ITF Transport Outlook Session

Air connectivity

Access to world markets
Air connectivity

Measure the easiness of access to opportunities by air

- Conceptually simple
- Expressed in « real-world » unit
- Global coverage
Air connectivity

City above 300,000 Inhabitants
Air connectivity

- Alpha city
- City above 300,000 inhabitants
Air connectivity

- Access to airports
- Flight time
- Fares
- Frequency
Measuring air connectivity

Connected to 20 closest airports

All routes up to two transfers

Origin city

A

B

C

D

Alpha-city

Flight time
Price
Frequency

Access time on road network

Connected to 20 closest airports

All routes up to two transfers
Very large range of outcomes for connectivity across the world

Average travel time to alpha-cities in 2013
Access explains most of the difference between regions.

Connectivity gap between Africa and Europe

16.5 hours

- Access: 45%
- Flight time: 35%
- Geography: 20%

2013

Travel time [h]

Europe | North America | OECD Pacific | CIS | Middle East | Asia | Latin America | Africa

500 km/h | 300 km/h
Catching up of developing regions has already happened

Connectivity improvement from 2004 to 2013

2.5 hours

50% of improvement from access
Connectivity will continue to improve as the network grows

- **Static network**
- **Intermediate**
- **Dynamic network**

**International passenger-kilometres**
- Growth between 2013 and 2030
  - Static: 57%
  - Intermediate: 115%
  - Dynamic: 149%

**Connectivity**
- Improvement between 2013 and 2030
  - Static: 13%
  - Intermediate: 1%
  - Dynamic: 15%
Bridging the connectivity gap

- Access
- Flight time
- Geography

- More airports connecting to hubs
- Network size and optimisation
- Distribution of opportunities
- Improve access (speed, modes)
First step towards a global connectivity indicator

Access to airports is a significant component of the travel journey in developing regions

Combined connectivity measure with fares and frequency

Regional connectivity: core issue in many regions
ITF
Transport Outlook 2016
Thank you for your attention