

Hermes Airports: Significant improvement of Cyprus Tourism

A screening of the passenger traffic for Summer 2021

After 18 challenging months due to the pandemic, and with traffic reaching its lowest point, the last few months demonstrate a substantial recovery which bears hopeful messages for a stable upturn, with the hope that the worst is behind us.

Since the beginning of the pandemic – and during the various lockdowns- at Hermes Airports we have maintained an ongoing and vital communication with the airlines as well as the tourism stakeholders, as air connectivity for an island such as Cyprus is pivotal. Our goal was -and still is- to be collectively proactive instead of reactive, and we acted based on this mindset, to be prepared in all aspects, for the recovery of traffic. It is noteworthy that this summer, despite the ongoing hesitation to travel from a significant portion of the public internationally, 50 airlines operated flights from Cyprus, out of the 70 which were operating flights in 2019, while most of them will continue to operate flights to our country during the winter months.

Stable increase during summer '21

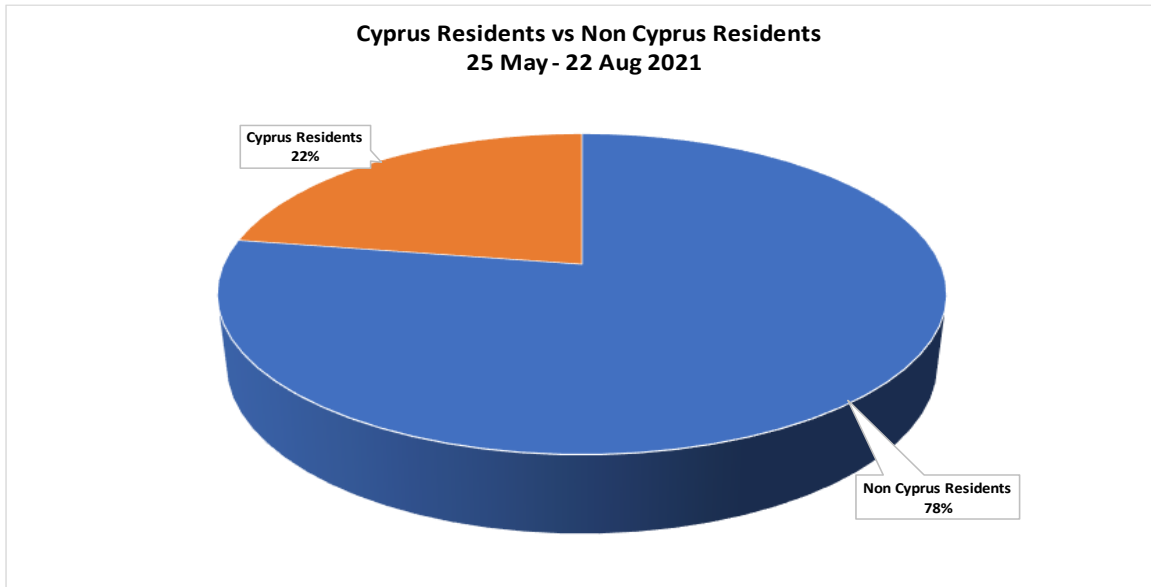
The results of the first 8 months of 2021 show that we still have a long way to cover until we reach the pre-pandemic levels, as passenger traffic for the specific period was at 2,511,239, which corresponds to 33% of 2019 (for the respective period). Nonetheless, the performance of the summer period shows more optimistic trends as during August alone, passenger traffic reached 867,104 passengers, approximately 60% of 2019, while in June and July we had 440,944 and 772,136 passengers respectively. Indicative is the fact that last August passenger traffic did not exceed 296,266 (Larnaka Airport: 221,791/ Pafos Airport: 74,475).

It is also useful to observe how the travel map to and from Cyprus is shaped, as despite the consequences of the pandemic which has dramatically affected travels on an international level, there are trends worth observing. This year, contrary to previous ones, we had the opportunity to access a huge volume of data from the Cyprus Flight Pass which facilitate a qualitative analysis in real numbers, something which was previously done through a passenger survey. We analyzed the Cyprus Flight Pass data for the period 25 May – 22 August, which have allowed a profile of the passenger traffic with useful information that we would like to share with the media and tourism stakeholders.

For the specific period, we processed more than 1 million unique data from the Cyprus Flight Pass, and we would like to thank the Ministry of Transport for granting us access to them¹, taking into consideration some weaknesses in the data calibration from the platform. Through the below analysis and graphs, we attempt to shape a profile of the arriving and departing passengers for the summer traffic correlating parameters such as countries of origin, airlines, city of stay and types of accommodation.

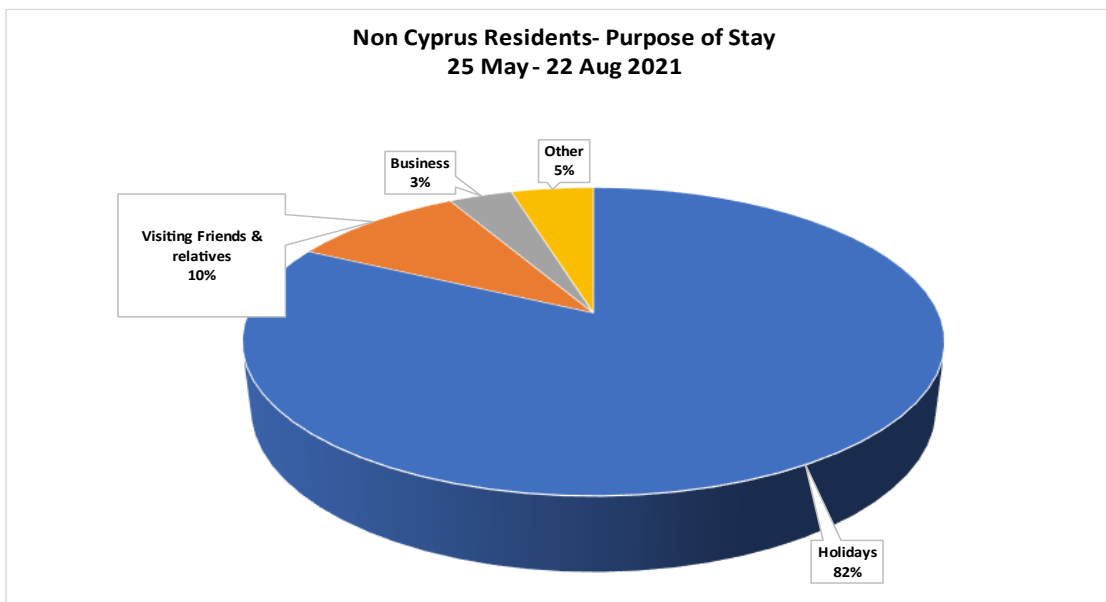
¹ Please note that the data do not include any personal information

Graph 1 Cyprus Residents Vs Non-Cyprus Residents



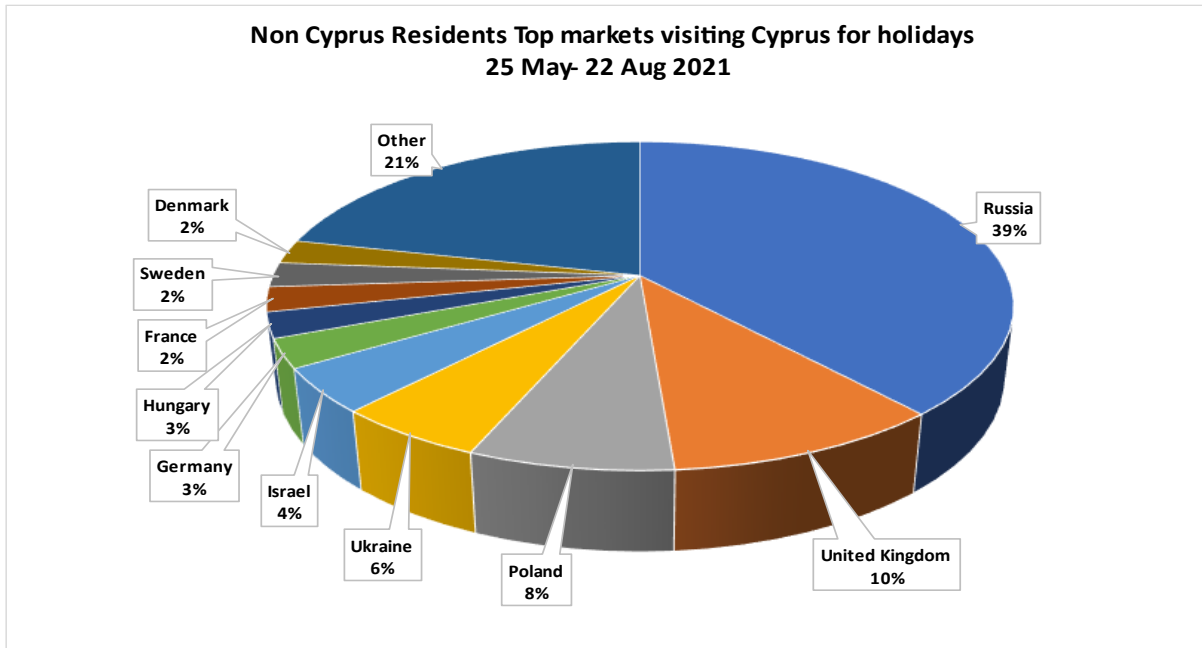
Trips made by Cyprus Residents appear to be decreased, being 22% of total traffic in relation to previous years which were around 30%. The 78% of total passenger traffic reflects passengers who are non-Cyprus residents.

Graph 2 Purpose of Stay for Non-Cyprus Residents

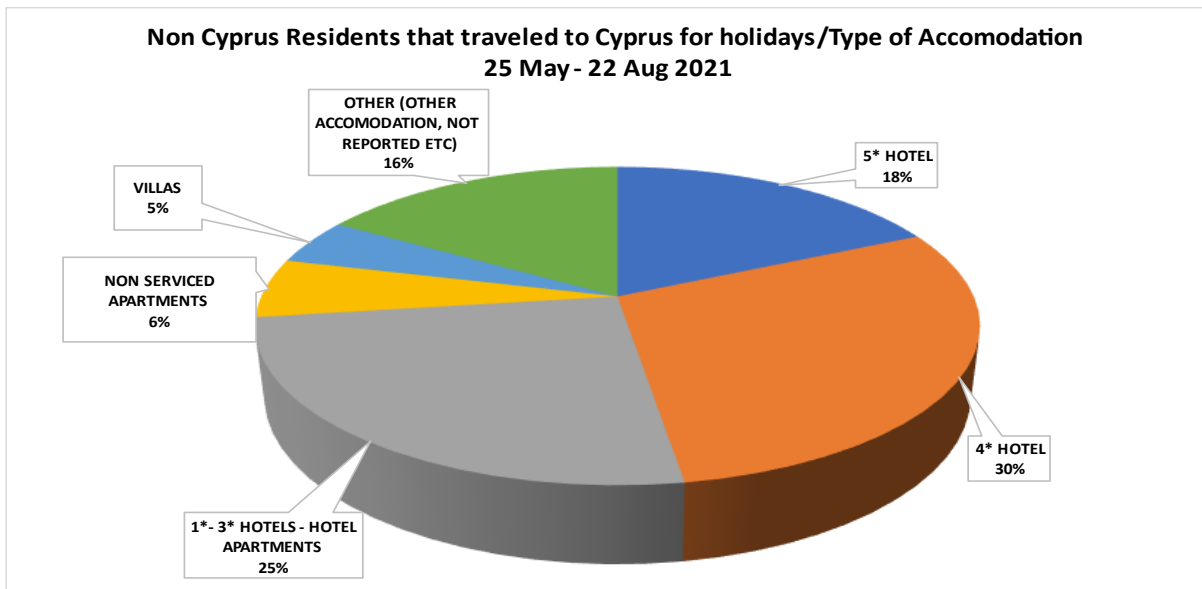


The 82% of non-Cyprus residents travelled to Cyprus for holidays, a 10% visited friends and relatives while 3% came for business purposes.

Graph 3 Top Markets for Holiday Visitors

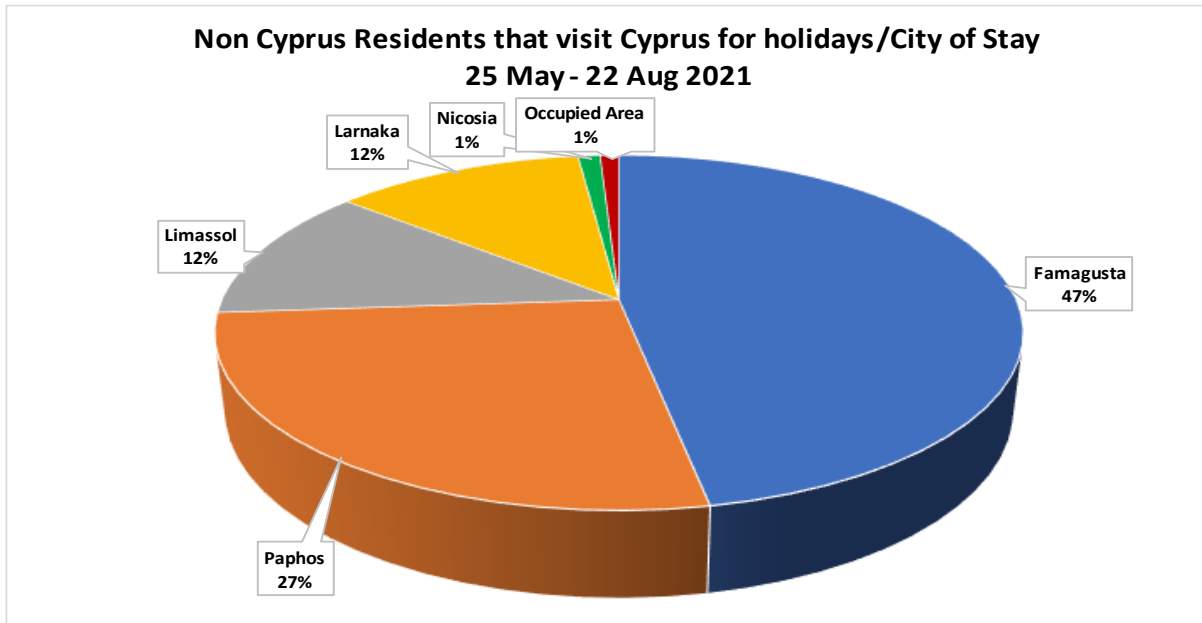


Graph 4 Type of Accommodation for Holiday Visitors



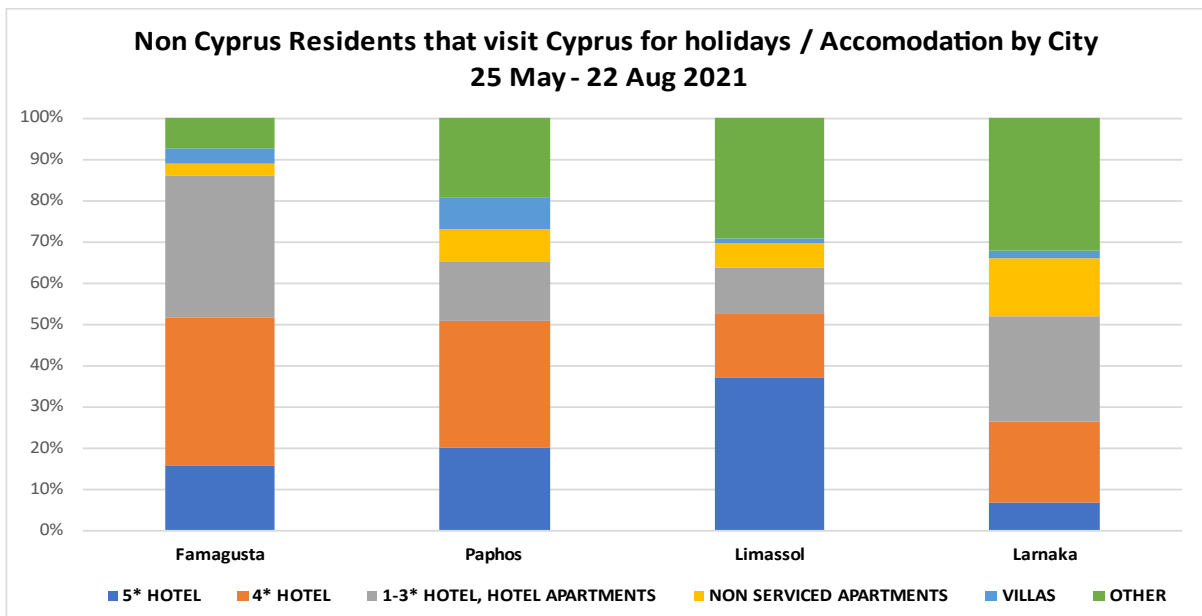
For the classification of 1*-3* hotels and hotel apartments, the analysis made reflects licensed accommodation. Airbnb is included in the category Other.

Graph 5 City of Stay in Cyprus for Holiday Visitors

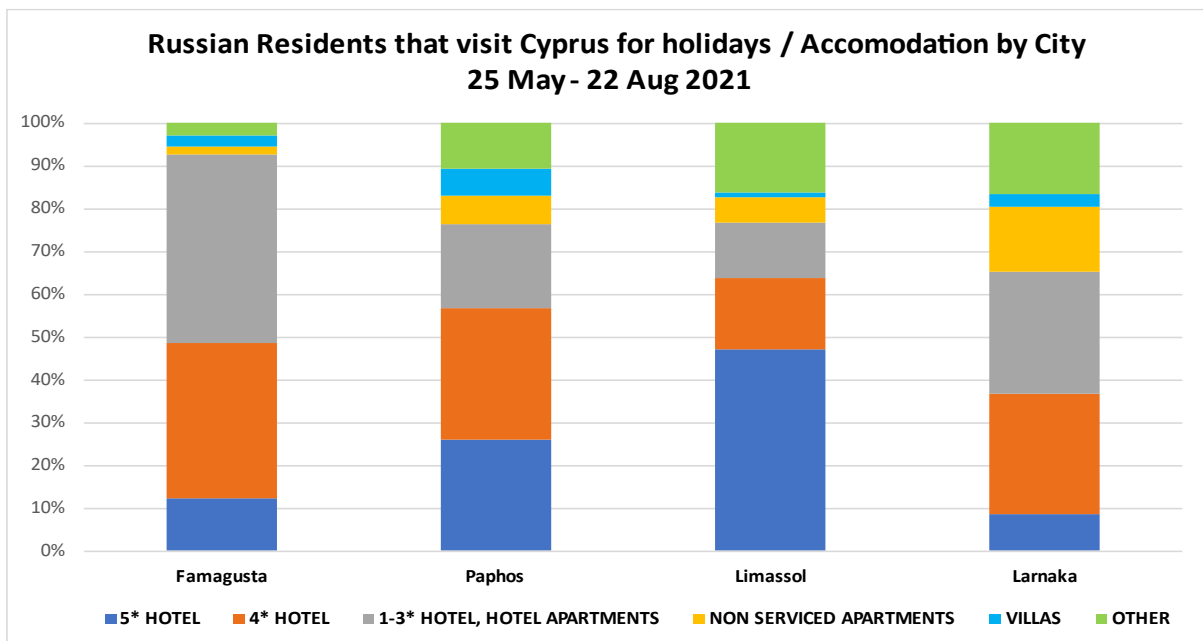
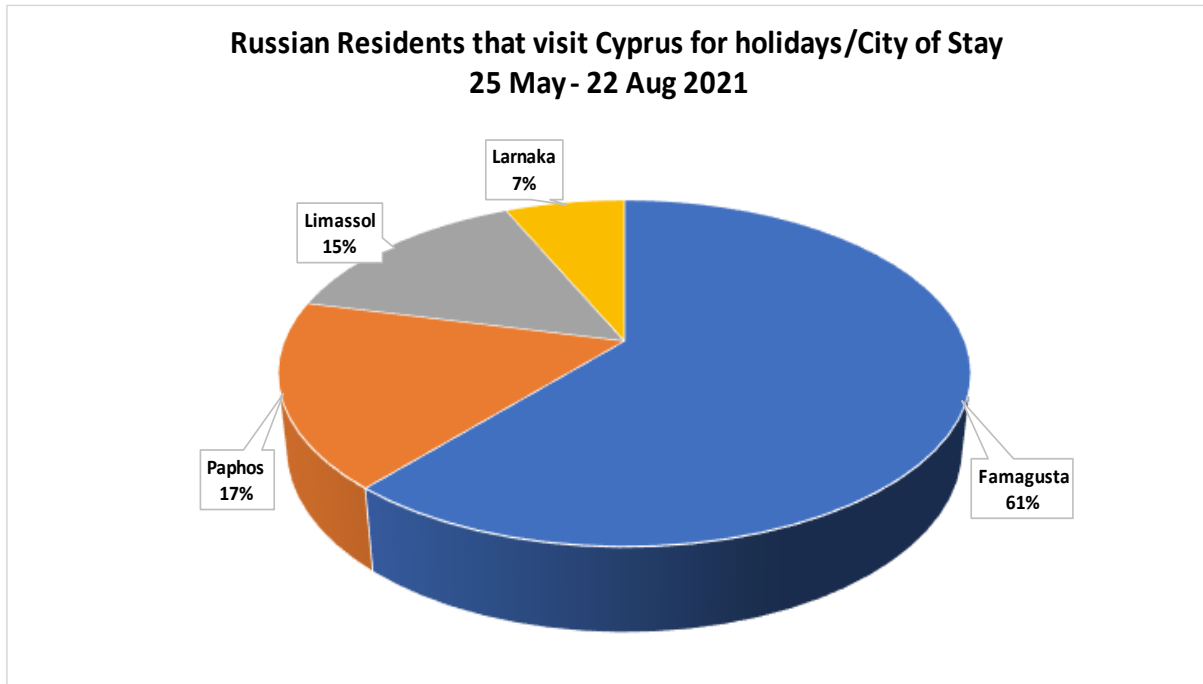


Most travelers chose Famagusta district for accommodation (47%), followed by Paphos (27%), Limassol and Larnaka (12%) and Nicosia (1%).

Graph 6 Type of Accommodation by City for Holiday Visitors

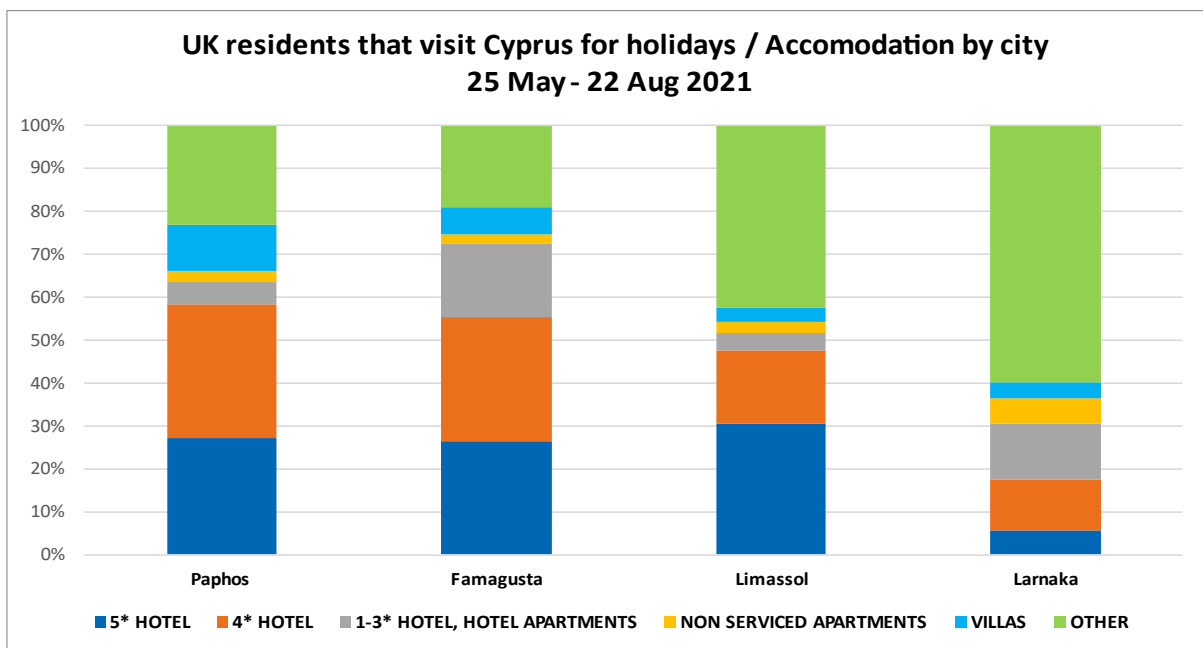
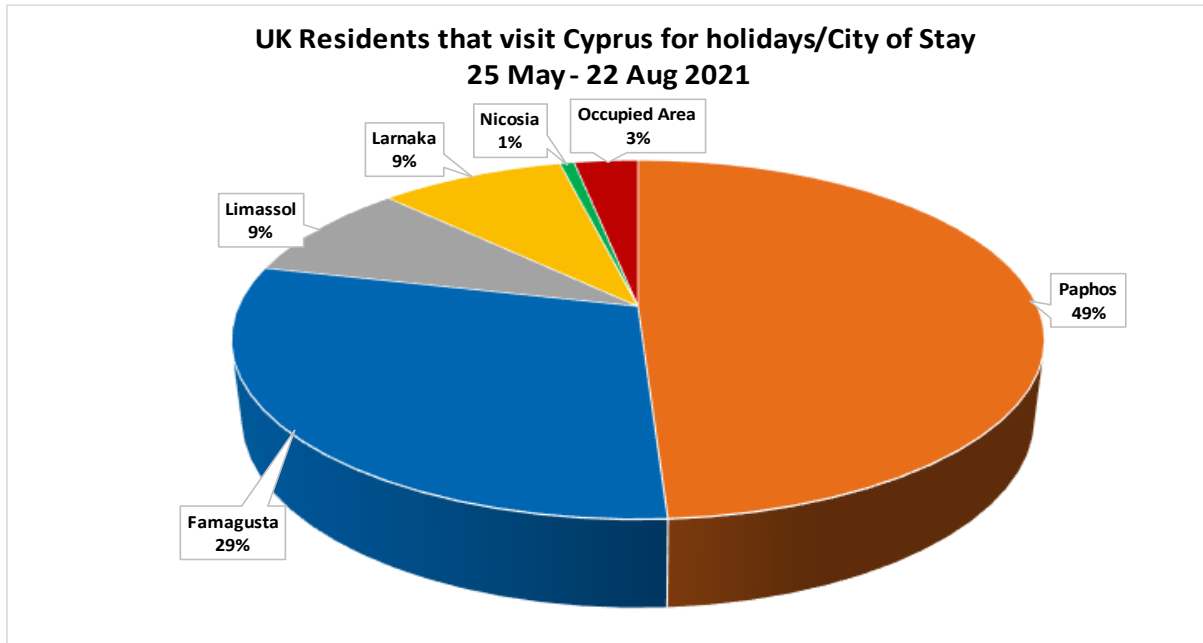


Graphs 7 & 8 The city of stay and accommodation chosen by Russian Residents (Holidays)



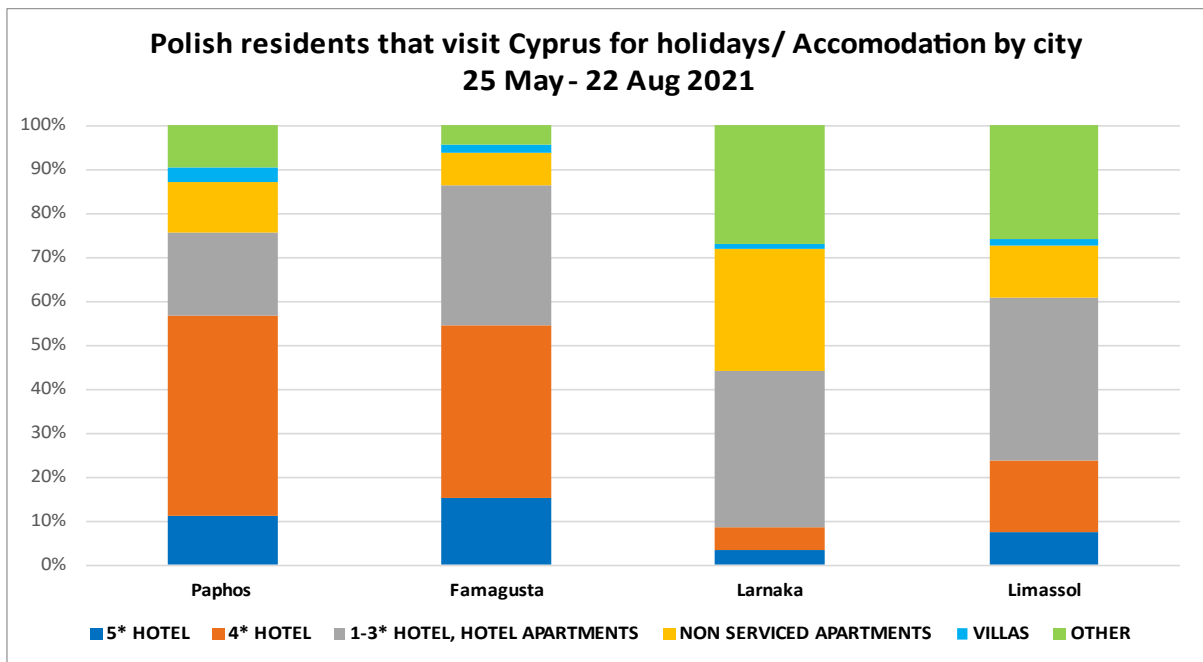
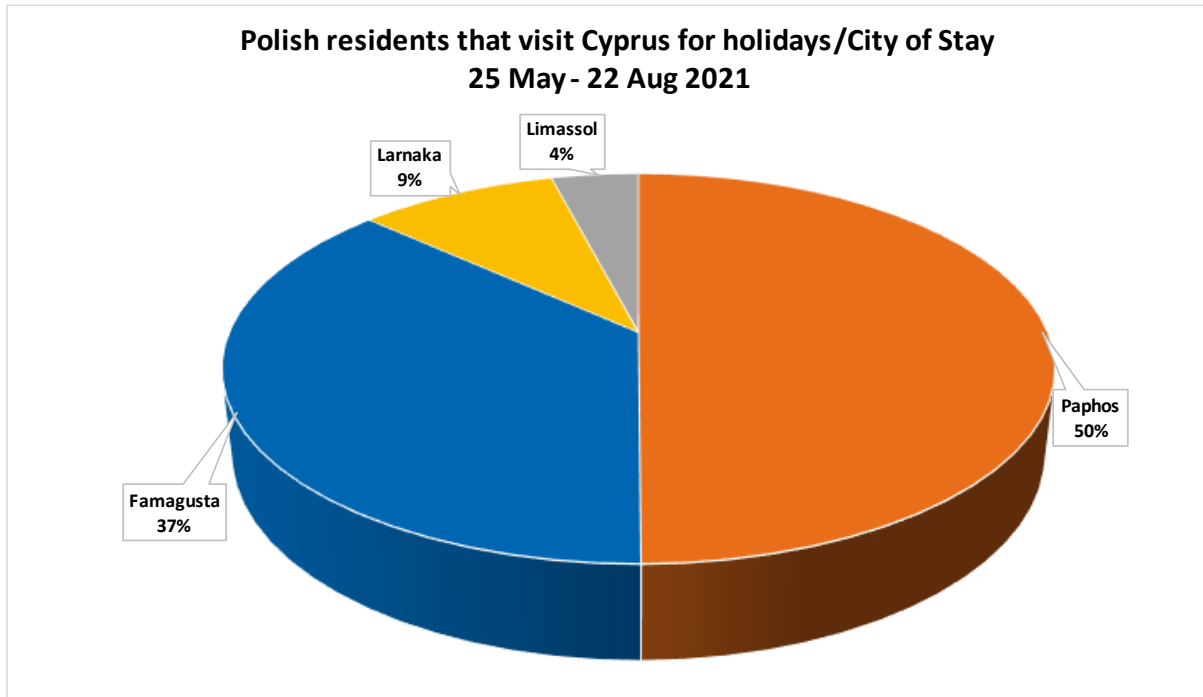
Most Russian passengers chose Famagusta district for accommodation. Their next choice was Paphos, Limassol and lastly Larnaka.

Graphs 9 & 10 – The city of stay and accommodation chosen by UK Residents (Holidays)



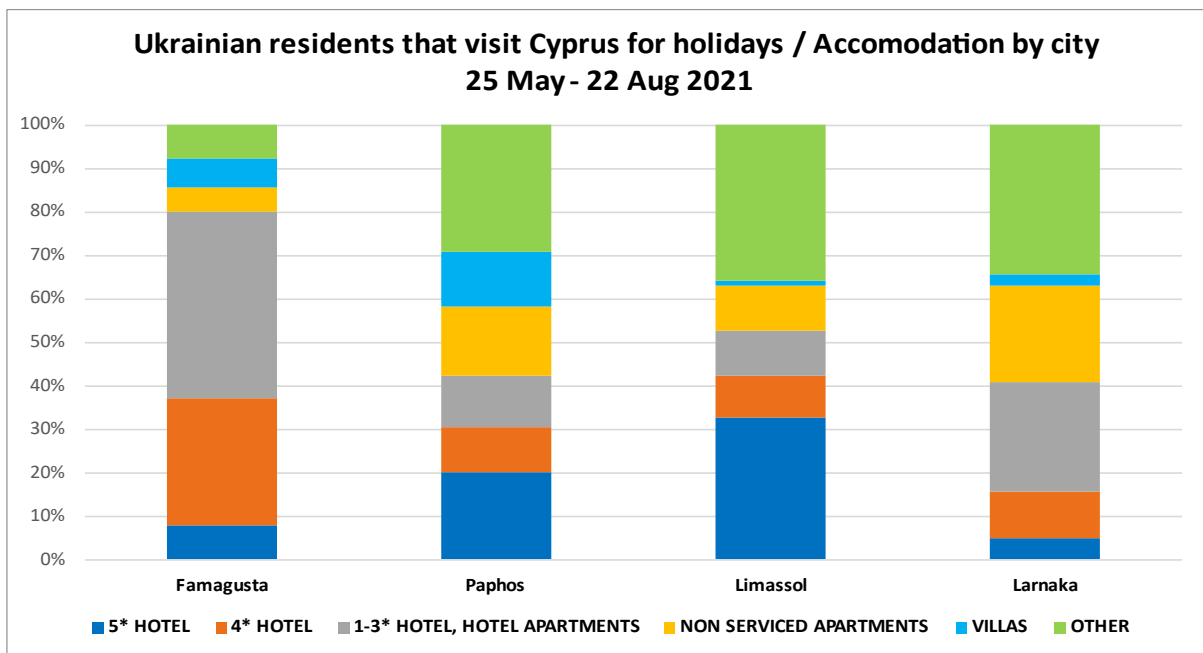
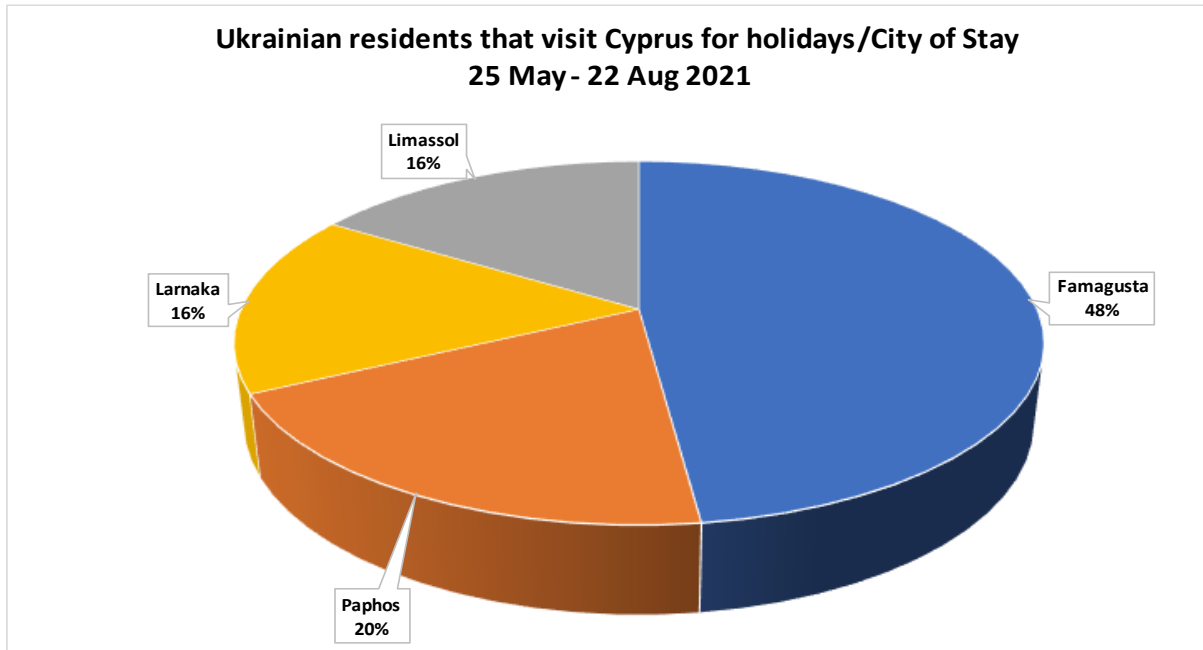
The majority of UK Residents chose Paphos and mostly 4* & 5* hotels. The 29% of UK Residents stayed in Famagusta, 9% in Limassol and 9% in Larnaka while 3% stayed in the occupied areas.

Graphs 11 & 12– The city of stay and accommodation chosen by Polish Residents (Holidays)



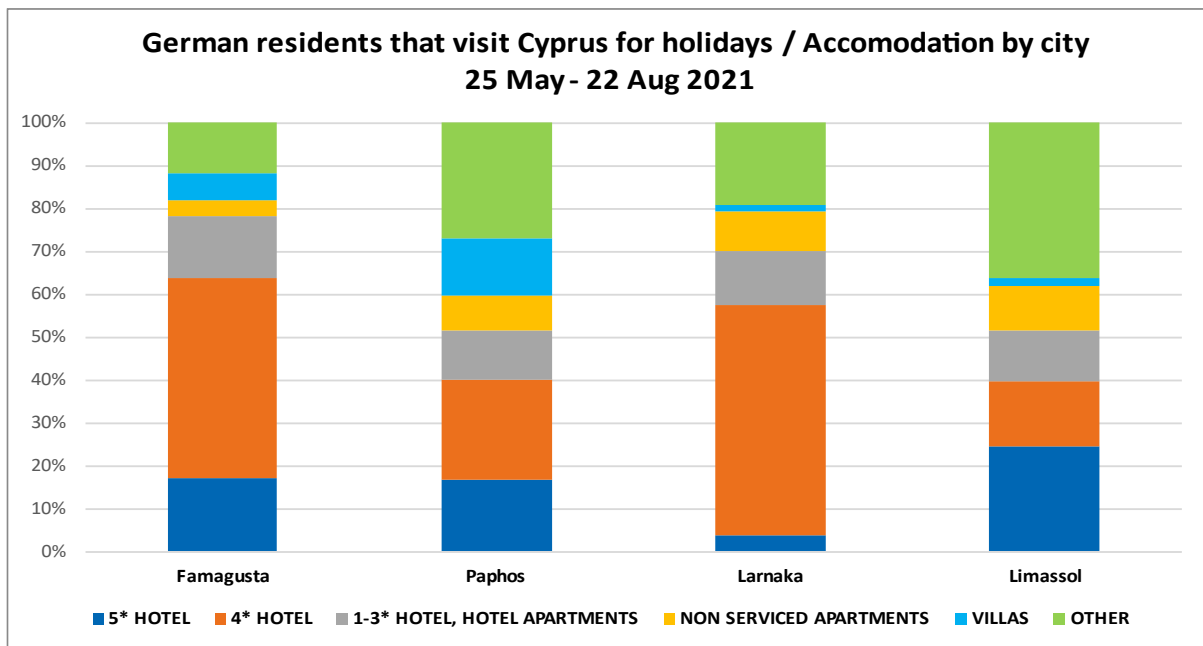
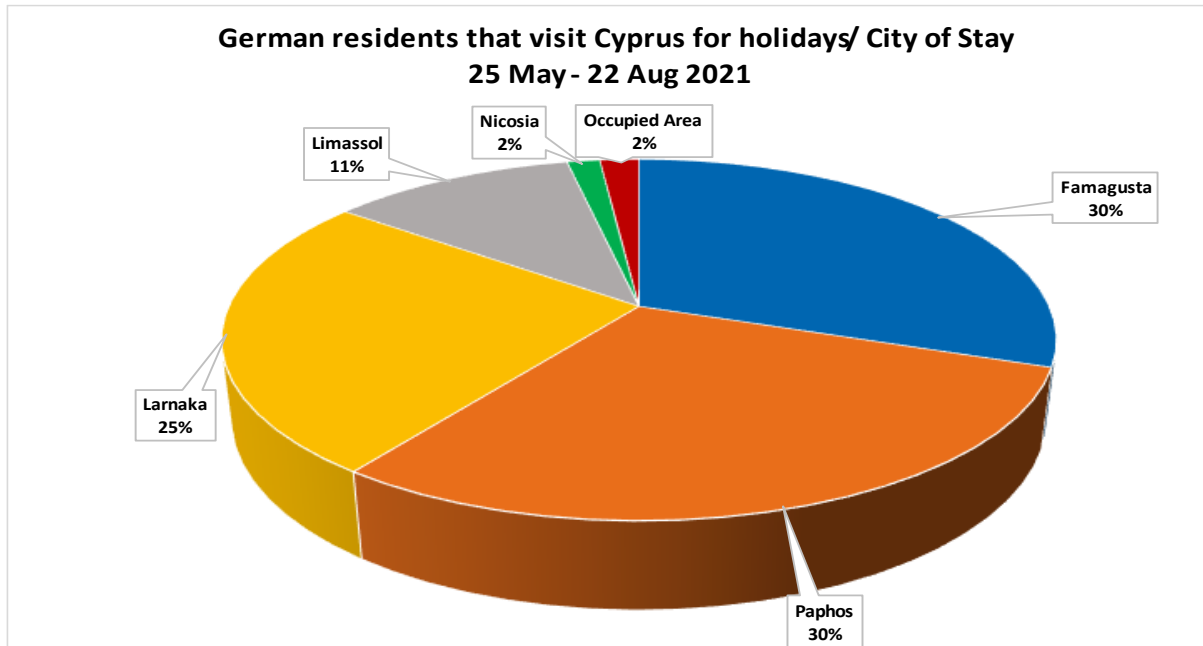
Visitors from Poland were the third largest group of tourists that preferred to visit our country, recording an increase in market share reaching 8% (in relation to 2019 when it was at 2%). This is a result of increased connectivity to and from Poland with more than 10 different routes. Most Polish Residents chose Paphos (50%), followed by Famagusta, Larnaka and Limassol.

Graph 13 & 14 – The city of stay and accommodation chosen by Ukrainian Residents (Holidays)



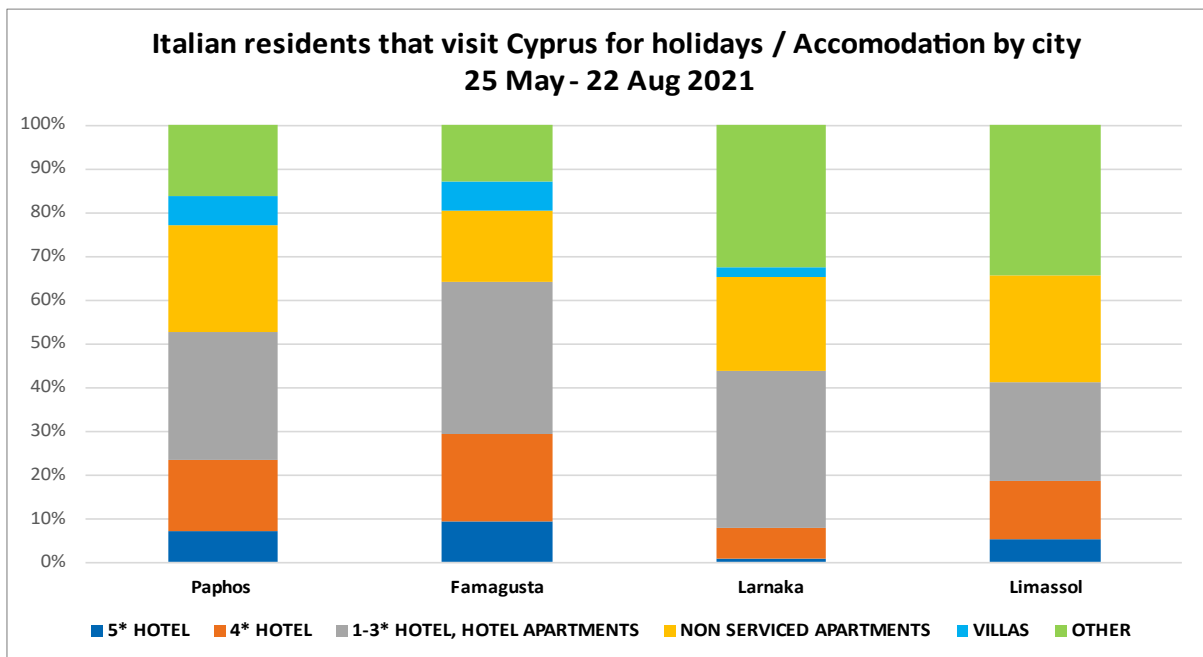
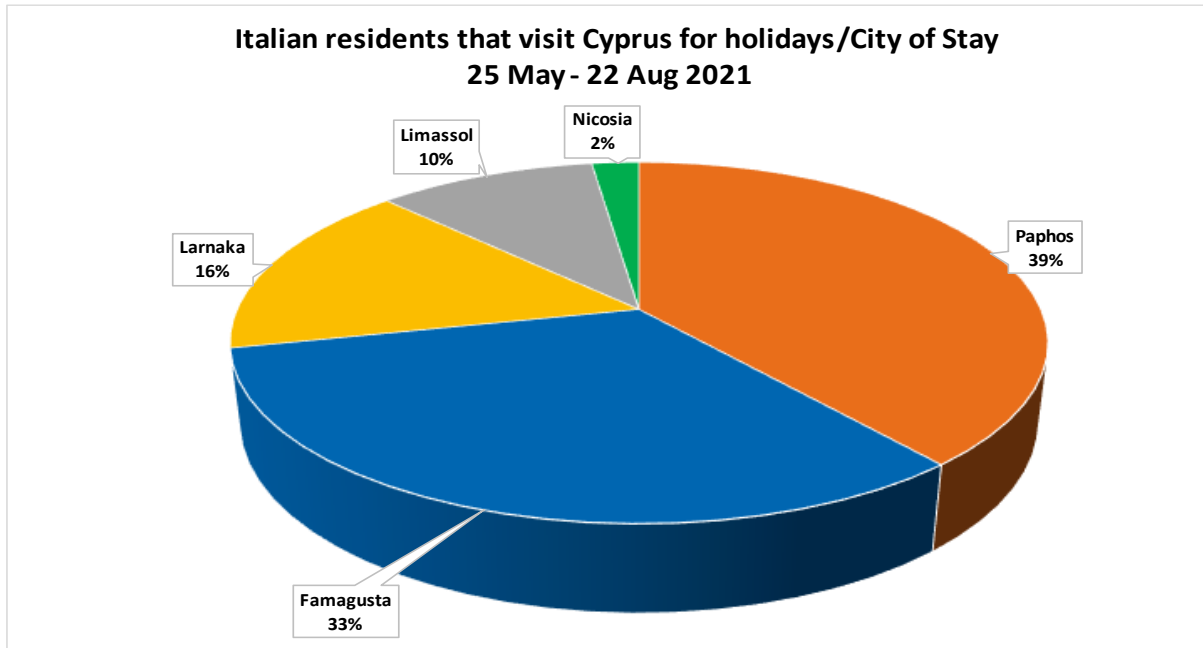
The 48% of tourists from Ukraine chose Famagusta district for accommodation, 20% Paphos, 16% Larnaka and Limassol.

Graph 15 & 16 – The City of Stay and Accommodation chosen by German Residents (Holidays)



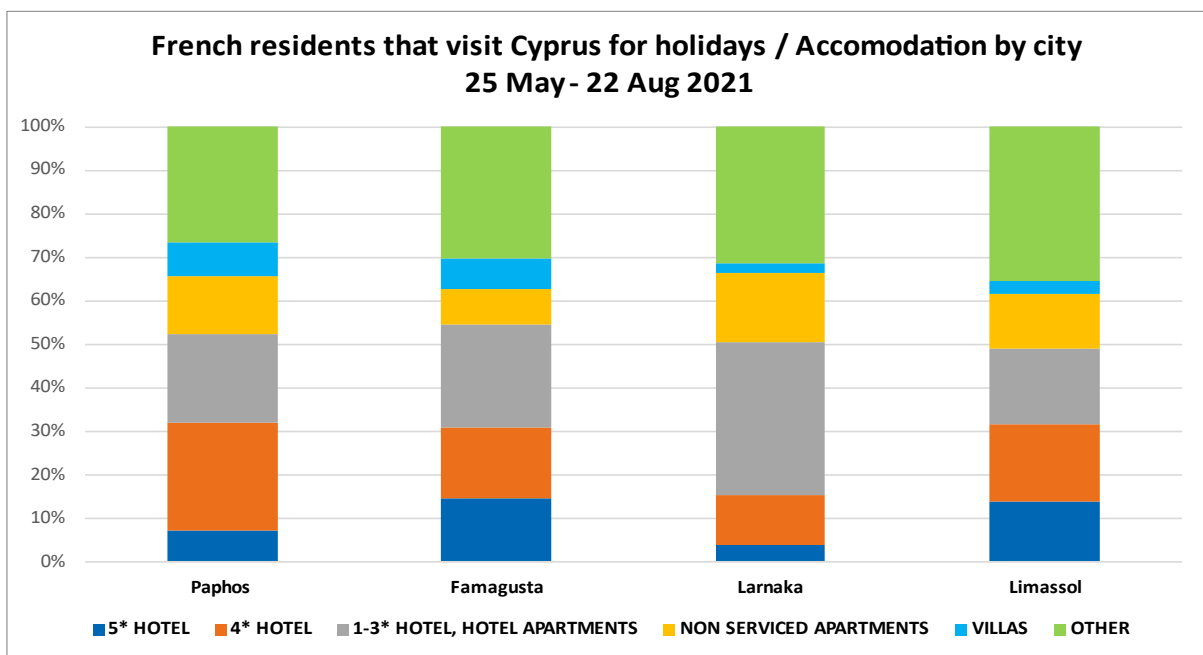
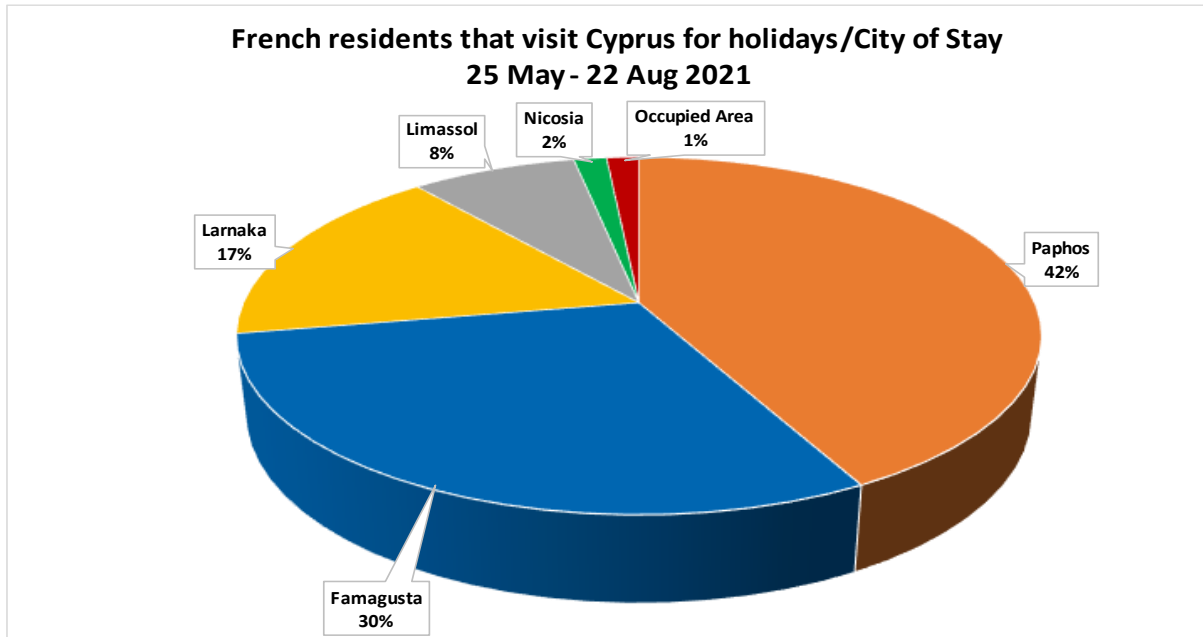
German tourists were equally split between Famagusta district and Paphos, while a significant percentage stayed in Larnaka.

Graph 17 & 18 – City of Stay for Italian Residents (Holidays)



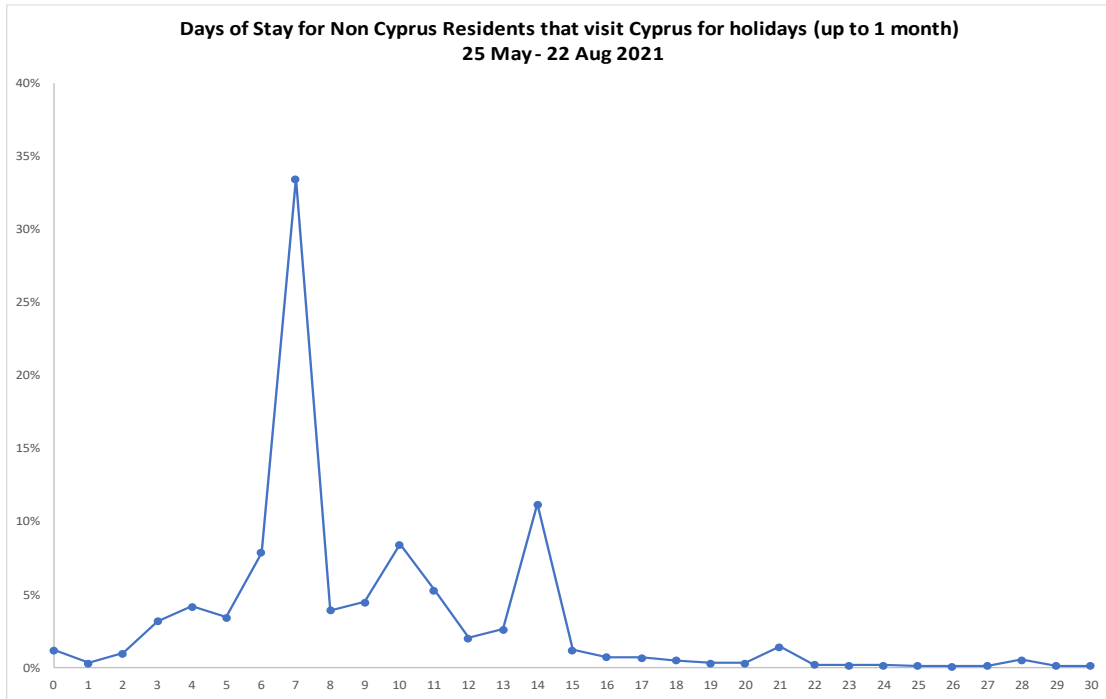
This year we had a substantial increase in flights to and from Italy for the first time, which created a tourist flow that shows a different demographic profile with a tendency towards more affordable accommodation.

Graph 19 & 20 – City of Stay for French Residents (Holidays)



Arrivals from France had always been a challenge for Cyprus tourism. This year, despite the adversities deriving from the pandemic, there are direct flights to Larnaka and Pafos airports from French airports, with 42% of tourists choosing Paphos as their city of stay, 30% Famagusta, 17% Larnaka, 8% Limassol, 2% Nicosia and 1% the occupied areas. A different profile is also observed here regarding the accommodation types, as most visitors prefer affordable accommodation. Same challenges and opportunities apply as in the case of Italy.

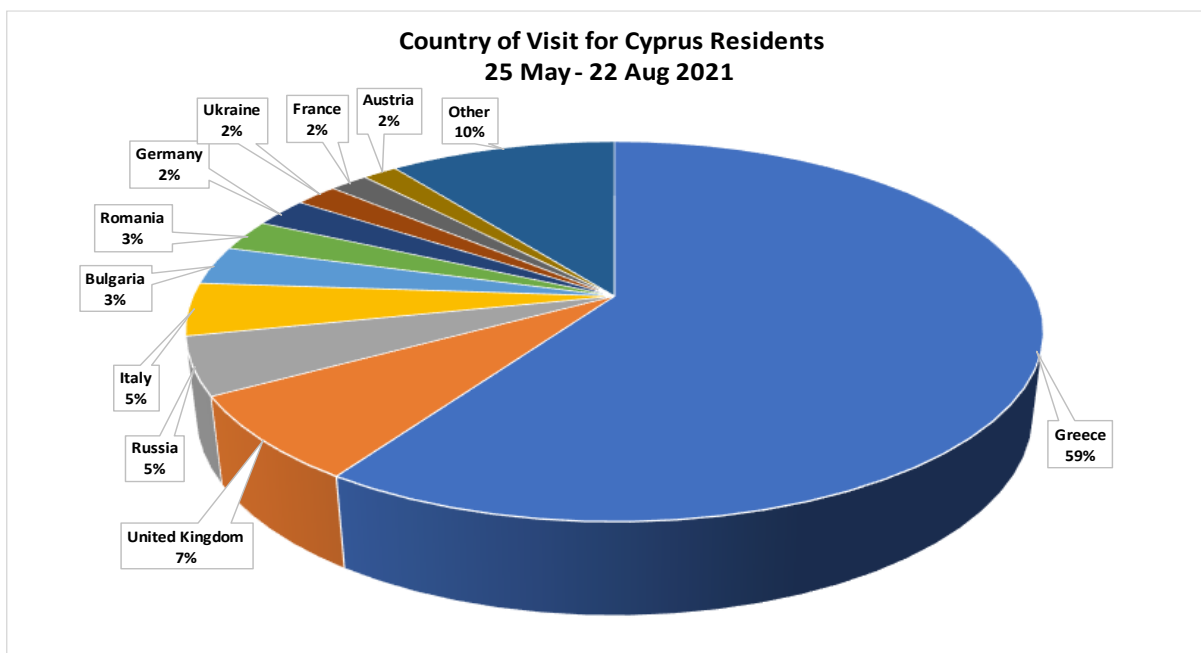
Graph 21 Days of Stay for Holiday Visitors



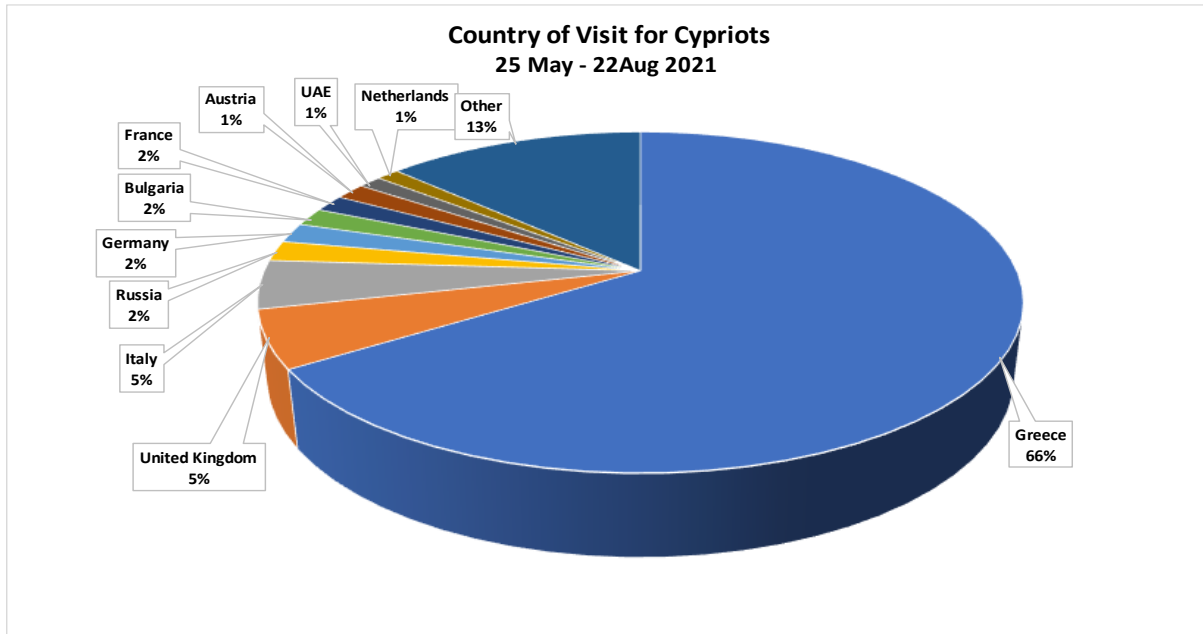
During this period, most tourists stayed in Cyprus for 7 days (33%), while approximately 11% stayed for 14 days. The fact that approximately 20% stayed for a period of up to 6 days is also worth noticing, as it may lead to a trend in short escapes.

Outbound travels from Cyprus

Graph 22 – Cyprus Residents’ travels during the summer period

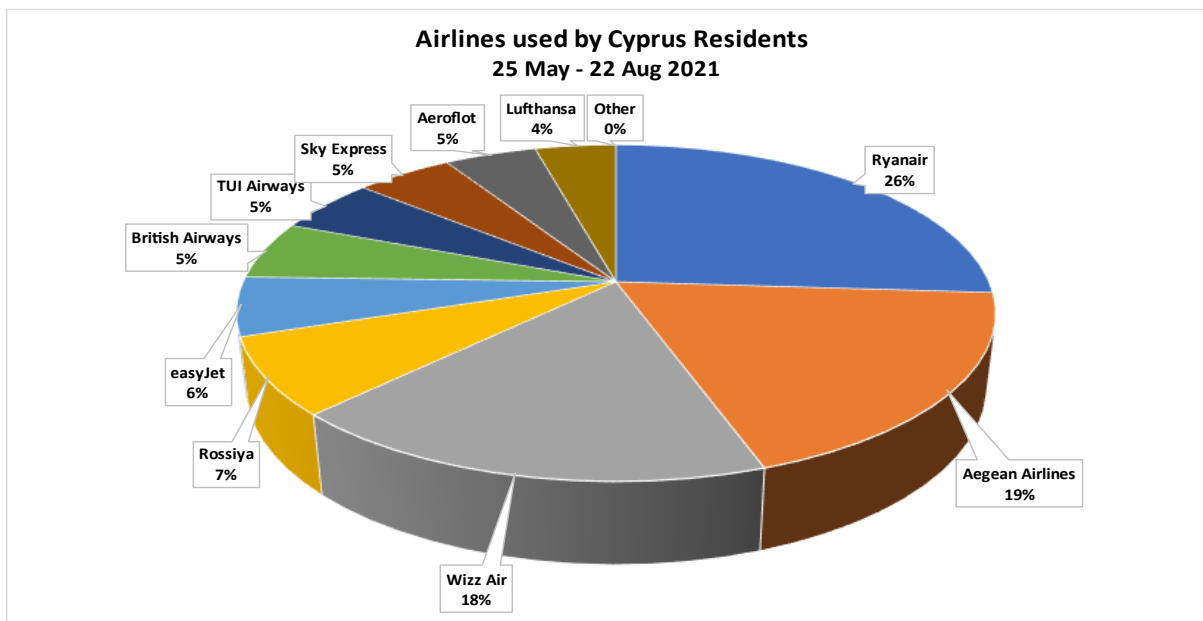


Graph 23 –Travels by Cypriots during the summer period



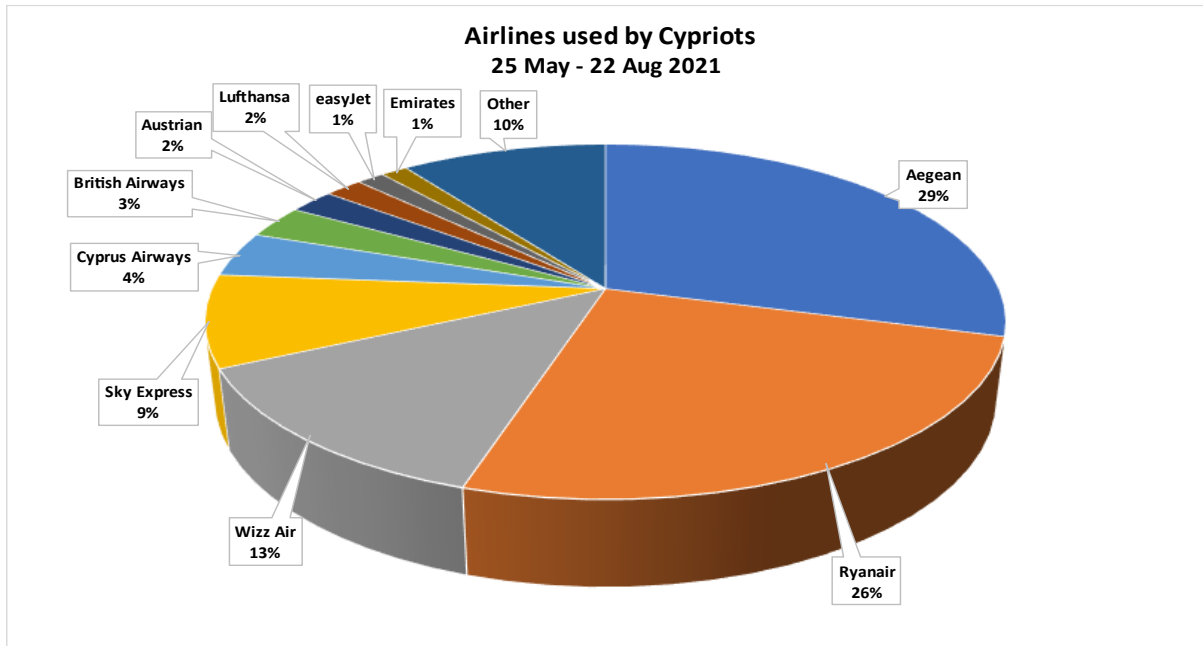
In the above graphs there is a slight differentiation in relation to Cyprus Residents and Cypriots especially in their preference for travels to Greece, which remains a favorite destination for them.

Graph 24 Airlines used by Cyprus Residents



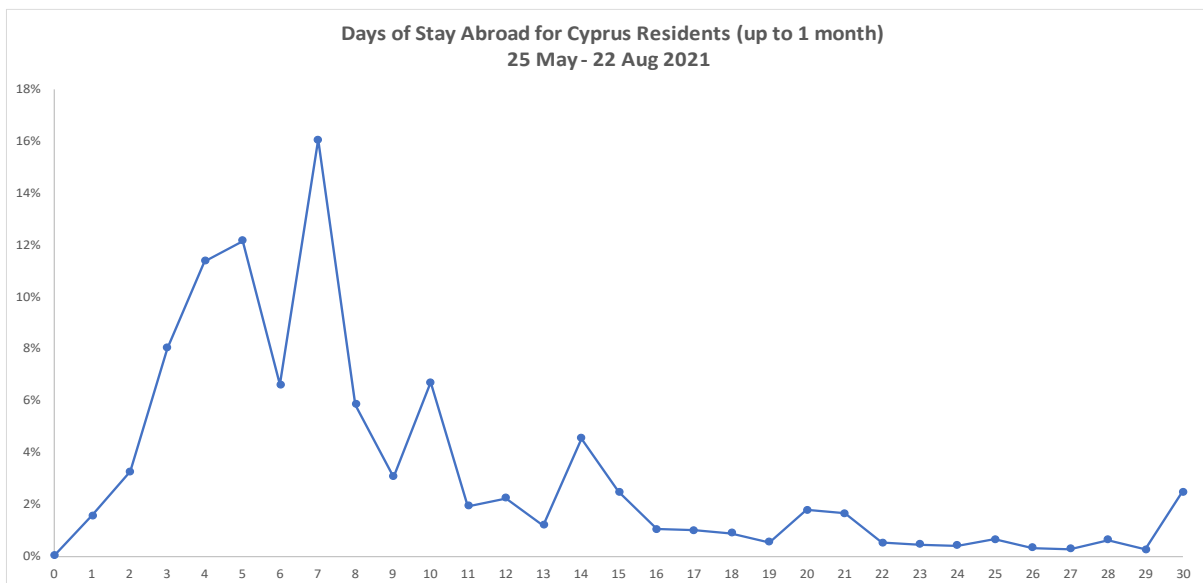
Most Cyprus Residents chose Ryanair (26%) for their travels, followed by Aegean Airlines (19%), Wizz Air (18%), Rossiya (7%), easyJet (6%), British Airways (5%), TUI Airways (5%), Sky Express (5%), Aeroflot (5%) and Lufthansa (4%).

Graph 25 Airlines used by Cypriots



Cypriots chose Aegean Airlines (29%) for their travels, followed by Ryanair (26%), Wizz Air (13%), Sky Express (9%), Cyprus Airways (4%), British Airways (3%), Austrian (2%), Lufthansa (2%), easyJet (1%), Emirates (1%).

Graph 26 Days of Stay abroad for Cyprus Residents



Conclusion/Findings

Despite the pandemic, this year's summer period revealed a confidence in Cyprus as a destination, and in fact there is the possibility to expand in existing and new markets as even though visitors are reduced, during the past 12 months more than 30 new routes have been added at the two airports.

The decrease in the days of stay for holidays appears to be a trend that affects not only Cyprus; however, it provides the opportunity to attract individual travelers for short stay escapes in more frequent intervals.

The efforts to focus on other markets than the two largest ones, namely the United Kingdom and Russia, could continue without underestimating the substantial contribution of these two markets during this difficult period. This year has shown that Cyprus can be a choice for visitors from other markets, which can be achieved through targeted campaigns, collaboration between stakeholders, and incentives to increase connectivity.

Based on the current planning, the forthcoming winter period shows positive signs with some airlines scheduling a significant number of flights. It is up to all of us to make use of these opportunities and support demand and make another step towards recovery.

Notes to Media:

- Hermes Airports Ltd manages and controls the two International Airports of the Republic of Cyprus. The consortium is composed of a mix of Cypriot and international partners.
- It is estimated that for every additional flight arriving at Cypriot airports, around 100 additional job positions are created. Larnaka and Pafos International Airports are responsible for a total of over 18.000 job positions both in the airports and Cyprus' tourism industry in general. With an annual contribution to the country's finances around 4% of Cyprus' GDP, the island's two airports are rightfully considered as an important driving force for Cyprus' growth and the preservation of thousands of jobs.
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