

# Trends in International Travel



## Part 2: Foreign Policy

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*Eno conducted an analysis of the international market for air travel in November 2018 for the Japan International Transport Institute. This multi-part ETW series details some of the most interesting facts and findings of that work. Although the research does not predict the future or propose any recommendations, the results are instructive for thinking about how international air service has evolved over the past few decades.*

*The data analyses use three data sources: (1) publicly available data from the U.S. Department of Transportation, (2) Sabre Corporation's Market Intelligence Data and Analytics, and (3) existing reports and other publically available information. The data from Sabre is not publically available, but the Eno Center for Transportation was able to gain access through a subscription paid for by the Japan International Transport Institute, USA. Sabre takes public and private data to create a suite of data resources to analyze traffic trends and fills in gaps missing in the T-100 data set. The data available during the creation of this report includes a "final" dataset from 2010-2017, where Sabre's algorithms verify the accuracy and update data points as necessary. The data set also includes "preliminary" MIDT (Marketing Information Data) data from 2002-2009. While this data is not as precise as the final dataset, it can provide enough information for broad trends.*

International travel hinges on complex agreements between countries that allow companies to transport people across borders. Open Skies agreements are the most common form of bilateral and multilateral international aviation agreements, setting up the possibility for airline alliances. While the industry and the public are generally in support of Open Skies, it is not without controversy.

Open Skies agreements are bilateral or multilateral air service agreements between two or more countries. They provide rights for private airlines to offer international passenger and cargo service between the countries without government control of routes, pricing, capacity, and schedules. Prior to Open Skies, bilateral agreements between countries determined fares and service frequencies.<sup>i</sup>

The first Open Skies agreement was reached between the United States and the Netherlands in 1992. Since then, the agreements have proliferated; the U.S now has agreements with 120 other countries. In addition to bilateral Open Skies air transport agreements, the United States has negotiated two multilateral Open Skies accords:

- The 2001 Multilateral Agreement on the Liberalization of International Air Transportation (MALIAT) with New Zealand, Singapore, Brunei, and Chile, later joined by Samoa, Tonga, and Mongolia; and
- The 2007 Air Transport Agreement with the European Community and its Member States.

Table 1 includes a list of all the Open Skies agreements that the U.S. has with other countries.

Table 1: Current U.S. Open Skies Agreements, October 2018

Partner	Applicatio	Date	Partner	Applicatio	Date
Netherlands <sup>i</sup>	In Force	10/14/92	Uruguay	In Force	10/20/04
Belgium <sup>i</sup>	Provisiona	3/1/95	India	In Force	1/15/05
Finland <sup>i</sup>	In Force	3/24/95	Paraguay	In Force	5/2/05
Denmark <sup>i</sup>	In Force	4/26/95	Maldives	In Force	5/5/05
Norway <sup>i</sup>	In Force	4/26/95	Ethiopia	In Force	5/17/05
Sweden <sup>i</sup>	In Force	4/26/95	Thailand	In Force	9/19/05
Luxembourg <sup>i</sup>	In Force	6/6/95	Mali	In Force	10/17/05
Austria <sup>i</sup>	In Force	6/14/95	Bosnia And Herzegovina	In Force	11/22/05
Iceland <sup>i</sup>	In Force	6/14/95	Cameroon	Provisiona	2/16/06
Switzerland	In Force	6/15/95	Cook Islands <sup>ii</sup>	In Force	2/28/06
Czech Republic <sup>i</sup>	In Force	12/8/95	Chad	Provisiona	5/31/06
Germany <sup>i</sup>	Provisiona	2/29/96	Kuwait	In Force	8/30/06
Jordan	In Force	11/10/96	Liberia	In Force	2/15/07
Singapore <sup>ii</sup>	In Force	1/22/97	Canada	In Force	3/12/07
Taiwan	In Force	2/28/97	Bulgaria <sup>i</sup>	Provisiona	4/30/07
Costa Rica	In Force	5/8/97	Cyprus <sup>i</sup>	Provisiona	4/30/07
El Salvador	In Force	5/8/97	Estonia <sup>i</sup>	Provisiona	4/30/07
Guatemala	In Force	5/8/97	Greece <sup>i</sup>	Provisiona	4/30/07
Honduras	Provisiona	5/8/97	Hungary <sup>i</sup>	Provisiona	4/30/07
Nicaragua	In Force	5/8/97	Ireland <sup>i</sup>	Provisiona	4/30/07

<b>Panama</b>	In Force	5/8/97	<b>Latvia<sup>i</sup></b>	Provisiona	4/30/07
<b>New Zealand<sup>ii</sup></b>	In Force	5/29/97	<b>Lithuania<sup>i</sup></b>	Provisiona	4/30/07
<b>Brunei<sup>ii</sup></b>	In Force	6/20/97	<b>Slovenia<sup>i</sup></b>	Provisiona	4/30/07
<b>Malaysia</b>	In Force	6/21/97	<b>Spain<sup>i</sup></b>	Provisiona	4/30/07
<b>Aruba</b>	In Force	9/18/97	<b>United Kingdom<sup>i</sup></b>	Provisiona	4/30/07
<b>Chile<sup>ii</sup></b>	In Force	10/28/97	<b>Georgia</b>	In Force	6/21/07
<b>Uzbekistan</b>	In Force	2/27/98	<b>Australia</b>	In Force	2/14/08
<b>Korea</b>	In Force	4/23/98	<b>Croatia</b>	In Force	3/13/08
<b>Peru</b>	In Force	6/10/98	<b>Kenya</b>	In Force	5/30/08
<b>Romania<sup>i</sup></b>	In Force	7/15/98	<b>Laos</b>	In Force	10/3/08
<b>Italy<sup>i</sup></b>	Provisiona	11/11/98	<b>Armenia</b>	In Force	10/6/08
<b>U.A.E.</b>	In Force	4/13/99	<b>Zambia</b>	In Force	3/16/10
<b>Pakistan</b>	In Force	4/29/99	<b>Israel</b>	In Force	4/23/10
<b>Bahrain</b>	In Force	5/24/99	<b>Trinidad &amp; Tobago</b>	In Force	5/1/10
<b>Tanzania</b>	Provisiona	11/3/99	<b>Barbados</b>	In Force	7/1/10
<b>Portugal<sup>i</sup></b>	In Force	12/22/99	<b>Japan</b>	In Force	10/25/10
<b>Slovak Republic<sup>i</sup></b>	In Force	1/7/00	<b>Colombia</b>	In Force	11/11/10
<b>Namibia</b>	C&R <sup>iii</sup>	2/4/00	<b>Brazil</b>	In Force	3/19/11
<b>Burkina Faso</b>	In Force	2/9/00	<b>Saudi Arabia</b>	In Force	4/18/11
<b>Turkey</b>	In Force	3/22/00	<b>St. Kitts</b>	In Force	11/28/11
<b>Gambia</b>	In Force	5/2/00	<b>Montenegro</b>	In Force	12/5/11
<b>Nigeria</b>	Provisiona	8/26/00	<b>Suriname</b>	In Force	6/21/12
<b>Morocco</b>	In Force	10/5/00	<b>Sierra Leone</b>	In Force	6/26/12
<b>Ghana</b>	In Force	10/11/00	<b>Macedonia</b>	In Force	8/23/12
<b>Rwanda</b>	In Force	10/11/00	<b>Sevchelles</b>	In Force	12/12/12
<b>Malta<sup>i</sup></b>	In Force	10/12/00	<b>Yemen</b>	C&R <sup>iii</sup>	12/12/12
<b>Benin</b>	In Force	11/28/00	<b>Guvana</b>	In Force	3/25/13
<b>Senegal</b>	In Force	12/15/00	<b>Bangladesh</b>	C&R <sup>iii</sup>	8/15/13
<b>Poland<sup>i</sup></b>	In Force	5/31/01	<b>Botswana</b>	In Force	12/12/13
<b>Oman</b>	In Force	9/16/01	<b>Equatorial Guinea</b>	In Force	8/7/14
<b>Qatar</b>	Provisiona	10/3/01	<b>Burundi</b>	C&R <sup>iii</sup>	11/18/14
<b>France<sup>i</sup></b>	In Force	10/19/01	<b>Togo</b>	In Force	4/7/15
<b>Sri Lanka</b>	In Force	11/1/01	<b>Serbia</b>	In Force	5/29/15
<b>Uganda</b>	In Force	6/4/02	<b>Ukraine</b>	In Force	7/14/15
<b>Cabo Verde</b>	In Force	6/21/02	<b>Côte d'Ivoire</b>	In Force	10/20/15
<b>Samoa<sup>ii</sup></b>	In Force	7/4/02	<b>Azerbaiian</b>	In Force	4/6/16
<b>Jamaica</b>	In Force	10/30/02	<b>Curacao<sup>iv</sup></b>	In Force	9/26/16
<b>Tonga<sup>ii</sup></b>	In Force	9/19/03	<b>Saint Vincent and the</b>	In Force	4/7/17
<b>Albania</b>	In Force	9/24/03	<b>Republic of the Congo</b>	C&R <sup>iii</sup>	5/30/17
<b>Madagascar</b>	In Force	3/10/04	<b>BES</b>	In Force	1/17/18
<b>Gabon</b>	In Force	5/26/04	<b>Guinea</b>	C&R <sup>iii</sup>	3/19/18
<b>Indonesia</b>	C&R <sup>iii</sup>	7/26/04	<b>Sint Maarten</b>	In Force	4/1/18
			<b>Grenada</b>	In Force	4/10/18



*Source: U.S. Department of State, Open Skies Partners, October 9, 2018*

*Table Notes:*

- i. The U.S.-EU Air Transport Agreement, signed April 30, 2007, was provisionally applied March 30, 2008 for all 27 European Union Member States at that time. Norway and Iceland became party to the U.S.-EU agreement pursuant to an agreement signed and provisionally applied June 11, 2011.*
- ii. Multilateral Agreement on the Liberalization of International Air Transportation*
- iii. Applied on the basis of comity and reciprocity*
- iv. The agreement is between the United States and the Kingdom of the Netherlands, in respect of Curacao.*

The U.S. Department of State supports Open Skies agreements, calling them “pro-consumer, pro-competition, and pro-growth ... Open Skies agreements improve flexibility for airline operations, expand cooperative marketing opportunities between airlines, enable global express delivery cargo networks, liberalize charter regulations, and commit both governments to high standards of safety and security.”<sup>ii</sup> An analysis by InterVISTAS Consulting found that liberalization of air service between two nations “will typically increase traffic by roughly 16 percent.”<sup>iii</sup> A 2015 study by the Brookings Institution yielded similar findings.<sup>iv</sup>

The U.S. does not have Open Skies agreements with several countries in Asia, including China, Vietnam, and the Philippines. In the case of China, the U.S. signed a 2007 non-Open Skies air transport protocol that includes restrictions on frequencies and code sharing.<sup>v</sup> Its language solidified what researchers called “the most liberal and flexible bilateral traffic rights regime” in China.<sup>vi</sup> Australia soon followed suit, signing a full open skies agreement with China at the end of 2016.

The barrier to a full bilateral Open Skies agreement between the U.S. and China boils down to slots for planes at airports. Currently, there are limits on the number of flights that U.S. airlines can operate to foreign airports and vice versa. For instance with China, past discussions to increase the allowed number of flights fell through because U.S. carriers feared Chinese airports would not have slots for the additional U.S. carrier flights or would grant priority slots to Chinese carriers.<sup>vii</sup> The Australia-China agreement was anticipated to benefit both countries, but with a heavy unbalance towards more business for the Chinese carriers.<sup>viii</sup> An Open Skies agreement with the U.S. would likely benefit China more than the U.S., thus increasing the barrier to incentivize the U.S. to negotiate.<sup>ix</sup>

The International Air Transport Association (IATA) believes increased airport capacity would mitigate problems around competition for slots.<sup>x</sup> Both the U.S. and China are funding and encouraging respective domestic airport construction in the next decade.<sup>xi</sup> Increased capacity could improve the environment for establishing an Open Skies agreement between the two countries. But Open Skies agreements also apply to freight aviation, not just passenger flights. This makes negotiations more complicated because of the current U.S. Administration’s protectionist stance on trade between the two countries.

There are also third-party countries that have a stake in Sino-U.S. aviation agreements. In recent years, Hong Kong and Tokyo have absorbed some of the passenger volume between the U.S. and China, providing a connection where those passengers may otherwise have taken non-stop flights (See analysis in Section 3). Cheaper fares, higher frequencies, and more flight options may be contributing to these new markets.<sup>xii</sup> Hong Kong does not have a domestic aviation market and thus has not entered open skies agreements with many countries.<sup>xiii</sup> In 2017, the Airport Authority of Hong Kong signed a Memorandum of Understanding with Paris airports operator Group ADP to co-operate in cargo flights.<sup>xiv</sup>

The Philippines and Vietnam have only recently entered Open Skies agreements with other countries. The Philippines signed its first agreement in 2016, when it joined the ASEAN Open Skies Policy for Southeast Asian countries.<sup>xv</sup> The country is improving the quality of their air service to match increased international competition.<sup>xvi</sup> Vietnam entered ASEAN Open Skies in 2015, and both its passenger and cargo aviation markets are expected to continue to expand as a result of increased demand and investment in additional airport capacity.<sup>xvii</sup> Research found no public knowledge of ongoing Open Skies negotiations between the U.S and Philippines and Vietnam.<sup>xviii</sup>

## From Open Skies to Airline Alliances

Airline alliances are cooperative agreements between U.S. and foreign carriers that establish limited marketing arrangements, such as a reciprocal frequent flier program or an international code-share agreement that allows an airline to sell seats on a partner's planes as if they were its own.<sup>xix</sup> Alliances make it easier for passengers to fly internationally, providing a seamless service between cities that otherwise would not have non-stop service on the same airline. To form these alliances, airlines need anti-trust immunity (ATI) from the U.S. Department of Transportation (DOT), and an Open Skies or similar type of agreement (such as the 2007 Sino-U.S. agreement) with the foreign carrier's home country is an essential prerequisite to receive the ATI grant.<sup>xx</sup>

The first airline alliance was between Northwest Airlines and KLM, a Dutch carrier, quickly following the first Open Skies agreement between the U.S. and the Netherlands. The benefits of ATI became so attractive to carriers following the KLM/Northwest decision that "foreign government interest in Open Skies relationships with the United States began to increase dramatically."<sup>xxi</sup>

The U.S. government has been very supportive of ATI-based alliances since the first one in the 1990s. The U.S. State Department wrote: "By allowing U.S. air carriers unlimited market access to our partners' markets and the right to fly to all intermediate and beyond points, Open Skies agreements provide maximum operational flexibility for airline alliances."<sup>xxii</sup>

Currently there are three primary airlines alliances (Table 2), and 79 percent of all international travelers to and from the United States fly on one of the three alliances (Figure 1). Most of passengers flying on non-alliance carriers tend to be traveling shorter distances, with those carriers largely serving markets in Canada, Mexico, and the Caribbean.<sup>xxiii</sup>

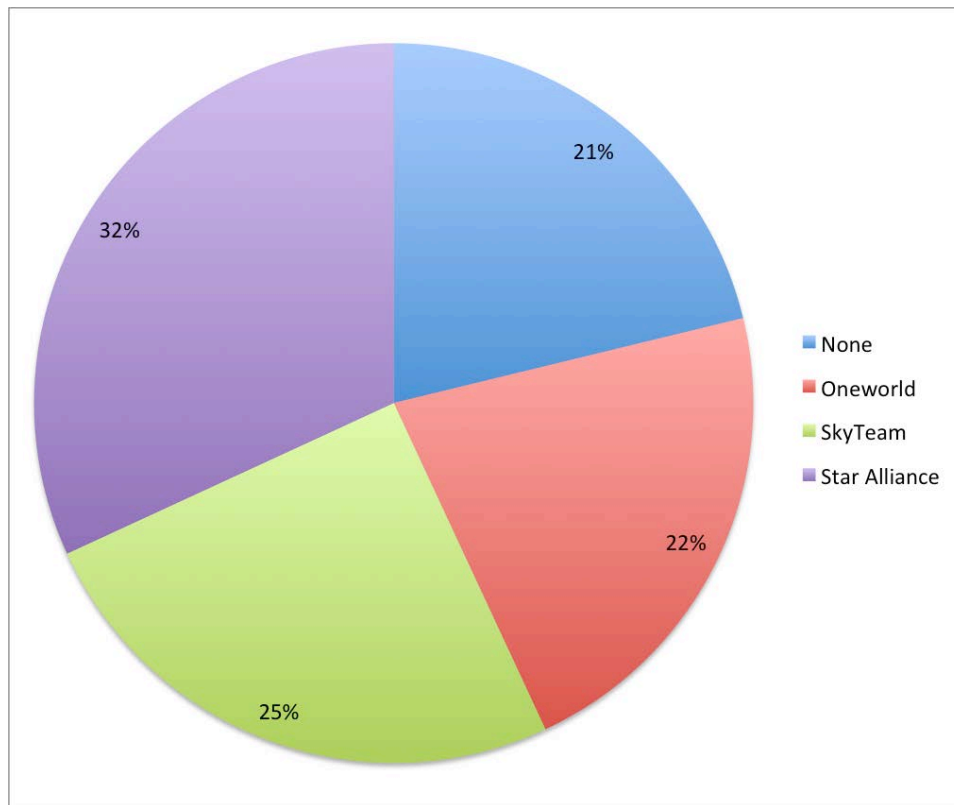
Table 2: The Major Three Airline Alliances

Star Alliance (1997)	Oneworld (1999)	SkyTeam (2000)
United Airlines*	American Airlines*	Delta Air Lines*
All Nippon Airways	Japan Airlines	China Airlines
Air China	Cathay Pacific*	China Eastern Airlines
Air India	Malaysia Airlines	China Southern Airlines
Asiana Airlines	Qatar Airways	Garuda Indonesia
EVA Air	Royal Jordanian	Korean Air*
Shenzhen Airlines	SriLankan Airlines	Middle East Airlines
Singapore Airlines	British Airways*	Saudia
Thai Airways International*	Finnair	Vietnam Airlines
Adria Airways	Iberia Airlines	XiamenAir
Aegean Airlines	S7 Airlines	Aeroflot
Austrian Airlines	LATAM	Air Europa
Brussels Airlines	Qantas	Air France*
Croatia Airlines		Alitalia
LOT Polish Airlines		Czech Airlines
Lufthansa*		KLM
Scandinavian Airlines*		TAROM
Swiss International Air Lines		Aerolíneas Argentinas
TAP Portugal		Aeroméxico*
Turkish Airlines		Kenya Airways
Avianca		
Copa Airlines		
EgyptAir		
Ethiopian Airlines		
South African Airways		
Air Canada*		
Air New Zealand		

*\*Founding Member*

*Sources: Star Alliance, Oneworld, SkyTeam*

Figure 1: US Departing Passengers by Alliance, 2017



Source: *Air Carrier Statistics (Form 41 T-100), "International Segment, 2017," Bureau of Transportation Statistics, 2018*

Since 2015, three additional alliances have formed: the Vanilla Alliance, U-Fly Alliance, and Value Alliance. These do not contain any U.S.-based airlines, and they are very small compared to the major three. Dozens of major airlines have not joined an alliance, including many domestic low cost carriers (Southwest, Frontier, JetBlue), gulf carriers (Etihad, Emirates), and low cost international carriers (RyanAir, Norwegian Air)

## Open Skies Controversies

Some Open Skies agreements have been controversial, particularly in the case of the U.S. agreements with Qatar and the United Arab Emirates. Traffic on Qatar Airways, Emirates, and Etihad Airways has increased dramatically since the signing of Open Skies agreements with their home countries. U.S. airlines claim that the Gulf carriers receive excessive state subsidies, and therefore they are not fair actors in the international aviation market.<sup>xxiv</sup> The three largest U.S. carriers launched a formal campaign in 2015 demanding that the Middle East increase transparency and work within the rules of the Open Skies agreement.

The provisions intended to allow a "fair and equal opportunity" for airlines in both countries to compete are specifically at issue. This entails government involvement to be limited to "protection of airlines from prices that are artificially low due to direct or indirect governmental subsidy or support." The major U.S. carriers claim that Qatar, Emirates, and Etihad are in violation of Open Skies because they allegedly have received \$52 billion

in direct government subsidies since 2004.<sup>xxv</sup>

Others counter by citing government subsidies and support for U.S. airlines in indirect ways.<sup>xxvi</sup> For example, bonds issued by state or municipal-owned airport authorities are tax-free. Thus, when an airline invests in an airport (e.g., building a new terminal), they typically let the airport authority issue the bonds so they can have better financing conditions than if the airlines went to market themselves. Chapter 11 bankruptcy laws could also be considered to be a subsidy since they allow airlines to restructure their debts or offload responsibilities for their pension liabilities.<sup>xxvii</sup>

In January 2018, the U.S. reached an agreement with Qatar to resolve the dispute, requiring Qatar Airlines to release audited financial statements, disclose transactions with state-owned entities, and commit to not increasing current flight schedules.<sup>xxviii</sup> Similar to the agreement the United Arab Emirates, Qatar committed to freeze plans for additional "fifth freedom" passenger flights. The U.S. freight carrier FedEx, which operates a Dubai hub and several "fifth freedom" flights, is unaffected in the agreement.<sup>xxix</sup> In press releases, Delta and American called the agreements and "important step" and a "step forward," indicating that more action might be needed after the release of audited financial statements.

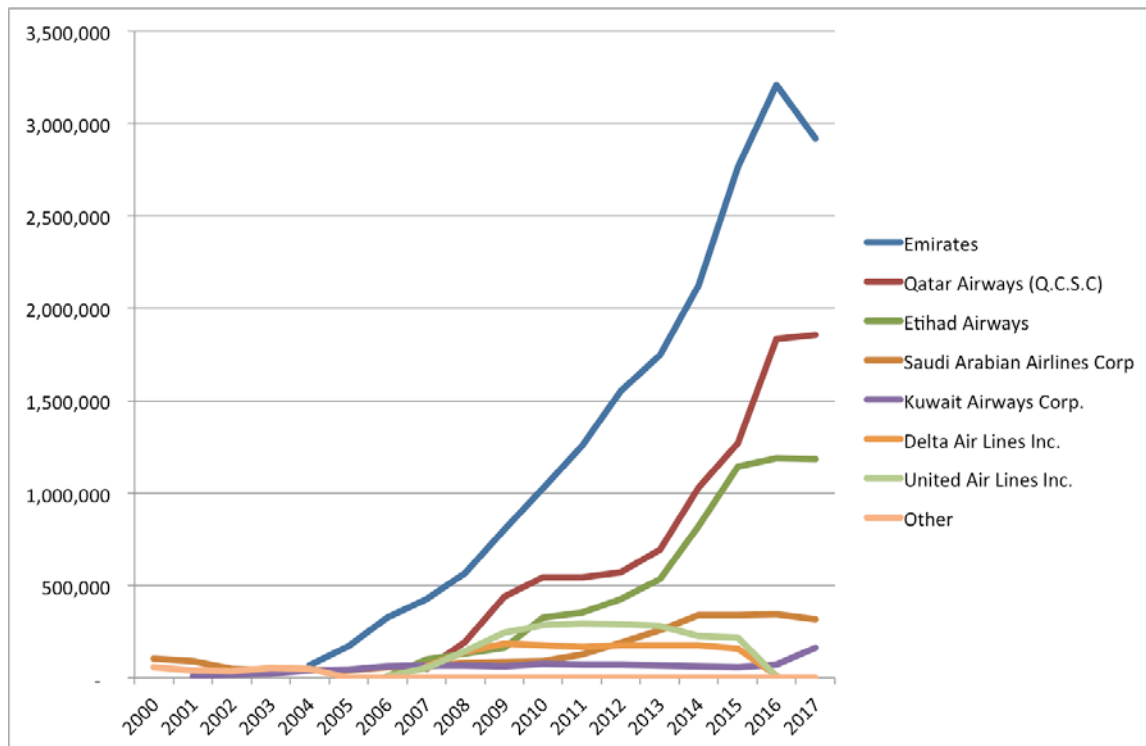
## Air Traffic on the Gulf Carriers

The attention paid to Open Skies and the Gulf Carriers is directly tied to their dramatic growth in passenger air traffic. Qatar Airways set up a hub in Qatar, and Emirates and Etihad Airways have hubs in the U.A.E. These airlines route passengers through their hubs to serve markets in the Middle East and Asia, with approximately 82 percent of all their traffic connecting to another destination. These airlines currently carry about 35 percent of all U.S. traffic to and from India. While a few non-stop U.S.-India routes exist, most of the other traffic connects through Europe or Asia.

Figure 2 shows the rapid growth of passenger traffic to Qatar and UAE, although 2017 data shows the carriers have cut back flights and halted their dramatic growth. Qatar, Emirates, and Etihad have all claimed they do not plan to add more flights in the coming years.



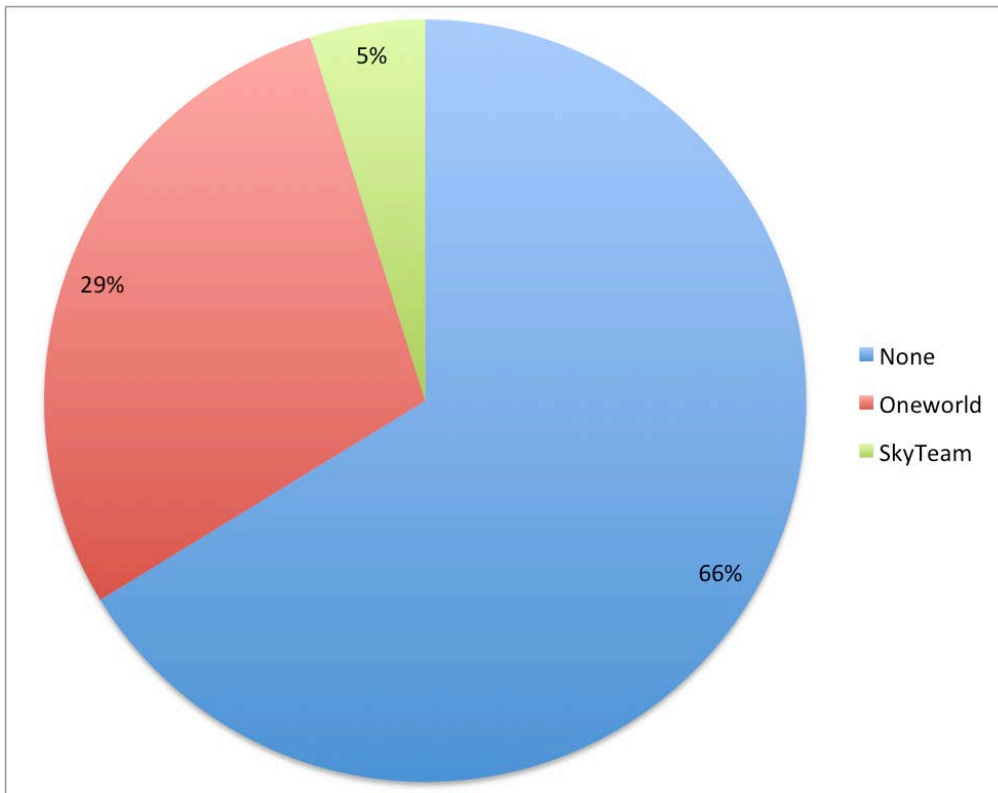
Figure 2: Departing Passengers to Gulf Countries



Source: Bureau of Transportation Statistics, T-100 International Market (All Carriers)

Qatar Airways participates in the Oneworld alliance, but Etihad and Emirates are not part of one of the three major airline alliances. This makes the U.S to Gulf market one of the few that has little interaction with airline alliances.

Figure 3: Passengers to Gulf, by Alliance, 2017



Source: Bureau of Transportation Statistics, T-100 International Market (All Carriers)

*[Continued in the third installment, which discusses the role of polar routing, aircraft design, and the changing dynamics of flights to Asian countries. Part 1 of the series can be found on the JITI website under Recent Studies.]*

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