Aviation Trends

Quarter 3 2015

Civil Aviation Authority

Contents

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.

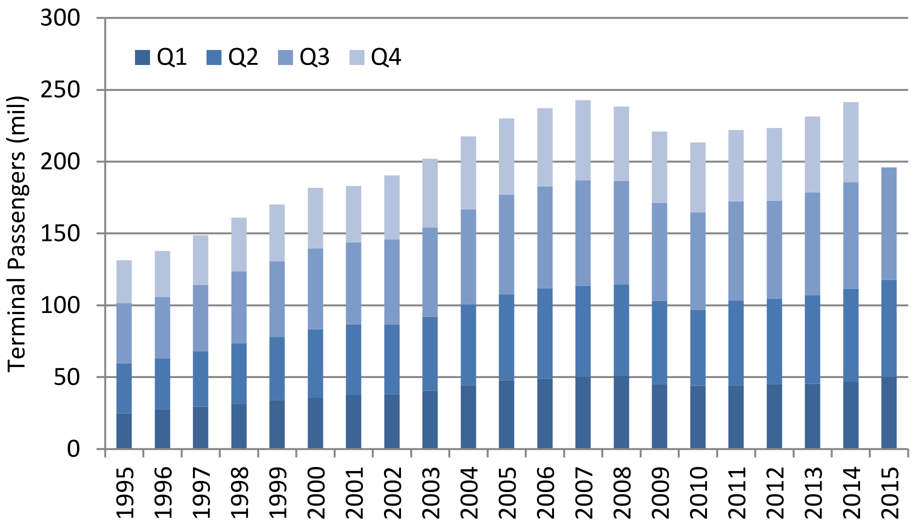
The Aviation Trends series is available at www.caa.co.uk/aviationtrends, part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications. Please note that historic numbers may be subject to minor change as the result of prior period adjustments.[1] Due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

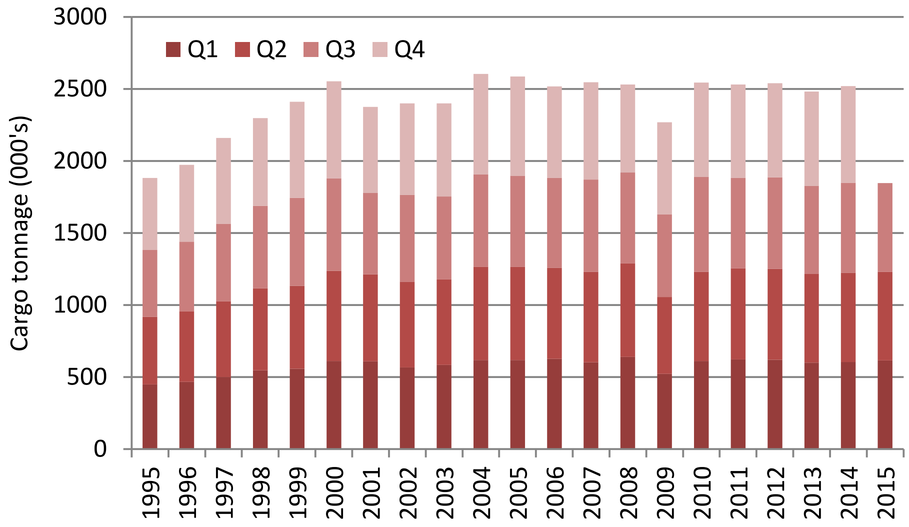
[1] Also, in editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. These islands are not formally part of the UK, and as we wish to present only the trends at UK airports, their figures are now excluded from the UK reporting airports, although travel between the UK and these airports is treated as domestic.

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

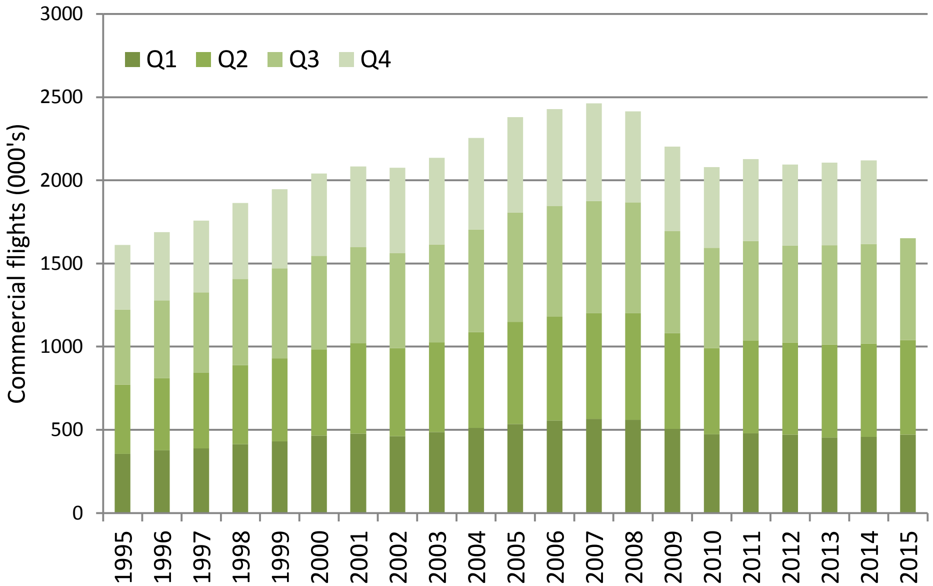
a. Terminal passengers



b. Cargo tonnage



c. Commercial flights



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

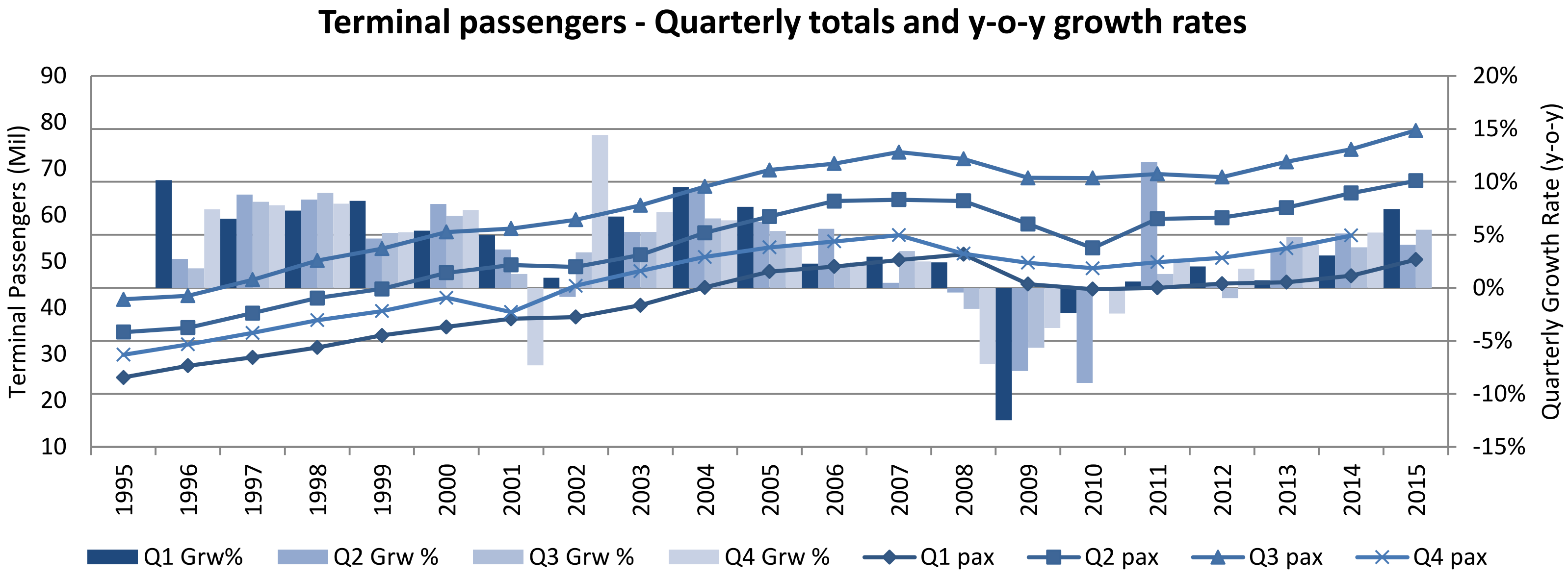
On pages 4 to 6, the top charts show traffic volume in each quarter (left axis), and the corresponding year-on-year quarterly growth rates (right axis). The bottom charts show the rolling annual total traffic in each quarter (left axis), and the year-on-year percentage growth of the rolling annual total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

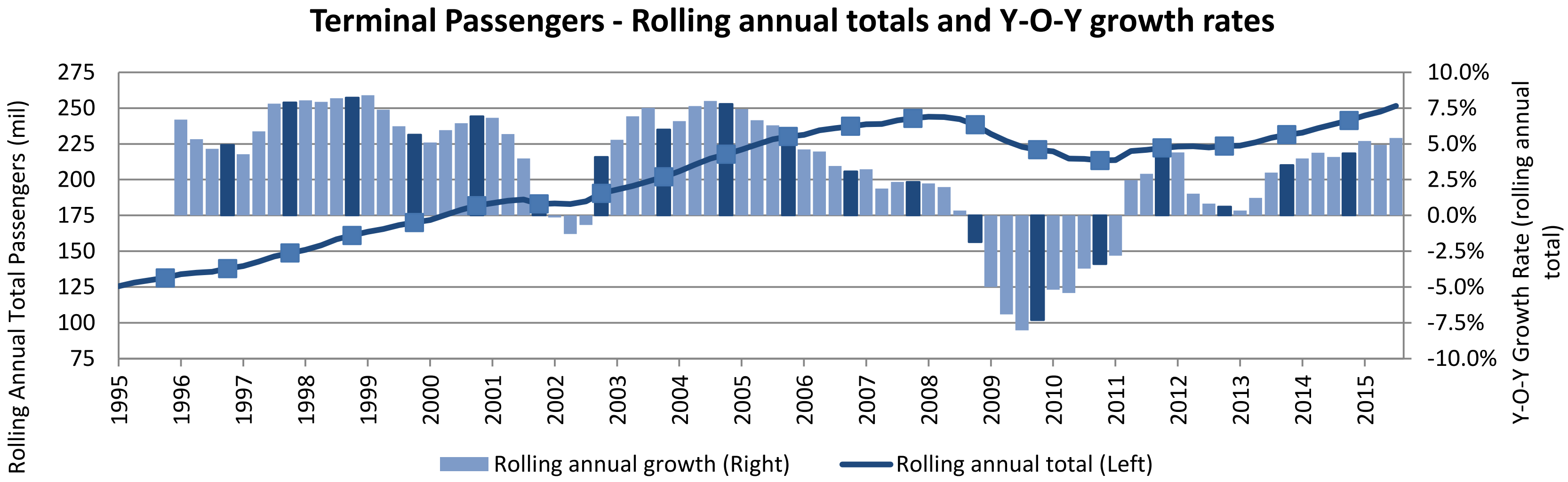
In Q3 2015, UK airports handled 78 million terminal passengers, representing a new high in terms of the number of passengers flown. On a rolling year basis, terminal passengers also hit a new record (252m pax), surpassing the previous high (247m pax) set in the previous quarter (Q2 2015). The new level is 3.1% above the pre-recession rolling year peak (Q2 2007 to Q1 2008).

Q3 2015 saw 611 thousand commercial flights, representing 2.0% growth against the same quarter in the last year. Despite record terminal passenger numbers, commercial flights remain some 12.6% below the pre-recession peak on a rolling 12-month basis. The general trend over recent years has been for more passengers to be accommodated on a per flight basis due to higher load factors and larger aircraft utilised.

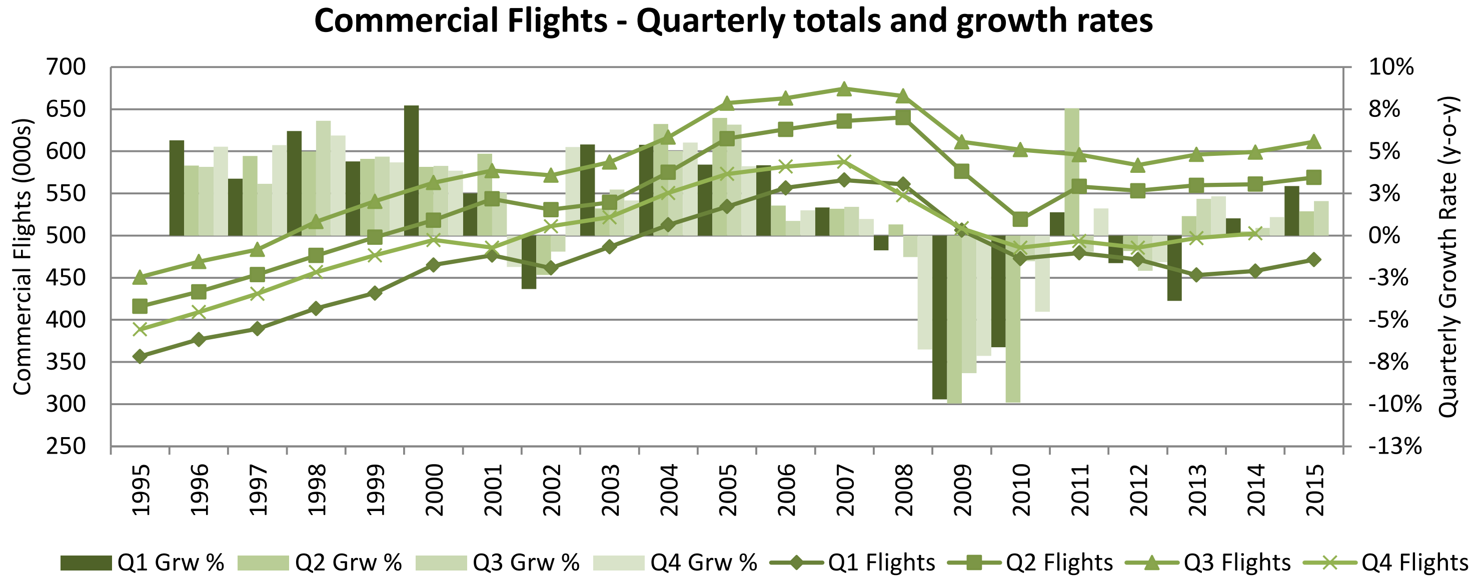
Q3 2015 also saw 616 thousand tonnes of cargo pass through UK airports, representing a decline of 1.6% against Q3 2014. With the exception of 2009, which was impacted by the global financial crisis, cargo tonnage has been reasonably constant over the last ten years.

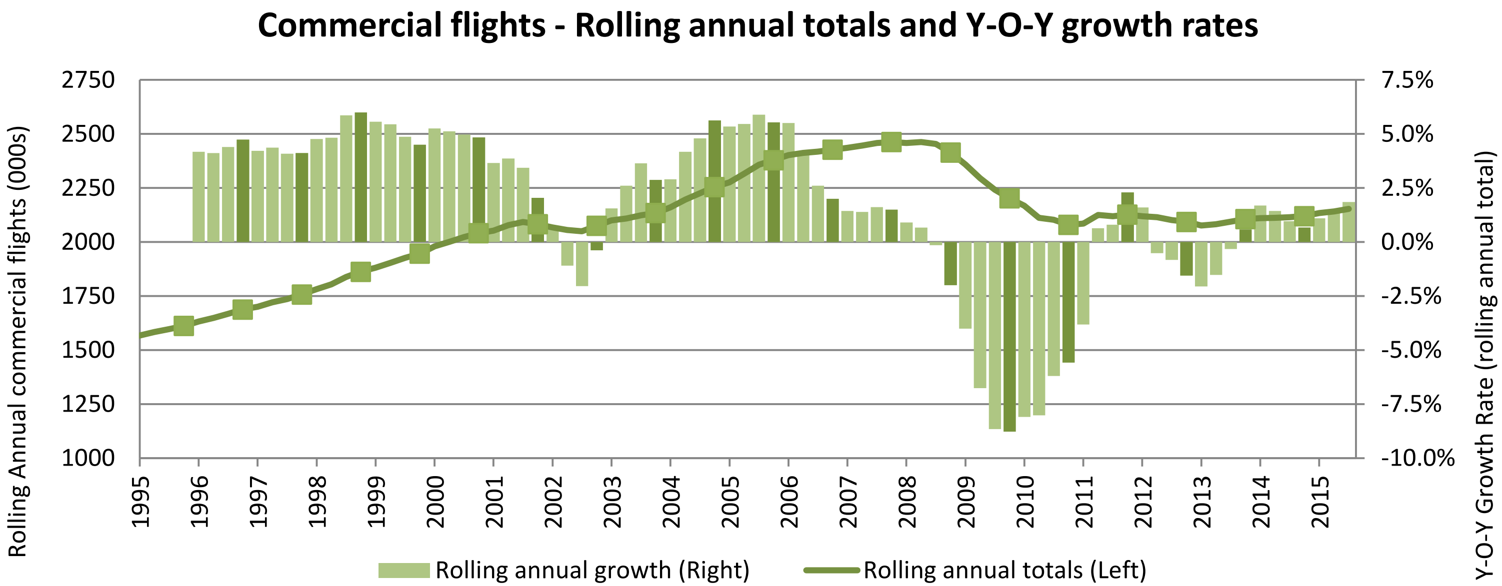
a. Terminal passengers



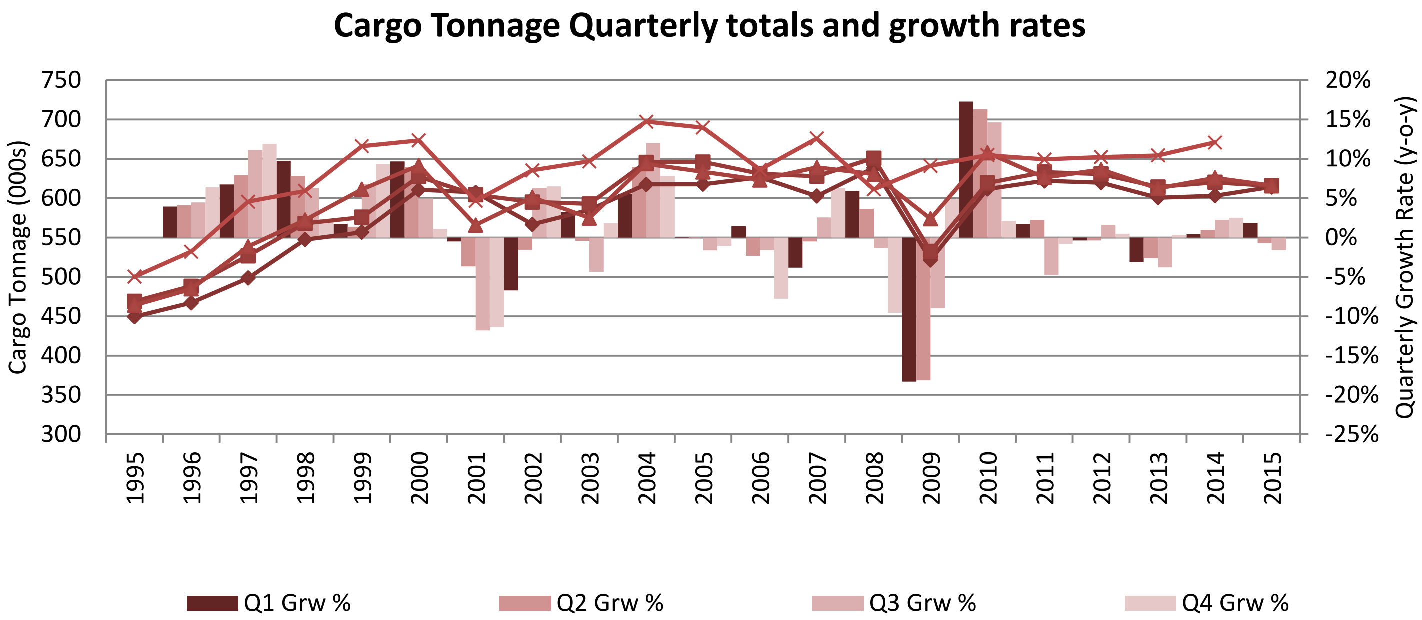


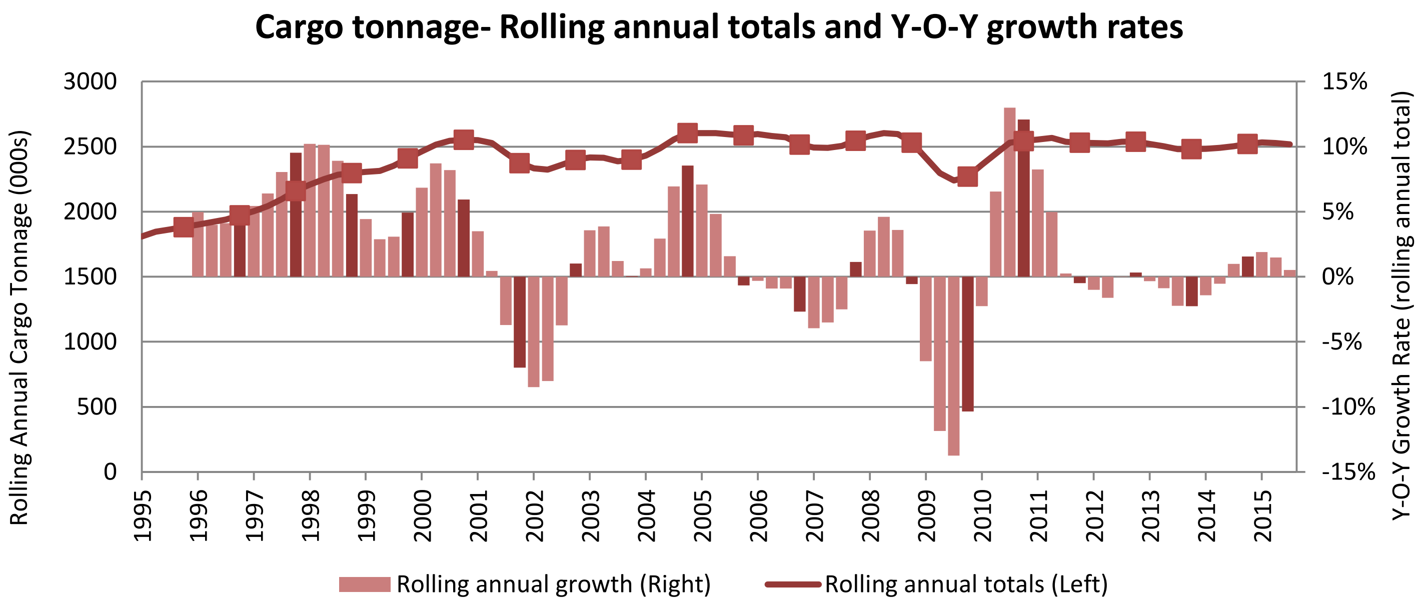
b. Commercial flights





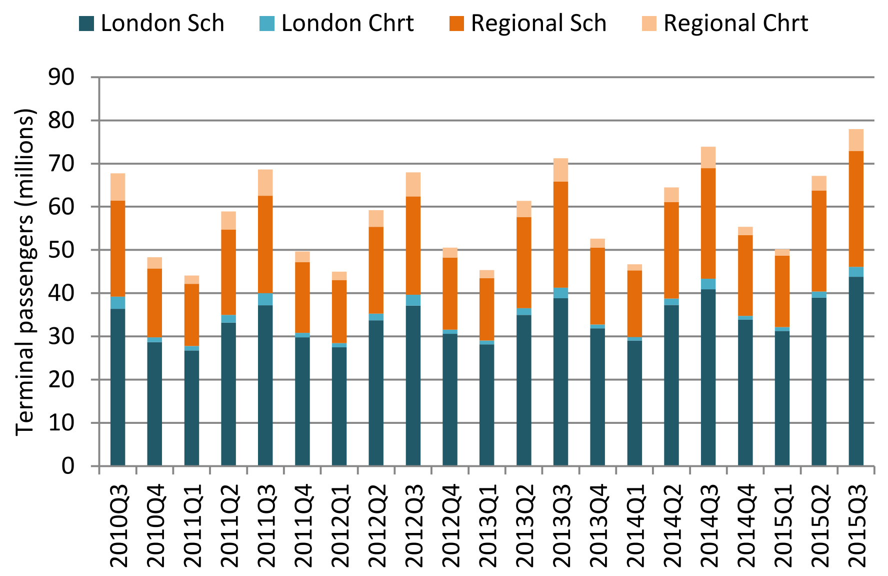
c. Cargo tonnage

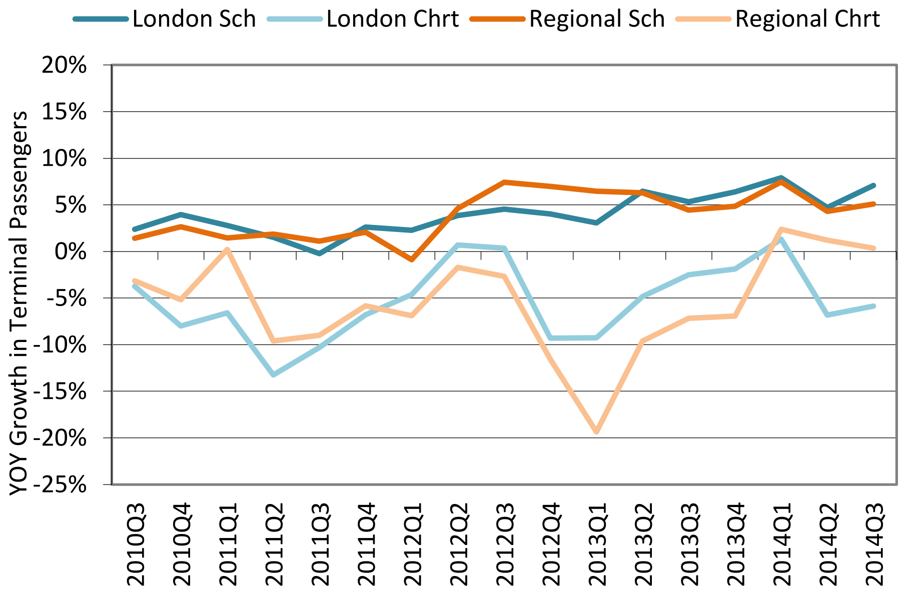




2. Terminal passengers at UK airports see note 5 on p.14

Pax (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2015		Q3 2014			Q4 14 – Q3 15		Q4 13 – Q3 14		
	Pax (Mil)	% of total	Pax (Mil)	% of total	% chg	Pax (Mill)	% of total	Pax (Mil)	% of total	% chg
London Airports	**46.1**	**59%**	**43.3**	**59%**	**6.4%**	**153.3**	**61%**	**144.6**	**61%**	**6.0%**
- Scheduled	43.8	56%	40.9	55%	**7.1%**	147.9	**59%**	139.0	**58%**	**6.5%**
- Charter	2.3	3%	2.4	3%	**-5.9%**	5.4	**2%**	5.6	**2%**	**-4.4%**
Regional Airports	**31.9**	**41%**	**30.6**	**41%**	**4.3%**	**97.3**	**39%**	**93.1**	**39%**	**4.5%**
- Scheduled	26.9	**34%**	25.6	**35%**	**5.1%**	85.5	**34%**	81.2	**34%**	**5.3%**
- Charter	5.0	**6%**	5.0	**7%**	**0.4%**	11.9	**5%**	11.9	**5%**	**-0.4%**
All Airports	**78.0**	**100%**	**73.9**	**100%**	**5.5%**	**250.6**	**100%**	**237.7**	**100%**	**5.4%**
- Scheduled	70.7	**91%**	66.5	90%	**6.3%**	233.4	93%	220.1	**93%**	**6.0%**
- Charter	7.3	**9%**	7.4	10%	**-1.7%**	17.3	7%	17.6	**7%**	**-1.7%**





UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in this section therefore exclude transit passengers – those who remain on-board aircraft which land at a UK airport and then continue on to another destination.

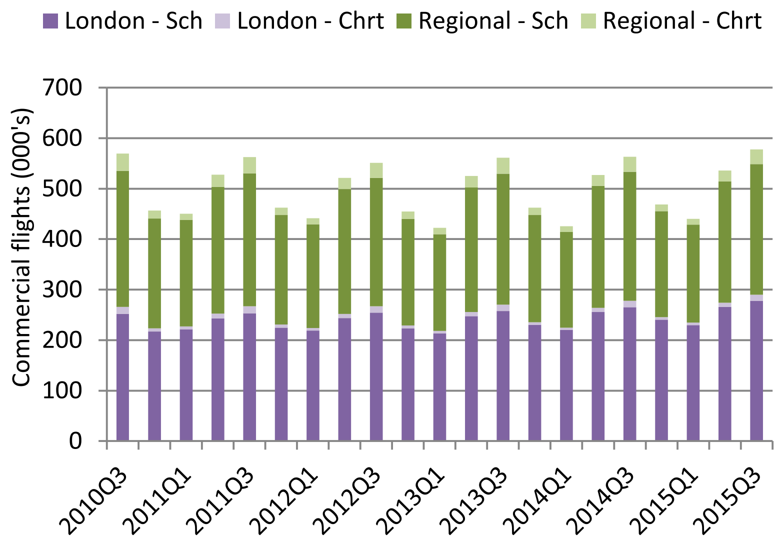
In Q3 2015, London airports handled 6.4% more passengers, and regional airports 4.3% more than in the same quarter last year. Scheduled passengers, which form the majority of total terminal passengers (91% market share), grew by 6.3% overall. Charter traffic on the other hand saw a decline of -1.7% overall, principally in the London region.

On a rolling year basis covering Q4 2014 to Q3 2015, terminal passengers were 6.0% higher at London airports and 4.5% higher at regional airports than the year before. This represents 5.4% growth in UK terminal passengers overall for the same period.

The number of terminal passengers at London airports hit a new high in the rolling year to Q3 2015, with nearly 10% more passengers flying than in the pre-recession peak of 140m passengers (rolling year to Q1 2008). The number of terminal passengers using regional airports however have not recovered to their pre-recession levels and remains approximately 6% below the pre-recession peak of 103m passengers (rolling year to Q2 2008).

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

Flights (000's)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2015		Q3 2014			Q4 15 – Q3 14		Q4 14 – Q3 13		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
London Airports	**289.9**	**50%**	**277.6**	**49%**	**4.4%**	**1,044.2**	**52%**	**1,002.0**	**51%**	**4.2%**
- Scheduled	277.7	48%	265.0	47%	**4.8%**	1,014.0	**50%**	971.0	**49%**	**4.4%**
- Charter	12.2	2%	12.6	2%	**-3.6%**	30.2	**1%**	31.0	**2%**	**-2.8%**
Regional Airports	288.0	**50%**	285.6	**51%**	**0.9%**	**979.1**	**48%**	**975.7**	**49%**	**0.3%**
- Scheduled	258.6	**45%**	256.0	**45%**	**1.0%**	903.1	**45%**	899.6	**45%**	**0.4%**
- Charter	29.5	**5%**	29.5	**5%**	**-0.2%**	76.0	**4%**	76.1	**4%**	**-0.1%**
All Airports	**577.9**	**100%**	**563.2**	**100%**	**2.6%**	**2,023.2**	**100%**	**1,977.7**	**100%**	**2.3%**
- Scheduled	536.3	**93%**	521.0	**93%**	**2.9%**	1,917.1	**95%**	1,870.6	**95%**	**2.5%**
- Charter	41.6	**7%**	42.2	**7%**	**-1.2%**	106.1	**5%**	107.1	**5%**	**-0.9%**



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

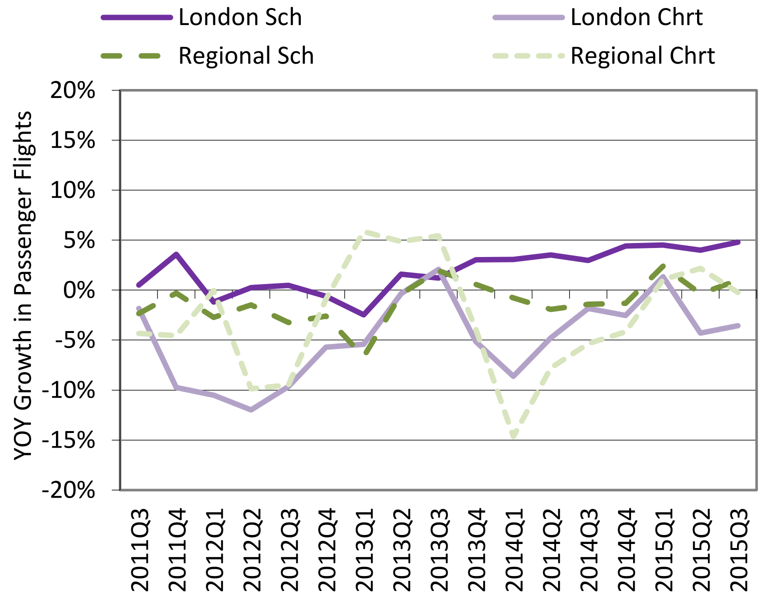
The number of total passenger flights at all UK airports increased by 2.6% when compared to the same quarter last year, lower than the 5.5% achieved for terminal passengers over the same period.

There were 2.9% more scheduled flights and 1.2% fewer charter flights compared to the same quarter last year. For the scheduled segment, this growth in passenger flights trails the equivalent growth rate for scheduled terminal passengers (6.3%), suggesting more passengers being accommodated on a per flight basis for this segment, either through higher load factors and/or larger aircraft utilised.

On a rolling year basis, the number of scheduled passenger flights was up by 2.5% and the number of charter passenger flights was down by 0.9%, the latter driven mainly by the decline in charter trafficfrom London airports (-2.8%).

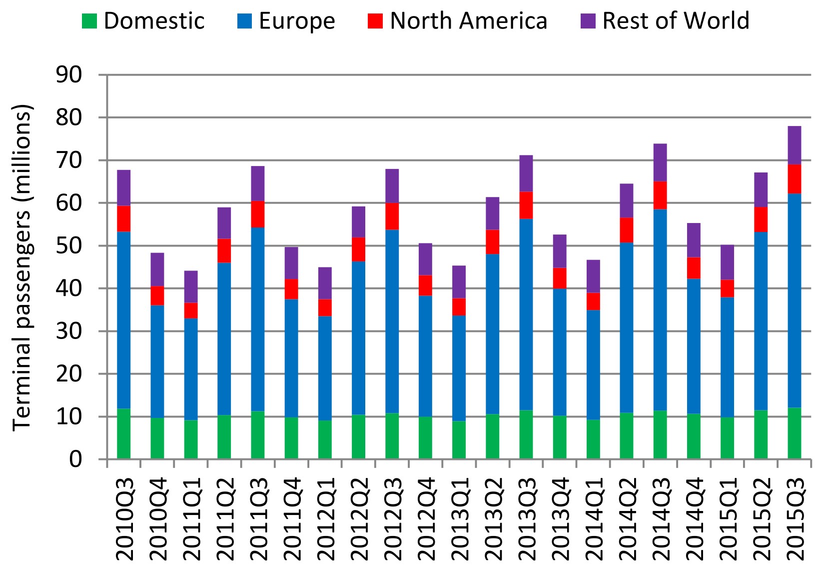
Looking at the regional split, there were 4.4% more passenger flights at the London airports and 0.9% more passenger flights at regional airports when compared to the same quarter last year. On a rolling year basis, the number of flights was up by 4.2% at the London airports and up by 0.3% at the regional airports.

Not only is the scheduled segment the largest in terms of market share, it has also proved to be the most resilient over the course of the last few years, with the London airports contributing most to UK passenger flights growth in this time.



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

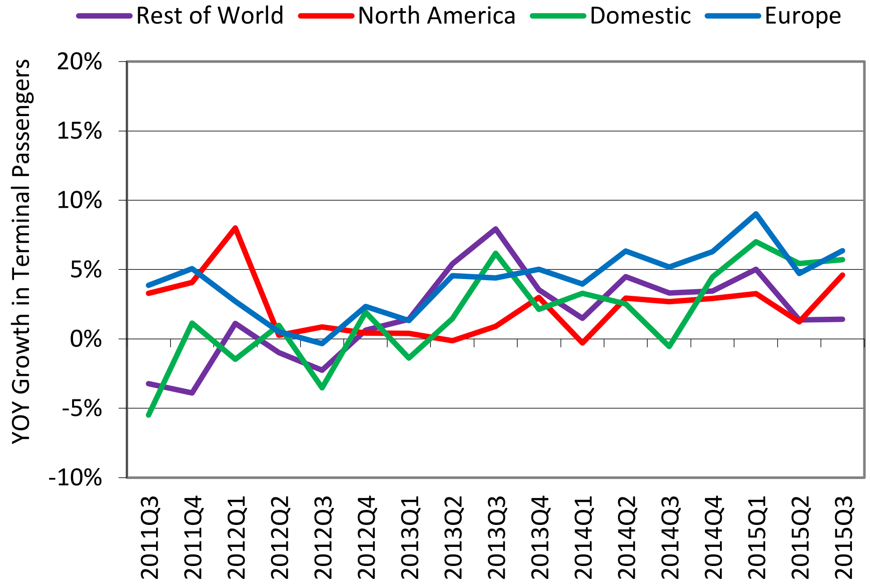
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2015		Q3 2014			Q3 15 – Q4 14		Q3 15 – Q4 13		
	Pax (Mill)	% of total	Pax (Mill)	% of total	% chg	Pax (Mill)	% of total	Pax (Mill)	% of total	% chg
Domestic	**12.1**	**15%**	**11.4**	**15%**	**5.7%**	**44.0**	**18%**	**41.7**	**18%**	**5.6%**
- Scheduled	11.9	15%	11.3	15%	5.8%	43.5	17%	41.2	17%	5.7%
- Charter	0.1	0.2%	0.1	0.2%	-3.3%	0.5	0.2%	0.5	0.2%	1.0%
Europe	**50.1**	**64%**	**47.1**	**64%**	**6.4%**	**151.5**	**60%**	**142.4**	**60%**	**6.4%**
- Scheduled	43.6	56%	40.7	55%	7.0%	137.8	55%	128.5	54%	7.2%
- Charter	6.5	8%	6.4	9%	2.4%	13.7	5%	13.9	6%	-1.6%
North America	**6.8**	**9%**	**6.5**	**9%**	**4.6%**	**21.9**	**9%**	**21.2**	**9%**	**3.0%**
- Scheduled	6.7	9%	6.4	9%	5.0%	21.7	9%	21.0	9%	3.2%
- Charter	0.1	0.1%	0.1	0.1%	-21.6%	0.2	0.1%	0.2	0.1%	-8.5%
Rest of World	**9.0**	**12%**	**8.9**	**12%**	**1.4%**	**33.2**	**13%**	**32.3**	**14%**	**2.8%**
- Scheduled	8.4	11%	8.0	11%	4.7%	30.4	12%	29.4	12%	3.2%
- Charter	0.6	1%	0.8	1%	-29.9%	2.8	1%	2.9	1%	-2.0%
All Airports	**78.0**	**100%**	**73.9**	**100%**	**5.5%**	**250.6**	**100%**	**237.7**	**100%**	**5.4%**
- Scheduled	70.7	91%	66.5	90%	6.3%	233.4	93%	220.1	93%	6.0%
- Charter	7.3	9%	7.4	10%	-1.7%	17.3	7%	17.6	7%	-1.7%



Compared to the same quarter last year, total passengers increased by 5.5% across all UK reporting airports. All regions experienced an increase in passenger numbers over the same period, with Europe being the best performing (+6.4%), but with Rest of the World representing the market with the weakest growth (+1.4%). There were 5.7% more passengers travelling to domestic destinations, and 4.6% more passengers travelling to North America.

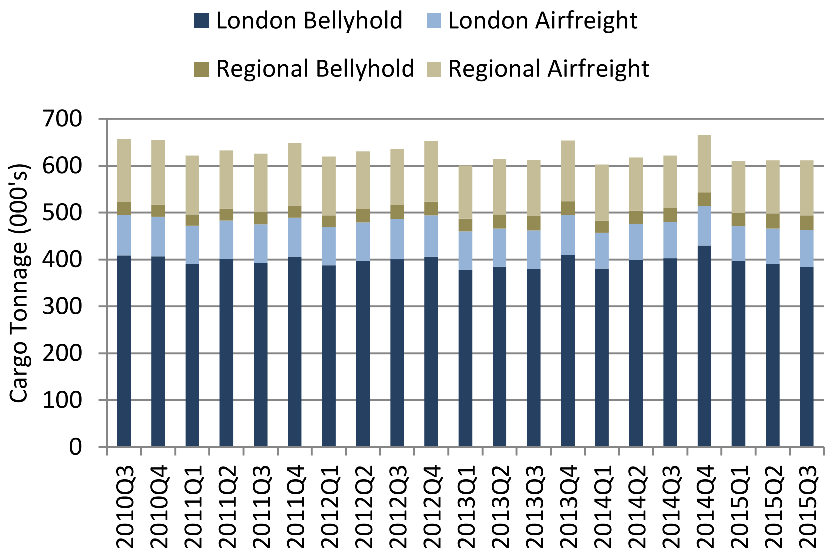
On a rolling year basis, the total number of passengers was up by 5.4%, very similar to the growth for Q3 2015. This was made up of an increase of 6.4%, 3.0% and 2.8% of passengers travelling to and from Europe, North America and Rest of the World respectively, and a 5.6% increase in domestic traffic.

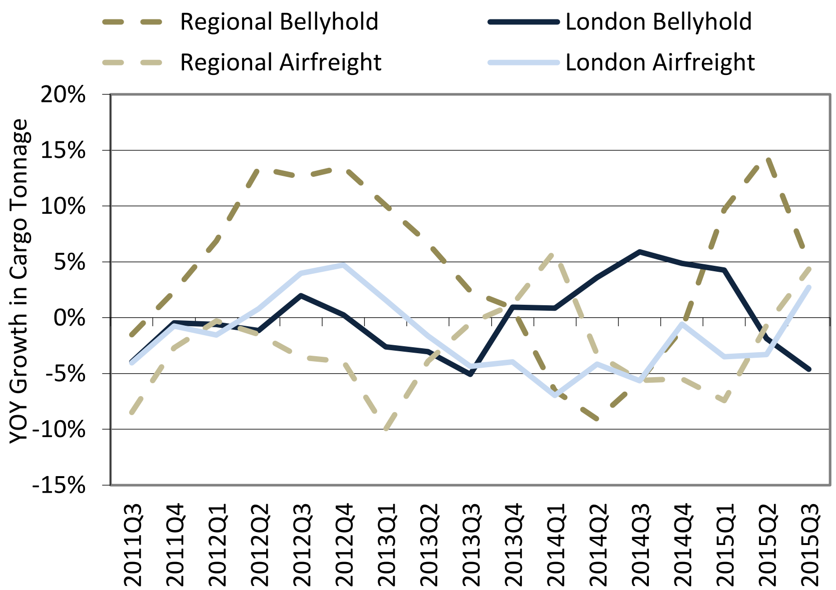
The European market has proved to be the strongest in terms of terminal passenger growth over the last few years, and has seen a gradual increase in market share, at the expense of all other markets which have all seen a decline in their respective market shares.



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

Tonnes (000's)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2015		Q3 2014			Q3 15 – Q4 14		Q3 14 – Q4 13		
	Tonnes (000's)	% of total	Tonnes (000's)	% of total	% chg	Tonnes (000's)	% of total	Tonnes (000's)	% of total	% chg
Cargo only flights	**196.3**	**32%**	**189.3**	**30%**	**3.7%**	**775.9**	**31%**	**791.5**	**32%**	**-2.0%**
- London	79.4	**13%**	77.3	**12%**	**2.7%**	312.4	**13%**	316.0	**13%**	**-1.1%**
- Regional	116.9	**19%**	112.0	**18%**	**4.4%**	463.6	**19%**	475.5	**19%**	**-2.5%**
Bellyhold cargo	414.8	**68%**	**432.0**	**70%**	**-4.0%**	**1,722.1**	**69%**	**1,704.3**	**68%**	**1.0%**
- London	383.9	**63%**	402.5	**65%**	**-4.6%**	1,601.6	**64%**	1,591.5	**64%**	**0.6%**
- Regional	30.9	**5%**	29.5	**5%**	**4.9%**	120.5	**5%**	112.9	**5%**	**6.8%**
Total cargo	**611.1**	**100%**	**621.3**	**100%**	**-1.6%**	**2,498.0**	**100%**	**2,495.8**	**100%**	**0.1%**
- London	463.3	**76%**	479.8	**77%**	**-3.4%**	1,913.9	**77%**	1,907.5	**76%**	**0.3%**
- Regional	147.8	**24%**	141.5	**23%**	**4.5%**	584.1	**23%**	588.4	**24%**	**-0.7%**





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

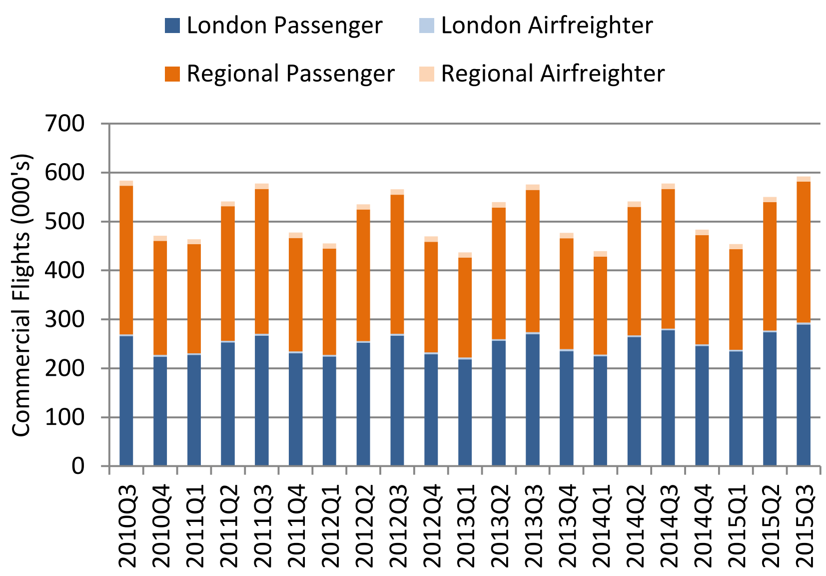
Total cargo tonnage at all UK airports was down 1.6% compared with the same quarter last year. This consisted of a decrease of 3.4% at London airports and an increase of 4.5% at regional airports. Air freighter tonnage increased by 3.7% and bellyhold cargo tonnage decreased by 4.0% compared with the same quarter last year.

The vast majority of cargo tonnage at London airports (approximately 80%) is transported in the bellyhold of passenger aircraft, which in turn comprises approximately 60-65% of all cargo tonnes transported in the UK. The weak performance of the London airports was driven by the 4.6% reduction in bellyhold cargo tonnes in Q3 2015.

On a rolling year basis, total cargo tonnage handled at UK airports was up by 0.1% compared with the year before, driven by a 1% increase in bellyhold cargo tonnage and a 2% reduction in air freighter cargo tonnage.

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

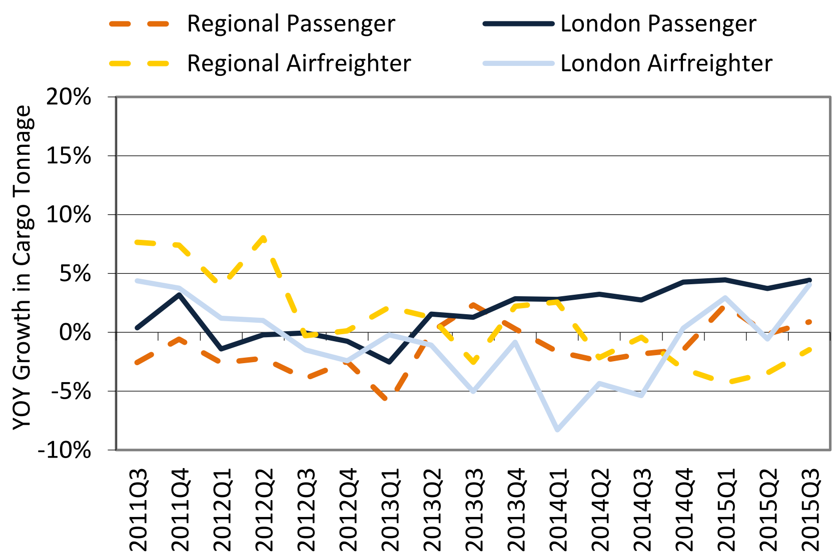
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2015		Q3 2014			Q4 14 – Q3 15		Q4 13 – Q3 14		
	Flights (000's)	% of total	Flights (000's)	% of total	% chg	Flights (000's)	% of total	Flights (000's)	% of total	% chg
Airfreighter	**14.2**	**2%**	**14.2**	**2%**	**-0.2%**	**55.9**	**3%**	**57.1**	**3%**	**-2.0%**
- London	3.4	1%	3.3	1%	4.0%	13.5	1%	13.2	1%	1.7%
- Regional	10.8	2%	10.9	2%	-1.5%	42.5	2%	43.8	2%	-3.1%
Passenger flights	**577.9**	**98%**	**563.2**	**98%**	**2.6%**	**2,023.2**	**97%**	**1,977.7**	**97%**	**2.3%**
- London	289.9	49%	277.6	48%	4.4%	1,044.2	50%	1,002.0	49%	4.2%
- Regional	288.0	49%	285.6	49%	0.9%	979.1	47%	975.7	48%	0.3%
Total flights	**592.1**	**100%**	**577.4**	**100%**	**2.5%**	**2,079.2**	**100%**	**2,034.8**	**100%**	**2.2%**
- London	293.3	50%	280.9	49%	4.4%	1,057.6	51%	1,015.3	50%	4.2%
- Regional	298.8	50%	296.5	51%	0.8%	1,021.5	49%	1,019.5	50%	0.2%



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.

The total number of commercial flights in the UK was up 2.5% compared to the same quarter last year – the combined effect of a 2.6% increase in the number of passenger flights and a 0.2% reduction in the number of freighter flights. The London airports saw an overall increase of 4.4% in the total number of flights and the regional airports experienced a increase of 0.8%.

On a rolling year basis, the total number of commercial flights was up 2.2% compared with the year before, driven by 4.2% growth at London airports. Commercial flights at regional airports rose by 0.2% over the same period.

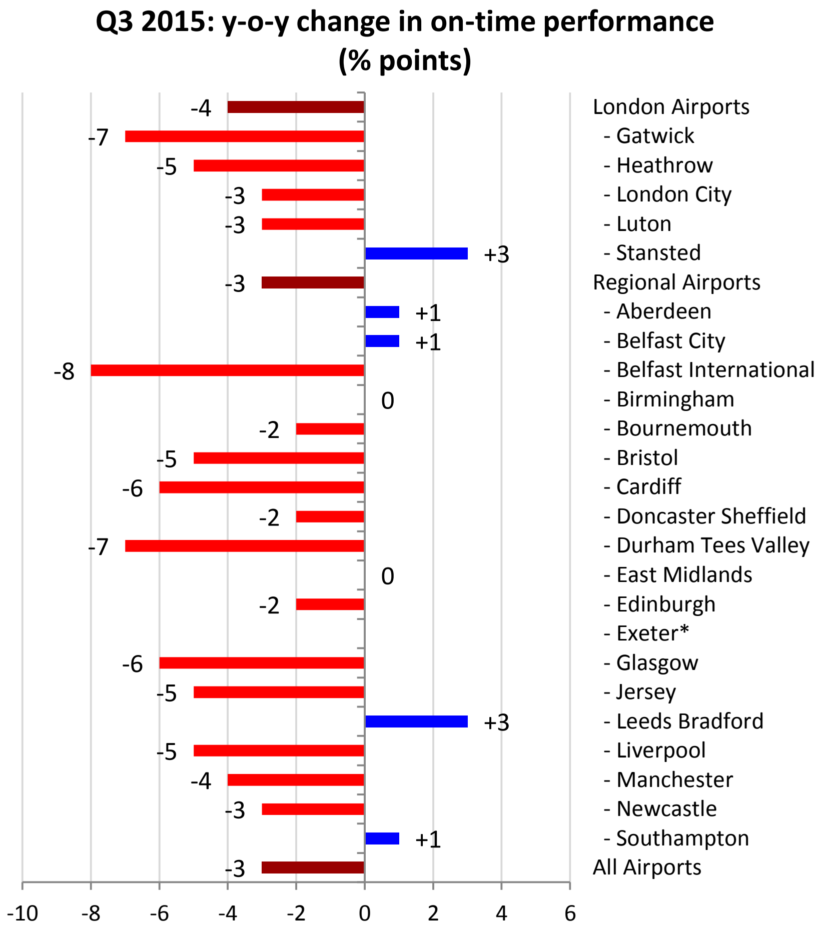


7. Punctuality of scheduled passenger flights to and from UK airports see note 6 on p.14

a. On-time performance

Matched scheduled passenger flights (000s), % of flights on-time	Q3 2015		Q3 2014		Change (% points)
	Flights (000s)	% on-time	Flights (000s)	% on-time	
London Airports	**275.0**	**69%**	**261.2**	**73%**	**-4**
- Gatwick	70.9	57%	67.0	64%	-7
- Heathrow	122.9	71%	121.5	76%	-5
- London City	19.7	82%	17.2	85%	-3
- Luton	23.8	68%	20.5	71%	-3
- Stansted	37.8	77%	35.0	74%	+3
Regional Airports	**224.2**	**77%**	**216.3**	**80%**	**-3**
- Aberdeen	13.1	82%	14.4	81%	+1
- Belfast City	10.8	82%	9.6	81%	+1
- Belfast International	8.3	78%	7.7	86%	-8
- Birmingham	22.1	79%	22.0	79%	0
- Bournemouth	2.2	83%	1.3	85%	-2
- Bristol	14.6	78%	13.8	83%	-5
- Cardiff	2.9	75%	3.0	81%	-6
- Doncaster Sheffield	0.9	76%	0.9	78%	-2
- Durham Tees Valley	1.0	82%	1.0	89%	-7
- East Midlands	9.4	81%	10.2	81%	0
- Edinburgh	28.4	76%	26.9	78%	-2
- Exeter*	2.6	80%			
- Glasgow	20.7	74%	18.9	80%	-6
- Jersey	6.8	70%	7.2	75%	-5
- Leeds Bradford	9.6	84%	9.0	81%	+3
- Liverpool	9.1	78%	8.4	83%	-5
- Manchester	41.8	73%	41.5	77%	-4
- Newcastle	10.3	81%	10.3	84%	-3
- Southampton	9.5	79%	10.2	78%	+1
All Airports	**499.1**	**73%**	**477.5**	**76%**	**-3**

*** Exeter data only available from November 2014**



Punctuality of arriving and departing passenger flights is measured by comparing actual and planned times of operation. The data covers 24 airports.

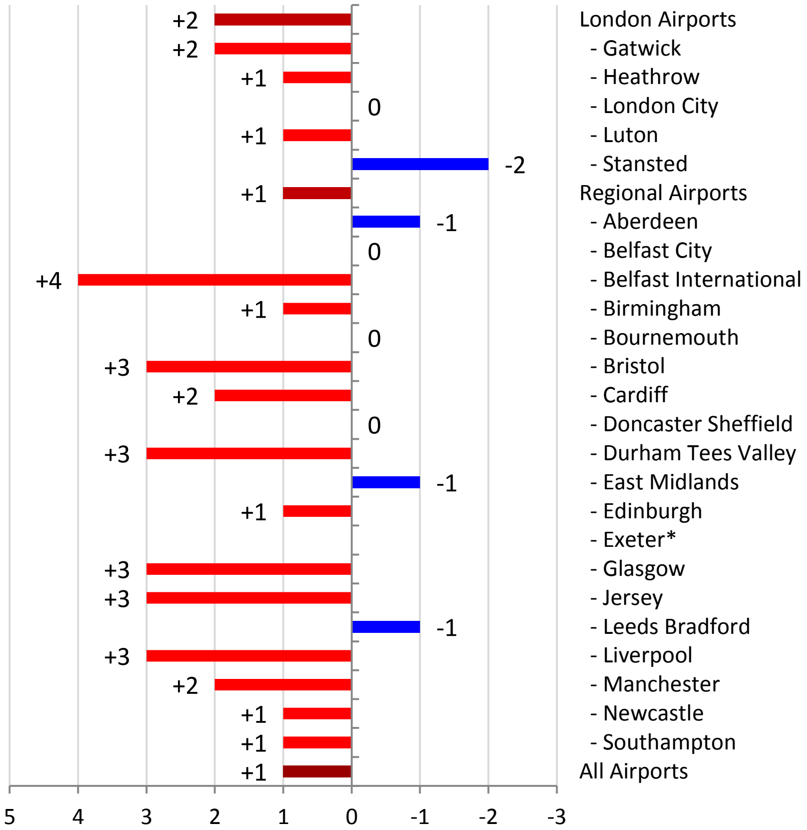
On-time performance is defined as the proportion of flights arriving or departing early or up to and including 15 minutes late. It is calculated from the scheduled on-stand time, the reported runway time and the expected time an aircraft takes to travel between a stand and the runway.

b. Average delay

Matched scheduled passenger flights (000s), Average Delay (min)	Q3 2015		Q3 2014		Change in Avg. delay (min)
	Flights (000s)	Avg. Delay (min)	Flights (000s)	Avg. Delay (min)	
London Airports	**275.0**	**17**	**261.2**	**15**	**+2**
- Gatwick	70.9	23	67.0	21	+2
- Heathrow	122.9	15	121.5	14	+1
- London City	19.7	9	17.2	9	0
- Luton	23.8	17	20.5	16	+1
- Stansted	37.8	12	35.0	14	-2
Regional Airports	**224.2**	**13**	**216.3**	**12**	**+1**
- Aberdeen	13.1	10	14.4	11	-1
- Belfast City	10.8	11	9.6	11	0
- Belfast International	8.3	13	7.7	9	+4
- Birmingham	22.1	13	22.0	12	+1
- Bournemouth	2.2	10	1.3	10	0
- Bristol	14.6	13	13.8	10	+3
- Cardiff	2.9	14	3.0	12	+2
- Doncaster Sheffield	0.9	14	0.9	14	0
- Durham Tees Valley	1.0	10	1.0	7	+3
- East Midlands	9.4	10	10.2	11	-1
- Edinburgh	28.4	13	26.9	12	+1
- Exeter*	2.6	12			
- Glasgow	20.7	15	18.9	12	+3
- Jersey	6.8	17	7.2	14	+3
- Leeds Bradford	9.6	10	9.0	11	-1
- Liverpool	9.1	13	8.4	10	+3
- Manchester	41.8	15	41.5	13	+2
- Newcastle	10.3	11	10.3	10	+1
- Southampton	9.5	14	10.2	13	+1
All Airports	**499.1**	**15**	**477.5**	**14**	**+1**

*** Exeter data only available from November 2014**

Q3 2015: y-o-y change in average delay (min)



Average delay per flight across the 24 monitored airports was 15 minutes for Q3 2015. This represented an increase of one minute against the same quarter last year.

Stansted topped the airports that saw an improvement in performance, with two minutes shaved off average delays compared with Q3 2014.

Belfast International saw the biggest increase in average delay in Q3 2015 compared with the same quarter last year (+4 minutes), although this was against a relatively good performance last year (9 minutes of average delay).

The airport with the least average delay in Q3 2015 was London City (9 minutes), whilst Gatwick saw the longest average delay of the 24 monitored airports (23 minutes).

Explanatory 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, this category includes 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.