Latest traffic data, revised forecasts and Connectivity Report published on eve of ACI EUROPE Annual Congress

ACI EUROPE
10 Rue Montoyer (Box 9)
1000 Brussels, Belgium
www.aci-europe.org

***Brussels and Geneva, 25 October 2021*:** On the eve of ACI EUROPE's 31st Annual Congress and General Assembly, the airport association has set the scene with the release of its latest traffic data, revised forecasts, and the publication of the Airport Industry Connectivity Report 2021.

PASSENGER TRAFFIC DEVELOPMENTS

Europe's airports have lost **1.26 billion passengers** so far this year[1] - a decrease of **-62%** compared to pre-pandemic (2019) levels**.**

The continent is a strikingly two-speed aviation market:

- **EU+ airports**[2] stand at **-69%** so far this year against 2019, with overall passenger volumes essentially flat compared to last year.
  The peak Summer months **(Q3)** saw a significant improvement at **-50%** compared to 2019, as travel restrictions eased and the EU Digital Covid Certificate enabled cross-border travel. Airports in the UK (-71%), Ireland (-68%) and Finland (-78%) underperformed due to a much slower easing of travel restrictions by their Governments.

- **Airports in the rest of Europe** have achieved a significant recovery at **-34%** so far this year against 2019, with passenger volumes up by +70% compared to 2020.
  Q3 stood at **-21%**, driven by continued improvement at Russian and Turkish airports.

A closer look at the data shows that the pace of the recovery has not yet accelerated across the European airport network – with the **first two weeks of October** at **-41%** compared to -43% in September and -41% in August.

UPDATED FORECAST

The updated forecast released by ACI EUROPE today shows the passenger traffic recovery gathering pace in the coming months and into 2022, thanks to the re-opening of the transatlantic market to European travellers as well as a progressive easing of travel restrictions on other long-haul markets - in particular in Asia.

As a result, ACI EUROPE sees passenger traffic at Europe's airports improving from an estimated **-60% this year** to **-32% in 2022** compared to pre-pandemic (2019) volumes. A **full recovery** will be achieved only in **2025** (+1%).

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[1] 1 January 2021 to 18 October 2021.
[2] EU, EEA, Switzerland and the UK.

Olivier Jankovec, Director General of ACI EUROPE commented: *"Fully restoring unconstrained global travel remains a long way off and looks set to be an uneven and volatile process - conditioned by further progress on vaccination and the evolution of the epidemiological situation. The level of pent-up demand is staggering, fuelled by the savings accumulated by consumers through this pandemic. But there are also significant supply pressures that will slow down the pace of the recovery."*

"*These include structurally downsized airlines with significant reductions in their aircraft fleet and workforce, rising fuel costs and inflationary pressures, the lasting impact of airport slot waivers and the fact that capacity disciplined airlines will be exercising pricing power*".

AIR CONNECTIVITY DEVELOPMENTS

The ***2021 Airport Industry Connectivity Report*** released today by ACI EUROPE reveals air connectivity levels still markedly degraded.

While **direct connectivity** out of Europe's airports now stands at **-36%** compared to pre-pandemic levels, **hub connectivity** is still down by **-67%** due to most intercontinental markets remaining subject to tight travel restrictions.

As with passenger traffic, EU+ airports underperform the European average for both indicators. Their direct connectivity stands at -39% and hub connectivity at -71%, while airports in the rest of Europe have achieved -20% and -51% respectively.

The report shows that **smaller and regional airports** (Group 4[3]) have so far recovered their direct connectivity faster than others - reflecting the fact the recovery has so far been predominantly driven by intra-European and domestic leisure traffic as well as Low Cost Carriers (LCCs). As a result the share of direct connectivity provided by **LCCs** at Europe's airports has increased from 34% in 2019 to **39%** this year.

The direct connectivity offered by LCCs is only -10% lower than 2019 levels at smaller and regional airports, but -32% lower at the larger airports (Group 1[4]). Meanwhile, the direct connectivity offered by Full Service Carriers (FSC) is -32% lower than 2019 levels at smaller and regional airports and -42% at the larger airports.

The **Top 20 global hub connectivity league** shows that unlike European airports, US airports have recovered the bulk of their pre-pandemic (2019) hub connectivity - thanks to their reliance on a vast and unconstrained domestic market.

Dallas Fort Worth and ***Denver*** are leading the global ranking this year, having recovered respectively 69% and 90% of their hub connectivity. They are followed by ***Frankfurt****,* ***Atlanta*** and ***Amsterdam-Schiphol***.

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

Istanbul comes in the 6th position, ***Paris-CDG*** in the 10th and ***Doha*** in the 11th - the only Middle Eastern airport in the league - while ***Munich*** ranks 17th and ***London-Heathrow*** 18th.

Jankovec said: *"This year's report shows that as we are learning to live with the virus and economies have re-opened, air connectivity is taking time to come back. Its recovery is far from uniform, with significant differences between the lead indexes as well as between geographical markets and segments within the airport industry. This largely reflects the permanence of travel restrictions and bans on external markets and still not fully aligned travel regimes within Europe."*

He added: *"Looking ahead, there is no doubt that Governments' support to air connectivity and aviation in general will be a defining factor. Restoring air connectivity must go hand in hand with it becoming more sustainable and also more integrated with other transport modes and urban mobility. But there is also no escaping the fact that with no comparable substitute, air connectivity must remain an essential part of the productive capacity of our societies. With every +10% in direct connectivity yielding +0.5% in GDP per capita, that's not something we can turn our backs on"*.

The **ACI EUROPE Traffic Forecast** can be accessed here.

The **Airport Industry Connectivity Report 2021** can be accessed here.

Register to follow the ACI EUROPE 31st Annual Congress here. Accredited press should contact Giulia Scaramucci for the virtual access code.

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For more information, contact:

Virginia Lee
Director, Media & Communications
Tel: +32 2 552 09 82
Email: virginia.lee@aci-europe.org

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.