
Appendix E: Air connectivity report for Northern Ireland

E.1 This appendix provides an overview of the direct and indirect air connectivity of Northern Ireland by analysing the itineraries of passengers originating or terminating at the region's airports (mostly at Belfast International Airport) in international routes during May 2013. As seen in Table E1, approximately 139,000 passengers flew between Northern Ireland and the rest of the world, which represents 2.5% of the total for the UK regions. It is worth noting that this does not include Northern Irish passengers that transfer to the Republic of Ireland 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 Northern Ireland's residents/visitors, rather than an assessment of the connectivity options that are available in the region's airports.

Table E1. 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%

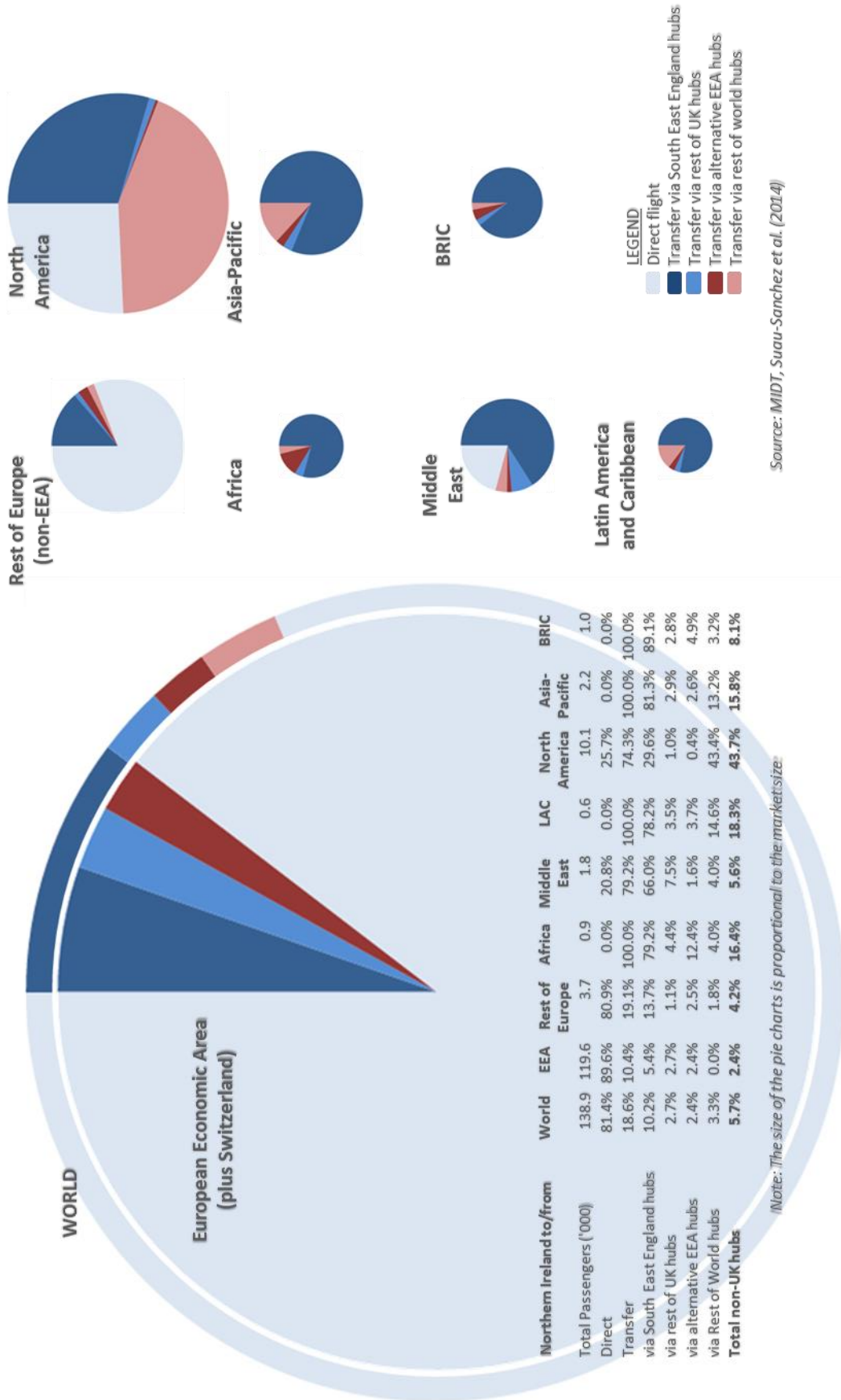
E.2 Figure E1 indicates that 81.4% of passengers originating or terminating at Northern Irish airports fly non-stop to their international destinations¹. The remaining passengers (18.6%) fly indirectly through other airports. In all geographical markets except North America, South East England hubs are the most important connecting gateway. The contribution of London airports is crucial in linking Northern Ireland with long-haul destinations in Africa, Asia-Pacific, and Latin America and Caribbean (LAC) where no direct travel options are available. The same picture is drawn when analysing connectivity to the BRIC countries. In this case, there is no substantial dependence in foreign hubs at the time of providing connectivity between Northern Ireland and the emerging economies.

E.3 Tables E2 and E3 indicate the top-10 hub choices in each of the geographical markets, measured by the proportion of connecting passengers across all hubs (absolute connectivity indicator: C_i)². The most relevant result is the dominance of London Heathrow as the most important gateway between Northern Ireland and the rest of the world (43.3% of connecting passengers). London Gatwick is also important in most markets and accumulates 10.4% of connectivity. Within the UK, Birmingham and Manchester provide access to European destinations and the Middle East. In regards to foreign airports, both Amsterdam and Paris-CDG accumulate less than 5% of connections and the only important hub is Newark, which provides more than half the connectivity (57.9%) to North America and also a small percentage of connections to the LAC region (12.2%).

¹ All direct connectivity to the Middle East is to Sharm el-Sheikh (Egypt).

² Note that proportions in Tables E2 and E3 are calculated over connecting passengers, while in Figure E1 they are calculated over total passengers. All these proportions are fully equivalent.

PASSENGER ITINERARIES: NORTHERN IRELAND TO/FROM WORLDWIDE DESTINATIONS (MAY 2013)



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

Table E2. Top 10 hub choices in routes to/from Northern Ireland's airports by geographical market (May 2013)

<i>Northern Ireland 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'
Heathrow	43.3%	Heathrow	34.4%	Heathrow	57.0%	Heathrow	69.7%	Heathrow	76.2%
Newark	15.9%	Gatwick	14.9%	Stansted	7.7%	Gatwick	9.5%	Manchester	8.0%
Gatwick	10.4%	Birmingham	8.3%	Gatwick	7.0%	Paris-CDG	3.9%	Gatwick	6.4%
Manchester	4.5%	Manchester	7.6%	Istanbul Sabiha	6.3%	Madrid	3.6%	Abu Dhabi	1.9%
Birmingham	4.2%	Paris-CDG	4.4%	Paris-CDG	4.9%	Palma de Mallorca	3.5%	Glasgow	1.0%
Paris-CDG	2.8%	Amsterdam	3.8%	Exeter	3.7%	Exeter	3.4%	Paris-CDG	0.8%
Amsterdam	2.1%	Edinburgh	3.7%	Amsterdam	3.5%	Freetown	1.4%	Luton	0.7%
Edinburgh	1.9%	Palma de Mallorca	3.0%	Istanbul Ataturk	2.3%	Johannesburg	0.9%	Doha	0.6%
Palma de Mallorca	1.6%	Frankfurt	2.5%	Dusseldorf	1.6%	Casablanca	0.7%	Jeddah	0.5%
Frankfurt	1.3%	Glasgow	2.1%	Birmingham	1.2%	Amsterdam	0.6%	Cairo	0.5%
Total Passengers	138,858		119,558		3,662		854		1,797
Share of total	100%		86.1%		2.6%		0.6%		1.3%
Connecting passengers	25,813		12,453		700		854		1,423
Connecting rate	18.6%		10.4%		19.1%		100.0%		79.2%
Absolute connectivity:									
via SEE hubs	55.1%		51.5%		71.9%		79.2%		83.4%
via rest of UK hubs	14.5%		25.9%		6.0%		4.4%		9.5%
via alt. EEA hubs	12.9%		22.6%		12.9%		12.4%		2.0%
via Rest of World hubs	17.5%		0.0%		9.2%		4.0%		5.1%
Total non-UK hubs	30.4%		22.6%		22.1%		16.4%		7.1%

Table E3. Top 10 hub choices in routes to/from Northern Ireland's airports by geographical market (May 2013)

<i>Northern Ireland 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'
Gatwick	57.5%	Newark	57.9%	Heathrow	80.3%	Heathrow	84.4%
Heathrow	20.7%	Heathrow	37.4%	Dubai	3.7%	Gatwick	4.7%
Newark	12.2%	Gatwick	2.3%	Singapore	2.1%	Paris-CDG	2.7%
Paris-CDG	3.8%	Manchester	0.6%	Los Angeles	1.6%	Exeter	1.8%
Exeter	3.5%	Glasgow	0.3%	Manchester	1.4%	Amsterdam	1.4%
Antigua	1.5%	Paris-CDG	0.3%	Hong Kong	1.4%	Mumbai	1.2%
Saint Lucia	0.5%	Exeter	0.2%	Newark	1.3%	Beijing	0.9%
Nassau	0.3%	Toronto City	0.2%	Gatwick	1.1%	Dubai	0.6%
Sao Paulo	0.2%	Birmingham	0.2%	Amsterdam	1.0%	Manchester	0.5%
-	-	Vancouver	0.1%	Paris-CDG	0.8%	Birmingham	0.4%
Total Passengers	627		10,122		2,238		1,031
Share of total	0.5%		7.3%		1.6%		0.7%
Connecting passengers	627		7,518		2,238		1,031
Connecting rate	100.0%		74.3%		100.0%		100.0%
Absolute connectivity:							
via SEE hubs	78.2%		39.8%		81.3%		89.1%
via rest of UK hubs	3.5%		1.3%		2.9%		2.8%
via alt. EEA hubs	3.7%		0.5%		2.6%		4.9%
via Rest of World hubs	14.6%		58.4%		13.2%		3.2%
Total non-UK hubs	18.3%		58.9%		15.8%		8.1%

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