

# *Aviation Trends*

## *Quarter 1 2009*



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## Introduction

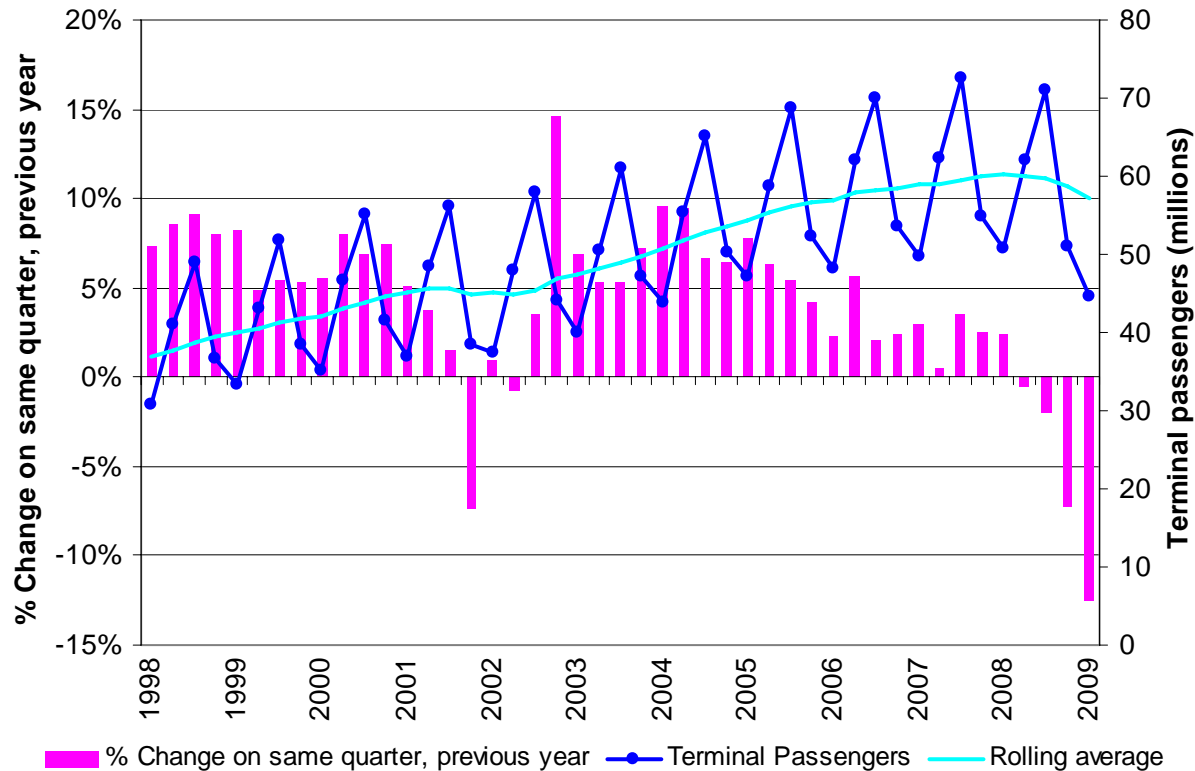
Welcome to Aviation Trends. Every quarter we update key figures which summarise the levels of activity at the UK's airports. Each edition also includes a section entitled 'Did you know?' which aims to present different interesting facts derived from the various data sources available to the CAA.

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.

The first three months of 2009 have seen the number of passengers and flights at UK airports continue to decline. Whilst this was largely due to the continued world economic crisis, there are also other causes. First, 2008 was a leap year, so its first quarter contained one day more than quarter 1 2009 (91 days vs 90 days), which would be expected to lower traffic by around 1% in January to March 2009 compared to the same months in 2008. Second, the 2008 Easter holidays were in March, whereas in 2009, they were in April, and so the associated increase in aviation activity as more people travel for holidays or to visit family or friends fell outside quarter 1 this year.

## 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.

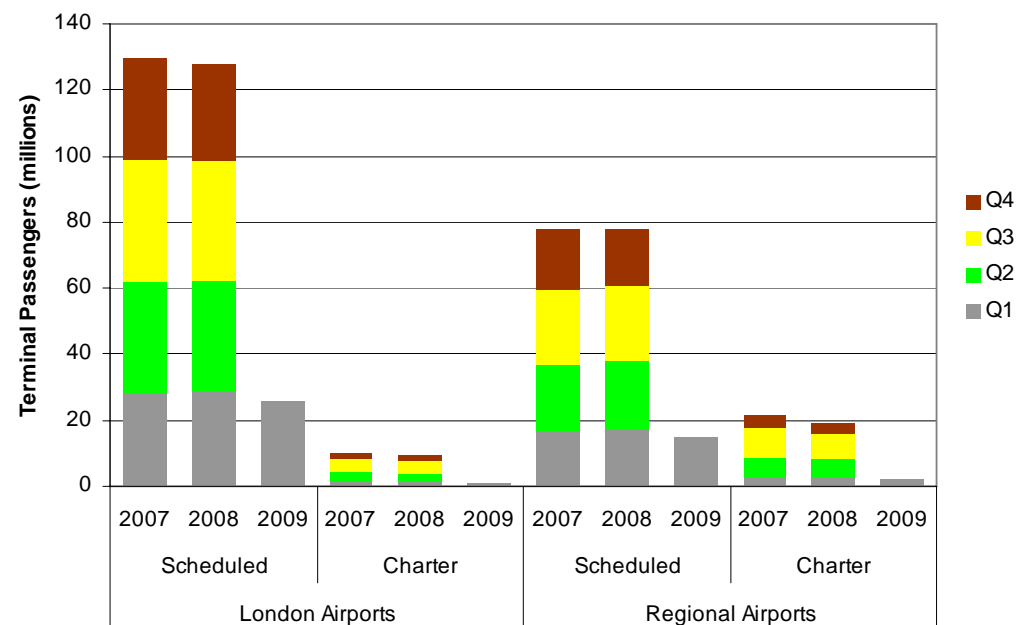
The dark blue line shows the number of terminal passengers at UK airports in each quarter (on the right axis). The bright blue line shows the same, but for the rolling annual average in each quarter.

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 1 2009, with a 13% reduction. The rolling annual total of passengers at UK airports is now back to the level it reached in early 2006.

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

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2009		Q1 2008		+/- %	Q2 08 – Q1 09		Q2 07 – Q1 08		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>London Airports</b>	<b>27.3</b>	<b>62%</b>	<b>30.5</b>	<b>60%</b>	<b>-11%</b>	<b>133.6</b>	<b>59%</b>	<b>140.2</b>	<b>58%</b>	<b>-4.7%</b>
- Scheduled	25.9	59%	28.9	57%	-10%	124.8	55%	130.1	54%	-4.1%
- Charter	1.4	3%	1.7	3%	-19%	8.8	4%	10.1	4%	-13%
<b>Regional Airports</b>	<b>17.0</b>	<b>38%</b>	<b>20.1</b>	<b>40%</b>	<b>-15%</b>	<b>94.2</b>	<b>41%</b>	<b>99.7</b>	<b>42%</b>	<b>-5.6%</b>
- Scheduled	14.7	33%	17.3	34%	-15%	75.4	33%	78.4	33%	-3.8%
- Charter	2.3	5%	2.9	6%	-20%	18.8	8%	21.3	9%	-12%
<b>All Airports</b>	<b>44.3</b>	<b>100%</b>	<b>50.7</b>	<b>100%</b>	<b>-13%</b>	<b>227.8</b>	<b>100%</b>	<b>239.9</b>	<b>100%</b>	<b>-5.1%</b>
- Scheduled	40.6	92%	46.1	91%	-12%	200.2	88%	208.5	87%	-4.0%
- Charter	3.7	8%	4.6	9%	-20%	27.6	12%	31.4	13%	-12%



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.

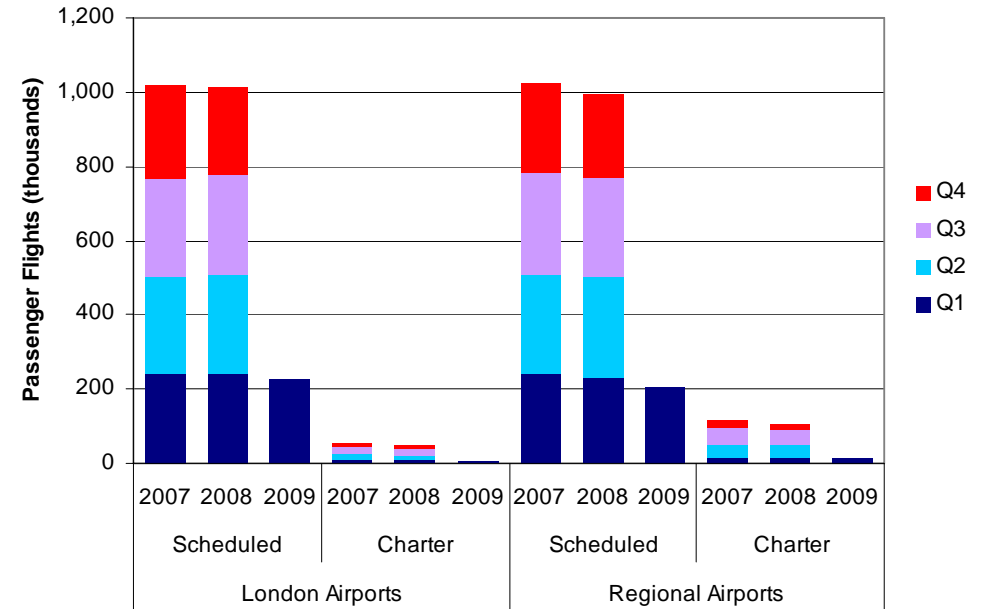
Total terminal passengers at UK airports in quarter 1 2009 were down 13% (6.4 million) on quarter 1 2008. Passenger numbers at regional airports fell by 15%, faster than at London airports which were down 11%. Charter traffic fell by around 20% at both London and regional airports compared to quarter 1 2008.

Rolling year passenger numbers at UK airports fell 5.1% (12 million) in January to March 2009 compared to the same period in 2008, with regional airports suffering a greater fall in passengers than London airports and charter traffic suffering more than scheduled traffic, as in quarter 1 2009.

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

Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2009		Q1 2008		+/- %	Q2 08 – Q1 09		Q2 07 – Q1 08		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>London Airports</b>	<b>230.9</b>	<b>51%</b>	<b>251.3</b>	<b>50%</b>	<b>-8.1%</b>	<b>1,040.6</b>	<b>49%</b>	<b>1,073.1</b>	<b>49%</b>	<b>-3.0%</b>
- Scheduled	223.6	50%	242.5	48%	-7.8%	994.3	47%	1,019.9	46%	-2.5%
- Charter	7.2	2%	8.8	2%	-18%	46.3	2%	53.2	2%	-13%
<b>Regional Airports</b>	<b>220.7</b>	<b>49%</b>	<b>250.3</b>	<b>50%</b>	<b>-12%</b>	<b>1,073.9</b>	<b>51%</b>	<b>1,135.2</b>	<b>51%</b>	<b>-5.4%</b>
- Scheduled	206.1	46%	233.1	46%	-12%	968.6	46%	1,017.5	46%	-4.8%
- Charter	14.6	3%	17.2	3%	-15%	105.3	5%	117.8	5%	-11%
<b>All Airports</b>	<b>451.6</b>	<b>100%</b>	<b>501.6</b>	<b>100%</b>	<b>-10%</b>	<b>2,114.5</b>	<b>100%</b>	<b>2,208.4</b>	<b>100%</b>	<b>-4.3%</b>
- Scheduled	429.7	95%	475.6	95%	-9.7%	1,962.8	93%	2,037.4	92%	-3.7%
- Charter	21.8	5%	26.0	5%	-16%	151.6	7%	171.0	8%	-11%

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 1 2009 were down 10% (approximately 50,000) on quarter 1 2008. Rolling year flights fell 4.3%, which represents around 94,000 flights.

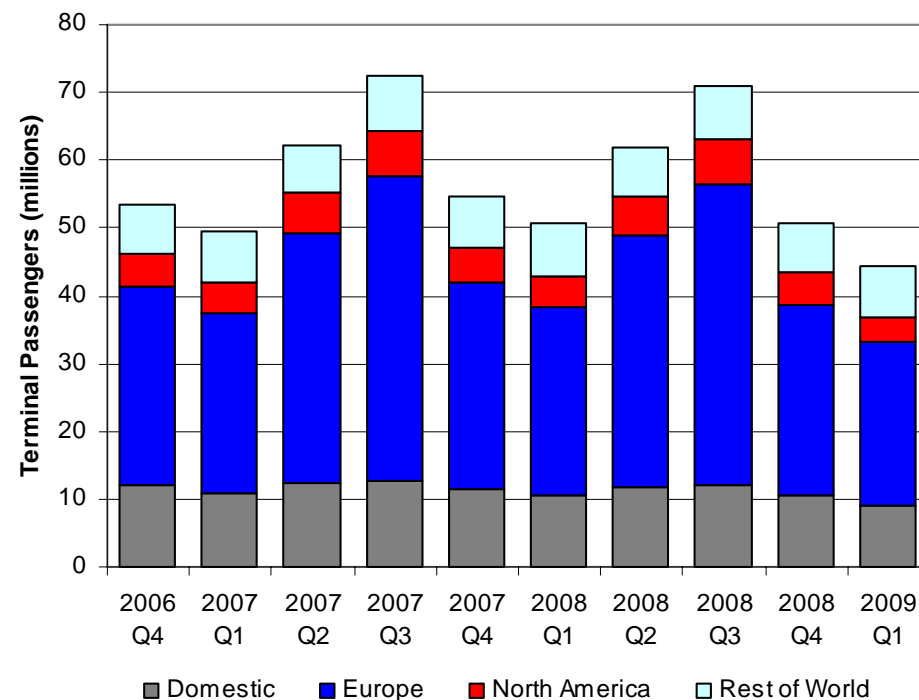
#### 4. Terminal passengers at UK airports by origin / destination<sup>6,7,8,9,11</sup>

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2009		Q1 2008		+/- %	Q2 08 – Q1 09		Q2 07 – Q1 08		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>Domestic</b>	<b>9.2</b>	<b>21%</b>	<b>10.6</b>	<b>21%</b>	<b>-13%</b>	<b>43.8</b>	<b>19%</b>	<b>47.2</b>	<b>20%</b>	<b>-7.2%</b>
- Scheduled	9.1	21%	10.5	21%	-13%	43.5	19%	46.9	20%	-7.2%
- Charter	0.1	0.2%	0.1	0.1%	6.0%	0.3	0.1%	0.3	0.1%	0.1%
<b>Europe</b>	<b>24.0</b>	<b>54%</b>	<b>27.9</b>	<b>55%</b>	<b>-14%</b>	<b>133.3</b>	<b>59%</b>	<b>139.9</b>	<b>58%</b>	<b>-4.7%</b>
- Scheduled	21.5	49%	24.7	49%	-13%	111.0	49%	114.2	48%	-2.8%
- Charter	2.4	5%	3.2	6%	-23%	22.3	10%	25.7	11%	-13%
<b>North America</b>	<b>3.8</b>	<b>9%</b>	<b>4.5</b>	<b>9%</b>	<b>-15%</b>	<b>21.2</b>	<b>9%</b>	<b>22.6</b>	<b>9%</b>	<b>-6.4%</b>
- Scheduled	3.8	9%	4.4	9%	-13%	20.5	9%	21.7	9%	-5.7%
- Charter	0.0	0.1%	0.1	0%	-60%	0.7	0.3%	0.9	0.4%	-23%
<b>Rest of World</b>	<b>7.3</b>	<b>17%</b>	<b>7.7</b>	<b>15%</b>	<b>-5.0%</b>	<b>29.5</b>	<b>13%</b>	<b>30.3</b>	<b>13%</b>	<b>-2.5%</b>
- Scheduled	6.2	14%	6.5	13%	-4.7%	25.2	11%	25.7	11%	-2.0%
- Charter	1.1	2%	1.2	2%	-7.0%	4.3	2%	4.5	2%	-4.9%
<b>Total</b>	<b>44.3</b>	<b>100%</b>	<b>50.7</b>	<b>100%</b>	<b>-13%</b>	<b>227.8</b>	<b>100%</b>	<b>239.9</b>	<b>100%</b>	<b>-5.1%</b>
- Scheduled	40.6	92%	46.1	91%	-12%	200.2	88%	208.5	87%	-4.0%
- Charter	3.7	8%	4.6	9%	-20%	27.6	12%	31.4	13%	-12%

Source: CAA Airport Statistics

Passenger numbers to all destination groups fell in quarter 1 2009, with North American traffic suffering the greatest percentage decline – of 15% compared to quarter 1 2008.

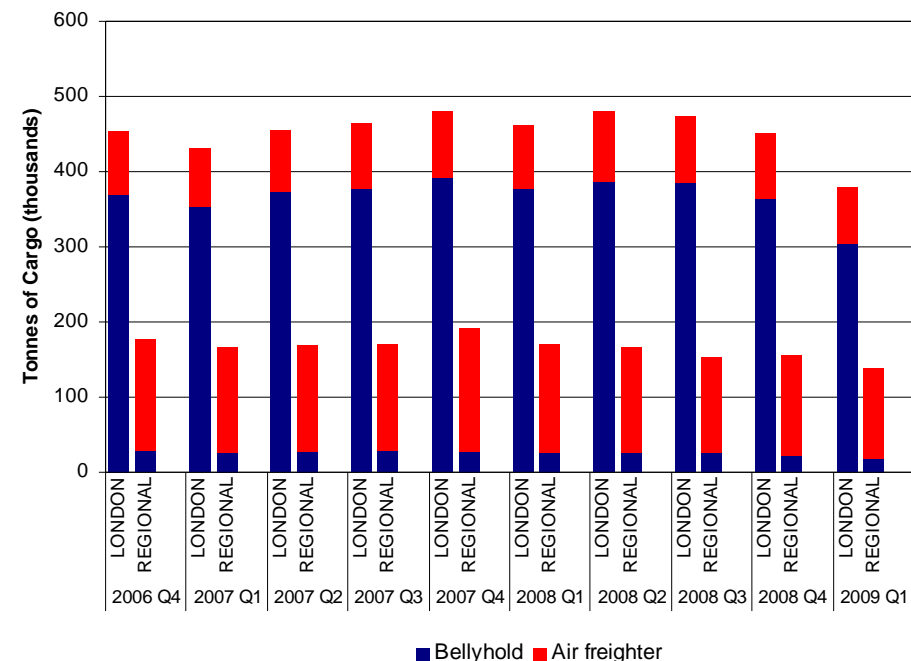
Similarly, in the rolling year, passenger numbers to all destination groups fell. Despite representing the first full year of the EU-US Open Skies agreement, passenger numbers on North American routes were down by 6.4% compared with the year to March 2008.



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

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2009		Q1 2008		+/- %	Q2 08 – Q1 09		Q2 07 – Q1 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>196</b>	<b>38%</b>	<b>231</b>	<b>36%</b>	<b>-15%</b>	<b>867</b>	<b>36%</b>	<b>935</b>	<b>36%</b>	<b>-7.2%</b>
London	74	14%	85	13%	-13%	343	14%	344	13%	-0.4%
Regional	122	23%	146	23%	-17%	524	22%	590	23%	-11%
<b>Bellyhold cargo</b>	<b>322</b>	<b>62%</b>	<b>403</b>	<b>64%</b>	<b>-20%</b>	<b>1,530</b>	<b>64%</b>	<b>1,629</b>	<b>64%</b>	<b>-6.1%</b>
London	305	59%	377	59%	-19%	1,440	60%	1,519	59%	-5.2%
Regional	17	3%	26	4%	-35%	90	4%	110	4%	-18%
<b>Total cargo</b>	<b>518</b>	<b>100%</b>	<b>634</b>	<b>100%</b>	<b>-18%</b>	<b>2,397</b>	<b>100%</b>	<b>2,564</b>	<b>100%</b>	<b>-6.5%</b>
London	379	73%	462	73%	-18%	1,783	74%	1,864	73%	-4.3%
Regional	138	27%	172	27%	-20%	614	26%	700	27%	-12%

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.

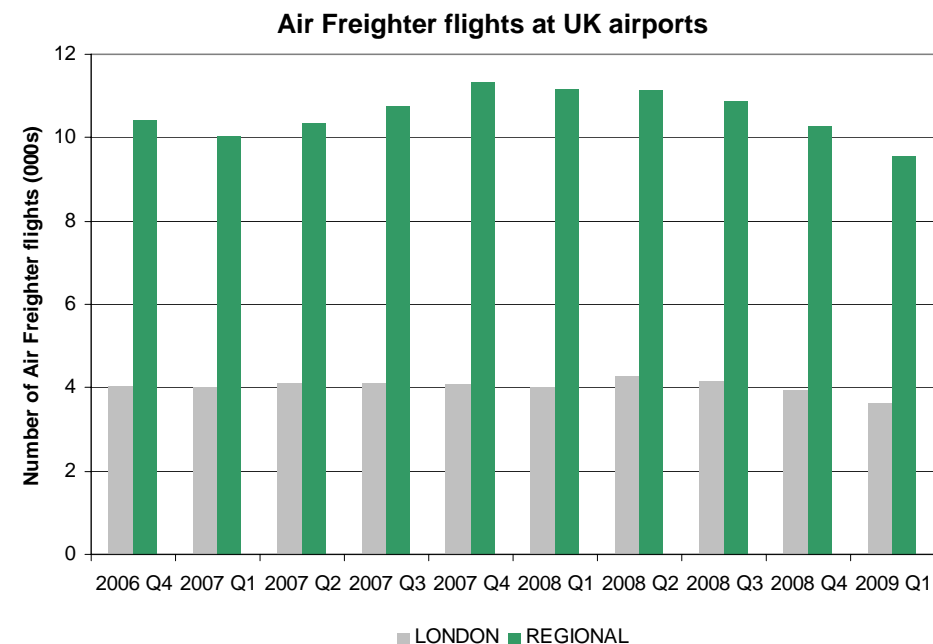
The total volume of air cargo at the UK's airports fell by 18% (116 tonnes) in quarter 1 2009 compared to quarter 1 2008. Similar percentage reductions in cargo volume occurred in both London and the regions for the quarter. Bellyhold cargo volumes fell 20% (81 tonnes) in quarter 1 2009, more than the 15% fall in volume on cargo only flights (35 tonnes).

For the year to March 2009, cargo volumes at UK airports fell by 6.5% (167 tonnes) compared to the previous year. Air cargo volumes at regional airports fell by more (12% or 86 tonnes) than those at London airports (4% or 81 tonnes) over the rolling 12 months.

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

Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2009		Q1 2008		+/- %	Q2 08 – Q1 09		Q2 07 – Q1 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>3%</b>	<b>15</b>	<b>3%</b>	<b>-13%</b>	<b>58</b>	<b>3%</b>	<b>60</b>	<b>3%</b>	<b>-3.5%</b>
London	4	1%	4	1%	-9.8%	16	1%	16	1%	-1.9%
Regional	10	2%	11	2%	-14%	42	2%	44	2%	-4.1%
<b>Passenger flights</b>	<b>452</b>	<b>97%</b>	<b>502</b>	<b>97%</b>	<b>-10%</b>	<b>2,114</b>	<b>97%</b>	<b>2,208</b>	<b>97%</b>	<b>-4.3%</b>
London	231	50%	251	49%	-8.1%	1,041	48%	1,073	47%	-3.0%
Regional	221	47%	250	48%	-12%	1,074	49%	1,135	50%	-5.4%
<b>Total flights</b>	<b>465</b>	<b>100%</b>	<b>517</b>	<b>100%</b>	<b>-10%</b>	<b>2,172</b>	<b>100%</b>	<b>2,268</b>	<b>100%</b>	<b>-4.2%</b>
London	234	50%	255	49%	-8.1%	1,057	49%	1,089	48%	-3.0%
Regional	230	50%	261	51%	-12%	1,116	51%	1,179	52%	-5.4%

Source: CAA Airport Statistics



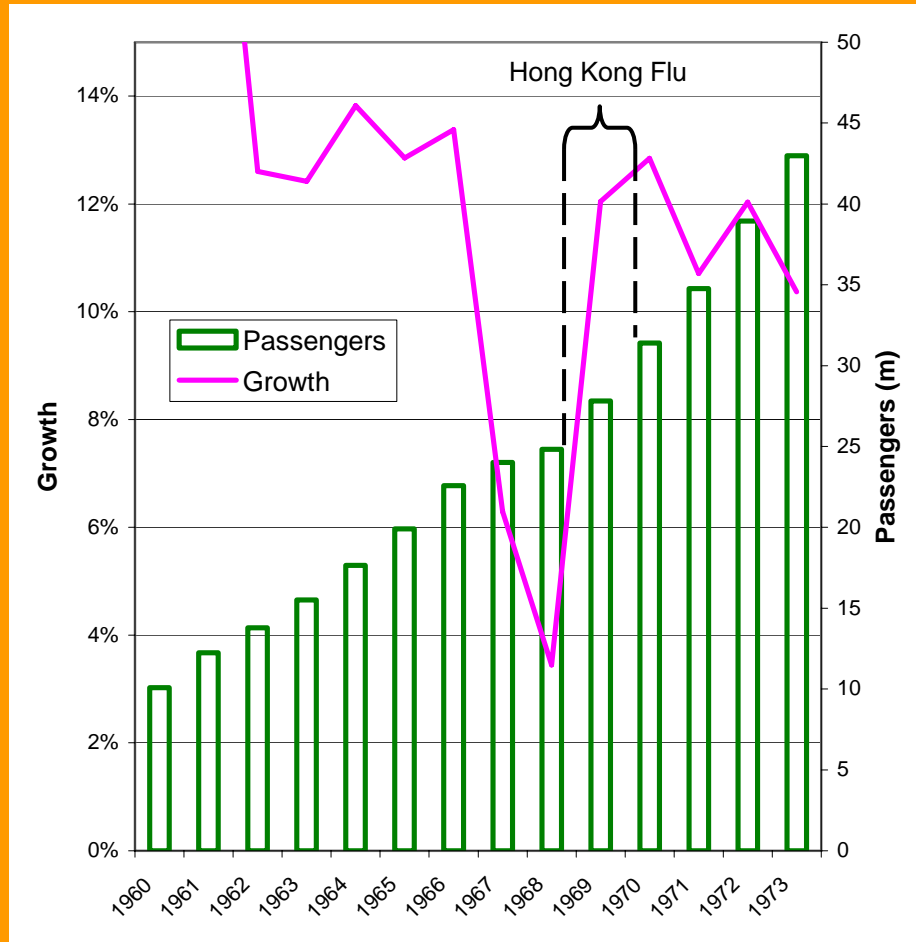
The number of commercial flights at reporting UK airports is a measure of commercial aviation activity in the UK. It includes both passenger and cargo flights, but excludes military flights, general aviation and aircraft that pass through UK airspace without landing.

Total commercial flights in the UK decreased by 10% in quarter 1 2009 compared to quarter 1 2008. The decline in air freighter flights was slightly greater than that of passenger flights, and the percentage decrease for both air freighter and passenger flights was larger at regional airports than at the London airports.

For the rolling year, the number of air freighter flights fell by 3.5%, whereas the number of passenger flights fell by 4.3%, which drove the 4.2% fall in total commercial flight numbers.



## Did you know? The 1968 Hong Kong Flu pandemic and UK air travel



Source: CAA Airport Statistics

Hong Kong flu, the last major pandemic, occurred in 1968-69, and UK fatalities during this time have been estimated at over 30,000 (source: hpa website).

Growth in passenger numbers at UK airports was over 12% per annum through the early 1960s, with the end of post-war austerity fuelling the boom in charter holidays. However, during 1967 and 1968 passenger numbers grew at a significantly reduced rate, before recovering to near former growth levels between 1969 and 1973. Both 1967 and 1968 were economically turbulent in the UK, with devaluation of the pound in 1967 and increased taxes and interest rates, whilst in the Middle East 1967 saw the outbreak of the six-day war.

The first UK cases of Hong Kong flu were reported in September 1968, so the slowdown in traffic growth in 1967 and 1968 is most likely to have been due to economic or other factors, with the flu pandemic probably having only a minor effect on air traffic. Even so, the UK aviation industry is sufficiently different now that the effects of any new pandemic may not be the same as that in the 1960s.

## 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.