

An update on Business Aviation in Europe

David Marsh
May 2008

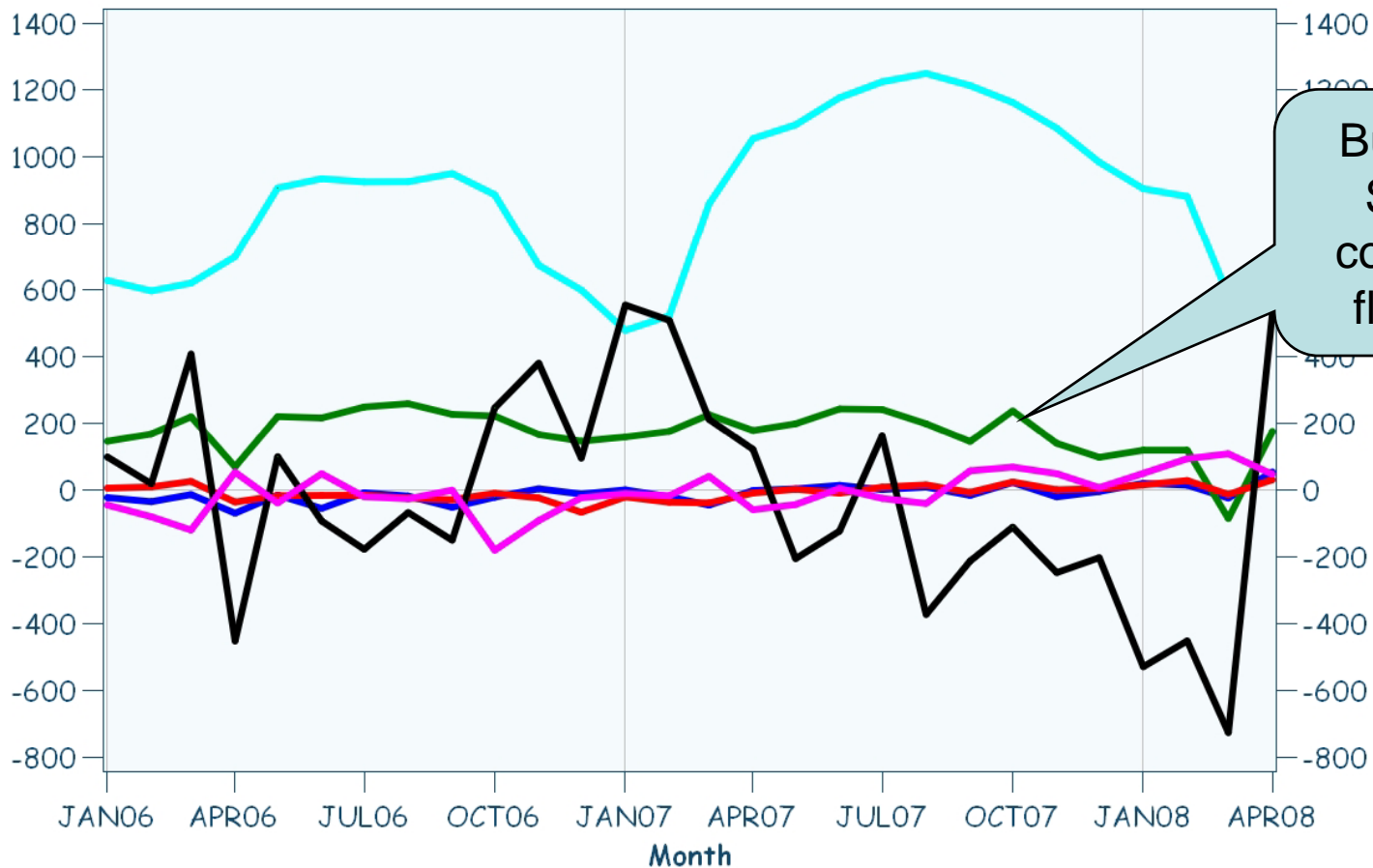
Update now out at EBACE



- Refreshed with data to end 2007
- Some data now available on-line

In 2007, business aviation a major contributor to total growth

Additional Flights/Day since 12 Months before



Business aviation
Second largest
contributor to new
flights in Europe

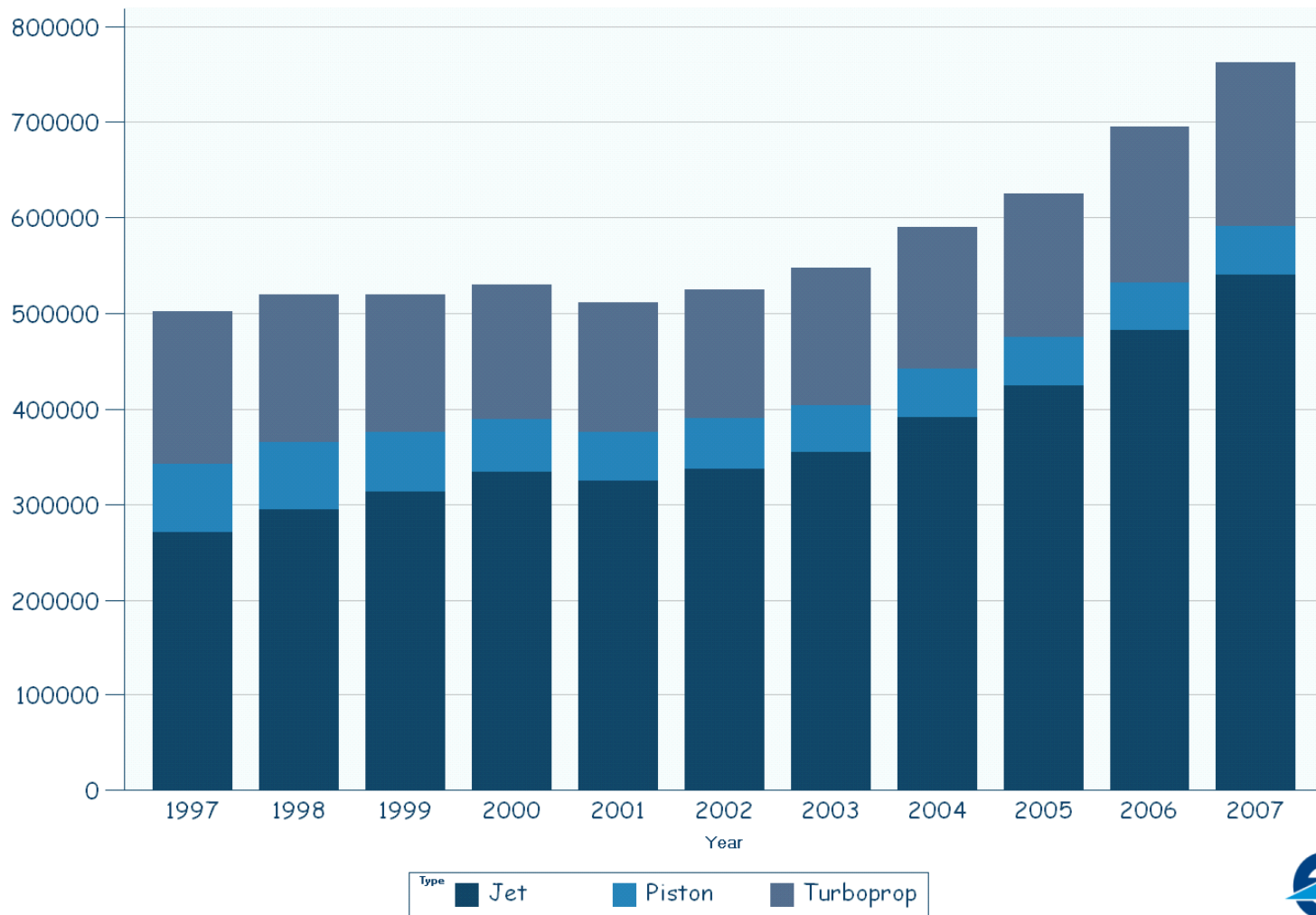


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Growth in jet but also turboprop traffic

Business Aviation IFR Arrivals & Departures

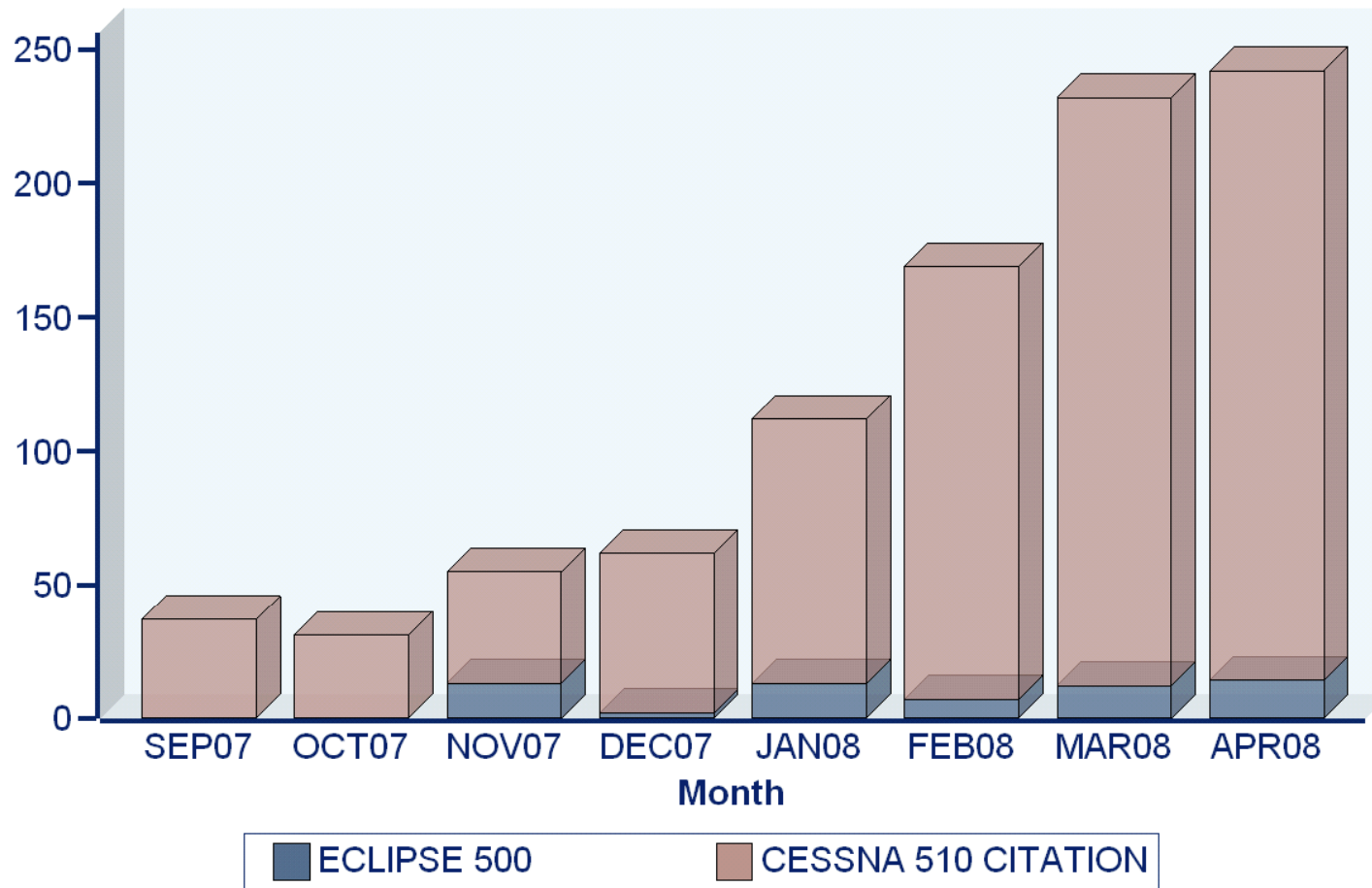


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The VLJs have arrived in Europe

VLJ Flights per month in Europe



Not all growth is Jet

<i>Growth of Daily Arrivals & Departures at Airports in ESRA</i>	<i>Business</i>				<i>Other</i>
	<i>All</i>	<i>Jet</i>	<i>Piston</i>	<i>Turboprop</i>	
1998	3.6%	8.8%	-1.2%	-3.1%	6.5%
1999	-0.1%	6.4%	-10.7%	-7.5%	7.0%
2000	1.7%	6.2%	-11.2%	-2.4%	4.2%
2001	-3.2%	-2.5%	-8.4%	-2.9%	-0.7%
2002	2.5%	4.0%	3.0%	-1.1%	-1.5%
2003	4.4%	5.0%	-5.4%	6.8%	3.2%
2004	7.3%	10.2%	1.9%	1.8%	4.2%
2005	6.3%	8.9%	-2.0%	2.4%	4.4%
2006	11.3%	13.4%	0.5%	8.9%	3.2%
2007	9.8%	12.1%	-0.1%	6.1%	4.1%

Busiest Business Aviation routes in 2007



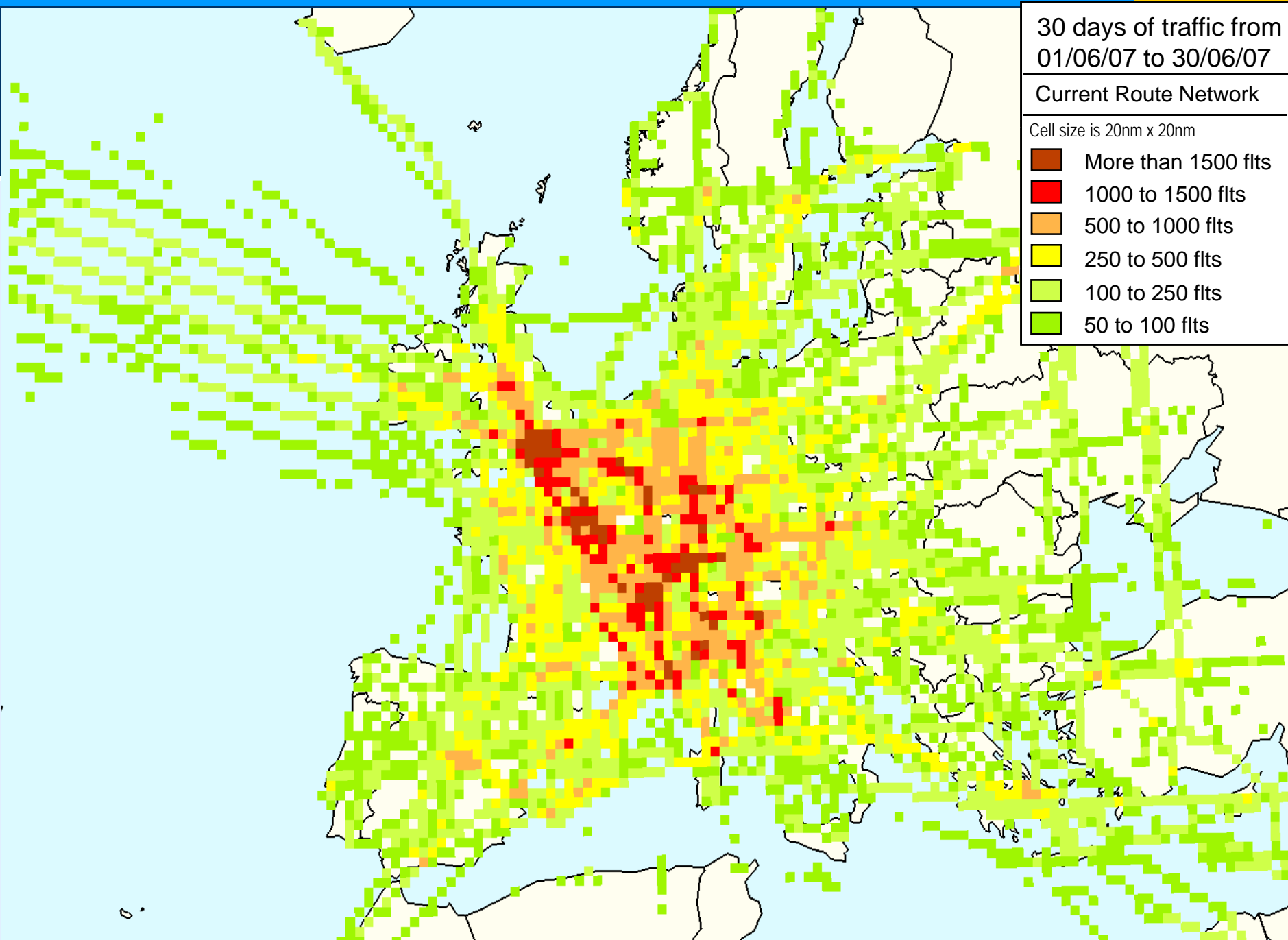
EUROCONTROL SQM

Aircraft: 0044 Clock: 00:00:00 #0 Speed: 15.00

30 days of traffic from
01/06/07 to 30/06/07

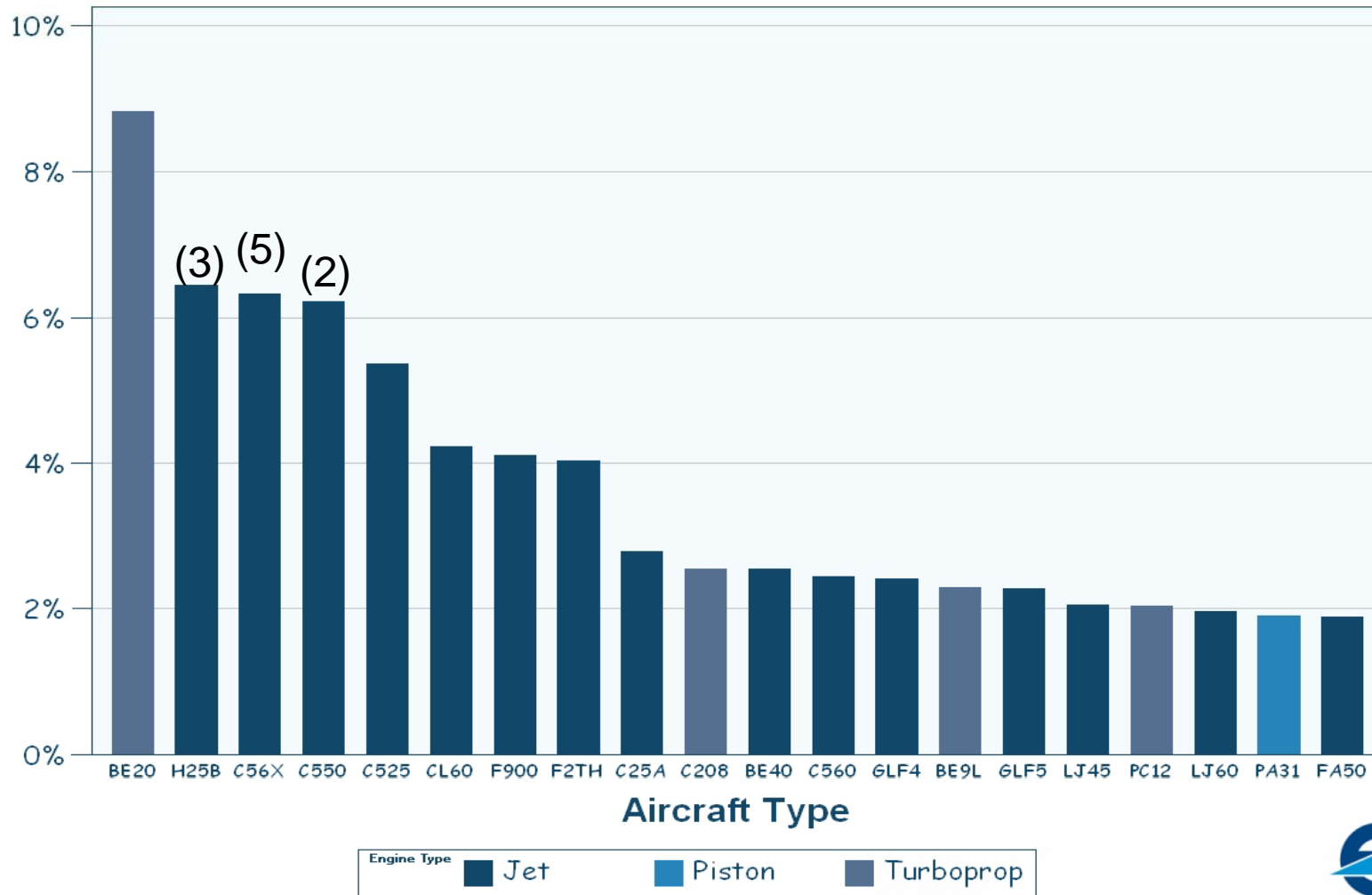
Current Route Network

Cell size is 20nm x 20nm



Some changes in aircraft types

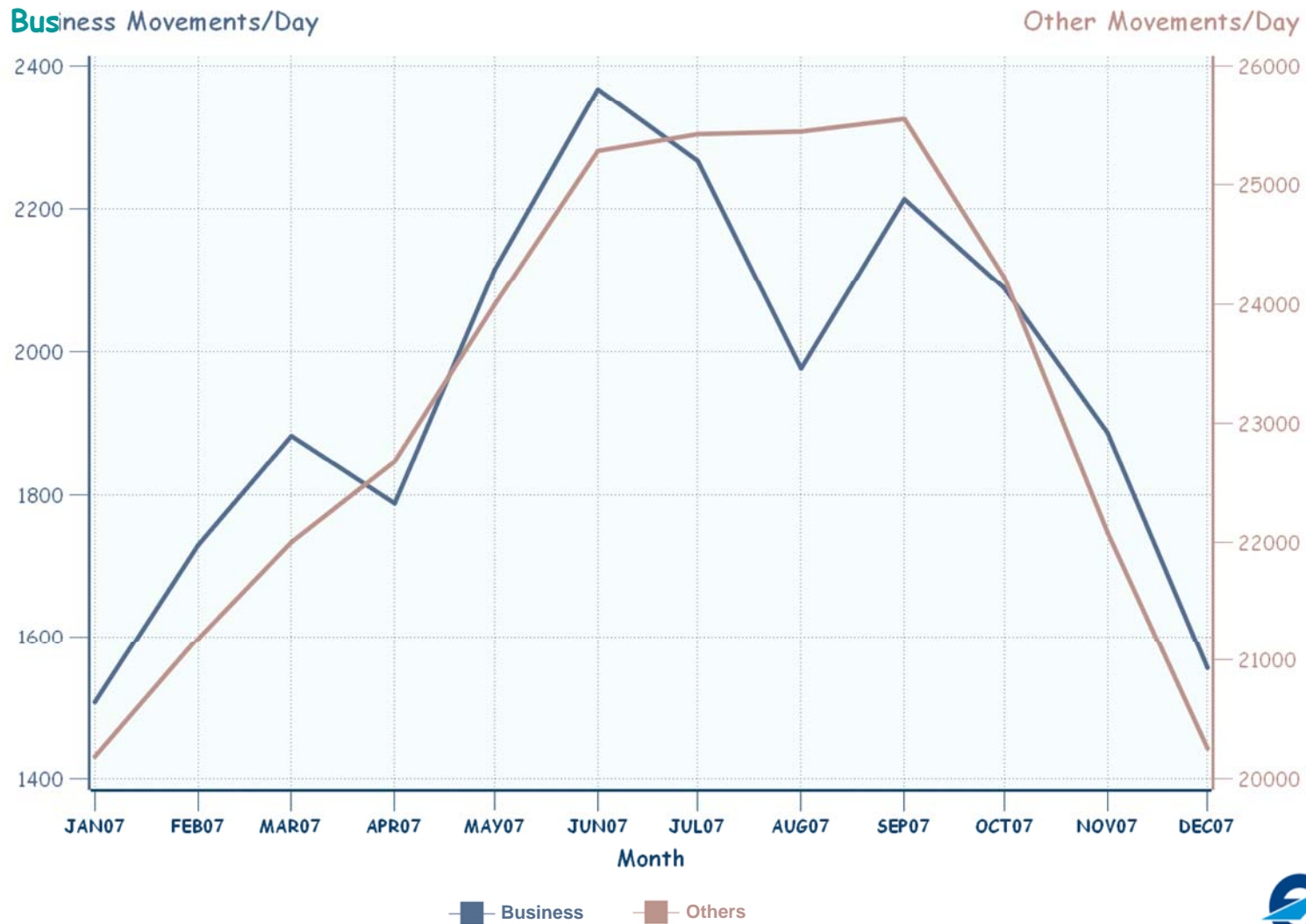
Share of Business Aviation Movements



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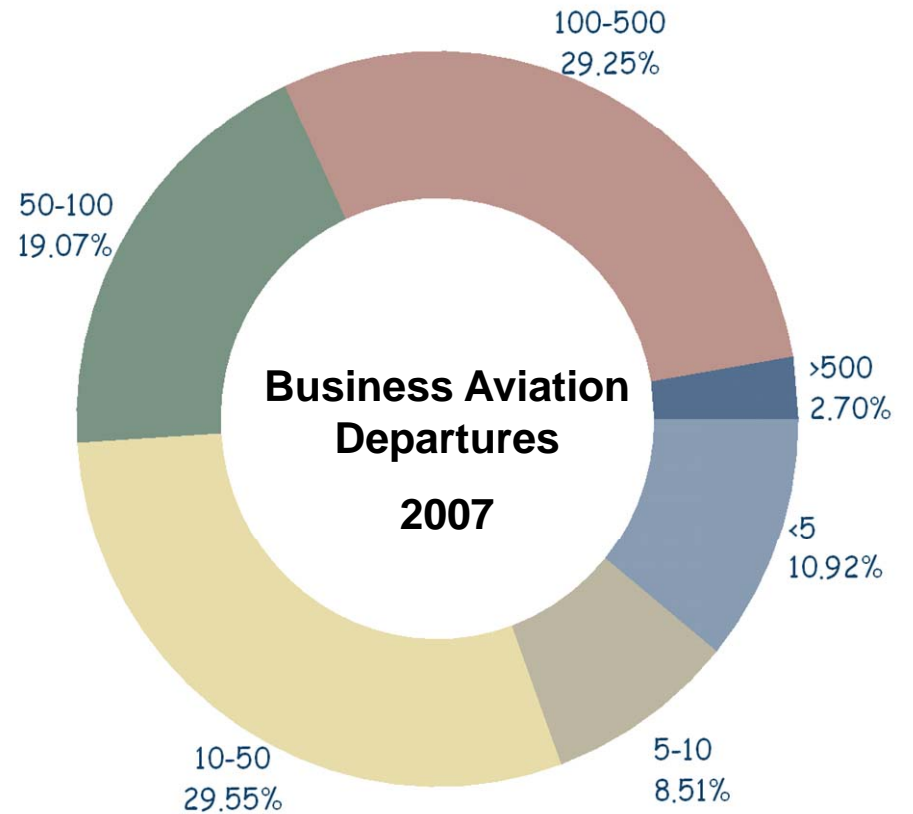
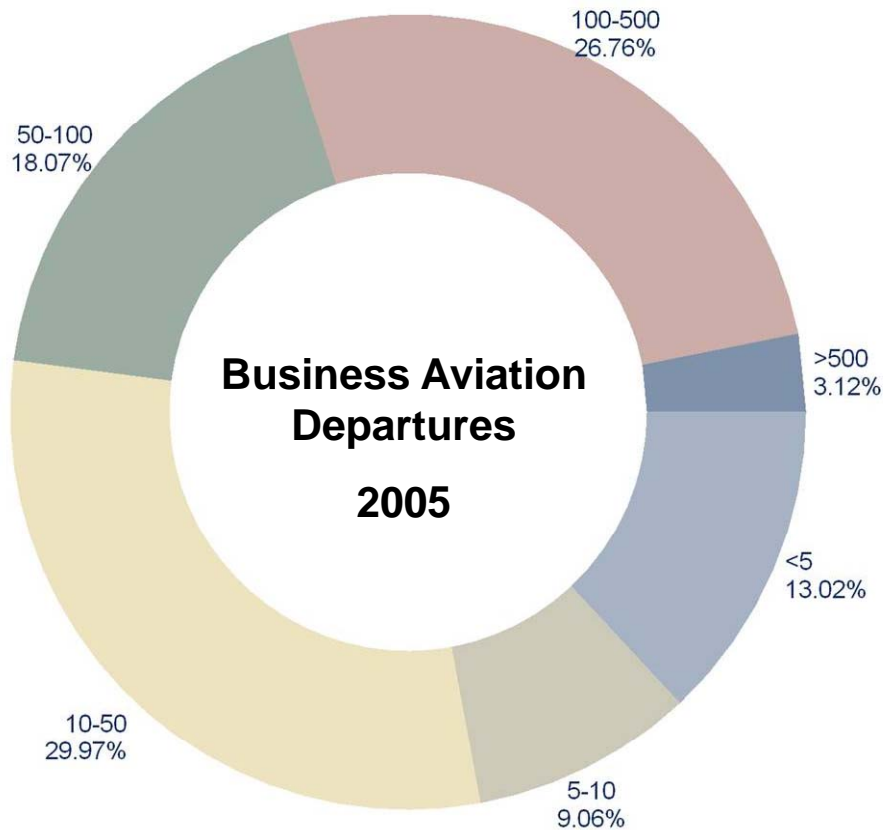
Less of a mid-Summer dip



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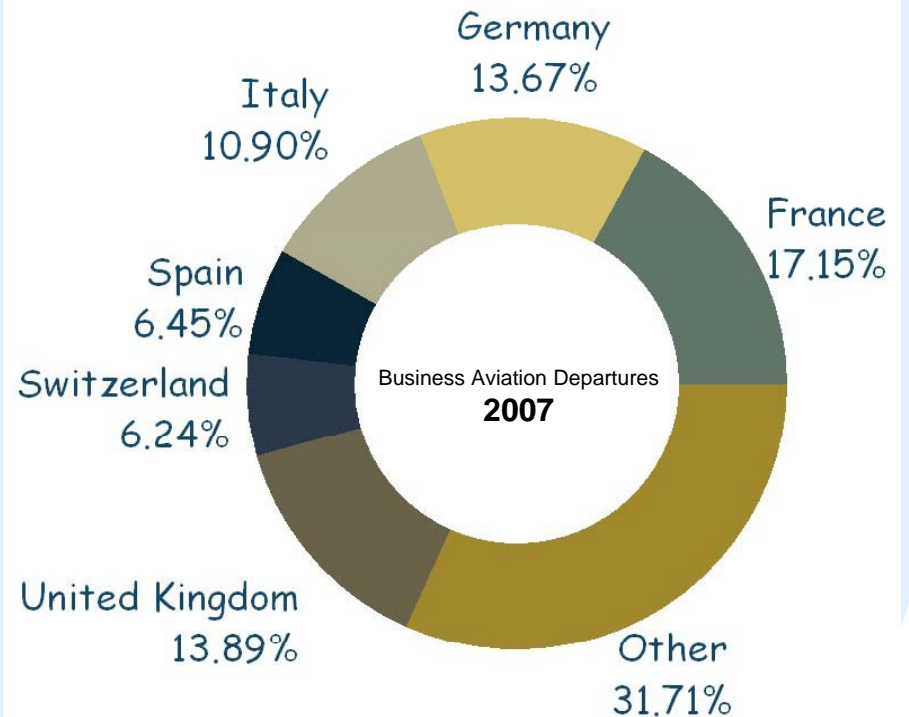
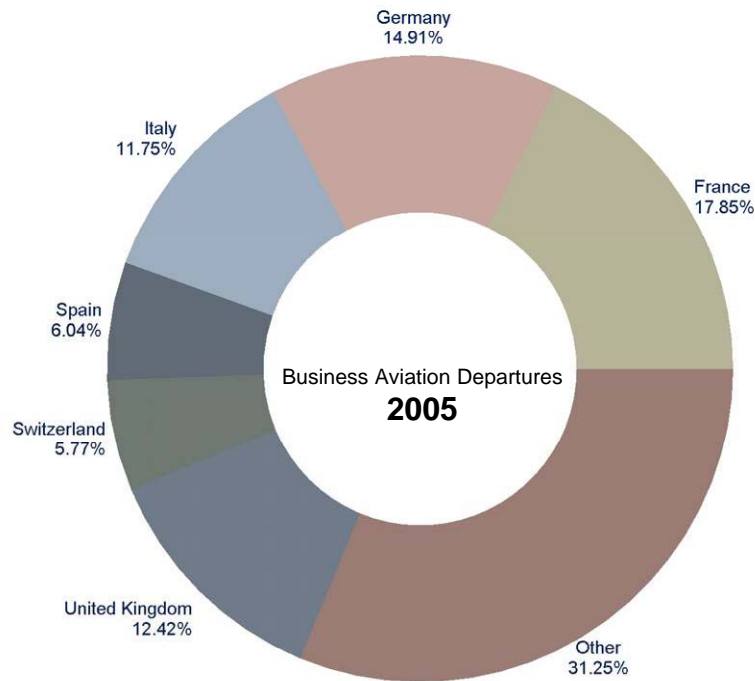


Little growth at tiny airports



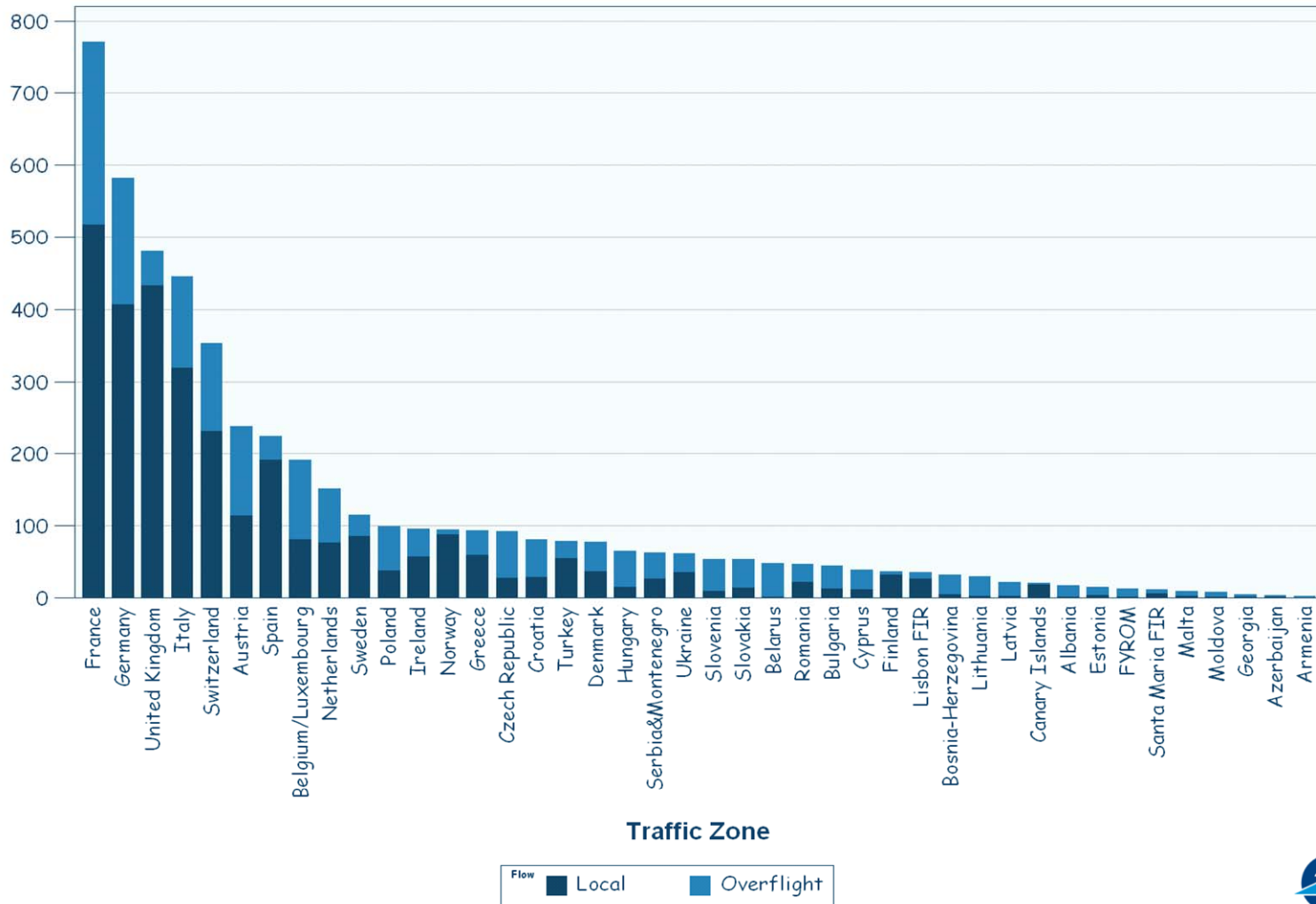
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UK & Switzerland have increased their market share



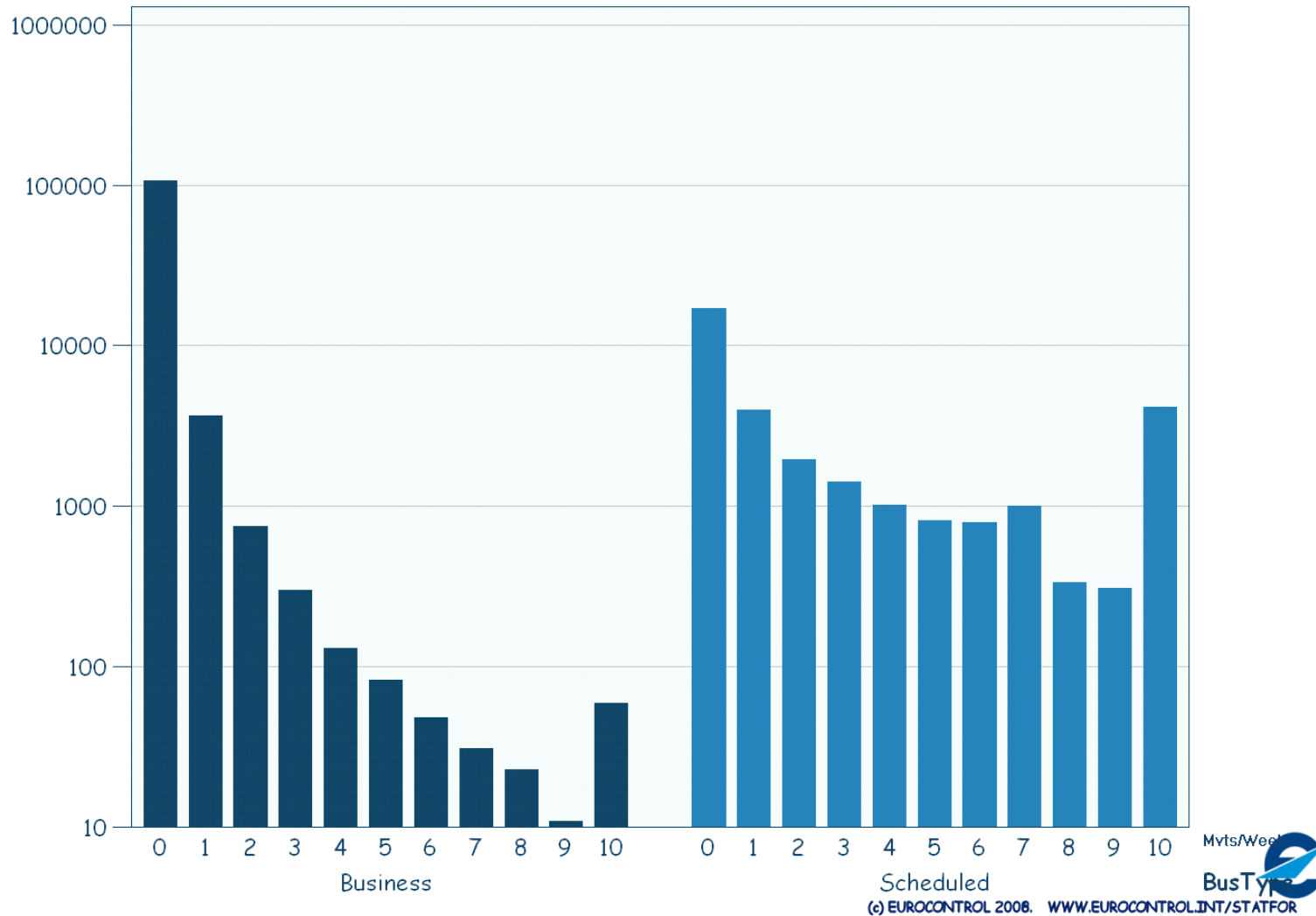
When Overflights are added, ten States have more than 100 Mvts/Day in 2007

Business Movements/Day



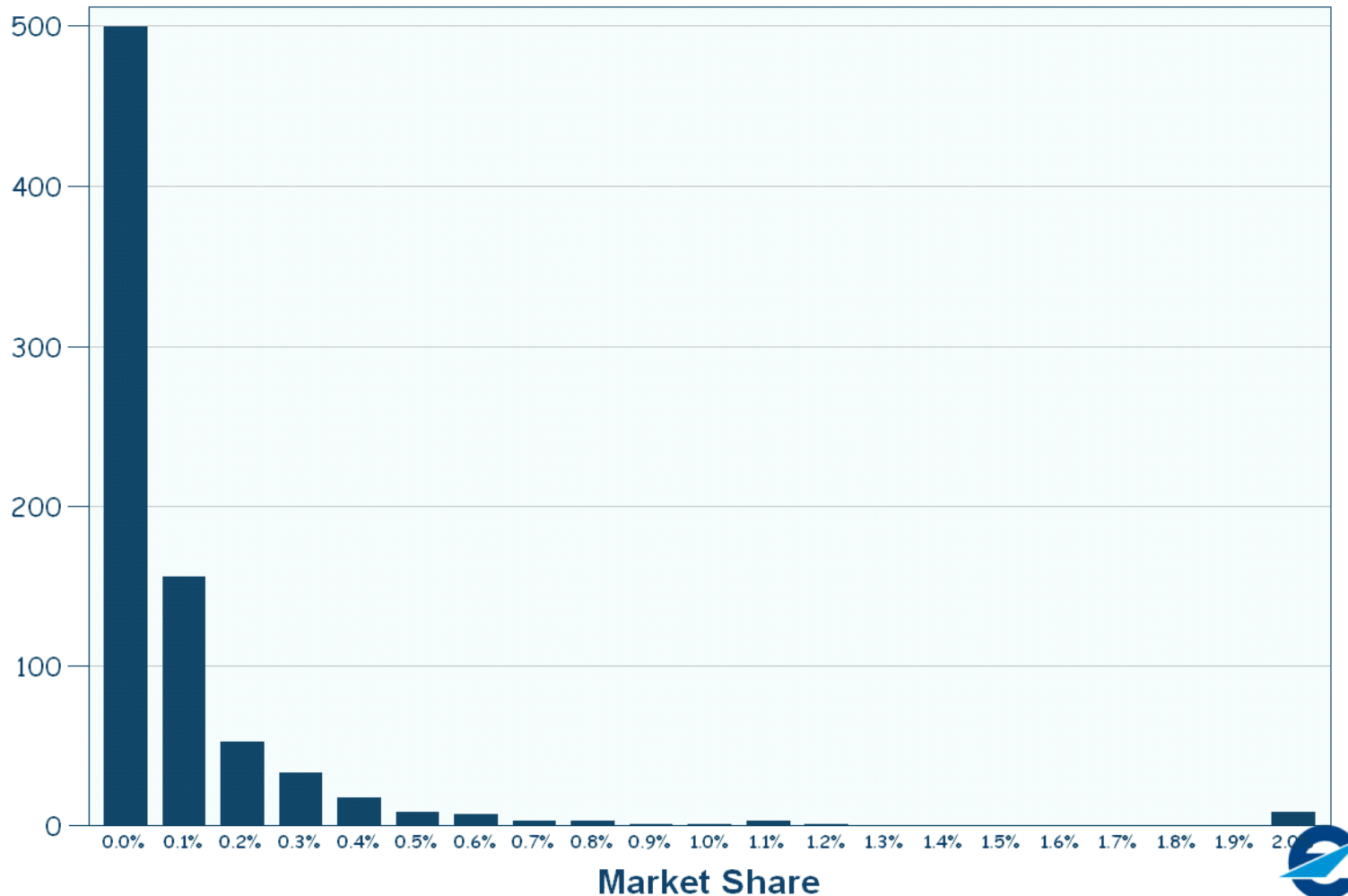
Business Aviation rarely flies the same route twice

Number of Airport Pairs



Few Business Aviation Operators with more than 1% of the market

Number of Operators

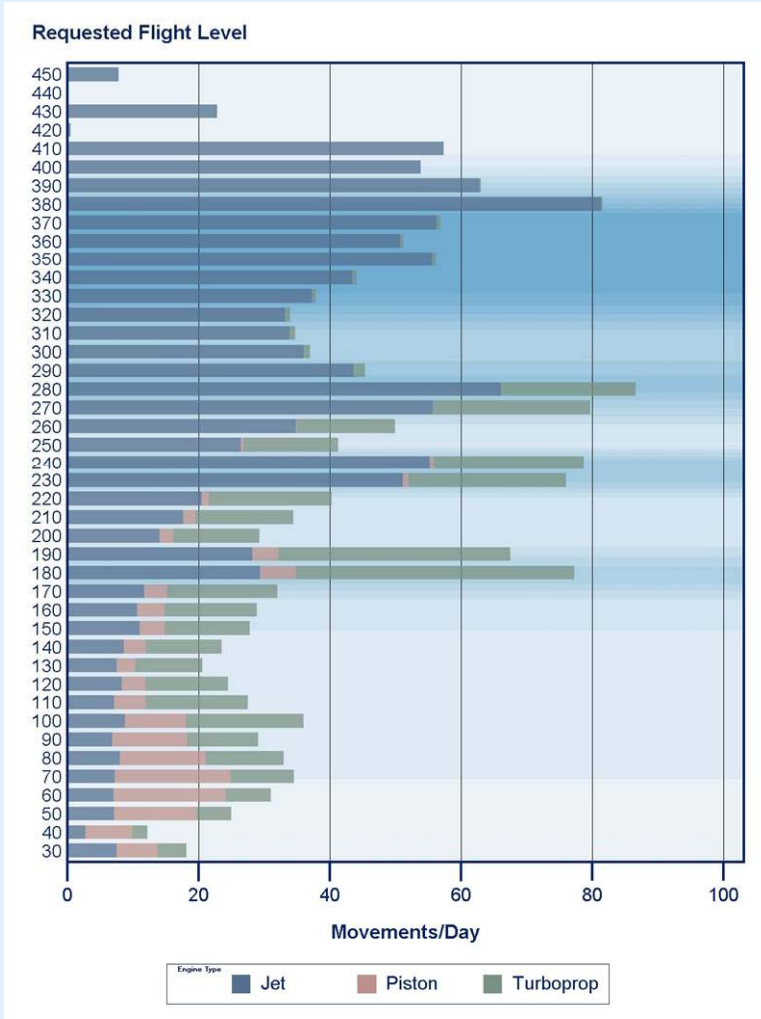


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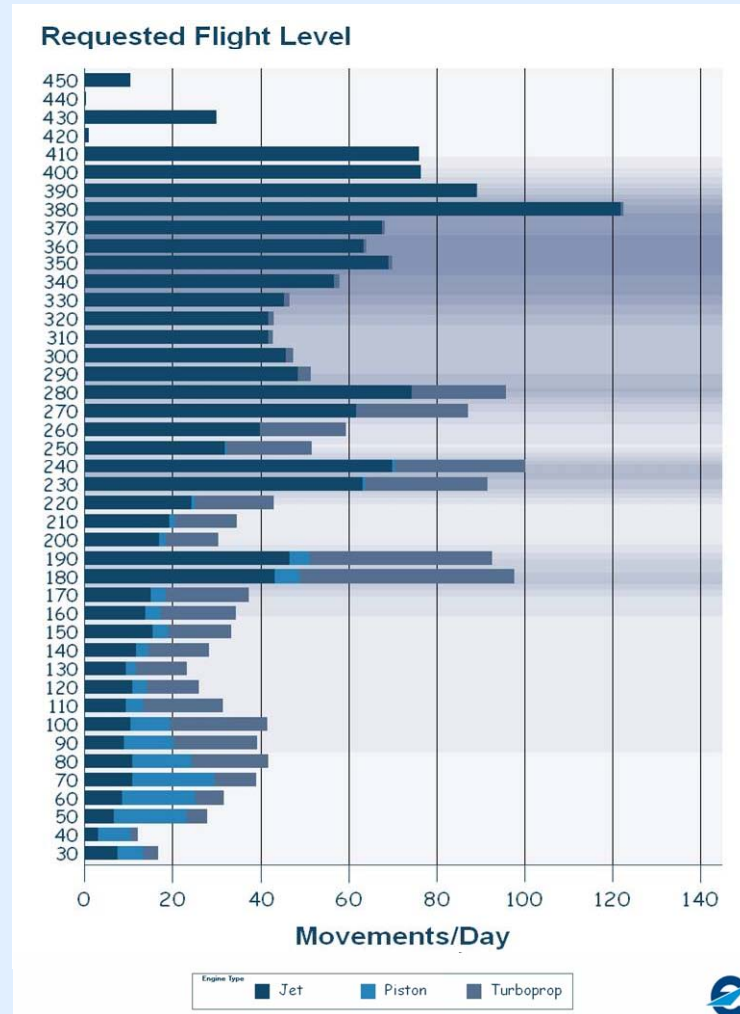


Slight increase in use of highest levels

2005



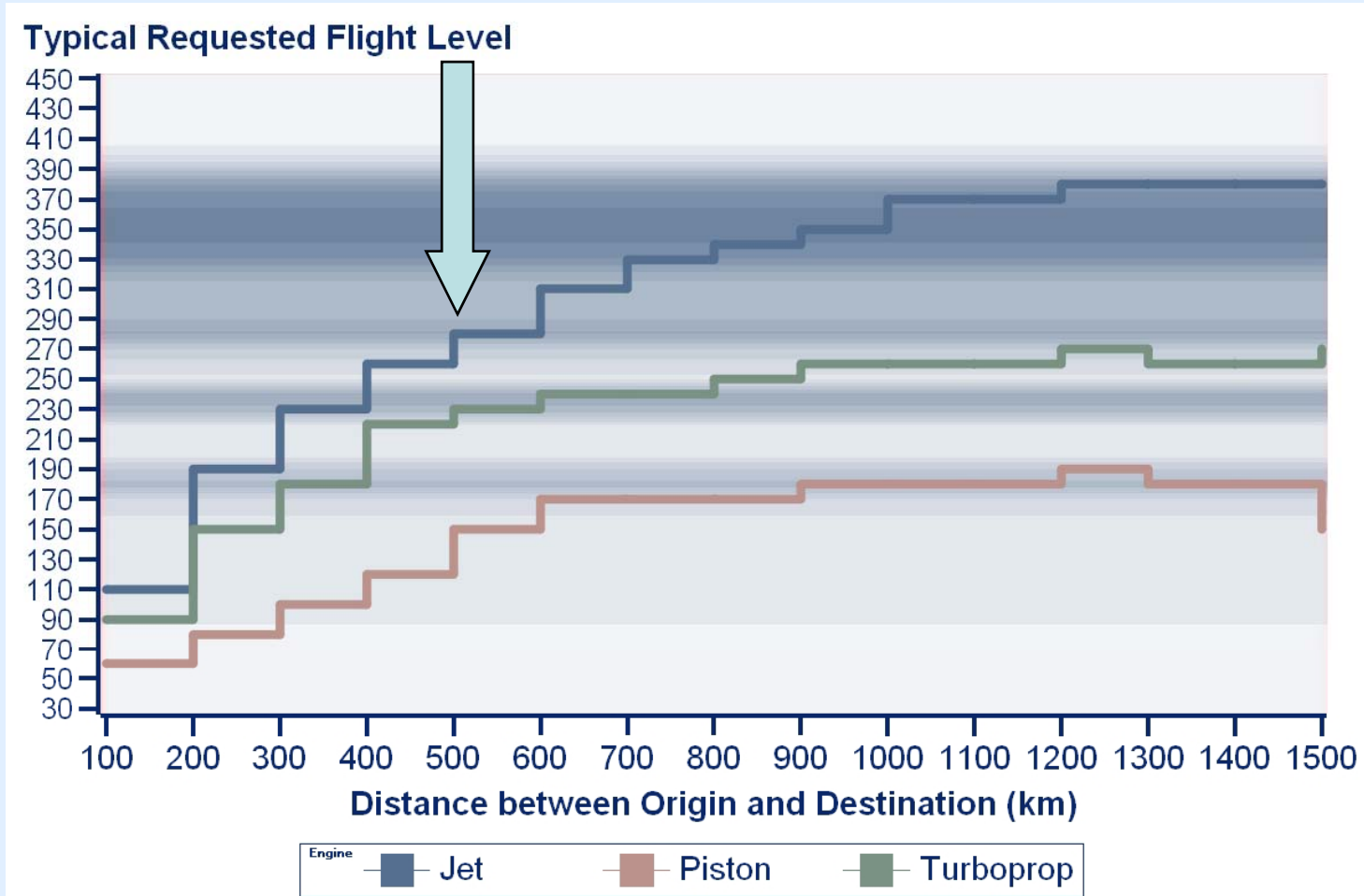
2007



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Only long flights get above the traffic



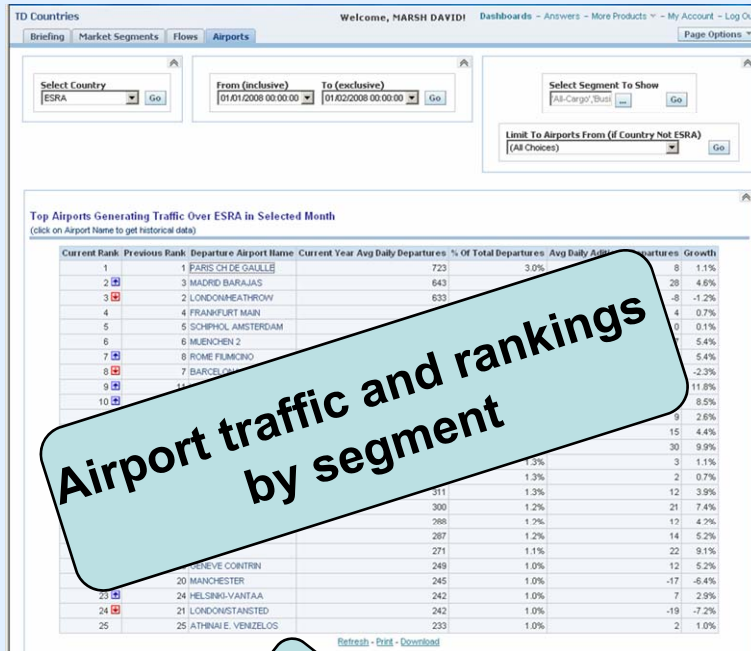
(Flow Management) Delays for business aviation

- 2005: better than average
 - Fewer movements delayed, even though for longer if delayed
- 2007: *no* better than average
 - Still fewer movements delayed (16%, versus 21% for scheduled)
 - But when delayed, delayed for longer (14.5 mins v 10.9 mins)

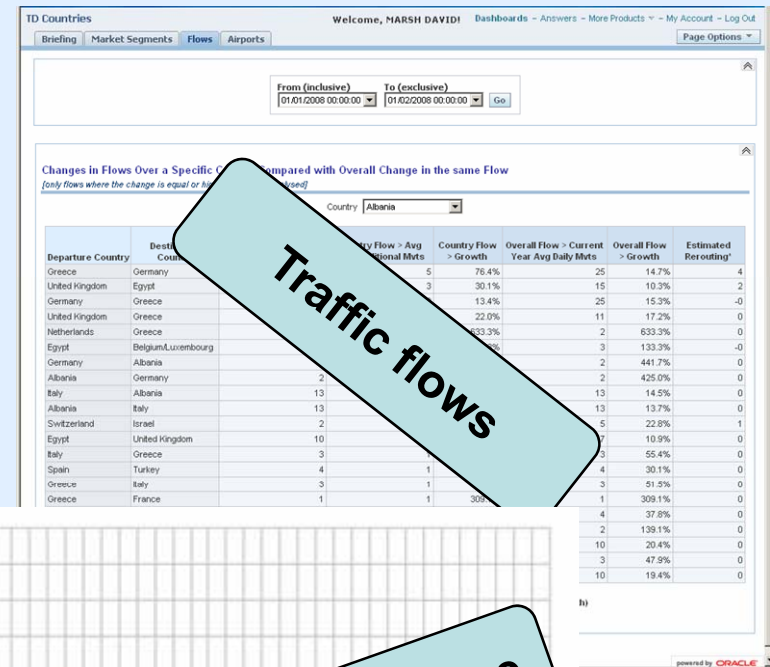
Looking ahead

- Higher forecast
 - Higher baseline: 70% more bizjets on European register in last 2 years
 - Stronger growth
 - Central forecast
 - 3,500 bizjets in Europe by 2017
 - +1,600 flights/day over 10 years
 - High forecast
 - 4,000 bizjets
 - +2,200 flights/day
 - 0.8 percentage points to total flight growth (of around 4%/year)

New statistics portal on European flights



Airport traffic and rankings by segment



Traffic flows



Market segment growth



Low-Cost Market Share

How do I register for the STATFOR statistics portal?

The screenshot shows the EUROCONTROL website with the following sections:

- Header:** EUROCONTROL, the European Organisation for the Safety of Air Navigation. Navigation links: Home | FAQ | Help | Contacts | Quick access.
- Menu:** About us | Business | Stakeholders | Events | Press Room | Search.
- Capacity:** ...every day we fight to reduce delays by increasing the capacity of the air navigation system... [more]
- Press Room:** Press Releases [view all]
 - > EUROCONTROL and Flight Safety Foundation partner to improve aviation safety 11/03/2008News [view all]
 - > Dr Volker Thiem appointed Director of the recently established HR and Administration Directorate 11/03/2008Events & Meetings [Calendar]
 - > General and Business Aviation Forum 2008, Brussels 04/04/2008
- Why EUROCONTROL?:** Europe needs safe air navigation which respects the environment. We at EUROCONTROL are building a European sky irrespective of national boundaries. Our independence and neutrality guarantee efficient solutions for our 38 Member States and beyond. > Read the latest Executive Brief
- EFQM:** Recognised for excellence by EFQM
- EUROCONTROL:** Paving the way to the Single European Sky
- Visit our Info Centre:** [button]
- Flagship Projects:** > SESAR Single European Sky ATM research > All EUROCONTROL projects
- Inside EUROCONTROL:** > Our organisation and offices: all our departments in one click
- Online Services:** LoginID [input] Password [input] [Log in]
 - Forgot your password?
 - You have a Token? Register
- Aircraft Operators' Corner:** > All the information for aircraft operators flying in Europe
- Recent additions:**
 - > Our latest job vacancies
 - > Strategic approach and objectives
 - > EUROCONTROL programmes on TV
 - > EEC Newsletter Autumn 2007
 - > Latest Director General speech

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