

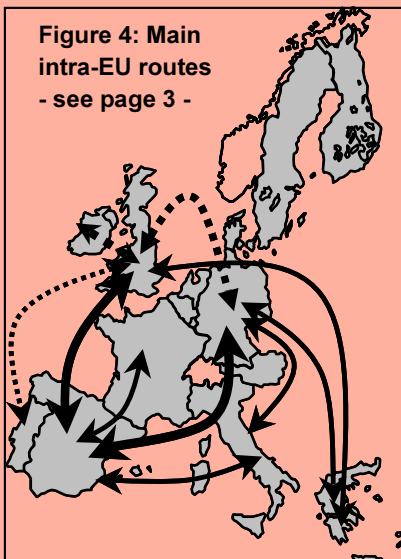
Statistics in focus

TRANSPORT

THEME 7 – 1/2000

Contents

Highlights	1
Introduction.....	1
Evolution 1993-1997	2
Share of intra- and extra-EU flights in total passenger traffic.....	2
Intra-EU passenger traffic.....	3
Extra-EU passenger traffic.....	5



Manuscript completed on: 20.12.99
ISSN 1562-1324
Catalogue number: CA-NZ-00-001-EN-I
Price in Luxembourg per single copy
(excl. VAT): EUR 6

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Air transport Passenger traffic 1993-1997

Evangelos Pongas

Highlights

- Intra-EU air traffic: 153.6 million passengers in 1997 (an increase of 39.4% compared to 1993, and 8.1% compared to 1996)
- Extra-EU air traffic: 171.2 million passengers in 1997 (an increase of 38.7% compared to 1993, and 8.9% compared to 1996)
- In average, 70% of total air traffic of EU Member States is intra-EU, 30% extra-EU
- 12.7% of total international intra-EU traffic in 1997 is between UK and Spain (both directions) alone, 10% between Germany and Spain (both directions)
- The three most important intra-EU town-to-town routes in 1997 were: London to Dublin (3.7 million passengers), London to Amsterdam (3.0 million) and London to Paris (2.8 million)
- Three main routes in extra-EU traffic: UK-North America (share: 9.9% of total extra-EU traffic), Germany-rest of Europe (6.3%), UK-rest of Europe (5.5%)

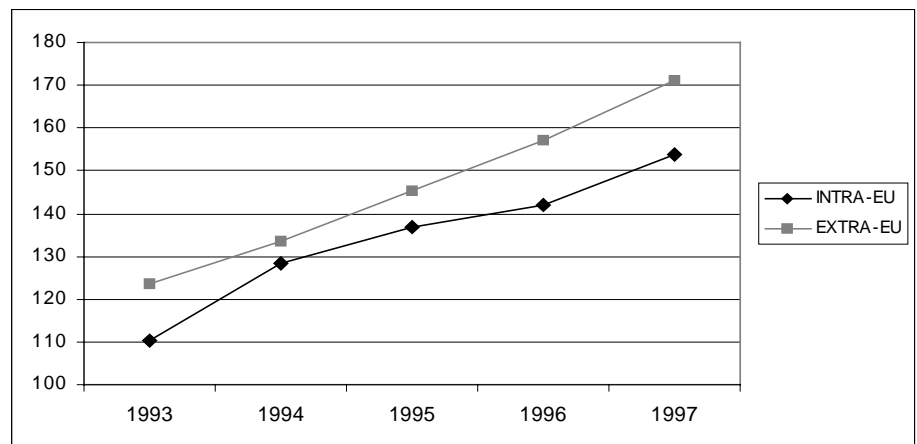
Introduction

Since 1993, Eurostat has been collecting and processing various aviation data at EU-level. The collection of these data is on voluntary base - Member States have transmitted a certain number of data on passenger and freight transport; these data have all been stored in the Eurostat Aviation database. In the present « Statistics in Focus », Eurostat offers an insight of the main contents of the database and comments on recent data. At present, the database covers data from 1993 to 1997 (included).

Reference should be made to the annual publication « International Transport by Air (intra and extra EU): 1997 data » (Eurostat 7A series), where the individual annual results are outlined, including individual airport rankings.

Figure 1: Evolution of intra-EU passenger traffic and EU traffic to/from extra-EU (in million passengers)

Note: Intra-EU traffic based on departures -1993-1996: estimates for FIN - 1997: estimates for EL



Data & graphics: Marion Biré - Commentary: Jelle Bosch

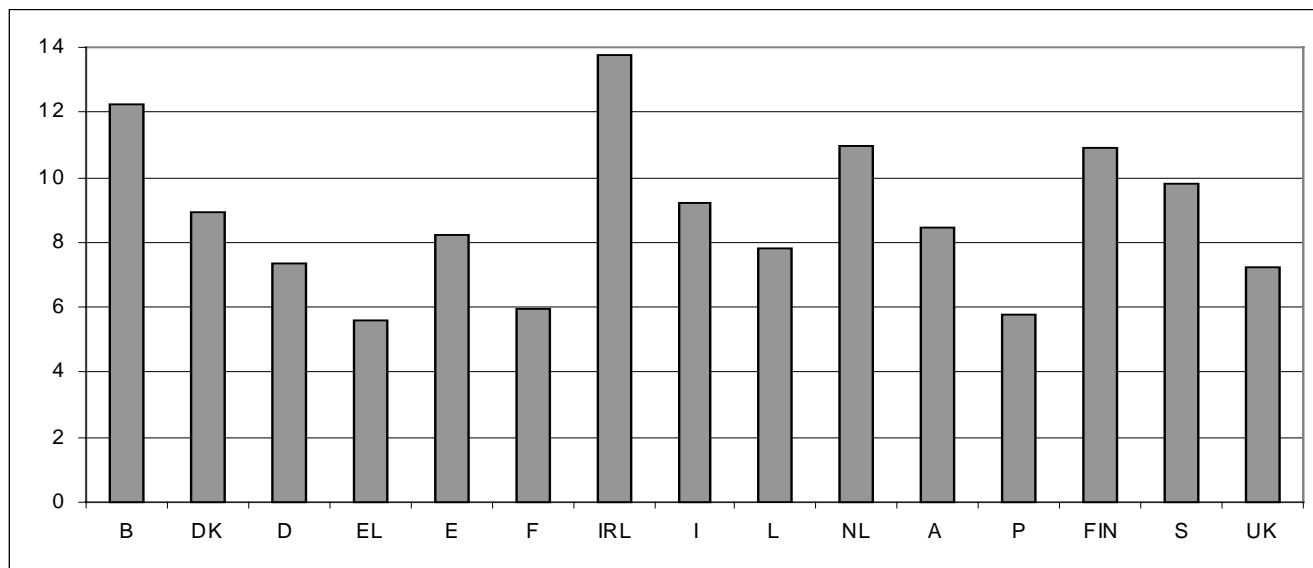
Evolution 1993-1997

Figure 1 on the previous page shows how the volume of intra-European passenger traffic increased from 110.1 million passengers in 1993 to 153.6 million in 1997. This corresponds to a progression of 39.4% (average annual growth : 8.7%). Over the same period, the increase in the volume of extra EU-

passengers was roughly the same : 38.7% (from 123.4 to 171.2 million passengers – average annual increase of 8.5%).

The growth of intra-European traffic has been less consistent : faster for the period 1993-1995 than for the period 1995-1997.

Figure 2: Average annual growth of passenger traffic 1993-1997, by country* - in %



* Note: EL: 1993-1995, IRL: 1994-1996

Between 1993 and 1997, the number of air passengers has been most increasing in Ireland and Belgium (average annual growth of over 12%). Finland and the Netherlands present an

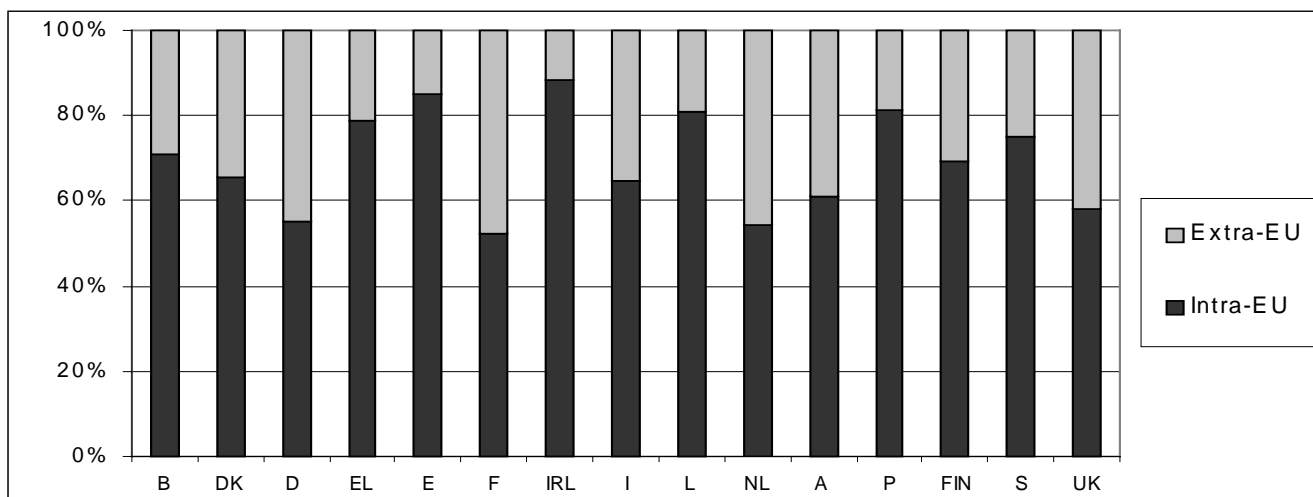
increase of over 10% whereas in all other Member States, average annual growth is situated between 5 and 10%.

Share of intra- and extra-EU flights in total passenger traffic

There are notable differences between the Member States concerning the distribution of intra and extra-EU traffic : France, the Netherlands, Germany and the United Kingdom all

feature a share of over 40% extra-EU traffic and confirm their position of European gateway countries.

Figure 3 : Distribution between intra-EU and extra-EU passenger traffic in 1997



However, only a few very large airports in these countries contribute to this high proportion.

The average EU proportion could be established at 69.4% intra-EU traffic and 30.6% extra-EU traffic.

The general situation has not changed much since 1993 : the proportion between intra and extra-EU traffic remained largely the same. Fluctuations of over 5% are only detected for Luxembourg, where there has been a clear shift towards more intra-EU traffic (from 72.8% in 1993 to 81.1% in 1997).

Intra-EU passenger traffic

Figure 4: Intra-EU traffic 1997 : 70% of the total volume at a glance

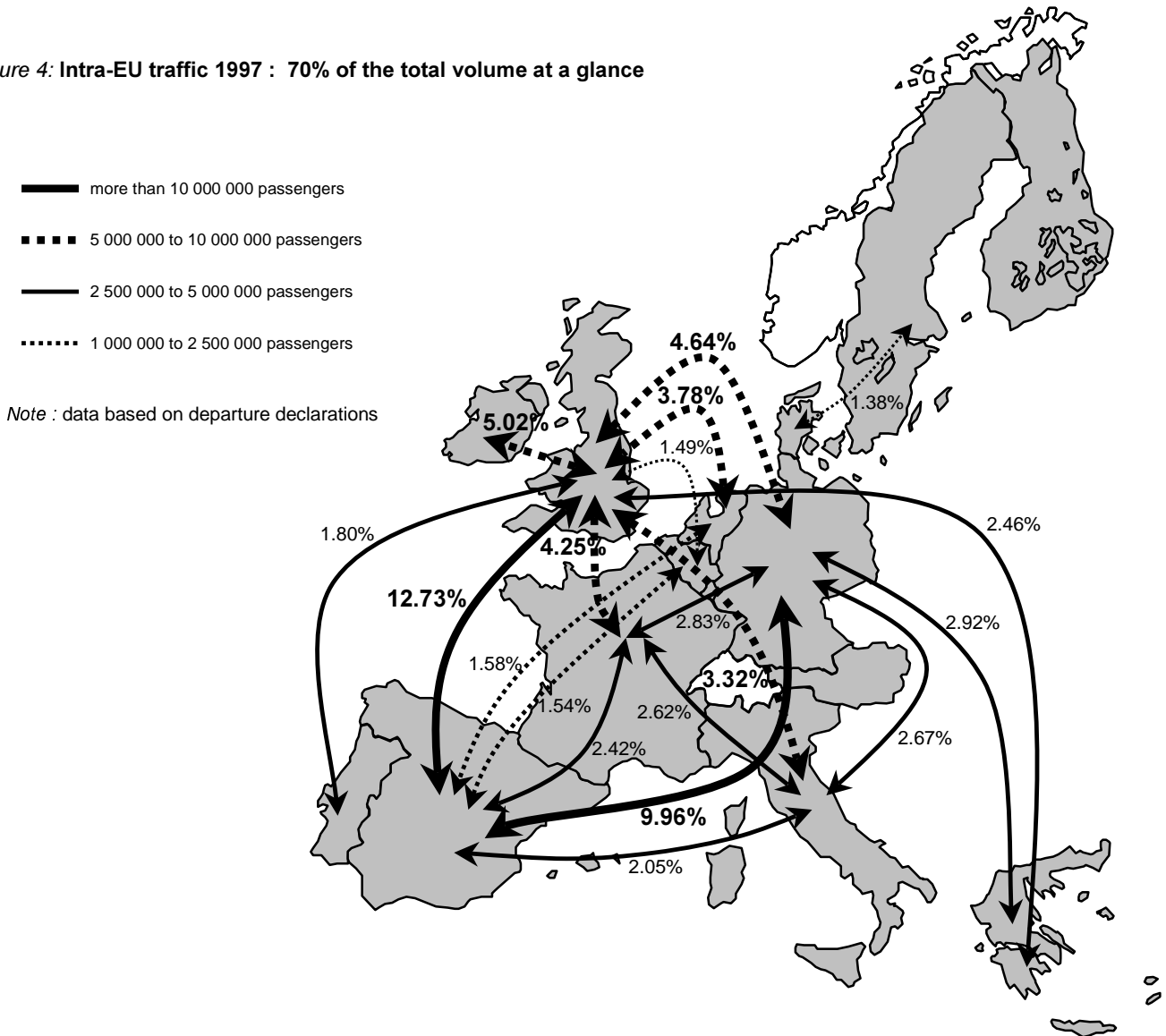


Figure 4 shows the most important country-to-country routes in intra-EU traffic in 1997. All flows displayed in figure 4 taken together correspond to 69.5% of the total intra-EU traffic.

Two flows feature a volume of more than 10 million passengers : United Kingdom(UK)-Spain/Spain-UK and Germany-Spain/Spain-Germany. The first flow represents 12.7% of the total intra-EU traffic ; this corresponds to 19.5 million passengers, the second flow represents nearly 10%, corresponding to 15.3 million passengers.

The flow UK-Ireland/Ireland-UK is in third position with 5.0% (7.7 million passengers) of the total intra-EU traffic, fourth is the flow UK-Germany/Germany-UK with 4.6% (7.1 million passengers) and fifth is the flow UK-France/France-UK with 4.2% (6.5 million passengers).

The flow with the least traffic on this map is Denmark-Sweden/Sweden-Denmark with 1.4% of total intra-EU traffic. This corresponds however still to 2.1 million passengers.

Table 1 : Intra-EU traffic 1997: main town-to-town routes

Town-to-town routes		Number of passengers	Scheduled passengers (%)	Non-scheduled Passengers (%)
LONDON	DUBLIN	3729781	99.73	0.27
LONDON	AMSTERDAM	3002106	99.91	0.09
LONDON	PARIS	2810722	99.78	0.22
FRANKFURT	LONDON	1776014	99.94	0.06
LONDON	BRUXELLES	1363645	99.75	0.25
LONDON	MILANO	1338022	92.72	7.28
ROME	LONDON	1333191	93.49	6.51
PALMA DE MALLORCA	DÜSSELDORF	1303005	91.21	8.79
LONDON	MALAGA	1171833	30.63	69.37
LONDON	MADRID	1165475	98.69	1.31
LONDON	STOCKHOLM	1122061	89.16 ¹	10.84 ¹
PARIS	ROME	1108103	93.98	6.02
LONDON	MÜNCHEN	1040233	99.87	0.13
MADRID	PARIS	1033461	99.21	0.79
LONDON	PALMA DE MALLORCA	1009606	14.12	85.88
FRANKFURT	PARIS	966050	99.82	0.18
LONDON	ATHINAI	961720	79.71 ¹	20.29 ¹
PARIS	MILANO	932004	99.59	0.41
AMSTERDAM	PARIS	893689	99.71	0.29
LONDON	BARCELONA	880049	92.74	7.26
LONDON	TENERIFE	844888	4.88	95.12
PALMA DE MALLORCA	MANCHESTER	810734	0.68	99.32
LONDON	FARO	804369	25.19	74.81
PALMA DE MALLORCA	FRANKFURT	798389	81.26	18.74
LONDON	WIEN	772610	97.77	2.23
DÜSSELDORF	LONDON	742295	99.96	0.04
MANCHESTER	TENERIFE	731623	0.00	100.00
HELSINKI	STOCKHOLM	708111	97.17 ¹	2.83 ¹
LISBOA	LONDON	685343	97.39	2.61

Note : all figures are based on origin/destination data, except Sweden, where flight-stage data were used (see meth. notes).

¹ : Scheduled / non-scheduled details not given for S and EL ; estimates based on declarations from UK and FIN respectively.

Table 1 presents the 29 most important intra-EU town-to-town routes based on departure declarations of airports of both towns. Thus, the 3.7 million passengers recorded for the most important route refer both to London-Dublin and Dublin-London flights. The ranking has been established on the base of scheduled and non-scheduled flights.

Fifteen out of twenty routes have a volume of over one million passengers. Fourteen routes involve London.

One should be aware that in the town-to-town routes, traffic to and from a given city refers to the cumulated traffic of various airports attributed to that town. 'London' for instance refers to traffic to and from Gatwick, Heathrow, Stansted, Luton and London-City airports.

The last two columns of table 1 outline the share of scheduled and non-scheduled flights of the particular route. If only scheduled flights had been considered, certain important routes wouldn't appear in the table. The routes in question are all typical holiday destinations : about three quarters of the London/Faro traffic appears to be non-scheduled flights ; London/Tenerife and Palma de Mallorca/Manchester are close to complete non-scheduled traffic. With a volume of more than 730 000 passengers, Manchester/Tenerife is the only relation in the table featuring 100% charter flights.

One could expect similar effects for routes like Palma de Mallorca/Frankfurt, Palma de Mallorca/Düsseldorf or London/Barcelona ; surprisingly, these relations offer however a high share of scheduled traffic.

Extra-EU passenger traffic

Table 2 : Development of extra-EU traffic 1993-1997

Air traffic between EU and rest of the world (both directions)	change (%)	change (%)	change (%)	change (%)	Average annual
	1993-1994	1994-1995	1995-1996	1996-1997	growth (%) 1993-1997
Central and Eastern Europe	14.36	12.04	10.79	5.50	10.62
European Republics of the Ex-USSR	11.23	18.30	8.26	12.40	12.49
Other Europe	5.10	10.99	6.02	6.64	7.16
North Africa	-1.96	-0.17	10.58	8.19	4.02
West Africa	5.09	3.45	9.10	10.23	6.93
Central Africa	-2.72	7.57	4.73	-5.82	0.79
East Africa	9.93	1.23	2.29	-2.97	2.52
Southern Africa	10.72	12.50	29.09	12.47	15.97
North America	6.40	7.08	6.61	8.04	7.03
Central America and Caribbean	22.50	11.57	23.13	15.24	18.01
South America	13.71	13.41	5.62	7.50	10.00
Near and Middle East	3.16	10.65	4.49	3.25	5.34
Asian Republics of the Ex-USSR	73.36	28.22	6.67	13.71	28.14
Indian Sub-Continent	14.40	13.49	7.02	2.67	9.29
Far East	21.19	10.32	10.12	8.66	12.46
Australasia, South Sea Islands & Antarctica	3.72	7.38	-8.54	3.65	1.36

Table 2 outlines the development of the air traffic between the EU and the rest of the world. The last column of this table shows the average growth rate over the period 1993-1997.

The highest average growth rate (28.1%) is recorded for the traffic between the EU and the Asian Republics of the former USSR. Passenger volumes for these relations are however relatively low. The impressive growth between 1993 and 1994 (+73%) is mainly responsible for this high rate.

Central American and Caribbean destinations show an average growth rate of 18%. Here, passenger volumes have been steadily increased. A steady increase (average annual increase : nearly 16%) can also be recorded for Southern Africa.

Traffic between the EU and Central and Eastern Europe has been growing less in recent years: from a 14.4% increase for the period 1993-1994 to a moderate 5.5% for the period 1996-1997. Growth of traffic with the Far East follows the same pattern : from 21.2% for the period 1993-1994 to 8.6% for the period 1996-1997.

Passenger volumes for North Africa have been slightly decreasing until 1995. From 1996 onwards, this trend was however discontinued.

Finally, traffic with Central Africa, Eastern Africa as well as with Australasia, South Sea Islands & Antarctica shows virtually no progression over the period 1993-1997.

Table 3 : Extra-EU traffic to world regions in 1997: shares of individual Member States - in %

	B	DK ¹	D	EL	E	F	IRL	I	L ¹	NL	A	P	FIN	S ¹	UK	EU-15
Europe-except EU	2.85	5.49	26.58	:	6.99	8.88	5.49	5.24	0.34	6.01	4.75	1.04	2.11	4.08	20.17	100
America	2.38	1.15	16.77	:	6.88	12.95	1.82	6.64	0.00	10.73	0.69	1.53	0.48	0.54	37.42	100
Asia & Australasia	1.32	2.30	20.97	:	1.69	13.99	0.01	8.39	0.00	11.10	2.58	0.18	1.12	0.82	35.52	100
Africa	5.19	0.30	19.26	:	2.79	34.37	0.20	10.80	0.26	5.75	2.17	1.70	0.25	0.47	16.47	100

Note : No data available for Greece. -¹ : Flight stage data (see methodological notes).

Table 3 outlines the share of Member States in total extra-EU traffic. In this table, extra-EU traffic is split in four 'world regions': Europe-except EU, America (north, central and south), Asia & Australasia and Africa.

Germany is responsible for 26.6% of all air traffic with 'Europe-

except EU', well in front of the United Kingdom (20.2%). Instead, the United Kingdom has a very clear dominance (37.4%) in traffic with America, followed far behind by Germany, France and the Netherlands (with 16.8%, 12.9% and 10.7% respectively). The four countries together handle more than 75% of the entire traffic to America.

The United Kingdom prevails also in traffic with Asia & Australasia, although the share is less strong : 35.5% of the total traffic, while Germany comes second with nearly 21%.

In traffic with Africa, the United Kingdom comes third with 16.5% share. France dominates this market with 34.4%. North-Africa destinations are responsible for this high share. Germany is on second position with 19.3% of the traffic.

Table 4 : Share of main routes in extra-EU traffic in 1997

Main routes in extra-EU traffic		Share in total Extra-EU traffic	cumulated share
United Kingdom	North America	9.97%	9.97%
Germany	Other Europe	6.30%	16.27%
United Kingdom	Other Europe	5.46%	21.73%
Germany	North America	3.99%	25.72%
France	North America	3.08%	28.80%
United Kingdom	Far East	2.68%	31.48%
France	North Africa	2.50%	33.99%
Netherlands	North America	2.48%	36.46%
France	Other Europe	2.18%	38.65%
Germany	Far East	1.90%	40.55%
United Kingdom	Near and Middle East	1.70%	42.25%
Germany	Central and Eastern Europe	1.67%	43.91%
Germany	North Africa	1.66%	45.58%
Spain	Other Europe	1.62%	47.19%
Netherlands	Other Europe	1.38%	48.58%
France	Far East	1.37%	49.95%
Denmark	Other Europe	1.35%	51.30%
Italy	North America	1.29%	52.59%
United Kingdom	Central America and Caribbean	1.11%	53.70%
Sweden	Other Europe	1.05%	54.76%

Taking the 'world regions' at a more detailed level, Table 4 illustrates well how major routes relate to the various Member States. Figures in the table show the individual share of a

given route (first column) and the cumulated share (second column). The 20 routes outlined in Table 4 represent nearly 55% of the total extra-EU traffic in 1997.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

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 Austria (A), Belgium (B), Germany (D), Greece (EL), Spain (E), France (F), Ireland (IRL), Finland (FIN), Italy (I), the

Netherlands (NL), Portugal (P) and the United Kingdom (UK); flight stage data only for Luxembourg (L), Sweden (S) and Denmark (DK). 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 (Denmark, Luxembourg and Sweden) can be underestimated. This should be kept in mind when looking at table 3 and table 4, and -at a lesser degree- at table 2. 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 3 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 geonomenclature 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).

Estimates for Greece and Finland

For Greece (1997) and Finland (1993 to 1996), estimates were made for departures by taking the corresponding arrival figures reported by other countries. The estimates for Greece and Finland therefore do not take into account the traffic between these two countries.

Data for Sweden

For 1993 and 1994, Sweden supplied data relating to 3 major airports only. Data for 1995, 1996 and 1997 relate to all airports. Comparisons are thus difficult. For consistency reasons, 1993 and 1994 data for Sweden have thus been taken from SIKÄ – Swedish Institute for Transport and Communication Analysis / Swedish Civil Aviation Administration.

Figure 4 : 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.

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