

# *Aviation Trends*

## *Quarter 3 2009*



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## Introduction

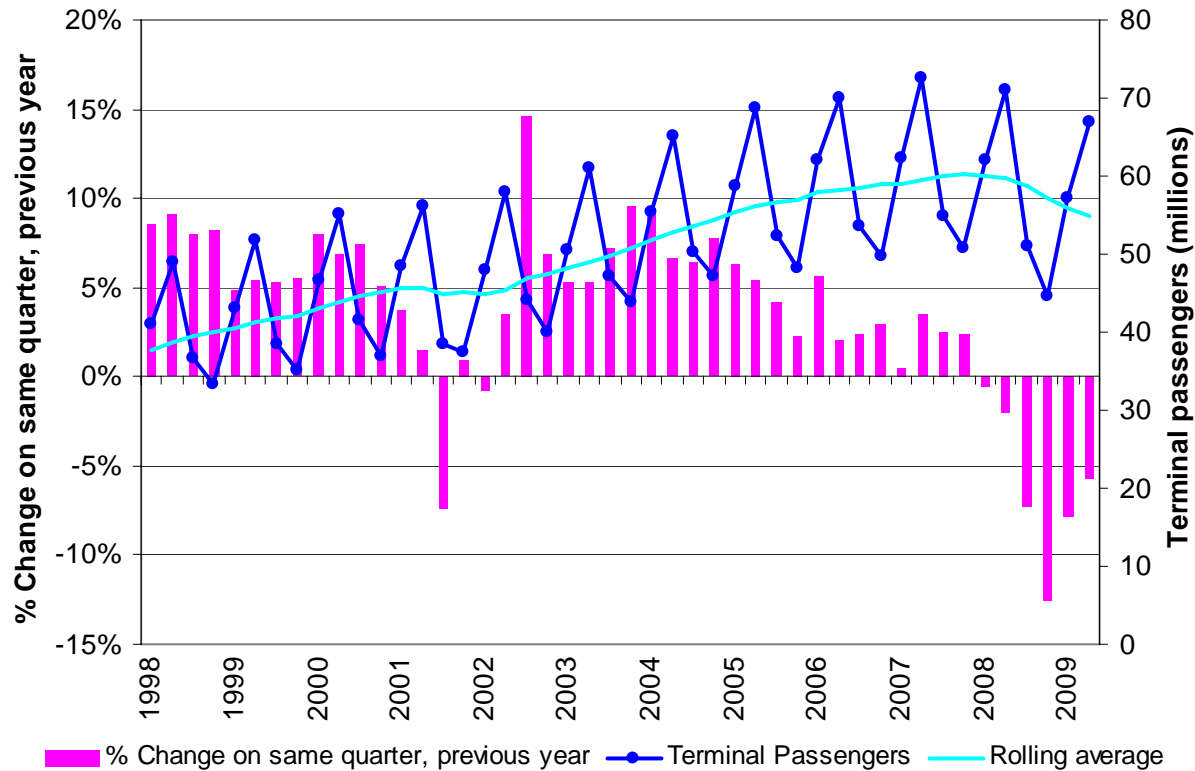
Welcome to Aviation Trends. Every quarter we update key figures which summarise the levels of activity at the UK's airports. Each edition also includes a section entitled 'Did you know?' which aims to present interesting facts derived from the various data sources available to the CAA; this time we take a look at gender differences between business passengers at UK airports.

In this edition of aviation trends, we show that the number of passengers, flights, and the cargo tonnage handled at UK airports continued to decline in quarter 3 2009 compared to 2008, albeit at a slower pace than in the previous two quarters.

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>



Source: CAA Airport Statistics

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 3 2009, with a 6% reduction, although the pace of contraction was smaller in quarter 3 2009 than in the previous three quarters.

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

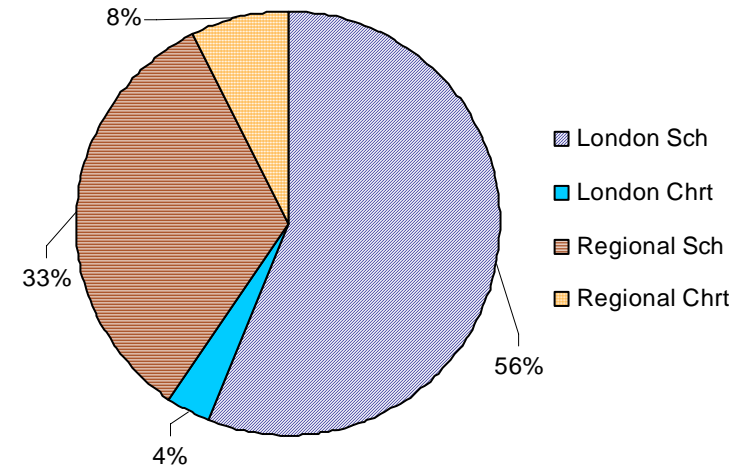
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2009		Q3 2008		+/- %	Q4 08 – Q3 09		Q4 07 – Q3 08		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>London Airports</b>	<b>39.0</b>	<b>58%</b>	<b>40.3</b>	<b>57%</b>	<b>-3.3%</b>	<b>130.3</b>	<b>60%</b>	<b>139.1</b>	<b>58%</b>	<b>-6.3%</b>
- Scheduled	36.0	54%	36.7	52%	-1.9%	122.6	56%	129.5	54%	-5.4%
- Charter	2.9	4%	3.6	5%	-17.5%	7.7	4%	9.5	4%	-19.2%
<b>Regional Airports</b>	<b>27.8</b>	<b>42%</b>	<b>30.6</b>	<b>43%</b>	<b>-9.0%</b>	<b>88.6</b>	<b>40%</b>	<b>99.1</b>	<b>42%</b>	<b>-10.6%</b>
- Scheduled	21.3	32%	22.8	32%	-6.6%	72.1	33%	79.1	33%	-8.9%
- Charter	6.5	10%	7.7	11%	-16.0%	16.5	8%	19.9	8%	-17.2%
<b>All Airports</b>	<b>66.8</b>	<b>100%</b>	<b>70.9</b>	<b>100%</b>	<b>-5.7%</b>	<b>218.8</b>	<b>100%</b>	<b>238.1</b>	<b>100%</b>	<b>-8.1%</b>
- Scheduled	57.4	86%	59.6	84%	-3.7%	194.7	89%	208.7	88%	-6.7%
- Charter	9.4	14%	11.3	16%	-16.5%	24.2	11%	29.4	12%	-17.9%

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

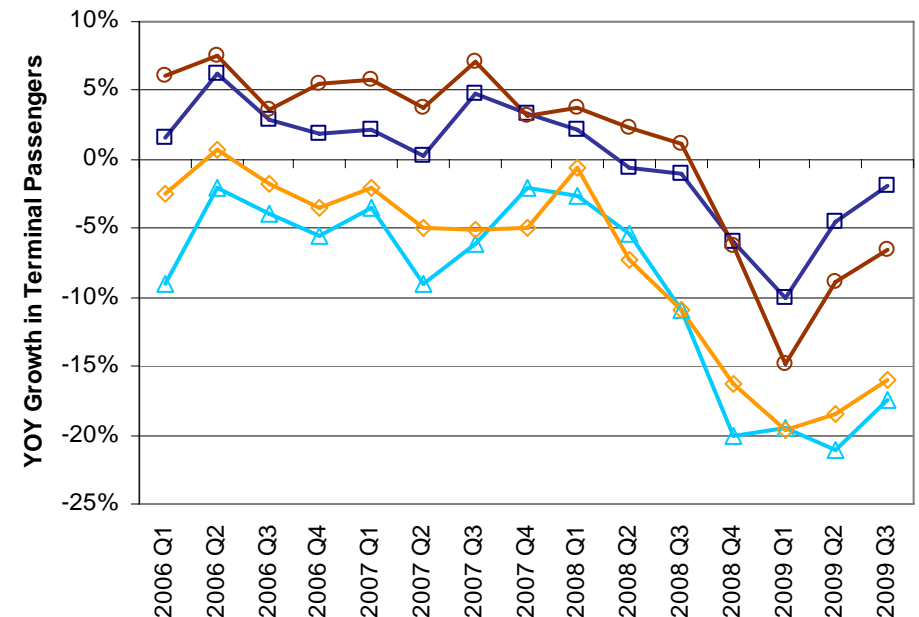
UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in the table and graph on this page therefore exclude transit passengers – those who remain aboard aircraft which land at a UK airport and then depart for another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

In quarter 3 2009 the decline in scheduled passengers at all airports was 3.7%, and the decline in charter passengers was 16.5%. The scheduled passenger drop was proportionately higher at regional airports (6.6%) than London airports (1.9%), while the charter passenger fall was proportionately lower at regional airports (16%) than at London airports (17.5%).

Passenger Share (year to date)



Legend: London Sch (blue square), London Chrt (cyan triangle), Regional Sch (brown circle), Regional Chrt (orange diamond)



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

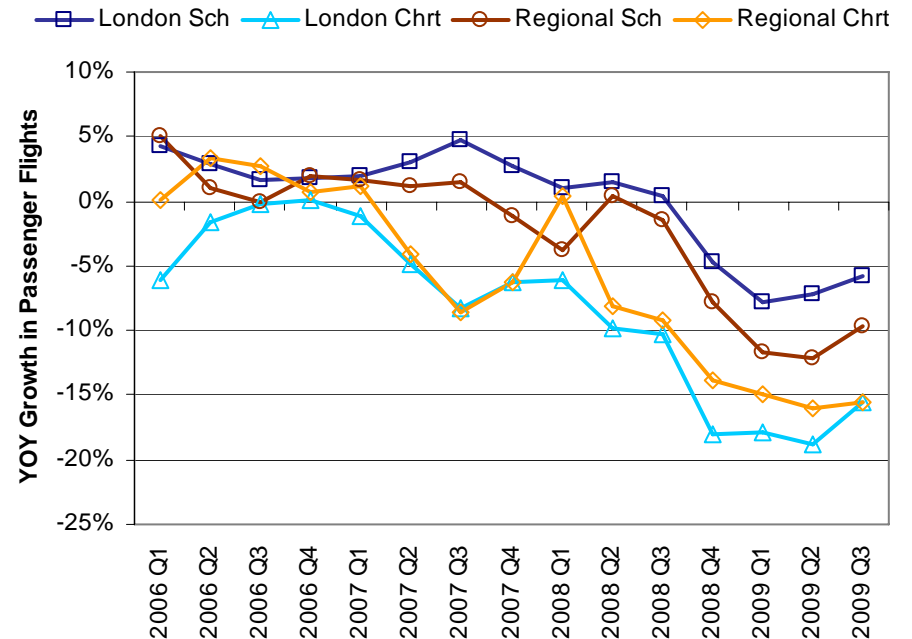
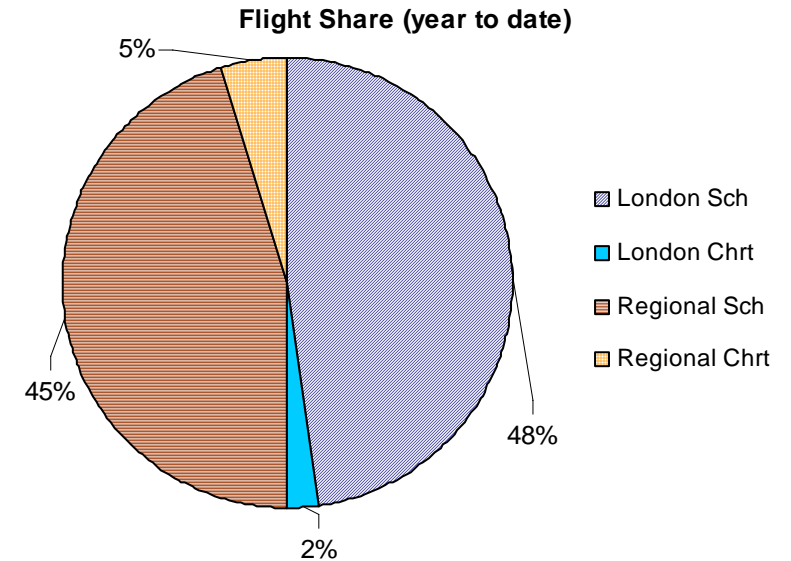
Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2009		Q3 2008			Q4 08 – Q3 09		Q4 07 – Q3 08		
	Flights (000s)	% of total	Flights (000s)	% of total	+/- %	Flights (000s)	% of total	Flights (000s)	% of total	+/- %
<b>London Airports</b>	<b>269.8</b>	<b>49%</b>	<b>288.5</b>	<b>48%</b>	<b>-6.5%</b>	<b>1,000.3</b>	<b>50%</b>	<b>1,074.6</b>	<b>49%</b>	<b>-6.9%</b>
- Scheduled	254.6	46%	270.5	45%	-5.9%	959.2	48%	1,024.9	47%	-6.4%
- Charter	15.2	3%	18.0	3%	-15.6%	41.1	2%	49.7	2%	-17.3%
<b>Regional Airports</b>	<b>278.2</b>	<b>51%</b>	<b>310.9</b>	<b>52%</b>	<b>-10.5%</b>	<b>1,003.8</b>	<b>50%</b>	<b>1,125.5</b>	<b>51%</b>	<b>-10.8%</b>
- Scheduled	243.3	44%	269.6	45%	-9.7%	909.9	45%	1,014.6	46%	-10.3%
- Charter	34.9	6%	41.3	7%	-15.6%	93.9	5%	110.9	5%	-15.3%
<b>All Airports</b>	<b>548.0</b>	<b>100%</b>	<b>599.4</b>	<b>100%</b>	<b>-8.6%</b>	<b>2,004.1</b>	<b>100%</b>	<b>2,200.1</b>	<b>100%</b>	<b>-8.9%</b>
- Scheduled	497.9	91%	540.0	90%	-7.8%	1,869.1	93%	2,039.5	93%	-8.4%
- Charter	50.1	9%	59.4	10%	-15.6%	135.0	7%	160.6	7%	-15.9%

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 3 2009 were down 8.6% (approximately 51,000) on quarter 3 2008. Rolling year flights fell 8.9%, which represents around 196,000 flights.

The fall in flight numbers was higher at regional airports (10.5%) than London airports (6.5%), and the fall in charter flights (15.6%) was proportionately greater than the fall in scheduled flights (7.8%).

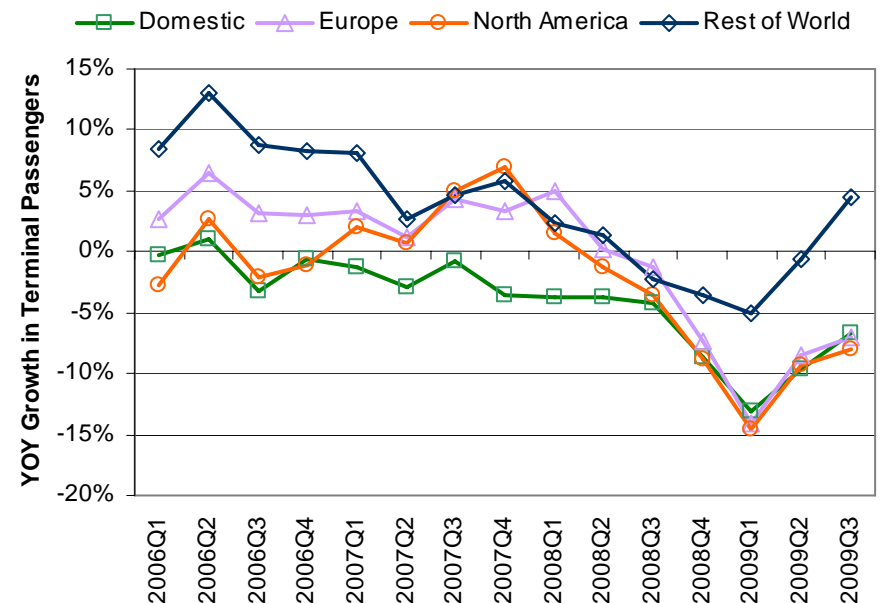
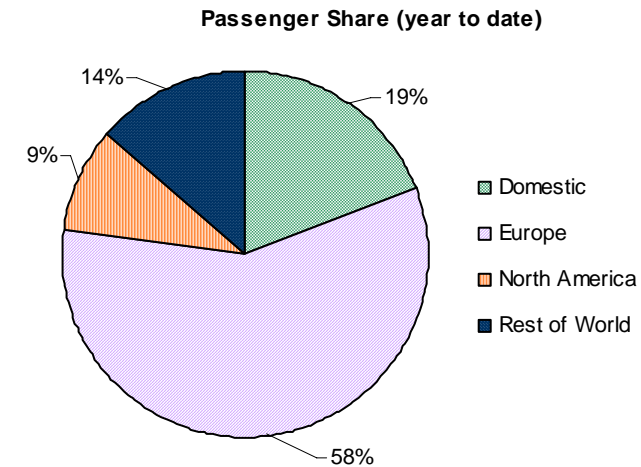


#### 4. Terminal passengers at UK airports by origin / destination<sup>6,7,8,9,11</sup>

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2009		Q3 2008		+/- %	Q4 08 – Q3 09		Q4 07 – Q3 08		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>Domestic</b>	11.4	17%	12.2	17%	-6.7%	41.9	19%	46.2	19%	-9.4%
- Scheduled	11.3	17%	12.1	17%	-6.7%	41.5	19%	45.9	19%	-9.5%
- Charter	0.1	0.1%	0.1	0.1%	-1.1%	0.3	0.2%	0.3	0.1%	4.5%
<b>Europe</b>	41.3	62%	44.3	63%	-6.9%	127.0	58%	139.4	59%	-8.9%
- Scheduled	33.1	50%	34.5	49%	-4.1%	107.8	49%	115.6	49%	-6.8%
- Charter	8.1	12%	9.8	14%	-17.0%	19.3	9%	23.8	10%	-19.0%
<b>North America</b>	6.0	9%	6.6	9%	-7.9%	20.1	9%	22.3	9%	-9.9%
- Scheduled	5.8	9%	6.3	9%	-6.5%	19.6	9%	21.5	9%	-8.7%
- Charter	0.2	0.3%	0.3	0.4%	-36.5%	0.5	0.2%	0.8	0.3%	-40.9%
<b>Rest of World</b>	8.1	12%	7.8	11%	4.4%	29.8	14%	30.2	13%	-1.2%
- Scheduled	7.1	11%	6.7	9%	6.4%	25.7	12%	25.7	11%	0.3%
- Charter	1.0	2%	1.1	2%	-7.6%	4.1	2%	4.5	2%	-9.6%
<b>Total</b>	66.8	100%	70.9	100%	-5.7%	218.8	100%	238.1	100%	-8.1%
- Scheduled	57.4	86%	59.6	84%	-3.7%	194.7	89%	208.7	88%	-6.7%
- Charter	9.4	14%	11.3	16%	-16.5%	24.2	11%	29.4	12%	-17.9%

Source: CAA Airport Statistics

Passenger numbers to Europe, North America, and the UK (domestic) fell by a similar percentage in quarter 3 2009 compared to quarter 3 2008 (7% to 8%) whereas travel to 'Rest of World' destinations (which made up 14% of total passengers) grew 4%.



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

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2009		Q3 2008		+/- %	Q4 08 – Q3 09		Q4 07 – Q3 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>203</b>	<b>36%</b>	<b>217</b>	<b>35%</b>	<b>-6.1%</b>	<b>821</b>	<b>37%</b>	<b>935</b>	<b>36%</b>	<b>-12.2%</b>
London	79	14%	89	14%	-10.3%	320	14%	356	14%	-10.1%
Regional	124	22%	128	20%	-3.2%	500	23%	578	22%	-13.5%
<b>Bellyhold cargo</b>	<b>366</b>	<b>64%</b>	<b>410</b>	<b>65%</b>	<b>-10.5%</b>	<b>1,402</b>	<b>63%</b>	<b>1,644</b>	<b>64%</b>	<b>-14.7%</b>
London	345	61%	384	61%	-10.0%	1,325	60%	1,538	60%	-13.9%
Regional	21	4%	26	4%	-19.0%	77	3%	105	4%	-26.8%
<b>Total cargo</b>	<b>570</b>	<b>100%</b>	<b>626</b>	<b>100%</b>	<b>-9.0%</b>	<b>2,223</b>	<b>100%</b>	<b>2,578</b>	<b>100%</b>	<b>-13.8%</b>
London	425	75%	472	75%	-10.0%	1,645	74%	1,895	73%	-13.2%
Regional	145	25%	154	25%	-5.9%	577	26%	684	27%	-15.6%

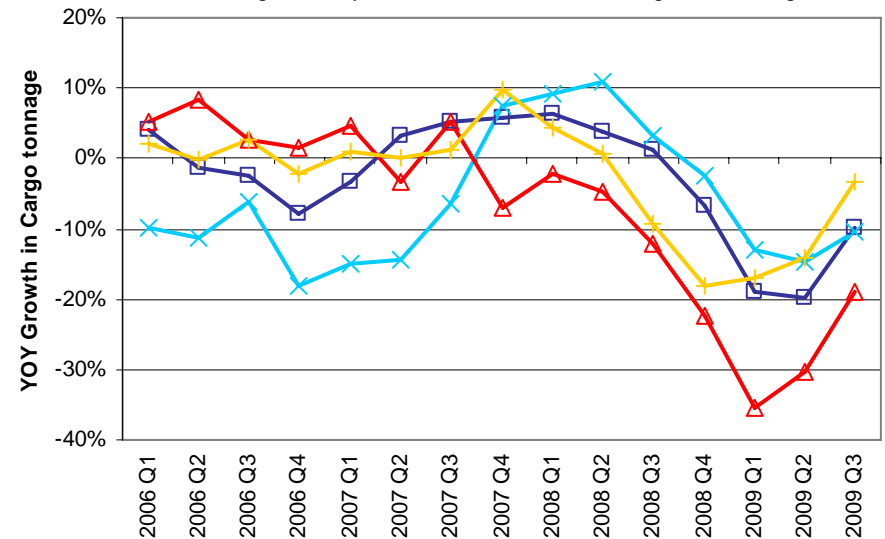
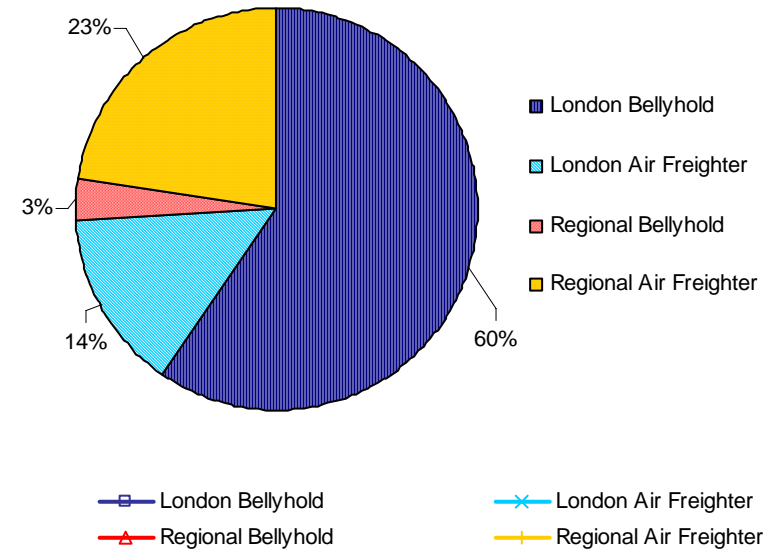
Source: CAA Airport Statistics

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 was 9% in quarter 3 2009.

The fall in bellyhold cargo tonnage (10.5% in quarter 3) continues to exceed the fall in air freighter tonnage (6.1% in quarter 3).

Cargo Share (year to date)



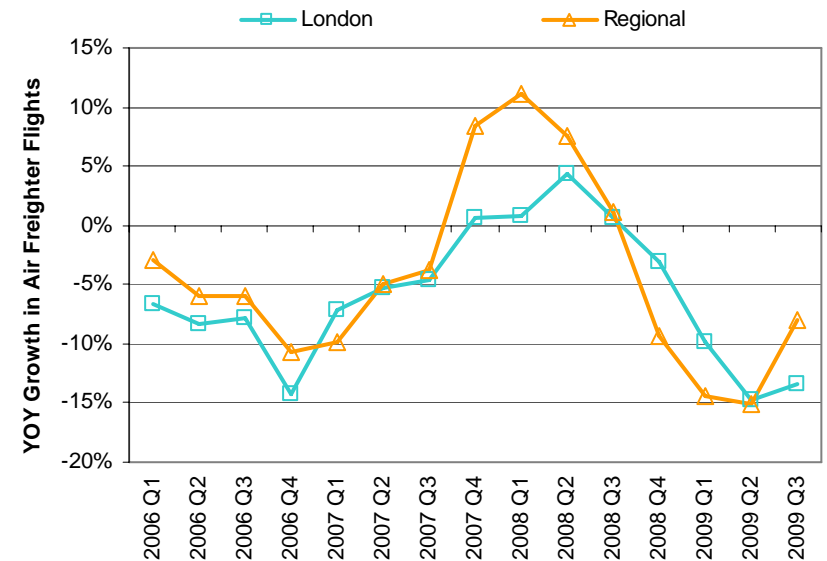
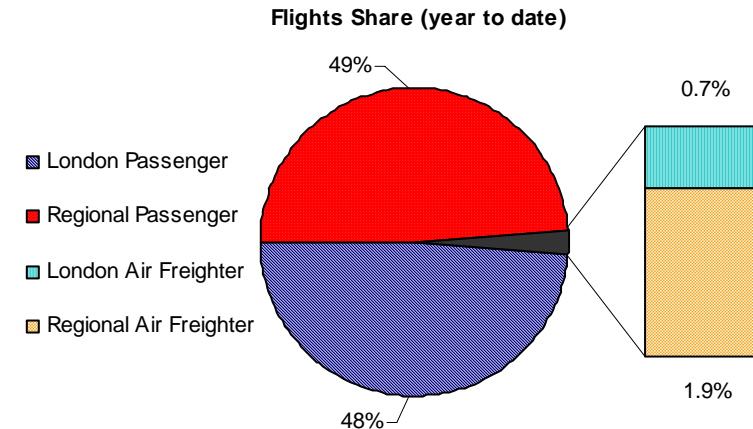
## 6. All commercial flights to and from UK airports<sup>5,7,10,11</sup>

Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2009		Q3 2008		+/- %	Q4 08 – Q3 09		Q4 07 – Q3 08		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>Air freighter</b>	14	2%	15	2%	-9.5%	54	3%	61	3%	-11.4%
London	4	1%	4	1%	-13.5%	15	1%	17	1%	-10.4%
Regional	10	2%	11	2%	-8.0%	39	2%	44	2%	-11.7%
<b>Passenger flights</b>	548	98%	599	98%	-8.6%	2,004	97%	2,200	97%	-8.9%
London	270	48%	289	47%	-6.5%	1,000	49%	1,075	48%	-6.9%
Regional	278	50%	311	51%	-10.5%	1,004	49%	1,126	50%	-10.8%
<b>Total flights</b>	562	100%	614	100%	-9.6%	2,058	100%	2,261	100%	-9.0%
London	273	49%	293	48%	-6.6%	1,015	49%	1,091	48%	-7.0%
Regional	288	51%	322	52%	-10.4%	1,043	51%	1,170	52%	-10.8%

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.

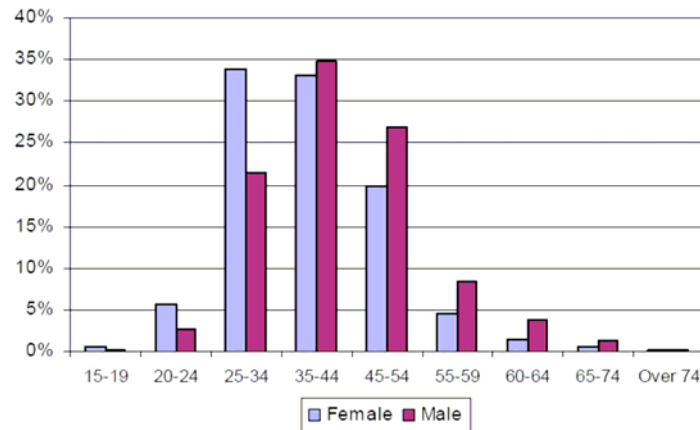
Total commercial flights in the UK decreased by 9.6% in quarter 3 2009 compared to quarter 3 2008. The decline in air freighter flights (9.5%) was proportionately greater than that of passenger flights (8.6%).





## Did you know? Gender Differences in Business Passengers at UK Airports

Age distribution of business passengers by gender in 2006

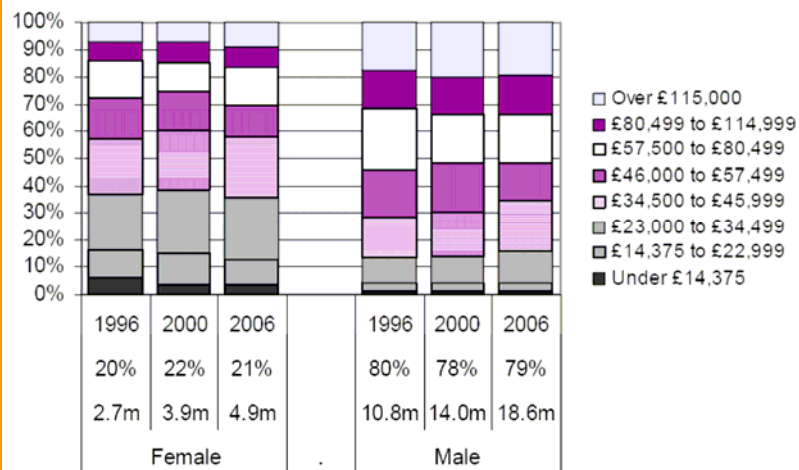


Business passengers (defined as those passengers travelling for business purposes, rather than simply those travelling business class) at UK airports tend to be predominantly male.

A recent CAA study\* into business passengers revealed that, at the London airports, women represented only 21% of all UK resident business passengers in 2006, barely changed from the equivalent figures for 1996 and 2000. Also relatively unchanged over this period (when considered in 2006 prices) are the income distributions for male and female business passengers, despite the number of such passengers increasing by around 75% between 1996 and 2006.

Data from all airports surveyed in 2006 (London, Belfast and the Midlands) indicates that female passengers travelling for business purposes tended to be younger, on average, than their male counterparts.

\*CAA, [UK Business Air Travel: Traffic Trends and Characteristics, May 2009](#)



Income distribution of UK residents by gender at London airports. (2006 prices)

Source: CAA Passenger Survey 1996, 2000, 2006

## 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.