

# Aviation Trends

## Quarter 2 2011



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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 number of terminal passengers at UK airports changed during economic recessions.

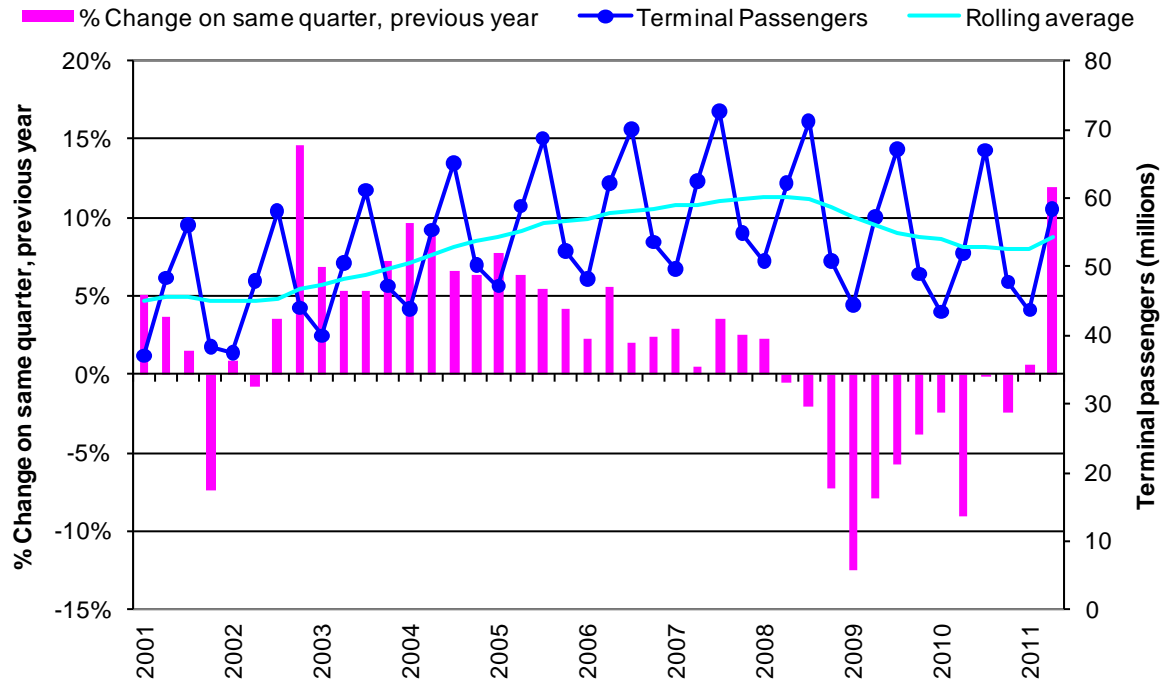
In this edition of aviation trends, we show a strong recovery in the number of passengers and commercial flights handled at UK airports in quarter 2 2011, as air traffic in quarter 2 2010 was affected by volcanic ash disruptions.

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.

For a list of all statistics available on the CAA website, see [www.caa.co.uk/statistics](http://www.caa.co.uk/statistics).

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).

Quarter 2 2011 saw a strong recovery of passenger numbers (12%) compared with the same quarter last year. This was mainly due to the volcanic eruption and subsequent closure of UK airspace, and airline industrial action in quarter 2 2010.

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

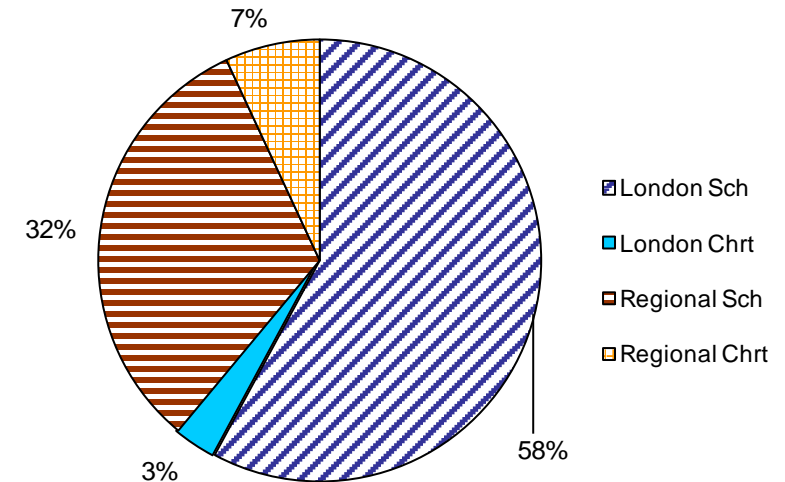
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2011		Q2 2010		+/- %	Q3 10 – Q2 11		Q3 09 – Q2 10		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
<b>London Airports</b>	<b>35.0</b>	<b>60%</b>	<b>30.8</b>	<b>59%</b>	<b>13.5%</b>	<b>131.8</b>	<b>61%</b>	<b>127.3</b>	<b>60%</b>	<b>3.5%</b>
- Scheduled	33.2	57%	29.0	56%	14.4%	125.0	58%	120.2	57%	4.0%
- Charter	1.8	3%	1.8	3%	-0.1%	6.8	3%	7.1	3%	-4.0%
<b>Regional Airports</b>	<b>23.1</b>	<b>40%</b>	<b>21.1</b>	<b>41%</b>	<b>9.7%</b>	<b>84.2</b>	<b>39%</b>	<b>83.5</b>	<b>40%</b>	<b>0.9%</b>
- Scheduled	19.0	33%	16.9	33%	12.3%	69.3	32%	68.1	32%	1.7%
- Charter	4.2	7%	4.2	8%	-0.9%	14.9	7%	15.4	7%	-2.6%
<b>All Airports</b>	<b>58.1</b>	<b>100%</b>	<b>51.9</b>	<b>100%</b>	<b>12.0%</b>	<b>216.0</b>	<b>100%</b>	<b>210.8</b>	<b>100%</b>	<b>2.5%</b>
- Scheduled	52.2	90%	45.9	88%	13.6%	194.3	90%	188.3	89%	3.1%
- Charter	5.9	10%	6.0	12%	-0.6%	21.8	10%	22.4	11%	-3.1%

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

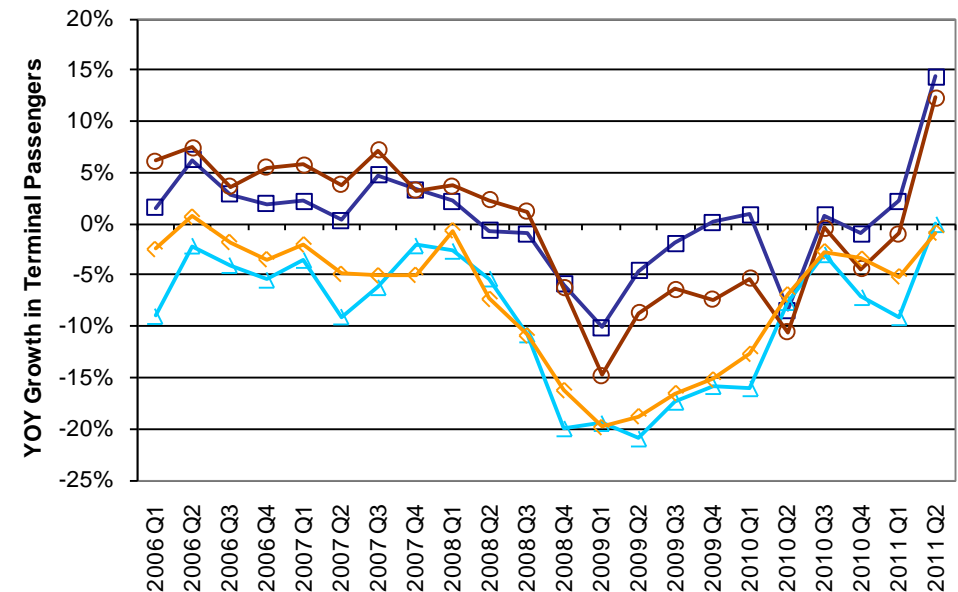
UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in the table and graph on this page therefore exclude transit passengers – those who remain aboard aircraft which land at a UK airport and then depart for another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

Compared to the previous year, quarter 2 2011 saw an increase of 13.6% in scheduled passengers at all airports, and a decline in charter passengers of 0.6%. The number of scheduled passengers at regional airports increased by 12.3%, whereas London airports saw a 14.4% rise. The number of charter passengers fell at both London airports (0.1%) and regional airports (0.9%).

Passenger Share (year to date)



Legend for YOY Growth in Terminal Passengers: London Sch (blue square), London Chrt (cyan triangle), Regional Sch (orange circle), Regional Chrt (yellow diamond)



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

Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2011		Q2 2010		+/- %	Q3 10 – Q2 11		Q3 09 – Q2 10		+/- %
	Flights	% of total	Flights	% of total		Flights	% of total	Flights	% of total	
<b>London Airports</b>	<b>252.7</b>	<b>50%</b>	<b>230.0</b>	<b>50%</b>	<b>9.9%</b>	<b>969.8</b>	<b>51%</b>	<b>953.7</b>	<b>51%</b>	<b>1.7%</b>
- Scheduled	242.9	49%	220.5	48%	10.2%	933.1	49%	915.6	48%	1.9%
- Charter	9.8	2%	9.5	2%	3.3%	36.8	2%	38.1	2%	-3.5%
<b>Regional Airports</b>	<b>247.8</b>	<b>50%</b>	<b>233.3</b>	<b>50%</b>	<b>6.2%</b>	<b>931.6</b>	<b>49%</b>	<b>934.3</b>	<b>49%</b>	<b>-0.3%</b>
- Scheduled	224.1	45%	209.5	45%	7.0%	846.3	45%	846.7	45%	0.0%
- Charter	23.6	5%	23.8	5%	-0.7%	85.4	4%	87.7	5%	-2.6%
<b>All Airports</b>	<b>500.5</b>	<b>100%</b>	<b>463.3</b>	<b>100%</b>	<b>8.0%</b>	<b>1,901.5</b>	<b>100%</b>	<b>1,888.0</b>	<b>100%</b>	<b>0.7%</b>
- Scheduled	467.1	93%	430.0	93%	8.6%	1,779.4	94%	1,762.3	93%	1.0%
- Charter	33.4	7%	33.3	7%	0.4%	122.1	6%	125.8	7%	-2.9%

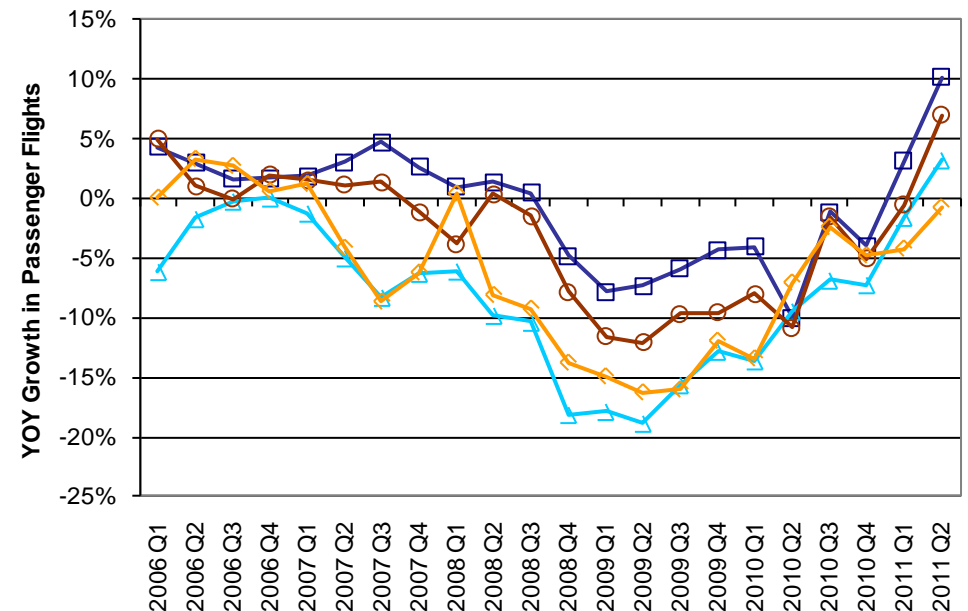
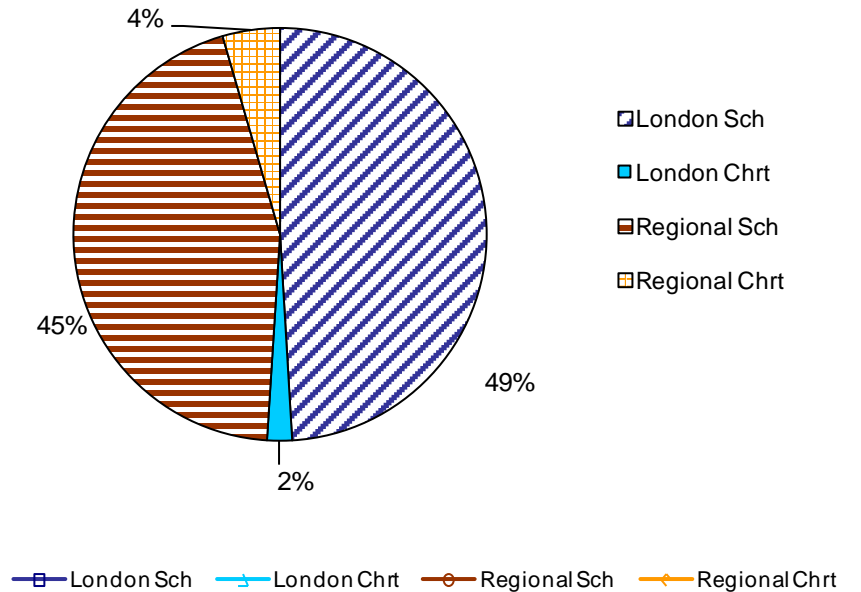
Source: CAA Airport Statistics

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

In quarter 2 2011, the number of passenger flights to and from UK airports rose by about 37,200 compared to quarter 2 2010, representing an 8.0% increase. Rolling year flights increased by 0.7% (around 13,400 flights).

In quarter 2 2011, there were 9.9% more flights at London airports and 6.2% more flights at regional airports than in the same quarter in 2010. On a rolling year basis, flights at London airports grew by 1.7% and at regional airports fell by 0.3%. Across all UK airports, scheduled and charter flights increased by 8.6% and 0.4% respectively in quarter 2 2011.

Flight Share (year to date)

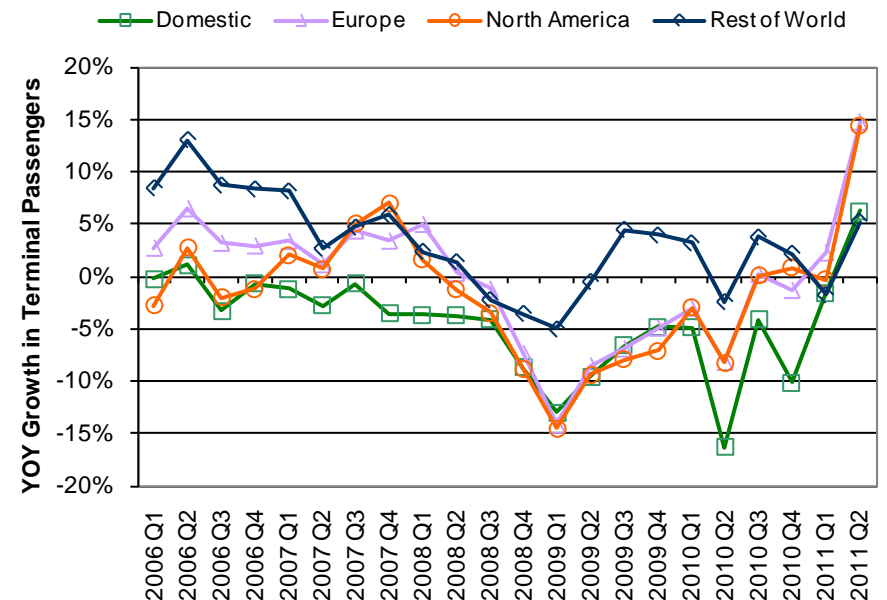
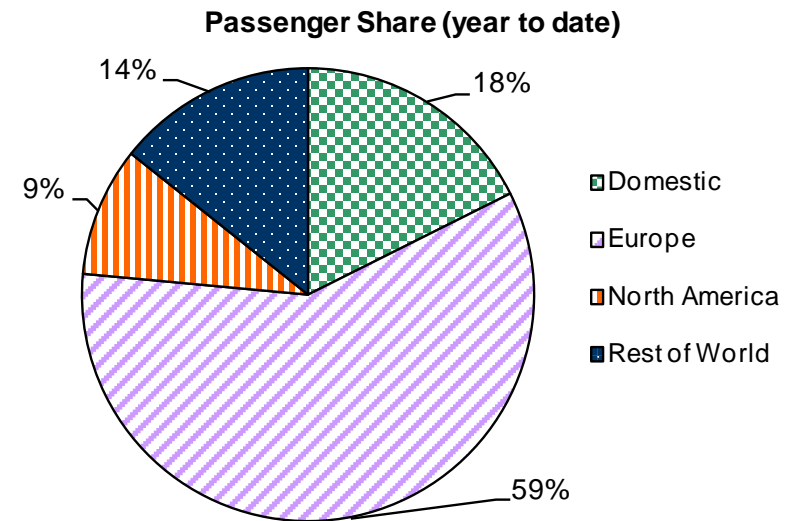


#### 4. Terminal passengers at UK airports by origin / destination<sup>6,7,8,9,11</sup>

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2011		Q2 2010		+/- %	Q3 10 – Q2 11		Q3 09 – Q2 10		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>Domestic</b>	<b>9.5</b>	<b>16%</b>	<b>9.0</b>	<b>17%</b>	<b>6.3%</b>	<b>38.1</b>	<b>18%</b>	<b>39.2</b>	<b>19%</b>	<b>-2.7%</b>
- Scheduled	9.4	16%	8.9	17%	6.2%	37.7	17%	38.8	18%	-2.8%
- Charter	0.1	0.2%	0.1	0.2%	8.3%	0.4	0.2%	0.3	0.2%	6.5%
<b>Europe</b>	<b>35.6</b>	<b>61%</b>	<b>31.0</b>	<b>60%</b>	<b>14.7%</b>	<b>127.1</b>	<b>59%</b>	<b>122.2</b>	<b>58%</b>	<b>4.0%</b>
- Scheduled	30.6	53%	26.2	50%	17.0%	109.5	51%	104.2	49%	5.1%
- Charter	5.0	9%	4.9	9%	2.9%	17.6	8%	18.0	9%	-2.3%
<b>North America</b>	<b>5.7</b>	<b>10%</b>	<b>5.0</b>	<b>10%</b>	<b>14.4%</b>	<b>19.9</b>	<b>9%</b>	<b>19.2</b>	<b>9%</b>	<b>3.9%</b>
- Scheduled	5.5	10%	4.8	9%	14.2%	19.5	9%	18.8	9%	4.0%
- Charter	0.1	0.2%	0.1	0.2%	19.8%	0.4	0.2%	0.4	0.2%	-2.5%
<b>Rest of World</b>	<b>7.3</b>	<b>13%</b>	<b>6.9</b>	<b>13%</b>	<b>5.2%</b>	<b>30.9</b>	<b>14%</b>	<b>30.2</b>	<b>14%</b>	<b>2.3%</b>
- Scheduled	6.6	11%	6.0	12%	9.5%	27.5	13%	26.5	13%	3.7%
- Charter	0.7	1%	0.9	2%	-23.5%	3.4	2%	3.7	2%	-7.9%
<b>Total</b>	<b>58.1</b>	<b>100%</b>	<b>51.9</b>	<b>100%</b>	<b>12.0%</b>	<b>216.0</b>	<b>100%</b>	<b>210.8</b>	<b>100%</b>	<b>2.5%</b>
- Scheduled	52.2	90%	45.9	88%	13.6%	194.3	90%	188.3	89%	3.1%
- Charter	5.9	10%	6.0	12%	-0.6%	21.8	10%	22.4	11%	-3.1%

Source: CAA Airport Statistics

In quarter 2 2011, the number of passengers on board domestic flights rose by 6.3% compared with the same quarter last year. There were 14.4% and 5.2% more passengers travelling to and from North America and 'Rest of the world' respectively. Travel to and from Europe (which made up 61% of total passengers) showed a 14.7% increase, and total passenger numbers increased by 12.0% compared to quarter 2 2010.



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

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2011		Q2 2010		+/- %	Q3 10 – Q2 11		Q3 09 – Q2 10		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
<b>Cargo on cargo only flights</b>	<b>203.3</b>	<b>32%</b>	<b>198.8</b>	<b>32%</b>	<b>2.3%</b>	<b>845.1</b>	<b>33%</b>	<b>826.7</b>	<b>34%</b>	<b>2.2%</b>
London	81.9	13%	79.9	13%	2.5%	334.5	13%	325.4	13%	2.8%
Regional	121.4	19%	118.8	19%	2.1%	510.6	20%	501.3	21%	1.8%
<b>Bellyhold cargo</b>	<b>425.9</b>	<b>68%</b>	<b>417.0</b>	<b>68%</b>	<b>2.1%</b>	<b>1,706.7</b>	<b>67%</b>	<b>1,603.4</b>	<b>66%</b>	<b>6.4%</b>
London	401.3	64%	391.7	64%	2.4%	1,607.1	63%	1,508.4	62%	6.5%
Regional	24.6	4%	25.3	4%	-2.6%	99.5	4%	95.0	4%	4.8%
<b>Total cargo</b>	<b>629.3</b>	<b>100%</b>	<b>615.8</b>	<b>100%</b>	<b>2.2%</b>	<b>2,551.7</b>	<b>100%</b>	<b>2,430.1</b>	<b>100%</b>	<b>5.0%</b>
London	483.2	77%	471.6	77%	2.5%	1,941.7	76%	1,833.8	75%	5.9%
Regional	146.0	23%	144.1	23%	1.3%	610.1	24%	596.3	25%	2.3%

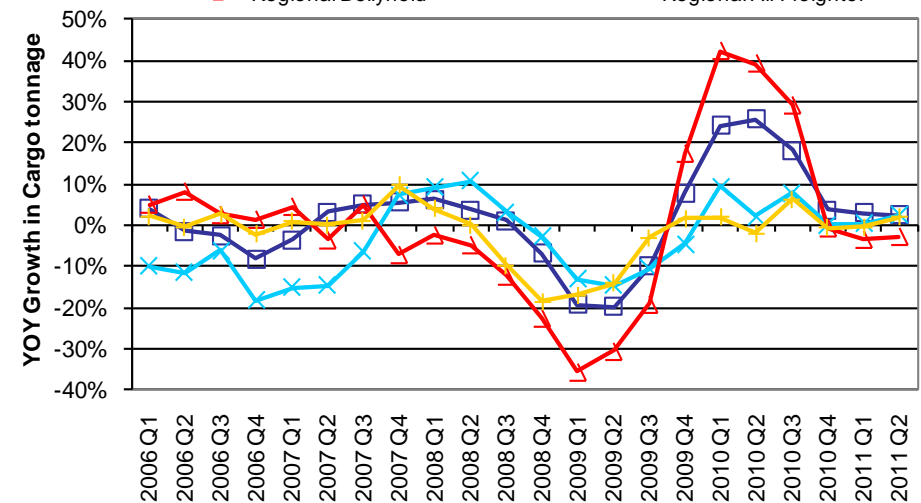
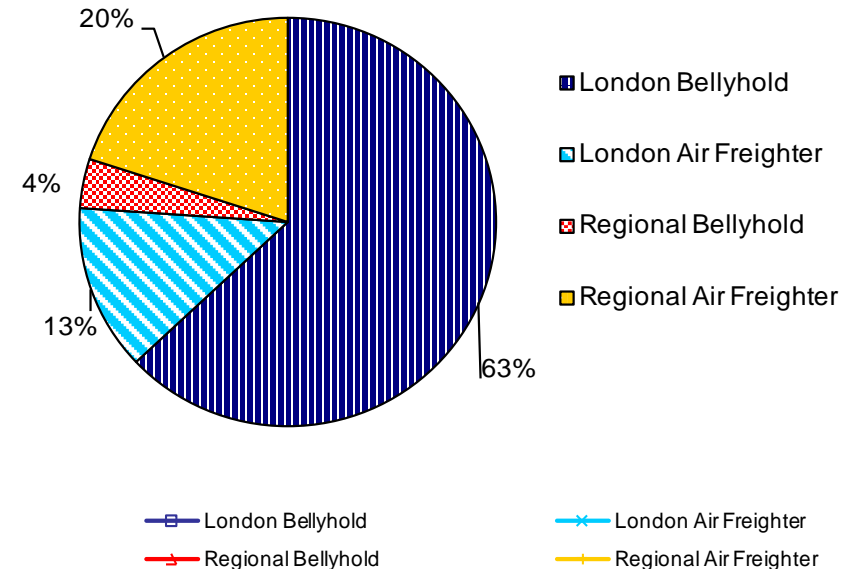
Source: CAA Airport Statistics

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 all UK airports rose by 2.2% in quarter 2 2011. London airports saw a bigger increase (2.5%) compared to regional airports (1.1%). On a rolling year basis, overall cargo tonnage was up 5.0% compared to the previous year.

Air freighter cargo tonnage saw a rise of 2.3% compared with the same quarter last year. Over the same period, bellyhold tonnage increased by 2.1%.

Cargo Share (year to date)



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

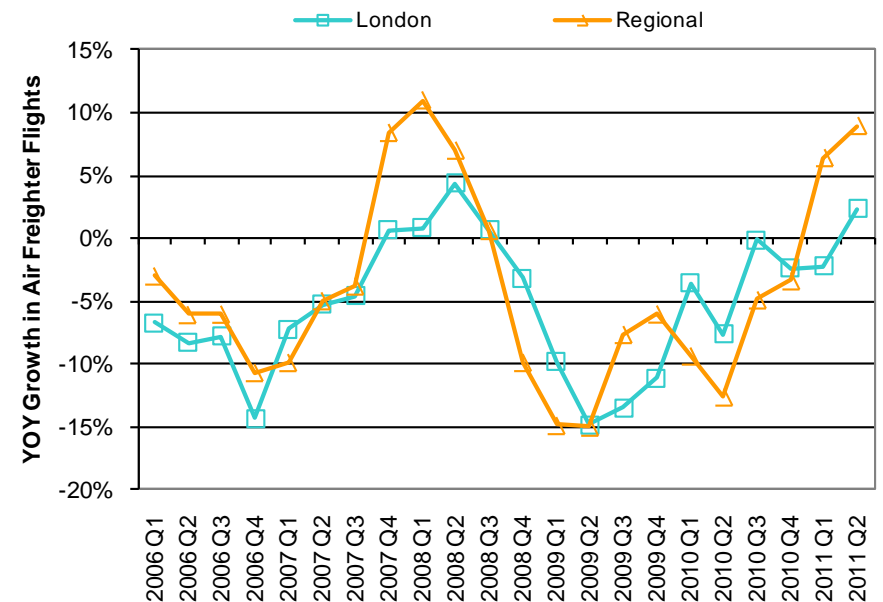
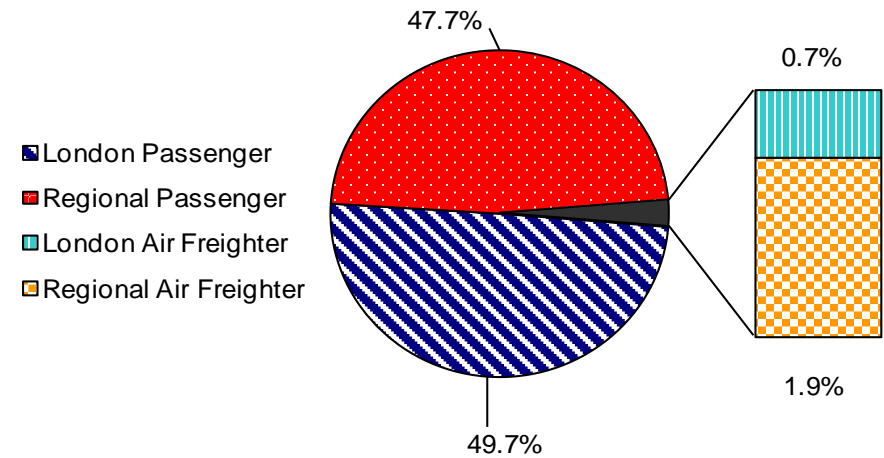
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2011		Q2 2010		+/- %	Q3 10 – Q2 11		Q3 09 – Q2 10		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>Air freighter</b>	<b>12.4</b>	<b>2%</b>	<b>11.6</b>	<b>2%</b>	<b>7.1%</b>	<b>50.9</b>	<b>3%</b>	<b>50.4</b>	<b>3%</b>	<b>0.8%</b>
London	3.5	1%	3.4	1%	2.3%	13.9	1%	14.0	1%	-0.6%
Regional	9.0	2%	8.2	2%	9.0%	36.9	2%	36.5	2%	1.3%
<b>Passenger flights</b>	<b>500.5</b>	<b>98%</b>	<b>463.3</b>	<b>98%</b>	<b>8.0%</b>	<b>1,901.5</b>	<b>97%</b>	<b>1,888.0</b>	<b>97%</b>	<b>0.7%</b>
London	252.7	49%	230.0	48%	9.9%	969.8	50%	953.7	49%	1.7%
Regional	247.8	48%	233.3	49%	6.2%	931.6	48%	934.3	48%	-0.3%
<b>Total flights</b>	<b>512.9</b>	<b>100%</b>	<b>474.9</b>	<b>100%</b>	<b>8.0%</b>	<b>1,952.3</b>	<b>100%</b>	<b>1,938.5</b>	<b>100%</b>	<b>0.7%</b>
London	256.2	50%	233.3	49%	9.8%	983.7	50%	967.7	50%	1.7%
Regional	256.8	50%	241.6	51%	6.3%	968.6	50%	970.8	50%	-0.2%

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 by 8.0% in quarter 2 2011 compared to quarter 1 2010. The number of passenger flights saw a marginally bigger increase (8.0%) than that of air freighter flights (7.1%).

Flights Share (year to date)

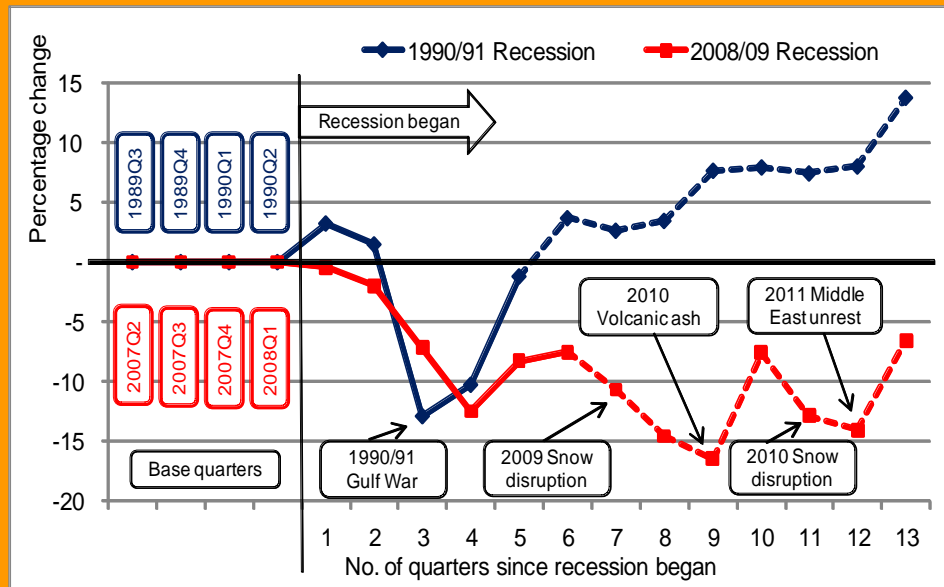




## Did you know? Recession and number of passengers at UK airports

Recessions, defined as a decline in real GDP for two or more consecutive quarters, are typically accompanied by a slowdown in business activities and a rise in unemployment. The two most recent recessions in the UK happened during 1990 Q3 – 1991 Q3 (lasting for 5 quarters) and 2008 Q2 – 2009 Q3 (lasting for 6 quarters).

### Change in number of passengers in UK airports over 13 quarters since recession began



Source: CAA Airport Statistics

Historically, air traffic demand is positively related to economic performance. When the economy is in recession, the decline in business turnover and household income have negative impacts on business and leisure demands for air travel.

This graph shows the change in passenger numbers at UK airports during the 1990/91 and 2008/09 recessions. The change in passenger numbers is relative to the corresponding quarters just before the recession. For example, the number of passengers in 1991 Q3 (the 5<sup>th</sup> period after the start of the 1990/91 recession) is compared to that in 1989 Q3 (the last third quarter before the start of the recession). Solid lines denote the quarters in which the UK was in recession, and dotted lines represent post-recession periods.

In the first two quarters of the 1990/91 recession, the number of passengers was actually higher than that in the corresponding quarters a year before. Traffic fell in the same quarter as the 1990/91 Gulf War began, and recovered as soon as the economy started to recover.

Throughout the 2008/09 recession, the number of passengers at UK airports dropped, and then declined further after the recession ended in 2009 Q4. This was partly driven by non-economic events such as weather disruptions, strikes and political unrest. Nevertheless, the sharp decline in GDP during the recession and the subsequent weak recovery were significant contributory factors. The subdued demand for air travel was also likely caused by ongoing economic uncertainty in the EU and USA (destinations which had a combined market share of 59% of passengers at UK airports in 2010).

## 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.