

# Aviation Trends

## Quarter 2 2009



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## Introduction

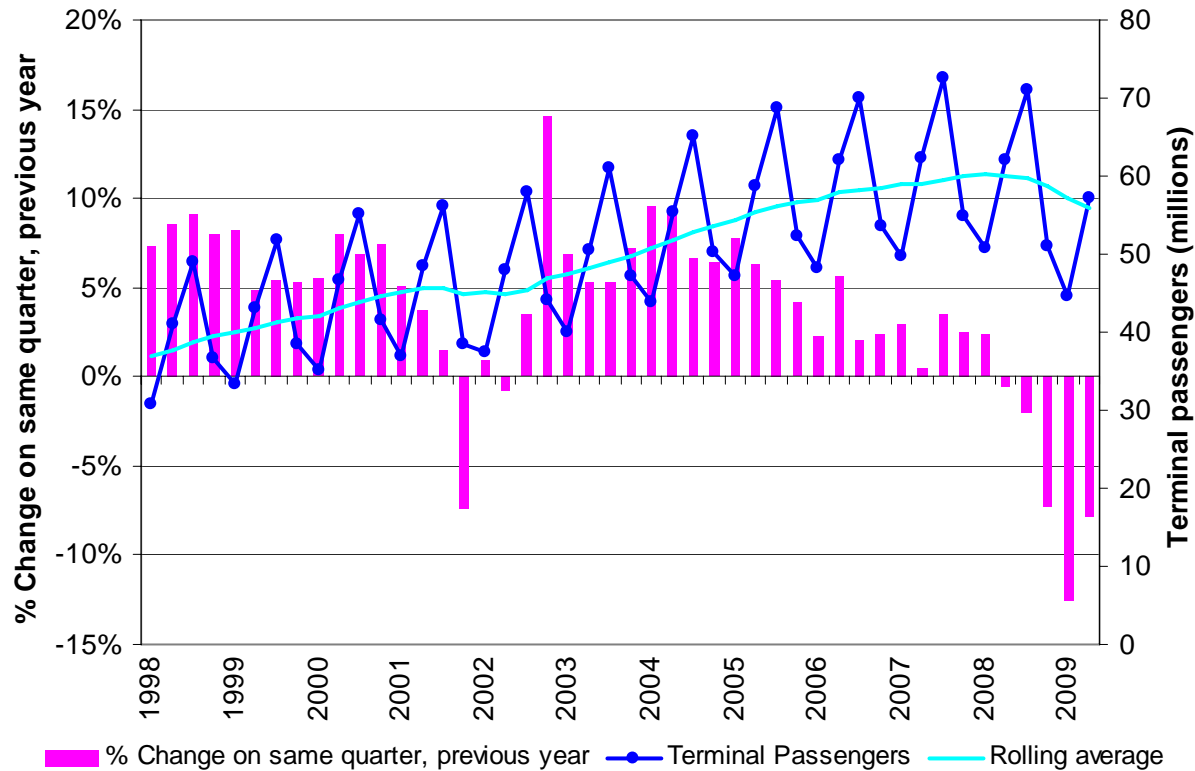
Welcome to Aviation Trends. Every quarter we update key figures which summarise the levels of activity at the UK's airports. In this issue, we have made some amendments to the charts used to illustrate the main data series; please let us know what you think of these changes. Each edition also includes a section entitled 'Did you know?' which aims to present different interesting facts derived from the various data sources available to the CAA; this time we present a time series of passengers at reporting UK airports from 1946 to the present day.

The number of passengers, flights, and the cargo tonnage handled at UK airports continued to decline in quarter 2 2009. Whereas the year-on-year decline in passenger numbers in quarter 1 was exacerbated by seasonal and weather factors (the movement of Easter from March to April, the leap year in 2008 giving one day less in February in 2009, and the heavy February snowfall which forced numerous flight cancellations) and was hence steep, at 13%, the decline in quarter 2 was smaller, at 8%, and may better reflect the underlying economic situation. It is also of similar magnitude to the decline in quarter 4 2008, of 7%.

The Aviation Trends series is available at [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. Please note that historic numbers may be subject to minor change as the result of prior period adjustments.

In editions of Aviation Trends prior to Q4 2008, all figures included activity at Channel Islands and Isle of Man airports. Because these islands are not formally part of the UK, and we wish to present only the trends at UK airports, their figures are now excluded.

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



Plotting quarterly passenger data over the last ten years shows both seasonal and annual trends in UK aviation activity.

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 number in the same quarter (on the left axis).

The year-on-year contraction in passenger numbers continued in quarter 2 2009, with an 8% reduction.

Source: CAA Airport Statistics

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

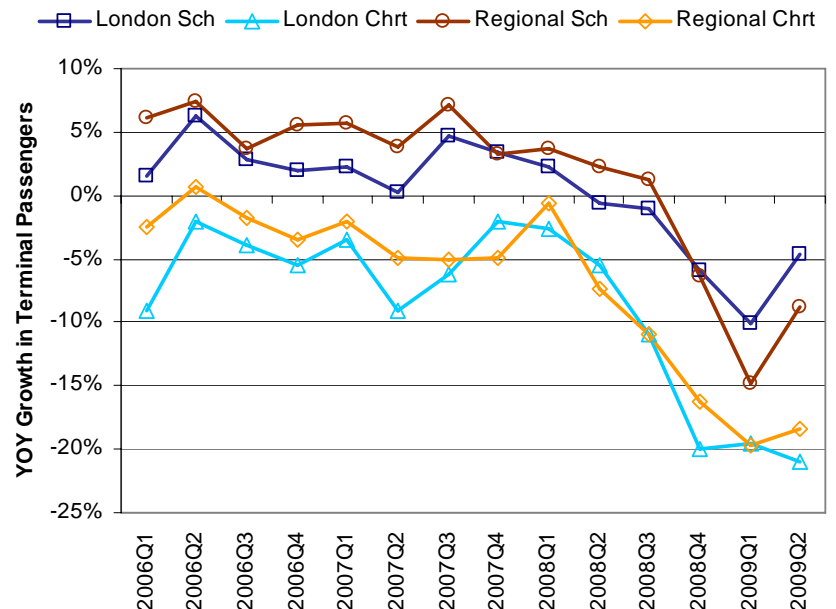
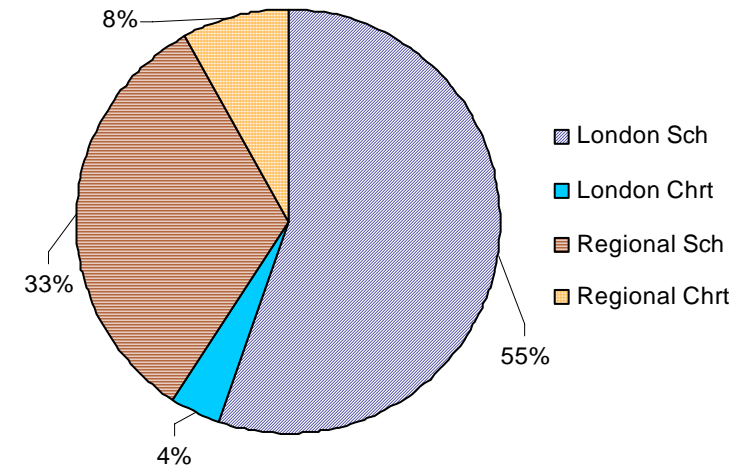
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2009		Q2 2008		+/- %	Q3 08 – Q2 09		Q3 07 – Q2 08		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>London Airports</b>	<b>33.6</b>	<b>59%</b>	<b>35.6</b>	<b>58%</b>	<b>-5.7%</b>	<b>131.6</b>	<b>59%</b>	<b>139.9</b>	<b>58%</b>	<b>-5.9%</b>
- Scheduled	31.7	56%	33.2	54%	-4.6%	123.3	55%	129.9	54%	-5.1%
- Charter	1.9	3%	2.4	4%	-21%	8.3	4%	9.9	4%	-16%
<b>Regional Airports</b>	<b>23.4</b>	<b>41%</b>	<b>26.2</b>	<b>42%</b>	<b>-11%</b>	<b>91.3</b>	<b>41%</b>	<b>99.7</b>	<b>42%</b>	<b>-8%</b>
- Scheduled	18.9	33%	20.7	33%	-8.8%	73.6	33%	78.9	33%	-6.7%
- Charter	4.5	8%	5.5	9%	-18%	17.7	8%	20.9	9%	-15%
<b>All Airports</b>	<b>57.0</b>	<b>100%</b>	<b>61.9</b>	<b>100%</b>	<b>-7.9%</b>	<b>222.9</b>	<b>100%</b>	<b>239.6</b>	<b>100%</b>	<b>-7.0%</b>
- Scheduled	50.6	89%	53.9	87%	-6.2%	196.9	88%	208.8	87%	-5.7%
- Charter	6.5	11%	8.0	13%	-19%	26.0	12%	30.8	13%	-16%

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

UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in the table and graph on this page therefore exclude transit passengers – those who remain aboard aircraft which land at a UK airport and then depart for another destination.

During quarter 2 2009 the decline in scheduled passengers was 6%, and the decline in charter passengers was 19%, at all airports. The scheduled passenger drop was proportionately higher at regional airports (8.8%) than London airports (4.6%), while the charter passenger fall was proportionately lower at regional airports (18%) than at London airports (21%).

Passenger Share (year to date)



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

Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2009		Q2 2008		+/- %	Q3 08 – Q2 09		Q3 07 – Q2 08		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>London Airports</b>	<b>255.2</b>	<b>50%</b>	<b>276.9</b>	<b>48%</b>	<b>-7.8%</b>	<b>1,018.7</b>	<b>50%</b>	<b>1,075.3</b>	<b>49%</b>	<b>-5.3%</b>
- Scheduled	244.7	47%	264.0	46%	-7.3%	974.8	47%	1,023.5	46%	-4.8%
- Charter	10.4	2%	12.9	2%	-19%	43.8	2%	51.8	2%	-15%
<b>Regional Airports</b>	<b>260.3</b>	<b>50%</b>	<b>297.6</b>	<b>52%</b>	<b>-13%</b>	<b>1,035.6</b>	<b>50%</b>	<b>1,132.7</b>	<b>51%</b>	<b>-8.6%</b>
- Scheduled	234.6	46%	267.0	46%	-12%	935.2	46%	1,017.6	46%	-8.1%
- Charter	25.7	5%	30.6	5%	-16%	100.4	5%	115.1	5%	-13%
<b>All Airports</b>	<b>515.5</b>	<b>100%</b>	<b>574.5</b>	<b>100%</b>	<b>-10%</b>	<b>2,054.2</b>	<b>100%</b>	<b>2,208.0</b>	<b>100%</b>	<b>-7.0%</b>
- Scheduled	479.3	93%	531.0	92%	-9.7%	1,910.0	93%	2,041.1	92%	-6.4%
- Charter	36.2	7%	43.5	8%	-17%	144.2	7%	166.8	8%	-14%

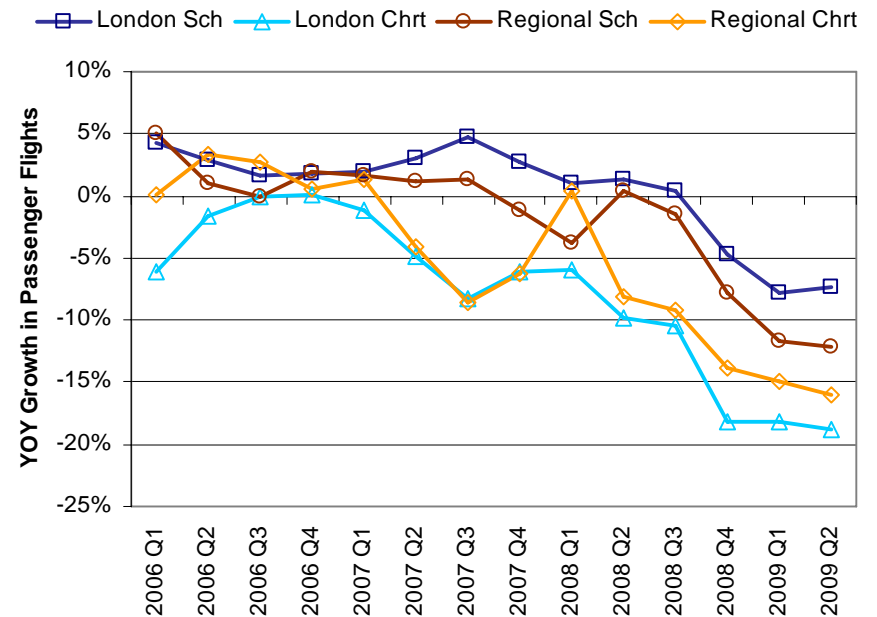
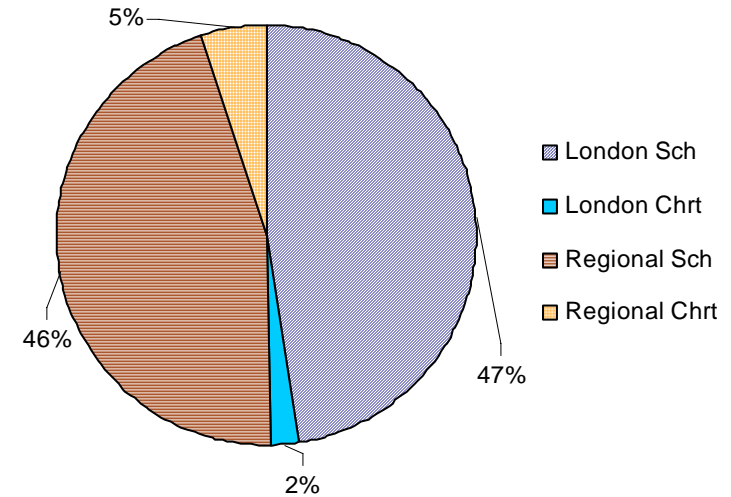
Source: CAA Airport Statistics

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

Flights to and from UK airports in quarter 2 2009 were down 10% (approximately 60,000) on quarter 2 2008. Rolling year flights fell 7%, which represents around 150,000 flights.

The fall in flight numbers was higher at regional airports (13%) than London airports (7.8%), and the fall in charter flights (17%) was proportionately greater than the fall in scheduled flights (9.7%).

Flight Share (year to date)

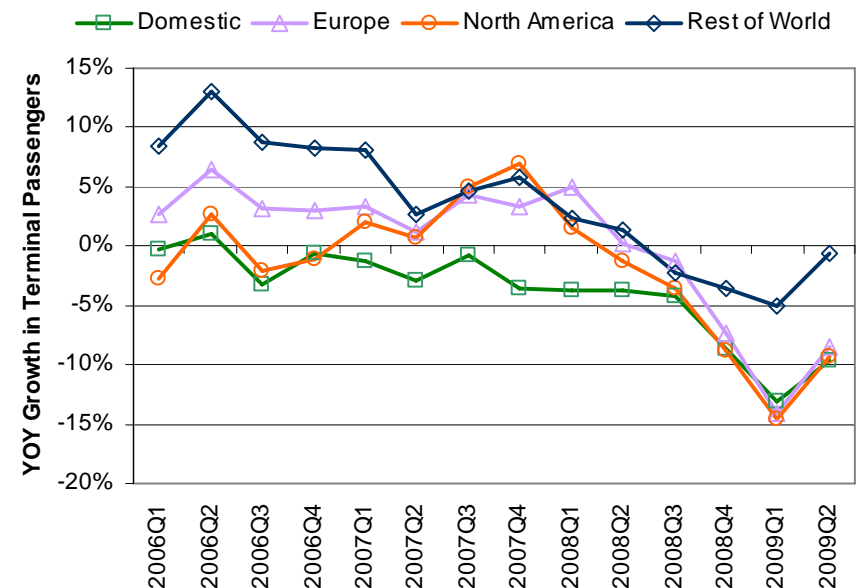
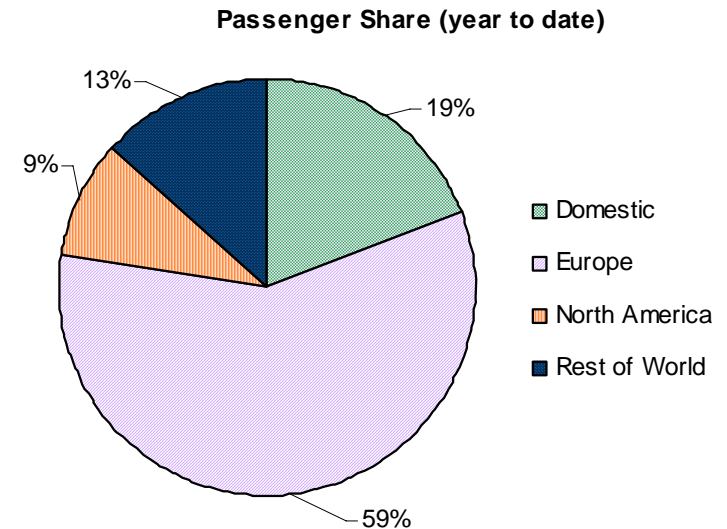


#### 4. Terminal passengers at UK airports by origin / destination<sup>6,7,8,9,11</sup>

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2009		Q2 2008		+/- %	Q3 08 – Q2 09		Q3 07 – Q2 08		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>Domestic</b>	<b>10.7</b>	<b>19%</b>	<b>11.9</b>	<b>19%</b>	<b>-9.6%</b>	<b>42.7</b>	<b>19%</b>	<b>46.7</b>	<b>19%</b>	<b>-8.7%</b>
- Scheduled	10.6	19%	11.8	19%	-9.7%	42.3	19%	46.4	19%	-8.8%
- Charter	0.1	0.1%	0.1	0.1%	1.5%	0.3	0.1%	0.3	0.1%	3.7%
<b>Europe</b>	<b>33.8</b>	<b>59%</b>	<b>36.9</b>	<b>60%</b>	<b>-8.5%</b>	<b>130.1</b>	<b>59%</b>	<b>140.0</b>	<b>58%</b>	<b>-7.0%</b>
- Scheduled	28.5	50%	30.3	49%	-6.1%	109.2	49%	114.9	48%	-4.9%
- Charter	5.3	9%	6.6	11%	-20%	20.9	10%	25.1	10%	-17%
<b>North America</b>	<b>5.4</b>	<b>9%</b>	<b>6.0</b>	<b>10%</b>	<b>-9.4%</b>	<b>20.6</b>	<b>9%</b>	<b>22.5</b>	<b>9%</b>	<b>-8.5%</b>
- Scheduled	5.3	9%	5.7	9%	-8.2%	20.0	9%	21.7	9%	-7.6%
- Charter	0.1	0.2%	0.2	0.4%	-40%	0.6	0.3%	0.9	0.4%	-32%
<b>Rest of World</b>	<b>7.1</b>	<b>12%</b>	<b>7.1</b>	<b>12%</b>	<b>-0.5%</b>	<b>29.5</b>	<b>13%</b>	<b>30.4</b>	<b>13%</b>	<b>-2.9%</b>
- Scheduled	6.2	11%	6.1	10%	1.6%	25.3	11%	25.8	11%	-2.0%
- Charter	0.9	2%	1.1	2%	-13%	4.2	2%	4.5	2%	-7.9%
<b>Total</b>	<b>57.0</b>	<b>100%</b>	<b>61.9</b>	<b>100%</b>	<b>-7.9%</b>	<b>222.9</b>	<b>100%</b>	<b>239.6</b>	<b>100%</b>	<b>-7.0%</b>
- Scheduled	50.6	89%	53.9	87%	-6.2%	196.9	88%	208.8	87%	-5.7%
- Charter	6.5	11%	8.0	13%	-19%	26.0	12%	30.8	13%	-16%

Source: CAA Airport Statistics

Passenger numbers to Europe, North America, and the UK (domestic) fell by a similar percentage in quarter 2 2009 compared to quarter 2 2008 (around 9%) whereas travel to 'Rest of World' destinations (which made up 12% of total passengers) fell by relatively little (0.5%).



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

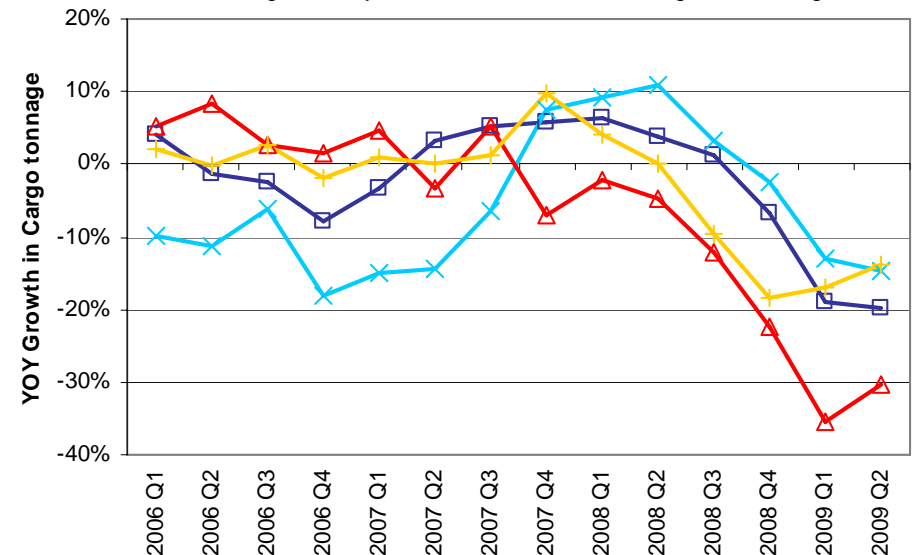
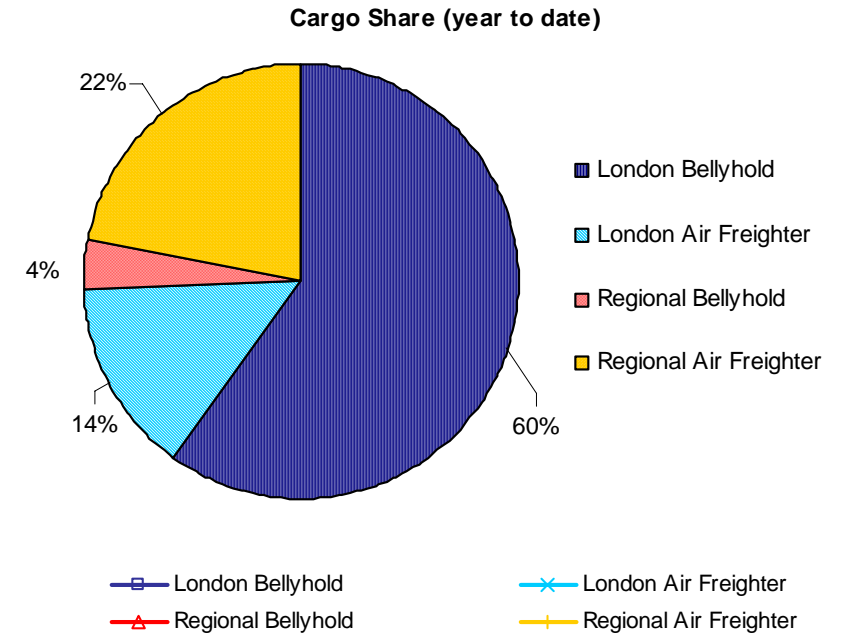
Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2009		Q2 2008		+/- %	Q3 08 – Q2 09		Q3 07 – Q2 08		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
<b>Cargo on cargo only flights</b>	<b>199</b>	<b>38%</b>	<b>232</b>	<b>36%</b>	<b>-14%</b>	<b>832</b>	<b>37%</b>	<b>944</b>	<b>36%</b>	<b>-12%</b>
London	78	15%	91	14%	-15%	329	14%	353	14%	-6.8%
Regional	121	23%	141	22%	-14%	502	22%	590	23%	-15%
<b>Bellyhold cargo</b>	<b>329</b>	<b>62%</b>	<b>414</b>	<b>64%</b>	<b>-20%</b>	<b>1,445</b>	<b>63%</b>	<b>1,642</b>	<b>64%</b>	<b>-12%</b>
London	311	59%	388	60%	-20%	1,363	60%	1,533	59%	-11%
Regional	18	3%	26	4%	-30%	82	4%	109	4%	-25%
<b>Total cargo</b>	<b>528</b>	<b>100%</b>	<b>646</b>	<b>100%</b>	<b>-18%</b>	<b>2,277</b>	<b>100%</b>	<b>2,586</b>	<b>100%</b>	<b>-12%</b>
London	389	74%	479	74%	-19%	1,693	74%	1,887	73%	-10%
Regional	139	26%	167	26%	-16%	584	26%	699	27%	-16%

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.

The quarterly year-on-year fall in cargo tonnage at UK airports, at 18% in quarter 2 2009, is the same as that seen in quarter 1 2009.

The fall in bellyhold cargo tonnage (20% in quarter 2) continues to exceed the fall in air freighter tonnage (14% in quarter 2).



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

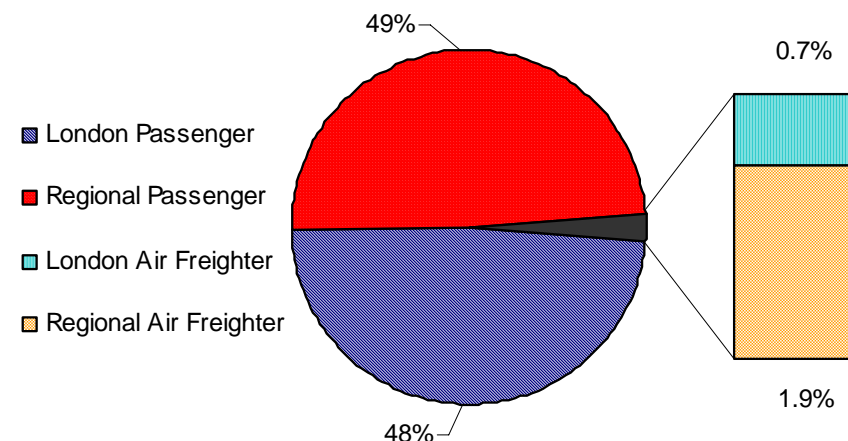
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2009		Q2 2008		+/- %	Q3 08 – Q2 09		Q3 07 – Q2 08		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>Air freighter</b>	<b>13</b>	<b>2%</b>	<b>15</b>	<b>3%</b>	<b>-15%</b>	<b>55</b>	<b>3%</b>	<b>61</b>	<b>3%</b>	<b>-9.0%</b>
London	4	1%	4	1%	-15%	15	1%	17	1%	-6.8%
Regional	9	2%	11	2%	-15%	40	2%	44	2%	-9.8%
<b>Passenger flights</b>	<b>515</b>	<b>98%</b>	<b>574</b>	<b>97%</b>	<b>-10%</b>	<b>2,054</b>	<b>97%</b>	<b>2,208</b>	<b>97%</b>	<b>-7.0%</b>
London	255	48%	277	47%	-7.8%	1,019	48%	1,075	47%	-5.3%
Regional	260	49%	298	50%	-13%	1,036	49%	1,133	50%	-8.6%
<b>Total flights</b>	<b>529</b>	<b>100%</b>	<b>590</b>	<b>100%</b>	<b>-10%</b>	<b>2,110</b>	<b>100%</b>	<b>2,269</b>	<b>100%</b>	<b>-7.0%</b>
London	259	49%	281	48%	-7.9%	1,034	49%	1,092	48%	-5.3%
Regional	270	51%	309	52%	-13%	1,076	51%	1,177	52%	-8.6%

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.

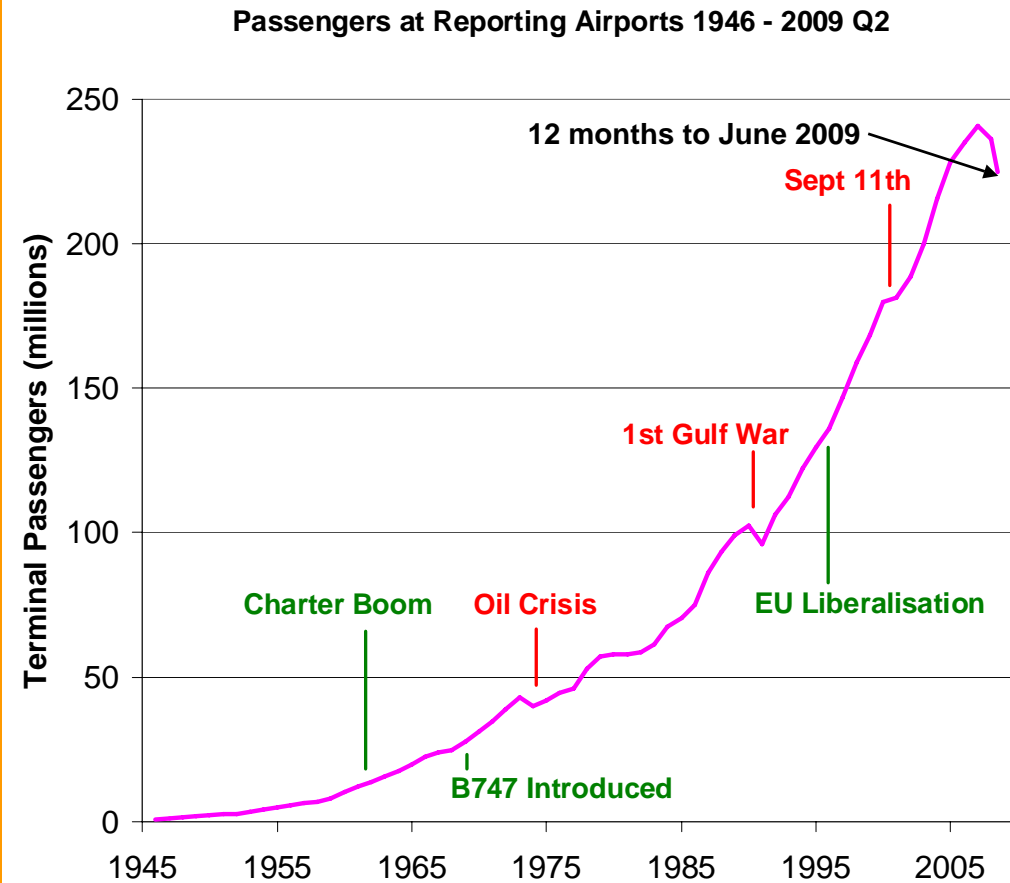
Total commercial flights in the UK decreased by 10% in quarter 2 2009 compared to quarter 2 2008, the same year-on-year fall as that observed in quarter 1 2009. The decline in air freighter flights (15%) was proportionately greater than that of passenger flights (10%).

Flights Share (year to date)





## Did you know? Passenger numbers at CAA reporting airports from 1946 <sup>12</sup>



Source: CAA Airport Statistics

Numbers of (civil) passengers at reporting airports have grown from nearly nothing in 1946 to just short of 250 million per annum in this decade. This growth has been fuelled not only by the increasing wealth of the UK and its trading and tourist partners, but also innovations and liberalisations such as the rise of the package holiday, the introduction of the Boeing 747 and the liberalisation of the EU internal air market.

Passenger growth has also been affected, albeit temporarily, by political and economic events such as the 1970s oil crisis, the 1990s recession and Gulf war and the terrorist attacks of 11 September 2001. The current recession has reduced passengers at reporting airports by around 8%, which already matches the total extent of the downturns in the early 1970s and 1990s, and, unlike those instances, looks likely to lead to a reduction in annual passenger numbers for two consecutive years.

## 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/aviationintelligence](http://www.caa.co.uk/aviationintelligence).
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, a category which excludes the Channel Island Airports – Jersey, Guernsey, and Alderney – and the Isle of Man, which are not formally part of the UK.
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 (these numbers are not adjusted for the double counting which occurs when both airports report arriving and departing passengers to the CAA);
  - 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.
12. Reporting airports are all those which report data to the CAA, and so, unlike other figures presented here, this may include data from the Channel Islands and Isle of Man airports. There are more reporting airports now than in previous years, but this is unlikely to significantly affect the data presented here.