Airport Slots in Europe

IATA Worldwide Airport Slots

www.iata.org/slots
Consumers are benefiting from connectivity despite slot constraints

58,000 routes globally

30,000 with a slot on at least one end

Source: IATA Economics based on SRS Analyzer
Number of Coordinated Airports in Europe

104 Coordinated airports 2018
204 total globally

*2018 Data

51% of the global Coordinated airports

Source: IATA slot coordinated airports list
Growth of routes and passengers 2010 -2017

- 2,000 additional routes added at EU L3 airports (+29%) 2010-2017
- Airlines operating at EU L3 airports added 155m pax (+43%)

Source: IATA Economics based on SRS Analyzer
Slot Coordinated airports in Europe

Share of routes, flights and passengers departures in 2017

- 72% of flights departed from L3 airports
- 59% of routes operated from EU airports departed from L3 airports
- 73% of passengers in EU departed from L3 airports

Source: IATA Economics based on SRS Analyzer
The EU Slot Regulation has delivered

- Access to congested airports bringing competition
- Efficient use of scarce airport capacity
- Connectivity and growth of routes
Growth of European low cost airlines

Top airports for low cost aviation:
- Barcelona
- London Gatwick
- Dusseldorf

All congested slot coordinated airports (L3)

Under EU Slot Regulation
- Airlines gained access
- Provided more choice to the consumers
- Built competitive services

Source: The EUROCONTROL Statistics and Forecast Service (STATFOR)
The WSG does not just benefit ‘legacy airlines’.

Low cost airlines are increasingly flying out of slot coordinated airports.

According to Eurocontrol low-cost flights grew by 61% (from 5,200 flights per day to 8,400 flights) between 2007 and 2016.

Major low-cost carriers (including EasyJet, Ryanair, Vueling, Norwegian, Wizz Air) use a significant number of slots at congested airports (e.g. BCN, LGW, DUS, ORY, AMS).

LCCs account for 40% of intra-european seat capacity

Airlines have grown and flourished, despite a severe lack of airport capacity and compete directly with established carriers at congested airports.
Competition in Europe

Competition is intensifying between legacy and LCC carriers

Intra-European city pairs

1997 - 2017

Steady rise in LCCs and FSCs competing on intra-Europe city pairs:
Share seat capacity
1997 – 12%
2017 – 55%

Source: ICF for ACI Europe, Identifying the Drivers of Air Fares, May 2018
Competition in Europe

Competition is intensifying

Percent of routes operated by number of airlines summer season

- **2010**: 25% of routes operated by two or more airlines
- **2018**: 30% of routes operated by two or more airlines

Source: IATA Economics based on SRS Analyzer
## Competition in Europe between low cost carriers

### European LCC head-to-head routes – flights by carrier

<table>
<thead>
<tr>
<th>Airline</th>
<th>Flights</th>
<th>Routes</th>
<th>Flights</th>
<th>Airline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ryanair</td>
<td>5,018</td>
<td>65</td>
<td>5,606</td>
<td>EasyJet</td>
</tr>
<tr>
<td>Ryanair</td>
<td>4,652</td>
<td>61</td>
<td>5,714</td>
<td>Vueling</td>
</tr>
<tr>
<td>Ryanair</td>
<td>1,458</td>
<td>30</td>
<td>1,334</td>
<td>Norwegian</td>
</tr>
<tr>
<td>EasyJet</td>
<td>3,660</td>
<td>33</td>
<td>2,662</td>
<td>Vueling</td>
</tr>
<tr>
<td>EasyJet</td>
<td>2,839</td>
<td>28</td>
<td>1,027</td>
<td>Norwegian</td>
</tr>
<tr>
<td>Ryanair</td>
<td>1,436</td>
<td>32</td>
<td>1,636</td>
<td>Wizz</td>
</tr>
<tr>
<td>Vueling</td>
<td>1,266</td>
<td>19</td>
<td>1,116</td>
<td>Norwegian</td>
</tr>
<tr>
<td>Vueling</td>
<td>76</td>
<td>3</td>
<td>156</td>
<td>Wizz</td>
</tr>
<tr>
<td>EasyJet</td>
<td>206</td>
<td>4</td>
<td>96</td>
<td>Wizz</td>
</tr>
<tr>
<td>Norwegian</td>
<td>9</td>
<td>1</td>
<td>12</td>
<td>Wizz</td>
</tr>
</tbody>
</table>

Source: FlightGlobal schedules April 2018

* easyJet, Vueling, Ryanair, Norwegian, Wizz
Growth of long-haul routes ex-Europe

No. of long-haul routes departing from slot coordinated airports


808 826 819 812 839 850 894 964 1025

27% growth 2010-2018

Source: IATA Economics based on SRS Analyzer
Efficient use of scarce capacity in Europe

Growth in flights and passengers on Intra-EU routes

<table>
<thead>
<tr>
<th></th>
<th>Percent change (2010-2017)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled flights</td>
<td>4%</td>
</tr>
<tr>
<td>Pax per flight</td>
<td>38%</td>
</tr>
<tr>
<td>Passengers</td>
<td>43%</td>
</tr>
</tbody>
</table>

Source: IATA Economics based on DDS, SRS Analyzer
Efficient use of scarce capacity in Europe

Flights and passengers on Intra-EU routes

Increased connectivity
4 % more intra-EU flights in 2017

<table>
<thead>
<tr>
<th>Year</th>
<th>Passengers per flight</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>76 pax / flight</td>
</tr>
<tr>
<td>2017</td>
<td>104 pax / flight</td>
</tr>
</tbody>
</table>

2017
38% more pax /flight

With 4% growth in flights in 2017 but 38% more passengers per flight on intra-EU operations, airlines demonstrated they are consistently meeting market demand and efficiently using the capacity available to deliver consumer benefits through intra European connectivity through increased load factor.
Efficient use of scarce capacity in Europe

Growth in flights and passengers on International routes

Percent change (2010-2017)

- Scheduled flights: 23%
- Pax per flight: 21%
- Passengers: 49%

Source: IATA Economics based on DDS, SRS Analyzer
Efficient use of scarce capacity in Europe

Flights and passengers on International routes

Increased connectivity
23% more flights in 2017

2010
124 passengers/flight

2017
151 passengers/flight

2017
21% more passengers/flight

Strong growth on international routes with 23% more flights in 2017 than 2010, and 21% more passengers per flight. Connectivity and growth on international routes bringing efficient and effective use of capacity available to deliver consumer and economic benefits of building strong networks with the rest of the world.
Efficient use of ever scarce capacity in Europe

The 80/20 rule does not lead to wasted capacity

Capacity usage continues to be well above 80% at L3 airports, however, this is use of declared capacity. Regular capacity analysis should be undertaken and made transparent for all stakeholders to ensure the actual available capacity is effectively allocated. The Coordinator can only allocate what is declared.

Source: SDG

2017 Use of available capacity
LHR 99%
AMS 99%
LGW 98%
Delivering connectivity in Europe

Europe and Rest of the World city pairs

Source: ICF for ACI Europe, Identifying the Drivers of Air Fares, May 2018

2010 – 2017
Despite congestion city pairs between Europe-RoW nearly double
Connectivity in European hubs is strong

European hubs remain the best connected in the world
Hub connectivity – top 20 global airports 2018

7 of top 20 airports in EU
FRA No.1 in terms of hub connectivity globally

Source: ACI EUROPE Airport Industry Connectivity Report 2018