

Aviation Trends

Quarter 4 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 compare the current state of the aviation industry to that in 1973.

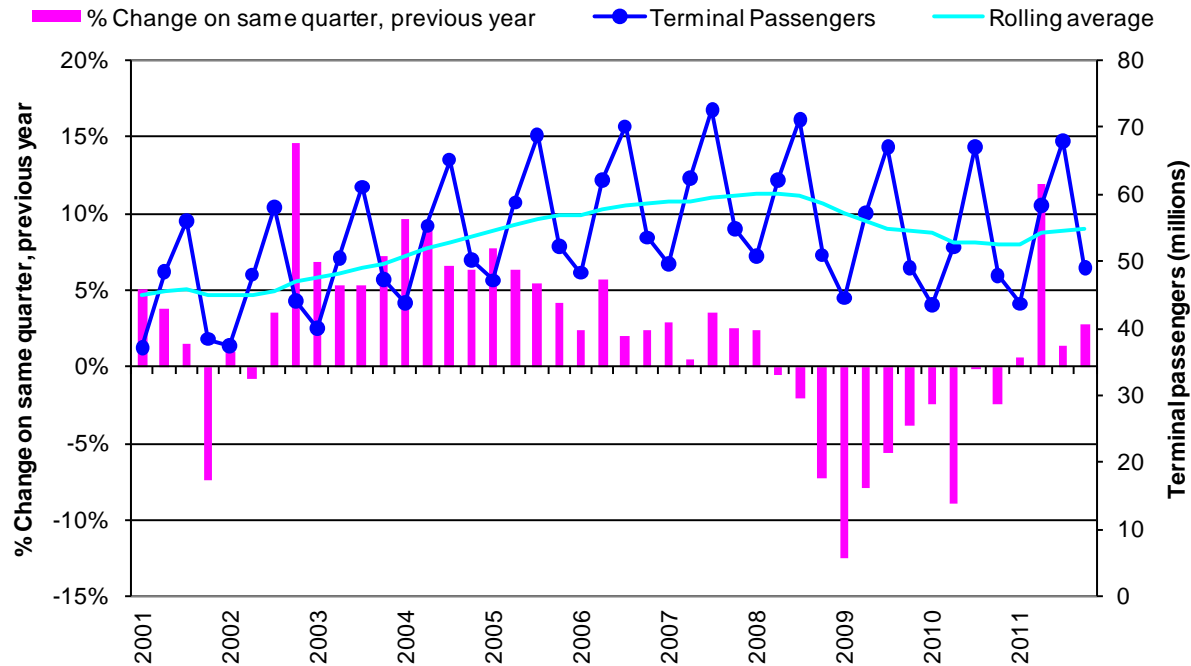
In this edition of aviation trends, we show an increase in the number of passengers and commercial flights, mainly due to recovery from the snow disruption experienced in 2010, and a small decline in cargo tonnage handled at UK airports in quarter 4 2011.

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. Due to rounding of figures, there may be an apparent slight discrepancy between the sum of the constituent items and the total as shown.

For a list of all statistics available on the CAA website, see www.caa.co.uk/statistics.

In editions of Aviation Trends prior to quarter 4 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}



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).

In quarter 4 2011, UK airports handled 49.1 million terminal passengers, a moderate improvement of 2.8% compared with the same quarter last year, mainly due to recovery from the snow disruption experienced in 2010.

Source: CAA Airport Statistics

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

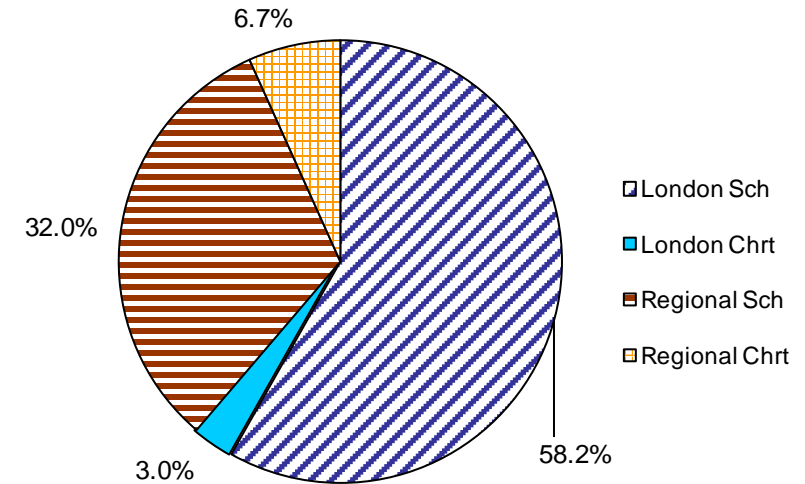
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2011		Q4 2010		+/- %	Q1 11 - Q4 11		Q1 10 - Q4 10		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
London Airports	30.9	63%	29.8	63%	3.5%	133.6	61%	127.2	61%	5.1%
- Scheduled	29.8	61%	28.7	60%	4.0%	127.0	58%	120.2	57%	5.6%
- Charter	1.1	2%	1.1	2%	-8.0%	6.7	3%	6.9	3%	-3.9%
Regional Airports	18.1	37%	17.8	37%	1.5%	84.6	39%	82.4	39%	2.7%
- Scheduled	15.6	32%	15.2	32%	2.6%	69.9	32%	67.3	32%	3.9%
- Charter	2.5	5%	2.6	5%	-5.3%	14.7	7%	15.1	7%	-2.8%
All Airports	48.9	100%	47.6	100%	2.7%	218.2	100%	209.6	100%	4.1%
- Scheduled	45.4	93%	43.9	92%	3.5%	196.9	90%	187.6	89%	5.0%
- Charter	3.5	7%	3.7	8%	-6.1%	21.3	10%	22.0	11%	-3.1%

Source: CAA Airport Statistics³

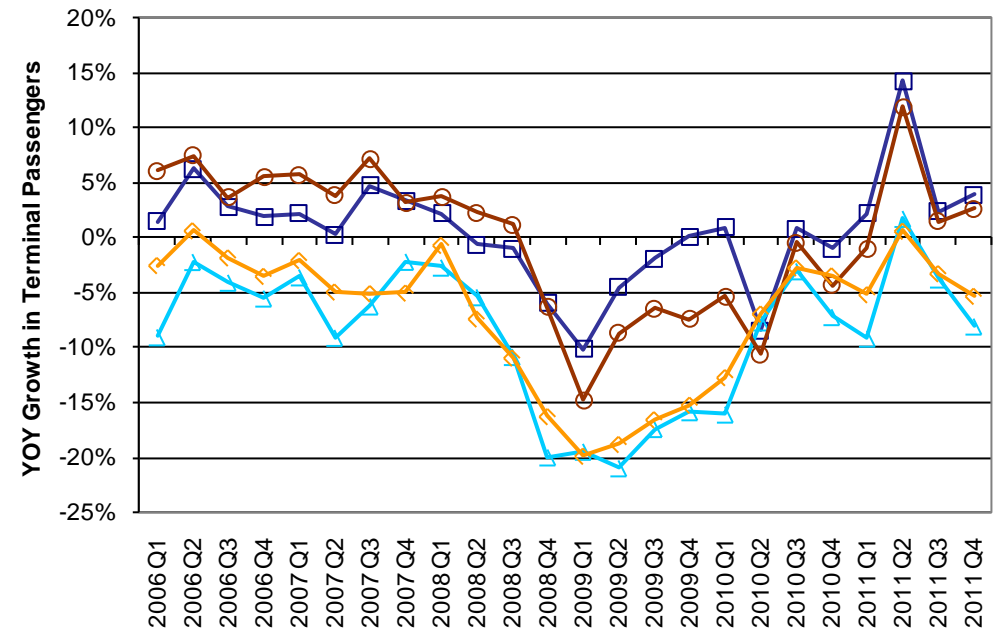
UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in the table and graph on this page therefore exclude transit passengers – those who remain aboard aircraft which land at a UK airport and then depart for another destination.

Compared to the previous year, in quarter 4 2011, there were 3.5% more scheduled passengers but 6.1% fewer charter passengers at all airports. The number of scheduled passengers at regional airports increased by 2.6%, whereas London airports saw a 4.0% rise. The number of charter passengers fell at both regional airports (5.3%) and London airports (8.0%).

Passenger Share (year to date)



Legend for charts:
 London Sch (Blue square), London Chrt (Cyan triangle), Regional Sch (Brown circle), Regional Chrt (Orange diamond)



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

Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2011		Q4 2010		+/- %	Q1 11 - Q4 11		Q1 10 - Q4 10		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
London Airports	230.8	53%	223.7	52%	3.2%	977.9	51%	940.4	51%	4.0%
- Scheduled	224.8	51%	217.0	50%	3.6%	941.9	50%	903.9	49%	4.2%
- Charter	6.0	1%	6.6	2%	-9.8%	36.0	2%	36.5	2%	-1.4%
Regional Airports	207.7	47%	209.4	48%	-0.8%	922.9	49%	918.6	49%	0.5%
- Scheduled	192.7	44%	193.7	45%	-0.5%	839.4	44%	832.6	45%	0.8%
- Charter	15.0	3%	15.7	4%	-4.8%	83.5	4%	86.1	5%	-3.0%
All Airports	438.5	100%	433.1	100%	1.2%	1,900.8	100%	1,859.0	100%	2.2%
- Scheduled	417.5	95%	410.7	95%	1.7%	1,781.3	94%	1,736.4	93%	2.6%
- Charter	20.9	5%	22.3	5%	-6.2%	119.5	6%	122.6	7%	-2.5%

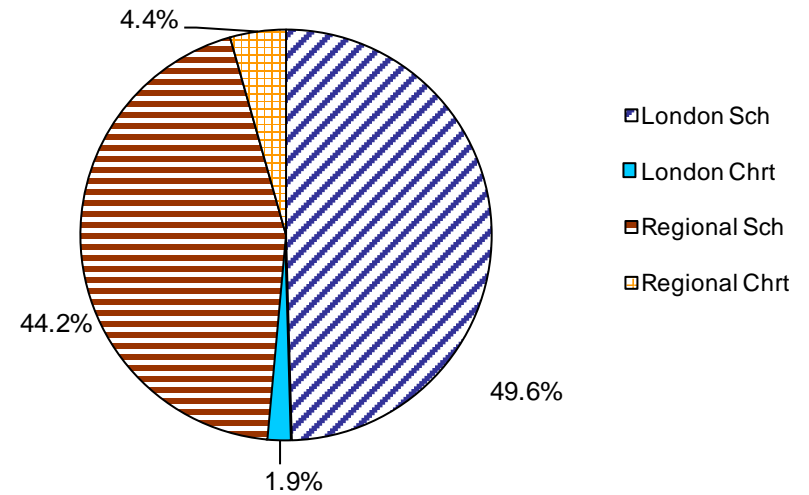
Source: CAA Airport Statistics

The figures in this table are for commercial passenger flights and thus exclude flights of aircraft exclusively carrying cargo.

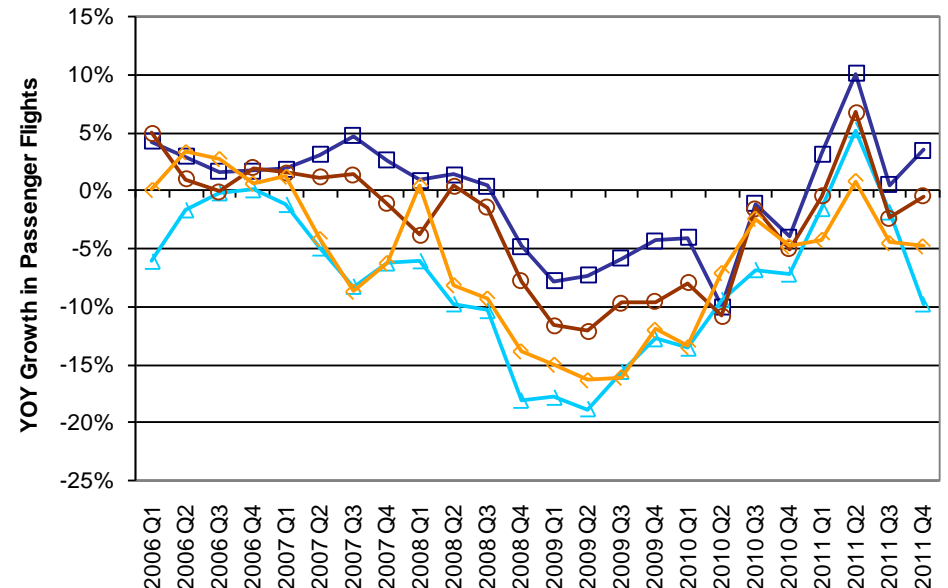
Compared to quarter 4 2010, the number of passenger flights in all UK airports increased by 1.2% in quarter 4 2011. The number of scheduled flights was up 1.7% and the number of charter flights was down 6.2%. On a rolling year basis, there were 2.6% more scheduled flights and 2.5% less charter flights across all UK airports.

There were 3.2% more flights at London airports and 0.8% fewer flights at regional airports in quarter 4 2011. On a rolling year basis, the number of flights grew by 4.0% and 0.5% at London and regional airports respectively.

Flight Share (year to date)



Legend: London Sch (blue square), London Chrt (cyan triangle), Regional Sch (brown circle), Regional Chrt (orange diamond)

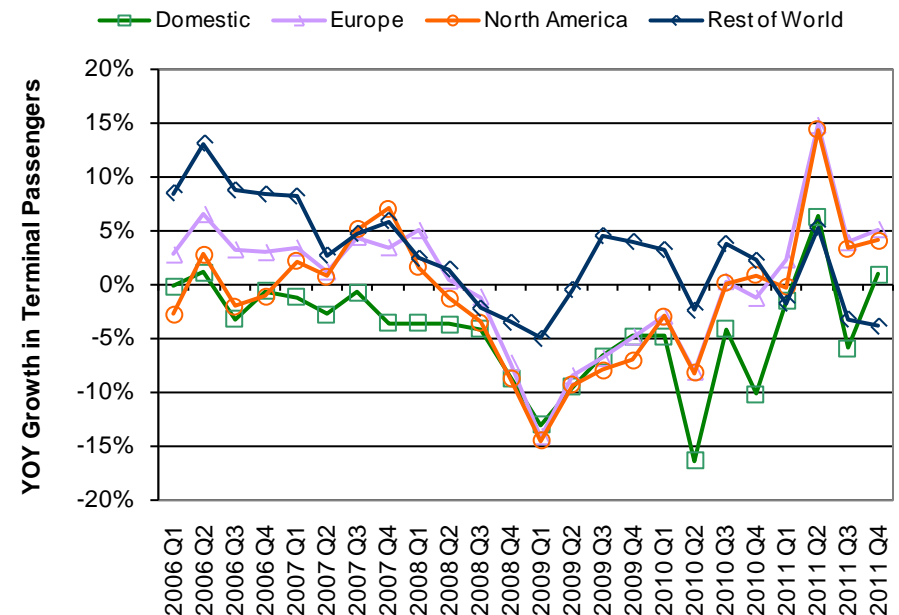
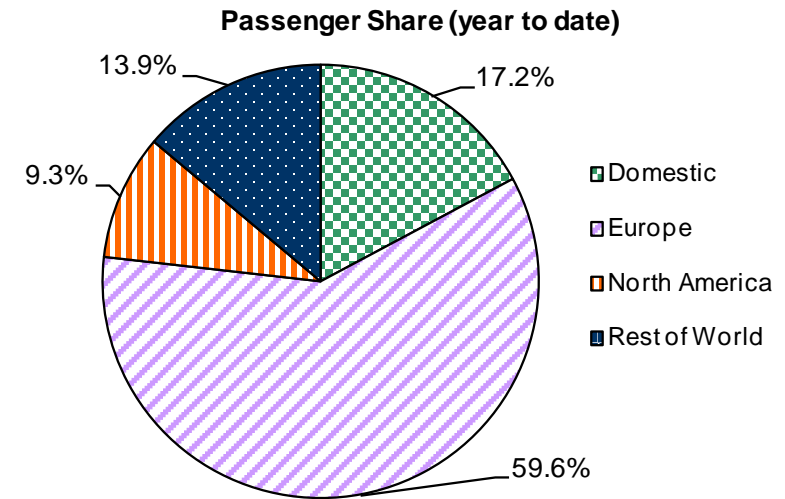


4. Terminal passengers at UK airports by origin / destination^{6,7,8,9,11}

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2011		Q4 2010		+/- %	Q1 11 - Q4 11		Q1 10 - Q4 10		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
Domestic	9.1	19%	9.0	19%	0.9%	37.5	17%	37.7	18%	-0.4%
- Scheduled	9.0	18%	8.9	19%	1.0%	37.2	17%	37.3	18%	-0.4%
- Charter	0.1	0.2%	0.1	0.2%	-2.1%	0.4	0.2%	0.3	0.2%	3.5%
Europe	27.7	57%	26.3	55%	5.1%	130.0	60%	122.0	58%	6.6%
- Scheduled	25.1	51%	23.7	50%	6.0%	112.7	52%	104.4	50%	8.0%
- Charter	2.6	5%	2.7	6%	-3.5%	17.3	8%	17.6	8%	-1.5%
North America	4.7	10%	4.5	10%	4.1%	20.3	9%	19.2	9%	5.6%
- Scheduled	4.7	10%	4.5	9%	4.2%	19.9	9%	18.8	9%	5.5%
- Charter	0.1	0.1%	0.1	0.1%	-5.2%	0.4	0.2%	0.4	0.2%	9.9%
Rest of World	7.4	15%	7.7	16%	-3.9%	30.3	14%	30.7	15%	-1.1%
- Scheduled	6.7	14%	6.8	14%	-2.5%	27.1	12%	27.0	13%	0.5%
- Charter	0.8	2%	0.9	2%	-14.2%	3.2	1%	3.7	2%	-12.7%
Total	48.9	100%	47.6	100%	2.7%	218.2	100%	209.6	100%	4.1%
- Scheduled	45.4	93%	43.9	92%	3.5%	196.9	90%	187.6	89%	5.0%
- Charter	3.5	7%	3.7	8%	-6.1%	21.3	10%	22.0	11%	-3.1%

Source: CAA Airport Statistics

In quarter 4 2011, the number of passengers on board domestic flights was up 0.9% compared with the same quarter last year. There were 5.1% and 4.1% more passengers travelling to and from European destinations and North America respectively. Travel to and from 'Rest of the World' showed a 3.9% decrease, and total passenger numbers increased by 2.7% compared to quarter 4 2010.



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

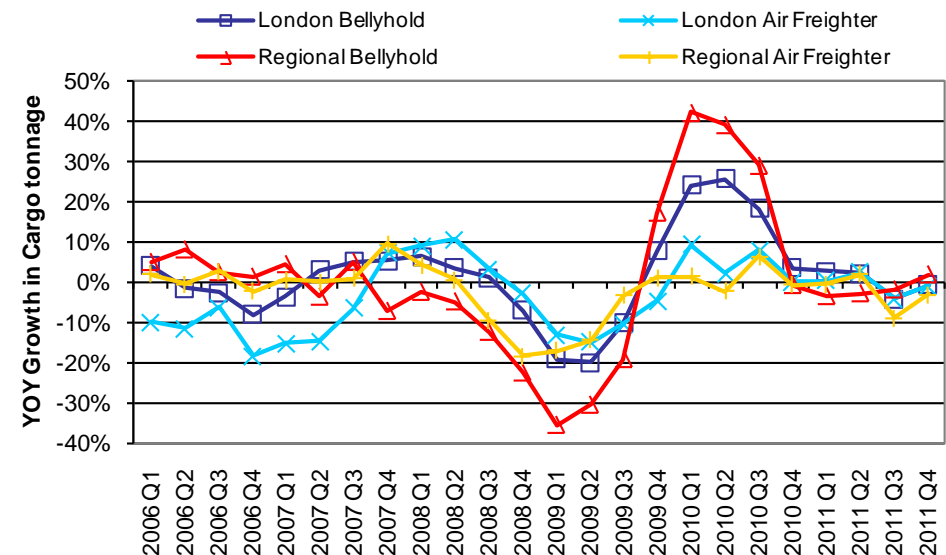
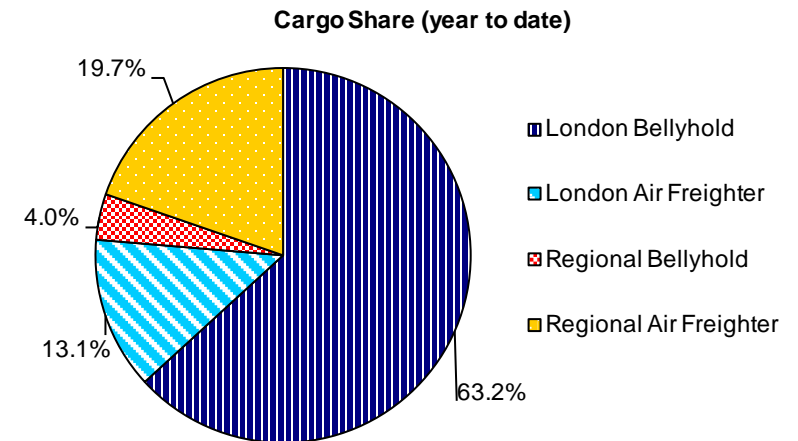
Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2011		Q4 2010		+/- %	Q1 11 - Q4 11		Q1 10 - Q4 10		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
Cargo on cargo only flights	214.5	33%	219.2	34%	-2.1%	825.9	33%	840.9	33%	-1.8%
London	84.1	13%	84.8	13%	-0.8%	330.4	13%	332.0	13%	-0.5%
Regional	130.4	20%	134.4	21%	-3.0%	495.5	20%	508.9	20%	-2.6%
Bellyhold cargo	430.3	67%	431.6	66%	-0.3%	1,688.7	67%	1,687.3	67%	0.1%
London	404.9	63%	406.8	63%	-0.5%	1,589.1	63%	1,586.4	63%	0.2%
Regional	25.4	4%	24.8	4%	2.1%	99.6	4%	101.0	4%	-1.3%
Total cargo	644.8	100%	650.8	100%	-0.9%	2,514.6	100%	2,528.2	100%	-0.5%
London	489.0	76%	491.5	76%	-0.5%	1,919.5	76%	1,918.4	76%	0.1%
Regional	155.7	24%	159.2	24%	-2.2%	595.1	24%	609.8	24%	-2.4%

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.

In quarter 4 2011, the quarterly year-on-year cargo tonnage at all UK airports was down 0.9% compared with quarter 4 2010. London airports saw a smaller decrease (0.5%) compared to regional airports (2.2%). On a rolling year basis, overall cargo tonnage decreased by 0.5% compared to the previous year.

Air freighter cargo tonnage saw a drop of 2.1% compared with the same quarter last year. Over the same period, bellyhold tonnage decreased by 0.3%.



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

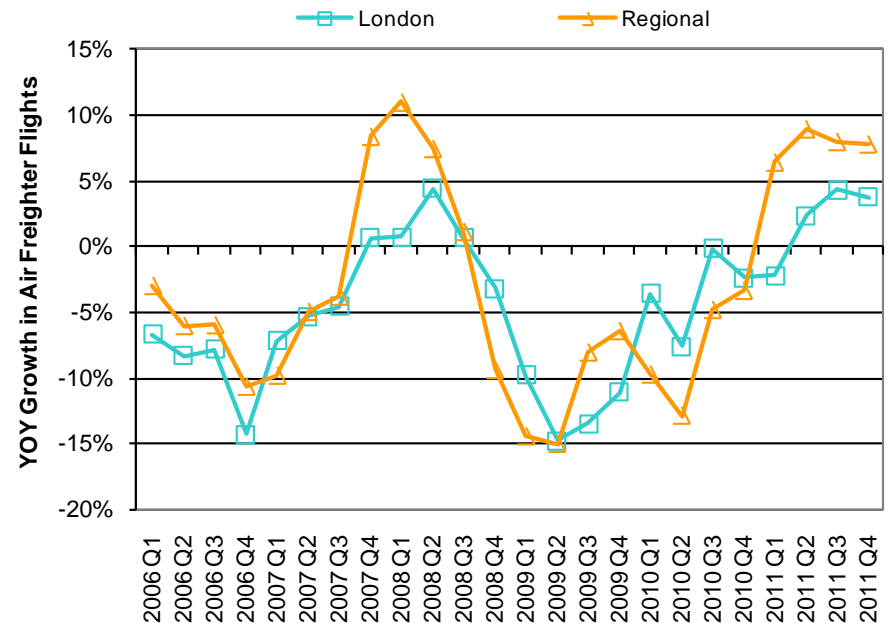
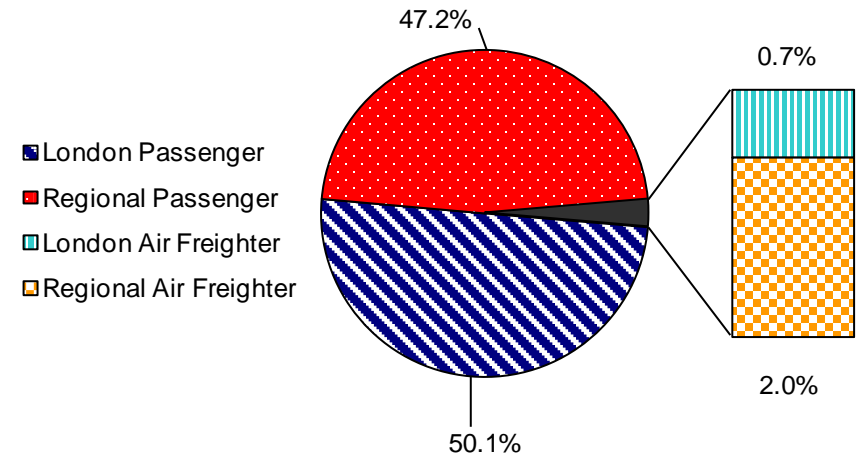
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2011		Q4 2010		+/- %	Q4 2010		Q4 2011		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
Air freighter	13.6	3%	12.7	3%	6.7%	52.6	3%	49.6	3%	6.2%
London	3.6	1%	3.4	1%	3.8%	14.2	1%	13.9	1%	2.1%
Regional	10.0	2%	9.3	2%	7.8%	38.5	2%	35.7	2%	7.8%
Passenger flights	438.5	97%	433.1	97%	1.2%	1,900.8	97%	1,859.0	97%	2.2%
London	230.8	51%	223.7	50%	3.2%	977.9	50%	940.4	49%	4.0%
Regional	207.7	46%	209.4	47%	-0.8%	922.9	47%	918.6	48%	0.5%
Total flights	452.0	100%	445.8	100%	1.4%	1,953.5	100%	1,908.6	100%	2.4%
London	234.3	52%	227.1	51%	3.2%	992.1	51%	954.3	50%	4.0%
Regional	217.7	48%	218.7	49%	-0.4%	961.3	49%	954.3	50%	0.7%

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.

In quarter 4 2011, total commercial flights in the UK increased by 1.4% compared to the same quarter in 2010. The number of passenger flights and air freighter flights were up 1.2% and 6.7% respectively. On a rolling year basis, the total number of flights was up 2.4%.

Flights Share (year to date)



Did you know? A brief review of the UK aviation industry, 1973 – 2011

The CAA has recently added scanned traffic data publications from 1973 onwards to its website. Here we look at some of the changes that have been seen in those years.

UK airlines passenger traffic

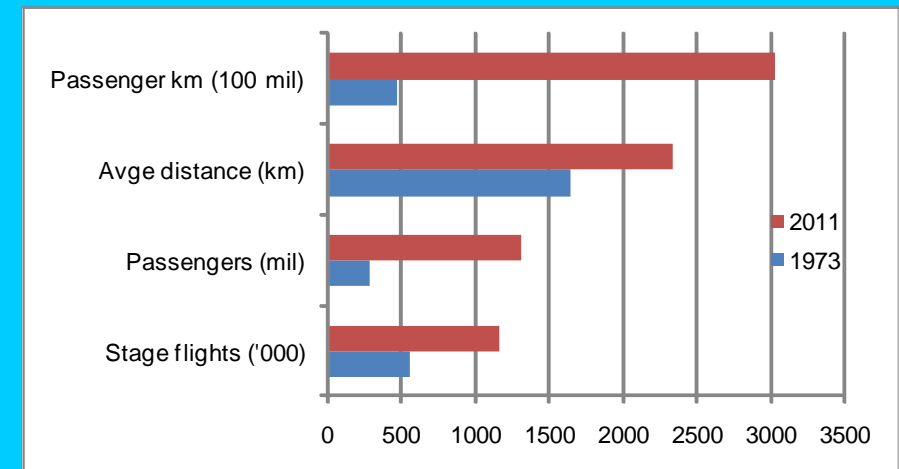
During the period from 1973 to 2011^{*1}, the number of passenger stage flights performed by UK airlines doubled from 522,000 to 1,156,000. In 2011, the number of passengers uplifted was nearly 130 million, and total passenger kilometres (the number of passengers multiplied by the stage distance) was 303 billion. The corresponding figures in 1973 were 28 million passengers and 46 billion passenger kilometres. Thus, the overall average distance travelled per passenger was 2,334 km in 2011, compared to 1,643 km in 1973.

Consolidation of the UK airline industry

The past 30 years has been a period of tremendous change for the industry. Events such as the oil crisis, deregulation, terrorist attacks and the resultant more stringent security checks, industrial actions, the outbreak of the SARS, volcanic eruption, all contributed to a more challenging operating environment.

Against this backdrop, many UK airlines did not survive, and others merged with or were acquired by other businesses, although many new carriers came into existence also. The trend of airline consolidation is shown by the decrease in the number of commercial airlines registered in the UK^{*2} from 56 in 1973 to 33 in 2011. A few airlines, namely British Airways, British Midland Airways, Loganair and Monarch, are still trading under the same name after all these years, although there may have been changes in their ownership structure.

From 1973 to 2011, the collective fleet size of all UK airlines doubled from 484 to 984^{*3}. The aircraft mix has substantially changed as old aircraft were phased out and replaced by long-range and more fuel efficient ones. Nevertheless, one aircraft model, the Pilatus Islander, is still flown by Loganair in 2011, just as it was in 1973.



The above information is extracted from CAA historical UK Airline and Airport statistics (1973 – 1997). Both monthly and calendar year annual tables are available at <http://www.caa.co.uk/trafficstatistics>.

^{*1} The twelve months to November 2011

^{*2} This is the number of airlines holding CAA Type A Air Operator Certificate (AOC). In 1973, different divisions of British Airways (Overseas Division, European Division, Cambrian Airways, British Caledonian Airways) held their own AOCs, therefore they were considered separate airlines.

^{*3} As at end of September 2011

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.