EUROCONTROL Data Snapshot

Business aviation in Europe is holding onto its 'best recovery from COVID-19' trophy, for now.

EUROCONTROL

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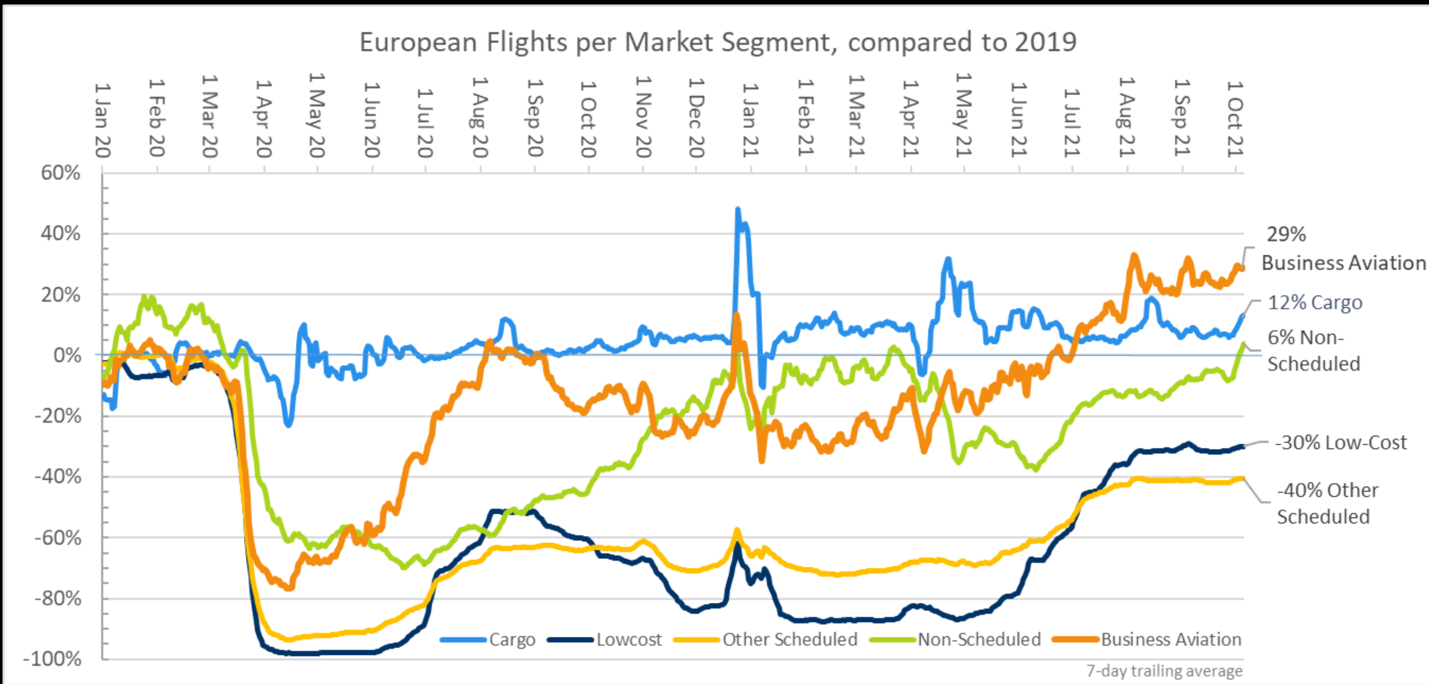

Since the start of the COVID-19 pandemic, just two segments of European aviation have managed an extended period back at 2019 levels of traffic: all-cargo and business aviation. Business aviation briefly matched 2019 volumes in summer 2020. The graph shows that this segment's recovery then restarted in April 2021, passing 2019 levels in July and stabilising at 20%-30% above 2019 since August (2,728 average daily flights in Aug-Sep compared to 2,182 in 2019). As a result, its market share has climbed from around 6% in 2019 (Jan-Sep), to 13% in 2021 so far.

Growth as strong as this comes from changes in both supply and demand: operators finding new ways to reach customers, and new services to offer, such as shared flights; plus new passengers turning to business aviation flights, because the connectivity they want isn't currently available with the timing or quality that they want.

Already this year's recovery for business aviation is more sustained than last year's. In summer, the focus of business aviation switches to Mediterranean, leisure destinations: Nice-Côte d'Azur airport often takes the top spot from Paris Le Bourget in July and August. This year was no exception to that rule, but Ibiza, Palma de Mallorca, Athens and Malaga were also all higher in the rankings than in a normal summer, with Palma, Athens and Malaga more than 40% above 2019 flights in August. So leisure has clearly contributed strongly to the growth of business aviation.

Early signs in September suggest that the growth will continue, but soften from its current 20%+ over 2019. Traffic at Olbia in Sardinia, which can be ahead of Le Bourget in the rankings in August, has declined less than normal in September, with strong growth over 2019 that still contributes to the 29% overall. Palma and Malaga are similar. So leisure continues to contribute.

However, growth at major airports away from the Mediterranean - Le Bourget, Geneva, Farnborough, Moscow, Luton – is in single figures in September, or even lower than 2019. As these increasingly make up a larger share of flights as autumn progresses, overall growth is likely to weaken. There are strong points – Zurich, Istanbul Ataturk, Berlin – which might help to sustain the current growth into the Autumn. Meanwhile, routes out of Europe crept above 2019 in July and August, boosted by flights from Moscow, but are back below 2019 in September. The expected re-opening of flights across the North Atlantic should help keep to keep business aviation in growth.

Technical Bits: Regular updates of data on 'business aviation', and the full definition, are available in the STATFOR dashboard. All growth is against 2019 flights.