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A stop-start recovery in 2021 revealed in fragmented traffic results for Europe's airports

- **1.4 billion passengers lost in 2021 compared to pre-pandemic (2019) levels**
- **Passenger traffic increasing by +37% in 2021 compared to 2020, but still at -59% compared to 2019**
- **Omicron stalling the recovery in passenger traffic in the EU+ area**
- **TOP 5 European airports in 2021:** ***1. Istanbul, 2. Moscow-Sheremetyevo, 3. Paris-CDG, 4. Amsterdam-Schiphol, 5. Moscow-Domodedovo***
- **Regional airports recovering faster than larger airports**

Brussels, 25 January 2021*:* The Full Year 2021 & December 2021 traffic report released today by ACI EUROPE reveals the lasting impact of the COVID-19 pandemic on the airport industry. While passenger traffic across the **European airport network increased** by **+37**% in 2021 compared to 2020, it still remained **-59%** below pre-pandemic (2019) levels.

Olivier Jankovec, Director General of ACI EUROPE said: *"After losing 1.72 billion passengers in 2020, we all had high hopes for a strong recovery in 2021. But last year proved another difficult one, as Europe's airports ended up losing another* ***1.4 billion passengers*** *compared to 2019. This means they remain under considerable stress, with systemic financial weakness across our industry."*

A SPLIT YEAR & OMICRON STALLING THE RECOVERY

The Delta variant essentially knocked down passenger traffic in **the first half of 2021 (-77.7% against 2019)**, as lockdowns and severe travel restrictions were reintroduced and most intercontinental markets remained out of reach.

The rollout of the vaccines combined with the EU Digital Covid Certificates and the reopening of the transatlantic market in November saw passenger traffic finally improving in **the second half of the year (-42.4% against 2019)** - although the Omicron variant broke that dynamic in December.

While passenger traffic had been on a progressive improvement path between June (-66.3%) and November (-35.2%) compared to pre-pandemic (2019) levels, it went into reverse again in **December (-39.2%)**. This Omicron impact was focused on the EU+ market[1], where airports saw passenger traffic falling by -44.1% in December compared to -38.1% in November. Conversely, the variant did not prevent modest gains in the rest of Europe[2] (-17.1% in December compared to -19% in November).

[1] EU/EEA, UK and Switzerland
[2] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kosovo, Northern Macedonia, Moldova, Montenegro, Russia, Serbia, Turkey, Ukraine and Uzbekistan

Jankovec commented: "*The knee-jerk reaction of many Governments who ignored the ECDC guidance and rushed to reimpose travel bans and other restrictions – including for intra-European travel – has stalled our recovery. Yet, these travel restrictions did nothing to stop the spread of Omicron, as recognised just last week by the WHO*[3] *and also evidenced by a recent Oxera & Edge Health report*[4] *looking at the situation in the UK."*

EU+ MARKET VS. REST OF EUROPE

In 2021, Airports in the **EU+ market** saw passenger traffic increasing by **+29.2%** compared to the previous year, but still remaining at **-64.6%** against pre-pandemic (2019) levels.

Compared to 2019, the strongest yearly results came from airports in Greece (-46.8%), Romania (-52,7%), Luxembourg (-53.9%), Cyprus (-55.6%), Bulgaria (-55.9%) – closely followed by Spain (-56.4%) and Portugal (-57.9%). At the other end of the spectrum, airports in Finland (-80.5%), the UK (-78.1%), the Czech Republic (-74.8%) and Ireland (-74.4%) suffered the largest losses in passenger traffic – mainly a reflection of severe restrictions on travel imposed by these countries.

Meanwhile, airports in the **rest of Europe** significantly outperformed the European average, with passenger traffic increasing by **+59.4%** in 2021 compared to the previous year and remaining at just **-34.4%** compared to pre-pandemic (2019) levels.

This resulted from generally less severe travel restrictions and lockdowns. Compared to 2019, the best results were posted by airports in Russia (-24.4%) and Armenia (-29.3%). Israel (-72.9%) was a notable exception amongst the bloc.

TOP 5 LEAGUE SHIFTING BY YEAR END

During the 4th quarter of 2020 and 1st quarter of 2021, **the Majors** (5 busiest European airports) were all Turkish and Russian airports.

For the full year 2021, **Istanbul** (-46% compared to pre-pandemic - 2019 - levels) was the busiest European airport, followed by **Moscow-Sheremetyevo** (-38%), but **Paris-CDG** (-65.6%) and **Amsterdam-Schiphol** (-64.4%) rejoined league in the 3rd and 4th position – followed by **Moscow-Domodedovo** (-11.3%) in the 5th position.

London-Heathrow (-76%) rejoined the Top 5 league in November 2021 following the re-opening of the transatlantic market. This is still not the case for **Frankfurt** (-64.8%), which ranked as the 7th busiest European airport in 2021.

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[3] "*The failure of travel restrictions introduced after the detection and reporting of Omicron variant to limit the international spread of Omicron demonstrates the ineffectiveness of such measures over time.*" WHO International Health Regulation Emegency Committee (10th meeting – 19 January 2022)

[4] https://www.oxera.com/insights/reports/impact-of-travel-restrictions-on-omicron-in-the-uk/

By **December 2021**, Istanbul remained in the top position, followed by Paris-CDG (2nd position), London-Heathrow (3rd position), Madrid (4th position) and Amsterdam-Schiphol (5th position).

SMALLER REGIONAL AIRPORTS RECOVERING FASTER

Smaller regional airports have been recovering at a faster pace since last Summer compared to larger airports. This reflects the fact that beyond the transatlantic market, many intercontinental markets remain de facto closed due to severe travel restrictions and that the recovery remains largely driven by leisure and 'Visiting Friends and Relatives' travel on intra-European and domestic markets.

In **2021, category 4 airports (less than 5 million passengers per annum)** saw passengers decreasing by **-53.5%** compared to pre-pandemic (2019) levels whereas **category 1 airports (more than 20 million passengers per annum)** registered a decrease of **-63.3%**.

The gap widened over the last months of the year. In **December 2021**, as smaller regional airports were generally less impacted by the Omicron-related travel restrictions - as these spared domestic travel - **category 4 airports** saw passenger traffic decrease by **-18.1%** compared to a decrease of **-43.4%** for **category 1 airports**.

Insular regional airports and others attracting Low Cost/Leisure Carriers generally achieved the best performance in December 2021 compared to pre-pandemic (2019) levels, including: Ajaccio (+46.4%), Hammerfest (+8.9%), Calvi (+8%), Mikonos (-4.3%), Menorca (-4.3%), Palermo (-5.6%), Ponta Delgada (-10.9%), Fuerteventura (-13.1%) and Turin (-13.6%).

FREIGHT & AIRCRAFT MOVEMENTS

Freight traffic in **2021** increased by +21.8% throughout the European airport network compared to last year, and stood at **+7.7%** above pre-pandemic (2019) levels - with only marginal variations between the EU+ market and the rest of Europe.

Aircraft movements were up by **+23.3%** compared to 2020 but down by **-48%** against pre-pandemic (2019) levels.

2022 OUTLOOK

Looking at the months ahead, **Jankovec** said: "*Uncertainties as to the evolution of the pandemic remain significant and limit visibility beyond a few months, at best. For now, the impact of Omicron is still very much on us as airlines keep pulling out flights and capacity in response to weakened demand in what is already traditionally a low season. This means the First Quarter will be disappointing, but that we should hopefully see traffic take a better turn as Spring approaches. Whether this happens earlier depends on the pace at which travel restrictions can be lifted, now that Omicron is prevalent. A number of countries*[5] *are moving in that direction, but much more needs to be done.*

[5] UK, Ireland and Sweden

Today's planned adoption by the EU of an updated Recommendation for intra-European travel should in principle confirm that travel regimes will at long last be based on traveller's health status rather than their provenance. However, this will be meaningless unless Governments finally adhere to the plan and effectively coordinate."

ENDS

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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.