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THE BACKBONE OF EUROPEAN CONNECTIVITY:

REGIONAL AIRPORTS, ROUTES & AIRLINES

WEDNESDAY 28TH JANUARY

WEBINAR

SPEAKERS

John Grant

Chief Analyst, OAG

With a wealth of experience across the global aviation industry, John provides expert commentary on market developments for OAG, making connections between what the data is telling us and the trends and events occurring in the sector.

Petri Vuori

Senior Vice President, Sales and Route Development, Finavia

Petri Vuori leads route development at Finavia, which operates 20 airports across Finland and serves over 20 million passengers annually. In his role, Petri develops business cases for airlines and identifies new route and growth opportunities to and from Finland.

Deirdre Fulton

Partner, MIDAS Aviation

Deirdre is a partner in an aviation consultancy providing meaningful insight and analysis to clients around the world. She works closely with OAG on their data analysis and publications.

TODAY'S DISCUSSION

In this webinar we'll be examining the role of regional airports, routes and airlines in shaping European connectivity.

We'll be exploring the following:

- The role regional airports play in their communities
- How the pandemic changed regional connectivity in Europe
- The challenges for regional airlines in today's environment

We'll be taking questions as we go. Please use the chat function to ask your questions

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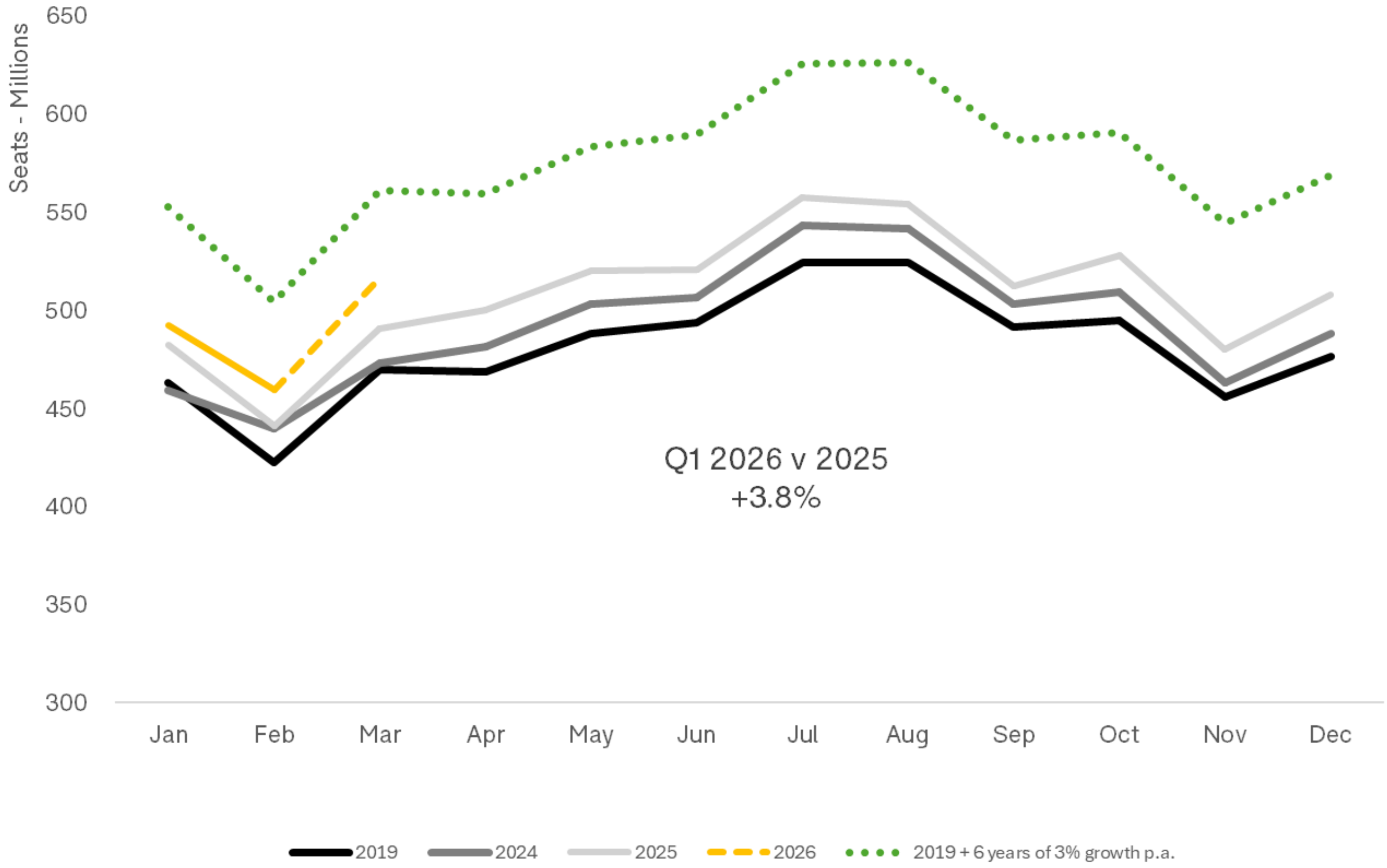
Global capacity growth trend strengthens year on year



Capacity growth for Q1 is 3.8% ahead of 2025, stronger than the 2025 v 2024 full year growth rate of 3.1%

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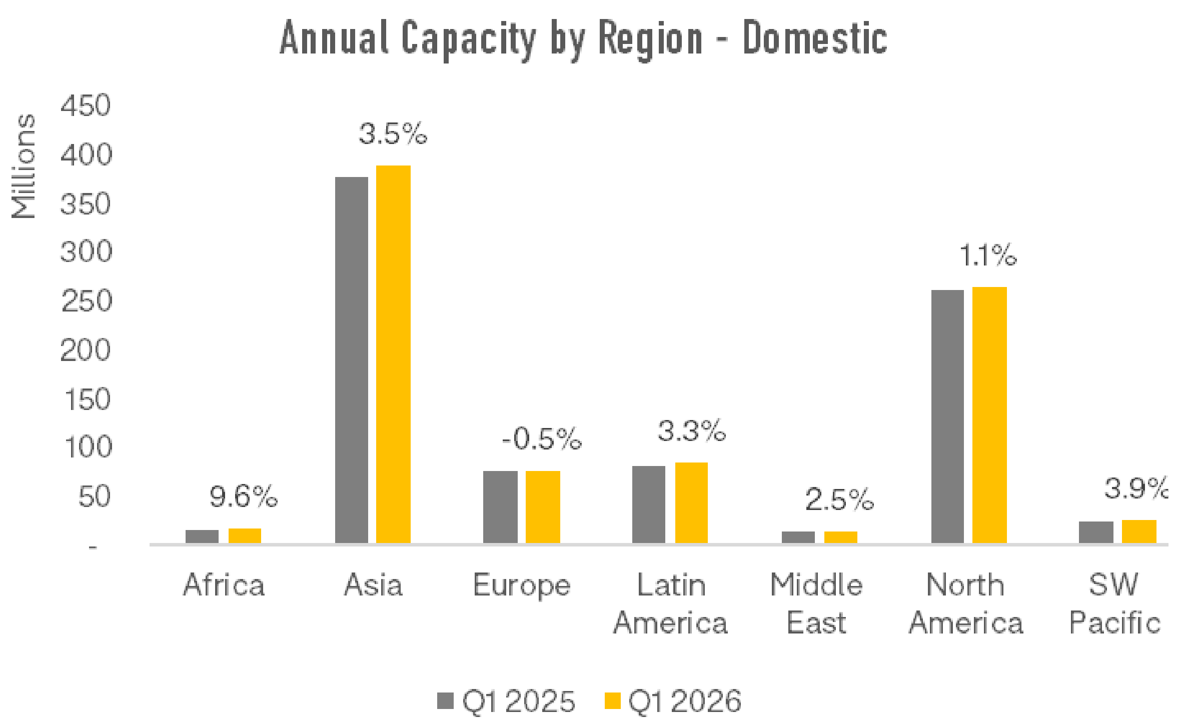
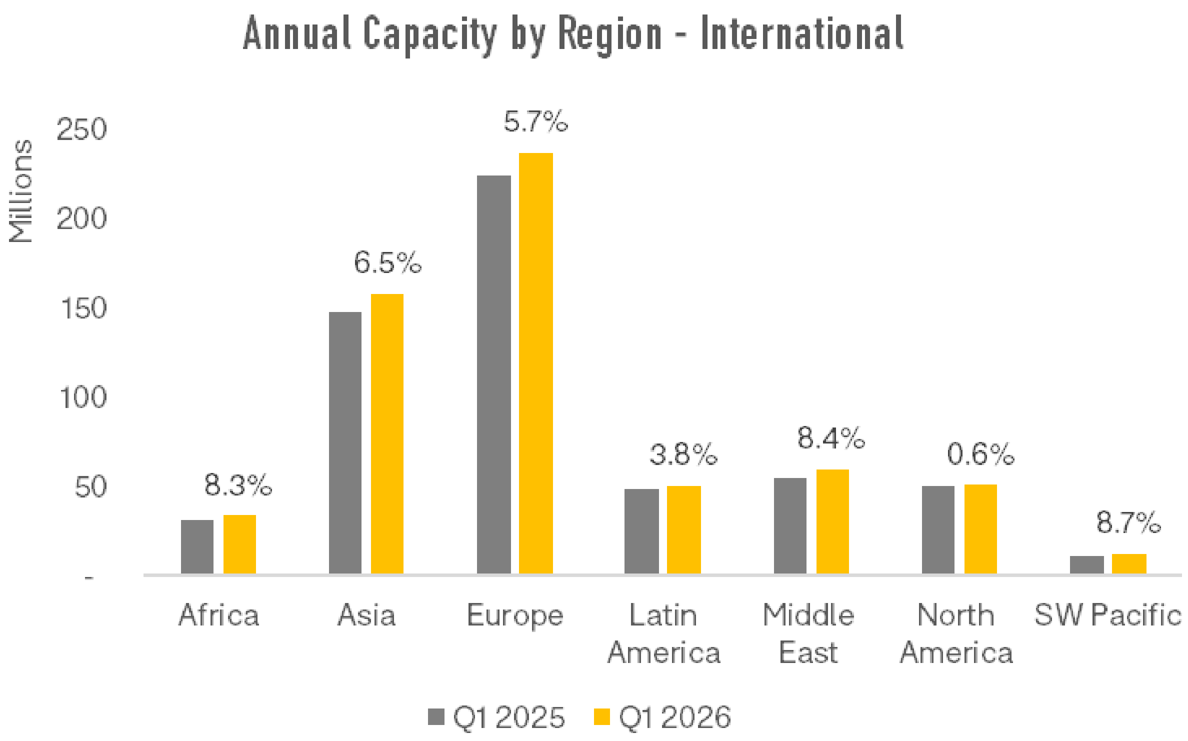
Q1 2026 International growth more than double domestic



Global domestic growth overall this quarter is 2.5% with the fastest growing region for domestic capacity this quarter is Africa, up 9.6% on last year.

Global international growth rate is more than double, up 5.7%. A number of regions are growing faster than the average – notably the Middle East at 8.4% and SW Pacific at 8.7%



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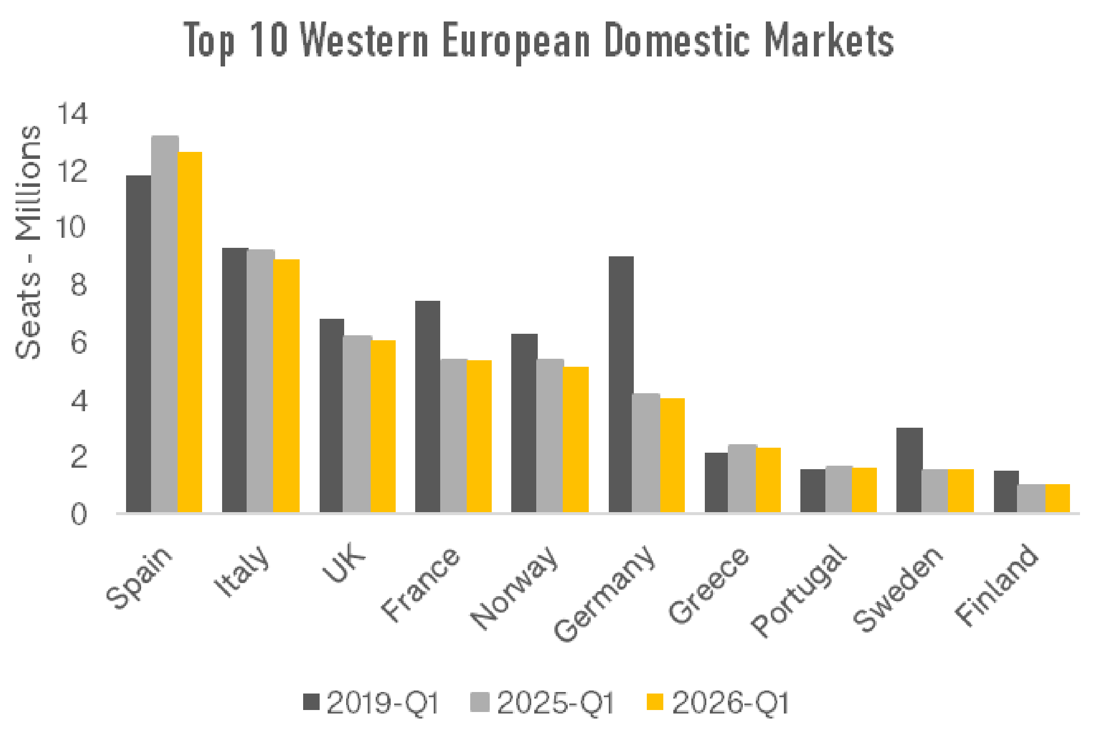
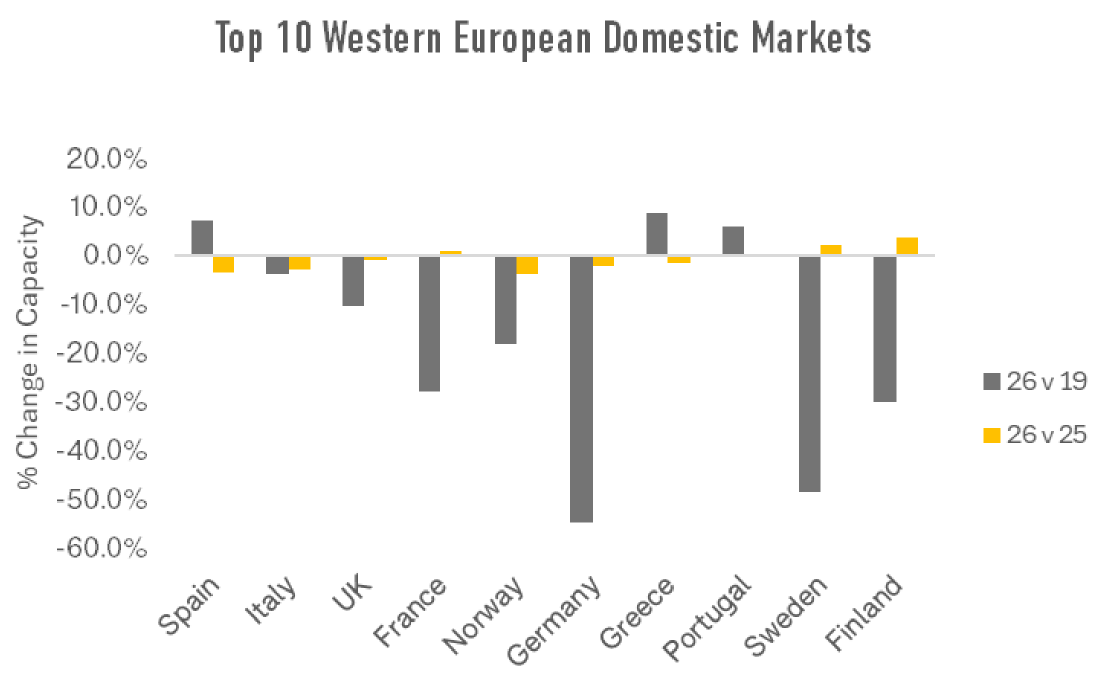
Q1 2026 European domestic markets capacity stalling





Across Europe's largest domestic markets capacity is mostly contracting in Q1 2026 v 2025 with only France, Sweden and Finland seeing growth. Many markets have seen a considerable reduction on 2019 volumes

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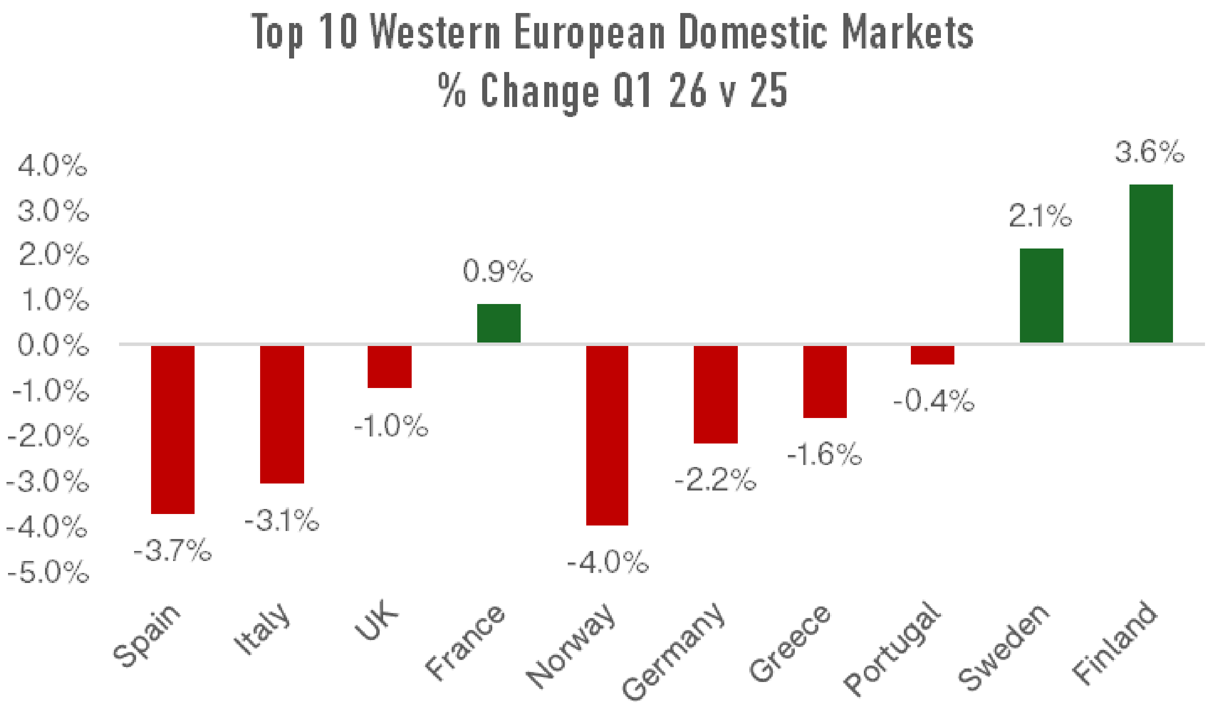
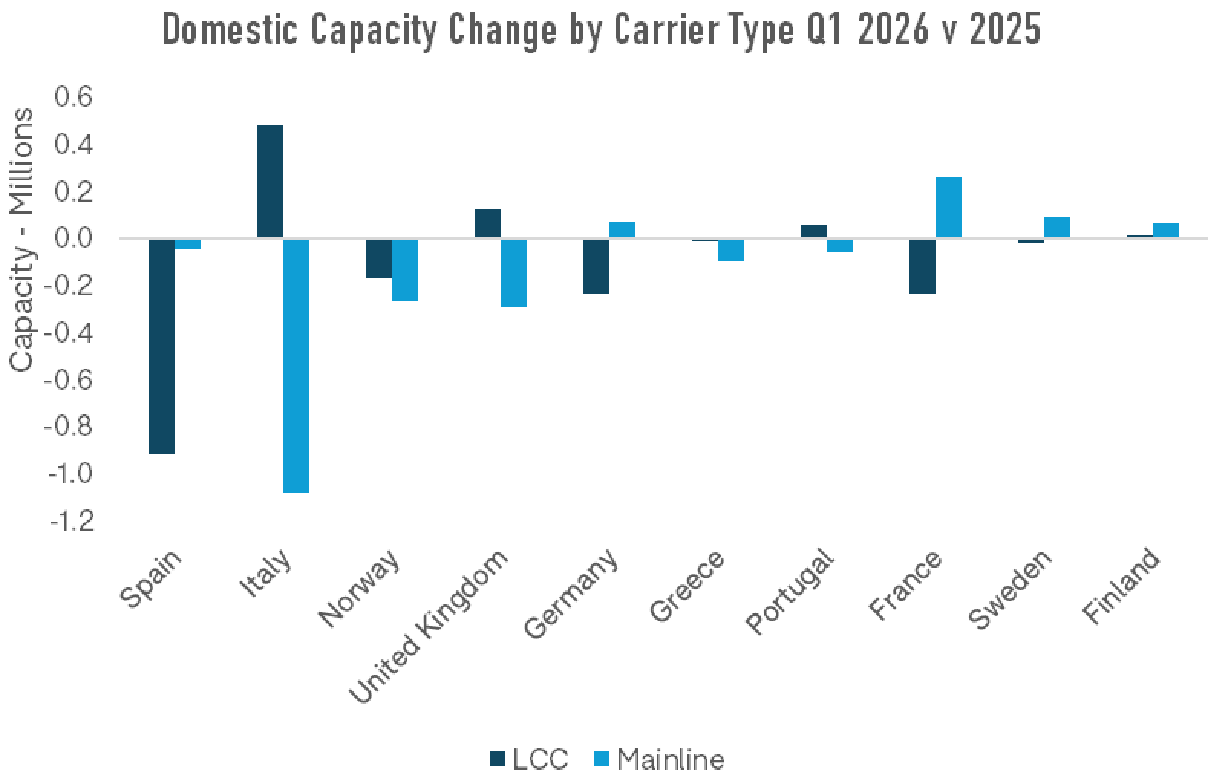
Domestic growth trends varied across Europe





Spain is down 3.7% with significant reductions from LCCs driving this reduction. The opposite is true in Italy where mainline reductions from Italy's ITA not being offset by growth from Ryanair. UK capacity is impacted by the loss of two regional airlines – Eastern Airways and Blue Islands.

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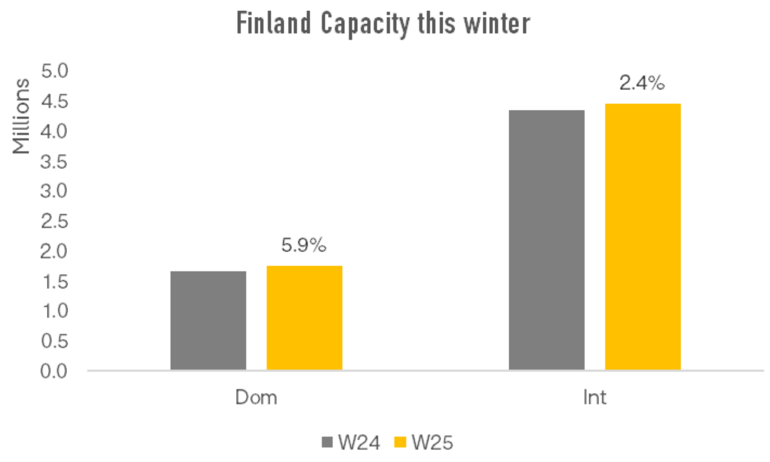
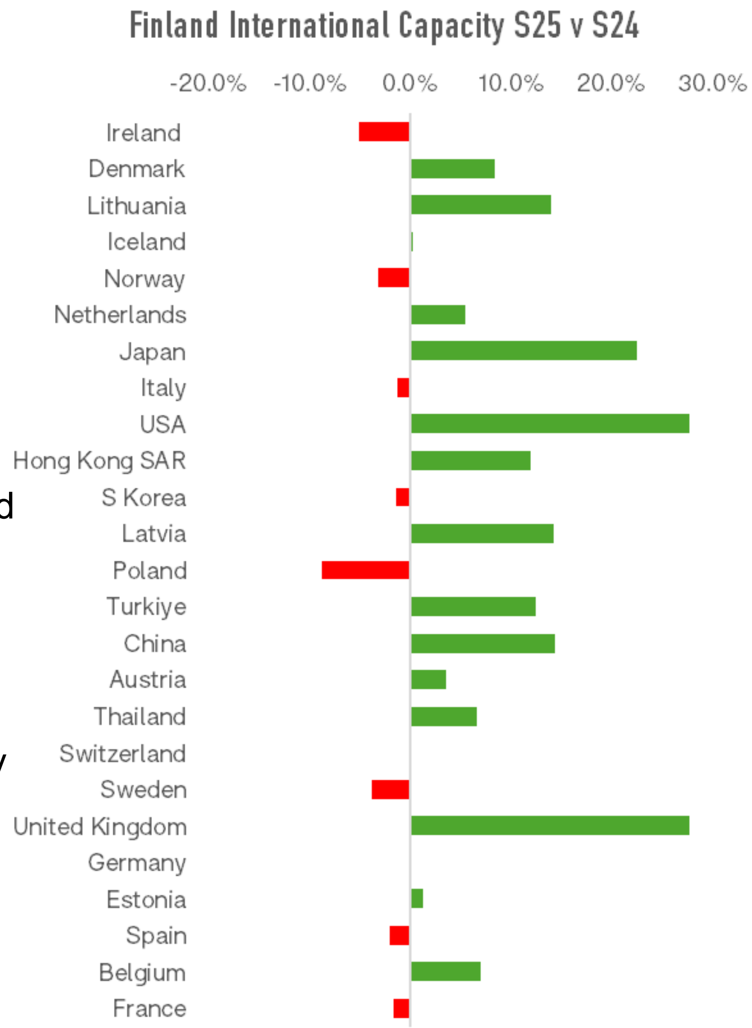
Finland's appeal broadening at home and abroad



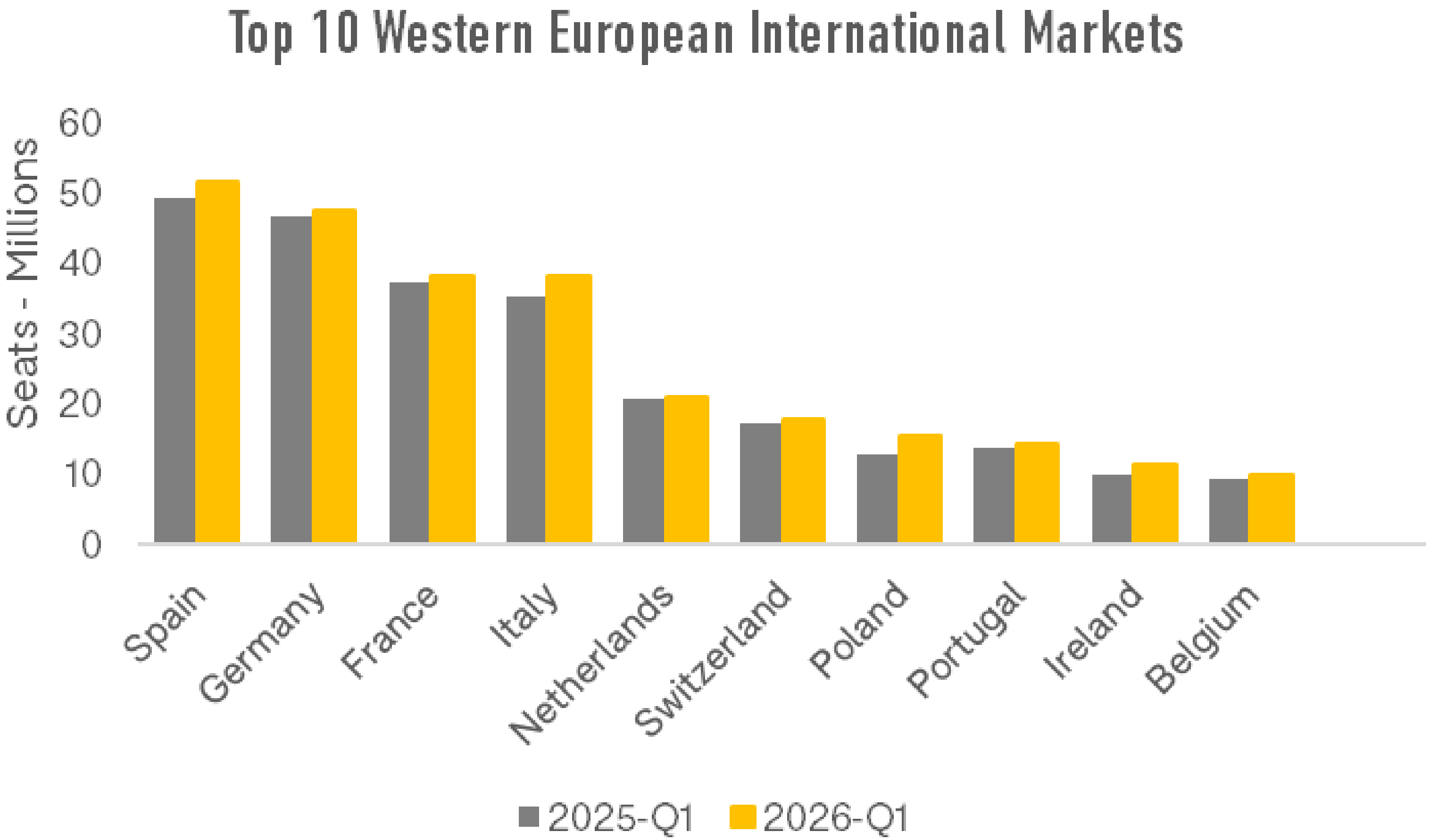


Domestic capacity growth this winter in Finland is strong – with Rovaniemi recording an increase this winter of 15.7% (Santa remains popular!) and Helsinki capacity is up by 5.7%.

International capacity growth this winter is a little slower, however there is a mix of capacity reductions from some of the larger Western European markets, offset by growth from several others.

This winter sees strong growth across many European markets but also from further afield – Japan, the USA, and Hong Kong although winter capacity growth has plateaued from Europe's largest markets

Q1 2026 Europe’s largest international markets are growing



Looking at international capacity growth in Europe shows a more positive picture, particularly in Poland, Ireland and Italy. Some of this growth is as a result of the redistribution of capacity undertaken this winter by Ryanair

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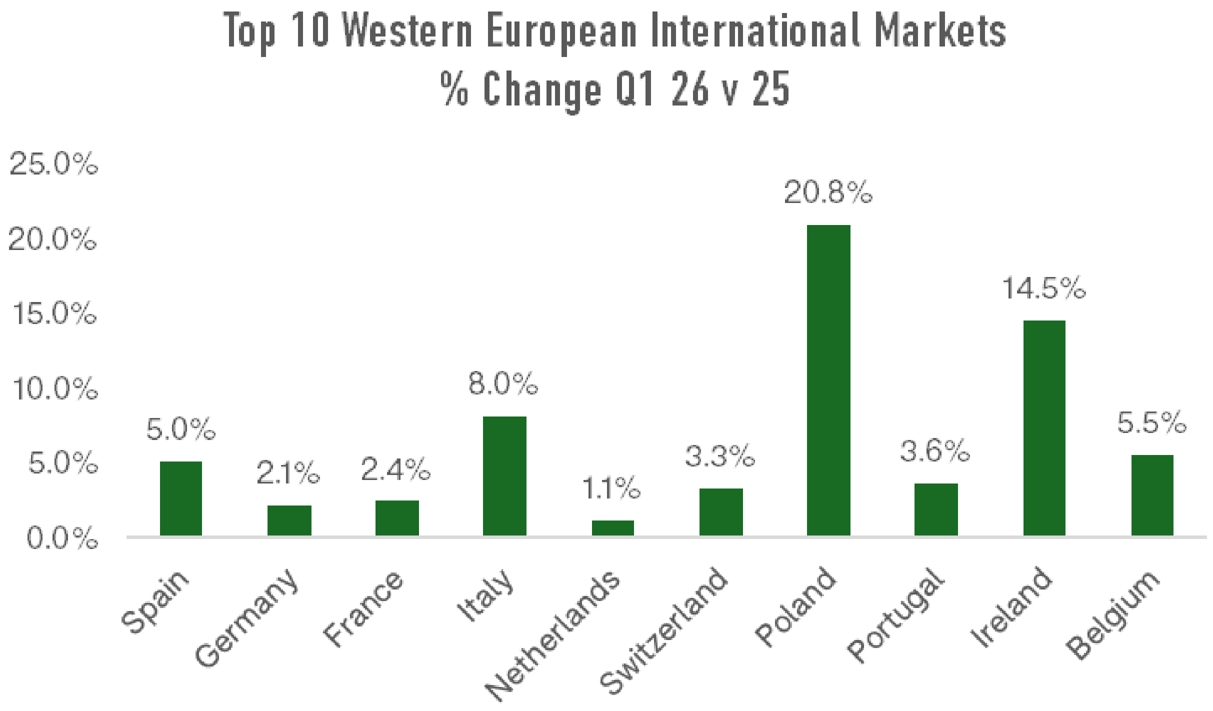
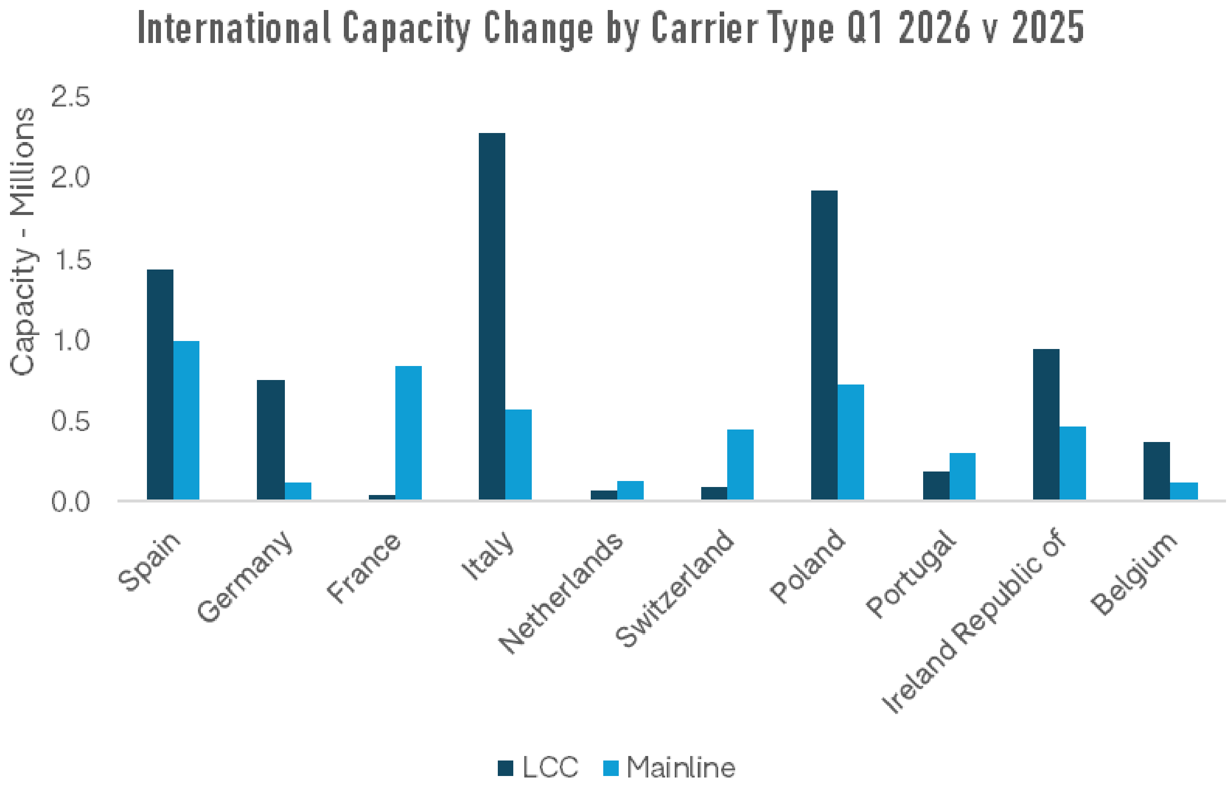
LCCs continue to drive growth across Europe





The markets with most growth – Spain, Italy, Poland and Ireland are all seeing growth being driven by LCCs.

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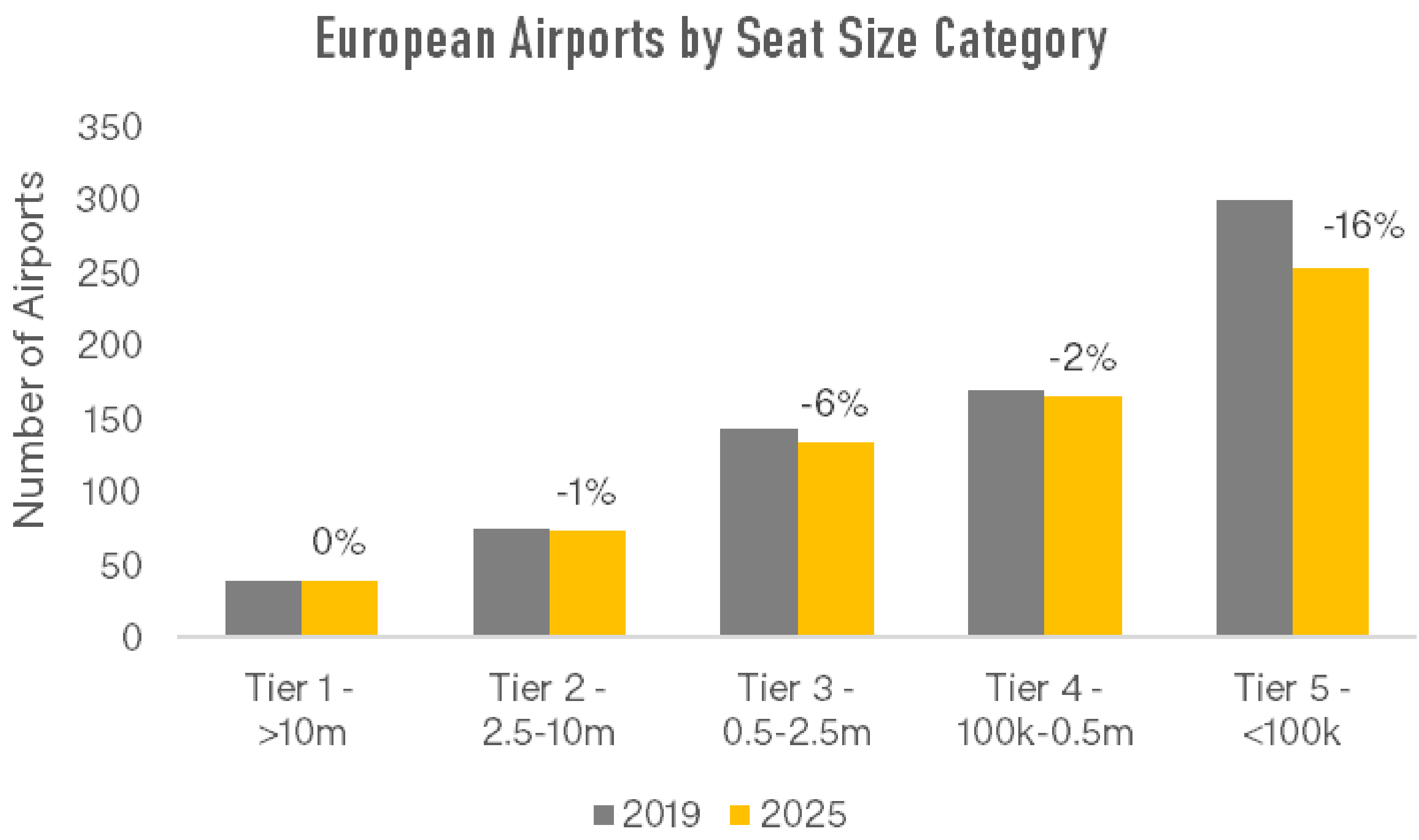
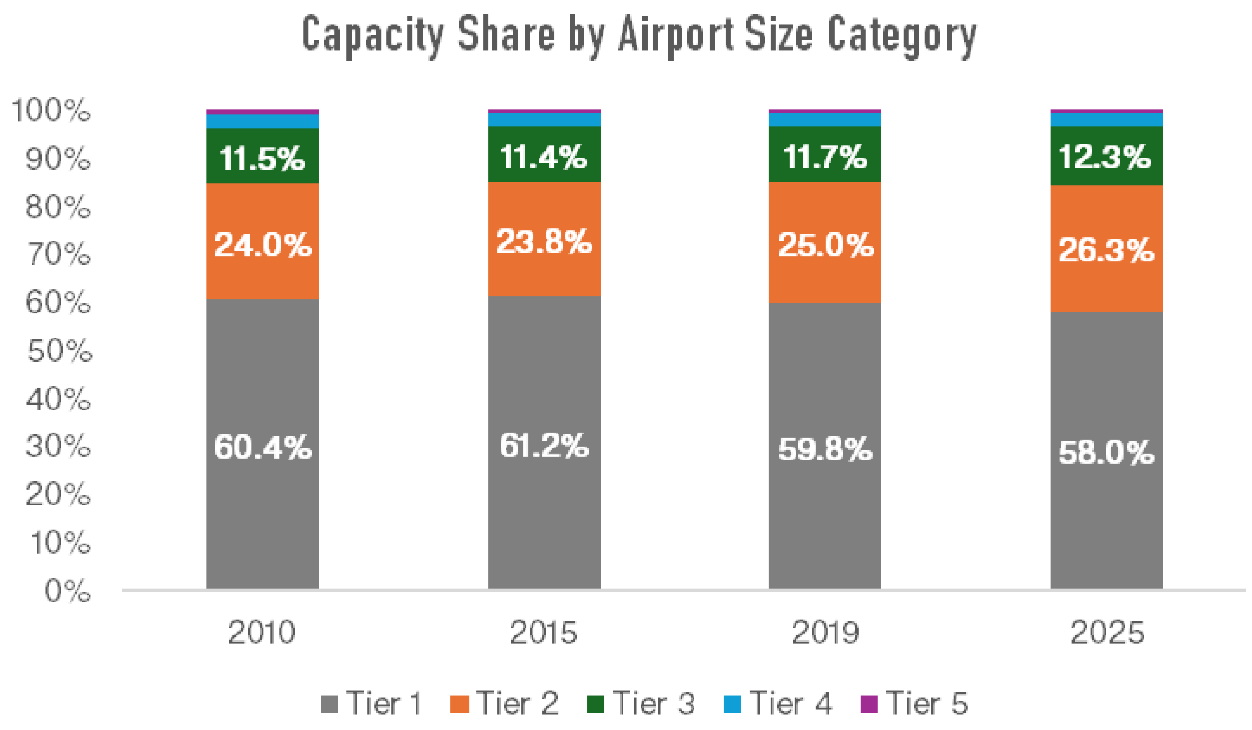
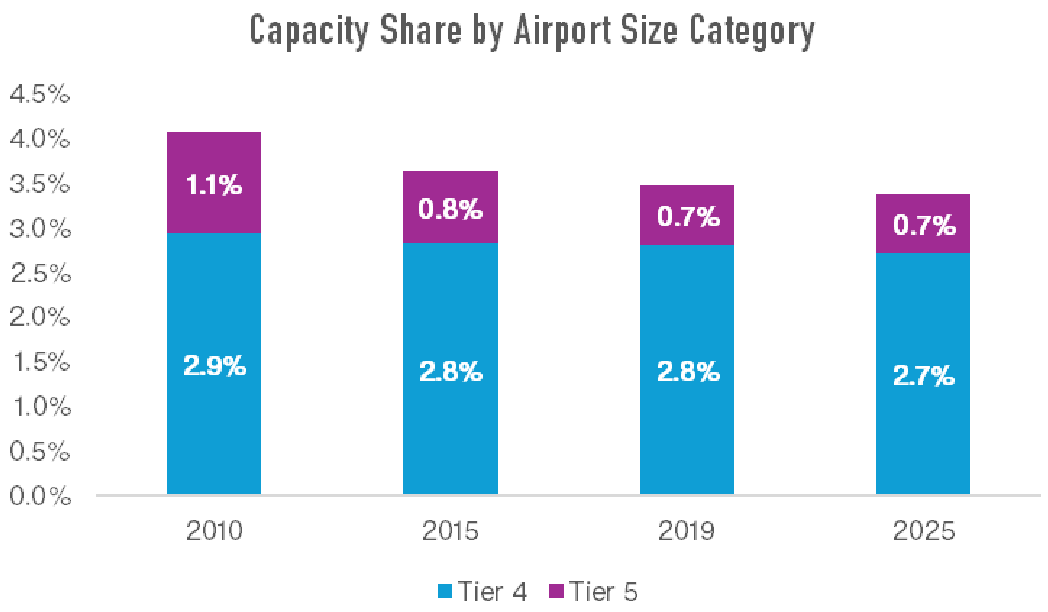
Regional Airports in Europe



In 2019 there were 725 airports with scheduled services in Europe. By 2025 this had fallen to 664, with the majority of the reduction in the very small airport category. Just under half of these – 344 airports - have networks that are solely focused on Europe.

Regional Airports in Europe see some capacity redistribution, but small airports lose out





Since 2010 the share of capacity in Europe operated at the largest airports (Tier 1 >10m seats) has fallen from 60% down to 58%. This has mostly gone to Tier 2 and Tier 3 airports, with the share of capacity at the smallest airports dropping from 4% to 3.4%

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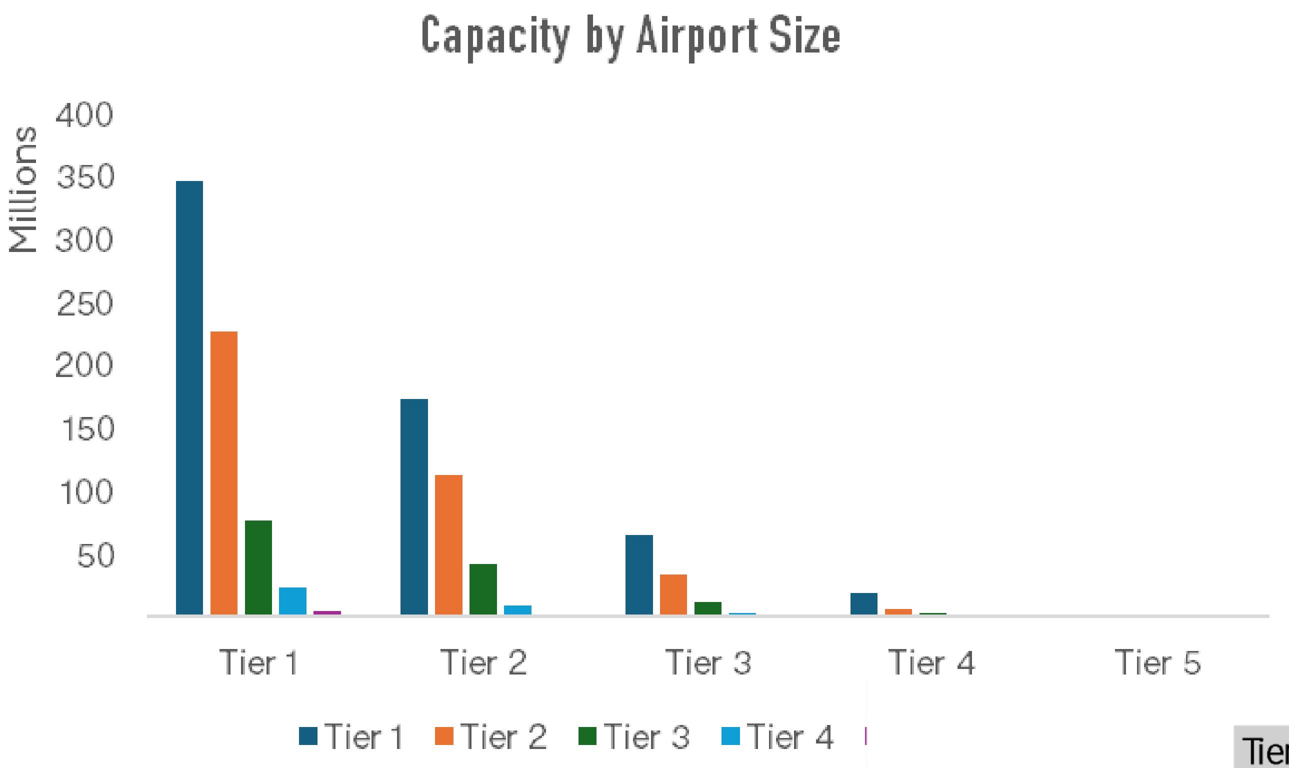
Regional Airports in Europe – Post Pandemic Connections



Connections between and to/from Tier 1 airports account for the greatest share of connections within Europe, at 58% in 2025. This has increased from 55% in 2019.

Tier 3 airports (0.5m – 2.5m annual seats) have seen the largest drop in connections by 15% overall, with connectivity to Tier 3,4, and 5 airports down by around a third.

Departure Airport Tier \ Arrival Airport Tier	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5
Tier 1	10%	22%	-3%	14%	4%
Tier 2	3%	11%	-12%	-14%	-5%
Tier 3	-14%	-5%	-30%	-32%	-40%
Tier 4	7%	29%	-9%	-31%	10%
Tier 5	-10%	-19%	-12%	-30%	4%

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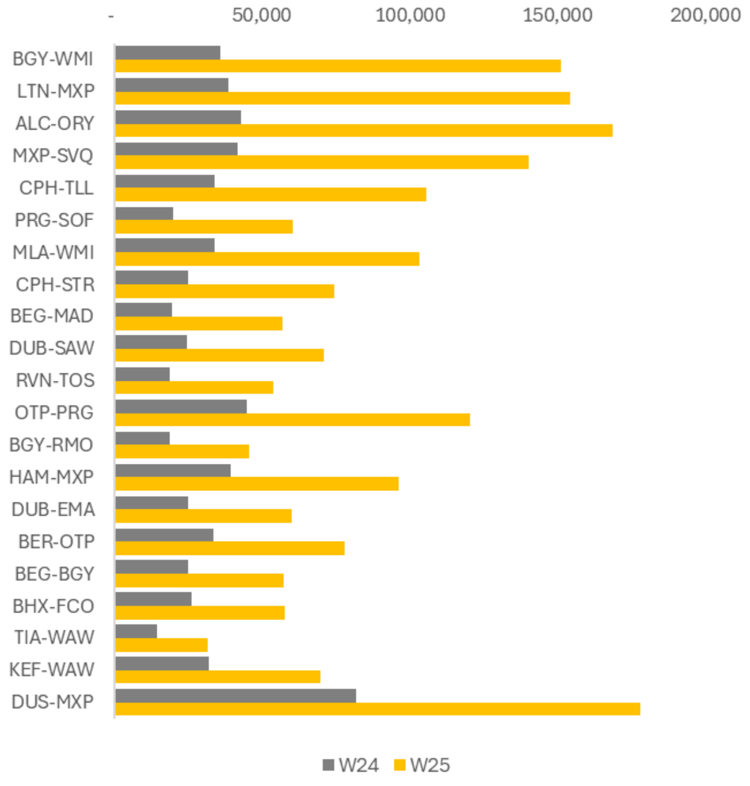
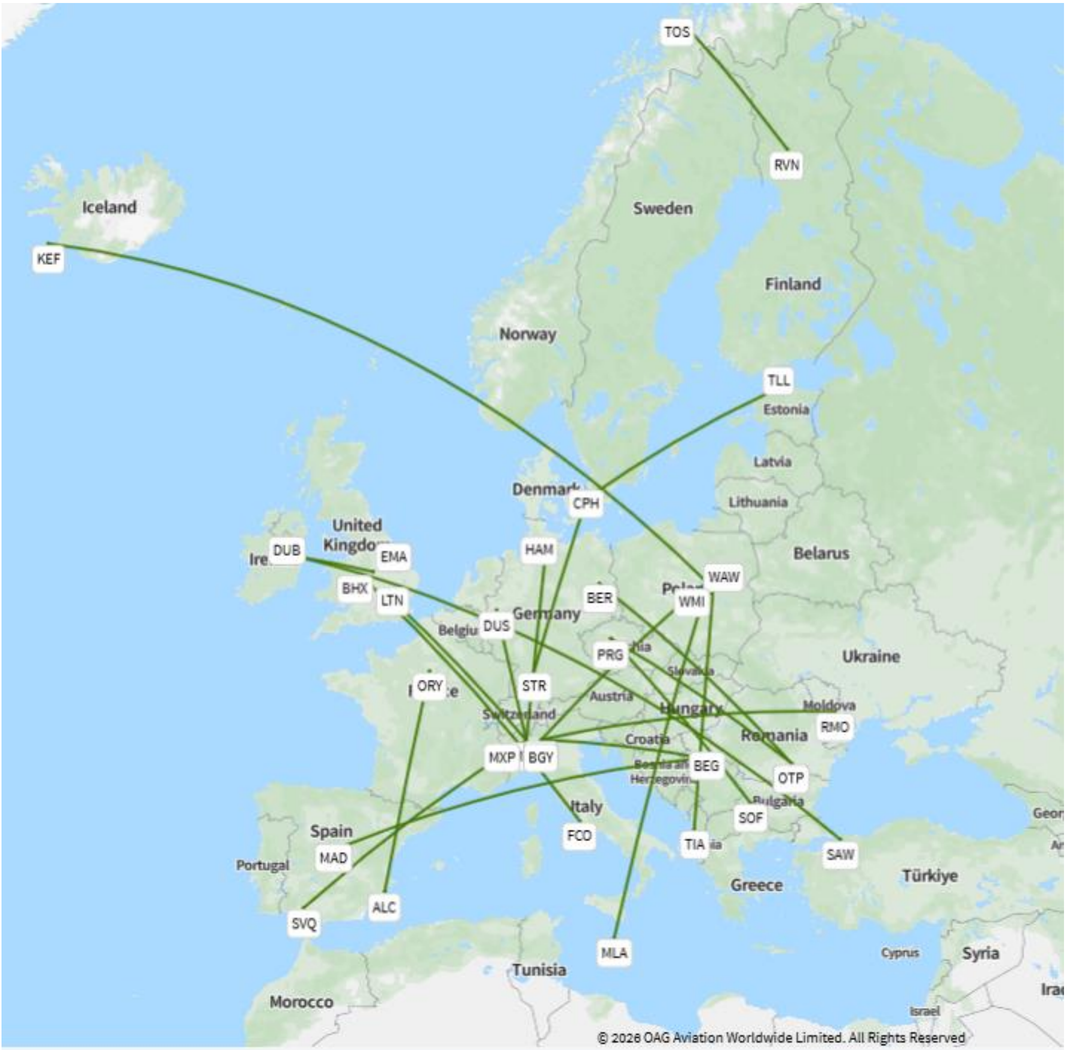
Europe’s fastest growing international routes

Most of Europe’s fastest growing routes this winter have seen capacity either triple or double since last winter.

Frequency has increased on average from 10 per week to 25 across this broad range of European routes

Top 20 Fastest Growing International Routes within Europe





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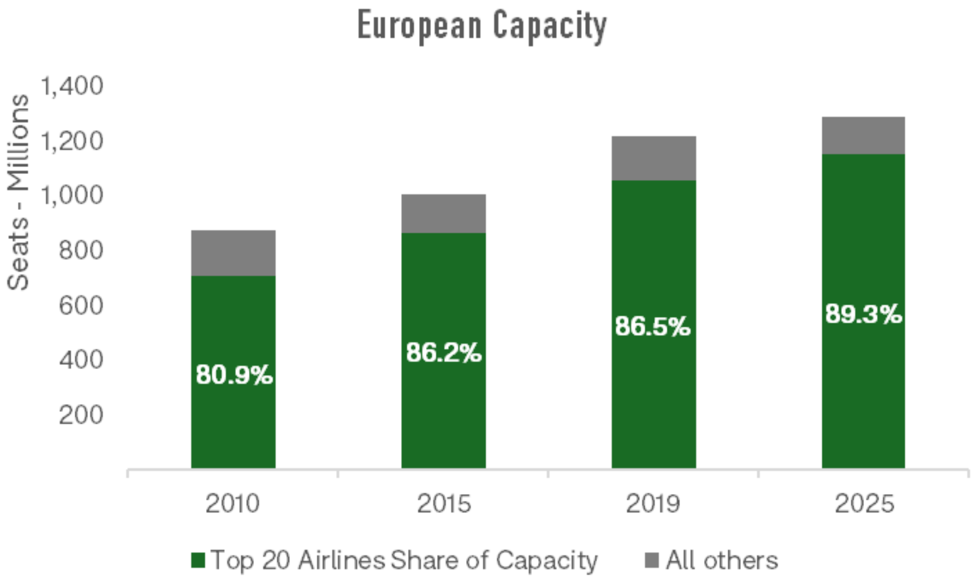
Less European airlines now than in 2010

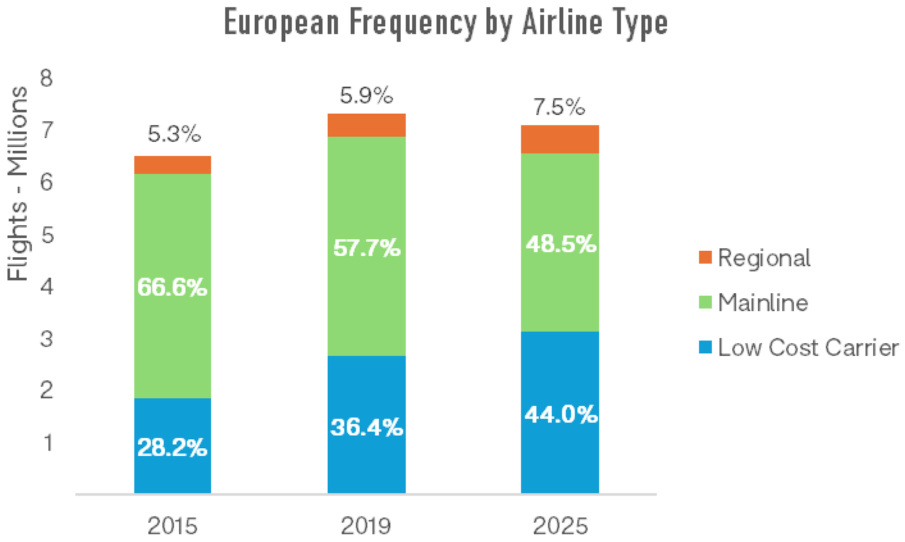
Since 2010 the number of European domiciled airlines in Europe has fallen by 25% down to 151.

Just 59 of these operate solely in the European market and so could be identified as regional carriers. Carriers in this category have fallen by 43% since 2010. This includes the demise of carriers such as Flybe, Air Berlin, WOW Air, Blue Air and many others.

The share of capacity operated by the Top 20 biggest carriers has also become more concentrated, increasing from 81% to 89%.

For frequency operating within Europe, Mainline carriers have lost 20% market share in the last 10 years to LCCs, with regional carriers growing share slightly – with the recent collapse of Eastern, Blue Islands and Braathens this will fall slightly in 2026.





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Europe's route churn

European domestic routes have remained static since 2019, with just one less route operating in 2025 than previously.

International routes have fallen by 23 since 2019.

The churn rate for domestic routes is 2.1% and for international routes 2.8%.

Most of the route growth has come from LCCs with Ryanair adding most – 621 additional routes since 2019

Scheduled Airport Pairs Operated By European Airlines

2019-2025

Airport Pairs	2019	2020	2021	2022	2023	2024	2025	2025 V's 2019
International	9,494	7,198	7,547	8,942	8,964	9,269	9,471	-23
International Churn, YoY		-2,296	349	1,395	22	305	202	
Domestic	2,262	2,190	2,375	2,459	2,287	2,325	2,261	-1
Domestic Churn, YoY		-72	185	84	-172	38	-64	

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Airport Pairs Operated By European Airlines

2019-2025

Airline	2019	2020	2021	2022	2023	2024	2025	2025 V's 2019
Ryanair	2,052	1,898	2,306	2,594	2,631	2,677	2,673	621
EasyJet	1,082	920	807	978	1,005	1,089	1,217	135
Wizzair	687	813	870	1,027	936	808	898	211
Pegasus Airlines	203	190	220	241	136	290	304	101
Vueling	327	247	313	337	298	250	236	-91
Eurowings	448	253	302	356	427	468	475	27
Turkish Airlines	492	425	454	529	500	438	319	-173
Deutsche Lufthansa	346	327	337	341	325	322	308	-38
British Airways	324	286	229	312	284	282	267	-57
Air France	290	302	290	305	273	232	222	-68
KLM	177	181	178	186	189	174	179	2

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