



Air Traffic Movement Outlook – Europe

August 2021

- Air traffic movements in Europe are expected to approach pre-COVID levels by 2024 as illustrated in Chart 1 below.
- Limited recovery of traffic expected for 2021 overall due to travel restrictions in place during first half of the year. Widespread vaccination and lifting of travel restrictions are expected throughout 2022 and 2023 which will facilitate a more rapid recovery in demand and flight operations from 2022 onwards.

Context

The operational and economic impact of COVID-19 on the aviation industry has been unprecedented. The pandemic caused a disruption across the whole aviation supply chain, affecting not only transportation but also sectors that depend on air transport in their distribution channels.

With the global roll out of vaccination campaigns, air travel will resume. Several organizations continue to develop scenarios for recovery of traffic based on when international borders will open and how travel restrictions will be eased.

However, with the resurgence of new variants in different countries and regions, there remains uncertainty over how soon traffic will recover and whether it will be gradual or if there will be spikes in traffic levels. The exact path (depth, length and shape) of recovery of air travel will depend upon

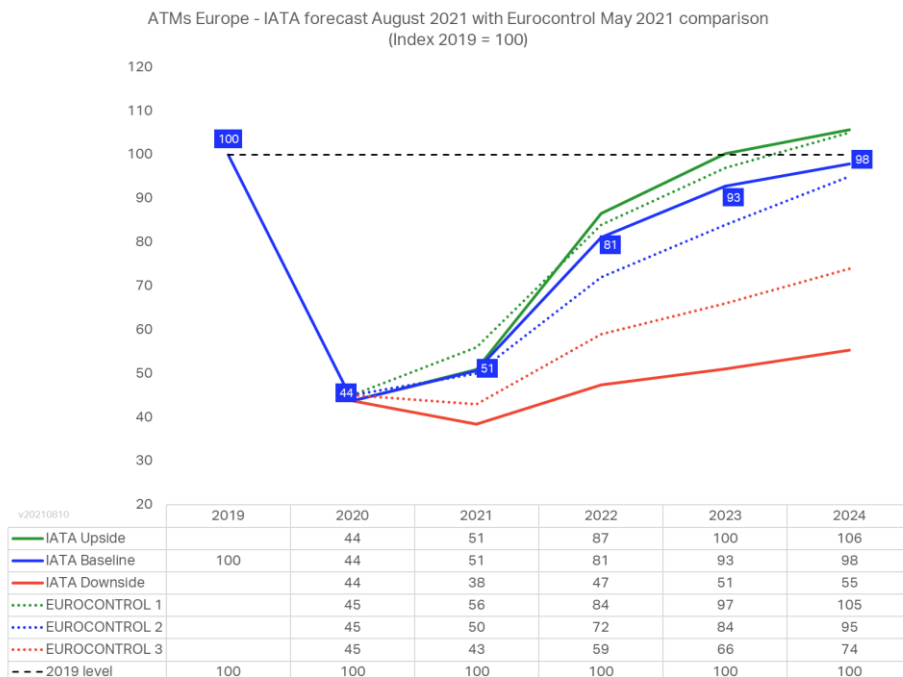
various factors, including the requirements for quarantine at destination.

As aviation prepares for future recovery, data and traffic forecasting will be critical to manage what is expected of the aviation system and of the people managing it. Ensuring that airport and airspace capacity will meet increasing levels and complexities of traffic will be critical for seamless operation.

IATA has developed traffic forecast scenarios for different regions based on forecast recovery in passenger flows. The main goal of these forecasts is to provide recovery profiles (baseline, optimistic and conservative) that can help the aviation supply chain plan and prepare. This analysis is based on forecast annual traffic volumes over the medium term and is not designed to plan monthly or weekly tactical operations.

European airspace movement forecast scenarios 2021-2024

Chart 1 – Forecast aircraft movements in Europe indexed to 2019 level



Source: IATA analysis based on [IATA / Tourism Economics Air Passenger Forecast July 2021](#); [EUROCONTROL STATFOR May 2021 ECAC forecast](#)

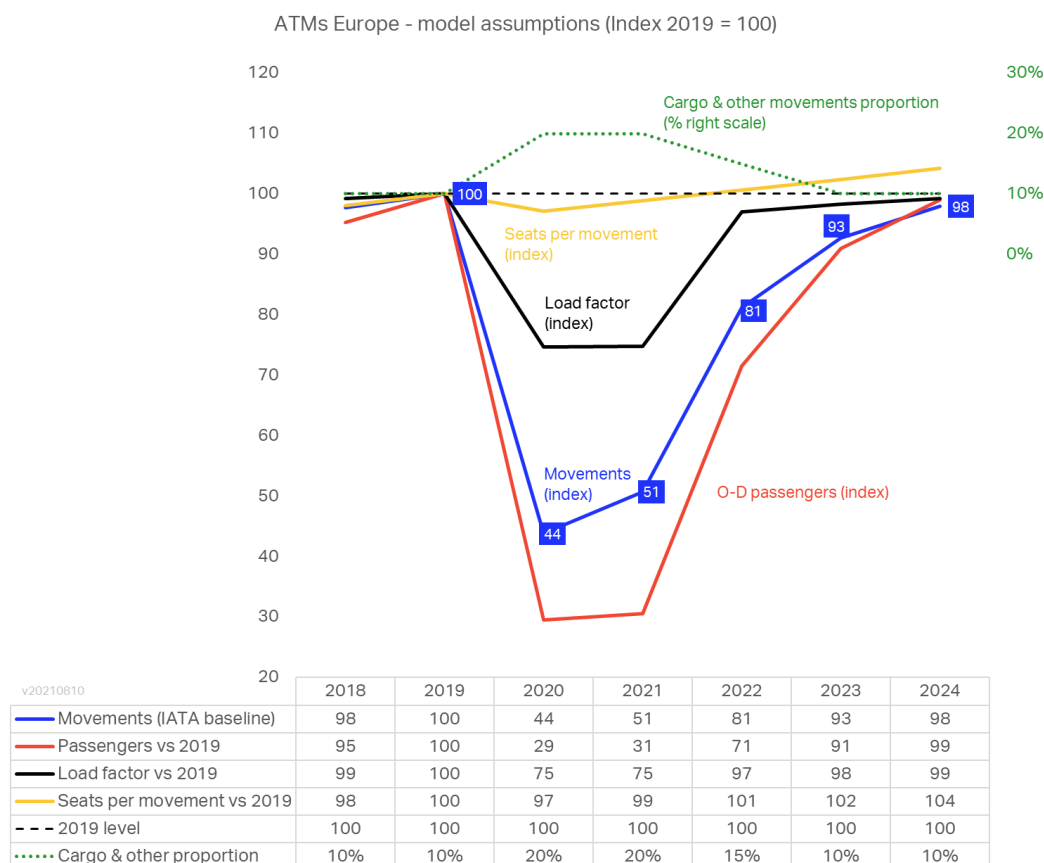
The solid blue line in Chart 1 shows the IATA baseline or 'most likely' scenario for recovery in aircraft movements. It is in line with the EUROCONTROL central scenario 2 for 2021. For the period 2022-2024 the IATA baseline tracks between the EUROCONTROL scenarios 1 and 2. The solid green line shows a potential faster recovery to 2019 levels in 2023 based on economic stimulus associated with consumer spending of savings accumulated during the pandemic driving additional air travel demand. The solid red line represents a downside scenario incorporating combined effects of renewed covid outbreaks, vaccine ineffectiveness on new variants and more substantial economic scarring.

Forecast inputs and assumptions

The forecast outlined in this outlook for the European region is based on the following key inputs and assumptions which are also illustrated in Chart 2 below:

1. The movements forecast is derived from annual forecast passenger flows to/from Europe or overflying. Baseline, upside and downside scenarios for passenger volumes are used as the primary forecast variable while the remaining assumptions below are held constant across scenarios.
2. Seats per movement assumed to increase at historical average of 1.8% per year after a fall in 2020.
3. Load factors are assumed to recover back to more normal historical levels over the 2022-2024 period.
4. Proportion of cargo and other movements is estimated to have doubled in 2020-2021 and assumed to return to pre-crisis levels by 2024 as scheduled passenger movements recover.

Chart 2 – Key assumptions related to aircraft movements forecast for Europe



Source: IATA analysis based on [IATA / Tourism Economics Air Passenger Forecast July 2021](#)

Updates and further information

The next update of this outlook is planned during the final quarter of 2021 and will be available at [iata.org/economics](https://www.iata.org/economics)

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