AVIATION INTELLIGENCE+

European Aviation Trends

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The long-term decline of domestic flights in Europe

In recent years, growing concern has emerged around the environmental impact of domestic air travel in Europe. But beyond public perception, how has domestic aviation actually evolved over the past two decades? This paper takes a closer look at the long-term changes in domestic aviation, examining how globalisation, the rise of low-cost carriers, trends in travel behaviour, and the rise of alternative transport modes have reshaped the role of domestic flights in Europe.

While many countries have seen a decline in domestic air traffic, this is not a uniform trend. In fact, several regions stand out as exceptions—highlighting the diversity of domestic aviation patterns across the continent.

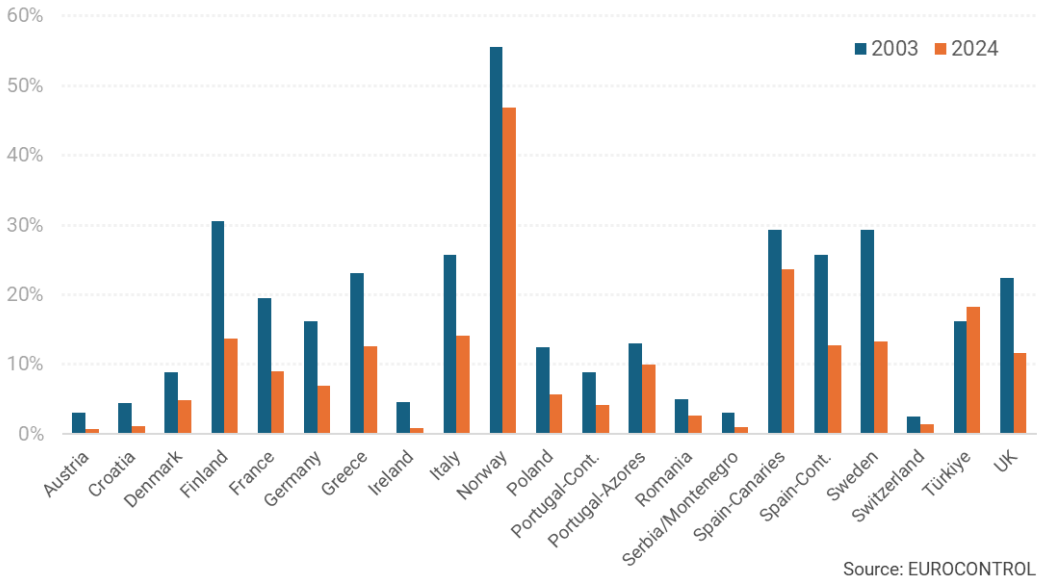
Growing shift towards internationalisation in aviation

In recent decades, the landscape of air travel in Europe has undergone a profound transformation. One of the most notable trends has been the increasing dominance of international flights over domestic travel. Domestic travel, which refers to flights connecting cities within the same country, has traditionally played a key role in ensuring regional connectivity. However, this role has diminished as cross-border connectivity, the liberalisation of the European aviation market, and the expanding networks of low-cost carriers have driven the growth of international air travel.

While domestic flights have historically played an essential role in connecting cities within individual countries, their relative importance in total air traffic has declined. As illustrated in Figure 1, across most European countries with significant domestic markets in 2003, the share of domestic flights as a proportion of total traffic has diminished over the past two decades. This decline highlights how internationalisation, supported by advances in infrastructure and the affordability of cross-border air travel, has reshaped the aviation landscape.

Interestingly, Türkiye stands as the only exception to this trend. Figure 1 also demonstrates this contrast, showing how the share of domestic flights in Türkiye has increased during the same period – a shift attributable to the country's unique geographical size, its growing aviation market, and strategic investments in domestic air travel infrastructure.

FIGURE 1: Share of domestic flights in total traffic (2024 vs 2003)



Source: EUROCONTROL

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FOUNDING MEMBER sesar JOINT UNDERTAKING
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Decline of domestic air travel

It is often overlooked that the decline in domestic air travel began well before the COVID-19 pandemic.

As depicted in Figure 2, the number of **domestic flights** across Europe's top 12 domestic markets has fluctuated significantly between 1990 and 2024. For each country, the figure shows the percentage and volume decrease in flights compared to their historical peak. Overall, **by 2024, these 12 markets combined had 1.5 million fewer domestic flights than at their respective peaks**, corresponding to a reduction equivalent to 14% of total European flights. Major countries such as Spain, France, the UK, Germany and Italy experienced drops of around 25% to 50% compared to their peak levels.

Figure 2 also highlights that more than 30 European countries reached their maximum number of domestic flights over a decade ago, with the entire European region peaking in 2007.

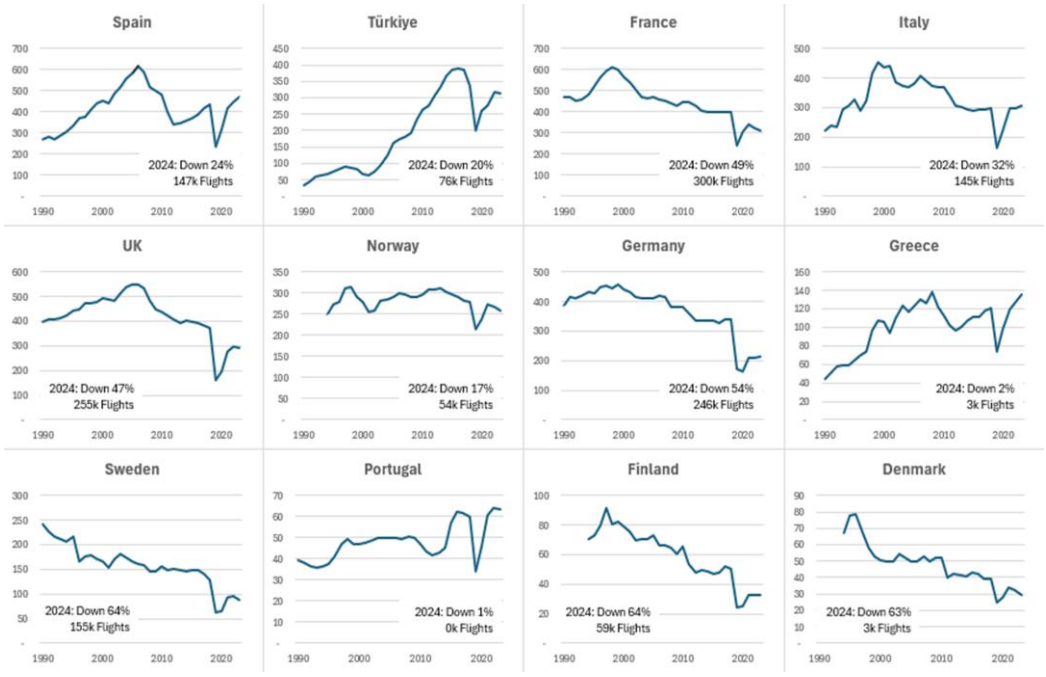
However, when looking at domestic **passenger numbers**, the picture is more nuanced (see Figure 3).

While the number of domestic aircraft movements has shown a long-term downward trend in most European countries, **domestic passenger volumes have remained stable or even increased in some cases**. When comparing domestic passengers (Figure 3) and domestic flights (Figure 2), several differences in long-term trends emerge, reflecting changes in airline strategies, aircraft utilisation, and travel behaviour. In some countries, the evolution of passengers and flights follows a similar pattern, while in others, the gap between the two indicators has widened over time.

To better illustrate this, Figure 3 highlights the difference between the number of domestic passengers in 2024 and the previous peak observed in each country. In most countries, the number of domestic passengers in 2024 remains below previous peaks, and is therefore indicated as "Down" in the figure. However, in a few countries, namely **Spain, Italy, Greece and Portugal, domestic passengers in 2024 surpassed their previous peaks**. In these cases, we have indicated "Up" in the figure, reflecting growth compared to their historical maximum. This comparison provides a clearer view of how domestic travel demand has evolved relative to past performance.

For instance, in **Türkiye**, the evolution of passenger volumes closely mirrors the trend in aircraft movements, with no major divergence. Similarly, Portugal shows stable patterns for both flights and passengers, suggesting little structural change.

FIGURE 2: Long-term evolution of domestic flights (thousands of flights)[1]



Source: EUROCONTROL

[1] Data for Spain include the Canary Islands, and data for Portugal include Madeira and the Azores.

However, in many other countries, domestic passenger volumes have proven more resilient than flight numbers. In **Spain**, for example, the number of domestic flights has decreased significantly since 2007, yet domestic passenger numbers have remained relatively stable. A similar divergence can be observed in **France** and **Italy**, where flights have declined more steeply than passenger volumes. This indicates an increase in load factors and/or a shift towards larger aircraft.

In **Greece**, the contrast is particularly striking: domestic flight numbers have remained stable or slightly decreased, while passenger volumes have risen steadily over the past two decades. This suggests strong domestic demand managed with fewer flights. In Norway as well, flight numbers have declined slightly, while passenger volumes have stayed broadly stable.

Overall, these differences highlight that a decline in domestic flight operations does not necessarily lead to a proportional drop in passenger numbers. Instead, many countries seem to have maintained or even increased domestic air travel demand by optimising capacity and improving load factors, despite operating fewer flights.

These trends set the stage for understanding the structural, infrastructural, and behavioural drivers behind the long-term decline of domestic air services.

Explaining the long-term decline

The long-term decline in domestic flights across Europe results from a combination of interconnected factors. These drivers can be grouped into three main categories: structural and market changes, improvements in alternative transport modes, and policy and behavioural shifts.

1. **Structural and market changes**

Expansion of point-to-point travel: The rise of low-cost carriers and point-to-point routes has reduced the need for domestic travel to major hub airports. Previously, passengers based in regional cities often had to travel to larger hubs, such as London, to access international flights. However, the expansion of point-to-point routes from secondary airports, along with the increasing role of Gulf hubs such as Dubai and Doha, has made it easier for travellers to bypass domestic connections. This shift has decreased reliance on traditional hub-and-spoke networks, contributing to the decline in domestic air travel.

Regional carriers ceasing operations: The disappearance of several regional airlines has further accelerated the decline of domestic flight options across Europe. A notable example includes the collapse of Flybe in the UK – first in March 2020 and again in January 2023 after a brief relaunch in 2022.

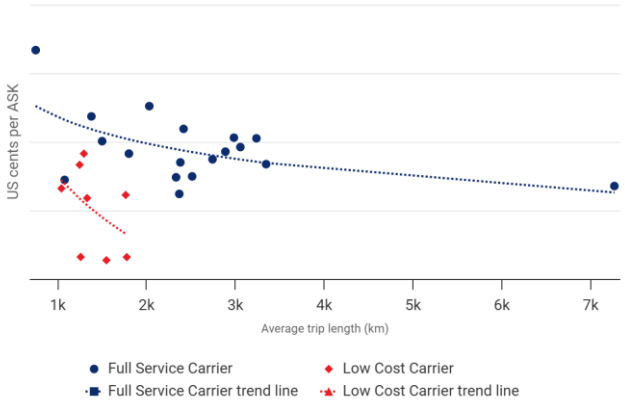
FIGURE 3: Long-term evolution of domestic passengers (millions of passengers)

Source: ACI

These failures have led to a loss of connectivity in many regions, forcing passengers to switch to alternative transport modes or travel longer distances to access international flights. A contributing factor to these closures is the extremely high Cost per Available Seat Kilometre (CASK) for regional carriers, which makes it very difficult to compete on routes with viable ground transport alternatives and/or low-cost carriers (LCCs) as competitors.

As shown in Figure 4, full-service carriers (which include many regional airlines) tend to have significantly higher CASK values compared to LCCs.

FIGURE 4: Cost per Available Seat Kilometre (CASK) versus average passenger trip length (km) 2024



Source: CAPA, Centre for Aviation

Figure 4 presents the CAPA Airline Unit Cost Index, an interactive graph plotting the relative positions of around 100 global airlines by CASK versus average trip length. Although no precise scale is shown on the y-axis, the unit of measurement is US cents per Available Seat Kilometre (ASK). The trendlines illustrate how CASK decreases as the average trip length increases, meaning that shorter-haul flights, typically operated by regional airlines, suffer from particularly high unit costs.

These structural challenges, combined with increasing competition from high-speed rail and low-cost airlines, have made it increasingly difficult for regional carriers to survive. Their steady disappearance has contributed to the broader shift towards fewer flights using larger aircraft, creating a dual impact on domestic flight volumes.

Increase in aircraft size: As already discussed, domestic passenger volumes (see Figure 3) have remained more stable or even increased in some countries despite a notable decline in the number of domestic flights (Figure 2). This divergence can be partly explained by the increasing size of aircraft being deployed on domestic routes, which has allowed airlines to maintain capacity while reducing the frequency of flights.

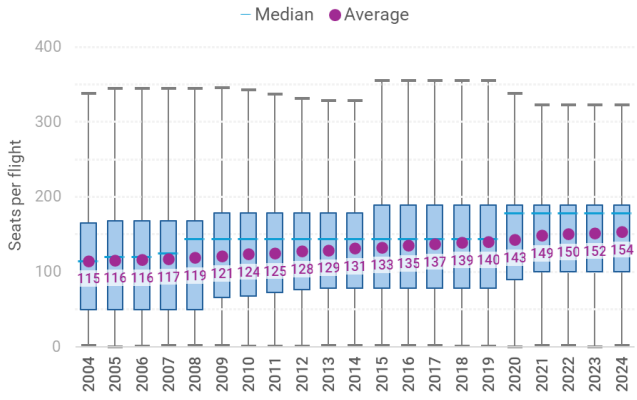
Faced with the high fixed costs of operating domestic services, especially on short routes, airlines have increasingly turned to larger aircraft to improve cost efficiency. Figure 5 shows the increase in the number of seats per departure for domestic flights in the European markets. **The average number of seats per flight has increased significantly, from 115 in 2004 to nearly 154 in 2024.**

This shift has been reinforced by the gradual retirement of smaller regional jets, particularly 50-seat aircraft, which have become uneconomical due to their high unit costs.

As a result, airlines have prioritised fleet simplification and efficiency, aligning capacity with demand through fewer, fuller flights. This optimisation strategy helps explain why the number of passengers has remained relatively resilient despite the long-term drop in domestic aircraft movements.

The trend towards larger aircraft has not occurred in isolation. It has been reinforced by the broader decline of regional carriers, as examined previously.

FIGURE 5: Evolution of seats per domestic flight in Europe (limited to the top 12 domestic markets)



Source: EUROCONTROL

2. Transport alternatives and infrastructure improvements

Improvement of alternative transport modes: The growing efficiency and convenience of alternative transport modes, particularly **high-speed rail** and road networks, has made them increasingly competitive with domestic air travel. Services such as Eurostar, TGV, ICE and AVE now offer faster, more efficient, and comfortable journeys for many routes, especially for city-centre-to-city-centre travel. For instance, high-speed rail connections such as Paris–Lyon, Madrid–Barcelona and Brussels–London have significantly reduced air traffic between these cities, demonstrating how rail can effectively replace short-haul flights when supported by strong infrastructure and service quality.

These improvements are not limited to rail. Well-developed and expanding **road networks** also facilitate smoother and faster travel by car or bus, making these options more appealing for short-distance trips. For example, in Romania, major investments in high-speed road infrastructure have accelerated in recent years, significantly improving travel times between key cities. Similar developments are visible in countries like Hungary and Croatia, where modern motorway systems support efficient regional mobility. Together, these developments make road transport a more viable and competitive alternative to short-haul domestic air travel.

Integration of transport modes: Airlines have implemented strategies, for example codesharing with train operators, to provide passengers with **seamless connections to their hub airports via air and rail services**. This enhances convenience for travellers connecting to long-haul flights while promoting environmentally friendly travel options. An example is Lufthansa Express Rail, which integrates train tickets with flight bookings to offer a smooth travel experience to and from hubs. Similarly, Air France's Air&Rail program exemplifies intermodality by offering passengers travelling to or from Brussels the convenience of a combined plane and train ticket. This integrated approach not only improves connectivity, but also supports sustainable travel by encouraging the use of high-speed rail for shorter distances.

3. Policy and behavioural shifts

Environmental concerns: Growing environmental awareness has prompted travellers to change their habits and opt for more **sustainable transportation options**. This shift is driven by discussions around aviation's carbon footprint and the broader push for greener travel. As a result, high-speed trains, widely considered eco-friendlier by the public, have gained in popularity. Intercity bus services, such as those offered by FlixBus, also appeal to environmentally conscious and budget-sensitive passengers, providing an accessible and greener alternative to short-haul flights.

Government policies and incentives: Various government policies encourage travellers to choose alternative modes of transportation. These include **subsidies** for train travel, **tax incentives** for eco-friendly options, and **restrictions** on short-haul flights where rail alternatives exist. For example, France has implemented a law banning domestic flights on routes where a train journey takes under 2.5 hours. In the same spirit, the French government has recently increased its aviation tax (known as the "solidarity tax"), with the new rates taking effect in March 2025. This tax applies to all flights departing from France and varies by distance and class.

However, not all countries are following the same direction. Some governments have revoked or softened similar measures in response to economic or political pressures. For instance, Sweden, after introducing a green aviation tax in 2018, announced in September 2024 that it would abolish the tax by July 2025, aiming to reduce flight costs and support the aviation sector.

Shifts in business practices: The widespread adoption of **teleconferencing and virtual meeting** technologies has significantly reduced the need for domestic business travel. Companies now rely on platforms such as Zoom and Microsoft Teams for real-time collaboration, cutting costs and improving efficiency. The COVID-19 pandemic accelerated this trend, proving that many in-person meetings could be replaced with virtual alternatives without major disruptions. As a result, businesses have integrated remote communication into their standard operations, leading to a sustained decline in short-haul air travel for corporate purposes.

While each of these factors plays a role in the long-term decline of domestic air travel, their relative importance varies across countries and contexts.

Resilience and regional variations in domestic air travel

Despite the overall decline in domestic flights across Europe, some countries and regions continue to maintain or even grow their domestic aviation markets. These variations highlight the fact that domestic air travel dynamics are shaped by **geography, policy, infrastructure, and national needs.**

Several factors explain this resilience:

- **Geographical constraints**: Countries with challenging topographies or dispersed populations often rely on air travel to ensure regional connectivity.
- **Island connectivity**: Air transport remains essential to link islands to the mainland.
- **Public Service Obligations (PSOs)**: Governments may elect to support air routes deemed socially necessary but commercially unviable.

Country examples:

- **Portugal**, including its island regions of Madeira and the Azores, has experienced a resurgence in domestic flights, surpassing its 2018 peak. This recovery underscores the crucial role of air travel in linking its mainland and island territories.
- **Greece**'s domestic flight market continues to grow, driven by the essential role of air travel in connecting its numerous islands.
- **Türkiye**, despite having a relatively modest domestic market given its size and population, has experienced rapid growth in domestic aviation that has only recently slowed. Notably, it is the only country in Europe where the share of domestic flights in total air traffic has increased over the past two decades, supported by strong internal demand and strategic investment in domestic connectivity.
- In Northern Europe, **Norway** stands out as a unique case. With its rugged terrain and extensive fjords, domestic flights are vital for ensuring essential connectivity. The country has maintained stability in its domestic flight market over the past two decades, largely due to its geographical challenges and the strategic role of PSO routes in safeguarding regional air links. This necessity has shielded Norway from the broader decline observed across much of Europe.

These national differences confirm that the decline in domestic air travel is far from uniform and that in certain contexts, domestic aviation continues to play a critical and growing role in regional connectivity.

Conclusions

Domestic aviation in Europe has experienced a substantial and persistent decline over the past two decades, with the number of flights in the top 12 domestic markets falling by approximately 1.5 million compared to their historical peak. This represents a reduction equivalent to 14% of total European flight volumes.

This trend has not been driven by a single factor, but rather by a combination of structural, infrastructural, and behavioural or policy-related changes. The expansions of point-to-point international travel, the collapse of some regional carriers, and the deployment of larger aircraft to operate the remaining routes have structurally reshaped domestic networks.

In parallel, the development of high-speed rail, improved road infrastructure, and intermodal solutions have reduced the competitiveness of short-haul flights. Finally, changes in business travel habits, growing environmental concerns, and government interventions (such as taxes and flight bans) have further contributed to the decline.

Yet, this trend is far from uniform. Countries such as Portugal, Greece, Türkiye and Norway have shown resilience or even growth in their domestic markets, due to specific national conditions including geography, island connectivity, or public service obligations. In many cases, passenger demand has remained stable, even as flight frequencies declined, a sign that airlines have adapted through larger aircraft and higher load factors.

Looking ahead, the role of domestic air travel in Europe will continue to evolve. Technological innovation, environmental regulation and intermodal integration will likely shape its future. The challenge for policymakers and the aviation sector will be to ensure that regional connectivity remains viable, efficient, and aligned with long-term sustainability goals, particularly in regions where alternatives to air travel are limited.