

Summary:

2003 Norwegian Air Travel Survey

The survey

This report gives results from the 2003 Norwegian Air Travel Survey (ATS). Since 1972, Avinor (former Civil Aviation Administration) has frequently conducted travel surveys at Norwegian airports. The surveys gather information on the passengers and the journeys they make, such as start/end points, purpose, transport use to the airport, duration of the journey, background variables (age, gender, occupation), and other. The data are used for a number of different purposes, including forecasts, airport management, route planning, and general market analyses.

The 2003 ATS covers domestic and international scheduled flights, and international charter operations. Data were collected at 33 Norwegian airports in the period January to December 2003. The survey covers all domestic and international routes, and practically all airlines operating at Norwegian airports are included in the survey.

Questionnaires were handed out to passengers at sampled flights. The respondents were asked to fill in the questionnaire and return it to the administrator before boarding the plane. The final data file includes information from 62,906 passengers on domestic flights, 43,575 passengers on international scheduled flights, and 3,533 passengers on international charter flights. This makes the 2003 ATS the largest and most representative air travel survey conducted in Norway. The data are calibrated to correspond to total traffic in the 12-month period from January 2003 to December 2003.

General overview

In 2003 air travel constituted six percent of total person kilometres in Norway. However, with respect to long distance travel, aviation, together with personal use car, is the most important mode of transport. Forty two percent of all domestic travel 300 km or longer are done by air, a corresponding percentage by car, eight percent by train, five percent by coach, and two percent by ferry or other boat. Still, there has been a decrease in domestic air traffic during recent years. In the peak year 1999, the total number of domestic journeys surpassed 10 million, compared with 8,7 million journeys in 2003.

On the other hand, international travel has increased at a steady rate. Total number of international journeys in 2003 was 6,8 million, up from 5,9 million in 1998. Adding charter operations, international air travel from Norway reaches a total number of 8,5 million journeys (for more statistics, see www.avinor.no).

Market size and travel frequency

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In 2003 approximately 1.7 million Norwegians made one or more domestic flights. This is an increase by 40 percent since the previous ATS in 1998. On the other hand, travel frequency remains constant. Corresponding to six years ago, Norwegians on average make two domestic flights (i.e., one return journey) annually. The stagnation is due to a strong decrease in the number of business trips, and more low frequent travellers coming into the market owing to price reductions.

Travel frequency varies a lot between regions. With respect to domestic air travel, those resident in Northern Norway are the most frequent fliers (5.8 single trips), those in South-east Norway travel the least (0.5 single trips).

The number of Norwegians making international flights also has increased significantly. In 2003, some 1.1 million people made at least one journey abroad by air, up from 0.7 million in 1998. On average, Norwegians made one single international flight (i.e., 0.5 return journeys) in 2003. The most frequent international travellers are those resident in Oslo and Akershus (two single flights per year).

Market structure

Norwegian air travel has for long been characterised by a high share of business travel. However, during recent years there has been a significant change in the market. Leisure travel now constitutes almost half (48 percent) of domestic travel, and 56 percent of international scheduled air travel. The corresponding figures in 1998 were 61 and 60 percent respectively. These changes are caused by a strong increase in the number of leisure trips, and a decrease in the number of business trips.

Forty percent of the passengers are women. This apply to both domestic and international travel. Twenty years ago only one out of four passengers were women. Men are still in great majority on business trips (75 percent), while women are in majority on private journeys (57 percent).

Copenhagen is the most important destination for international air travel from Norway, accounting for 27 percent of total traffic. Kastrup is the hub for SAS' international flights and 63 percent of the passengers on this route are in transit to other destinations. London (Heathrow, Gatwick and Stanstead) is the second most important destination, representing 14 percent of the total number of passengers. Other important destinations are Stockholm, Amsterdam, Paris and Frankfurt.