

A long-exposure photograph of a city street at night, likely in Tokyo. The street is filled with light trails from cars, creating a sense of motion. In the background, the Tokyo Tower is illuminated and stands out against the dark sky. The surrounding buildings are lit up, and the overall atmosphere is vibrant and urban.

Top 20 Unserved Airline Routes to Europe

Where is 2026 Untapped Demand?

vorsee

These insights were generated by asking Vorsee™ ActionOS to identify high-potential routes into European airports currently lacking direct connectivity.

Routes were ranked through a composite analysis of recent and predictive flight intent, flight intent growth, and flight booking volumes (*sources).

Our methodology incorporates both inbound and outbound demand flows to better assess end-to-end route profitability.

Finally, the analysis isolates “Truly Unserved” markets, filtering out temporary or seasonal gaps to focus on structurally underserved opportunities.

*Vorsee global aggregated flight search, and global flight bookings.

↑ Singapore to Madrid

Flight intent (indexed) 98.1

Flight passengers (indexed) 92.5

Flight intent YoY growth 139%

Flight intent recent growth 40%



2 Moscow to Tivat

Flight intent (indexed) 93.4

Flight passengers (indexed) 88.8

Flight intent YoY growth 71%

Flight intent recent growth 73%



3 Vancouver to Rome

Flight intent (indexed) 94.9

Flight passengers (indexed) 94.4

Flight intent YoY growth 11%

Flight intent recent growth 155%



4 Islamabad to Milan

Flight intent (indexed) 94.7

Flight passengers (indexed) 99.4

Flight intent YoY growth 40%

Flight intent recent growth 34%



5 Seoul to Brussels

Flight intent (indexed) 95.9

Flight passengers (indexed) 91.2

Flight intent YoY growth 36%

Flight intent recent growth 34%



6 Kochi to Frankfurt

Flight intent (indexed) 97.6

Flight passengers (indexed) 98.7

Flight intent YoY growth 9%

Flight intent recent growth 33%





7 Lahore to Milan

Flight intent (indexed) 93

Flight passengers (indexed) 99.6

Flight intent YoY growth 7%

Flight intent recent growth 42%



8 Tokyo to Geneva

Flight intent (indexed) 96.4

Flight passengers (indexed) 98.5

Flight intent YoY growth 10%

Flight intent recent growth 34%



9 Jakarta to Frankfurt

Flight intent (indexed) 98

Flight passengers (indexed) 90.7

Flight intent YoY growth 39%

Flight intent recent growth 29%



10 Tokyo to Barcelona

Flight intent (indexed) 99.8

Flight passengers (indexed) 99.7

Flight intent YoY growth 55%

Flight intent recent growth 19%



Rank Route (Round trip)

- 11 Singapore to Geneva
- 12 Moscow to Chisinau
- 13 Seoul to Dusseldorf
- 14 Hanoi to Warsaw
- 15 Riyadh to Lisbon
- 16 Melbourne to London
- 17 Manila to Athens
- 18 St. Petersburg to Budapest
- 19 Singapore to Dublin
- 20 Tokyo to Bucharest



Routes such as Hanoi–Warsaw demonstrate strong inbound demand into Europe, but comparatively weaker return traffic.

Meanwhile, strategic markets like Seoul–Brussels and Tokyo–Geneva only emerge in our Two-Way ranking — highlighting balanced, high-quality demand flows that are critical for long-term airline profitability.

#1 Singapore — Madrid

The clear winner across both datasets.

This route is currently the #1 most underserved connection to Europe.

With high search volume, proven booking conversion on indirect flights, and a balanced bidirectional flow, it represents a "plug-and-play" opportunity for any carrier with the right fleet and market presence.

Is your network optimised
for 2026 demand? Ask our AI Agent.

Find out which untapped markets are waiting
for you. Meet our team at Routes Europe,
Stand G50.

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