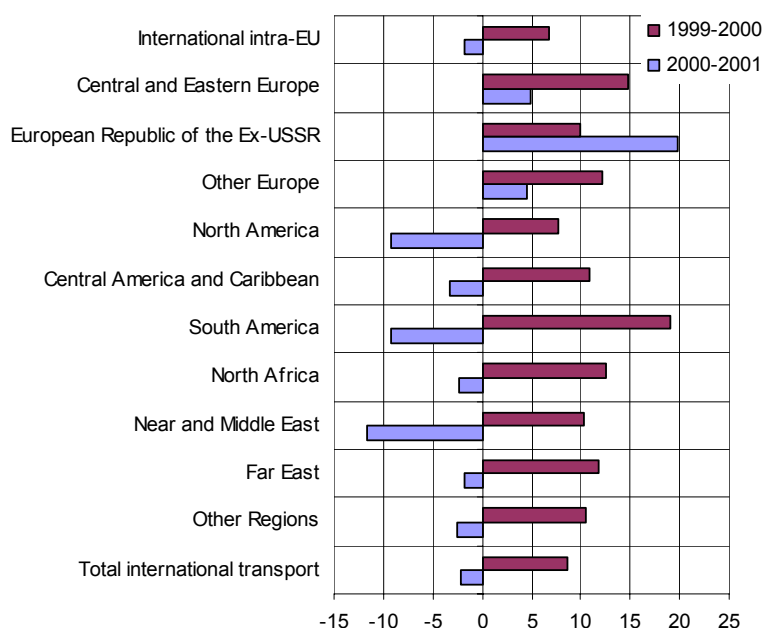


Impact of September 11th on air passenger transport

*Gradual slowdown in growth during the first three quarters
and a steep fall in fourth quarter 2001*

Vincent Tronet, Jana Gotvaldová

Graph 1: Percentage change in the number of passengers in EU international air transport by world region: comparison between 1999-2000 and 2000-2001



Highlights

In 2001, 11.5 million passengers less than in 2000 were transported by air in the EU, a fall of 2.0%. The rise between 1999 and 2000 had been 8.3%.

The 10 Acceding Countries were, with a growth of 4.3% in 2001, less affected by the tragic events of September 11th than the Member States, but their total passenger numbers are one-twentieth of the total passenger numbers of the EU Member States.

The most important increase (19.8%) in 2001 was reported between EU and European Republics of the ex-USSR. This is also the only case where the increase had been higher than in the previous period.

Quarterly data show that the fall in the last quarter of 2001 was very significant. All six Member states which submitted quarterly data to Eurostat reported a decrease in their international extra-EU air passengers in the fourth quarter of 2001, of between 13.4% and 42.3%.

The routes between EU Member States and North America, reported an average decrease of 9.2% in 2001 compared to 2000.

Statistics in focus

TRANSPORT

THEME 7 – 5/2004

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General overview

Table 1 outlines the evolution of “total passenger air transport” between the years 1999 and 2001 in the Member States of the European Union, Norway and Switzerland. The total air passenger transport in EU-15

represented in 2001 about 11.5 million passengers less than in 2000, a decrease of 2.0% while in 1999-2000 there was an increase of 8.3%.

Table 1: Total air passenger transport in the EU, Norway and Switzerland

Country	Number of passengers (in 1000)		2001	Growth (%) 1999-2000	Growth (%) 2000-2001
	1999	2000			
EU-15	536 958	581 654	570 115	+8.3%	-2.0%
Belgium	20 002	21 595	19 789	+8.0%	-8.4%
Denmark	18 320	19 136	19 794	+4.5%	3.4%
Germany	112 203	120 666	118 161	+7.5%	-2.1%
Greece	27 588	30 705	30 982	+11.3%	0.9%
Spain	101 326	109 967	112 944	+8.5%	2.7%
France	90 725	96 364	94 388	+6.2%	-2.1%
Ireland	15 235	16 696	17 325	+9.6%	3.8%
Italy	59 588	67 250	65 903	+12.9%	-2.0%
Luxembourg	1 574	1 656	1 619	+5.2%	-2.2%
Netherlands	37 452	40 626	39 596	+8.5%	-2.5%
Austria	13 778	14 766	14 697	+7.2%	-0.5%
Portugal	14 966	16 226	16 258	+8.4%	0.2%
Finland	9 796	10 721	10 764	+9.4%	0.4%
Sweden	22 892	24 328	24 260	+6.3%	-0.3%
United Kingdom	152 961	162 296	163 029	+6.1%	0.5%
Norway	17 976	20 069	19 996	+11.6%	-0.4%
Switzerland	30 081	31 895	30 893	+6.0%	-3.1%

A decline of air passenger transport in 2001 in comparison with 2000 was recorded in more than half of the EU Member States, as well as in Norway and Switzerland. Belgium recorded the largest decrease of 8.4%. Italy reported a decrease of 2.0% (equivalent to the average of EU-15) after the highest increase in 2000 (12.90%). Although some EU-15 Member states showed an increase in passenger figures during 2001, the growth over the period 2000-2001 was in every case lower than the growth 1999-2000. The highest increase in 2001 was recorded in Ireland (+3.8%), followed by Denmark (+3.4%, partly based on estimations) and by Spain (+2.7%), while their growth in the previous year had been +9.6%, +4.5% and +8.5% respectively.

Graph 2 offers a view in absolute figures and allows comparison of the total number of passengers transported by air in each country. It also shows the shares of national, international intra-EU and international extra-EU transport.

Graph 2: Number of passengers in EU, Norway and Switzerland in 2001

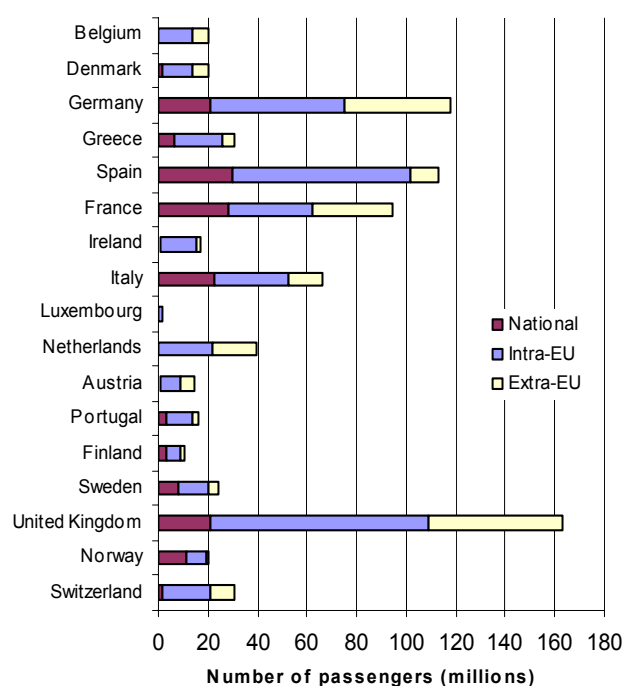


Table 2: Total air passenger transport in the Candidate Countries

Country	Number of passengers (in 1000)		Growth (%) 1999-2000	Growth (%) 2000-2001	
	1999	2000			
CC-13 *	60 279	68 040	68 495	+12.9%	+0.7%
ACC-10 *	26 047	28 403	29 620	+9.0%	+4.3%
Bulgaria	2 124	2 285	2 629	+7.6%	+15.0%
Czech Republic	5 039	5 759	6 325	+14.3%	+9.8%
Estonia	551	560	584	+1.6%	+4.3%
Cyprus	5 552	6 125	6 530	+10.3%	+6.6%
Latvia	508	576	625	+13.4%	+8.5%
Lithuania	543	581	650	+7.0%	+12.0%
Hungary	4 325	4 697	4 582	+8.6%	-2.5%
Malta	2 931	2 951	2 836	+0.7%	-3.9%
Poland	5 246	5 733	6 164	+9.3%	+7.5%
Romania	2 095	2 379	2 503	+13.5%	+5.2%
Slovenia	897	991	886	+10.5%	-10.6%
Slovakia	454	430	438	-5.4%	+1.9%
Turkey	30 012	34 973	33 743	+16.5%	-3.5%

* Passengers travelling between countries in the table are counted twice in CC-13 and ACC-10 aggregates, but they represent a small share of the total

Overall growth in the 13 Candidate Countries reached +0.7% in 2001 in comparison with +12.9% in 2000 (see table 2). However, nine out of thirteen Candidate Countries continued to show an increase in their passenger figures in 2001. The biggest increase was registered in Bulgaria (+15.0%) and the biggest decrease in Slovenia (-10.6%). Malta, Hungary and

above all, Turkey, which alone handles about half of the passengers in the Candidate Countries, also registered a decrease. Table 2 shows that the 10 Acceding Countries, with an average growth of +4.3% in 2001, were less affected by September 11th than the EU Member States (which showed an overall decrease of 2.0% in 2001).

Quarterly data

Table 3 and graphs 3 and 4 present data from six countries which submitted quarterly air passenger data in 2000 and 2001. This table is also broken down into "national", "international intra-EU" and "international extra-EU" transport. It shows that the growth rate gradually slowed down during 2001 in four of the six countries. The steep fall in the fourth quarter however shows that the consequences of September 11th on air transport explain most of the 2001 decline.

The situation varies widely according to country: Belgium, with -33.7%, had the most notable decline in the fourth quarter 2001 (also linked to the insolvency of Sabena). Spain recorded a decline of 13.4% in fourth quarter international extra-EU figures: much higher than for national passengers (-3.8%) and international intra-EU passengers (-3.2%). Finland showed a rate of

growth in the third quarter of 2001, for international extra-EU passengers, three times higher than that for international intra-EU passengers, (+9.7% compared to +3.3%), whereas in the fourth quarter, the drop in extra-EU passengers was more than twice that for international intra-EU passengers (-14.5% versus -6.1%).

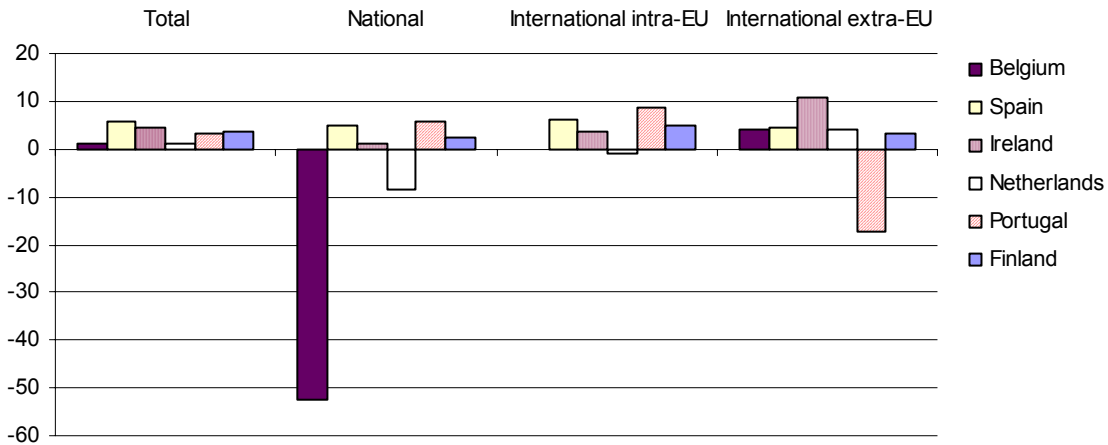
Only Ireland showed a positive evolution of its total passenger figures in the last quarter of 2001. This was mainly linked to the growth in international intra-EU transport (+5.2% in fourth quarter), probably due to the development of low cost carrier traffic. Portugal's international intra-EU figures increased for all quarters of 2001 (including fourth quarter), whereas international extra-EU figures decreased for all quarters, with the biggest drop in the fourth quarter (-33.9%).

Table 3: Quarterly evolution 2000-2001 in selected Member States

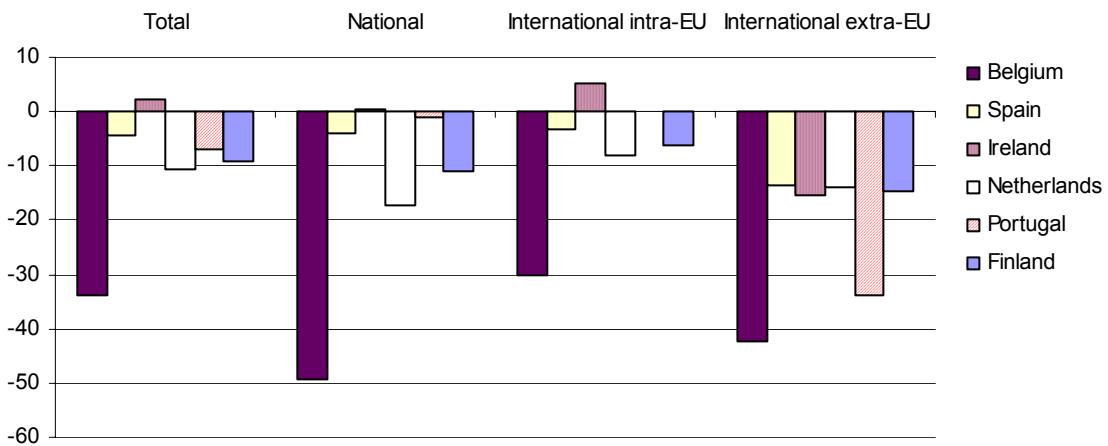
Transport	1 ^Q			2 ^Q			3 ^Q			4 ^Q		
	(in 1000)		Evolution (%)	(in 1000)		Evolution (%)	(in 1000)		Evolution (%)	(in 1000)		Evolution (%)
Total	2000	2001	2000-2001	2000	2001	2000-2001	2000	2001	2000-2001	2000	2001	2000-2001
6 countries *	41 561	43 715	+5.2%	57 716	59 582	+3.2%	67 784	68 800	+1.5%	48 770	44 579	+8.6%
Belgium	4 358	4 478	+2.7%	5 787	5 791	+0.1%	6 503	6 241	-4.0%	4 947	3 279	-33.7%
Spain	20 453	21 971	+7.4%	29 589	30 943	+4.6%	35 353	36 563	+3.4%	24 572	23 466	-4.5%
Ireland	3 118	3 243	+4.0%	4 442	4 656	+4.8%	5 503	5 704	+3.7%	3 633	3 722	+2.4%
Netherlands	8 333	8 502	+2.0%	10 655	10 739	+0.8%	12 080	11 824	-2.1%	9 558	8 532	-10.7%
Portugal	2 730	2 860	+4.8%	4 492	4 590	+2.2%	5 669	5 707	+0.7%	3 335	3 102	-7.0%
Finland	2 569	2 661	+3.6%	2 751	2 864	+4.1%	2 676	2 762	+3.2%	2 725	2 478	-9.1%
National												
6 countries	7 847	8 262	+5.3%	9 203	9 558	+3.9%	10 017	10 449	+4.3%	8 648	8 277	-4.3%
Belgium	2.98	0.51	-82.9%	1.09	1.42	+30.7%	3.59	0.92	-74.3%	0.49	0.25	-49.5%
Spain	6 263	6 629	+5.8%	7 444	7 745	+4.0%	8 129	8 536	+5.0%	7 047	6 778	-3.8%
Ireland	140	137	-2.1%	171	178	+4.1%	199	201	+1.2%	157	158	+0.4%
Netherlands	47	43	-9.3%	58	54	-7.9%	58	50	-14.1%	48	39	-17.4%
Portugal	547	574	+5.0%	742	787	+6.1%	940	988	+5.1%	594	588	-1.0%
Finland	847	878	+3.7%	786	793	+0.9%	688	673	-2.2%	801	714	-10.9%
International intra-EU												
6 countries *	25 070	26 455	+5.5%	37 415	38 684	+3.4%	44 108	44 922	+1.8%	30 095	28 218	-6.2%
Belgium	3 049	3 114	+2.1%	4 109	4 048	-1.5%	4 428	4 231	-4.5%	3 479	2 432	-30.1%
Spain	11 953	12 956	+8.4%	19 223	20 188	+5.0%	23 431	24 211	+3.3%	14 876	14 394	-3.2%
Ireland	2 644	2 731	+3.3%	3 704	3 856	+4.1%	4 518	4 712	+4.3%	3 021	3 179	+5.2%
Netherlands	4 569	4 559	-0.2%	5 992	5 919	-1.2%	6 634	6 439	-2.9%	5 237	4 814	-8.1%
Portugal	1 614	1 788	+10.7%	2 938	3 159	+7.5%	3 651	3 836	+5.1%	2 065	2 067	+0.1%
Finland	1 240	1 307	+5.4%	1 448	1 514	+4.5%	1 446	1 493	+3.3%	1 418	1 332	-6.1%
International extra-EU												
6 countries	8 644	8 998	+4.1%	11 098	11 340	+2.2%	13 659	13 430	-1.7%	10 027	8 084	-19.4%
Belgium	1 306	1 363	+4.4%	1 676	1 742	+3.9%	2 071	2 009	-3.0%	1 468	847	-42.3%
Spain	2 236	2 386	+6.7%	2 922	3 010	+3.0%	3 793	3 816	+0.6%	2 649	2 294	-13.4%
Ireland	334	375	+12.1%	567	623	+9.9%	786	791	+0.6%	455	385	-15.4%
Netherlands	3 717	3 900	+4.9%	4 605	4 766	+3.5%	5 388	5 335	-1.0%	4 273	3 679	-13.9%
Portugal	569	498	-12.4%	812	644	-20.7%	1 079	882	-18.2%	676	447	-33.9%
Finland	482	476	-1.3%	516	556	+7.7%	543	596	+9.7%	506	432	-14.5%

* Passengers travelling between countries in the table are counted twice in the total.

Graph 3: Percentage change 2000-2001 of air passenger transport semester one (Quarter one plus two)



Graph 4: Percentage change 2000-2001 of air passenger transport in Quarter four



The downward trend in the Netherlands for the first three quarters was augmented by the sharp drop in the fourth quarter for both national and international intra-

EU transport. Due to the low numbers, the national figures for Belgium are not significant.

International extra-EU transport

At EU level, international extra-EU air passenger transport was the most affected with a decrease of -2.7% in 2001 compared with 2000. Table 4 highlights the top 30 routes between the EU Member States and the world regions. These routes represent 68.7% of the international extra-EU transport of air passengers. Routes whose volumes rose or declined by more than 5% are shown in bold.

All five country routes to North America which are included in the table decreased, the greatest decrease is to be found in the Italy-North America routes at 15.7%. The least affected country route was France-North America with a 3.7% decrease. Routes to/from non EU European countries mostly increased their passengers in 2001 or showed only small declines.

Table 4: International extra-EU passenger transport 2001 : Top 30 country from/to region routes

Rank	Routes in international extra-EU traffic		Number of passengers (in 1000) in 2001	Evolution (%) 2000-2001
1	United Kingdom	North America	20,205	-10.3%
2	Germany	Other Europe	13,158	+7.4%
3	United Kingdom	Other Europe	11,429	+1.2%
4	Germany	North America	8,286	-7.4%
5	France	North America	7,414	-3.7%
6	France	North Africa	7,367	+4.4%
7	United Kingdom	Far East	5,248	-5.7%
8	Netherlands	North America	5,089	-8.6%
9	Germany	Central and Eastern Europe	4,665	+9.8%
10	Germany	Far East	4,610	+2.3%
11	France	Other Europe	4,373	-0.6%
12	Germany	North Africa	3,901	-6.9%
13	United Kingdom	Near and Middle East	3,858	-2.4%
14	Netherlands	Other Europe	3,770	+4.9%
15	Spain	Other Europe	3,647	-1.2%
16	Denmark	Other Europe	3,203	:
17	France	Far East	3,159	+4.2%
18	Italy	North America	2,815	-15.7%
19	Italy	North Africa	2,669	-11.2%
20	United Kingdom	Central America and Caribbean	2,606	+0.9%
21	Netherlands	Far East	2,488	+2.1%
22	Italy	Other Europe	2,333	-2.0%
23	Sweden	Other Europe	2,237	+0.3%
24	United Kingdom	Central and Eastern Europe	2,198	+3.1%
25	Germany	European Republics of the Ex-USSR	2,024	+11.1%
26	Austria	Other Europe	1,992	-2.2%
27	United Kingdom	Indian Sub-Continent	1,941	+4.5%
28	Spain	South America	1,902	+7.0%
29	United Kingdom	Southern Africa	1,886	+4.0%
30	Germany	Near and Middle East	1,845	-2.9%

Impact on airports according to "airport size category"

Category one airports:

Airports with fewer than 150 000 passengers per year

Category two airports: Airports with between 150 000 and 1.5 million passengers per year

Category three airports:

Airports with more than 1.5 million passengers per year.

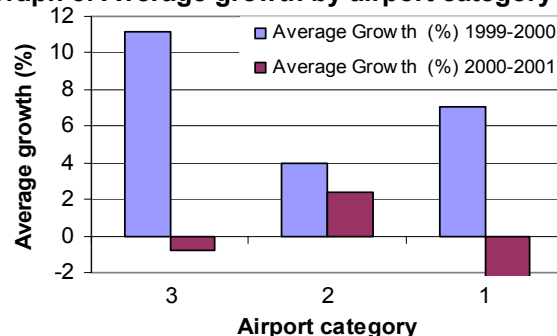
Table 5: Change in airport figures by category

Airport category in 2001	Number of airports used for calculation	Number of passengers (in 1000) in 2001	Average Growth (%) 1999-2000	Average Growth (%) 2000-2001
3	75	734,577	+11.2%	-0.8%
2	81	46,441	+4.0%	+2.4%
1	23	2,088	+7.1%	-3.1%

Results show that the category three airports showed the highest decrease of their passenger figures as they are the most involved in Extra-EU routes (the most

affected by the events of September 11th).

Graph 5: Average growth by airport category



In contrast middle size airports (with between 150 000 and 1.5 million passengers per year) were least influenced. They even showed an increase which may be attributable to the development of low-cost airline traffic.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The figures presented in this publication have been extracted from the Eurostat aviation database, which contains international air transport data from 1993 onwards for EEA countries and Switzerland, as well as the candidate countries since 2000. For EEA countries and Switzerland data on the domestic passengers are available since 1997.

The database is available online, on the annual Aviation CD-ROM, and on the annual DVD-ROM "Everything on transport statistics".

Definitions: On Flight Origin/Destination (OFOD) and Flight Stage (FS) Data - International Passengers

ICAO (International Civil Aviation Organisation) defines On Flight Origin and Destination traffic as traffic on a given flight with the same flight number subdivided by airport pairs in accordance with the point of embarkation and point of disembarkation on that flight. For passengers, freight or mail where the airport of embarkation is not known the aircraft origin should be deemed to be the point of embarkation; the same principle is used for the point of disembarkation. Since an individual passenger's air journey may consist of more than one flight, a passenger's on flight origin and destination is not necessarily his true origin and destination.

A flight stage is defined by ICAO as the operation of an aircraft from take-off to its next landing.

To simplify, it could be considered that a "flight stage" corresponds to the airport that the aircraft takes off from and lands at whereas an "on flight origin destination" corresponds to the airport of embarkation and disembarkation of a passenger.

The difference between On Flight Origin/Destination and Flight Stage data is related to direct transit passengers (passengers staying on board an aircraft at a flight stage). It can be illustrated by the following example: a flight is operated on a route New York-London-Paris. The passenger traffic consists of 185 passengers travelling from New York to London, 135 from New York to Paris and 75 from London to Paris. Thus in terms of On Flight Origin/Destination data the figures recorded are 185 passengers New York-London, 135 passengers New York-Paris and 75 passengers London-Paris. New York would record the figures for New York-London and New York-Paris; London would record New York-London and London-Paris; Paris would record New York-Paris and London-Paris. In terms of Flight Stage data there are two flight stages and the figures recorded are; New York-London 320=(185+135) passengers; London-Paris 210=(135+75) passengers.

Passengers are defined as all passengers whose air journey begins or terminates at the reporting airport, plus connecting passengers who are counted twice at the reporting airport. Direct transit passengers are counted for Flight Stage data but not for On Flight Origin/Destination data. (In the previous example the 135 passengers in transit in London are recorded by London in terms of Flight Stage data but would not be recorded by London in terms of On Flight Origin/Destination data.)

Passengers: On Flight Origin/Destination and Flight Stage Data - Reporting Countries

In principle, information provided in this publication is based on On Flight Origin/Destination data rather than Flight Stage data. On Flight Origin/Destination data have been used where available, but Flight Stage data have been accepted for those countries where no On Flight Origin/Destination data were reported. That is, for all Figures and Tables, On Flight Origin/Destination data have been used for Germany (DE), Greece (EL), Spain (ES), France (FR), Ireland (IE), Finland (FI), the Netherlands (NL), Portugal (PT) and the United Kingdom (UK); Flight Stage data only for Belgium (BE), Denmark (DK), Italy (IT), Luxembourg (LU), Austria (AT) and Sweden (SE). Denmark supplied no data for 2000, Greece no data for 2001.

Mainly on long-haul extra-EU routes, passenger volumes declared according to the Flight Stage principle can be underestimated (because of the relatively high proportion of direct transits in this case). Methodologically, however, this cannot be avoided.

World regions

The 'world regions' as defined in this publication correspond to the nomenclature used by all units of Eurostat (OJ L335, 10.12.1998, page 22 – Commission Regulation (EC) 2645/98 on the nomenclature of countries and territories for the external trade statistics of the Community and statistics of trade between Member States).

National (domestic) passengers:

For the calculation of the "total national passengers", in order to avoid double counting, only departures (passengers at the airport of embarkation) have been taken into account.

International Intra-EU passenger transport

For the calculation of the total EU-15 for international intra-EU passengers, in order to avoid double counting, only the departure passengers in each reporting country have been taken into account (except when the partner airport is not a reporting airport where arrival passengers have also been taken into account).

For the countries having not declared On Flight Origin/Destination data or Flight Stage data for a specific year or a specific airport, estimates were made for departures by taking the corresponding arrival figures reported by other countries.

International Extra-EU passenger transport

In case of missing data for the calculation of the international extra-EU passenger transport of one country, estimates based on the linear regression method have been used.

Impact on airports according airport size category

Please note that airports, which showed a very high increase (more than 100%) or a big decrease (more than 50%), might have been affected by other factors than 11 September. They have therefore been excluded from this publication. They represented, in year 2000, 3% of the total passengers transported for category 3 airports, 10.7% for category 2 airports and 20.1% for category 1 airports.

Further information:

➤ Databases

NewCronos, Theme 7

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