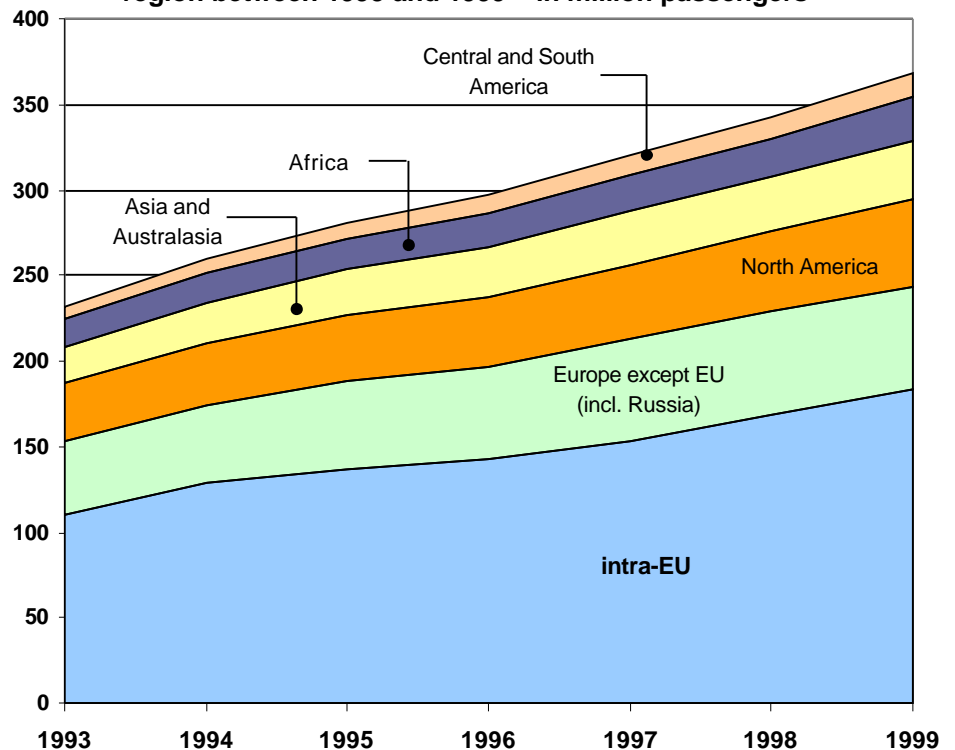


# International air transport Passenger traffic 1998-1999

50:50 for intra and extra-EU traffic

*Vincent Tronet*

Graph 1 : Development of international passenger air transport by world region between 1993 and 1999 – in million passengers



## Main developments

The total number of passengers carried in international traffic from and to EU countries in 1999 was 374.8 million – an increase of 7.5% compared to 1998 (intra-EU traffic increased by 9.3%, extra-EU traffic by 5.6%).

On average, nearly 50% of this total is intra-EU traffic, 16% is traffic with non-EU Europe, nearly 14% is traffic with North America, the remaining 20% represents traffic with the rest of the world.

13% of the total international intra-EU traffic in 1999 is between the UK and Spain (both directions) alone, 10% between Germany and Spain (both directions). 42% of this total intra-EU traffic is to and from the UK. London - Dublin (4.3 million passengers), London - Amsterdam (3.5 million) and London - Paris (2.8 million) are the most busy intra-EU city pairs.

When only relations with a volume over 50 thousand passengers are considered, it appears that the Edinburgh-Paris route displays the highest growth rate (+93%), Madrid-Manchester the most important decline (-37%).

In extra-EU traffic, the airport of Milano-Malpensa handled nearly 94% more passengers in 1999 than in the previous year.

Concerning again extra-EU traffic, the number of passengers flying to and from North Africa increased by 29%, those to and from Australasia decreased by 12%.

## Statistics in focus

### TRANSPORT

THEME 7 – 6/2001

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## Evolution of total traffic 1993-1999

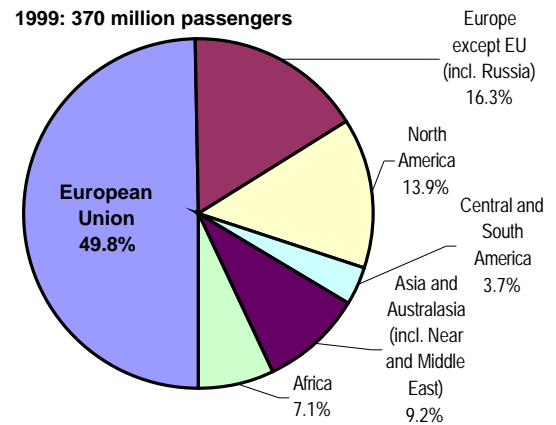
The total number of passengers carried in the EU totalled nearly 370 million in 1999. This represents an increase of 7.5% compared to 1998.

Table 1: Total international passenger traffic: development by country

	Average annual growth 1993-98 (%)	change 1998-99 (%)
EU-15	<b>8.3</b>	<b>7.5</b>
Belgium	13.0	8.2
Denmark	8.8 <sup>1)</sup>	6.8
Germany	6.7	7.9
Greece	1 <sup>2)</sup>	13.7
Spain	8.7	10.8
France	6.2	8.3
Ireland	13.1 <sup>3)</sup>	10.6
Italy	8.2	6.4
Luxembourg	7.2	5.8
Netherlands	10.7	7.6
Austria	8.4	4.3
Portugal	7.1	7.0
Finland	10.4	3.5
Sweden	9.5	10.1
United Kingdom	7.8	6.4

<sup>1)</sup> estimated - <sup>2)</sup> 1996-1998 - <sup>3)</sup> 1994-1998

Graph 2 : Total international traffic in EU-15 : share by world region

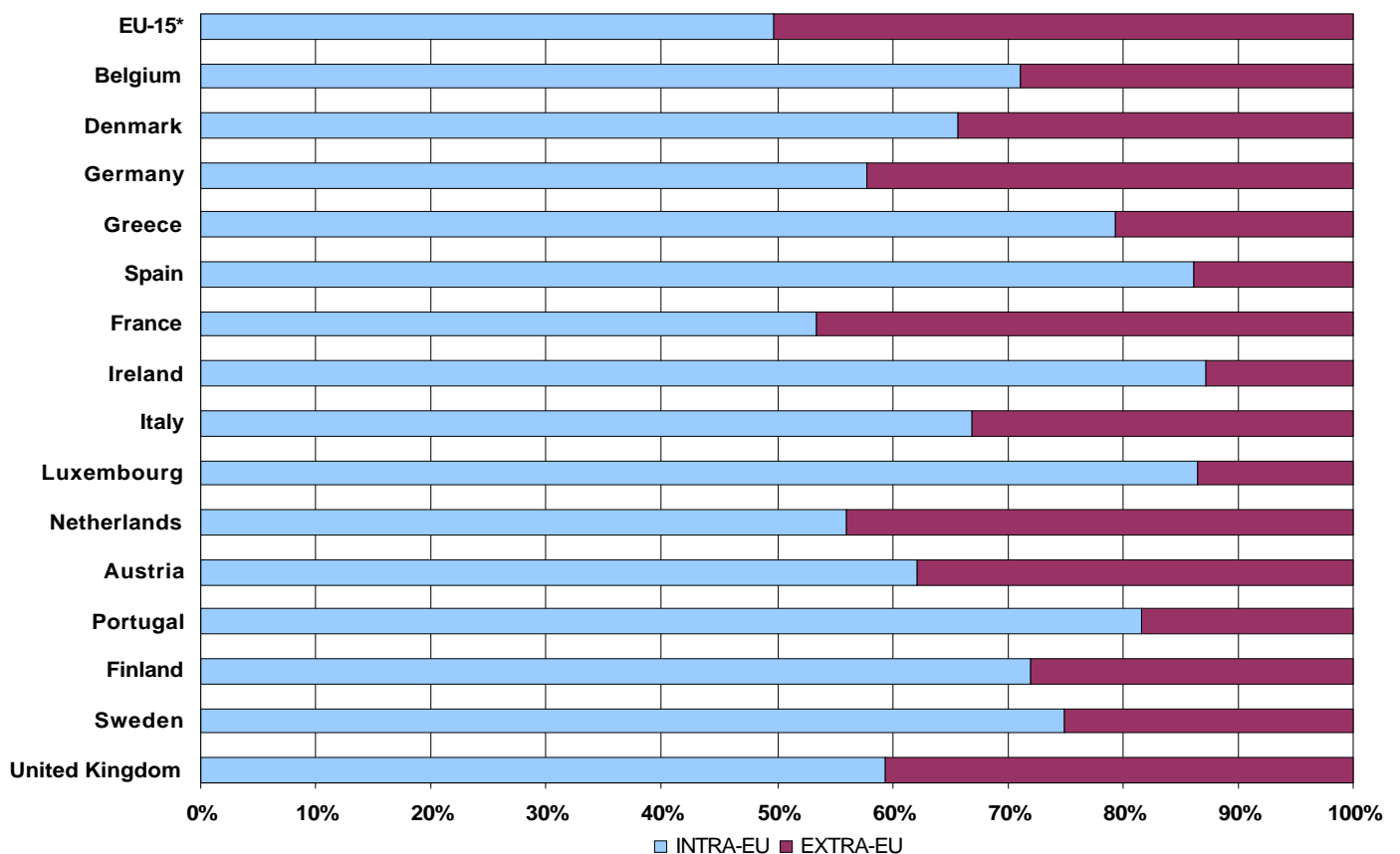


Greece, Spain, Ireland and Sweden display a growth of over 10% in 1999 compared to the previous year (see Table 1). Except for Greece, these countries already showed high growth rates in previous years.

Graph 2 shows that intra-EU traffic accounts for close to 50% of the total traffic, non-EU Europe and North America follow with 16% and 14% respectively. The distribution in these shares did not change significantly compared to 1998.

## Share of intra- and extra-EU traffic in total international traffic

Graph 3 : Distribution between intra-EU and extra-EU passenger traffic in 1999



\* for EU-15, in order to avoid double counting of intra-EU passengers (at the departure and arrival airports), only departures have been taken into account, whereas for the breakdown of each individual Member State, passengers at departures and arrivals have both been considered. Thus a person flying for instance from France to Spain, is counted as one Intra-EU passenger for France (departure airport), for Spain (arrival airport) and also as only one Intra-EU passenger for EU-15 (as a passenger departing from France, but not as a passenger arriving in Spain).

Taking into account departures and arrivals, the share of intra-EU traffic is high in most countries: in general over 60%, except for Germany, France, the Netherlands and the UK (see Graph 3 on the previous page). In 10 of the 15 Member States, the intra-EU share progresses slightly compared to 1998. The most important shift towards more intra-EU traffic was recorded for Luxembourg (+4%). This country offered no more direct flights to the USA in 1999 and supplied flight-stage data and not origin-destination data .

Thus, a person flying for instance to the USA from Luxembourg via Paris is recorded as an intra-EU (Luxembourg-France) passenger by Luxembourg authorities.

The countries displaying the highest extra-EU shares coincide with those having Europe's major airports considered as gateways for intercontinental and long-haul air traffic, like the Paris airports, Amsterdam-Schiphol, Frankfurt/Main and the London-airports.

## International intra-EU traffic

Based on departures, intra-EU passenger traffic progressed by 9.3% from 1998 to 1999 (from 167.9 million to 183.6 million passengers), an impressive growth as such but comparable and in line with the development since 1996.

largest country pair is Germany-Spain with just over 10%. The high numbers are explained by the important holiday traffic. The third country pair (UK-Ireland) is already less than half as important in terms of passengers as the previous one.

Table 2 offers an overview of the main country pairs in intra-EU traffic. It appears that 13% of the entire traffic is between the United Kingdom and Spain (and vice-versa). Second

The first 10 pairs displayed in Table 2 are responsible for more than a half (51.9%) of the entire intra-EU traffic.

**Table 2: Main intra-EU country pairs in 1999**

Rank 1999	Country pair	% of total intra-EU pass. carried	Rank 1998
1	UK-Spain/Spain-UK	13.0	1
2	Germany-Spain/Spain-Germany	10.1	2
3	UK-Ireland/Ireland-UK	4.8	3
4	UK-Germany/Germany-UK	4.4	4
5	France-UK/UK-France	4.2	5
6	Netherlands-UK/UK-Netherlands	3.7	6
7	Italy-UK/UK-Italy	3.3	7
8	UK-Greece/Greece-UK	2.8	11
9	Germany-Greece/Greece-Germany	2.8	9
10	France-Germany/Germany-France	2.8	8
11	Germany-Italy/Italy-Germany	2.6	10
12	France-Spain/Spain-France	2.5	13
13	Italy-France/France-Italy	2.5	12
14	Italy-Spain/Spain Italy	1.9	14
15	UK-Portugal/Portugal-UK	1.8	15

**Table 3: Main intra-EU city pairs in 1999**

Rank 1999	City pair	Number of passengers carried	Rank 1998
1	London-Dublin	4 345 310	1
2	London-Amsterdam	3 513 832	2
3	London-Paris	2 843 717	3
4	London-Frankfurt	2 017 405	4
5	London-Bruxelles	1 518 899	6
6	London-Milano	1 511 343	5
7	London-Roma	1 485 446	7
8	London-Madrid	1 450 823	11
9	Düsseldorf-Palma de Mallorca	1 445 183	8
10	London-München	1 384 014	15
11	London-Malaga	1 383 085	9
12	Madrid-Paris	1 286 319	13
13	London-Stockholm	1 279 121	10
14	London-Palma de Mallorca	1 238 618	12
15	London-Barcelona	1 170 973	18

The 15 most important country pairs in 1999 are the same as in 1998, although they appear in a slightly different order. The "Top-7" remain strictly the same. From the 15 pairs in Table 2, eight include the United Kingdom.

exceed one million passengers and 13 involve London. In 1998, a total of 16 city pairs exceeded 1 million passengers. In 1999, this number passes to 19.

When considering all international intra-EU passengers, it appears that 42.6% fly to and from the UK, 35.1% to and from Spain and 29.4% to and from Germany.

As the last column of Table 3 suggests, the most important city pairs were largely the same as those in 1998. However, London-München saw its passenger numbers increasing by 32% and progressed from position 15 to position 10.

When looking at the 15 most important city pairs (Table 3 – data based on departure declarations), it appears that all 15

Table 4 outlines the most 'dynamic' city pairs in intra-EU traffic, both in positive and negative sense. It appears that certain city pairs can nearly double in number of passengers

from one year to another (like Edinburgh-Paris, +93%), while other city pairs see their passenger figures reduced by more than a third (like Madrid-Manchester, -37%).

**Table 4: Intra-EU city pairs\* featuring the highest passenger growth / decline between 1998 and 1999**

passenger growth			passenger decline		
rank	Relation		rank	Relation	
1	Edinburgh (UK) - Paris (F)	+93%	1	Madrid (E) - Manchester (UK)	-37%
2	Amsterdam (NL) - Liverpool (UK)	+69%	2	München (D) - Trieste (I)	-26%
3	London (UK) - Genova (I)	+64%	3	Barcelona (E) - Düsseldorf (D)	-23%
4	Paris (F) - Valencia (E)	+60%	4	London (UK) - Salzburg (A)	-19%
5	Dublin (IRL) - East Midlands (UK)	+59%	5	Manchester (UK) - Reus (E)	-19%
6	Dublin (IRL) - Malaga (E)	+57%	6	Athinai (EL) - Barcelona (E)	-19%
7	Birmingham (UK) - München (D)	+54%	7	Amsterdam (NL) - East Midlands (UK)	-18%
8	Lisboa (P) - München (D)	+47%	8	Menorca (E) - Newcastle (UK)	-16%
9	Eindhoven (NL) - London (UK)	+45%	9	Ibiza (E) - Newcastle (UK)	-16%
10	Helsinki (FIN) - Chania (EL)	+42%	10	Dublin (IRL) - Manchester (UK)	-14%

\* only relations with more than 50 000 passengers declared in Origin-Destination for both 1998 and 1999 have been considered.

The busiest airports in Europe are shown in Table 5. The ranking is based on the total number of passengers carried (arrivals and departures) within the EU, both in scheduled and non-scheduled traffic.

**Table 5: TOP-15 AIRPORTS : Total international passengers carried within EU-15**

Rank 1999	Airport	Total passengers carried 1999	change 1998-99 (%)	Rank 1998
1	London / Heathrow	24 098 568	3.0	1
2	Airport system - Paris	21 111 959	8.0	2
3	Amsterdam / Schiphol	20 003 853	8.7	3
4	Frankfurt / Main	15 783 960	9.6	4
5	London / Gatwick	14 388 102	2.2	5
6	Bruxelles / National	14 230 076	8.8	6
7	Palma de Mallorca	13 846 800	10.0	7
8	Copenhagen	12 123 674	:	:
9	Dublin	10 813 253	8.6	9
10	Manchester Internat.	10 301 849	2.3	8
11	München	8 634 178	13.5	11
12	Madrid / Barajas	8 172 549	14.9	13
13	Düsseldorf	8 171 674	6.1	10
14	Stockholm / Arlanda	7 935 192	10.1	12
15	London / Stansted	7 215 294	46.4	21

Compared to 1998, the ranking did not change much, except for the airport of London-Stansted, which experienced an exceptionally high growth (46.4%) and climbed from the 21<sup>st</sup> to the 15<sup>th</sup> position. Other airports with high growth rates (over 10%) were Madrid-Barajas, München and Stockholm-Arlanda.

Also noticeable is that the obviously saturated airport of London-Heathrow progresses only by 3.0% compared to 1998, whereas the Paris airport system, Amsterdam and Frankfurt display relatively high growth rates and obviously did not yet reach their limits. The same phenomenon, however less strong, can be observed in extra-EU traffic (see Table 8).

The French authorities have not declared the various airports of the Paris airport system separately (Charles de Gaulle, Orly and Le Bourget). If the London airports (Heathrow, Gatwick, Luton, London-City and Stansted) would have been grouped in a «London airport system», the total number of passengers carried in 1999 would read 49 800 363, representing an increase of 7.9% compared to 1998.

## Extra-EU traffic

The number of passengers arriving or departing in the EU with an extra-EU origin or destination increased by 5.4% in 1999 compared to the previous year (from 180.9 million to 191.2 million). Extra-EU traffic has thus been growing notably less than intra-EU traffic (+9.3%).

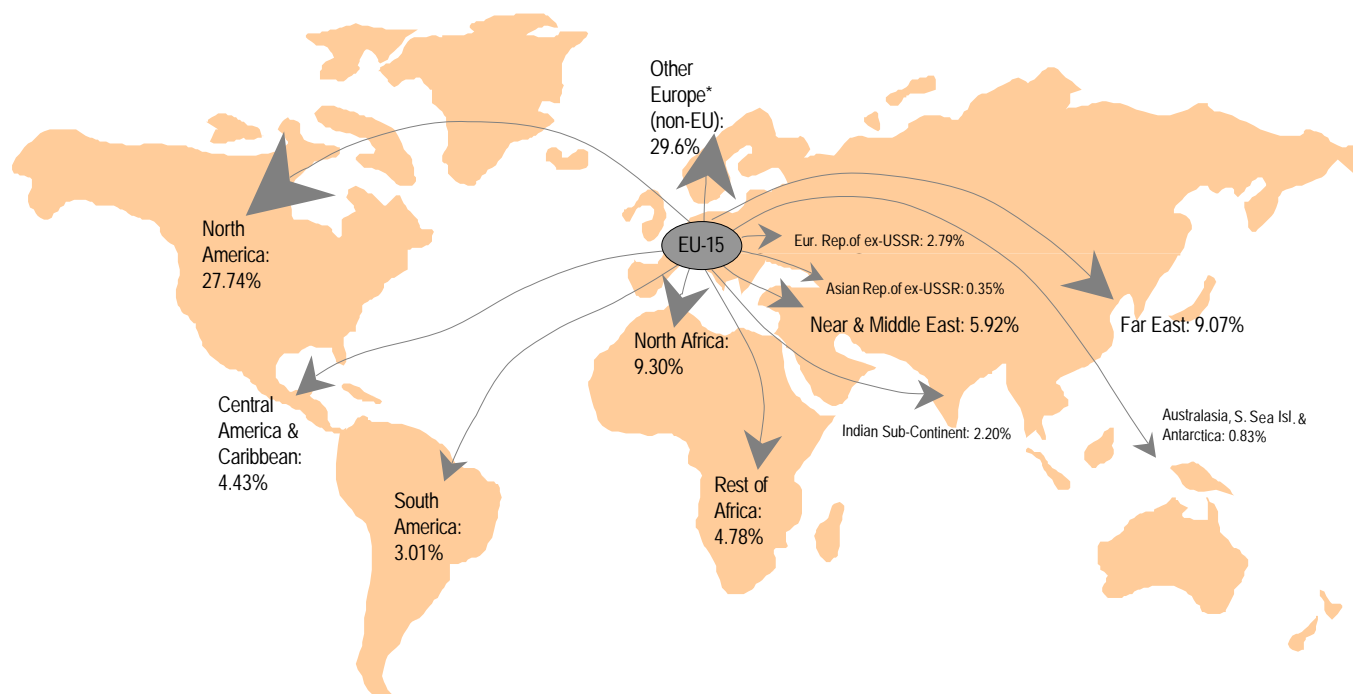
As can be seen in Graph 4, the main share in extra-EU traffic in 1999 is taken by non-EU European countries (29.6% - European Republics of the ex-USSR not considered) closely

followed by North-America (27.7%).

The African continent accounts for 14% of extra-EU traffic; however, North-Africa alone (with popular holiday destinations in Morocco and Tunisia) is responsible for 9.3% of this share.

Far-East destinations account for 9%, the Near and Middle East for nearly 6% of the traffic. All other destinations have a share of well under 5%

**Graph 4 : Extra-EU traffic: share in world destinations – in % of total extra-EU traffic**



\* excluding European Republics of the ex-USSR

Keeping in mind the shares of the various world regions in extra-EU traffic, Table 6 outlines how these developed compared to 1998.

The most important increase was recorded for North Africa: passenger numbers increased by an impressive 29%; a substantial raise when considering the average annual growth rates of previous years. West-African as well as Near and Middle East destinations show a progress of over 10%.

A substantial decrease in passenger numbers (-12%) is recorded for Australasia, the South Sea Islands and Antarctica. Also, air traffic with the Asian Republics of the ex-USSR, displaying very high growth rates in previous years, seems to stagnate (-7.6%). The same can be said for the European Republics of the Ex-USSR.

At a more aggregated level (four 'world regions'), Table 7 details the share of Member States in extra-EU traffic.

The first row however expresses the total share of the Member States in extra-EU traffic. With nearly 30%, the UK leads by a substantial margin, followed by Germany and France with 20.9% and 15% respectively.

**Table 6: Development of extra-EU traffic between 1993 and 1999**

Air traffic between EU and rest of the world (both directions)	Average annual growth (%) 1993-98	Change 1998-99 (%)
Central and Eastern Europe	11.5	6.1
European Rep. of the Ex-USSR	8.9	-7.4
Other Europe	6.5	-4.7
North Africa	3.5	28.7
West Africa	7.3	13.1
Central Africa	2.4	2.5
East Africa	-0.7	7.8
Southern Africa	11.5	6.2
North America	6.9	9.0
Central America and Caribbean	15.5	10.1
South America	8.8	6.2
Near and Middle East	6.2	11.1
Asian Republics of the Ex-USSR	22.0	-7.6
Indian Sub-Continent	8.7	2.0
Far East	9.7	6.2
Australasia, S.Sea Isl. & Antarctica	7.3	-12.0

**Table 7 : Extra-EU traffic to world regions in 1999: shares of individual Member States - in %**

	B	DK	D	EL	E	F	IRL	I <sup>1</sup>	L <sup>1</sup>	NL	A <sup>1</sup>	P	FIN	S <sup>1</sup>	UK	EU-15
Total extra-EU traffic	3.11	:	20.89	2.49	5.71	14.99	1.01	6.64	0.11	8.81	2.71	1.23	1.09	2.05	29.15	100
Europe-except EU	3.25	:	26.49	5.18	7.52	9.59	0.56	5.08	0.20	6.97	4.92	1.30	2.22	4.64	22.10	100
America	2.93	:	16.83	0.67	7.17	12.72	2.23	5.82	0.05	10.34	0.63	1.65	0.40	0.85	37.73	100
Asia & Australasia	1.15	:	21.02	2.45	1.56	14.88	0.04	7.21	0.00	11.68	3.11	0.06	1.13	1.01	34.69	100
Africa	5.86	:	18.53	1.00	3.45	33.61	0.27	11.39	0.23	5.72	2.36	1.59	0.22	0.49	15.26	100

Note : No data available for Denmark - <sup>1</sup> : Flight stage data (see methodological notes).

Germany leads in traffic to non-EU European countries with 26.5% of the passenger carried, well in front of the United Kingdom with 22.1%. Compared to 1998, this represents a slight decrease for Germany (1998 : 27.1%) and a small increase for the UK (1998 : 21.9%).

Instead, the UK has still a clear dominance in traffic with America (37.7%) although the share slightly dropped compared to 1998 (38.3%). The UK is followed by Germany, France and the Netherlands, for which the shares remain practically unchanged. The latter three countries together handle roughly the same traffic with America as the United Kingdom alone.

The same ranking prevails for traffic with Asia and Australasia, although a slight decline for the United Kingdom can be observed here as well (from 35.5% in 1998 to 34.7% in 1999). Germany progressed slightly on these routes.

As in previous years, France holds the first position in traffic with Africa. It should however be said that the high share of 33.6% is mainly due to important traffic with North African destinations. If North Africa would be considered separately, the French share would be even higher. Germany comes second with 18.5% (up from 17.1% in 1998), followed by the United Kingdom and Italy. Compared to 1998, the United Kingdom loses slightly (1998 : 16.0%) and Italy gains in share (1998 : 10.5%).

**Table 8 : TOP-25 AIRPORTS with regards to the total number of pass. carried in extra-EU traffic**

Rank 1999	Airport	Total passengers carried 1999	change 1998-99 (%)	Rank 1998
1	London / Heathrow	30 742 947	3.2	1
2	Airport system - Paris	23 154 185	6.6	2
3	Frankfurt / Main	21 329 717	7.7	3
4	Amsterdam / Schiphol	16 256 367	5.9	4
5	London / Gatwick	13 237 515	8.3	5
6	Madrid / Barajas	5 811 913	11.1	8
7	Bruxelles / National	5 768 162	6.7	7
8	Milano / Malpensa	5 567 574	93.7	13
9	Copenhagen	5 411 118	:	:
10	Roma / Fiumicino	4 911 483	-19.4	6
11	München	4 782 838	12.6	10
12	Manchester / Intern.	4 425 173	-1.2	9
13	Wien / Schwechat	4 363 905	5.3	11
14	Düsseldorf	3 875 351	-3.7	12
15	Stockholm / Arlanda	3 222 006	14.1	14
16	Athinai	2 613 097	1.7	15
17	Helsinki	2 003 435	-1.4	16
18	Lisboa	1 781 871	8.5	17
19	Stuttgart	1 595 294	1.6	18
20	Barcelona	1 470 207	8.6	20
21	Hamburg	1 420 332	-2.8	19
22	Hannover	1 226 077	-1.5	21
23	Dublin	1 190 298	21.3	23
24	Berlin / Tegel	1 027 932	1.7	22
25	Berlin / Schönefeld	980 528	0.6	24

Table 8 shows the ranking of the 25 most important airports (with regards to total passenger traffic, i.e. departures and arrivals) for extra-EU traffic.

The first five positions are taken by very large airports (except for the airport system of Paris, regrouping *Charles de Gaulle*, *Orly* and *Le Bourget* airports), all handling more than 10 million passengers per year.

Some airports in the lower ranks display considerable changes compared to 1998. This is notably the case for certain Italian airports like Milano-Malpensa, displaying a growth of 93.7%. This extraordinary growth is registered after important infrastructural improvements (new terminals, doubling of traffic capacity) were made. Malpensa-airport is one of the 14 priority projects of the transport-TEN (trans-European Networks). Conversely, the airport of Roma-Fiumicino lost nearly 20% of its passengers and passed from rank 6 to rank 10.

Other airports with noticeable changes are Dublin and Stockholm-Arlanda (+21% and +14% respectively) as well as Madrid-Barajas and München, which display an increase in passengers of over 10%.

Apart from Roma-Fiumicino, only a few airports registered decreases in extra-EU passenger numbers : Düsseldorf lost nearly 4%, Hamburg close to 3%, all the other airports lost 2% or less.

## Ø ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The figures presented in this publication have been extracted from the Eurostat aviation database, which for the moment contains international air traffic data from 1993 onwards for EEA countries and Switzerland.

The database is available online and on the annual Aviation CD-ROM.

### **Definitions: Origin/Destination and Flight Stage Data - International Passengers**

Origin/destination data corresponds to On-Flight Origin and Destination (OFOD) information. ICAO 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. Flight stage passengers have been classified according to the flight stage flown.

The difference between origin/destination and flight stage data 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 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 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 origin/destination data.)

### **International Passengers: Origin/Destination and Flight Stage Data - Reporting Countries**

In principle, information provided in this publication is based on origin/destination data rather than flight stage data. Origin/destination data have been used where available, but flight stage data have been accepted for those countries where no origin/destination data were reported. That is, for all Figures and Tables, origin/destination data have been used for Belgium (B), Germany (D), Greece (EL), Spain (E),

France (F), Ireland (IRL), Finland (FIN), the Netherlands (NL), Portugal (P) and the United Kingdom (UK); flight stage data only for Italy (I), Luxembourg (L), Austria (A) and Sweden (S). Denmark supplied no data in for 1998 and 1999. Belgium supplied data (O/D) for Brussels only and Ireland provided data for Dublin, Shannon and Cork.

**Important:** mainly in long-haul extra-EU traffic, passenger volumes declared according to the flight stage principle can be underestimated. Methodologically, this can't however be avoided.

Passenger data refer to international passengers, i.e. national traffic has been excluded.

### **World regions**

The component countries comprising the five world regions (EU, Europe-except EU, America, Asia & Australasia, Africa) as defined for Table 7 relating to extra-EU traffic, can be obtained upon request. The world regions of Asia and Australasia (including South Sea Islands and Antarctica) have been grouped together in the interest of clarity.

The 'world regions' as defined in this publication corresponds to the nomenclature used by all units of Eurostat (OJ L243, 28.9.2000, page 14 – Commission Regulation (EC) 2032/2000 on the nomenclature of countries and territories for the external trade statistics of the Community and statistics of trade between Member States).

### **Data from Sweden**

Flight stage data reported by Swedish authorities up to and including 1998 do not take into account direct transit passengers (see also last paragraph in Origin/Destination and Flight Stage Data definitions in the left column of this page). This has however only little influence on data related to Sweden and Swedish airports presented in this publication.

### **Estimates for Denmark**

For Denmark, estimates (1998 and 1999) were made for departures by taking the corresponding arrival figures reported by other countries.

### **Intra-EU passenger traffic**

The basic figures used to calculate the percentages are departure figures or estimates thereof. For each pair of countries, the total of the two countries' departure figures is divided by the sum of the EU departure figures (actual and estimated) to obtain the percentages shown in the table.

### **Table 4: Intra-EU growth/decline of city pairs**

This ranking was established when the declaring country supplied either origin/destination or flight stage data for both 1998 and 1999. Declaring origin/destination in one year and flight stage in the other year would lead to misinterpretations.

**This publication** was prepared with the assistance of Marion Biré (data and graphs) and Jelle Bosch (commentary), Artemis Information Management.

# Further information:

## ○ Databases

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## For information on methodology

Vincent Tronet, Eurostat/C2, L-2920 Luxembourg, Tel. (352) 4301 32906, Fax (352) 4301 32289, E-mail: vincent.tronet@cec.eu.int

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