reaction on the lockdowns and travel bans, airlines grounded almost their entire fleets.

Due to the uncoordinated lockdown between EU Member States to tackle the COVID-19 pandemic, on 13 March 2020, the Commission published a Communication COM (2020) 112 final to give a coordinated economic response to the COVID-19 outbreak. Furthermore, since not only the movement of people but also freight transport had been affected by the lockdown and the closing of borders within the Schengen Area, the European Commission published a Communication on the implementation of the Green Lanes in freight transport (C (2020) 1897 final) on 23 March 2020 to ensure the availability of goods and essential services in the EU.

In the EU's tourism sector, all touristic establishments like hotels and other accommodations across Europe had to close due to the lockdown measures in spring 2020. More than half of the EU's touristic businesses are located in the EU's southern Member States Italy, Spain, and France, which were also the European countries hit worst by the COVID-19 pandemic. Restoring the freedom of movement for citizens in the EU and lifting internal border controls after the pandemic situation improved in summer 2020 was a necessary precondition to restore tourism in the EU in summer 2020. However, this was achieved only partially due to the new wave of COVID-19 infections. Meanwhile, the summer vacation season 2021 has shown some small signs of recovery of the tourism industry, based on vaccination campaigns in the EU Member States and

the reduction of COVID-19 cases in spring 2021. Depending on the further development of the COVID-19 pandemic and the reintroduction or continuation of restrictions, the European tourism sector will recover sooner or later. Also, in future, common rules and protocols for the avoidance of the spread of the SARS-CoV-2 virus and the confinement of COVID-19 cases will be necessary for all tourist destinations in the EU.

## 2. EU's tourism sector during the COVID-19 pandemic since June 2020

Tourism is an essential sector in the EU's economy and in 2019, the last year before the COVID-19 pandemic hit Europe, the EU tourism sector accounted for 9.5% of the EU's GDP, according to the Commission Staff Working Document SWD (2020) 98 final.

In March 2020, lockdown measures and travel restrictions were introduced in almost all EU Member States and all Schengen Associated Countries, including Iceland, Liechtenstein, Norway, and Switzerland for all non-essential travels from third countries and domestic travels in March 2020. According to Eurostat (2021a) statistics, due to the COVID-19 pandemic and the related lockdown measures the touristic activities experienced a near stillstand after March 2020 for almost the entire year 2020.

The summer season (June-August) is a crucial time for the EU's tourism sector, and during an average summer season, residents of the EU Member States make 385 million tourism trips and spend around €190 billion on their holidays (Eurostat 2021a). However, in 2020, although the pandemic situation improved in some EU Member State's tourism destinations over the summer 2020, Eurostat's analysis (2021a) underlines that the pandemic and related lockdowns had severe consequences on the number of nights spent in tourist establishments. The surge in the number of COVID-19 infections from August 2020 onwards in some of the major touristic centres in Europe

around the Mediterranean Sea led to a sudden end of the recovery of the tourism sector.

According to Eurostat (2021a), in the EU-28, in 2018, the share of resident tourists, travelling in their own country was 53.3%, while non-residents from other EU countries accounted for 34.8%, followed by non-residents from outside the EU (11.9%). In 2020, due to the pandemic's impact, about 60% of German residents considered to staying at home rather than travelling abroad. A similar proportion of the Spanish residents planned to stay in their home country. The Italians and French were slightly more inclined to travel abroad. In all four countries, only between 8% (for Spain) and 15% (for Germany) of residents planned to travel abroad.

Since the European Commission has no decision-making power regarding the re-opening of internal borders or the tourism sector, the Commission presented guidelines and recommendations in a Tourism and Transport Package to coordinate a support for the European tourism sector and transport sector to recover from the COVID-19 pandemic related lockdown on 13 May 2020. The aim was to give the EU Member States a common guideline on how to gradually lift travel restrictions and allow the transport and tourism sector to recover. It also includes a guidance on transport and the save resuming of tourism services (C(2020) 3250 final). In its "Communication for the Commission: COVID-19: EU Guidance for the progressive resumption of tourism services and for health protocols in hospitality establishments" (C (2020) 3251 final), the Commission gives guidance for restoring tourism activities safely and gradually and for developing health protocols for hospitality establishments such as hotels.

However, according to the Eurostat (2021d) statistics, tourism has been heavily impacted by the COVID-19 pandemic in the main summer months of June to September 2020. The number of nights spent in tourist accommodation in the EU in 2020

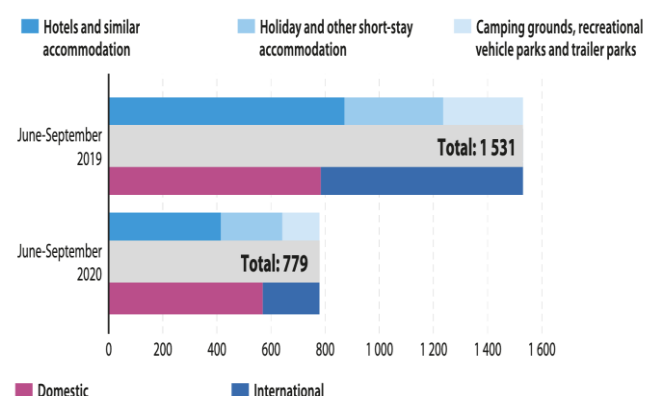
was 779 million, compared with 1,531 million the previous year. The number of nights spent in the EU tourist accommodation decreased by -49.1% in the period from June to September 2020 compared to the previous year (Eurostat 2021d). Cyprus, Greece, and Malta were the most affected countries with drops exceeding 70%, while the Netherlands and Denmark reported the smallest drops of less than 35%. In 2020 compared with 2019, the nights spent by non-residents of the country (foreign visitors) fell by 68%, while nights spent by residents (domestic visitors) fell by 38%.

Considering the COVID-19 pandemic's impact on the EU's tourism sector, at European level, in 2020, revenue losses due to the impact of the COVID-19 pandemic reached 85% for hotels and restaurants, 85% for tour operators and travel agencies, 85% for long-distance rail and 90% for cruises and airlines.

Fig 1: Comparison of summer nights spent in EU's tourist accommodations, June to September 2019 and 2020

### Summer nights in EU tourist accommodation

(million nights, EU, June-September 2019 and June-September 2020)



Source: <https://ec.europa.eu/eurostat/documents/321749/4/13394938/KS-EI-21-001-EN-N.pdf/ad9053c2-debd-68c0-2167-f2646efeaec1?t=1632300620367>

Considering the results for tourism summer nights in EU tourist accommodation in billion nights, comparing June-September in 2019 and June-

September in 2020, in summer 2019, domestic tourists (meaning tourists being residents in the same country where they were staying as tourists) accounted for 51.2% of the total nights spent in tourist accommodation, with international tourists making up the remaining 48.8%. In summer 2020, the share for domestic tourists rose to 73.0%, while the share for international tourists fell to 27.0% (Eurostat 2021d).

The number of arrivals in EU tourist accommodation fell strongly in March 2020, compared to 2019. Later in the spring and summer months in 2020, the number of arrivals partially recovered. In August 2020, the number of domestic arrivals was 86% of the 2019 level, while international arrivals were at 35%. As the second wave of infections grew in autumn and winter 2020, the number of arrivals fell again strongly and more than in a typical year. (Eurostat 2021d).

Only in spring 2021, the preconditions for travels slightly improved with the increased availability of vaccinations. However, the slow progress of vaccination campaigns in the EU endangered the summer vacation 2021. Despite the opening of EU-internal borders for the free movement of people under the Digital COVID Certificate system, all possible measures need to be taken to revive tourism as far as the epidemiologic situation allows for a re-establishment of touristic activities. Beyond the introduction of the Digital COVID Certificates, the sector's resilience and sustainability needs to be improved in the long-term.

Regarding the progress on vaccinating the population in the EU Member States, as of 24 September 2021, 72.6% of the adult population in the EU/EEA had received full vaccination against COVID-19 (ECDC 2021). However, the EU's passenger transport, in particular aviation, and the tourism sector will only be able to completely recover if the vaccination rate further increases and the pandemic situation further improves.

### 3. Development in commercial aviation

#### 3.1. Eurostat key figures 2020

According to Eurostat (2021b), the pandemic's impact became visible in commercial air transport in March 2020, with a 44% decrease in the total number of commercial flights in the EU, compared with the same month in 2019. With COVID-19 restrictions taking full effect, the decrease in the number of commercial flights reached -91% in April 2020, -90% in May, and -84% in June 2020, compared with the same month in 2019 (Eurostat 2021b). During the peak summer months of 2020, there was only a partial recovery, with decreases of -64% in July and -53% in August 2020. In June 2021, the number of commercial flights stood at 302.200 in compared with 663.000 in June 2019, which is about -54% compared to pre-pandemic 2019 figures (Eurostat 2021b). This is an improvement to the months before, as in May 2021, the decrease was still -67% compared to May 2019. In June 2021, the air transport industry's number of commercial flights showed first signs of recovery (Eurostat 2021b).

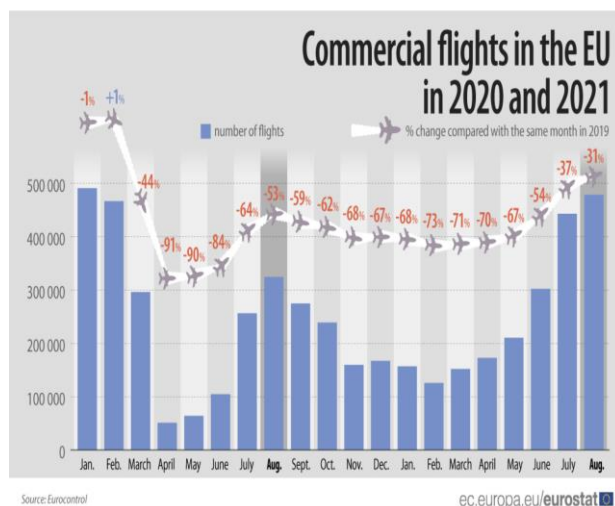
The Eurostat key figures (2021d) show the EU's air passenger transport (in million passengers carried - arrivals and departures) and compare results of 2019 with 2020 figures. In 2019, the total number of passengers carried by air to or from airports in the EU was around one billion (1,034 million). While the number of passengers carried in January and February 2020 were broadly in line with the numbers for the same months of 2019, figures were much lower for the rest of 2020, mainly until September 2020. In the seven months from March to September 2020, 110 million passengers were carried by air to or from airports in the EU, compared with 675 million in the same period of 2019. Accordingly, the number of passengers fell by -84%. Air passenger transport remained at a very low level in May 2020 but increased slowly in June and more strongly in July 2020. At the peak of the summer tourist season, in August 2020, passenger numbers on

national (domestic) flights within EU Member States were back up to 55.7% of their 2019 level. Passenger numbers on flights between EU Member States were at 31.7% of their 2019 level. Passenger numbers on flights outside of the EU remained the most subdued in August 2020, at 17.2% of their 2019 level (Eurostat 2021d).

### 3.2. Commercial air transport in August 2021: signs of recovery

According to the latest Eurostat data of 14 September 2021 (Eurostat 2021e), the commercial flight data shows some signs of recovery in summer 2021. In August 2021, the number of commercial flights in the EU increased by 48% compared with August 2020. This is still well below the pre-pandemic levels, more precisely -31% lower than August 2019 levels. In absolute terms, the number of commercial flights stood at 479,000 in August 2021, compared with 325,000 in August 2020 and 696,000 in August 2019 (Eurostat 2021e). August 2020 figures were -53% below the commercial flights in August 2019.

Fig. 2: Commercial flights in the EU in 2020 and 2021, in comparison to 2019



Source: <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/ddn-20210914-1>

According to Eurocontrol (2021b), in the most optimistic case, air traffic cannot be expected to reach 2019 levels until 2024 at the earliest.

Given the current state of vaccine rollout progress and since most restrictions are still in place in summer 2021, the comparison of the summer month August 2019, 2020, and 2021 shows that in August 2021, the number of commercial flights in the EU increased already by significant 48% compared with August 2020. This is still well below the pre-pandemic levels (-31% compared with August 2019), (Eurostat 2021e). However, it shows that the recovery of commercial flights has started. With this recovery of commercial flights, also a recovery of tourism in the EU can be expected to pick up, considering that the pandemic situation does not worsen anymore significantly.

Comparing the decrease in commercial flights of August 2021 with the pre-pandemic year 2019, there are EU Member States, which suffered less decreases in the number of flights, while other Member States suffered a worse decrease in commercial flights than the EU average of -31% compared to August 2019 (Eurostat 2021e). The EU countries with the lowest decreases in commercial flights in August 2021 were Greece (-7% compared with August 2019), Romania (-18%) and Croatia (-22%). In contrast, flights decreased by more than half in Finland (-60% compared with August 2019), Ireland (-55%), Slovenia (-54%), Slovakia (-52%) and Czechia (-51%) (Eurostat 2021e).

Considering the development of flights by aircraft operators, Eurocontrol's comprehensive assessment (2021c) shows that on 15 September 2021, Ryanair had a reduction of -13% of flights compared to 2019. However, over the first two weeks in September 2021, the number of flights remained stable at about 2,213 flights. Lufthansa experienced an increase of 3% over two weeks, plus 22 flights. In comparison to 2019, Lufthansa experienced a decrease in flights of -52%, EasyJet had even a higher decrease compared to 2019 of -58%. SAS had -55% decrease and Air France -45%, compared to 2019 (Eurocontrol 2021c).

## 4. Conclusion

The COVID-19 pandemic has had unprecedented negative impacts on the global, intra-EU and domestic aviation and the tourism industry in 2020, due to the pandemic-related lockdown measures. Even more than a year after the start of the pandemic, the situation of the tourism sector in the EU is still difficult, as the free movement of people is still partially restricted within the EU.

The latest statistics of Eurostat and Eurocontrol show that the aviation market experienced a slight recovery in summer 2021. It depends on the further development in the COVID-19 pandemic if this positive development will continue and if the airlines will manage to recover. However, most airlines have still flight numbers, which are around 50% below the number of flights in the last pre-pandemic year 2019, demonstrating that their recovery will still take longer time. In this respect, Eurocontrol's prediction that in the most optimistic case, air traffic could be expected to reach 2019 levels in 2024 at the earliest, as most optimistic outlook, could prove to be correct.

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