

# Aviation Trends

## Quarter 3 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 the development of air passenger traffic in London from 1990 to 2010.

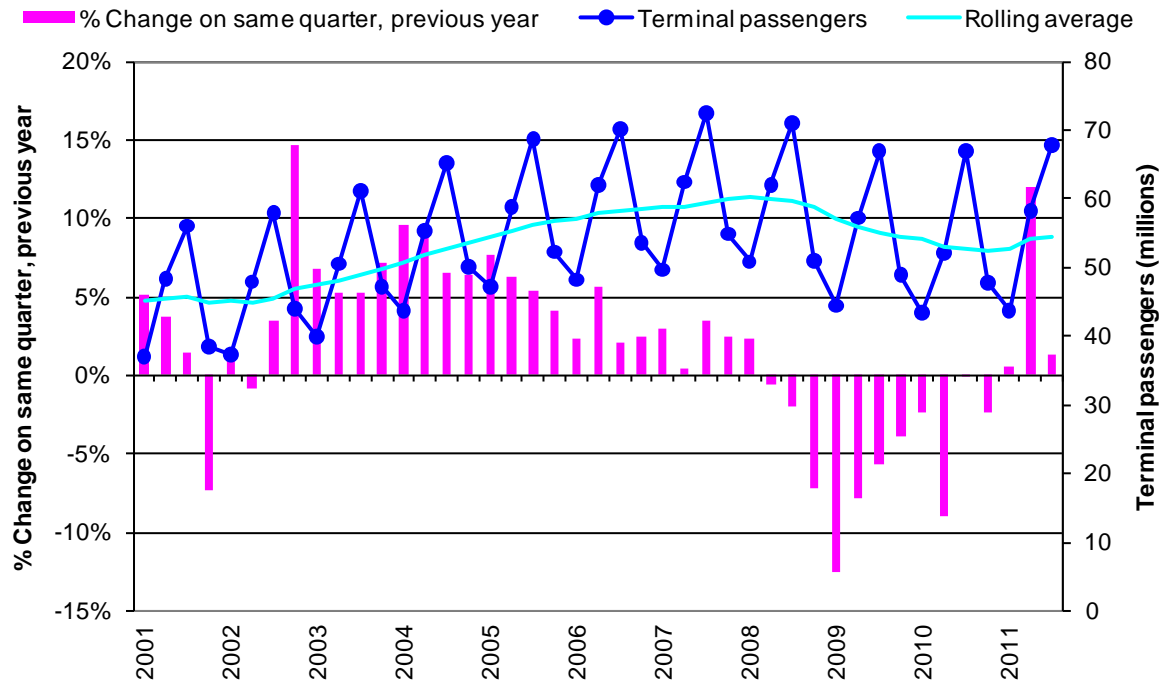
In this edition of aviation trends, we show a mild recovery in the number of passengers and a small decline in the number of commercial flights handled at UK airports in quarter 3 2011.

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. Due to rounding of figures, there may be an apparent slight discrepancy between the sum of the constituent items and the total as shown.

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).

There were 67.9 million terminal passengers at UK airports in Quarter 3 2011, which represented a mild recovery of 1.3% compared with the same quarter last year.

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

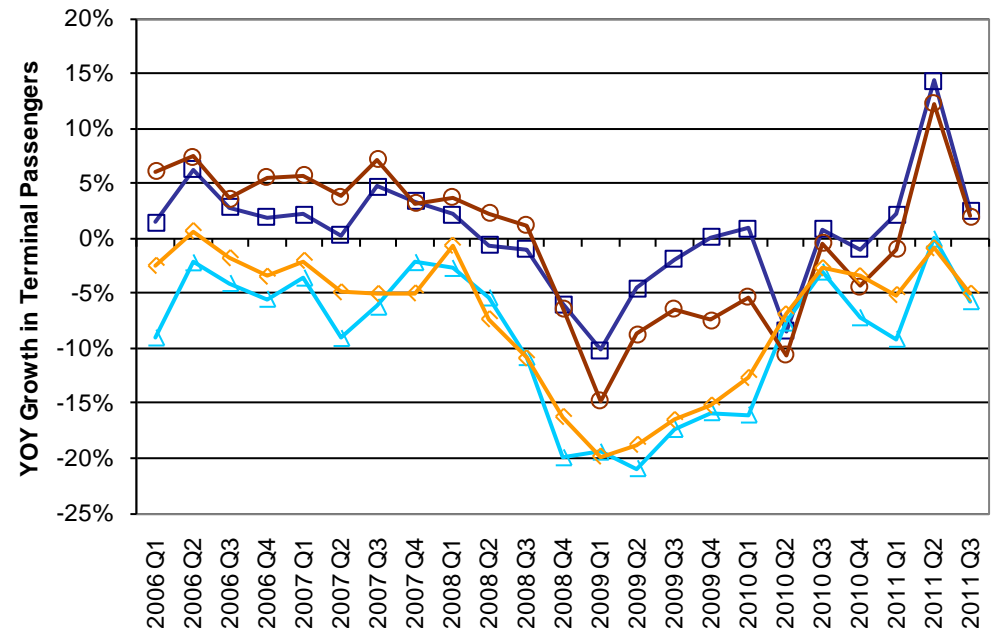
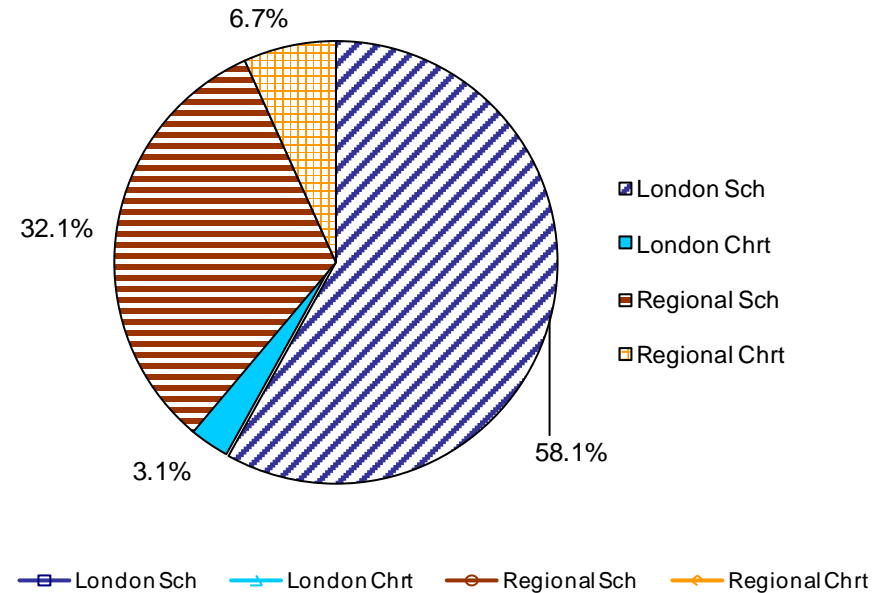
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2011		Q3 2010		+/- %	Q4 10 - Q3 11		Q4 09 - Q3 10		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
<b>London Airports</b>	<b>40.0</b>	<b>59%</b>	<b>39.2</b>	<b>59%</b>	<b>1.9%</b>	<b>132.6</b>	<b>61%</b>	<b>127.5</b>	<b>61%</b>	<b>3.9%</b>
- Scheduled	37.3	55%	36.4	54%	2.5%	125.9	58%	120.5	57%	4.5%
- Charter	2.7	4%	2.9	4%	-5.7%	6.7	3%	7.0	3%	-5.1%
<b>Regional Airports</b>	<b>27.7</b>	<b>41%</b>	<b>27.6</b>	<b>41%</b>	<b>0.4%</b>	<b>84.3</b>	<b>39%</b>	<b>83.2</b>	<b>39%</b>	<b>1.4%</b>
- Scheduled	21.7	32%	21.3	32%	2.1%	69.7	32%	68.0	32%	2.5%
- Charter	6.0	9%	6.3	9%	-5.0%	14.6	7%	15.2	7%	-3.6%
<b>All Airports</b>	<b>67.7</b>	<b>100%</b>	<b>66.8</b>	<b>100%</b>	<b>1.3%</b>	<b>216.9</b>	<b>100%</b>	<b>210.7</b>	<b>100%</b>	<b>2.9%</b>
- Scheduled	59.0	87%	57.6	86%	2.4%	195.6	90%	188.5	89%	3.7%
- Charter	8.7	13%	9.2	14%	-5.2%	21.3	10%	22.2	11%	-4.1%

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, in quarter 3 2011, there were 2.4% more scheduled passengers but 5.2% less charter passengers at all airports. The number of scheduled passengers at regional airports increased by 2.1%, whereas London airports saw a 2.5% rise. The number of charter passengers fell at both London airports (5.7%) and regional airports (5.0%).

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				
	Q3 2011		Q3 2010		+/- %	Q4 10 - Q3 11		Q4 09 - Q3 10		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>London Airports</b>	<b>267.0</b>	<b>50%</b>	<b>266.0</b>	<b>49%</b>	<b>0.4%</b>	<b>970.8</b>	<b>51%</b>	<b>949.8</b>	<b>51%</b>	<b>2.2%</b>
- Scheduled	253.3	47%	251.8	47%	0.6%	934.6	49%	912.8	49%	2.4%
- Charter	13.7	3%	14.2	3%	-3.7%	36.2	2%	37.1	2%	-2.2%
<b>Regional Airports</b>	<b>266.6</b>	<b>50%</b>	<b>273.6</b>	<b>51%</b>	<b>-2.6%</b>	<b>924.6</b>	<b>49%</b>	<b>929.7</b>	<b>49%</b>	<b>-0.6%</b>
- Scheduled	234.8	44%	239.7	44%	-2.1%	841.3	44%	842.9	45%	-0.2%
- Charter	31.8	6%	33.9	6%	-6.2%	83.3	4%	86.8	5%	-4.1%
<b>All Airports</b>	<b>533.5</b>	<b>100%</b>	<b>539.6</b>	<b>100%</b>	<b>-1.1%</b>	<b>1,895.4</b>	<b>100%</b>	<b>1,879.6</b>	<b>100%</b>	<b>0.8%</b>
- Scheduled	488.1	91%	491.5	91%	-0.7%	1,775.9	94%	1,755.7	93%	1.2%
- Charter	45.4	9%	48.1	9%	-5.5%	119.5	6%	123.9	7%	-3.6%

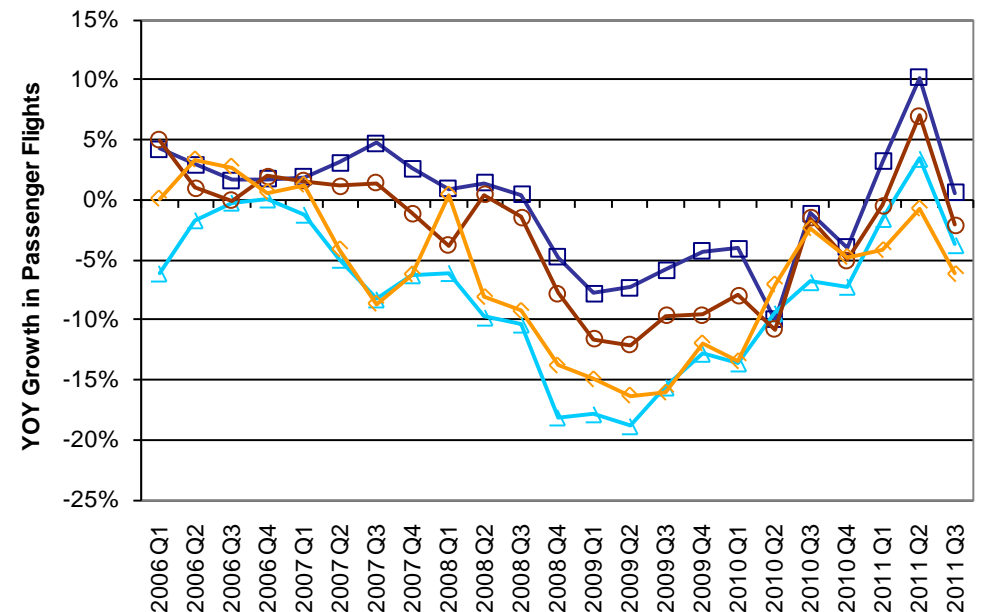
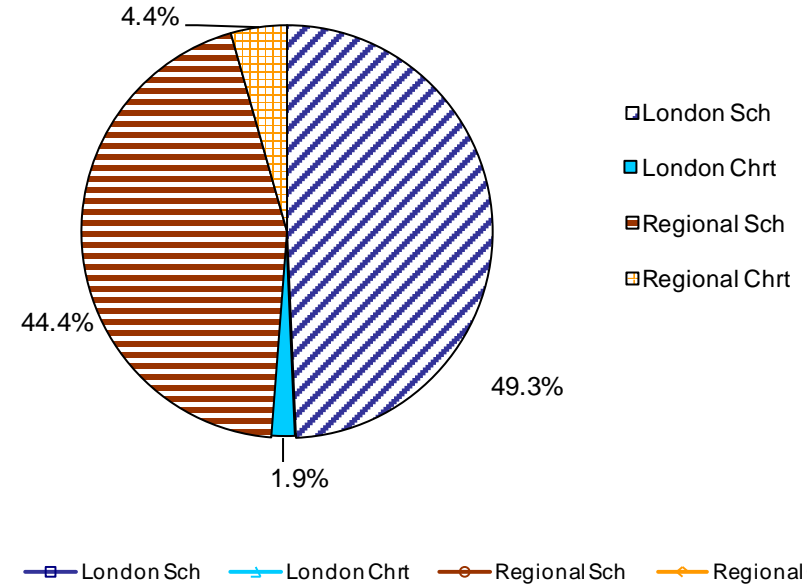
Source: CAA Airport Statistics

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

In quarter 3 2011, the number of passenger flights was down 1.1% across all airports compared with quarter 3 2010. The number of scheduled and charter flights decreased by 0.7% and 5.5% respectively. On a rolling year basis, there were 1.2% more scheduled flights and 3.6% less charter flights.

Compared to the same quarter in 2010, there were 0.4% more flights at London airports and 2.6% less flights at regional airports in quarter 3 2011. On a rolling year basis, the number of flights grew by 2.2% at London airports and fell by 0.6% at regional airports.

Flight Share (year to date)

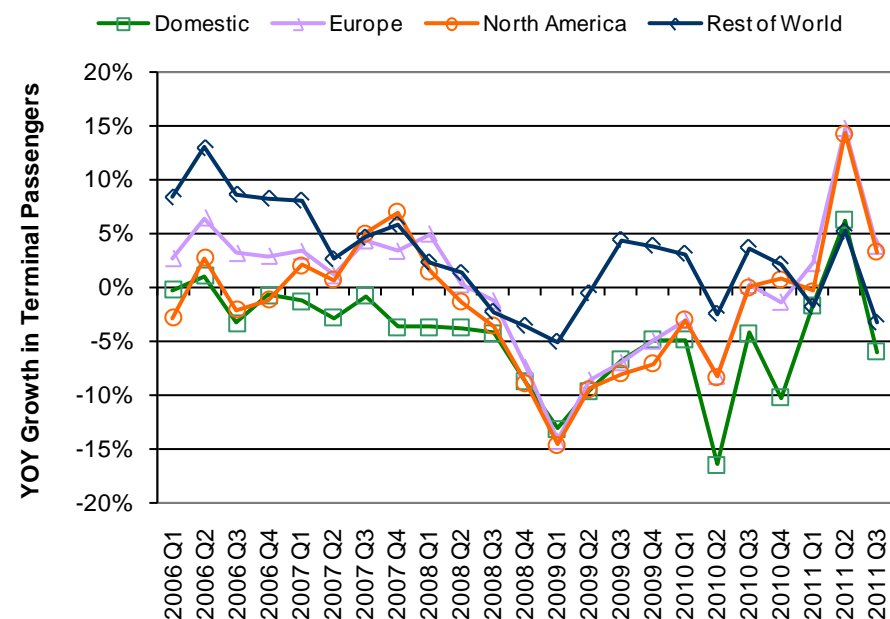
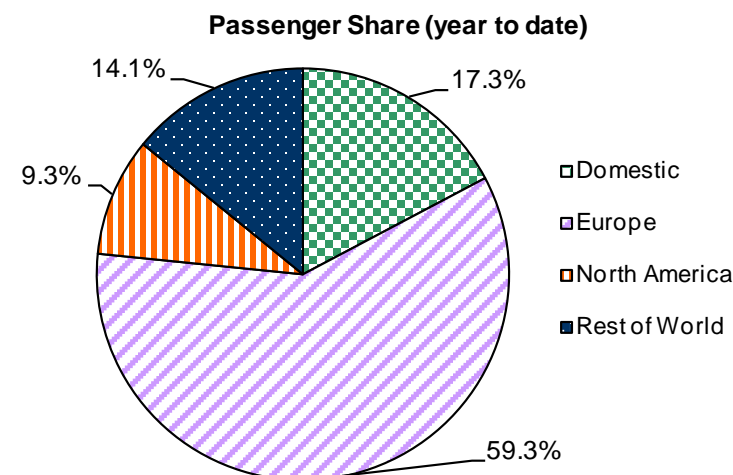


#### 4. Terminal passengers at UK airports by origin / destination<sup>6,7,8,9,11</sup>

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2011		Q3 2010		+/- %	Q4 10 - Q3 11		Q4 09 - Q3 10		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>Domestic</b>	<b>10.3</b>	<b>15%</b>	<b>10.9</b>	<b>16%</b>	<b>-5.9%</b>	<b>37.4</b>	<b>17%</b>	<b>38.7</b>	<b>18%</b>	<b>-3.2%</b>
- Scheduled	10.2	15%	10.8	16%	-6.0%	37.1	17%	38.3	18%	-3.3%
- Charter	0.1	0.1%	0.1	0.1%	2.2%	0.4	0.2%	0.3	0.2%	4.8%
<b>Europe</b>	<b>43.0</b>	<b>64%</b>	<b>41.4</b>	<b>62%</b>	<b>3.9%</b>	<b>128.7</b>	<b>59%</b>	<b>122.4</b>	<b>58%</b>	<b>5.2%</b>
- Scheduled	35.4	52%	33.5	50%	5.5%	111.3	51%	104.6	50%	6.4%
- Charter	7.6	11%	7.9	12%	-2.9%	17.4	8%	17.8	8%	-2.1%
<b>North America</b>	<b>6.2</b>	<b>9%</b>	<b>6.0</b>	<b>9%</b>	<b>3.3%</b>	<b>20.1</b>	<b>9%</b>	<b>19.2</b>	<b>9%</b>	<b>4.9%</b>
- Scheduled	6.0	9%	5.9	9%	2.8%	19.7	9%	18.8	9%	4.8%
- Charter	0.2	0.3%	0.2	0.3%	18.5%	0.4	0.2%	0.4	0.2%	7.1%
<b>Rest of World</b>	<b>8.1</b>	<b>12%</b>	<b>8.4</b>	<b>13%</b>	<b>-3.2%</b>	<b>30.6</b>	<b>14%</b>	<b>30.5</b>	<b>14%</b>	<b>0.4%</b>
- Scheduled	7.4	11%	7.4	11%	0.2%	27.5	13%	26.8	13%	2.6%
- Charter	0.7	1%	1.0	1%	-28.9%	3.1	1%	3.7	2%	-15.8%
<b>Total</b>	<b>67.7</b>	<b>100%</b>	<b>66.8</b>	<b>100%</b>	<b>1.3%</b>	<b>216.9</b>	<b>100%</b>	<b>210.7</b>	<b>100%</b>	<b>2.9%</b>
- Scheduled	59.0	87%	57.6	86%	2.4%	195.6	90%	188.5	89%	3.7%
- Charter	8.7	13%	9.2	14%	-5.2%	21.3	10%	22.2	11%	-4.1%

Source: CAA Airport Statistics

In quarter 3 2011, the number of passengers on board domestic flights fell by 5.9% compared with the same quarter last year. There were 3.3% and 3.9% more passengers travelling to and from North America and European destinations respectively. Travel to and from 'Rest of the World' showed a 3.2% decrease, and total passenger numbers increased by 1.3% compared to quarter 3 2010.



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

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2011		Q3 2010		+/- %	Q4 10 - Q3 11		Q4 09 - Q3 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>203.1</b>	<b>33%</b>	<b>218.1</b>	<b>33%</b>	<b>-6.9%</b>	<b>830.6</b>	<b>33%</b>	<b>841.5</b>	<b>33%</b>	<b>-1.3%</b>
London	82.4	13%	85.9	13%	-4.0%	331.0	13%	331.8	13%	-0.2%
Regional	120.7	19%	132.2	20%	-8.7%	499.6	20%	509.7	20%	-2.0%
<b>Bellyhold cargo</b>	<b>419.2</b>	<b>67%</b>	<b>435.8</b>	<b>67%</b>	<b>-3.8%</b>	<b>1,690.0</b>	<b>67%</b>	<b>1,672.9</b>	<b>67%</b>	<b>1.0%</b>
London	392.7	63%	408.9	63%	-4.0%	1,590.9	63%	1,571.8	63%	1.2%
Regional	26.5	4%	27.0	4%	-1.6%	99.1	4%	101.1	4%	-2.0%
<b>Total cargo</b>	<b>622.3</b>	<b>100%</b>	<b>653.9</b>	<b>100%</b>	<b>-4.8%</b>	<b>2,520.6</b>	<b>100%</b>	<b>2,514.4</b>	<b>100%</b>	<b>0.2%</b>
London	475.1	76%	494.8	76%	-4.0%	1,922.0	76%	1,903.6	76%	1.0%
Regional	147.2	24%	159.2	24%	-7.5%	598.6	24%	610.8	24%	-2.0%

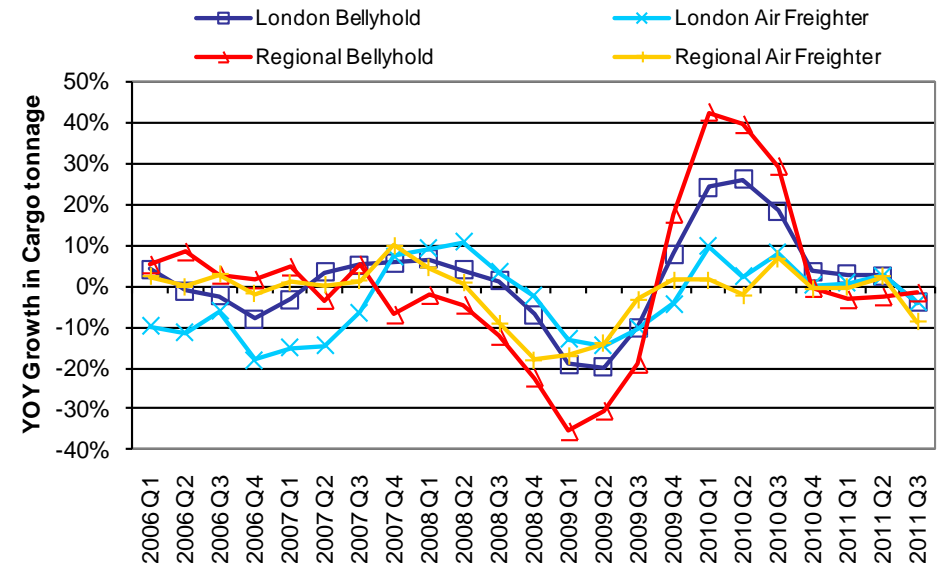
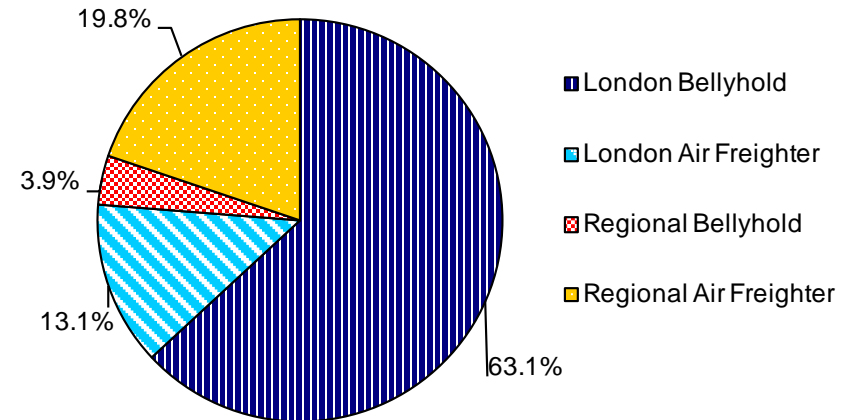
Source: CAA Airport Statistics

Air cargo – freight and mail – is transported in and out of the UK on air freighters and in the bellyholds of passenger aircraft.

In quarter 3 2011, the quarterly year-on-year cargo tonnage at all UK airports was down 4.8% compared with quarter 3 2010. London airports saw a smaller decrease (4.0%) compared to regional airports (7.5%). On a rolling year basis, overall cargo tonnage was up 0.2% compared to the previous year.

Air freighter cargo tonnage saw a drop of 6.9% compared with the same quarter last year. Over the same period, bellyhold tonnage decreased by 3.8%.

Cargo Share (year to date)



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

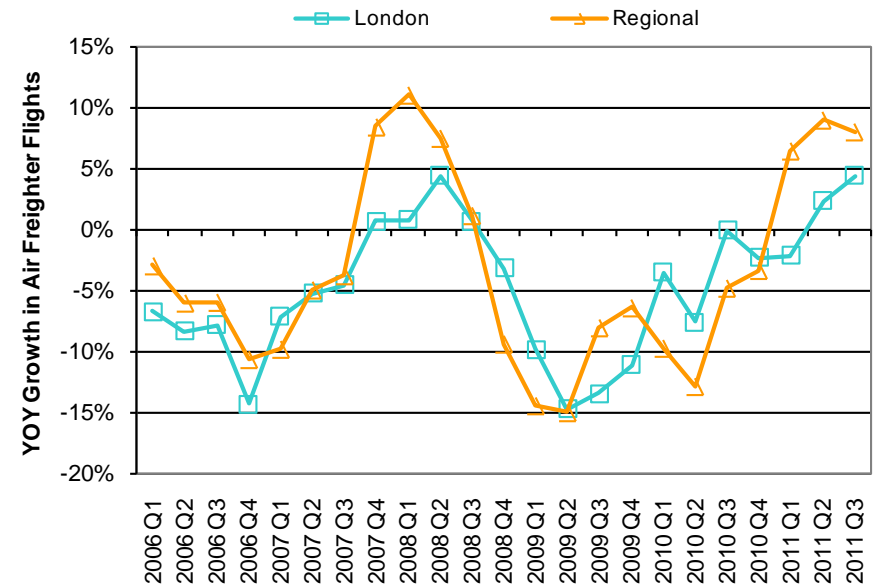
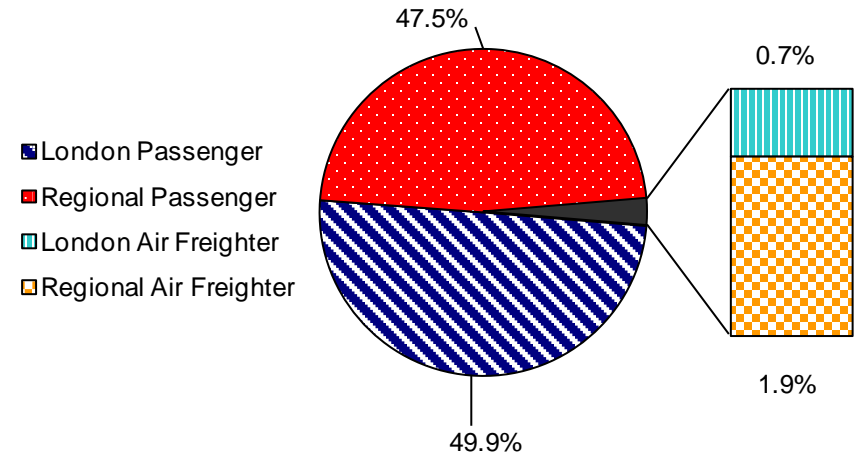
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2011		Q3 2010		+/- %	Q4 10 - Q3 11		Q4 09 - Q3 10		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>Air freighter</b>	<b>14.0</b>	<b>3%</b>	<b>13.1</b>	<b>2%</b>	<b>7.0%</b>	<b>51.8</b>	<b>3%</b>	<b>50.0</b>	<b>3%</b>	<b>3.6%</b>
London	3.7	1%	3.6	1%	4.4%	14.1	1%	14.0	1%	0.6%
Regional	10.3	2%	9.5	2%	8.0%	37.7	2%	36.0	2%	4.8%
<b>Passenger flights</b>	<b>533.5</b>	<b>97%</b>	<b>539.6</b>	<b>98%</b>	<b>-1.1%</b>	<b>1,895.4</b>	<b>97%</b>	<b>1,879.6</b>	<b>97%</b>	<b>0.8%</b>
London	267.0	49%	266.0	48%	0.4%	970.8	50%	949.8	49%	2.2%
Regional	266.6	49%	273.6	50%	-2.6%	924.6	47%	929.7	48%	-0.6%
<b>Total flights</b>	<b>547.6</b>	<b>100%</b>	<b>552.7</b>	<b>100%</b>	<b>-0.9%</b>	<b>1,947.2</b>	<b>100%</b>	<b>1,929.5</b>	<b>100%</b>	<b>0.9%</b>
London	270.7	49%	269.6	49%	0.4%	984.9	51%	963.8	50%	2.2%
Regional	276.8	51%	283.1	51%	-2.2%	962.3	49%	965.7	50%	-0.4%

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 dropped by 0.9% in quarter 3 2011 compared to the same quarter in 2010. The number of passenger flights decreased by 1.1% while that of air freighter flights went up by 7.0%.

Flights Share (year to date)





## Did you know? Development of air passenger traffic in London over the past 20 years

Since 1990, air traffic in London has been on a steady upward trend, despite the recent decrease in the number of destinations served direct and the number of flights following the 2008/09 recession. Compared with 20 years ago, Londoners today are able to travel more conveniently to more destinations across the globe.

This table shows the number of destinations served from the five London airports (Heathrow, Gatwick, Stansted, Luton and London City) with 200 or more direct scheduled passenger flights per year (on average two or more departing flights per week).

Year	1990	1995	2000	2005	2010
UK	21	17	21	20	17
Europe	102	104	137	185	205
Africa	14	12	16	21	25
Middle East	13	13	13	15	13
Southeast Asia & Pacific* <sup>1</sup>	7	13	16	19	20
North America	27	30	34	31	31
Other Americas* <sup>2</sup>	7	9	13	10	11
<b>Total</b>	<b>191</b>	<b>198</b>	<b>250</b>	<b>301</b>	<b>322</b>

Source: CAA Airport Statistics

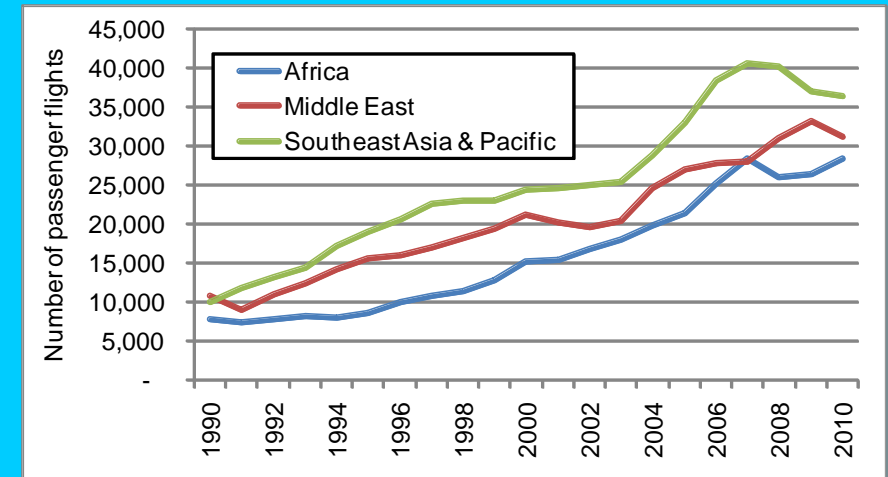
\*1 Southeast Asia & Pacific includes Indian Sub-Continent, Far East, Australia and New Zealand

\*2 Other Americas includes Central and South America and Caribbean Area

Over the past 20 years, the total number of destinations with a direct air route to London increased by 131, from 191 in 1990 to 322 in 2010. Among the new destinations (i.e. those served in 2010 but not in 1990), nearly four out of five were in Europe, thanks to European liberalisation stimulating the emergence of low-cost airlines that have made air travel more affordable since the late 1990s.

Compared to 1990, London is now better connected internationally, particularly to Africa, the Middle East and the Southeast Asia & Pacific\*<sup>1</sup> regions. The combined share of the number of flights to these regions rose from 5.4% in 1990 to 10.7% in 2010.

Number of passenger flights to and from London airports to destinations served with 200 or more direct scheduled passenger flights per year, 1990-2010



Source: CAA Airport Statistics

\*1 Southeast Asia & Pacific includes Indian Sub-Continent, Far East, Australia and New Zealand

While the number of destinations served in the Middle East remained at 13, the number of flights to the region nearly tripled from 10,800 to 31,200 in 20 years. In 1990, only five out of 13 Middle East airports were served by at least one daily return flight, and only Dubai was connected to London by three return flights per day. In 2010, there was at least one return flight per day to all 13 destinations, and three airports (Dubai, Doha and Tel Aviv) were served by at least five return flights per day.

## 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.