
Appendix C: Air connectivity report for England (ex-South East)

C.1 This appendix provides an overview of the direct and indirect air connectivity of English Regional airports (those located outside the South East) by analysing the itineraries of passengers originating or terminating at the region's airports in international routes during May 2013. As seen in Table C1, approximately 4.3 million passengers flew between English Regional airports and the rest of the world, which represents 77.6% of the total for UK regions. It is worth noting that this does not include English passengers that transfer to other regions (i.e. South East) by road or rail to start their journey. In the absence of detailed information on said transfers, this report does not intend to be an accurate representation of the air transport demand of English Regional residents/visitors, rather than an assessment of the connectivity options that are available in the region's airports.

Table C1. Breakdown of UK regional traffic to/from worldwide destinations (May 2013)

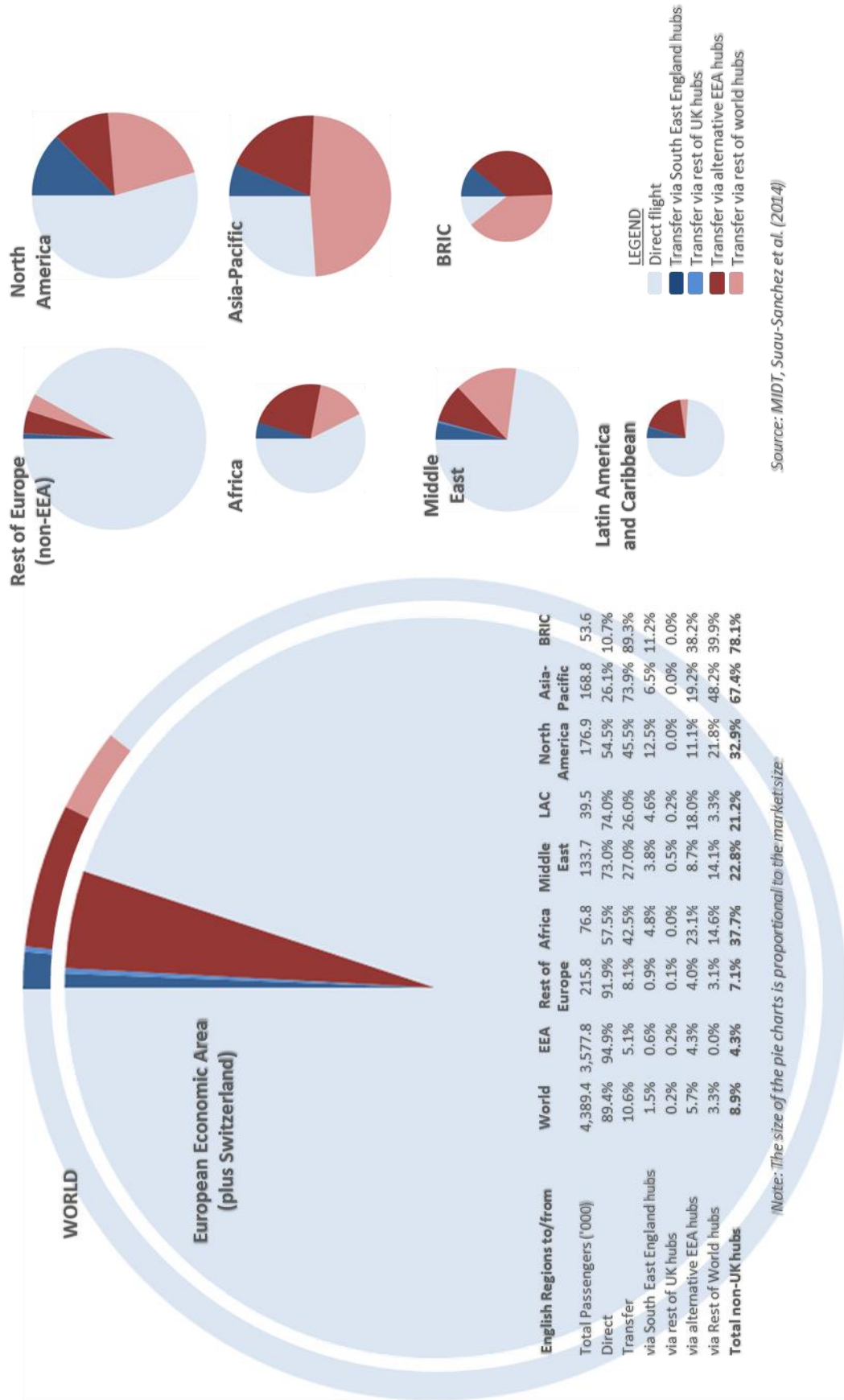
Traffic originating/terminating in	Passengers ('000)	%
Airports in England (ex-South East)	4,358.7	77.6%
Airports in Scotland	1,032.2	18.4%
Airports in Northern Ireland	138.9	2.5%
Airports in Wales	85.3	1.5%
Total	5,615.1	100.0%

C.2 Figure C1 indicates that 89.4% of passengers originating or terminating at English Regional airports fly non-stop to their international destinations. The remaining passengers (10.6%) fly indirectly through other airports, mostly via hubs from the European Economic Area (EEA). Direct connectivity is available to all the world's regions. The geographical market with more dependence on intermediate hubs is Asia-Pacific, where 73.9% of passengers connect and 67.4% do it via non-UK hubs. The traffic share of foreign hubs increases to 78.1% when considering the connectivity to BRIC countries (Brazil, Russia, India, and China). In consonance with the overall UK results, these figures are relevant in which they signal a clear dependence on foreign airports and airlines in order to keep the English regions connected by air to the world's emerging economies.

C.3 Tables C2 and C3 indicate the top-10 hub choices in each geographical market, measured by the proportion of connecting passengers across all hubs (absolute connectivity indicator: C_i')¹. The most relevant result is the dominance of Amsterdam and Dubai as the two most important gateways between the English regions and the rest of the world (31.5% of connecting passengers combined). London Heathrow is the third choice overall, accumulating 12.5% of connectivity, and it is the most important gateway to North America. Also noteworthy is the fact that Istanbul Ataturk provides the largest number of connections to non-EEA countries and the Middle East. Taking into account the evolution in the number of destinations served by the mentioned foreign airports in the last decade, in contrast with the stagnated Heathrow, results are not surprising in which they suggest a "decoupling" of English regional markets from the South East.

¹Note that proportions in Tables C2 and C3 are calculated over connecting passengers, while in Figure C1 they are calculated over total passengers. All these proportions are fully equivalent.

PASSENGER ITINERARIES: ENGLISH REGIONS (EX-SOUTH EAST) TO/FROM WORLDWIDE DESTINATIONS (MAY 2013)



Source: MIDT, Suau-Sanchez et al. (2014)

Table C2. Top 10 hub choices in routes to/from English regional airports by geographical market (May 2013)

<i>England Regional to/from</i>									
<i>World</i>	<i>EEA</i>		<i>Rest of Europe (non-EEA)</i>		<i>Africa</i>		<i>Middle East</i>		
Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'
Amsterdam	18.8%	Amsterdam	24.0%	Istanbul Ataturk	36.9%	Amsterdam	21.1%	Istanbul Ataturk	20.9%
Dubai	12.7%	Heathrow	9.5%	Amsterdam	16.6%	Dubai	20.6%	Dubai	16.9%
Heathrow	12.5%	Frankfurt	9.2%	Heathrow	10.9%	Paris-CDG	15.2%	Amsterdam	16.7%
Paris-CDG	6.8%	Paris-CDG	7.2%	Frankfurt	10.7%	Heathrow	11.2%	Heathrow	13.3%
Frankfurt	6.0%	Munich	6.4%	Munich	8.1%	Frankfurt	5.2%	Abu Dhabi	6.8%
Istanbul Ataturk	3.6%	Dublin	5.0%	Paris-CDG	4.0%	Brussels	4.8%	Frankfurt	6.7%
Munich	3.4%	Brussels	4.7%	Zurich	1.8%	Istanbul Ataturk	4.2%	Doha	5.6%
Abu Dhabi	3.1%	Copenhagen	4.6%	Dusseldorf	1.3%	Lusaka	2.8%	Paris-CDG	3.5%
Brussels	2.4%	Zurich	2.7%	Copenhagen	1.1%	Abu Dhabi	1.6%	Zurich	1.6%
Dublin	2.4%	Dusseldorf	2.6%	Brussels	1.1%	Doha	1.4%	Munich	1.1%
Total Passengers	4,358,695		3,547,079		215,833		76,830		133,724
Share of total	100%		81.4%		5.0%		1.8%		3.1%
Connecting passengers	461,931		181,056		17,543		32,671		36,170
Connecting rate	10.6%		5.1%		8.1%		42.5%		27.0%
Absolute connectivity:									
via SEE hubs	13.8%		12.2%		11.2%		11.3%		14.0%
via rest of UK hubs	1.8%		4.3%		1.0%		0.0%		1.8%
via alt. EEA hubs	53.5%		83.4%		49.5%		54.4%		32.1%
via Rest of World hubs	30.9%		0.1%		38.3%		34.3%		52.1%
Total non-UK hubs	84.4%		83.5%		87.8%		88.7%		84.2%

Table C3. Top 10 hub choices in routes to/from English regional airports by geographical market (May 2013)

<i>England Regional to/from</i>							
<i>Latin America and Caribbean</i>	<i>North America</i>		<i>Asia-Pacific</i>		<i>BRIC</i>		
Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'	Hub airport	Ci'
Amsterdam	30.9%	Heathrow	27.0%	Dubai	40.3%	Dubai	27.3%
Paris-CDG	21.6%	Amsterdam	13.7%	Amsterdam	12.9%	Amsterdam	18.2%
Heathrow	12.9%	Atlanta	11.4%	Abu Dhabi	10.1%	Heathrow	12.4%
Frankfurt	5.6%	Philadelphia	10.8%	Heathrow	8.7%	Paris-CDG	9.6%
Atlanta	5.1%	Newark	9.7%	Doha	7.1%	Doha	7.9%
Gatwick	4.6%	O'Hare	7.3%	Paris-CDG	5.5%	Frankfurt	6.3%
Newark	2.9%	Dulles	5.8%	Singapore	3.7%	Abu Dhabi	5.2%
Lisbon	2.8%	Paris-CDG	3.7%	Frankfurt	3.1%	Munich	2.0%
New York-JFK	1.4%	Dublin	2.2%	Istanbul Ataturk	1.7%	Zurich	1.9%
Barbados	1.0%	New York-JFK	1.8%	Munich	1.6%	Istanbul Ataturk	1.9%
Total Passengers	39,471		176,932		168,826		53,626
Share of total	0.9%		4.1%		3.9%		1.2%
Connecting passengers:	10,269		80,503		124,798		47,891
Connecting rate	26.0%		45.5%		73.9%		89.3%
Absolute connectivity:							
via SEE hubs	17.5%		27.5%		8.8%		12.5%
via rest of UK hubs	0.9%		0.1%		0.0%		0.0%
via alt. EEA hubs	69.0%		24.4%		26.0%		42.8%
via Rest of World hubs	12.6%		48.0%		65.2%		44.7%
Total non-UK hubs	81.6%		72.4%		91.2%		87.5%

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