

The European air connectivity report reveals incomplete and imbalanced recovery, pointing to systemic changes in aviation market

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Brussels and Barcelona, 26 June 2023: On the eve of its 33rd Annual Congress and General Assembly, ACI EUROPE is today publishing the latest edition of the [Airport Industry Connectivity Report](#), the definitive barometer of air connectivity. The report is based on the connectivity indexes developed by SEO Amsterdam Economics - the most comprehensive and complete tool for measuring and ranking an airport's connectivity.

The Report for 2023 shows that air connectivity is lagging behind the recovery of passenger volumes. It also reveals how post-COVID recovery patterns are impacting not just the aviation market, but also the passengers and communities for whom connectivity serves mobility needs and delivers significant economic and social benefits. These post-COVID recovery patterns are shaping the connectivity performance of both national markets and individual airports, and they are driving structural changes with significant divergences between direct and indirect / hub connectivity.

Total air connectivity still not recovered more than three years after pandemic began

European total air connectivity, meaning combined direct and indirect connectivity, is still down -16% compared to pre-pandemic (2019) levels. This means that travellers from European airports continue to see fewer options – whilst the increase in air fares is more than 6 times above consumer price inflation¹.

A direct comparison with recovery in air passenger traffic shows connectivity significantly lagging behind, with European passenger traffic currently at -7.6%² against pre-pandemic levels.

Topline data masks significant divergences between national markets

These topline figures tell their own story, but beneath this lies significant divergences between national markets which essentially reflect the permanence of COVID-19 recovery patterns. In particular we see the importance of Leisure and VFR demand, the selective expansion of ultra-LCCs (ultra-Low Cost Carriers), and the relative retrenchment of FSCs (Full Service Carriers) - along with the impact of the war in Ukraine:

- Only 5 national markets have exceeded pre-pandemic connectivity levels: Türkiye (+19%), Cyprus (+17%), Bosnia-Herzegovina (+8%), Albania (+7%) and Greece (+4%).

- Amongst larger EU+ markets, UK (-10%) is best performing along with Spain (-12%), followed by Italy (-16%), France (-17%) and Germany (-27%) coming last.
- Other EU+ market such as Czechia (-44%) and Finland (-40%) remain far from having recovered their total connectivity level.
- As a result of Russia's invasion, Ukraine has lost all commercial air connectivity, with its airspace and airports closed.
- The international sanctions in response to the war in Ukraine have led to significant losses on total air connectivity for Belarus (-82%) and to a lesser - but still significant - extent for Russia (-34%).

Recovery patterns now driving structural changes in air connectivity

The same patterns which are influencing the divergences in national markets are also driving structural changes in air connectivity. Thus we see that direct connectivity (-4%) has almost recovered whereas indirect connectivity (-22%) and hub connectivity (-25%) both remain well below pre-pandemic levels.

This reflects the fact that LCCs have increased their direct connectivity by +12% since pre-pandemic (2019) while FSCs have seen their direct connectivity decreasing by -13%. Still, FSCs have protected and even increased their share of direct connectivity at their main hubs to 66%.

Istanbul, Amsterdam-Schiphol and London-Heathrow leading for direct connectivity

- Istanbul has this year replaced Amsterdam-Schiphol as the airport with the highest level of direct connectivity in Europe – moving up from the 5th position pre-pandemic. The Turkish hub has exceeded its pre-pandemic direct connectivity level by +9% and has increased it by a staggering +32% over the past 10 years - a performance largely driven by the growth of the network of Turkish Airlines. The still low penetration of LCCs at the airport points to its significant potential for further connectivity growth and diversification.
- Amsterdam-Schiphol's direct connectivity is at -8% compared to pre-pandemic and remains the best for intra-European direct connectivity. But if the decision of the Dutch Government to reduce its capacity is implemented, the airport will face downgrades in its ranking.
- London-Heathrow remains in the third position, with its direct connectivity at -5% compared to pre-pandemic. The British hub boasts by far the best direct connectivity to both North America and the Asia-Pacific regions.

Frankfurt #1 globally for hub connectivity, whilst illustrating systemic hub connectivity shrinkage

Frankfurt remains in the top position globally for hub connectivity – despite its hub connectivity level remaining -23% below pre-pandemic (2019). The German hub is followed by Istanbul (+31%) and Dallas Fort Worth (-19%).

With the performance of Istanbul as the notable exception, the European market is characterised by a systemic shrinkage of hub connectivity and considerable performance variations.

- Helsinki (-61%) and Rome-Fiumicino (-60%) have both seen their hub connectivity levels shrink dramatically since the pandemic - a result of the war in Ukraine impacting the Asia-focused network of Finnair and the replacement of Alitalia by a smaller ITA Airways.
- Stockholm-Arlanda (-54%), Warsaw (-43%), Brussels (-40%) and Munich (-37%) have also seen significant losses in hub connectivity levels.
- Only a few smaller and niche hubs have managed to exceed their pre-pandemic hub connectivity levels: Istanbul-Sabiha Gökçen (+37%), Athens (+33%), Lisbon (+4%) and Dublin (+3%).

Olivier Jankovec, Director General of ACI EUROPE, said: *"The COVID-19 pandemic, along with much increased geopolitical tensions – in particular the war in Ukraine – have clearly challenged the resilience of air connectivity. The report published today shows air connectivity in Europe is lagging behind traffic volumes, and being anything but uniform across geographies and airport markets.*

These are changes which appear to be systemic and quite possibly here to stay. Alongside this, the climate emergency is bringing the societal role and value of air connectivity into question. The formidable economic and social benefits of air connectivity need to go hand in glove with decarbonisation if we are to de-risk our collective futures.

This way, the entire aviation sector is working relentlessly towards tangible progress, firmly committed to net zero air connectivity".

Christiaan Behrens, project leader at SEO Amsterdam Economics, whose indexes are the basis for this report, said: *"The 10th Edition of this report provides a yardstick for the industry and provides actionable intelligence to airports and the public about the extent to which airports meet public demand for transport. As the industry recovers and rebuilds, it's never been more crucial to understand the recovery patterns and track their development. The Airport Industry Connectivity Report does exactly this".*

The Airport Connectivity Report 2023 has been produced with the support of [Ferrovial](#).

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¹ The consumer price inflation rate in the eurozone stood at +6% in May 2023, whereas air fares in Europe for the same month were running at +36% (sources: www.ec.europa.eu/eurostat/web/products-euro-indicators/w/2-01062023-AP | www.rdcaviation.com/products/apex/).

²Reference ACI EUROPE Airport Traffic Report April 2023.

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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.