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Holiday season improvements in passenger traffic "*cannot be called a recovery*" says airport body, as gradual gains already plateau across Europe

Brussels, 17 September 2021: European airport trade body, ACI EUROPE, today released its air traffic report for July 2021, as well as preliminary data for the month of August.

The report shows that passenger traffic in the **European airport network** decreased by **-49.3%** in July compared to the same period pre-pandemic (2019) - a significant improvement compared to previous months (-74% in Q2 2021). Total passenger volumes more than doubled during the month compared to July 2020 – at **133.4 million** up from 57.4 million.

While airports in the **EU+ area**[1] kept underperforming the European average in July at **-56.1%**, the improvement over Q2 2021 (-81%) was also significant. This reflected the role of the EU Digital Covid 19 Certificate, alongside the easing of travel restrictions in many countries.

There were significant variations between national markets across the EU+ area – due to a mix of factors including diverse epidemiological situations, uneven efforts made by Governments to ease travel restrictions, the size of domestic markets and some countries benefitting from tourism/VFR traffic more than others. Accordingly, the best performance came from Romania (-32.6%), Greece (-33.3%), Luxembourg (-44.5%) and France (-46.2%), while Finland (-81.9%), Ireland (-81.7%), the UK (-81.2%) posted the sharpest declines. Germany (-60.8%) also underperformed the EU+ area average.

Meanwhile, airports in the **rest of Europe**[2] saw passenger traffic decreasing by just **-20.3%** in July – reflecting a complete recovery of domestic passenger traffic (+10.3%) as well as less severe restrictions for cross-border travel.

Amongst national markets, Kosovo (+21.4%) and Albania (+9.6%) exceeded pre-pandemic (2019) volumes. Uzbekistan (-8.3%). Bosnia Hercegovina (-13.2%), Armenia (-15.7%) and Russia (-16.4%) significantly outperformed the bloc's average, while Turkey (-25.5%) and Ukraine (-25.1%) did not.

CDG AND AMS RETURN TO TOP 5

In the first half of the year, the 5 busiest airports came from Russia and Turkey. July saw **Paris-CDG** (-58.9%) and **Amsterdam-Schiphol** (-54.9%) rejoining the top 5 league in 4th and 5th position respectively. **Istanbul** (-34.7%) remained in the top spot, followed by **Antalya** (-27.9%) and **Moscow Sheremetyevo** (-30.4%).

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[1] EU/EEA, Switzerland and the UK

[2] Albania, Armenia, Belarus, Bosnia and Herzegovina, Georgia, Israel, Kosovo, Moldova, Montenegro, North Macedonia, Russian Federation, Serbia, Turkey, Ukraine, Uzbekistan.

EU+ HUBS AND LARGER AIRPORTS UNDERPERFORMING

More generally **EU+ hubs and larger airports** significantly underperformed in July due to the permanence of tight restrictions on international travel beyond Europe. This dragged the performance of **Group 1 airports**[3] down to **-55.6%**.

In particular, Frankfurt (-58.9%) only ranked 7th busiest European airport, Madrid 9th (-57%), London-Heathrow 16th (-80.5%), Munich 18th (-69.2%), Stockholm-Arlanda 39th (-64.8%), Dublin 48th (-81%) and London-Gatwick 64th (-89.6%).

Only a few large airports relying on leisure and domestic traffic posted significantly better results with Palma de Mallorca ranked 10th (-42.2%), Paris-Orly 13th (-35.4%) and Athens 15th (-37.8%).

INSULAR AIRPORTS & LCC BASES DOING BEST

Conversely, **mid-size and smaller airports** tended to fare better in July, a result of their higher reliance on domestic and intra-European leisure traffic. Accordingly, **Group 3**[4] and **Group 4**[5] airports saw passenger traffic decreasing by **-38%** and **-34.2%** respectively.

Apart from Sochi (+68.2%) standing out with impressive growth over pre-pandemic (2019) levels and ranking amongst the top 20 European airports, the best results mostly came from **insular airports serving popular tourist destinations**. These included Ajaccio (+10%), Calvi (+3.9%), Bastia (-6.6%), Santorini (-13.2%) Palermo (-14.2%), Olbia (-14.9%), Mikonos (-17%), Tenerife (-20%), Menorca (-23.4%), Cagliari (-23.7%) and Heraklion (-25.2%).

Secondary airports predominantly catering to low cost carriers also posted lower traffic declines: Paris-Beauvais (-25.2%), Brussels-South Charleroi (-31%), Rome-Ciampino (-33.6%) and Milan-Bergamo (-36.2%).

FREIGHT & AIRCRAFT MOVEMENTS

Freight traffic across the European airport network increased by **+4.3%** in July compared to pre-pandemic (2019) levels, but was up +23.7% from the same period last year.

Aircraft movements were down by **-36.5%**, with EU+ airports at -41.4% and the rest of Europe at -13% compared to 2019.

FURTHER - BUT SLOWER - IMPROVEMENTS IN AUGUST

Preliminary data for August reveals that passenger traffic in the **European airport network** kept improving but at a slower pace compared to July – with the month closing at **-43%**.

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[3] Airports with more than 25 million passengers per annum pre pandemic (2019)
[4] Airports with 5 to 10 million passengers per annum pre pandemic (2019)
[5] Airports with less than 5 million passengers per annum pre pandemic (2019)

Noticeably, the improvement in August all came from the **EU+ market** at **-49%** - although this was mainly driven by UK and Irish airports following the partial lifting of travel restrictions in these countries, as well as further gains in the Eastern part of the bloc. Most other EU+ markets remained at their July levels.

Meanwhile passenger traffic in the **rest of Europe** stood at **-21%**, showing no further increase compared to July.

Olivier Jankovec, Director General of ACI EUROPE commented: *"The easing of travel restrictions for intra-European travel and the EU Digital Covid Certificates have allowed passenger traffic to finally improve across Europe, giving airports some oxygen over the months of July and August. But make no mistake, this cannot be called a recovery. We are still 66% below pre-pandemic volumes so far this year*[6] *- and the improvement has predominantly benefitted smaller airports relying on domestic and leisure traffic. As we have exited the peak Summer holiday period, passenger traffic is no longer improving in many markets. In fact, it is plateauing and even decreasing again, with business travellers not there to take over from holiday makers. Of course, this is due to travel regimes which still remain unaligned with restrictions and conditions difficult to navigate. But beyond obvious demand factors, supply issues are also starting to holding back further progress. Air connectivity remains very much degraded across Europe - this is acutely felt in the business travel sector in particular."*

He added: *"We are anxiously waiting for the UK to reconsider its current restrictions and further ease cross-border travel. This should finally allow UK airports to close the gap with the rest of the industry but would also benefit airports in many other European markets. And crucially, we need to do away with restrictions to international travel for fully vaccinated travellers both within and beyond Europe. The transatlantic market and EU neighbouring countries are absolute priorities in this regard.*

COVID-19 vaccination is proven to be highly effective against hospitalisation and death. This has completely changed the paradigm of the epidemiological situation and related risks. Yet, by relying predominantly on infection rates, the criteria used to assess such risks fail to reflect this new reality. This must be urgently addressed – along with a push for the EU COVID-19 Digital Certificate to become the global standard."

[6] Up to 5 September for the European airport network, with the EU+ area underperforming at -74%.

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ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents over 500 airports in 55 countries. Our members facilitate over 90% of commercial air traffic in Europe. Air transport supports 13.5 million jobs, generating €886 billion in European economic activity (4.4% of GDP). In response to the Climate Emergency, in June 2019 our members committed to achieving Net Zero carbon emissions for operations under their control by 2050, without offsetting.