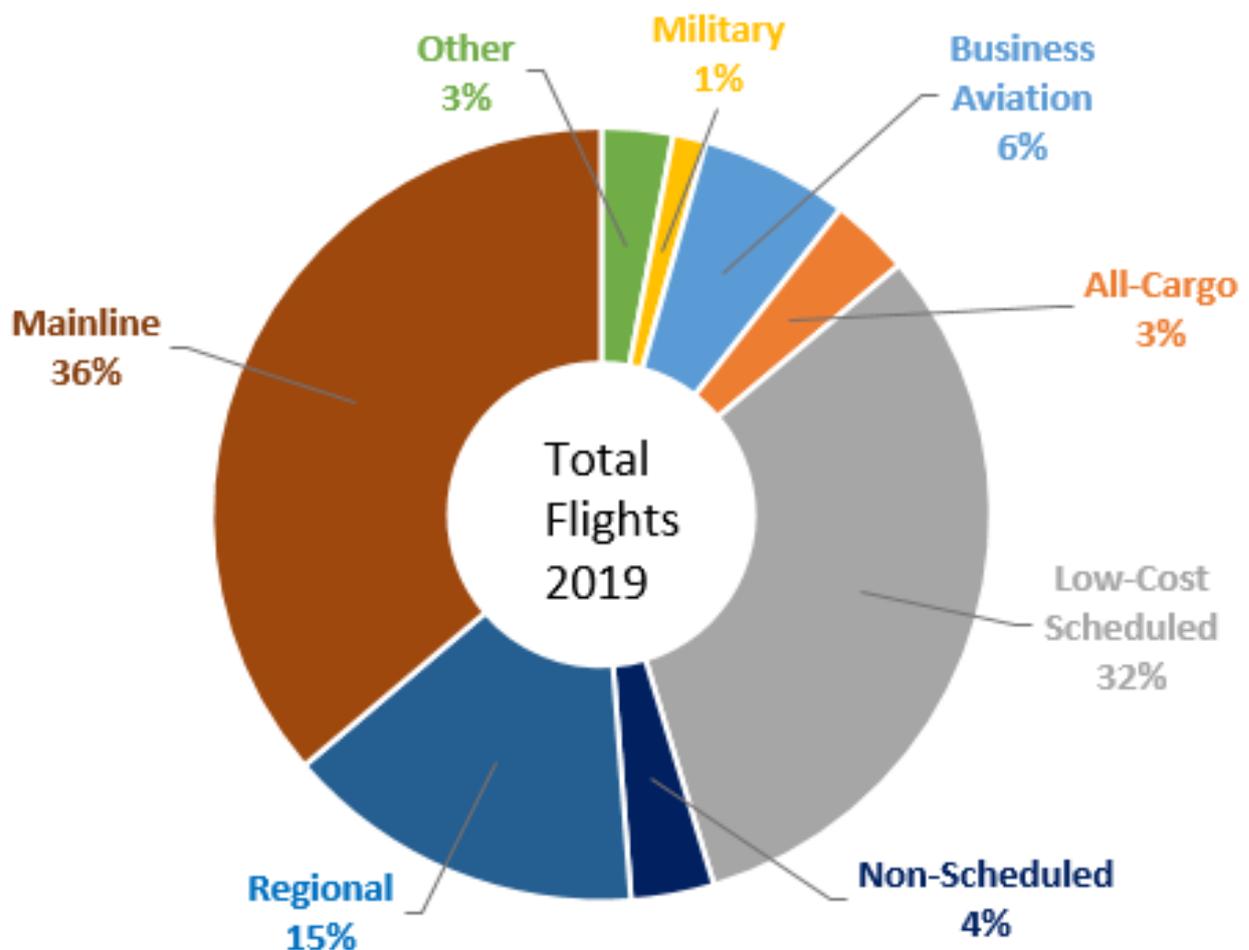


In 2022, the EUROCONTROL market segments rules have been reviewed and updated to better reflect the distribution of the IFR movements across different types of traffic. The “Traditional Scheduled” segment, which accounts for more than 50% of the European traffic¹, has been split into “Mainline” and “Regional”. Some additional refinements have been made: “All-Cargo” and “Low-Cost” rules have been revised, helicopter flights have been moved from “Charter” to “Other” and the “Business Aviation” rule has been refined too.

There are now eight market segments ([Figure 1](#)): “Mainline”, “Regional”, “Low-Cost”, “Business Aviation”, “All-Cargo”, “Charter” (Non-Scheduled), “Military” and “Other”. The last time the market segments had been fully reviewed was in 2016.

Figure 1: Share of 2019 flights according to the new market segments.



¹ Before COVID

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1. 2016 RULES: SEVEN MARKET SEGMENTS

Since 2004, STATFOR has been providing statistics on flights divided into seven different market segments: “Traditional Scheduled”, “Low-Cost”, “Business Aviation”, “All-Cargo”, “Charter”, “Military” and “Other”. This classification is based on a set of rules that use a mixture of operator, aircraft type and route information to determine the corresponding category. Since 2005, the definition of the rules have been reviewed regularly and documented (check the STATFOR Interactive Dashboard <https://www.eurocontrol.int/dashboard/statfor-interactive-dashboard>), to ensure they were still in phase with the business (i.e. integration of new operators, exclusion of defunct airlines, etc.). The last important revision was in 2016.

The market segments have been widely presented in EUROCONTROL publications, dashboards, and are used in the EUROCONTROL forecasts and in different analyses requiring finer details on types of operations. They are a EUROCONTROL definition and are not meant to match exactly definitions used by other statistics providers (e.g. ICAO, EBAA, ERAA). They are built to remain stable across the years, enabling monitoring and comparisons of traffic.

2. 2022 RULES: TRADITIONAL SCHEDULED SPLIT INTO “MAINLINE” AND “REGIONAL”

As shown in [Figure 2](#) (left graph), the “Traditional Scheduled” market segment included the biggest proportion of flights (more than 50%) and could hide specific information. To improve our definition, we have created a new segment “Regional” purely based on a selection of commercial flights operated by specific aircraft types (between 19 and 120 seats). This segment was created and validated by different experts inside and outside EUROCONTROL.

Hence, “Traditional Scheduled” is split into:

- 1) “Regional”: commercial flights by a list of regional aircraft types (19 – 120 seats). The objective of this segment is to better illustrate the connectivity between regions (so, short- and medium-hauls), which was previously mostly mixed with long-haul flights under the heading “Traditional Scheduled”. The creation of this segment helps to re-balance the proportion of flights within the categories.
- 2) “Mainline”: other scheduled flights, usually hub & spoke operations by airlines’ main operating units, using larger aircraft (>120 seats) and including long-haul operations.

Figure 2: Total Flights in 2019: market segment rules 2016 vs market segment rules 2022.

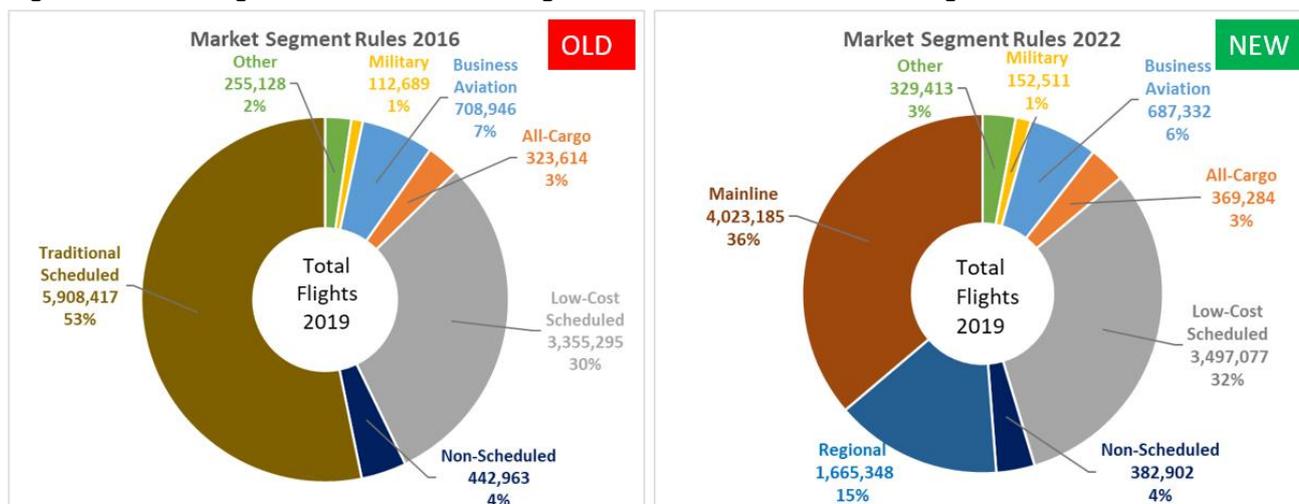


Figure 2 compares the classification of the 2019 flights: based on the previous rules (left) and on the new rules (right). Observations regarding the new rules include:

- Flights under the “Regional” rule account for 15% of the total traffic; whereas flights under the “Mainline” rule correspond to 36%. In the past, most flights of these categories were falling under the “Traditional Scheduled” segment which accounted for 53% of all flights.
- “Low-cost” share has slightly increased to 32%(from 30%) as some aircraft operators have been added in the definition.
- “Business Aviation” share is now 6% (slight decrease from 7%) as some flights were thought better to belong in the “Military” segment. For example, the TBM7 aircraft was defined as a “Business Aviation” aircraft type while it is widely used by the French Air Force. The priority of the rule has been modified by selecting military flights first, then business aviation.
- “Charter” (4%) (non-scheduled) remained stable, a slight decrease of 0.5 p.p. reflecting helicopter flights moved to “Other”.
- “All-Cargo” (3%) remained stable on the previous rule as minor changes have been brought to the definition.
- “Military” (1%) remained stable too, even if (a limited number of) additional flights have been considered.

3. PRIORITY RULES AND CRITERIA

Once flight criteria are defined, rules are applied according to a set of priorities listed in the [Market Segment Rules 2022](#).

Priority rules have been adapted to correct for observed misclassification:

- Priority rule changed for “Military” (was priority 2; is now priority 1);
- Priority rule changed for “Business Aviation” (was priority 1; is now priority 2).

This priority change has solved the issue of having flights with ICAO flight type M classified in “Business Aviation”.

Market Segment Rules 2022: “Charter”, “Other” & “Business Aviation”

- Helicopter flights (with ICAO Flight Type N) were moved from “Charter” to “Other” as they were mainly used for offshore oil platforms.
- Aircraft Type C68A operations have been moved from “Charter” to “Business Aviation”.

4. HIGH LEVEL DEFINITION OF THE EIGHT EUROCONTROL MARKET SEGMENTS

Our definition of market segments is based on rules matching specific criteria, being ICAO flight types filed in the flight plans, aircraft types, call signs, aircraft registrations, aircraft operators. [Figure 3](#) shows the market segment structure, a mix of commercial and non-commercial operations.

1. “Military”: flight with ICAO flight type M, defined by operator and or aircraft type;
2. “Business Aviation”: flight by a defined aircraft type ([Business Aviation Rule](#));
3. “All-Cargo”: flight by a defined airline, aircraft type, call sign or registration ([All-Cargo Rule](#));
4. “Low-Cost”: flight by a defined aircraft operator ([Low-Cost Rule](#));
5. “Regional”: commercial flight with ICAO flight type S operated by aircraft types with 19-120 seat configuration ([Regional Rule](#));
6. “Mainline”: flight with ICAO flight type S;
7. “Charter”: flight with ICAO flight type N, excluding helicopters;
8. “Other”: flight not classified into any other seven segments.

Figure 3 Market segments structure



Not to scale.

5. FAQ AND USEFUL DOCUMENTS

From when these market segments are defined?

From 2004 with two major updates, in 2012 and 2016, and several minor ones.

What are the rules behind each segment?

EUROCONTROL has defined rules for “Business Aviation”, “All-Cargo”, “Low-Cost”, “Regional” as well as “Military” segments. The “Charter” and “Mainline” segments are classified based on their ICAO flight type (respectively N and S). The last segment (“Other”) contains the flights do not fall in any of the previously mentioned segments. Rules are based on different criteria, depending on the segments. These criteria can be related to: aircraft operator, callsign, aircraft type, ICAO flight type. The complete list of rules for 2022 can be found [here](#).

In which order do you classify the flights?

There are priorities applied to classify each flight into a market segment. The order of the classification of the market segments can be found in the Definition [here](#).

When will you be reviewing the segments again?

A complete review is scheduled in 2024. There might be some changes to the current market segments rules before 2024, e.g. if a change occurs in the list of active carriers (e.g. creation of a low-cost airline) or in the list of business aircraft types.

From when the 2022 rules are applied?

The new rules have been (retroactively) deployed on the flight data from 2019.

The old rule (2016) remains valid for flights statistics before 2019.

What are the main differences between the 2016 rules and the 2022 rules?

A comparison is shown in Figure 2, however, from 2019 onwards only 2022 rules are displayed.

The biggest change between the 2016 market segments and 2022 market segments rules is the introduction of the “Regional” market segment, “taking” some flights out of “Mainline” (previously known as “Traditional Scheduled”). Other changes have been performed in the “Business Aviation” segment: some of the latter flights are thought better to belong in the “Military” segment. Lastly, the helicopter flights have been withdrawn from the “Charter” segment; they are now falling into the “Other” segment.

Any questions?

Please contact statfor.info@eurocontrol.int for any question related to market segmentation.

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