





through the development of low-cost services. The two airports are 82 miles apart.

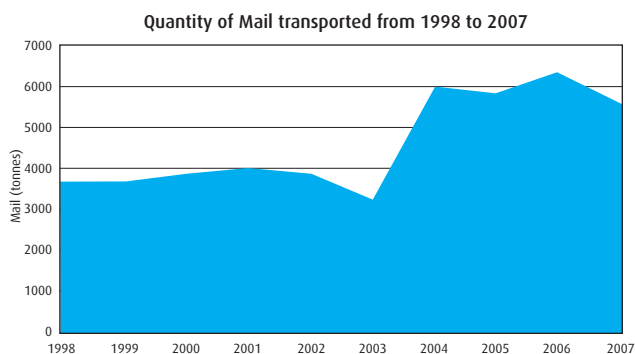
5.17. Southampton Airport's recent growth has, like Exeter International Airport been due to Flybe expansion and serves similar routes to Exeter International Airport. The two airports are 100 miles apart.

5.18. London Heathrow and Gatwick Airports have a substantial influence on Exeter's catchment - particularly for services not flown from regional airports. In 2003, the Airports combined captured more than 40% of traffic originating in Devon and Cornwall.

## Cargo

5.19. With the exception of mail, Exeter International Airport processes little freight as a consequence of its airline mix of charter and low cost operators with fast turn around times that are unsuitable for air cargo. The majority of cargo is in fact road transport bonded goods from Heathrow or Gatwick.

5.20. Mail has seen considerable growth during the past ten years. Royal Mail relies on Exeter International Airport as the key distribution point for South West England. Exeter International Airport is well positioned geographically, provides long opening hours, and advantageous weather. Mail is shipped by road vehicle from Truro, Plymouth and Exeter. Exeter International Airport, with Royal Mail, has provided facilities on site so that mail can be screened [security x-ray machines] before being loaded onto the dedicated Royal Mail aircraft. Mail volumes have increased by more than 70% since 2003 as shown on the graph below:



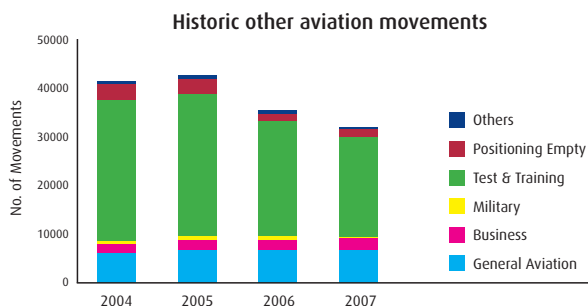
Graph 5.7 – Quantity of Mail transported from 1998 to 2007

## Other Aviation

5.21. In addition to Air Transport Movements for passenger and mail flights there are numerous other aircraft movements including:

- General Aviation;
- Business Aviation;
- Military;
- Test and Training;
- Positioning Empty; and
- Other.

5.22. The table and chart below indicate the numbers of movements in each year since 2004.



Graph 5.8 – Historic other aviation movements

5.23. General Aviation includes flying clubs and privately owned aircraft.

5.24. Business includes Executive aviation, private charters, air taxis and air ambulances.

5.25. Test & Training includes both flight tests by aircraft from the maintenance facilities as well as flight training for both Flybe and the numerous flying schools at the Airport.

5.26. Positioning Empty includes aircraft arriving for maintenance and aircraft arriving or departing empty to operate services or after diversions.

5.27. The small decline in business flights reflects the historic lack of appropriate facilities. Exeter International Airport has recently invested in facilities for Business & Executive Aviation, including a new executive lounge within Building 12. It is forecast that this investment will stimulate further growth and there has been a significant increase in activity since summer 2007.

