

Aviation Trends

Quarter 4 2014



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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 presents interesting facts derived from the various data sources available to the CAA.

In this edition of Aviation Trends, we highlight the punctuality statistics for passenger flights in 2014, recently published on the CAA website. The statistics shown in the 'Did you know?' section covers the ten airports for which 2014 punctuality data is available but also highlights the recent expansion in the number of airports covered as well as developments that are planned over the course of 2015.

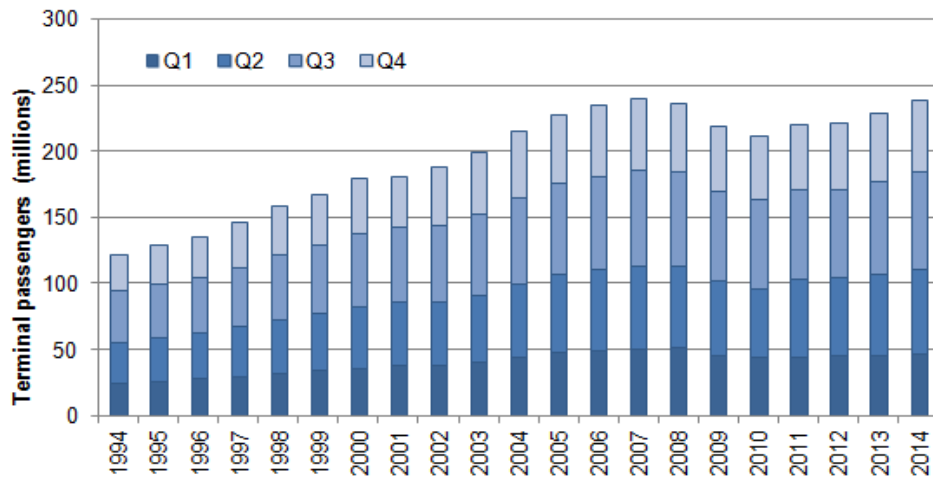
The Aviation Trends series is available at www.caa.co.uk/aviationtrends, part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications. Please note that historic numbers may be subject to minor change as the result of prior period adjustments.¹ Due to 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.

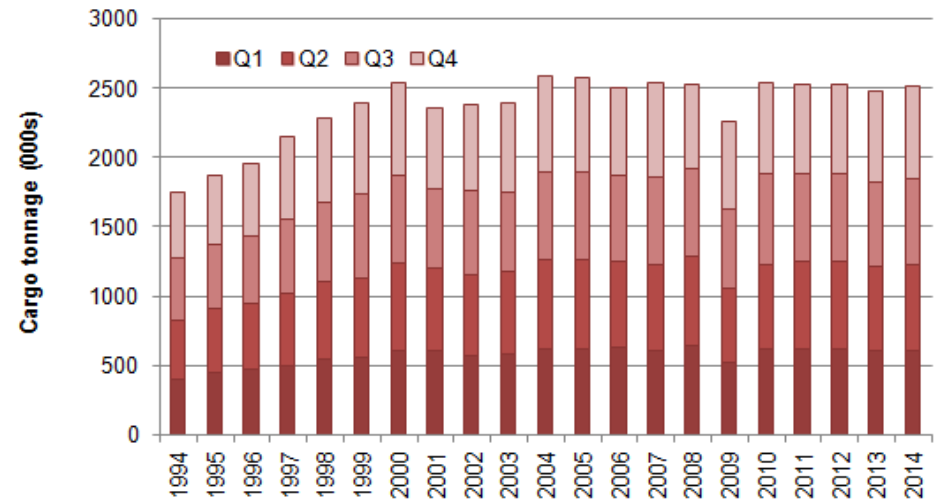
¹ Also, in editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. These islands are not formally part of the UK, and as we wish to present only the trends at UK airports, their figures are now excluded.

1. Historical overview of traffic see note 5 on p.15

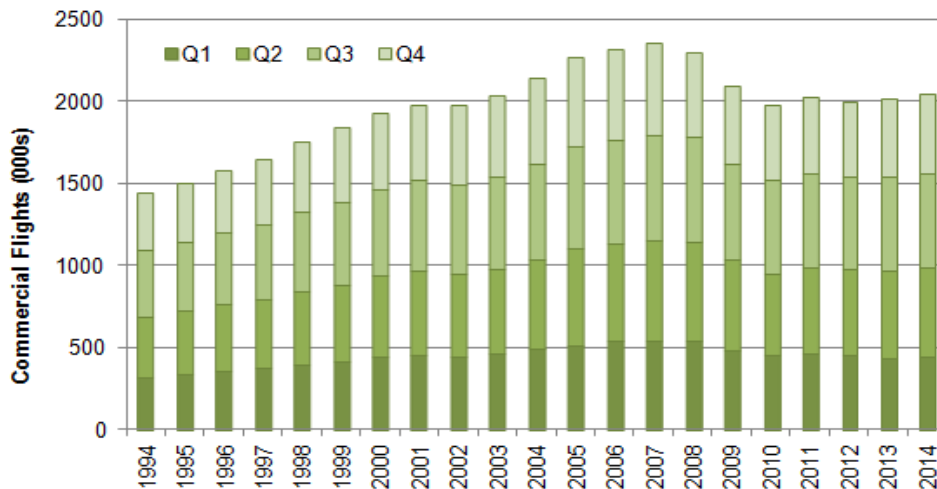
a. Terminal passengers



b. Cargo tonnage



c. Commercial flights



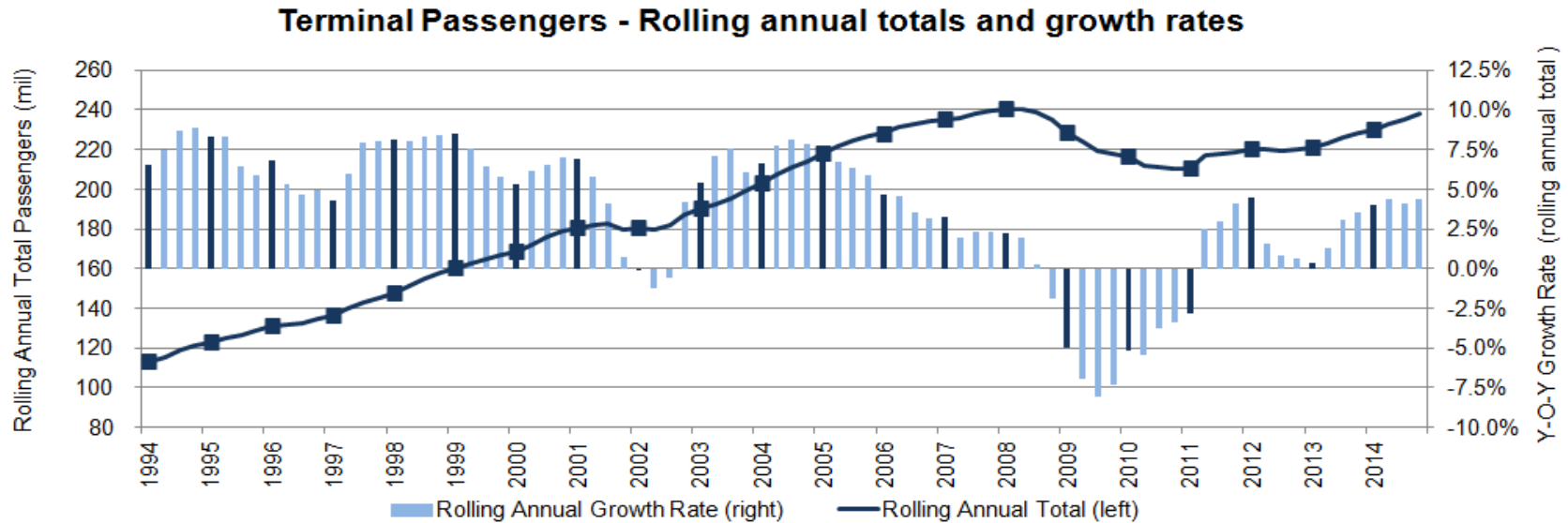
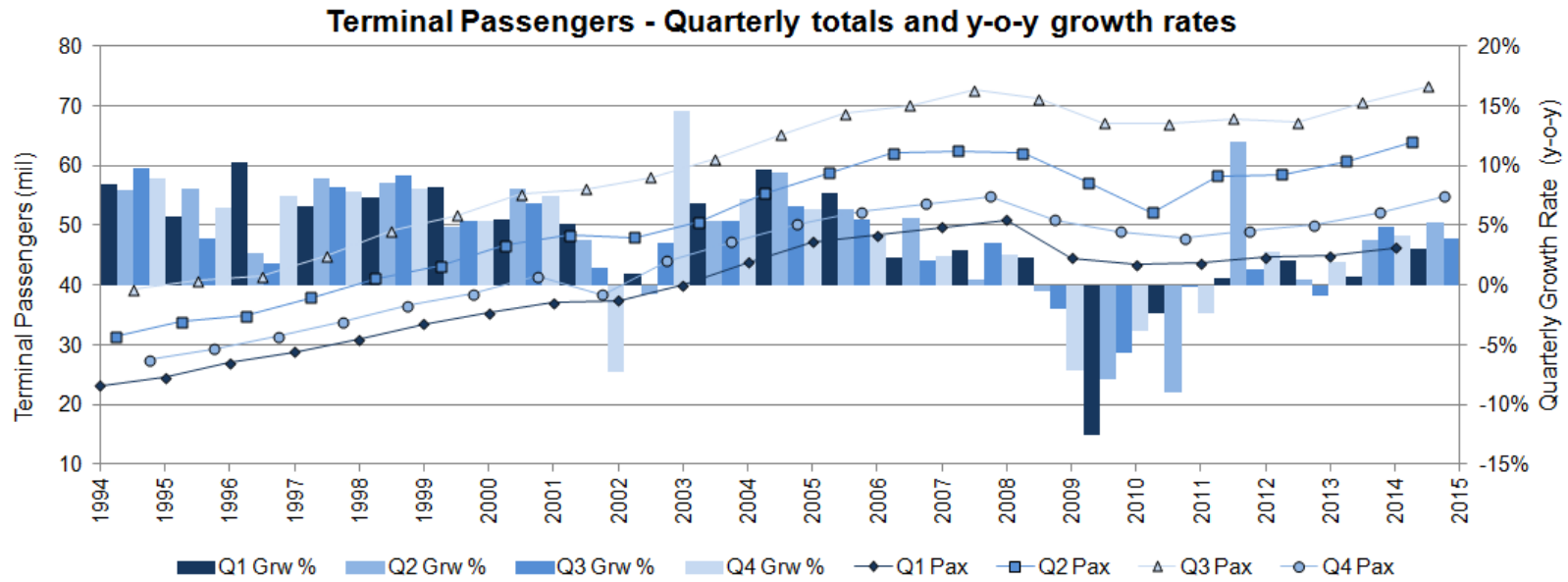
The three time-series charts on this page show both seasonal and annual trends in UK aviation activity in terms of terminal passengers, commercial flights and cargo tonnage.

On pages 4 to 6, the top charts show traffic volume in each quarter (left axis), and the corresponding year-on-year quarterly growth rates (right axis). The bottom charts show the rolling annual total traffic in each quarter (left axis), and the year-on-year percentage growth of the rolling annual total (right axis). The highlighted data points indicate the annual traffic volumes and growth rates of the respective calendar years.

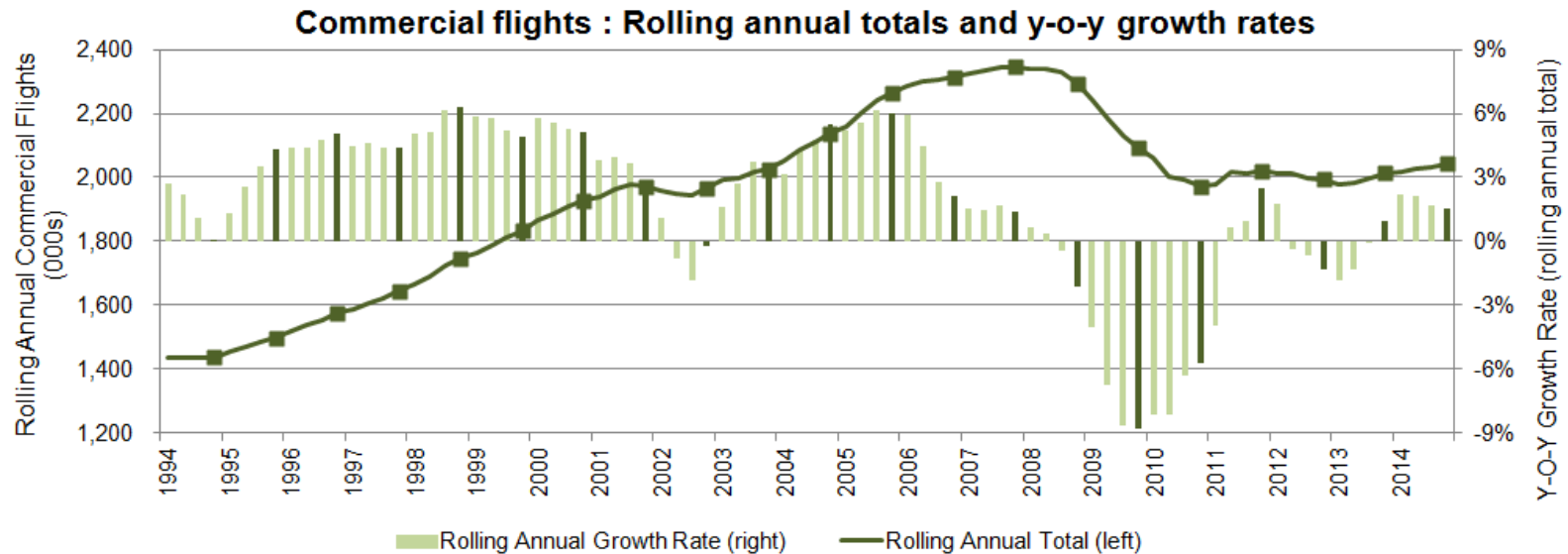
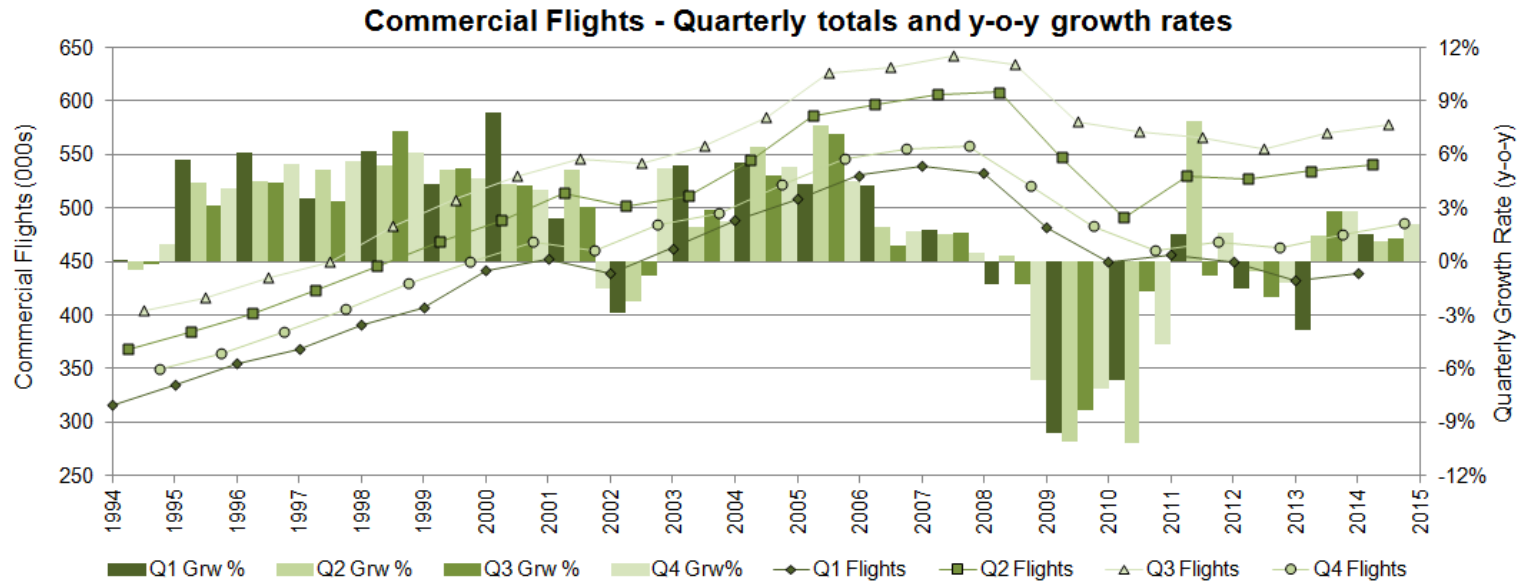
In Q4 2014, UK airports handled 54.8 terminal passengers, 485 thousand commercial flights, and 668 thousand tonnes of cargo, increases of 5.3%, 2.1% and 2.6% respectively, compared to the same quarter last year².

² These figures include traffic to and from North Sea oil rigs, which are excluded from the detailed tables in Parts 2 – 6.

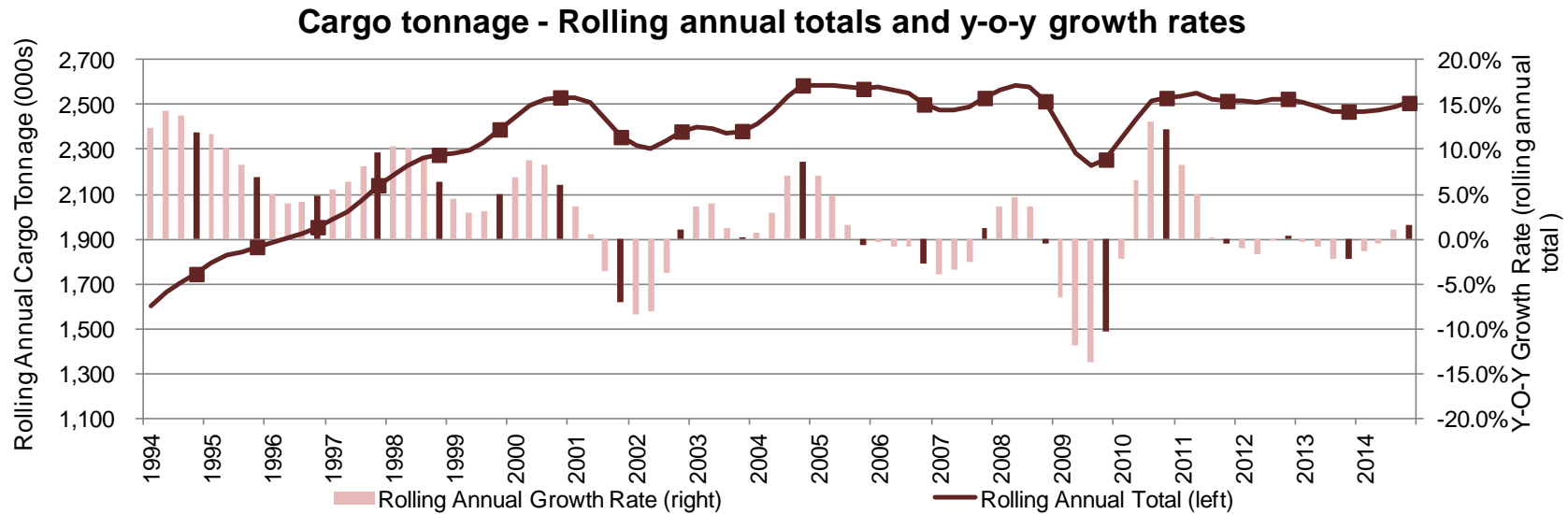
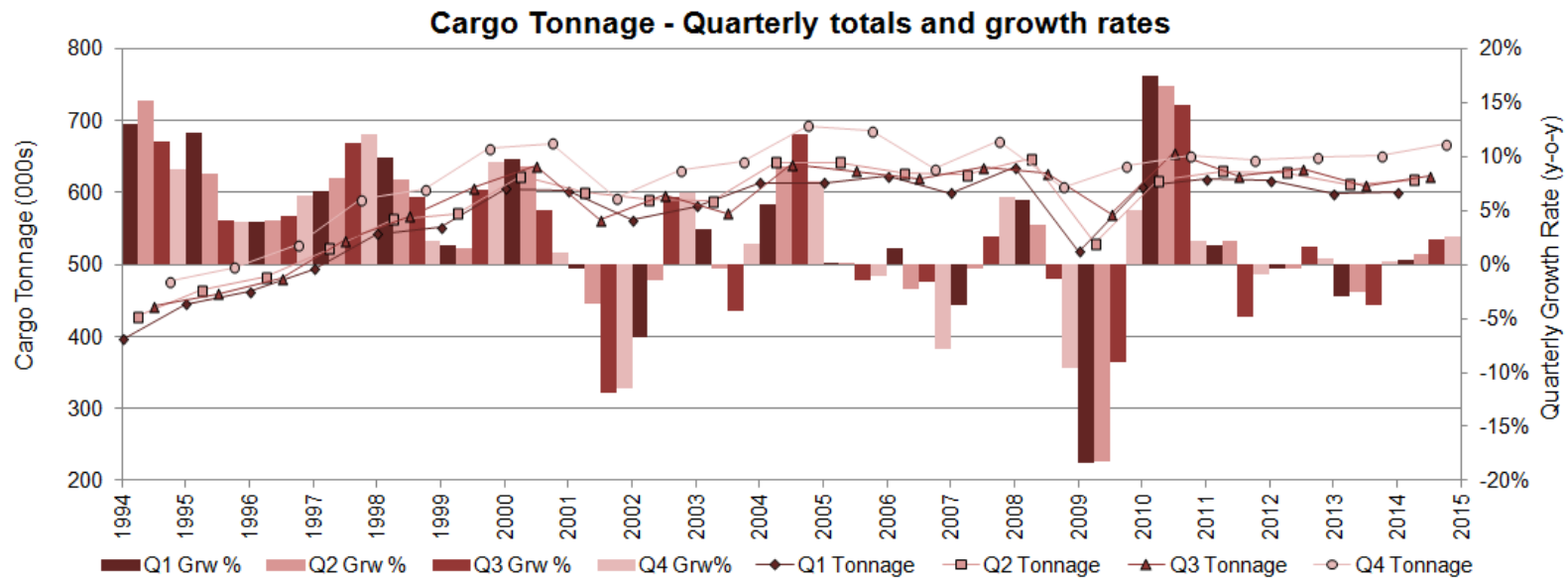
a. Terminal passengers



b. Commercial flights

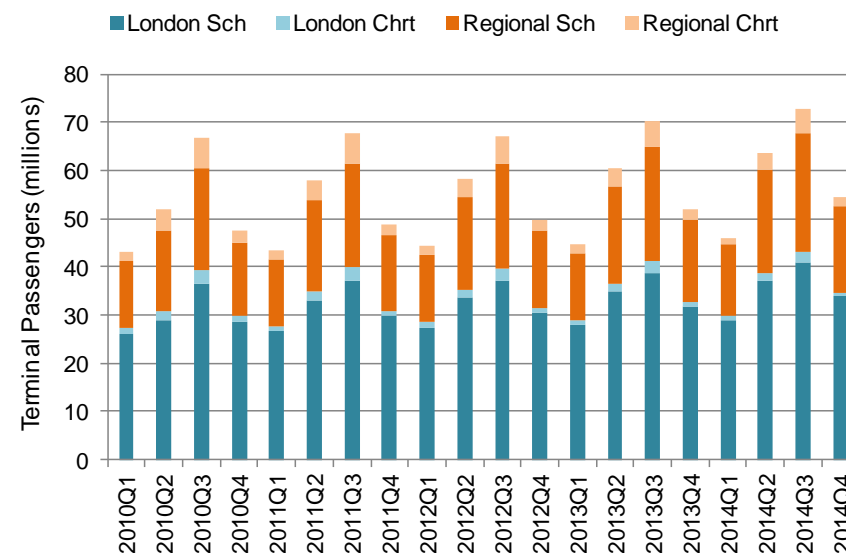


c. Cargo tonnage



2. Terminal passengers at UK airports see note 5 on p.15

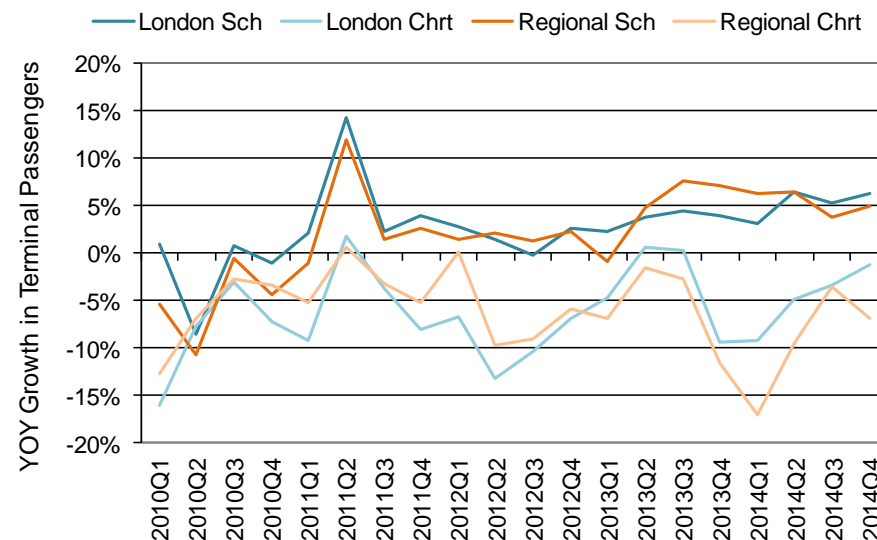
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2014		Q4 2013			Q1 14 – Q4 14		Q1 13 – Q4 13		
	Pax (mil)	% of total	Pax (mil)	% of total	% chg	Pax (mil)	% of total	Pax (mil)	% of total	% chg
London Airports	34.7	64%	32.7	63%	6.2%	146.6	62%	139.6	61%	5.0%
- Scheduled	33.8	62%	31.8	61%	6.4%	141.0	59%	133.8	59%	5.4%
- Charter	0.9	2%	0.9	2%	-1.1%	5.6	2%	5.9	3%	-4.3%
Regional Airports	19.9	36%	19.2	37%	3.8%	90.7	38%	87.8	39%	3.3%
- Scheduled	18.0	33%	17.1	33%	5.0%	78.7	33%	74.8	33%	5.3%
- Charter	1.9	3%	2.0	4%	-6.9%	12.0	5%	13.0	6%	-7.6%
All Airports	54.6	100%	51.9	100%	5.3%	237.3	100%	227.4	100%	4.4%
- Scheduled	51.8	95%	48.9	94%	5.9%	219.7	93%	208.5	92%	5.3%
- Charter	2.8	5%	2.9	6%	-5.2%	17.6	7%	18.8	8%	-6.6%



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 graphs 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 Q4 2014, London airports handled 6.2% more passengers, and regional airports 3.8% more than in the same quarter last year, on both counts driven by strong growth in scheduled traffic. On a rolling year basis covering all of 2014, total passenger numbers were 5.0% higher at London airports and 3.3% higher at regional airports than the year before.

Across all UK airports, the number of passengers on scheduled flights in Q4 2014 was up 5.9%, but down 5.2% on charter flights compared with the same quarter in 2013.



3. Passenger flights to and from UK airports see note 5 on p.15

No. of Flights (thousands)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2014		Q4 2013			Q1 14 – Q4 14		Q1 13 – Q4 13		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
London Airports	245.6	54%	235.5	53%	4.3%	1012.0	53%	980.3	52%	3.2%
- Scheduled	240.3	53%	230.2	52%	4.4%	981.1	51%	948.1	50%	3.5%
- Charter	5.3	1%	5.4	1%	-1.4%	30.9	2%	32.1	2%	-4.0%
Regional Airports	207.1	46%	206.1	47%	0.5%	898.5	47%	901.1	48%	-0.3%
- Scheduled	193.4	43%	191.8	43%	0.8%	821.9	43%	820.4	44%	0.2%
- Charter	13.6	3%	14.2	3%	-4.2%	76.6	4%	80.8	4%	-5.2%
All Airports	452.6	100%	441.6	100%	2.5%	1910.5	100%	1881.4	100%	1.5%
- Scheduled	433.7	96%	422.0	96%	2.8%	1803.0	94%	1768.5	94%	2.0%
- Charter	18.9	4%	19.6	4%	-3.4%	107.4	6%	112.9	6%	-4.9%

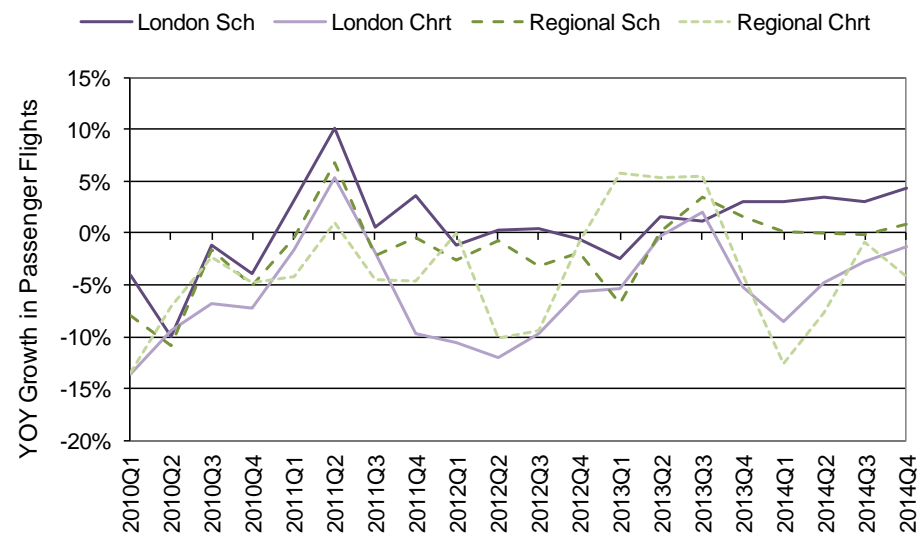


The figures in this table are for commercial passenger flights and thus exclude air freighter flights (those carrying cargo only).

Compared to Q4 2013, the number of total passenger flights at all UK airports increased by 2.5% in Q4 2014. There were 2.8% more scheduled flights, but 3.4% fewer charter flights, meaning that the charter traffic continued to decline.

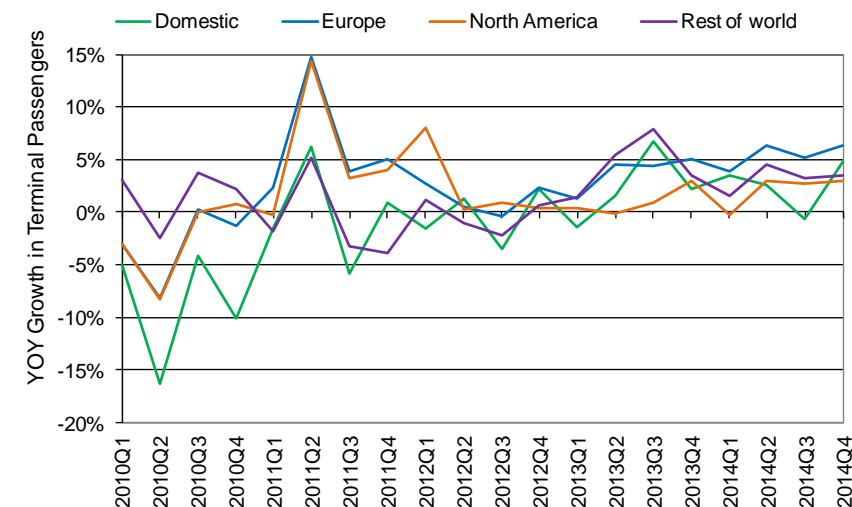
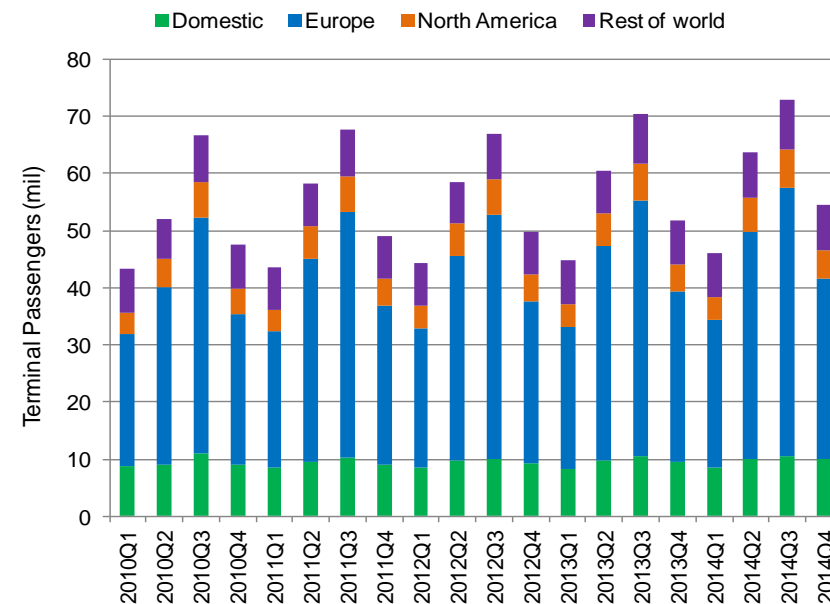
On a rolling year basis, the number of scheduled passenger flights was up by 2.0% and the number of charter passenger flights was down by 4.9%. For 2014 as a whole, total passenger flights grew by 1.5% compared with 2013.

There were 4.3% more passenger flights at the London airports and 0.5% more passenger flights at regional airports in Q4 2014 than in Q4 2013. On a rolling year basis, the number of flights was up by 3.2% at the London airports and down by 0.3% at the regional airports.



4. Terminal passengers at UK airports by origin/destination see note 5 on p.15

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2014		Q4 2013			Q1 14 – Q4 14		Q1 13 – Q4 13		
	Pax (mil)	% of total	Pax (mil)	% of total	% chg	Pax (mil)	% of total	Pax (mil)	% of total	% chg
Domestic	10.0	18.2%	9.5	18.3%	4.7%	39.2	16.5%	38.2	16.8%	2.4%
- Scheduled	9.8	18.0%	9.4	18.1%	4.8%	38.7	16.3%	37.8	16.6%	2.4%
- Charter	0.1	0.2%	0.1	0.2%	1.7%	0.5	0.2%	0.5	0.2%	2.0%
Europe	31.6	57.9%	29.7	57.3%	6.3%	144.2	60.8%	136.6	60.1%	5.5%
- Scheduled	29.7	54.4%	27.6	53.3%	7.6%	130.2	54.9%	121.7	53.5%	7.0%
- Charter	1.9	3.5%	2.1	4.1%	-10.0%	13.9	5.9%	14.9	6.6%	-6.8%
North America	5.0	9.2%	4.9	9.4%	2.9%	21.4	9.0%	20.9	9.2%	2.2%
- Scheduled	5.0	9.1%	4.8	9.3%	2.8%	21.2	8.9%	20.7	9.1%	2.3%
- Charter	0.0	0.1%	0.0	0.1%	23.1%	0.2	0.1%	0.2	0.1%	0.2%
Rest of World	8.0	14.7%	7.8	15.0%	3.4%	32.6	13.7%	31.6	13.9%	3.2%
- Scheduled	7.3	13.4%	7.1	13.7%	3.1%	29.6	12.5%	28.4	12.5%	4.4%
- Charter	0.7	1.3%	0.7	1.3%	7.4%	3.0	1.2%	3.2	1.4%	-7.5%
Total	54.6	100.0%	51.9	100.0%	5.3%	237.3	100.0%	227.4	100.0%	4.4%
- Scheduled	51.8	94.9%	48.9	94.3%	5.9%	219.7	92.6%	208.5	91.7%	5.3%
- Charter	2.8	5.1%	2.9	5.7%	-5.2%	17.6	7.4%	18.8	8.3%	-6.6%

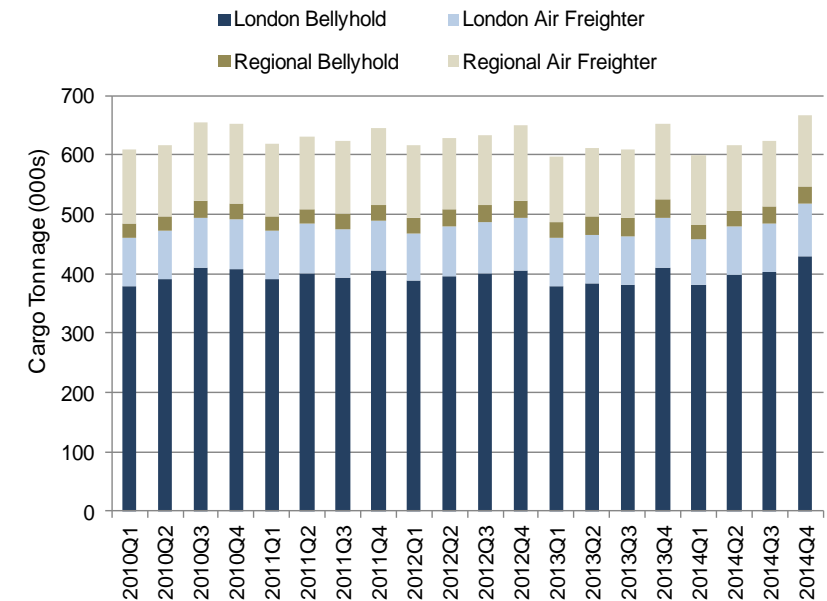


Compared to the same quarter last year, all regions have experienced an increase in passenger numbers. There were 4.7% more passengers travelling to domestic destinations, 6.3% more passengers travelling to Europe, 2.9% more passengers travelling to North America, and 3.4% more passengers travelling to the rest of the world. For all UK reporting airports, total passengers increased by 5.3% over the same period.

On a rolling year basis, the total number of passengers was up by 4.4%. This was made up of an increase of 5.5%, 2.2% and 3.2% of passengers travelling to and from Europe, North America and Rest of the World respectively, and a 2.4% increase in domestic traffic. Overall, passengers on charter flights have fallen by 5.2% in Q4 2014 (compared to Q4 2013) and by 6.6% on a rolling year basis.

5. Air cargo tonnes carried to and from UK airports see note 5 on p.15

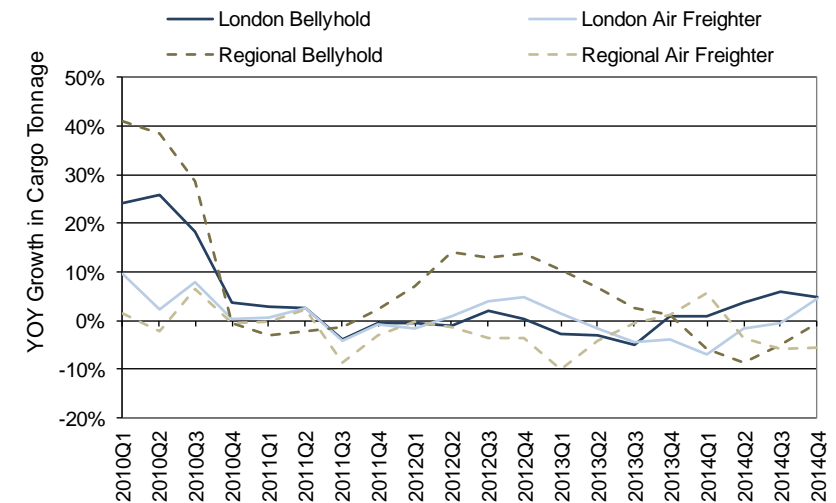
Tonnes (thousands)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2014		Q4 2013			Q1 14 – Q4 14		Q1 13 – Q4 13		
	Tonnes (000s)	% of total	Tonnes (000s)	% of total	% chg	Tonnes (000s)	% of total	Tonnes (000s)	% of total	% chg
Cargo on cargo only flights	204.0	31%	211.5	33%	-3.5%	772.5	31%	798.0	32%	-3.2%
- London	84.1	13%	84.6	13%	-0.6%	315.5	13%	329.7	13%	-4.3%
- Regional	119.9	18%	126.9	20%	-5.5%	457.0	18%	468.3	19%	-2.4%
Bellyhold cargo	458.8	69%	439.1	67%	4.5%	1722.9	69%	1669.9	68%	3.2%
- London	429.7	65%	409.7	63%	4.9%	1611.4	77%	1552.0	63%	3.8%
- Regional	29.2	4%	29.4	5%	-0.8%	111.5	23%	118.0	5%	-5.5%
Total cargo	662.9	100%	650.7	100%	1.9%	2495.4	100%	2467.9	100%	1.1%
- London	513.8	78%	494.3	76%	3.9%	1926.9	77%	1881.7	76%	2.4%
- Regional	149.1	22%	156.3	24%	-4.6%	568.5	23%	586.2	24%	-3.0%



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 Q4 2013, total cargo tonnage at all UK airports was up 1.9% in Q4 2014. This consisted of an increase of 3.9% at London airports and a decrease of 4.6% at Regional airports. Whilst air freighter tonnage decreased by 3.5%, bellyhold cargo tonnage increased by 4.5% compared with the same quarter last year.

On a rolling year basis, total cargo tonnage handled at UK airports was up by 1.1% compared with the year before, driven by 3.2% increase in bellyhold cargo tonnage as well as 3.2% reduction in air freighter cargo tonnage.



6. All commercial flights to and from UK airports see note 5 on p.15

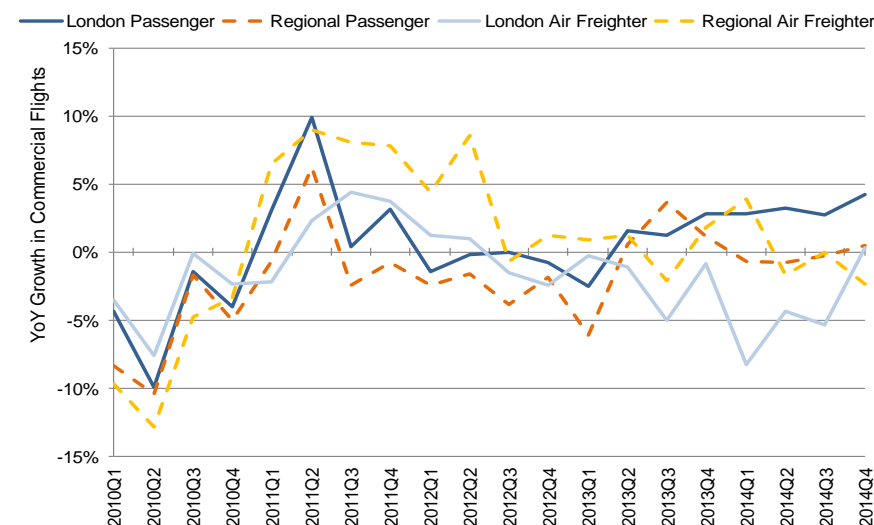
Flights (thousands)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2014		Q4 2013			Q1 14 – Q4 14		Q1 13 – Q4 13		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
Air freighter	13.5	3%	13.8	3%	-1.7%	53.1	3%	53.7	3%	-1.2%
- London	3.5	1%	3.4	1%	0.3%	13.2	1%	13.9	1%	-4.4%
- Regional	10.1	2%	10.3	2%	-2.4%	39.8	2%	39.8	2%	-0.1%
Passenger flights	452.6	97%	441.6	97%	2.5%	1,910.4	97%	1,881.4	97%	1.5%
- London	245.6	53%	235.5	52%	4.3%	1,012.0	52%	980.3	51%	3.2%
- Regional	207.1	44%	206.1	45%	0.5%	898.5	46%	901.1	47%	-0.3%
Total flights	466.2	100%	455.3	100%	2.4%	1,963.5	100%	1,935.1	100%	1.5%
- London	249.0	53%	239.0	52%	4.2%	1,025.2	52%	994.1	51%	3.1%
- Regional	217.1	47%	216.4	48%	0.4%	938.3	48%	941.0	49%	-0.3%



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 Q4 2014, the total number of commercial flights in the UK was up 2.4% compared to Q4 2013 – the combined effect of 2.5% increase in the number of passenger flights and 1.7% reduction in the number of freighter flights. The London airports saw an overall increase of 4.2% in the total number of flights and the regional airports experienced an increase of 0.4%.

On a rolling year basis, the total number of commercial flights was up 1.5% compared with the year before, driven by 3.1% growth at London airports. Commercial flights at Regional airports declined by 0.3% over the same period.



7. Punctuality of scheduled passenger flights to and from UK airports see note 6 on p.15

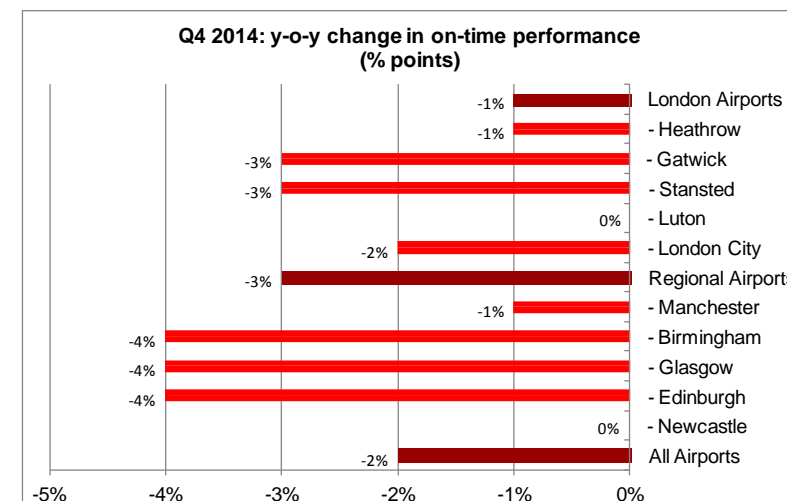
a. On-time performance

Matched scheduled passenger flights (000s), % of flights on-time	CURRENT QUARTER				ROLLING YEAR					
	Q4 2014		Q4 2013		Change (% points)	Q1 13 – Q4 14		Q1 13 – Q4 14		Change (% points)
	Flights (000s)	% on-time	Flights (000s)	% on-time		Flights (000s)	% on-time	Flights (000s)	% on-time	
London Airports	237	77%	228	78%	-1%	968	77%	938	78%	-1%
- Heathrow	115	74%	115	75%	-1%	467	77%	466	76%	+1%
- Gatwick	54	76%	52	79%	-3%	232	74%	221	77%	-3%
- Stansted	33	79%	29	82%	-3%	130	79%	118	84%	-5%
- Luton	16	81%	15	81%	0%	69	77%	65	82%	-5%
- London City	19	85%	17	87%	-2%	70	88%	68	89%	-1%
Regional Airports	101	81%	98	84%	-3%	421	81%	412	83%	-2%
- Manchester	34	80%	33	81%	-1%	143	80%	139	79%	+1%
- Birmingham	20	82%	18	86%	-4%	79	82%	75	86%	-4%
- Glasgow	17	80%	16	84%	-4%	68	82%	66	84%	-2%
- Edinburgh	23	81%	23	85%	-4%	95	82%	97	85%	-3%
- Newcastle	8	84%	8	84%	0%	36	85%	36	84%	+1%
All Airports	338	78%	325	80%	-2%	1389	79%	1350	80%	-1%

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 and including 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 Q4 2014, 78% of flights were on time, which was down by 2 percentage points compared to the same quarter last year. The erosion in percentage of on-time performance compared with the same quarter in 2013 affected all the monitored airports, with the exception of Newcastle and Luton, whose punctuality was unchanged. On a rolling year basis, the percentage of on-time flights fell by 1 percentage point across the ten London and Regional airports.

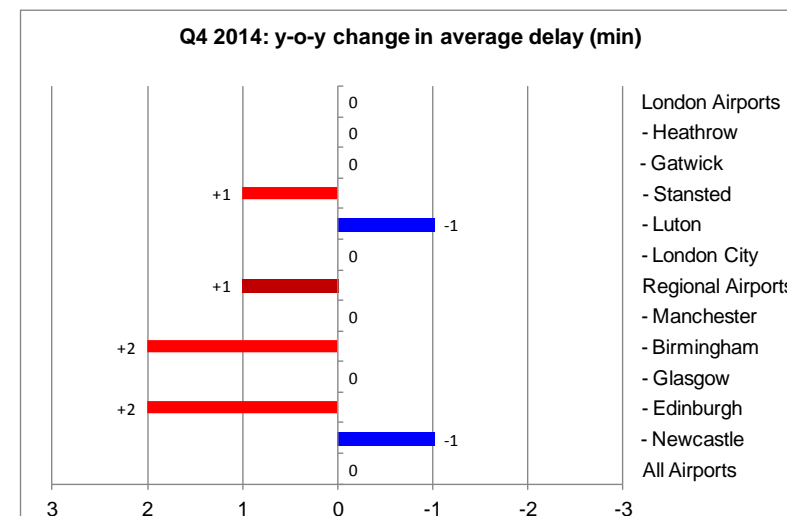


b. Average Delay

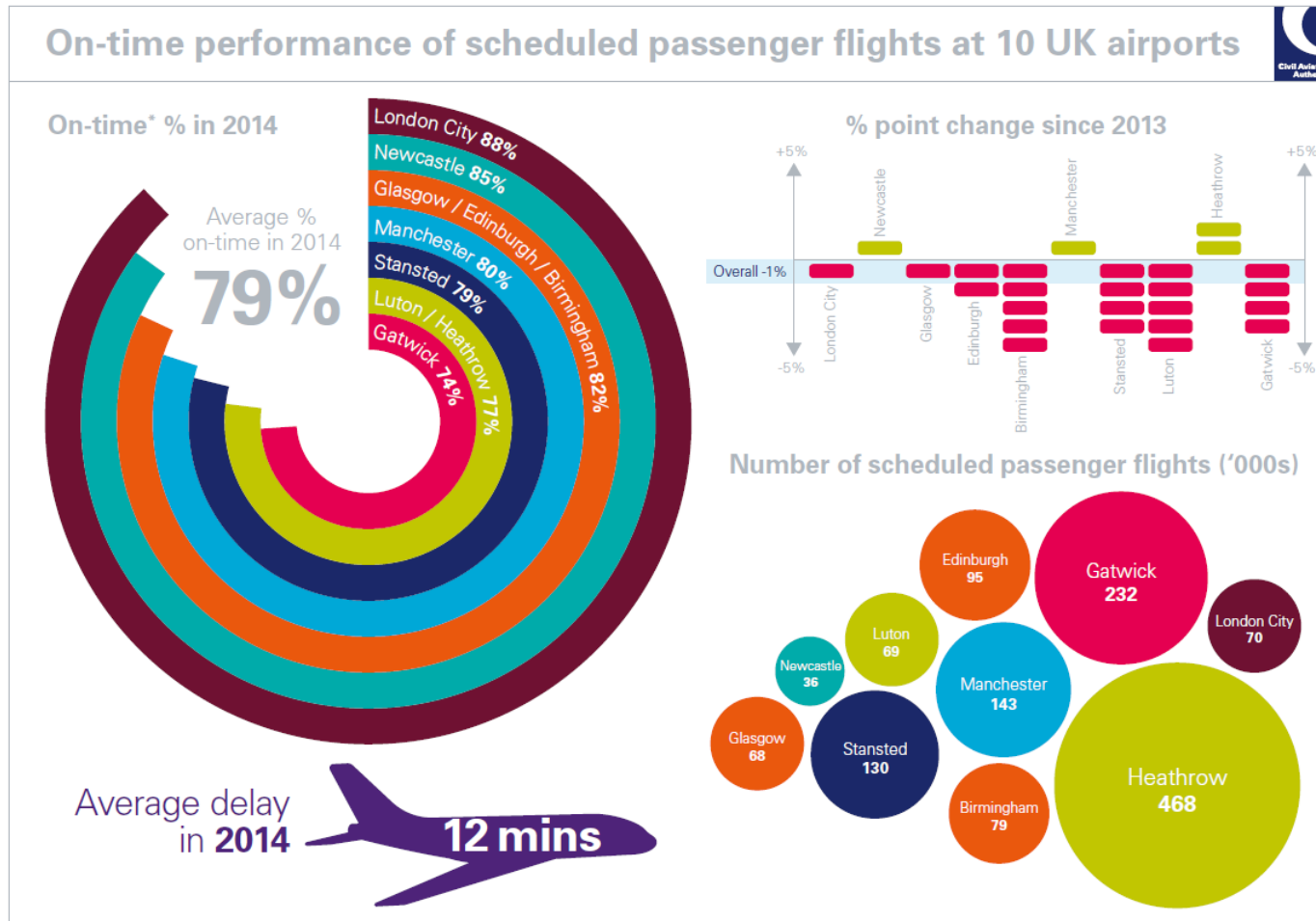
Matched scheduled passenger flights (000s), % of flights on-time	CURRENT QUARTER					ROLLING YEAR				
	Q4 2014		Q4 2013		Change in Avg. delay (min)	Q1 13 – Q4 14		Q1 13 – Q4 14		Change in Avg. delay (min)
	Flights (000s)	Avg. Delay (min)	Flights (000s)	Avg. Delay (min)		Flights (000s)	Avg. Delay (min)	Flights (000s)	Avg. Delay (min)	
London Airports	237	13	228	13	0	968	13	938	12	+1
- Heathrow	115	14	115	14	0	467	13	466	14	-1
- Gatwick	54	13	52	13	0	232	15	221	13	+2
- Stansted	33	12	29	11	+1	130	11	118	9	+2
- Luton	16	11	15	12	-1	69	13	65	11	+2
- London City	19	8	17	8	0	70	7	68	7	0
Regional Airports	101	11	98	10	+1	421	11	412	10	+1
- Manchester	34	11	33	11	0	143	12	139	12	0
- Birmingham	20	10	18	8	+2	79	11	75	9	+2
- Glasgow	17	11	16	11	0	68	10	66	10	0
- Edinburgh	23	11	23	9	+2	95	10	97	9	+1
- Newcastle	8	9	8	10	-1	36	9	36	10	-1
All Airports	338	12	325	12	0	1389	12	1350	12	0

Average delay per flight across the ten airports monitored was 12 minutes for Q4 2014. This represented no change against the same quarter last year. Luton, Glasgow and Newcastle airports registered an improvement in average delay compared with the same quarter in 2013.

On a rolling year basis, the overall average delay per flight was 12 minutes, unchanged against the year before, with London registering an increase in average delay of 1 minute to 13 minutes, whilst the average delay at Regional airports also rose by 1 minute to 11 minutes.



Did you know?



CAA 2014 Punctuality Statistics:

The CAA collects punctuality statistics for a number of the UK's largest airports and has recently published the punctuality statistics for the 10 airports covered in 2014. London is represented by Heathrow, Gatwick, Stansted, Luton and London City. Regional airports covered include Manchester, Birmingham, Newcastle, Edinburgh and Glasgow.

As of the last quarter of 2014, the number of airports monitored rose to 24 (an additional 14 airports).

During 2015, the coverage will extend further to 25 airports and there are also plans to publish cancellation statistics.

The infographic, shown here for 2014, summarises the on time performance and average delay figures for the airports monitored in 2014, as well as the size of the airports in terms of scheduled passenger flights for context.

Of all the airports monitored in 2014, London City had the best on time performance, with 88% of

flights early or up to and including 15 minutes of their scheduled time. The majority of the airports saw on time performance decline against 2013, though Newcastle, Manchester and Heathrow saw better punctuality of flights than last year. Overall, the average delay was 12 minutes, unchanged from a year earlier.

Punctuality statistics are published both monthly and annually – more information can be found under the **Flight Punctuality** statistics subpage (www.caa.co.uk/punctuality), within the Data, Analysis & Statistics section of the CAA website (www.caa.co.uk/statistics). Press notices can also be found with our news archive on the CAA website (www.caa.co.uk/news).

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 oil rigs.		✓	✓	✓	✓	✓
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.
- An 'on-time' flight is defined as departing or arriving at a UK airport either early or up to and including 15 minutes late.
- 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.