

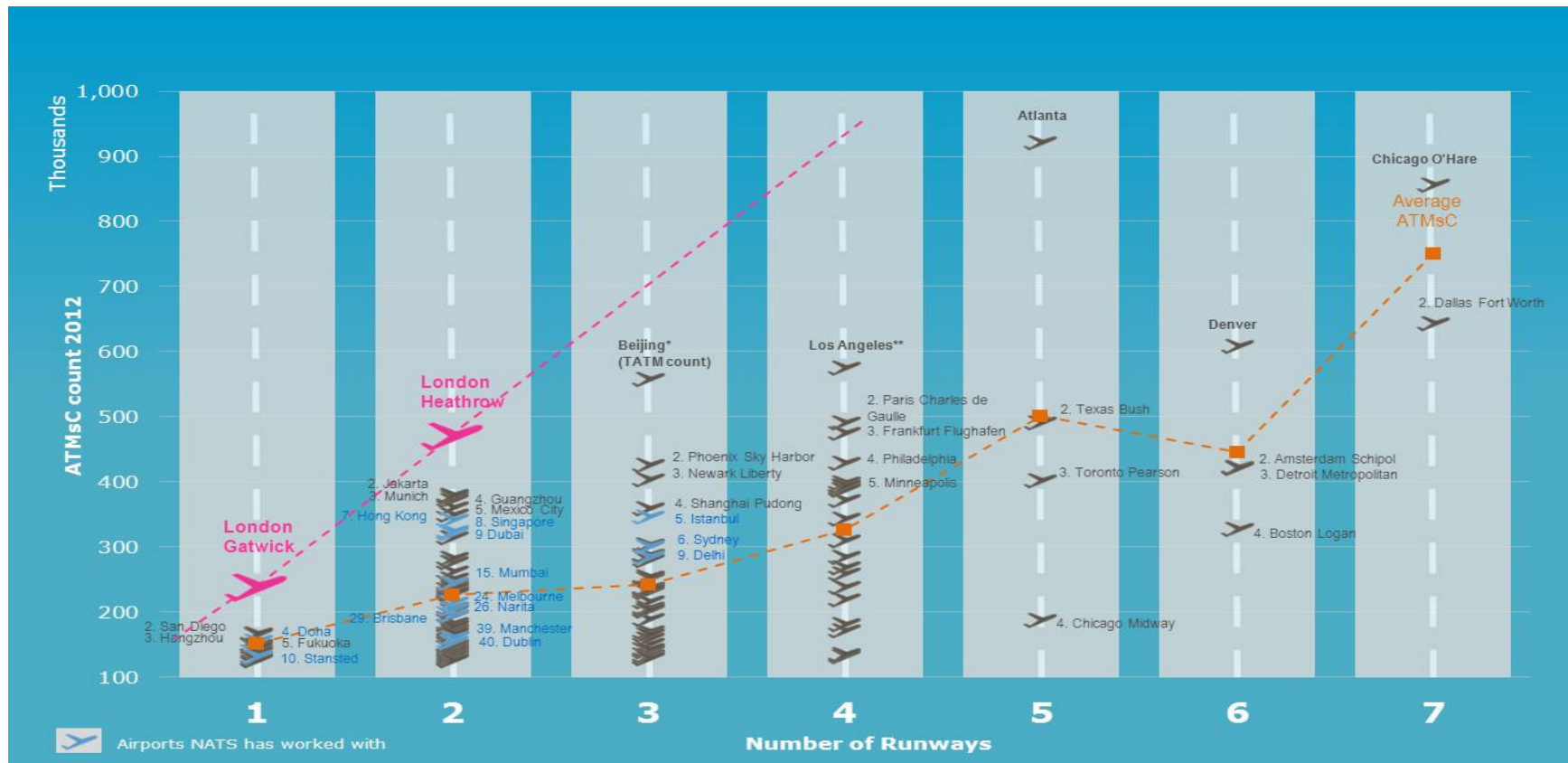


Interim Report

Conclusions and Recommendations

Howard Davies, Chair
One Great George Street
17 December 2013

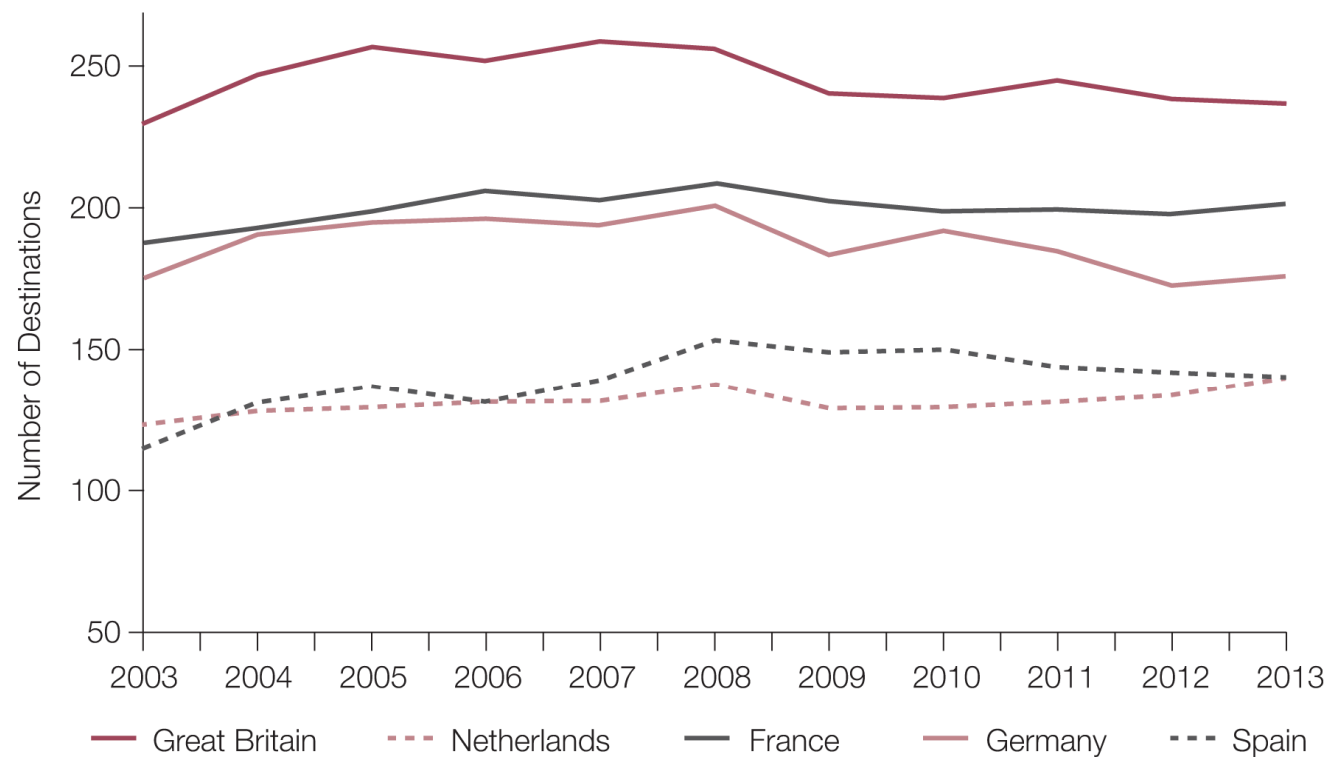
Gatwick and Heathrow: the most heavily used 1 and 2 runway airports in the world



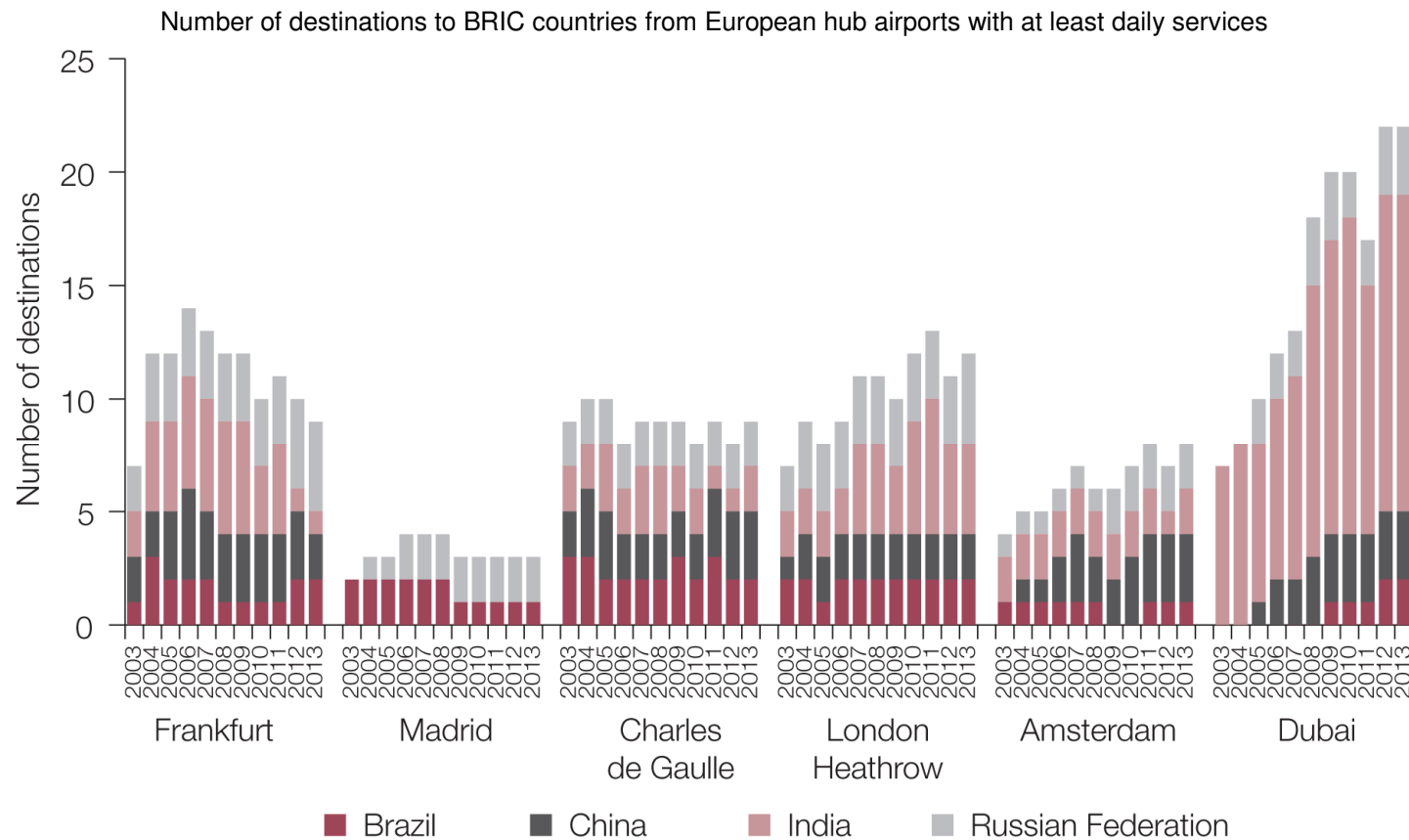
Source: National Air Traffic Services (NATS)

UK serves more destinations on a daily basis than any other European country

Number of destinations served daily, 2003-2013



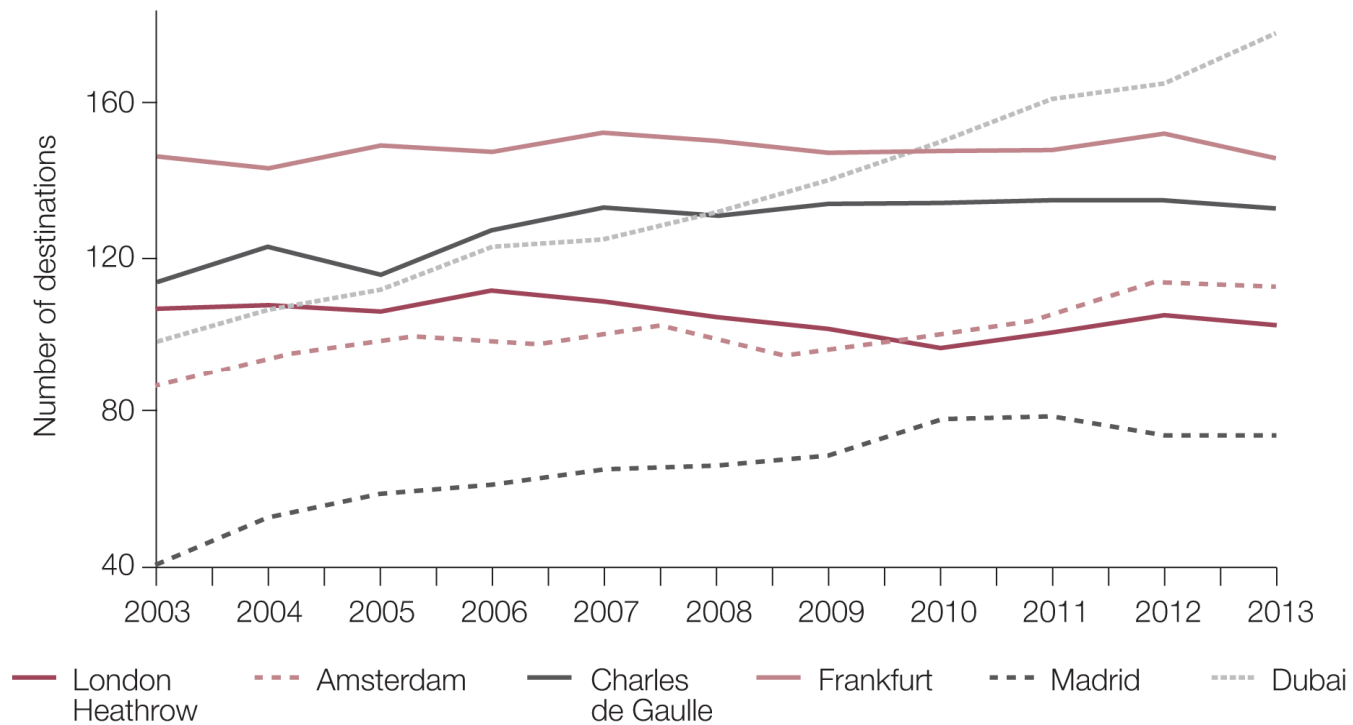
Source: CAA analysis based on OAG data



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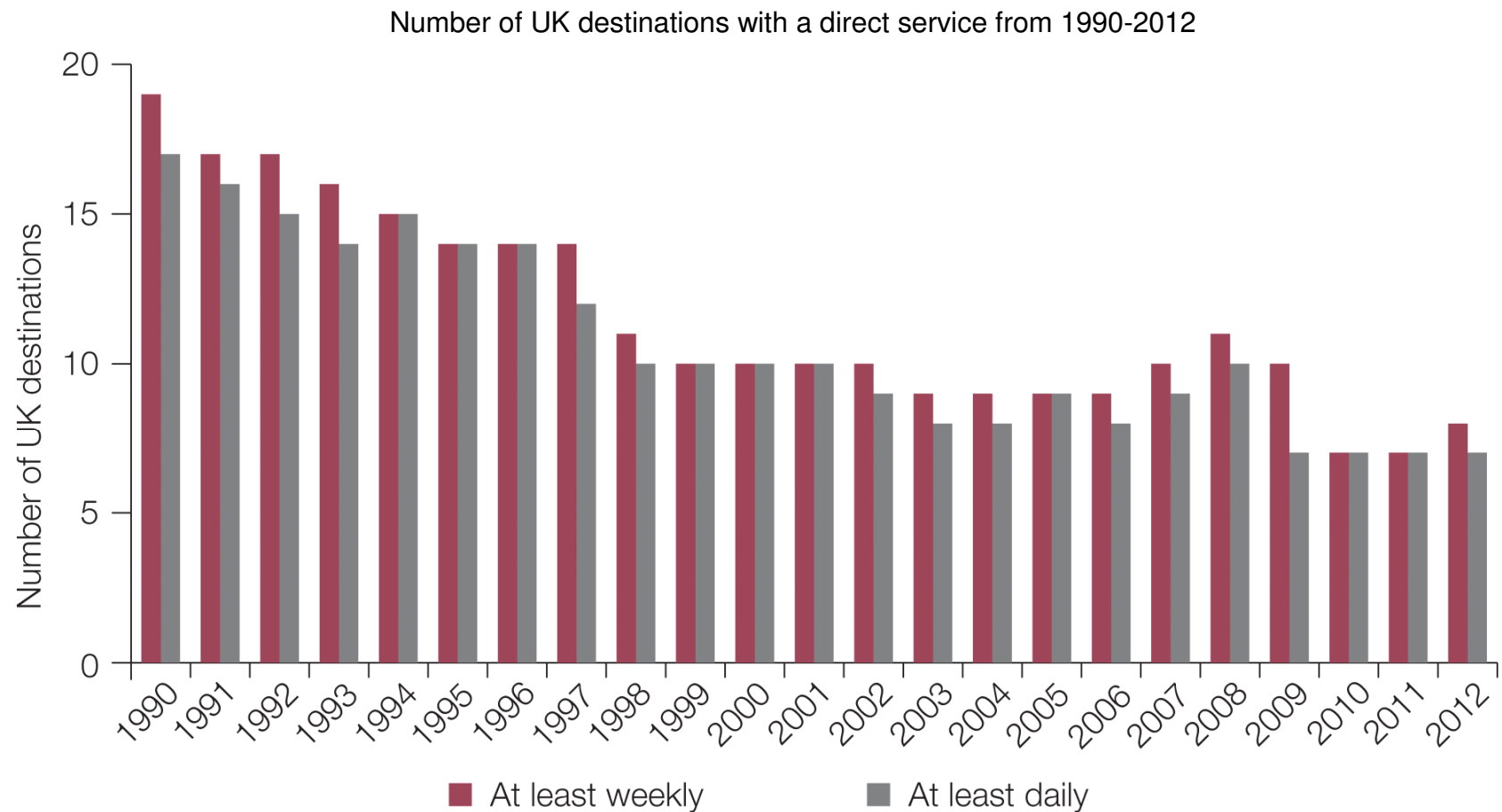
Dubai International has seen a dramatic increase in long-haul destinations served since 2003

Changes in number of long-haul destinations at major airports



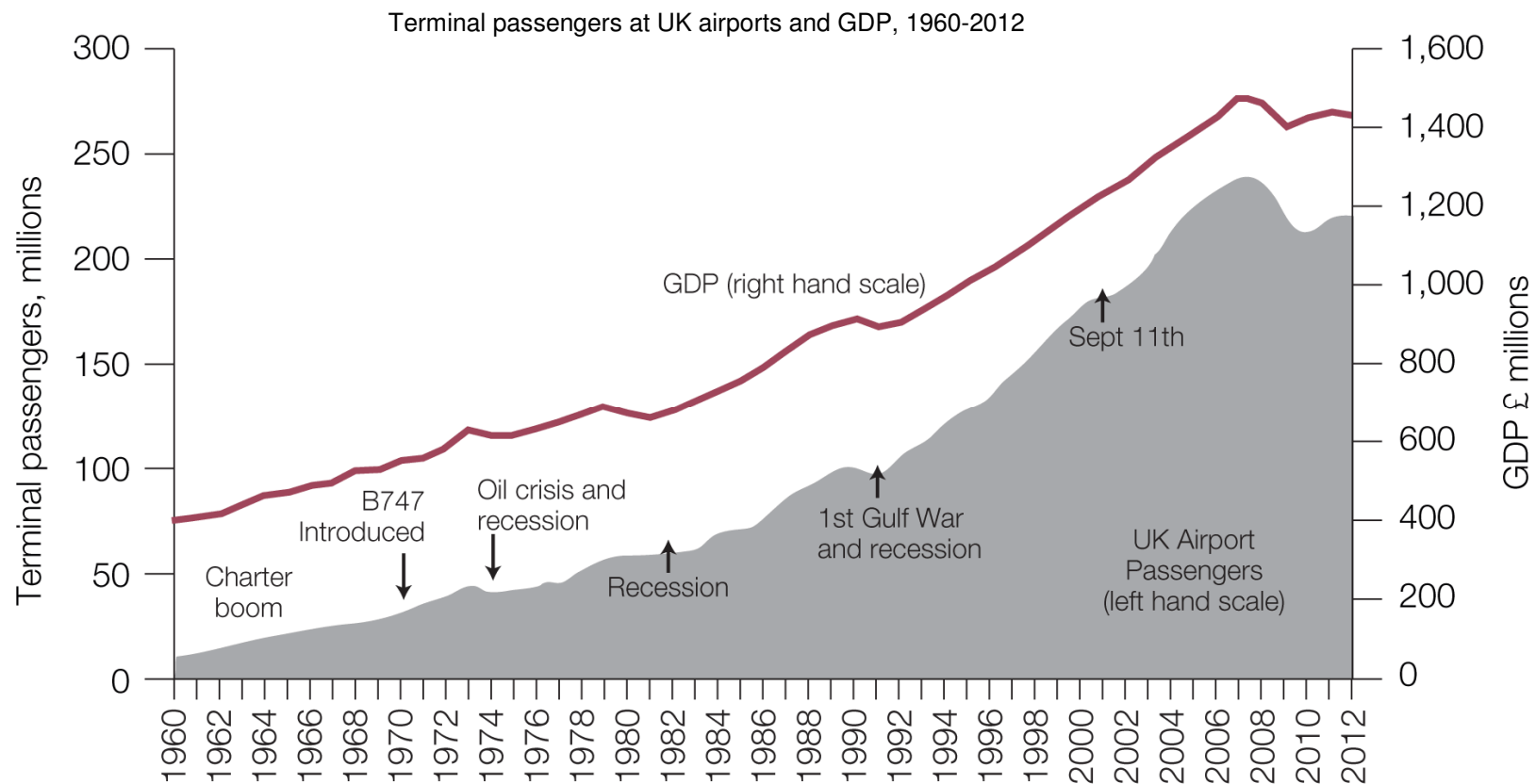
Source: PwC analysis based on Sabre ADI

The number of UK destinations served from Heathrow has steadily decreased since 1990



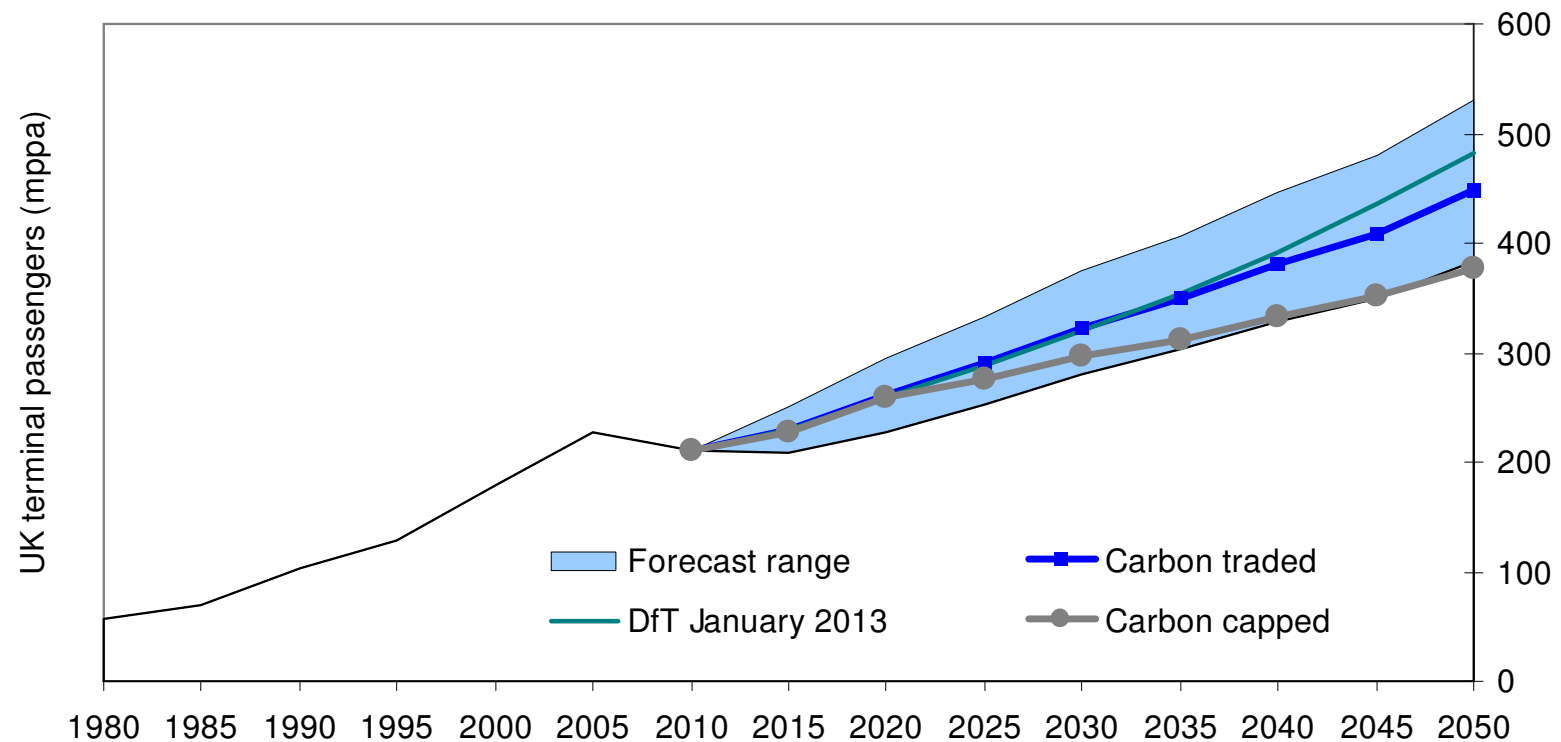
Source: DfT analysis based on CAA airport statistics

Historically passenger demand for aviation has risen in line with or faster than GDP since 1960



Source: DfT analysis based on CAA statistics and ONS data

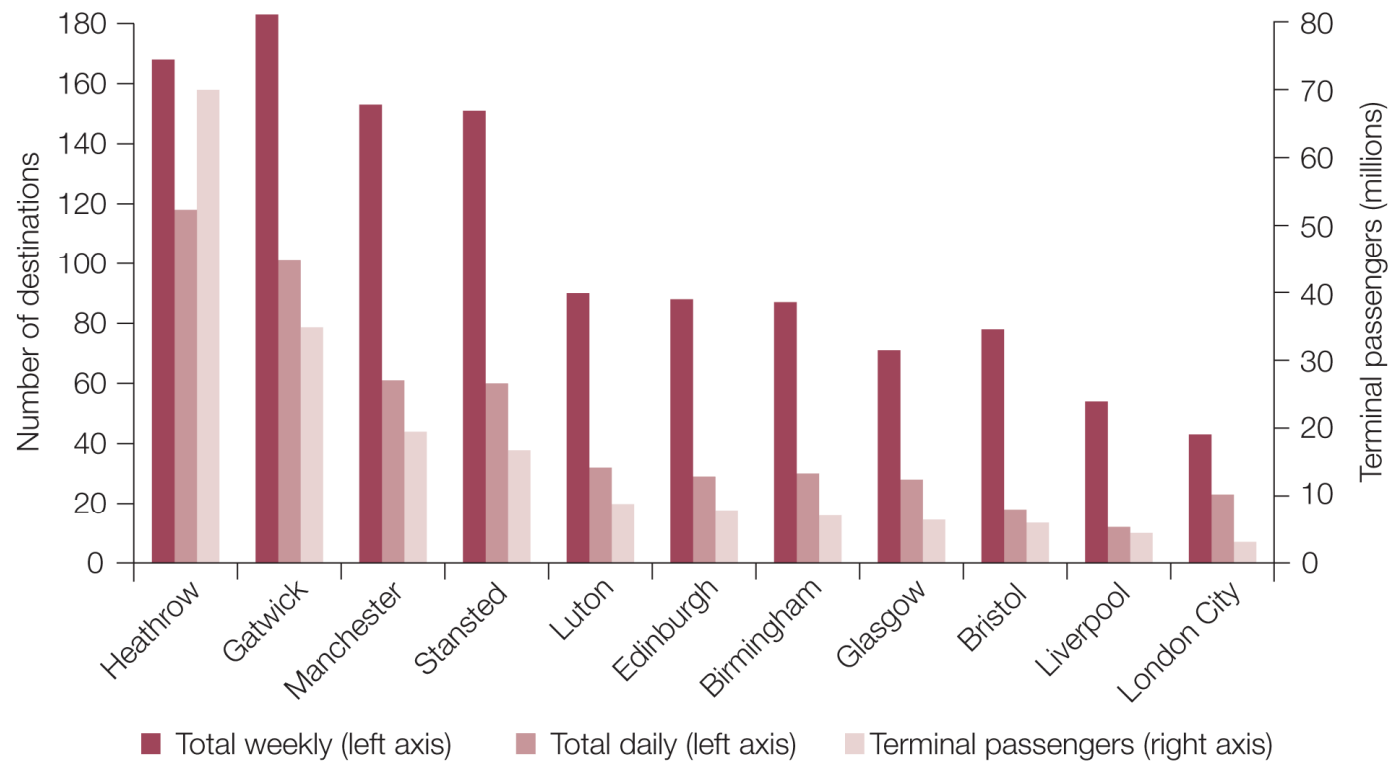
Aviation demand is likely to increase significantly between now and 2050, even with considerably higher carbon prices



Unconstrained capacity

The UK air travel market is highly concentrated at the country's four largest airports

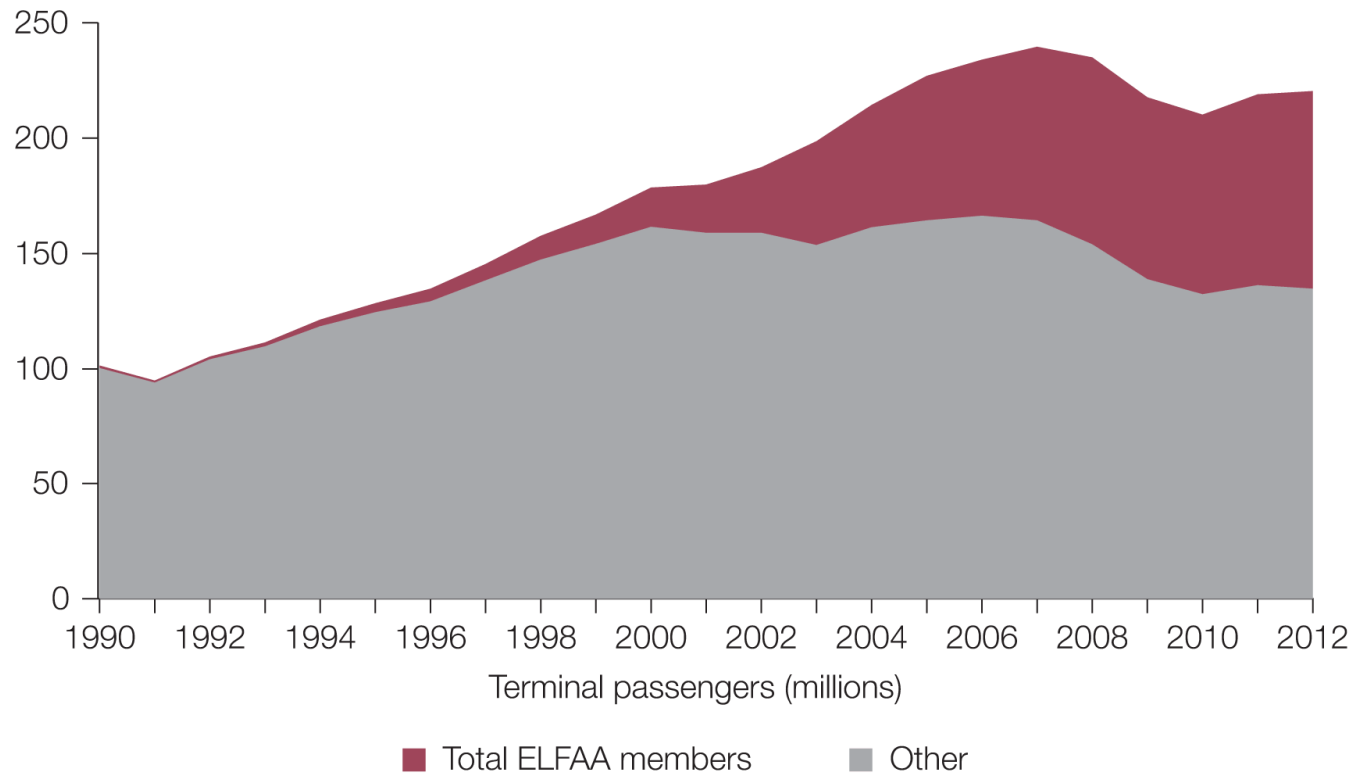
Number of passengers and destinations served, selected airports in 2012



Source: DfT analysis based on CAA airport statistics

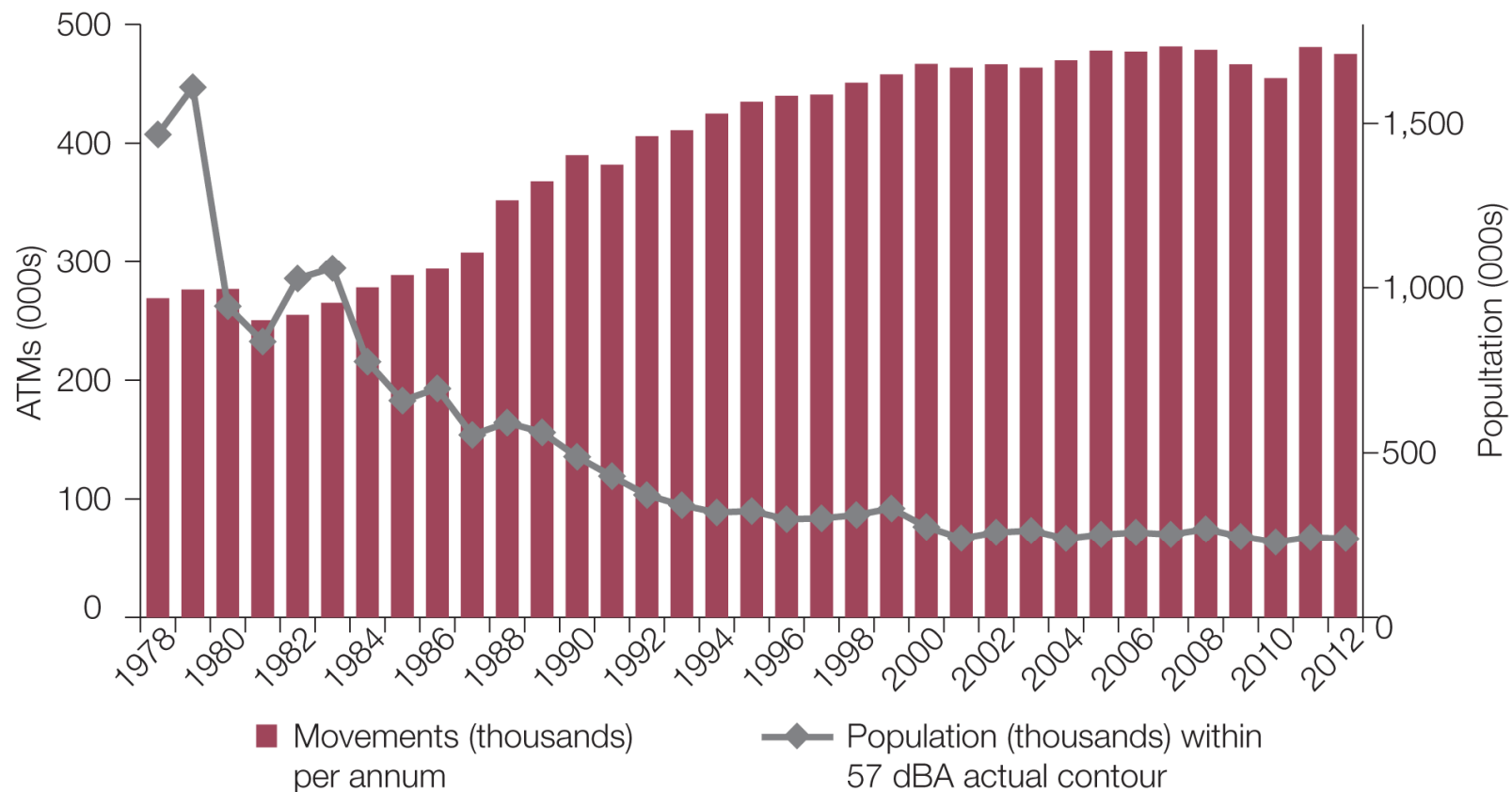
Most significant growth in demand over recent years has been seen in the low cost sector

Passengers at UK airports by ELFAA membership, 1990-2012



Source: DfT analysis based on CAA airport statistics

Numbers of people living within the 57L_{Aeq} contour and the numbers of air traffic movements



Source: CAA



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