

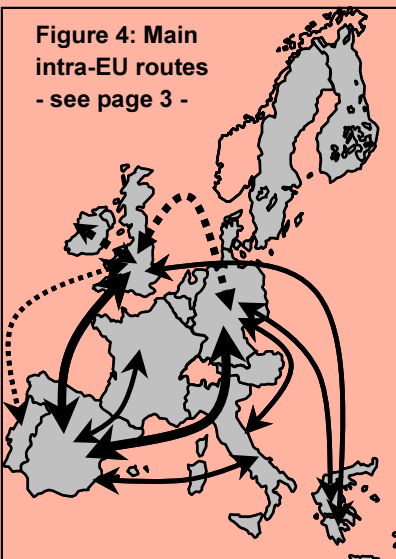
Statistics in focus

TRANSPORT

THEME 7 – 1/2001

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Air transport Passenger traffic 1993-1998

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Highlights

In international intra-EU air traffic, 167.9 million passengers were carried in 1998 - an increase of 9.3% compared to 1997. The average annual increase between 1993 and 1997 was 8.7%.

176.0 million passengers were carried in extra-EU air traffic in 1998. Here, the increase was less important: 2.8% compared to 1997. The average annual increase between 1993 and 1997 was 8.5%.

In 1998, 65% of total international air traffic of EU Member States is between EU Member States, 35% of the traffic is extra-EU (see Figure 3).

When looking at country to country traffic, it appears that more than 13% of the total international intra-EU traffic in 1998 was between the United Kingdom and Spain alone, close to 10% between Germany and Spain.

The three most important intra-EU town-to-town routes (both directions) in 1998 were: London-Dublin (4.0 million passengers), London-Amsterdam (3.3 million) and London-Paris (2.8 million).

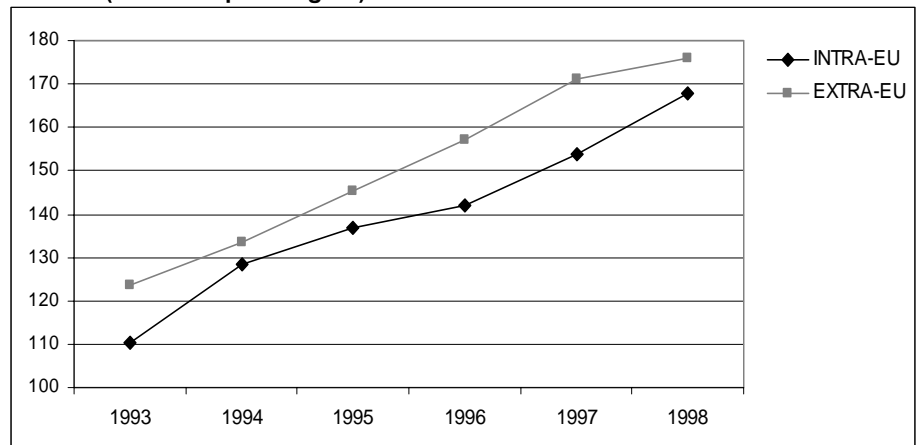
The three main routes in extra-EU traffic are: United Kingdom-North America (share: 11.6% of total extra-EU traffic), Germany-rest of Europe (6.6%) and United Kingdom-rest of Europe (6.1%)

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 1998 (included).

Reference should be made to the annual publication « International Transport by Air (intra and extra EU) » (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 - Estimates: 1993-96 for FIN; 1997 for EL; 1998 for DK.

Evolution 1993-1998

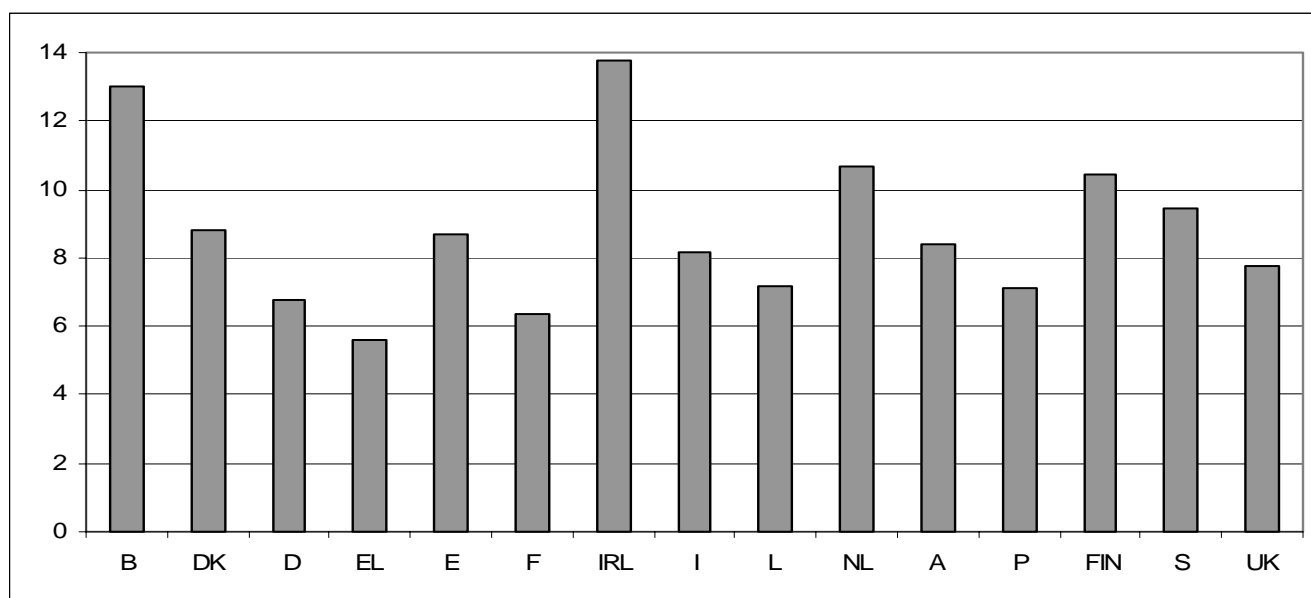
Figure 1 on the previous page shows how the volume of intra-European passenger traffic increased from 110.1 million passengers in 1993 to 167.9 million in 1998. This corresponds to a progression of 52.4% (average annual growth : 8.8%).

Over the same period, the increase in the volume of extra EU-passengers was not quite as important : 42.6% (from 123.4 to 176.0 million passengers – average annual increase of 7.3%).

The steady upward trend for the period 1993-1997 is not carried on in 1998 : where 1996/1997 showed an increase of nearly 9%, this number falls back to 2.8% for 1997/1998.

The growth of intra-European traffic has been less consistent : the period 1995/1996 shows a slight drop in the generally high growth rates.

Figure 2: Average annual growth of passenger traffic 1993-1998, by country* - in %



* Note: DK: estimates for 1998

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

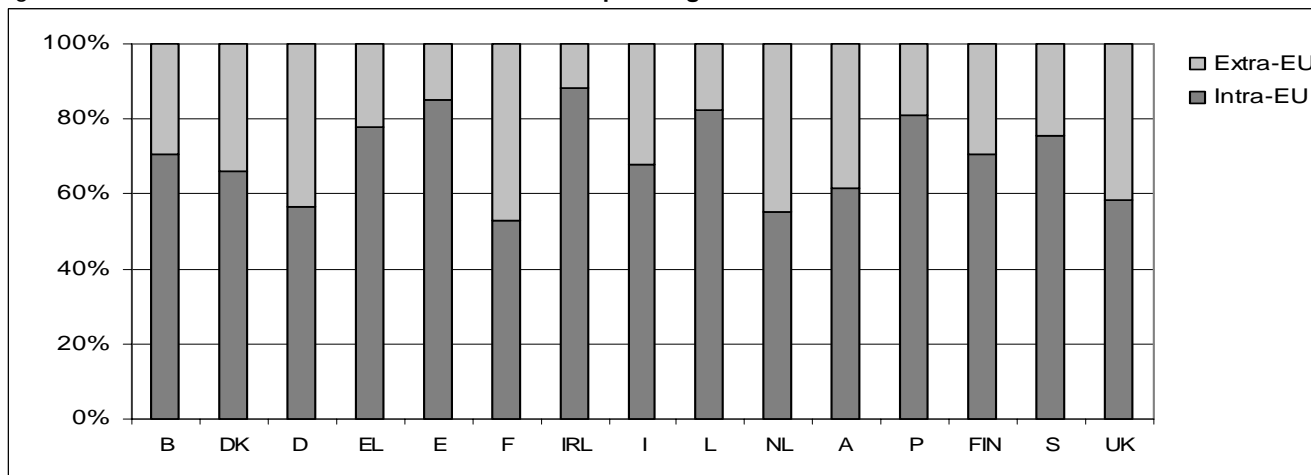
increase of over 10% whereas in all other Member States, average annual growth is situated between 5 and 10%.

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 1998



* Note: DK: estimates

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

In 1998 and at Community level, the average EU proportion could be established at 65% intra-EU traffic (1997 :69%) and 35% extra-EU traffic (1997 :31%).

In the individual Member States, 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 82.5% in 1998).

Intra-EU passenger traffic

Figure 4: Intra-EU traffic 1998 : 70% of the total volume at a glance

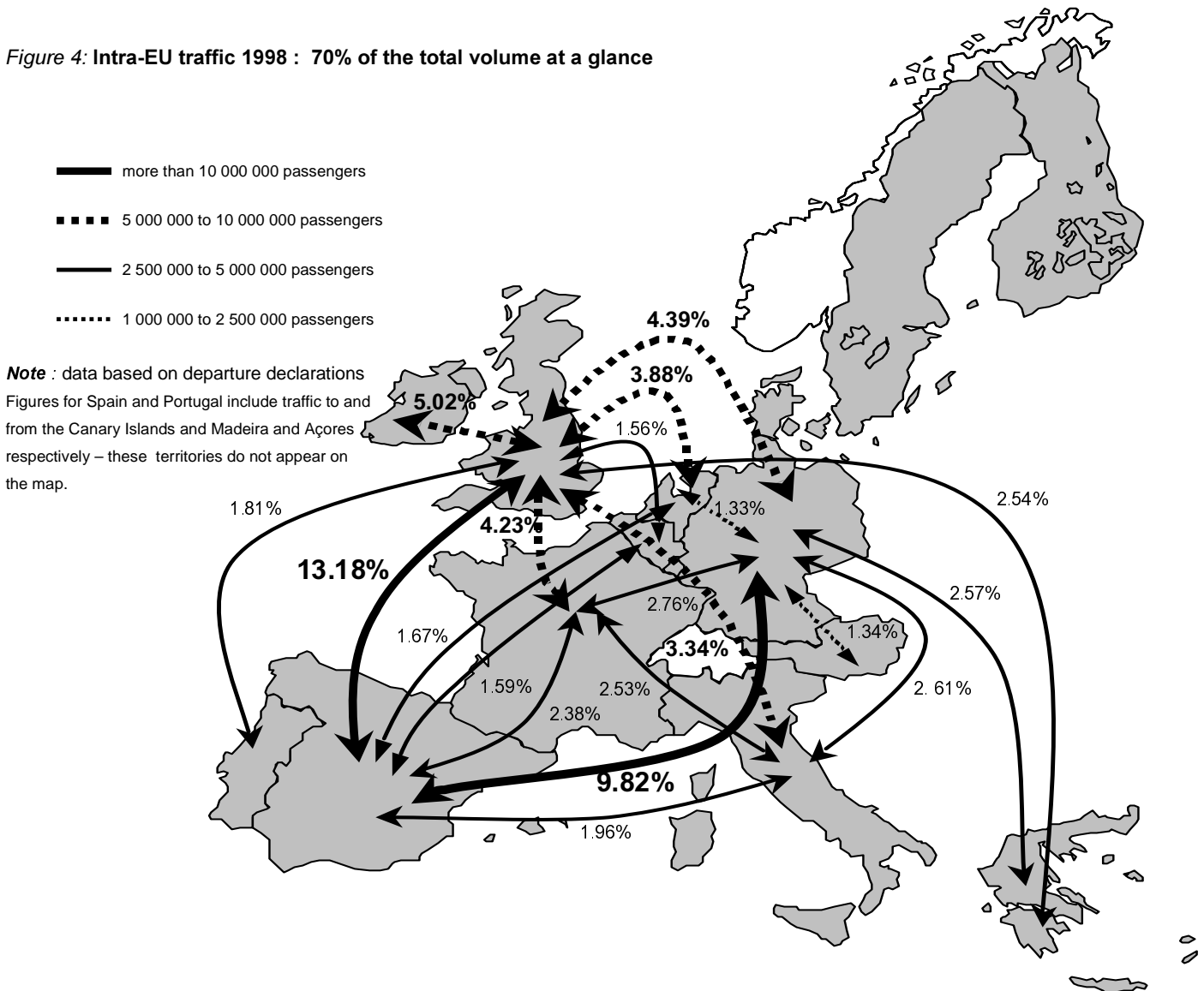


Figure 4 shows the most important country-to-country routes in intra-EU traffic in 1998. All flows displayed in figure 4 taken together correspond to 70% of the total intra-EU traffic.

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 13.8% of the total intra-EU traffic ; this corresponds to 22.1 million passengers, the second flow represents nearly 10%, corresponding to 16.4 million passengers.

The flow UK-Ireland/Ireland-UK is in third position with 5.0% (8.4 million passengers) of the total intra-EU traffic, fourth is the flow UK-Germany/Germany-UK with 4.4% (7.3 million passengers) and fifth is the flow UK-France/France-UK with 4.2% (7.1 million passengers).

The flows with the least traffic on this map are Germany-Austria/ Austria-Germany and Germany-Netherlands/Netherlands-Germany, both with 1.3% of total intra-EU traffic. This corresponds however still to 2.2 million passengers.

Table 1 : Intra-EU traffic 1998: main town-to-town routes

Town-to-town routes		Number of passengers	Scheduled passengers (%)	Non-scheduled passengers (%)
LONDON	DUBLIN	4086611	99.82	0.18
LONDON	AMSTERDAM	3313799	99.92	0.08
LONDON	PARIS	2828480	99.71	0.29
FRANKFURT	LONDON	1905705	99.93	0.07
LONDON	MILANO	1481223	95.75	4.25
LONDON	BRUXELLES	1448736	99.90	0.10
ROME	LONDON	1444071	96.31	3.69
PALMA DE MALLORCA	DÜSSELDORF	1418941	96.44	3.56
LONDON	MALAGA	1277193	30.98	69.02
LONDON	STOCKHOLM	1256375	48.62	4.75
LONDON	MADRID	1232830	98.80	1.20
LONDON	PALMA DE MALLORCA	1173771	25.77	74.23
MADRID	PARIS	1117083	98.97	1.03
ROME	PARIS	1101148	92.80	7.20
LONDON	MÜNCHEN	1050835	99.73	0.27
ATHINAI	LONDON	1018765	81.54*	10.81*
FRANKFURT	PARIS	989664	99.87	0.13
LONDON	BARCELONA	987892	96.94	3.06
MILANO	PARIS	958079	97.66	2.34
LONDON	TENERIFE	952624	6.79	93.21
AMSTERDAM	PARIS	906281	99.73	0.27
LONDON	NICE	870684	97.27	2.73
LONDON	FARO	867243	25.89	74.11
PALMA DE MALLORCA	MANCHESTER	856725	5.29	94.71
TENERIFE	MANCHESTER	829407	0.00	100.00
WIEN	LONDON	809557	98.54	1.46
LONDON	LISBOA	789701	98.95	1.05
BARCELONA	PARIS	764741	97.09	2.91
LISBOA	PARIS	760445	87.48	12.52

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

* : Scheduled / non-scheduled details not given for all passengers.

Table 1 presents the 29 most important intra-EU town-to-town routes in 1998 based on departure declarations of airports of both towns. Thus, the 4 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.

Sixteen routes have a volume of over one million passengers. Of those sixteen routes, thirteen 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 829 000 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 'holiday'-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 (%) 1994-1995	change (%) 1995-1996	change (%) 1996-1997	change (%) 1997-1998	Average annual growth (%) 1993-1998
Central and Eastern Europe	12.04	10.79	5.50	15.03	11.49
European Republics of the Ex-USSR	18.30	8.26	12.40	-4.22	8.93
Other Europe	10.99	6.02	6.64	2.14	6.14
North Africa	-0.17	10.58	8.19	1.48	3.51
West Africa	3.45	9.10	10.23	8.74	7.29
Central Africa	7.57	4.73	-5.82	9.28	2.44
East Africa	1.23	2.29	-2.97	-12.49	-0.68
Southern Africa	12.50	29.09	12.47	9.12	14.56
North America	7.08	6.61	8.04	6.80	6.98
Central America and Caribbean	11.57	23.13	15.24	9.12	16.17
South America	13.41	5.62	7.50	5.15	9.01
Near and Middle East	10.65	4.49	3.25	9.46	6.16
Asian Republics of the Ex-USSR	28.22	6.67	13.71	0.33	22.02
Indian Sub-Continent	13.49	7.02	2.67	6.67	8.76
Far East	10.32	10.12	8.66	-1.11	9.61
Australasia, South Sea Islands & Antarctica	7.38	-8.54	3.65	37.53	7.74

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 1993-1998.

The highest average growth rate (22%) 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. As can be seen in Table 4, the positive rates of the subsequent years are far less important. Compared to 1997, 1998 passenger volumes remained virtually unchanged.

Central American and Caribbean destinations show an average growth rate of 16%. Here, passenger volumes have been steadily increased. A steady increase (average annual

increase : nearly 15%) can also be recorded for Southern Africa. In both cases, the increase in 1998 was however less important than in previous years.

Traffic between the EU and Central and Eastern Europe has been growing fast over the recent years: since 1993, the annual increase in passenger volumes was always over 10%, except in 1997, where volumes were up by a moderate 5.5% compared to 1996. East African destinations are less favoured: the slight decrease in 1997 (-3%) accentuated in 1998 (-12%).

Finally, traffic with Australasia, South Sea Islands & Antarctica shows certain fluctuations. Noticeable is the highest single annual increase (37.5%) in passenger volumes in 1998 compared to 1997.

Table 3 : Extra-EU traffic to world regions in 1998: shares of individual Member States - in %

	B	DK ¹	D	EL	E	F	IRL	I	L ²	NL	A	P	FIN	S ²	UK	EU-15
Europe-except EU	3.34	:	27.10	4.87	7.92	9.41	0.47	5.14	0.33	6.74	5.07	1.23	2.24	4.24	21.90	100
America	2.84	:	16.70	0.77	6.91	12.77	2.03	5.60	0.00	10.58	0.67	1.62	0.46	0.71	38.35	100
Asia & Australasia	1.24	:	20.48	2.11	1.54	14.93	0.02	7.64	0.00	11.49	2.97	0.16	1.17	0.79	35.45	100
Africa	5.71	:	17.16	0.98	3.02	35.78	0.28	10.49	0.26	5.92	2.03	1.79	0.16	0.38	16.04	100

¹: No data available for Denmark - ²: 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 27.1% of all air traffic with 'Europe-except EU', well in front of the United Kingdom (21.9%).

Instead, the United Kingdom confirms by a large margin the dominance (38,3%) in traffic with America, followed far behind by Germany, France and the Netherlands (with 16.7%, 12.7% and 10.6% respectively). The four countries together handle nearly 80% of the entire EU traffic to America.

The United Kingdom prevails also in traffic with Asia & Australasia, although the share is less strong : 35.4% of the total traffic, while Germany comes second with nearly 20.5%.

In traffic with Africa, the United Kingdom comes third with 16% share. France dominates this market with close to 36%. North-Africa destinations are mainly responsible for this high share. Germany is on second position with 17.2% (1997 : 19.3%) of the traffic.

Table 4 : Share of main routes in extra-EU traffic in 1998

Main routes in extra-EU traffic		Share in total Extra-EU traffic	Cumulated share
United Kingdom	North America	11.56%	11.56%
Germany	Other Europe	6.57%	18.13%
United Kingdom	Other Europe	6.14%	24.27%
Germany	North America	4.40%	28.67%
France	North America	3.40%	32.07%
France	North Africa	2.85%	34.92%
United Kingdom	Far East	2.84%	37.76%
Netherlands	North America	2.79%	40.56%
France	Other Europe	2.36%	42.92%
Germany	Far East	2.06%	44.98%
Spain	Other Europe	1.94%	46.92%
United Kingdom	Near and Middle East	1.92%	48.84%
Germany	Central and Eastern Europe	1.89%	50.73%
Netherlands	Other Europe	1.65%	52.37%
Germany	North Africa	1.62%	54.00%
France	Far East	1.50%	55.50%
Italy	North America	1.24%	56.74%
United Kingdom	Central America and Caribbean	1.23%	57.97%
Sweden	Other Europe	1.14%	59.11%
Netherlands	Far East	1.12%	60.23%

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 60% of the total extra-EU traffic in 1998.

➤ 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) and Sweden (S).

Denmark (DK) supplied data with an incompatible structure for 1998. 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 (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 L307, 02.12.1999, page 46 – Commission Regulation (EC) 2543/99 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, Finland and Denmark

For Greece (1997) Finland (1993 to 1996) and Denmark (1998), estimates were made for departures by taking the corresponding arrival figures reported by other 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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➤ Databases

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