

Aviation Trends

Quarter 4 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. We have expanded Part 1 'Historical overview of traffic' and added a new Part 7, 'Punctuality of passenger flights to and from UK 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; this time we introduce data on passenger complaints received by the CAA.

In this edition of Aviation Trends¹, we show a modest rise in the number of passengers and cargo tonnage, and a small decrease in the number of commercial flights handled at all UK airports, compared to the level in the same quarter last year.

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 adjustments². Due to rounding of figures, there may be an apparent slight discrepancy between the sum of the constituent items and the total as shown.

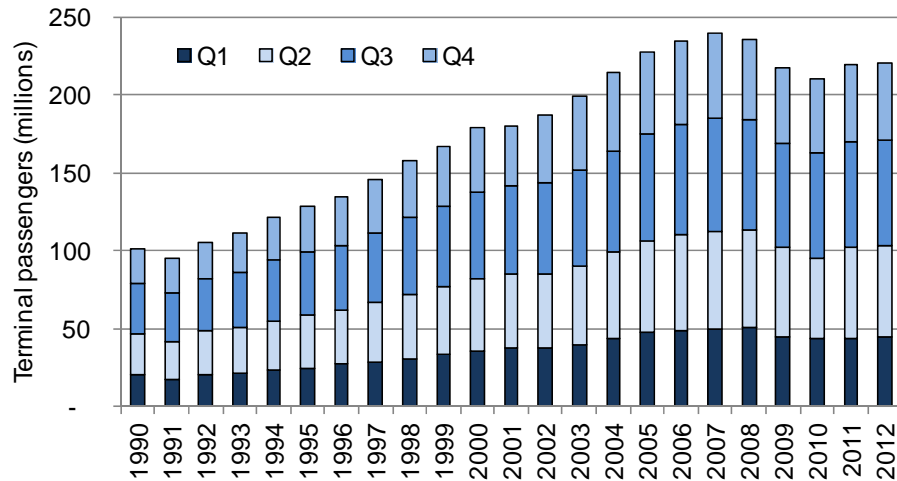
For a list of all statistics available on the CAA website, see www.caa.co.uk/statistics.

¹ Including traffic to and from North Sea oilrigs

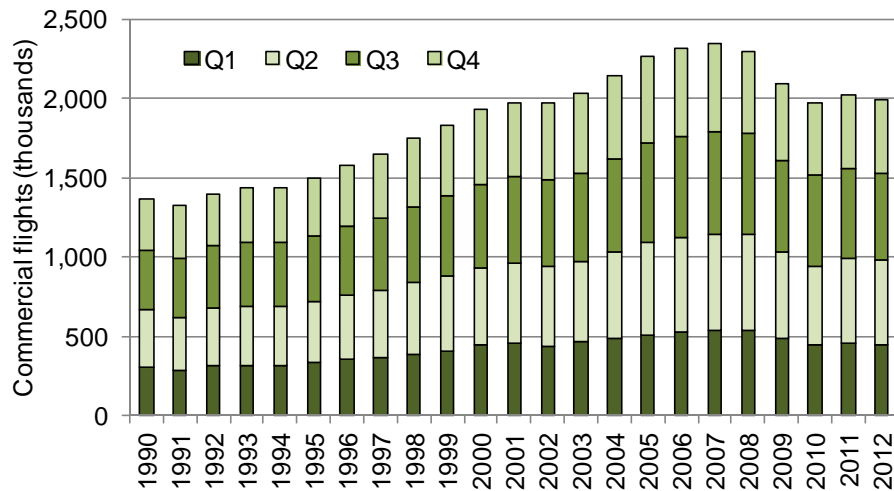
² Also, in editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. These islands are not formally part of the UK, and as we wish to present only the trends at UK airports, their figures are now excluded.

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

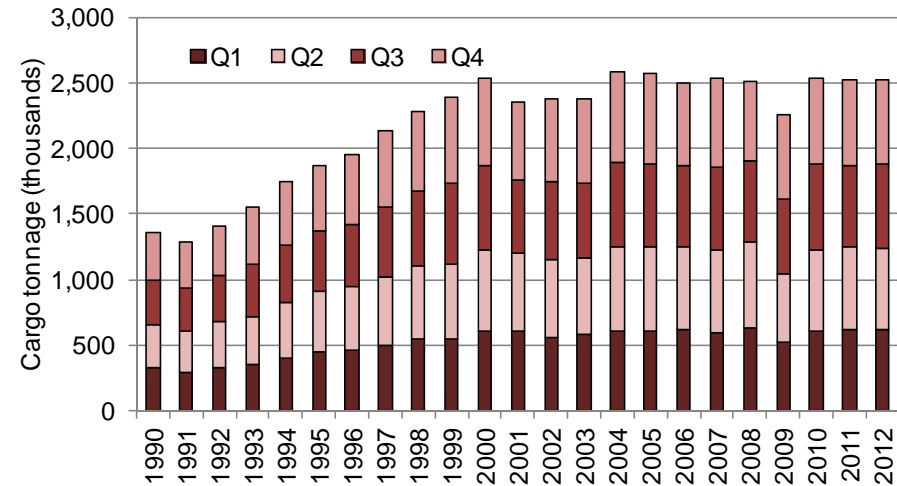
a. Terminal passengers



b. Commercial flights



c. Cargo tonnage



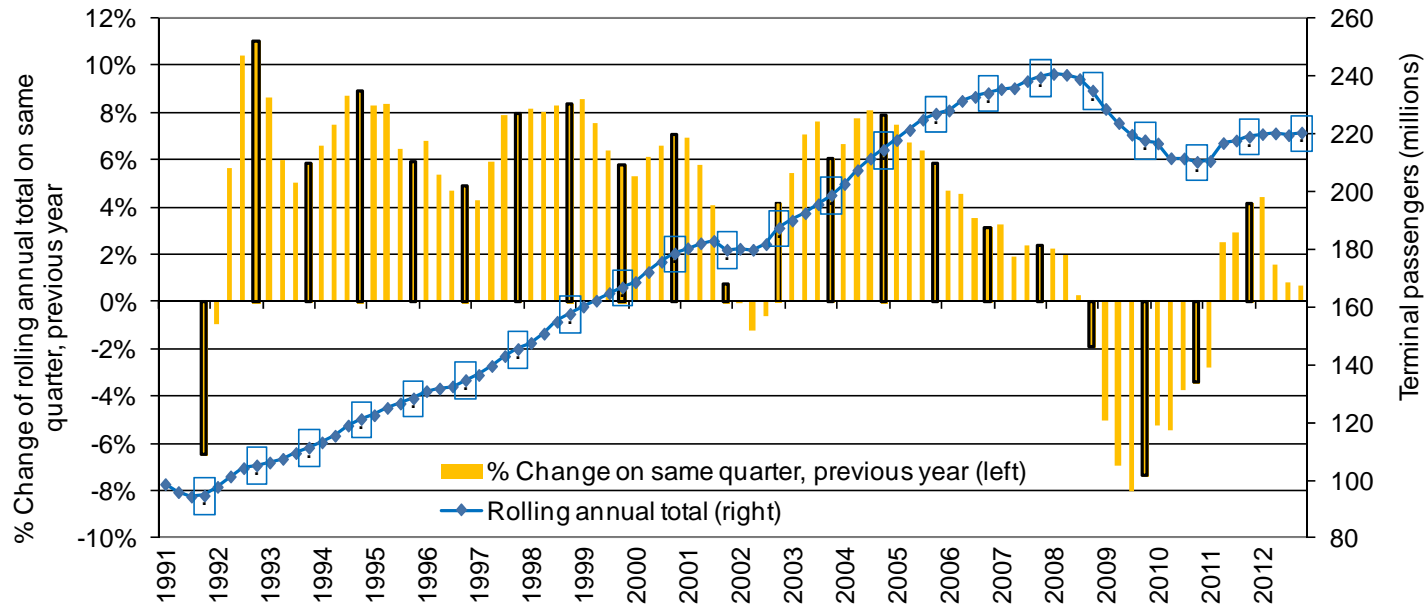
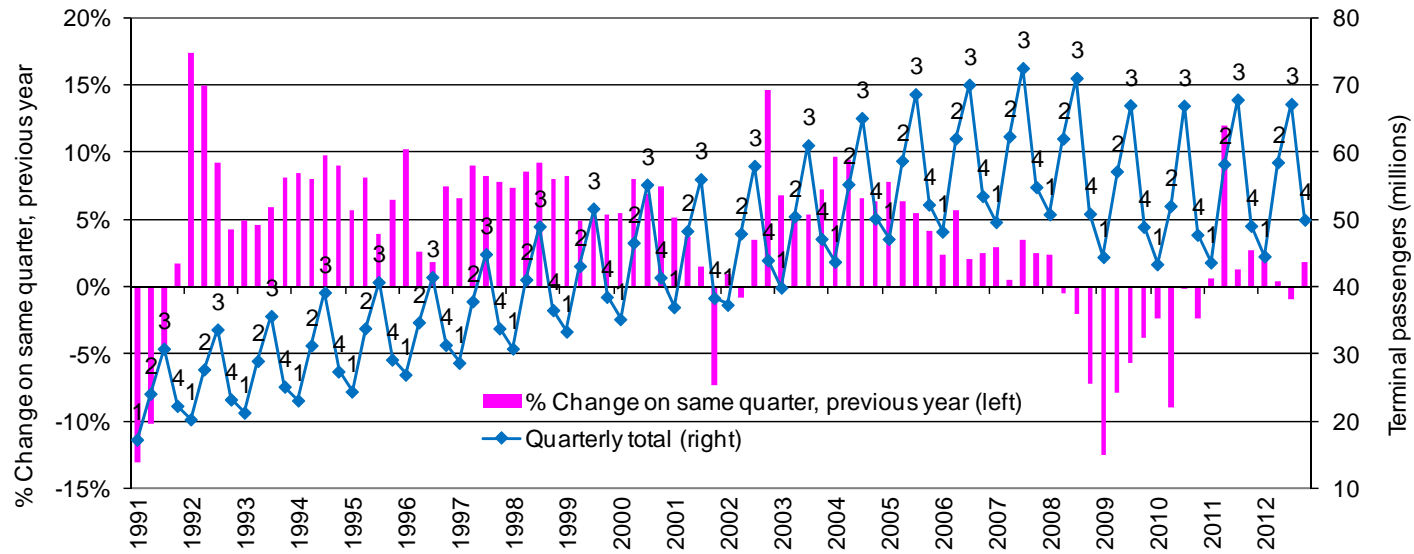
Plotting quarterly data of terminal passengers, commercial flights and cargo tonnage shows both seasonal and annual trends in UK aviation activity. These three time-series are shown on this page.

On pages 4 to 6, the first chart shows traffic in each quarter (on the right axis), and the percentage growth on the previous year's number in the same quarter (on the left axis).

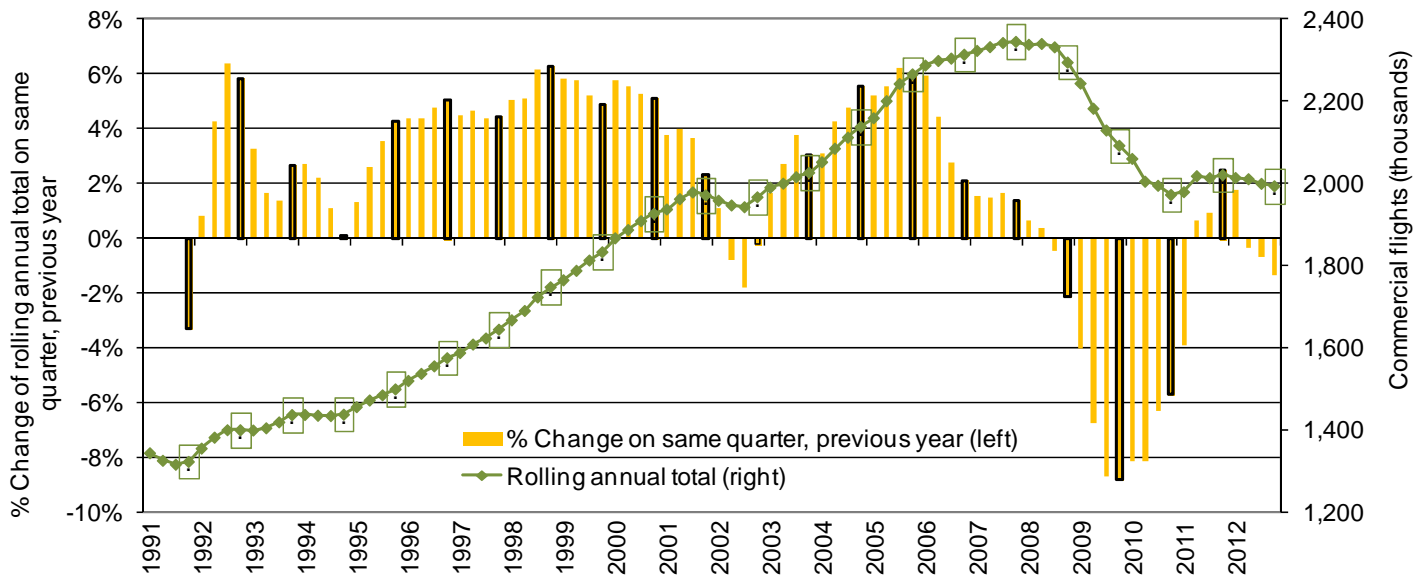
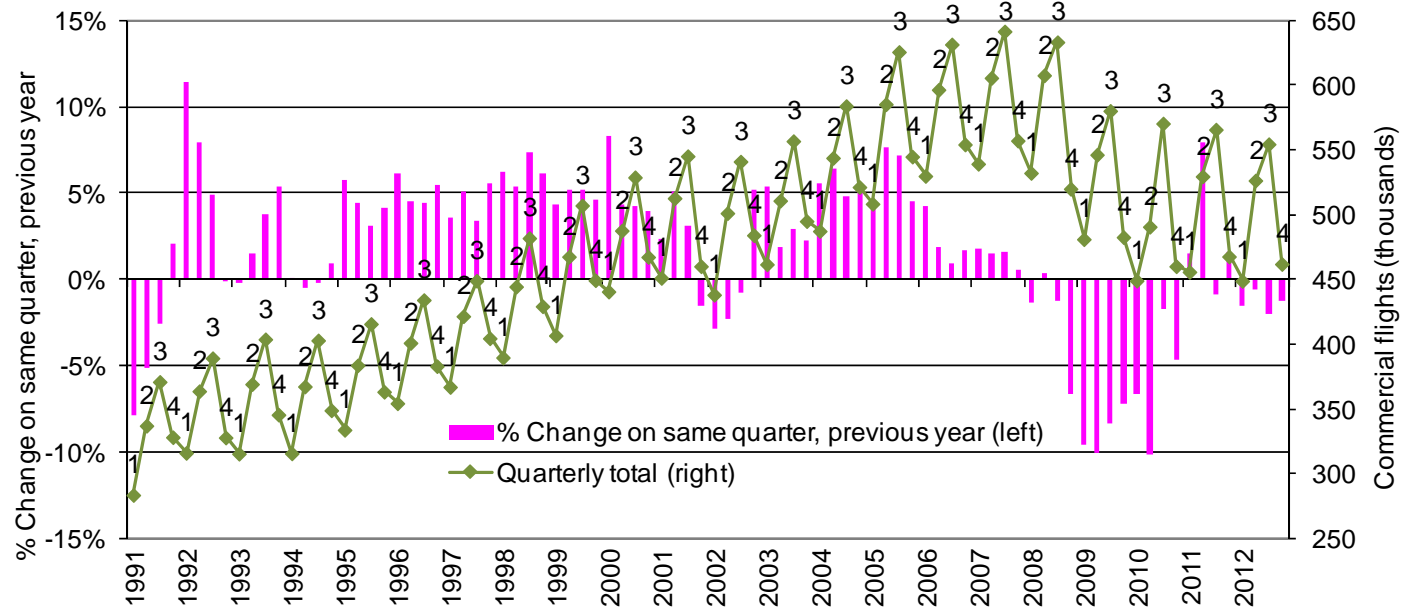
The second chart shows the rolling annual total in each quarter (on the right axis), and the percentage growth of the rolling annual total on the previous year's number in the same quarter (on the left axis). The highlighted data points are the annual traffic volumes and growth rates of the respective calendar years.

In quarter 4 2012, UK airports handled 50.0 million terminal passengers (an increase of 1.8%), 462,440 commercial flights (a fall of 1.2%), and 649,003 tonnes of cargo (an increase of 0.6%) compared to the same quarter last year.

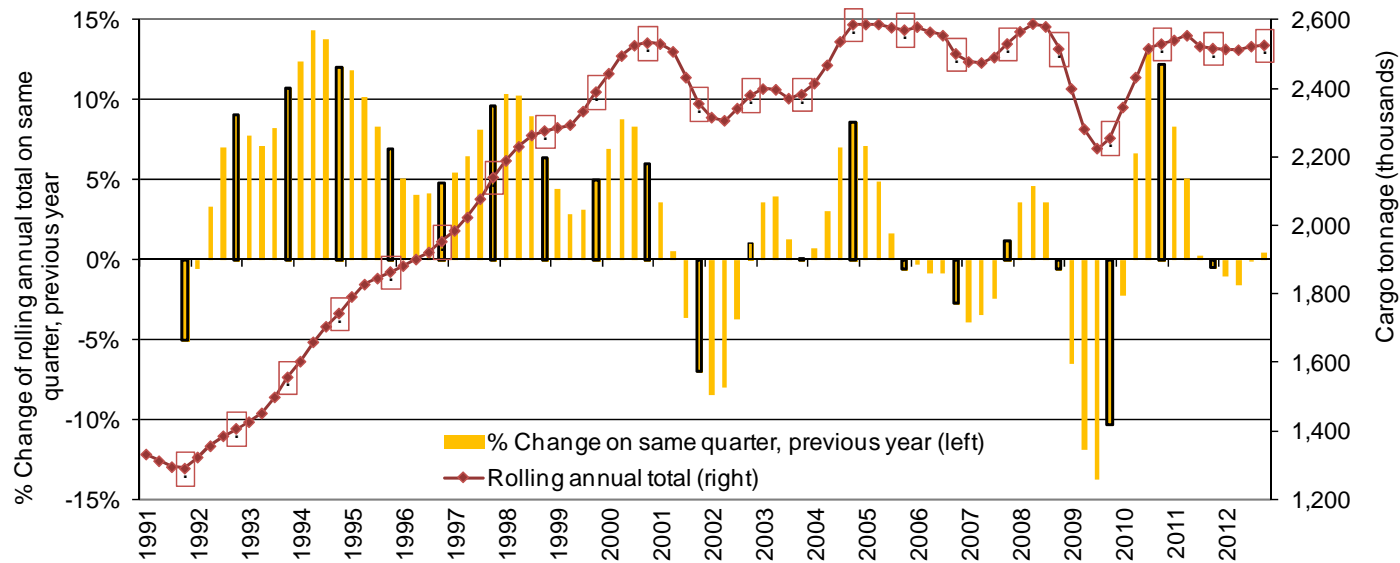
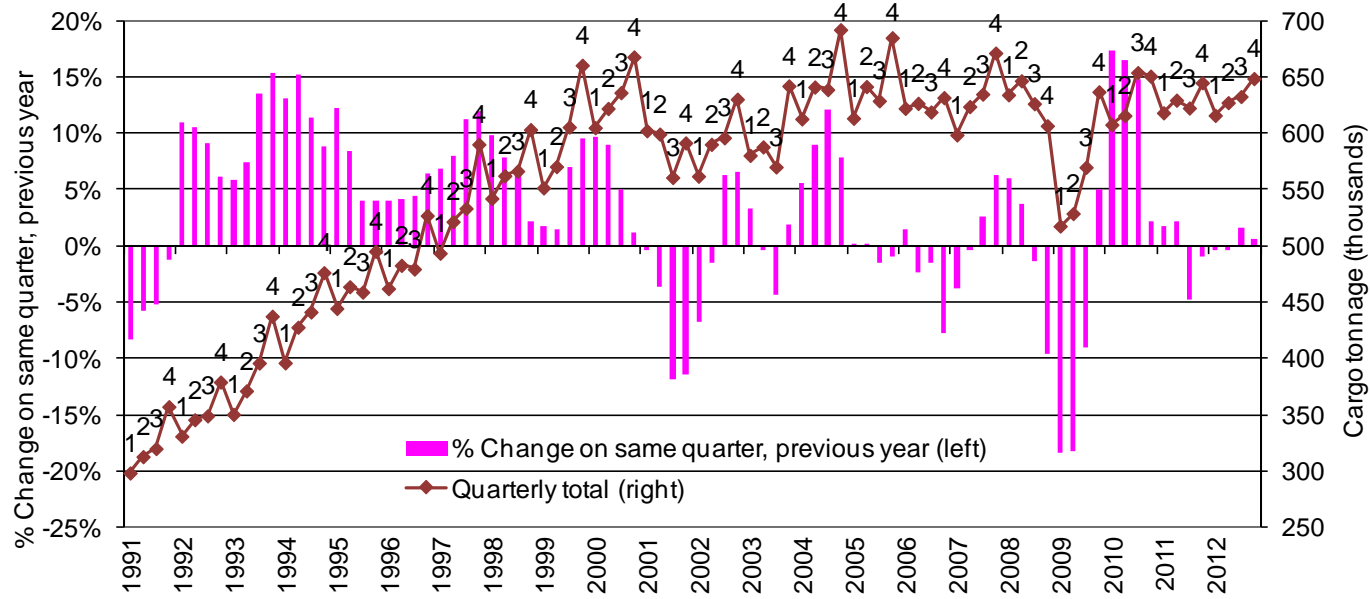
a. Terminal passengers



b. Commercial flights

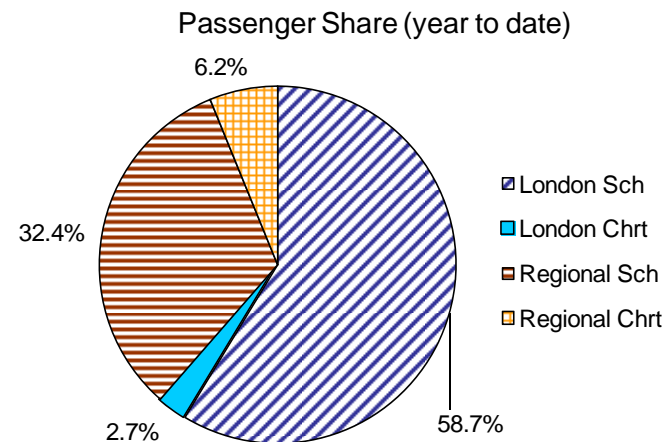


c. Cargo tonnage



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

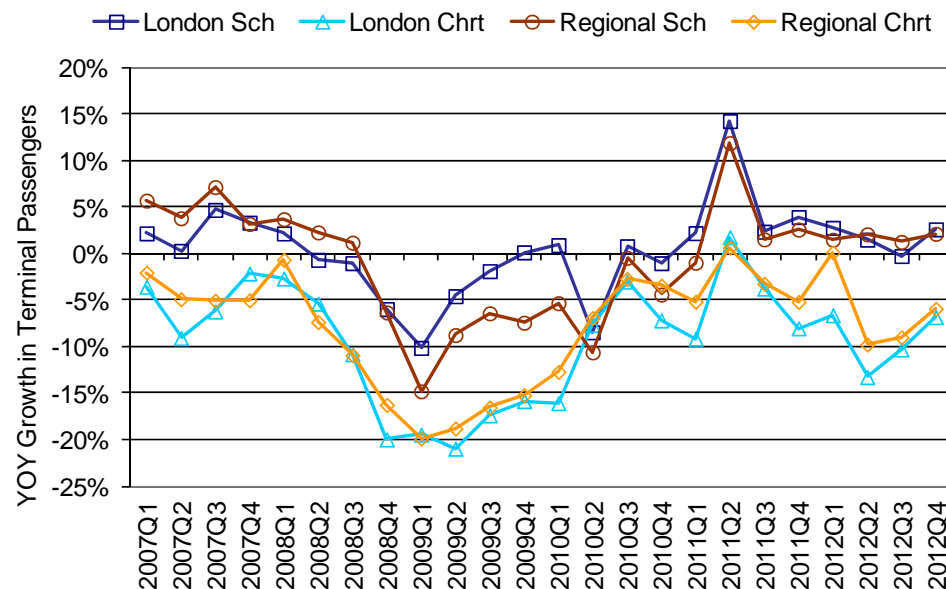
Passengers (Millions)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2012		Q4 2011		+/- %	Q1 12 – Q4 12		Q1 11 – Q4 11		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
London Airports	31.6	63%	30.9	63%	2.3%	134.9	61%	133.6	61%	1.0%
- Scheduled	30.6	61%	29.8	61%	2.6%	128.9	59%	127.0	58%	1.5%
- Charter	1.0	2%	1.1	2%	-6.8%	6.0	3%	6.7	3%	-10.0%
Regional Airports	18.3	37%	18.1	37%	1.1%	84.7	39%	84.6	39%	0.1%
- Scheduled	16.0	32%	15.6	32%	2.2%	71.1	32%	69.9	32%	1.7%
- Charter	2.3	5%	2.5	5%	-5.9%	13.6	6%	14.7	7%	-7.5%
All Airports	49.8	100%	48.9	100%	1.8%	219.6	100%	218.2	100%	0.6%
- Scheduled	46.5	93%	45.4	93%	2.5%	200.1	91%	196.9	90%	1.6%
- Charter	3.3	7%	3.5	7%	-6.2%	19.6	9%	21.3	10%	-8.3%



UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in the table and graph 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.

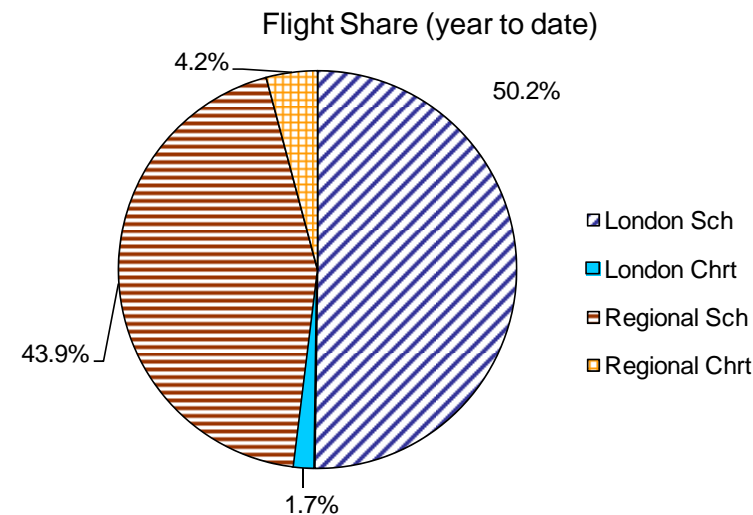
In quarter 4 2012, compared to the same quarter last year, London airports handled 2.3% more passengers, and regional airports saw an increase of 1.1%. For the calendar year 2012, passenger numbers were 1.0% and 0.1% higher than in 2011 at London airports and regional airports respectively.

Across all UK airports, the number of passengers on scheduled flights was up 2.5% and down 6.2% on charter flights compared with quarter 4 2011.



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

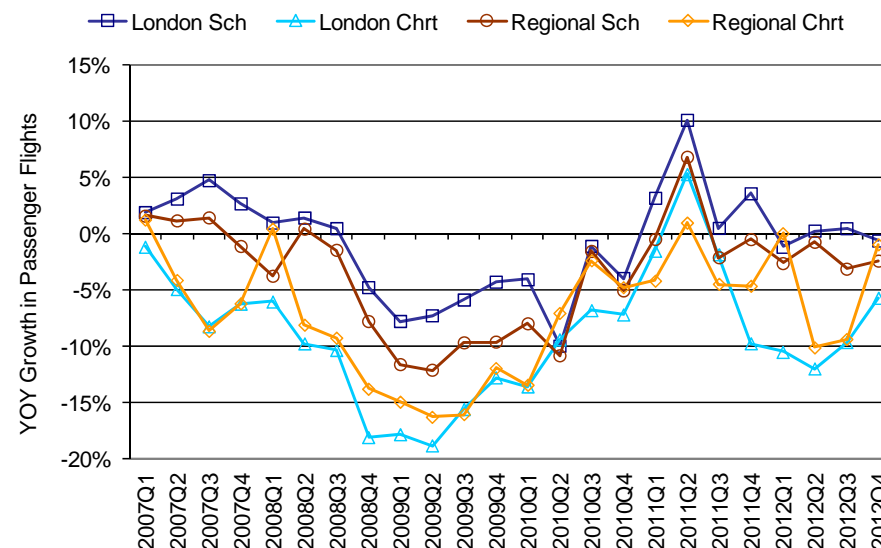
Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2012		Q4 2011		+/- %	Q1 12 – Q4 12		Q1 11 – Q4 11		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
London Airports	229.0	53%	230.8	53%	-0.8%	972.2	52%	977.9	51%	-0.6%
- Scheduled	223.4	52%	224.8	51%	-0.6%	939.7	50%	941.9	50%	-0.2%
- Charter	5.6	1%	6.0	1%	-5.7%	32.5	2%	36.0	2%	-9.8%
Regional Airports	202.9	47%	207.7	47%	-2.3%	899.2	48%	923.4	49%	-2.6%
- Scheduled	188.1	44%	192.7	44%	-2.4%	821.3	44%	839.9	44%	-2.2%
- Charter	14.8	3%	15.0	3%	-1.0%	77.9	4%	83.5	4%	-6.7%
All Airports	431.9	100%	438.5	100%	-1.5%	1,871.4	100%	1,901.3	100%	-1.6%
- Scheduled	411.4	95%	417.5	95%	-1.4%	1,761.0	94%	1,781.8	94%	-1.2%
- Charter	20.5	5%	21.0	5%	-2.3%	110.4	6%	119.5	6%	-7.6%



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

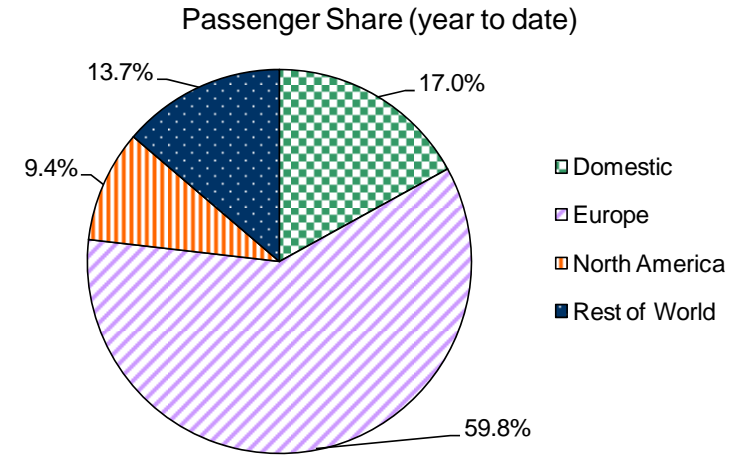
Compared to quarter 4 2011, the number of passenger flights at all UK airports decreased by 1.5% in quarter 4 2012. There were 1.4% fewer scheduled flights and 2.3% fewer charter flights. For 2012, the numbers of scheduled and charter flights were down 1.2% and 7.6% respectively from 2011.

There were 0.8% fewer flights at London airports and 2.3% fewer flights at regional airports in quarter 4 2012 than in the same period in 2011. In 2012, compared with 2011, the number of flights was down 0.6% at London airports, and decreased by 2.6% at regional airports.



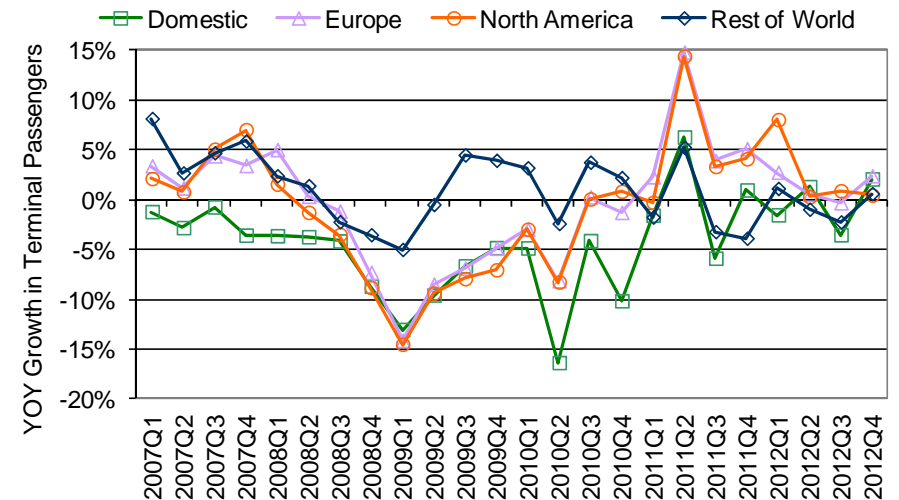
4. Terminal passengers at UK airports by origin / destination see note 5 on p.14

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2012		Q4 2011		+/- %	Q1 12 – Q4 12		Q1 11 – Q4 11		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
Domestic	9.3	19%	9.1	19%	2.0%	37.3	17%	37.5	17%	-0.5%
- Scheduled	9.2	18%	9.0	18%	1.7%	36.9	17%	37.2	17%	-0.6%
- Charter	0.1	0.2%	0.1	0.2%	34.0%	0.4	0.2%	0.4	0.2%	11.6%
Europe	28.3	57%	27.7	57%	2.4%	131.4	60%	130.1	60%	1.0%
- Scheduled	26.0	52%	25.1	51%	3.4%	115.7	53%	112.7	52%	2.6%
- Charter	2.4	5%	2.6	5%	-8.1%	15.7	7%	17.3	8%	-9.5%
North America	4.7	9%	4.7	10%	0.4%	20.7	9%	20.3	9%	1.9%
- Scheduled	4.7	9%	4.7	10%	0.3%	20.3	9%	19.9	9%	2.2%
- Charter	0.1	0.1%	0.1	0.1%	9.1%	0.4	0.2%	0.4	0.2%	-10.4%
Rest of World	7.5	15%	7.4	15%	0.6%	30.2	14%	30.3	14%	-0.4%
- Scheduled	6.7	14%	6.7	14%	1.3%	27.1	12%	27.1	12%	0.0%
- Charter	0.7	1%	0.8	2%	-5.4%	3.1	1%	3.2	1%	-3.7%
Total	49.8	100%	48.9	100%	1.8%	219.6	100%	218.2	100%	0.6%
- Scheduled	46.5	93%	45.4	93%	2.5%	200.1	91%	196.9	90%	1.6%
- Charter	3.3	7%	3.5	7%	-6.2%	19.6	9%	21.3	10%	-8.3%



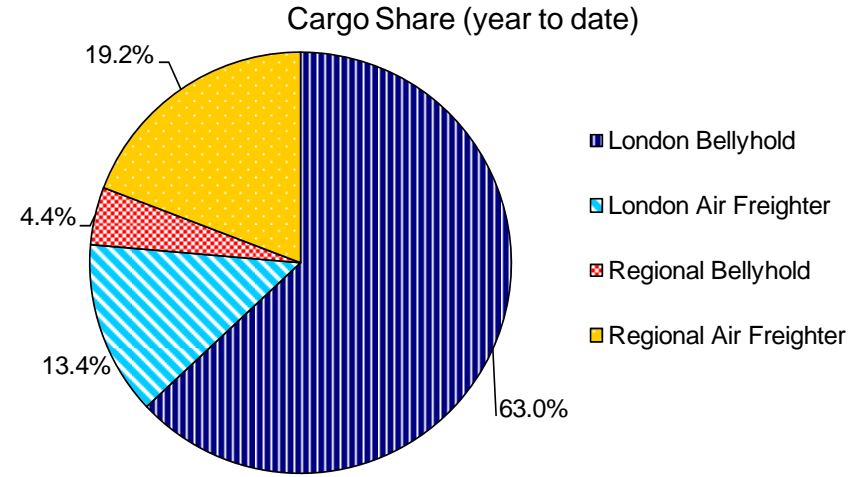
Compared to the same quarter last year, in quarter 4 2012, there have been increases in the number of passengers travelling to and from North America (0.4%), domestic destinations (2.0%), Europe (2.4%) and Rest of the world (0.6%).

In 2012, the total number of passengers was up 0.6%. The numbers of passengers travelling to and from Europe and North America rose by 1.0% and 1.9% respectively, whereas domestic destinations and Rest of the world saw a decrease of 0.5% and 0.4% respectively.



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

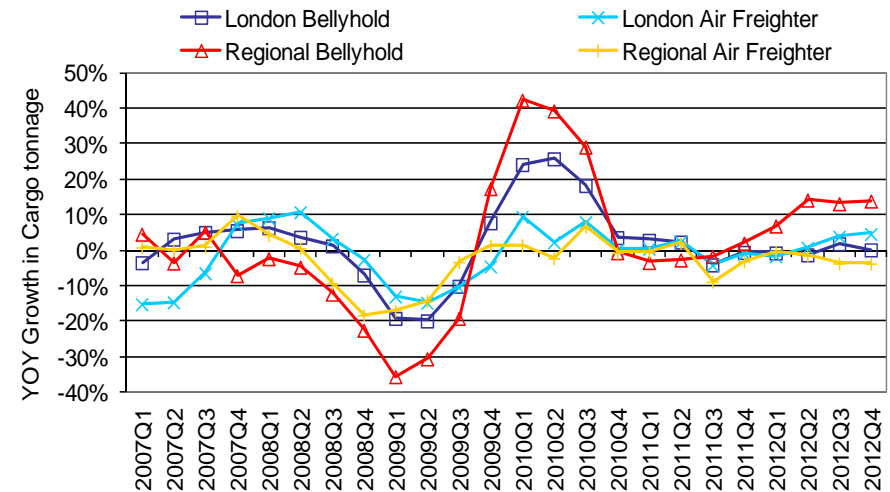
Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2012		Q4 2011		+/- %	Q1 12 – Q4 12		Q1 11 – Q4 11		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
Cargo on cargo only flights	213.8	33%	214.5	33%	-0.3%	821.7	33%	825.9	33%	-0.5%
- London	88.1	14%	84.1	13%	4.7%	337.0	13%	330.4	13%	2.0%
- Regional	125.7	19%	130.4	20%	-3.6%	484.6	19%	495.5	20%	-2.2%
Bellyhold cargo	434.9	67%	430.3	67%	1.1%	1,702.6	67%	1,688.7	67%	0.8%
- London	406.0	63%	404.9	63%	0.3%	1,590.8	63%	1,589.1	63%	0.1%
- Regional	28.9	4%	25.4	4%	14.0%	111.8	4%	99.6	4%	12.2%
Total cargo	648.7	100%	644.8	100%	0.6%	2,524.2	100%	2,514.6	100%	0.4%
- London	494.1	76%	489.0	76%	1.0%	1,927.8	76%	1,919.5	76%	0.4%
- Regional	154.6	24%	155.7	24%	-0.7%	596.4	24%	595.1	24%	0.2%



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

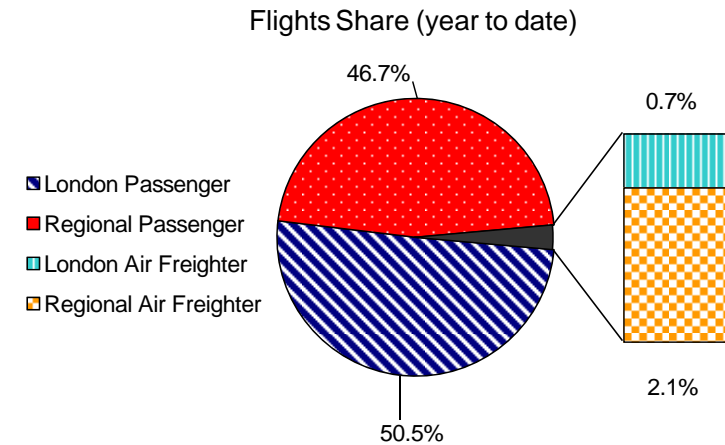
Compared to the same period in 2011, in quarter 4 2012, total cargo tonnage at all UK airports was up 0.6%. It increased by 1.0% at London airports and decreased by 0.7% at Regional airports. Overall, cargo tonnage increased by 0.4% from 2011 to 2012.

Air freighter cargo tonnage dropped by 0.3% whereas bellyhold cargo tonnage rose 1.1% compared with the same quarter last year.



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

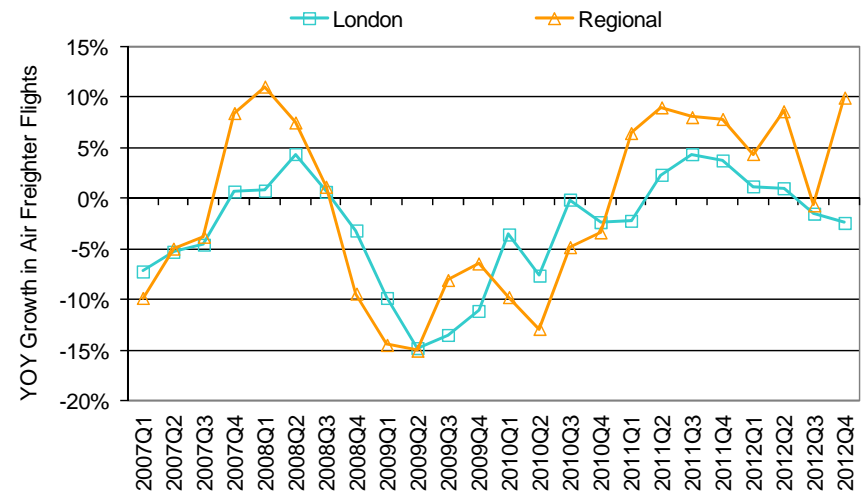
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2012		Q4 2011		+/- %	Q1 12 – Q4 12		Q1 11 – Q4 11		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
Air freighter	2B0B1B	3%	13.6	3%	6.7%	54.7	3%	52.6	3%	3.9%
- London	14.5		3.5	1%	-2.4%	14.1	1%	14.2	1%	-0.5%
- Regional	11.0	2%	10.0	2%	10.0%	40.6	2%	38.5	2%	5.5%
Passenger flights	431.9	97%	438.5	97%	-1.5%	1,871.4	97%	1,901.3	97%	-1.6%
- London	229.0	51%	230.8	51%	-0.8%	972.2	50%	977.9	50%	-0.6%
- Regional	202.9	45%	207.7	46%	-2.3%	899.2	47%	923.4	47%	-2.6%
Total flights	446.4	100%	452.0	100%	-1.2%	1,926.1	100%	1,954.0	100%	-1.4%
- London	232.5	52%	234.3	52%	-0.8%	986.3	51%	992.1	51%	-0.6%
- Regional	213.9	48%	217.7	48%	-1.7%	939.8	49%	961.8	49%	-2.3%



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 quarter 4 2012, the total number of commercial flights in the UK was down 1.2% compared to the same quarter in 2011. The number of air freighter flights increased by 6.7%, and that of passenger flights dropped by 1.5%.

London airports saw a decrease of 0.8% whereas regional airports experienced a drop of 1.7%. On a rolling year basis, the total number of flights was down 1.4%.



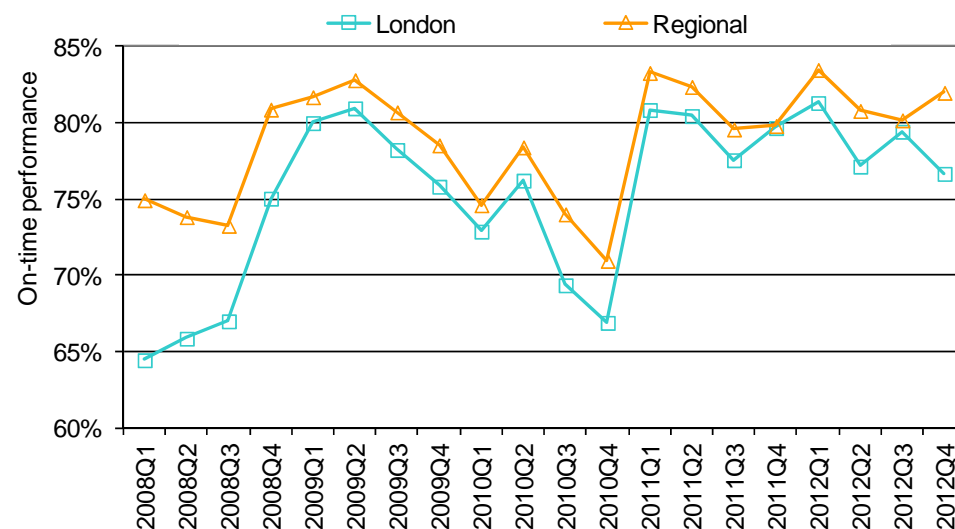
7. Punctuality of passenger flights to and from UK airports see note 6 on p.14

Matched flights (000s), % of flights on-time, average delay (mins)	CURRENT QUARTER						ROLLING YEAR					
	Q4 2012			Q4 2011			Q1 12 – Q4 12			Q1 11 – Q4 11		
	Flights (000s)	% on-time	Avg. delay (mins)	Flights (000s)	% on-time	Avg. delay (mins)	Flights (000s)	% on-time	Avg. delay (mins)	Flights (000s)	% on-time	Avg. delay (mins)
London Airports	225.8	76.7%	13.2	229.4	79.7%	11.3	960.0	78.7%	12.3	971.8	79.6%	11.4
- Heathrow	113.6	74.0%	14.6	116.2	76.8%	12.5	468.1	76.3%	13.3	472.9	77.8%	12.0
- Gatwick	53.5	76.4%	13.3	54.6	81.8%	10.6	239.2	77.8%	13.3	243.3	79.0%	12.5
- Stansted	27.6	81.1%	10.8	28.0	85.4%	8.2	120.6	83.3%	9.4	126.4	84.7%	8.6
- Luton	15.2	79.6%	12.5	15.4	78.2%	12.6	67.8	80.5%	11.8	68.3	78.1%	12.6
- London City	15.8	86.6%	8.1	15.2	85.2%	8.6	64.3	88.1%	6.8	61.0	87.4%	7.7
Regional Airports	102.8	82.0%	11.1	103.0	79.8%	12.2	452.6	81.5%	11.7	450.1	81.2%	11.8
- Manchester	35.9	78.7%	13.0	35.6	74.3%	15.3	158.4	77.2%	14.4	155.1	76.8%	14.5
- Birmingham	18.8	84.7%	9.4	18.6	84.2%	10.2	83.1	84.0%	10.3	82.7	84.3%	10.4
- Glasgow	16.9	83.5%	10.5	16.3	83.2%	10.7	71.6	83.4%	10.8	69.5	83.0%	11.0
- Edinburgh	22.0	84.2%	9.5	23.1	80.5%	11.0	97.6	84.0%	9.5	99.8	83.2%	9.9
- Newcastle	9.3	81.6%	12.1	9.4	84.7%	10.1	41.9	83.9%	10.8	43.0	83.5%	10.4
All 10 Airports	328.6	78.4%	12.6	332.4	79.7%	11.6	1,412.6	79.6%	12.1	1,421.9	80.1%	11.6

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 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 quarter 4 2012, 78.4% of all measured flights were on time, which was down 1.3 percentage points compared to the same quarter last year. Average delay per flight was 12.6 minutes, one minute longer than that in quarter 4 2011. Among London airports, Luton and London City saw an improvement in on-time performance. For Regional airports, Manchester, Birmingham, Glasgow and Edinburgh had a higher percentage of flights on time compared to quarter 4 2012.

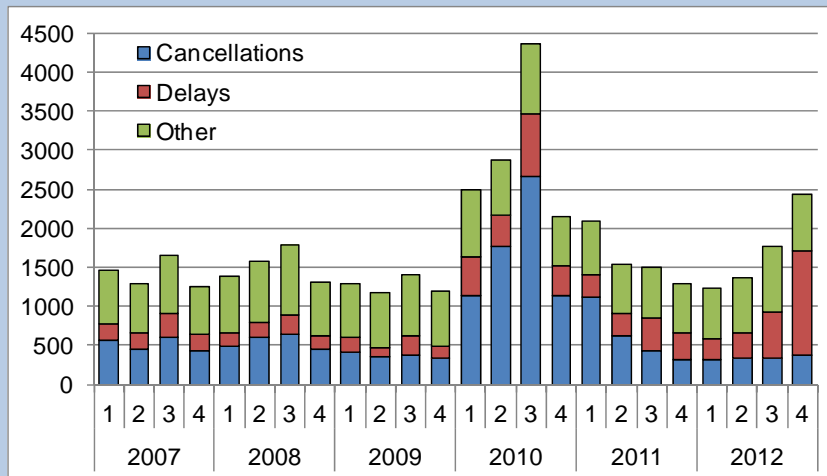


Did you know? Data on passenger's complaints to the CAA

In 2012, the CAA started publishing data on the reason and the companies that were the object of passenger complaints the CAA receives. This data is available from our website:

<http://www.caa.co.uk/default.aspx?catid=80&pagetype=88&pageid=27&sglid=27>

Complaints received by quarter and by reason, Q1 2007 to Q4 2012



Source: CAA Passenger Complaints

Typically, passenger complaints are only received by the CAA once the complaint has been put to the company in question and where the passenger has not been satisfied by their response.

The chart on the right shows the number of complaints received by the CAA by quarter by reason. During 2012 the CAA received 6,800 complaints, 6% more than in 2011. In the last quarter of 2012, delay complaint numbers increased significantly as a result of a decision from the European Court of Justice that confirmed passengers have a right to compensation when their flight is delayed by longer than three hours, unless the delay is outside the airline's control.

Complaints were higher in 2010 as a result of significant disruption experienced by the aviation industry during that year, caused by volcanic ash, severe weather and industrial action.

The number and type of complaint for a selection of airlines (for which the CAA received fifty or more passenger complaints during 2012) can also be found here

http://www.caa.co.uk/docs/80/complaints/2012/2012_Q4_year_to_end_of_December_airline.pdf

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, 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 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.