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Summary:

Air Travelling on Scheduled Routes 1992-1998

The survey

The Air Travel Survey (ATS) 1998 is intended to supplement the Civil Aviation Administration's on-going passenger statistics. The survey collects information on start/end points of the journey, trip purpose, duration of the journey, background variables such as age, gender, occupation, and other information. These data are useful not only for the Civil Aviation Administration but also for the air companies, and all those concerned with the development of Norwegian air traffic. In principle, the survey covers all domestic and international flights from Norway. Data was collected in six different weeks during the period 1. September 1997 and 31. August 1998. A total of 40.648 completed forms covering domestic flights, and 30.240 from international flights were registered. The 1998 ATS is the largest and most representative aviation travel survey carried out in Norway. Virtually all companies, domestic and international, are represented in the survey. The response rate was calculated to 55 percent. The data was expanded such that it corresponded to the total traffic in the 12-month period September 1997 to August 1998.

General overview

In 1998 some 9.5 million single journeys were undertaken on domestic scheduled flights, and 5.9 million on international flights to and from Norway. This suggests a very strong growth in traffic during the period since the previous survey in 1992. Growth in international traffic has been especially high, increasing by almost 70 percent, while the corresponding increase in domestic traffic was 47 percent. The combined growth in GNP in the period was 26 percent, and 25 percent for private consumption, indicating that the growth in air traffic has been about twice that of national economic growth.

Norwegian civil aviation have changed drastically since 1992. From being a market subject to strong controls and regulation in the early 1990s, the air market is now fully liberalised within the area covered by the EU agreement. Among other things, this has resulted in increased competition, and there is today a broader participation in air traffic. Today, the plane is the most important means of transport for long distance travel in Norway, and for international traffic to/from Norway. More than every third long-distance domestic journey (over 300 km) is now by plane. Concerning international travel the role of the aircraft is even stronger when compared with other means of transport. Since 1980, international flights to/from Norway have trebled.

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Travel extent and frequency

In 1998 the Norwegian population undertook on average two domestic flights (i.e. one return journey) annually. Travel frequency has increased dramatically during the last ten years, the average in 1987 was only 1.2 journeys. There are, however, large variations between regions and counties regarding domestic travel frequency. Those resident in North Norway travel most frequently; those in South-east Norway the least.

By customer basis in this report, we mean all persons who have undertaken at least one journey during the course of a year. In 1998, this corresponded to 1.17 million persons. Each of these undertook, on average, four return journeys. Some 40 percent travelled just once during the course of the year, while 50.000 individuals (4%) undertook more than 30 journeys. This group of “frequent fliers” accounted for every fourth domestic journey.

On average the Norwegian population undertook 0.8 single international journeys by plane during 1998. This represents an 80 percent increase compared to 1992. The customer basis on international flights was 1.4 million, fairly evenly divided between Norwegians and those resident abroad. The corresponding figure for 1980 was 0.8 million, again indicating a strong growth. 60 percent of international journeys are now undertaken by Norwegians, and 40 percent by those resident abroad.

36 percent of domestic and international flights are undertaken by women. This proportion has risen constantly since the beginning of the 1980s when women accounted for 25 percent. The male dominance is largest for business travel, but women are in the majority for private journeys. A half of all journeys are undertaken by those aged 30 to 50.

Travel purpose and other characteristics of the journey

Air travel may in fact be regarded as a combined market consisting of business trips (including journeys to and from work) and private trips. On domestic flights business travel has fallen from 64 to 60 percent in the last 10-15 years, while private travel has increased correspondingly. We find the same pattern for international travel, although changes here have been relatively small during the last 5-6 years.

A half of all domestic travel is paid for by the employer. Of this, 70 percent state that they are engaged in the private sector; 30 percent in the public sector. Four percent pay themselves in so far as they are self-employed, and a further 5 percent have their fares paid by the client. As such, some 60 percent of all domestic journeys are paid for in association with work/business. We also find this general pattern repeated for international journeys.

Who pays for the ticket largely determines the type of ticket used. On domestic flights, three of four work-related journeys are normal price tickets, occasionally with a small discount. The remainder incorporate a reduced fare. Only about 20 percent of private journeys are undertaken at normal fares. The trend over time is that the private employers account for a smaller proportion of air tickets than previously, while the passengers themselves pay a larger proportion. Increasingly fewer international travellers use business class. In 1986, two of three used this class, while only 32 percent fell in this category some 12 years later.

Two-thirds of domestic passengers have a frequent flyer membership for one or more carriers, and a third of these consider that the membership has influenced their choice of carrier. Use of such frequent flyer cards on international flights is less, and fewer consider that choice of carrier is influenced by the bonus program.

Similar to six years ago, Copenhagen is the most important destination for international traffic, accounting for 26% of international travel. Kastrup is the hub for SAS' international flights and almost two-thirds of passengers are in transit to other destinations. London is the second most important destination, being a hub for BA. Other important destinations are Stockholm, Amsterdam, Paris and Frankfurt. If we consider developments in recent years, both Copenhagen and London have declined relatively while Amsterdam and Frankfurt have increased in importance. This is associated with Braathens alliance with KLM, and SAS' agreement with Lufthansa.

Business travel - some further comments

Even though the proportion of business journeys has declined slightly in the 1990s, these journeys remain the mainstay for air traffic. The market is dominated by private industry, which accounts for more than two-thirds of all domestic business travel, while public employees account for 25 percent and other groups (students, pensioners, etc.) account for 5 percent. Public sector employees undertook about 50 percent more journeys in 1998 than in 1992, while the increase in the private sector was 35 percent in the same period. In other words the public sector has become of increased significance for air transport.

It's interesting to note that there are broad differences between journeys undertaken by those engaged in the private and public sectors. While more than a half of all journeys undertaken by public sector employees is concerned with courses and conferences, journeys taken by private sector employees are fairly evenly divided between courses/conferences, sales/purchases, and various forms of support services. Common to both groups is that leaders, particularly top management, are strongly over-represented among air passengers.

1.3 million domestic journeys are associated with the oil and gas activities, corresponding to almost one fourth of all business journeys by plane. 37 percent of these relate to travel to and from the work place. Those airports which have a particularly high proportion of journeys related to the oil/gas sector are Stord, Skien, Kristiansund, Stavanger, Sandefjord, Florø and Haugesund.