

# Aviation Trends

## Quarter 1 2012



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## Introduction

Welcome to Aviation Trends. Every quarter we update key figures which summarise the levels of activity at the UK's airports. Each edition also includes a section entitled 'Did you know?' which aims to present interesting facts derived from the various data sources available to the CAA; this time we examine trends in international cargo tonnage at UK airports by world region.

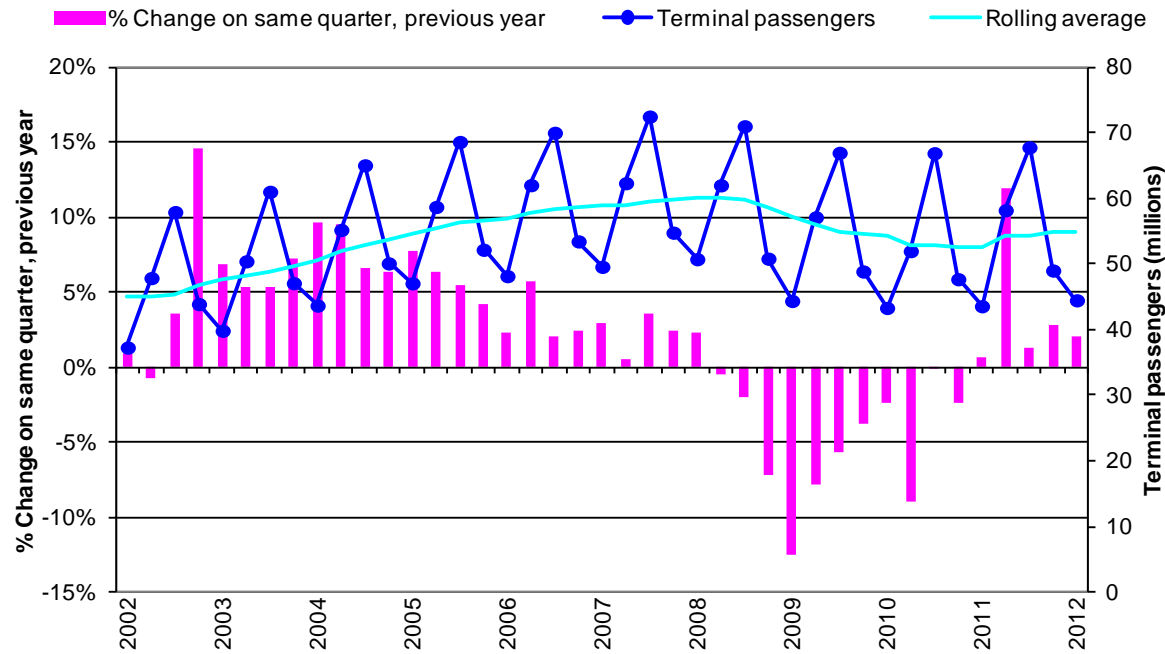
In this edition of aviation trends, we show a mild increase in the number of passengers handled at all UK airports, and a small decline in all commercial flights and cargo tonnage in quarter 1 2012.

The Aviation Trends series is available at [www.caa.co.uk/aviationtrends](http://www.caa.co.uk/aviationtrends), part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications, which provide more detailed information on UK aviation activity. Please note that historic numbers may be subject to minor change as the result of prior period adjustments. Due to rounding of figures, there may be an apparent slight discrepancy between the sum of the constituent items and the total as shown.

For a list of all statistics available on the CAA website, see [www.caa.co.uk/statistics](http://www.caa.co.uk/statistics).

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

## 1. Historical overview - Terminal passengers at UK airports by quarter<sup>6,11</sup>



Source: CAA Airport Statistics

Plotting quarterly passenger data over the last ten years shows both seasonal and annual trends in UK aviation activity.

The dark blue line shows the number of terminal passengers at UK airports in each quarter (on the right axis). The bright blue line shows the same, but for the rolling annual average in each quarter.

The pink bars show the percentage growth on the previous year's number in the same quarter (on the left axis).

In quarter 1 2012, UK airports handled 44.6 million terminal passengers, a moderate improvement of 2.1% compared with the same quarter last year.

## 2. Terminal passengers at UK airports<sup>5,6,7,11</sup>

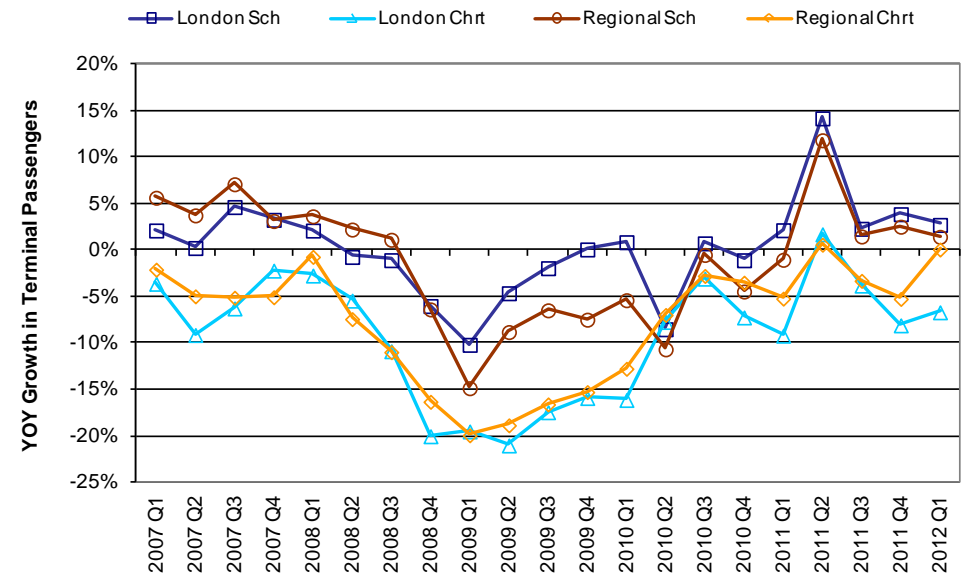
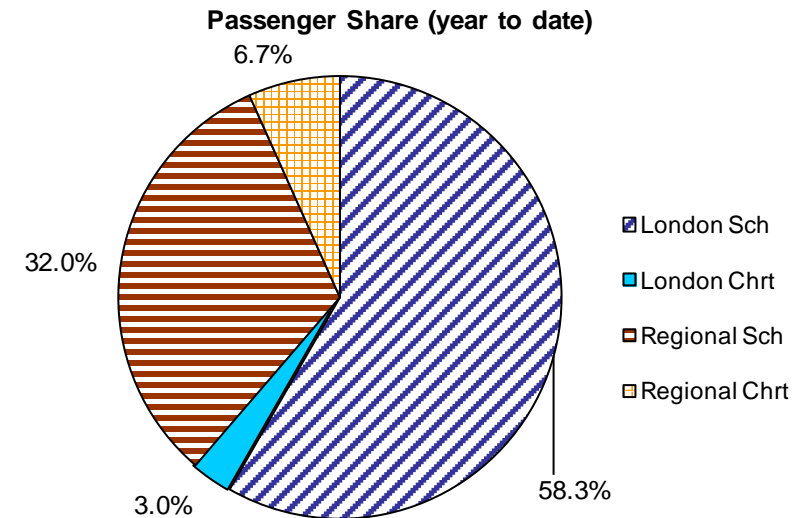
Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2012		Q1 2011		+/- %	Q2 11 - Q1 12		Q2 10 - Q1 11		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
<b>London Airports</b>	<b>28.5</b>	<b>64%</b>	<b>27.8</b>	<b>64%</b>	<b>2.4%</b>	<b>134.3</b>	<b>61%</b>	<b>127.6</b>	<b>61%</b>	<b>5.2%</b>
- Scheduled	27.5	62%	26.8	62%	2.8%	127.7	58%	120.8	58%	5.7%
- Charter	1.0	2%	1.0	2%	-6.6%	6.6	3%	6.8	3%	-3.4%
<b>Regional Airports</b>	<b>15.9</b>	<b>36%</b>	<b>15.7</b>	<b>36%</b>	<b>1.3%</b>	<b>84.8</b>	<b>39%</b>	<b>82.2</b>	<b>39%</b>	<b>3.2%</b>
- Scheduled	14.0	32%	13.8	32%	1.5%	70.1	32%	67.2	32%	4.4%
- Charter	1.9	4%	1.9	4%	0.1%	14.7	7%	15.0	7%	-2.0%
<b>All Airports</b>	<b>44.4</b>	<b>100%</b>	<b>43.5</b>	<b>100%</b>	<b>2.1%</b>	<b>219.1</b>	<b>100%</b>	<b>209.8</b>	<b>100%</b>	<b>4.4%</b>
- Scheduled	41.5	94%	40.6	93%	2.4%	197.8	90%	188.0	90%	5.2%
- Charter	2.9	6%	2.9	7%	-2.2%	21.3	10%	21.8	10%	-2.5%

Source: CAA Airport Statistics<sup>3</sup>

UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in the table and graph on this page therefore exclude transit passengers – those who remain aboard aircraft which land at a UK airport and then depart for another destination.

In quarter 1 2012, the number of passengers across all UK airports rose by 2.1% compared to quarter 1 2011. On a rolling year basis, it was 4.4% higher than the year before.

Once again, the London airports saw greater passenger growth than the regional airports, a sequence that began in quarter 4 of 2008.



### 3. Passenger flights to and from UK airports<sup>5,7,11</sup>

Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2012		Q1 2011		+/- %	Q2 11 - Q1 12		Q2 10 - Q1 11		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>London Airports</b>	<b>224.2</b>	<b>53%</b>	<b>227.5</b>	<b>53%</b>	<b>-1.4%</b>	<b>974.7</b>	<b>51%</b>	<b>947.1</b>	<b>51%</b>	<b>2.9%</b>
- Scheduled	218.7	52%	221.3	52%	-1.2%	939.3	50%	910.6	49%	3.1%
- Charter	5.5	1%	6.2	1%	-10.5%	35.4	2%	36.4	2%	-2.9%
<b>Regional Airports</b>	<b>195.9</b>	<b>47%</b>	<b>200.9</b>	<b>47%</b>	<b>-2.5%</b>	<b>918.4</b>	<b>49%</b>	<b>917.2</b>	<b>49%</b>	<b>0.1%</b>
- Scheduled	183.8	44%	188.7	44%	-2.6%	834.9	44%	831.6	45%	0.4%
- Charter	12.1	3%	12.1	3%	0.0%	83.5	4%	85.5	5%	-2.4%
<b>All Airports</b>	<b>420.1</b>	<b>100%</b>	<b>428.3</b>	<b>100%</b>	<b>-1.9%</b>	<b>1,893.1</b>	<b>100%</b>	<b>1,864.3</b>	<b>100%</b>	<b>1.5%</b>
- Scheduled	402.5	96%	410.1	96%	-1.8%	1,774.2	94%	1,742.3	93%	1.8%
- Charter	17.6	4%	18.3	4%	-3.5%	118.9	6%	122.0	7%	-2.5%

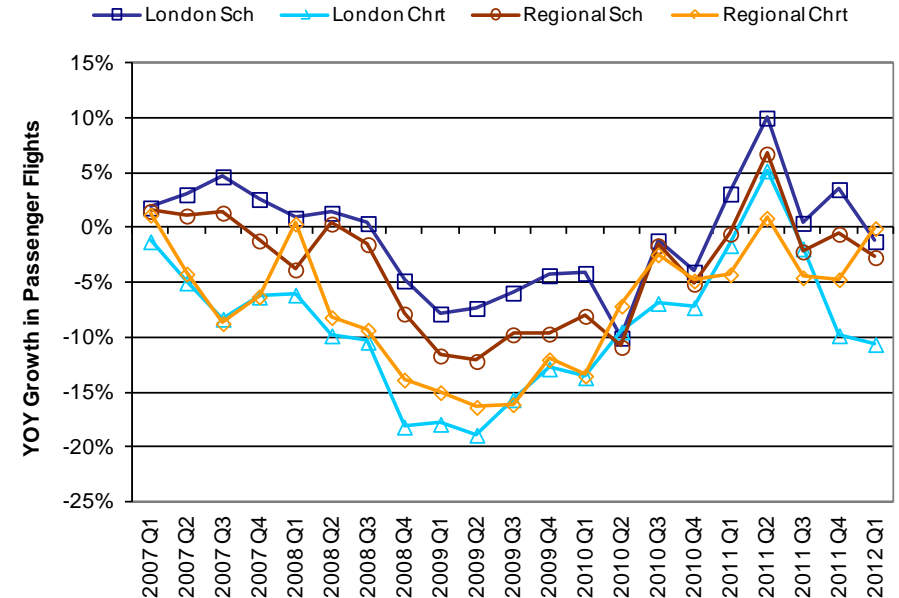
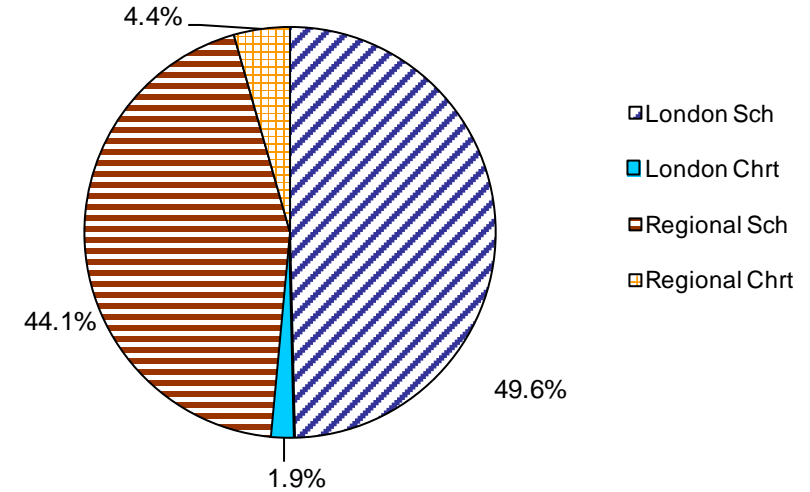
Source: CAA Airport Statistics

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

Compared to quarter 1 2011, the number of passenger flights at all UK airports decreased by 1.9% in quarter 1 2012. The number of scheduled flights was down 1.8% and the number of charter flights was down 3.5%. On a rolling year basis, there were 1.8% more scheduled flights and 2.5% fewer charter flights across all UK airports.

There were 1.4% fewer flights at London airports and 2.5% fewer flights at regional airports in quarter 1 2012 than in the same period in 2011. On a rolling year basis, the number of flights grew by 2.9% and 0.1% at London and regional airports respectively.

Flight Share (year to date)

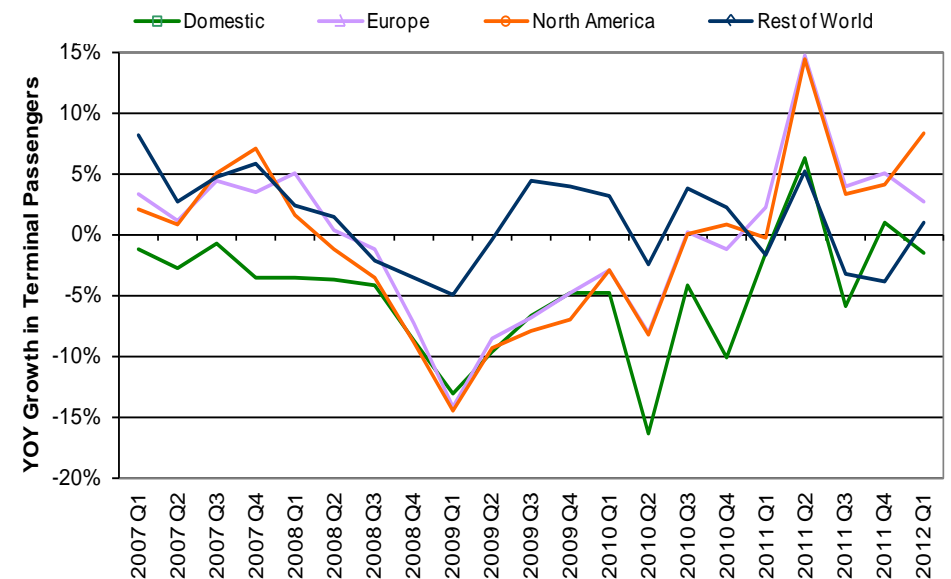
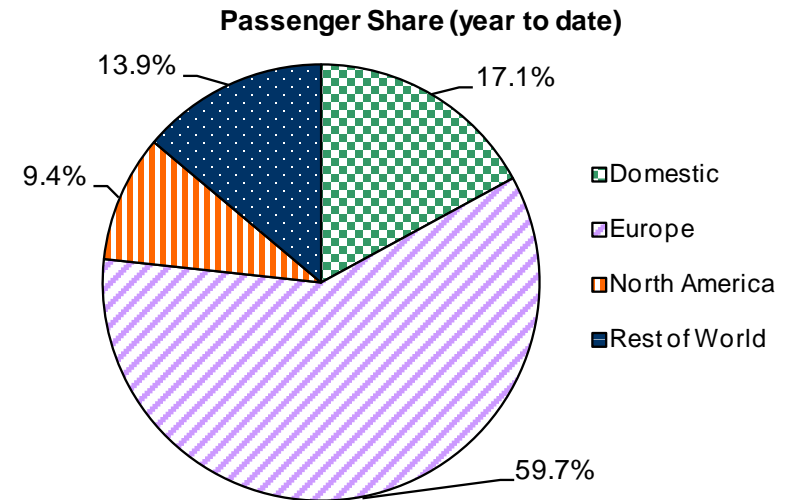


#### 4. Terminal passengers at UK airports by origin / destination<sup>6,7,8,9,11</sup>

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2012		Q1 2011		+/- %	Q2 11 - Q1 12		Q2 10 - Q1 11		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
<b>Domestic</b>	<b>8.5</b>	<b>19%</b>	<b>8.6</b>	<b>20%</b>	<b>-1.6%</b>	<b>37.4</b>	<b>17%</b>	<b>37.5</b>	<b>18%</b>	<b>-0.3%</b>
- Scheduled	8.4	19%	8.5	20%	-1.6%	37.0	17%	37.2	18%	-0.4%
- Charter	0.1	0.2%	0.1	0.2%	5.9%	0.4	0.2%	0.3	0.2%	3.5%
<b>Europe</b>	<b>24.4</b>	<b>55%</b>	<b>23.8</b>	<b>55%</b>	<b>2.7%</b>	<b>130.7</b>	<b>60%</b>	<b>122.5</b>	<b>58%</b>	<b>6.7%</b>
- Scheduled	22.4	50%	21.7	50%	3.2%	113.4	52%	105.1	50%	8.0%
- Charter	2.0	5%	2.1	5%	-2.0%	17.3	8%	17.5	8%	-1.2%
<b>North America</b>	<b>4.0</b>	<b>9%</b>	<b>3.7</b>	<b>9%</b>	<b>8.2%</b>	<b>20.6</b>	<b>9%</b>	<b>19.2</b>	<b>9%</b>	<b>7.3%</b>
- Scheduled	4.0	9%	3.7	8%	8.4%	20.2	9%	18.8	9%	7.2%
- Charter	0.0	0.0%	0.0	0.0%	-27.9%	0.4	0.2%	0.4	0.2%	13.2%
<b>Rest of World</b>	<b>7.5</b>	<b>17%</b>	<b>7.4</b>	<b>17%</b>	<b>1.0%</b>	<b>30.4</b>	<b>14%</b>	<b>30.5</b>	<b>15%</b>	<b>-0.5%</b>
- Scheduled	6.7	15%	6.6	15%	1.5%	27.2	12%	26.9	13%	0.9%
- Charter	0.8	2%	0.8	2%	-3.1%	3.2	1%	3.6	2%	-10.8%
<b>Total</b>	<b>44.4</b>	<b>100%</b>	<b>43.5</b>	<b>100%</b>	<b>2.1%</b>	<b>219.1</b>	<b>100%</b>	<b>209.8</b>	<b>100%</b>	<b>4.4%</b>
- Scheduled	41.5	94%	40.6	93%	2.4%	197.8	90%	188.0	90%	5.2%
- Charter	2.9	6%	2.9	7%	-2.2%	21.3	10%	21.8	10%	-2.5%

Source: CAA Airport Statistics

There were 2.7% and 8.2% more passengers travelling to and from Europe and North America respectively in quarter 1 2012. The number of passengers on board domestic flights was down 1.6% compared with the same quarter last year. Travel to and from 'Rest of the World' showed a 1.0% increase. On a rolling year basis, the total number of passengers was up 4.4%.



## 5. Air cargo tonnes carried to and from UK airports<sup>5,7,10</sup>

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2012		Q1 2011		+/- %	Q2 11 - Q1 12		Q2 10 - Q1 11		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
<b>Cargo on cargo only flights</b>	<b>203.4</b>	<b>33%</b>	<b>204.9</b>	<b>33%</b>	<b>-0.8%</b>	<b>824.4</b>	<b>33%</b>	<b>840.9</b>	<b>33%</b>	<b>-2.0%</b>
London	80.6	13%	81.9	13%	-1.6%	329.1	13%	332.5	13%	-1.0%
Regional	122.7	20%	123.0	20%	-0.2%	495.3	20%	508.4	20%	-2.6%
<b>Bellyhold cargo</b>	<b>412.5</b>	<b>67%</b>	<b>413.3</b>	<b>67%</b>	<b>-0.2%</b>	<b>1,687.9</b>	<b>67%</b>	<b>1,697.7</b>	<b>67%</b>	<b>-0.6%</b>
London	387.8	63%	390.2	63%	-0.6%	1,586.6	63%	1,597.5	63%	-0.7%
Regional	24.7	4%	23.1	4%	7.0%	101.2	4%	100.2	4%	1.0%
<b>Total cargo</b>	<b>615.8</b>	<b>100%</b>	<b>618.2</b>	<b>100%</b>	<b>-0.4%</b>	<b>2,512.3</b>	<b>100%</b>	<b>2,538.7</b>	<b>100%</b>	<b>-1.0%</b>
London	468.4	76%	472.1	76%	-0.8%	1,915.8	76%	1,930.1	76%	-0.7%
Regional	147.4	24%	146.1	24%	0.9%	596.5	24%	608.6	24%	-2.0%

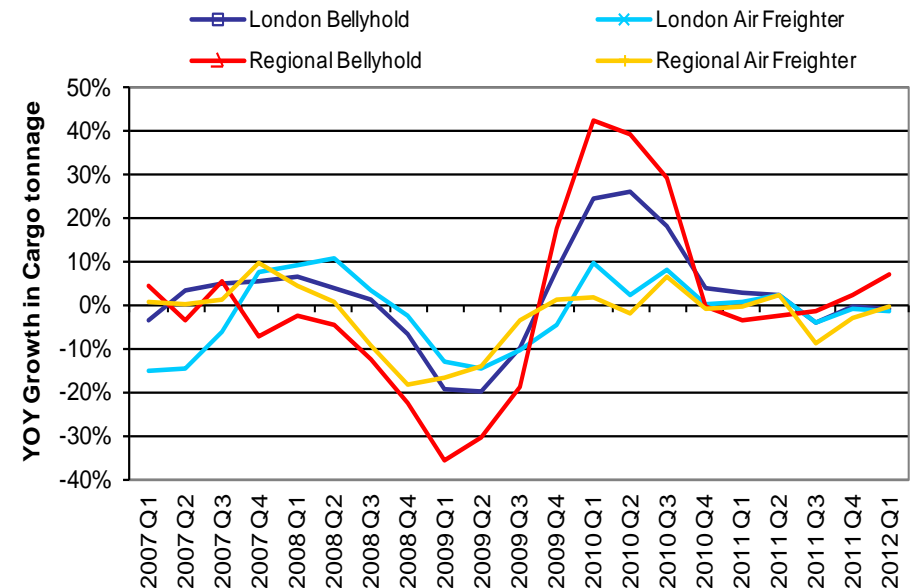
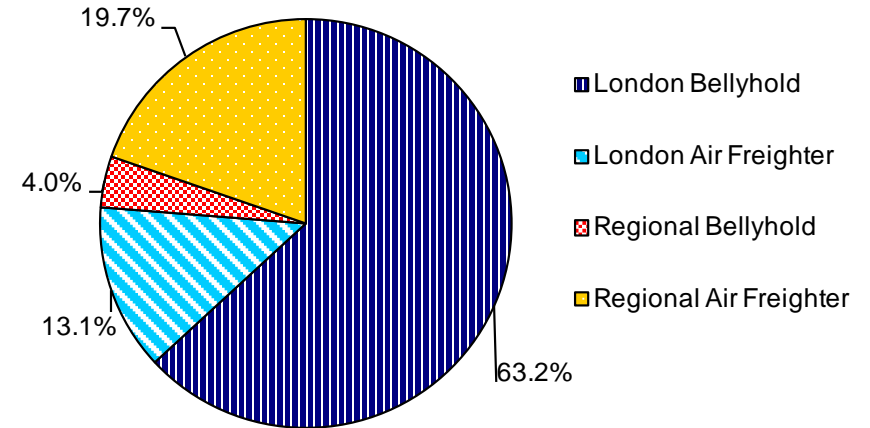
Source: CAA Airport Statistics

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

In quarter 1 2012, total cargo tonnage at all UK airports was down 0.4% compared with quarter 1 2011. On a rolling year basis, it was down 1.0%. Cargo tonnage at London airports saw a 0.8% decrease while there was a 0.9% increase at regional airports.

Air freighter and bellyhold cargo tonnage decreased by 0.8% and 0.2% respectively compared with the same quarter last year. On a rolling year basis, they dropped by 2.0% and 0.6% respectively.

Cargo Share (year to date)



## 6. All commercial flights to and from UK airports<sup>5,7,10,11</sup>

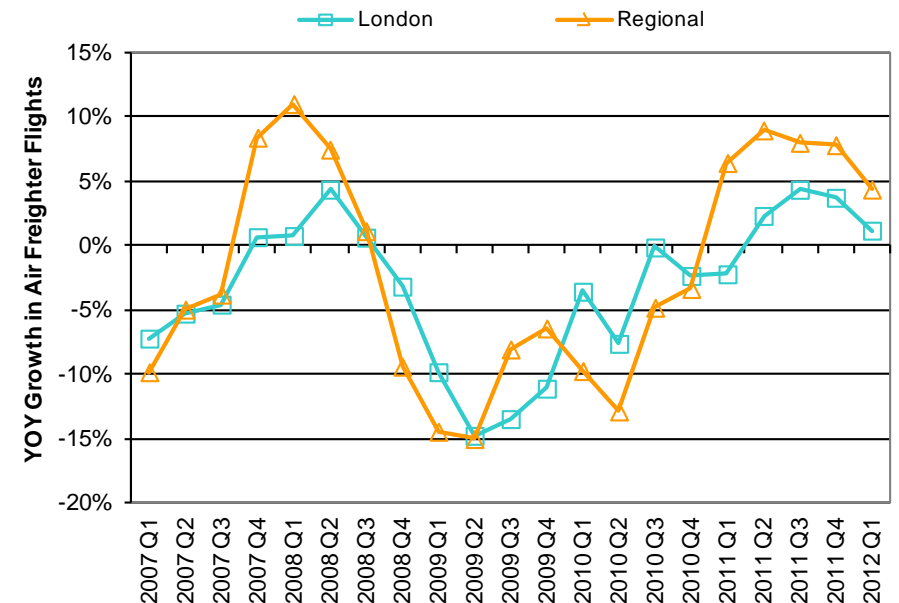
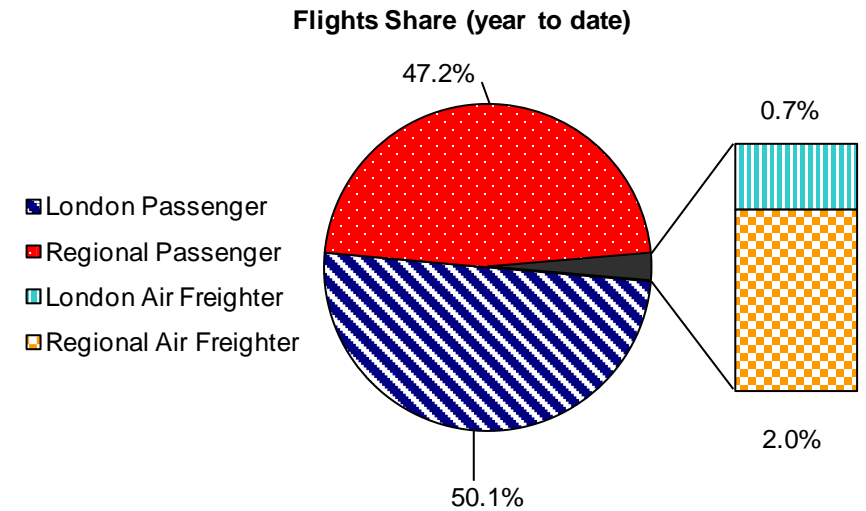
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2012		Q1 2011		+/- %	Q2 11 - Q1 12		Q2 10 - Q1 11		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
<b>Air freighter</b>	13.1	3%	12.6	3%	3.5%	53.1	3%	50.0	3%	6.1%
London	3.5	1%	3.4	1%	1.2%	14.2	1%	13.8	1%	2.9%
Regional	9.6	2%	9.2	2%	4.4%	38.9	2%	36.2	2%	7.3%
<b>Passenger flights</b>	420.1	97%	428.3	97%	-1.9%	1,893.1	97%	1,864.3	97%	1.5%
London	224.2	52%	227.5	52%	-1.4%	974.7	50%	947.1	49%	2.9%
Regional	195.9	45%	200.9	46%	-2.5%	918.4	47%	917.2	48%	0.1%
<b>Total flights</b>	433.2	100%	440.9	100%	-1.8%	1,946.2	100%	1,914.3	100%	1.7%
London	227.7	53%	230.9	52%	-1.4%	988.9	51%	960.9	50%	2.9%
Regional	205.5	47%	210.0	48%	-2.2%	957.3	49%	953.4	50%	0.4%

Source: CAA Airport Statistics

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 2012, the total number of commercial flights in the UK was down 1.8% compared to the same quarter in 2011. London airports saw a smaller decrease (1.4%) than regional airports (2.2%). On a rolling year basis, the total number of flights was up 1.7%.

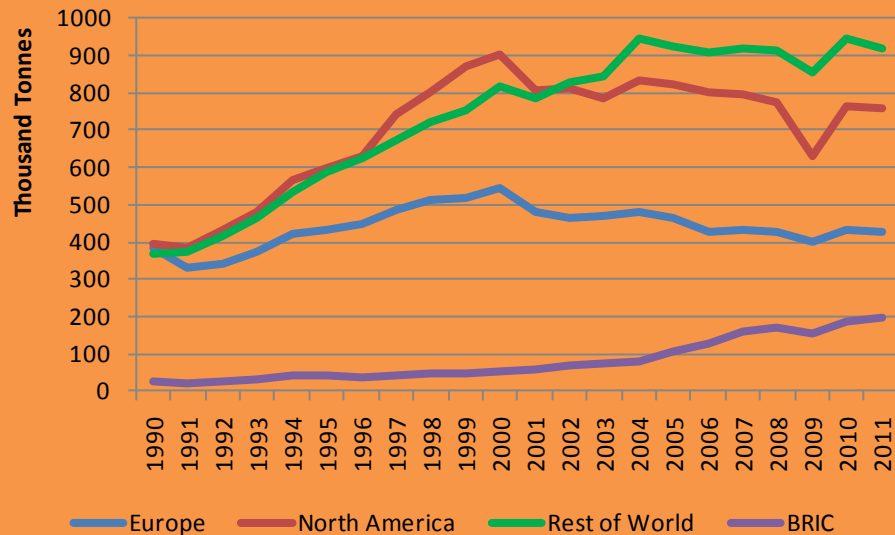
The number of air freighter flights in quarter 1 2012 was up 3.5% on quarter 1 2011, and that of passenger flights dropped by 1.9%.





## Did you know? International Cargo Tonnage by World Region

International cargo tonnage by world region, since 1990



Source: CAA Airport Statistics

Note: Region represents the origin/destination of the flight that transported the cargo to and from the UK and not where ultimately the cargo originated/was destined, as it could have been transhipped.

BRIC is defined as Brazil, Russia, India and Mainland China (Hong Kong is included in the 'Rest of World' category).

In 2011, cargo tonnage on international flights to and from the UK was similar to the level reached in 2000; it has remained broadly at this level or below throughout this period. This is in contrast with the 1990s, a time when international cargo tonnage was growing at more than 7% per annum.

The flattening out of cargo volumes coincided with the growth of low-cost carriers in Europe (whose business models typically do not allow for cargo carriage) as well as the stabilisation of flight numbers between the UK and North America.

However, over the past decade, cargo tonnage carried between the UK and world destinations other than Europe and North America still grew at an average 2.8% per annum, helped by the more marked growth to BRIC countries. Within the BRIC countries, growth was particularly strong to and from India and, to some extent, mainland China. This was because there were increases in both cargo tonnage per flight and the number of flights between BRIC countries and the UK.

## 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](http://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. Graphs 2, 3 and 5: London airports are Heathrow, Gatwick, Stansted, Luton and London City. 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.
6. Graphs 1, 2 and 4: Terminal passengers are those commencing their journey or connecting between flights at the airport, but exclude transit passengers who do not disembark.
7. Graphs 2, 3, 4, 5 and 6 exclude traffic to and from North Sea oilrigs.
8. Graph 4: 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.
9. Graph 4: 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.
10. Graph 5: Cargo comprises mail and freight.
11. All data excludes the activity of Air Taxis – those aircraft with maximum take-off weights of less than 15 tonnes flying non-scheduled services.