

Aviation Trends

Quarter 2 2010



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Introduction

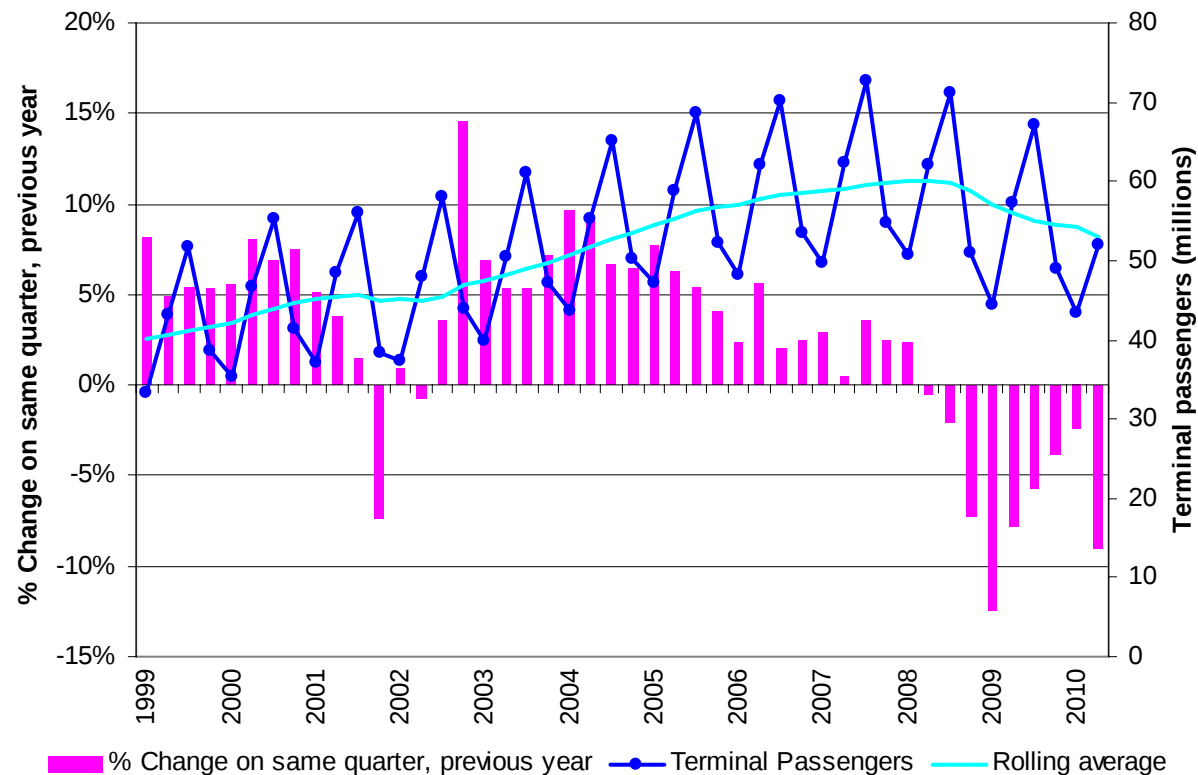
Welcome to Aviation Trends. Every quarter we update key figures which summarise the levels of activity at the UK's airports. Each edition also includes a section entitled 'Did you know?' which aims to present interesting facts derived from the various data sources available to the CAA; this time we show how the journey purpose of UK resident passengers on scheduled and charter services at the largest airports has changed since 2000.

In this edition of aviation trends, we show that the number of passengers, flights, and the cargo tonnage handled at UK airports declined in quarter 2 2010 compared to 2009. This decline was bigger than in previous quarters mainly due to volcanic activity during April 2010, and the threat of industrial action through the quarter.

The Aviation Trends series is available at 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^{6,11}



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 increased in quarter 2 2010, with the 9% reduction in large part due to volcanic activity during April 2010, and the threat of industrial action through the quarter.

2. Terminal passengers at UK airports^{5,6,7,11}

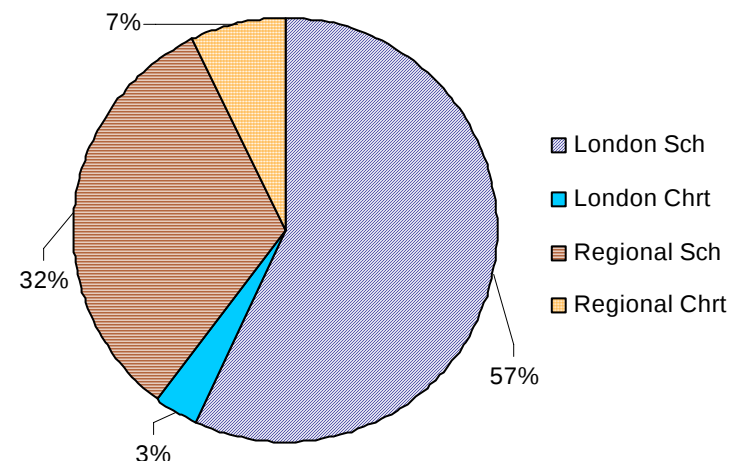
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2010		Q2 2009		+/- %	Q3 09 – Q2 10		Q3 08 – Q2 09		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
London Airports	30.7	59%	33.6	59%	-8.5%	127.1	60%	131.6	59%	-3.4%
- Scheduled	29.0	56%	31.7	56%	-8.6%	120.0	57%	123.3	55%	-2.7%
- Charter	1.8	3%	1.9	3%	-7.6%	7.1	3%	8.3	4%	-14.7%
Regional Airports	21.1	41%	23.4	41%	-9.9%	83.4	40%	91.3	41%	-8.7%
- Scheduled	16.9	33%	18.9	33%	-10.6%	68.0	32%	73.6	33%	-7.6%
- Charter	4.2	8%	4.5	8%	-7.3%	15.4	7%	17.7	8%	-13.2%
All Airports	51.8	100%	57.0	100%	-9.1%	210.5	100%	222.9	100%	-5.6%
- Scheduled	45.8	88%	50.6	89%	-9.3%	188.0	89%	196.9	88%	-4.5%
- Charter	6.0	12%	6.5	11%	-7.4%	22.5	11%	26.0	12%	-13.7%

Source: CAA Airport Statistics³

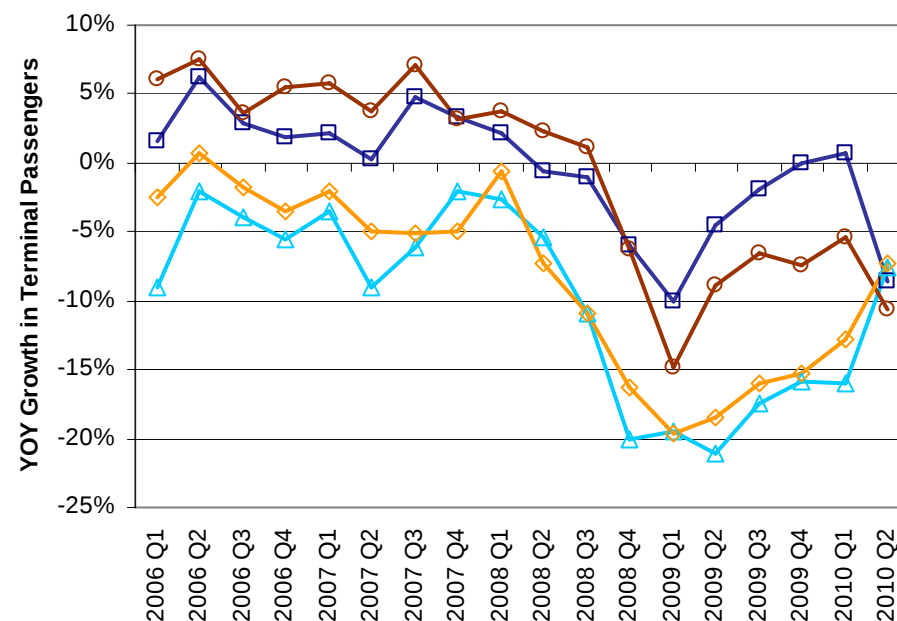
UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in the table and graph on this page therefore exclude transit passengers – those who remain aboard aircraft which land at a UK airport and then depart for another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

In quarter 2 2010 the decline in scheduled passengers at all airports was 9.3%, and the decline in charter passengers was 7.4%. The number of scheduled passengers at regional airports fell by 10.6% in quarter 2 2010, whereas London airports saw an 8.6% decline. The charter passenger fall was similar at regional airports (7.3%) and at London airports (7.6%).

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^{5,7,11}

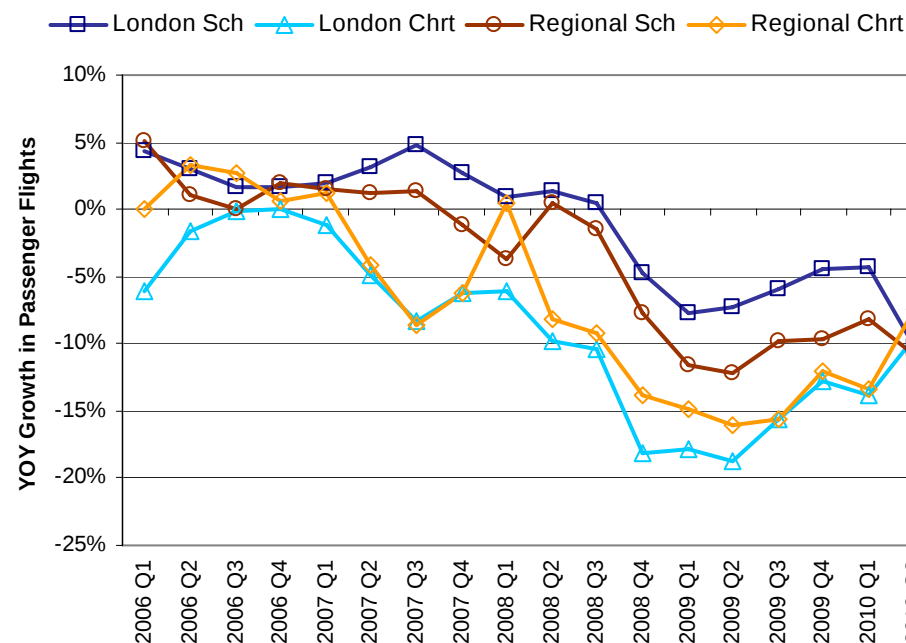
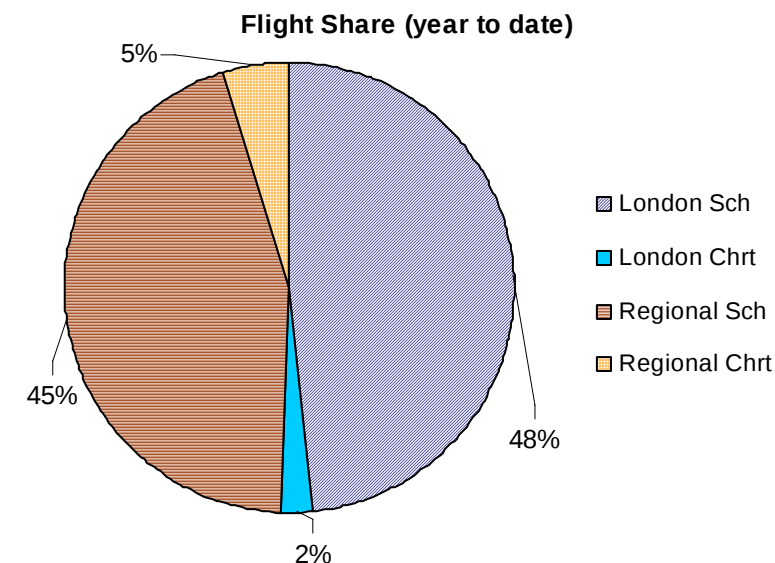
Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2010		Q2 2009		+/- %	Q3 09 – Q2 10		Q3 08 – Q2 09		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
London Airports	229.4	50%	255.4	49%	-10.2%	952.0	51%	1,019.0	50%	-6.6%
- Scheduled	219.9	48%	244.9	47%	-10.2%	914.0	48%	975.1	47%	-6.3%
- Charter	9.5	2%	10.5	2%	-9.6%	38.0	2%	43.9	2%	-13.4%
Regional Airports	233.0	50%	260.5	51%	-10.6%	933.2	49%	1,036.5	50%	-10.0%
- Scheduled	209.2	45%	234.8	46%	-10.9%	845.3	45%	936.1	46%	-9.7%
- Charter	23.8	5%	25.7	5%	-7.4%	87.8	5%	100.4	5%	-12.5%
All Airports	462.4	100%	515.9	100%	-10.4%	1,885.2	100%	2,055.5	100%	-8.3%
- Scheduled	429.2	93%	479.7	93%	-10.5%	1,759.3	93%	1,911.2	93%	-7.9%
- Charter	33.3	7%	36.2	7%	-8.1%	125.9	7%	144.3	7%	-12.8%

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 2010 were down 10.4% (approximately 53,500) on quarter 2 2009. Rolling year flights fell 8.3%, which represents around 170,300 flights.

The fall in flight numbers was similar at regional airports (10.6%) and at London airports (10.2%), and the fall in charter flights (8.1%) was proportionately smaller than the fall in scheduled flights (10.5%).

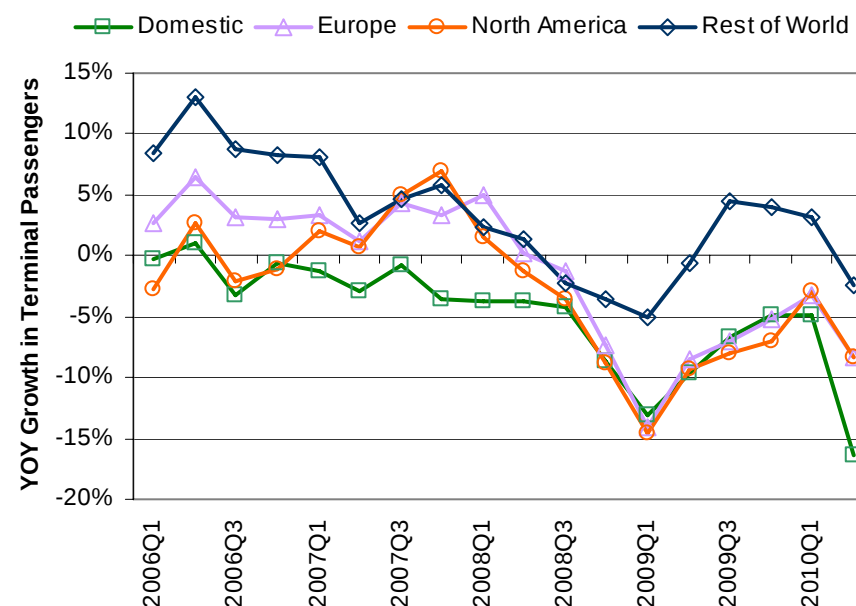
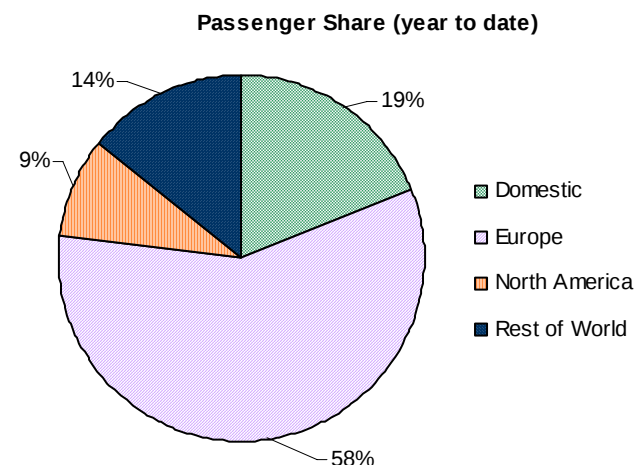


4. Terminal passengers at UK airports by origin / destination^{6,7,8,9,11}

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2010		Q2 2009		± %	Q3 09 – Q2 10		Q3 08 – Q2 09		± %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
Domestic	9.0	17%	10.7	19%	-16.4%	39.1	19%	42.7	19%	-8.3%
- Scheduled	8.9	17%	10.6	19%	-16.5%	38.8	18%	42.3	19%	-8.3%
- Charter	0.1	0.2%	0.1	0.1%	-0.9%	0.3	0.2%	0.3	0.1%	1.3%
Europe	31.0	60%	33.8	59%	-8.4%	122.0	58%	130.1	58%	-6.3%
- Scheduled	26.1	50%	28.5	50%	-8.5%	104.0	49%	109.2	49%	-4.8%
- Charter	4.9	9%	5.3	9%	-7.5%	18.0	9%	20.9	9%	-13.9%
North America	5.0	10%	5.4	9%	-8.3%	19.2	9%	20.6	9%	-6.9%
- Scheduled	4.8	9%	5.3	9%	-8.0%	18.8	9%	20.0	9%	-6.2%
- Charter	0.1	0.2%	0.1	0.2%	-18.9%	0.4	0.2%	0.6	0.3%	-29.5%
Rest of World	6.9	13%	7.1	12%	-2.4%	30.2	14%	29.5	13%	2.3%
- Scheduled	6.0	12%	6.2	11%	-1.9%	26.5	13%	25.3	11%	4.6%
- Charter	0.9	2%	0.9	2%	-5.8%	3.7	2%	4.2	2%	-11.5%
Total	51.8	100%	57.0	100%	-9.1%	210.5	100%	222.9	100%	-5.6%
- Scheduled	45.8	88%	50.6	89%	-9.3%	188.0	89%	196.9	88%	-4.5%
- Charter	6.0	12%	6.5	11%	-7.4%	22.5	11%	26.0	12%	-13.7%

Source: CAA Airport Statistics

Passenger numbers to Europe and North America fell by similar amounts, 8.4% and 8.3%, respectively, in quarter 2 2010 compared to quarter 2 2009. Passengers travelling to and from 'Rest of World' destinations (which made up 13% of total passengers) fell by 2.4% and passengers to the UK (domestic) fell by 16.4%.



5. Air cargo tonnes carried to and from UK airports^{5,7,10}

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2010		Q2 2009		+/- %	Q3 09 – Q2 10		Q3 08 – Q2 09		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
Cargo on cargo only flights	194	32%	199	38%	-3.0%	822	34%	834	37%	-1.4%
London	80	13%	78	15%	2.4%	325	13%	329	14%	-1.2%
Regional	114	19%	121	23%	-6.4%	496	20%	504	22%	-1.6%
Bellyhold cargo	417	68%	329	62%	26.6%	1,602	66%	1,445	63%	10.8%
London	392	64%	311	59%	25.9%	1,508	62%	1,363	60%	10.6%
Regional	25	4%	18	3%	39.4%	93	4%	82	4%	13.8%
Total cargo	611	100%	529	100%	15.5%	2,423	100%	2,279	100%	6.3%
London	472	77%	389	74%	21.2%	1,834	76%	1,693	74%	8.3%
Regional	139	23%	140	26%	-0.5%	590	24%	586	26%	0.6%

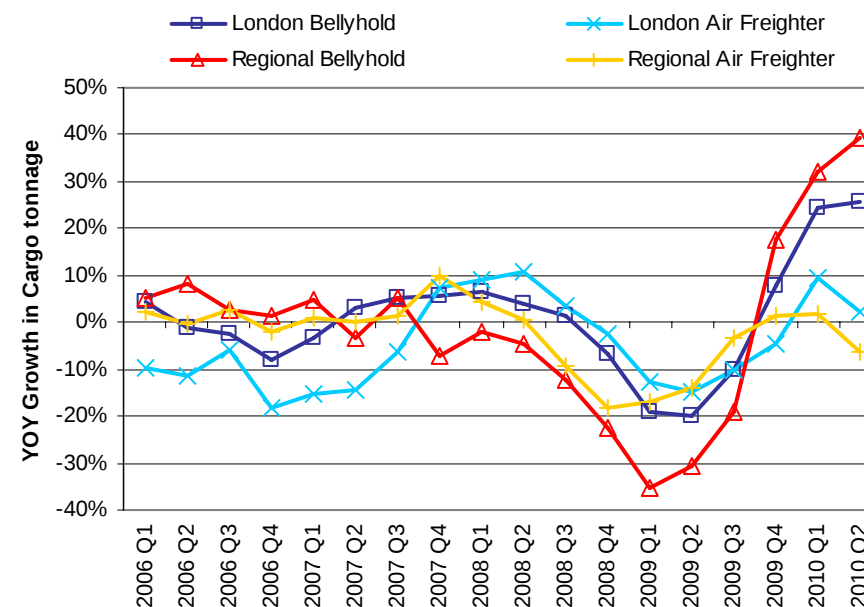
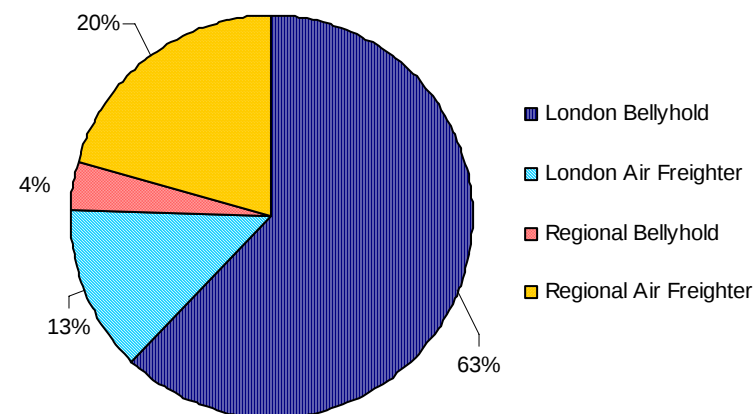
Source: CAA Airport Statistics

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 cargo tonnage at UK airports increased by 15.5% in quarter 2 2010, entirely due to growth at the London airports.

Bellyhold cargo tonnage increased by 26.6% in quarter 2 2010 compared to quarter 2 2009. Over the same period, air freighter tonnage declined by 3%.

Cargo Share (year to date)



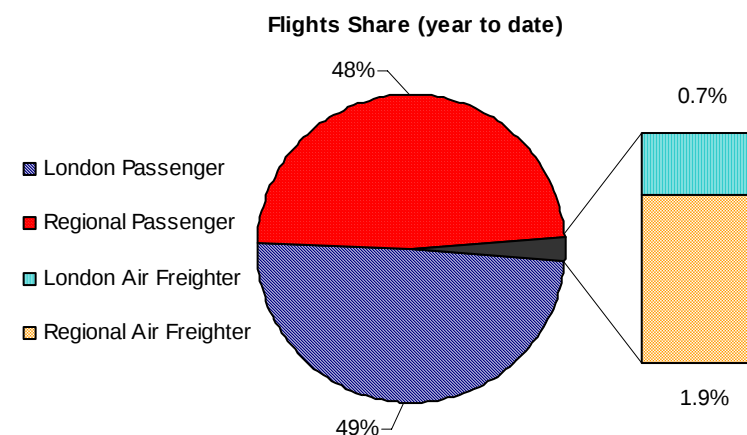
6. All commercial flights to and from UK airports^{5,7,10,11}

Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2010		Q2 2009		+/- %	Q3 09 – Q2 10		Q3 08 – Q2 09		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
Air freighter	12	2%	13	2%	-12.2%	51	3%	56	3%	-9.0%
London	3	1%	4	1%	-7.6%	14	1%	15	1%	-9.1%
Regional	8	2%	9	2%	-14.0%	37	2%	40	2%	-9.0%
Passenger flights	462	98%	516	98%	-10.4%	1,885	97%	2,056	97%	-8.3%
London	229	48%	255	48%	-10.2%	952	49%	1,019	48%	-6.6%
Regional	233	49%	261	49%	-10.6%	933	48%	1,037	49%	-10.0%
Total flights	474	100%	529	100%	-10.4%	1,936	100%	2,111	100%	-8.3%
London	233	49%	259	49%	-10.1%	966	50%	1,034	49%	-6.6%
Regional	241	51%	270	51%	-10.7%	970	50%	1,077	51%	-9.9%

Source: CAA Airport Statistics

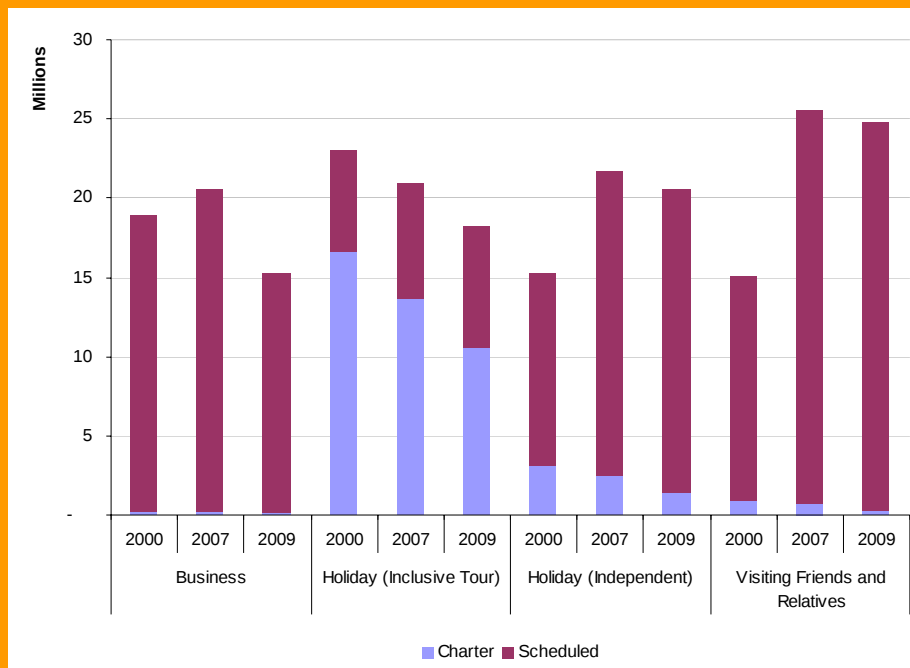
The number of commercial flights at reporting UK airports is a measure of commercial aviation activity in the UK. It includes both passenger and cargo flights, but excludes military flights, general aviation and aircraft that pass through UK airspace without landing.

Total commercial flights in the UK decreased by 10.4% in quarter 2 2010 compared to quarter 2 2009. The decline in air freighter flights (12.2%) was greater to that of passenger flights (10.4%).



Did you know? UK resident passengers by journey purpose and type of flight

UK resident passengers by journey purpose and type of flight



Source: CAA Passenger Survey

Note: Airports included are Heathrow, Gatwick, Luton, Stansted and Manchester (the 5 airports with most passengers during 2009).

This chart shows the journey purpose of UK resident passengers carried on scheduled and charter flights to and from the five UK airports continuously surveyed by the CAA (Heathrow, Gatwick, Luton, Stansted and Manchester) in 2000, 2007 (just before the recession) and 2009.

In the last decade, the fastest demand growth was seen in the Visiting Friends and Relatives* segment. Holiday traffic grew more modestly and in 2009 the number of UK resident holiday passengers was almost the same as in 2000 (about 38.5m).

Within the Holiday segment, passengers travelling on inclusive tours (where the air ticket was bought in conjunction with other elements of the trip) saw the biggest reductions in traffic. This was primarily driven by the reduction in Charter services, although inclusive tours booked on scheduled airlines increased from 6.4m in 2000 to 7.6m in 2009.

There appears to have been a switch away from inclusive tours, as passengers have become more willing to assemble their holidays over the Internet.

Finally, UK resident business passengers increased from 18.9m, in 2000, to 20.5m, in 2007. However, UK resident business passenger numbers seem to have been significantly affected by the recent recession: only 15.2m UK resident business passengers used the five busiest airports in 2009.

* see "[International Relations: the growth in air travel to visit friends or relatives](#)" for more on this subject.

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.
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.