

Aviation Trends

Quarter 4 2013



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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 presents interesting facts derived from the various data sources available to the CAA; this time we look at the drive-time between the UK airports.

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

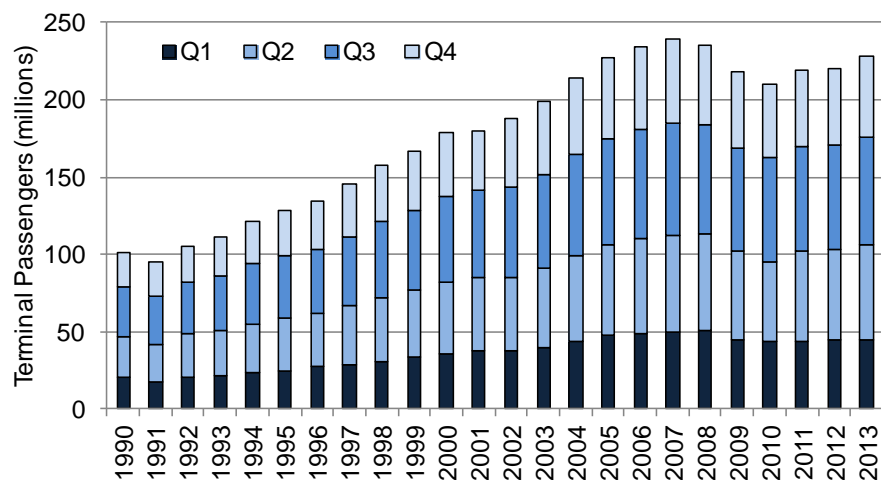
The Aviation Trends series is available at www.caa.co.uk/aviationtrends, part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications. Please note that historic numbers may be subject to minor change as the result of prior period adjustments¹. Due to 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.

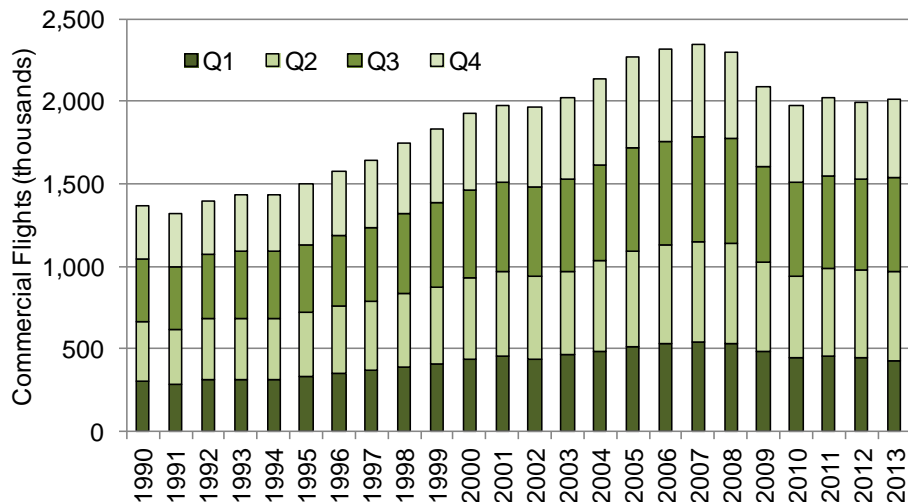
¹ Also, in editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. These islands are not formally part of the UK, and as we wish to present only the trends at UK airports, their figures are now excluded.

1. Historical overview of traffic see note 5 on p.17

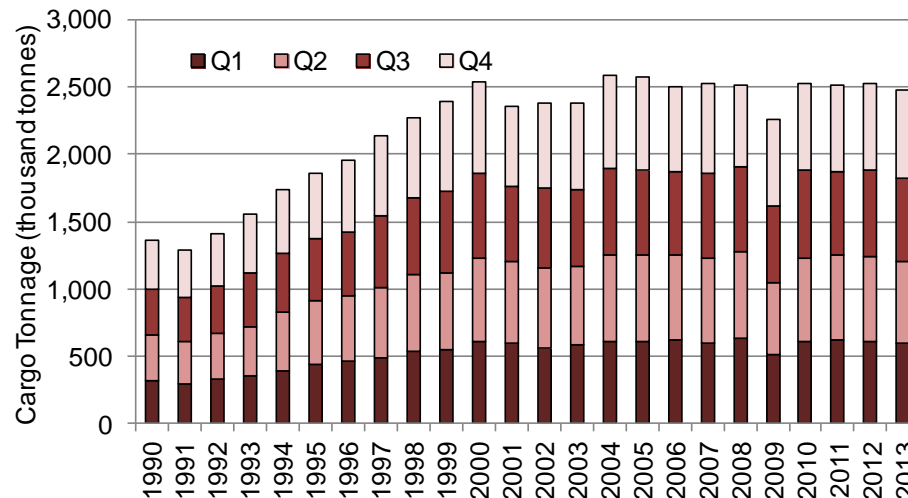
a. Terminal passengers



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 left axis), and the percentage growth on the previous year's number in the same quarter (on the right axis).

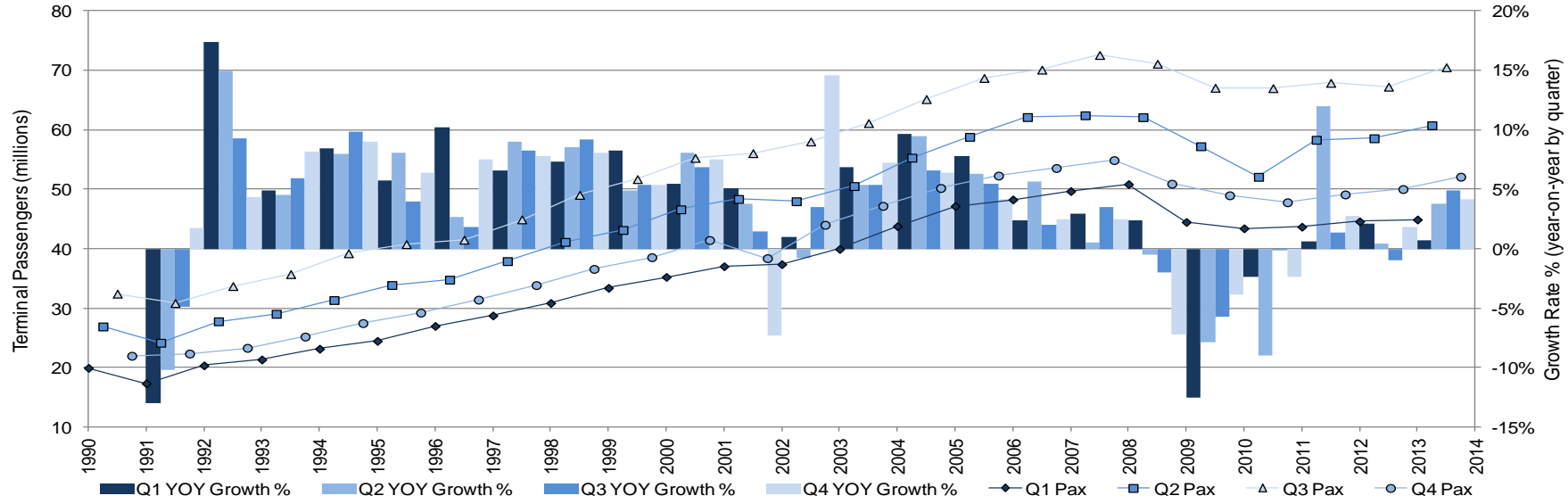
The second chart shows the rolling annual total in each quarter (on the left axis), and the percentage growth of the rolling annual total on the previous year's number in the same quarter (on the right axis). The highlighted data points are the annual traffic volumes and growth rates of the respective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

In quarter 4 2013, UK airports handled 52.1 million terminal passengers (an increase of 4.1%), 475 thousand commercial flights (an increase of 2.8%), and 651 thousand tonnes of cargo (an increase of 0.3%) compared to the same quarter last year.²

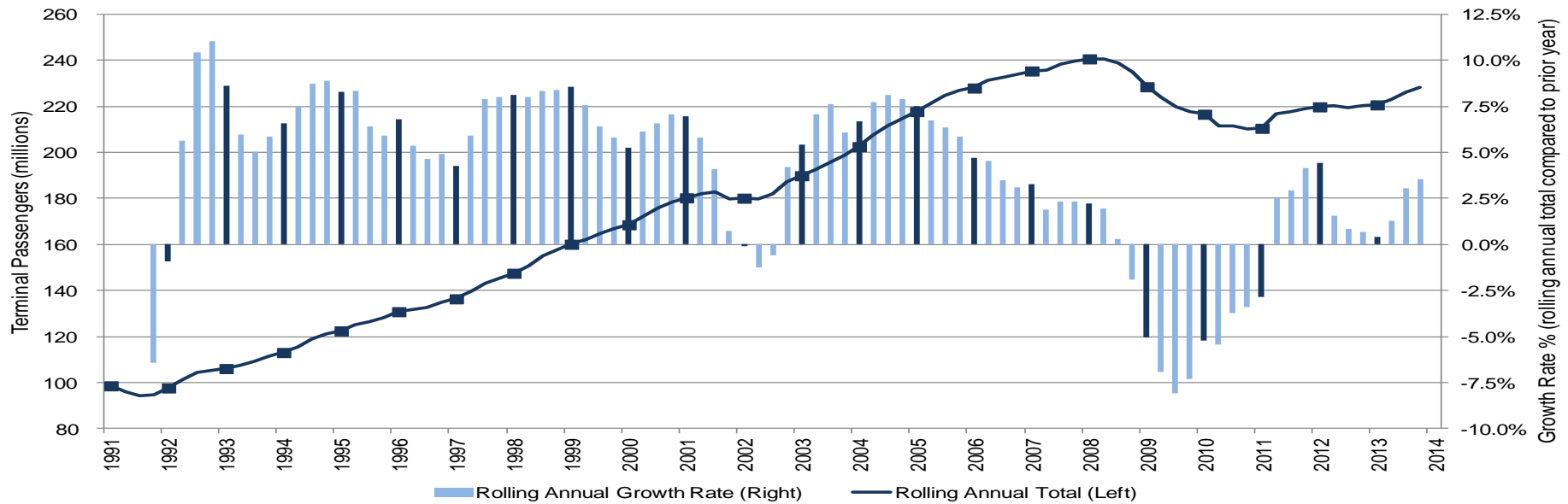
² These figures include traffic to and from North Sea oilrigs, which are excluded from the detailed tables in Parts 2 – 7.

a. Terminal passengers

Terminal Passengers - Quarterly totals and growth rates

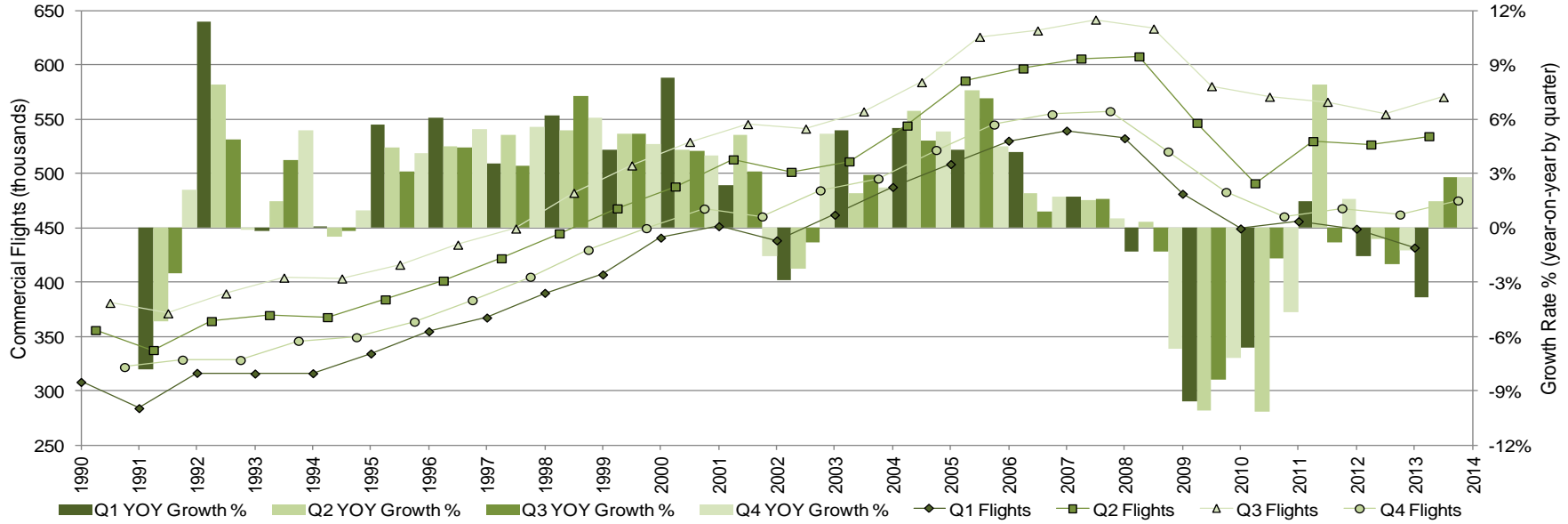


Terminal Passengers - Rolling annual totals and growth rates

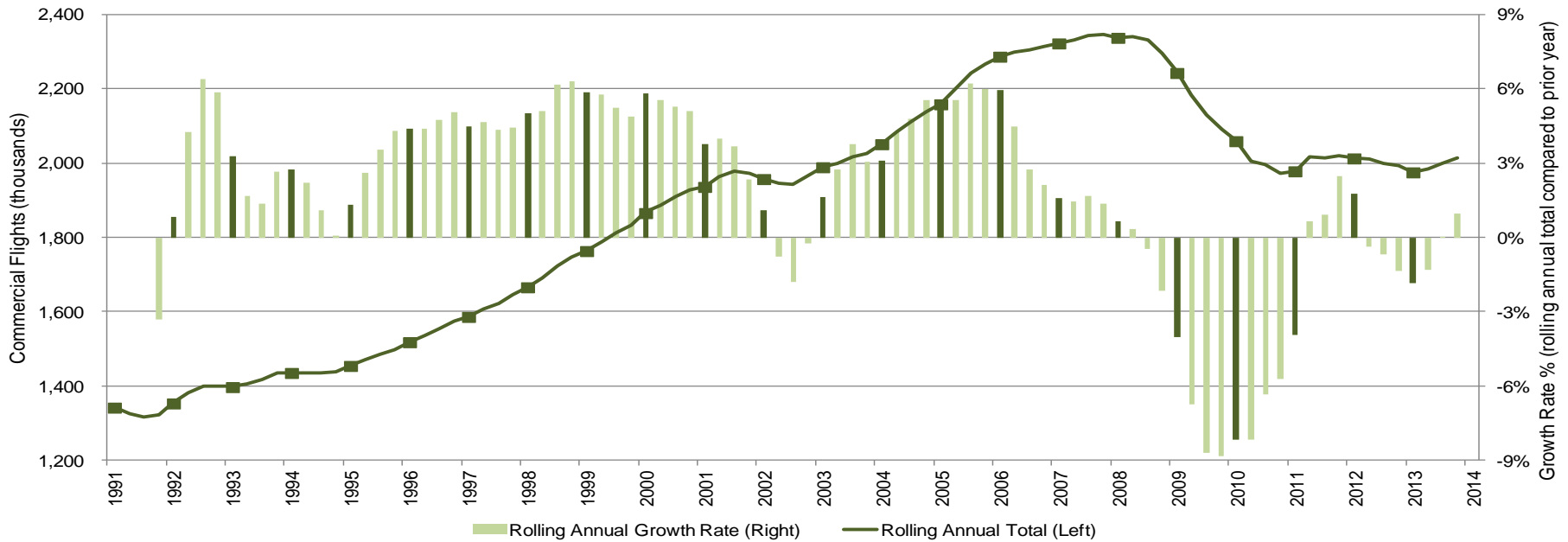


b. Commercial flights

Commercial Flights - Quarterly totals and growth rates

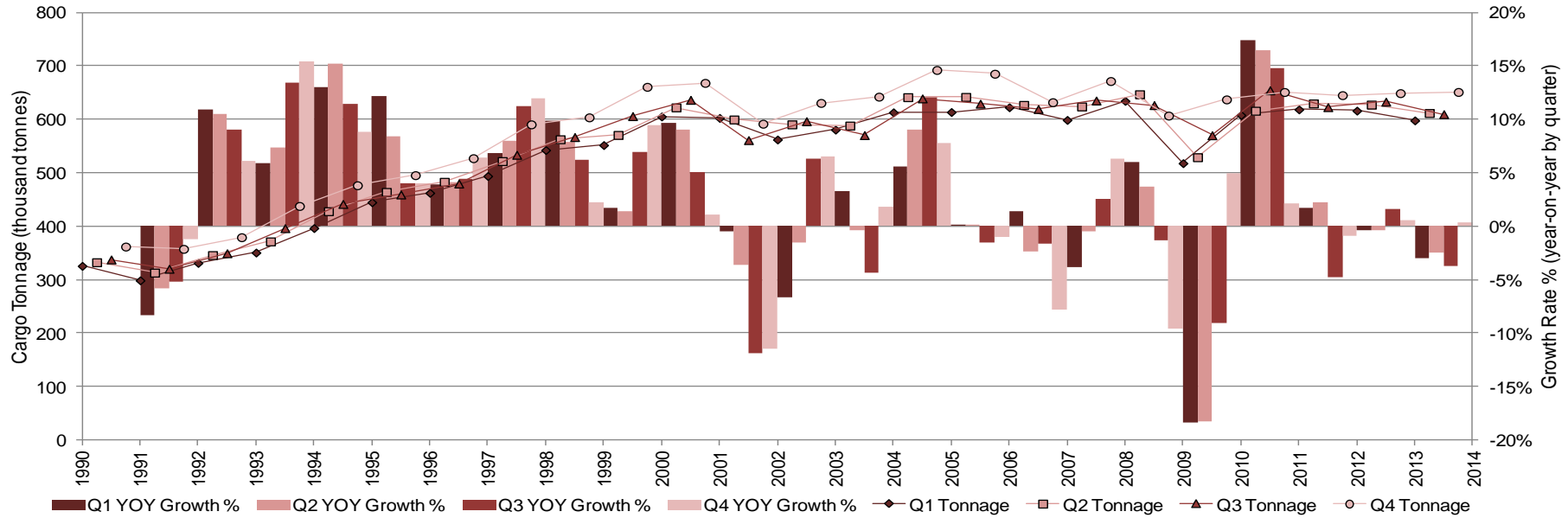


Commercial flights : Rolling annual totals and growth rates

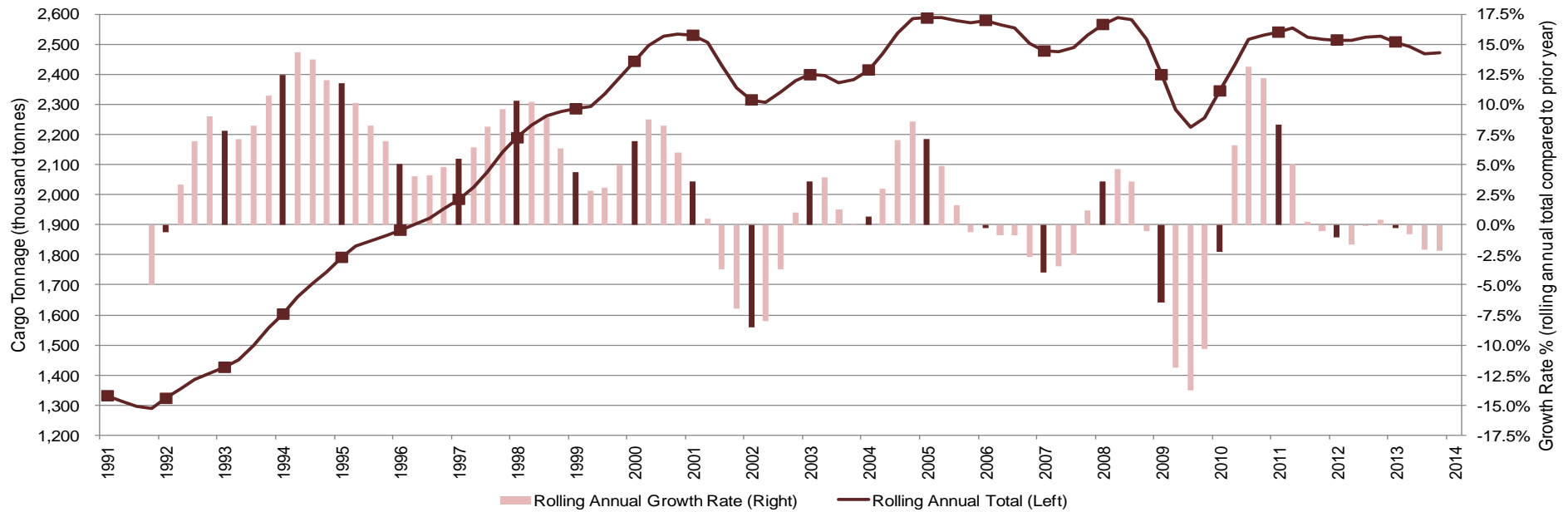


c. Cargo tonnage

Cargo Tonnage - Quarterly totals and growth rates

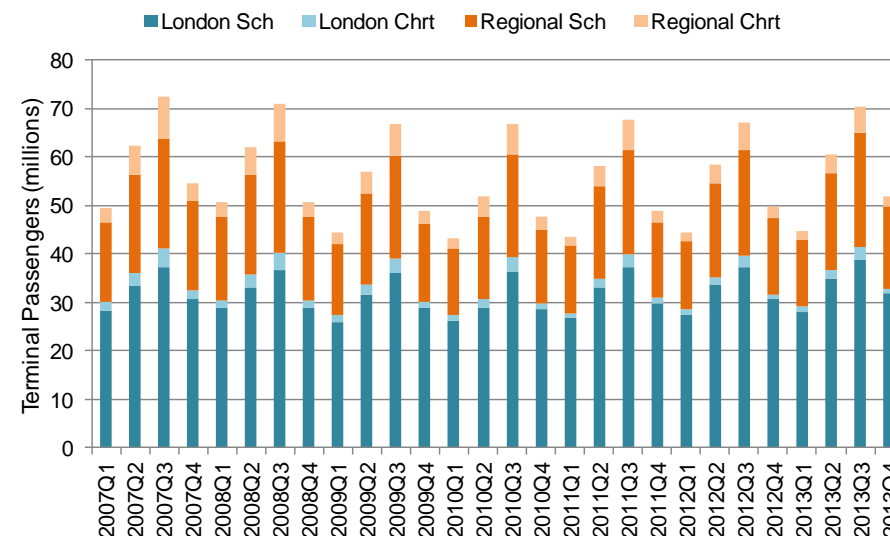


Cargo tonnage - Rolling annual totals and growth rates



2. Terminal passengers at UK airports see note 5 on p.17

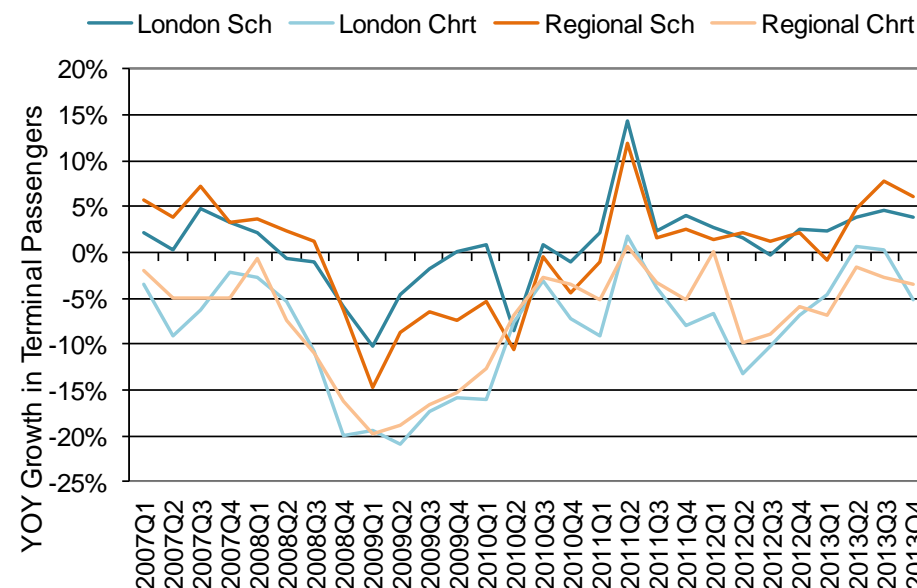
Passengers (Millions)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2013		Q4 2012		+/- %	Q1 13 – Q4 13		Q1 12 – Q4 12		+/- %
	Pax (Millions)	% of total	Pax (Millions)	% of total		Pax (Millions)	% of total	Pax (Millions)	% of total	
London Airports	32.7	63%	31.6	63%	3.6%	139.6	61%	134.9	61%	3.5%
- Scheduled	31.8	61%	30.6	61%	3.9%	133.7	59%	128.9	59%	3.7%
- Charter	0.9	2%	1.0	2%	-5.1%	5.9	3%	6.0	3%	-1.3%
Regional Airports	19.2	37%	18.3	37%	4.9%	87.8	39%	84.7	39%	3.6%
- Scheduled	16.9	33%	16.0	32%	6.1%	74.6	33%	71.1	32%	4.9%
- Charter	2.2	4%	2.3	5%	-3.5%	13.2	6%	13.6	6%	-3.1%
All Airports	51.9	100%	49.8	100%	4.1%	227.4	100%	219.6	100%	3.5%
- Scheduled	48.7	94%	46.5	93%	4.7%	208.3	92%	200.1	91%	4.1%
- Charter	3.2	6%	3.3	7%	-4.0%	19.1	8%	19.6	9%	-2.5%



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.

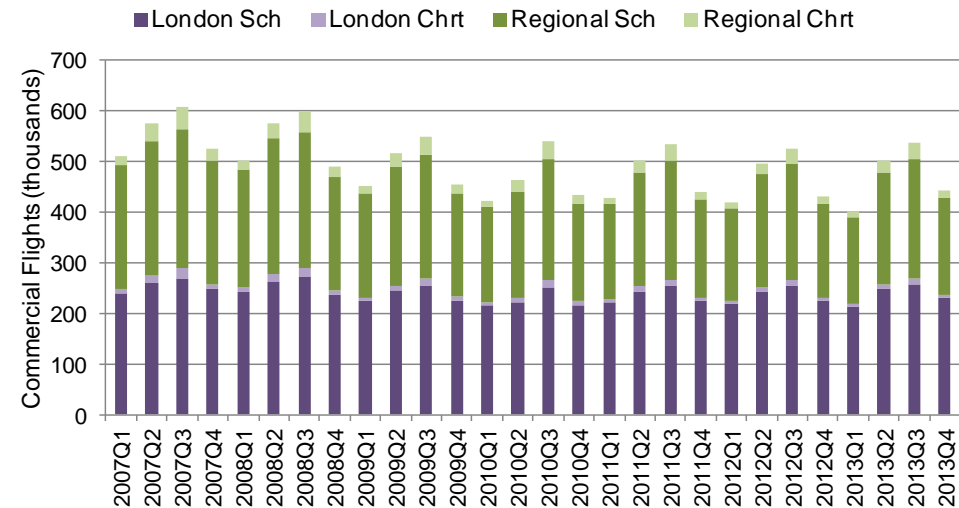
In quarter 4 2013, compared to the same quarter last year, London and regional airports handled respectively 3.6% and 4.9% more passengers. On a rolling year basis, passenger numbers were 3.5% higher at London airports and 3.6% higher at regional airports than the year before.

Across all UK airports, the number of passengers on scheduled flights was up 4.7% and down 4.0% on charter flights compared with the same quarter in 2012.



3. Passenger flights to and from UK airports see note 5 on p.17

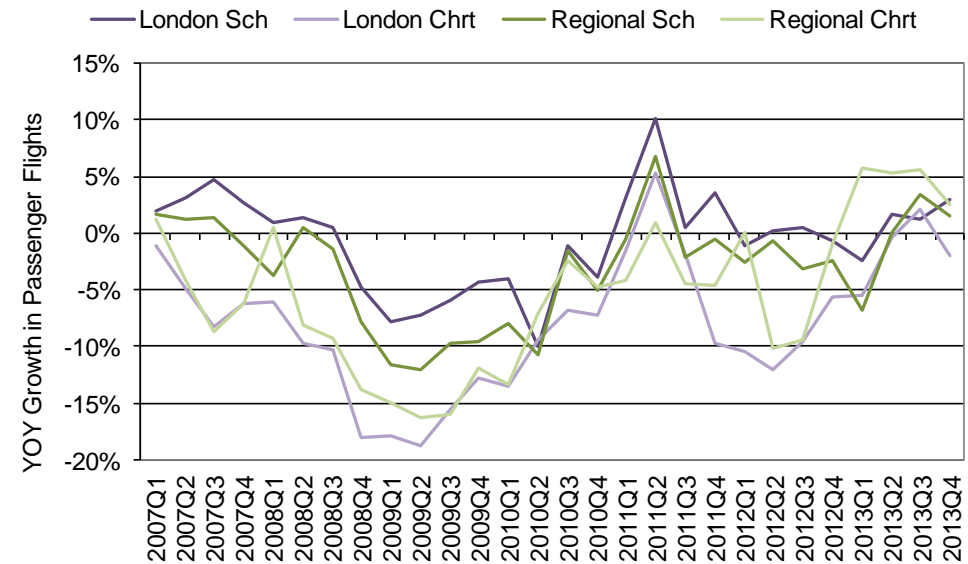
Number of flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2013		Q4 2012		+/- %	Q1 13 – Q4 13		Q1 12 – Q4 12		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
London Airports	235.5	53%	229.0	53%	2.8%	980.3	52%	972.2	52%	0.8%
- Scheduled	230.0	52%	223.4	52%	3.0%	948.0	50%	939.7	50%	0.9%
- Charter	5.5	1%	5.6	1%	-2.0%	32.3	2%	32.5	2%	-0.6%
Regional Airports	206.1	47%	202.9	47%	1.5%	901.1	48%	899.2	48%	0.2%
- Scheduled	190.8	43%	188.1	44%	1.5%	819.4	44%	821.3	44%	-0.2%
- Charter	15.2	3%	14.8	3%	2.6%	81.8	4%	77.9	4%	5.0%
All Airports	441.6	100%	431.9	100%	2.2%	1,881.5	100%	1,871.4	100%	0.5%
- Scheduled	420.8	95%	411.4	95%	2.3%	1,767.4	94%	1,761.0	94%	0.4%
- Charter	20.7	5%	20.5	5%	1.3%	114.1	6%	110.4	6%	3.3%



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

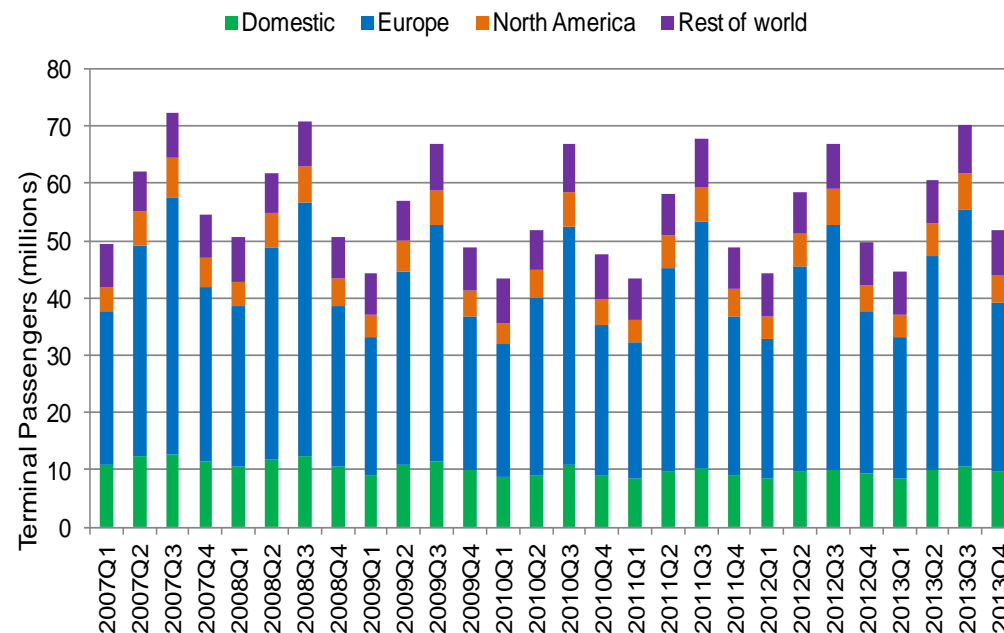
Compared to quarter 4 2012, the number of passenger flights at all UK airports increased by 2.2% in quarter 4 2013. There were 2.3% more scheduled flights and 1.3% more charter flights. On the rolling year basis, the number of scheduled flights was up 0.4% and the number of charter flights was up 3.3%.

There were 2.8% more flights at the London airports and 1.5% more flights at regional airports in quarter 4 2013 than in the same period in 2012. On the rolling year basis, the number of flights was up 0.8% at the London airports and was up 0.2% at the regional airports.



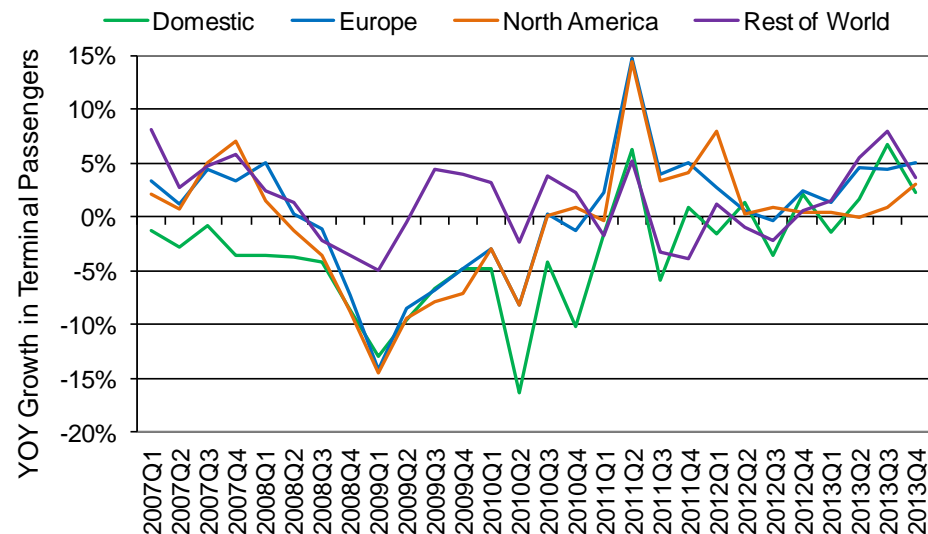
4. Terminal passengers at UK airports by origin / destination see note 5 on p.17

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2013		Q4 2012		+/- %	Q1 13 – Q4 13		Q1 12 – Q4 12		+/- %
	Pax (millions)	% of total	Pax (millions)	% of total		Pax (millions)	% of total	Pax (millions)	% of total	
Domestic	9.5	18%	9.3	19%	2.3%	38.2	17%	37.3	17%	2.4%
- Scheduled	9.4	18%	9.2	18%	2.2%	37.8	17%	36.9	17%	2.2%
- Charter	0.1	0.2%	0.1	0.2%	7.3%	0.5	0.2%	0.4	0.2%	22.1%
Europe	29.7	57%	28.3	57%	5.0%	136.6	60%	131.4	60%	4.0%
- Scheduled	27.4	53%	26.0	52%	5.7%	121.5	53%	115.7	53%	5.0%
- Charter	2.3	4%	2.4	5%	-2.9%	15.1	7%	15.7	7%	-3.4%
North America	4.9	9%	4.7	9%	3.0%	20.9	9%	20.7	9%	1.0%
- Scheduled	4.8	9%	4.7	9%	3.7%	20.7	9%	20.3	9%	1.9%
- Charter	0.0	0.1%	0.1	0.1%	-45.7%	0.2	0.1%	0.4	0.2%	-44.0%
Rest of World	7.8	15%	7.5	15%	3.6%	31.6	14%	30.2	14%	4.6%
- Scheduled	7.1	14%	6.7	14%	4.6%	28.4	12%	27.1	12%	4.7%
- Charter	0.7	1%	0.7	1%	-5.5%	3.2	1%	3.1	1%	3.9%
Total	51.9	100%	49.8	100%	4.1%	227.4	100%	219.6	100%	3.5%
- Scheduled	48.7	94%	46.5	93%	4.7%	208.3	92%	200.1	91%	4.1%
- Charter	3.2	6%	3.3	7%	-4.0%	19.1	8%	19.6	9%	-2.5%



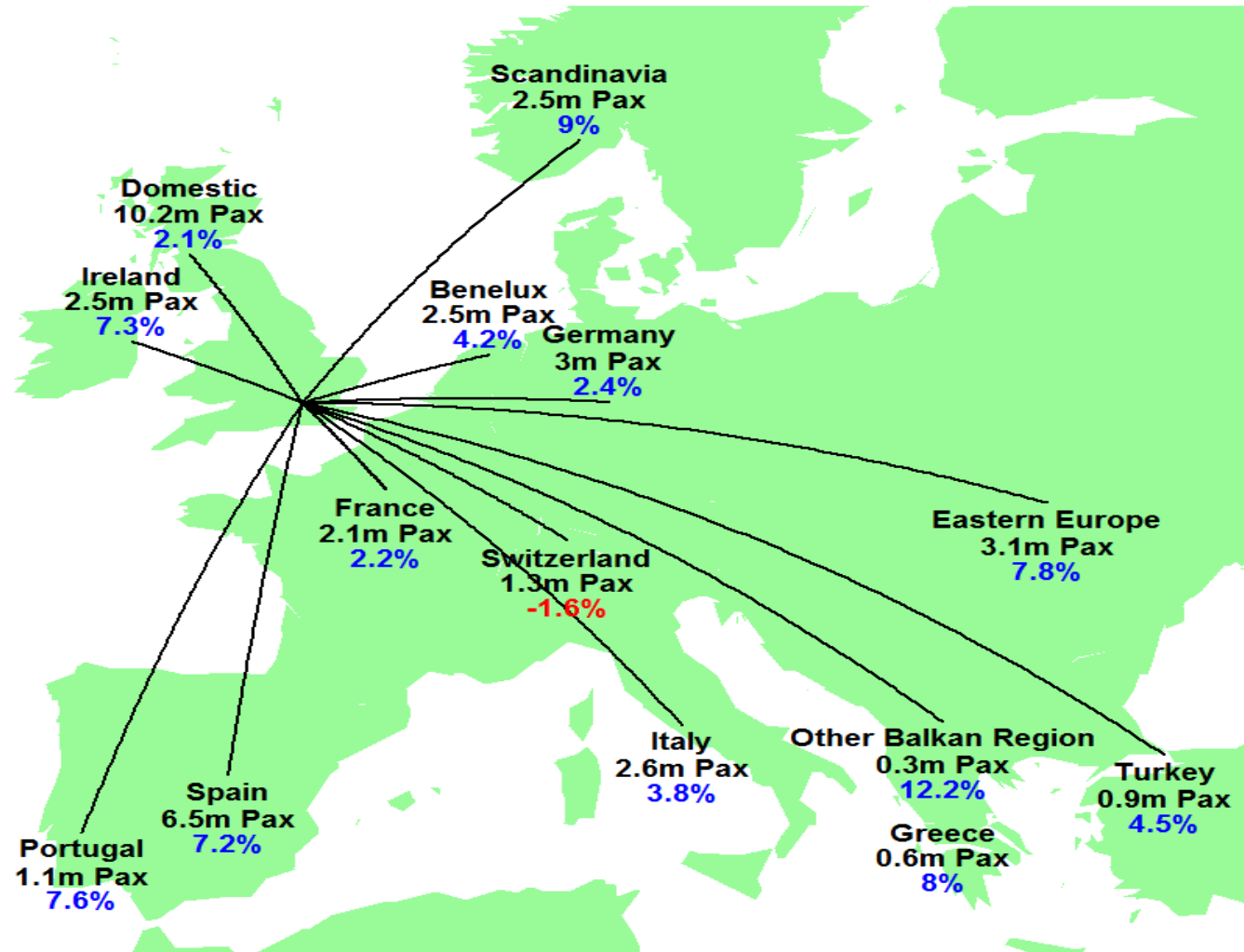
Compared to the same quarter last year, in quarter 4 2013, there have been increases in the number of passengers travelling to and from Europe (5.0%), Rest of the World (3.6%), North America (3.0%) and Domestic destinations (2.3%).

On the rolling year basis, the total number of passengers was up 3.5%. The numbers of passengers travelling to and from Rest of the World, Europe, domestic destinations and North America rose by 4.6%, 4.0%, 2.4% and 1.0% respectively.



a. Passengers at UK airports by origin/destination – Travel within Europe ^{see note 6 on p. 17}

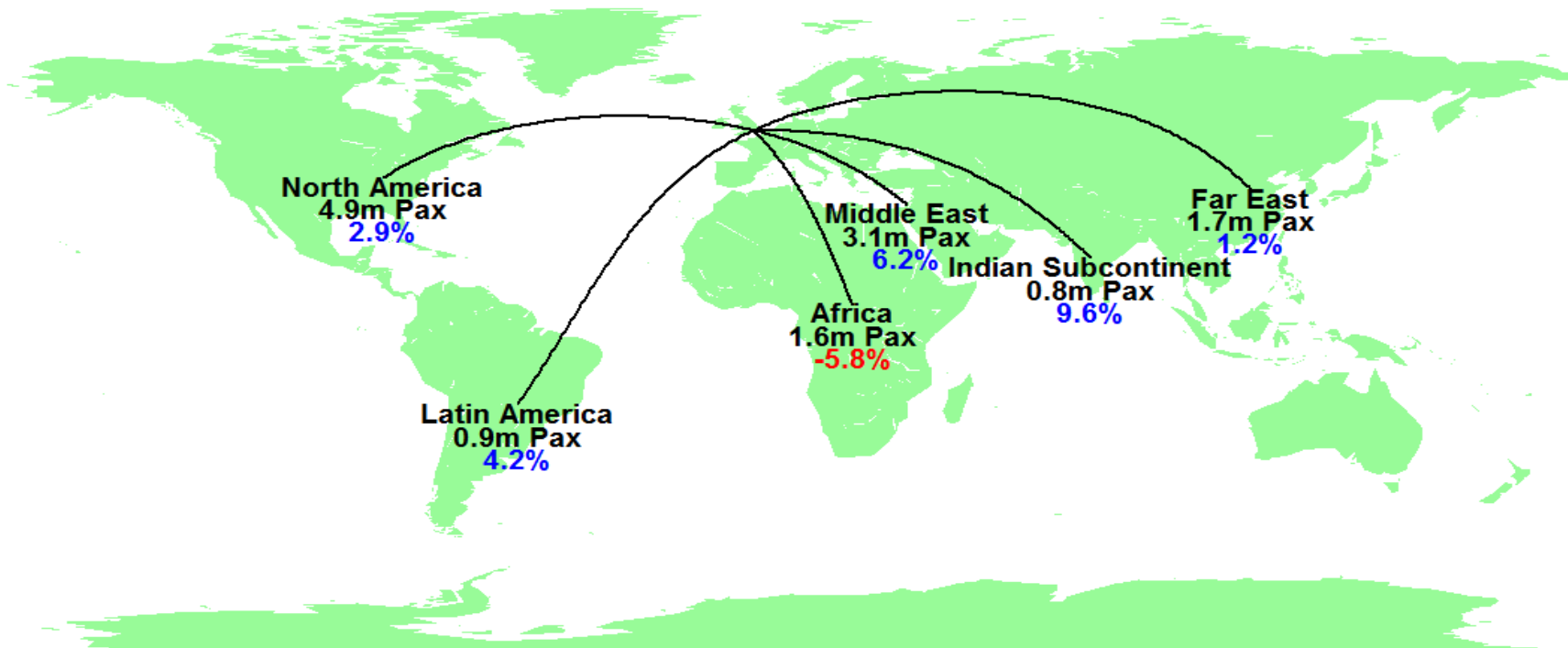
Total passengers numbers Q4 2013 and % change from Q4 2012



Note: passenger destination is defined by the first stop for the aircraft after leaving the reporting airport, or the last stop before arriving at the reporting airport. Hence for a multi-sector flight, the first/last part of the flight is shown.

b. Passengers at the UK airports by origin/destination – Travel outside of Europe

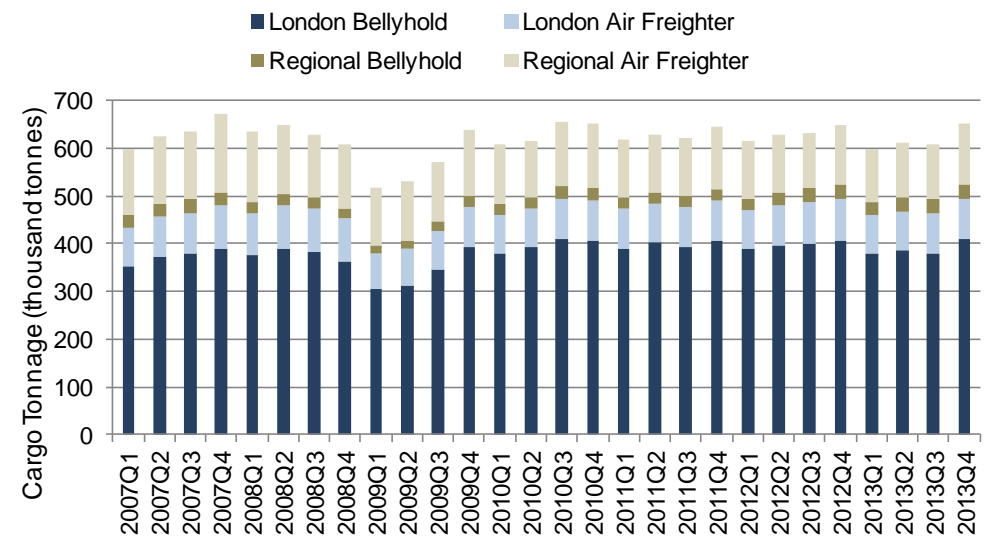
Total passengers numbers Q4 2013 and % change from Q4 2012



Note: passenger destination is defined by the first stop for the aircraft after leaving the reporting airport, or the last stop before arriving at the reporting airport. Hence for a multi-sector flight, the first/last part of the flight is shown.

5. Air cargo tonnes carried to and from UK airports see note 5 on p.17

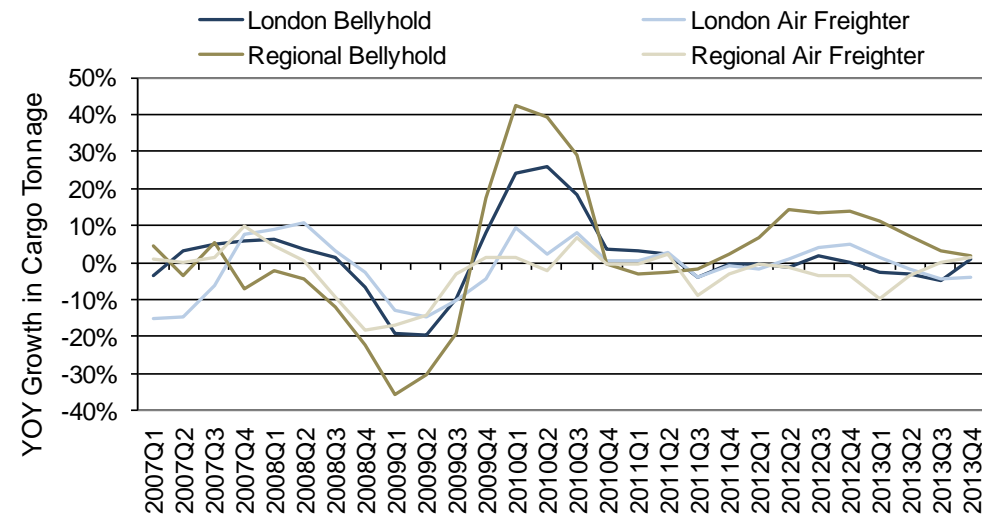
Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2013		Q4 2012		+/- %	Q1 13 – Q4 13		Q1 12 – Q4 12		+/- %
	Tonnes (000s)	% of total	Tonnes (000s)	% of total		Tonnes (000s)	% of total	Tonnes (000s)	% of total	
Cargo on cargo only flights	211.7	33%	213.8	33%	-0.9%	799.6	32%	821.7	33%	-2.7%
- London	84.6	13%	88.1	14%	-4.0%	329.7	13%	337.0	13%	-2.2%
- Regional	127.1	20%	125.7	19%	1.2%	469.9	19%	484.6	19%	-3.0%
Bellyhold cargo	439.1	67%	434.9	67%	1.0%	1,669.9	68%	1,702.6	67%	-1.9%
- London	409.7	63%	406.0	63%	0.9%	1,552.0	63%	1,590.8	63%	-2.4%
- Regional	29.4	5%	28.9	4%	1.7%	118.0	5%	111.8	4%	5.5%
Total cargo	650.9	100%	648.7	100%	0.3%	2,469.6	100%	2,524.2	100%	-2.2%
- London	494.3	76%	494.1	76%	0.1%	1,881.7	76%	1,927.8	76%	-2.4%
- Regional	156.5	24%	154.6	24%	1.3%	587.9	24%	596.4	24%	-1.4%



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

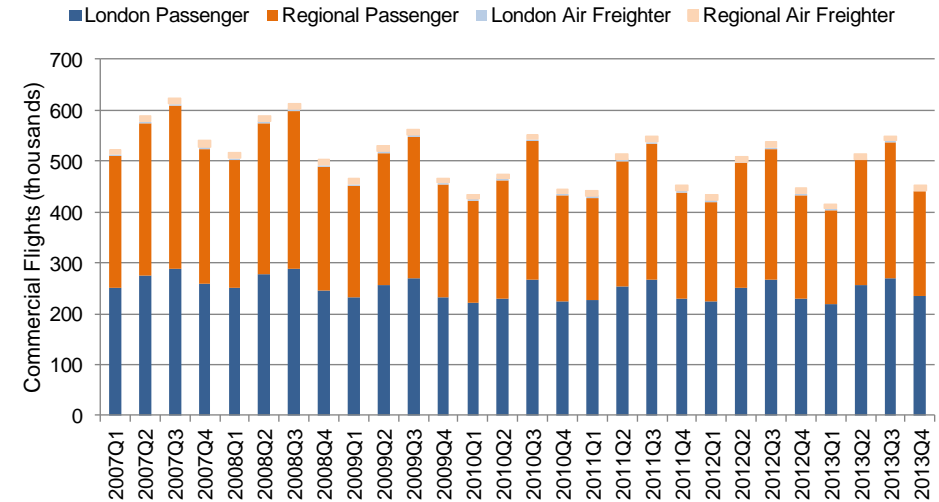
Compared to the same period in 2012, in quarter 4 2013, total cargo tonnage at all UK airports was up 0.3%. It increased by 0.1% at London airports and by 1.3% at Regional airports. Air freighter cargo tonnage dropped by 0.9% and bellyhold cargo tonnage increased by 1.0% compared with the same quarter last year.

On a rolling year basis, total cargo tonnage handled at UK airports was down 2.2% compared with the year before.



6. All commercial flights to and from UK airports see note 5 on p.17

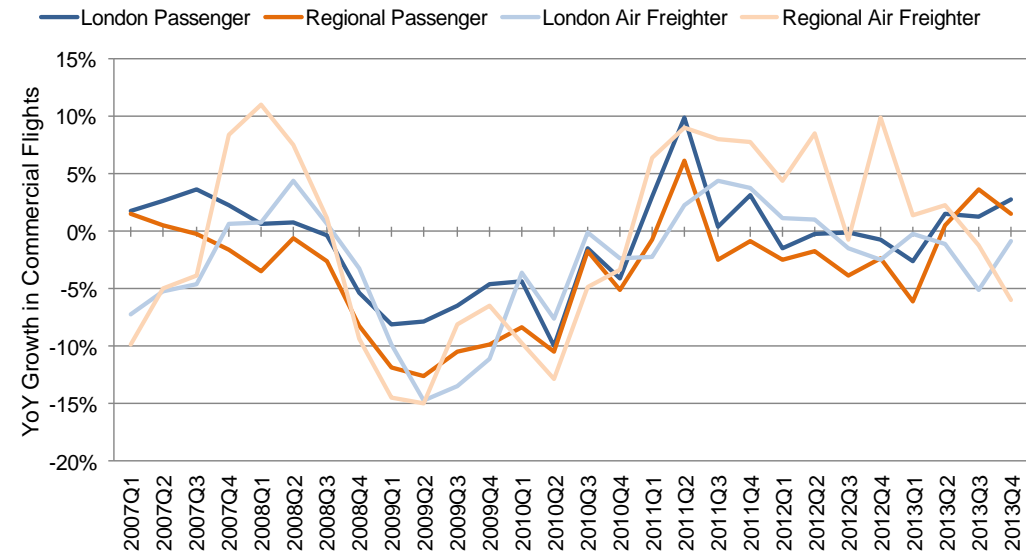
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2013		Q4 2012		+/- %	Q1 13 – Q4 13		Q1 12 – Q4 12		+/- %
	Flights (000s)	% of total	Flights (000s)	% of total		Flights (000s)	% of total	Flights (000s)	% of total	
Air freighter	13.8	3%	14.5	3%	-4.8%	54.0	3%	54.7	3%	-1.3%
- London	3.4	1%	3.5	1%	-0.8%	13.9	1%	14.1	1%	-1.8%
- Regional	10.3	2%	11.0	2%	-6.0%	40.1	2%	40.6	2%	-1.1%
Passenger flights	441.6	97%	431.9	97%	2.2%	1,881.5	97%	1,871.4	97%	0.5%
- London	235.5	52%	229.0	51%	2.8%	980.3	51%	972.2	50%	0.8%
- Regional	206.1	45%	202.9	45%	1.5%	901.1	47%	899.2	47%	0.2%
Total flights	455.4	100%	446.4	100%	2.0%	1,935.4	100%	1,926.1	100%	0.5%
- London	239.0	52%	232.5	52%	2.8%	994.2	51%	986.3	51%	0.8%
- Regional	216.4	48%	213.9	48%	1.2%	941.3	49%	939.8	49%	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.

In quarter 4 2013, the total number of commercial flights in the UK was up 2.0% compared to the same quarter in 2012. The number of passenger flights has increased by 2.2% and the number of freighter flights had decreased by 4.8%.

The London airports saw an increase of 2.8% whereas the regional airports experienced an increase of 1.2%. On a rolling year basis, the total number of flights was up 0.5% compared with the year before.



7. Punctuality of passenger flights to and from UK airports see note 7 on p.17

a. On-time performance

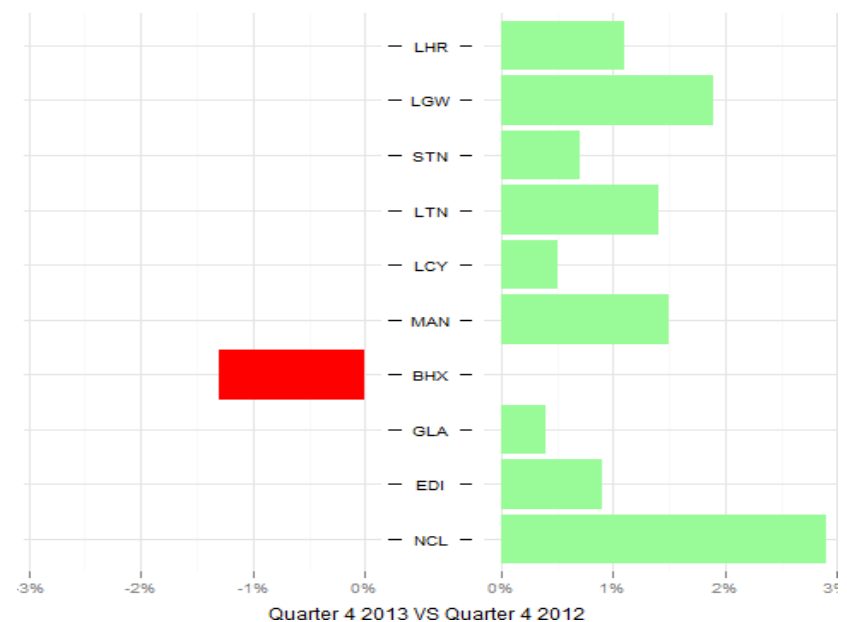
Matched flights (000s), % of flights on-time, average delay (mins)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2013		Q4 2012		Change (% points)	Q1 13 – Q4 13		Q1 12 – Q4 12		Change (% points)
	Flights (000s)	% on-time	Flights (000s)	% on-time		Flights (000s)	% on-time	Flights (000s)	% on-time	
London Airports	232.2	78.0%	225.8	76.7%	1.3%	966	78.2%	960	78.7%	-0.4%
- Heathrow	115.1	75.1%	113.6	74.0%	1.1%	466	75.6%	468	76.3%	-0.7%
- Gatwick	56.1	78.3%	53.5	76.4%	1.9%	244	76.8%	239	77.8%	-1.0%
- Stansted	29.1	81.8%	27.6	81.1%	0.7%	121	83.5%	121	83.3%	0.2%
- Luton	15.4	81.0%	15.2	79.6%	1.4%	67	81.8%	68	80.5%	1.3%
- London City	16.5	87.2%	15.8	86.6%	0.5%	68	88.7%	64	88.1%	0.5%
Regional Airports	104.7	82.8%	102.8	82.0%	0.8%	455	82.3%	453	81.5%	0.8%
- Manchester	36.3	80.2%	35.9	78.7%	1.5%	159	78.2%	158	77.2%	1.0%
- Birmingham	19.6	83.4%	18.8	84.7%	-1.3%	84	85.7%	83	84.0%	1.8%
- Glasgow	16.8	83.8%	16.9	83.5%	0.4%	72	83.3%	72	83.4%	-0.1%
- Edinburgh	22.8	85.1%	22.0	84.2%	0.9%	99	84.5%	98	84.0%	0.5%
- Newcastle	9.3	84.5%	9.3	81.6%	2.9%	41	83.9%	42	83.9%	0.0%
All Airports	336.9	79.5%	328.6	78.4%	1.1%	1,422	79.5%	1,413	79.6%	0.0%

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 2013, 79.5% of all measured flights were on time, which was up 1.1 percentage points compared to the same quarter last year. Compared to last year, the percentage of on-time flights increased across all the London airports and across all the regional airports but Birmingham.

Change in On-Time Performance (percentage points)



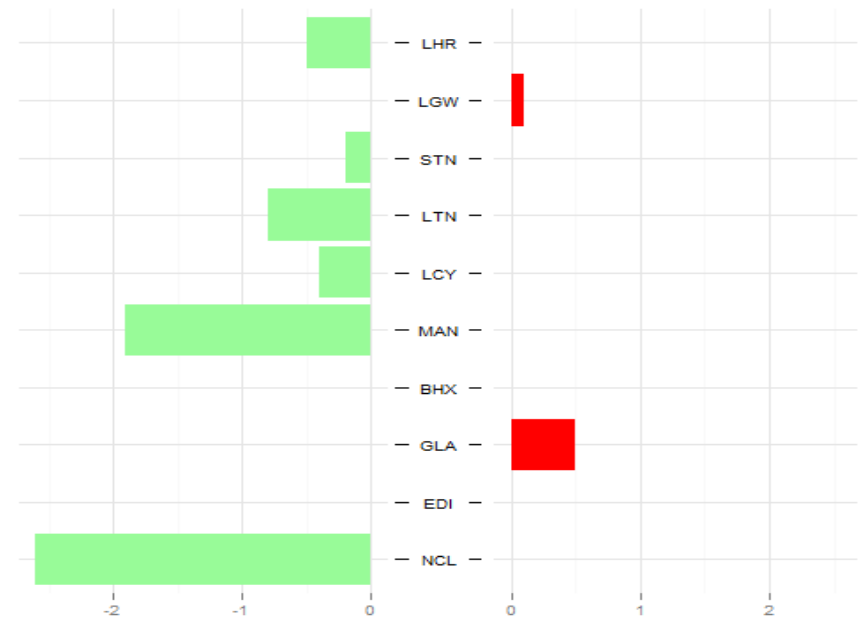
b. Average Delay

Matched flights (000s), % of flights on-time, average delay (mins)	CURRENT QUARTER					ROLLING YEAR				
	Q4 2013		Q4 2012			Q1 13 – Q4 13		Q1 12 – Q4 12		
	Flights (000s)	Avg. Delay (mins)	Flights (000s)	Avg. Delay (mins)	Increase Avg. delay (min)	Flights (000s)	Avg. Delay (mins)	Flights (000s)	Avg. Delay (mins)	Increase Avg. delay (min)
London Airports	232.2	12.9	225.8	13.2	- 0.3	966.41	12.5	959.97	12.3	0.2
- Heathrow	115.1	14.1	113.6	14.6	- 0.5	466.40	13.6	468.15	13.3	0.4
- Gatwick	56.1	13.5	53.5	13.3	0.1	243.51	13.9	239.16	13.3	0.6
- Stansted	29.1	10.6	27.6	10.8	- 0.2	121.40	9.5	120.64	9.4	0.1
- Luton	15.4	11.7	15.2	12.5	- 0.8	67.15	10.8	67.77	11.8	- 1.0
- London City	16.5	7.7	15.8	8.1	- 0.4	67.94	6.7	64.26	6.8	- 0.1
Regional Airports	104.7	10.3	102.8	11.1	- 0.8	455.14	11.0	452.62	11.7	- 0.7
- Manchester	36.3	11.2	35.9	13.0	- 1.9	159	13.0	158.38	14.4	- 1.4
- Birmingham	19.6	9.4	18.8	9.4	0.0	84	9.0	83.07	10.3	- 1.2
- Glasgow	16.8	11.0	16.9	10.5	0.5	72	11.0	71.64	10.8	0.2
- Edinburgh	22.8	9.4	22.0	9.5	0.0	99	9.4	97.63	9.5	- 0.1
- Newcastle	9.3	9.5	9.3	12.1	- 2.6	41	10.7	41.90	10.8	- 0.1
All Airports	336.9	12.1	328.6	12.6	- 0.5	1,422	12.0	1,412.59	12.1	- 0.1

Average delay per flight across all the airports was of 12.1 minutes for Q4 2013. This is a decrease of 0.5 minute compared to the same quarter last year.

Compared to the same quarter last year, the average delay per flight increased at Gatwick and Glasgow but decreased across all the others monitored airports.

Change in Average Delay (min) - Quarter 4 2013 VS Quarter 4 2012



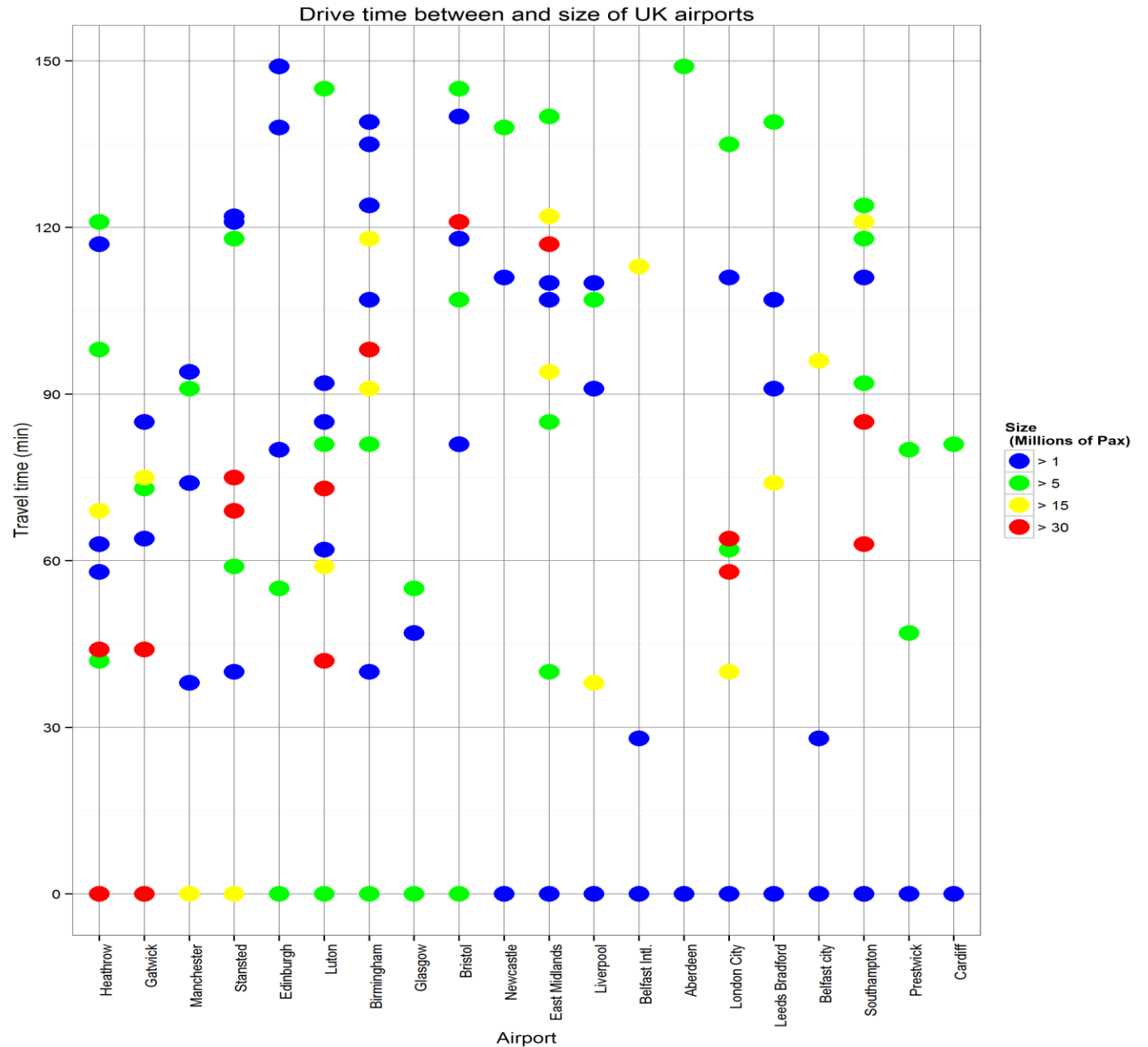
Did you know?

This chart shows the number and the size of airports within two hours and a half hours drive time of UK airports* serving more than a million passengers during 2013.

It shows that most of the largest UK airports have several airports within 90 minutes drive-time and that most have at least another airport within an hour. This is particularly true for airports located in more densely populated regions. Newcastle and Aberdeen airports are the only two airports without any other airport handling more than a million passengers within 90 minutes.

This suggests that UK airport passengers have a good degree of airport choice, although travel time to an airport is only one of the measures of air connectivity. Availability of destinations, frequency of service, type of airline service and service quality are also likely to be important factors in determining passengers' choice of airport.

* In the context of Belfast's airports, we also show the drive time to Dublin airport (not a UK airport) which handled 20 million passengers in 2013.



Source: CAA Airport Statistics, Dublin Airport Website (passenger numbers) and Google Maps (drive times)

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 4

- Other Balkan Region: Albania, Croatia, Bulgaria, Macedonia.
- Eastern Europe: Austria, Belarus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Moldova, Romania, Russia, Slovakia, Slovenia, Ukraine, Yugoslavia.

7. 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.