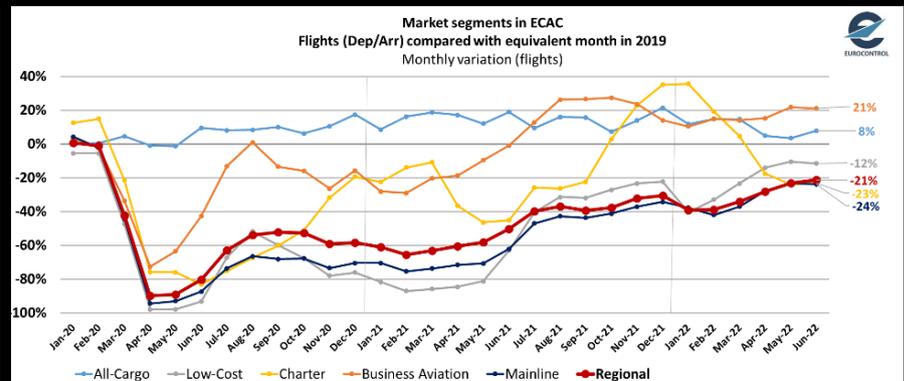
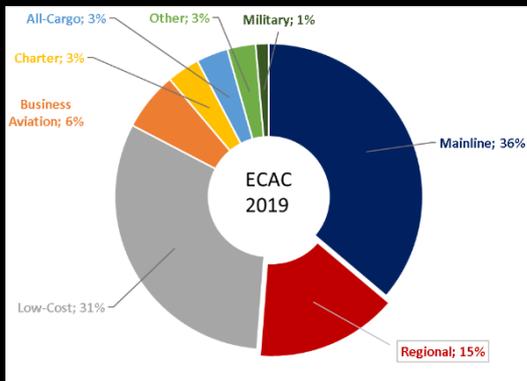


12 July 2022



(Left) Distribution of the flights per Market Segment for EUROPE (ECAC). (Right) Recovery of the ECAC flights (excluding overflights) per market segment since the start of the COVID-19 outbreak (vs 2019).

Understanding the complex business of aviation is made easier by using market segments. The definition of these should be fairly stable so trends can be seen; but sometimes a new segment is needed in order to provide better insights. Since 2005, EUROCONTROL has used five segments (Traditional Scheduled, Low-Cost, Charter, Business Aviation and All-Cargo) but we are now splitting 'Traditional Scheduled' into 'Mainline' and 'Regional' which account for 36% and 15% of flights respectively (2019 figures).

'Regional' flights have been defined as scheduled flights in aircraft with 19 to 120 seats; this segment focuses on short to medium-haul flights and separates them from larger aircraft, often flying long-haul. Overall, the new segmentation provides a better balance and greater clarity.

For example, we can now see that, for much of the pandemic, the Regional segment outperformed both Mainline and Low-Cost, as a result of fewer restrictions on domestic travel and the need/obligation to maintain air connectivity. This role is especially important in the countries with the largest share of Regional flights, where aviation is typically crucial for connectivity: Norway 32%, Finland 27%, Estonia 19% and Sweden 18%. Regional flights also make up 21% of the traffic in Spain's Canaries islands – providing inter-islands connectivity (all figures Jan-May 2022).

Over the same period, the top Regional aircraft were Embraer's 145-170-190 family (36% of Regional flights) followed by the ATR' 42-72 family (27%) and Bombardier's CRJ (16%). Regional flights are essential for connecting to major airports and 4.7% of them fly to or from Amsterdam Schiphol. Other key hubs are Warsaw (3.1%), Munich (2.9%), Frankfurt (2.8%) and Las Palmas (2.1%).

Note: These market segments are used in EUROCONTROL publications, dashboards, forecasts and analyses. They are not intended to match exactly the definitions used by other statistics providers such as ICAO, ERAA or EBAA. A full definition of all the market segments can be seen here [Market Segments Rules 2022](#).