

# *Aviation Trends*

## *Quarter 2 2008*



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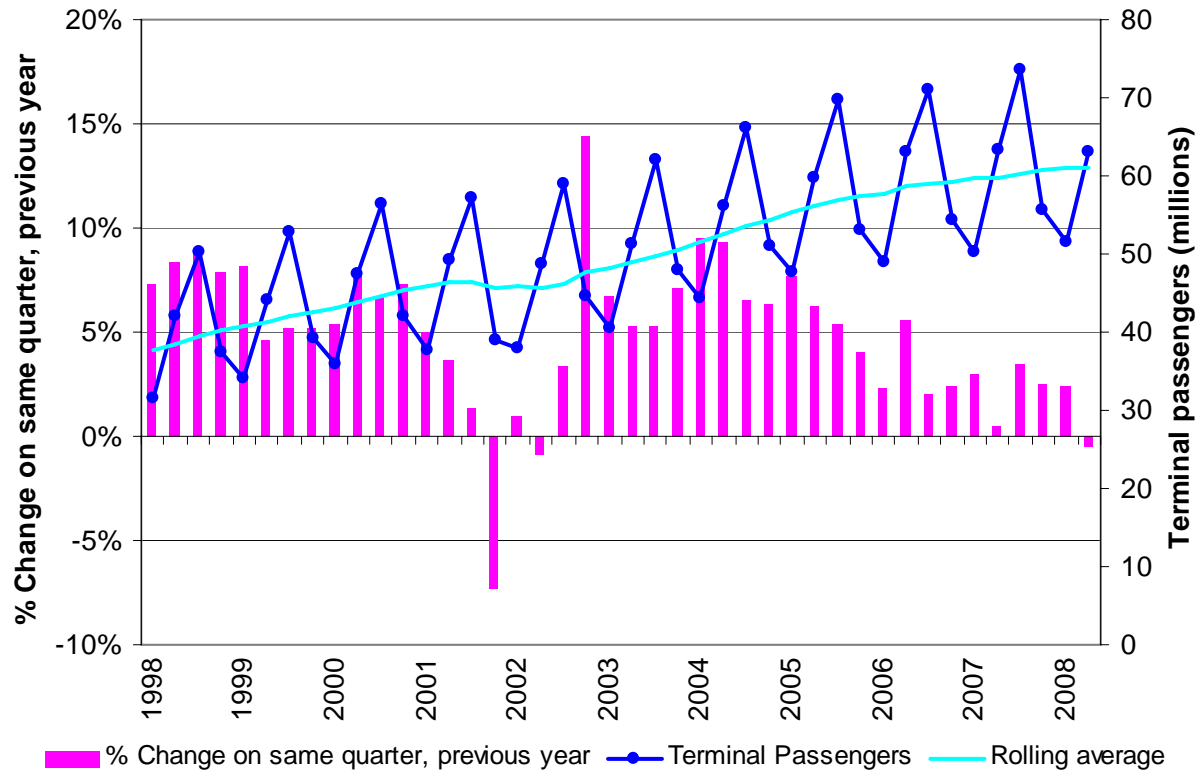
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## Introduction

Welcome to the second issue of Aviation Trends. Thank you for the feedback we have received so far – we are hoping to refine the layout in the future and will try to take on board all of the comments that have been made. Every quarter we update key figures which summarise the levels of activity at the UK's airports. In each edition also includes some different interesting facts derived from the various data sources available to the CAA.

Aviation trends will be released on [www.caa.co.uk/aviationtrends](http://www.caa.co.uk/aviationtrends), part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications, which provide more detailed information on UK aviation activity and are published with the co-operation of UK airport and airline operators, whose assistance is gratefully acknowledged. Please note that historic numbers may be subject to minor change as the result of prior period adjustments.

## 1. Historical overview - Terminal passengers at UK airports by quarter<sup>6,11</sup>



Source: CAA Airport Statistics

By plotting quarterly passenger data over the last ten years, both seasonal and annual trends in UK aviation activity can be seen.

The dark blue line shows the number of terminal passengers at UK airports in each quarter (on the right axis). The bright blue line shows the same, but for the rolling annual average in each quarter.

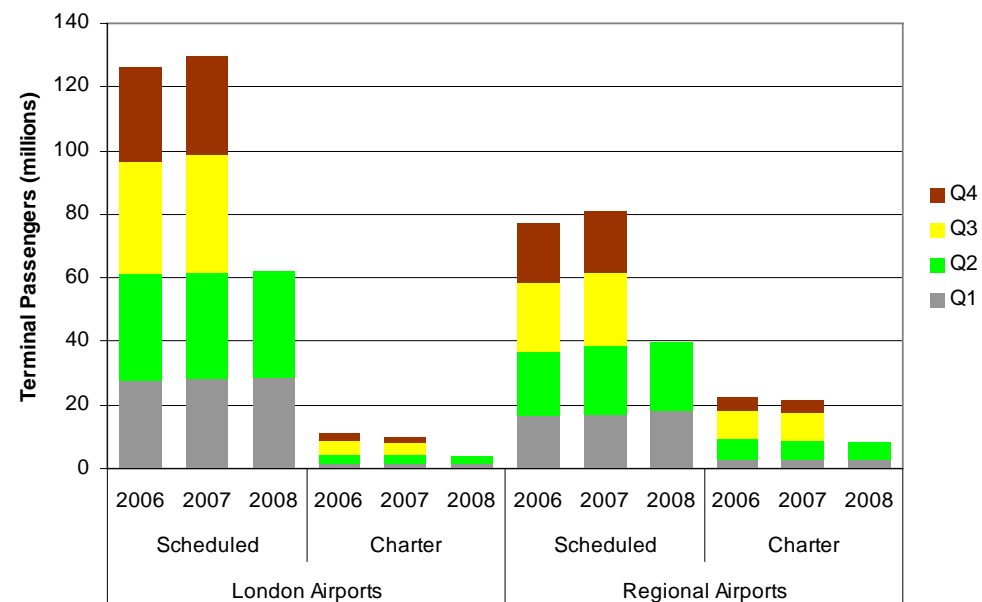
The pink bars show the percentage growth on the previous year's passengers in the same quarter (on the left axis).

For the first time since the aftermath of 11 September 2001, the number of terminal passengers fell (albeit marginally) in 2008 quarter 2, compared with the previous year. At least in part, this is due to Easter moving from April in 2007, to March in 2008.

However, the same movement of Easter occurred between 2004 and 2005, when quarter 2 growth was 6.2%.

## 2. Terminal passengers at UK airports<sup>5,6,7,11</sup>

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2008		Q2 2007		+/- %	Q3 07 – Q2 08		Q3 06 – Q2 07		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>London Airports</b>	<b>35.6</b>	<b>57%</b>	<b>36.0</b>	<b>57%</b>	<b>-1.0%</b>	<b>139.9</b>	<b>58%</b>	<b>137.3</b>	<b>58%</b>	<b>1.9%</b>
- Scheduled	33.2	53%	33.4	53%	-0.7%	129.9	53%	126.9	53%	2.4%
- Charter	2.4	4%	2.6	4%	-5.3%	9.9	4%	10.4	4%	-4.7%
<b>Regional Airports</b>	<b>27.2</b>	<b>43%</b>	<b>27.1</b>	<b>43%</b>	<b>0.2%</b>	<b>103.1</b>	<b>42%</b>	<b>100.9</b>	<b>42%</b>	<b>2.1%</b>
- Scheduled	21.6	34%	21.1	33%	2.3%	82.1	34%	78.9	33%	4.1%
- Charter	5.6	9%	6.0	10%	-7.0%	21.0	9%	22.1	9%	-5.0%
<b>All Airports</b>	<b>62.8</b>	<b>100%</b>	<b>63.1</b>	<b>100%</b>	<b>-0.5%</b>	<b>243.0</b>	<b>100%</b>	<b>238.2</b>	<b>100%</b>	<b>2.0%</b>
- Scheduled	54.8	87%	54.5	86%	0.5%	212.1	87%	205.7	86%	3.1%
- Charter	8.0	13%	8.6	14%	-6.5%	30.9	13%	32.5	14%	-4.9%



Source: CAA Airport Statistics<sup>3</sup>

The number of terminal passengers represents those travellers who boarded or disembarked an aircraft on a commercial flight at a reporting UK airport. This figure therefore excludes transit passengers – those who remain aboard aircraft which land at a UK airport and then depart for another destination.

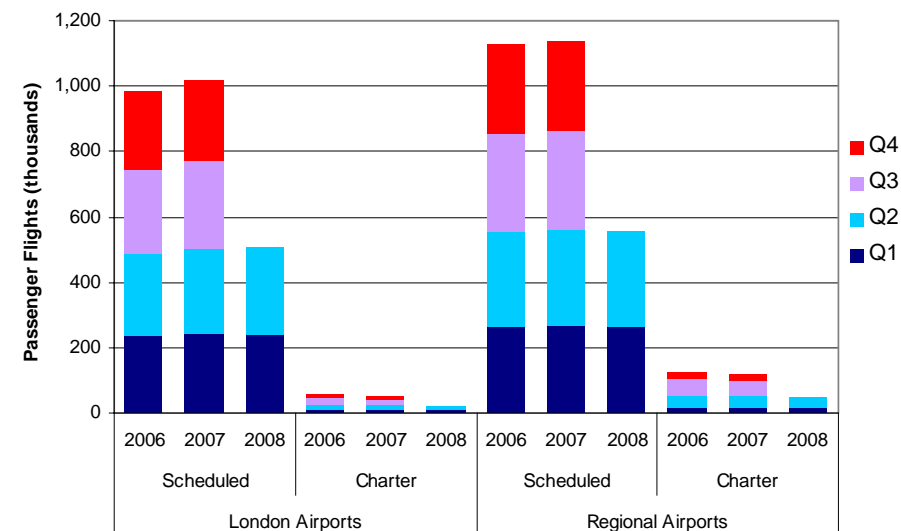
Total terminal passengers at UK airports in quarter 2 2008 were down 0.5% (0.3m) on quarter 2 2007, but the figure for the year ending quarter 2 2008 was 2% (4.7m) higher than that of the year ending quarter 2 2007.

The number of scheduled passengers fell slightly at the London airports in quarter 2, though grew at regional airports. Charter passenger numbers for all airports fell strongly. London airport passenger numbers fell overall, while regional airport passenger growth was roughly flat. The year ending figures support the general trend seen in recent years for faster passenger growth in the regions than at London airports.

### 3. Passenger flights to and from UK airports<sup>5,7,11</sup>

Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2008		Q2 2007		+/- %	Q3 07 – Q2 08		Q3 06 – Q2 07		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>London Airports</b>	<b>276.9</b>	<b>46%</b>	<b>274.7</b>	<b>46%</b>	<b>0.8%</b>	<b>1,075.3</b>	<b>46%</b>	<b>1,055.2</b>	<b>46%</b>	<b>1.9%</b>
- Scheduled	264.0	44%	260.4	43%	1.4%	1,023.5	44%	999.0	43%	2.5%
- Charter	12.9	2%	14.3	2%	-9.7%	51.8	2%	56.2	2%	-7.8%
<b>Regional Airports</b>	<b>328.7</b>	<b>54%</b>	<b>328.2</b>	<b>54%</b>	<b>0.2%</b>	<b>1,250.9</b>	<b>54%</b>	<b>1,258.7</b>	<b>54%</b>	<b>-0.6%</b>
- Scheduled	297.6	49%	294.4	49%	1.1%	1,134.6	49%	1,134.1	49%	0.0%
- Charter	31.1	5%	33.8	6%	-7.9%	116.3	5%	124.7	5%	-6.7%
<b>All Airports</b>	<b>605.5</b>	<b>100%</b>	<b>602.8</b>	<b>100%</b>	<b>0.4%</b>	<b>2,326.2</b>	<b>100%</b>	<b>2,313.9</b>	<b>100%</b>	<b>0.5%</b>
- Scheduled	561.6	93%	554.8	92%	1.2%	2,158.1	93%	2,133.0	92%	1.2%
- Charter	44.0	7%	48.0	8%	-8.4%	168.1	7%	180.9	8%	-7.1%

Source: CAA Airport Statistics

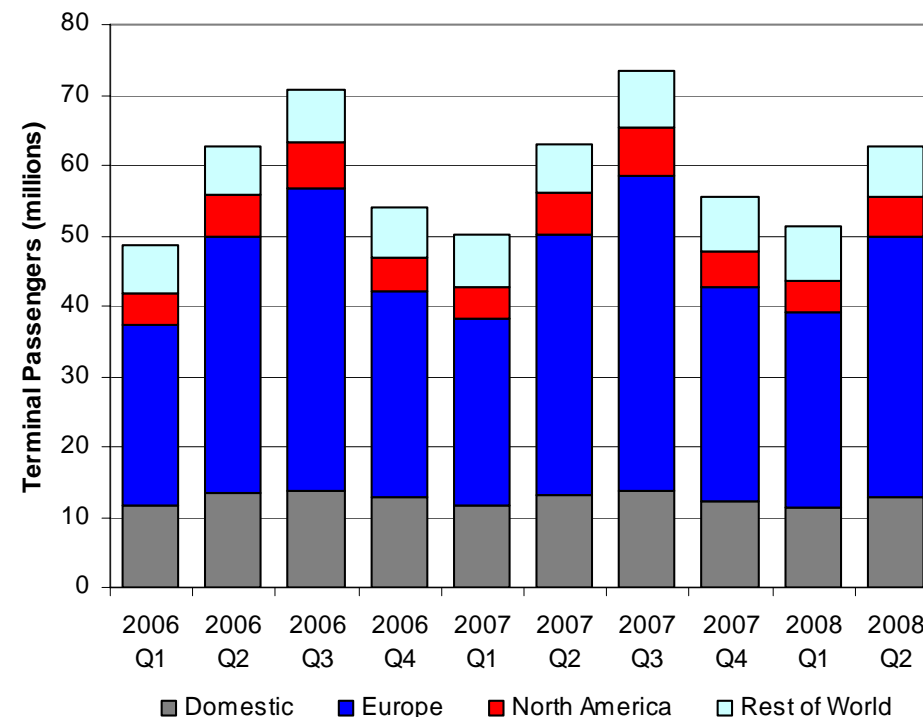


The figures in the table above are for commercial passenger flights and thus exclude flights of aircraft carrying exclusively cargo.

Flights to and from UK airports in quarter 2 2008 were up 0.4% (approximately 2,700) on quarter 2 2007. This was driven principally by a rise in scheduled flights at the London airports. However, from the previous table we can see that London scheduled passenger numbers fell 1% quarter-on-quarter, indicating a decrease in passengers per aircraft at London airports. Over the year to Q2 2008, the 1% increase in total flights was driven solely by London airport scheduled services: both London and regional airport charter flight numbers contracted, and regional scheduled flight numbers were broadly unchanged.

#### 4. Terminal passengers at UK airports by origin / destination<sup>6,7,8,9,11</sup>

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2008		Q2 2007		+/- %	Q3 07 - Q2 08		Q3 06 - Q2 07		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>Domestic</b>	<b>12.7</b>	<b>20%</b>	<b>13.2</b>	<b>21%</b>	<b>-3.3%</b>	<b>50.0</b>	<b>21%</b>	<b>51.3</b>	<b>22%</b>	<b>-2.5%</b>
- Scheduled	12.7	20%	13.1	21%	-3.2%	49.6	20%	50.9	21%	-2.4%
- Charter	0.1	0.1%	0.1	0.2%	-13.5%	0.3	0.1%	0.4	0.2%	-15.1%
<b>Europe</b>	<b>37.0</b>	<b>59%</b>	<b>36.9</b>	<b>58%</b>	<b>0.3%</b>	<b>140.1</b>	<b>58%</b>	<b>135.8</b>	<b>57%</b>	<b>3.2%</b>
- Scheduled	30.3	48%	29.7	47%	2.1%	114.9	47%	109.4	46%	5.1%
- Charter	6.6	11%	7.1	11%	-7.3%	25.2	10%	26.4	11%	-4.7%
<b>North America</b>	<b>6.0</b>	<b>9%</b>	<b>6.0</b>	<b>10%</b>	<b>-1.3%</b>	<b>22.5</b>	<b>9%</b>	<b>21.9</b>	<b>9%</b>	<b>3.0%</b>
- Scheduled	5.7	9%	5.8	9%	-0.9%	21.7	9%	20.8	9%	4.1%
- Charter	0.2	0.4%	0.3	0%	-11.0%	0.9	0.4%	1.1	0.4%	-18.3%
<b>Rest of World</b>	<b>7.1</b>	<b>11%</b>	<b>7.0</b>	<b>11%</b>	<b>1.3%</b>	<b>30.4</b>	<b>12%</b>	<b>29.3</b>	<b>12%</b>	<b>3.6%</b>
- Scheduled	6.0	10%	6.0	9%	1.5%	25.8	11%	24.7	10%	4.6%
- Charter	1.1	2%	1.1	2%	0.3%	4.5	2%	4.6	2%	-2.0%
<b>Total</b>	<b>62.8</b>	<b>100%</b>	<b>63.1</b>	<b>100%</b>	<b>-0.5%</b>	<b>243.0</b>	<b>100%</b>	<b>238.2</b>	<b>100%</b>	<b>2.0%</b>
- Scheduled	54.8	87%	54.5	86%	0.5%	212.1	87%	205.7	86%	3.1%
- Charter	8.0	13%	8.6	14%	-6.5%	30.9	13%	32.5	14%	-4.8%

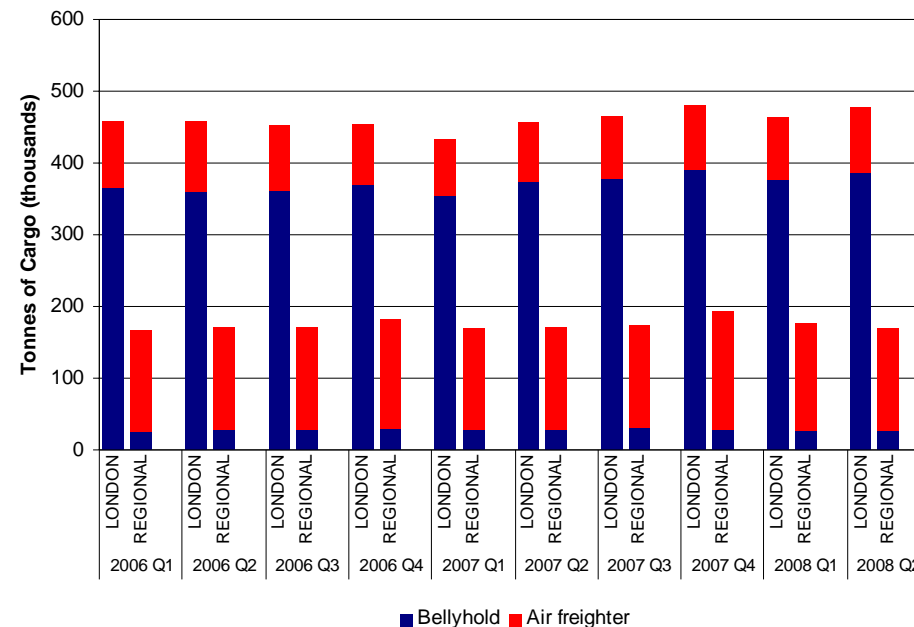


Source: CAA Airport Statistics

Domestic air passenger numbers, largely on scheduled services, continued to decline, by 3% year on year in Q2. The number of passengers flying to and from Europe grew only marginally in Q2, as charter services were heavily reduced. Over the year to Q2 2008 strong growth of scheduled services to and from Europe outweighed the declines in charter services to give 3% growth overall. North Atlantic scheduled passengers, despite the commencement of the EU-US Open Sky agreement on 30<sup>th</sup> March, fell 1% in Q2 2008 compared to 2007, while traffic to and from the rest of the world increased.

## 5. Air cargo tonnes carried to and from UK airports<sup>5,7,10</sup>

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2008		Q2 2007			Q3 07 - Q2 08		Q3 06 - Q2 07		
	Tonnes (000s)	% of total	Tonnes (000s)	% of total	+/- %	Tonnes (000s)	% of total	Tonnes (000s)	% of total	+/- %
<b>Air freighter</b>	<b>235</b>	<b>36%</b>	<b>226</b>	<b>36%</b>	<b>4.1%</b>	<b>956</b>	<b>37%</b>	<b>918</b>	<b>37%</b>	<b>4.2%</b>
London	91	14%	82	13%	10.8%	353	14%	337	14%	4.9%
Regional	144	22%	144	23%	0.2%	603	23%	581	23%	3.8%
<b>Bellyhold</b>	<b>414</b>	<b>64%</b>	<b>401</b>	<b>64%</b>	<b>3.2%</b>	<b>1,645</b>	<b>63%</b>	<b>1,571</b>	<b>63%</b>	<b>4.7%</b>
London	388	60%	373	60%	3.8%	1,533	59%	1,457	59%	5.2%
Regional	27	4%	28	4%	-4.1%	112	4%	114	5%	-2.9%
<b>All cargo</b>	<b>650</b>	<b>100%</b>	<b>628</b>	<b>100%</b>	<b>3.5%</b>	<b>2,602</b>	<b>100%</b>	<b>2,488</b>	<b>100%</b>	<b>4.6%</b>
London	479	74%	456	73%	5.1%	1,887	73%	1,794	72%	5.2%
Regional	171	26%	172	27%	-0.5%	715	27%	695	28%	2.9%



Source: CAA Airport Statistics

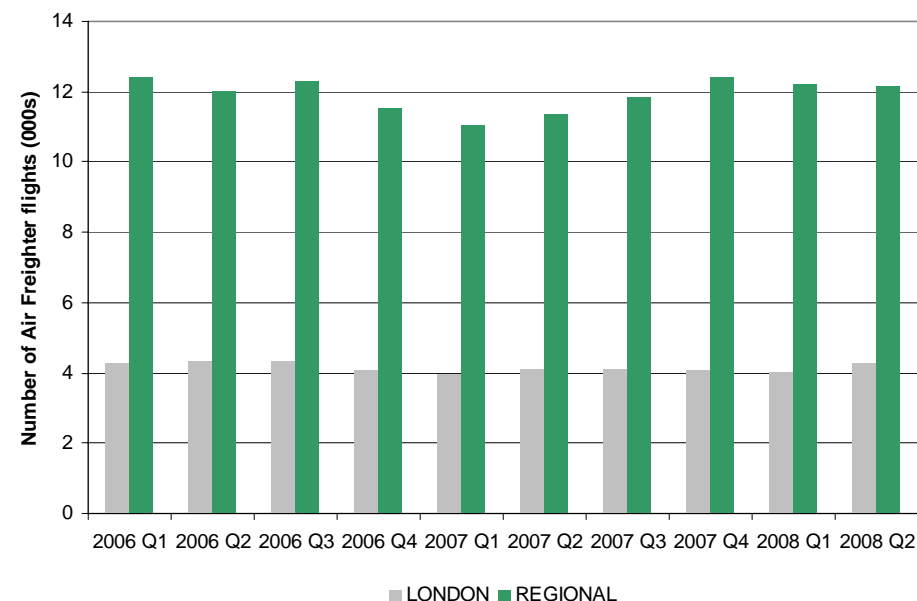
Air cargo – freight and mail – is transported in and out of the UK on air freighters and in the bellyholds of passenger aircraft.

Unlike terminal passenger numbers, the weight of cargo handled at UK airports continues to increase robustly, driven primarily by strong growth at London airports of bellyhold cargo *and* air freighter cargo (though from a smaller base).

Growth of regional air freighter cargo has slowed, with 4% growth over the year ending Q2 2008, but only 0.2% in Q2 itself, year on year. This, in combination with declining bellyhold cargo at regional airports, gave an overall contraction of the cargo weight handled at regional airports in Q2 2008, versus Q2 2007.

## 6. All commercial flights to and from UK airports<sup>5,7,10,11</sup>

Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2008		Q2 2007		+/- %	Q3 07 – Q2 08		Q3 06 – Q2 07		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>Air freighter</b>	<b>16</b>	<b>3%</b>	<b>15</b>	<b>3%</b>	<b>6.2%</b>	<b>65</b>	<b>3%</b>	<b>63</b>	<b>3%</b>	<b>3.8%</b>
London	4	1%	4	1%	4.4%	17	1%	16	1%	0.3%
Regional	12	2%	11	2%	6.8%	49	2%	46	2%	5.1%
<b>Passenger</b>	<b>606</b>	<b>97%</b>	<b>603</b>	<b>97%</b>	<b>0.4%</b>	<b>2,326</b>	<b>97%</b>	<b>2,314</b>	<b>97%</b>	<b>0.5%</b>
London	277	45%	275	44%	0.8%	1,075	45%	1,055	44%	1.9%
Regional	329	53%	328	53%	0.2%	1,251	52%	1,259	53%	-0.6%
<b>All flights</b>	<b>622</b>	<b>100%</b>	<b>618</b>	<b>100%</b>	<b>0.6%</b>	<b>2,391</b>	<b>100%</b>	<b>2,377</b>	<b>100%</b>	<b>0.6%</b>
London	281	45%	279	45%	0.9%	1,092	46%	1,072	45%	1.9%
Regional	341	55%	340	55%	0.4%	1,300	54%	1,305	55%	-0.4%



Source: CAA Airport Statistics

The number of commercial flights at reporting UK airports is a measure of commercial aviation activity in the UK. It includes both passenger and cargo flights, but excludes military flights, general aviation and aircraft that pass through UK airspace without landing.

Total commercial flights in the UK increased 0.6% in quarter 2 2008 compared to 2007. Passenger flights increased 0.4%, which was driven mainly by increases in flights at London airports (up 0.8%), whilst flights at regional airports grew at a slower rate (0.2%).

Air freighter flights increased 6% in quarter 2 2008, which was greater than the 4% increase seen over the rolling year. This fast growth was not enough to significantly affect total commercial flight growth, given air freighter flights only comprise 3% of total flights.

Strong air freighter flight growth (7% year on year) at regional airports in Q2 was not matched by the increase in cargo weight carried, which grew by just 0.2%.



## Did you know?

### The effect of Eurostar's relocation on air traffic.

On 14 November 2007, Eurostar moved its London operations from Waterloo to St Pancras International, offering better connections to rail services into London from the North. It also enabled the full use of the dedicated high-speed line connecting central London to the Channel Tunnel.

Air passengers to Paris and Brussels from London, in the first half of 2008, declined 13 per cent compared to the same period in 2007. Passengers on these routes from airports in regions with good rail links to North London declined seven per cent over the period, whereas those at other regional airports saw 22 per cent growth. Overall, in the UK, there was a five per cent (134 thousands) decline in air passengers, yet there was an eight per cent growth of passengers in the two modes combined. By contrast, air passengers flying from the UK to other European capitals without rail connections (Madrid, Lisbon, Dublin and Berlin) grew three per cent over the same period.

Eurostar report increased passenger numbers of 720 thousands (18 per cent) between the first half of 2007 and the first half of 2008. The figure shows the change in passengers for each of the modes<sup>1</sup> in the first half of each year since 2004.

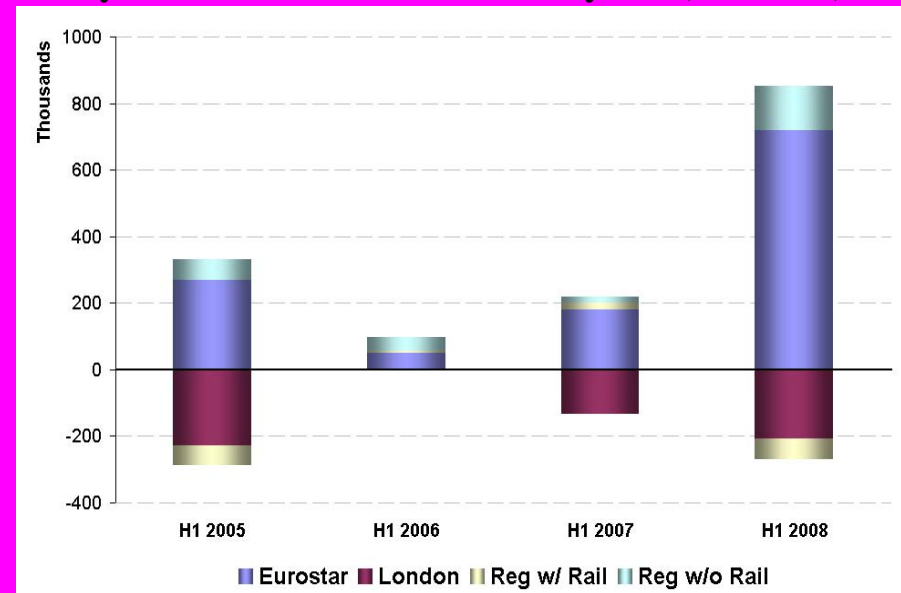
It can be seen that changes in the growth rate for air travel in the first half of 2008 were similar to those seen between 2005 and 2007. However, the increase in Eurostar market share was enhanced because of the recent improvement to Eurostar

<sup>1</sup> The chart does not show passengers travelling either by cross-channel ferry or the Eurotunnel car service.

services which appears to have stimulated additional traffic to Paris and Brussels.

Eurostar gained market share from airlines operating from London airports and regional airports in areas with good rail links to North London. Other regional airports also gained market share as airlines moved services away from airports serving cities with good rail links.

### Year on year change in passengers to Paris and Brussels by air and across the Channel by rail (Eurostar)



Note: all except the Eurostar bars are airport figures.

Source: CAA airport statistics and Eurostar

## Notes

1. The Civil Aviation Authority data is prepared with the co-operation of the United Kingdom airport and airline operators. The assistance from all these organisations is gratefully acknowledged.
2. The information contained in this report has been compiled from various sources and it is not possible for the CAA to check and verify whether it is accurate and correct, nor does the CAA undertake to do so. Consequently the CAA cannot accept any liability for any financial loss caused by any person's reliance on it.
3. More detailed data are available from the Civil Aviation Authority website at the following address - [www.caa.co.uk/aviationtrends](http://www.caa.co.uk/aviationtrends).
4. The CAA is the UK's specialist aviation regulator whose regulatory activities range from ensuring the aviation industry meets the highest safety standards to preventing holidaymakers from being stranded abroad because of tour operator insolvency.
5. Graphs 2, 3 and 5: London airports are Heathrow, Gatwick, Stansted, Luton and London City. Regional Airports are all other UK airports.
6. Graphs 1, 2 and 4: Terminal passengers are those commencing their journey or connecting between flights at the airport, but exclude transit passengers who do not disembark.
7. Graphs 2, 3, 4, 5 and 6 exclude traffic to and from North Sea oilrigs.
8. Graph 4: For the purposes of this report, World Areas are defined as follows:
  - Domestic - the United Kingdom, the Channel Islands and the Isle of Man;
  - Europe - geographical Europe including Turkey and the former Soviet Union states;
  - North America - USA, Canada and Puerto Rico;
  - Rest of World - all other countries.
9. Graph 4: a destination is defined to be where a passenger boards or alights the aircraft on which they arrived or departed from the reporting airport; it is not necessarily the first or last stop of a multi-sector flight.
10. Graph 5: Cargo comprises mail and freight.
11. All data excludes the activity of Air Taxis – those aircraft with maximum take-off weights of less than 15 tonnes flying non-scheduled services.