

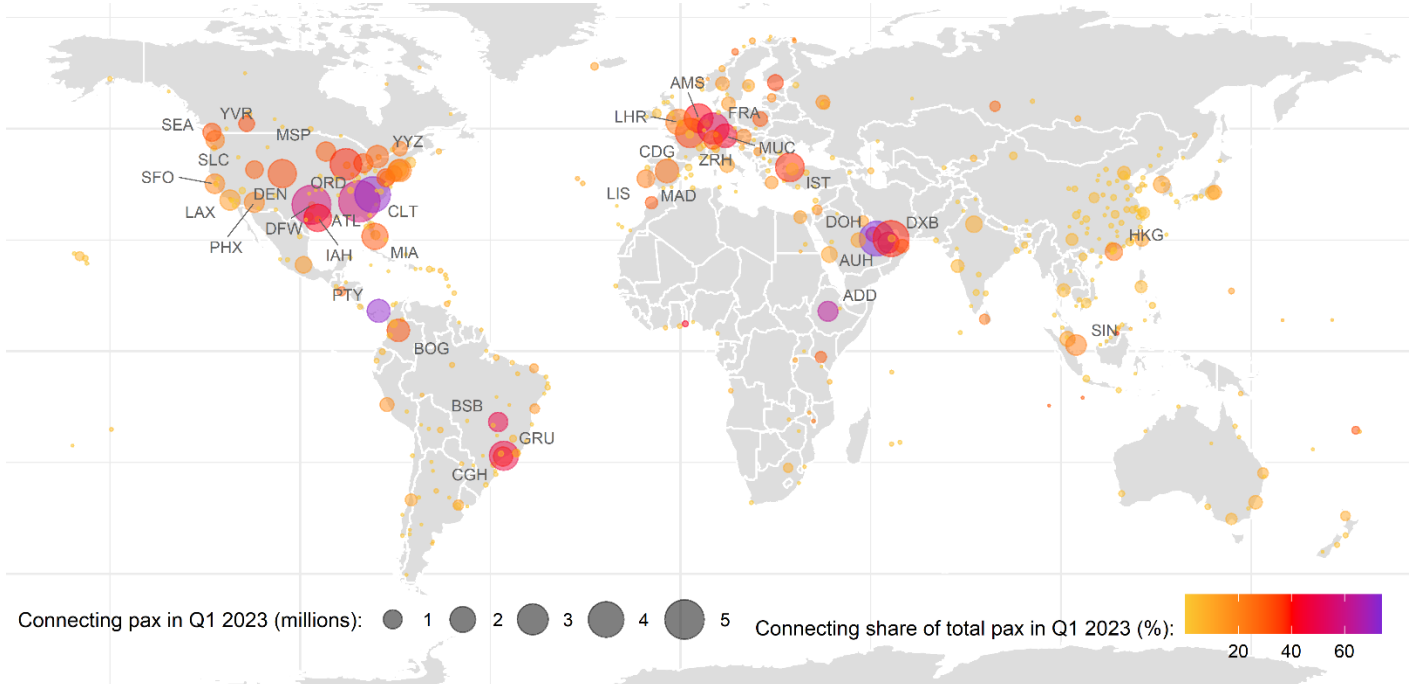


Chart of the Week

22 September 2023

Airlines operate key hubs for growth and connectivity

Connecting passenger traffic by hub airport, first quarter of 2023 (Q1 2023)



Source: IATA Sustainability and Economics, based on data from DDS.

Note: Airports meeting a minimum threshold of connecting passengers are shown on the map.

- Airlines efficiently connect passengers across cities using strategic hub-and-spoke systems, consolidating and directing travelers through central hub airports. This approach enables airlines to resourcefully transport an increasing number of passengers to various destinations while benefiting from economies of scale and traffic density. Today's chart highlights the pivotal airports through which airlines facilitate passenger flows between global markets, driving strong traffic recovery and connectivity growth.
- The adoption of hub-and-spoke networks gained momentum in the US following the Airline Deregulation Act in 1978. Airlines reconfigured their route networks, connecting more cities and increasing flight frequency. As a result, with a large domestic traffic base, the US accounts for a substantial portion of global connecting traffic (41% in Q1 2023). US airports also host a wide spectrum of hub operations, ranging from those with lighter transfer traffic shares (e.g., LAX at 15% of total passengers) to those with a strong mix (CLT at 72%). Meanwhile, in Europe and Asia, airlines operate extensive point-to-point routes, while also maintaining significant international hub operations, collectively contributing 24% and 11% of the world's connecting passengers, respectively.
- Geographic positioning plays a critical role in determining hub locations, with globally central hubs offering considerable advantages for linking passengers between various regions. Notably, Middle Eastern airports exemplify this, capturing 11% of global connecting traffic, with one major hub airport (DOH) serving nearly 75% of its total passengers through international transfer flights. As demographic shifts are expected to gradually move the aviation industry's center of gravity toward Asia in the coming decades, it will be interesting to observe how the future evolution of hub-based airline operations in the region will support traffic growth and connectivity.

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