

Heathrow

KEEPING THE UK
CONNECTED:
DOMESTIC CONNECTIVITY
AT HEATHROW

MAY 2026





Contents

Foreword	4
Our commitments and policy asks	6
PART 1	7
Heathrow's role today	8
Heathrow's connections	8
The scale of Heathrow's domestic network by route	9
Connecting the UK to the world	10
Supporting tourism	12
Tourism spend generated by passengers on Heathrow's domestic connections	12
Domestic tourism	13
International tourism	14
How does Heathrow support domestic connectivity?	15
Supporting UK business	16
Capacity constraints are limiting domestic connectivity	18
PART 2	19
Heathrow's role in the future	20
Most viable potential routes with expansion	21
Connecting the world to the UK	22
The benefits of new connections	26
Our commitment to domestic connectivity	27

FOREWORD

Heathrow is the UK's Gateway to Growth. As the country's only hub airport, it connects the UK to global markets, supports international trade and investment, and helps drive tourism and economic growth across the nations and regions of the UK. Every year, millions of passengers and businesses rely on Heathrow to access opportunities around the world.

An important part of Heathrow's national role is its domestic connectivity network – the air routes linking Heathrow with airports across the UK and Crown Dependencies. Today, Heathrow connects destinations across the British Isles to London and to Heathrow's wider global network.

These connections matter. For many parts of the UK, particularly Northern Ireland, the Highlands and Islands of Scotland, and the Crown Dependencies, aviation is the only practical way to travel quickly and reliably to and from the UK and beyond. Alternative journeys by road, rail or ferry can take many hours. For the people and businesses who depend on these services, connectivity is not a luxury – it is a lifeline connecting them to the world.

Domestic air links through Heathrow also help spread the benefits of tourism and growth more evenly across the country. International visitors arriving at Heathrow travel onwards to historic cities, coastlines, cultural centres and national parks across the UK, supporting local businesses, hospitality and jobs in communities nationwide. Frontier Economics estimates Heathrow's existing domestic routes supported nearly £1.2bn in gross tourism spending across the UK from international and domestic travellers between October 2024 and September 2025. Behind that figure are families visiting loved ones, students returning home, tourists exploring the UK, and business travellers attending meetings, conferences and major events – each journey contributing to regional economies across the country.

Heathrow's UK connections are equally important for business and trade. From Welsh biltong and Cambridgeshire crisps to Yorkshire biscuits and Scotch whisky, Heathrow helps companies across the UK reach international customers and investors through its global network.

However, Heathrow has operated at full capacity for many years. In a constrained airport environment, airlines must make difficult choices about how to use scarce slots. Domestic routes can struggle to compete with long-haul services. As a result, some UK air links have been reduced or lost over time, while other parts of the country have never had a direct connection to the UK's hub airport.

Expansion would create the opportunity to change this. Additional capacity could provide the opportunity for airlines to restore lost routes, introduce new connections and increase frequencies on existing services, strengthening links between the UK's nations and the global economy.

Analysis from Frontier Economics, set out in this report, highlights the scale of that opportunity. It identifies a pipeline of potential new and reinstated domestic routes with evidence of underlying demand, including:

- Leeds Bradford
- Teesside
- Belfast International
- Liverpool
- Newquay

This report demonstrates that Heathrow is not simply London's airport; it is a national asset that supports communities, businesses and tourism across the whole UK. While airlines ultimately decide which routes they operate, Heathrow recognises the importance of maintaining strong domestic connectivity and continues to support it actively.

That is why Heathrow already supports domestic routes through measures such as our domestic passenger discount, which has saved airlines operating UK routes a cumulative £39 million since 2017, alongside partnerships such as the UK Government's GREAT campaign, promoting destinations across the UK to Heathrow's 84.5 million annual passengers. As we move forward with our expansion plans we will continue our work to support domestic connectivity and work towards a supportive policy environment to strengthen links between Heathrow and the nations and regions of the UK for the long term.



Nigel Milton
Chief Communications and Sustainability Officer

OUR COMMITMENTS AND POLICY ASKS

Heathrow has a strong track record of supporting domestic connectivity, recognising the vital role regional air links play in connecting communities across the UK, supporting local economies and enabling access to international markets.

Expansion provides an opportunity to strengthen this further, and we are committed to supporting domestic connectivity through a range of measures both within our control and through our wider asks of Government.

WHAT ARE WE DOING TODAY:

1

PROVIDING PER-PASSENGER DISCOUNT ON DOMESTIC PASSENGER CHARGES

2

PARTNERSHIPS TO PROMOTE DOMESTIC CONNECTIVITY INCLUDING THE GOVERNMENT'S GREAT CAMPAIGN

3

SUPPORTING PUBLIC SERVICE OBLIGATION ROUTES TO HEATHROW

POLICY ASKS:

1

CAMPAIGN FOR THE ABOLITION OF DOMESTIC AIR PASSENGER DUTY

2

WORK WITH GOVERNMENT AND AIRLINES TO ENSURE THE PUBLIC SERVICE OBLIGATION REGULATION IS FIT FOR PURPOSE

3

AMEND UK SLOT REGULATIONS PRIMARY ALLOCATION CRITERIA TO INCLUDE DOMESTIC CONNECTIVITY

PART 1 HEATHROW'S ROLE TODAY



HEATHROW'S ROLE TODAY

HEATHROW CONNECTS TO:

14 UK and Crown Dependency Destinations

ranging from major cities to harder to reach locations such as Inverness, the Isle of Man and the Shetland Islands as of May 2026.

Heathrow ensures that the UK's nations and regions are directly linked to international destinations, visitors, investors and trading partners.

230 Destinations in over 80 countries

170 unique one-stop global connections

BETWEEN OCTOBER 2024 AND SEPTEMBER 2025:

4.9 million passengers

travelled on domestic routes to and from Heathrow.

Approximately **£1.2** billion in tourism spend

was associated with journeys using Heathrow's existing UK routes across the country from both international and domestic travellers.

HEATHROW'S CONNECTIONS

CONNECTED TO THE UK

Between October 2024 and September 2025, 4.9 million passengers travelled on domestic flights from Heathrow. The number of flights vary by month but in September 2025 around 371 domestic flights operated each week.

In that period, Edinburgh was the busiest domestic route, with 1.1 million passengers and 77 weekly flights, followed by Glasgow with just under a million passengers and 69 weekly flights. Manchester and Belfast each carried just over 600,000 passengers.

On a typical day, this means 13,000 people travelling across the UK and Crown Dependencies for business meetings, music and sports events, and to connect with friends and family.



The [Newcastle to Heathrow] service is used extensively by passengers connecting through Heathrow to destinations across the world and brings thousands of visitors to the region each year, delivering significant benefits for the local economy.

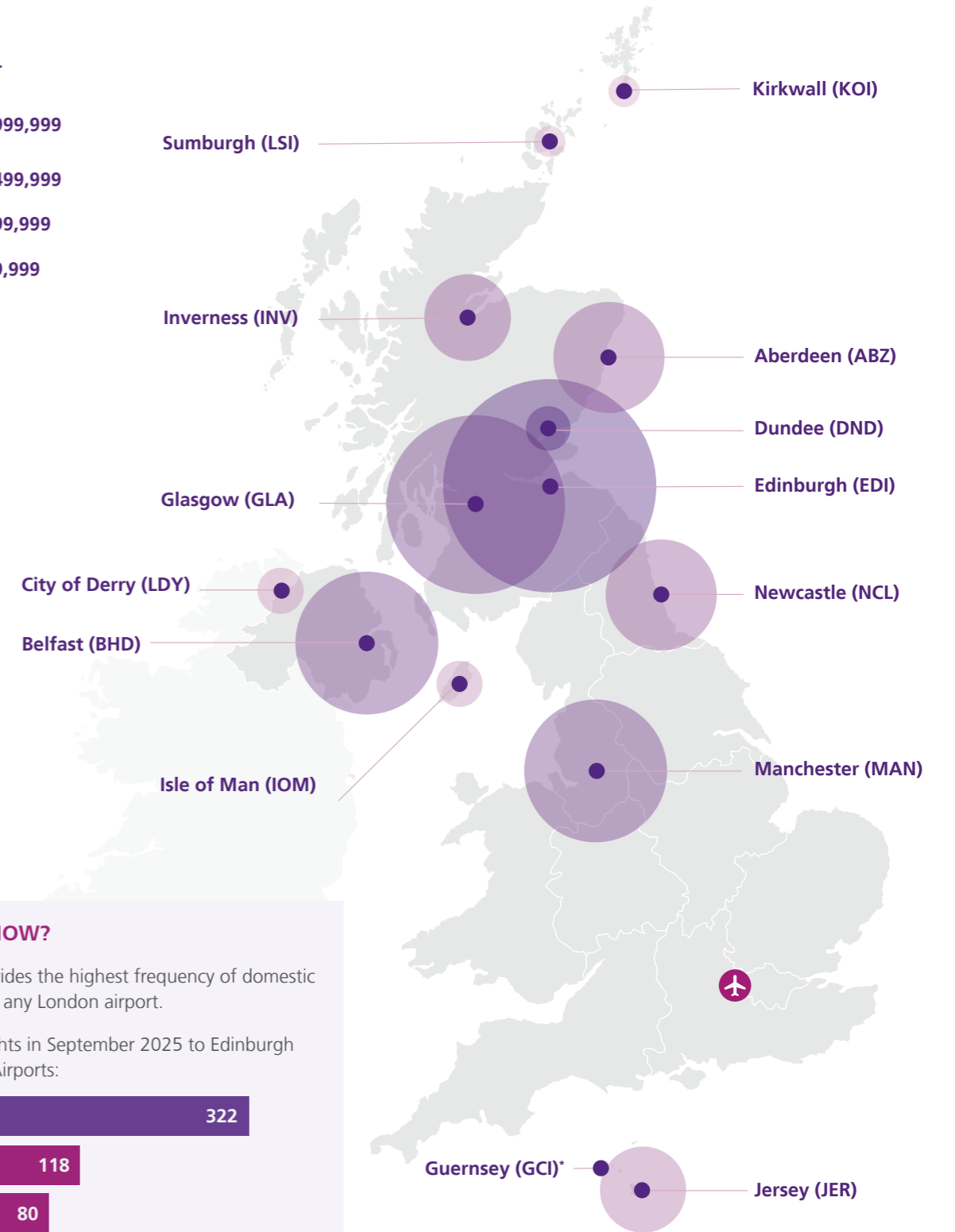
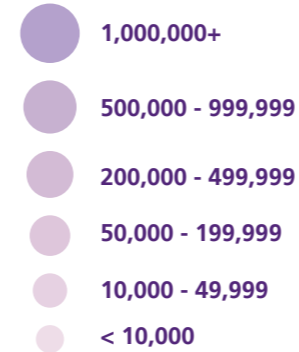
It is also vital for businesses that rely on strong connections to London and access to key global markets to grow their international presence.

This connectivity plays a critical role in supporting jobs, attracting investment and driving economic growth, ensuring the North East continues to thrive and remains a growing, must visit destination."

Alice Andreassen, Chief Corporate Affairs Officer, Newcastle Airport

THE SCALE OF HEATHROW'S DOMESTIC NETWORK BY ROUTE (OCTOBER 2024 - SEPTEMBER 2025)

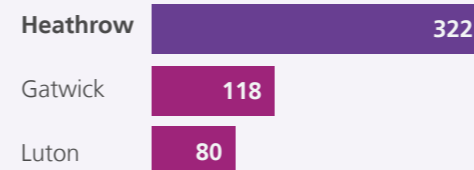
Passengers:



DID YOU KNOW?

Heathrow provides the highest frequency of domestic connections of any London airport.

Number of flights in September 2025 to Edinburgh from London Airports:



* This research was undertaken before the Heathrow-Guernsey route was introduced.

CONNECTING THE UK TO THE WORLD

Heathrow is the UK's only hub airport, linking nations and regions to the world. As a hub, Heathrow does not compete with other domestic airports. It complements them by acting as a central interchange to enhance connectivity between the UK and the rest of the world and fills the gaps by pooling domestic and international demand. Heathrow's domestic network ensures that businesses, tourists and families across the country can access the airport's extensive global route network, and vice versa.

Heathrow has been named the World's Most Connected Airport by aviation data analysts OAG for three years in a row. With Heathrow as a transfer point, passengers from across the UK can reach more than 230 destinations in over 80 countries. As part of the 'Six Continents Club', Heathrow offers direct flights to every inhabited continent, linking the UK with major global business centres such as New York, Singapore, Dubai and Tokyo, as well as fast-growing markets across Asia-Pacific, North America, the Middle East, Africa and Latin America. It also provides access to leading leisure destinations including Los Angeles, Cape Town, Bangkok and the Caribbean. New routes this year include Cancún, Dammam and St Louis.

For example, music lovers from Manchester can travel to Nashville with just one transfer at Heathrow - opening up access to one of the world's most iconic live music capitals. At the same time, energy specialists in Aberdeen can reach key Middle Eastern markets such as Dubai and Dammam with a single transfer, supporting the UK's renewables sector.

These Heathrow exclusive connections bring global markets within easy reach of the UK's nations and regions and underline Heathrow's role as the national hub, ensuring communities across the country are connected to both world-class leisure destinations and key centres of global commerce.

WHAT IS A HUB AIRPORT?

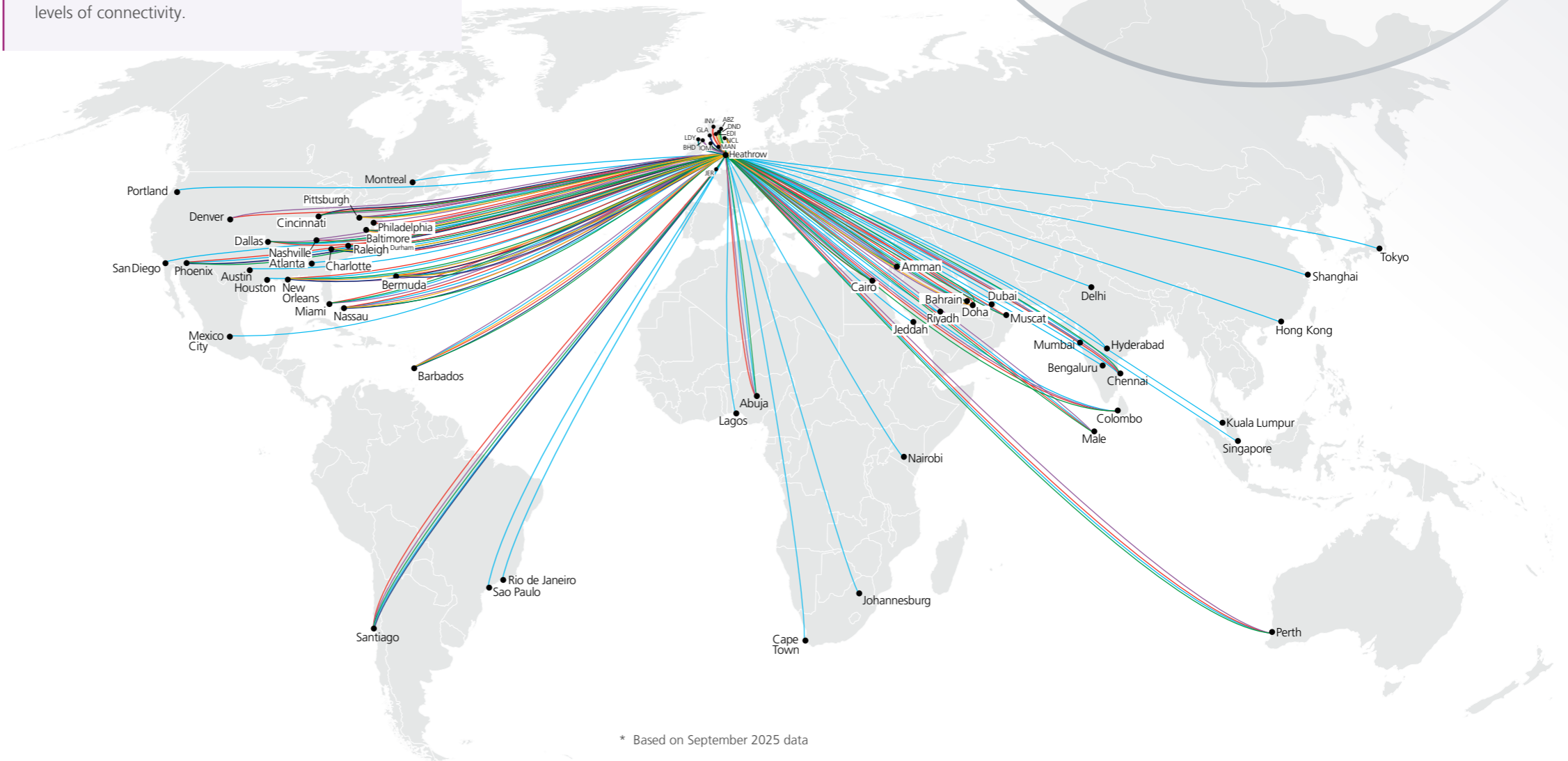
Hub airports connect passengers and cargo between multiple destinations via a central point (just like the hub on a wheel with spokes reaching out to many places) more efficiently than point-to-point routes.

Unlike point-to-point airports, which rely solely on local demand for direct flights between two destinations, hub airports bring together direct passengers, transfer passengers, and cargo. This allows airlines to fill aircraft more consistently and serve routes that would not be viable otherwise.

For passengers and exporters, a hub airport means direct, more frequent year-round connections to locations that could not otherwise sustain the required levels of connectivity.

THESE ARE CONNECTIONS THAT ARE ONLY AVAILABLE VIA A SINGLE STOP AT HEATHROW*

- Aberdeen
- Belfast
- City of Derry
- Dundee
- Edinburgh
- Glasgow
- Inverness
- Isle of Man
- Jersey
- Manchester
- Newcastle



* Based on September 2025 data

SUPPORTING TOURISM

Heathrow's domestic routes play a vital role in supporting tourism and business travel across the UK. Direct flights between Heathrow and the UK's regions and nations generate significant economic activity that remains within the UK economy, while international passengers connecting through Heathrow bring additional spending into regional communities.

TOURISM SPEND GENERATED BY HEATHROW'S DOMESTIC FLIGHTS IN THE UK AND CROWN DEPENDENCIES

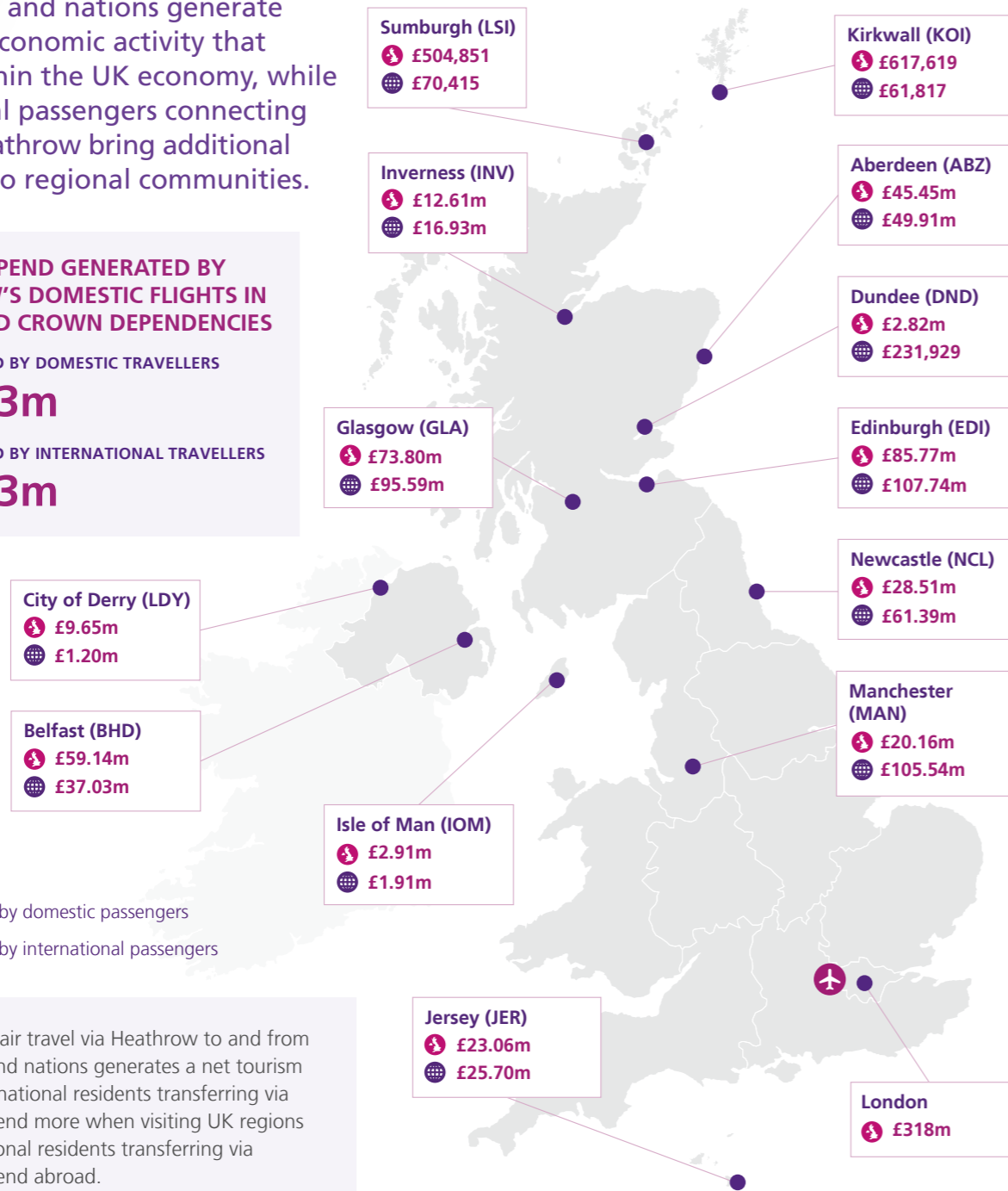
TOURISM SPEND BY DOMESTIC TRAVELLERS

£683m

TOURISM SPEND BY INTERNATIONAL TRAVELLERS

£503m

TOURISM SPEND GENERATED BY PASSENGERS ON HEATHROW'S DOMESTIC CONNECTIONS* (OCTOBER 2024 – SEPTEMBER 2025)



Key:
 🇬🇧 Tourism spend by domestic passengers
 🌐 Tourism spend by international passengers

International air travel via Heathrow to and from UK regions and nations generates a net tourism surplus. International residents transferring via Heathrow spend more when visiting UK regions than UK regional residents transferring via Heathrow spend abroad.

* Based on 2024 data from the Great Britain Tourism Survey (GBTS) published by VisitBritain for average spending for domestic visits. Frontier have assumed the same figure for Great Britain for Northern Ireland.

DOMESTIC TOURISM

Between October 2024 and September 2025, Frontier Economics found that domestic point-to-point routes via Heathrow generated approximately £1.2 billion in gross tourism spending within the UK and Crown Dependencies, based on average spending per trip. As well as spending in nations and regions, this also includes spending in London generated by UK residents travelling on Heathrow's domestic routes.

Domestic routes generate substantial economic activity into and out of London. Of the domestic tourism spending, £365 million flowed into regions and nations from London-based travellers and £318 million flowed into London from regional travellers. However, in every UK region served by Heathrow, Frontier's analysis indicates that inbound spending from London exceeded outbound spending to London in 2025. In practical terms, this means Heathrow's domestic connectivity results in a net flow of visitor spending from the capital into regional economies.

WHY DO WE NEED DOMESTIC AIR TRAVEL?

While road and rail provide important alternatives for some domestic journeys, aviation plays a distinct role in connecting more distant or less well-served area of the British Isles, including parts of Scotland, Northern Ireland and the Crown Dependencies. In some cases, such as journeys to islands, rail is not available at all or a car journey would take hours with the potential for delays due to traffic. In these cases, air services provide a practical, reliable, and quicker alternative.

For many passengers, domestic flights are part of a longer international journey, making onward connections simpler and more seamless than switching between road, rail or ferry, or a combination of these.

Ultimately, domestic air travel ensures that more remote parts of the country remain connected to the UK's hub airport and the wider global network it supports.

UK ROUTES WHERE AIR TRAVEL PROVIDES FASTER ACCESS TO CENTRAL LONDON (CHARING CROSS)*

DOMESTIC AIRPORT	DIFFERENCE BETWEEN THE FLIGHT JOURNEY TIME AND THE FASTEST ESTIMATED JOURNEY TIME BY CAR OR TRAIN
SHETLAND ISLANDS (SUMBURGH) (LSI)	17H 49M
KIRKWALL (KOI)	12H 43M
BELFAST GEORGE BEST (BHD)	9H 50M
DERRY (LDY)	6H 33M
INVERNESS (INV)	5H 08M
ABERDEEN (ABZ)	3H 53M
DUNDEE (DND)	2H 32M
ISLE OF MAN (IOM)	2H 32M
JERSEY (JER)	2H 31M
GLASGOW INTERNATIONAL (GLA)	1H 42M
EDINBURGH (EDI)	1H 18M
NEWCASTLE (NCL)	0H 09M

* This assumes distance to the train station or airport, as well as wait times

INTERNATIONAL TOURISM

International tourism is a major contributor to the UK economy and a central pillar of the Government's growth ambitions. International visitors travel to the UK via Heathrow for many reasons including heritage and cultural tourism, sporting events, music festivals, business travel, education, and visiting friends and relatives. Making it easy for these visitors to travel beyond London helps ensure that the benefits of international tourism are felt across the whole country, not concentrated in the capital.

Frontier Economics research shows that inbound transfer passengers – for example, tourists travelling from New York to Edinburgh via Heathrow – generate additional spending in regional economies. Between October 2024 and September 2025, international visitors transferring at Heathrow generated £503 million in spending in UK regions and nations. This spending supports hotels, restaurants, visitor attractions, and retail businesses in cities, towns and rural communities across the UK.

Without efficient onward domestic connections, a greater share of international visitor spending would remain concentrated in London or be routed via overseas hub airports. Heathrow's role as the UK's hub airport therefore ensures that global demand translates into tangible economic benefits across the UK.



Inverness Cathedral in Inverness, Scotland

SPOTLIGHT ON SCOTLAND

Over 2.8 million passengers travelled to and from Heathrow. The total tourism spending associated with passengers travelling to Scotland from and via Heathrow was estimated at £492 million from domestic and international visitors between October 2024 and September 2025.

In particular, Scotland's overseas tourism market has grown strongly in the post-pandemic period, with significant recovery and expansion driven by North American visitors.¹ Heathrow's role as the UK's primary transatlantic gateway has supported that growth by providing onward connectivity from key long-haul markets. By providing onward domestic connections to locations including Edinburgh, Glasgow, Aberdeen and Inverness, Heathrow ensures that record levels of long-haul demand from North America translate into tourism and spending in Scottish hotels, restaurants, and visitor attractions.

Research also shows that Scotland continues to be one of the UK's most popular destinations for domestic visitors, with domestic tourism accounting for a significant share of the country's overall tourism activity.² In 2024, Scotland recorded 10.6 million overnight trips by Great Britain residents. The most common reasons for these visits includes holidays and short breaks and visiting friends and relatives.³ Heathrow's domestic connections to key Scottish airports help facilitate this movement, reinforcing Scotland's position as a leading UK tourism destination.



For Scotland, Heathrow is a critical gateway to global markets, supporting nearly £500 million in tourism spend that relies directly on strong connectivity between Scotland and the UK's hub airport.

Connectivity is core to how businesses compete and win. Access to Heathrow enables Scottish businesses to reach international customers, secure new contracts, attract inward investment, and build the global relationships that drive long-term growth."

Charandeep Singh BEM,
Chief Executive of Scottish Chambers of Commerce

1 Visit Scotland - International tourism performance <https://www.visitscotland.org/research-insights/about-our-visitors/international/annual-performance-report>

2 Visit Scotland - Visitors to Scotland <https://www.visitscotland.org/research-insights/about-our-visitors>

3 Visit Scotland - Visitors to Scotland <https://www.visitscotland.org/research-insights/about-our-visitors>

HOW DOES HEATHROW SUPPORT DOMESTIC CONNECTIVITY?

There are a number of ways that Heathrow actively supports domestic tourism in the UK. These include:

THE DOMESTIC PASSENGER CHARGE DISCOUNT

Recognising the importance of domestic connectivity and the distinct commercial challenges these routes face, Heathrow has introduced targeted incentives to support UK regional routes

Domestic services are typically operated using smaller aircraft, which limits revenue potential and makes them more commercially challenging than many European routes. With fewer seats over which to spread fixed operating costs, these routes are more sensitive to cost pressures and fluctuations in demand. Heathrow has therefore stepped in to help ensure that vital regional connections remain commercially viable and the benefits of the UK's hub airport are accessible to communities across the UK.

Heathrow provides a £7.50 per-passenger discount on domestic origin and destination passenger charges compared to European routes. Transfer and transit passengers flying to UK regional destinations benefit from an additional £5.93 per-passenger discount. These discounts directly reduce the cost base of operating domestic services at Heathrow.

Since its introduction in 2017, the domestic passenger charge discount has delivered more than £39 million in cumulative savings to domestic routes, including £9.7 million to Edinburgh, £7.4 million to Glasgow, and £6.9 million to Belfast City. This represents sustained, long-term support for regional connectivity through the UK's hub airport.

Without this support:

- Ticket prices would be higher.
- Passenger volumes would be lower.
- Airlines would face higher operating costs on domestic services.

These measures demonstrate Heathrow's commitment to sustaining and strengthening domestic connectivity, ensuring that regional communities remain connected to London and to the airport's global network.



WORKING WITH THE GREAT CAMPAIGN

Heathrow has partnered with the UK Government's GREAT Campaign since 2016, using its position as the UK's main international gateway to showcase the best of the country to global audiences.

A big part of Heathrow's role is to provide free space to amplify the GREAT Campaign's work, helping to promote UK destinations and experiences to inbound visitors.

This has included everything from interactive activations for the 2018 Summer of Sport and regional landmark photo frames for passengers to engage with; to gate room takeovers showcasing Wales, Scotland and Northern Ireland, and celebrations of the UK's music scene. Most recently, the Starring GREAT Britain campaign, which showcases iconic film locations across England, Scotland and Wales, was featured in Heathrow's immigration halls.

These initiatives have helped reach millions of passengers as they travel through Heathrow and encourage inbound visitors to explore more of the UK beyond London.

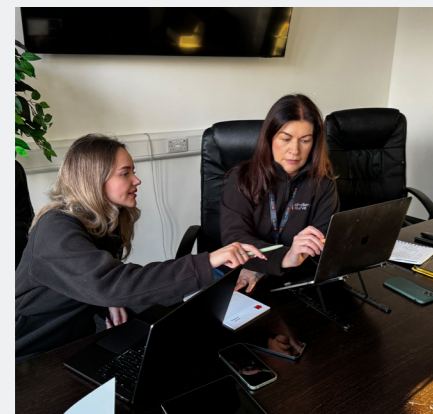


SUPPORTING UK BUSINESS

As the UK's largest port by value, Heathrow's connectivity plays a key role in enabling businesses from across the UK to share their products to the rest of the world, connecting them with customers, investors, and global opportunities that help drive growth and innovation.

Inverness and Cromarty Firth Green Freeport From Scotland to the World

Inverness and Cromarty Firth Green Freeport is one of Scotland's two green freeports, a major hub for offshore wind and advanced manufacturing, and is expected to create up to 11,000 jobs over the next 20 years. International investors regularly travel to the site via the Heathrow–Inverness route, connecting from Heathrow's global links across several investor regions, highlighting the importance of strong domestic connections for flagship regional infrastructure projects like this.



ChallengeCurve From Northern Ireland to the World

ChallengeCurve is a Derry-based technology company that provides quality assurance and software testing for business-critical applications, including mobile banking and payment platforms. The company established its main operations hub in Derry in 2021, creating highly skilled digital jobs in a region that has historically seen limited inward investment. Strong connectivity to Heathrow has been an important factor in ChallengeCurve's growth, with regular direct flights between City of Derry Airport and Heathrow enabling close collaboration with partners, including work on projects that support Heathrow's operations and enhance the customer experience.

Sheriff's Biltong From Wales to the world

Sheriff's Biltong is a multi-award-winning Welsh charcuterie business dedicated to producing high-quality, handcrafted biltong using locally sourced, sustainable ingredients. Based in the heart of Swansea, Sheriff's Biltong has built a strong regional presence and is now poised for growth into national and international markets, supported by Heathrow's global connectivity to markets such as Dubai.



Cartwright & Butler From Yorkshire to the world

Cartwright & Butler is a Yorkshire based, family-owned British specialty food and beverage brand known for its premium teatime luxuries. The brand has built a strong international presence with products distributed to over 40 countries worldwide. In 2025 alone Cartwright & Butler exported more than 6,500 products, to destinations such as Singapore and India. As well as helping the business export, Heathrow's travel retail has become a critical growth platform for Cartwright & Butler, enabling the brand to showcase British food gifting to a global audience.



Savoursmiths From Cambridgeshire to the world

Savoursmiths produces premium crisps made from British potatoes grown on a family farm in East Anglia and combined with high-quality ingredients from around the world – a totally new take on a traditional snack. Heathrow plays a vital role in sending samples to customers, which are key to building relationships with distributors and retailers and opening the door to new markets. Today, Savoursmiths exports across the world including North America, Italy, the Netherlands, Spain, Hong Kong, Singapore, the UAE, Kuwait, Saudi Arabia, and beyond.



CAPACITY CONSTRAINTS ARE LIMITING DOMESTIC CONNECTIVITY

Heathrow operates with two runways and is capped at 480,000 flights per year. The airport has been operating at or near full capacity for two decades.

In a full airport, airlines must make choices about how to allocate scarce slots. Decisions about which destinations to serve are made by airlines based on their own commercial strategies and network priorities – this is not something Heathrow determines. At Heathrow, there is a general pattern of airlines deciding to reduce frequencies on domestic connections in order to free up slots to fly to more profitable long haul destinations instead. This reflects the trade-offs airlines face when operating at a capacity-constrained hub.

In some cases, airlines operate UK regional services using temporary slots leased from other airlines because they are unable to secure permanent slots of their own. This can leave routes vulnerable if those leased slots are later reclaimed by the original holder, creating a higher risk that some domestic services could be reduced or withdrawn altogether.

This is visible in long-term trends. Domestic flight numbers have declined from approximately 25,000 per year in 2010 to around 20,000 in 2025. Several domestic routes have been withdrawn over time, including services to Teesside, Leeds Bradford, and Newquay. When routes are withdrawn, communities lose direct access to the UK's hub airport, making travel more complex and time-consuming and, in some cases, pushing passengers to use overseas hubs instead.

Many of the airports not currently directly connected to Heathrow instead link to overseas hubs such as Amsterdam Schiphol and other major European airports. When UK and nations rely on overseas hubs for international connectivity, transfer traffic and the associated economic benefits are seen outside the UK.

In principle, if Heathrow were not capacity constrained, airlines would have the flexibility to add more routes, including the ones that have been withdrawn in recent years. With additional capacity at Heathrow, airlines would have greater choice in how they allocate slots, including the ability to maintain existing domestic services, reinstate previous routes and introduce new UK connections. For communities, this would mean better access to global destinations, greater choice of flight times, and more reliable connections to international markets. This means that expanding Heathrow could enable airlines to reinstate some of these domestic services and add new routes to ensure that the UK can maximise the benefits of aviation.

PART 2 HEATHROW'S ROLE IN THE FUTURE



HEATHROW'S ROLE IN THE FUTURE

With additional capacity, Heathrow would be able to support more domestic routes and connect more parts of the UK directly to the country's global hub. Analysis undertaken by Frontier Economics identifies a number of potential new connections where there is evidence of underlying demand.

In many cases, these are routes that were previously served by Heathrow, or where passengers already travel via other airports or overseas hubs to reach global destinations. What this means in practice is that people in these areas are already making these journeys but often in less direct, less convenient ways. Expansion would make it possible to bring those journeys back through Heathrow, improving connectivity and keeping more of the economic benefits within the UK.



There are obvious benefits that would come from unlocking capacity at Heathrow. With global demands and competition higher than ever, UK businesses including those in Greater Manchester, need to have increased accessibility to overseas markets and easier ways to connect.

As the UK's only global hub airport, increasing the number of flights to and from Heathrow would significantly enhance the country's competitiveness. Heathrow's plans demonstrate that even incremental growth in domestic routes, alongside the introduction of new UK destinations, would deliver substantial economic and connectivity gains. However, without the required expansion, these opportunities just cannot be realised. There is a clear and compelling case and demand for growth.

Chris Fletcher, Executive Director of Skills Policy, Greater Manchester Chamber of Commerce

HOW DO AIRLINES CHOOSE WHICH ROUTES TO FLY?

Airlines – not airports – decide which routes to operate. These decisions are based on a range of commercial and operational factors, including:

- **Passenger demand** – whether enough people are likely to travel on the route
- **Profitability** – expected revenue compared to operating costs
- **Aircraft availability and size** – matching the right aircraft to the route
- **Competition** – including alternative airports, airlines, and modes of transport
- **Network strategy** – how a route fits into an airline's wider global network
- **Slot constraints** – particularly at busy airports like Heathrow

At capacity-constrained airports such as Heathrow, airlines must make careful choices about how to use their limited slots. In many cases, this means prioritising long-haul routes, which can generate higher returns, over domestic services.

Importantly, Heathrow does not decide which destinations are served. While the airport can support domestic connectivity through incentives and partnerships, which we do, the final decision on whether to start, continue, or stop a route rests entirely with airlines.

MOST VIABLE POTENTIAL ROUTES WITH EXPANSION

- Most evidence of being a viable new connection
- Some evidence of being a viable new connection



ESTIMATING DEMAND: AN ART NOT A SCIENCE

Airlines will only operate new routes where they expect them to be profitable. While costs can be estimated with relative certainty, revenues depend on demand. Airlines can model potential demand using a range of techniques, but the true level of demand is only revealed once a route begins operating.

Frontier's approach identifies where there is consistent evidence of underlying demand based on a number of factors. They applied an evidence-based approach to assessing demand, analysing existing passenger flows, catchment and economic data, and key demand drivers such as population, distance and GDP per capita. This was supported by benchmarking comparable routes and applying established transport economics principles to identify where new routes are most likely to be viable.



CONNECTING THE WORLD TO THE UK

From major regional cities to coastal and island destinations, these locations reflect the range of the UK's tourism and economic offer.

Leeds Bradford and Liverpool provide access to large urban centres with established cultural, sporting and commercial strengths, while also serving as gateways to nearby areas such as the Yorkshire Dales and Lake District. Teesside offers access to the North East's coastline and the North York Moors, alongside a region with a strong industrial base and ongoing regeneration. Newquay provides access to Cornwall's beautiful beaches.

Beyond these, a number of other destinations – including Humberside, Exeter, Land's End, Cardiff, Glasgow Prestwick and Oban – also show evidence of being viable connections.

These locations broaden access to different parts of the UK, from the South West's coastline through Exeter and Land's End, to cities such as Cardiff with strong cultural and economic roles. Others, including Humberside, provide access to England's east coast, while Glasgow Prestwick and Oban serve as gateways to Scotland's west coast and islands.



Strong domestic air links between the North East and Heathrow Airport are vital for the region's competitiveness and future sustainable growth.

Connections from both Newcastle International Airport and Teesside International Airport to Heathrow are not simply about travelling to London – they are about connecting North East businesses, exporters, investors and visitors to global markets and opportunities.

As the UK's only hub airport, Heathrow is a key national asset and plays a critical role in linking the nations and regions of the UK to the wider world. For the North East, maintaining and strengthening these connections is essential to supporting trade, inward investment, tourism and economic growth."

**John McCabe, Chief Executive,
North East Chamber of Commerce**



Direct connectivity between Leeds Bradford and Heathrow would deliver significant benefits for Yorkshire's businesses, exporters and tourism sector. Yorkshire has a huge amount to offer international visitors and global investors, and reinstating access to the UK's hub airport would play a vital role in connecting Yorkshire to the world. It would make it easier for global markets, visitors and investment to reach the region, while strengthening Yorkshire's links to international opportunities. Heathrow expansion presents a significant opportunity for Yorkshire, and the sooner it can be delivered, the better."

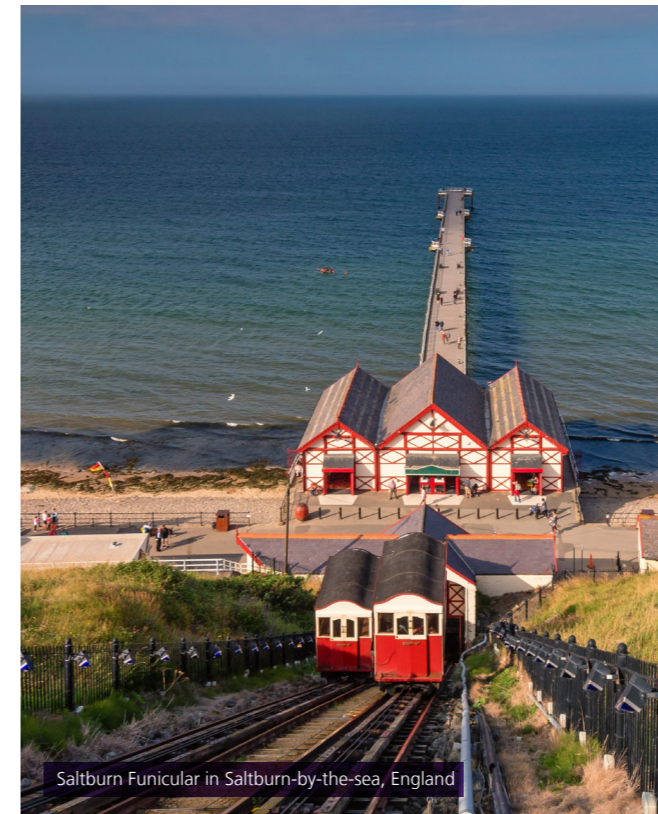
**Vincent Hodder, Chief Executive Officer,
Leeds Bradford Airport**



River Aire in Leeds, West Yorkshire, England



Bamburgh Castle in Bamburgh, England



Saltburn Funicular in Saltburn-by-the-sea, England



Micropore Technologies is a Redcar-based business specialising in advanced membrane technology that precisely controls droplet and particle formation, with applications ranging from drug delivery and vaccines to food products and cosmetics. We export to over 30 countries and rely on strong international connections. We previously benefited from direct access to Heathrow via Teesside, but the loss of that route has made exporting and travel more complex and time-consuming, while also making it harder to attract international visitors. Some are discouraged from travelling altogether, impacting both our business and the region's reputation. Expanding Heathrow, and reintroducing a Heathrow–Teesside connection, would help companies like ours across the North East trade internationally, attract global partners and support regional growth."

Jen Sykes, Head of Quality and Operations, Micropore Technologies



Cornwall Airport Newquay supports infrastructure development that enables true regional connectivity. The proposed third runway at Heathrow has the potential to deliver meaningful hub access for regions like Cornwall — but only if there is a clear and sustained commitment to slot accessibility and affordability for regional carriers and regional routes. Direct and reliable connectivity to a UK hub is vital for Cornwall's economy, inward investment, and the future of sustainable regional aviation."

Amy Smith, Managing Director, Cornwall Airport Newquay



Land's End in Cornwall, England



River Lagan in Belfast, Northern Ireland, England



Royal Liver Building in Liverpool, England



Teessiders are proud of what our area has to offer to the world – from breathtaking beauty spots like Roseberry Topping, to the stunning North East coastline and North York Moors on our doorstep. A restored Teesside-Heathrow route would help more visitors experience everything our area has to offer, and for our fantastic businesses, including our growing clean energy, advanced manufacturing and digital sector, they would benefit from strengthened access to international markets, investment and trade opportunities via Heathrow"

Phil Forster, Managing Director, Teesside Airport



Infinity bridge in Stockton-On-Tees, England

THE BENEFITS OF NEW CONNECTIONS

Expanding Heathrow’s domestic network would bring real, tangible benefits to the nations and regions these routes would serve.

A service operating just three times per week could carry more than 20,000 passengers each year, rising to over 50,000 passengers for a daily service. That means more visitors, more business travel, and more opportunities for local economies to grow.

As well as offering communities greater access to London and the world, improved connectivity to Heathrow would make these destinations significantly more accessible to both domestic and international travellers, turning what can currently be lengthy, multi-leg journeys into seamless trips. This not only broadens choice for tourists seeking new UK destinations, but also helps unlock tourism potential, support local economies and bring more of the UK’s diverse offer onto the global stage.

The impact on tourism is particularly significant. A new route operating daily could generate more than £26.7 million in domestic tourism spending, alongside around £40.2 million from international visitors travelling through Heathrow to regional destinations. This means more people will be able to take trips that might not otherwise happen, increasing both visitor numbers and the amount spent locally.

At the same time, these routes would give businesses in currently unserved locations more direct access to global markets. Whether exporting goods, meeting clients, or attracting investment, better connectivity makes it easier for regional economies to grow and compete internationally.

By strengthening links between the UK’s nations and regions and the global economy, an expanded domestic network would help ensure that all parts of the country can fully benefit from Heathrow’s role as the UK’s hub airport.

OUR COMMITMENT TO DOMESTIC CONNECTIVITY

The research from Frontier has shown the critical role Heathrow already plays in connecting the UK’s nations and regions to each other and to the world, and the scale of additional connectivity that could be unlocked with expansion.

Today, Heathrow’s domestic network supports millions of journeys, enables significant tourism spending across the UK, and ensures that regional economies can access global markets. Expansion provides an opportunity not only to add new domestic connections, but also to strengthen Heathrow’s long-term commitment to regional connectivity.

Alongside our existing initiatives such as providing a Domestic Passenger Discount for passengers on UK routes and partnering with the Government’s GREAT campaign to showcase the best of the UK, Heathrow will continue to work with airlines to support Public Service Obligation (PSO) routes, which play an important role in protecting essential air links for communities where alternative transport options may be limited.

Heathrow will continue to play our part in advocating wider policy reforms to strengthen and protect this connectivity across the UK. This includes exploring how domestic Air Passenger Duty could be reformed, which would reduce the cost of flying within the UK for passengers and improve the economics of operating regional routes for airlines. Heathrow will also work with Government and airlines to ensure the PSO framework is fit for purpose and able to respond more effectively to changing regional connectivity needs. In addition, Heathrow will advocate for domestic connectivity being explicitly recognised within the primary slot allocation criteria, helping to ensure it is a considered criteria for access to Heathrow’s global network for communities across the country.

These measures will help ensure expansion delivers opportunities for all of the UK.

ANNUAL ESTIMATED SPENDING AT NEW CONNECTION



Heathrow

Heathrow Airport
The Compass Centre, Nelson Road
Hounslow, Middlesex, TW6 2GW

✉ Policy@heathrow.com

🌐 heathrow.com