



**BRITISH AIRWAYS**

The Importance of Night Flights to  
UK Connectivity & Global Transport  
- An airline perspective

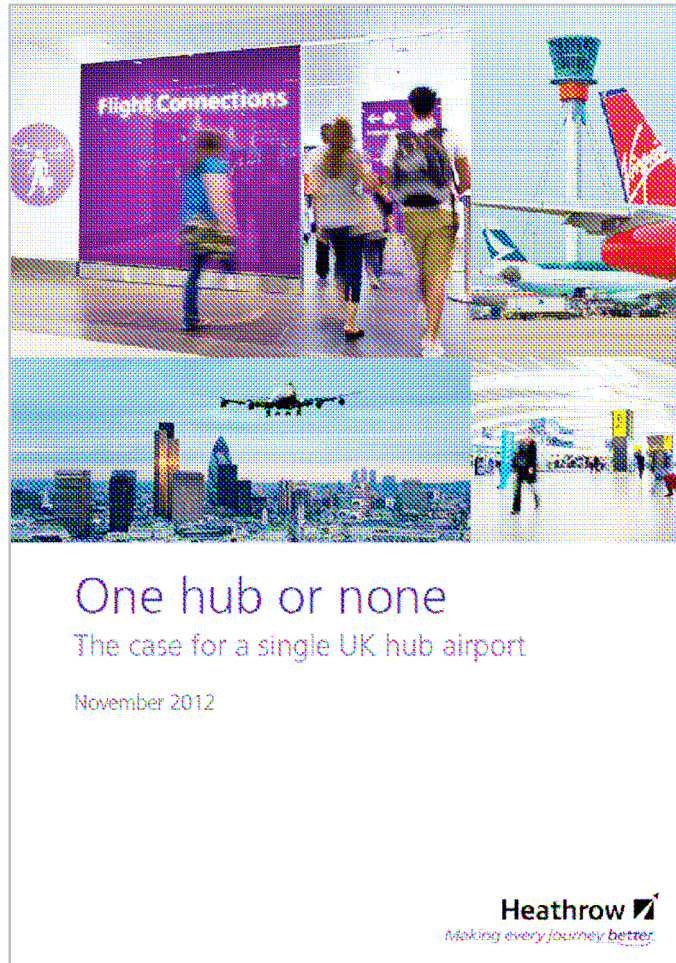
23<sup>rd</sup> January 2013

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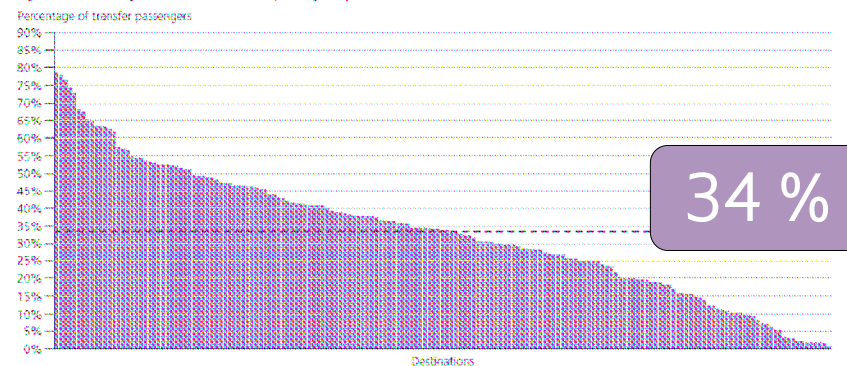


# The Hub



- Local passenger demand supplemented by passengers transferring at the hub.
  - Enables airlines to operate routes and frequencies that local demand alone could not support
  - Inter-connected and mutually supportive schedule
- = Connectivity**

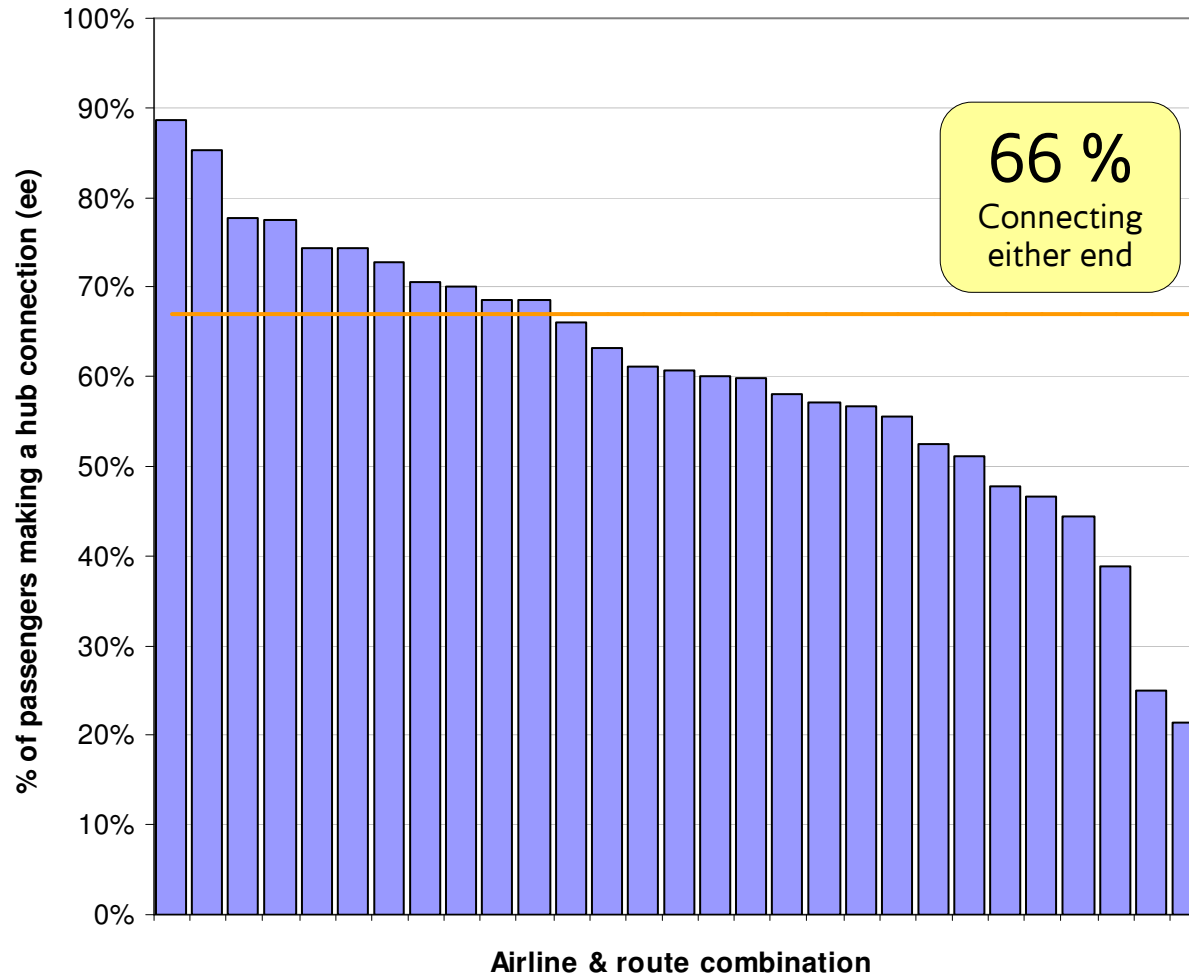
Figure 3.5: Percentage of Heathrow's transfer passengers by destination<sup>5</sup>



<sup>5</sup> CAA Passenger Survey Data, 2011



# Theory in action: LHR early arrivals



## Routes

Accra  
Abu Dhabi  
Bahrain  
Bangkok  
Mumbai  
Boston  
New Delhi  
Dubai  
Hong Kong  
Washington  
Jeddah  
Johannesburg  
Kuala Lumpur  
Lagos  
Nairobi  
Singapore  
Sydney  
(17)

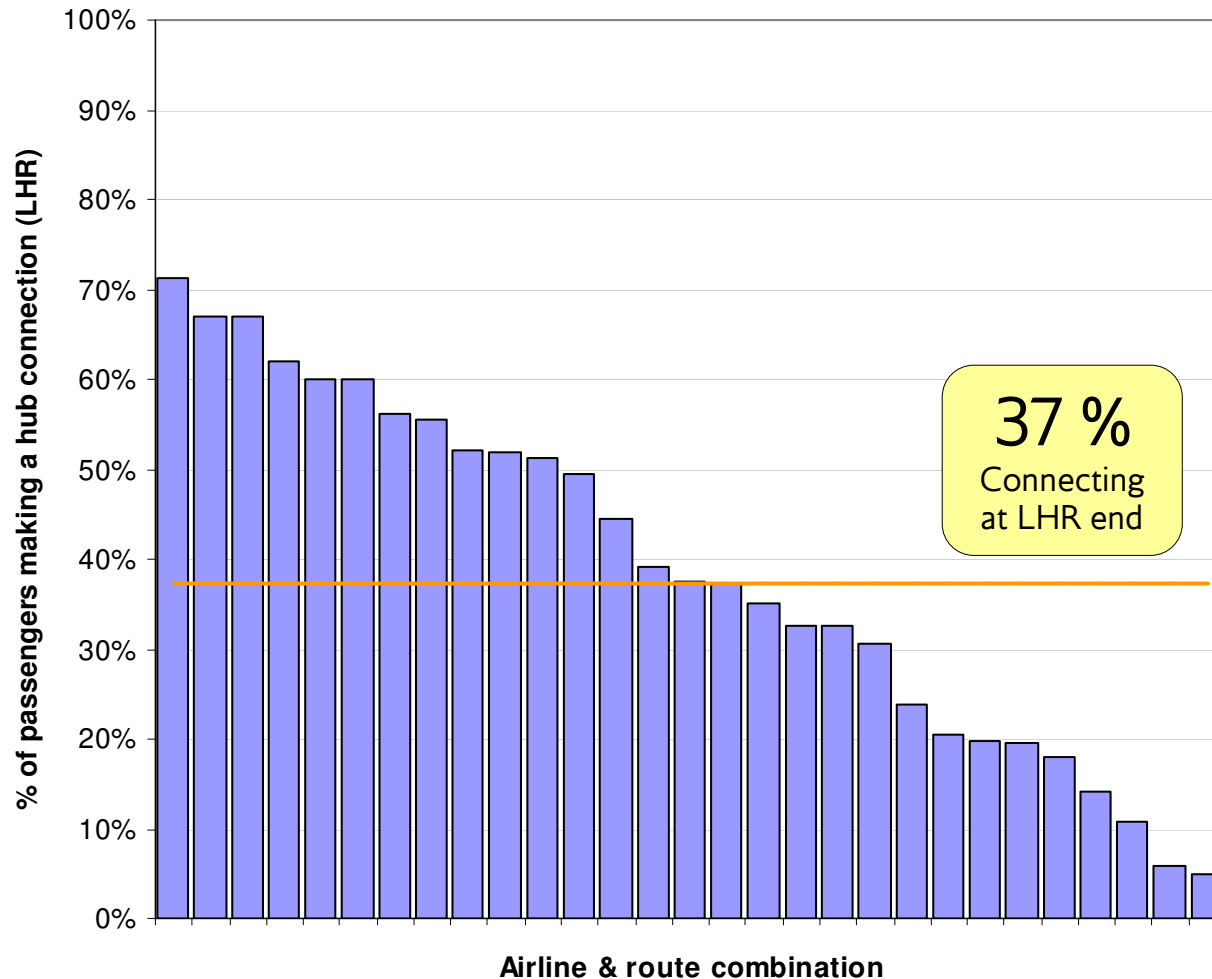
## Airlines

BA  
Delta  
Gulf  
Jet  
Kenyan  
Malaysian  
Qantas  
Saudi  
Singapore  
United  
Virgin  
(11)

BA analysis of CAA passenger survey data for 2011



# Theory in action: LHR early arrivals



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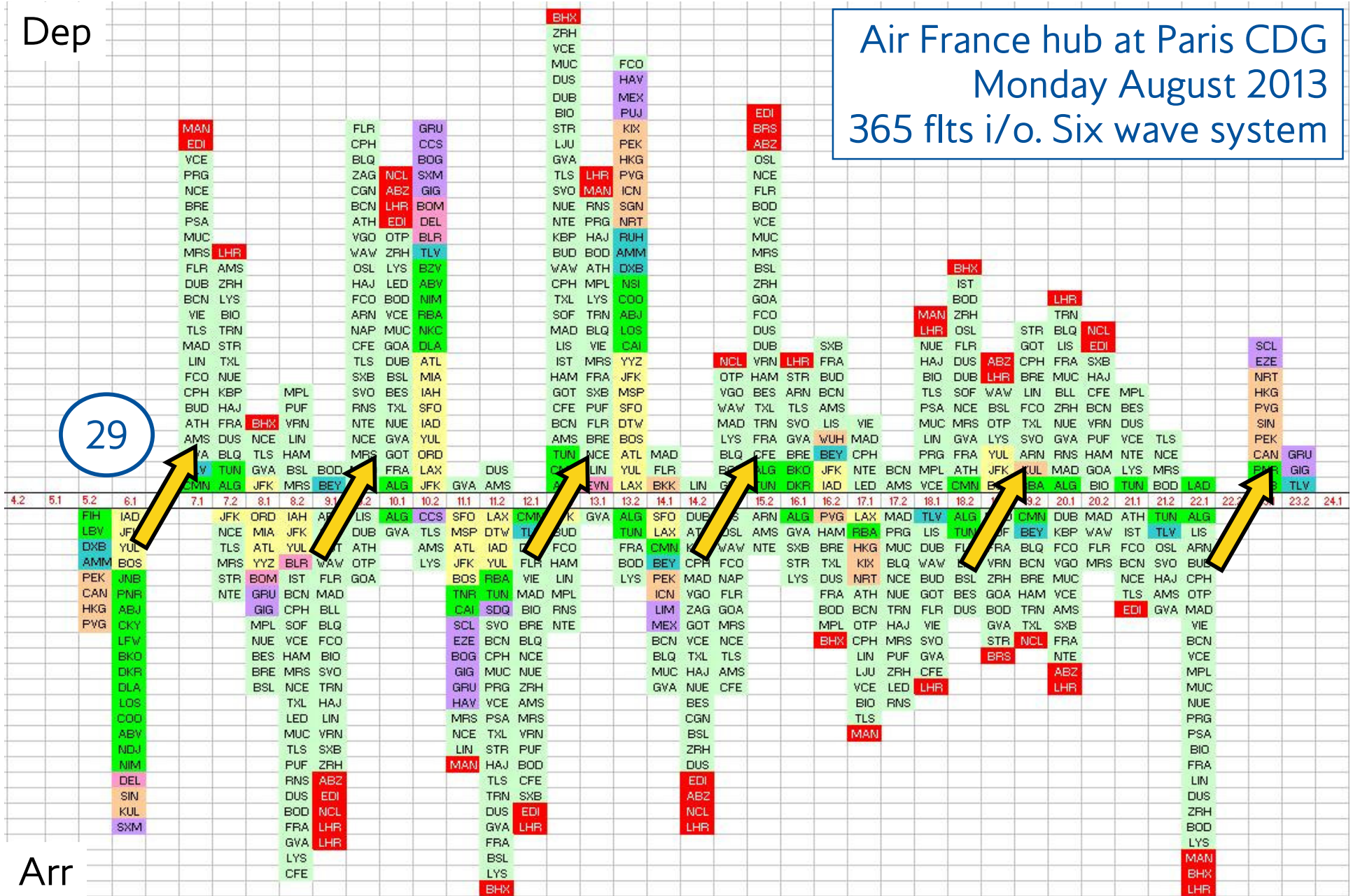
BA  
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Qantas  
Saudi  
Singapore  
United  
Virgin  
(11)

BA analysis of CAA passenger survey data for 2011



Dep

Air France hub at Paris CDG  
Monday August 2013  
365 flts i/o. Six wave system



Arr



Dep

All at LHR  
Friday August 2013  
671 flts i/o.

4.2	5.1	5.2	6.1	6.2	7.1	7.2	8.1	8.2	9.1	9.2	10.1	10.2	11.1	11.2	12.1	12.2	13.1	13.2	14.1	14.2	15.1	15.2	16.1	16.2	17.1	17.2	18.1	18.2	19.1	19.2	20.1	20.2	21.1	21.2	22.1	22.2	23.1	23.2
HKG	JNB	NBO	BOS	IAD	IAH	BOM	CPH	BOS	EWR	BWI	BOS	ATL	SFO	IAH	LAX	DEN	PHX	YVR	DXB	SAN	LAS	LAX	EBB	DAR	TBS	BCN	TIF	ARN	CPH	BOS	TLV	AMM	AMS	BCN	AMS	TLV	FCO	
LOS	DXB	EWR	JFK	JFK	AMS	FRA	JFK	IAD	DFW	MIA	EWR	YVR	TLV	SEA	BLR	SFO	YYC	PVG	ABZ	NRT	ATH	GVA	AMS	ARN	BRU	BOM	BSL	FCO	JFK	DME	ATH	BGO	FCO	BCN	AMS	BRU	MRP	
SIN	RUH	PHL	JFK	YYZ	BSL	GVA	YYZ	JFK	ORD	IAD	CDG	MAA	CAI	HYD	KWI	JED	GIG	ICN	AMS	BRU	IST	ATH	FCO	CPH	CDG	HEL	FRA	AMS	FCO	BCN	CDG	GVA	BRU	MRP	MAN	GLA		
HKG	HKG	ACC	MIA	GRU	CDG	MUC	BCN	BEY	LAX	PHL	JFK	DUS	BCN	GYD	BGO	DEL	BLQ	ARN	PEK	BCN	BUD	NCE	CDG	KBP	HAM	DME	OSL	GVA	ARN	LIN	BUD	DUB	MRS	NCE	GLA	MAN	GLA	
SIN	BKK	ORD	JFK	DUS	TXL	LIN	ARN	YUL	ATH	HND	GVA	CPH	AMS	CDG	BCN	LIS	BCN	DUB	CPH	DUB	ORY	OSL	LIN	LED	DUS	OTP	LUX	BLQ	STR	CPH	FRA	MUC	OSL	MAN	GLA	ORD		
DXB	EZE	CPT	DXB	HAM	MAN	LYS	BLQ	FCO	BRU	AMS	IST	FRA	BRU	FRA	BSL	MRP	CDG	GIB	FCO	MAD	SOF	ZAG	MUC	EDI	FRA	TLV	EDI	BRU	TXL	DUS	LIS	TXL	GLA	ORD	MUC	MAN		
HKG	JFK	JNB	AUH	ZRH	STR	NCE	DUB	PRG	BUD	BHD	LIS	HAJ	GOT	GVA	FCO	WAW	DUS	KBP	FRA	RTM	VIE	ZRH	PRG	GLA	GVA	CGN	CDG	HAM	ZRH	GOT	MAD	ABZ	LBA	MUC	MAN	GLA		
KUL	YYZ	AUH	DUS	BHD	MIA	ORY	HEL	MAN	DUB	EDI	OTP	MUC	HAM	LYS	NCE	BHD	GVA	LIN	HAM	ABZ	EDI	BHD	EDI	STR	MAD	DEL	DEL	IST	BHD	HAJ	SYG	BHD	DUB	IST	LIS	MAN		
DXB	HKG	BAH	BKK	NCL	DUB	ABZ	OSL	YHZ	ORY	AMS	ZRH	EDI	LIN	MRS	OSL	GLA	LCA	NCE	PRG	GLA	CDG	MAN	LBA	BOM	MRS	COG	FCO	LYS	MAN	NCE	GLA	EDI	MAD	LIS	MAN	GLA		
SIN	BOS	DEL	SFO	DFW	ADD	EDI	TLV	MLA	RTM	FRA	ABZ	YVR	LUX	STR	PRG	CDG	MUC	PSA	TXL	ATH	HKG	NCL	HEL	PEK	TXL	BHD	LIN	MAD	DUB	PRG	NCL	JFK	FRA	DOH	MAN	GLA		
ORD	JNB	BRU	BOS	JFK	MAD	GLA	VIE	WAW	LBA	EDI	GLA	BOM	MAD	SVG	TLV	AMS	ZRH	VCE	EDI	FRA	MAD	CMN	DUB	AMS	ZRH	SNN	BKK	MUC	DXB	RTM	ATH	DUB	DOH	MAN	GLA	ORD	MAN	
JED	DME	IAD	ORD	FRA	YYZ	EDI	ARN	MAN	JFK	MAN	KEF	TXL	BEG	TXL	TXL	MAN	ABZ	MAN	ABZ	MAN	NRT	LIN	ORK	AMS	ABZ	DXB	DUB	MRP	KEF	VIE	YYZ	ORK	WAW	MAN	GLA	ORD		
IAD	HAJ	YUL	HAM	LIN	GLA	SVG	NCL	MIA	ATH	DUS	MIA	DUS	MIA	MUC	VIE	TLV	CGN	BHD	HEL	CAI	AMS	FRA	MAD	FRA	MAN	MAD	AMS	NCE	TAS	ABZ	GYD	WAW	MAN	GLA	ORD	MAN		
BOM	CDG	TXL	ORK	CGN	IAH	YOV	PMI	DFW	DFW	ARN	ABZ	LAX	BHD	FCO	CPH	AMS	MUC	ICN	ZRH	DUB	DUS	MLA	ORY	MUC	EDI	DUS	ZRH	MAN	GLA	FCO	BCN	AMS	BRU	MRP	MAN	GLA	ORD	
RDU	ATL	GVA	MUC	JFK	YYZ	MIA	ATL	LIS	EDI	MAN	YEG	DUB	CAN	SIN	GVA	WAW	AMS	ICN	AUH	FRA	TXL	WAW	EDI	CDG	GVA	VIE	MAN	GLA	FCO	BCN	AMS	BRU	MRP	MAN	GLA	ORD		
YYT	JFK	ORD	VIE	ORD	CDG	ORD	MSP	EDI	NCL	YVR	DXB	SNN	MAD	DXB	ZRH	CPH	KWI	DOH	MLA	HAM	ZRH	ABZ	EWR	HEL	CAI	BRU	MAN	GLA	FCO	BCN	AMS	BRU	MRP	MAN	GLA	ORD		
BAH	AMS	CLT	CPH	HEL	DUB	YYC	DXB	STR	SOF	BAH	GIG	NRT	KUL	TUN	DUS	ARN	ACC	GVA	ZAG	EDI	HKG	OTP	IAD	MAN	GLA	FCO	BCN	AMS	BRU	MRP	MAN	GLA	ORD	MAN	GLA	ORD		
NBO	FRA	ABZ	JFK	SNN	YYZ	DOH	LCA	MAD	VIE	GRU	NRT	LAX	BRU	GOT	PVG	CPH	LCA	SVG	ABZ	MAN	GLA	FCO	BCN	AMS	BRU	MRP	MAN	GLA	FCO	BCN	AMS	BRU	MRP	MAN	GLA	ORD		
DXB	ZRH	EDI	BHD	MAD	FCO	SVG	DUB	FRA	AMS	AMS	KHI	VKO	LDS	PVG	DEL	OSL	CMB	MUC	SVG	ABZ	JFK	EWR	MAN	GLA	FCO	BCN	AMS	BRU	MRP	MAN	GLA	ORD	MAN	GLA	ORD			
JNB	MRU	MAN	DUB	JFK	ATL	IAH	ORK	HAM	KHI	VKO	LDS	PVG	DEL	OSL	CMB	MUC	SVG	ABZ	JFK	EWR	MAN	GLA	FCO	BCN	AMS	BRU	MRP	MAN	GLA	ORD	MAN	GLA	ORD	MAN	GLA	ORD		
EWR	SIN	ORD	AMS	MUC	DTW	LAX	AUH	MUC	AMM	LCG																												
IAH	RUH	EWR	FRA	TXL	DUB	LAX	FRA	BEY	IST																													
JFK	EWR	OSL	ZRH	GVA	DTW	LAX	FRA	BEY	IST																													
JNB	IAD	BRU	EWR	LAX	ZRH	SFO																																
BOM	JFK	EWR	IAD	DOH	CPH	SVG																																
JFK	EWR	IAD	DOH	CPH	SVG																																	

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BA analysis of OAG schedule data for Aug 2013



BATA Night Flights summit: 23 Jan 13

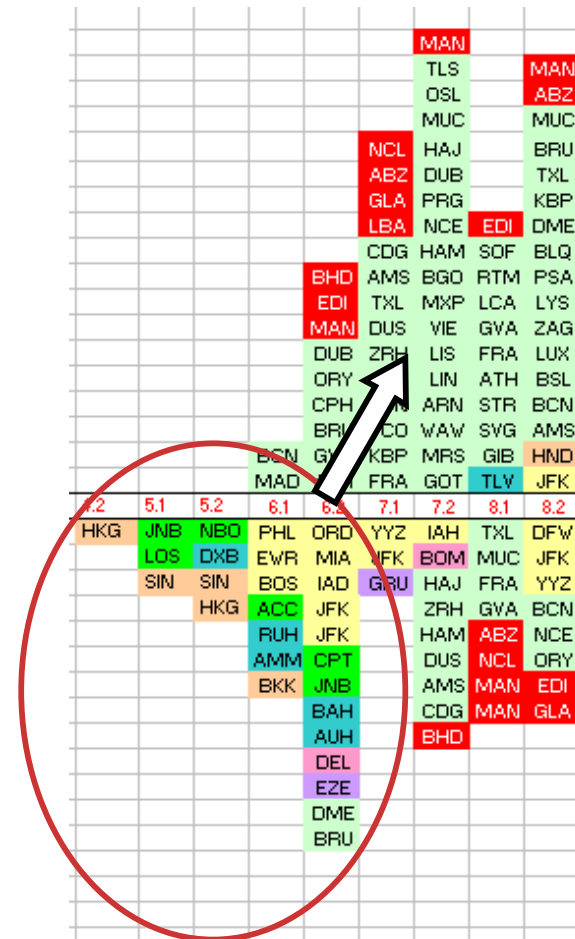


# BA Network structure

- Night flights are scheduled to depart the outstation late PM to arrive early AM
- Provide high feed volume onto early shorthaul departing flights

## Without early arrivals ?

- Removes critical feed onto 1<sup>st</sup> wave departures
- Reducing route viability for both longhaul and shorthaul
- Weakens BA network
- Weakens UK connectivity

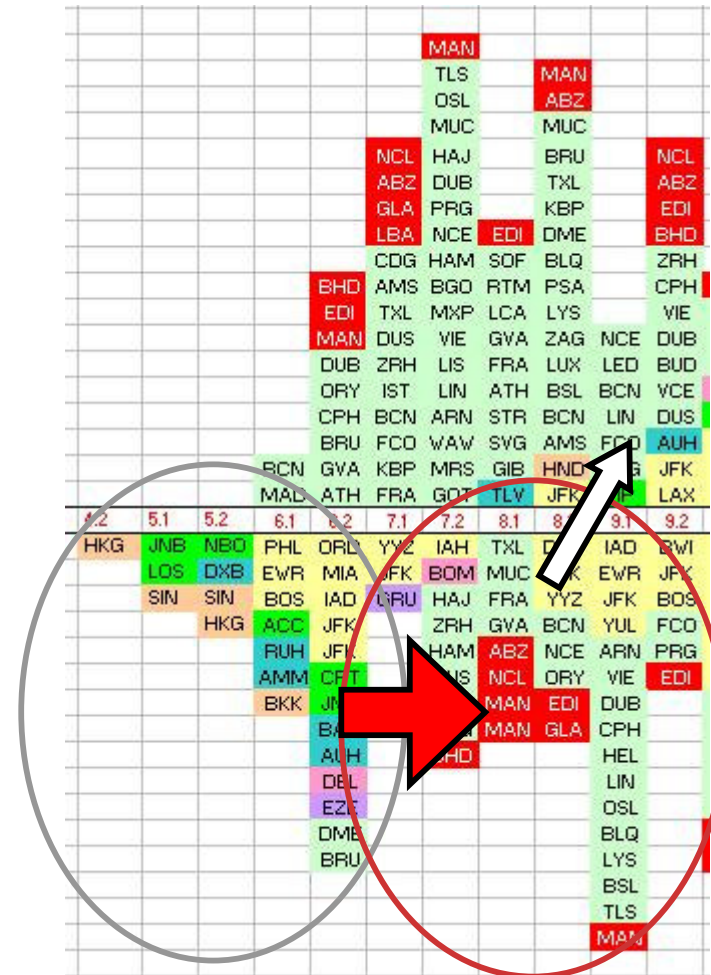


# Alternatives ?

- Heathrow is constrained unlike competing large EU hub airports
- 480k per annum movement cap
- For later AM arrivals (e.g. 7-9am) both runways are already full

## Moving early arrivals later?

- Lost feed support for 1<sup>st</sup> departures weakens network
- Uncompetitive = unviable
- Cancellation of other flights
- Slot confiscation?
- Inadequate infrastructure?
- Operational efficiency issues



# Service pattern example

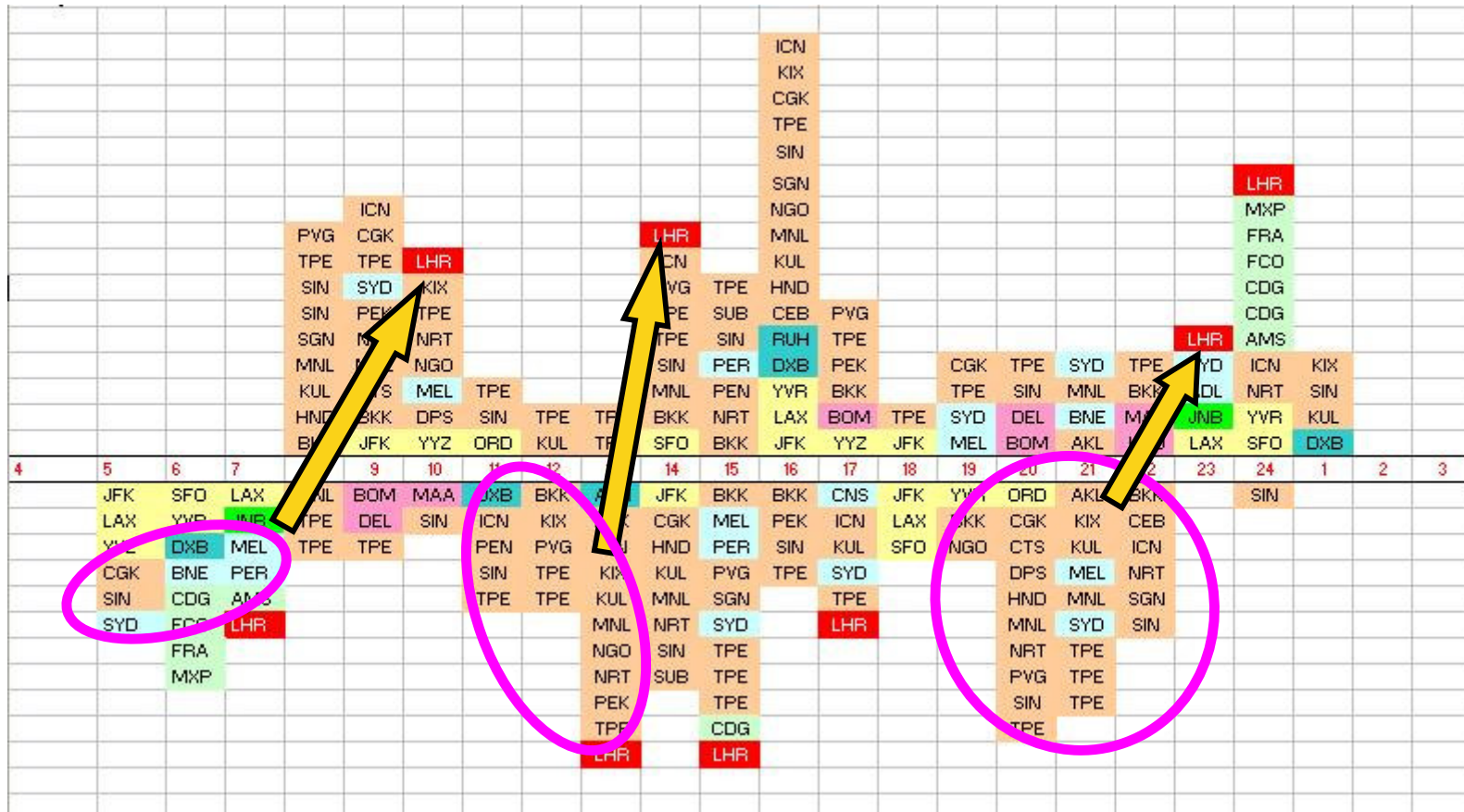
Hong Kong	Depart	Arrive	LHR service	Europe service
	19:00	01:00		
	20:00	02:00		
	21:00	03:00		
	22:00	04:00		
	23:00	05:00	2xBA Cathay, Virgin	KLM, Lufthansa, AirFrance, Swiss
	00:00	06:00	Cathay	Finnair
	01:00	07:00		
	02:00	08:00		
	03:00	09:00		
	04:00	10:00		
	05:00	11:00		
	06:00	12:00		
	07:00	13:00		
	08:00	14:00		
	09:00	15:00	AirNZ (ends S13)	Finnair 2pw
	10:00	16:00	Cathay	AirFrance 5pw
	11:00	17:00		
	12:00	18:00		
	13:00	19:00		
	14:00	20:00	Cathay	
	15:00	21:00		
	16:00	22:00		
	17:00	23:00		
	18:00	00:00		

OAG schedule data for Aug 2013



Dep

Cathay Pacific hub at Hong Kong  
Friday August 2013  
110 flights. Three wave system



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# Conclusions

- **BA and the UK compete globally for the knowledge and trade flows that are facilitated by connectivity**
- The quality of UK connectivity is underpinned by the hub
- BA is service driven:
  - Operate a hub model because of the customer benefits
  - Fierce competition with other global hub operators
  - Commercial viability is essential to grow and maintain the network
- Night flights are a key component of the hub model
  - Cannot be viewed in isolation from the rest of the hub
- “Alternatives” undermine service viability and strain inadequate infrastructure



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