



## **Report to Partnership Meeting 12 September 2025**

### **Research and Strategy Delivery**

#### **Selected Low Volume Air Services in the Highlands and Islands – Historical Analysis**

#### **PURPOSE OF REPORT**

To share with Members the findings of a historical analysis of selected low volume air services in the Highlands and Islands region between 2014 and 2024. The report, prepared by Reference Economic Consultants, aims to provide insight into usage trends, capacity, and operational characteristics on a number of key routes which support regional connectivity. The analysis is intended to inform strategic decision-making around future air service development, investment, and policy engagement.

#### **BACKGROUND**

HITRANS has a long-standing commitment to ensuring that air connectivity supports economic, social, and geographic inclusion across the Highlands and Islands. Scheduled air services remain critical in connecting remote communities to essential services, employment, education and wider transport networks.

While much attention is given to major trunk air routes, a number of lower volume services provide lifeline connectivity for peripheral and island communities. These routes often operate under fragile commercial conditions or with public service obligations (PSOs). Understanding historical trends and changes in supply and demand on these services is essential to shaping a sustainable future for air transport in the region.

In this context, HITRANS commissioned Reference Economic Consultants to undertake a detailed review of nine selected air routes. The study draws on Civil Aviation Authority (CAA) passenger data and scheduled service information from OAG Aviation, covering the years 2014, 2019, and 2024.

The routes analysed in the current report are:

- Benbecula–Stornoway
- Inverness–Birmingham
- Stornoway–Inverness
- Aberdeen–Stornoway
- Wick–Aberdeen
- Wick–Edinburgh
- Benbecula–Glasgow
- Glasgow–Islay
- Inverness–Manchester

Further work is planned to expand the analysis to cover additional low volume routes which are also significant in the regional network. These will include:

- Kirkwall–Inverness
- Stornoway–Edinburgh
- Barra–Glasgow
- Campbeltown–Glasgow
- Tiree–Glasgow

## SUMMARY OF FINDINGS

The report identifies a range of trends that highlight both resilience and volatility in low volume air services:

- Passenger demand showed general growth up to 2019, followed by a sharp fall during the Covid-19 pandemic. Recovery has been mixed, with some routes returning to near pre-pandemic levels, while others remain significantly below.
- Service frequency and aircraft types have shifted over time, often influenced by operator changes and commercial pressures. In several cases, aircraft size has increased while frequency has decreased, affecting accessibility.
- Load factors on many routes remain low, particularly on intra-regional services. This underscores the challenge of sustaining commercial viability without public support.
- Public Service Obligation (PSO) arrangements, such as those on the Wick–Aberdeen route, have played a key role in restoring or retaining air access in some communities.
- Seasonality of demand varies across routes but tends to be more pronounced on services with a tourism component. However, many routes show year-round usage consistent with essential travel needs.

These insights will support HITRANS and partners in shaping future business cases, engaging with operators and funders, and advocating for rural and island connectivity in national aviation policy.

## NEXT STEPS

The report will be updated to include analysis of the four additional routes noted above. Once completed, the full evidence base will support:  
 Development of long-term air services strategies for the Highlands and Islands  
 Inputs to aviation policy consultations and funding programmes  
 Coordination with local authorities, Transport Scotland, and other key stakeholders

## RECOMMENDATION

Members are asked to note the findings of the report and support the ongoing work to expand the analysis.

## RISK REGISTER

### RTS Delivery

Impact – Positive

Comment – The analysis supports RTS outcomes by improving understanding of regional air connectivity, informing sustainable transport planning across the Highlands and Islands.

### Policy

Impact – Positive

Comment – Aligns with Scottish Government and UK aviation strategies by contributing data

to support future policy development, including air services sustainability, net zero targets, and regional equity.

#### Financial

Impact – Neutral

Budget line and value – Project delivery is supported through core HITRANS budget allocation. Future route analysis subject to resource availability.

#### Equality

Impact – Positive

Comment – Supports efforts to reduce geographical inequality by highlighting the role of low volume air services in connecting island and remote mainland communities to essential services.

### **RECOMMENDATION**

Members are asked to note the findings of the report and support the ongoing work to expand the analysis.

|                    |   |
|--------------------|---|
| Report by:         | Ranald Robertson  |
| Designation:       | Partnership Director  |
| Date:              | 12 August 2025  |
| Background papers: | Appendix A – Selected Low Volume Air Services Historical Analysis (2014–2024) |

**Selected Low Volume Air Services  
in the Highlands and Islands:  
Historical Analysis**

**Report**

**for**

**HITRANS**

**by**



**July 2025**

# **1 INTRODUCTION**

## **1.1 PURPOSE OF THE REPORT**

This report analyses selected low volume Highlands and Islands air routes. It shows historical trends in these services from 2014 to 2024.

## **1.2 SELECTED ROUTES**

Based on discussion with HITRANS the following routes were covered by the research:

- Benbecula-Stornoway.
- Inverness-Birmingham.
- Stornoway-Inverness.
- Aberdeen-Stornoway.
- Wick-Aberdeen.
- Wick-Edinburgh.
- Benbecula-Glasgow.
- Glasgow-Islay
- Inverness-Manchester.

Some of these routes have operated continuously between 2014 and the present day. Others ceased operating during the period between 2014 and the present day.

## **1.3 INFORMATION SOURCES**

### **1.3.1 Civil Aviation Authority (CAA)**

The following information was taken from the CAA website for each route:

- Annual passenger volumes.
- Monthly passenger volumes.

### **1.3.2 Information Provided by OAG Aviation**

OAG are specialist providers of airline schedules databases. They provided data for selected years (i.e. 2014, 2019 and 2024) for the relevant air routes covering:

- Operator.
- Aircraft type.
- Aircraft size.
- Annual number of scheduled seats.
- Days of operation.
- Flight frequency.

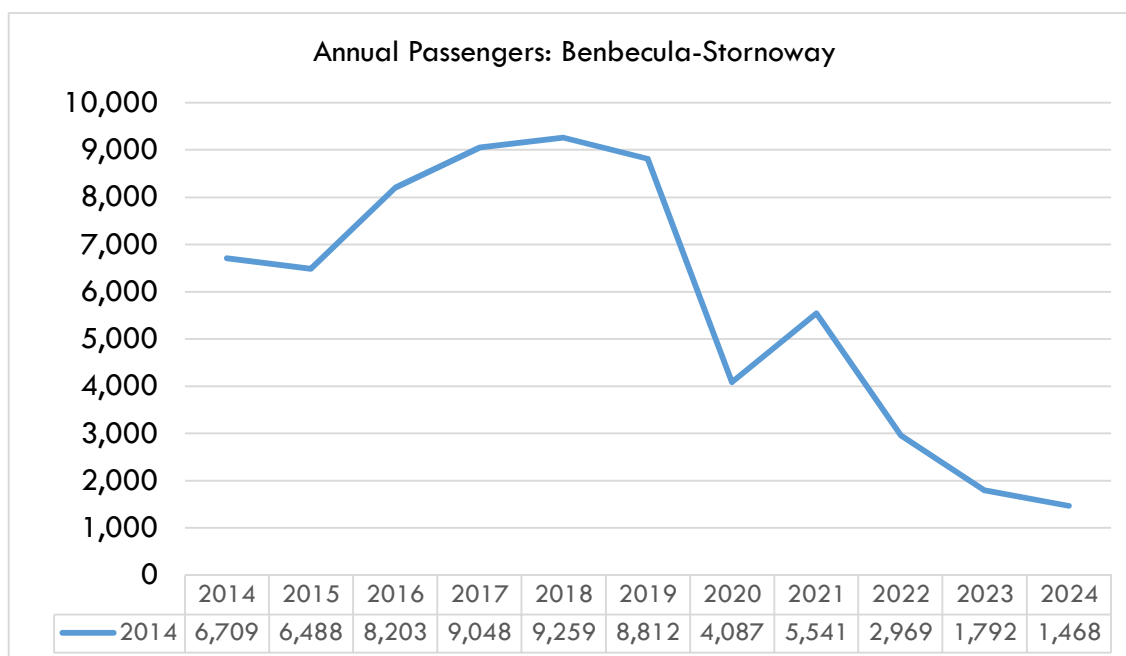
From the annual number of scheduled seats we were able to estimate passenger load factors by applying the actual number of passengers carried.

The above information for each route is set out in the Appendix to this report.

## 2 **ROUTE ANALYSIS**

### 2.1 **BENBECULA-STORNOWAY**

#### 2.1.1 Annual Passenger Numbers



Passenger traffic on the route grew from around 6,700 in 2014 to a peak of c9,200 in 2018. Passenger numbers fell during the period of Covid restrictions in 2020 and 2021 but were still around 5,500 in the latter year.

The further decline in passenger numbers was partly due to interruptions to the service-with fewer than 2,000 passengers carried in each of the last two years.

#### 2.1.2 Seasonality of Demand

Demand has not been particularly seasonal. The share of traffic in the months between April and September varied between 43% and 55% in the years 2014, 2019 and 2024.

#### 2.1.3 Schedule Analysis

Flybe operated the route in 2014, while Loganair did so in 2019. In 2024 a combination of Loganair and Hebridean Air provided the flights as the latter took over the route following Loganair's withdrawal.

In 2014 and 2019 the route was operated by Saab 340 aircraft with 33 seats. In 2024 when Loganair operated the service they used larger aircraft. These were ATR42/ATR 72 (48 seats) and Embraer RJ145 (49 seats). Since Hebridean Air took over the route it has operated Britten Norman Islander aircraft with 9 seats.

In 2014 just over 20,000 seats were provided. The number increased to over 26,000 in 2019, reflecting the increase in the number of days of operation.

However, the number of seats was only around 6,000 in 2024. This reflected some periods of discontinuity in operation of the service and, in particular, the use of the much smaller aircraft by Hebridean Air.

The number of days of operation changed over time. The service operated as follows:

- 2014: three days per week (Tuesday, Wednesday, Thursday).
- 2019: five days per week (Monday-Friday).
- 2024: two or three days per week (Loganair-Tuesday and Thursday; Hebridean Air-Monday, Tuesday, and either Thursday or Friday).

On the days when flights were operated there were:

- 2014: two return flights.
- 2019: two return flights on Tuesday, Wednesday and Thursday, and one return flight on Monday and Friday.
- 2024: two return flights.

The total number of scheduled flights (one way) were:

- 2014: 612.
- 2019: 796.
- 2024: 220.

These numbers reflect the increase in the number of days when flights operated in 2019 compared to 2014; and that flights only operated in six months of the year in 2024.

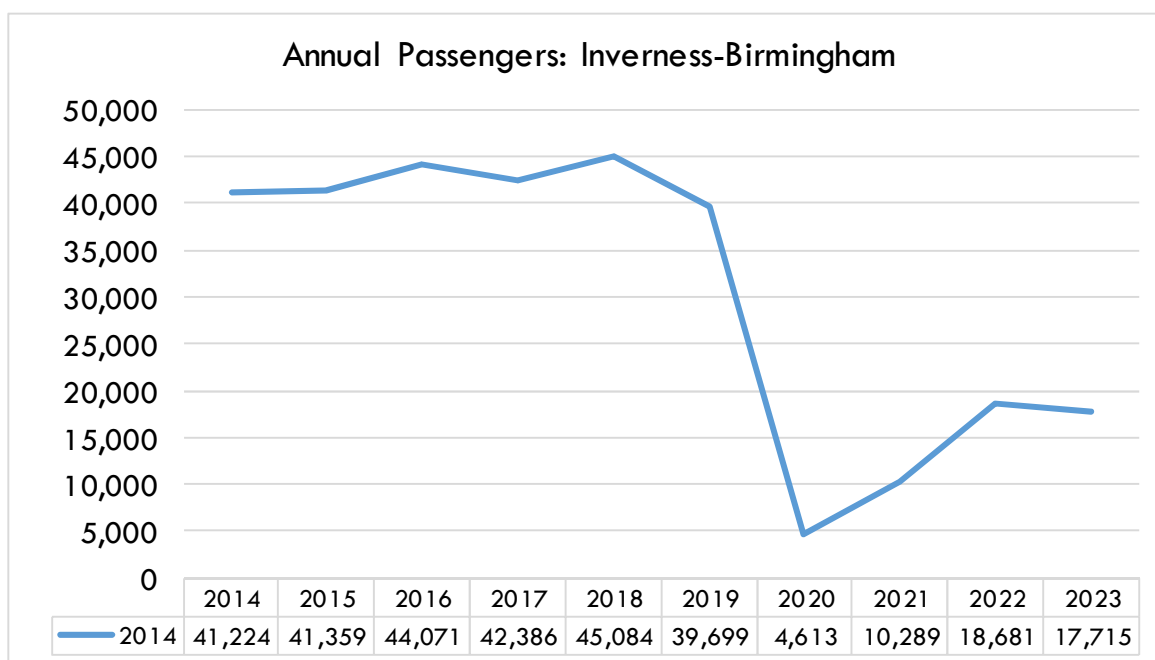
Estimated annual passenger load factors are:

- 2014: 33%.
- 2019: 34%.
- 2024: 25%.

**The number of seats available going forward will be much lower than in earlier years because of the limited number of seats (nine) available on the plane.**

## 2.2 INVERNESS-BIRMINGHAM

### 2.2.1 Annual Passenger Numbers



Passenger numbers grew from around 41,000 in 2014 to 45,000 in 2018. They then fell sharply during the period of Covid restrictions. While they grew again in 2022 they were less than half those seen in earlier years and actually fell in 2023. The route ceased operating in January 2024.

### 2.2.2 Seasonality of Demand

There was an element of seasonality of demand on the route. The traffic share of the six months between April and September were 60% in 2014 and 58% in 2019.

### 2.2.3 Schedule Analysis

Flybe operated the route in both 2014 and 2019. In both years the service was operated by Bombardier DHC8 (78 seats) and Embraer 175 (88 seats). The number of seats offered in 2014 was slightly below 60,000. This fell to around 51,000 in 2019, a decrease of around 14%.

The number of days per week when flights operated were quite similar in 2014 and 2019. The winter months saw either a 5 day or 6 day operation, while during the rest of the year there were daily flights.

However, there was a greater frequency of flight in 2014 compared to 2019. In the former year there were 2 returns per day on weekdays between mid-July and early September, while 2019 saw no more than a single flight per day.

The total number of scheduled flights (one way) were:

- 2014: 744.
- 2019: 656.



Estimated annual passenger load factors are:

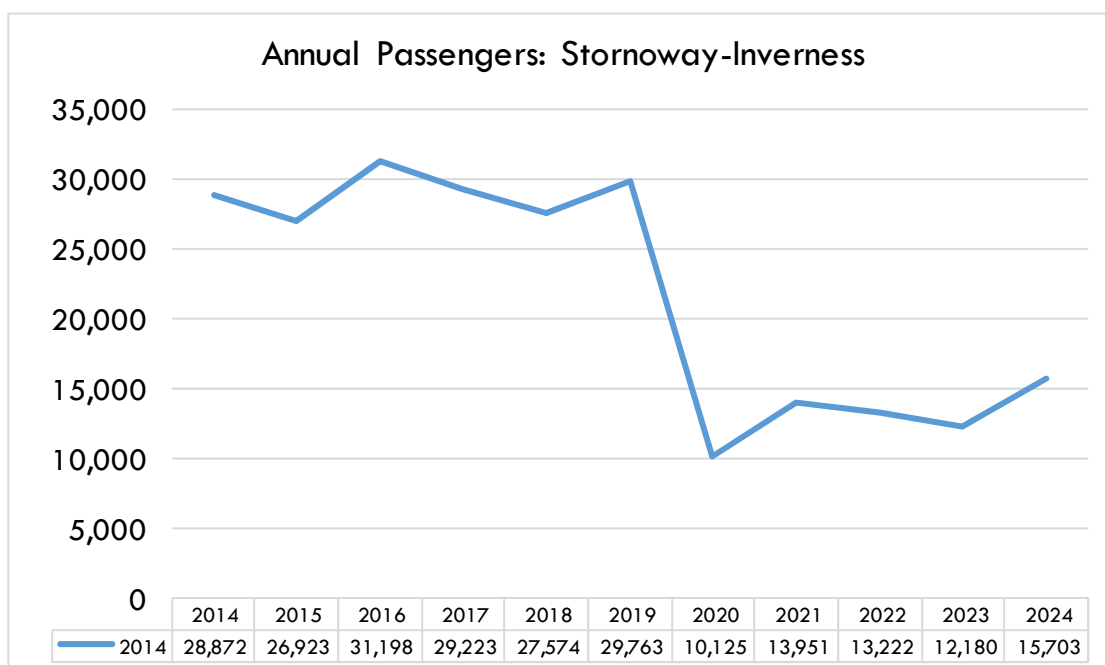
- 2014: 69%.
- 2019: 77%.

These are much higher than the load factors on the intra-Scotland routes covered in this report.

**By 2019 the service had moved to a single rotation per day and there were some 12% fewer flights than in 2014. However, this appears to have little impact on passenger numbers.**

## 2.3 STORNOWAY-INVERNESS

### 2.3.1 Annual Passenger Numbers



In the years between 2014 and 2019 carryings ranged between around 27,000 passengers in 2015 and 31,000 in 2016.

The numbers fell sharply during the Covid restrictions While the numbers increased to over 15,000 passengers in 2024 this was well below the pre-Covid numbers.

### 2.3.2 Seasonality of Demand

There is limited seasonality of demand. In 2014 and 2019 there was an almost even numbers of passengers between April and September and the other months of the year. In April-September 2024 there was a slightly higher level of annual passengers (55%) than in the rest of the year (45%).

### 2.3.3 Schedule Analysis

Flybe operated the route in 2014 and 2019, with Loganair operating it in 2024. In 2014 the aircraft used were Saab 340 (33 seats) and Fairchild Dornier 328-100 (32 seats). In 2019 it was the Saab alone that operated the route.

By 2024 larger planes were being used on the Stornoway-Inverness route. They were the ATR 72 (72 seats), Embraer RJ145 (49 seats) and ATR 42 (48 seats).

Between 2014 and 2019 the number of seats offered decreased from around 61,000 seats to c53,000 seats; a reduction of around 13%. Between 2019 and 2024 the number of seats offered fell further-to around 52,000-a slight reduction of around 3%.

In 2014 the route was a seven day operation throughout the year. In 2019, there were no Saturday flights during January-March. In 2024 there were no Saturday flights outside of March-October.

In 2014 there were either 3 or 3½ return flights per day during the week and 1 return per day on Saturday and Sunday.

In 2019 there were fewer flights than in 2014. In January-March, there were 3 returns per day on weekdays and one on Sunday. On weekdays there between 2 and 3½ return flights per day, plus one flight per day on Saturday and Sunday.

By 2024 there were no more than 2 returns per day across the year. There were no flights on Saturdays outside of March-October. Between March and October there were mostly 2 return flights Monday-Thursday and 1 return on Friday-Sunday.

In the rest of the year there were 2 returns per day on either three or four days of the week, with 1 return on other days (except Saturday).

The total number of scheduled flights (one way) were:

- 2014: 1,863.
- 2019: 1,617.
- 2024: 1,044.

Estimated annual passenger load factors are:

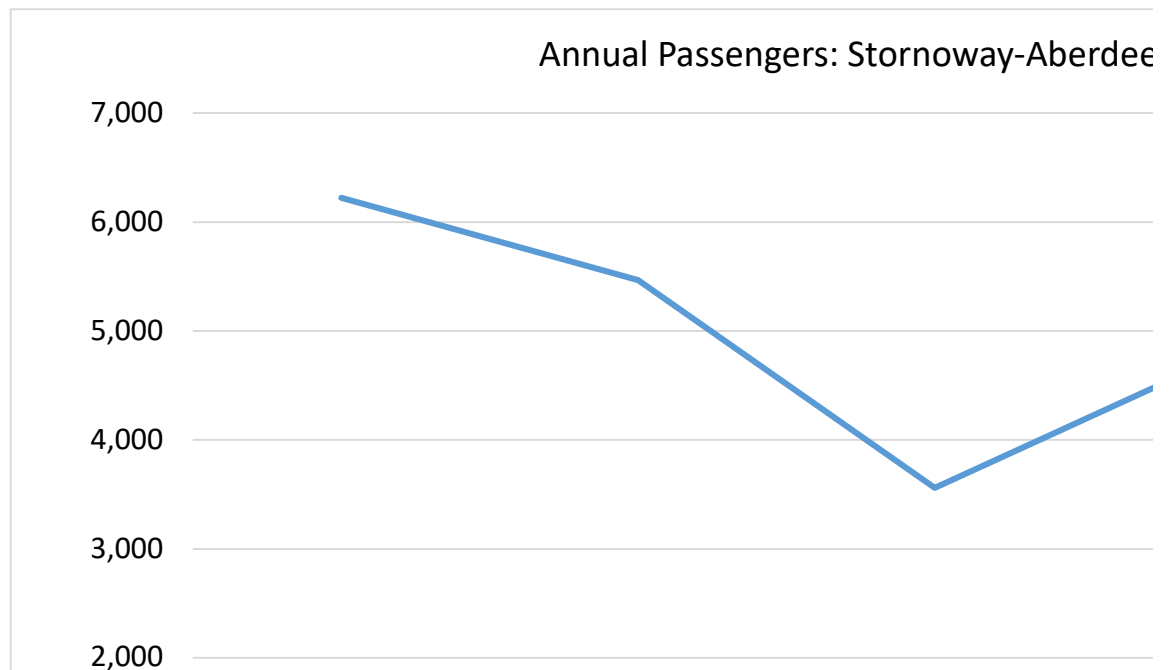
- 2014: 47%.
- 2019: 56%.
- 2024: 30%.

**The changes between 2014 and 2024 resulted in a 15% reduction in the number of seats per annum. However, the impact was also a more than 40% reduction in the number of flights. This will have constrained customer choice and likely have led to some customers using the Ullapool-Stornoway ferry rather than continuing to fly.**

**However, it should also be recognised that some reduction in demand will have come from post-Covid changes in working practices and preferred travel mode.**

## 2.4 STORNOWAY-ABERDEEN

### 2.4.1 Annual Passenger Numbers



In the years between 2014 and 2018, carryings ranged between around 3,600 in 2016 and 6,200 in 2014. The service ceased operation in October 2018.

### 2.4.2 Seasonality of Demand

There was little seasonality of demand in 2014 with almost the same numbers of passengers between April and September and the other months of the year. Traffic was more seasonal in the final year's operation of the service, when the six months between April and September saw 58% of total annual demand.

### 2.4.3 Schedule Analysis

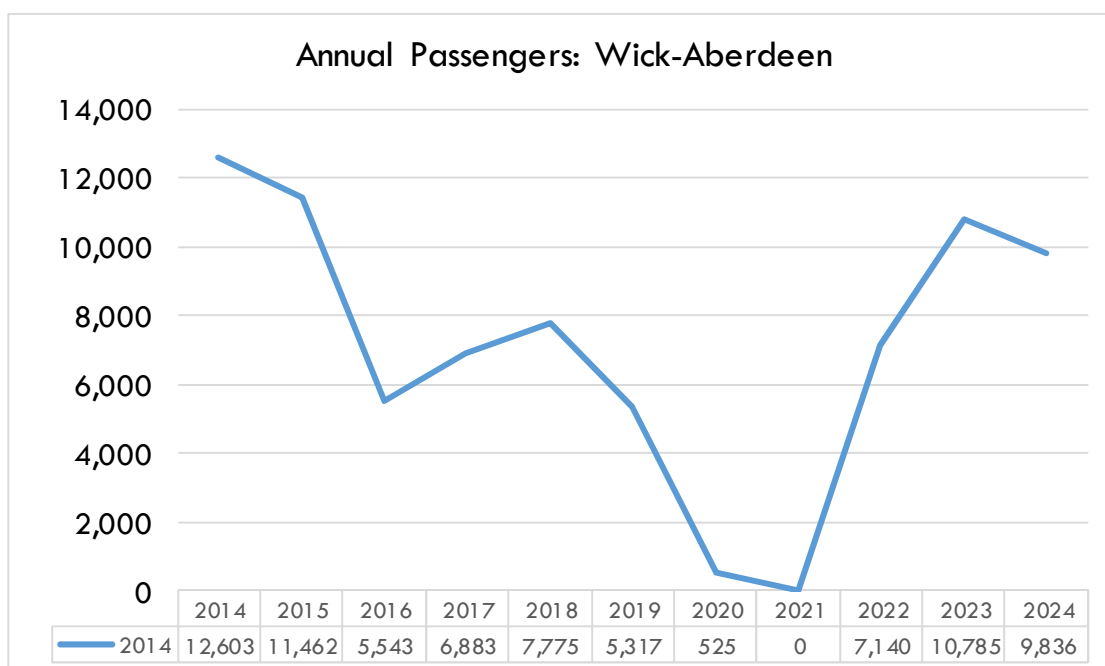
In its first year of operation in 2014 the service was operated by Eastern Airways with a Jetstream 41 aircraft (29 seats) which was the case until the service ceased in 2018.

The service offered slightly above 15,000 seats per annum in 2014. It operated Monday-Friday with 2 return flights per day. In total the service offered 522 one way flights in 2014.

The estimated annual passenger load factor in 2014 was 41%.

## 2.5 WICK-ABERDEEN

### 2.5.1 Annual Passenger Numbers



The highest levels of traffic were in 2014 and 2015, including more than 12,000 passengers carried in 2014. However, demand declined sharply thereafter with carryings in 2019 (at c5,300 passengers) less than half those seen in earlier years.

In the last two years with the service operating as a PSO (Public Service Obligation) service traffic has increased. There were more than 10,000 passengers in 2023 and slightly under 10,000 passengers carried in 2024.

### 2.5.2 Seasonality of Demand

There was little seasonality of demand in 2019 with almost even numbers of passengers between April and September and the other months of the year. In 2024 traffic was slightly more seasonal in 2024 with 54% of annual carryings seen in the six months between April and September.

### 2.5.3 Schedule Analysis

Eastern Airways operated the service in 2014 and 2024. flybe was the operator in 2019. In each of the three years the service was provided by a Bae Jetstream 41 (29 seats).

Between 2014 and 2019 the number of seats offered decreased from around 42,000 seats to c24,000 seats. That was a reduction of more than 40%.

However, the number of seats increased and by 2024 around 30,000 seats were offered (an increase of more than 25% on the 2019 number) although still less than the number of seats offered in 2014.

The route was a five day (Monday to Friday) operation in both 2014 and 2019. In 2014 the frequency was 3 returns per day (Monday-Thursday) and 2 returns per day on Friday. However, by 2019 the frequency of service had decreased with there being 2 returns per day Monday-Thursday, and one return per day on Fridays for most of the year.

In 2024 between January and mid October the route had 2 returns per day on six days of the week, with 1 return flight per day on Sundays. For the rest of the year, Monday and Friday had 2 return flights per day with other days of the week (apart from Saturday) having 1 return flight per day.

The total number of scheduled flights (one way) were:

- 2014: 1,462.
- 2019: 830.
- 2024: 1,048.

Estimated annual passenger load factors are:

- 2014: 30%.
- 2019: 22%.
- 2024: 32%.

**The number of flights fell by more than 40% between 2014 and 2019, and then increased by 25% by 2024. The impact was due to a reduction in the number of flights as the Jetstream 41 was used throughout the years between 2014 and 2024 (a 28% reduction in the number of flights).**

## 2.6 WICK-EDINBURGH

### 2.6.1 Annual Passenger Numbers



Between 2014 and 2017 passenger numbers were broadly steady, between around 10,700 in 2014 and 11,600 in 2017. Thereafter they declined to c9,300 passengers in 2018 and c7,400 in 2019. The service ceased operation in 2020.

### 2.6.2 Seasonality of Demand

The data for 2014 and 2019 show slightly more traffic in the April-September period than in the other six months of the year.

### 2.6.3 Schedule Analysis

In 2014 the service was operated by flybe. They used a mix of Saab 340 (33 seats), Fairchild Dornier 328-100 (31 seats) and Saab 2000 (50 seats), although it was very largely the Fairchild Dornier that operated the flights. In total c21,400 seats were offered.

The timetable operated on six days, with no flights on Saturday. There was 1 return per day Monday-Thursday, and sometimes 2 flights per day on Friday with a Saab 340 or a single return flight by the Saab 2000.

In 2019 the service was operated by Loganair entirely by a Saab 340 (33 seats). Some 18,400 seats were offered. That is, around 3,000 (14%) less than in 2014.

One return flight per day was operated on either six days of the week (with Saturday omitted) or five days of the week (Tuesday and Saturday omitted).

The total number of scheduled flights (one way) were:

- 2014: 660.

- 2019: 558.

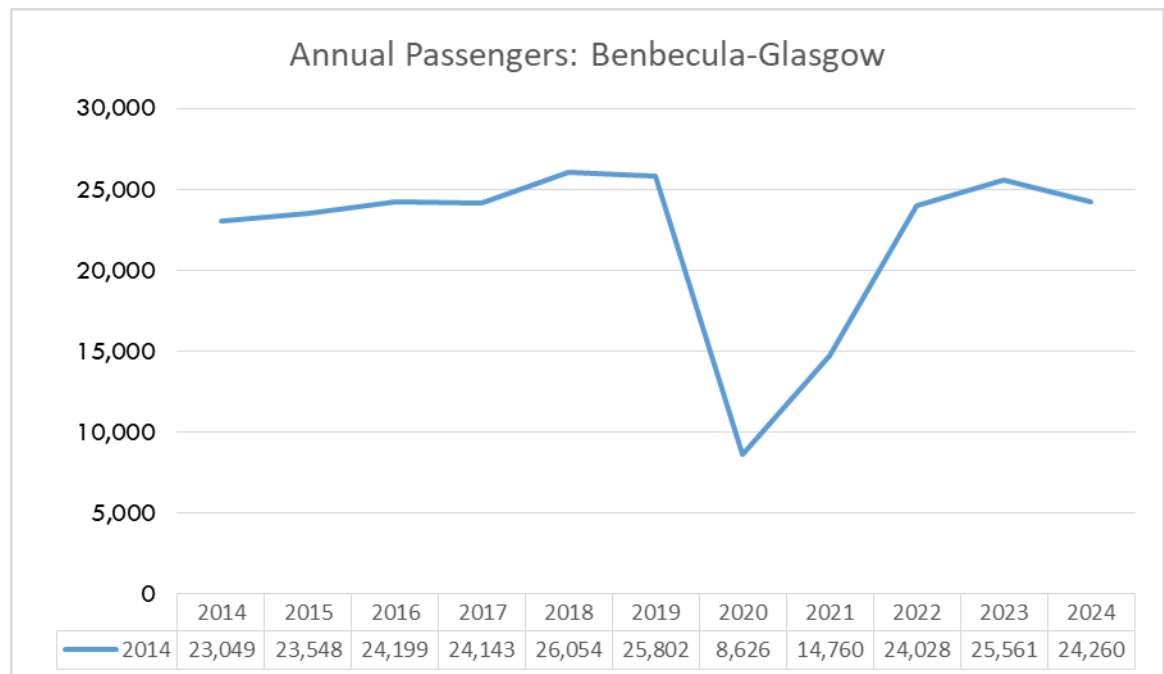
Estimated annual passenger load factors are:

- 2014: 50%.
- 2019: 40%.

**The decrease of 15% in the number of flights between 2014 and 2019 reflects, in part, the ending of two return flights on some Fridays that occurred in 2014. However, it appears that other factors may have led the reduction in demand from around 11,600 passengers in 2016 to c7,400 passengers in 2019.**

## 2.7 BENBECULA-GLASGOW

### 2.7.1 Annual Passenger Numbers



Apart from during Covid times passenger numbers on Benbecula-Glasgow have remained very steady: between around 23,000 passengers in 2014 and just over 26,000 in 2018. The average numbers both pre-Covid and post Covid were very similar at around 24,500 per annum.

### 2.7.2 Seasonality of Demand

The data show more demand in the April-September period than in the rest of the year. In each of the three years (2014, 2019, 2024) that period accounted for between 54% and 56% of total annual passenger numbers.

### 2.7.3 Schedule Analysis

In **2014** the service was operated by flybe. They used a mix of Saab 340 (34 seats) and Fairchild Dornier 328-100 (31 seats). However, the Saab dominated with more than 95% of the seats (c36,000) operated by that aircraft.

The timetable operated on seven days, with one return flight on both Saturdays and Sundays. There were two return flights on Monday and Friday throughout the year. On Tuesday, Wednesday and Thursday, two return flights operated through most of the summer months.

The number of seats available ranged from around 2,400 in February and 3,600 in July.

In **2019** the service was operated by Loganair. The number of seats available had increased to approaching 40,000, a rise of around 10% on the 2014 figure. The flights were operated by a mix of Saab 340 and the Embraer RJ145 which has 49 seats. The Saab aircraft accounted for most (80%) of the seats that were offered.

The number of flights operated by day of the week were very similar to those in the 2014 schedule, while the total number of seats being offered were quite similar to 2014 levels.

In **2024** a much higher number of seats (more than 50,000) were offered. In part that reflected that the aircraft on the route had 48 seats or more following the withdrawal of the Saab aircraft from the route.

The Embraer RJ145 accounted for 60% of the seats and most of the remainder were from the ATR42/ATR72 aircraft (48 seats).

The number of seats offered in 2024 peaked at around 5,500 in July.

The 2024 schedule was similar to that in 2019, although only one rotation per day was operated between January and March.

The total number of scheduled flights (one way) were as follows:

- 2014: 1,076.
- 2019: 1,110.
- 2024: 1,018.

The numbers in each are quite similar.

Estimated annual passenger load factors are:

- 2014: 64%.
- 2019: 65%
- 2024: 47%.

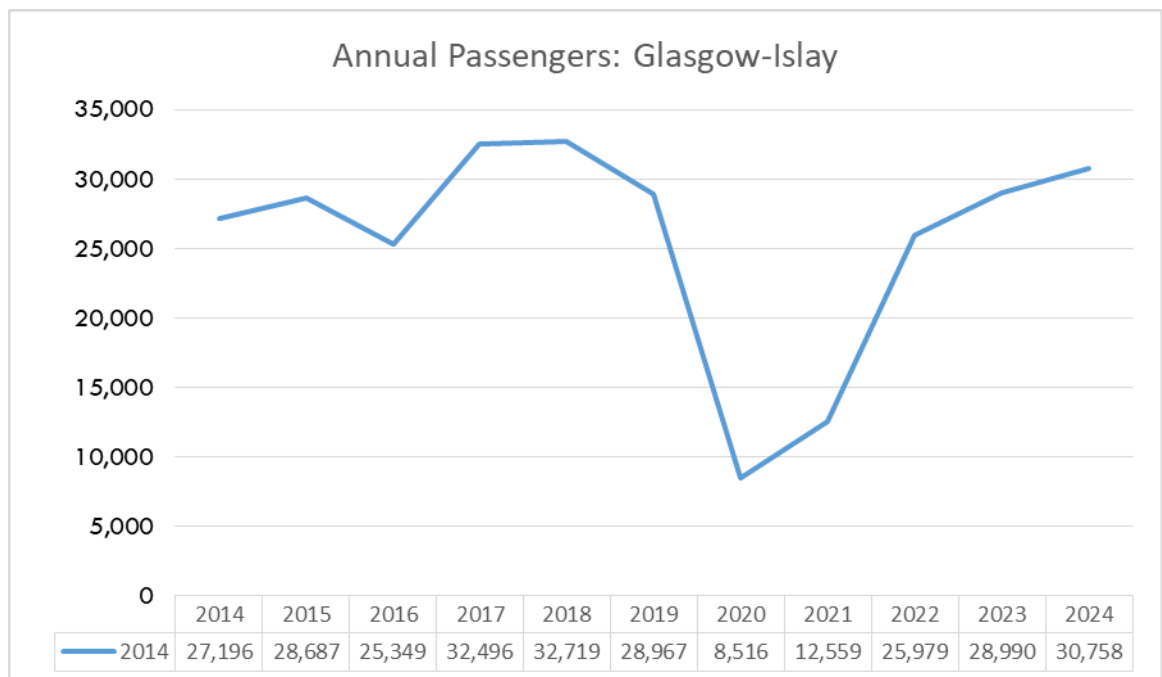
The lower load factor in 2024 very largely reflects the larger ATR 42/ATR72 coming on the route in place of the Saab 340.

**The number of flights have stayed at similar levels across the three sample years (2014, 2019 and 2024), as have the carryings, while the passenger capacities of the planes used have increased.**



## 2.8 GLASGOW-ISLAY

### 2.8.1 Annual Passenger Numbers



Between 2014 and 2019 passenger numbers ranged between 25,000 and approaching 33,000 per year. The carryings rebounded quite rapidly post-Covid and by 2024 were some of the highest seen (more than 30,000) in the whole period. Passenger numbers in 2024 were more than 10% higher than in 2014.

### 2.8.2 Seasonality of Demand

The data show more demand in the April-September period than in the rest of the year. In 2014 and 2019 some 58% of passengers travelled during that period, with the share increasing to 61% in 2024.

### 2.8.3 Schedule Analysis

In **2014** the service was operated by flybe. They used only the Saab 340 (33 seats) and around 42,000 seats were offered in the schedule.

Flights were daily, with one return flight on both Saturdays and Sundays, and two return flights Monday-Friday.

The number of seats available ranged from around 3,300 in February and 3,700 in July.

By **2019**, Loganair were the operator. The number of seats available increased to just over 44,000, a rise of around 5% on the 2014 figure. The flights were operated almost wholly by Saab 340 aircraft, along with around 200 flights by a DHC Twin Otter.

The number of flights operated by day of the week were quite similar to those in the 2014 schedule. The highest frequencies were in the months between May and August. In addition some Sundays saw two rather than a single return flight.

In **2024** a much higher number of seats (more than 63,000-an increase of more than 40%) was offered. In part that reflected that the other aircraft on the route had 48 seats or more following the withdrawal of the Saab aircraft (which had 33 seats).

The 2024 schedule was similar to that in 2019, although only one rotation per day was operated between January and March. Thus the increase in the number of seats offered was a result of larger aircraft on the route rather than a significant increase in the number of flights being operated.

The total number of scheduled flights (one way) were as follows:

- 2014: 1,242.
- 2019: 1,342.
- 2024: 1,215.

Thus, the numbers in each year are somewhat similar.

Estimated annual passenger load factors are:

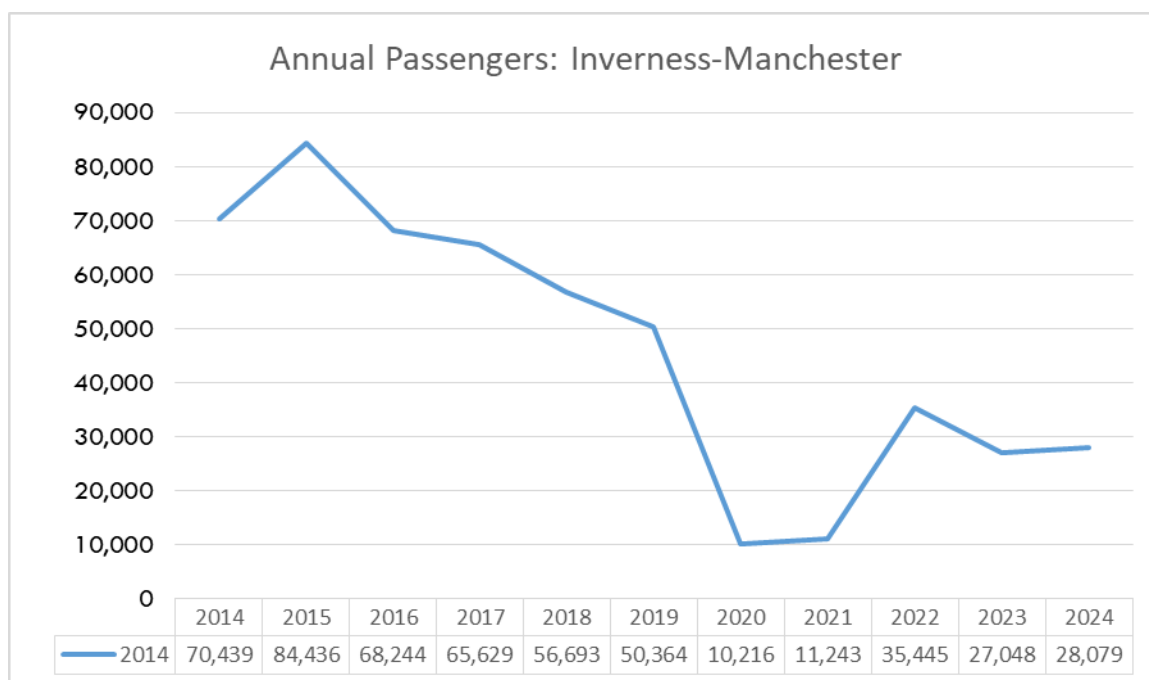
- 2014: 65%.
- 2019: 66%.
- 2024: 48%.

The much lower load factor in 2024 very largely reflects the larger ATR 42/ATR72 aircraft coming on the route in place of the Saab 340.

**The number of flights have stayed at broadly similar levels across the three sample years (2014, 2019 and 2024). However, carryings have increased post Covid with 2024 seeing more than 30,000 passengers. The load factor on the route in 2024 is much lower than in earlier years. This reflects the replacement of the Saab 340 with larger aircraft.**

## 2.9 INVERNESS-MANCHESTER

### 2.9.1 Annual Passenger Numbers



Numbers on this route peaked at more than 84,000 in 2015. Thereafter, carryings fell each year to just over 50,000 passengers by 2019—a fall of 40% since four years earlier.

Traffic recovered post-Covid but only to a limited extent. In the last two years the carryings were between 27,000-28,000 passengers.

### 2.9.2 Seasonality of Demand

The data show more demand in the April-September period than in the rest of the year. The shares of those months have increased over time: from 52% in 2014, 54% in 2019 and 58% in the latest year (i.e. 2024).

### 2.9.3 Schedule Analysis

In **2014** the service was operated by flybe. They used a mix of DHvilld-Bombardier DHC8 Dsh 8-400/8Q (78 seats) and Embraer 175 (88 seats), providing a daily service. Around 112,000 seats were offered.

At least 2 return flights were operated daily Monday-Friday, with an equivalent average of 1.5 return flights operated on Saturday and Sunday.

The number of seats provided ranged from around 7,200 in January to 13,400 in November.

By **2019** Loganair were operating the service. That was with smaller aircraft than used by the previous operator in 2014, very likely reflecting the lower number of passengers using the service.

The aircraft were Embraer RJ135 (37 seats), Embraer RJ145 (49 seats) and Saab 2000 (50 seats).

The number of flights operated were above those seen in 2014. However, their lower capacity meant around 84,000 seats were offered (some 25% below the number seen in 2014). The vast majority (c85%) of seats offered were by the Embraer RJ145.

However, frequencies were greater than in 2014. They had an equivalent average of between 2.6 and 2.8 return flights per day on weekdays, with an equivalent average of 2 return flights on Sundays.

The number of seats provided ranged from around 4,700 in February to 8,200 in October.

By **2024**, the number of seats offered had fallen further, to just under 45,000: a more than 45% drop compared to 2019.

Three aircraft types were used on the route. Embraer RJ145, ATR42 /ATR72 (48 seats) and ATR72 (72 seats). Most (around three quarters) of the seats were those flown by the ATR42 /ATR72, with very few provided by the ATR72.

The number of seats provided ranged from around 2,800 in February to 4,500 in October.

The number of flights operated by day of the week were quite similar to those in the 2014 schedule, with the highest frequencies in the months between May and August. In addition some Sundays saw two rather than one return flight.

The frequency of flights were lower than in both 2014 and 2019. For four months of the year only 1 return flight per day operated. Between April and July two return flights per day operated on Mondays and Fridays, with a single rotation on the other days of the week. Between August and November two return flights operated on each of Tuesday, Thursday, Friday and Sunday.

The total number of scheduled flights (one way) were as follows:

- 2014: 1,403.
- 2019: 1,776.
- 2024: 928.

The numbers show an increase of around 20% in flight numbers between 2014 and 2019. However, by 2024 the number of flights fell to around 50% of the number operated in 2019.

Estimated annual passenger load factors are:

- 2014: 63%.
- 2019: 60%.
- 2024: 62%.

**This shows that the amount of capacity on the route has been reduced as demand has fallen such that the load factors in each of the three years are very similar (i.e. around 60%).**

## **APPENDIX**

**Benbecula-Stornoway**

|                                      | <b>2014</b>                                    | <b>2019</b>                                    | <b>2024</b>   |
|--------------------------------------|--|--|---|
| Operator                             | Flybe  | Loganair                                       | Loganair<br>Hebridean Air   |
| Aircraft Type                        | Saab 340                                       | Saab 340                                       | Loganair:<br>ATR42/ATR 72<br>Embraer RJ145<br>Hebridean Air:<br>Britten Norman Islander   |
| Aircraft Seats                       | 33   | 33   | ATR42/ATR 72<br>(48 seats)<br>Embraer RJ145<br>(49 seats)<br>Hebridean Air:<br>(9 seats)  |
| Annual Number of Seats               | 20,196   | 26,288   | 6,064<br>Loganair:<br>ATR42/ATR 72: 3,648<br>Embraer RJ145: 1,372<br>Hebridean Air: 1,044 |
| Monthly Variation in Number of Seats | 1,584 (Jan, Feb, Mar, Aug, Dec) to 1,980 (Jul) | 1,914 (Dec) to 2,508 (Oct)                     | 72 (Oct) to 1,737 (Feb)   |
| Days of Operation                    | Tue, Wed, Thu                                  | Mon-Fri  | Loganair: Tue and Thu:<br>Hebridean Air: Mon, Tue, and Thu or Fri                         |
| Flight Frequency                     | 2 return flights                               | Mon, Fri: 1 return<br>Tue, Wed, Thu: 2 returns | Loganair: 2 returns per day<br>Hebridean Air: 2 returns per day                           |

**Inverness-Birmingham**

|   | <b>2014</b>  | <b>2019</b>  | <b>2024</b> |
|---|--|--|-------------|
| Operator                                      | Flybe  | Flybe  |             |
| Aircraft Type                                 | Bombardier DHC8<br>(78 seats)<br>Embraer 175<br>(88 seats)   | Bombardier DHC8<br>(78 seats)<br>Embraer 175<br>(88 seats)   |             |
| Annual Number<br>of Seats                     | 59,772<br>Bombardier DHC8<br>44,460<br>Embraer 175<br>15,312   | 51,568<br>Bombardier DHC8<br>48,048<br>Embraer 175<br>3,520  |             |
| Monthly<br>Variation in<br>Number of<br>Seats | 3,432 (Dec) to 8,212<br>(Aug)  | 2,988 (Nov) to 4,836<br>(Mar, May, Jul, Aug,<br>Nov)   |             |
| Days of<br>Operation                          | Jan 5 days per week<br>Feb and Mar 6 days<br>per week<br>Apr-Oct 7 days<br>November and<br>December 6 days per<br>week                                       | Jan, to mid Feb 5 days<br>per week<br>Mid Feb to end of<br>October 7 days<br>November and<br>December 6 days per<br>week |             |
| Flight Frequency                              | 1 return per day Jan-<br>mid July, early<br>September to end of<br>December<br>2 returns per day mid-<br>July-first week in<br>September (mostly<br>Mon-Fri) | 1 return per day   |             |



**Stornoway-Inverness**

|                                      | <b>2014</b>  | <b>2019</b>   | <b>2024</b>   |
|--------------------------------------|--|---|---|
| Operator                             | Flybe  | Flybe   | Loganair  |
| Aircraft Type                        | Saab 340 (33 seats)<br>Fairchild Dornier 328-100 (32 seats)                                    | Saab 340 (33 seats)   | ATR 72 (72 seats)<br>ATR 42 (48 seats)<br>Embraer RJ145 (49 seats)  |
| Annual Number of Seats               | 61,231<br>Saab 340 (54,846)<br>Fairchild Dornier 328 (6,385)                                   | 53,361<br>Saab 340  | 52,004<br>ATR 72 (4,464)<br>ATR 42 (27,744)<br>Embraer RJ145 (19,796)   |
| Monthly Variation in Number of Seats | 4,736 (Dec) to 5,521 (Oct)   | 3,762 (Dec) to 4,851 (Oct)  | 3,766 (Dec) to 5,038 (Oct)  |
| Days of Operation                    | Mon-Sun  | Jan-Mar Mon-Fri, Sun<br>Apr-Dec 7 days  | Jan-Feb: Mon-Fri, Sun<br>Mar-Oct: 7 days<br>Nov-Dec: Mon-Fri, Sun   |
| Flight Frequency                     | Mon and Fri 3 returns per day<br>Tue, Wed, Thu 3½ returns per day<br>Sat, Sun 1 return per day | Jan-Mar Mon-Fri 3 returns per day, Sun 1 per day<br>April-Dec mostly Mon 2½ returns<br>Tue, Wed 3 returns<br>Thu 3½ returns<br>Fri 2 returns<br>Sat, Sun 1 return | Jan-Feb: Tue, Wed, Thu: 2 returns per day.<br>Mon, Fri, Sun; 1 return per day<br>Mar-Oct: mostly Mon-Thu: 2 returns and Fri-Sun 1 return<br>Nov, Dec: Mon-Thu 2 returns, Fri and Sun 1 return |

**Stornoway-Aberdeen**

|                                      | <b>2014</b>                               | <b>2019</b> | <b>2024</b> |
|--------------------------------------|---|-------------|-------------|
| Operator                             | Eastern Airways                           |             |             |
| Aircraft Type                        | Jetstream 41 (29 seats)                   |             |             |
| Annual Number of Seats               | 15,138                                    |             |             |
| Monthly Variation in Number of Seats | 1,160 (Feb) to 1,334 (Jan, Jul, Oct, Dec) |             |             |
| Days of Operation                    | Monday-Friday                             |             |             |
| Flight Frequency                     | 2 returns per day                         |             |             |

**Wick-Aberdeen**

|                                      | <b>2014</b>   | <b>2019</b>  | <b>2024</b>   |
|--------------------------------------|---|--|---|
| Operator                             | Eastern Airways                                     | flybe  | Eastern Airways   |
| Aircraft Type                        | Bae Jetstream 41<br>(29 seats)                      | Bae Jetstream 41<br>(29 seats)   | Bae Jetstream 41<br>(29 seats)  |
| Annual Number of Seats               | 42,398  | 24,070   | 30,392  |
| Monthly Variation in Number of Seats | 3,248 (Feb, Nov) to 3,770 (Jul, Dec)                | 1,044 (Dec) to 2,262 (Jul, Oct)  | 1,682 (Dec) to 2,900 (May, Jul)   |
| Days of Operation                    | Monday-Friday                                       | Monday-Friday  | Jan-mid Oct: 7 days<br>Mid Oct-Dec: 6 days  |
| Flight Frequency                     | Mon-Thu: 3 returns per day<br>Fri 2 returns per day | Mon-Thu: 2 returns per day<br>Fri: 1 returns per day (Jan-to early Nov)<br>Mon-Fri: 1 return per day (early Nov and Dec) | Jan-mid Oct: Mon-Sat 2 returns per day, Sun 1 per day<br>Mid Oct-Dec: Mon, Fri 2 returns per day<br>Tue, Wed, Thu, Sun 1 return per day |

**Wick-Edinburgh**

|                                      | <b>2014</b>   | <b>2019</b>                              | <b>2024</b> |
|--------------------------------------|---|--|-------------|
| Operator                             | Flybe   | Loganair                                 |             |
| Aircraft Type                        | Saab 340 (33 seats)<br>Fairchild Dornier 328-100 (32 seats)<br>Saab 2000 (50 seats)         | Saab 340 (33 seats)                      |             |
| Annual Number of Seats               | 21,434<br>Saab 340 (1,466)<br>Fairchild Dornier 328-100 (18,868)<br>Saab 2000 (1,100 seats) | 18,442                                   |             |
| Monthly Variation in Number of Seats | 1,560 (Nov) to 2,036 (Jul)  | 1,320 (February) to 1,782 (May)          |             |
| Days of Operation                    | Mon-Fri, Sun  | Either Mon-Fri, Sun or Mon, Wed-Fri, Sun |             |
| Flight Frequency                     | Mon-Thu: 1 return<br>Fri: either 2 returns by Saab 340, or 1 return by Saab 2000            | 1 return per day                         |             |

### **Benbecula-Glasgow**

|   | <b>2014</b>   | <b>2019</b>   | <b>2024</b>   |
|---|---|---|---|
| Operator                                | Flybe   | Loganair  | Loganair  |
| Aircraft Type                           | Saab 340<br>(34 seats)<br>Fairchild Dornier<br>328-100 (31 seats)   | Saab 340<br>(33 or 34 seats)<br>Embraer RJ145<br>(49 seats)   | Embraer RJ145<br>(49 seats)<br>ATR42 /ATR72<br>(48 seats)<br>ATR 72<br>(72 seats)   |
| Annual Number of Seats                  | 36,276<br>Saab 340 (35,532)<br>Fairchild Dornier<br>328-100 (744)   | 39,750<br>Saab 340 (32,008)<br>Embraer RJ145<br>(7,742)   | 51,172<br>Embraer RJ145<br>(30,772)<br>ATR42 /ATR72<br>(15,360)<br>ATR 72<br>(5,040)  |
| Monthly Variation in<br>Number of Seats | 2,424 (Feb) to<br>3,638 (Jul)   | 2,244 (Feb) to<br>3,918 (Jul)   | 2,905 (Jan) to<br>5,486 (Jul)   |
| Days of Operation                       | Mon-Sun   | Mon-Sun   | Mon-Sun   |
| Flight Frequency                        | <b>Mon, Fri:</b> 2 returns<br><b>Tue, Wed:</b> 1 return,<br>except 2 returns<br>May-Sep<br><b>Thu:</b> 1 return<br>except 2 returns<br>Apr-Oct<br><b>Sat, Sun:</b> 1 return | <b>Mon, Fri:</b> 2 returns<br><b>Tue, Wed:</b> 1 return,<br>except 2 returns<br>Apr-Oct<br><b>Thu:</b> 1 return<br>except 2 returns<br>Mar-Oct<br><b>Sat, Sun:</b> 1 return | <b>Mon, Fri</b> 2 returns:<br>Apr-Dec<br>1 return Jan-Mar<br><b>Tue, Wed, Thu:</b><br>1 return Mid Oct to<br>Dec, and Jan-Mar,<br>April or May<br>2 returns April or<br>May to mid Oct<br><b>Sat, Sun:</b> 1 return |

**Glasgow-Islay**

|                                      | <b>2014</b>                              | <b>2019</b>  | <b>2024</b>   |
|--------------------------------------|--|--|---|
| Operator                             | Flybe                                    | Loganair   | Loganair  |
| Aircraft Type                        | Saab 340 (33 seats)                      | Saab 340 (33 seats)<br>DHC-6 Twin Otter (19 seats)   | ATR42 /ATR72 (48 seats)<br>ATR 72 (72 seats)                  |
| Annual Number_of Seats               | 41,988                                   | 44,182<br>Saab 340 (43,954)<br>DHC-6 Twin Otter (228)  | 63,432<br>ATR42 /ATR72 (48,096)<br>ATR 72 (15,336)            |
| Monthly Variation in Number of Seats | 3,264 (Feb) to 3,717 (May)               | 3,084 (Feb) to 4,422 (May, Jul)  | 4,032 (Apr) to 6,864 (Oct)                                    |
| Days of Operation                    | Monday-Sunday                            | Monday-Sunday  | Monday-Sunday   |
| Flight Frequency                     | Mon-Fri: 2 returns<br>Sat, Sun: 1 return | Mon-Fri: c2 returns,<br>Mon and Fri have highest numbers of flights, and the highest frequencies are in May-Aug<br>Sat: 1 return flight<br>Sun: between 1 and 2 return flights | Mon-Fri: c2 returns<br>Sat-Sun slightly above 1 return flight |

### Inverness-Manchester

|                                      | <b>2014</b>   | <b>2019</b>   | <b>2024</b>  |
|--------------------------------------|---|---|--|
| Operator                             | Flybe   | Loganair  | Loganair   |
| Aircraft Type                        | DHvilld-Bombardier<br>DHC8 Dsh 8-400/8Q<br>(78 seats)<br>Embraer 175<br>(88 seats)  | Embraer RJ135<br>(37 seats)<br>Embraer RJ145<br>(49 seats)<br>Saab 2000<br>(50 seats)   | Embraer RJ145<br>(49 seats)<br>ATR42 /ATR72<br>(48 seats)<br>ATR72<br>(72 seats)   |
| Annual Number of Seats               | 112,274<br>DHvilld-Bombardier<br>(87,282)<br>Embraer 175 (24,992)   | 83,948<br>Embraer RJ145<br>(72,128)<br>Embraer RJ135<br>(9,620)<br>Saab 2000<br>(2,200)   | 44,996<br>ATR42 /ATR72<br>(33,888)<br>Embraer RJ145<br>(10,388)<br>ATR72<br>(720)  |
| Monthly Variation in Number of Seats | 7,216 (Jan) to 13,360<br>(Nov)  | 4,738 (Feb) to 8,232<br>(Oct)   | 2,792 (Feb) to 4,534<br>(Oct)  |
| Days of Operation                    | Monday-Sunday   | Monday-Sunday   | Monday-Sunday  |
| Flight Frequency                     | Tue: more than 2 return<br>flights<br>Mon, Wed, Thu, Fri:<br>2 return flights<br>Sat, Sun: equivalent<br>average of 1.5 return<br>flights | Mon-Fri: Between an<br>average of 2.6 and<br>2.8 return flights<br>Sat: average of 1.5<br>return flights<br>Sun: average of 2<br>return flights | <b>Jan-Mar, Dec</b> 1 return<br>flight per day<br><b>Apr-Jul:</b> 2 return flights<br>on Fri and Sun, 1 return<br>on other days<br><b>Aug-Nov:</b> 2 return<br>flights on Tue, Thu, Fri,<br>Sun, 1 return on other<br>days |