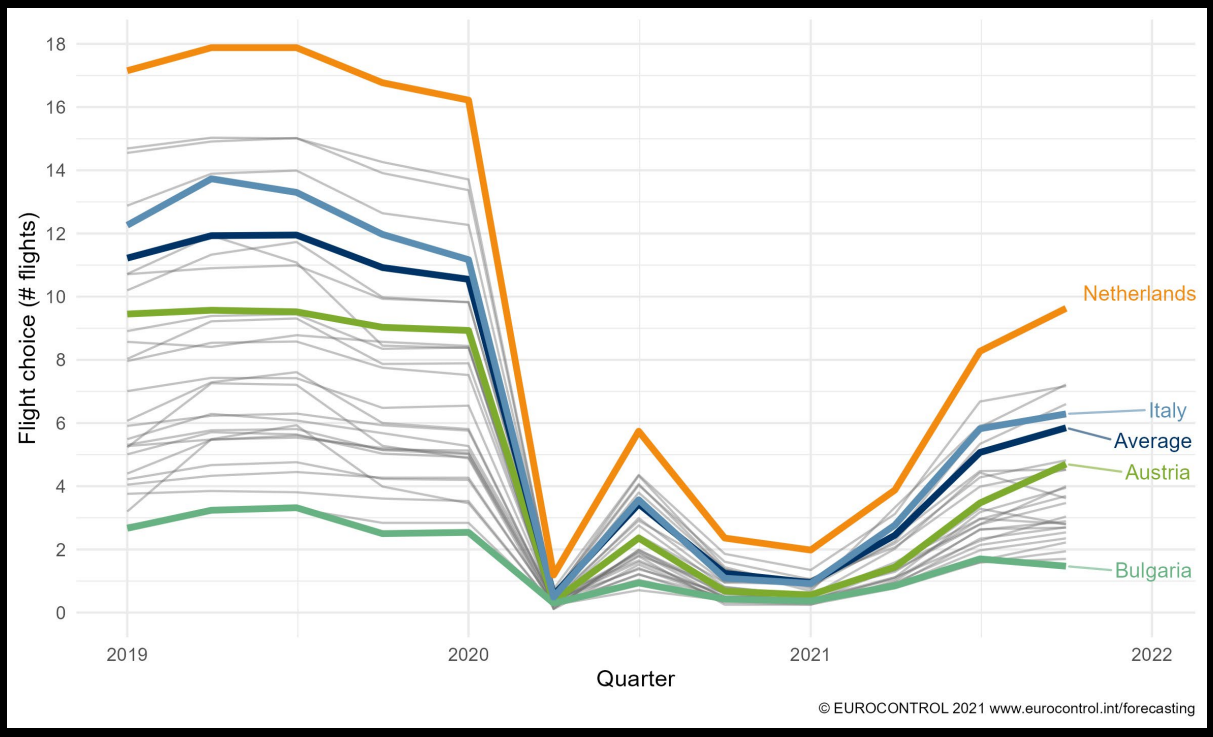
EUROCONTROL Data Snapshot

Flights are back to 75% of 2019 levels, but for passengers the choice of flights to their destination remains low.

14 December 2021



Eurocontrol tracks the connectivity available to passengers through a set of connectivity indicators. These are people-focused, covering the whole journey, door-to-door: including travel to and from the airport, available flight connections and cancellations. They're calculated at the district-to-district level. When we combine into country averages as shown in the graph, we weight by population, so that good connections from and to a country's population centres count more.

The 'flight choice' indicator in the graph shows how many options you have, on average, to get to your destination. Roughly, it's how many options you would see in a booking screen: direct and connecting flights, using different airports and at different times on the day of travel, but ignoring the same flight offered by different carriers and filtering out long connection times.

The four data points for 2019 (we calculate the indicators on quarterly samples), show that people in the Netherlands have the widest choice of flights for an average journey within Europe. This is because many of them can easily access Dutch airports, but some can also access airports in neighbouring countries, so they have plenty of options. Bulgarian residents are at the other end of the scale, with fewer of them having good access to busy airports.

As COVID-19 spread, connectivity collapsed by 2020Q2 (measured by 'flight choice' in June). Many routes were unavailable, and flight options were few for those routes that were served: the graph shows most countries with an average 'choice' of around 1 flight. The summer 2021Q3 recovery was short-lived, as it was for flights.

In 2022, the recovery has been more sustained. However, flight choice continues to lag behind the recovery in flights, on average reaching 54% of 2019Q4. For example, in Bulgaria flights reached 73% of 2019 in late November, while flight choice was only 59% of 2019. Similarly, the rich choice available to residents of the Netherlands remains more restricted: in 2021Q4, flights were at 79% of 2019 but flight choice was only 57% of 2019. Austria and Italy both have flight choice at 52% of 2019Q4, while flights are significantly higher at 60-65% and 78-79% respectively. For passengers, a full recovery in connectivity remains in the distance.

Technical Bits: Flight statistics here are for the same period as used for the 'flight choice' calculation. The data given in this snapshot are for intra-Europe connections where, due to data limitations, in this case 'Europe' is EU27+UK. Data for each of these States is provided in the accompanying spreadsheet.

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