

COVID-19 & AIRPORTS

Traffic Forecast

Revised Q4 2021, FY 2021 & 2022 Scenarios

13 October 2021



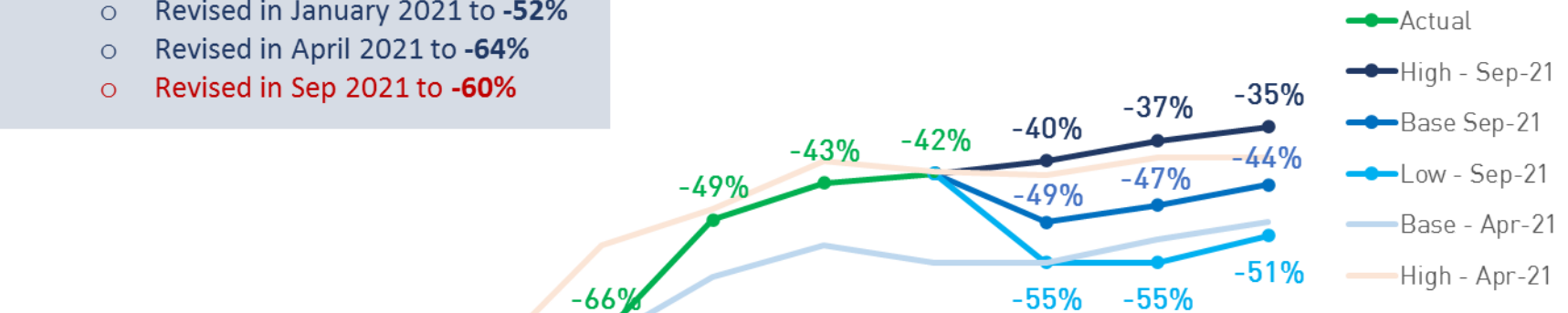
→ Q4 2021: -47% & FY: -60% (vs. 2019)

Airport Passenger Traffic Forecast 2021 (estimated % change compared to same month in 2019)

Jan-21 Feb-21 Mar-21 Apr-21 May-21 Jun-21 Jul-21 Aug-21 Sep-21 Oct-21 Nov-21 Dec-21

Full Year 2021 Traffic Forecast Updates:

- October 2020 Forecast: -48%
- Revised in January 2021 to -52%
- Revised in April 2021 to -64%
- Revised in Sep 2021 to -60%



FY 2021 by Quarter:

- Q1: -81%
- Q2: -74%
- Q3: -45%
- Q4: -47%

-1.5 billion passengers lost in 2021

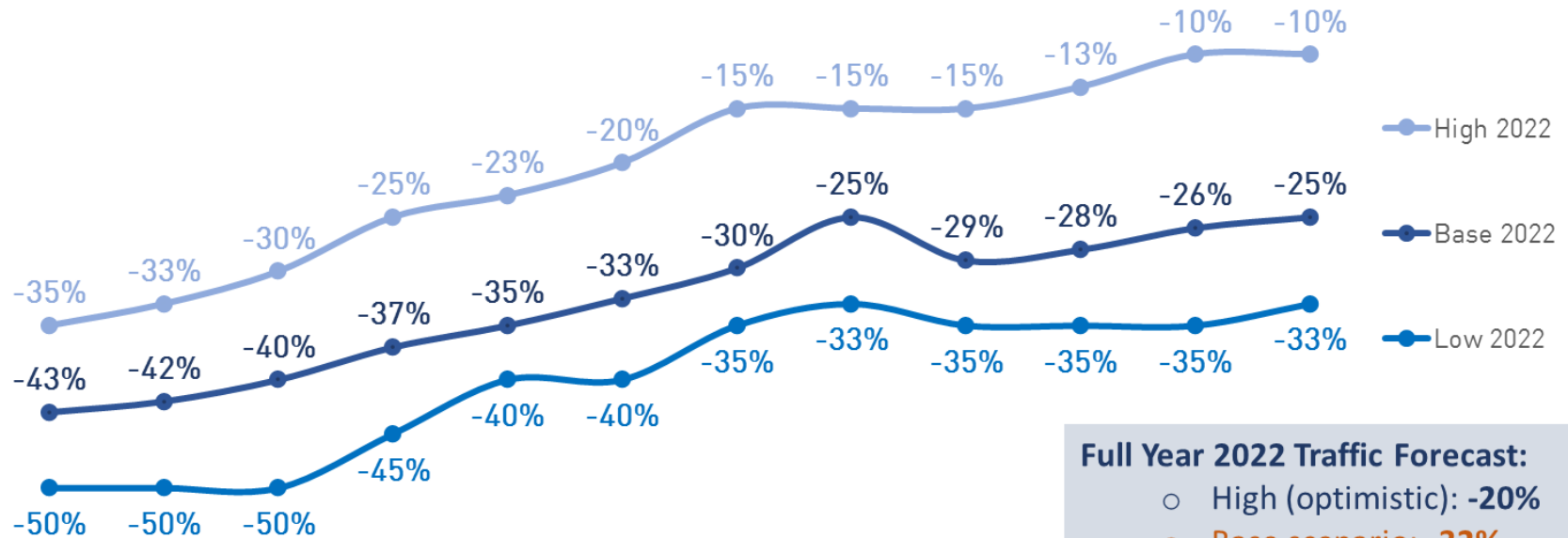


→ FY 2022: -32% (vs. 2019)



Airport Passenger Traffic Forecast 2022 (estimated % change compared to same month in 2019)

Jan-22 Feb-22 Mar-22 Apr-22 May-22 Jun-22 Jul-22 Aug-22 Sep-22 Oct-22 Nov-22 Dec-22



Full Year 2022 Traffic Forecast:

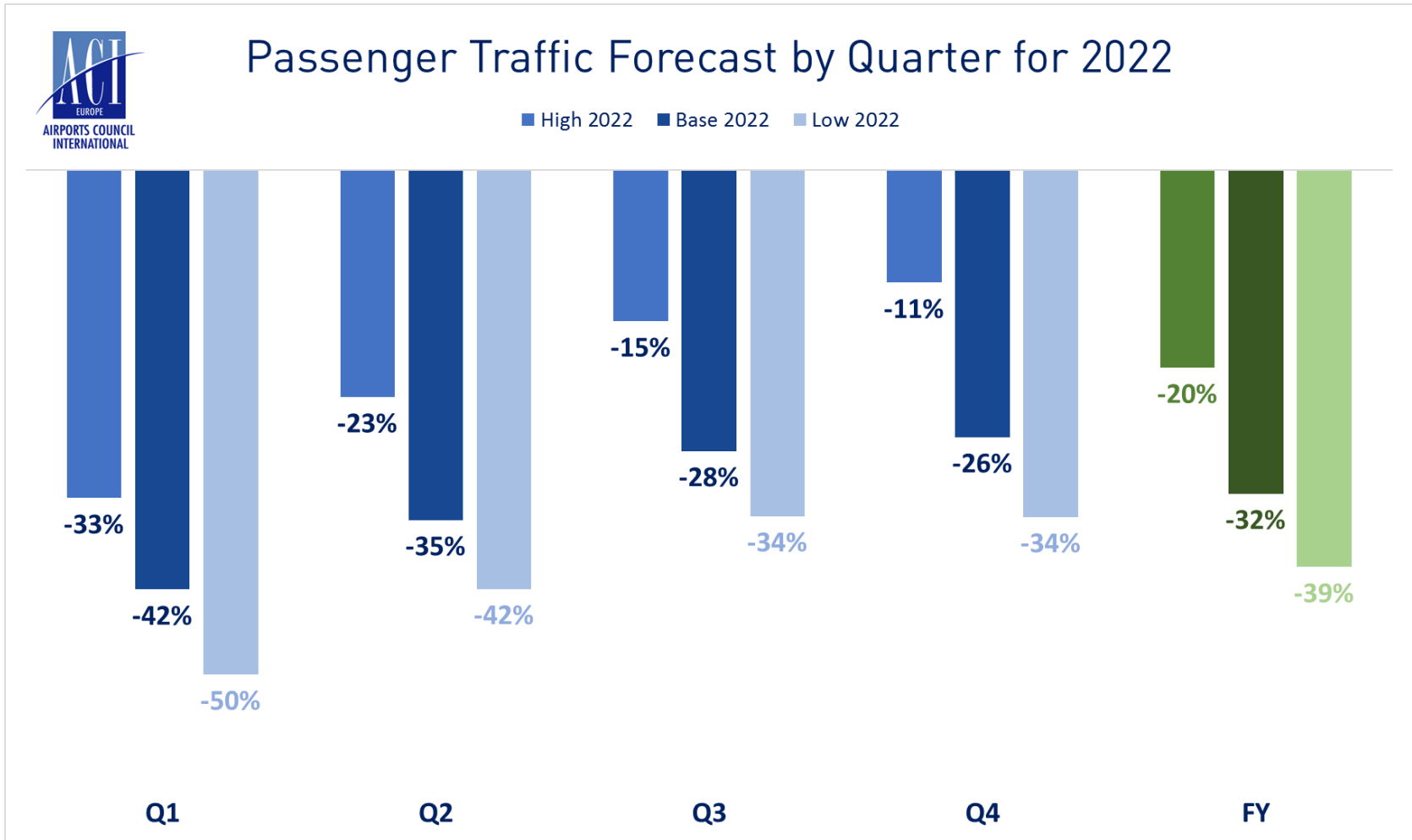
- High (optimistic): -20%
- Base scenario: -32%
- Low (pessimistic): -39%



-788 million passengers lost in 2022



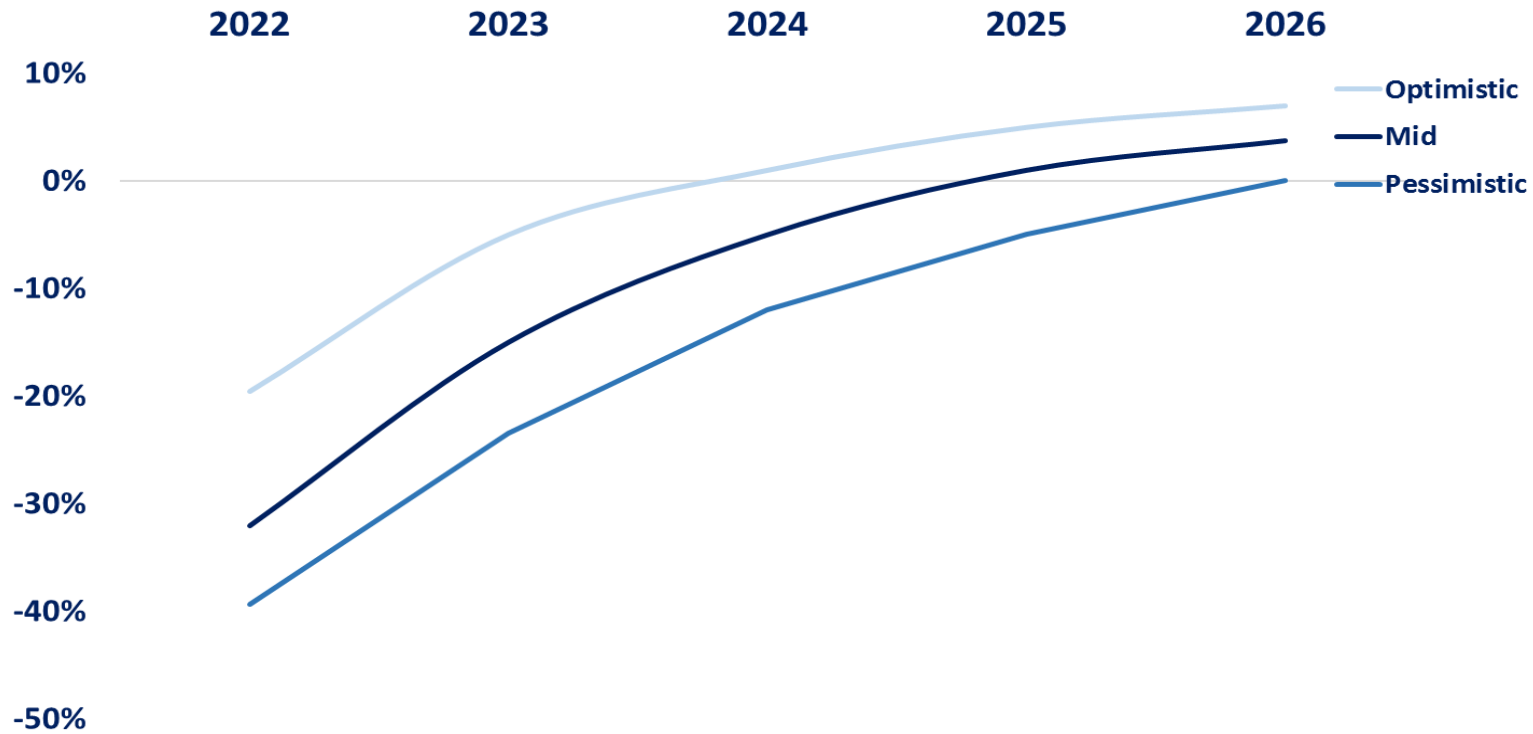
→ FY 2022 by Quarter



→ Full Recovery (still) Not Before 2025



European Airport Passenger Traffic 5-year Forecast



Annex 1

Monthly pax traffic estimates to December 2022

Scenario	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22
High	-40%	-37%	-35%	-35%	-33%	-30%	-25%	-23%	-20%	-15%	-15%	-15%	-13%	-10%	-10%
Base	-49%	-47%	-44%	-43%	-42%	-40%	-37%	-35%	-33%	-30%	-25%	-29%	-28%	-26%	-25%
Low	-55%	-55%	-51%	-50%	-50%	-50%	-45%	-40%	-40%	-35%	-33%	-35%	-35%	-35%	-33%



Annex 2

Yearly pax traffic estimates to 2026

Scenario	2022	2023	2024	2025	2026
High	-20%	-5%	1%	5%	7%
Base	-32%	-15%	-5%	1%	4%
Low	-39%	-24%	-12%	-5%	0%





FIND OUT MORE AT

www.aci-europe.org/economic-forecasts

