

Aviation Trends

Quarter 1 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 data on how departure taxi-times differ at Heathrow, Gatwick and Stansted and how taxi-time incorporation within airlines' schedules affect punctuality metrics.

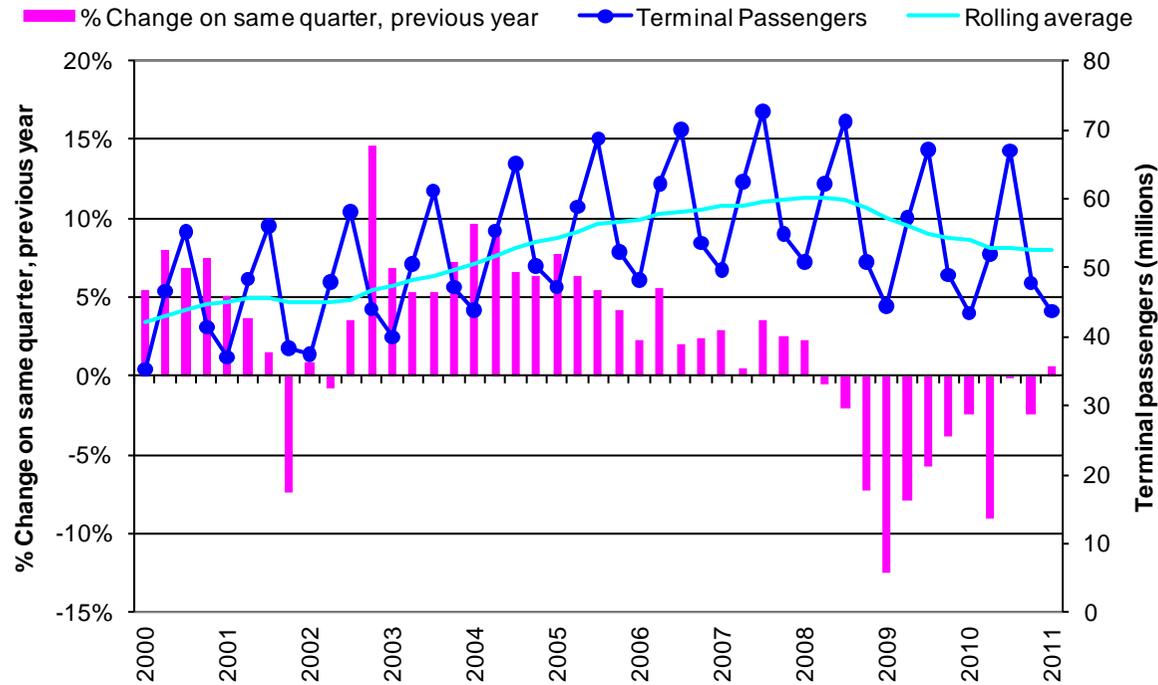
In this edition of aviation trends, we show that the number of passengers, commercial flights and cargo tonnage handled at UK airports increased slightly in quarter 1 2011 compared to the same quarter last year.

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.

For a list of all statistics available on the CAA website, see 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^{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).

Quarter 1 2011 saw a slight increase in passenger numbers (0.6%) compared with the same quarter last year. This was the first year-on-year increase since Quarter 1 2008.

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

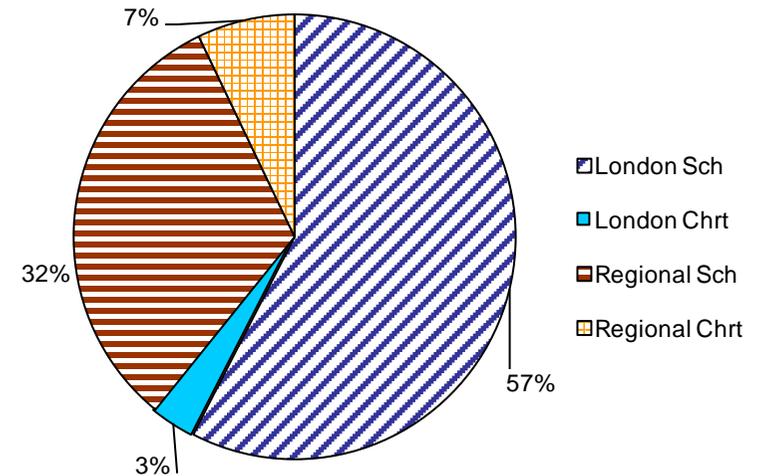
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2011		Q1 2010		+/- %	Q2 10 - Q1 11		Q2 09 - Q1 10		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
London Airports	27.8	64%	27.3	63%	1.8%	130.2	60%	127.6	61%	2.0%
- Scheduled	26.8	62%	26.2	61%	2.2%	122.9	57%	120.8	58%	1.7%
- Charter	1.0	2%	1.1	3%	-9.1%	7.2	3%	6.8	3%	6.3%
Regional Airports	15.7	36%	15.9	37%	-1.5%	85.8	40%	82.2	39%	4.4%
- Scheduled	13.8	32%	13.9	32%	-1.0%	70.1	32%	67.2	32%	4.4%
- Charter	1.9	4%	2.0	5%	-5.1%	15.7	7%	15.0	7%	4.5%
All Airports	43.5	100%	43.3	100%	0.6%	215.9	100%	209.8	100%	2.9%
- Scheduled	40.6	93%	40.1	93%	1.1%	193.0	89%	188.0	90%	2.7%
- Charter	2.9	7%	3.1	7%	-6.6%	22.9	11%	21.8	10%	5.1%

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.

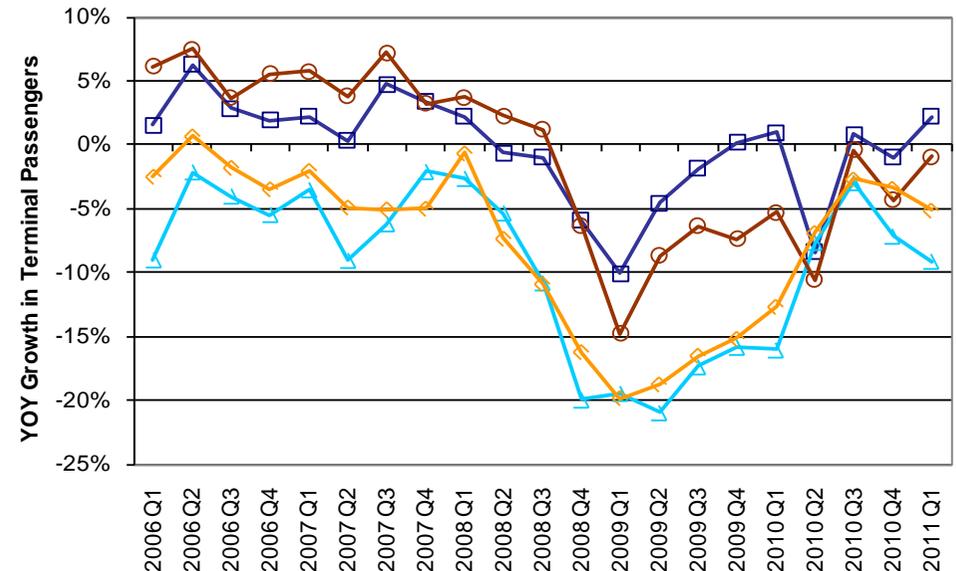
In quarter 1 2011, there were 1.1% more scheduled passengers at all airports compared to quarter 1 last year, while the decline in charter passengers was 6.6%. The number of scheduled passengers at regional airports fell by 1.0%, whereas London airports saw a 2.2% rise. The charter passenger fall was more pronounced at London airports (9.1%) than at regional airports (5.1%).

Passenger Share (year to date)



Legend for YOY Growth in Terminal Passengers:

- London Sch (Blue line with squares)
- London Chrt (Cyan line with triangles)
- Regional Sch (Brown line with circles)
- Regional Chrt (Orange line with diamonds)



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

Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2011		Q1 2010			Q2 10 - Q1 11		Q2 09 - Q1 10		
	Flights	% of total	Flights	% of total	+/- %	Flights	% of total	Flights	% of total	+/- %
London Airports	227.5	53%	220.8	52%	3.0%	947.1	51%	979.1	50%	-3.3%
- Scheduled	221.3	52%	214.5	51%	3.2%	910.6	49%	940.0	48%	-3.1%
- Charter	6.2	1%	6.2	1%	-1.5%	36.4	2%	39.1	2%	-6.7%
Regional Airports	200.8	47%	202.3	48%	-0.7%	917.2	49%	961.6	50%	-4.6%
- Scheduled	188.7	44%	189.7	45%	-0.5%	831.6	45%	872.1	45%	-4.6%
- Charter	12.1	3%	12.6	3%	-4.2%	85.5	5%	89.5	5%	-4.4%
All Airports	428.3	100%	423.1	100%	1.2%	1,864.3	100%	1,940.6	100%	-3.9%
- Scheduled	410.0	96%	404.2	96%	1.5%	1,742.3	93%	1,812.1	93%	-3.9%
- Charter	18.3	4%	18.9	4%	-3.3%	122.0	7%	128.6	7%	-5.1%

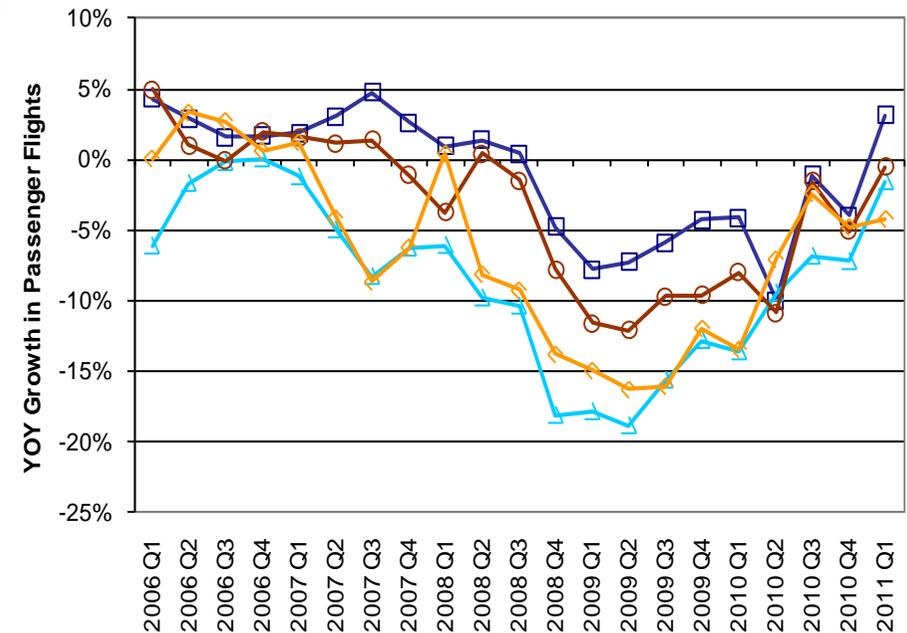
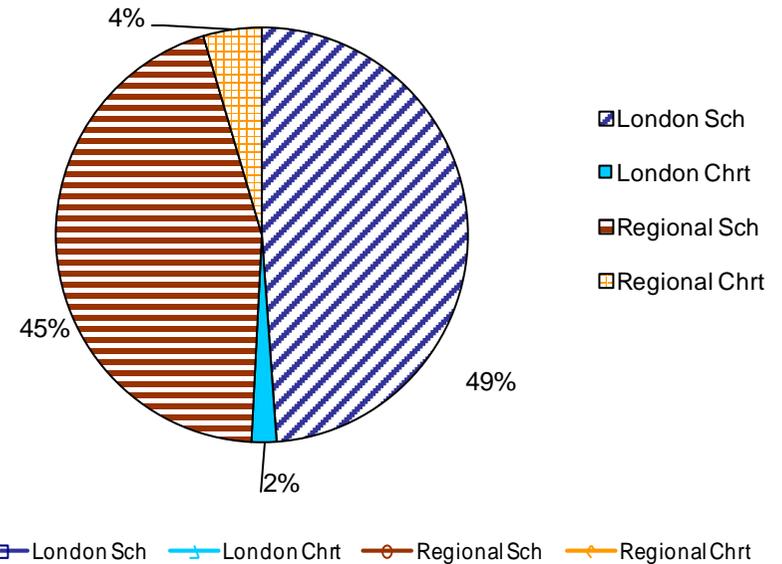
Source: CAA Airport Statistics

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 2011 rose by 1.2% (approximately 5,200) on quarter 1 2010. Rolling year flights fell 3.9%, which represents around 76,400 flights.

In quarter 1 2011, there were 3.0% more flights at London airports and 0.7% less flights at regional airports. But rolling year flights were still down 3.3% and 4.6% at London and regional airports respectively. Scheduled flights were up 1.5% in quarter 1 2011, and charter flight fell by 3.3%.

Flight Share (year to date)

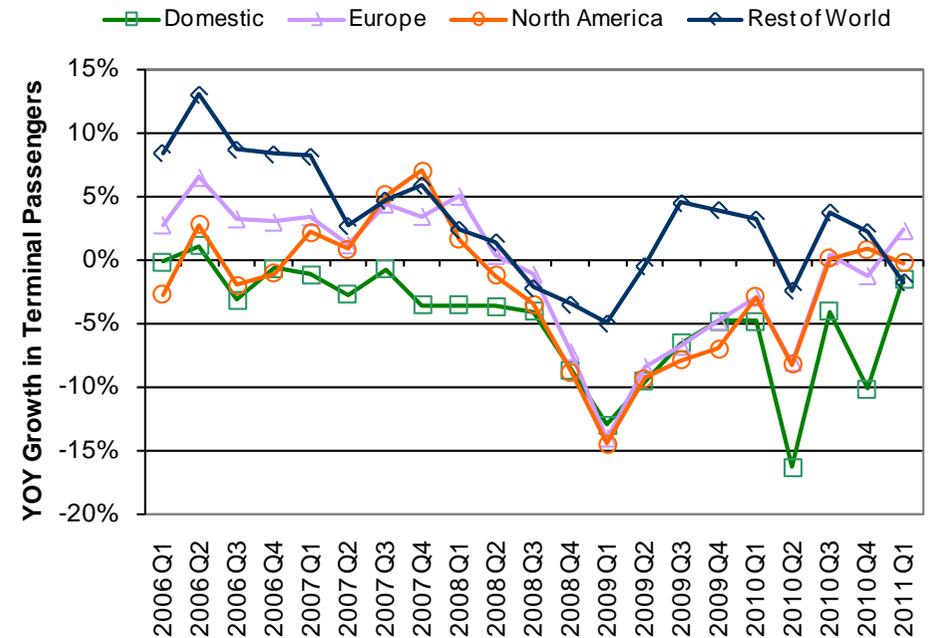
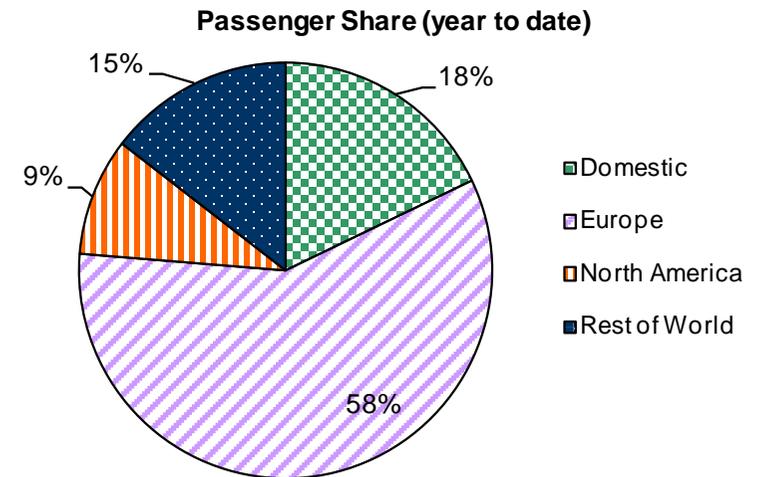


4. Terminal passengers at UK airports by origin / destination^{6,7,8,9,11}

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2011		Q1 2010		+/- %	Q2 10 - Q1 11		Q2 09 - Q1 10		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
Domestic	8.6	20%	8.7	20%	-1.6%	37.5	18%	40.9	19%	-8.3%
- Scheduled	8.5	20%	8.7	20%	-1.7%	37.2	18%	40.6	19%	-8.4%
- Charter	0.1	0.2%	0.1	0.2%	6.2%	0.3	0.2%	0.3	0.2%	4.2%
Europe	23.8	55%	23.2	54%	2.3%	122.5	58%	125.0	58%	-2.0%
- Scheduled	21.7	50%	21.1	49%	2.9%	105.0	50%	106.6	49%	-1.4%
- Charter	2.1	5%	2.1	5%	-4.2%	17.5	8%	18.4	9%	-5.1%
North America	3.7	9%	3.7	9%	-0.3%	19.2	9%	19.6	9%	-2.1%
- Scheduled	3.7	8%	3.7	9%	0.1%	18.8	9%	19.2	9%	-1.9%
- Charter	0.0	0.0%	0.0	0.1%	-47.5%	0.4	0.2%	0.4	0.2%	-13.5%
Rest of World	7.4	17%	7.6	17%	-1.8%	30.5	15%	30.4	14%	0.5%
- Scheduled	6.6	15%	6.7	15%	-0.4%	26.9	13%	26.7	12%	1.0%
- Charter	0.8	2%	0.9	2%	-11.9%	3.6	2%	3.7	2%	-3.1%
Total	43.5	100%	43.3	100%	0.6%	209.8	100%	215.9	100%	-2.8%
- Scheduled	40.6	93%	40.1	93%	1.1%	188.0	90%	193.0	89%	-2.6%
- Charter	2.9	7%	3.1	7%	-6.6%	21.8	10%	22.9	11%	-4.8%

Source: CAA Airport Statistics

In quarter 1 2011, the number of passengers on board domestic flights fell by 1.6% compared with the same quarter last year. There were 0.3% and 1.8% fewer passengers travelling to and from North America and 'Rest of the World' respectively. Travel to and from Europe (which made up 55% of total passengers) showed a 2.3% increase, and this pulled total passenger numbers up by 0.6% compared to quarter 1 2010.



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

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2011		Q1 2010		+/- %	Q2 10 - Q1 11		Q2 09 - Q1 10		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
Cargo on cargo only flights	204.9	33%	204.9	34%	0.0%	840.5	33%	827.1	35%	1.6%
London	81.9	13%	81.4	13%	0.6%	332.5	13%	323.5	14%	2.8%
Regional	123.0	20%	123.4	20%	-0.4%	508.0	20%	503.6	21%	0.9%
Bellyhold cargo	413.3	67%	402.9	66%	2.6%	1,697.7	67%	1,515.7	65%	12.0%
London	390.2	63%	379.0	62%	2.9%	1,597.5	63%	1,427.8	61%	11.9%
Regional	23.1	4%	23.9	4%	-3.3%	100.2	4%	87.9	4%	4.0%
Total cargo	618.2	100%	607.8	100%	1.7%	2,538.3	100%	2,342.8	100%	8.3%
London	472.1	76%	460.5	76%	2.5%	1,930.1	76%	1,751.3	75%	10.2%
Regional	146.1	24%	147.3	24%	-0.8%	608.2	24%	591.5	25%	2.8%

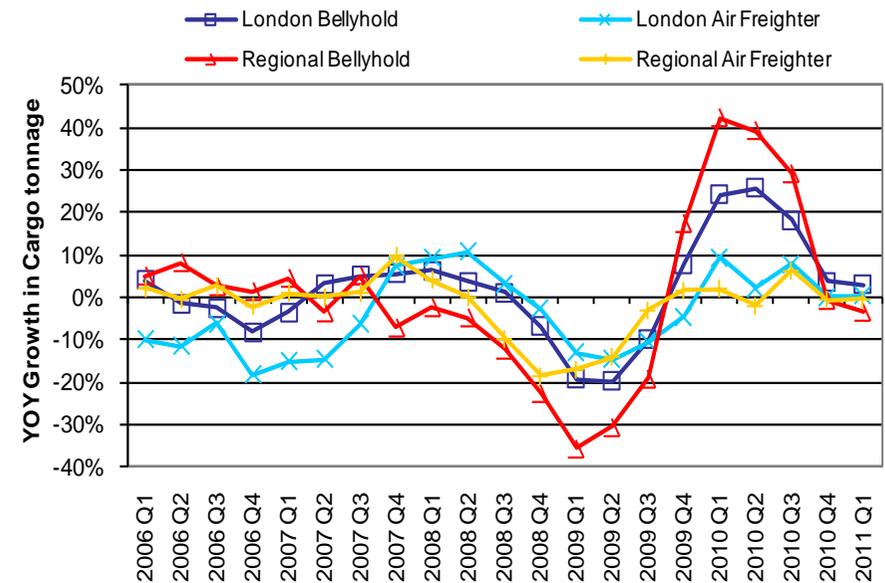
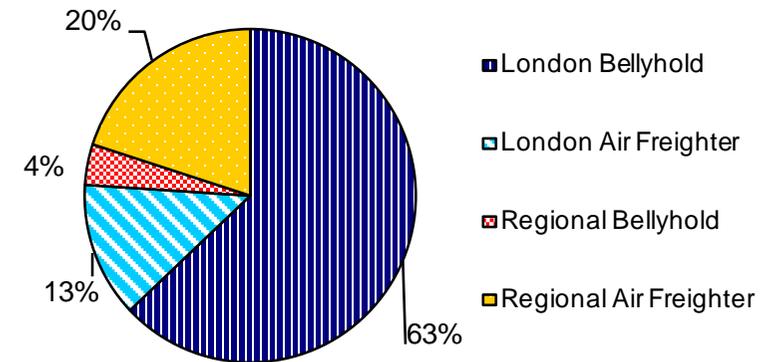
Source: CAA Airport Statistics

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 rose by 1.7% in quarter 1 2011. London airports saw an increase of 2.5% whereas regional airports saw a fall of 0.8%.

Air freighter cargo tonnage saw no change compared with the same quarter last year. Over the same period, bellyhold tonnage increased by 2.6%.

Cargo Share (year to date)



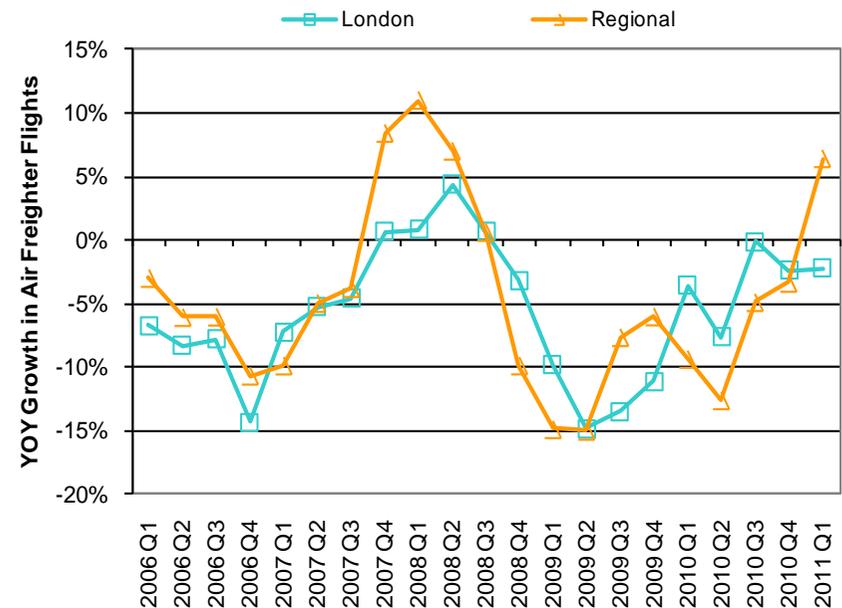
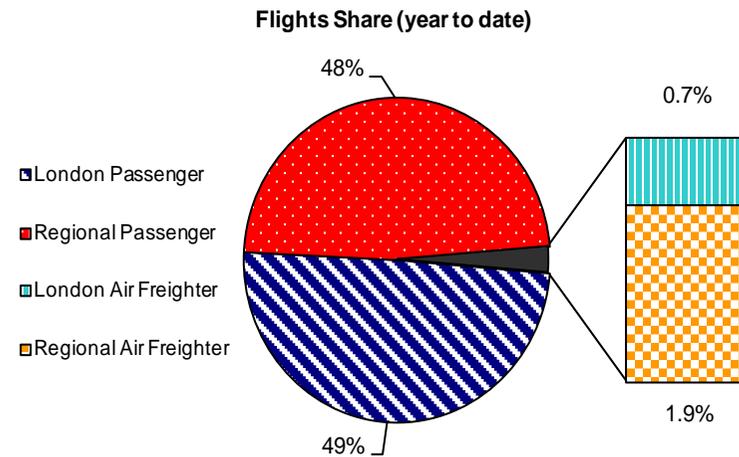
6. All commercial flights to and from UK airports^{5,7,10,11}

Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2011		Q1 2010		+/- %	Q2 10 - Q1 11		Q2 09 - Q1 10		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
Air freighter	12.6	3%	12.1	3%	3.9%	50.0	3%	51.9	3%	-3.6%
London	3.4	1%	3.5	1%	-2.2%	13.8	1%	14.3	1%	-3.1%
Regional	9.2	2%	8.6	2%	6.4%	36.2	2%	37.6	2%	-3.8%
Passenger flights	428.3	97%	423.1	97%	1.2%	1,864.3	97%	1,940.6	97%	-3.9%
London	227.5	52%	220.8	51%	3.0%	947.1	49%	979.1	49%	-3.3%
Regional	200.8	46%	202.3	46%	-0.7%	917.2	48%	961.6	48%	-4.6%
Total flights	440.9	100%	435.2	100%	1.3%	1,914.3	100%	1,992.5	100%	-3.9%
London	230.9	52%	224.3	52%	3.0%	960.9	50%	993.3	50%	-3.3%
Regional	210.0	48%	210.9	48%	-0.4%	953.4	50%	999.2	50%	-4.6%

Source: CAA Airport Statistics

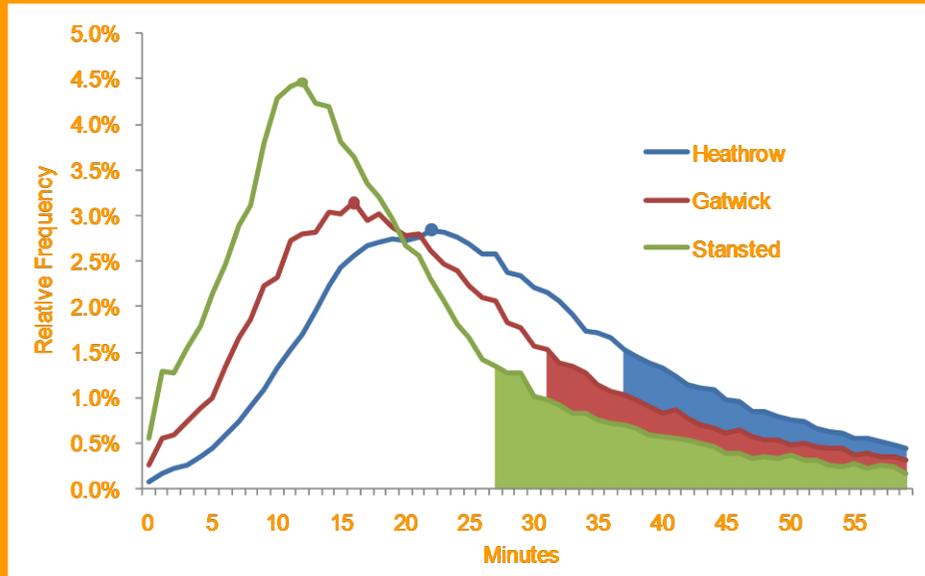
The number of commercial flights at reporting UK airports is a measure of commercial aviation activity in the UK. It includes both passenger and cargo flights, but excludes military flights, general aviation and aircraft that pass through UK airspace without landing.

Total commercial flights in the UK increased by 1.3% in quarter 1 2011 compared to quarter 1 2010. The number of passenger flights saw a smaller increase (1.2%) than that of air freighter flights (3.9%).



Did you know? Departure Taxi-Time estimates at Heathrow, Gatwick and Stansted

Distribution of the time difference between actual take-off time and planned push-back time at Heathrow, Gatwick and Stansted



Source: CAA Airport Stats and ACL

Note: The distribution is shown for one hour only although there were flights outside this interval.

Taxi-time can be defined as the time between push-back from (or arrival at) the gate and take-off from (or landing on) the runway. Taxi-times can vary between airports, times of day or seasons for many different operational reasons.

This graph shows the distribution of the time difference between actual take-off time and planned push-back time¹ at Heathrow, Gatwick and Stansted. During 2010, the mode of this difference for departures (the most frequent difference between actual take-off and planned push-back) was 22 minutes at Heathrow, 16 minutes at Gatwick and 12 minutes at Stansted. This mode can be interpreted as an estimate of the departure taxi-time required, under normal conditions, at each airport.

The expected taxi-time is likely to be built into the airline flight schedule. As a result, even though expected taxi-times affect a passenger's end-to-end journey time, they don't affect flight punctuality performance. The area coloured represents the proportion of flights that departed the gate more than 15 minutes after the planned time, assuming that the mode time-difference for that airport was built into the schedule².

¹ Take-off time as reported by airports to the CAA and planned push-back time taken from ACL (Airport Coordination Ltd) data.

² Every month, the CAA publishes an extensive data-set on punctuality performance, comparing CAA airport statistics take-off/landing times and planned gate times as provided by ACL. To make the two datasets comparable, the CAA uses an assumed taxi-time estimated using a similar methodology to that described above. For accessing CAA punctuality statistics and for more information on the methodology please see www.caa.co.uk/punctuality.

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.