



# Airport Slots in Europe

## IATA Worldwide Airport Slots

[www.iata.org/slots](http://www.iata.org/slots)

# Consumers are benefiting from connectivity despite slot constraints



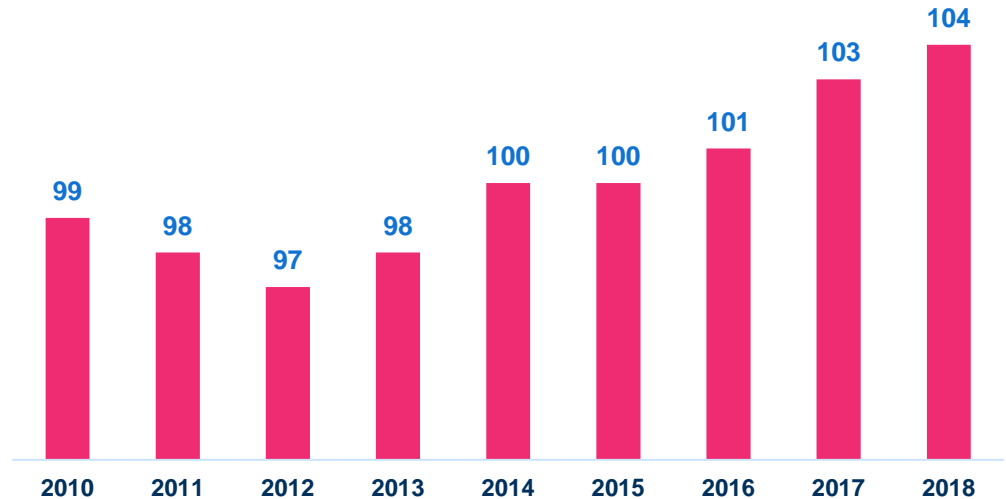
# Number of Coordinated Airports in Europe

**104 Coordinated  
airports 2018**  
**204 total globally**

*\*S18 Data*

**51% of the global  
Coordinated  
airports**

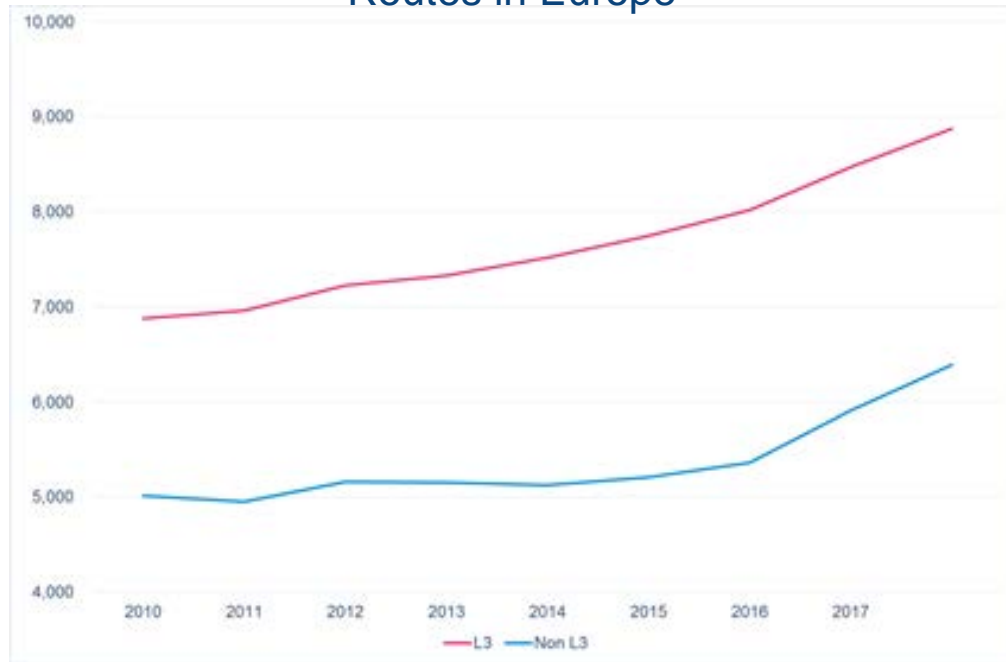
**No. of Coordinated airports in Europe**



# Slot Coordinated airports in Europe

## Growth of routes and passengers 2010 -2017

Routes in Europe



**2,000 additional routes added at EU L3 airports (+29%) 2010-2017**

**Airlines operating at EU L3 airports added 155m pax (+43%)**

# Slot Coordinated airports in Europe

Share of routes, flights and passengers departures in 2017



2017

59% of routes operated from EU airports departed from L3 airports

72% of flights departed from L3 airports

73% of passengers in EU departed from L3 airports

# 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

# Growth of European low cost airlines

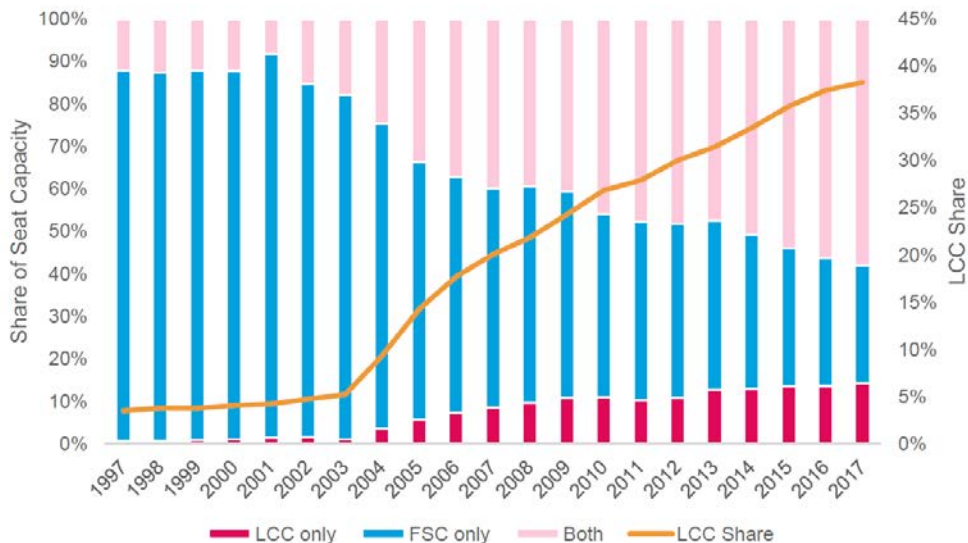
- The WSG does not just benefit 'legacy airlines'.
- Low cost airlines are increasingly flying out of slot coordinated airports.
- According to Eurocontrol low-cost flights grew by 61% (from 5,200 flights per day to 8,400 flights) between 2007 and 2016.
- Major low-cost carriers (including EasyJet, Ryanair, 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: OAG, airline-route must be operated at least 2x weekly to be counted

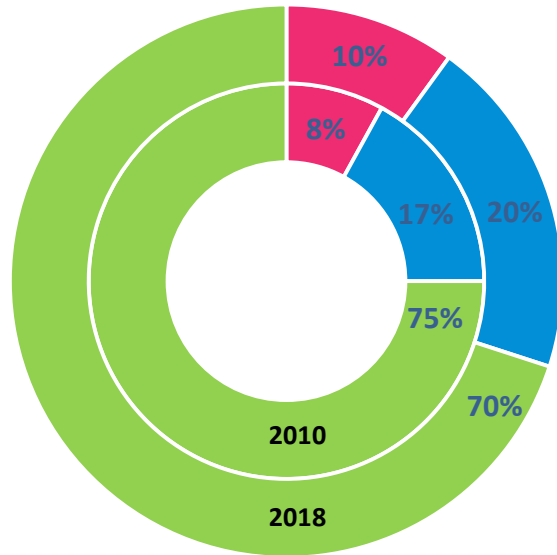
Notes: LCC = 'Low Cost Carrier', FSC = 'Full Service Carrier', Both = at least one LCC operating at one FSC carrier operate the city pair

# Competition in Europe

Competition is intensifying

Percent of routes operated by number of airlines  
summer season

■ >2 ■ 2 ■ 1



**2010**  
25% of routes  
operated by two  
or more airlines

**2018**  
30% of routes  
operated by two  
or more airlines

# Competition in Europe

between low cost carriers

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

Airline	Flights	Routes	Flights	Airline
Ryanair	5,018	85	5,606	EasyJet
Ryanair	4,652	61	5,714	Vueling
Ryanair	1,458	30	1,334	Norwegian
EasyJet	3,660	33	2,662	Vueling
EasyJet	2,839	28	1,027	Norwegian
Ryanair	1,436	32	1,636	Wizz
Vueling	1,266	19	1,116	Norwegian
Vueling	76	3	156	Wizz
EasyJet	206	4	96	Wizz
Norwegian	9	1	12	Wizz

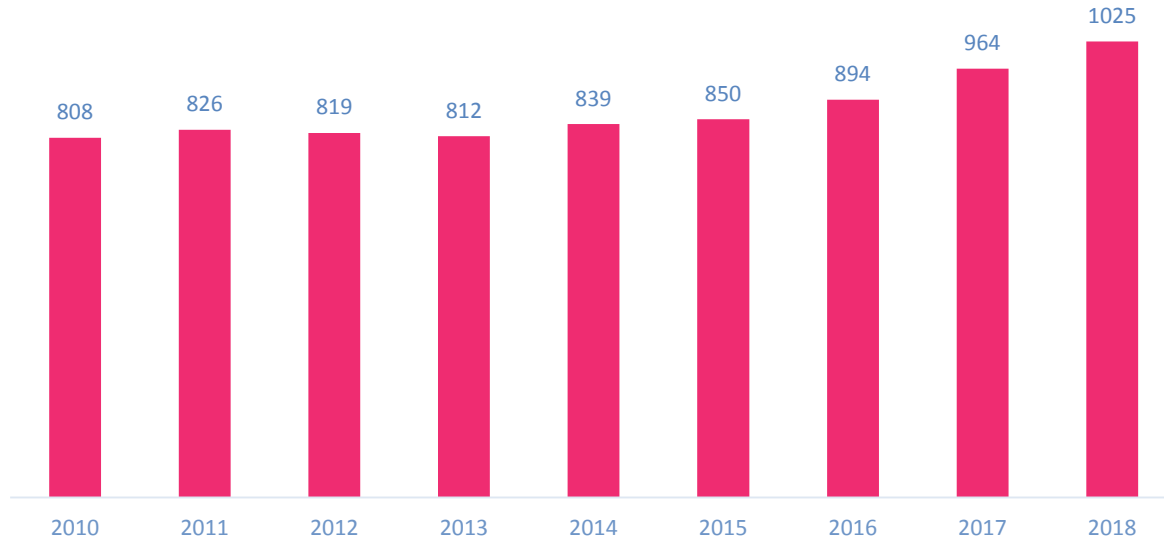
Source: FlightGlobal schedules April 2018

23% of flights operated by 5 LCC's\* in Europe directly compete with another LCC

\* easyJet, Vueling, Ryanair, Norwegian, Wizz

# Growth of long-haul routes ex-Europe

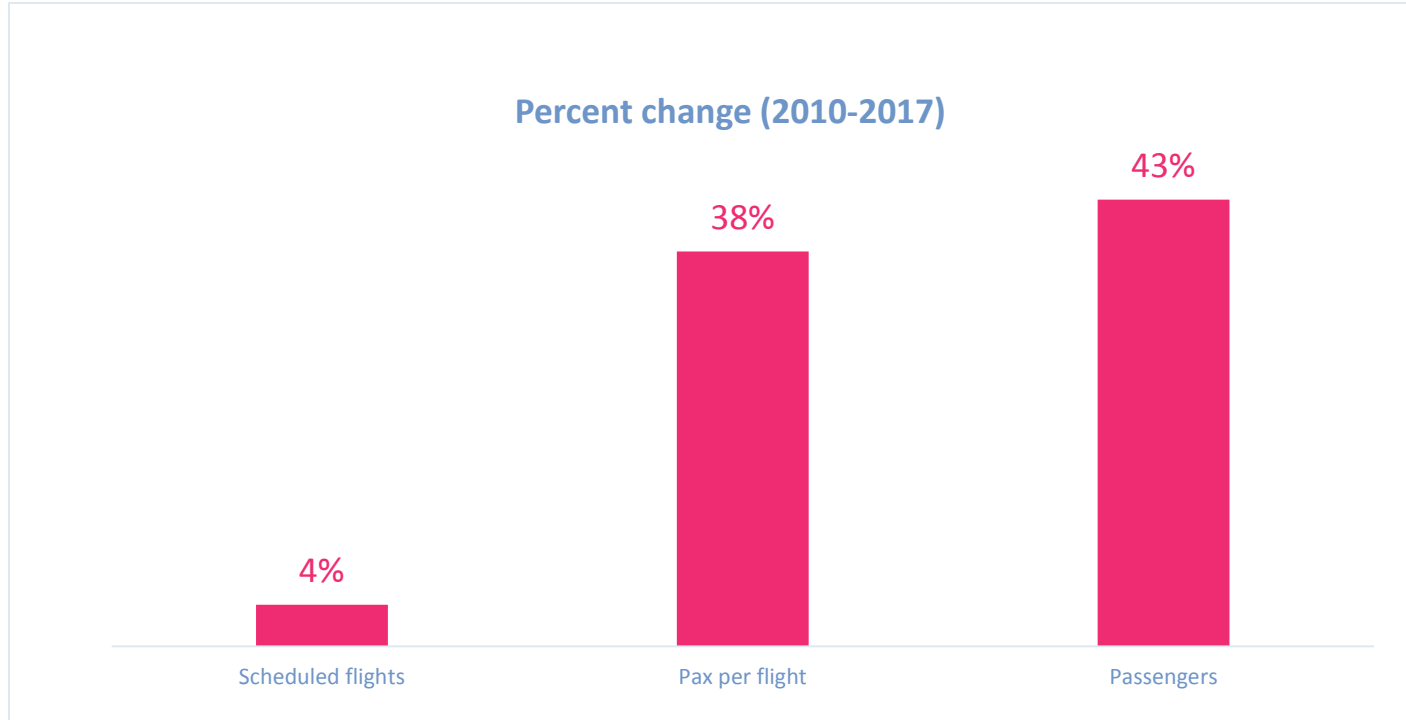
No. of long-haul routes departing from slot coordinated airports



**27% growth  
2010-2018**

# Efficient use of scarce capacity in Europe

Growth in flights and passengers on **Intra-EU routes**



# Efficient use of scarce capacity in Europe

## Flights and passengers on Intra-EU routes

Increased connectivity  
4 % more intra-EU  
flights in 2017

2010  
76 pax / flight

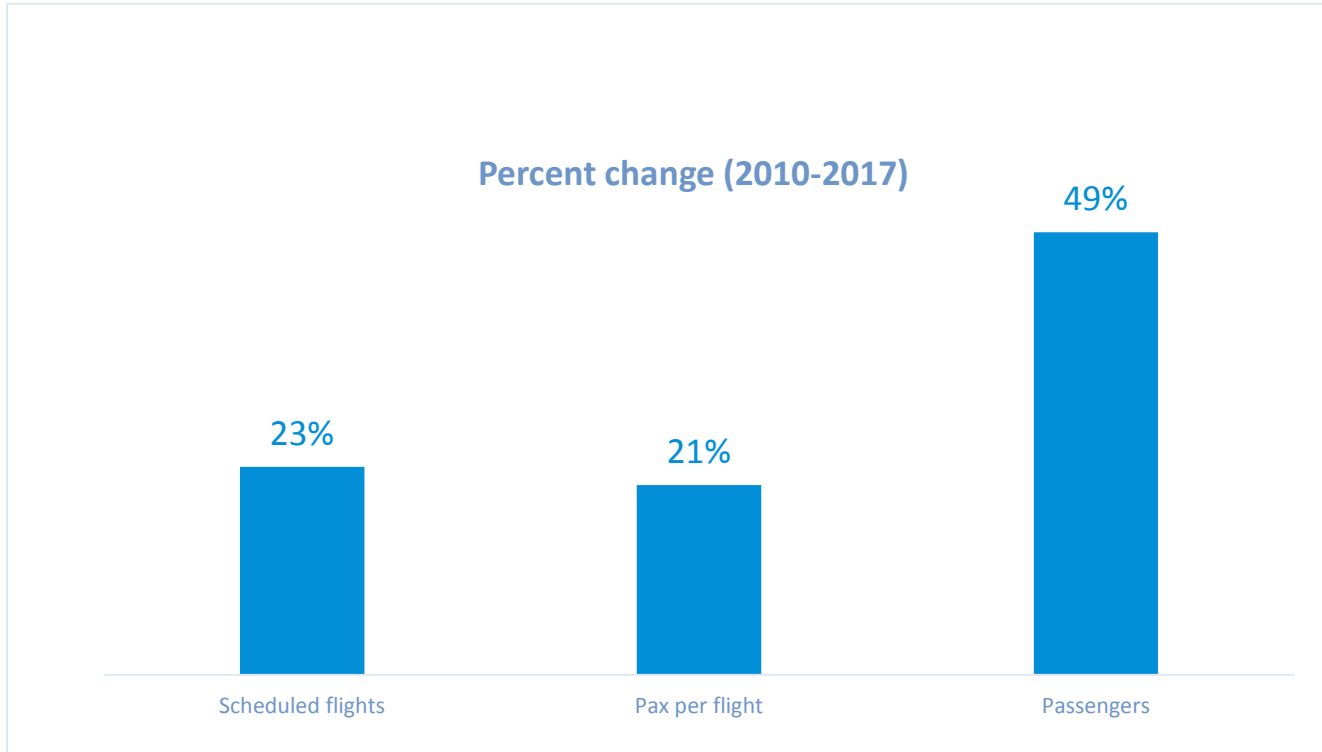
2017  
104 pax / flight

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**



# 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

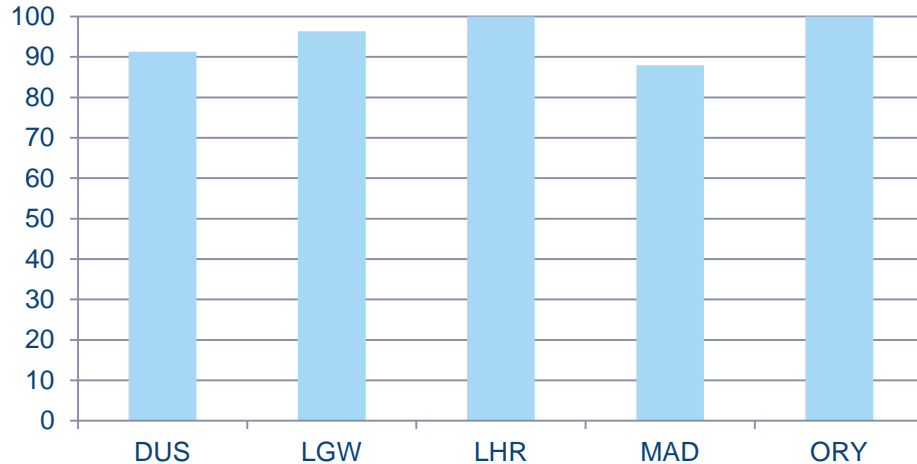
Strong growth on international routes with 23% more flights in 2017 than 2010, and 21% more passengers per flight. **Connectivity and growth on international routes bringing efficient and effective use of capacity** available to deliver consumer and economic benefits of building strong networks with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



# Efficient use of ever scarce capacity in Europe

The 80/20 rule does not lead to wasted capacity

## % Capacity available used - 2010



Source: SDG

## 2017 Use of available capacity

LHR 99%

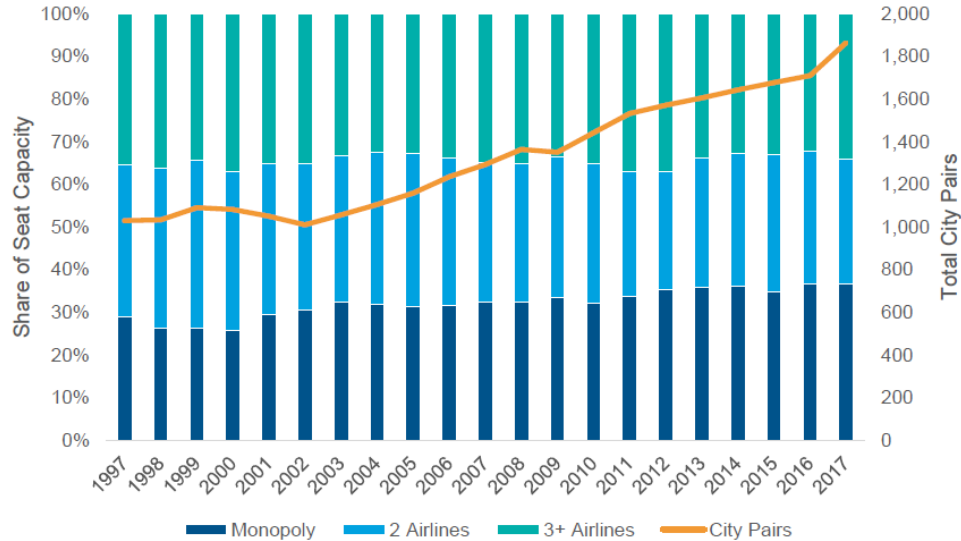
AMS 99%

LGW 98%

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.**

# Delivering connectivity in Europe

## Europe and Rest of the World city pairs



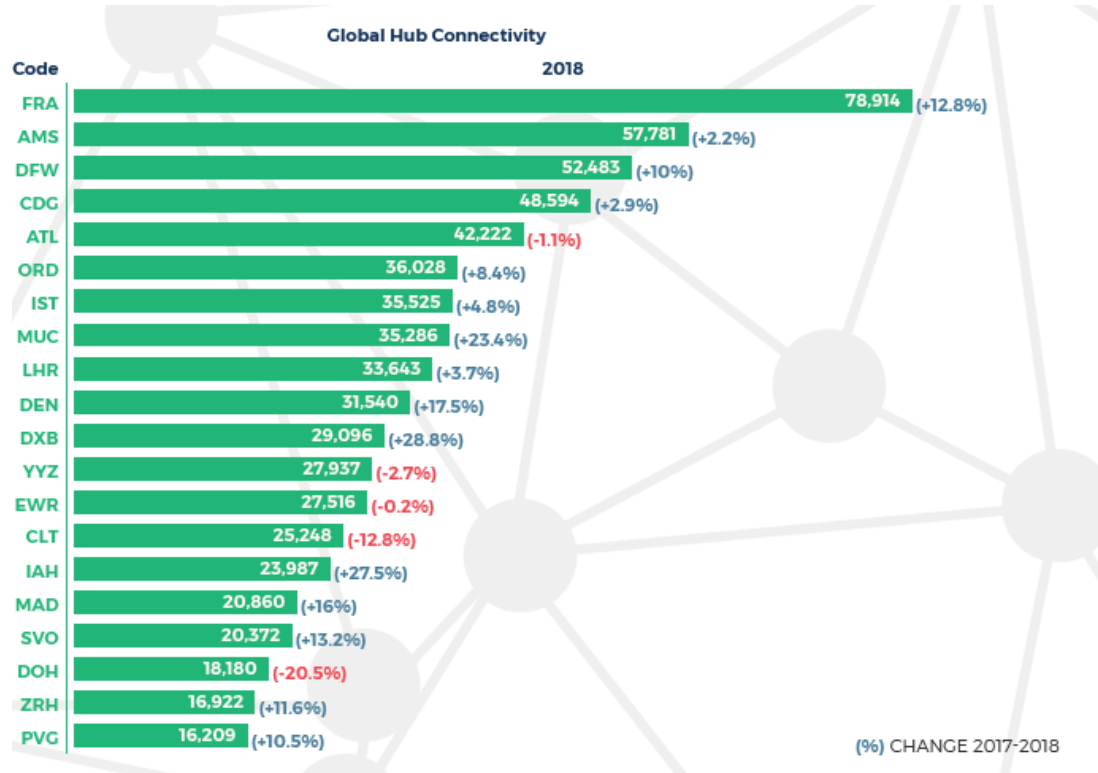
**2010 – 2017**  
Despite congestion city pairs between Europe-RoW nearly double

Source: OAG, airline-route must be operated at least 2x weekly to be counted  
Notes: airlines within groups (e.g. IAG, Air France/KLM) are not considered to be 'competitors'. For example, if a route is operated by both Air France and KLM, then this would be counted as '2 airlines' pre-merger, and a monopoly route post-merger

# 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