Aviation Trends

Quarter 1 2013

Civil Aviation Authority

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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. 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 presents interesting facts derived from the various data sources available to the CAA; this time we look at average maximum queuing times passengers thought reasonable at Heathrow, Gatwick and Stansted, and how their average perceived queuing times compare with these.

In this edition of Aviation Trends[1], we show a modest rise in the number of passenger and a decrease in the cargo tonnage and in the number of commercial flight handled at all UK airport, compared to the level in 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. Please note that historic numbers may be subject to minor change as the result of prior period adjustments[2]. Due to rounding of figures, there may be an apparent slight discrepancy between the sum of the constituent items and the total as shown.

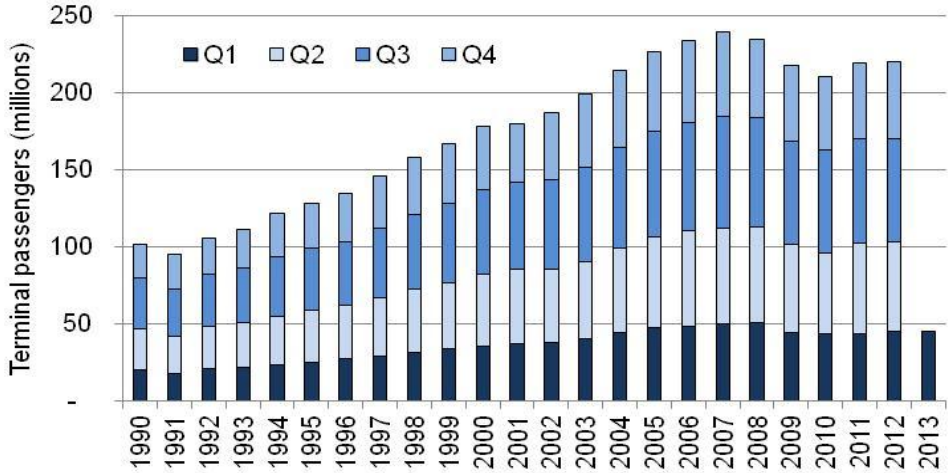
For a list of all statistics available on the CAA website, see www.caa.co.uk/statistics.

[1] Including traffic to and from North Sea oilrigs – in Part 1 "Historical overview of traffic"

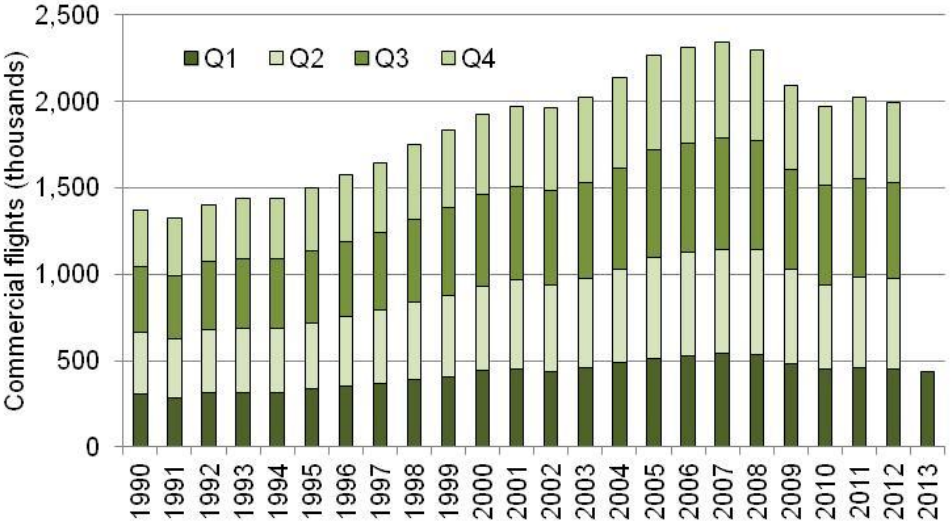
[2] Also, in editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. These islands are not formally part of the UK, and as we wish to present only the trends at UK airports, their figures are now excluded.

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

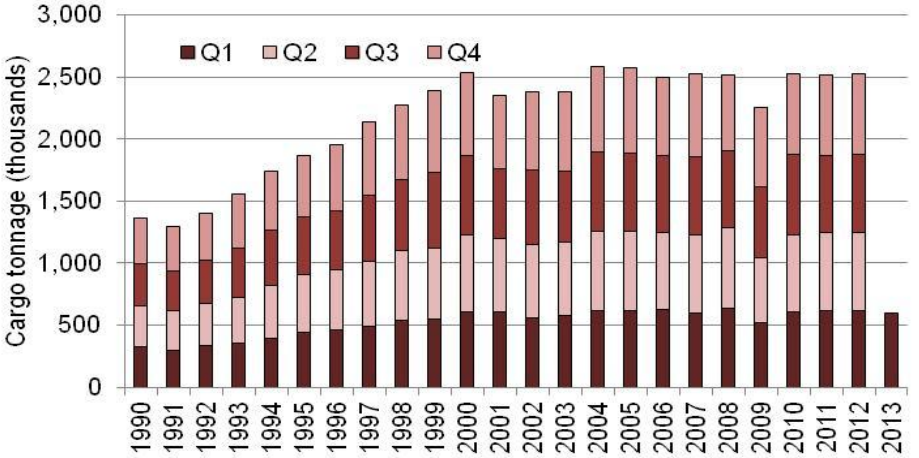
a. Terminal passengers



b. Commercial flights



c. Cargo tonnage



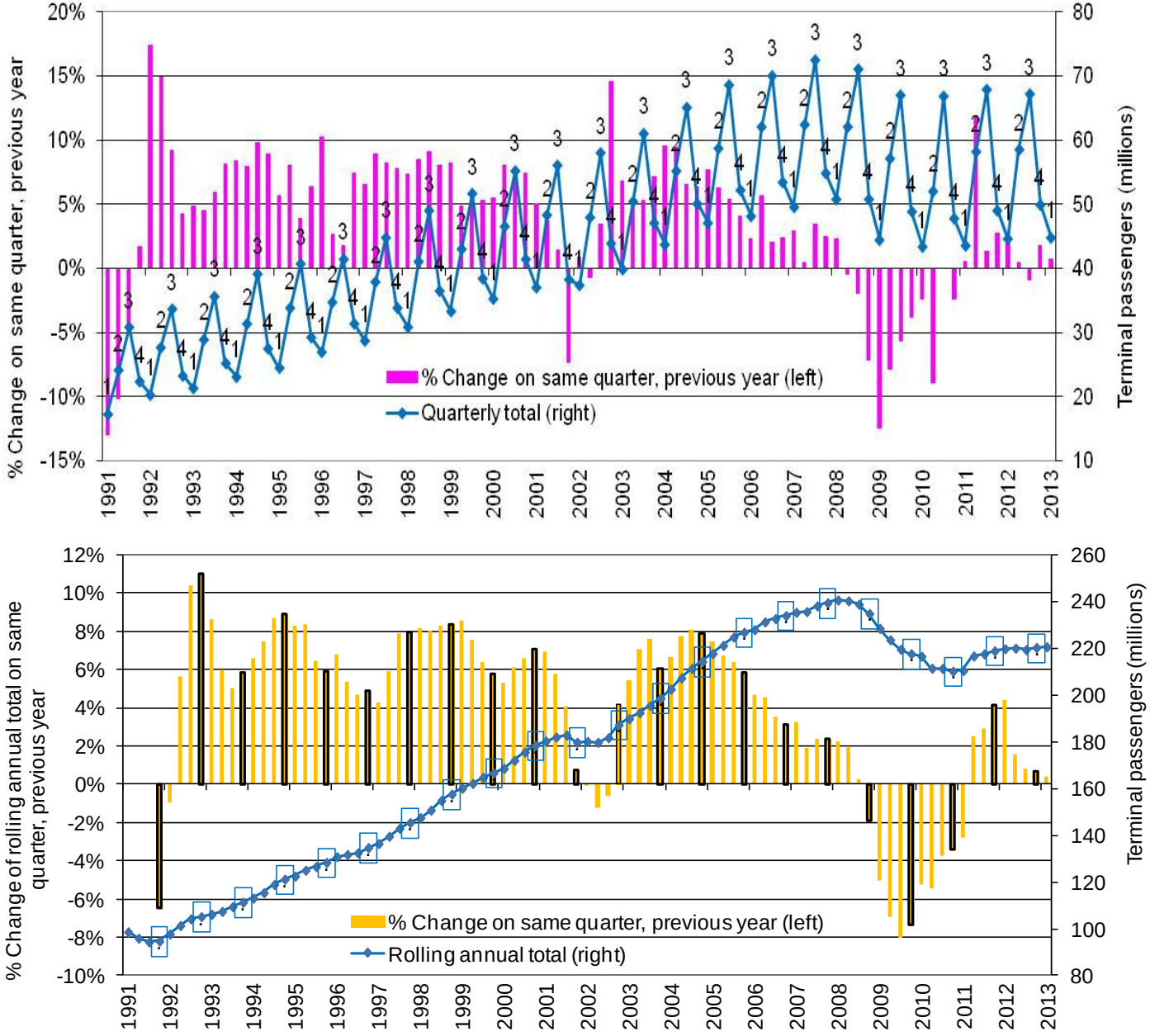
Plotting quarterly data of terminal passengers, commercial flights and cargo tonnage shows both seasonal and annual trends in UK aviation activity. These three time-series are shown on this page.

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).

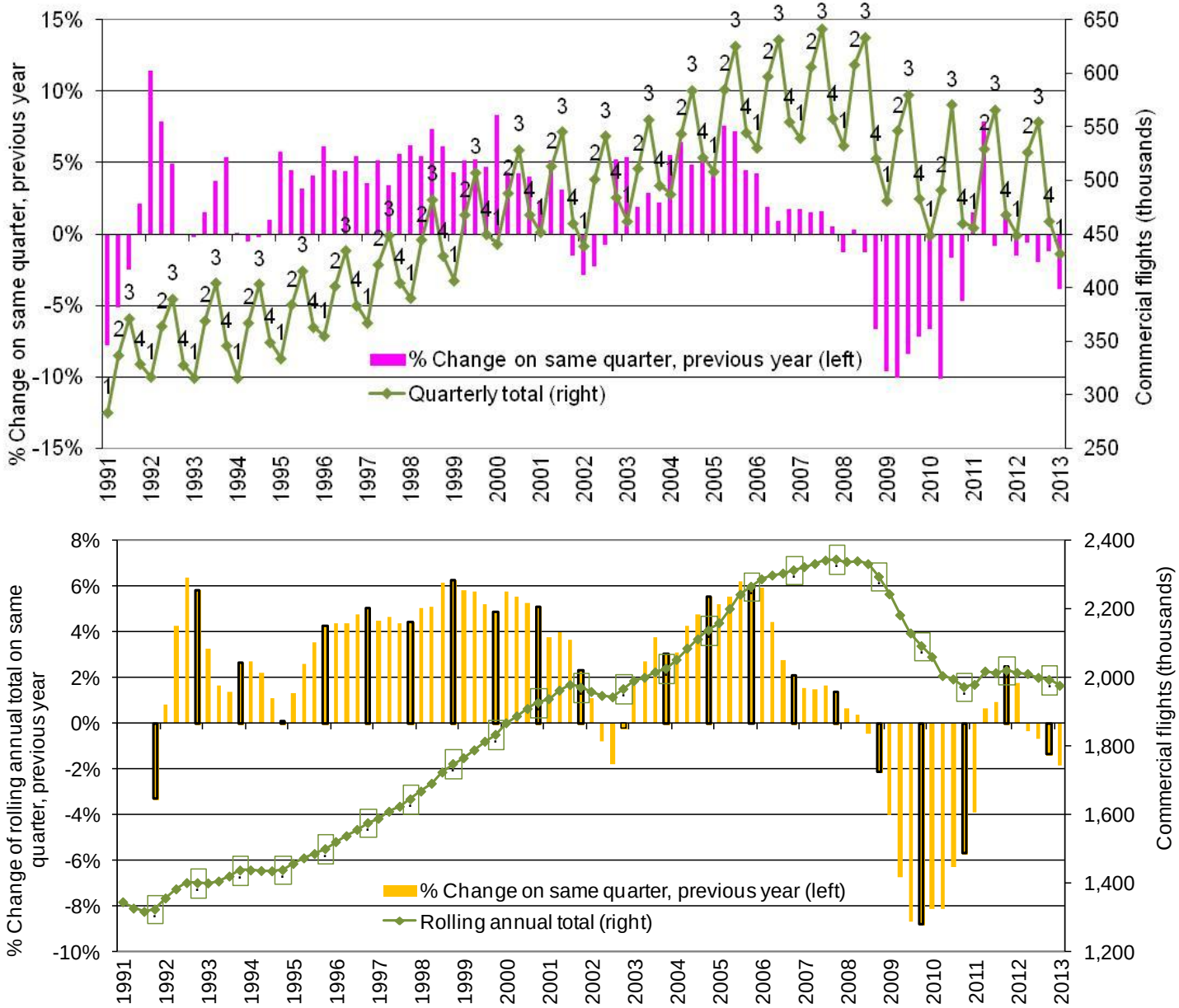
The second chart shows the rolling annual total in each quarter (on the right axis), and the percentage growth of the rolling annual total on the previous year's number in the same quarter (on the left axis). The highlighted data points are the annual traffic volumes and growth rates of the respective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

In quarter 1 2013, UK airports handled 44.9 million terminal passengers (an increase of 0.7%), 432 thousand commercial flights (a fall of 3.9%), and 598 thousand tonnes of cargo (a fall of 3.0%) compared to the same quarter last year.

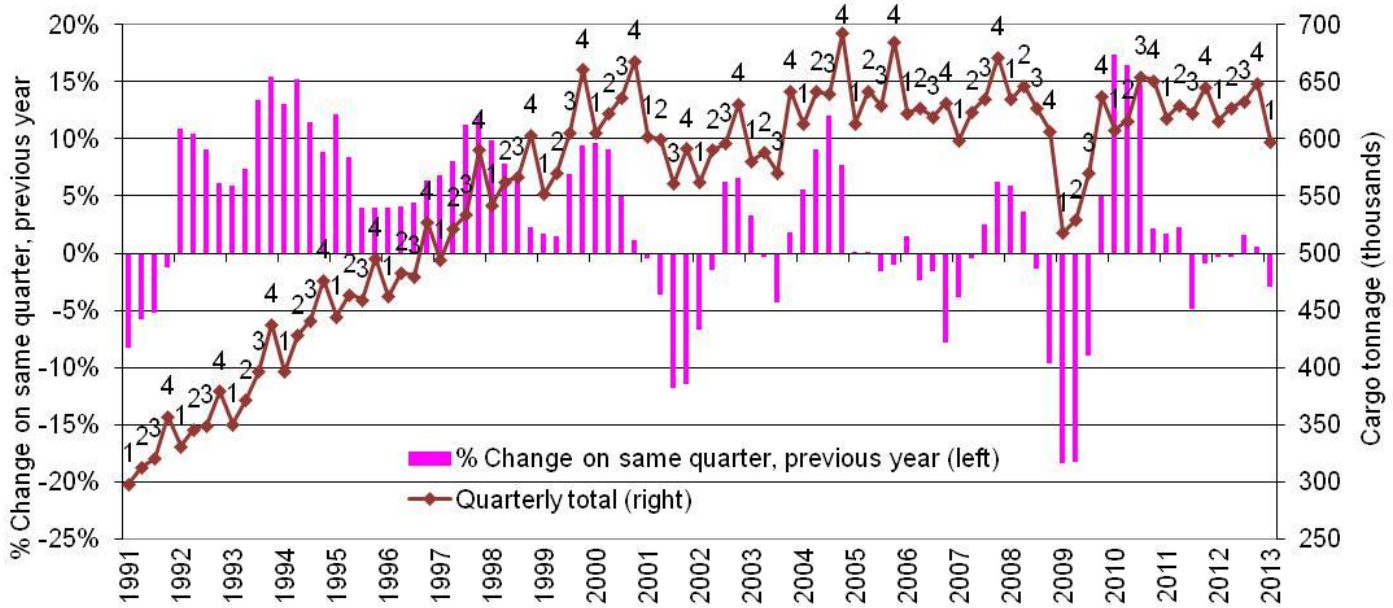
a. Terminal passengers

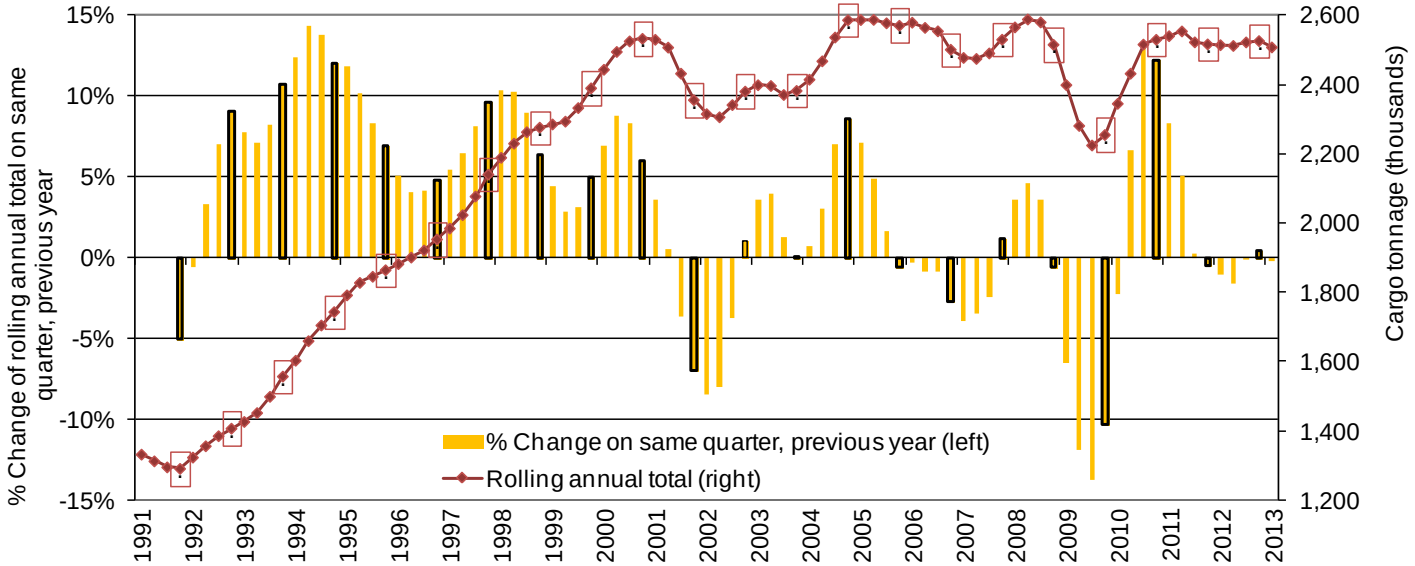


b. Commercial flights



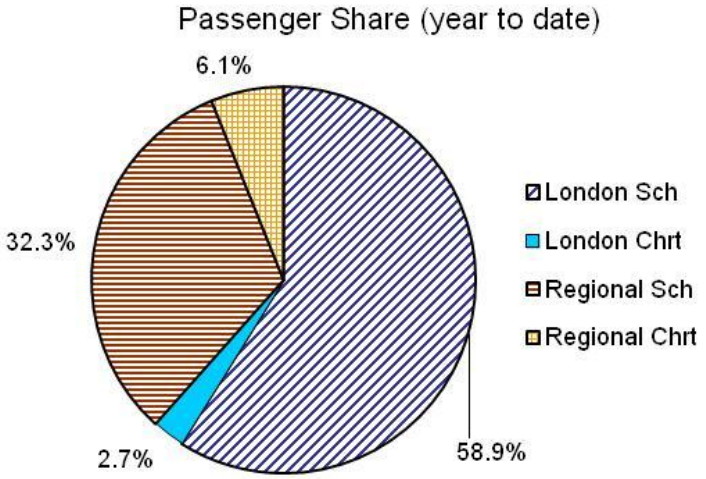
c. Cargo tonnage





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

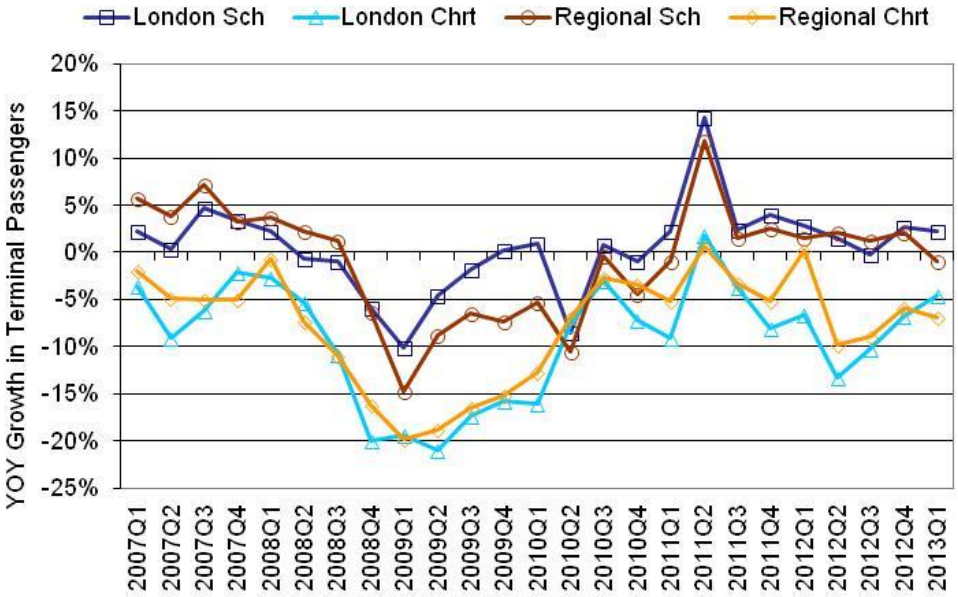
Passengers (Millions)	CURRENT QUARTER Q1 2013 Pax (Millions)	% of total	Q1 2012 Pax (Millions)	% of total	+/- %	ROLLING YEAR Q2 12 – Q1 13 Pax (Millions)	% of total	Q2 11 – Q1 12 Pax (Millions)	% of total	+/- %
London Airports	**29.1**	**65%**	**28.5**	**64%**	**2.0%**	**135.5**	**62%**	**134.3**	**61%**	**0.9%**
- Scheduled	28.1	63%	27.5	62%	2.3%	129.5	59%	127.7	58%	1.4%
- Charter	0.9	2%	1.0	2%	-4.6%	5.9	3%	6.6	3%	-9.7%
Regional Airports	**15.7**	**35%**	**15.9**	**36%**	**-1.6%**	**84.5**	**38%**	**84.8**	**39%**	**-0.4%**
- Scheduled	13.9	31%	14.0	32%	-0.9%	71.0	32%	70.1	32%	1.3%
- Charter	1.8	4%	1.9	4%	-6.9%	13.4	6%	14.7	7%	-8.4%
All Airports	**44.7**	**100%**	**44.4**	**100%**	**0.7%**	**219.9**	**100%**	**219.1**	**100%**	**0.4%**
- Scheduled	42.0	94%	41.5	94%	1.2%	200.6	91%	197.8	90%	1.4%
- Charter	2.7	6%	2.9	6%	-6.1%	19.4	9%	21.3	10%	-8.8%



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 onboard aircraft which land at a UK airport and then continue on to another destination.

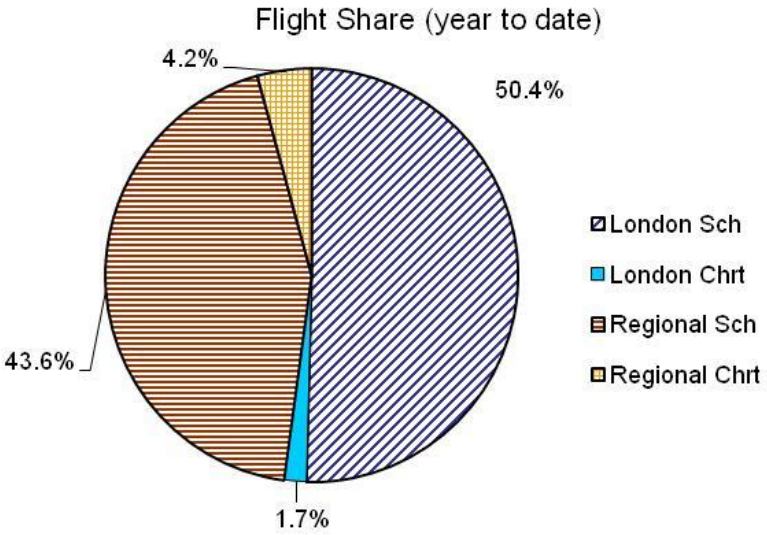
In quarter 1 2013, compared to the same quarter last year, London airports handled 2.0% more passengers, and regional airports saw a decrease of 1.6%. On a rolling year basis, passenger numbers were 0.9% higher at London airports, and 0.4% lower at regional airports than the year before.

Across all UK airports, the number of passengers on scheduled flights was up 1.2% and down 6.1% on charter flights compared with the same quarter in 2012.



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

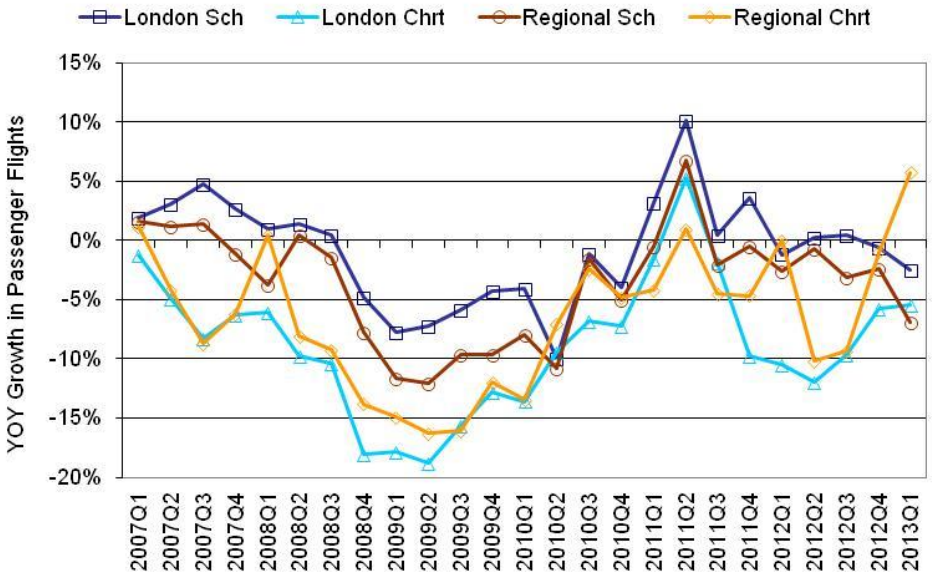
Number of flights (000s)	CURRENT QUARTER Q1 2013 Flights (000s)	% of total	Q1 2012 Flights (000s)	% of total	+/- %	ROLLING YEAR Q2 12 – Q1 13 Flights (000s)	% of total	Q2 11 – Q1 12 Flights (000s)	% of total	+/- %
London Airports	**218.5**	**54%**	**224.2**	**53%**	**-2.5%**	**966.5**	**52%**	**974.7**	**51%**	**-0.8%**
- Scheduled	213.3	53%	218.7	52%	-2.5%	934.3	50%	939.3	50%	-0.5%
- Charter	5.2	1%	5.5	1%	-5.4%	32.2	2%	35.4	2%	-9.0%
Regional Airports	**184.0**	**46%**	**195.9**	**47%**	**-6.1%**	**887.3**	**48%**	**918.4**	**49%**	**-3.4%**
- Scheduled	171.2	43%	183.8	44%	-6.9%	808.7	44%	834.9	44%	-3.1%
- Charter	12.8	3%	12.1	3%	5.8%	78.6	4%	83.5	4%	-5.9%
All Airports	**402.5**	**100%**	**420.1**	**100%**	**-4.2%**	**1,853.8**	**100%**	**1,893.1**	**100%**	**-2.1%**
- Scheduled	384.5	96%	402.5	96%	-4.5%	1,743.0	94%	1,774.2	94%	-1.8%
- Charter	18.0	4%	17.6	4%	2.3%	110.8	6%	118.9	6%	-6.8%



The figures in this table are for commercial passenger flights and thus exclude air freighter flights (exclusively carrying cargo).

Compared to quarter 1 2012, the number of passenger flights at all UK airports decreased by 4.2% in quarter 1 2013. There were 4.5% fewer scheduled flights and 2.3% more charter flights. On the rolling year basis, the numbers of scheduled and charter flights were down 1.8% and 6.8% respectively.

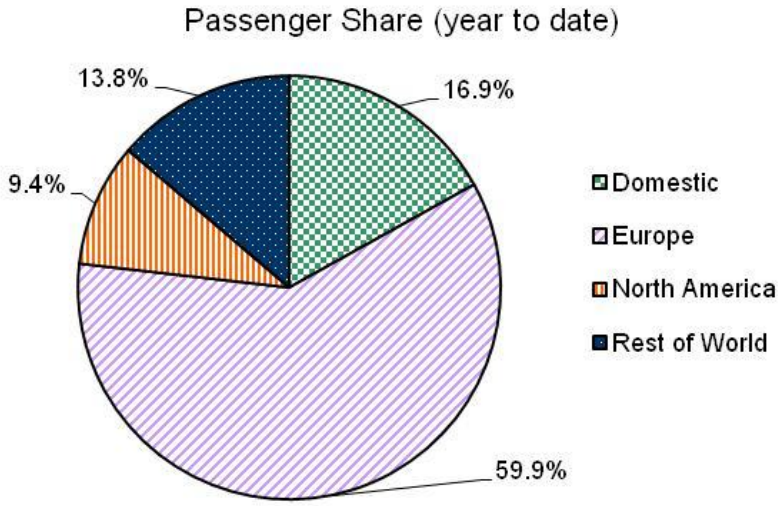
There were 2.5% fewer flights at London airports and 6.1% fewer flights at regional airports in quarter 1 2013 than in the same period in 2012. On the rolling year basis, the number of flights was down 0.8% at London airports, and decreased by 3.4% at regional airports.



4. Terminal passengers at UK airports by origin / destination

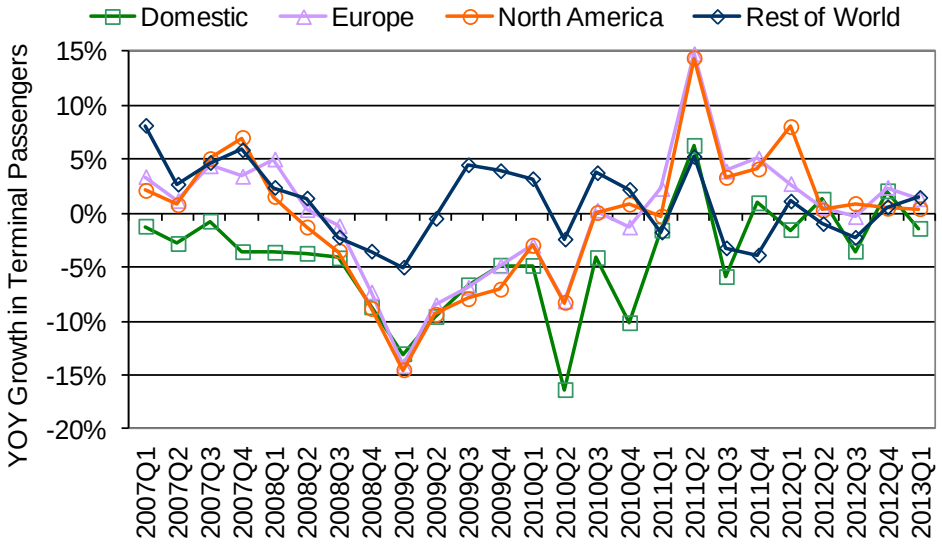
see note 5 on p.14

Passengers (millions)	CURRENT QUARTER Q1 2013 Pax (millions)	% of total	Q1 2012 Pax (millions)	% of total	+/- %	ROLLING YEAR Q2 12 – Q1 13 Pax (millions)	% of total	Q2 11 – Q1 12 Pax (millions)	% of total	+/- %
Domestic	**8.3**	**19%**	**8.5**	**19%**	**-1.4%**	**37.2**	**17%**	**37.4**	**17%**	**-0.5%**
- Scheduled	8.2	18%	8.4	19%	-1.8%	36.8	17%	37.0	17%	-0.6%
- Charter	0.1	0.3%	0.1	0.2%	30.1%	0.4	0.2%	0.4	0.2%	17.5%
Europe	**24.7**	**55%**	**24.4**	**55%**	**1.3%**	**131.7**	**60%**	**130.7**	**60%**	**0.8%**
- Scheduled	22.9	51%	22.4	50%	2.2%	116.2	53%	113.4	52%	2.5%
- Charter	1.8	4%	2.0	5%	-8.5%	15.5	7%	17.3	8%	-10.2%
North America	**4.0**	**9%**	**4.0**	**9%**	**0.4%**	**20.7**	**9%**	**20.6**	**9%**	**0.5%**
- Scheduled	4.0	9%	4.0	9%	0.3%	20.3	9%	20.2	9%	0.7%
- Charter	0.0	0.0%	0.0	0.0%	16.9%	0.4	0.2%	0.4	0.2%	-9.0%
Rest of World	**7.6**	**17%**	**7.5**	**17%**	**1.4%**	**30.3**	**14%**	**30.4**	**14%**	**-0.3%**
- Scheduled	6.9	15%	6.8	15%	2.1%	27.2	12%	27.2	12%	0.1%
- Charter	0.7	2%	0.8	2%	-4.5%	3.1	1%	3.2	1%	-4.1%
Total	**44.7**	**100%**	**44.4**	**100%**	**0.7%**	**219.9**	**100%**	**219.1**	**100%**	**0.4%**
- Scheduled	42.0	94%	41.5	94%	1.2%	200.6	91%	197.8	90%	1.4%
- Charter	2.7	6%	2.9	6%	-6.1%	19.4	9%	21.3	10%	-8.8%



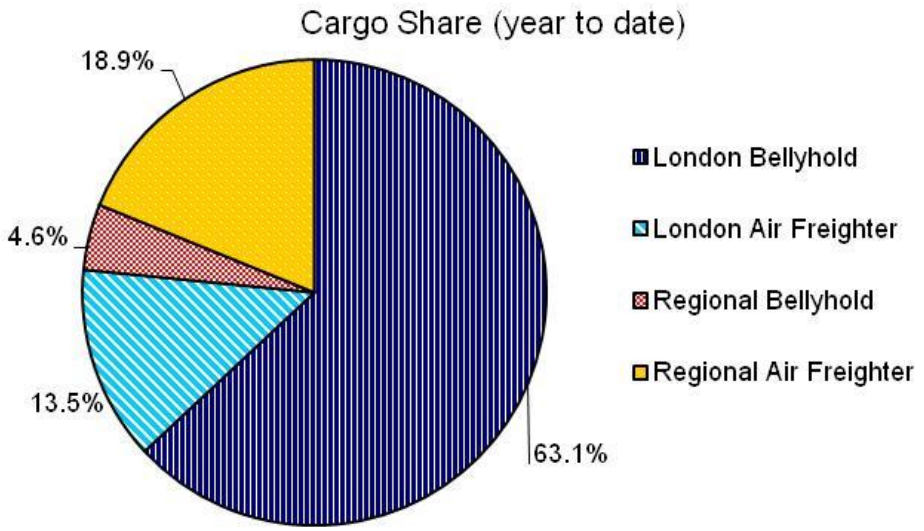
Compared to the same quarter last year, in quarter 1 2013, there have been increases in the number of passengers travelling to and from North America (0.4%), Europe (1.3%) and Rest of the world (1.4%) whereas there have been a decrease in the number of passengers travelling to and from domestic destinations (-1.4%).

On the rolling year basis, the total number of passengers was up 0.4%. The numbers of passengers travelling to and from Europe and North America rose by 0.8% and 0.5% respectively, whereas domestic destinations and Rest of the world saw a decrease of 0.5% and 0.3% respectively.



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

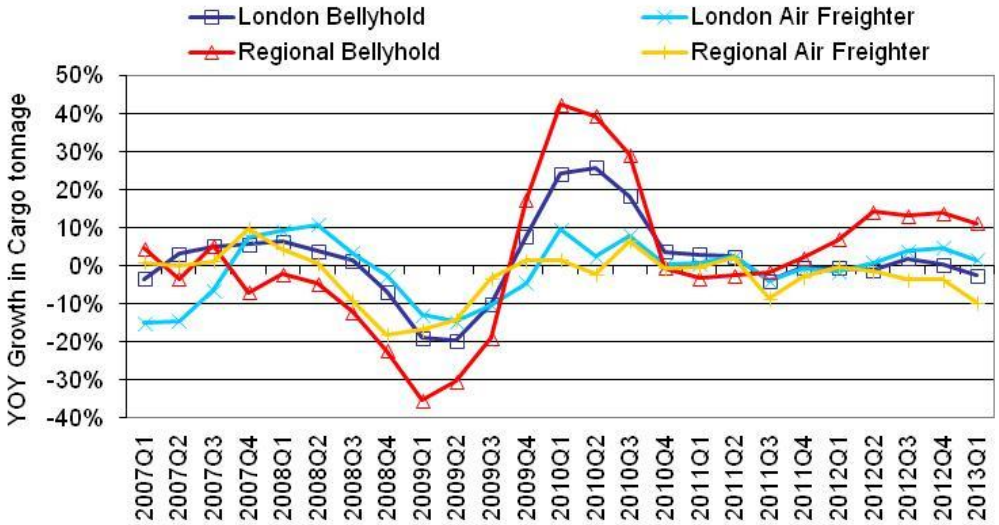
Tonnes (000s)	CURRENT QUARTER Q1 2013 Tonnes (000s)	% of total	Q1 2012 Tonnes (000s)	% of total	+/- %	ROLLING YEAR Q2 12 – Q1 13 Tonnes (000s)	% of total	Q2 11 – Q1 12 Tonnes (000s)	% of total	+/- %
Cargo on cargo only flights	**192.7**	**32%**	**203.4**	**33%**	**-5.2%**	**811.0**	**32%**	**824.4**	**33%**	**-1.6%**
- London	81.9	14%	80.6	13%	1.6%	338.3	13%	329.1	13%	2.8%
- Regional	110.8	19%	122.7	20%	-9.7%	472.7	19%	495.3	20%	-4.6%
Bellyhold cargo	**405.1**	**68%**	**412.5**	**67%**	**-1.8%**	**1,695.2**	**68%**	**1,687.9**	**67%**	**0.4%**
- London	377.6	63%	387.8	63%	-2.6%	1,580.6	63%	1,586.6	63%	-0.4%
- Regional	27.5	5%	24.7	4%	11.2%	114.5	5%	101.2	4%	13.2%
Total cargo	**597.8**	**100%**	**615.8**	**100%**	**-2.9%**	**2,506.2**	**100%**	**2,512.3**	**100%**	**-0.2%**
- London	459.5	77%	468.4	76%	-1.9%	1,918.9	77%	1,915.8	76%	0.2%
- Regional	138.2	23%	147.4	24%	-6.2%	587.2	23%	596.5	24%	-1.5%



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

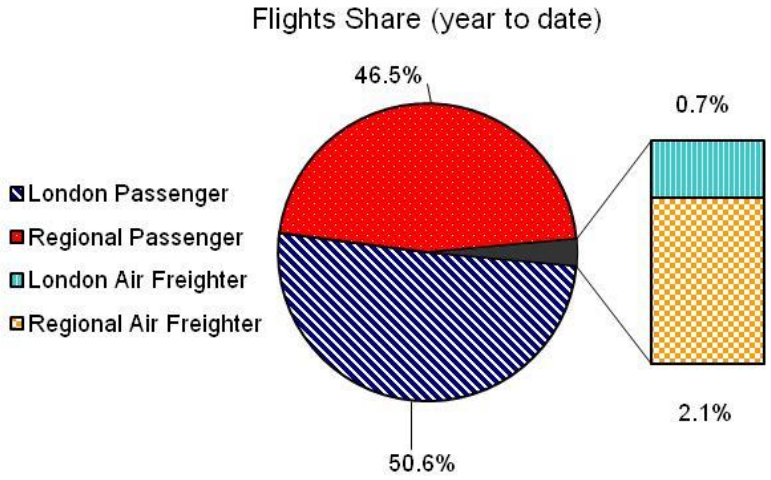
Compared to the same period in 2012, in quarter 1 2013, total cargo tonnage at all UK airports was down 2.9%. It decreased by 1.9% at London airports and by 6.2% at Regional airports. Air freighter cargo tonnage dropped by 5.2% and bellyhold cargo tonnage by 1.8% compared with the same quarter last year.

On a rolling year basis, total cargo tonnage handled at UK airports was down 0.2% compared with the year before.



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

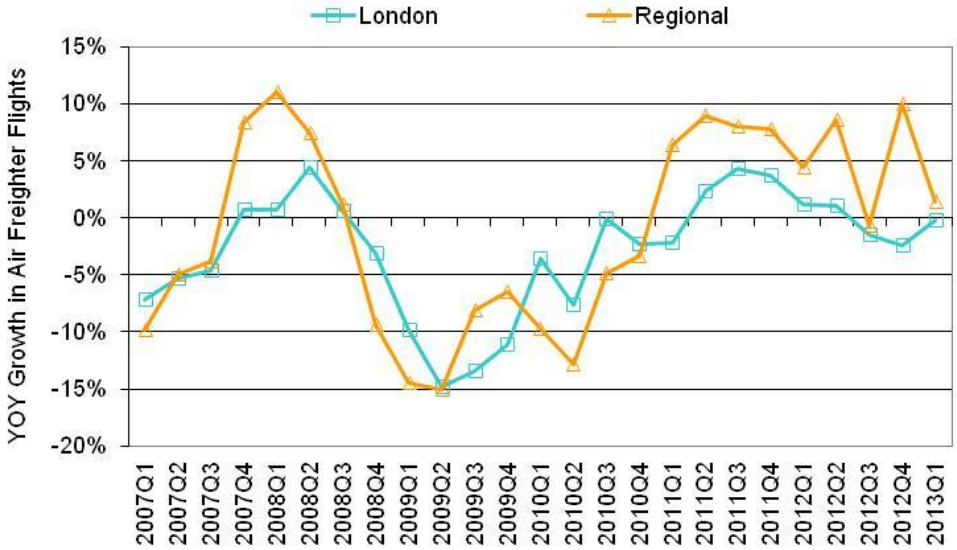
Flights (000s)	CURRENT QUARTER Q1 2013 Flights (000s)	% of total	Q1 2012 Flights (000s)	% of total	+/- %	ROLLING YEAR Q2 12 – Q1 13 Flights (000s)	% of total	Q2 11 – Q1 12 Flights (000s)	% of total	+/- %
Air freighter	**13.2**	**3%**	**13.1**	**3%**	**1.0%**	**54.8**	**3%**	**53.1**	**3%**	**3.2%**
- London	3.5	1%	3.5	1%	-0.2%	14.1	1%	14.2	1%	-0.8%
- Regional	9.7	2%	9.6	2%	1.4%	40.7	2%	38.9	2%	4.7%
Passenger flights	**402.5**	**97%**	**420.1**	**97%**	**-4.2%**	**1,853.8**	**97%**	**1,893.1**	**97%**	**-2.1%**
- London	218.5	53%	224.2	52%	-2.5%	966.5	51%	974.7	50%	-0.8%
- Regional	184.0	44%	195.9	45%	-6.1%	887.3	46%	918.4	47%	-3.4%
Total flights	**415.7**	**100%**	**433.2**	**100%**	**-4.0%**	**1,908.6**	**100%**	**1,946.2**	**100%**	**-1.9%**
- London	222.0	53%	227.7	53%	-2.5%	980.6	51%	988.9	51%	-0.8%
- Regional	193.7	47%	205.5	47%	-5.7%	928.0	49%	957.3	49%	-3.1%



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 1 2013, the total number of commercial flights in the UK was down 4.0% compared to the same quarter in 2012. The number of air freighter flights increased by 1.0%, and that of passenger flights dropped by 4.2%.

London airports saw a decrease of 2.5% whereas regional airports experienced a drop of 5.7%. On a rolling year basis, the total number of flights was down 1.9% compared with the same period the year before.



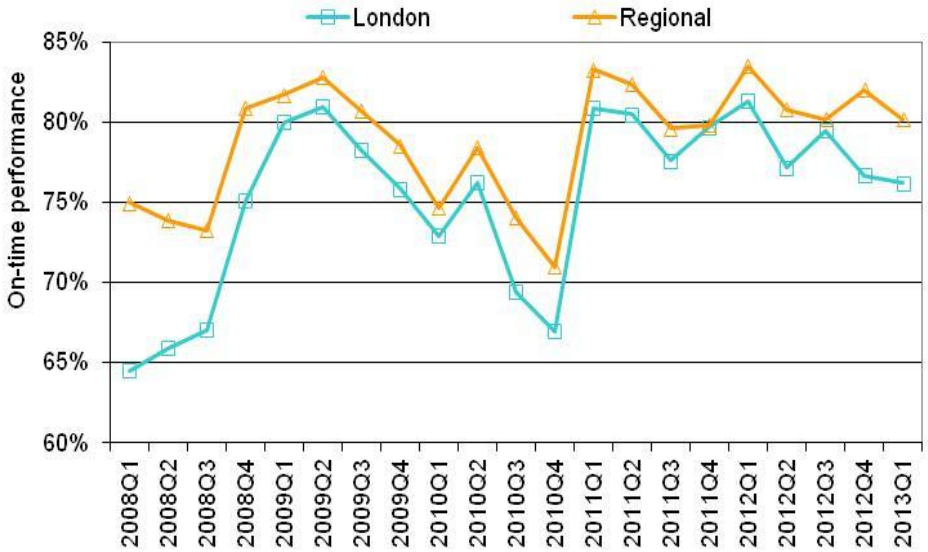
7. Punctuality of passenger flights to and from UK airports see note 6 on p.14

Matched flights (000s), % of flights on-time, average delay (mins)	CURRENT QUARTER Q1 2013			CURRENT QUARTER Q1 2012			ROLLING YEAR Q2 12 – Q1 13			ROLLING YEAR Q2 11 – Q1 12		
	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	**215.7**	**76.2%**	**13.9**	**222.9**	**81.3%**	**11.1**	**952.8**	**77.5%**	**12.9**	**968.3**	**79.7%**	**11.5**
- Heathrow	110.9	73.6%	15.0	115.1	79.2%	12.2	464.0	74.9%	14.0	472.9	77.8%	12.3
- Gatwick	49.1	76.0%	14.7	51.4	82.7%	11.0	236.9	76.4%	14.1	241.0	79.4%	12.4
- Stansted	26.1	80.1%	11.3	26.6	84.0%	9.0	120.2	82.5%	9.9	124.6	84.3%	8.8
- Luton	13.6	78.9%	12.5	14.0	82.3%	10.6	67.4	79.8%	12.2	67.7	78.6%	12.5
- London City	15.9	86.1%	8.2	16.0	87.4%	7.1	64.2	87.8%	7.1	62.2	87.5%	7.1
Regional Airports	**92.2**	**80.2%**	**12.3**	**97.9**	**83.5%**	**10.4**	**446.8**	**80.8%**	**12.1**	**449.9**	**81.2%**	**11.7**
- Manchester	32.5	75.6%	14.7	34.0	78.1%	13.1	156.9	76.7%	14.8	156.5	76.6%	14.5
- Birmingham	16.5	81.4%	12.4	17.8	86.0%	9.5	81.8	83.0%	10.9	82.1	84.4%	10.3
- Glasgow	15.0	83.9%	10.2	15.5	87.0%	9.0	71.1	82.7%	11.0	69.2	83.4%	10.9
- Edinburgh	19.8	84.6%	9.2	22.0	85.9%	8.5	95.4	83.7%	9.6	99.6	83.5%	9.7
- Newcastle	8.3	78.2%	14.4	8.6	87.4%	8.1	41.6	82.0%	12.0	42.5	83.7%	10.3
All 10 Airports	**307.9**	**77.4%**	**13.4**	**320.9**	**82.0%**	**10.9**	**1,399.6**	**78.5%**	**12.6**	**1,418.2**	**80.2%**	**11.6**

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 1 2013, 77.4% of all measured flights were on time, which was down 4.6 percentage points compared to the same quarter last year. Average delay per flight was 13.4 minutes, compared with 10.9 minutes in quarter 1 2012. Across all the London and regional airports, the percentage of on-time flights dropped and the average delay increased.



Did you know? Perceived queuing times at Heathrow, Gatwick and Stansted

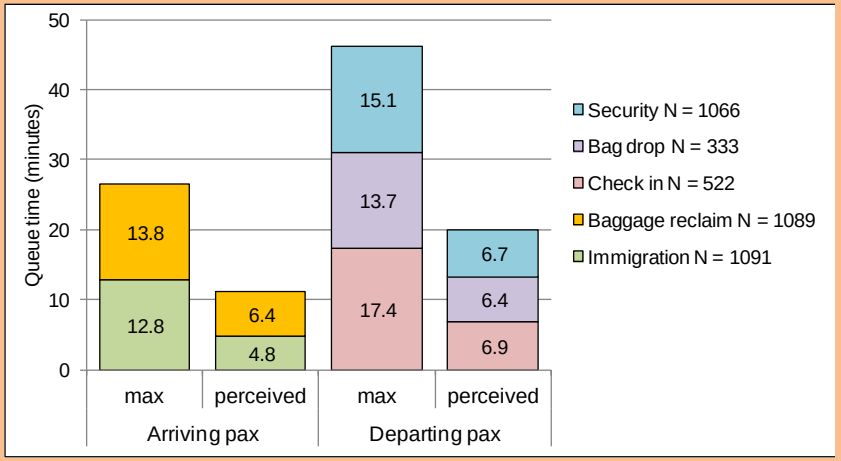
To help inform the CAA's initial proposals for economic regulation of airports for the period from April 2014, the CAA undertook research at Heathrow, Gatwick and Stansted to study passengers' airport experience. Over 2,800 passengers were invited to give their views on their how satisfied they were with various airport services, the time they spent in queuing, and areas of improvement they would like to see at the airport.

Queuing times for the following processes were studied. Passengers were asked their opinion on reasonable queue times, and how their perceived experience compared with these.

Arriving passengers	Immigration, baggage reclaim
Departing passengers	Check-in, bag drop, security
Connecting passengers	Security

The chart on the right shows the average maximum reasonable queuing times and average perceived queuing times (in minutes) for all arriving and departing respondents at Heathrow, Gatwick and Stansted. For departing passengers, the number of responses is larger for security than those for check in and bag drop, because some passengers checked-in online before arriving at the airport, and some carried only hand luggage and did not need to go through bag drop.

Average maximum reasonable vs average perceived queuing times, arriving and departing passengers



Note: N = weighted sample sizes.

Observations:

1. Average perceived queuing times for all processes were shorter than average maximum reasonable queue times.
2. Average total perceived queuing times were just over 11 minutes for arriving and connecting passengers, and 20 minutes for departing passengers.

The full research report, titled CAA passenger research: satisfaction with the airport experience, Heathrow, Gatwick and Stansted, is available at http://www.caa.co.uk/cap1044.

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.