

Aviation Trends

Quarter 3 2012



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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. This quarter we have expanded Part 1 'Historical overview of traffic' and added a new Part 7 'Punctuality of passenger flights to and from UK 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 introduce the new data series in Parts 1 and 7.

In this edition of aviation trends, with traffic to and from North Sea oilrigs included, we show a modest rise in the number of passengers and a small decrease in the number of commercial flights handled at all UK airports. Cargo tonnage remained at the same level as in the previous year.

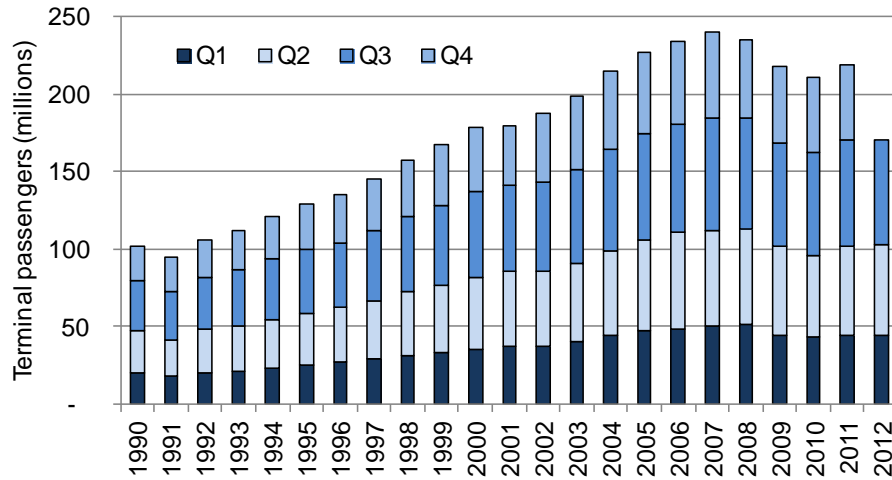
The Aviation Trends series is available at www.caa.co.uk/aviationtrends, part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications, which provide more detailed information on UK aviation activity. Please note that historic numbers may be subject to minor change as the result of prior period adjustments. 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.

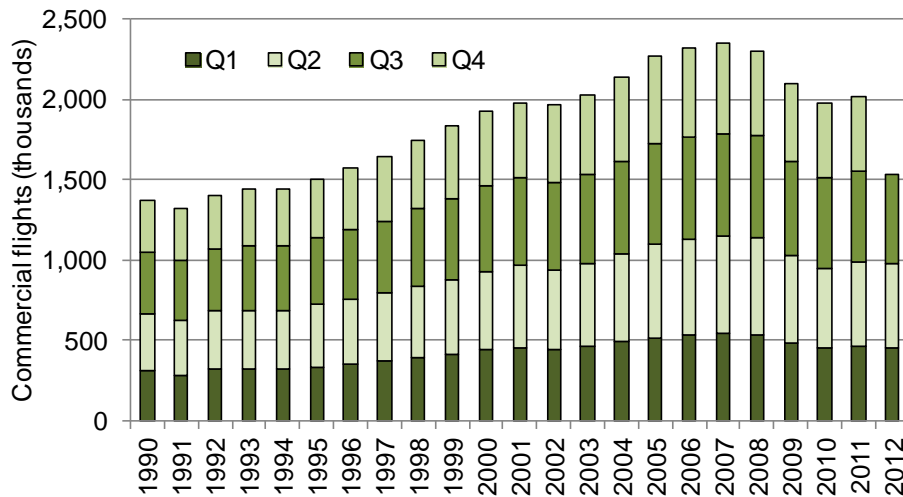
In editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. Because these islands are not formally part of the UK, and we wish to present only the trends at UK airports, their figures are now excluded.

1. Historical overview of traffic see note 5 on p.14

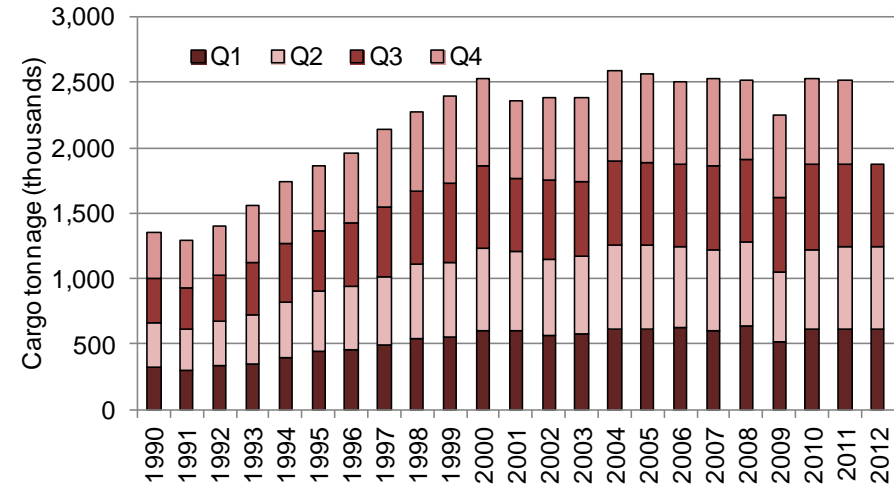
a. Terminal passengers



b. Commercial flights



c. Cargo tonnage



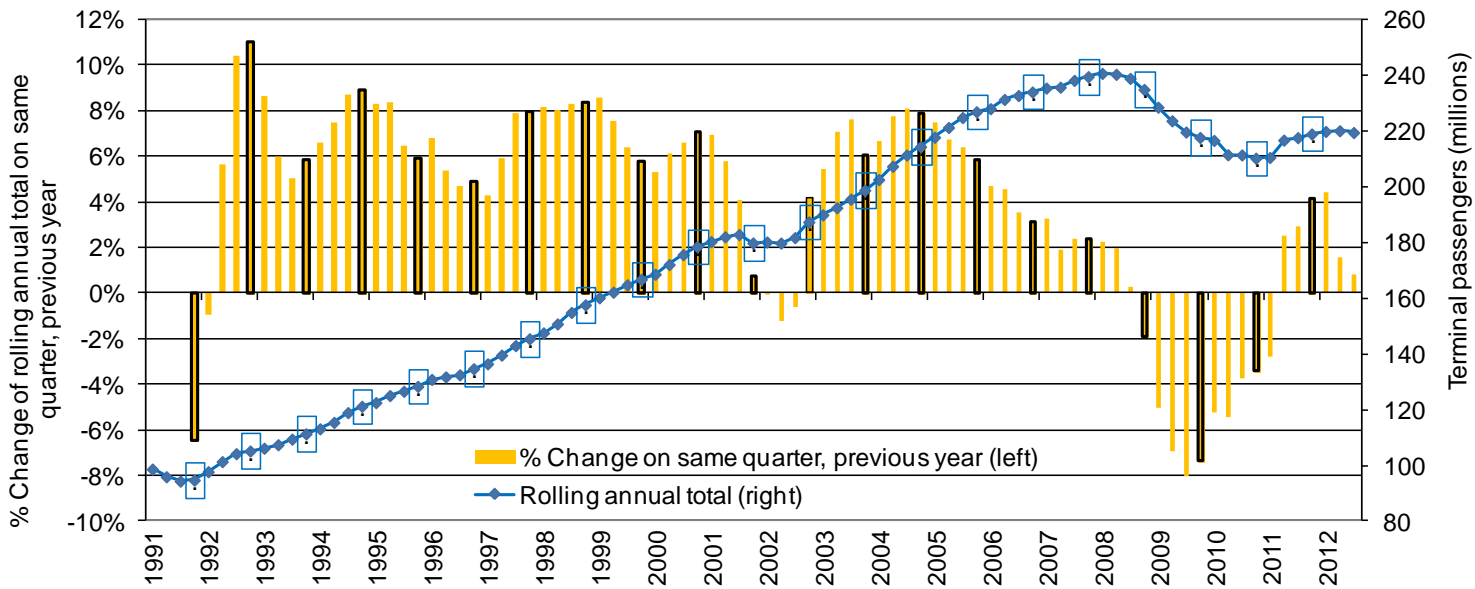
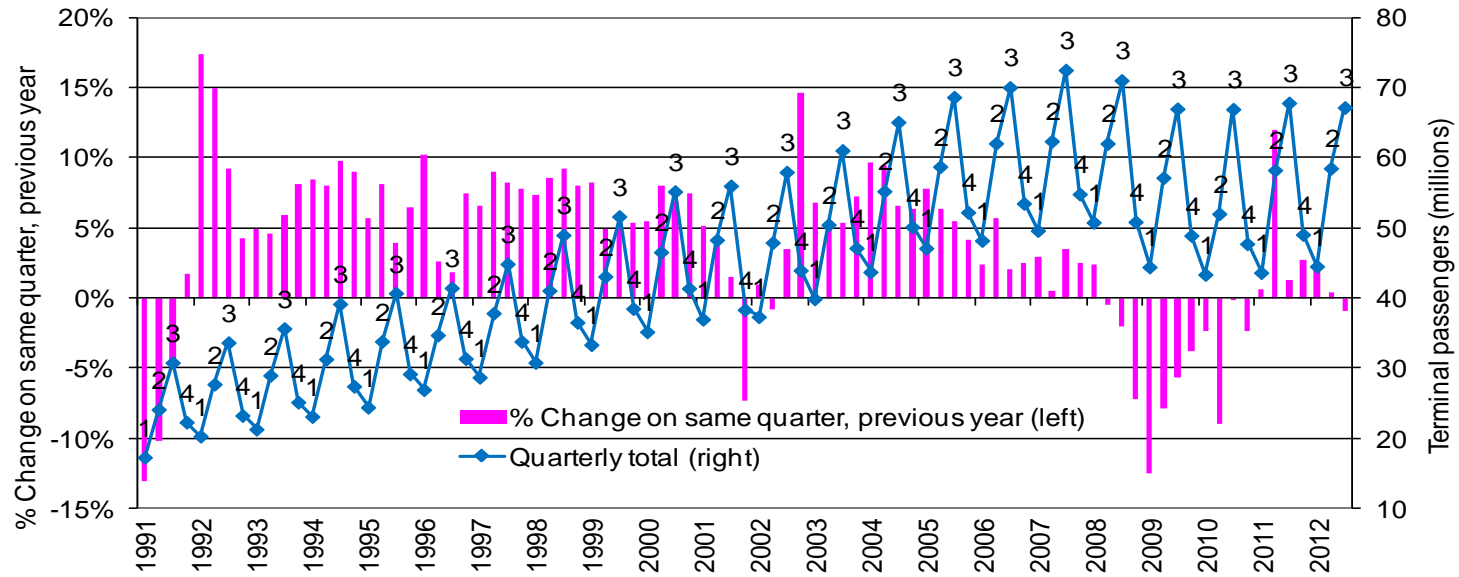
Plotting quarterly data of terminal passengers, commercial flights and cargo tonnage shows both seasonal and annual trends in UK aviation activity. The quarterly traffic volumes for each of the three quantities are shown on this page.

On pages 4 to 6, the first chart shows traffic in each quarter (on the right axis), and the percentage growth on the previous year's number in the same quarter (on the left axis).

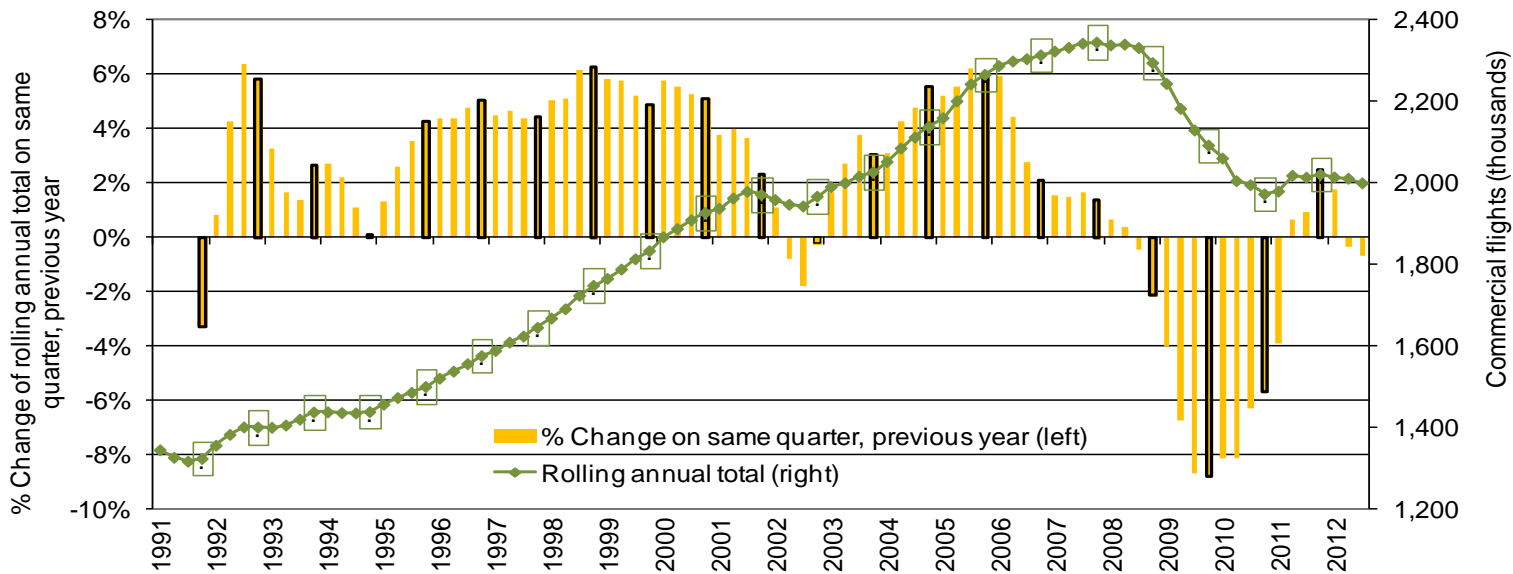
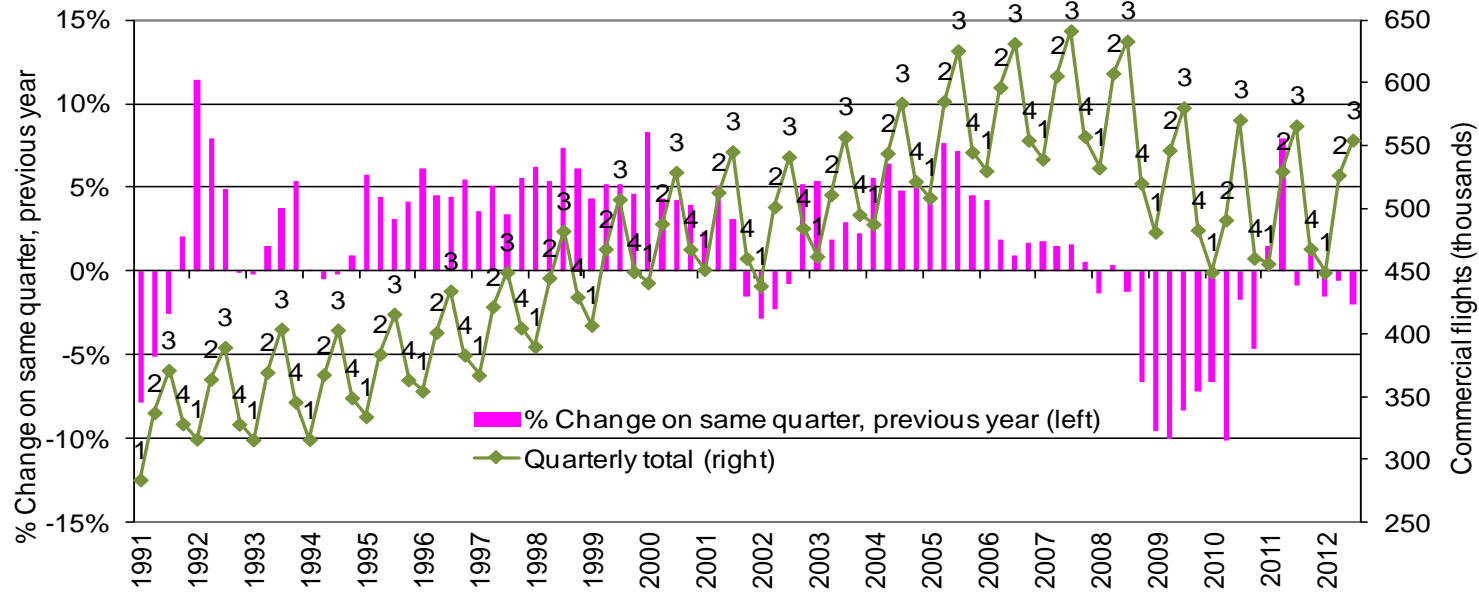
The second chart shows the rolling annual total in each quarter (on the right axis), and the percentage growth of the rolling annual total on the previous year's number in the same quarter (on the left axis). The highlighted data points are the annual traffic volumes and growth rates of the respective calendar years.

In quarter 3 2012, UK airports handled 67.2 million terminal passengers (an increase of 0.8%), 554,801 commercial flights (a fall of 0.7%), and 633,015 tonnes of cargo (the same level as in the previous year).

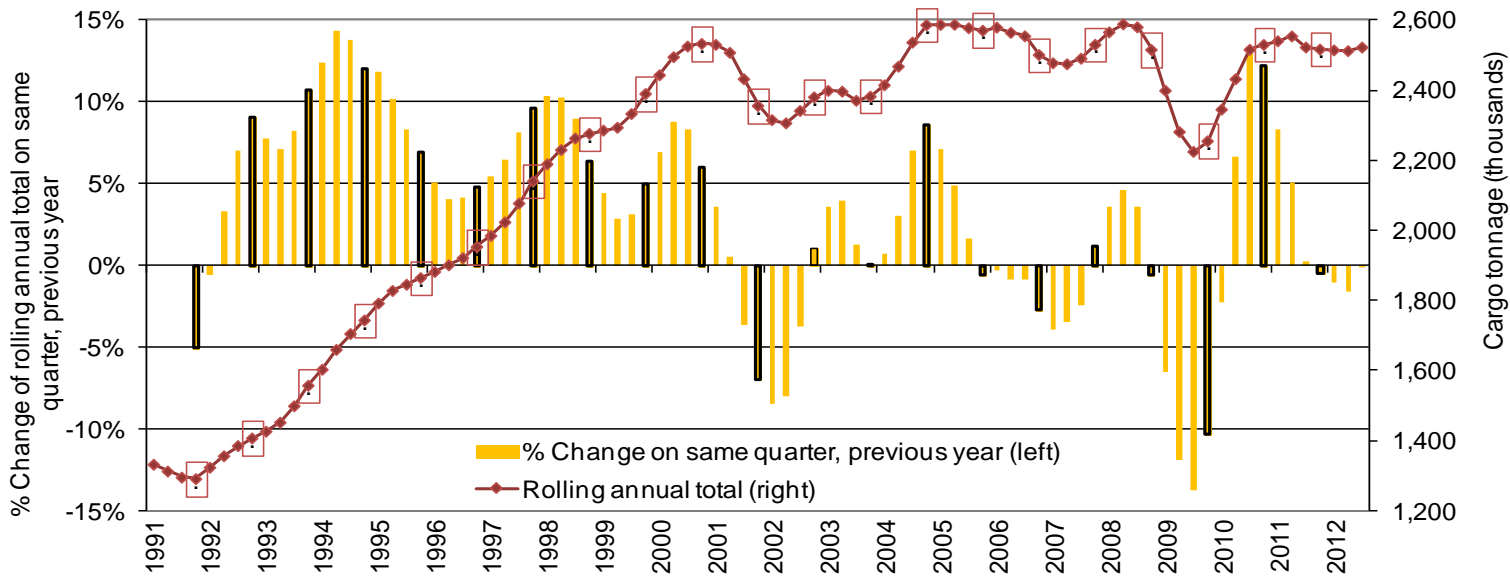
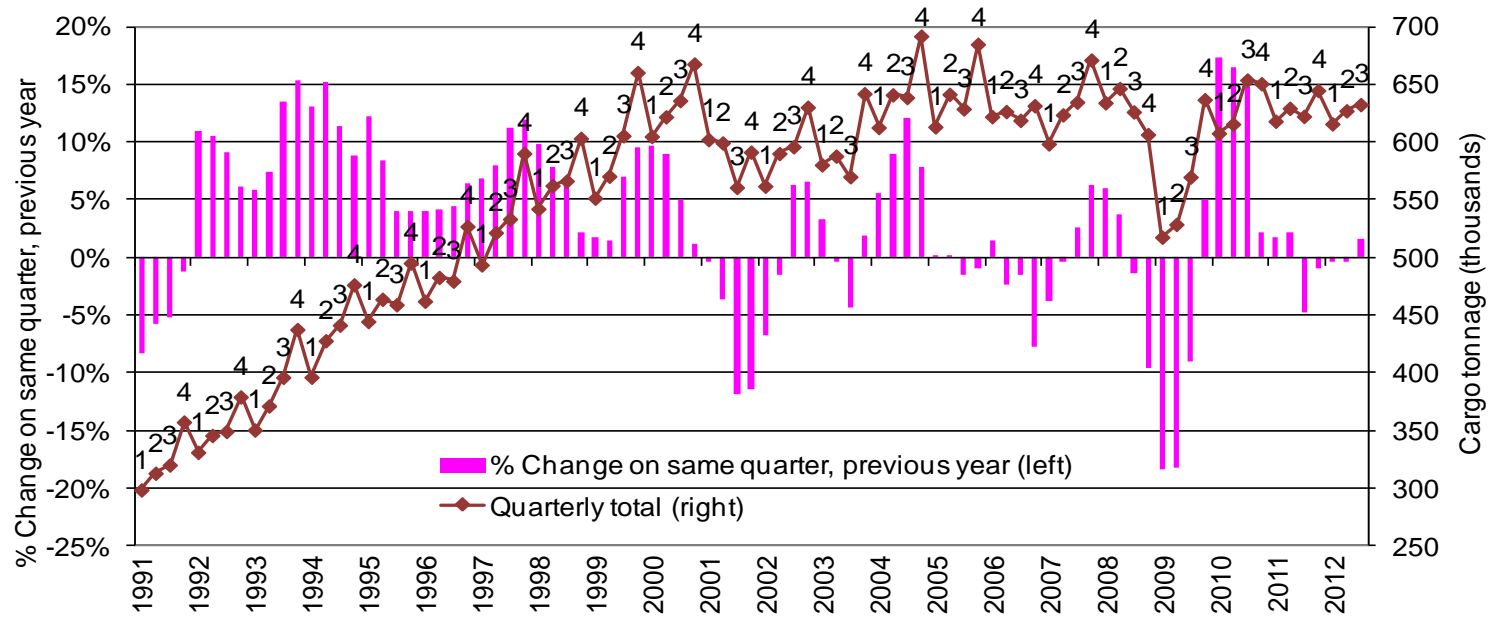
a. Terminal passengers



b. Commercial flights

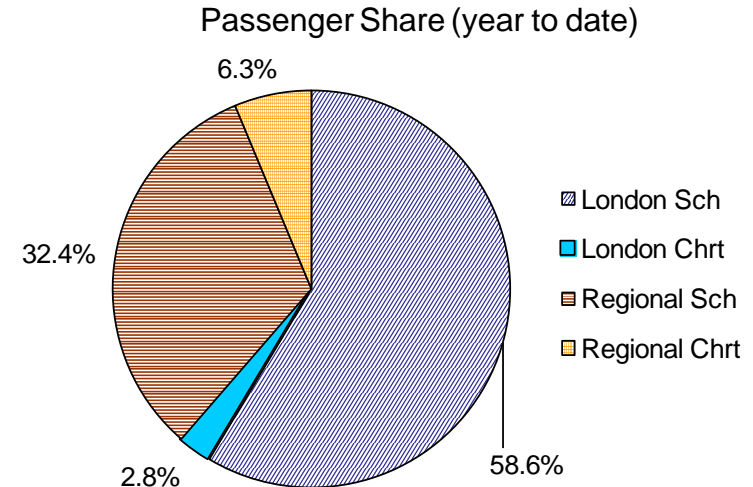


c. Cargo tonnage



2. Terminal passengers at UK airports see note 5 on p.14

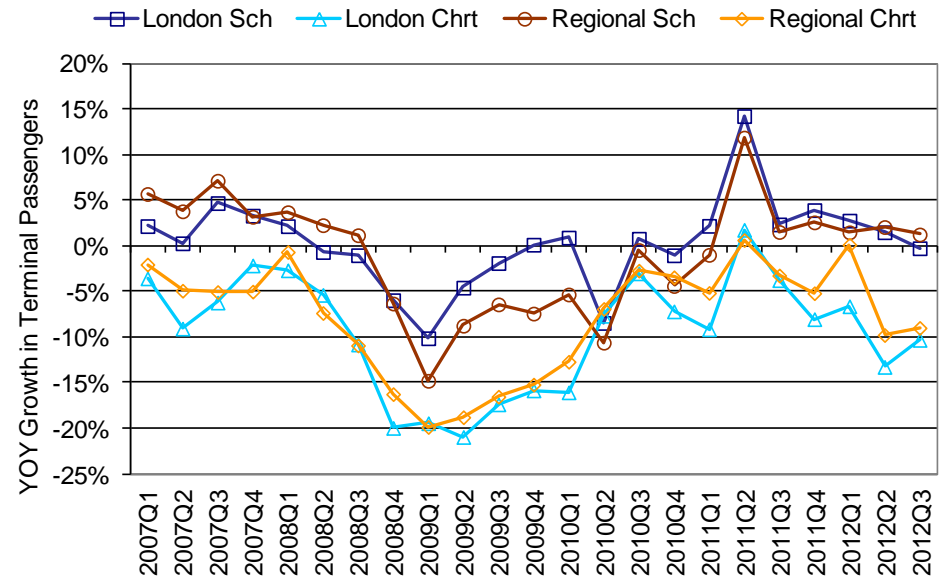
Passengers (Millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2012		Q3 2011		+/- %	Q4 11 – Q3 12		Q4 10 – Q3 11		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
London Airports	39.6	59%	40.0	59%	-0.9%	134.2	61%	132.6	61%	1.2%
- Scheduled	37.1	55%	37.2	55%	-0.2%	128.1	59%	125.8	58%	1.8%
- Charter	2.5	4%	2.8	4%	-10.3%	6.1	3%	6.7	3%	-10.1%
Regional Airports	27.4	41%	27.7	41%	-1.0%	84.5	39%	84.3	39%	0.2%
- Scheduled	21.9	33%	21.6	32%	1.3%	70.8	32%	69.5	32%	1.8%
- Charter	5.5	8%	6.1	9%	-9.0%	13.7	6%	14.8	7%	-7.4%
All Airports	67.0	100%	67.7	100%	-0.9%	218.7	100%	216.9	100%	0.8%
- Scheduled	59.0	88%	58.8	87%	0.3%	198.9	91%	195.4	90%	1.8%
- Charter	8.0	12%	8.8	13%	-9.4%	19.8	9%	21.6	10%	-8.2%



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.

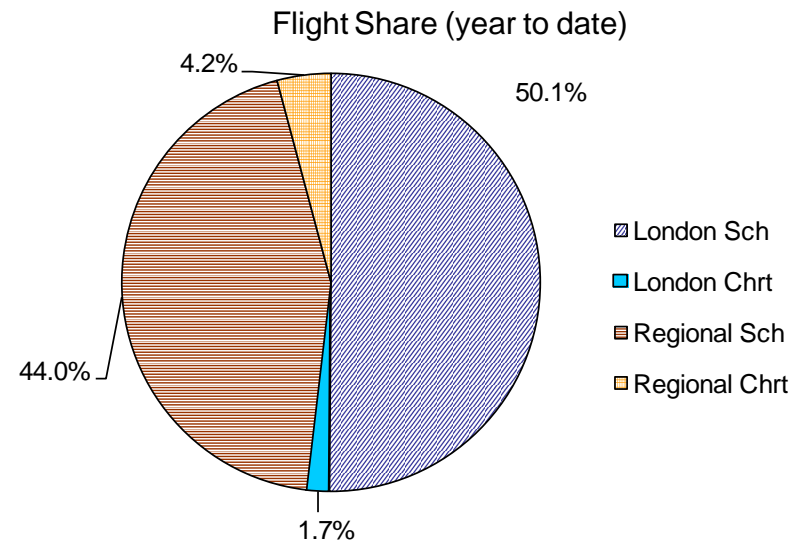
In quarter 3 2012, compared to the same quarter last year, the London airports handled 0.9% fewer passengers, and regional airports saw a drop of 1.0%. On a rolling year basis, passenger numbers were 1.2% and 0.2% higher than the year before at London airports and regional airports respectively.

Across all UK airports, the number of passengers on scheduled flights was up 0.3% and down 9.4% on charter flights compared with quarter 3 2011.



3. Passenger flights to and from UK airports see note 5 on p.14

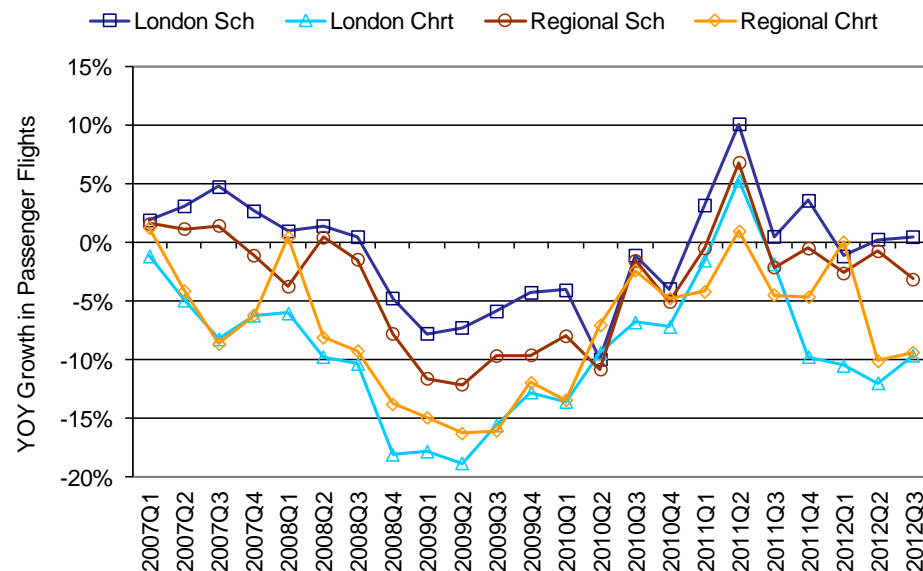
Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2012		Q3 2011		+/- %	Q4 11 – Q3 12		Q4 10 – Q3 11		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
London Airports	266.8	51%	267.0	50%	-0.1%	974.0	52%	970.8	51%	0.3%
- Scheduled	254.3	49%	253.1	47%	0.5%	941.1	50%	934.1	49%	0.7%
- Charter	12.6	2%	13.9	3%	-9.6%	32.9	2%	36.7	2%	-10.4%
Regional Airports	256.6	49%	267.0	50%	-3.9%	903.9	48%	925.1	49%	-2.3%
- Scheduled	227.3	43%	234.7	44%	-3.2%	825.9	44%	840.9	44%	-1.8%
- Charter	29.3	6%	32.4	6%	-9.4%	78.0	4%	84.2	4%	-7.4%
All Airports	523.4	100%	534.0	100%	-2.0%	1,877.9	100%	1,895.9	100%	-1.0%
- Scheduled	481.5	92%	487.7	91%	-1.3%	1,767.0	94%	1,775.0	94%	-0.5%
- Charter	41.9	8%	46.3	9%	-9.5%	110.9	6%	120.9	6%	-8.3%



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

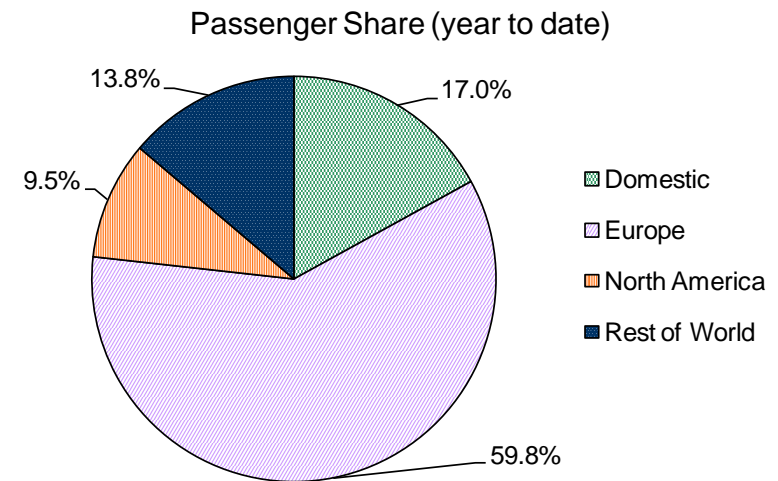
Compared to quarter 3 2011, the number of passenger flights at all UK airports decreased by 2.0% in quarter 3 2012. There were 1.3% fewer scheduled flights and 9.5% fewer charter flights. On a rolling year basis, the numbers of scheduled and charter flights were down 0.5% and 8.3% respectively.

There were 0.1% fewer flights at London airports and 3.9% fewer flights at regional airports in quarter 3 2012 than in the same period in 2011. On a rolling year basis, the number of flights grew by 0.3% at London airports, and decreased by 2.3% at regional airports.



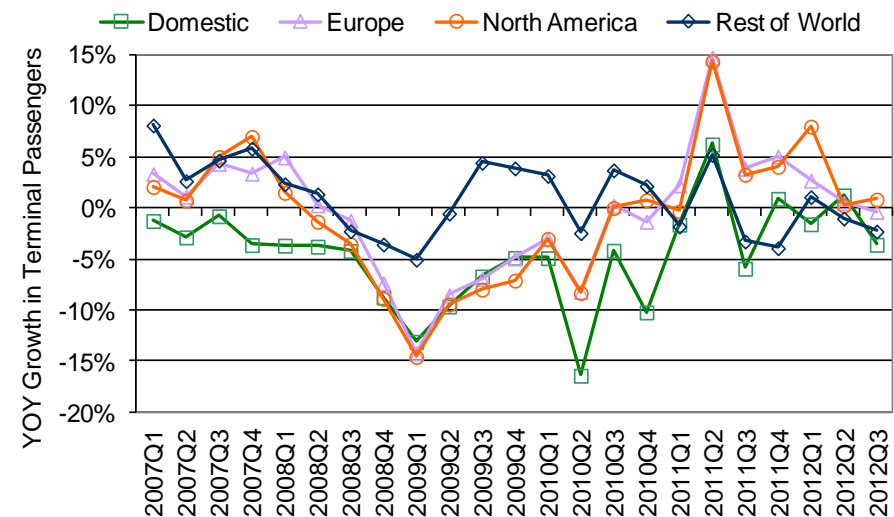
4. Terminal passengers at UK airports by origin / destination see note 5 on p.14

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2012		Q3 2011		+/- %	Q4 11 – Q3 12		Q4 10 – Q3 11		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
Domestic	9.9	15%	10.3	15%	-3.6%	37.1	17%	37.4	17%	-0.8%
- Scheduled	9.8	15%	10.2	15%	-3.6%	36.8	17%	37.1	17%	-0.8%
- Charter	0.1	0.1%	0.1	0.1%	0.9%	0.4	0.2%	0.4	0.2%	2.9%
Europe	42.9	64%	43.0	64%	-0.3%	130.7	60%	128.7	59%	1.6%
- Scheduled	36.0	54%	35.4	52%	1.7%	114.9	53%	111.3	51%	3.2%
- Charter	6.9	10%	7.6	11%	-9.8%	15.9	7%	17.4	8%	-8.8%
North America	6.3	9%	6.2	9%	0.9%	20.7	9%	20.1	9%	2.7%
- Scheduled	6.1	9%	6.0	9%	1.8%	20.3	9%	19.7	9%	3.1%
- Charter	0.2	0.3%	0.2	0.3%	-23.1%	0.4	0.2%	0.4	0.2%	-12.2%
Rest of World	8.0	12%	8.1	12%	-2.3%	30.1	14%	30.6	14%	-1.6%
- Scheduled	7.1	11%	7.3	11%	-2.1%	27.0	12%	27.3	13%	-1.0%
- Charter	0.8	1%	0.9	1%	-3.6%	3.1	1%	3.3	2%	-6.1%
Total	67.0	100%	67.7	100%	-0.9%	218.7	100%	216.9	100%	0.8%
- Scheduled	59.0	88%	58.8	87%	0.3%	198.9	91%	195.4	90%	1.8%
- Charter	8.0	12%	8.8	13%	-9.4%	19.8	9%	21.6	10%	-8.2%



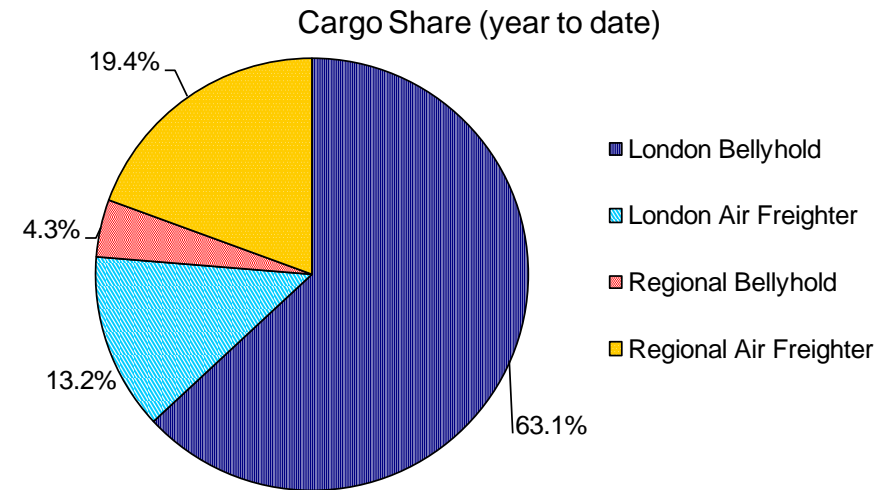
Compared to the same quarter last year, in quarter 3 2012, only North America saw an increase (0.9%) in passengers. There were 3.6%, 0.3% and 2.3% fewer passengers travelling to and from domestic destinations, Europe and Rest of the world respectively.

On a rolling year basis, the total number of passengers was up 0.8%. The numbers of passengers travelling to and from Europe and North America have rose by 1.6% and 2.7% respectively, whereas domestic destinations and Rest of the world saw a decrease of 0.8% and 1.6% respectively.



5. Air cargo tonnes carried to and from UK airports see note 5 on p.14

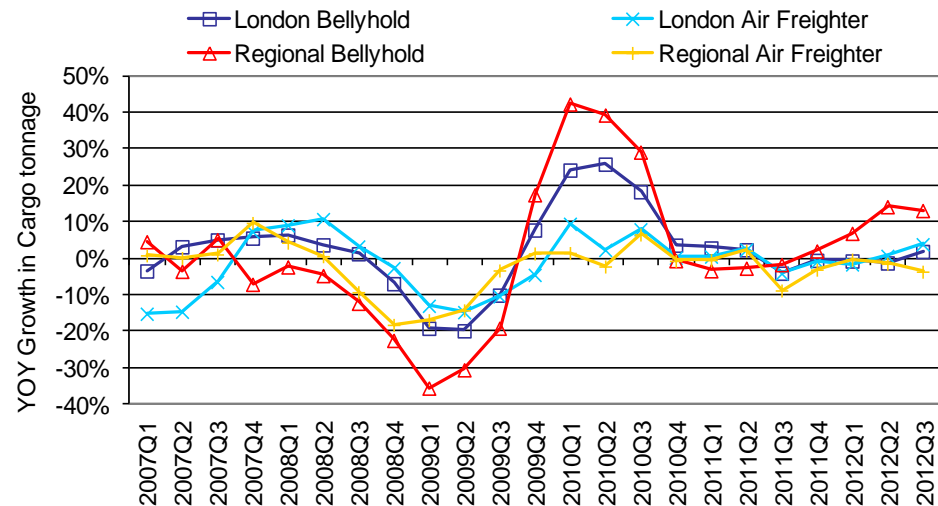
Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2012		Q3 2011		+/- %	Q4 11 – Q3 12		Q4 10 – Q3 11		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
Cargo on cargo only flights	202.1	32%	203.1	33%	-0.5%	822.4	33%	830.6	33%	-1.0%
- London	85.7	14%	82.4	13%	4.0%	333.0	13%	331.0	13%	0.6%
- Regional	116.4	18%	120.7	19%	-3.5%	489.3	19%	499.6	20%	-2.0%
Bellyhold cargo	430.5	68%	419.2	67%	2.7%	1,698.0	67%	1,690.0	67%	0.5%
- London	400.4	63%	392.7	63%	2.0%	1,589.8	63%	1,590.9	63%	-0.1%
- Regional	30.0	5%	26.5	4%	13.2%	108.2	4%	99.1	4%	9.2%
Total cargo	632.6	100%	622.3	100%	1.6%	2,520.4	100%	2,520.6	100%	0.0%
- London	486.1	77%	475.1	76%	2.3%	1,922.8	76%	1,922.0	76%	0.0%
- Regional	146.5	23%	147.2	24%	-0.5%	597.6	24%	598.6	24%	-0.2%



Air cargo – freight and mail – is transported in and out of the UK on air freighters and in the bellyholds of passenger aircraft.

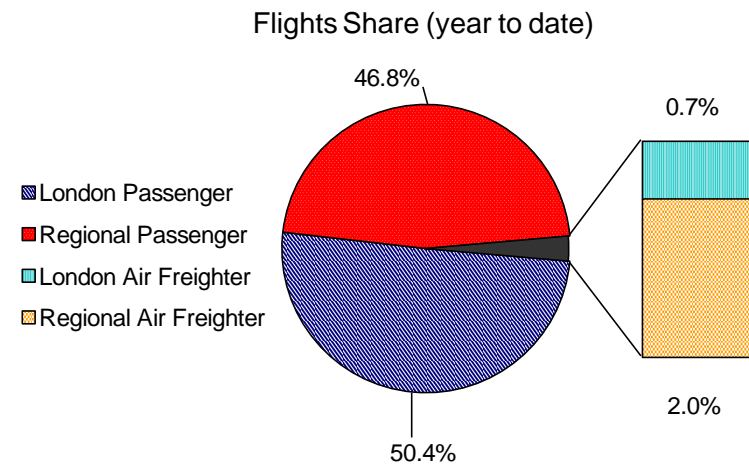
Compared to the same period in 2011, in quarter 3 2012, total cargo tonnage at all UK airports was up 1.6%. It increased by 2.3% at London airports and decreased by 0.5% at Regional airports. On a rolling year basis, it remained at a level similar to the year before.

Air freighter cargo tonnage dropped by 0.5% whereas bellyhold cargo tonnage rose 2.7% compared with the same quarter last year.



6. All commercial flights to and from UK airports see note 5 on p.14

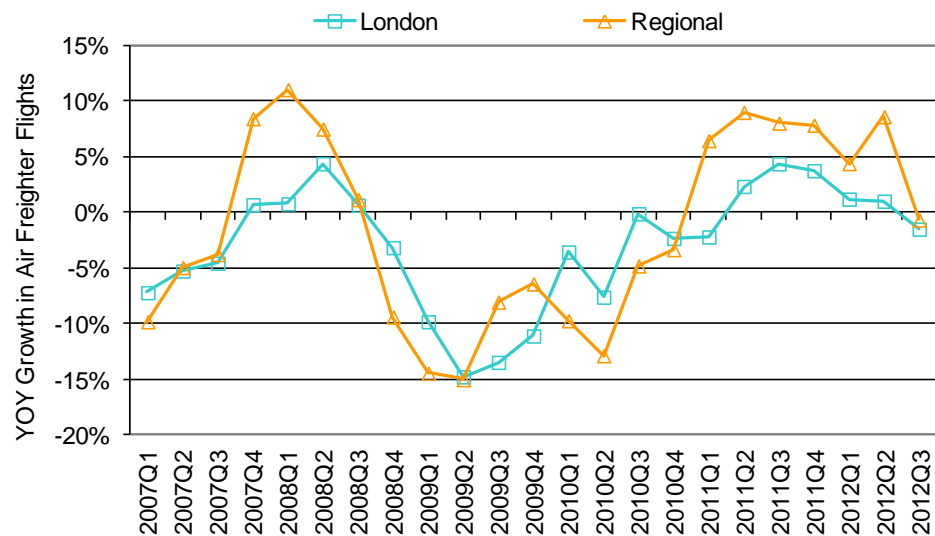
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2012		Q3 2011		+/- %	Q4 11 – Q3 12		Q4 10 – Q3 11		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
Air freighter	13.9	3%	14.0	3%	-0.9%	53.8	3%	51.8	3%	3.8%
- London	3.7	1%	3.7	1%	-1.5%	14.2	1%	14.1	1%	1.1%
- Regional	10.2	2%	10.3	2%	-0.7%	39.6	2%	37.7	2%	4.9%
Passenger flights	523.4	97%	534.0	97%	-2.0%	1,877.9	97%	1,895.9	97%	-1.0%
- London	266.8	50%	267.0	49%	-0.1%	974.0	50%	970.8	50%	0.3%
- Regional	256.6	48%	267.0	49%	-3.9%	903.9	47%	925.1	47%	-2.3%
Total flights	537.3	100%	548.0	100%	-2.0%	1,931.7	100%	1,947.7	100%	-0.8%
- London	270.5	50%	270.7	49%	-0.1%	988.2	51%	984.9	51%	0.3%
- Regional	266.8	50%	277.3	51%	-3.8%	943.5	49%	962.8	49%	-2.0%



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 3 2012, the total number of commercial flights in the UK was down 2.0% compared to the same quarter in 2011. The number of air freighter flights was down 0.9%, and that of passenger flights dropped by 2.0%.

London airports saw a decrease of 0.1% whereas regional airports experienced a drop of 3.8%. On a rolling year basis, the total number of flights was down 0.8%.



7. Punctuality of passenger flights to and from UK airports see note 6 on p.14

Matched flights (000s), % of flights on-time, average delay (mins)	CURRENT QUARTER						ROLLING YEAR					
	Q3 2012			Q3 2011			Q4 11 - Q3 12			Q4 10 - Q3 11		
	Flights (000s)	% on- time	Avg. delay (mins)	Flights (000s)	% on- time	Avg. delay (mins)	Flights (000s)	% on- time	Avg. delay (mins)	Flights (000s)	% on- time	Avg. delay (mins)
London Airports	262.6	79.5%	12.1	265.0	77.6%	12.6	963.5	79.4%	11.8	964.6	76.7%	13.8
-Heathrow	120.9	78.7%	12.2	122.3	76.6%	12.7	470.8	77.0%	12.8	467.0	74.9%	14.1
-Gatwick	70.9	75.3%	15.1	70.8	74.7%	14.9	240.1	79.1%	12.7	242.0	75.9%	15.5
-Stansted	34.4	84.3%	9.0	36.3	82.0%	9.9	121.0	84.3%	8.8	128.0	81.1%	10.8
-Luton	19.9	81.4%	11.6	20.0	77.6%	13.2	67.9	80.2%	11.9	68.1	74.9%	15.2
-London City	16.6	90.6%	5.4	15.6	88.5%	6.5	63.6	87.8%	6.9	59.5	85.8%	9.1
Regional Airports	130.5	80.2%	12.7	129.8	79.6%	12.9	449.6	81.0%	12.0	448.4	79.2%	13.9
-Manchester	46.2	75.9%	16.0	45.7	75.1%	15.7	154.9	76.1%	15.1	153.8	75.4%	16.3
-Birmingham	24.1	82.9%	10.9	23.6	82.4%	12.0	83.0	83.9%	10.4	82.9	81.7%	13.0
-Glasgow	20.2	81.7%	11.7	19.6	80.7%	12.6	71.0	83.3%	10.8	69.7	80.5%	13.4
-Edinburgh	27.4	82.2%	10.3	28.2	82.7%	10.0	98.7	83.1%	9.9	98.5	81.6%	11.7
-Newcastle	12.6	83.9%	11.2	12.9	82.0%	11.1	42.0	84.6%	10.3	43.5	80.4%	13.1
All 10 Airports	393.1	79.7%	12.3	394.9	78.3%	12.7	1,413.1	79.9%	11.8	1,413.0	77.5%	13.8

Punctuality of arriving and departing passenger flights are measured by comparing actual and planned times of operation. The data covers five London airports and five regional airports.

The on-time performance is defined as the proportion of flights arriving or departing early or up to 15 minutes late. It is calculated from the scheduled on-stand time, the reported runway time and the expected time an aircraft takes to travel between a stand and the runway.

In quarter 3 2012, 79.7% of all measured flights were on time, an improvement of 1.4 percentage points compared to the same quarter last year. Average delay per flight was 12.3 minutes. Nine out of ten airports where flight punctuality was measured showed an improvement in on-time performance compared to the same quarter in 2011.



Did you know? New data and charts made available in Aviation Trends

Since the first edition of Aviation Trends was published in the beginning of 2008, this quarterly publication has become popular among aviation enthusiasts. In this edition, new data and charts have been incorporated as a regular feature.

Part 1 Historical overview of traffic

Charts of quarterly volume and rolling annual totals of terminal passengers, commercial flights and cargo tonnage since quarter 1 1990 are included. The data for these charts is available at www.caa.co.uk/aviationtrends. These data series enable us to study how air traffic has evolved over the past two decades.

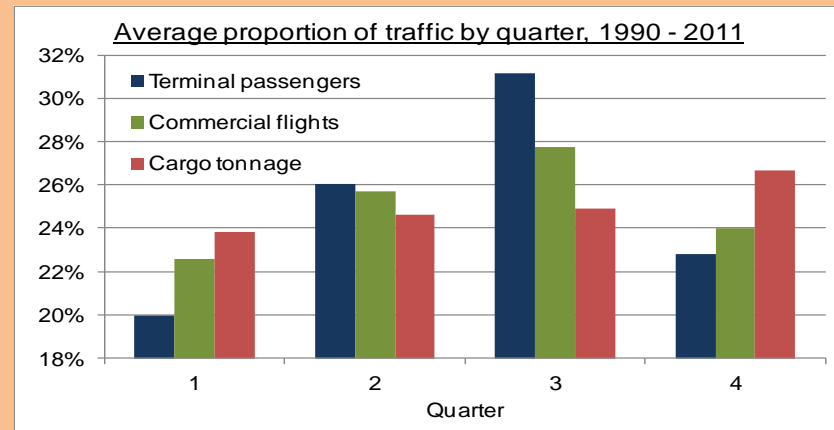
a) Development since the 2008/09 recession

The rolling annual totals show that, after peaking in 2007/08, air traffic volume decreased during 2009 and 2010. Following the fall in demand for air travel and the sluggish economic recovery, passenger airlines have actively engaged in yield management by controlling capacity. In quarter 3 2012, the number of terminal passengers and commercial flights were 9% and 15% below their peak respectively. Cargo tonnage saw a strong recovery in 2011, and was only 3% below its previous peak by quarter 3 2012.

	Terminal passengers	Commercial flights	Cargo tonnage
Historical peak	240.7 million	2.345 million	2.588 million
Achieved in	Quarter 1 2008	Quarter 4 2007	Quarter 2 2008
Traffic in Q3 2012	219.5 million	1.999 million	2.522 million
% of historical peak	91%	85%	97%

b) Seasonal pattern

In a typical year, both terminal passengers and commercial flights peak in quarter 3, and have their lowest volume in quarter 1. Compared to commercial flights, terminal passengers has a more pronounced seasonal pattern, with a higher proportion of traffic in quarter 3 and a lower proportion of traffic in quarter 1. Cargo tonnage across different quarters of a year is more uniform, and the highest proportion cargo tonnage transported usually falls in quarter 4.



Part 7 Punctuality of passenger flights

Punctuality of passenger flights to and from UK airports is incorporated in Part 7 of this edition. The statistics measure flights at five London airports (Heathrow, Gatwick, Stansted, Luton and London City) and five regional airports (Manchester, Birmingham, Glasgow, Edinburgh and Newcastle). The data for this table is available at 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. Explanatory notes for Parts 1 to 6:

Notes	Applicable to Part					
	1	2	3	4	5	6
Tables and charts are generated from data in CAA Airport Statistics.	√	√	√	√	√	√
All data excludes the activity of Air Taxis – those aircraft with maximum take-off weights of less than 15 tonnes flying non-scheduled services.	√	√	√	√	√	√
London airports are Heathrow, Gatwick, Stansted, Luton, London City and Southend. 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.	√	√	√	√	√	√
Exclude traffic to and from North Sea oilrigs.		√	√	√	√	√
Terminal passengers are those commencing their journey or connecting between flights at the airport, but exclude transit passengers who do not disembark.	√	√		√		
Cargo comprises mail and freight.	√				√	√
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.				√		
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.				√		

6. Explanatory notes for Part 7:

- In these punctuality data, 'delay' is recorded as the difference between an aircraft's scheduled and actual arrival or departure time at the airport terminal. It does not therefore measure any delay, such as that due to congestion, which has already been allowed for in the planned flight times of the service.
- Average delay is the total minutes of delay recorded by all flights (with early arriving flights counted as zero delay) divided by the total number of flights monitored.
- On-time performance and delay is calculated from the scheduled on-stand time (provided by Airport Co-ordination Ltd.), the reported runway time (provided by the airport) and the expected time an aircraft takes to travel between a stand and the runway (taxiing time – calculated from historic data). The use of average taxi times is sufficient for calculating an aggregate level of on-time performance, but would not be suitable for reviewing the punctuality of an individual flight.
- The statistics cover only those flights which were operated and do not cover those flights which were cancelled.