

Aviation Trends

Quarter 1 2010



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Introduction

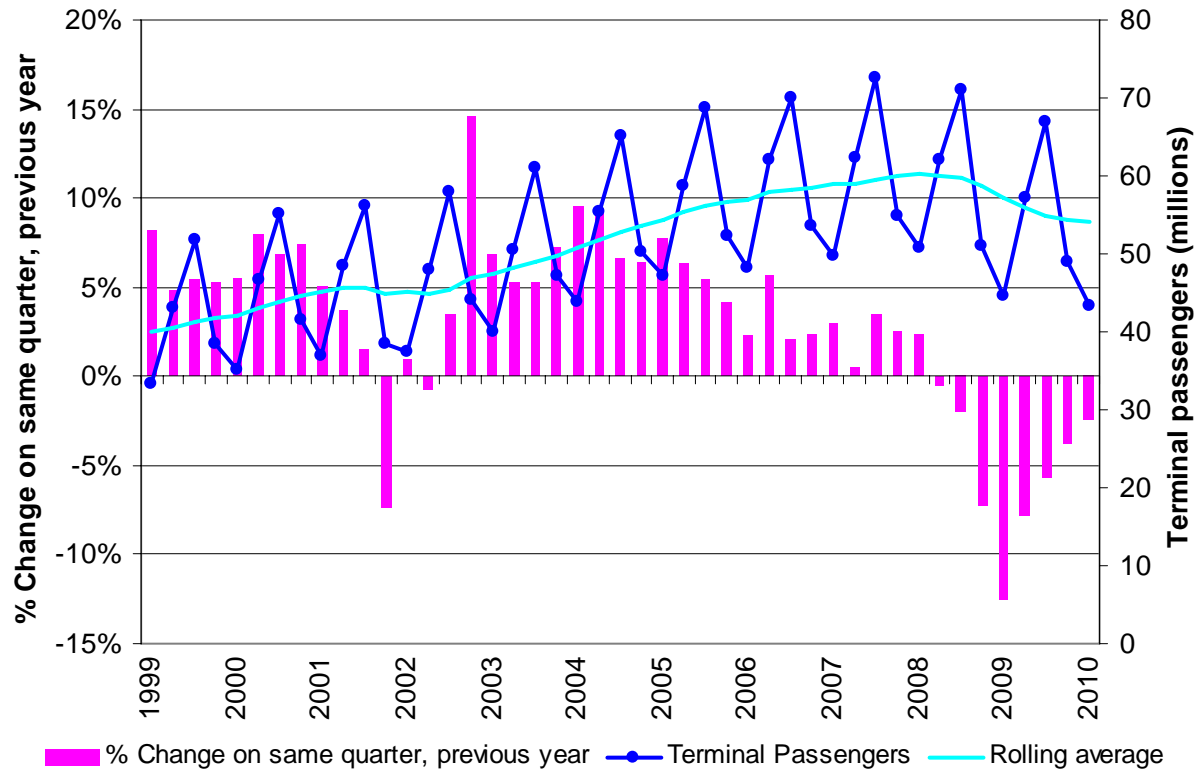
Welcome to Aviation Trends. Every quarter we update key figures which summarise the levels of activity at the UK's airports. Each edition also includes a section entitled 'Did you know?' which aims to present interesting facts derived from the various data sources available to the CAA; this time we show the number of flights operated by each airline alliance at the six busiest European 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 1 2010 compared to 2009, albeit at a slower pace than in previous quarters.

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 continued in quarter 1 2010, with a 2.4% reduction, although the pace of contraction has been declining since quarter 1 2009.

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

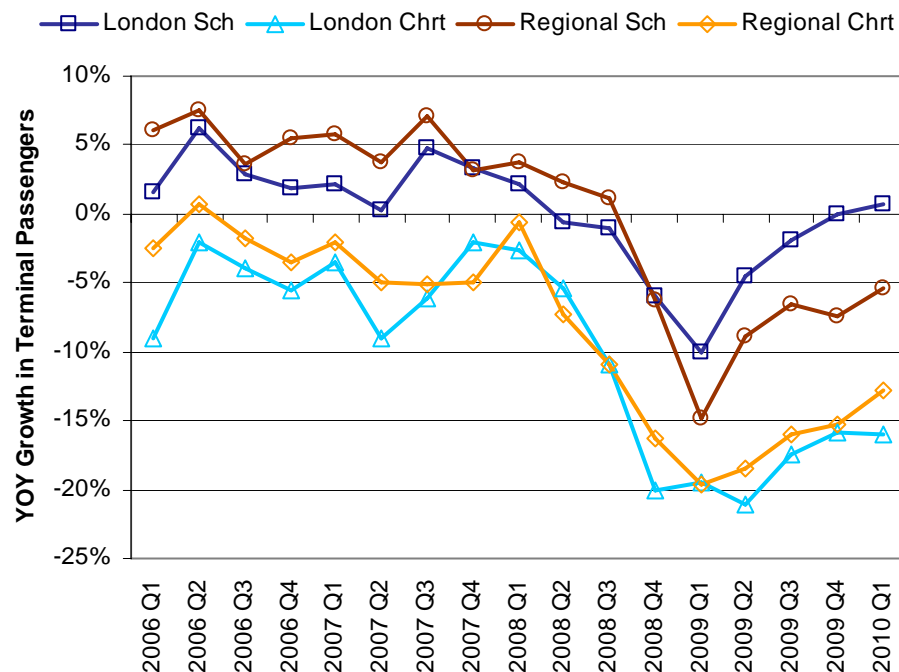
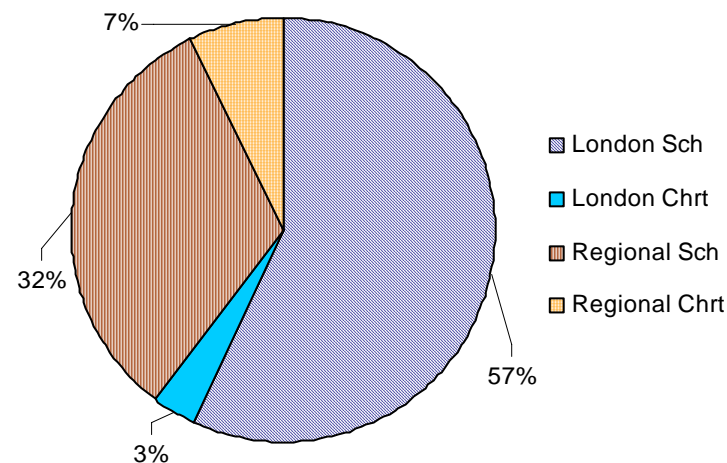
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2010		Q1 2009		+/- %	Q2 09 – Q1 10		Q2 08 – Q1 09		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
London Airports	27.3	63%	27.3	62%	-0.1%	130.0	60%	133.6	59%	-2.7%
- Scheduled	26.1	60%	25.9	59%	0.7%	122.7	57%	124.8	55%	-1.7%
- Charter	1.1	3%	1.4	3%	-16.0%	7.2	3%	8.8	4%	-18.0%
Regional Airports	15.9	37%	17.0	38%	-6.3%	85.7	40%	94.2	41%	-8.9%
- Scheduled	13.9	32%	14.7	33%	-5.3%	70.0	32%	75.4	33%	-7.1%
- Charter	2.0	5%	2.3	5%	-12.9%	15.7	7%	18.8	8%	-16.2%
All Airports	43.2	100%	44.3	100%	-2.5%	215.7	100%	227.8	100%	-5.3%
- Scheduled	40.0	93%	40.6	92%	-1.5%	192.8	89%	200.2	88%	-3.7%
- Charter	3.1	7%	3.7	8%	-14.0%	23.0	11%	27.6	12%	-16.8%

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 1 2010 the decline in scheduled passengers at all airports was 1.5%, and the decline in charter passengers was 14%. The number of scheduled passengers at regional airports fell by 5.3%, in quarter 1 2010, whereas London airports saw 0.7% growth. The charter passenger fall was smaller at regional airports (12.9%) than at London airports (16%).

Passenger Share (year to date)



3. Passenger flights to and from UK airports^{5,7,11}

Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2010		Q1 2009			Q2 09 – Q1 10		Q2 08 – Q1 09		
	Flights (000s)	% of total	Flights (000s)	% of total	+/- %	Flights (000s)	% of total	Flights (000s)	% of total	+/- %
London Airports	220.2	52%	230.9	51%	-4.6%	978.0	50%	1,040.6	49%	-6.0%
- Scheduled	214.0	51%	223.6	50%	-4.3%	938.9	48%	994.3	47%	-5.6%
- Charter	6.2	1%	7.2	2%	-13.9%	39.0	2%	46.3	2%	-15.7%
Regional Airports	201.7	48%	220.7	49%	-8.6%	960.7	50%	1,073.9	51%	-10.5%
- Scheduled	189.1	45%	206.1	46%	-8.2%	870.9	45%	968.6	46%	-10.1%
- Charter	12.7	3%	14.6	3%	-13.4%	89.7	5%	105.3	5%	-14.8%
All Airports	422.0	100%	451.6	100%	-6.6%	1,938.6	100%	2,114.5	100%	-8.3%
- Scheduled	403.1	96%	429.7	95%	-6.2%	1,809.8	93%	1,962.8	93%	-7.8%
- Charter	18.9	4%	21.8	5%	-13.5%	128.8	7%	151.6	7%	-15.1%

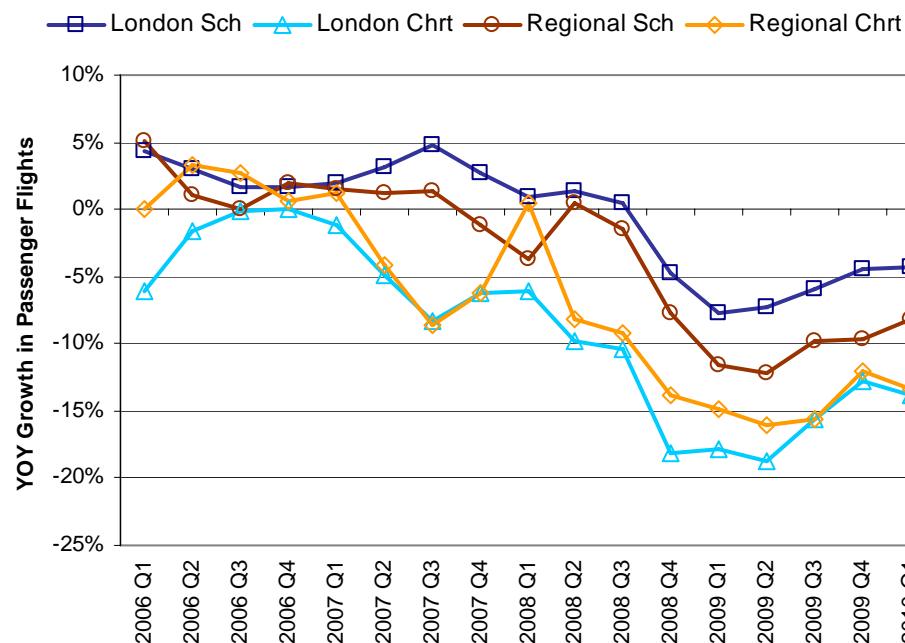
Source: CAA Airport Statistics

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 2010 were down 6.6% (approximately 30,000) on quarter 1 2009. Rolling year flights fell 8.3%, which represents around 176,000 flights.

The fall in flight numbers was higher at regional airports (8.6%) than London airports (4.6%), and the fall in charter flights (13.5%) was proportionately greater than the fall in scheduled flights (6.2%).

Flight Share (year to date)

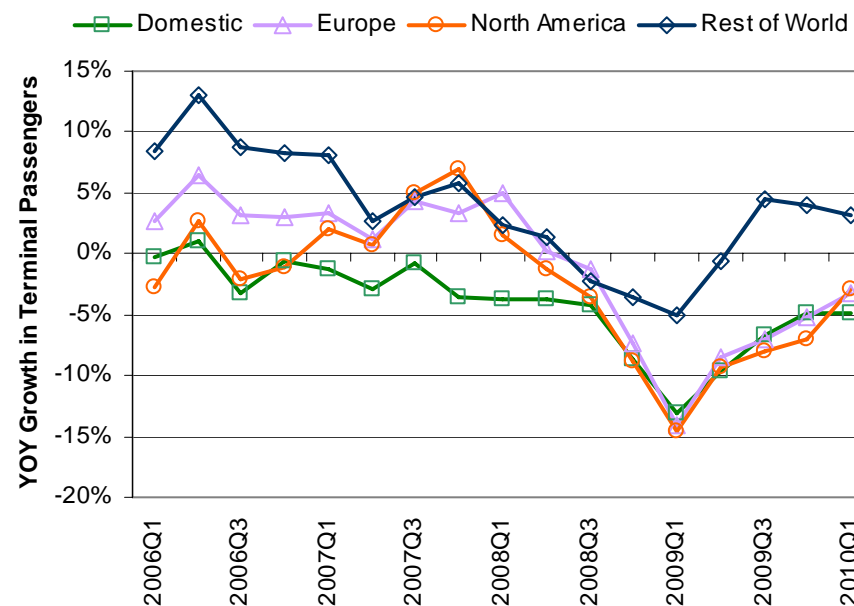
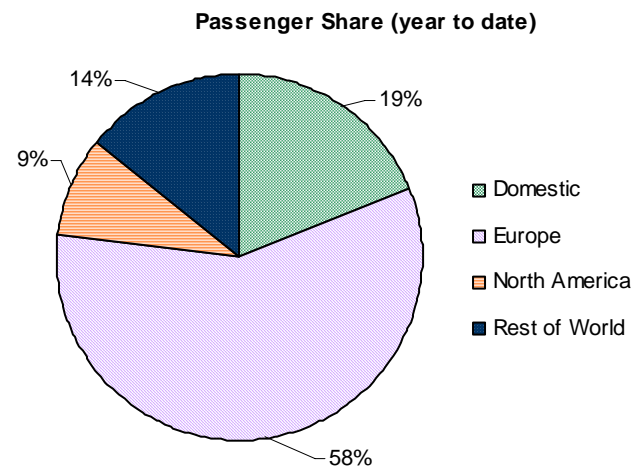


4. Terminal passengers at UK airports by origin / destination^{6,7,8,9,11}

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2010		Q1 2009		+/- %	Q2 09 – Q1 10		Q2 08 – Q1 09		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
Domestic	8.7	20%	9.2	21%	-4.8%	40.9	19%	43.8	19%	-6.6%
- Scheduled	8.7	20%	9.1	21%	-4.9%	40.6	19%	43.5	19%	-6.7%
- Charter	0.1	0.2%	0.1	0.2%	1.6%	0.3	0.2%	0.3	0.1%	1.9%
Europe	23.2	54%	24.0	54%	-3.3%	124.8	58%	133.3	59%	-6.3%
- Scheduled	21.0	49%	21.5	49%	-2.3%	106.4	49%	111.0	49%	-4.2%
- Charter	2.1	5%	2.4	5%	-11.9%	18.4	9%	22.3	10%	-17.2%
North America	3.7	9%	3.8	9%	-3.0%	19.6	9%	21.2	9%	-7.3%
- Scheduled	3.7	9%	3.8	9%	-2.7%	19.2	9%	20.5	9%	-6.3%
- Charter	0.0	0.1%	0.0	0.1%	-29.2%	0.4	0.2%	0.7	0.3%	-35.1%
Rest of World	7.6	18%	7.3	17%	3.2%	30.4	14%	29.5	13%	2.8%
- Scheduled	6.7	15%	6.2	14%	7.1%	26.6	12%	25.2	11%	5.5%
- Charter	0.9	2%	1.1	2%	-19.1%	3.7	2%	4.3	2%	-13.0%
Total	43.2	100%	44.3	100%	-2.5%	215.7	100%	227.8	100%	-5.3%
- Scheduled	40.0	93%	40.6	92%	-1.5%	192.8	89%	200.2	88%	-3.7%
- Charter	3.1	7%	3.7	8%	-14.0%	23.0	11%	27.6	12%	-16.8%

Source: CAA Airport Statistics

Passenger numbers to the UK (domestic), Europe and North America fell by 4.8%, 3.3% and 3.0%, respectively, in quarter 1 2010 compared to quarter 1 2009. In contrast, passengers travelling to and from 'Rest of World' destinations (which made up 18% of total passengers) grew by 3.2%.



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

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2010		Q1 2009		+/- %	Q2 09 – Q1 10		Q2 08 – Q1 09		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
Cargo on cargo only flights	205	34%	196	38%	4.6%	828	35%	867	36%	-4.6%
London	81	13%	74	14%	9.6%	324	14%	343	14%	-5.6%
Regional	123	20%	122	23%	1.6%	504	22%	524	22%	-3.9%
Bellyhold cargo	401	66%	322	62%	24.7%	1,514	65%	1,530	64%	-1.0%
London	379	63%	305	59%	24.3%	1,428	61%	1,440	60%	-0.8%
Regional	22	4%	17	3%	32.1%	86	4%	90	4%	-4.1%
Total cargo	606	100%	518	100%	17.1%	2,341	100%	2,397	100%	-2.3%
London	460	76%	379	73%	21.4%	1,751	75%	1,783	74%	-1.8%
Regional	146	24%	138	27%	5.3%	590	25%	614	26%	-3.9%

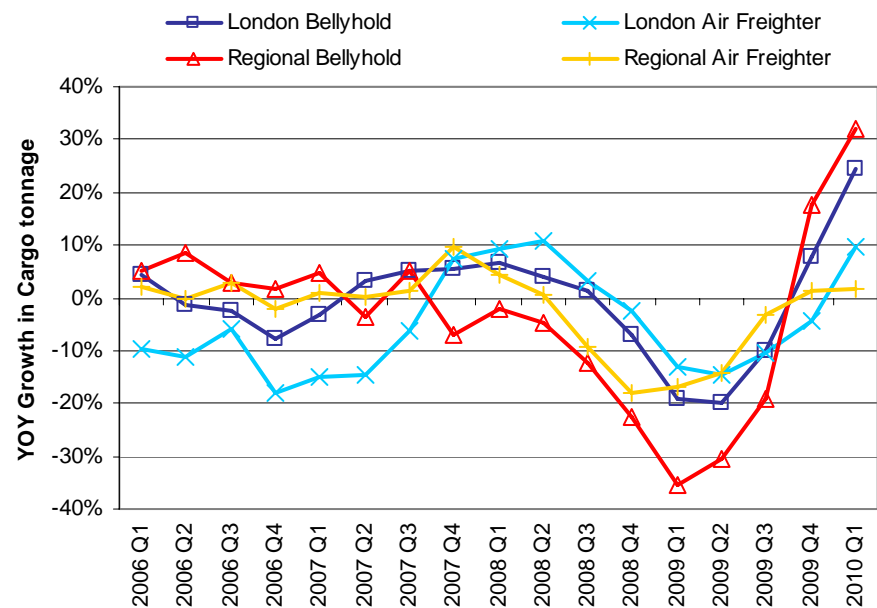
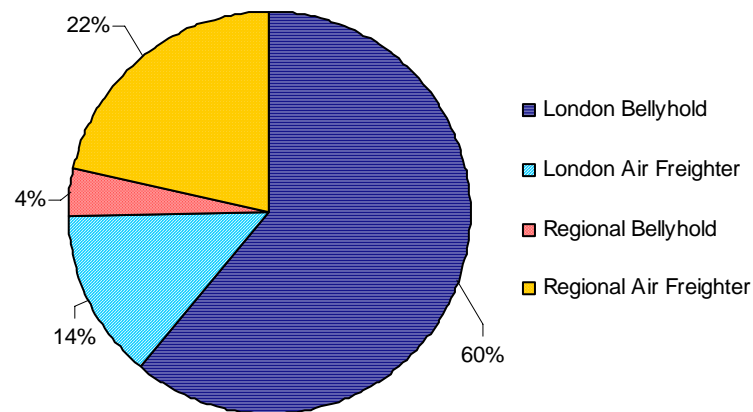
Source: CAA Airport Statistics

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 17% in quarter 1 2010.

Bellyhold cargo tonnage increased by 25% in quarter 1 2010 compared to quarter 1 2009. Over the same period, air freighter tonnage increased by 4.6%.

Cargo Share (year to date)



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

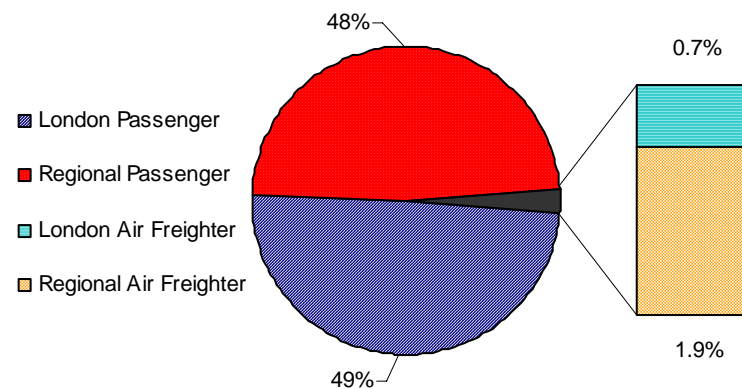
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2010		Q1 2009		+/- %	Q2 09 – Q1 10		Q2 08 – Q1 09		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
Air freighter	12	3%	13	3%	-6.5%	52	3%	58	3%	-9.8%
London	4	1%	4	1%	-3.6%	14	1%	16	1%	-11.0%
Regional	9	2%	10	2%	-7.7%	38	2%	42	2%	-9.4%
Passenger flights	422	97%	452	97%	-6.6%	1,939	97%	2,114	97%	-8.3%
London	220	51%	231	50%	-4.6%	978	49%	1,041	48%	-6.0%
Regional	202	46%	221	47%	-8.6%	961	48%	1,074	49%	-10.5%
Total flights	434	100%	465	100%	-6.6%	1,991	100%	2,172	100%	-8.4%
London	224	52%	234	50%	-4.6%	992	50%	1,057	49%	-6.1%
Regional	211	48%	230	50%	-8.5%	999	50%	1,116	51%	-10.5%

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.

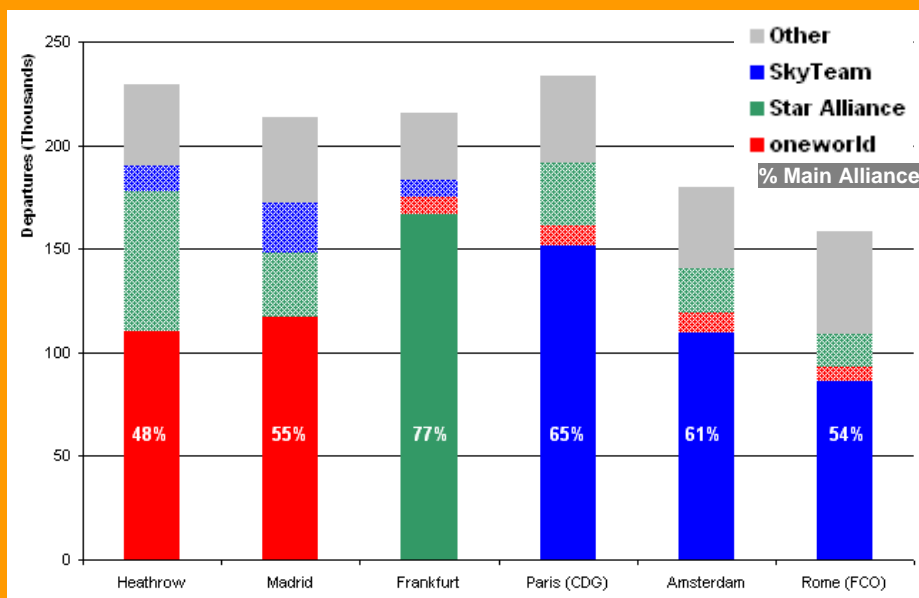
Total commercial flights in the UK decreased by 6.6% in quarter 1 2010 compared to quarter 1 2009. The decline in air freighter flights (6.5%) was similar to that of passenger flights (6.6%).

Flights Share (year to date)



Did you know? Alliance Presence at Six European Hub Airports

Number of Flights at European Hubs by Airline Alliance (Year to March 2010)



Source: OAG*

Note: Main airlines at these hub airports:

oneworld: BA (Heathrow), Iberia (Madrid)

Star Alliance: Lufthansa (Frankfurt)

SkyTeam: Air France (Paris), KLM (Amsterdam), Alitalia (Rome)

This chart uses data from OAG* to show the number of flights scheduled in the year to March 2010 by the three main airline alliances at the six busiest European hub airports.

Star Alliance is the main alliance group operating at Frankfurt; SkyTeam is the main alliance at Paris (CDG), Amsterdam and Rome (FCO) whereas oneworld is the main alliance at London Heathrow and Madrid.

Compared with the other European hub airports, Heathrow had the smallest concentration of slots owned by a single alliance with 48% of flights at the airport being operated by oneworld. The number of oneworld departures at Heathrow in the year to March 2010 (110 thousand) was also fewer than Star Alliance's at Frankfurt (167 thousand) and SkyTeam's at Paris CDG (152 thousand).

Of the routes at Heathrow, 60% were served by two or more airlines compared with between 39% and 53% of routes at the other five hub airports.

*The Official Airline Guide details scheduled services operated at world airports

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.