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European air connectivity lags rising traffic volumes

Lower air connectivity hampers wider competitiveness and cohesion — and points to new aviation reality

Brussels and Istanbul, 2 July 2024: ACI EUROPE has today published its 2024 Airport Industry Connectivity Report¹: the definitive barometer of air connectivity in Europe. Released on the eve of the 34th ACI EUROPE Annual Congress & General Assembly, the report is based on the connectivity indexes developed by SEO Amsterdam Economics — the most comprehensive and complete tool for measuring and ranking airport connectivity.

The 2024 report reveals that total air connectivity (direct + indirect air connectivity) in Europe remains **-14%** below pre-pandemic (2019) levels. This is a weak improvement over last year's performance (2023 at -16%), and it stands in stark contrast with passenger volumes which are on the verge of a full recovery — and thus points to consumers and communities seeing fewer and more costly options².

The report also makes plain to see how geopolitical tensions and structural changes in the aviation market are resulting in altered connectivity patterns as well as significant performance variations amongst both national and individual airport markets.

Olivier Jankovec, Director General of ACI EUROPE said: *"If anything, this year's report shows that air connectivity should not be taken for granted. This is particularly relevant at a time when Europe is resetting its strategic direction for the next 5 years with a renewed focus on competitiveness and cohesion. As every 10% increase in direct air connectivity yields a 0.5% increase in GDP per capita, there is no doubt air connectivity is an essential part of competitiveness — be it at local, national or European level — and a key enabler of cohesion."*

He added: *"This means our policy makers must address the several factors that will further shape Europe's air connectivity, including climate action, technological progress and airline consolidation. Looking at climate action in particular, we have no choice but to progress towards decarbonising aviation while at the same time safeguarding the socio-economic benefits of air connectivity. This will require further flexibility and supportive measures in implementing the EU Fit for 55 framework."*

NON-EU+ MARKET UNDERPERFORMING & NATIONAL MARKET GAPS

While total air connectivity in the **EU+ markets**³ stands at **-13%** when compared to pre-pandemic (2019) levels, geopolitical tensions have driven the **non-EU+ market**⁴ to significantly underperform at **-20%**.

This mainly results from Ukrainian airports having lost all air connectivity whilst those in Russia (-43%) and Belarus (-87%) reporting dramatic drops in their total air connectivity. Israel (-42%) has also suffered major losses in that respect due to the ongoing conflict in Gaza.

Besides geopolitics, structural changes in the aviation market — in particular the prominence of leisure & Visiting Friends & Relatives (VFR) demand and the expansion of Ultra Low-Cost Carriers (LCCs) are also shaping the performance of national markets:

- Within the EU+ market, only 3 countries have fully recovered and exceeded their pre-pandemic (2019) total air connectivity levels: Greece (+22%), Iceland (+7%) and Portugal (+4%). Conversely, Finland (-37%), Sweden (-31%), Slovenia (-29%) along with the Czech Republic and Austria (both at -28%) remain far behind.

Amongst the largest EU+ markets, the best performance comes from heavily tourism-reliant Spain (-2%), followed by the UK (-12%), France (-15%) and Germany (-24%).

- In the non-EU+ market, the best performances in total air connectivity are reported by Albania (+55%), Uzbekistan (+29%) and Türkiye (+24%).

ISTANBUL, AMSTERDAM-SCHIPHOL AND LONDON-HEATHROW TOP DIRECT CONNECTIVITY RANKING

Istanbul (+9% since 2019) remains on top of the European ranking for direct connectivity, having moved up from the 5th position pre-pandemic (2019). The Turkish hub enjoys the best direct connectivity to the Middle East and second best to Asia-Pacific, with the latter having increased by a stunning +23% compared to last year.

Amsterdam-Schiphol (-6%) comes second, largely thanks to its excellent connectivity within Europe – although compared to last year, it has not seen its direct connectivity to Asia-Pacific (-1%) making gains and has also experienced a significant decrease in its direct connectivity to Latin America (-28%).

London-Heathrow (-2%) is now almost at the same level as Amsterdam-Schiphol and has nearly fully recovered its direct connectivity levels compared to pre-pandemic (2019). It remains unrivalled for its direct connectivity to North America, which is nearly twice that of its next competitor (Paris-CDG).

Amongst the top 20 airports for direct connectivity and apart from Istanbul, only the following ones have recovered or exceeded their pre-pandemic (2019) levels: **Athens** (+17%), **Palma de Mallorca** (+8%), **Dublin** (+3%), **Istanbul-Sabiha Gökçen** (+3%), **Lisbon** (+3%) and **Rome-Fiumicino** (0%).

This once again reflects the prominence of leisure & VFR demand along with LCCs' expansion. While the direct connectivity offered by **LCCs**

from European airports has increased by **+18%** since 2019, the direct connectivity offered by **Full-Service Carriers** (FSCs) has shrunk by **-16%**.

FAST AND FURIOUS: CONNECTIVITY GAINS AMONGST LARGE, MEDIUM & SMALL AIRPORTS

When compared to pre-pandemic (2019) levels, the following airports posted the highest increases in direct connectivity:

- Large airports (25 to 10 million passengers per annum): **Bergamo** (+38%), **Sochi** (+35%), **Tenerife-South** (+26%), **Málaga** (+15%) and **Naples** (+15%).
- Medium airports (10 to 1 million passengers per annum): **Tirana** (+186%), **Trapani** (+143%), **Zadar** (+108%), **Samarkand** (+103%) and **Beauvais** (+78%).
- Small airports (Less than 1 million passengers per annum): **Pardubice** (+350%), **Karlovy Vary** (+300%), **Perugia** (+240%) and **Castellón** (+178%).

Despite the impressive gains from some, small airports have significantly underperformed when it comes to recovering their direct connectivity compared to the other segments of the airport industry. This is down to airlines generally favouring larger markets, with FSCs having reduced their direct connectivity from small airports by -32% and LCCs by -6% when compared to pre-pandemic (2019) levels.

FRANKFURT TOPS GLOBAL HUB RANKING

Frankfurt remains in the top position globally for hub connectivity despite posting -23% below its pre-pandemic (2019) level. The German hub is followed by **Dallas Fort Worth** (-4%) and **Istanbul**, which has seen its hub connectivity expanding by **+37%** since 2019.

Overall, hub connectivity across Europe remains **-18%** below its pre-pandemic (2019) level this year, and thus keeps significantly underperforming against direct connectivity (**-8%**). Although the gap has narrowed somewhat over the past 3 years, it remains significant — pointing to structural hub shrinkage and reflecting changed connectivity patterns.

ADJUSTED CONNECTIVITY: THE POWER CITY ACCESS INDEX

This year for the first time, the report includes a new index shedding light on connectivity from a more qualitative point of view. The **Power City Access index** combines airport connectivity with its linkages to the service sector and the economic importance of the destinations.

London-Heathrow comes in pole position in the Power City Index, followed by **Paris-CDG** and **Amsterdam-Schiphol**.

The *Power City Access* index also identifies smaller airports that manage to maximise their network from a quality point of view to the

benefit of the local communities they serve. The ranking of outperformers exceeding their *direct connectivity* rank by up to 500 points with their *Power City Access* position is topped by **Stockholm Västerås, León, Linz, Łódź** and **Stockholm Skavsta** airports.

¹ [ACI EUROPE Airport Industry Connectivity Report 2024](#)

² Air fares for intra-European travel in July 2024 (3 months advanced purchase) are up by +37% compared to 2019 (source: RDC)

³ EU, EEA, Switzerland and the UK

⁴ Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, North Macedonia, Moldova, Montenegro, Russia, Serbia, Türkiye, Ukraine and Uzbekistan

ENDS

Note to editors

For the first time this year, ACI EUROPE has developed a [fully digital version](#) of the report to enhance accessibility of the data.

TYPES OF CONNECTIVITY

Direct connectivity: These are the direct air services available from the airport – measured not just in terms of destinations, but also factoring in the frequency of flights to the same destination (so for example, an airport with 5 daily flights to another airport, will register a higher score than one with only 4).

Indirect connectivity: This measures the number of places people can fly to, through a connecting flight at hub airports from a particular airport. For example, if you fly from Cork to a hub airport such as Amsterdam Schiphol, that's a direct flight from A to B. But with the vast choice of onward destinations you can fly to from there – the large number of available onward connections from these airports expands the range of destinations available from the airport of origin. Indirect connections are weighted according to their quality, based on connecting time and detour involved with the indirect routing. For example, a flight from Manchester to Johannesburg via Paris-Charles de Gaulle will register a higher score than an alternative routing via Doha.

Airport connectivity or total air connectivity: As the name suggests, this is the most comprehensive metric for airport connectivity – taking into account both direct and indirect connectivity from the airport in question. Airport connectivity is defined as the sum of direct and indirect connectivity – thus measuring the overall level to which an airport is connected to the rest of the World, either by direct flights or indirect connections via other airports.

Hub connectivity: Hub connectivity measures the number of connecting flights that can be facilitated by the hub airport in question – taking into account a minimum and maximum connecting time, and weighing the quality of the connections by the detour involved and connecting times.

For more information, contact:

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ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents over 500 airports in 55 countries. Our members facilitate over 90% of commercial air traffic

in Europe. Air transport supports 13.5 million jobs, generating €886 billion in European economic activity (4.4% of GDP). In response to the Climate Emergency, in June 2019 our members committed to achieving Net Zero carbon emissions for operations under their control by 2050, without offsetting.