

Aviation Trends

Quarter 3 2014



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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.

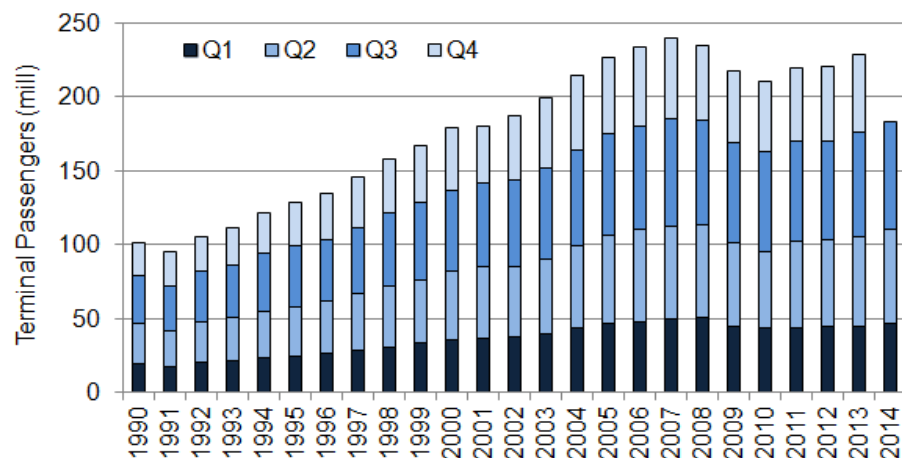
The Aviation Trends series is available at www.caa.co.uk/aviationtrends, part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications. Please note that historic numbers may be subject to minor change as the result of prior period adjustments.¹ Due to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

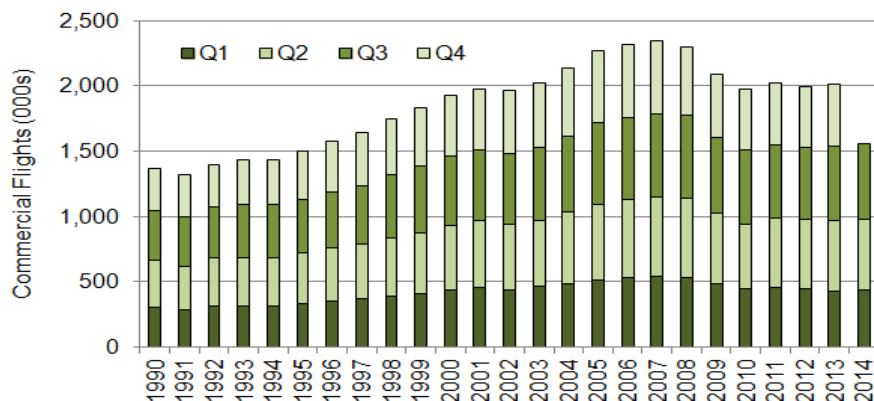
¹ Also, in editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. These islands are not formally part of the UK, and as we wish to present only the trends at UK airports, their figures are now excluded from the UK reporting airports,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

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

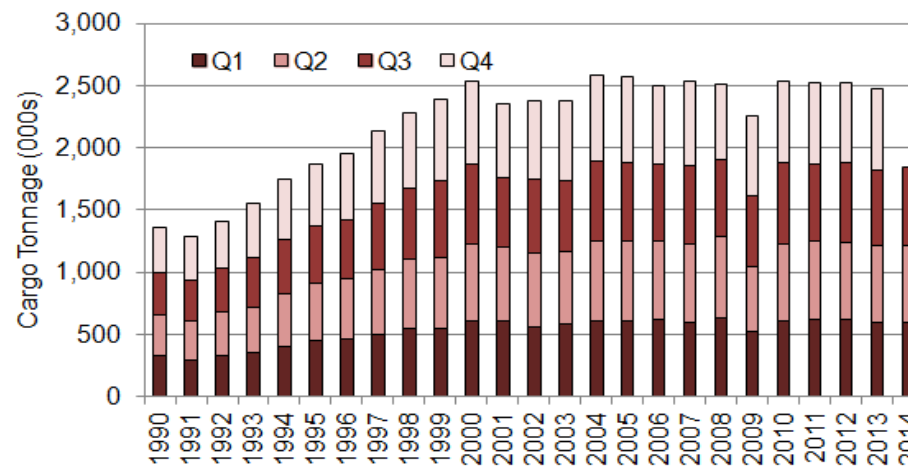
a. Terminal passengers



b. Commercial flights



c. Cargo tonnage



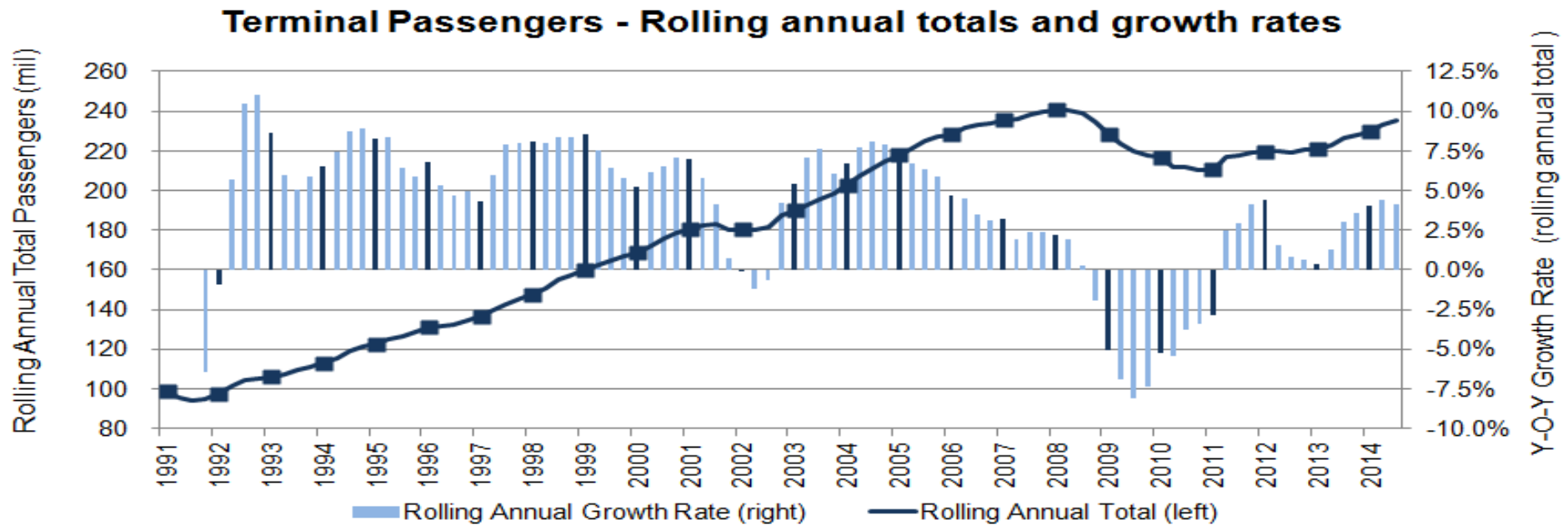
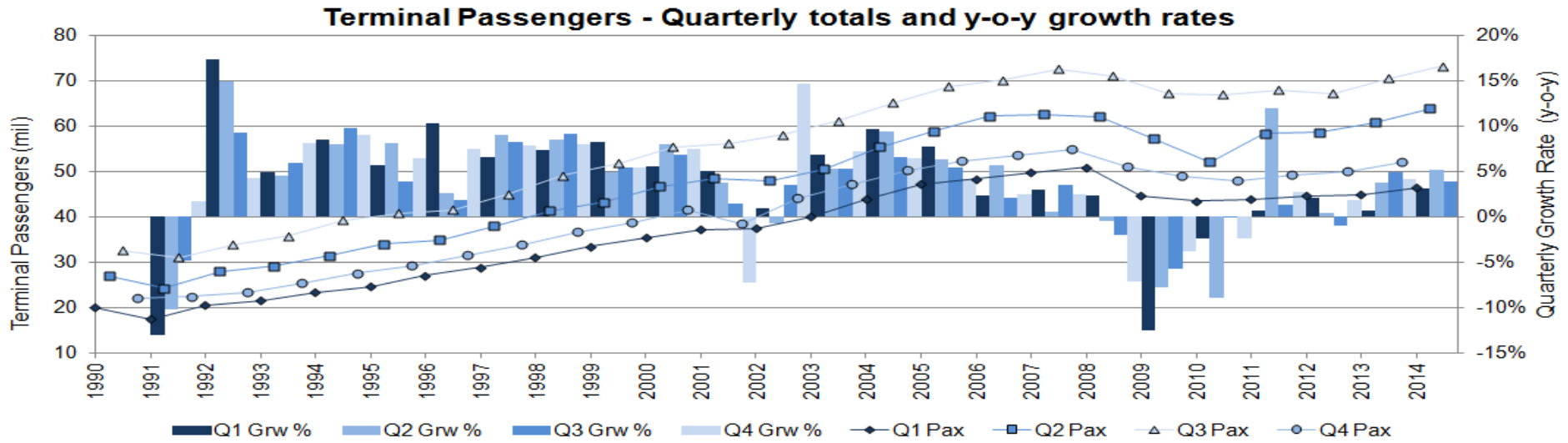
The three time-series charts on this page show both seasonal and annual trends in UK aviation activity in terms of terminal passengers, commercial flights and cargo tonnage.

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.

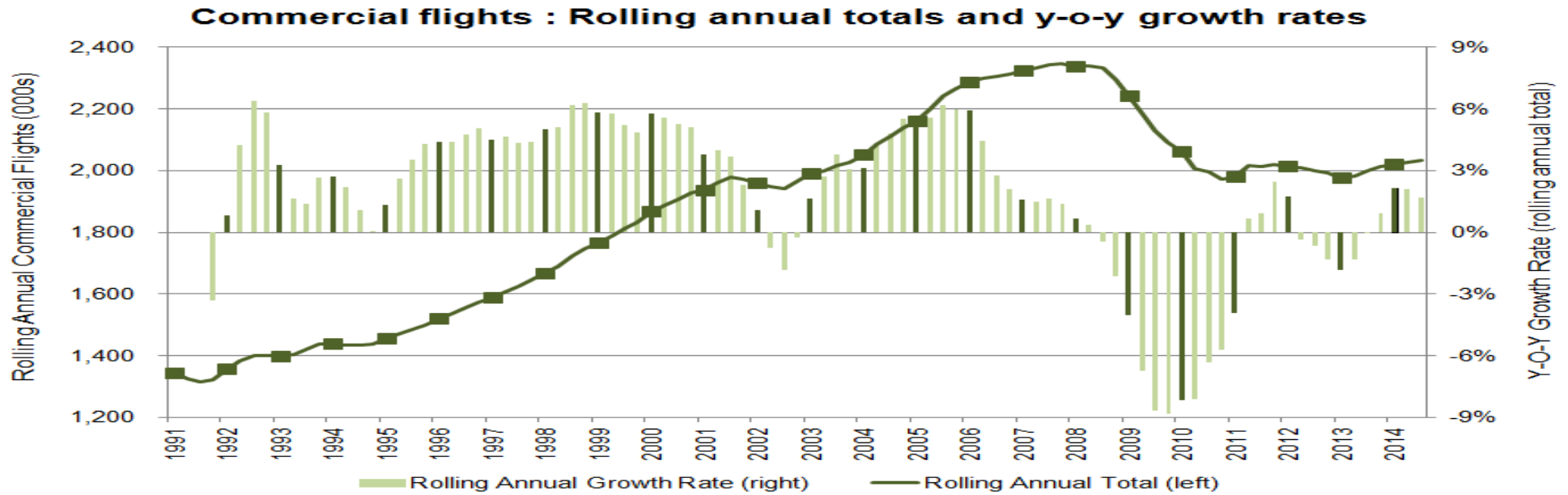
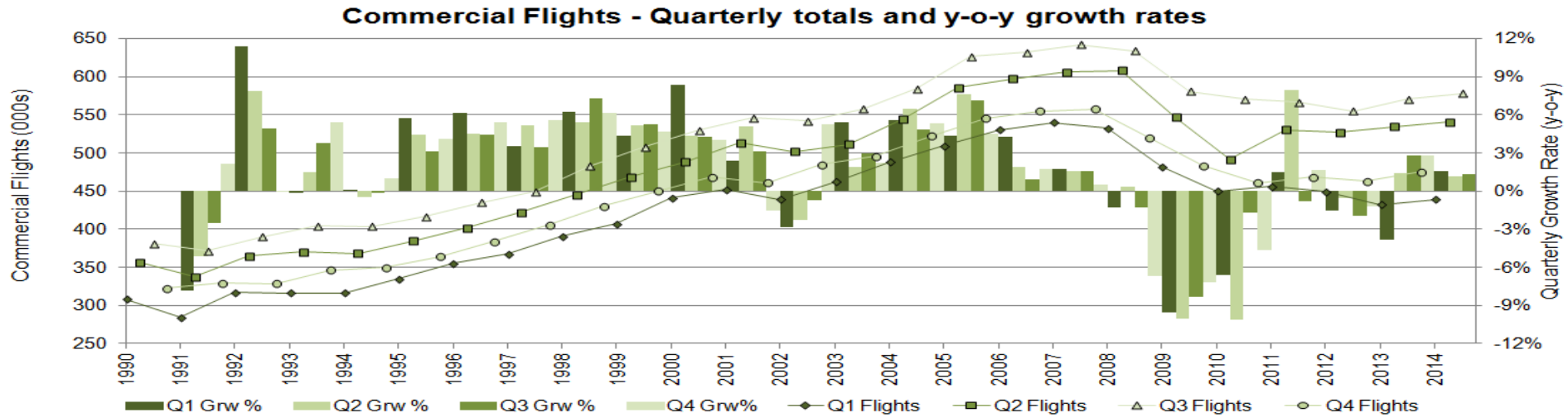
In Q3 2014, UK airports handled 73.2 million terminal passengers, 578 thousand commercial flights, and 622 thousand tonnes of cargo, increases of 3.8%, 1.3% and 2.2% respectively, compared to the same quarter last year².

² These figures include traffic to and from North Sea oil rigs, which are excluded from the detailed tables in Parts 2 – 6.

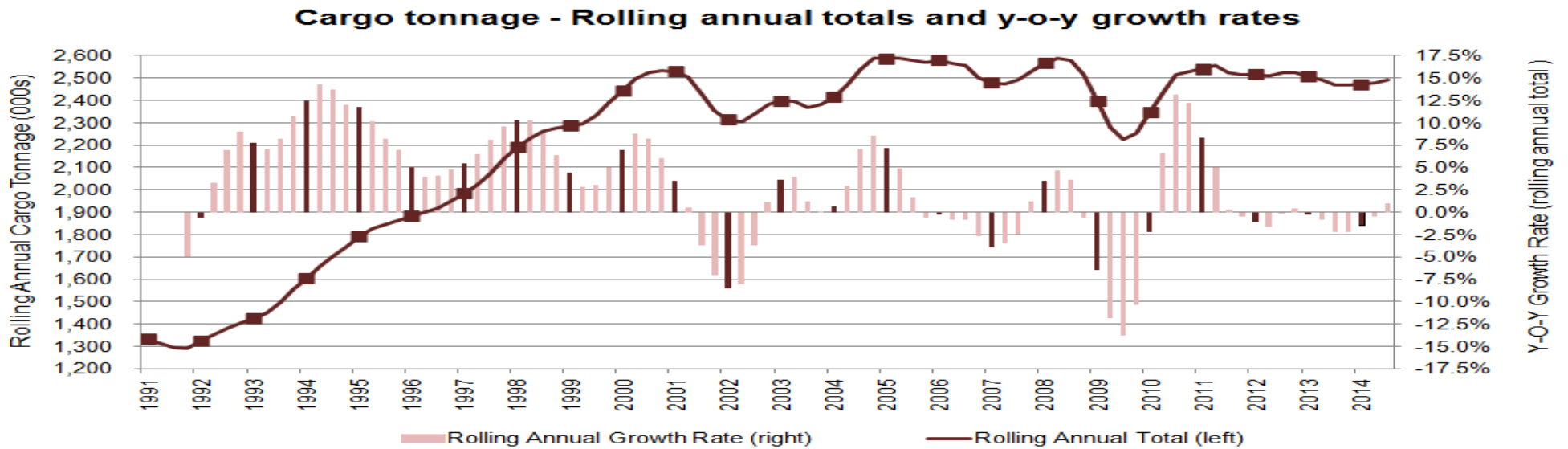
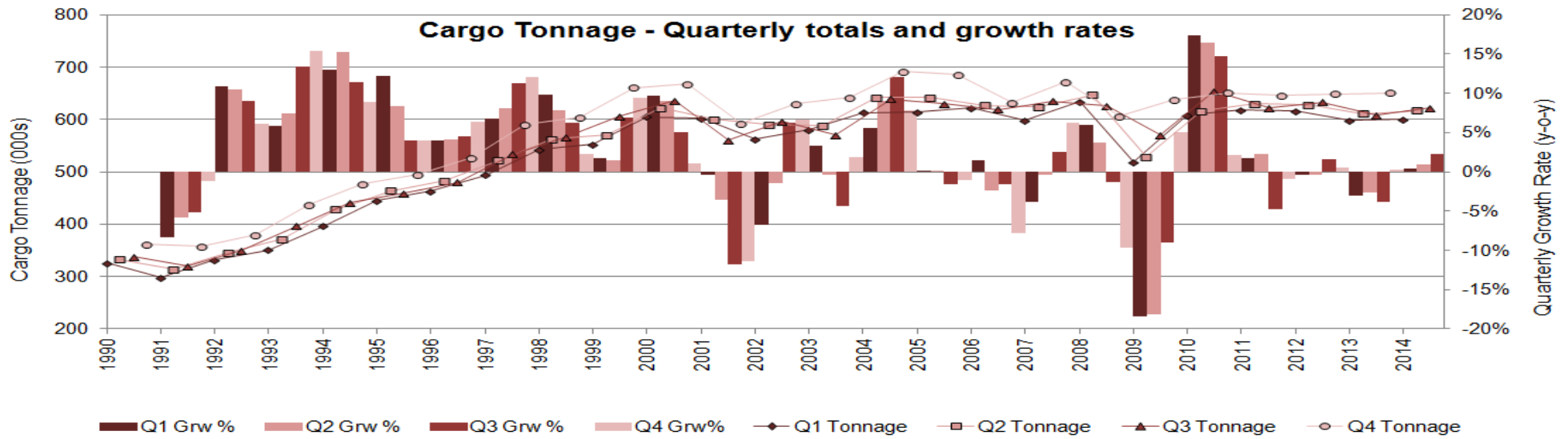
a. Terminal passengers



b. Commercial flights



c. Cargo tonnage



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

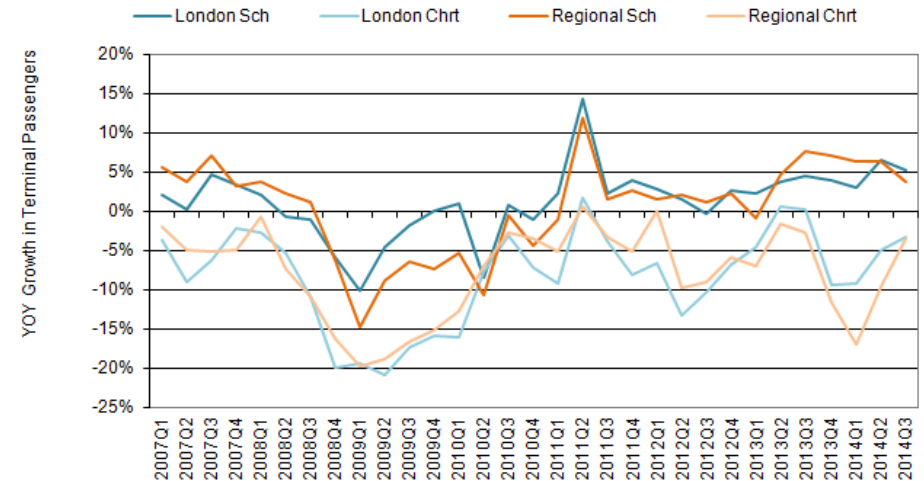
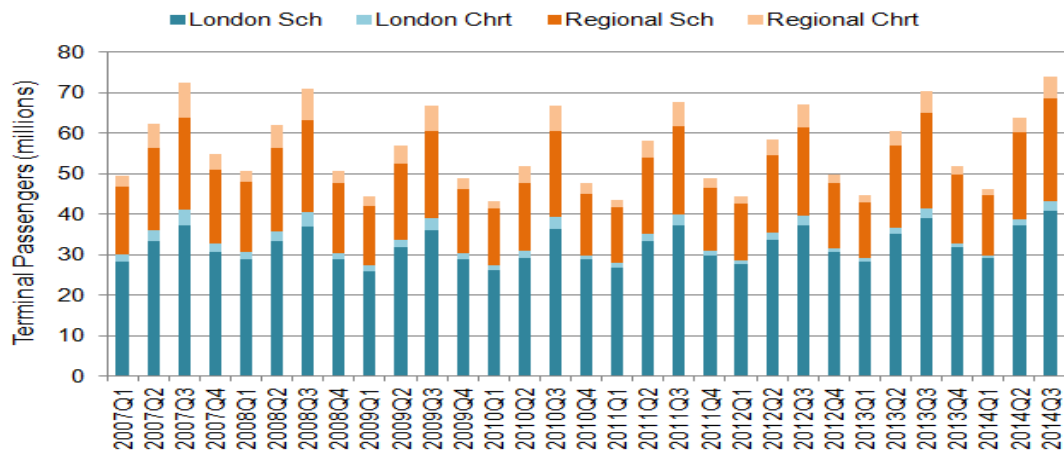
Pax (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2014		Q3 2013			Q4 13 - Q3 14		Q4 12 - Q3 13		
	Pax (m)	% of total	Pax (m)	% of total	% chg	Pax (m)	% of total	Pax (m)	% of total	% chg
London Airports	43.3	59%	41.3	59%	4.8%	144.6	62%	138.5	62%	4.4%
- Scheduled	40.9	56%	38.8	55%	5.3%	139.0	59%	132.5	59%	4.9%
- Charter	2.4	3%	2.5	4%	-3.3%	5.6	2%	6.0	3%	-5.6%
Regional Airports	29.6	41%	29.0	41%	2.4%	90.0	38%	86.9	39%	3.6%
- Scheduled	24.4	34%	23.6	34%	3.7%	77.9	33%	73.6	33%	5.7%
- Charter	5.2	7%	5.4	8%	-3.5%	12.1	5%	13.2	6%	-8.4%
All Airports	72.9	100%	70.3	100%	3.8%	234.6	100%	225.4	100%	4.1%
- Scheduled	65.3	90%	62.4	89%	4.7%	216.8	92%	206.2	92%	5.2%
- Charter	7.6	10%	7.9	11%	-3.4%	17.7	8%	19.2	9%	-7.5%

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 graphs 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 Q3 2014, London airports handled 4.8% more passengers, and regional airports 2.4% more than in the same quarter last year.

Across all UK airports, the number of passengers on scheduled flights was up 4.7%, but down 3.4% on charter flights compared with the same quarter in 2013.

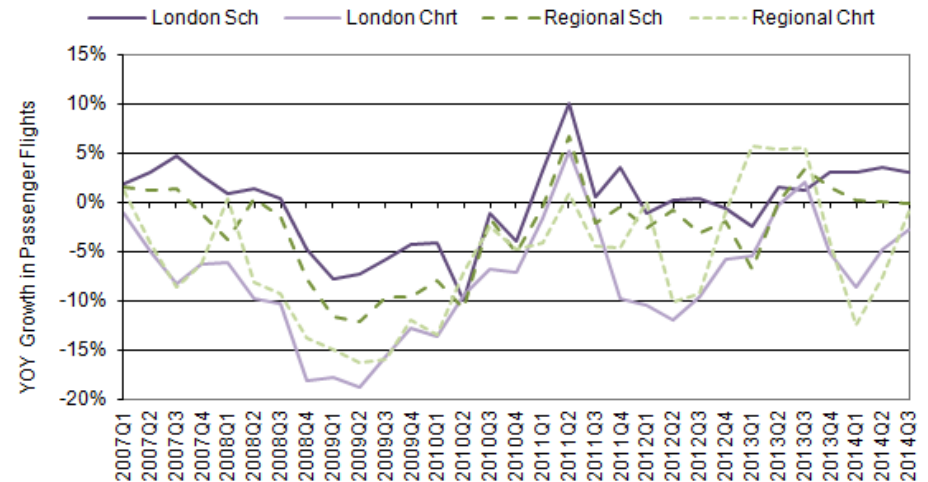
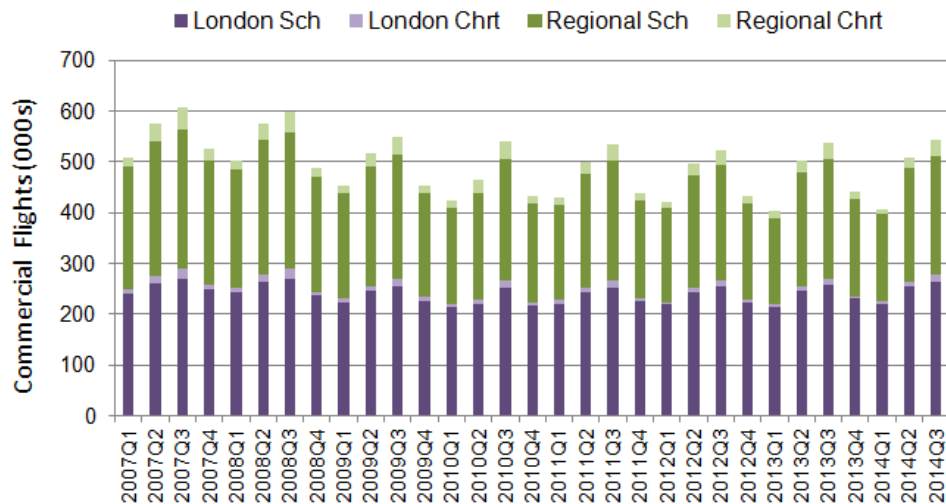


3. Passenger flights to and from UK airports see note 5 on p.17

The figures in this table are for commercial passenger flights and thus exclude air freighter flights (those carrying cargo only). Compared to Q3 2013, the number of total passenger flights at all UK airports increased by 1.2% in Q3 2014. Whilst charter traffic continued to decline: there were 1.5% more scheduled flights but 1.4% less charter flights.

On a rolling year basis, the number of scheduled flights was up by 1.8% and the number of charter flights was down by 5.0%. There were 2.7% more flights at the London airports but 0.2% less flights at regional airports in Q3 2014 than in Q3 2013. On a rolling year basis, the number of flights was up by 2.9% at the London airports and down by 0.2% at the regional airports.

Flights	CURRENT QUARTER					ROLLING YEAR				
	Q3 2014		Q3 2013			Q4 13 - Q3 14		Q4 12 - Q3 13		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
London Airports	277.5	51%	270.2	50%	2.7%	1,001.9	53%	973.8	52%	2.9%
- Scheduled	265.0	49%	257.3	48%	3.0%	971.0	51%	941.3	50%	3.1%
- Charter	12.5	2%	12.8	2%	-2.7%	30.9	2%	32.4	2%	-4.6%
Regional Airports	265.4	49%	266.0	50%	-0.2%	897.5	47%	898.9	48%	-0.2%
- Scheduled	234.7	43%	235.1	44%	-0.1%	820.3	43%	817.5	44%	0.3%
- Charter	30.7	6%	30.9	6%	-0.9%	77.2	4%	81.4	4%	-5.2%
All Airports	542.9	100%	536.2	100%	1.2%	1,899.4	100%	1,872.6	100%	1.4%
- Scheduled	499.7	92%	492.4	92%	1.5%	1,791.3	94%	1,758.8	94%	1.8%
- Charter	43.2	8%	43.8	8%	-1.4%	108.1	6%	113.8	6%	-5.0%

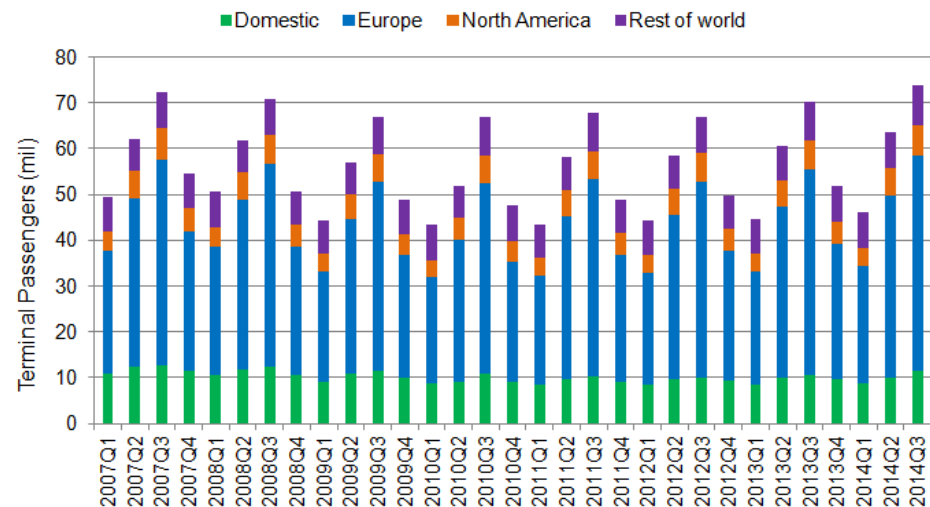


4. Terminal passengers at UK airports by origin/destination see note 5 on p.17

Pax (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2014		Q3 2013			Q4 13 - Q3 14		Q4 12 - Q3 13		
	pax (mil)	% of total	pax (mil)	% of total	% chg	pax (mil)	% of total	pax (mil)	% of total	% chg
Domestic	10.5	14%	10.6	15%	-0.7%	38.7	17%	38.0	17%	1.8%
- Scheduled	10.4	14%	10.5	15%	-0.8%	38.2	16%	37.6	17%	1.7%
- Charter	0.1	0%	0.1	0%	7.2%	0.5	0%	0.5	0%	3.6%
Europe	47.0	64%	44.7	64%	5.1%	142.3	61%	135.2	60%	5.2%
- Scheduled	40.5	56%	38.0	54%	6.6%	128.2	55%	120.0	53%	6.8%
- Charter	6.5	9%	6.7	10%	-2.9%	14.1	6%	15.2	7%	-7.1%
North America	6.5	9%	6.4	9%	2.7%	21.2	9%	20.8	9%	2.2%
- Scheduled	6.4	9%	6.3	9%	2.6%	21.0	9%	20.5	9%	2.5%
- Charter	0.1	0%	0.1	0%	5.3%	0.2	0%	0.3	0%	-16.2%
Rest of World	8.9	12%	8.6	12%	3.3%	32.3	14%	31.3	14%	3.2%
- Scheduled	8.0	11%	7.7	11%	4.9%	29.4	13%	28.1	12%	4.8%
- Charter	0.8	1%	0.9	1%	-9.8%	2.9	1%	3.3	1%	-10.9%
Total	72.9	100%	70.3	100%	3.8%	234.6	100%	225.4	100%	4.1%
- Scheduled	65.3	90%	62.4	89%	4.7%	216.8	92%	206.2	91%	5.2%
- Charter	7.6	10%	7.9	11%	-3.4%	17.7	8%	19.2	9%	-7.6%

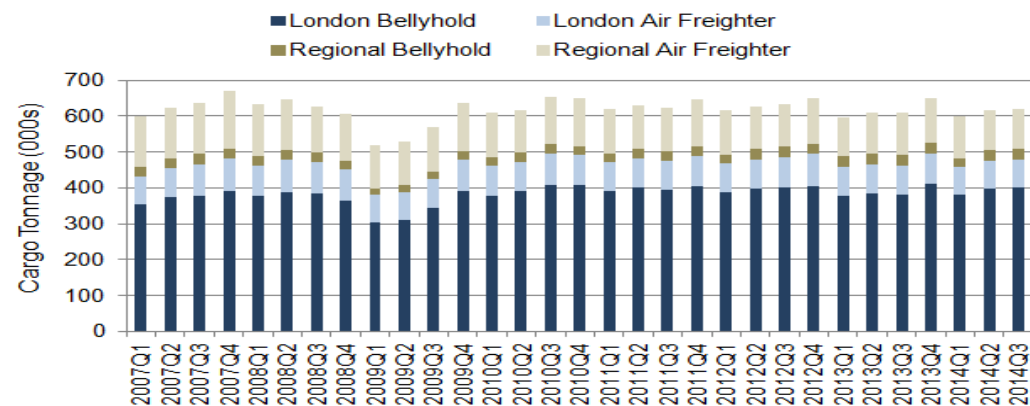
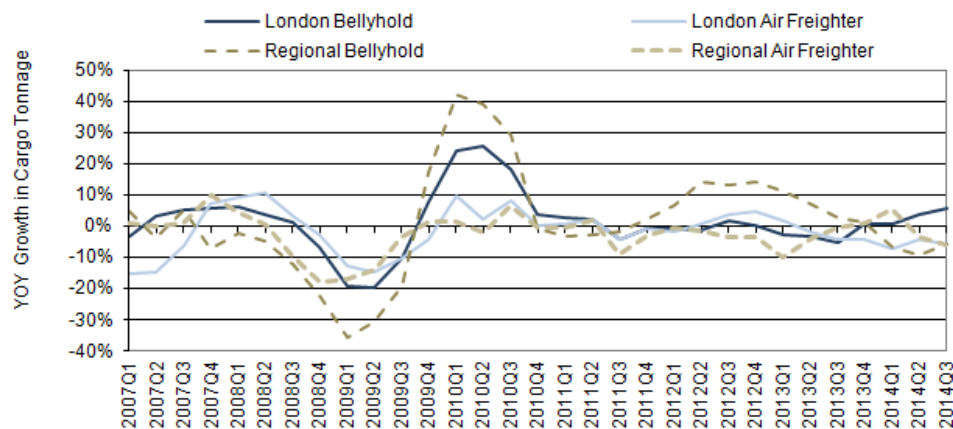
Compared to the same quarter last year, there have been increases in the number of passengers travelling to and from Europe (5.1%), North America (2.7%) and Rest of the World (3.3%). The number of passengers travelling to and from Domestic destinations decreased slightly (0.7%).

On a rolling year basis, the total number of passengers was up by 4.1%. This was made up of an increase of 5.2%, 2.2% and 3.2% of passengers travelling to and from Europe, North America and Rest of the World respectively, and a 1.8% increase in domestic traffic. Overall, passengers on charter flights have declined by 3.4% in Q3 2014 (compared to Q3 2013) and by 7.6% on a rolling year basis.



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

Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2014		Q3 2013			Q4 13 - Q3 14		Q4 12 – Q3 13		
	Tonnes (000s)	% of total	Tonnes (000s)	% of total	% chg	Tonnes (000s)	% of total	Tonnes (000s)	% of total	% chg
Cargo on cargo only flights	186.4	30%	197.7	32%	-6.1%	779.9	31%	800.2	32%	-2.6%
London	77.3	13%	82.0	13%	-6.0%	316.0	13%	333.2	14%	-5.4%
Regional	109.1	18%	115.8	19%	-6.1%	463.9	19%	467.0	19%	-0.7%
Bellyhold cargo	431.8	70%	411.0	67.5%	4.8%	1,703.2	69%	1,665.8	68%	2.2%
London	402.5	65%	380.1	62.4%	5.6%	1,591.5	64%	1,548.2	63%	2.7%
Regional	29.2	5%	30.9	5.1%	-5.8%	111.8	5%	117.6	5%	-5.2%
Total cargo	618.2	100%	608.7	100%	1.5%	2,483.1	100%	2,465.9	100%	0.7%
London	479.8	78%	462.1	76%	3.7%	1,907.5	77%	1,881.4	76%	1.4%
Regional	138.3	22%	146.7	24%	-6.1%	575.7	23%	584.5	24%	-1.5%

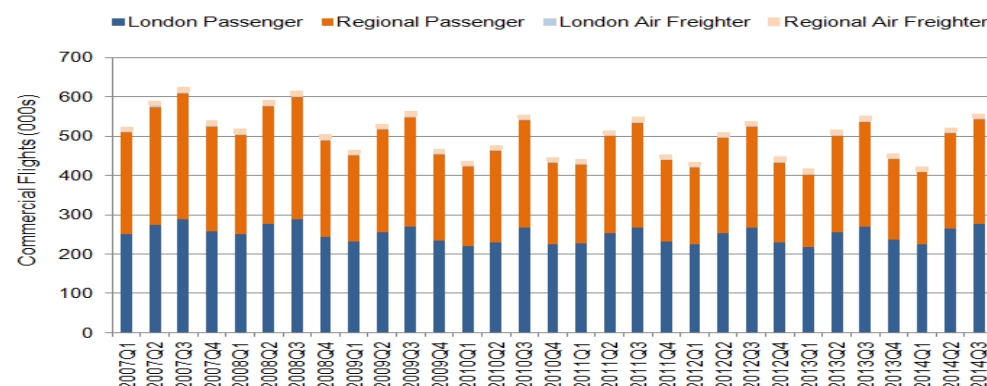


Air cargo – freight and mail – is transported in and out of the UK on air freighters and in the bellyhold of passenger aircraft.

Compared to Q3 2014, total cargo tonnage at all UK airports was up 1.5% in Q3 2014. This consisted of an increase of 3.7% at London airports and a decrease of 6.1% at Regional airports. Whilst air freighter tonnage decreased by 6.1%, bellyhold cargo tonnage increased by 4.8% compared with the same quarter last year. On a rolling year basis, total cargo tonnage handled at UK airports increased by 0.7% compared with the year before, driven by 2.6% reduction in air freighter cargo tonnage, and an increase of 2.2% in bellyhold cargo.

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

Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2014		Q3 2013			Q4 13 - Q3 14		Q4 12 - Q3 13		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
Air freighter	13.3	2%	13.5	2%	-1.4%	53.3	3%	53.6	3%	-0.5%
London	3.3	1%	3.5	1%	-5.7%	13.2	1%	13.9	1%	-4.9%
Regional	10.0	2%	10.0	2%	0.0%	40.1	2%	39.7	2%	1.0%
Passenger flights	542.9	98%	536.2	98%	1.2%	1,899.4	97%	1,872.6	97%	1.4%
London	277.5	50%	270.2	49%	2.6%	1,001.9	51%	973.8	51%	2.8%
Regional	265.4	48%	266.0	48%	-0.2%	897.5	46%	898.9	47%	-0.2%
Total flights	556.2	100%	549.7	100%	1.2%	1,952.7	100%	1,926.2	100%	1.4%
London	280.8	50%	273.7	50%	2.5%	1,015.1	52%	987.6	51%	2.7%
Regional	275.4	50%	276.0	50%	-0.2%	937.6	48%	938.5	49%	-0.1%



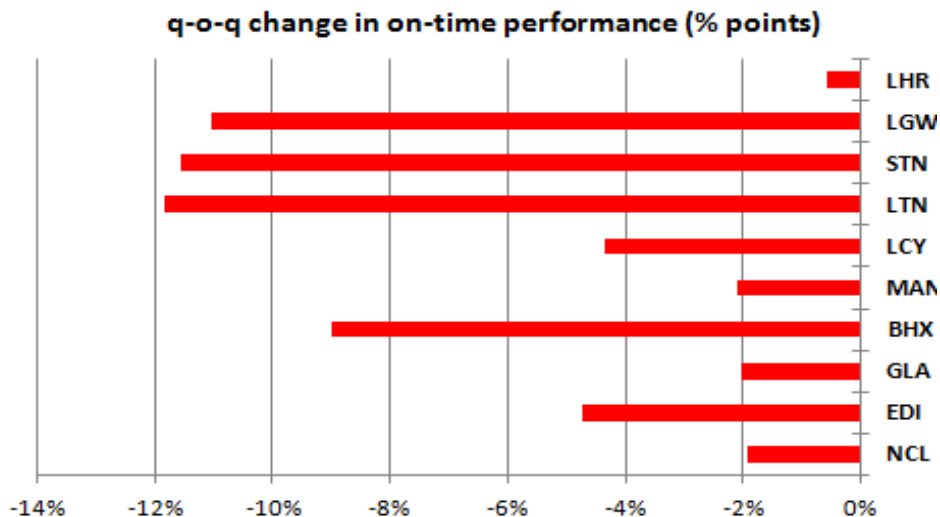
The number of commercial flights at reporting UK airports is a measure of commercial aviation activity in the UK. It includes both passenger and cargo flights, but excludes military flights, general aviation, and aircraft that pass through UK airspace without landing. In Q3 2014, the total number of commercial flights in the UK was up 1.2% compared to Q3 2013 as a result of a 1.2% increase in the number of passenger flights and a 1.4% reduction in the number of freighter flights.

The London airports saw an overall increase of 2.5% in total number of flights whereas the regional airports experienced a reduction of 0.2%. On a rolling year basis, the total number of flights was up 1.4% compared with the year before.

7. Punctuality of passenger flights to and from UK airports see note 6 on p.17

a. On-time performance

Matched flights (000s), % of flights on-time	CURRENT QUARTER					ROLLING YEAR				
	Q3 2014		Q3 2013		Change (% points)	Q4 13 - Q3 14		Q4 12 - Q3 13		Change (% points)
	Flights (000s)	% on-time	Flights (000s)	% on-time		Flights (000s)	% on-time	Flights (000s)	% on-time	
London Airports	273.2	72.4%	265.9	78.4%	-6.0%	987.1	77.4%	960.0	77.9%	-0.5%
- Heathrow	121.9	75.8%	122.1	76.4%	-0.6%	467.1	77.4%	465.0	75.3%	2.1%
- Gatwick	76.2	63.8%	73.4	74.9%	-11.0%	253.0	73.5%	241.0	76.4%	-2.9%
- Stansted	36.3	73.8%	33.1	85.3%	-11.6%	128.9	79.7%	119.9	83.4%	-3.6%
- Luton	21.5	71.5%	19.7	83.3%	-11.8%	70.6	77.2%	66.9	81.5%	-4.3%
- London City	17.2	84.9%	17.6	89.2%	-4.4%	67.5	88.2%	67.3	88.6%	-0.4%
Regional Airports	136.9	78.1%	135.0	82.0%	-3.9%	458.3	81.6%	453.2	82.1%	-0.5%
- Manchester	48.9	75.3%	47.6	77.4%	-2.1%	160.9	78.7%	158.9	77.9%	0.8%
- Birmingham	26.5	79.0%	25.3	88.0%	-9.0%	87.4	82.7%	83.1	86.1%	-3.4%
- Glasgow	21.3	80.2%	20.8	82.3%	-2.0%	72.4	83.0%	72.0	83.2%	-0.2%
- Edinburgh	27.6	77.9%	28.7	82.6%	-4.7%	96.3	82.8%	97.8	84.3%	-1.5%
- Newcastle	12.6	83.7%	12.6	85.6%	-1.9%	41.3	84.9%	41.4	83.2%	1.7%
All Airports	410.0	74.3%	400.9	79.6%	-5.3%	1,445.4	78.7%	1,413.3	79.3%	-0.5%



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.

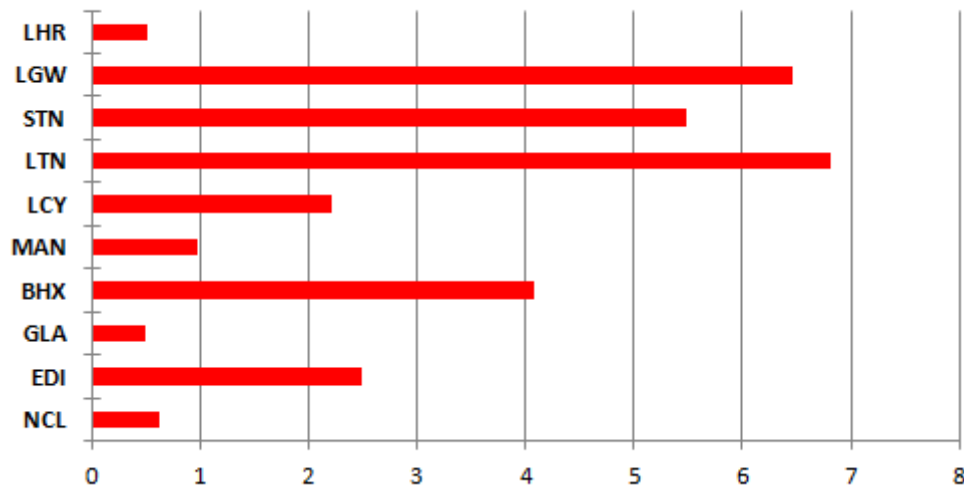
The on-time performance is defined as the proportion of flights arriving or departing early or up to 15 minutes late. It is calculated from the scheduled on-stand time, the reported runway time and the expected time an aircraft takes to travel between a stand and the runway.

In Q3 2014, 74.3% of all measured flights (both scheduled and charter) were on time, which was down by 5.3 percentage points compared to the same quarter last year. On a rolling year basis, the percentage of on-time flights decreased by 0.5 percentage points across the ten London and regional airports.

b. Average Delay

Matched flights (000s), Average Delay (min)	CURRENT QUARTER					ROLLING YEAR				
	Q3 2014		Q3 2013		Change in avg. delay (min)	Q4 13 - Q3 14		Q4 12 - Q3 13		Change in avg. delay (min)
	Flights (000s)	Avg. Delay (min)	Flights (000s)	Avg. Delay (min)		Flights (000s)	Avg. Delay (min)	Flights (000s)	Avg. Delay (min)	
London Airports	273.2	15.6	265.9	12.2	3.4	987.1	13.0	960.0	12.6	0.4
- Heathrow	121.9	13.7	122.1	13.2	0.5	467.1	12.9	465.0	13.8	-0.8
- Gatwick	76.2	21.0	73.4	14.5	6.5	253.0	15.7	241.0	13.8	1.8
- Stansted	36.3	13.8	33.1	8.3	5.5	128.9	11.1	119.9	9.5	1.6
- Luton	21.5	16.4	19.7	9.6	6.8	70.6	13.2	66.9	11.0	2.2
- London City	17.2	8.7	17.6	6.5	2.2	67.5	7.2	67.3	6.8	0.4
Regional Airports	136.9	12.8	135.0	11.0	1.8	458.3	11.0	453.2	11.2	-0.2
- Manchester	48.9	14.4	47.6	13.5	1.0	160.9	12.3	158.9	13.5	-1.1
- Birmingham	26.5	11.8	25.3	7.8	4.1	87.4	10.3	83.1	9.0	1.3
- Glasgow	21.3	12.0	20.8	11.5	0.5	72.4	10.6	72.0	10.8	-0.2
- Edinburgh	27.6	12.6	28.7	10.1	2.5	96.3	10.2	97.8	9.4	0.8
- Newcastle	12.6	10.0	12.6	9.4	0.6	41.3	9.5	41.4	11.3	-1.7
All Airports	410.0	14.7	400.9	11.8	2.9	1,445.4	12.4	1,413.3	12.1	0.2

q-o-q change in average delay (mins)



Average delay per flight across the ten airports was 14.7 minutes for Q3 2014. This represented an increase of 2.9 minutes against the same quarter last year. All reporting airports saw increases in the average delay.

On a rolling year basis, the overall average delay per flight increased by 0.2 minutes compared with the year before.

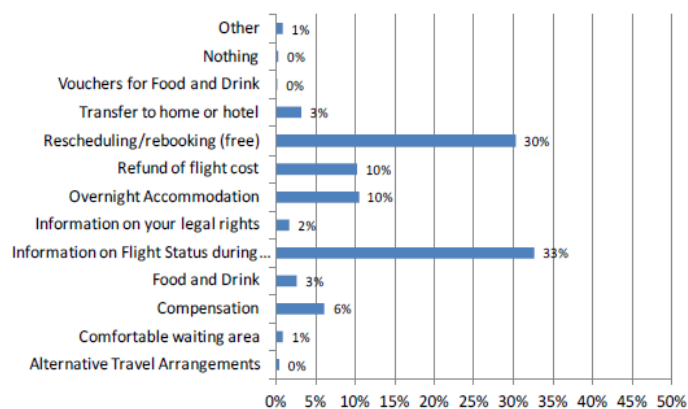
8. Did you know?

CAA disruption research

The CAA has recently published the findings results of consumer research carried out at airports in the first half of 2014 (www.caa.co.uk/CAP1258). The objective of the research was to better understand consumers' experiences of disruption to their journeys, and to help inform our approach to enforcing Regulation (EC) 261/2004, known as the Denied Boarding Regulations (DBRs). Passengers whose flights have been disrupted are entitled to certain assistance from their airline under the DBRs. Depending on the extent of disruption, passengers should be provided with meals and refreshments, hotel accommodation (and transport between the airport and hotel) and the means to communicate (e.g. telephone calls, emails, etc.). Airlines must also provide passengers with information about their right to assistance, as well as their other rights under the DBRs.

The CAA passenger survey is a large-scale survey of departing passengers at UK airports. In 2014, the CAA interviewed around 230,000 passengers at Heathrow, Gatwick, Stansted, Manchester, Luton, Birmingham, East Midlands, Leeds Bradford, Liverpool and Doncaster Sheffield. In addition to the main questions asked by the survey, we are able to include ad-hoc questions on a particular topic of interest. In this instance, we added a set of questions to understand passengers' experiences of flight disruption. The disruption add-on interviewed 2,553 passengers at Heathrow, Gatwick, Manchester, Luton and Leeds Bradford airports.

Figure 16: What do you think would be the most important to you if you were on a flight which was over 3 hours late? (Q13a)



Notes: All Passengers interviewed were asked this question; not only those that were disrupted. Only one answer was allowed. Number of respondents: 2,467.

- The 2,553 passengers surveyed were asked, “Have you had a flight leaving a UK airport delayed or disrupted in the last 3 years?” – almost 30 per cent replied that they had - of these nearly 75% were delays, and 20% cancellations.
- When passengers were asked what they considered would be most important in times of disruption, as Figure 16 from the report shows, information on flight status during the disruption and free rescheduling/rebooking of flights were the top two things chosen from the list provided.

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, 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.