Aviation Trends

Quarter 3 2018

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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.

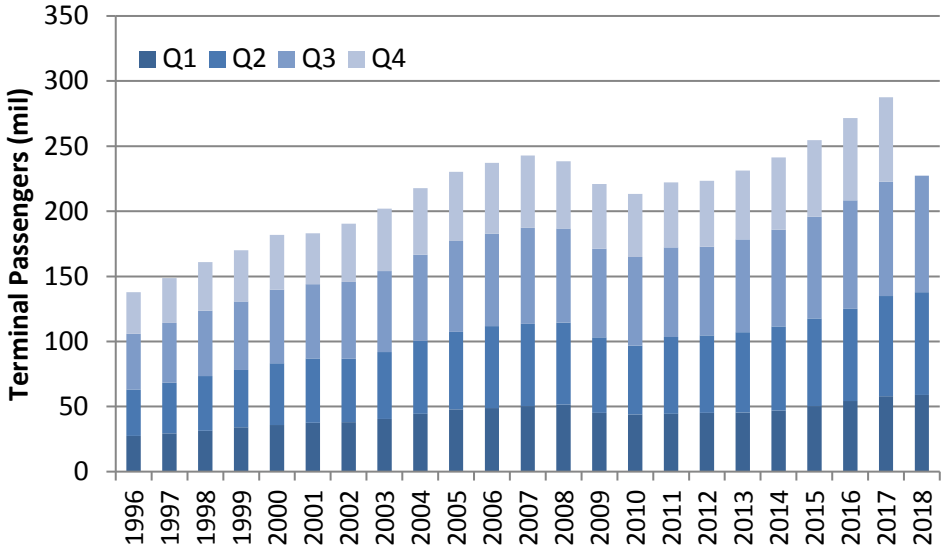
The Aviation Trends series is available at www.caa.co.uk/aviationtrends, part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications. Please note that historic numbers may be subject to minor change as the result of prior period adjustments.[1] Due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

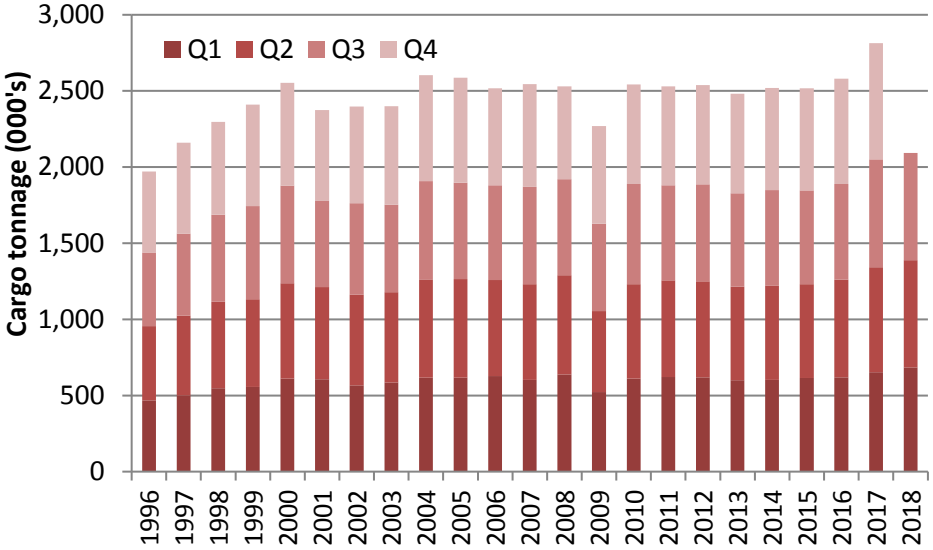
[1] Also, in editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. These islands are not formally part of the UK, and as we wish to present only the trends at UK airports, their figures are now excluded from the UK reporting airports,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

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

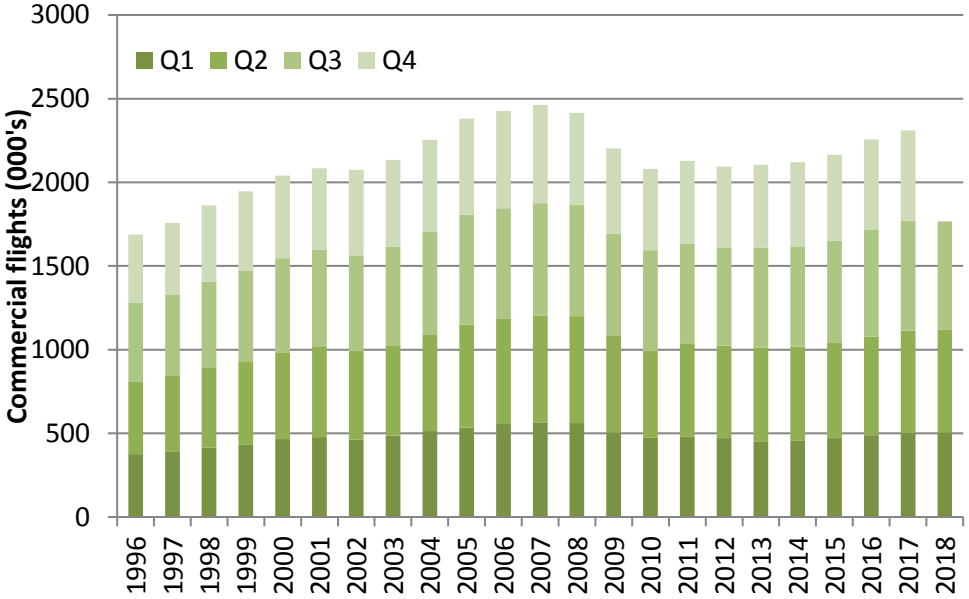
a. Terminal passengers



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.

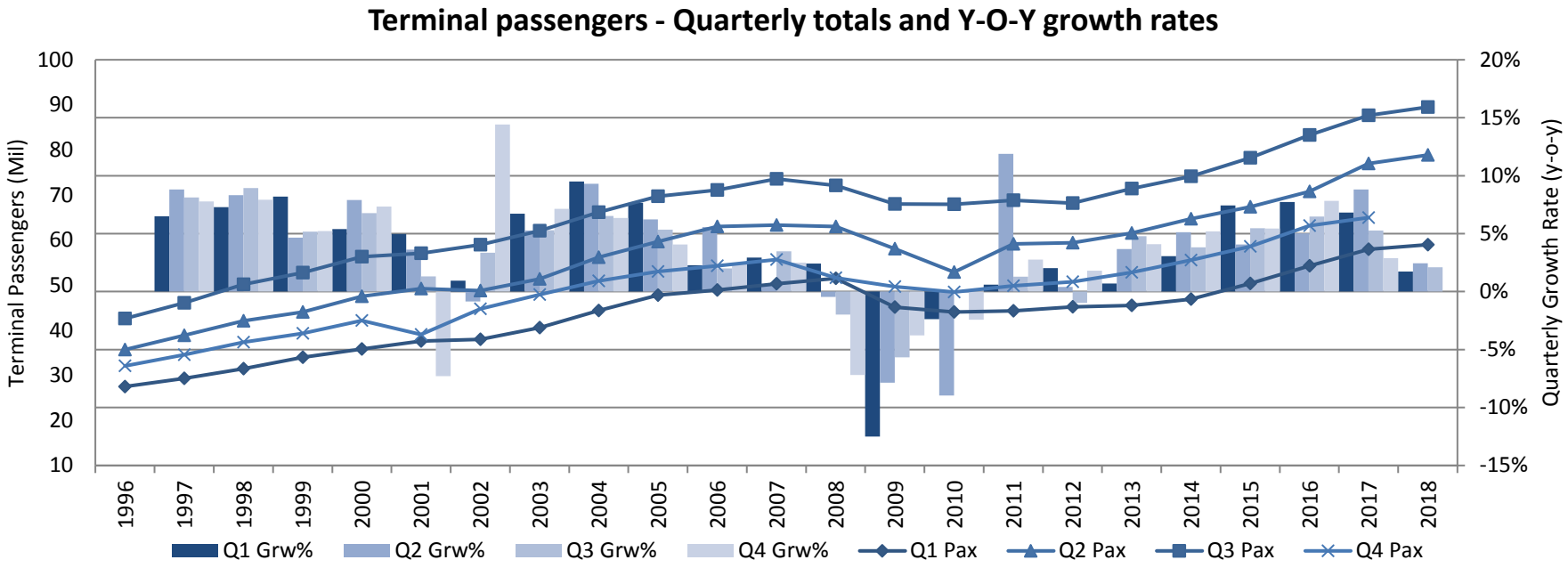
On pages 4 to 6, the top charts show traffic volume in each quarter (left axis), and the corresponding year-on-year quarterly growth rates (right axis). The bottom charts show the rolling annual total traffic in each quarter (left axis), and the year-on-year percentage growth of the rolling annual total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

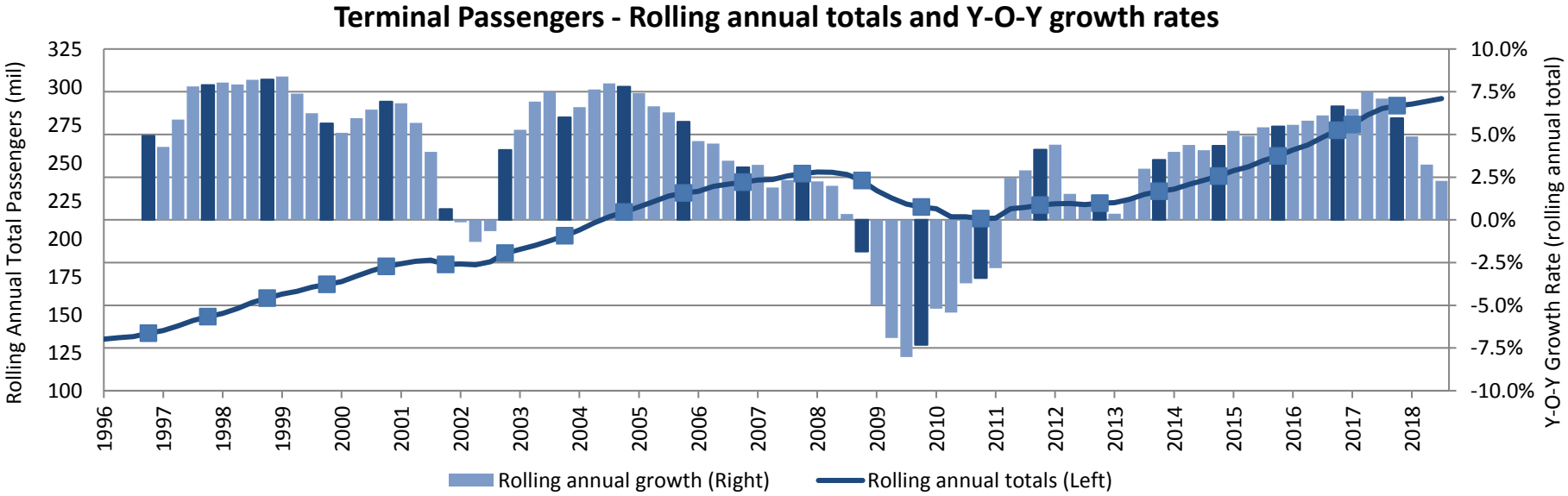
In Q3 2018, UK airports handled 90 million terminal passengers, representing 2.1% growth against the same quarter in the previous year and a new high in terms of the number of passengers flown in Q3 of any previous year. On a rolling year basis, terminal passengers also hit a new record (292m pax) in Q3 2018, surpassing the previous rolling 12-month high (291m pax) set in Q2 2018.

Q3 2018 saw 650 thousand commercial flights, representing a 0.9% decline against the same quarter in the previous year. For the rolling 12 months to Q3 2018, commercial flights totalled 2.31 million, representing growth of 0% against the 12-month period the year before (Q4 2016 to Q3 2017).

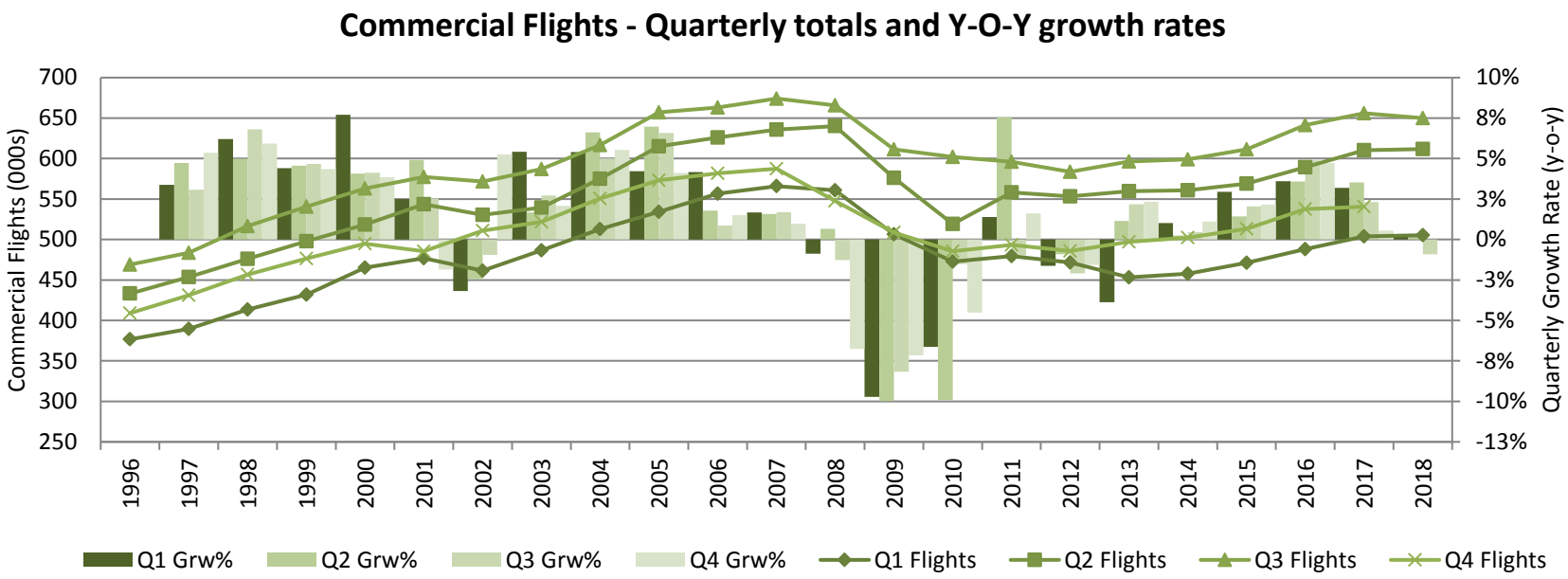
Q3 2018 also saw 705 thousand tonnes of cargo pass through UK airports, representing -0.4% growth on Q3 2017. For the rolling 12 months to Q3 2018, 2.86 million tonnes of cargo were handled at UK airports, up 4.2% on the 12-month period the year before (Q4 2016 to Q3 2017).

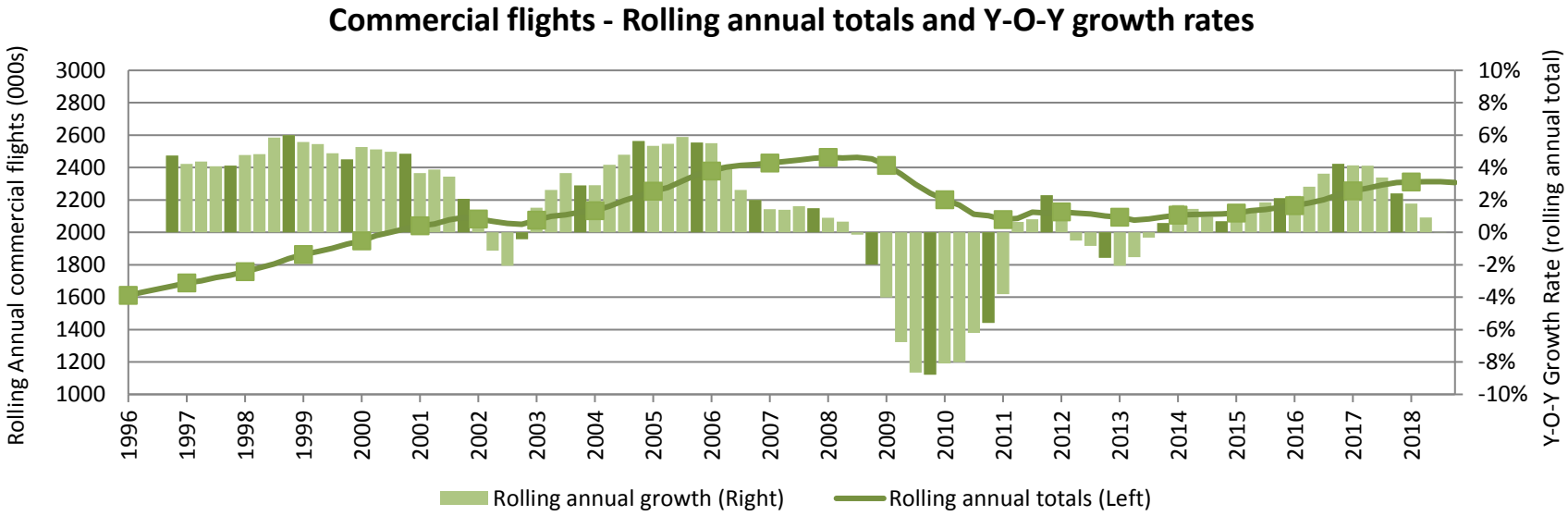
a. Terminal passengers



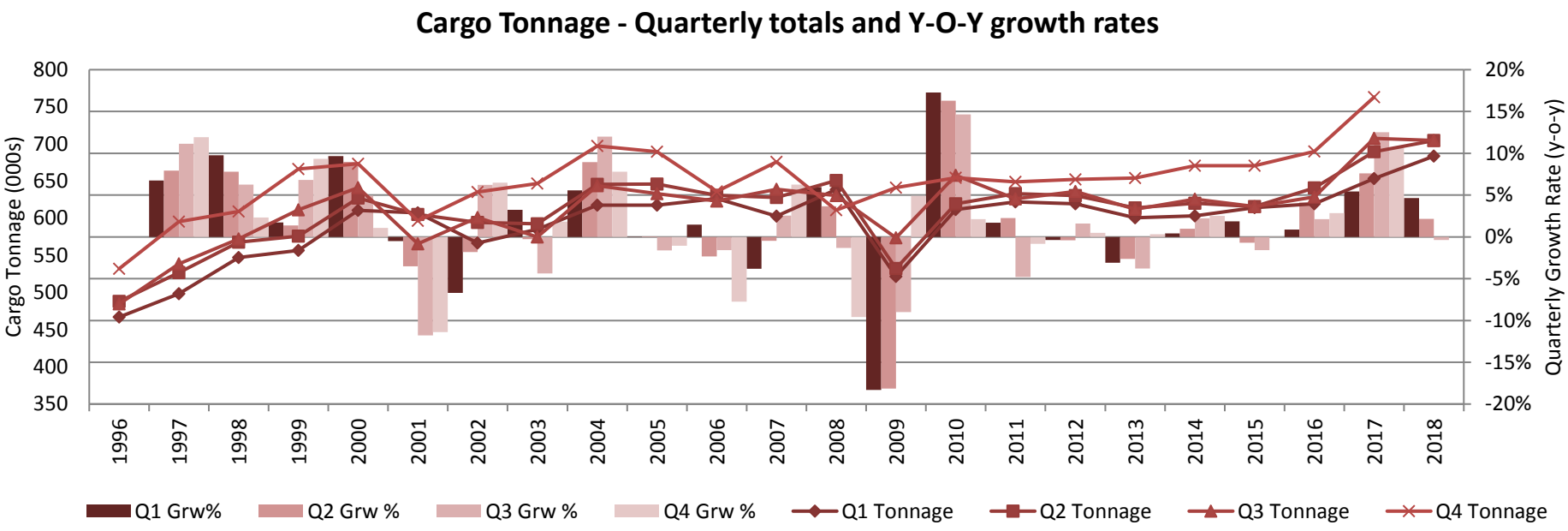


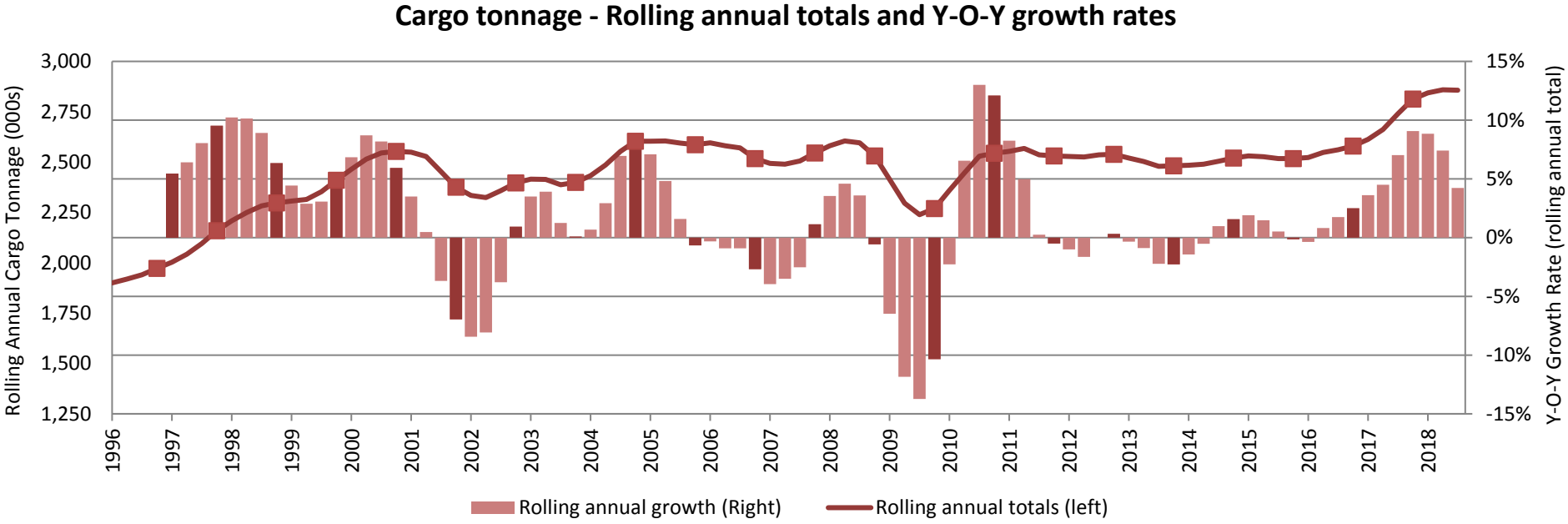
b. Commercial flights





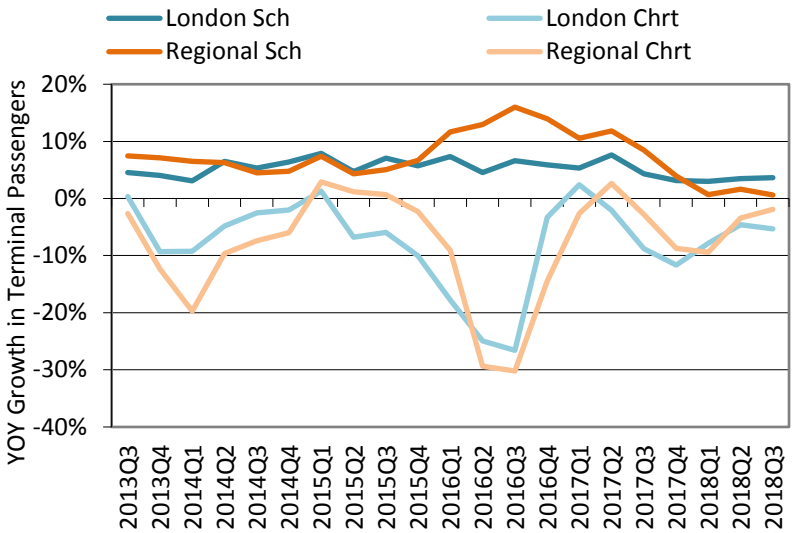
c. Cargo tonnage

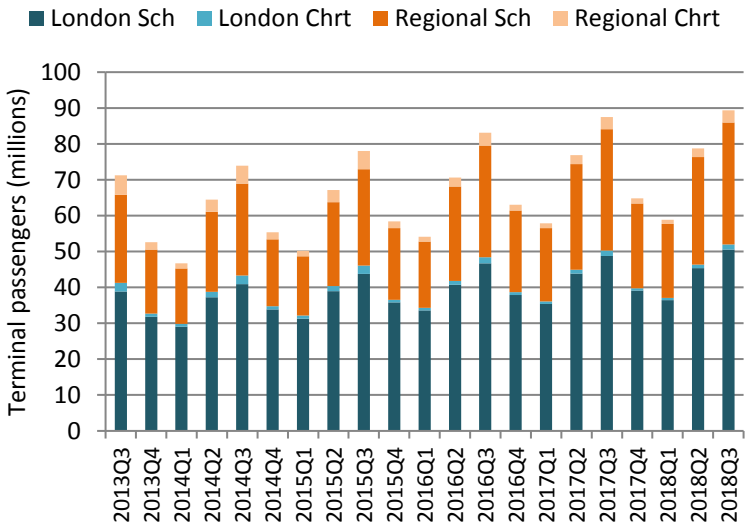




2. Terminal passengers at UK airports see note 5 on p.14

Pax (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2018		Q3 2017			Q4 17 – Q3 18		Q4 16 – Q3 17		
	Pax (Mil)	% of total	Pax (Mil)	% of total	% chg	Pax (Mill)	% of total	Pax (Mil)	% of total	% chg
London Airports	**52.0**	**58%**	**50.3**	**57%**	**3.4%**	**175.2**	**60%**	**169.9**	**60%**	**3.1%**
- Scheduled	50.5	57%	48.7	56%	3.7%	171.5	59%	165.9	58%	3.4%
- Charter	1.4	2%	1.5	2%	-5.3%	3.8	1%	4.0	1%	-6.8%
Regional Airports	**37.4**	**42%**	**37.2**	**43%**	**0.4%**	**116.5**	**40%**	**115.2**	**40%**	**1.1%**
-Scheduled	34.0	38%	33.8	39%	0.6%	108.1	37%	106.4	37%	1.6%
- Charter	3.4	4%	3.4	4%	-1.9%	8.4	3%	8.8	3%	-4.7%
All Airports	**89.3**	**100%**	**87.5**	**100%**	**2.1%**	**291.8**	**100%**	**285.2**	**100%**	**2.3%**
-Scheduled	84.5	95%	82.6	94%	2.4%	279.6	96%	272.3	95%	2.7%
- Charter	4.8	5%	4.9	6%	-3.0%	12.2	4%	12.8	5%	-5.3%





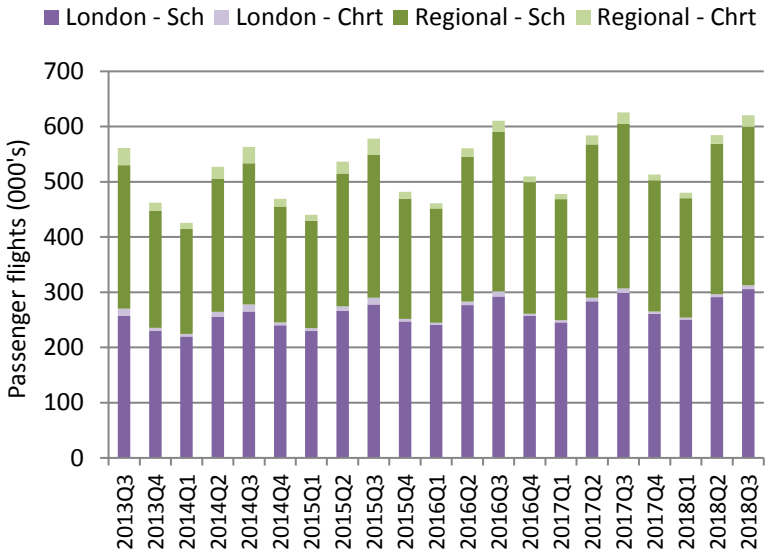
UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in this section therefore exclude transit passengers – those who remain on-board aircraft which land at a UK airport and then continue onto another destination.

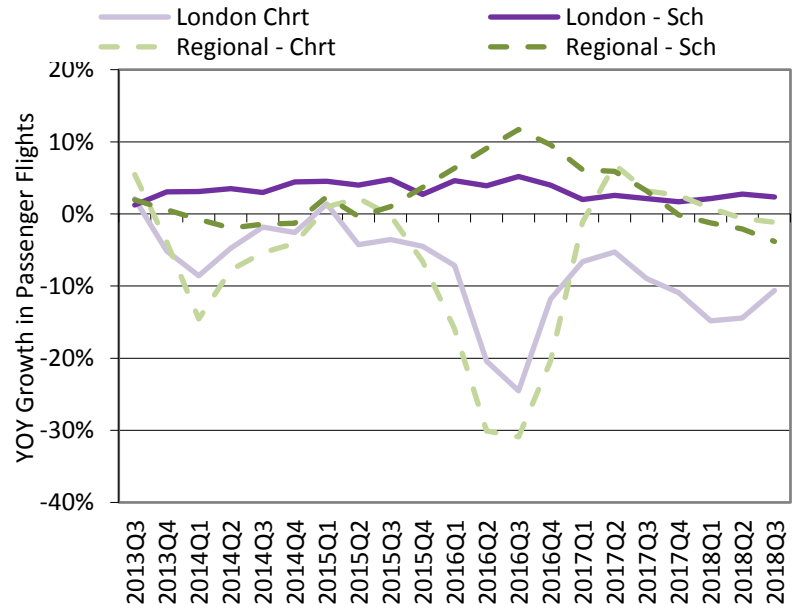
In Q3 2018, London airports handled 3.4% more passengers, and regional airports 0.4% more than in the same quarter last year. Scheduled passengers grew by 2.4% overall. Charter traffic on the other hand declined by 3%.

For the rolling 12 months to Q3 2018, terminal passengers were 3.1% higher at London airports and 1.1% higher at regional airports, respectively compared to the previous rolling 12-month period (Q4 2016 to Q3 2017). Overall for the period, UK airports handled 292m passengers in total, up by 2.3% on the previous 12 months.

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

Flights (000's)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2018		Q3 2017			Q4 17 – Q3 18		Q4 16 – Q3 17		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
London Airports	**312.9**	**50%**	**306.8**	**49%**	**2.0%**	**1,128.6**	**51%**	**1,107.1**	**50%**	**1.9%**
- Scheduled	305.4	49%	298.4	48%	2.3%	1,108.5	50%	1,084.2	49%	2.2%
- Charter	7.5	1%	8.4	1%	-10.6%	20.1	1%	22.9	1%	-12.4%
Regional Airports	**307.4**	**50%**	**319.0**	**51%**	**-3.6%**	**1,069.7**	**49%**	**1,090.1**	**50%**	**-1.9%**
- Scheduled	286.7	46%	298.0	48%	-3.8%	1,013.1	46%	1,033.4	47%	-2.0%
- Charter	20.8	3%	21.0	3%	-1.2%	56.7	3%	56.7	3%	0.0%
All Airports	**620.3**	**100%**	**625.8**	**100%**	**-0.9%**	**2,198.3**	**100%**	**2,197.2**	**100%**	**0.0%**
- Scheduled	592.1	95%	596.5	95%	-0.7%	2,121.6	97%	2,117.6	96%	0.2%
- Charter	28.2	5%	29.4	5%	-3.9%	76.7	3%	79.6	4%	-3.6%





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

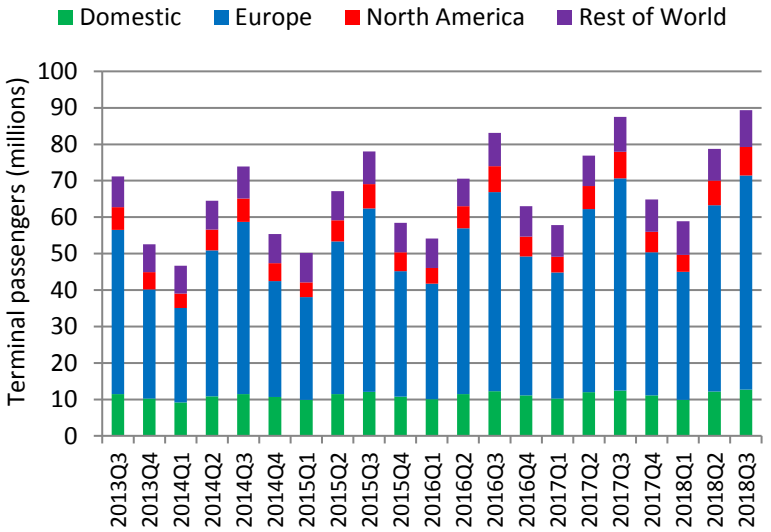
In Q3 2018, the number of total passenger flights handled at UK airports decreased by 0.9% to 620 thousand. There were 0.7% fewer scheduled flights and 3.9% fewer charter flights compared to the same quarter last year.

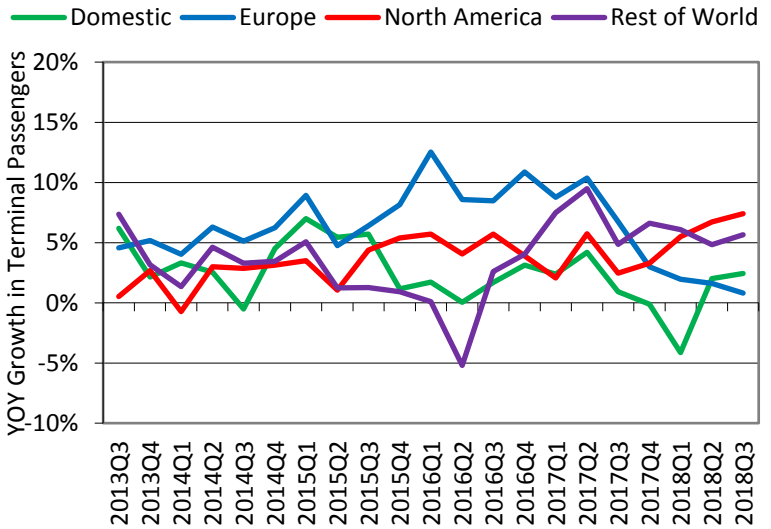
For the rolling 12 months to Q3 2018, the number of passenger flights handled by UK airports reached 2.2 million. The number of scheduled passenger flights increased by 0.2% whilst the number of charter passenger flights fell by 3.6% against the previous year.

Looking at the regional split in Q3 2018, there were 2% more passenger flights at the London airports and 3.6% fewer passenger flights at regional airports when compared to the same quarter last year. For the rolling 12 months to Q3 2018, the number of flights was up by 1.9% at London airports and down 1.9% 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 2018		Q3 2017			Q4 17 – Q3 18		Q4 16 – Q3 17		
	Pax (Mill)	% of total	Pax (Mill)	% of total	% chg	Pax (Mill)	% of total	Pax (Mill)	% of total	% chg
Domestic	**12.7**	**14%**	**12.4**	**14%**	**2.4%**	**45.8**	**16%**	**45.7**	**16%**	**0.2%**
- Scheduled	12.6	14%	12.3	14%	2.5%	45.5	16%	45.4	16%	0.1%
- Charter	0.1	0%	0.1	0%	-7.3%	0.3	0%	0.3	0%	23.7%
Europe	**58.8**	**66%**	**58.3**	**67%**	**0.8%**	**184.3**	**63%**	**181.2**	**64%**	**1.7%**
- Scheduled	54.3	61%	53.8	61%	1.0%	173.7	60%	170.3	60%	2.0%
- Charter	4.4	5%	4.5	5%	-2.0%	10.5	4%	10.9	4%	-3.3%
North America	**7.8**	**9%**	**7.2**	**8%**	**7.4%**	**24.7**	**8%**	**23.4**	**8%**	**5.9%**
- Scheduled	7.7	9%	7.1	8%	7.9%	24.6	8%	23.2	8%	6.2%
- Charter	0.1	0%	0.1	0%	-30.7%	0.2	0%	0.2	0%	-24.5%
Rest of World	**10.1**	**11%**	**9.6**	**11%**	**5.7%**	**36.9**	**13%**	**34.9**	**12%**	**5.8%**
- Scheduled	9.9	11%	9.3	11%	5.9%	35.8	12%	33.5	12%	7.0%
- Charter	0.2	0%	0.2	0%	-5.9%	1.1	0%	1.4	1%	-22.7%
All Airports	**89.3**	**100%**	**87.5**	**100%**	**2.1%**	**291.8**	**100%**	**285.2**	**100%**	**2.3%**
- Scheduled	84.5	95%	82.6	94%	2.4%	279.6	96%	272.3	96%	2.7%
- Charter	4.8	5%	4.9	6%	-2.9%	12.2	4%	12.8	4%	-5.3%



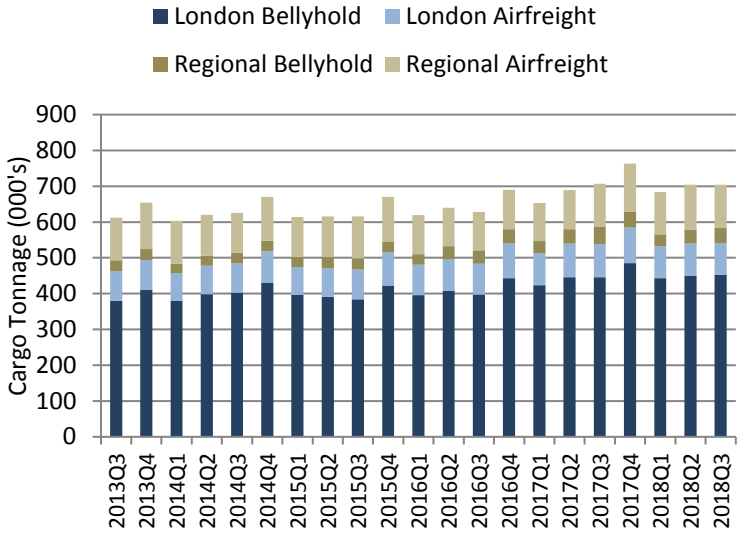


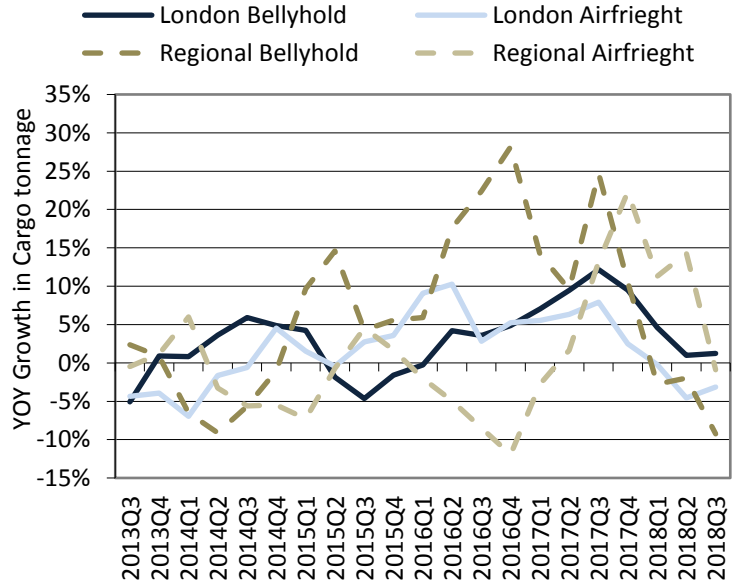
Compared to the same quarter last year, total passengers (excluding those going to/from North Sea oil rigs) increased by 2.1% across all UK reporting airports in Q3 2018. North America saw the strongest growth (+7.4%), while Europe saw the weakest growth (0.8%). There were 2.4% more passengers travelling on domestic routes while 5.7% more passengers travelled to the rest of the world.

For the rolling 12 months to Q3 2018, the total number of passengers was up by 2.3%. This was made up of an increase of 5.9%, 5.8% and 1.7% and 0.2% of passengers travelling to and from North America, the rest of the world, Europe and Domestic destinations, respectively.

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

Tonnes (000's)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2018		Q3 2017			Q4 17 – Q3 18		Q4 16 – Q3 17		
	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	**210.2**	**30%**	**214.2**	**30%**	**-1.9%**	**864.0**	**30%**	**817.9**	**30%**	**5.6%**
- London	90.0	13%	92.9	13%	-3.1%	366.7	13%	371.7	14%	-1.3%
- Regional	120.2	17%	121.3	17%	-0.9%	497.3	17%	446.2	16%	11.4%
Bellyhold cargo	**494.2**	**70%**	**492.9**	**70%**	**0.3%**	**1,991.0**	**70%**	**1,921.1**	**70%**	**3.6%**
- London	451.7	64%	446.0	63%	1.3%	1,830.8	64%	1,759.1	64%	4.1%
- Regional	42.6	6%	46.9	7%	-9.2%	160.1	6%	162.0	6%	-1.2%
Total cargo	**704.4**	**100%**	**707.1**	**100%**	**-0.4%**	**2,854.9**	**100%**	**2,739.1**	**100%**	**4.2%**
- London	541.6	77%	538.9	76%	0.5%	2,197.5	77%	2,130.8	78%	3.1%
- Regional	162.8	23%	168.2	24%	-3.2%	657.4	23%	608.3	22%	8.1%





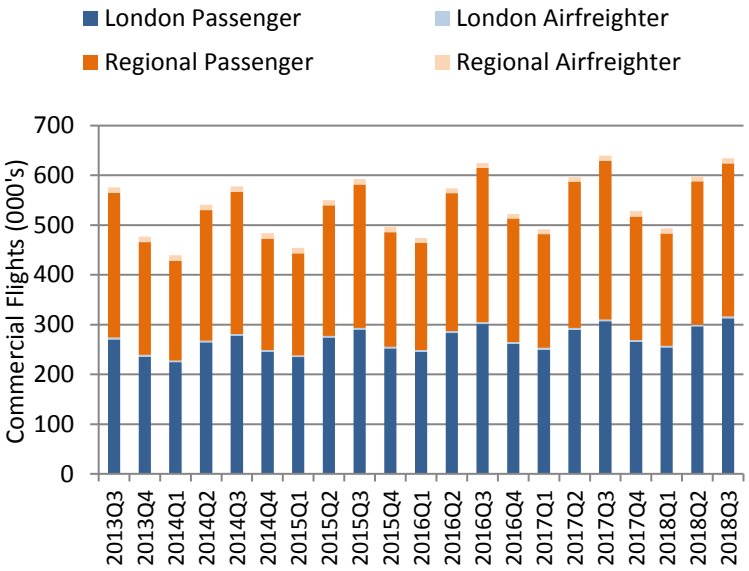
Air cargo – freight and mail – is transported into and out of the UK on air freighters and in the bellyhold of passenger aircraft.

In Q3 2018, total cargo tonnage at UK airports declined by 0.4% compared with the same quarter last year. At London airports cargo tonnage remained increased by 0.5% while cargo tonnage at regional airports declined by 3.2%. Air freighter tonnage decreased by 1.9% whilst bellyhold cargo tonnage increased by 0.3% over the same period.

For the rolling 12 months to Q3 2018, total cargo tonnage handled at UK airports grew by 4.2% compared with the previous 12 month period (Q4 2016 to Q3 2017). London airports grew by 3.1% while regional airports grew by 8.1%. In this period bellyhold cargo increased by 3.6% while air freighter grew by 5.6%.

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

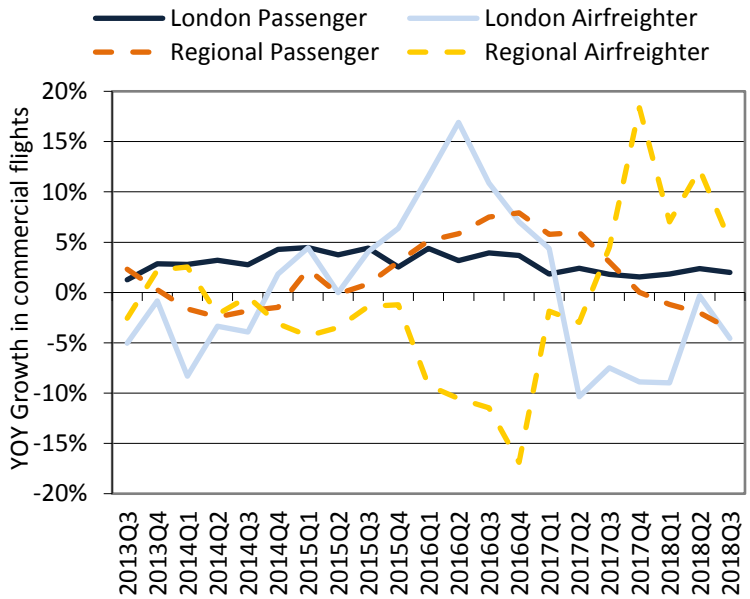
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2018		Q3 2017			Q4 17 – Q3 18		Q4 16 – Q3 17		
	Flights (000's)	% of total	Flights (000's)	% of total	% chg	Flights (000's)	% of total	Flights (000's)	% of total	% chg
Airfreighter	**13.9**	**2%**	**13.6**	**2%**	**2.6%**	**55.2**	**2%**	**52.2**	**2%**	**5.8%**
- London	3.4	1%	3.6	1%	-4.6%	14.1	1%	14.9	1%	-5.9%
- Regional	10.5	2%	10.0	2%	5.1%	41.1	2%	37.2	2%	10.5%
Passenger flights	**620.3**	**98%**	**625.8**	**98%**	**-0.9%**	**2,198.6**	**98%**	**2,197.3**	**98%**	**0.1%**
- London	312.9	49%	306.8	48%	2.0%	1,128.7	50%	1,107.2	49%	1.9%
- Regional	307.4	48%	319.0	50%	-3.6%	1,069.9	47%	1,090.1	48%	-1.9%
Total flights	**634.2**	**100%**	**639.4**	**100%**	**-0.8%**	**2,253.8**	**100%**	**2,249.5**	**100%**	**0.2%**
- London	316.3	50%	310.4	49%	1.9%	1,142.8	51%	1,122.1	50%	1.8%
- Regional	317.9	50%	329.0	51%	-3.4%	1,111.0	49%	1,127.3	50%	-1.4%



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 down 0.8% in Q3 2018 compared to the same quarter last year – the combined effect of a 0.9% decrease in the number of passenger flights and an 2.6% increase in the number of freighter flights. Overall for the same quarter, London airports and regional airports grew at 1.9% and -3.4% respectively.

For the rolling 12 months to Q3 2018, the total number of commercial flights reached 2.25m, up by 0.2% compared with the previous rolling 12 months (Q4 2016 to Q3 2017). Commercial flights at London airports rose by 1.8% while at regional airports there was decrease of was 1.4%.



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 2018	
	Flights (000s)	% on-time
London	**299.8**	**66%**
Gatwick	77.3	61%
Heathrow	123.6	76%
London City	19.7	74%
Luton	29.2	62%
Stansted	50.0	50%
Regional	258.3	72%
Aberdeen	10.9	75%
Belfast City (George Best)	9.5	84%
Belfast International	11.5	72%
Birmingham	26.6	66%
Bournemouth	0.9	80%
Bristol	12.0	63%
Cardiff Wales	3.8	78%
Doncaster Sheffield	2.0	73%
Durham Tees Valley	0.8	75%
East Midlands International	10.3	76%
Edinburgh	33.5	69%
Exeter	3.4	80%
Glasgow	23.3	72%
Jersey	6.8	72%
Leeds Bradford	9.7	79%
Liverpool (John Lennon)	10.0	79%
Manchester	52.2	70%
Newcastle	13.1	75%
Southampton	9.3	76%
Grand Total	558.1	69%

Starting from January 2018 we have introduced a new method for calculating the measure of punctuality to enhance the quality and improve the relevance to users of the data. Consequently, we are currently unable to report year-on-year changes in on-time performance and average delay. We will resume reporting year-on-year changes in Q1 2019 once we have sufficient data to do so.

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.

b. Average delay

Matched scheduled passenger flights (000s), Average Delay (min)	Q3 2018	
	Flights (000s)	Avg. Delay (min)
London	**299.8**	**20**
Gatwick	77.3	23
Heathrow	123.6	14
London City	19.7	13
Luton	29.2	22
Stansted	50.0	31
Regional	258.3	**17**
Aberdeen	10.9	15
Belfast City (George Best)	9.5	9
Belfast International	11.5	18
Birmingham	26.6	20
Bournemouth	0.9	12
Bristol	12.0	21
Cardiff Wales	3.8	13
Doncaster Sheffield	2.0	16
Durham Tees Valley	0.8	16
East Midlands International	10.3	14
Edinburgh	33.5	18
Exeter	3.4	12
Glasgow	23.3	17
Jersey	6.8	16
Leeds Bradford	9.7	13
Liverpool (John Lennon)	10.0	13
Manchester	52.2	18
Newcastle	13.1	15
Southampton	9.3	14
Grand Total	558.1	**18**

Average delay per flight across the 24 monitored airports was 18 minutes for Q3 2018.

The airport with the shortest average delay in Q3 2018 was Belfast City (9 minutes). The longest average delay was seen at Stansted (31 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.
   - Further information and supporting notes on the methodology used to calculate delays can be accessed here: http://www.caa.co.uk/Data-and-analysis/UK-aviation-market/Flight-reliability/Datasets/Punctuality-data/Punctuality-statistics-notes