



USA

A comparison of 2017 and 2023 air services between Scotland and the USA

Key Statistics About American Tourists

- Largest international inbound market to Scotland by visitors
- 20% of overseas tourists to Scotland are American
- American tourists contribute 20% of overseas tourism spending
- Numbers of American tourists are above pre-pandemic levels

2017 DIRECT AMERICAN ROUTES

Edinburgh Airport

- Chicago
- New York JFK
- Newark
- Newburgh
- Providence
- Orlando Sanford
- Windsor Locks

Glasgow Airport

- Las Vegas
- New York JFK
- Newark
- Orlando
- Philadelphia
- Orlando Sanford

2017 PASSENGER NUMBERS

- Edinburgh - Chicago = 36,668
- Edinburgh - New York JFK = 127,570
- Edinburgh - Newark = 139,111
- Edinburgh - Newburgh = 44,445
- Edinburgh - Orlando Sanford = 2,305
- Edinburgh - Windsor Locks = 18,644

- Glasgow - Las Vegas = 25,078
- Glasgow - New York JFK = 31,702
- Glasgow - Newark = 69,881
- Glasgow - Orlando Intl = 98,136
- Glasgow - Orlando Sanford = 21,756
- Glasgow - Philadelphia = 39,691

2017 Market Share



654,987 DIRECT PASSENGERS BETWEEN THE USA AND SCOTLAND

2017 SUMMARY

- Edinburgh had the largest number of American travellers, with the following airlines operating on each route;
 - **Delta Air Lines** - New York JFK
 - **Norwegian** - Newburgh/Providence/Windsor Locks
 - **Thomson** - Orlando Sanford
 - **United Airlines** - Chicago/Newark
- Services from Glasgow were operated by;
 - **American Airlines** - Philadelphia
 - **Delta Air Lines** - New York JFK
 - **Thomas Cook** - Orlando Intl
 - **Thomson** - Orlando Sanford
 - **United Airlines** - Newark
 - **Virgin Atlantic** - Las Vegas/Orlando Intl

2023 DIRECT AMERICAN ROUTES

Edinburgh Airport

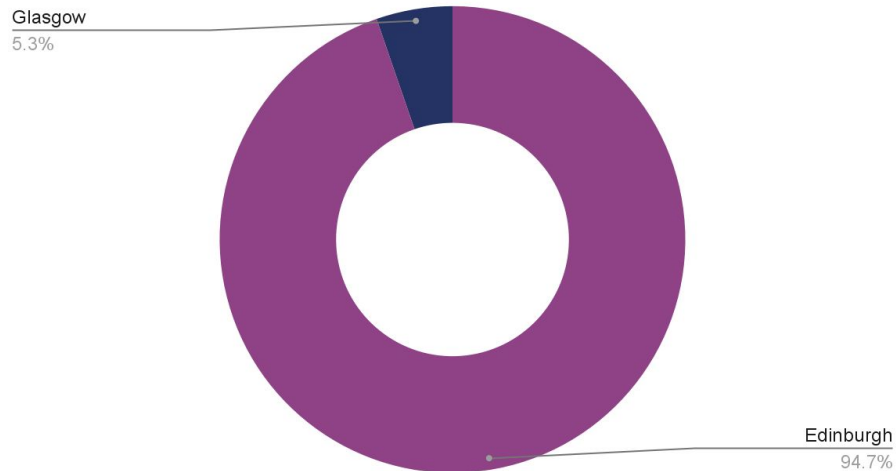
- Atlanta
- Boston
- Chicago
- New York JFK
- Newark
- Melbourne Orlando
- Orlando Intl
- Washington Dulles

Glasgow Airport

- Melbourne Orlando

2023 PASSENGER NUMBERS

20123 Market Share



- Edinburgh - Atlanta = 43,566
- Edinburgh - Boston = 65,884
- Edinburgh - Chicago = 46,232
- Edinburgh - New York JFK = 120,564
- Edinburgh - Newark = 153,794
- Edinburgh - Melbourne Orlando = 1,997
- Edinburgh - Orlando Intl = 22,856
- Edinburgh - Washington Dulles = 57,085

- Glasgow - Melbourne Orlando = 28,620

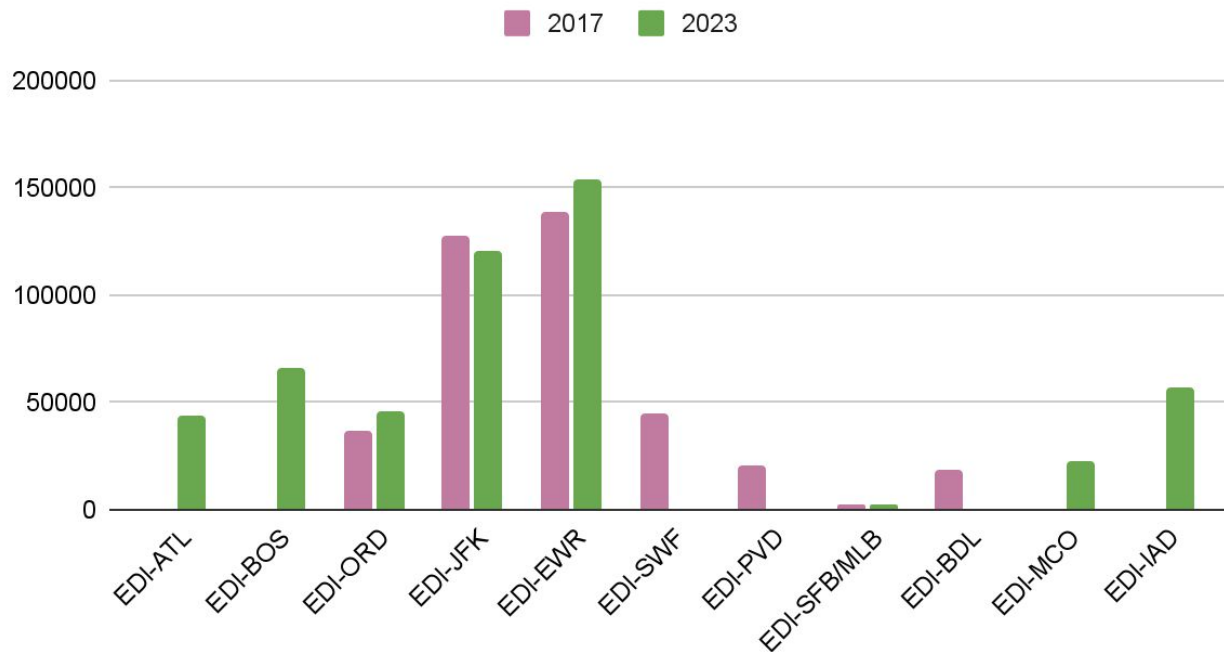
540,598 DIRECT PASSENGERS BETWEEN THE USA AND SCOTLAND

2023 SUMMARY

- Edinburgh had the largest number of American travellers, with the following airlines operating on each route;
 - **Delta Air Lines** - Atlanta/Boston/New York JFK
 - **TUI** - Melbourne Orlando
 - **United Airlines** - Chicago/Newark/Washington Dulles
 - **Virgin Atlantic** - Orlando Intl
- The service from Glasgow were operated by;
 - **TUI** - Melbourne Orlando

2017/2023 COMPARISON

2017/2023 Comparison - EDI Only



EDI = Edinburgh
ATL = Atlanta
BOS = Boston
ORD = Chicago
JFK = New York JFK
EWR = Newark
SWF = Newburgh
PVD = Providence
SFB = Orlando Sanford
MLB = Melbourne Orlando
BDL = Windsor Locks
MCO = Orlando Intl
IAD = Washington Dulles

2017/2023 COMPARISON

2017/2023 Comparison - GLA Only



GLA = Glasgow
JFK = New York JFK
EWR = Newark
LAS = Las Vegas
SFB = Orlando Sanford
MLB = Melbourne Orlando
MCO = Orlando Intl
PHL = Philadelphia

2017/2023 COMPARISON - NOTES

- Edinburgh Airport not only increased its market share, it all but wiped out USA services from Glasgow.
- The following routes that operated in 2017 did not operate in 2023;
 - **Edinburgh** - Newburgh/Providence/Windsor Locks
 - **Glasgow** - Las Vegas/New York JFK/Newark/Orlando Intl/Philadelphia
- The following routes that did not operate in 2017 operated in 2023;
 - **Edinburgh** - Atlanta/Boston/Orlando Intl/ Washington Dulles

Two significant changes between 2017 and 2023 were the collapse of Thomas Cook in 2019 and also Norwegian stopping Long Haul flying following a major restructuring. As a result of the Norwegian restructure it is very unlikely that Newburgh/Providence and Windsor Locks will ever gain flights to Scotland.

LOOKING AT 2024

- **Edinburgh;** A number of changes have taken place in 2024 with several airlines;
 - **Atlanta** will operate for a longer season with Delta
 - JetBlue have launched a daily **New York JFK** route operating seasonally
 - **Newark** will be reduced from 14 weekly to 12 weekly in July and the first half of August. In October the service will operate 7 weekly rather than 14 weekly
 - **Orlando Intl** will operate all summer, rather than a June start, but is still significantly behind the amount of capacity offered on the route when it operated from Glasgow.
 - **Melbourne Orlando** will now not operate as TUI have decided to consolidate their Orlando flights in Glasgow

- **Glasgow;** TUI remain at 2x week, but extended their 3x weekly flight for an extra week in July to partially compensate for the loss of the EDI-MLB route.

AGS boss Andy Cliffe has stated on several occasions that GLA is working towards a New York flight, it should become clear by October if this route will operate in 2025.