An update on Business Aviation in Europe

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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

Business aviation
Second largest contributor to new flights in Europe
Growth in jet but also turboprop traffic
The VLJs have arrived in Europe
<table>
<thead>
<tr>
<th>Year</th>
<th>All</th>
<th>Jet</th>
<th>Piston</th>
<th>Turboprop</th>
<th>Other</th>
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<tbody>
<tr>
<td>1998</td>
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<td>8.8%</td>
<td>-1.2%</td>
<td>-3.1%</td>
<td>6.5%</td>
</tr>
<tr>
<td>1999</td>
<td>-0.1%</td>
<td>6.4%</td>
<td>-10.7%</td>
<td>-7.5%</td>
<td>7.0%</td>
</tr>
<tr>
<td>2000</td>
<td>1.7%</td>
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<td>-11.2%</td>
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<td>4.2%</td>
</tr>
<tr>
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<td>-3.2%</td>
<td>-2.5%</td>
<td>-8.4%</td>
<td>-2.9%</td>
<td>-0.7%</td>
</tr>
<tr>
<td>2002</td>
<td>2.5%</td>
<td>4.0%</td>
<td>3.0%</td>
<td>-1.1%</td>
<td>-1.5%</td>
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<tr>
<td>2003</td>
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<td>5.0%</td>
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<tr>
<td>2004</td>
<td>7.3%</td>
<td>10.2%</td>
<td>1.9%</td>
<td>1.8%</td>
<td>4.2%</td>
</tr>
<tr>
<td>2005</td>
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<td>8.9%</td>
<td>-2.0%</td>
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<td>4.4%</td>
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<tr>
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<tr>
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<td>-0.1%</td>
<td>6.1%</td>
<td>4.1%</td>
</tr>
</tbody>
</table>
Busiest Business Aviation routes in 2007
30 days of traffic from 01/06/07 to 30/06/07

Current Route Network

Cell size is 20nm x 20nm

- More than 1500 flts
- 1000 to 1500 flts
- 500 to 1000 flts
- 250 to 500 flts
- 100 to 250 flts
- 50 to 100 flts
Some changes in aircraft types

Share of Business Aviation Movements

Aircraft Type

BE20 H258 C56x C550 C525 CL60 F900 F2TH C25A C208 BE40 C560 6LF4 BE9L 6LF5 LT45 PC12 LT60 PA31 FA50

Engine Type

Jet Piston Turboprop

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Less of a mid-Summer dip
Little growth at tiny airports

Business Aviation Departures 2005

Business Aviation Departures 2007
UK & Switzerland have increased their market share
When Overflights are added, ten States have more than 100 Mvts/Day in 2007.
Business Aviation rarely flies the same route twice
Few Business Aviation Operators with more than 1% of the market
Slight increase in use of highest levels

2005

2007

Requested Flight Level

Movements/Day

Requested Flight Level

Movements/Day

Jet  Piston  Turboprop
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?

1. Go to [www.eurocontrol.int](http://www.eurocontrol.int)
2. Register with ‘OneSky Online’
3. Email us with your new ID.
4. We’ll get you connected…

statfor.info@eurocontrol.int