ACI EUROPE
AIRPORTS COUNCIL INTERNATIONAL

2050 NET ZERO

AIRPORT INDUSTRY CONNECTIVITY REPORT 2025


Terminal 3
MRT

FOREWORD

This 2025 edition of our Airport Industry Connectivity Report comes at both a critical and interesting time.

Politically, the strong focus on decarbonising our economies (including aviation) has somewhat taken a back seat, with priorities shifted towards building up defence capabilities, addressing our competitiveness gap and safeguarding Europe's social model and cohesion.

In all of this, *air connectivity* is extremely relevant – as expressly recognised by the Draghi report.

Indeed, *air connectivity* is an essential part of strategic autonomy, both in defence and economic terms. Airports are critical infrastructure for military mobility and with every +10% increase in direct connectivity automatically yielding a +0.5% growth in GDP per capita, *air connectivity* is a major driver of both competitiveness and territorial equality.

While many of our trading partners (or should we rather now say "geo-economic competitors"?) have long recognised and capitalised on the value of *air connectivity* as part of their economic development strategies, those doing so in Europe are a rather rare breed – with Türkiye obviously being a notable exception, and the United Kingdom intent on doing the same.

Now is the time for a reality check and for Governments and policy makers (particularly in the EU) to look at *air connectivity* strategically. This means taking stock of the fact that *air connectivity*, and with it aviation, are not just about soft power. Rather, they deliver crucial economic and social benefits, ensure effective global positioning – and can even play a role in projecting hard power capabilities.

By contributing to a better understanding of *air connectivity* dynamics across our continent, I hope the data and analysis contained in this report will make a meaningful contribution to future-proofing the *air connectivity* that is inherent to our European way of life. This requires safeguarding and developing *air connectivity* all while making it more sustainable and delivering on our Net Zero commitments.

Olivier Jankovec
ACI EUROPE Director General

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1. PASSENGER PERSPECTIVE OF AIR CONNECTIVITY

The "Air Connectivity Index" is created by SEO Amsterdam Economics using their proprietary NetScan model.

Air connectivity **is measured from the perspective of the air traveller: when flying from an airport, how many destinations can that passenger reach, including direct and connecting itineraries?**

Air Connectivity = Direct Connectivity + Indirect 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 destinations available through an onward connecting flight at hub airports from a particular airport. Indirect connections are weighted according to their quality, based on connecting time and detour involved with the indirect routing. For example, a flight from Hamburg to Johannesburg via Frankfurt will register a higher score than an alternative routing via Doha, which is geographically a longer diversion from the direct flight path.

Hub Connectivity

Hub connectivity is the key metric for any hub airport, big or small, alongside their direct destinations offered. It 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.

The airport grouping system is based on the total annual passengers in 2024.
Majors include airports with over 40 million passengers.
Mega airports consist of airports with 25 to 40 million passengers.
Large airports are comprised of airports with 10 to 25 million passengers.
Medium airports include airports with 1 to 10 million passengers.
Small airports cover airports with less than 1 million passengers.

2.
EUROPEAN AIR CONNECTIVITY
— *OVERVIEW*

- Air connectivity recovery trailing passenger traffic recovery
- Non-EU+ market still below European average due to geopolitics
- Direct air connectivity keeps outperforming indirect air connectivity
- Only half of European countries have exceeded their 2019 air connectivity levels with significant air connectivity performance gaps amongst national markets – from +73% down to -43% (vs. 2019)
- Best performing countries vs. 2019: Greece, Portugal, and Cyprus in the EU+ and Uzbekistan, Albania, Bosnia and Herzegovina in the rest of Europe
- Countries taxing aviation underperforming for air connectivity

2.1. AIR CONNECTIVITY RECOVERY STILL INCOMPLETE

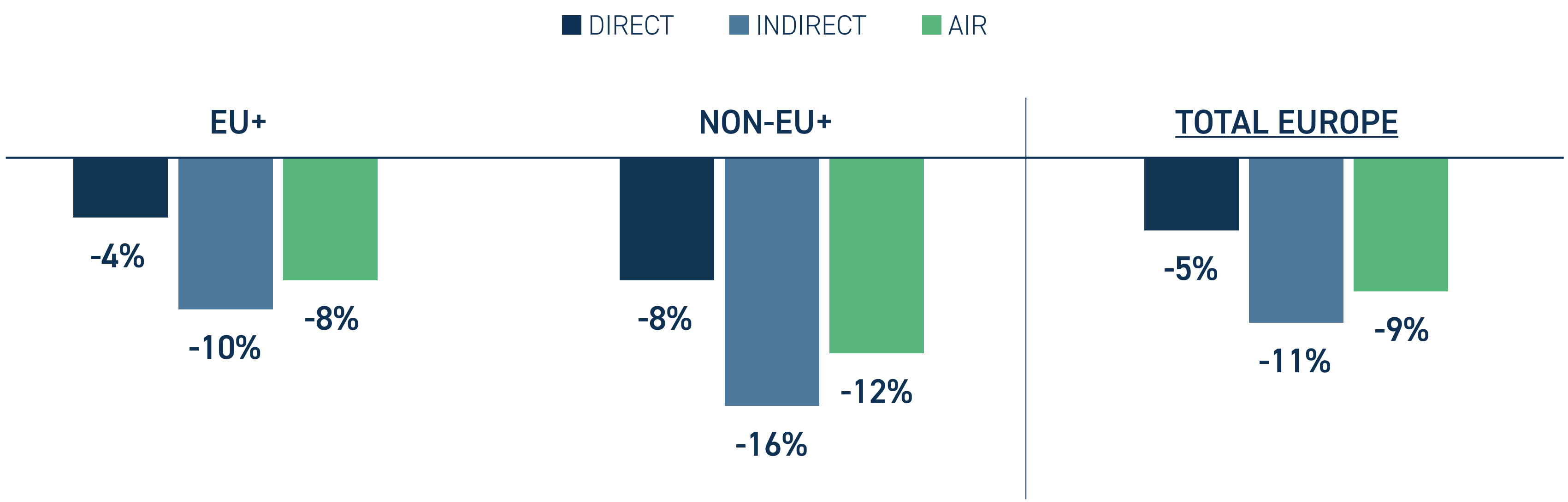
Despite increasing by **+7%** in 2025 over the preceding year, ***air connectivity* in Europe still remains -9% below pre-pandemic (2019) levels.**

The disconnect between *air connectivity* and passenger traffic, which for full year 2024 exceeded 2019 levels by +2%, shows the extent to which airlines have increased passengers per aircraft movement and at the same time remained cautious about adding new routes and increasing frequencies on existing ones. This is largely a result of supply and efficiency pressures as well as a focus on yield optimisation – from ongoing aircraft delivery delays and maintenance issues to aircraft up-gauging, and the increased use of high-capacity single aisle aircraft by Low-Cost Carriers (LCCs), to the pursuit of higher load factors.

- The **EU+ market** at **-8%** vs. 2019 has recovered more ***air connectivity*** than the rest of Europe – as the **non-EU+ market** remains at **-12%**, largely due to the impact of conflicts in Ukraine, Russia, and Belarus.

- As in previous years, **a significant gap remains between the recovery of *direct connectivity* (-5% vs. 2019) and *indirect connectivity* (-11% vs. 2019)**. This reflects the changed structure of the European aviation market – in particular, the expansion of Ultra-Low-Cost Carriers (LCCs) during the recovery from the Covid-19 pandemic and the relative retrenchment of Full-Service Carriers (FSCs).

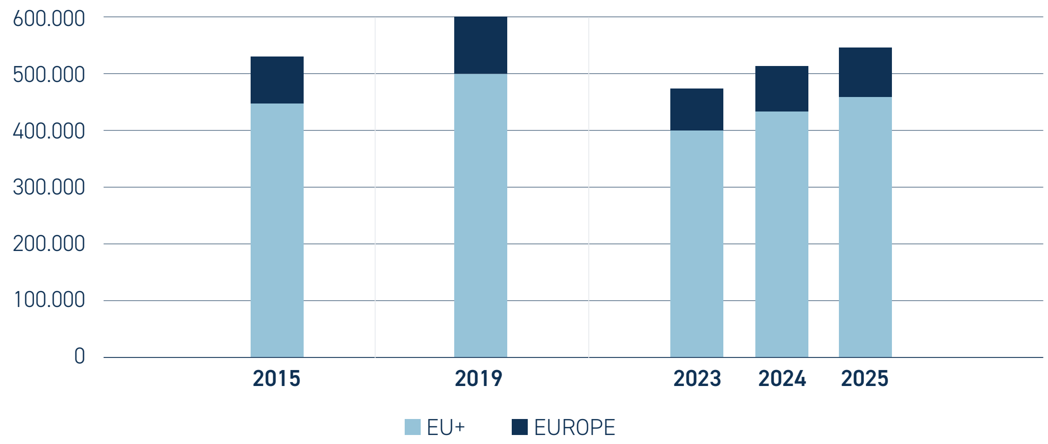
Chart 1:
DIRECT, INDIRECT & AIR CONNECTIVITY (EU+, NON-EU+ AND ALL EUROPEAN AIRPORTS — 2025 VS. 2019)



2.2. TEN YEAR PERSPECTIVE

The evolution of ***air connectivity*** over the past decade shows the dramatic impact of the Covid-19 pandemic as well as how **structural aviation market changes** and **geopolitics** are redefining air connectivity.

Chart 2:
ANNUAL AIR CONNECTIVITY (EU+ AND ALL EUROPEAN AIRPORTS)



2.3. COUNTRY LEVEL

Air connectivity at national level reflects a mix of factors, including economic performance, trade links and openness, diasporas, inbound and outbound leisure demand, and of course geographical position. But *air connectivity* is also increasingly shaped by national and regional aviation policies, regulation, taxation – and the overall support (or lack of it) for the aviation sector.

- Approximately half of the countries in the ACI EUROPE region (24 out of 52 countries) have now achieved their 2019 level of ***air connectivity*** – with just one third of the EU+ countries (10 out of 31) having done so.
- The top ***air connectivity*** performances compared to 2019 come from **Uzbekistan (+73%)**, **Albania (+56%)**, **Bosnia and Herzegovina (+40%)**, **Türkiye (+36%)** and **Greece (+35%)**.
- The slowest to recover to 2019 ***air connectivity*** levels are **Sweden (-33%)**, **the Russian Federation (-43%)** and **Finland (-30%)**[1]. This largely reflects the impact of geopolitics.
- Small countries **outside of the EU+ area** have shown especially strong ***air connectivity*** performance: **Uzbekistan (+73%)**, **Bosnia and Herzegovina (+40%)**, **Armenia (+36%)** and **Albania (+56%)** have all seen exponential gains from acceptedly smaller bases – reflecting a rapid increase in their population's Propensity to Fly.

[1] Excluding Ukraine which has had its airports closed and Belarus where data is limited.

Chart 3:
% CHANGE IN AIR CONNECTIVITY – RANKED BY % CHANGE VS. 2019

EU+

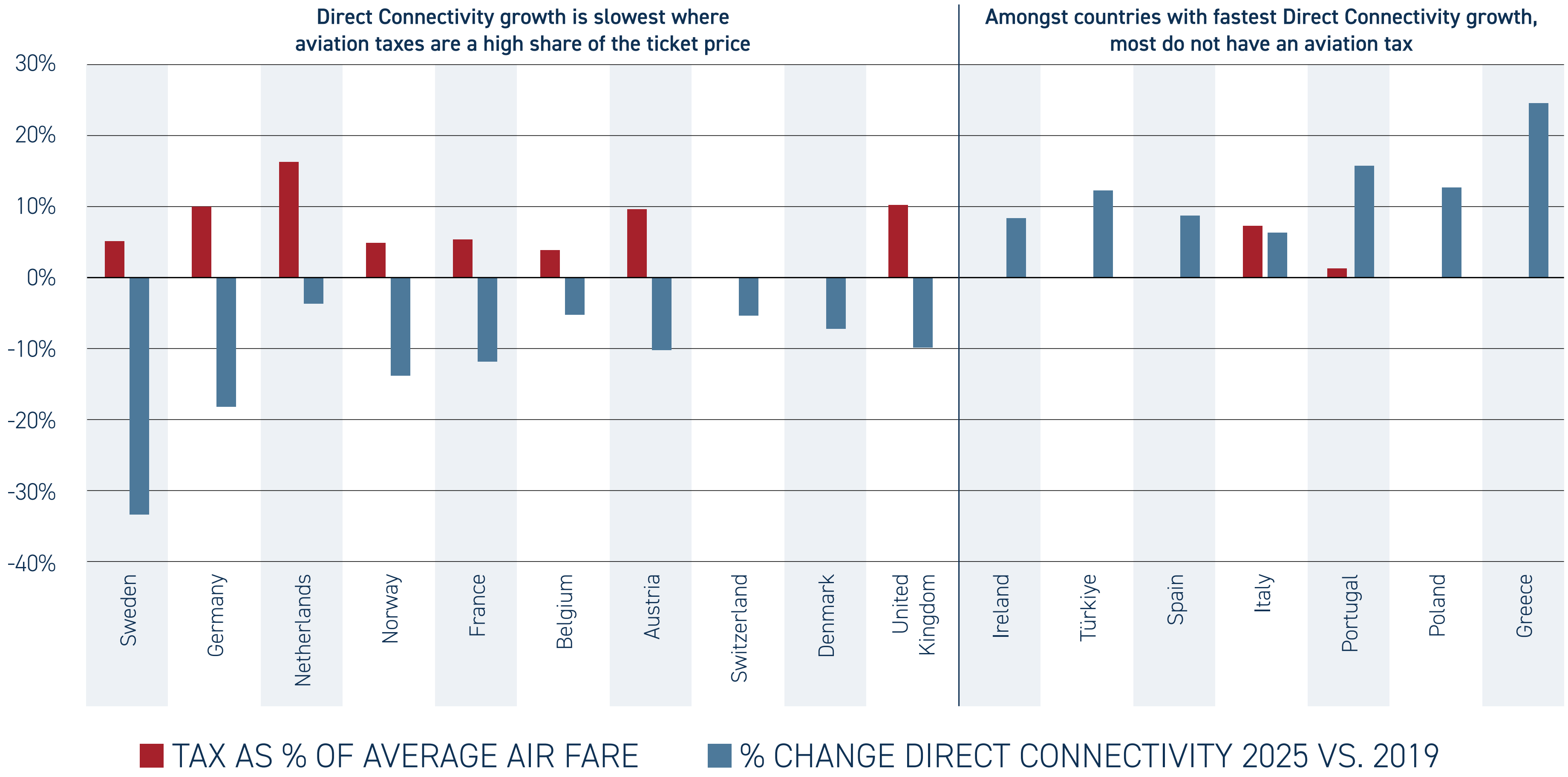
	Country	2025 VS. 2019	2025 VS. 2024
1	Greece	+35%	+10%
2	Portugal	+10%	+6%
3	Cyprus	+8%	+13%
4	Spain	+3%	+5%
5	Ireland	+3%	+8%
6	Croatia	+3%	+10%
7	Iceland	+2%	-5%
8	Lithuania	+2%	+15%
9	Poland	+1%	+10%
10	Italy	+1%	+9%
11	Estonia	-1%	+1%
12	Romania	-1%	+11%
13	United Kingdom	-7%	+6%
14	Slovakia	-9%	+18%
15	Netherlands	-9%	+10%
16	Belgium	-11%	+9%
17	Bulgaria	-12%	+15%
18	Switzerland	-12%	+5%
19	Denmark	-12%	+1%
20	Slovenia	-12%	+23%
21	Norway	-13%	+0%
22	Luxembourg	-13%	+4%
23	France	-14%	+1%
24	Hungary	-14%	+11%
25	Malta	-15%	+11%
26	Latvia	-18%	+8%
27	Germany	-21%	+5%
28	Austria	-21%	+10%
29	Czechia	-22%	+8%
30	Finland	-30%	+11%
31	Sweden	-33%	-4%

NON-EU+

	Country	2025 VS. 2019	2025 VS. 2024
1	Uzbekistan	+73%	+34%
2	Albania	+56%	+1%
3	Bosnia and Herzegovina	+40%	+19%
4	Türkiye	+36%	+10%
5	Armenia	+36%	+21%
6	Tajikistan	+28%	-8%
7	Turkmenistan	+21%	+31%
8	North Macedonia	+17%	+16%
9	Georgia	+15%	+15%
10	Serbia	+8%	+10%
11	Azerbaijan	+7%	-9%
12	Moldova	+4%	+32%
13	Kyrgyzstan	+4%	+5%
14	Kosovo	+1%	+22%
15	Kazakhstan	-3%	+22%
16	Montenegro	-6%	+9%
17	Israel	-21%	+36%
18	Russia	-43%	+0%
19	Belarus	-70%	+142%
20	Ukraine	-100%	NA

It is striking to see the relationship between national taxes on aviation and air connectivity underperformance. **Most of the countries where *air connectivity* remains below pre-pandemic (2019) levels are countries where punitive passenger taxes are in effect** – as shown by the graph below, which brings together the level of national aviation taxes compared to direct *air connectivity* performance.

Chart 4:
DIRECT CONNECTIVITY GROWTH VS. TAX AS % OF AVERAGE AIR FARE



ACI EUROPE analysis. Government taxes, using the tax rate paid by median traveller, divided by average economy class fare, average of departing flights from country in 2024 RDC Apex.

2.4. AIRPORT INDUSTRY SEGMENTS

The recovery in *air connectivity* is significantly weaker in the Small airport size category.

- For the **Major (more than 40 million passengers per annum) and Mega airports (25-40 million passengers)**, their comparatively stronger performance vs. 2019 reflects the attractiveness of their markets and resilience of their network, despite capacity constraints and requirements to use airport slots – with airlines using controlled capacity.

- **Large airports (10-25 million passengers)** have also nearly recovered *direct connectivity* thanks to higher LCC penetration, but they are seeing their *indirect connectivity* impacted by the relative retrenchment of FSCs on their hubs. The same market dynamics have led to a full recovery of *direct connectivity* at **Medium airports (1-10 million passengers)**.

- Meanwhile, air connectivity at **Small airports (less than 1 million passengers)** remains **-13%** below their pre-pandemic (2019) levels, with **both their *direct* and *indirect connectivity*** clearly **underperforming**. This involves lost opportunities for business, investment, tourism, and visiting family and friends for these airports serving Europe's regions and islands.

Chart 5:
DIRECT, INDIRECT & AIR CONNECTIVITY
(EUROPEAN AIRPORTS BY TRAFFIC CATEGORIES — 2025 VS. 2019)

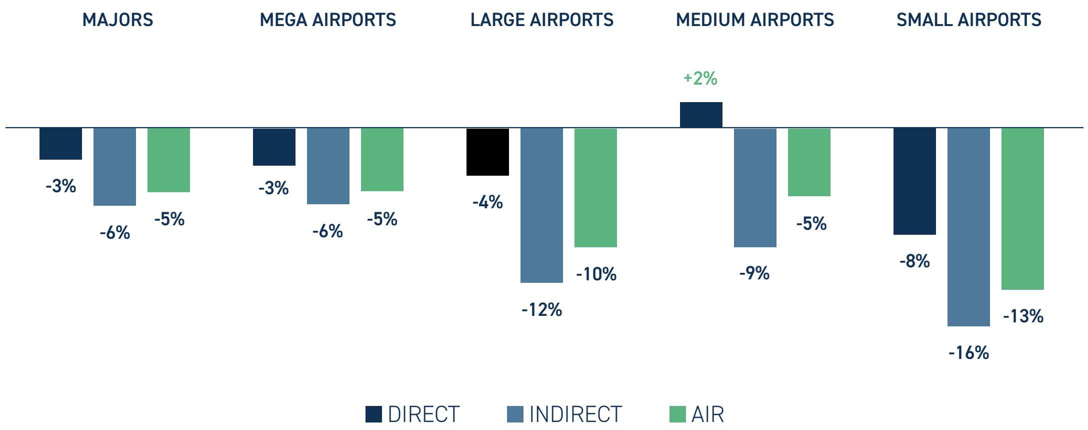
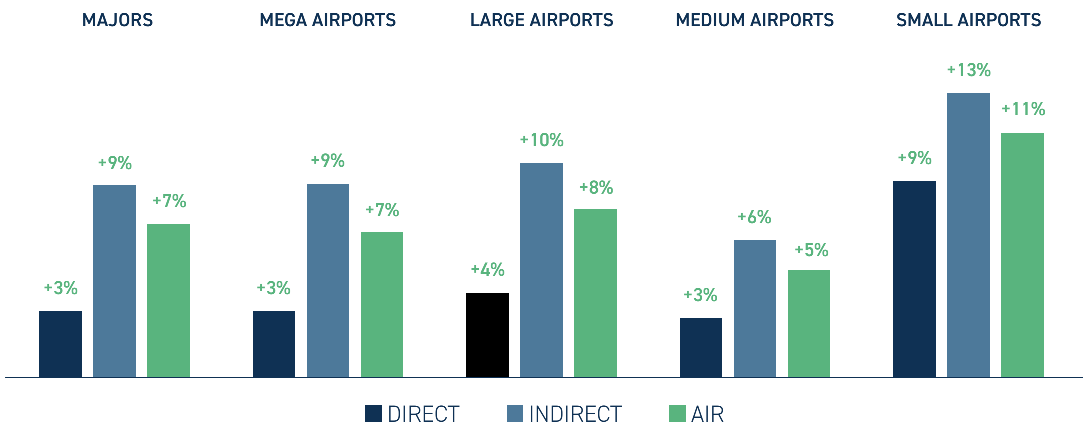
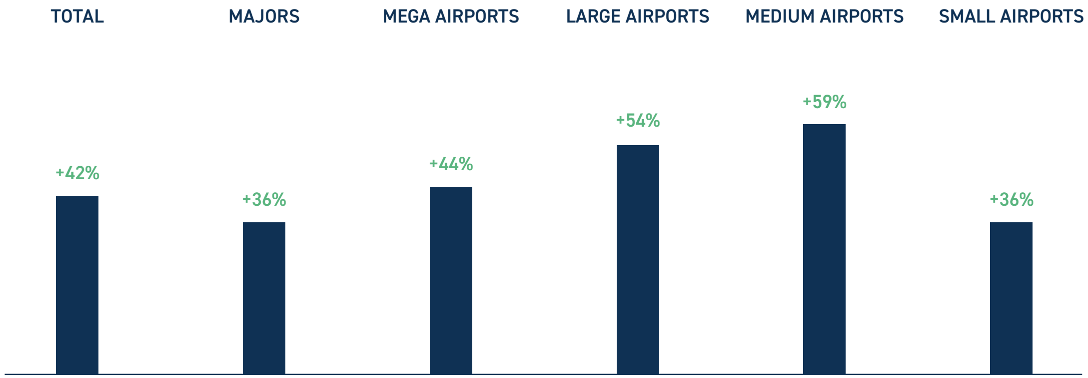


Chart 6:
DIRECT, INDIRECT & AIR CONNECTIVITY
(EUROPEAN AIRPORTS BY TRAFFIC CATEGORIES — 2025 VS. 2024)



The number of airports which have fully recovered their *direct connectivity* shows how different individual airport performance is from the average – with **Large** and **Medium airports** outperforming **Major** and **Mega airports** as well as **Small airports**.

Chart 7:
% OF EUROPEAN AIRPORTS WITH FULLY RECOVERED DIRECT CONNECTIVITY IN 2025 (COMPARED TO 2019)



2.5. TOP AIR CONNECTIVITY PERFORMERS PER AIRPORT INDUSTRY SEGMENT

Chart 8.1: **MAJOR AIRPORTS (OVER 40 MILLION PASSENGERS)**

RANK 2025	CODE	CITY	RANK 2019	VS. 2019	VS. 2024
1	LHR	London	1	-8%	+5%
2	CDG	Paris	2	-14%	+3%
3	FRA	Frankfurt	3	-15%	+6%
4	AMS	Amsterdam	4	-10%	+10%
5	MAD	Madrid	6	-1%	+6%

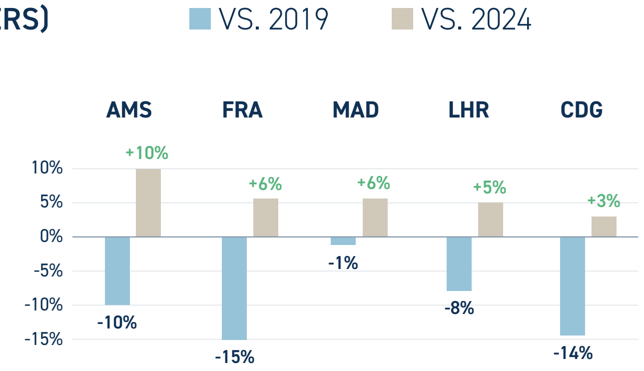


Chart 8.2: **MEGA AIRPORTS (25 TO 40 MILLION PASSENGERS)**

RANK 2025	CODE	CITY	RANK 2019	VS. 2019	VS. 2024
1	ZRH	Zurich	9	-7%	+9%
2	ATH	Athens	21	+33%	+13%
3	DUB	Dublin	14	+3%	+8%
4	LIS	Lisbon	15	+1%	+6%
5	CPH	Copenhagen	13	-9%	+3%

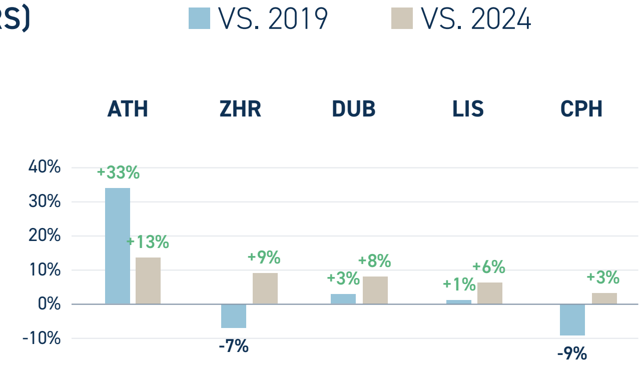


Chart 8.3: **LARGE AIRPORTS (10 TO 25 MILLION PASSENGERS)**

RANK 2025	CODE	CITY	RANK 2019	VS. 2019	VS. 2024
1	BRU	Brussels	16	-16%	+10%
2	ARN	Stockholm	17	-20%	+3%
3	HAM	Hamburg	24	-12%	+6%
4	GVA	Geneva	23	-15%	-1%
5	DUS	Düsseldorf	18	-30%	+6%

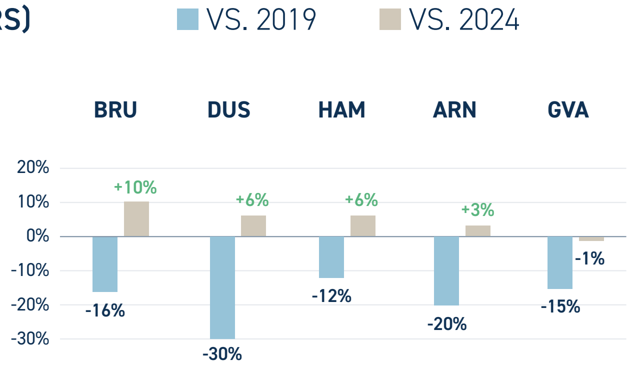


Chart 8.4: MEDIUM AIRPORTS (1 TO 10 MILLION PASSENGERS)

RANK 2025	CODE	CITY	RANK 2019	VS. 2019	VS. 2024
1	STR	Stuttgart	35	-33%	+2%
2	BEG	Belgrade	56	+7%	+9%
3	FLR	Florence	64	+12%	+15%
4	TLS	Toulouse	49	-18%	-6%
5	HAJ	Hanover	50	-21%	0%

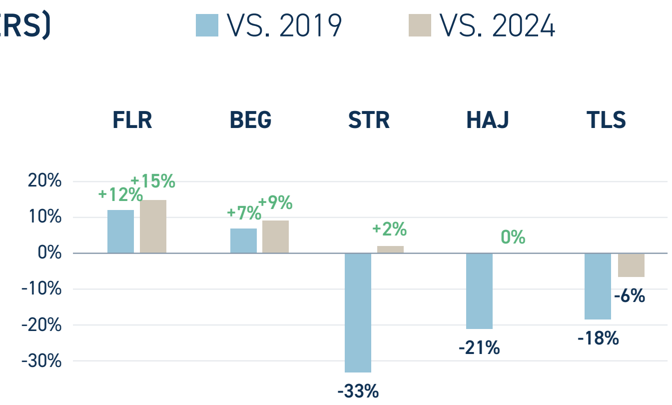
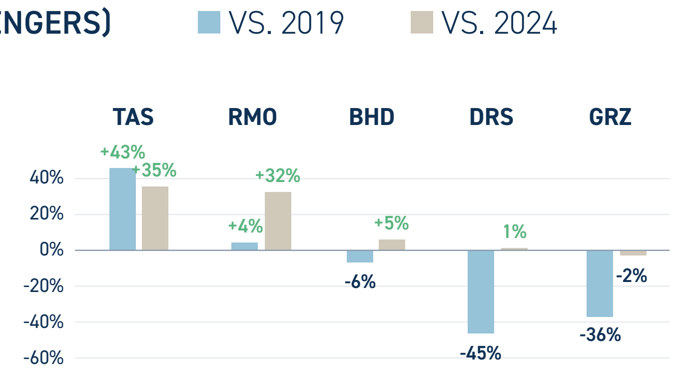
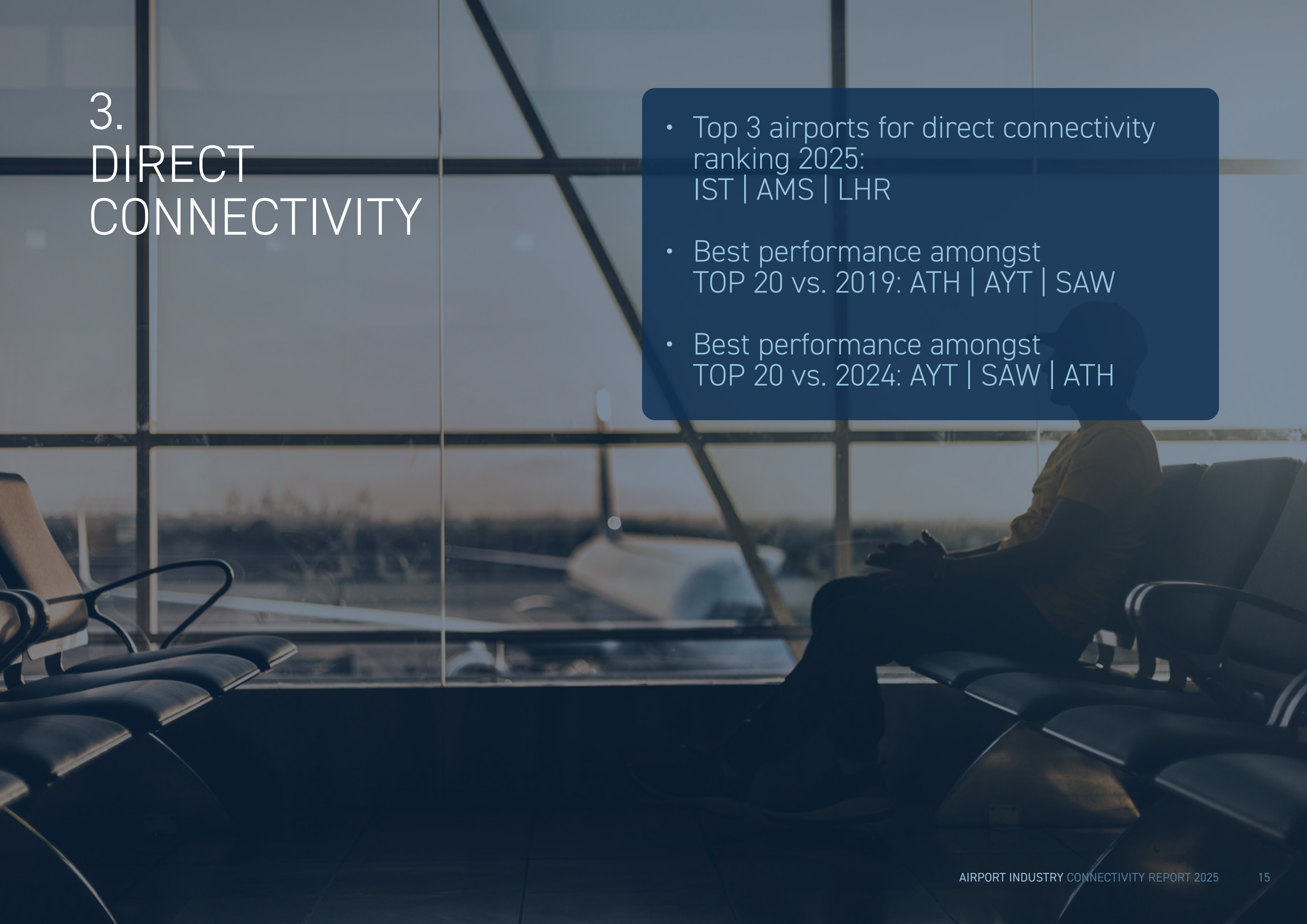


Chart 8.5: SMALL AIRPORTS (LESS THAN 1 MILLION PASSENGERS)

RANK 2025	CODE	CITY	RANK 2019	VS. 2019	VS. 2024
1	TAS	Tashkent	112	+43%	+35%
2	RMO	Chisinau	118	+4%	+32%
3	BHD	Belfast	117	-6%	+5%
4	GRZ	Graz	106	-36%	-2%
5	DRS	Dresden	104	-45%	+1%





3. DIRECT CONNECTIVITY

- Top 3 airports for direct connectivity ranking 2025:
  IST | AMS | LHR
- Best performance amongst TOP 20 vs. 2019: ATH | AYT | SAW
- Best performance amongst TOP 20 vs. 2024: AYT | SAW | ATH

3.1. TOP 20 AIRPORTS – DIRECT CONNECTIVITY RANKING

Istanbul (+13% vs. 2019) remains in the top position for *direct connectivity* – having moved from the 5th position pre-pandemic. **Istanbul** is in the lead for *direct connectivity* to the Middle East and comes in second place for *direct connectivity* to Asia-Pacific, while also being well placed for *direct connectivity* to Africa and Europe.

Amsterdam Schiphol (-4% vs. 2019) comes second, largely thanks to its excellent ***direct connectivity*** to Europe. This reflects the small size of its national market and the need to ensure critical mass for feeding its long-haul network.

London Heathrow (-2% vs. 2019) holds the third position. In addition to unmatched *direct connectivity* to North America, the British hub is also the airport in western Europe with the highest *direct connectivity* to the Middle East.

Frankfurt (-11% vs. 2019) has replaced Paris CDG (-7% vs. 2019) in the fourth position this year, partly thanks to a significant increase in its *direct connectivity* to Asia-Pacific **(+17% vs. 2024)**. The French hub, in fifth position overall, is noteworthy for its diverse network, holding the second position for *direct connectivity* to Africa, Latin America and Caribbean, and North America.

Along with **Istanbul**, the following airports have recovered and/or exceeded their pre-pandemic (2019) direct connectivity levels: **Antalya (+29%)**, **Athens (+24%)**, **Istanbul-Sabiha Gökçen (+14%)**, **Palma de Mallorca (+11%)**, **Dublin (+8%)**, **Lisbon (+4%)**, **Rome-Fiumicino (+3%)** and **Barcelona (+1%)**.

This clearly reflects the changed structure of the European aviation market – with both traffic and connectivity largely driven by leisure & VFR demand as well as the expansion of Low-Cost Carriers (LCCs) and Turkish air carriers.

Chart 9.1:

DIRECT CONNECTIVITY — TOP 20 AIRPORTS IN EUROPE IN 2025 (2025 VS. 2019 | RANKINGS 2025 & 2019)

2019	2025	CODE	
5	1	IST	+13%
2	2	AMS	-4%
4	3	LHR	-2%
1	4	FRA	-11%
3	5	CDG	-7%
7	6	MAD	-3%
9	7	BCN	+1%
6	8	MUC	-15%
10	9	FCO	+3%
20	10	ATH	+24%
15	11	PMI	+11%
11	12	LGW	-7%
22	13	SAW	+14%
13	14	CPH	-1%
12	15	VIE	-8%
21	16	DUB	+8%
16	17	ZRH	-2%
18	18	ORY	-4%
24	19	LIS	+4%
32	20	AYT	+29%

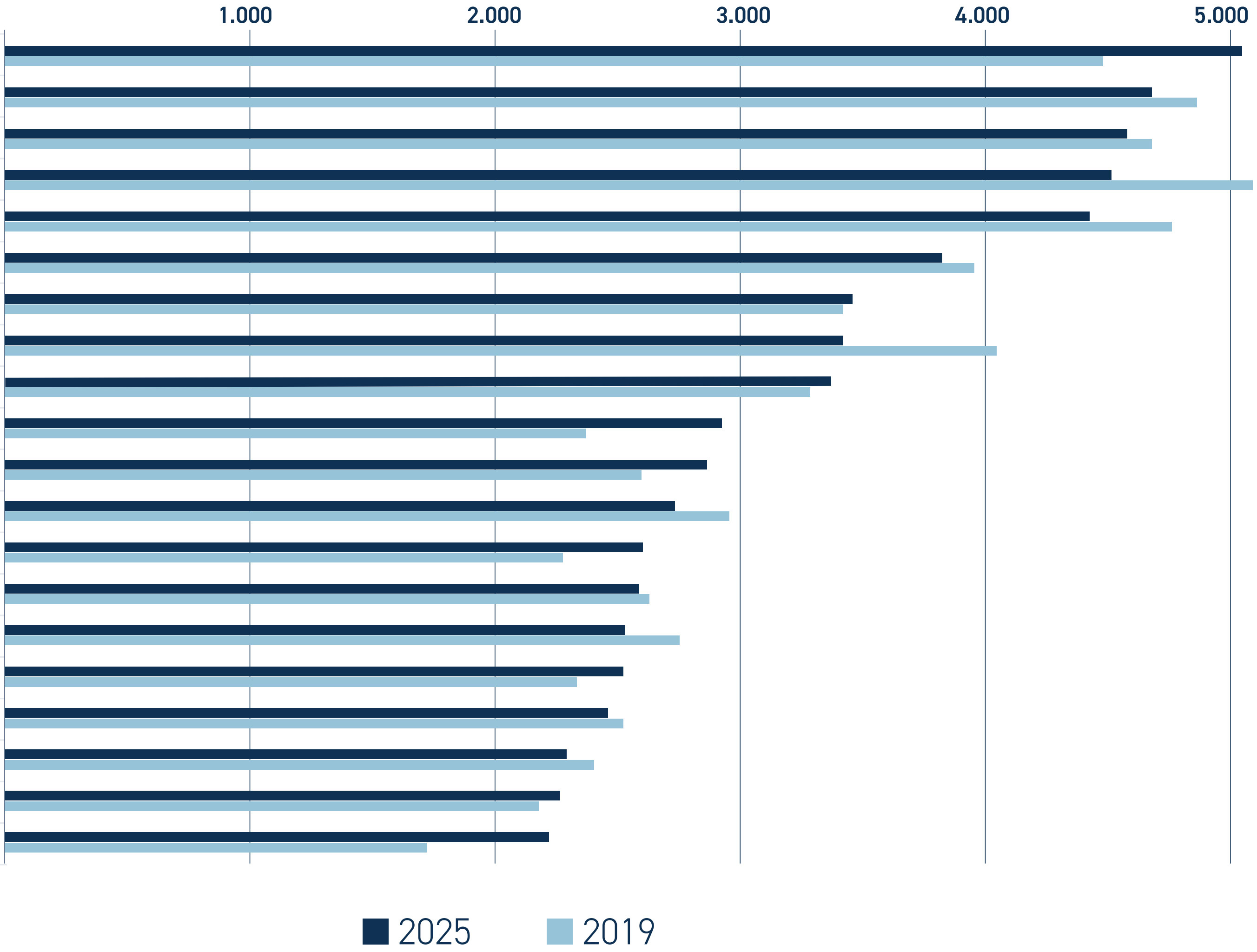
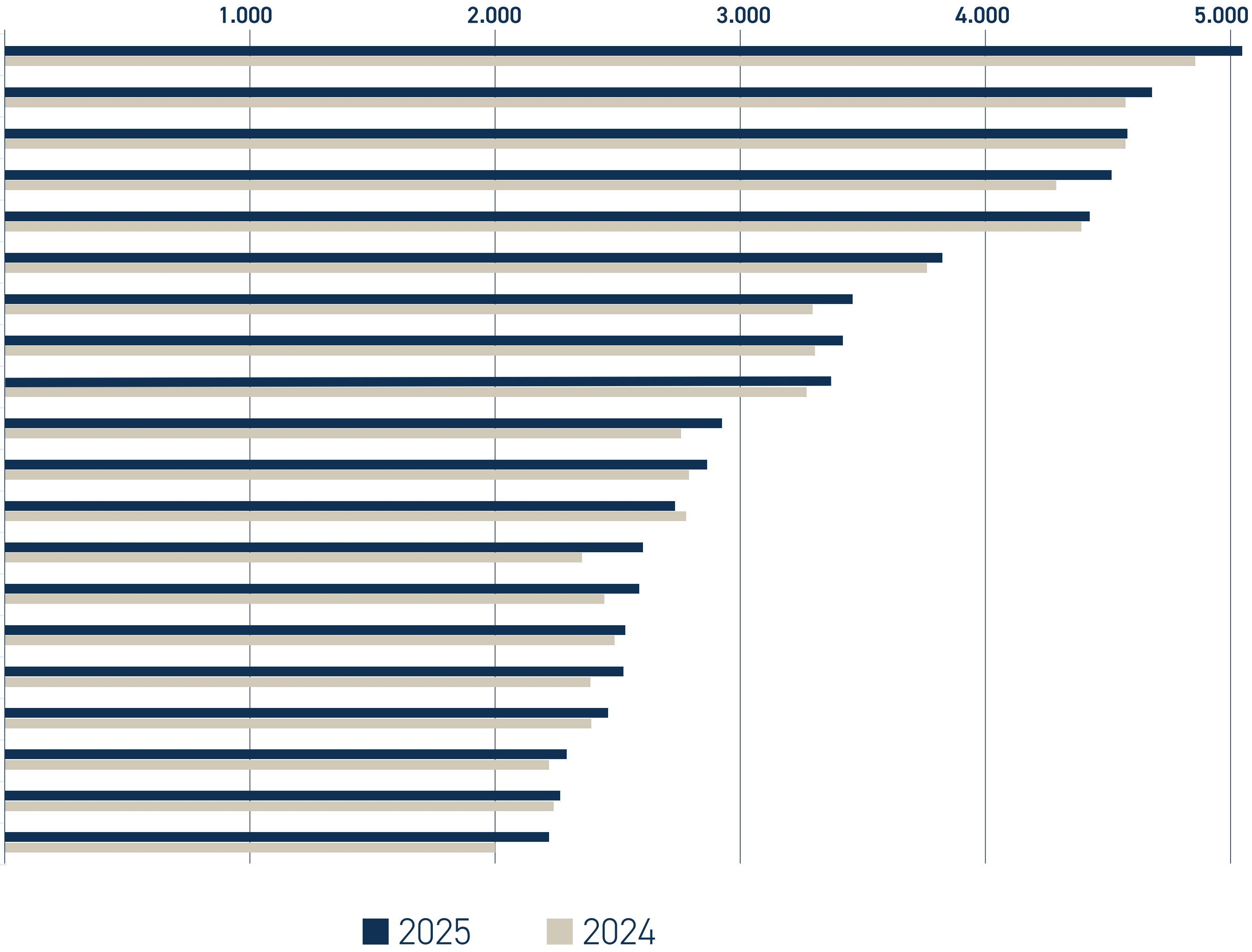


Chart 9.2:

DIRECT CONNECTIVITY — TOP 20 AIRPORTS IN EUROPE IN 2025 (2025 VS. 2024 | RANKINGS 2025 & 2024)

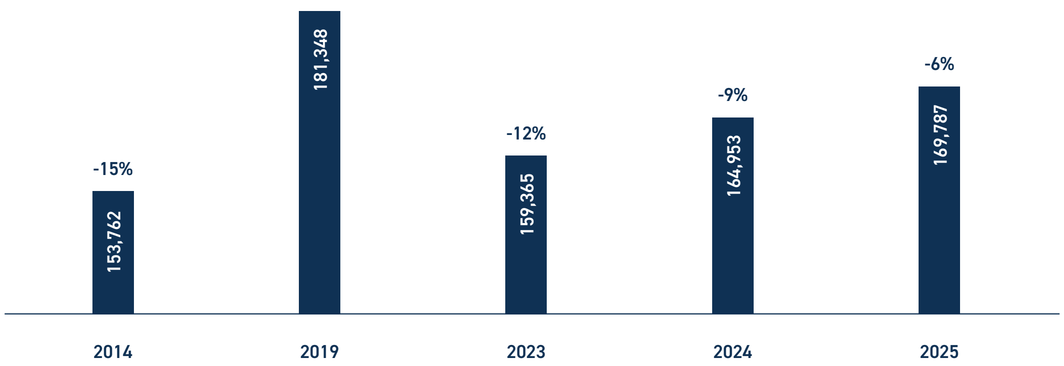
2024	2025	CODE	
1	1	IST	+4%
2	2	AMS	+2%
3	3	LHR	0%
5	4	FRA	+5%
4	5	CDG	+1%
6	6	MAD	+2%
8	7	BCN	+5%
7	8	MUC	+4%
9	9	FCO	+3%
12	10	ATH	+6%
10	11	PMI	+3%
11	12	LGW	-1%
17	13	SAW	+10%
14	14	CPH	+6%
13	15	VIE	+2%
16	16	DUB	+6%
15	17	ZRH	+3%
20	18	ORY	+3%
19	19	LIS	+1%
23	20	AYT	+11%



3.2 INTRA-EUROPEAN DIRECT CONNECTIVITY

Intra-European *direct connectivity* has recaptured another three percentage points since 2024 and now stands at **-6%** below pre-pandemic (2019) levels.

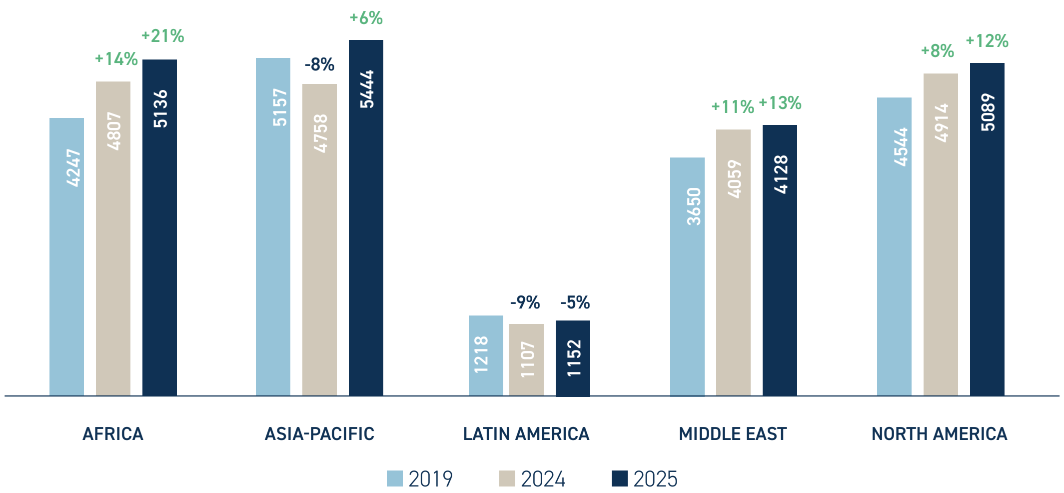
Chart 10:
DIRECT CONNECTIVITY FROM EUROPEAN AIRPORTS — INTRA-EUROPE VS. 2019



3.3 DIRECT CONNECTIVITY TO OTHER WORLD REGIONS

***Direct connectivity* to Africa (+21%)**, **Asia-Pacific (+6%)**, **Middle East (+13%) and North America (+12%)** all exceed pre-pandemic (2019) levels. The bounce back of *direct connectivity* to Asia-Pacific over the last year is worth noting. Only the **Latin America and Caribbean** region **(-5%)** still sees lower *direct connectivity* with Europe compared to 2019.

Chart 11:
DIRECT CONNECTIVITY FROM EUROPEAN AIRPORTS BY WORLD REGION | GROWTH RATES VS. 2019



The ***direct connectivity* of European hubs** to other regions reveals the specific market strength they have built over the past year.

Chart 12.1:
TOP 5 AIRPORTS BY DIRECT CONNECTIVITY TO AFRICA IN 2025 & % CHANGE VS. 2024

Chart 12.2:
TOP 5 AIRPORTS BY DIRECT CONNECTIVITY TO ASIA-PACIFIC IN 2025 & % CHANGE VS. 2024

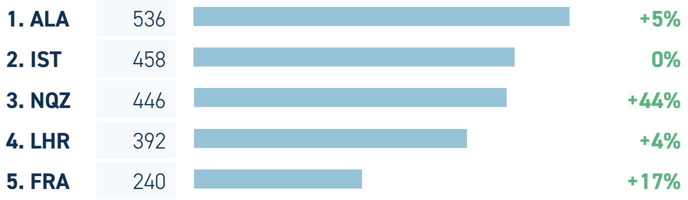


Chart 12.3:
TOP 5 AIRPORTS BY DIRECT CONNECTIVITY TO EUROPE IN 2025 & % CHANGE VS. 2024

Chart 12.4:
TOP 5 AIRPORTS BY DIRECT CONNECTIVITY TO LATIN AMERICA & CARIBBEAN IN 2025 & % CHANGE VS. 2024

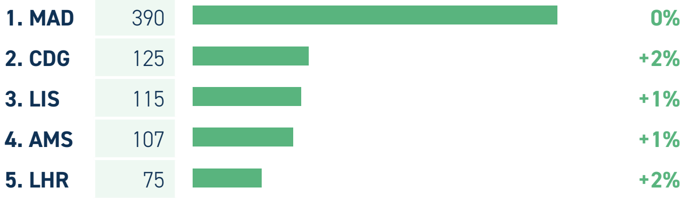


Chart 12.5:
TOP 5 AIRPORTS BY DIRECT CONNECTIVITY TO MIDDLE EAST IN 2025 & % CHANGE VS. 2024

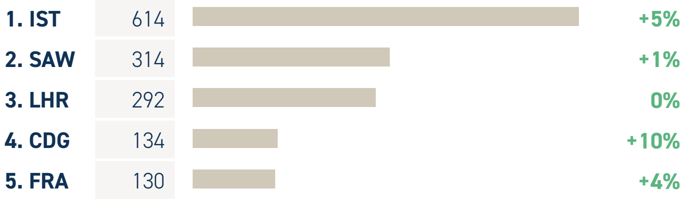


Chart 12.6:
TOP 5 AIRPORTS BY DIRECT CONNECTIVITY TO NORTH AMERICA IN 2025 & % CHANGE VS. 2024

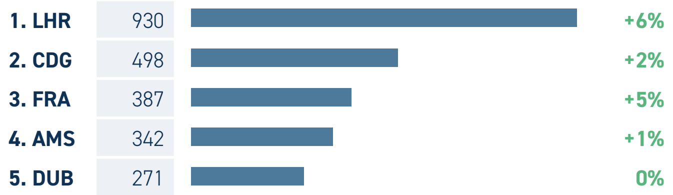
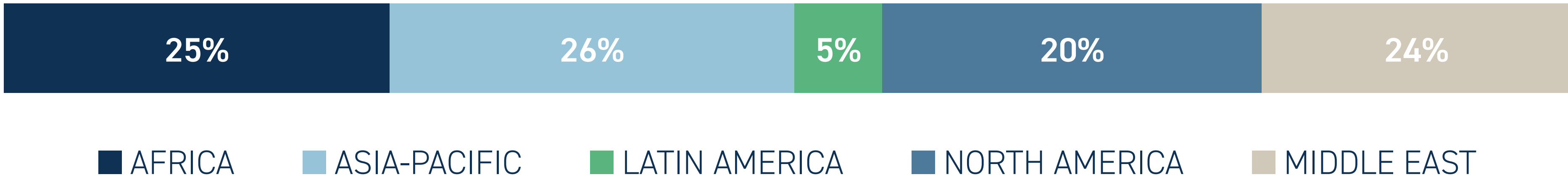
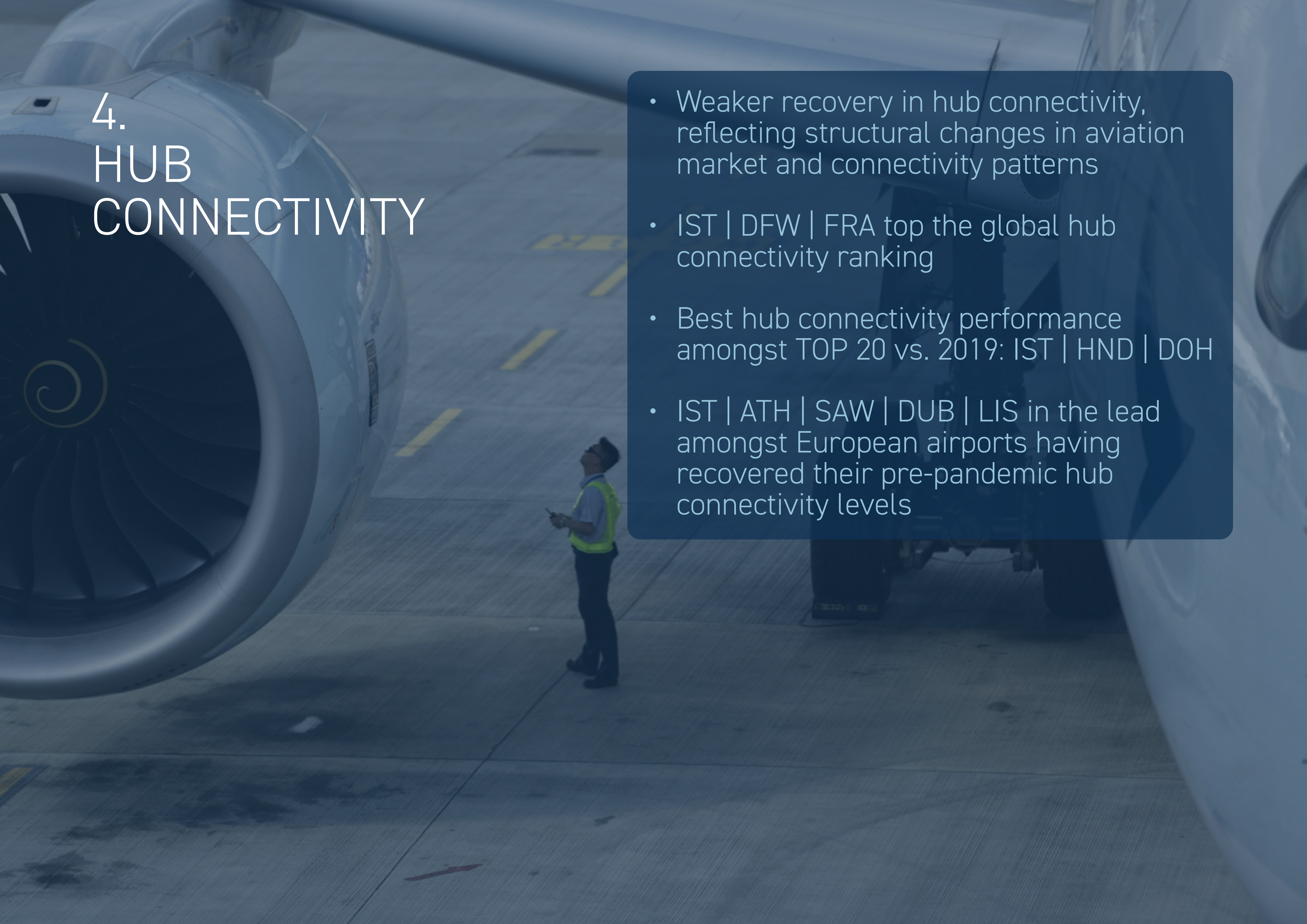


Chart 12.7:

DIRECT CONNECTIVITY SHARE OF EACH DESTINATION REGION (2025)





4. HUB CONNECTIVITY

- Weaker recovery in hub connectivity, reflecting structural changes in aviation market and connectivity patterns
- IST | DFW | FRA top the global hub connectivity ranking
- Best hub connectivity performance amongst TOP 20 vs. 2019: IST | HND | DOH
- IST | ATH | SAW | DUB | LIS in the lead amongst European airports having recovered their pre-pandemic hub connectivity levels

4.1. STRUCTURALLY LOWER HUB CONNECTIVITY

Hub connectivity is where we see the full value of air transport networks. For an airport that has a wave of 10 flights leaving at 10:00 am, one additional flight arriving at 9:00 am increases its *hub connectivity* by 10, reflective of the onward connecting options for passengers arriving on that additional flight.

***Hub connectivity* remains -12% below its pre-pandemic (2019) level this year and thus keeps significantly underperforming against *direct connectivity* (-5%).** Although the gap has narrowed over the past 4 years, this has become a consistent pattern which reflects structural changes in the aviation market – in particular the relative retrenchment of FSCs and expansion of Ultra-LCCs, who operate point-to-point services and favour bypassing hubs altogether.

While **EU+ hubs** have especially suffered from the closure of Russian airspace to European airlines following Russia's invasion of Ukraine, the opposite has been true for **other European hubs**, which have often taken over some transit passenger traffic while also benefitting from dynamic demand growth.

Chart 13:
DIRECT & HUB CONNECTIVITY FROM EUROPEAN AIRPORTS (VS. 2019)

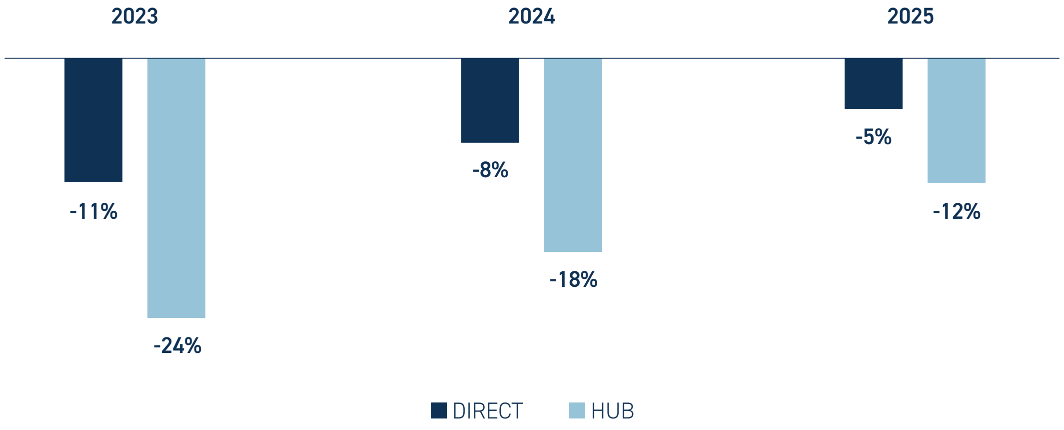
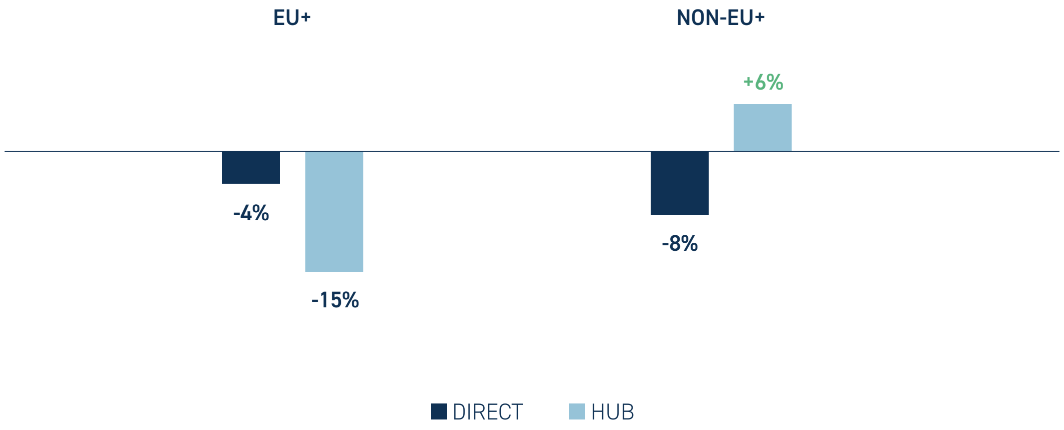


Chart 14:
DIRECT & HUB CONNECTIVITY FROM EU+ & NON-EU+ AIRPORTS (2025 VS. 2019)



4.2. GLOBAL HUB CONNECTIVITY PERFORMANCE

Istanbul has replaced Frankfurt as the top airport globally for *hub connectivity* this year – having advanced from 6th position in 2019 and 3rd position last year. Istanbul's ***hub connectivity*** has increased by an impressive **+59%** since 2019 – a reflection of the impressive expansion of its hub-based carrier (Turkish Airlines), its geographical strength at the crossroads of Europe, Africa and Asia, combined with ample available capacity and Türkiye's generally supportive aviation policy.

Frankfurt has come down to the 3rd position behind Dallas Fort Worth, with its ***hub connectivity*** remaining **-21%** below its 2019 levels.

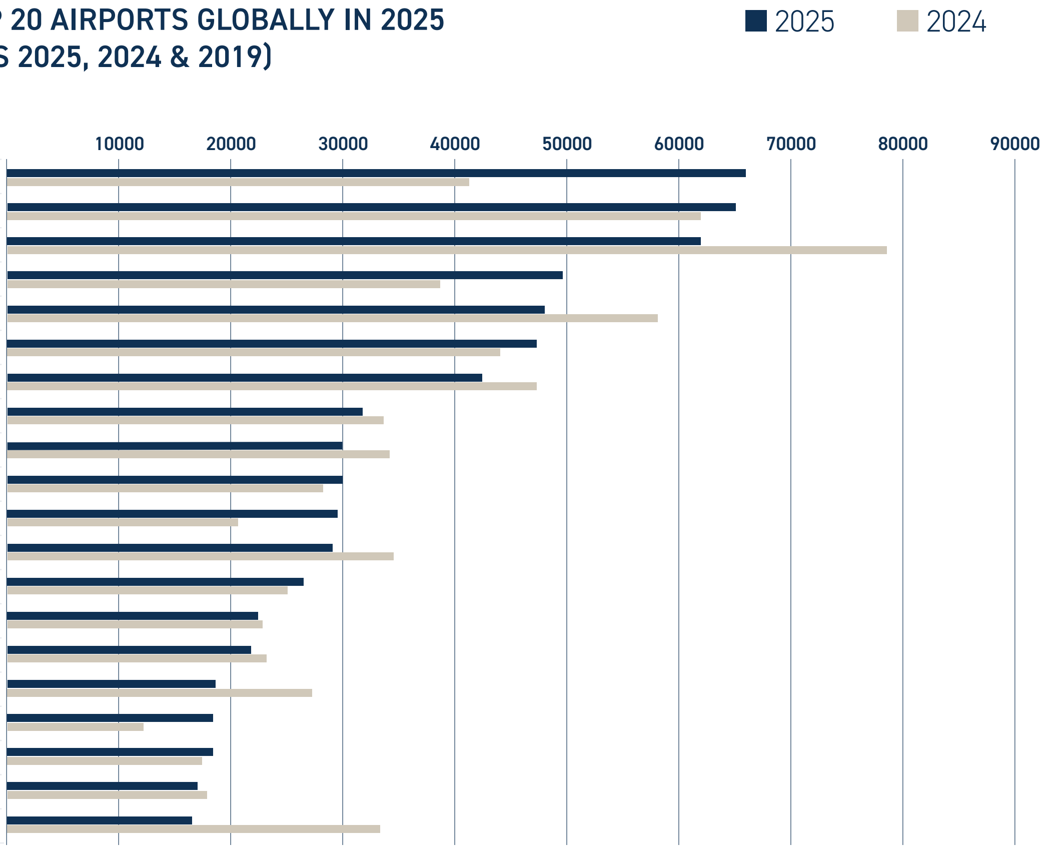
8 European airports are amongst the top 20 global airports for *hub connectivity* – along with 8 from North America and 4 from Asia-Pacific and the Middle East. Apart from Istanbul, the largest gains in ***hub connectivity*** when compared to pre-pandemic (2019) levels come from **Tokyo Haneda (+51%)** and **Doha (+43%)**.

Conversely, ***the hub connectivity* of all major Western European hubs remains below 2019 levels** – a symptom not just of their home-based carriers' retrenchment but also of weaker macroeconomic conditions, competitiveness challenges, and unsupportive aviation policies.

Chart 15:

HUB CONNECTIVITY — TOP 20 AIRPORTS GLOBALLY IN 2025 (2025 VS. 2024 | RANKINGS 2025, 2024 & 2019)

2019	2024	2025	CODE	
6	3	**1**	IST	+59%
2	2	**2**	DFW	+5%
1	1	**3**	FRA	-21%
7	4	**4**	DEN	+28%
3	5	**5**	AMS	-17%
5	7	**6**	ATL	+7%
4	6	**7**	CDG	-10%
10	8	**8**	LHR	-5%
8	10	**9**	MUC	-12%
12	11	**10**	DXB	+6%
17	9	**11**	DOH	+43%
9	12	**12**	ORD	-16%
14	14	**13**	CLT	+6%
16	15	**14**	MAD	-2%
15	16	**15**	IAH	-6%
13	13	**16**	EWR	-31%
27	17	**17**	HND	+51%
20	19	**18**	SIN	+6%
18	18	**19**	ZRH	-5%
11	20	**20**	YYZ	-50%



4.3. EUROPEAN HUB CONNECTIVITY PERFORMANCE

Zooming in on the European region's top 20 hubs, the contraction in *hub connectivity* at the major hubs since the pandemic (with the exception of Istanbul) contrasts with the gains achieved by selected smaller hubs since the pandemic (vs. 2019): **Athens (+92%)**, **Istanbul Sabiha Gökçen (+75%)**, **Dublin (+30%)**, **Lisbon (+8%)**, **Barcelona (+5%)**, **Copenhagen (+7%)** and **Keflavik (+6%)**. Underlying factors include their reliance on leisure & VFR traffic and the strength of the transatlantic market.

Apart from the Major hubs, **Helsinki (-49%)**, **Brussels (-37%)**, **Vienna (-32%)**, **Rome Fiumicino** and **Warsaw (both at -26%)** have also seen significant losses in *hub connectivity* post-pandemic – reflecting geopolitical impacts and hub carrier retrenchment or replacement in the case of the Italian hub.

Chart 16.1:

HUB CONNECTIVITY - TOP 20 AIRPORTS EUROPE IN 2025 (2025 VS. 2019 | RANKINGS 2025 & 2019)

2019	2025	CODE	
4	1	IST	+59%
1	2	FRA	-21%
2	3	AMS	-17%
3	4	CDG	-10%
6	5	LHR	-5%
5	6	MUC	-12%
8	7	MAD	-2%
9	8	ZRH	-5%
11	9	FCO	-26%
10	10	VIE	-32%
13	11	LIS	+8%
22	12	ATH	+92%
21	13	SAW	+75%
16	14	CPH	+7%
12	15	HEL	-49%
17	16	DUB	+30%
15	17	WAW	-26%
18	18	BCN	+5%
14	19	BRU	-37%
24	20	KEF	+6%

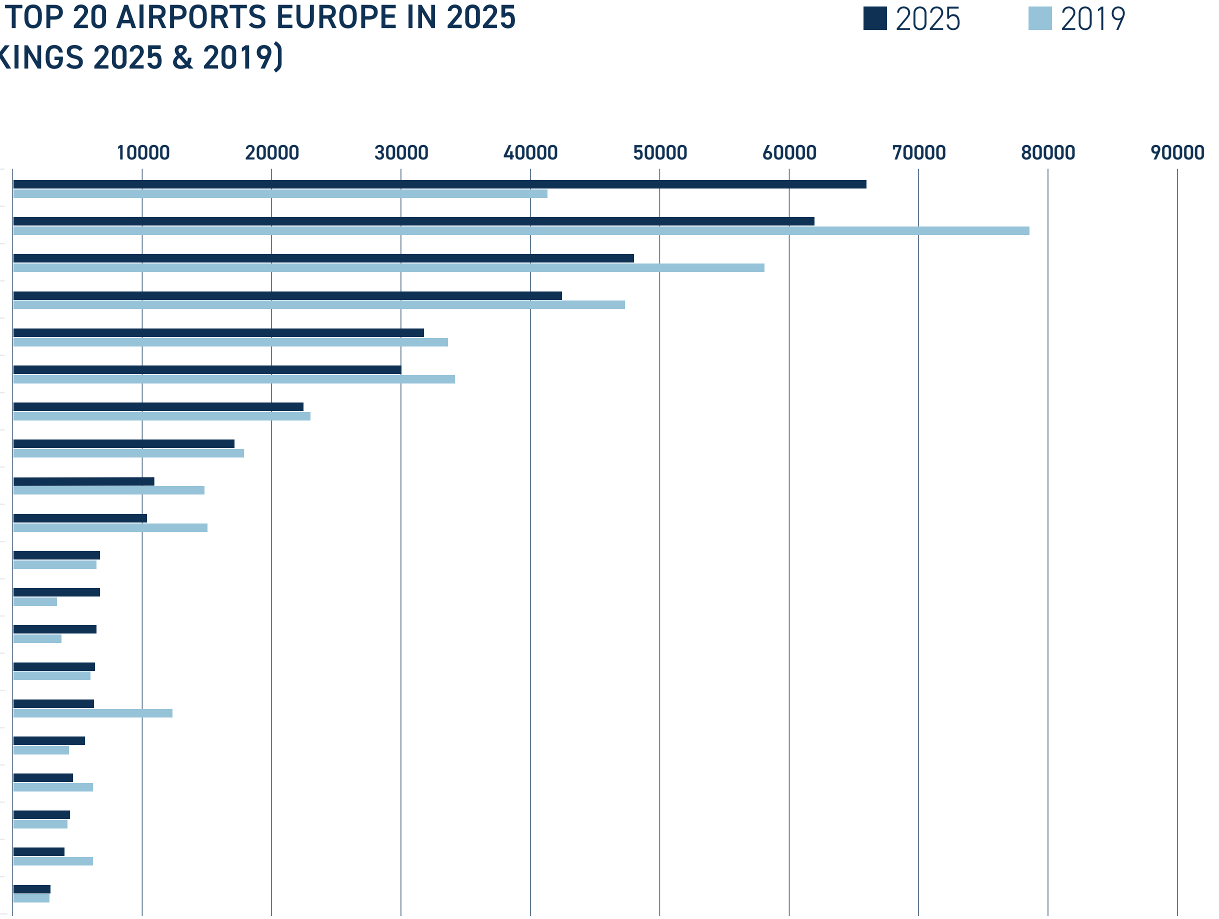
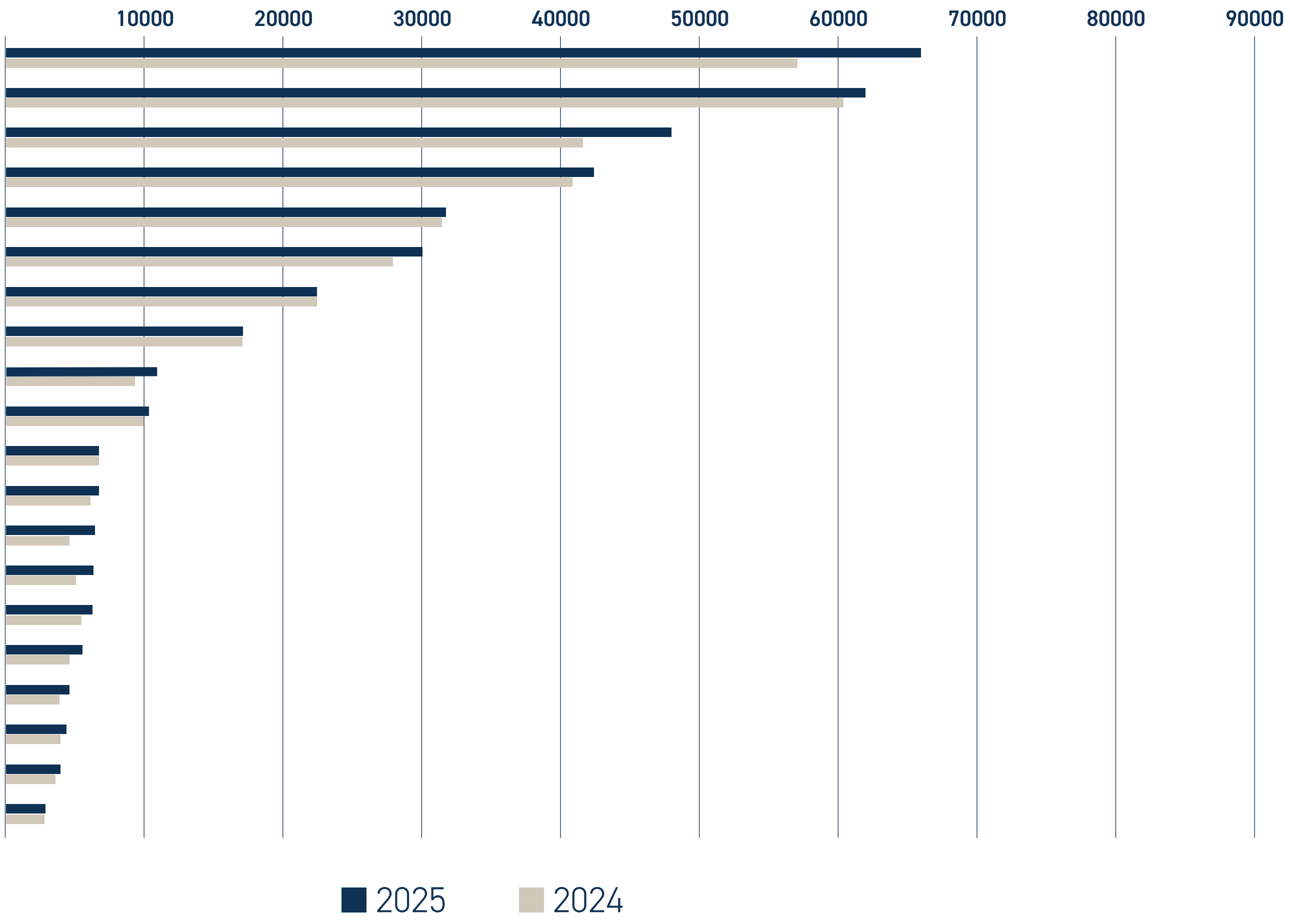


Chart 16.2:

HUB CONNECTIVITY - TOP 20 AIRPORTS EUROPE IN 2025 (2025 VS. 2024 | RANKINGS 2025 & 2024)

2024	2025	CODE	
2	1	IST	+16%
1	2	FRA	+3%
3	3	AMS	+16%
4	4	CDG	+4%
5	5	LHR	+1%
6	6	MUC	+8%
7	7	MAD	0%
8	8	ZRH	0%
10	9	FCO	+18%
9	10	VIE	+4%
11	11	LIS	0%
13	12	ATH	+11%
16	13	SAW	+41%
15	14	CPH	+26%
14	15	HEL	+13%
17	16	DUB	+22%
19	17	WAW	+18%
18	18	BCN	+12%
20	19	BRU	+8%
21	20	KEF	+2%



The top 20 list of European hubs reveals clear clusters, with 5 major hubs, a group of secondary hubs, and then niche hubs, based on their hub-based carriers, geographic markets, and underlying demand.

Chart 17.1:

HUB CONNECTIVITY — MAJOR HUBS (2025 VS. 2019)

CODE	2025 VS. 2019	2025 VS. 2024	2025 HUB CONNECTIVITY SCORE
IST	+59%	+16%	66021
FRA	-21%	+3%	61977
AMS	-17%	+16%	48119
CDG	-10%	+4%	42547
LHR	-5%	+1%	31968
MUC	-12%	+8%	30068

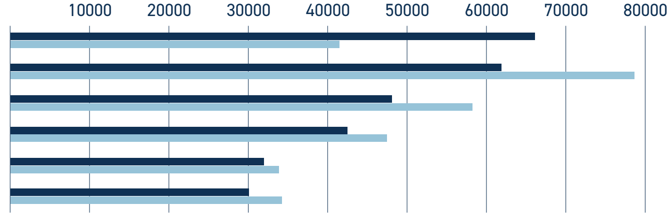


Chart 17.2:

HUB CONNECTIVITY — SECONDARY HUBS | 2025 VS. 2019

CODE	2025 VS. 2019	2025 VS. 2024	2025 HUB CONNECTIVITY SCORE
MAD	-2%	0%	22501
ZRH	-5%	0%	17177
FCO	-26%	+18%	10957
VIE	-32%	+4%	10303

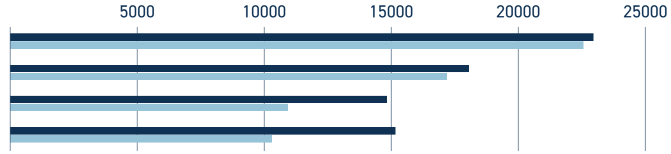
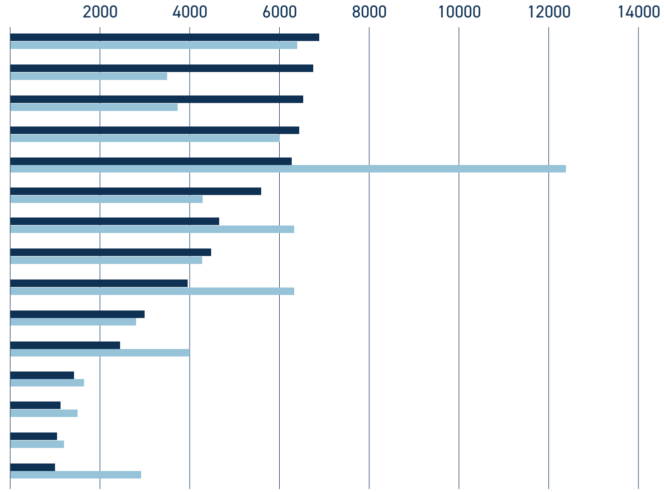


Chart 17.3:

HUB CONNECTIVITY — NICHE & SMALLER HUBS | 2025 VS. 2019

CODE	2025 VS. 2019	2025 VS. 2024	2025 HUB CONNECTIVITY SCORE
LIS	+8%	0%	6878
ATH	+92%	+11%	6754
SAW	+75%	+41%	6525
CPH	+7%	+26%	6444
HEL	-49%	+13%	6269
DUB	+30%	+22%	5596
WAW	-26%	+18%	4656
BCN	+5%	+12%	4473
BRU	-37%	+8%	3967
KEF	+6%	+2%	2974
OSL	-39%	-16%	2445
STN	-13%	-8%	1426
LGW	-23%	-6%	1147
GVA	-14%	-4%	1039
ARN	-65%	-35%	1018

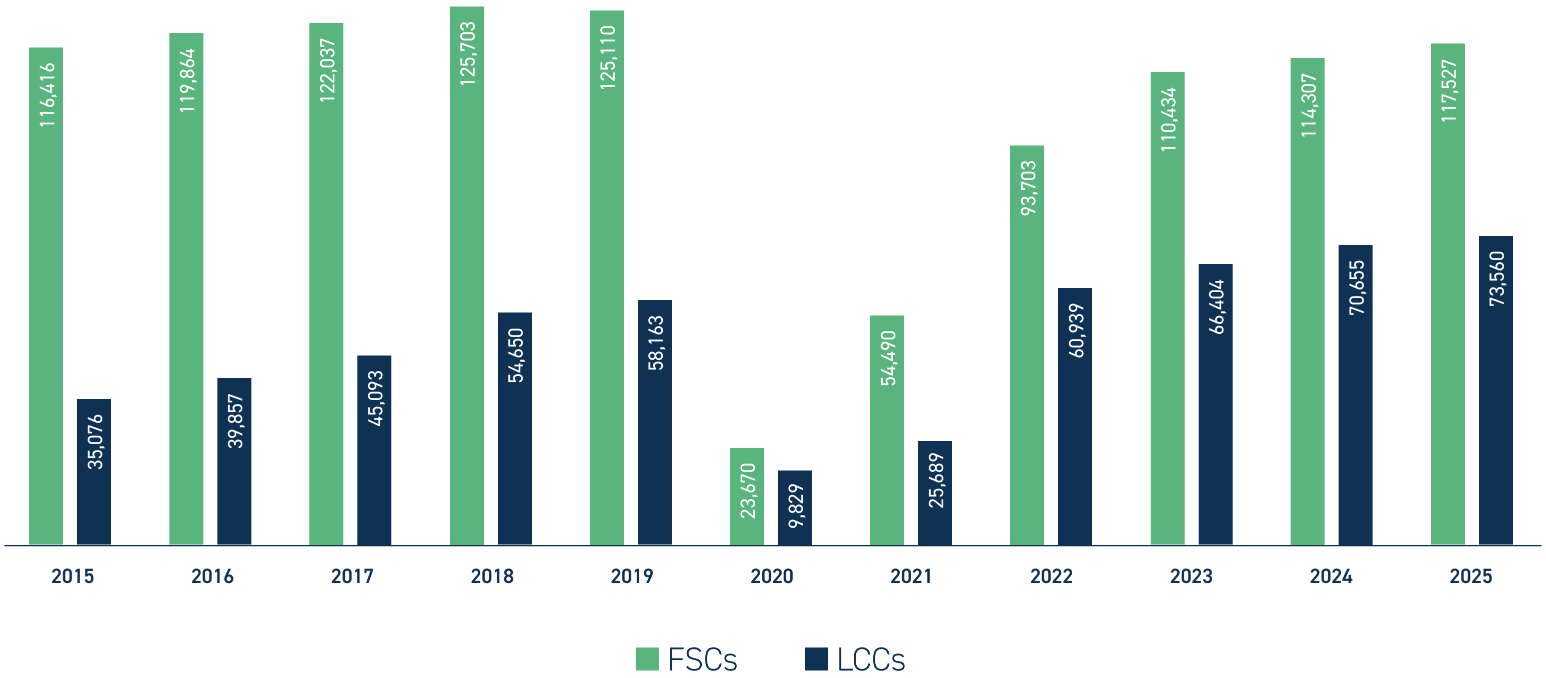


4.4. CONNECTIVITY & AIRLINE BUSINESS MODELS

4.4.1. LOW-COST CARRIERS DRIVING INTRA-EUROPEAN DIRECT CONNECTIVITY GROWTH

Low-Cost Carriers (LCCs: +19%) have driven the recovery in *direct connectivity* since the pandemic, while Full-Service Carriers (FSCs) have seen their *direct connectivity* decrease by **-15%**. However, their performance has been similar over the past year, with LCCs seeing a +4% increase and FSCs a **+3%** increase in their *direct connectivity*.

Chart 18:
INTRA-EUROPEAN DIRECT CONNECTIVITY FROM 2015 TO 2025 - LCCS & FSCS



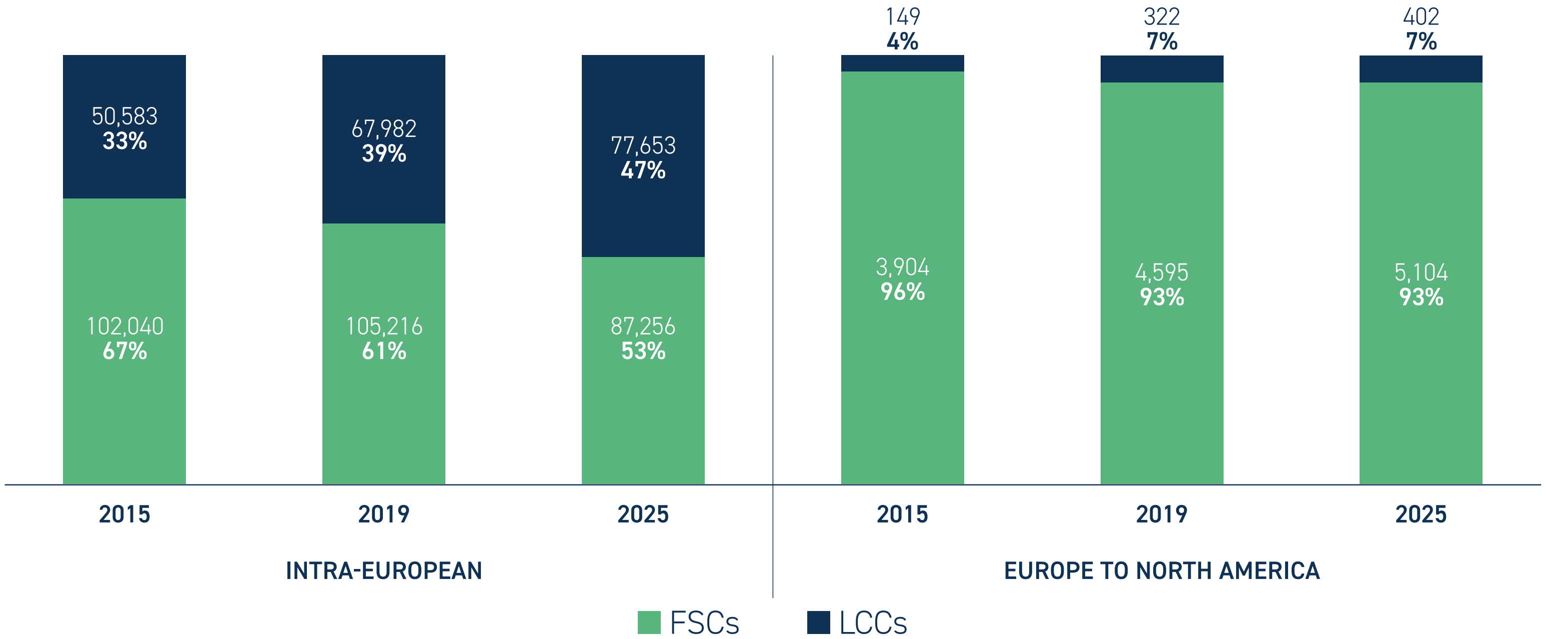
LCCs account for 47% of intra-European *direct connectivity* – up from 39% pre-pandemic (2019) and 33% ten years ago (2015). This reflects once more the changed structure of the European aviation market on the back of the post-pandemic growth in leisure, "bleisure" (mixed business/leisure) and VFR (Visit Friends & Relatives) demand, with LCCs having expanded significantly in terms of intra-European capacity and route network.

Conversely, **FSCs' share of direct connectivity to North America remains largely unchallenged at 93%** – a market share that remains the same as before the Covid-19 pandemic. This shows the LCC model is not making significant inroads into the transatlantic market.

Overall, these developments all point to airports facing increasing competitive pressures to bid for – and win – airlines' growth and new routes.

Chart 19:

SHARE & LEVEL OF LCCs AND FSCs DIRECT CONNECTIVITY ON INTRA-EUROPEAN AND NORTH AMERICAN ROUTES IN 2015, 2019 AND 2025



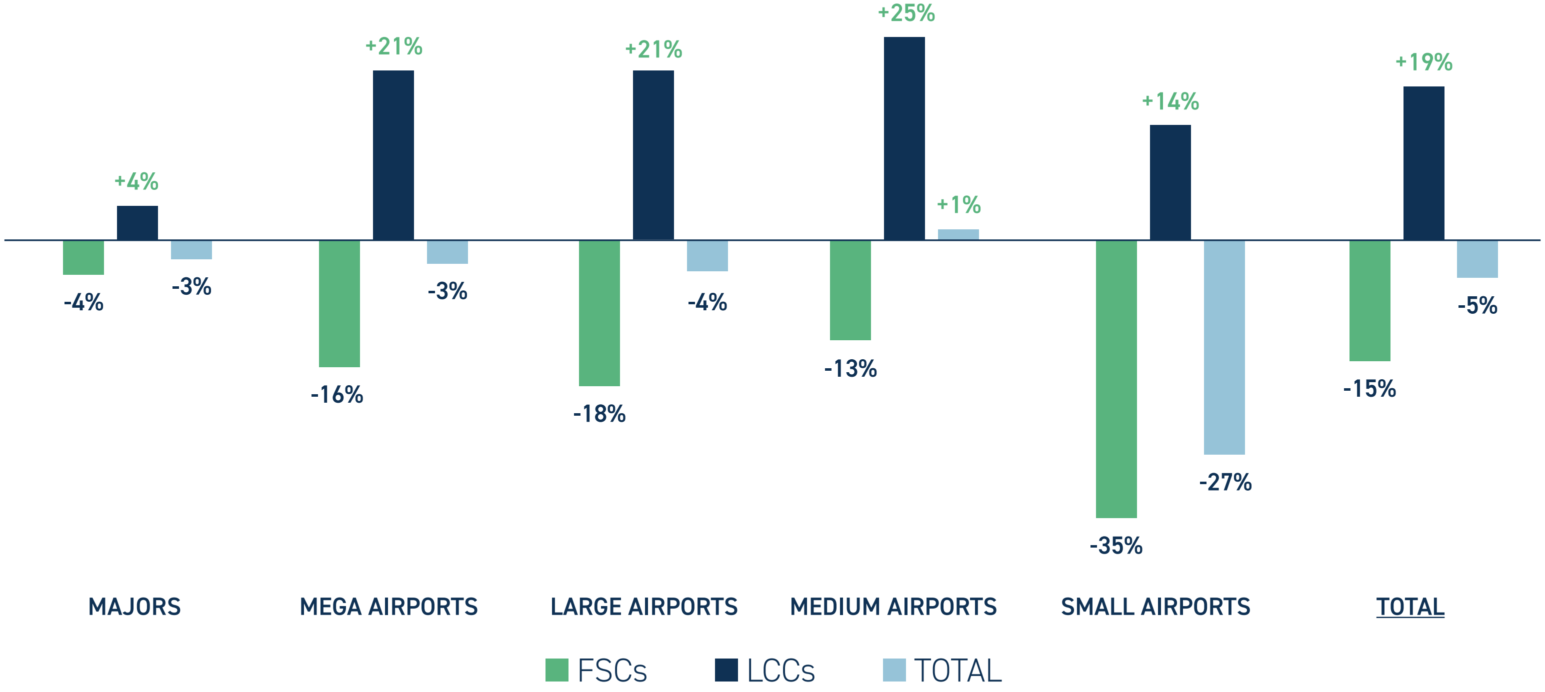
This chart is based on a different data source than the rest of the Connectivity Report and may have minor immaterial differences in exact numbers.

4.4.2 LCC & FSC growth varies across different airport size groups

When compared to pre-pandemic (2019) levels, **LCCs have expanded their *air connectivity* across all segments of the airport industry** – in particular at Mega airports (+21%), Large airports (+21%) and Medium airports (+25%).

Meanwhile, **the *air connectivity* offered by FSCs has decreased across all segments** – and is particularly severe at Small airports (-35%).

Chart 20:
DIRECT CONNECTIVITY AT EUROPEAN AIRPORTS — LCCs & FSCs LEVELS (2025 VS. 2019)



4.5. COUNTRY RANKINGS – DIRECT, INDIRECT AND AIR CONNECTIVITY

Chart 21.1:

RANKING OF EUROPEAN COUNTRIES BASED ON DIRECT CONNECTIVITY LEVELS (2025, 2024 AND 2019)

EU+

	Country	2025	2024	2019
1	Spain	**22198**	**21431**	**20413**
2	United Kingdom	**21182**	**20814**	**23479**
3	Germany	**16499**	**16165**	**20185**
4	Italy	**16369**	**15875**	**15391**
5	France	**13551**	**13663**	**15368**
6	Greece	**8188**	**7742**	**6576**
7	Norway	**6257**	**6307**	**7249**
8	Portugal	**5452**	**5188**	**4706**
9	Netherlands	**5334**	**5221**	**5536**
10	Switzerland	**4434**	**4383**	**4681**
11	Poland	**4258**	**3894**	**3781**
12	Sweden	**3274**	**3508**	**4910**
13	Denmark	**3224**	**3242**	**3471**
14	Ireland	**3072**	**2894**	**2831**
15	Austria	**2857**	**2781**	**3178**
16	Belgium	**2510**	**2418**	**2643**
17	Romania	**1901**	**1689**	**1754**
18	Finland	**1821**	**1774**	**2463**
19	Croatia	**1627**	**1534**	**1409**
20	Czechia	**1498**	**1459**	**1572**
21	Cyprus	**1333**	**1127**	**1091**
22	Hungary	**1205**	**1059**	**1115**
23	Bulgaria	**862**	**790**	**978**
24	Iceland	**783**	**812**	**797**
25	Malta	**641**	**600**	**551**
26	Latvia	**572**	**598**	**847**
27	Luxembourg	**539**	**561**	**560**
28	Lithuania	**484**	**468**	**510**
29	Estonia	**371**	**389**	**389**
30	Slovakia	**258**	**226**	**236**
31	Slovenia	**162**	**143**	**248**

NON-EU+

	Country	2025	2024	2019
1	Türkiye	**14765**	**14096**	**13141**
2	Russian Federation	**13180**	**13268**	**17777**
3	Kazakhstan	**2013**	**1583**	**1601**
4	Israel	**1516**	**965**	**1607**
5	Serbia	**860**	**813**	**654**
6	Uzbekistan	**760**	**670**	**443**
7	Albania	**742**	**729**	**255**
8	Georgia	**642**	**492**	**501**
9	Azerbaijan	**516**	**591**	**422**
10	Greenland	**434**	**505**	**519**
11	Armenia	**409**	**354**	**229**
12	Moldova Republic of	**376**	**253**	**280**
13	Montenegro	**306**	**291**	**294**
14	Kosovo	**262**	**177**	**133**
15	Bosnia and Herzegovina	**261**	**235**	**172**
16	Kyrgyzstan	**249**	**254**	**248**
17	North Macedonia	**247**	**237**	**186**
18	Belarus	**232**	**46**	**508**
19	Tajikistan	**192**	**229**	**129**
20	Turkmenistan	**66**	**56**	**74**
	Ukraine	**0**	**0**	**2071**

Chart 21.2:

RANKING OF EUROPEAN COUNTRIES BASED ON DIRECT CONNECTIVITY CHANGE (2025 VS. 2019 | PERFORMANCE VS. 2024)

EU+

	Country	2025 VS. 2019	2025 VS. 2024
1	Greece	+25%	+6%
2	Cyprus	+22%	+18%
3	Malta	+16%	+7%
4	Portugal	+16%	+5%
5	Croatia	+15%	+6%
6	Poland	+13%	+9%
7	Slovakia	+9%	+14%
8	Spain	+9%	+4%
9	Ireland	+9%	+6%
10	Romania	+8%	+13%
11	Hungary	+8%	+14%
12	Italy	+6%	+3%
13	Iceland	-2%	-4%
14	Netherlands	-4%	+2%
15	Luxembourg	-4%	-4%
16	Estonia	-5%	-5%

	Country	2025 VS. 2019	2025 VS. 2024
17	Czechia	-5%	+3%
18	Belgium	-5%	+4%
19	Lithuania	-5%	+3%
20	Switzerland	-5%	+1%
21	Denmark	-7%	-1%
22	United Kingdom	-10%	+2%
23	Austria	-10%	+3%
24	France	-12%	-1%
25	Bulgaria	-12%	+9%
26	Norway	-14%	-1%
27	Germany	-18%	+2%
28	Finland	-26%	+3%
29	Latvia	-32%	-4%
30	Sweden	-33%	-7%
31	Slovenia	-35%	+13%

NON-EU+

	Country	2025 VS. 2019	2025 VS. 2024
1	Albania	+191%	+2%
2	Kosovo	+97%	+48%
3	Armenia	+79%	+16%
4	Uzbekistan	+72%	+13%
5	Bosnia and Herzegovina	+52%	+11%
6	Tajikistan	+49%	-16%
7	Moldova Republic of	+34%	+49%
8	North Macedonia	+33%	+4%
9	Serbia	+31%	+6%
10	Georgia	+28%	+30%
11	Kazakhstan	+26%	+27%
12	Azerbaijan	+22%	-13%
13	Türkiye	+12%	+5%
14	Montenegro	+4%	+5%
15	Kyrgyzstan	0%	-2%
16	Israel	-6%	+57%
17	Turkmenistan	-11%	+18%
18	Greenland	-16%	-14%
19	Russian Federation	-26%	-1%
20	Belarus	-54%	+404%
21	Ukraine	-100%	NA

Chart 22.1:

RANKING OF EUROPEAN COUNTRIES BASED ON INDIRECT CONNECTIVITY LEVELS (2025, 2024 AND 2019)

EU+

	Country	2025	2024	2019
1	Germany	43815	41239	55749
2	United Kingdom	41325	38421	43909
3	Italy	34237	30522	34789
4	Spain	32662	30702	32767
5	France	27646	27080	32336
6	Switzerland	13283	12516	15451
7	Greece	12408	10903	8666
8	Portugal	11098	10379	10277
9	Netherlands	10519	9249	11967
10	Poland	8644	7877	8971
11	Ireland	7690	7097	7608
12	Norway	7551	7466	8540
13	Denmark	7463	7302	8680
14	Austria	6796	5997	9008
15	Sweden	6605	6765	9887
16	Belgium	5573	4995	6464
17	Finland	4434	3851	6449
18	Croatia	3804	3387	3861
19	Czechia	3058	2775	4303
20	Romania	3030	2740	3252
21	Hungary	2622	2376	3347
22	Bulgaria	1820	1536	2059
23	Cyprus	1748	1600	1760
24	Luxembourg	1632	1532	1943
25	Iceland	1395	1475	1336
26	Estonia	1373	1330	1378
27	Latvia	1309	1139	1450
28	Lithuania	1202	1001	1142
29	Malta	1201	1063	1622
30	Slovenia	1044	834	1130
31	Slovakia	145	116	205

NON-EU+

	Country	2025	2024	2019
1	Türkiye	22826	20173	14414
2	Russia	9229	9047	21544
3	Israel	3922	3026	5290
4	Serbia	1764	1582	1774
5	Kazakhstan	1463	1260	1982
6	Uzbekistan	1426	964	822
7	Georgia	1298	1201	1183
8	Bosnia and Herzegovina	845	698	616
9	Azerbaijan	831	895	838
10	Albania	810	813	740
11	Armenia	715	573	595
12	Kyrgyzstan	667	615	634
13	Montenegro	574	517	644
14	Moldova	525	432	586
15	North Macedonia	438	354	400
16	Kosovo	418	382	538
17	Turkmenistan	363	272	280
18	Belarus	240	149	1040
19	Tajikistan	139	131	130
20	Ukraine	0	0	3596

Chart 22.2:

RANKING OF EUROPEAN COUNTRIES BASED ON INDIRECT CONNECTIVITY CHANGE (2025 VS. 2019 | PERFORMANCE VS. 2024)

EU+

	Country	2025 VS. 2019	2025 VS. 2024
1	Greece	+43%	+14%
2	Portugal	+8%	+7%
3	Lithuania	+5%	+20%
4	Iceland	+4%	-5%
5	Ireland Republic of	+1%	+8%
6	Spain	0%	+6%
7	Estonia	0%	+3%
8	Cyprus	-1%	+9%
9	Croatia	-1%	+12%
10	Italy	-2%	+12%
11	Poland	-4%	+10%
12	United Kingdom	-6%	+8%
13	Romania	-7%	+11%
14	Slovenia	-8%	+25%
15	Latvia	-10%	+15%
16	Norway	-12%	+1%

	Country	2025 VS. 2019	2025 VS. 2024
17	Bulgaria	-12%	+18%
18	Netherlands	-12%	+14%
19	Belgium	-14%	+12%
20	Denmark	-14%	+2%
21	Switzerland	-14%	+6%
22	France	-15%	+2%
23	Luxembourg	-16%	+7%
24	Germany	-21%	+6%
25	Hungary	-22%	+10%
26	Austria	-25%	+13%
27	Malta	-26%	+13%
28	Czechia	-29%	+10%
29	Slovakia	-29%	+25%
30	Finland	-31%	+15%
31	Sweden	-33%	-2%

NON-EU+

	Country	2025 VS. 2019	2025 VS. 2024
1	Greenland	+192%	-5%
2	Uzbekistan	+73%	+48%
3	Türkiye	+58%	+13%
4	Bosnia and Herzegovina	+37%	+21%
5	Turkmenistan	+30%	+33%
6	Armenia	+20%	+25%
7	Georgia	+10%	+8%
8	North Macedonia	+10%	+24%
9	Albania	+9%	0%
10	Tajikistan	+7%	+6%
11	Kyrgyzstan	+5%	+8%
12	Serbia	-1%	+12%
13	Azerbaijan	-1%	-7%
14	Moldova Republic of	-10%	+22%
15	Montenegro	-11%	+11%
16	Kosovo	-22%	+9%
17	Israel	-26%	+30%
18	Kazakhstan	-26%	+16%
19	Russian Federation	-57%	+2%
20	Belarus	-77%	+61%
21	Ukraine	-100%	NA

Chart 23.1:

RANKING OF EUROPEAN COUNTRIES BASED ON AIR CONNECTIVITY LEVELS (2025, 2024 AND 2019)

EU+

	Country	2025	2024	2019
1	United Kingdom	**62507**	**59235**	**67388**
2	Germany	**60314**	**57404**	**75934**
3	Spain	**54860**	**52133**	**53180**
4	Italy	**50606**	**46397**	**50180**
5	France	**41197**	**40743**	**47704**
6	Greece	**20596**	**18645**	**15242**
7	Switzerland	**17717**	**16899**	**20132**
8	Portugal	**16550**	**15567**	**14983**
9	Netherlands	**15853**	**14470**	**17503**
10	Norway	**13808**	**13773**	**15789**
11	Poland	**12902**	**11771**	**12752**
12	Ireland	**10762**	**9991**	**10439**
13	Denmark	**10687**	**10544**	**12151**
14	Sweden	**9879**	**10273**	**14797**
15	Austria	**9653**	**8778**	**12186**
16	Belgium	**8083**	**7413**	**9107**

	Country	2025	2024	2019
17	Finland	**6255**	**5625**	**8912**
18	Croatia	**5431**	**4921**	**5270**
19	Romania	**4931**	**4429**	**5006**
20	Czechia	**4556**	**4234**	**5875**
21	Hungary	**3827**	**3435**	**4462**
22	Cyprus	**3081**	**2727**	**2851**
23	Bulgaria	**2682**	**2326**	**3037**
24	Iceland	**2178**	**2287**	**2133**
25	Luxembourg	**2171**	**2093**	**2503**
26	Latvia	**1881**	**1737**	**2297**
27	Malta	**1842**	**1663**	**2173**
28	Estonia	**1744**	**1719**	**1767**
29	Lithuania	**1686**	**1469**	**1652**
30	Slovenia	**1206**	**977**	**1378**
31	Slovakia	**403**	**342**	**441**

NON-EU+

	Country	2025	2024	2019
1	Türkiye	**37591**	**34269**	**27555**
2	Russian Federation	**22409**	**22315**	**39321**
3	Israel	**5438**	**3991**	**6897**
4	Kazakhstan	**3476**	**2843**	**3583**
5	Serbia	**2624**	**2395**	**2428**
6	Uzbekistan	**2186**	**1634**	**1265**
7	Georgia	**1940**	**1693**	**1684**
8	Albania	**1552**	**1542**	**995**
9	Azerbaijan	**1347**	**1486**	**1260**
10	Armenia	**1124**	**927**	**824**
11	Bosnia and Herzegovina	**1106**	**933**	**788**
12	Kyrgyzstan	**916**	**869**	**882**
13	Moldova	**901**	**685**	**866**
14	Montenegro	**880**	**808**	**938**
15	North Macedonia	**685**	**591**	**586**
16	Kosovo	**680**	**559**	**671**
17	Belarus	**472**	**195**	**1548**
18	Turkmenistan	**429**	**328**	**354**
19	Tajikistan	**331**	**360**	**259**
20	Ukraine	**0**	**0**	**5667**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on air connectivity are available to download.
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For the 12th year, ACI EUROPE published its annual European Airport Industry Connectivity Report — a comprehensive overview and analysis on airport connectivity measured in many dimensions. The report is based on data from SEO's NetScan connectivity model.

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. Airports and air connectivity support 14 million jobs, generating €851 billion in European economic activity (5% 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. Based in Brussels, we lead and serve the European airport industry and maintain strong links with other ACI regions throughout the world.

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Please note that with the 2024 release the methodology was updated to include all airports in the ACI EUROPE region as the aggregation basis for overall values. In the past, these values included solely ACI EUROPE member airports; therefore values have been occasionally restated resulting in an increased accuracy and overall depiction of the state of European airports' connectivity.