

Aviation Trends

Quarter 2 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 the trends of air passenger traffic provided by Gulf carriers at UK regional airports.

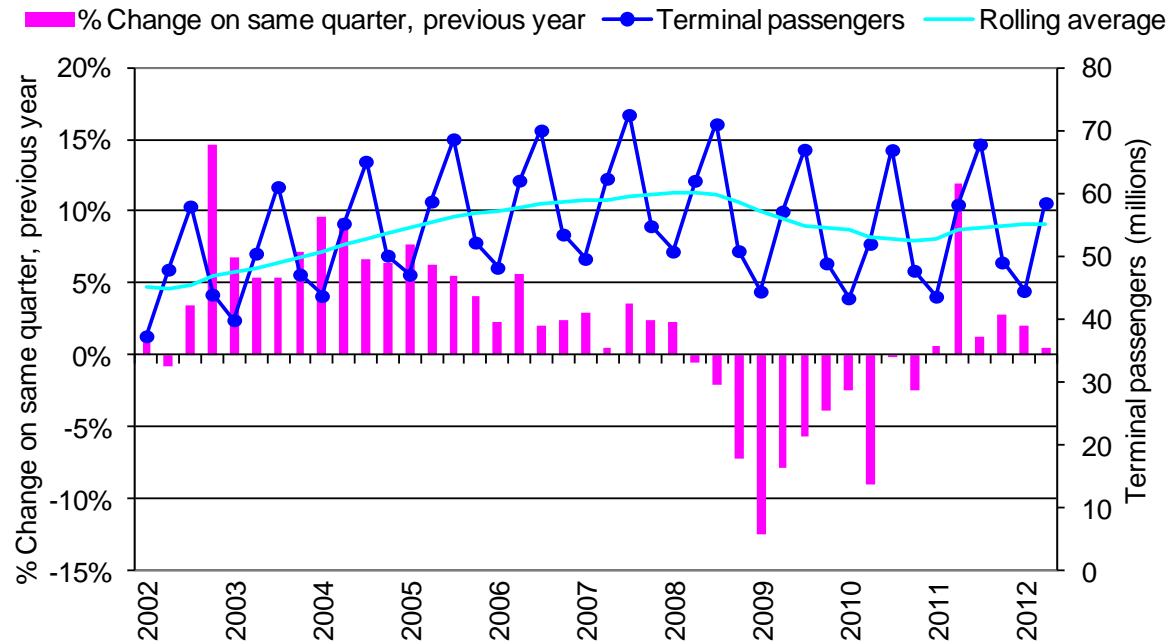
In this edition of aviation trends, we show a modest increase in the number of passengers and cargo tonnage handled at all UK airports, and a small decline in all commercial flights during quarter 2 2012.

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, 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.

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^{6,11}



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 2 2012, UK airports handled 58.6 million terminal passengers, a slight improvement of 0.4% compared with quarter 2 2011.

2. Terminal passengers at UK airports^{5,6,7,11}

Passengers (Millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2012		Q2 2011		+/- %	Q3 11 - Q2 12		Q3 10 - Q2 11		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
London Airports	35.2	60%	35.0	60%	0.8%	134.6	61%	131.8	61%	2.1%
- Scheduled	33.7	58%	33.2	57%	1.5%	128.2	58%	125.0	58%	2.6%
- Charter	1.6	3%	1.8	3%	-13.3%	6.3	3%	6.8	3%	-7.4%
Regional Airports	23.1	40%	23.1	40%	-0.1%	84.8	39%	84.2	39%	0.7%
- Scheduled	19.3	33%	18.9	33%	2.1%	70.5	32%	69.2	32%	1.9%
- Charter	3.8	7%	4.2	7%	-9.8%	14.3	7%	15.0	7%	-5.0%
All Airports	58.4	100%	58.1	100%	0.4%	219.4	100%	216.0	100%	1.5%
- Scheduled	53.0	91%	52.1	90%	1.7%	198.8	91%	194.2	90%	2.4%
- Charter	5.4	9%	6.0	10%	-10.8%	20.6	9%	21.9	10%	-5.7%

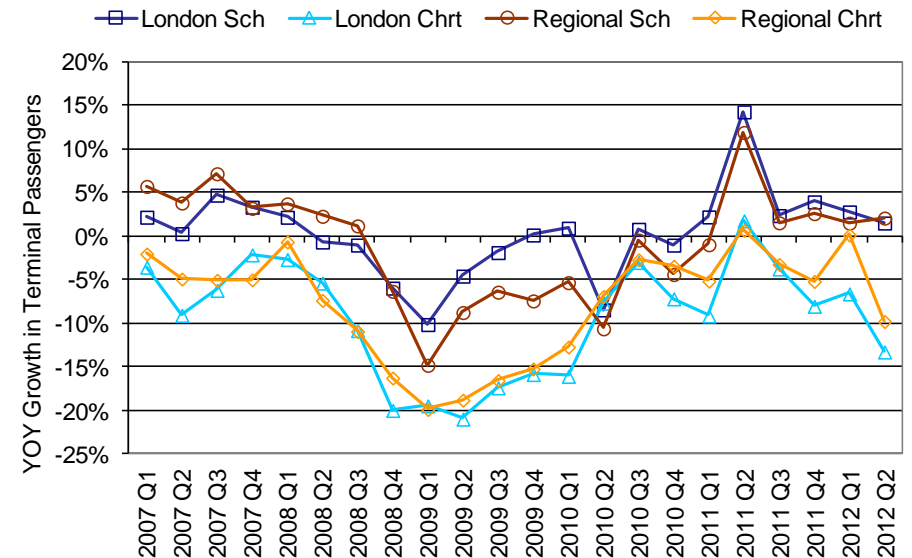
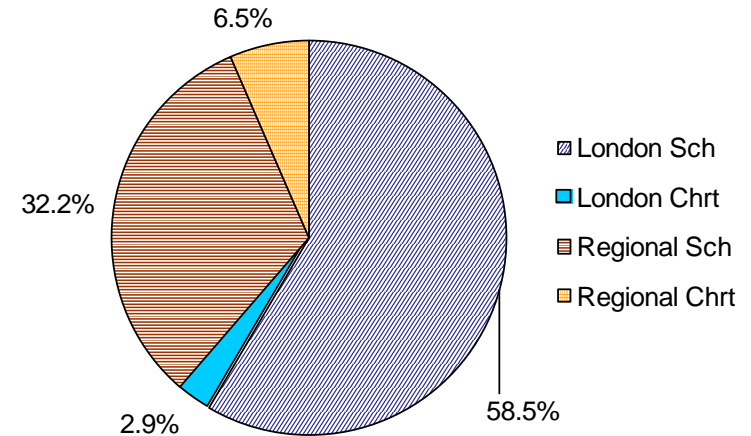
Source: CAA Airport Statistics³

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 2 2012, compared to the same quarter last year, the London airports handled 0.8% more passengers, and regional airports saw a drop of 0.1%. On a rolling year basis, passenger numbers were 2.1% and 0.7% higher than the year before at London airports and regional airports respectively.

Across all UK airports, the number of passengers on scheduled flights was up 1.7% and down 10.8% on charter flights compared with quarter 2 2011.

Passenger Share (year to date)



3. Passenger flights to and from UK airports^{5,7,11}

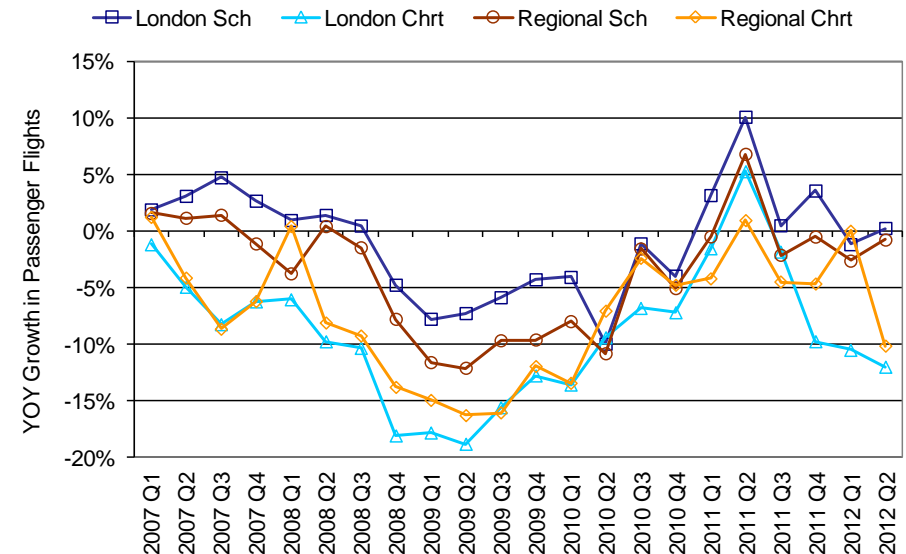
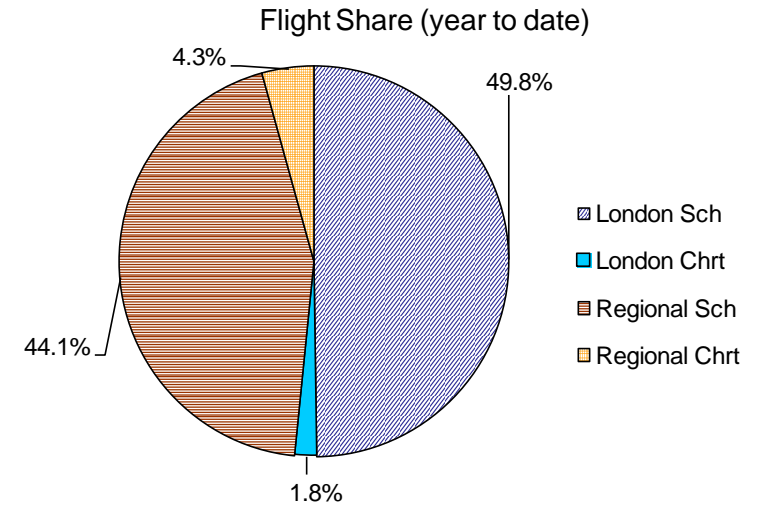
Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2012		Q2 2011		+/- %	Q3 11 - Q2 12		Q3 10 - Q2 11		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
London Airports	252.1	51%	252.7	50%	-0.2%	974.1	52%	969.8	51%	0.4%
- Scheduled	243.4	49%	242.7	48%	0.3%	939.9	50%	932.9	49%	0.8%
- Charter	8.8	2%	10.0	2%	-12.0%	34.2	2%	36.9	2%	-7.4%
Regional Airports	243.7	49%	247.8	50%	-1.7%	914.3	48%	931.7	49%	-1.9%
- Scheduled	222.1	45%	223.8	45%	-0.8%	833.2	44%	845.9	44%	-1.5%
- Charter	21.6	4%	24.1	5%	-10.1%	81.1	4%	85.8	5%	-5.5%
All Airports	495.8	100%	500.5	100%	-0.9%	1,888.4	100%	1,901.5	100%	-0.7%
- Scheduled	465.4	94%	466.5	93%	-0.2%	1,773.1	94%	1,778.8	94%	-0.3%
- Charter	30.4	6%	34.0	7%	-10.7%	115.3	6%	122.7	6%	-6.1%

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 2 2011, the number of passenger flights at all UK airports decreased by 0.9% in quarter 2 2012. There were 0.2% fewer scheduled flights and 10.7% fewer charter flights. On a rolling year basis, the number of scheduled and charter flights were down 0.3% and 6.1% respectively.

There were 0.2% fewer flights at London airports and 1.7% fewer flights at regional airports in quarter 2 2012 than in the same period in 2011. On a rolling year basis, the number of flights grew by 0.4% at London airports, and decreased by 1.9% at regional airports.

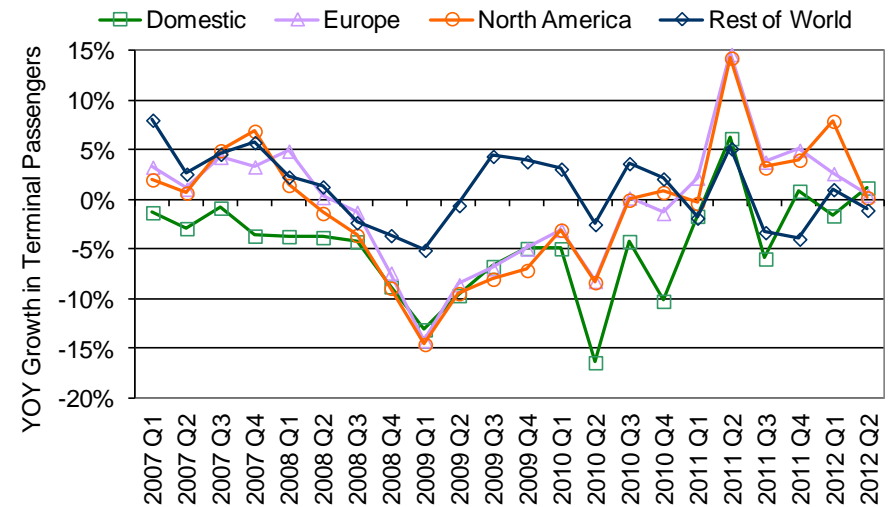
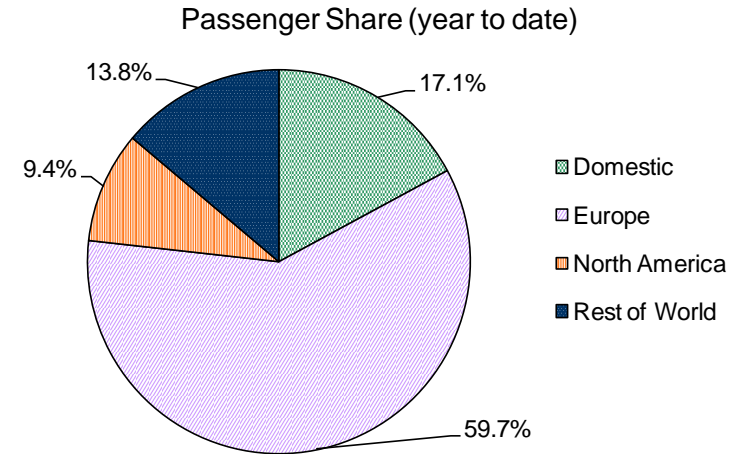


4. Terminal passengers at UK airports by origin / destination^{6,7,8,9,11}

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2012		Q2 2011		+/- %	Q3 11 - Q2 12		Q3 10 - Q2 11		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
Domestic	9.7	17%	9.5	16%	1.3%	37.5	17%	38.1	18%	-1.5%
- Scheduled	9.6	16%	9.4	16%	1.2%	37.1	17%	37.7	17%	-1.5%
- Charter	0.1	0.2%	0.1	0.2%	6.9%	0.4	0.2%	0.4	0.2%	3.1%
Europe	35.8	61%	35.6	61%	0.5%	130.9	60%	127.1	59%	3.0%
- Scheduled	31.4	54%	30.6	53%	2.7%	114.3	52%	109.5	51%	4.4%
- Charter	4.4	8%	5.0	9%	-12.8%	16.6	8%	17.6	8%	-5.7%
North America	5.7	10%	5.7	10%	0.3%	20.6	9%	19.9	9%	3.5%
- Scheduled	5.5	9%	5.5	10%	0.2%	20.2	9%	19.5	9%	3.4%
- Charter	0.1	0.2%	0.1	0.2%	4.2%	0.4	0.2%	0.4	0.2%	8.3%
Rest of World	7.2	12%	7.3	13%	-1.0%	30.3	14%	30.9	14%	-1.8%
- Scheduled	6.5	11%	6.5	11%	-0.8%	27.1	12%	27.4	13%	-1.0%
- Charter	0.8	1%	0.8	1%	-2.8%	3.2	1%	3.5	2%	-8.4%
Total	58.4	100%	58.1	100%	0.4%	219.4	100%	216.0	100%	1.5%
- Scheduled	53.0	91%	52.1	90%	1.7%	198.8	91%	194.2	90%	2.4%
- Charter	5.4	9%	6.0	10%	-10.8%	20.6	9%	21.9	10%	-5.7%

Source: CAA Airport Statistics

Compared to the same quarter last year, in quarter 2 2012, there were 1.3%, 0.5% and 0.3% more passengers travelling to and from domestic destinations, Europe and North America respectively. The number of passengers on board flights to and from 'Rest of the World' was down 1.0%. On a rolling year basis, the total number of passengers was up 1.5%.



5. Air cargo tonnes carried to and from UK airports^{5,7,10}

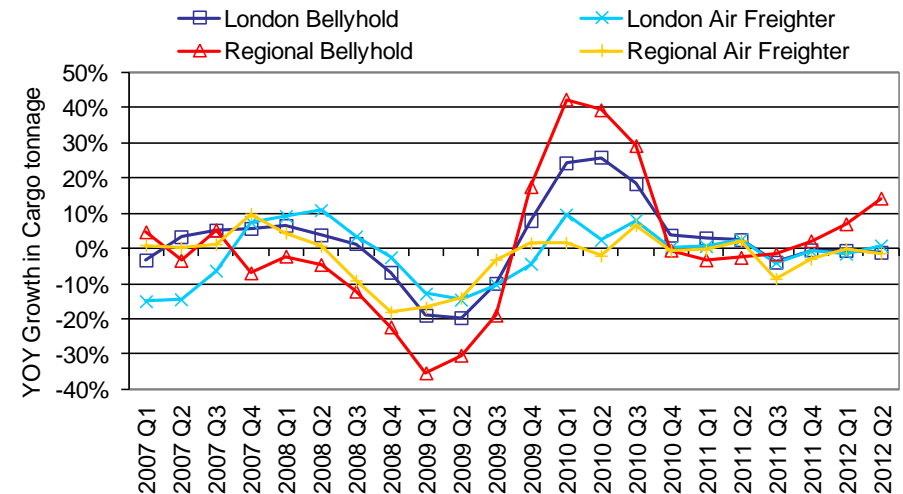
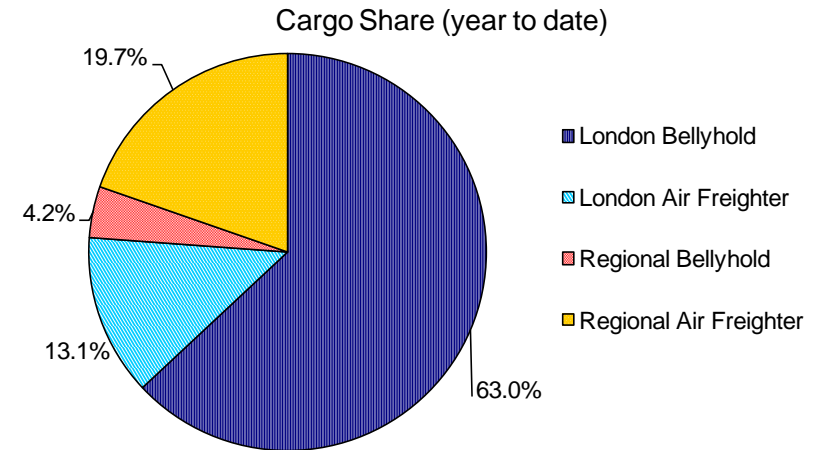
Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2012		Q2 2011		+/- %	Q3 11 - Q2 12		Q3 10 - Q2 11		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
Cargo on cargo only flights	202.4	32%	203.4	32%	-0.5%	823.4	33%	845.6	33%	-2.6%
- London	82.6	13%	81.9	13%	0.8%	329.8	13%	334.5	13%	-1.4%
- Regional	119.8	19%	121.5	19%	-1.4%	493.6	20%	511.0	20%	-3.4%
Bellyhold cargo	424.8	68%	425.9	68%	-0.3%	1,686.7	67%	1,706.7	67%	-1.2%
- London	396.7	63%	401.3	64%	-1.2%	1,582.0	63%	1,607.1	63%	-1.6%
- Regional	28.1	4%	24.6	4%	14.3%	104.7	4%	99.5	4%	5.2%
Total cargo	627.2	100%	629.3	100%	-0.3%	2,510.1	100%	2,552.2	100%	-1.7%
- London	479.2	76%	483.2	77%	-0.8%	1,911.8	76%	1,941.7	76%	-1.5%
- Regional	147.9	24%	146.1	23%	1.3%	598.3	24%	610.6	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 2 2012, total cargo tonnage at all UK airports was down 0.3% compared with the same period in 2011. On a rolling year basis, it was down 1.7%. Cargo tonnage at London airports saw a 0.8% decrease while there was a 1.3% increase at regional airports.

Air freighter cargo and bellyhold cargo tonnage dropped by 0.5% and 0.3% respectively compared with the same quarter last year. On a rolling year basis, both have decreased, by 2.6% and 1.2% respectively.



6. All commercial flights to and from UK airports^{5,7,10,11}

Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2012		Q2 2011		+/- %	Q3 11 - Q2 12		Q3 10 - Q2 11		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
Air freighter	13.2	3%	12.4	2%	6.5%	53.9	3%	50.9	3%	6.0%
- London	3.5	1%	3.5	1%	1.0%	14.3	1%	13.9	1%	2.6%
- Regional	9.8	2%	9.0	2%	8.6%	39.6	2%	37.0	2%	7.2%
Passenger flights	495.8	97%	500.5	98%	-0.9%	1,888.4	97%	1,901.5	97%	-0.7%
- London	252.1	50%	252.7	49%	-0.2%	974.1	50%	969.8	50%	0.4%
- Regional	243.7	48%	247.8	48%	-1.7%	914.3	47%	931.7	48%	-1.9%
Total flights	509.1	100%	513.0	100%	-0.8%	1,942.3	100%	1,952.4	100%	-0.5%
- London	255.6	50%	256.2	50%	-0.2%	988.4	51%	983.7	50%	0.5%
- Regional	253.4	50%	256.8	50%	-1.3%	953.9	49%	968.6	50%	-1.5%

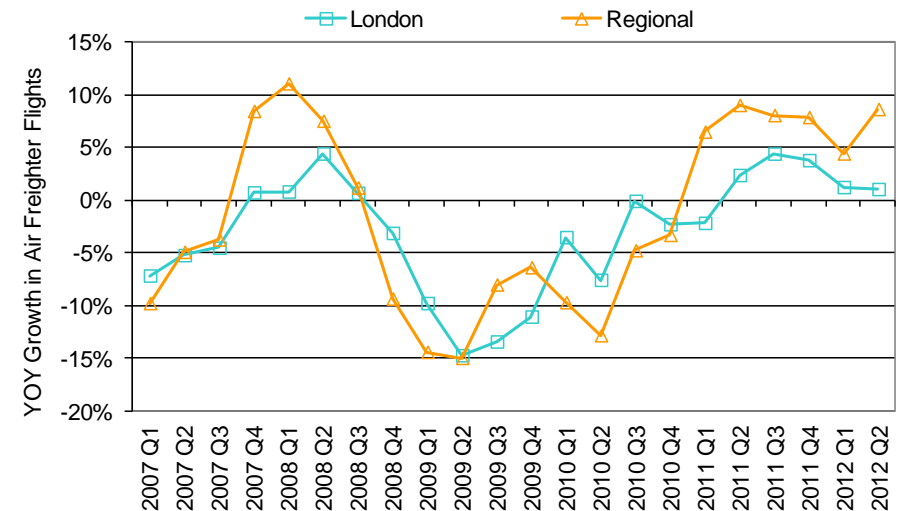
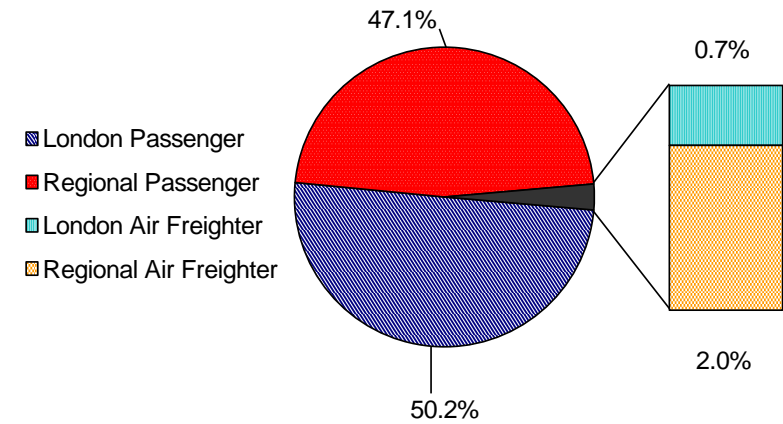
Source: CAA Airport Statistics

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 2 2012, the total number of commercial flights in the UK was down 0.8% compared to the same quarter in 2011. The number of air freighter flights was up 6.5%, and that of passenger flights dropped by 0.9%.

London airports saw an increase of 0.2% whereas regional airports experienced a drop of 1.3%. On a rolling year basis, the total number of flights was down 0.5%.

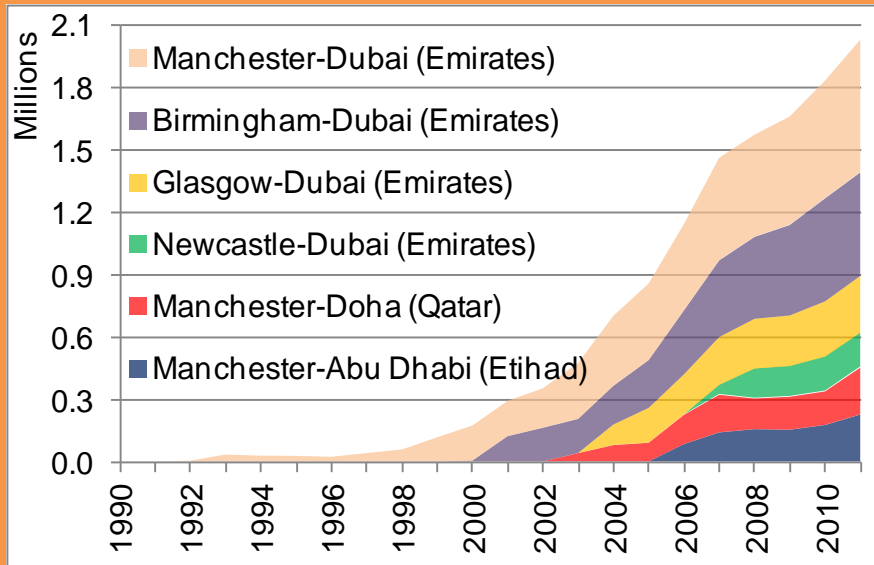
Flights Share (year to date)



Did you know? Gulf carriers at UK regional airports

The Gulf airlines, most notably Emirates, Qatar Airways and Etihad Airways, provide Europe-Asia, Europe-Australia and Europe-Africa transfer services via their hubs in the Middle East.

Direct passengers carried by Emirates, Qatar Airways and Etihad Airways at UK regional airports, 1990-2011



Source: CAA Airport Statistics

All three carriers started out serving only London (Heathrow and Gatwick), before gradually extended their reach. Emirates offered direct Manchester-Dubai services, along with indirect routes via Frankfurt and Zurich in the 1990s, before adding Birmingham, Glasgow and Newcastle to its network between 2001 and 2007. In 2011, between UK regional airports and Dubai, Emirates offered a frequency of two departures from Manchester, two from Birmingham, and one each from Glasgow and Newcastle every day. Qatar Airways started daily Manchester-Doha flights in 2003, and Etihad has been operating daily departure flights between Manchester and Abu Dhabi since 2007. The frequency of both routes increased to around 10 weekly departures in 2011.

The number of passengers between UK regional airports and the Middle East hubs has been growing every year since 1997. The Gulf carriers' share of passengers at regional airports grew from 26% in 2001 to 40% in 2011. Connections to these non-UK hubs provide UK regional passengers travelling to the Eastern hemisphere with alternatives to European or domestic hub airports.

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. Graphs 2, 3 and 5: 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.
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.