

Aviation Trends

Quarter 2 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; this time we look at how much, despite significant growth in flight and passenger numbers at Heathrow, the noise contour area around the airport has reduced since the early 1970s given the improvement of aircraft performance and engine design.

In this edition of Aviation Trends, we show the number of passengers by journey purpose at UK airports surveyed by the CAA during 2013, in advance of the publication of the CAA Passenger Survey 2013 report shortly.

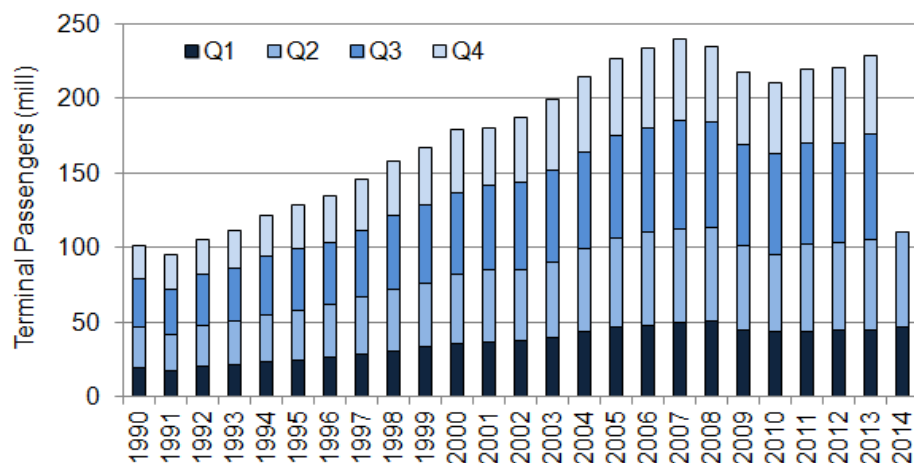
The Aviation Trends series is available at www.caa.co.uk/aviationtrends, part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications. Please note that historic numbers may be subject to minor change as the result of prior period adjustments.¹ Due to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

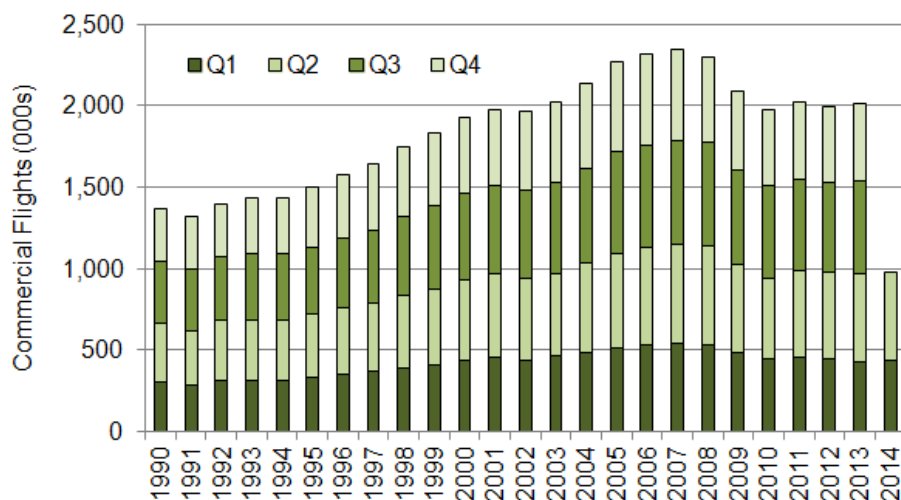
¹ Also, in editions of Aviation Trends prior to quarter 4 2008, all figures included activity at Channel Islands and Isle of Man airports. These islands are not formally part of the UK, and as we wish to present only the trends at UK airports, their figures are now excluded.

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

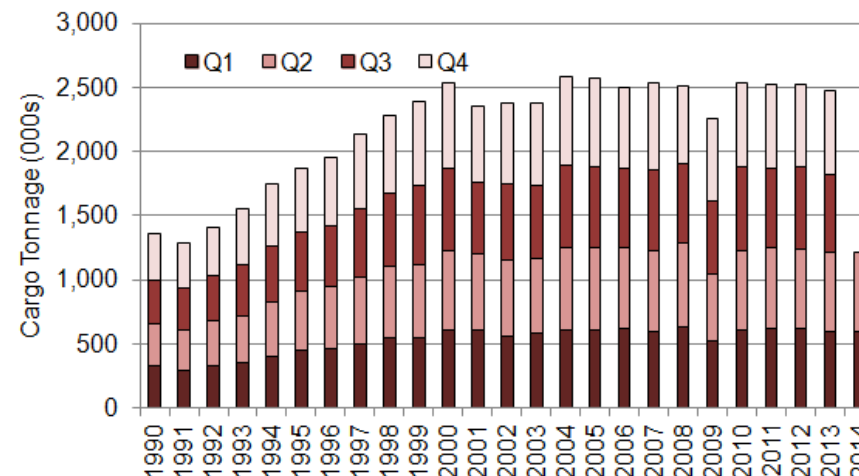
a. Terminal passengers



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.

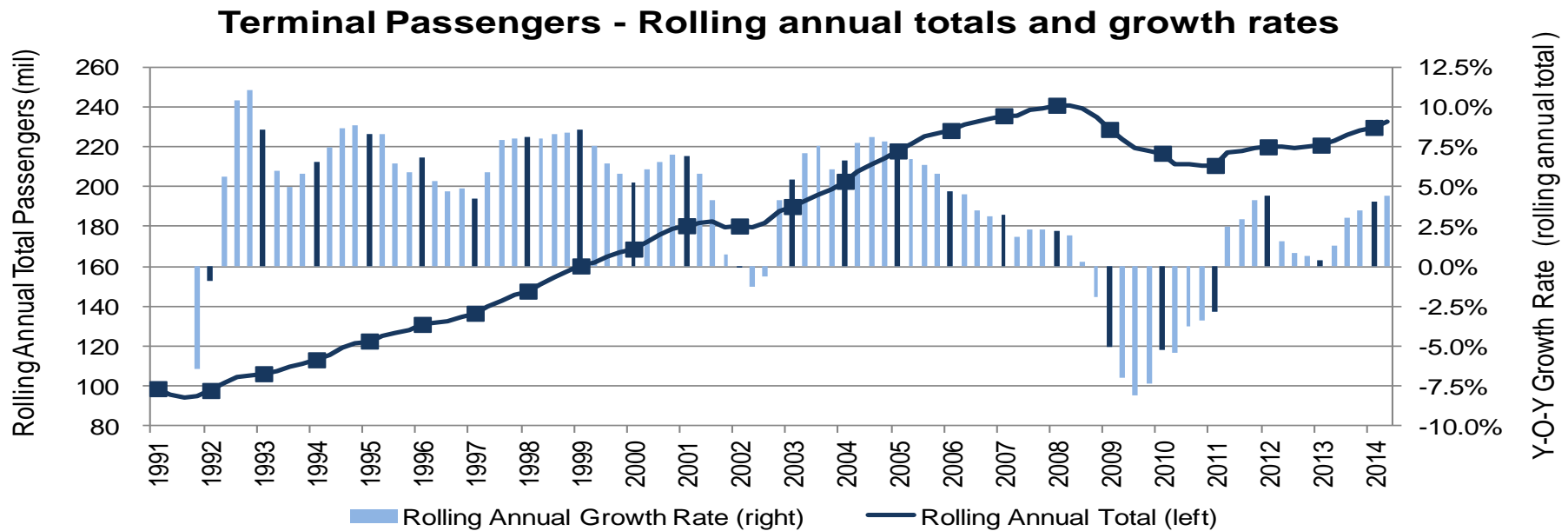
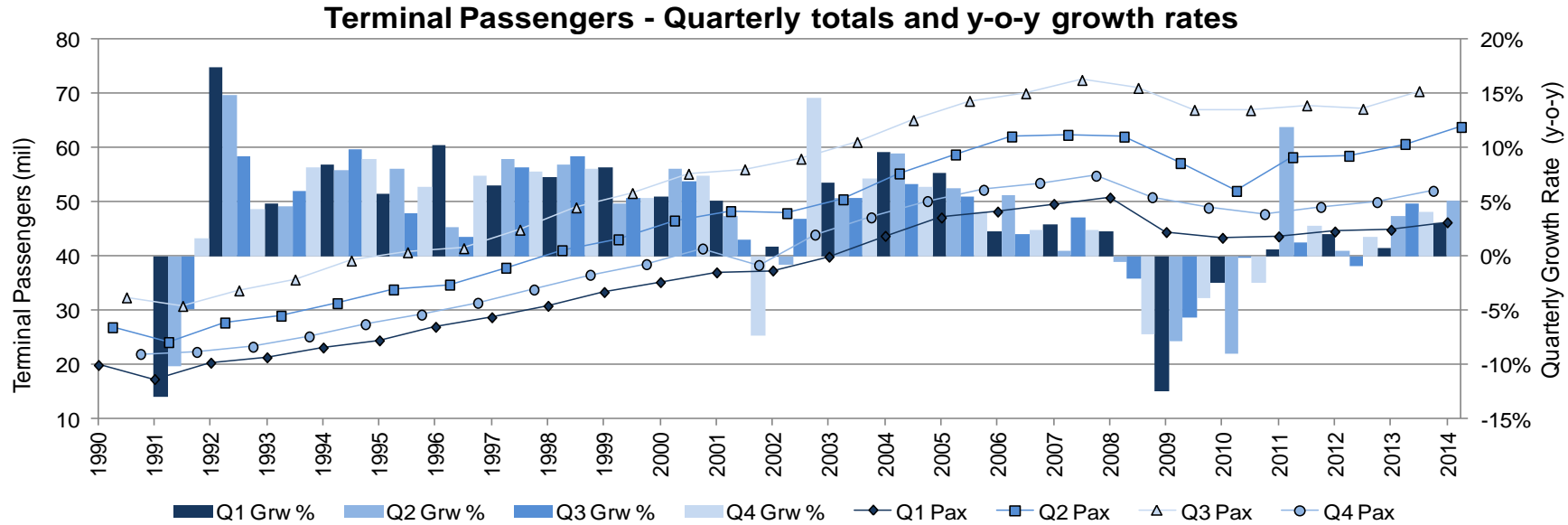
On pages 4 to 6, the top charts show traffic volume in each quarter (left axis), and the corresponding year-on-year quarterly growth rates (right axis).

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 Q2 2014, UK airports handled 63.9 million terminal passengers (an increase of 5.2%), 541 thousand commercial flights (an increase of 1.2%), and 617 thousand tonnes of cargo (an increase of 1.0%) compared to the same quarter last year.²

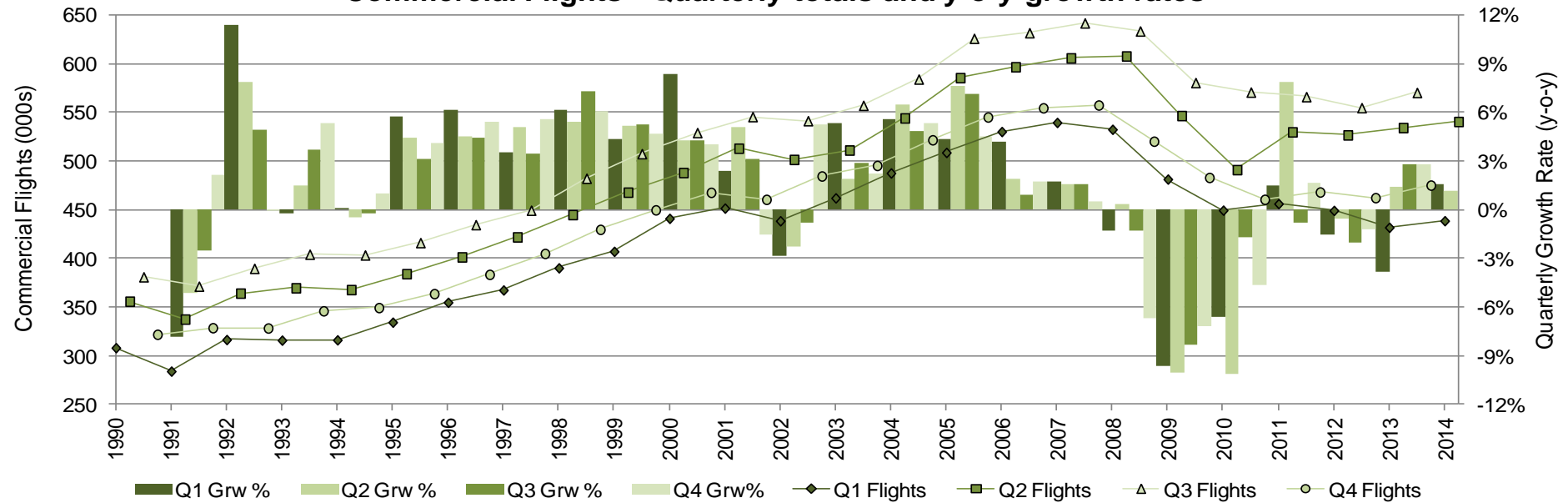
² These figures include traffic to and from North Sea oil rigs, which are excluded from the detailed tables in Parts 2 – 7.

a. Terminal passengers

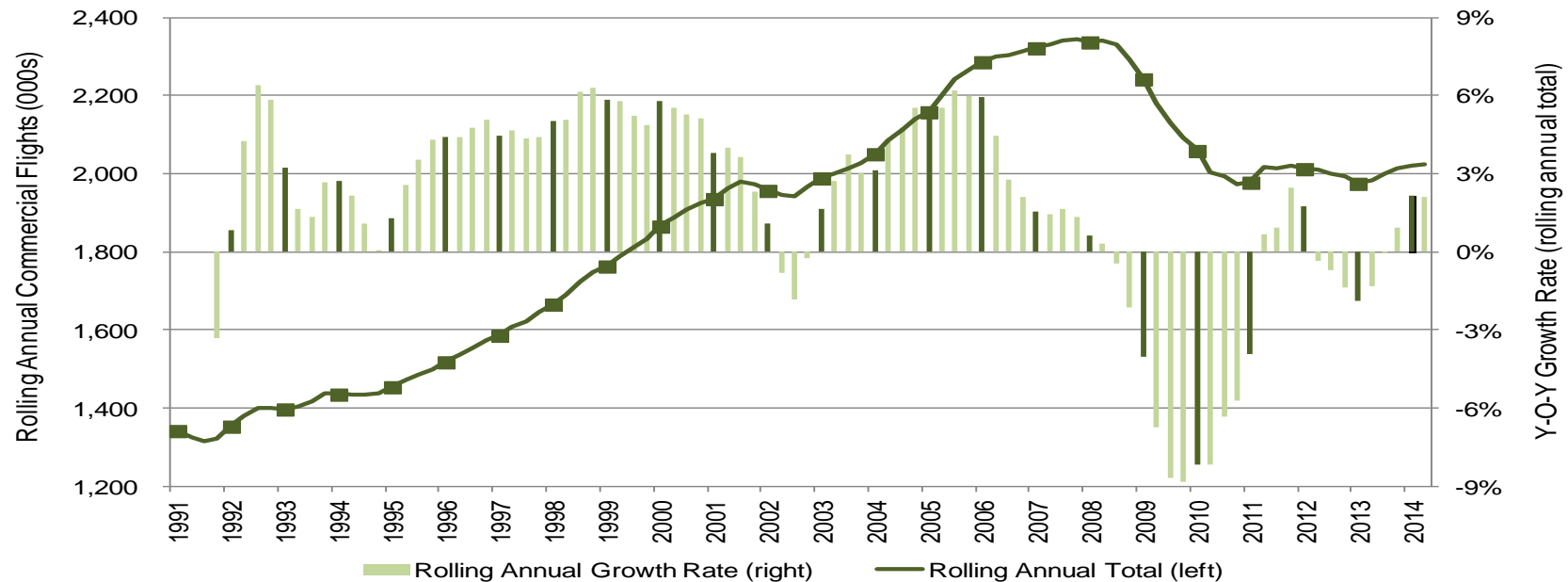


b. Commercial flights

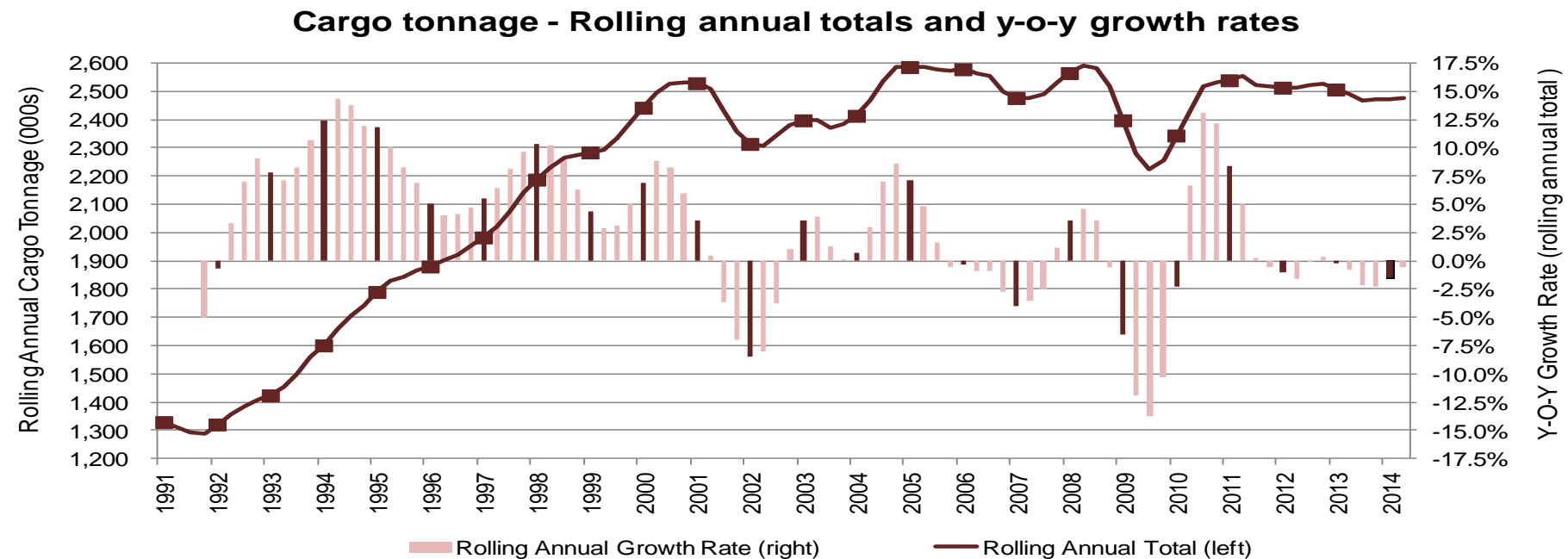
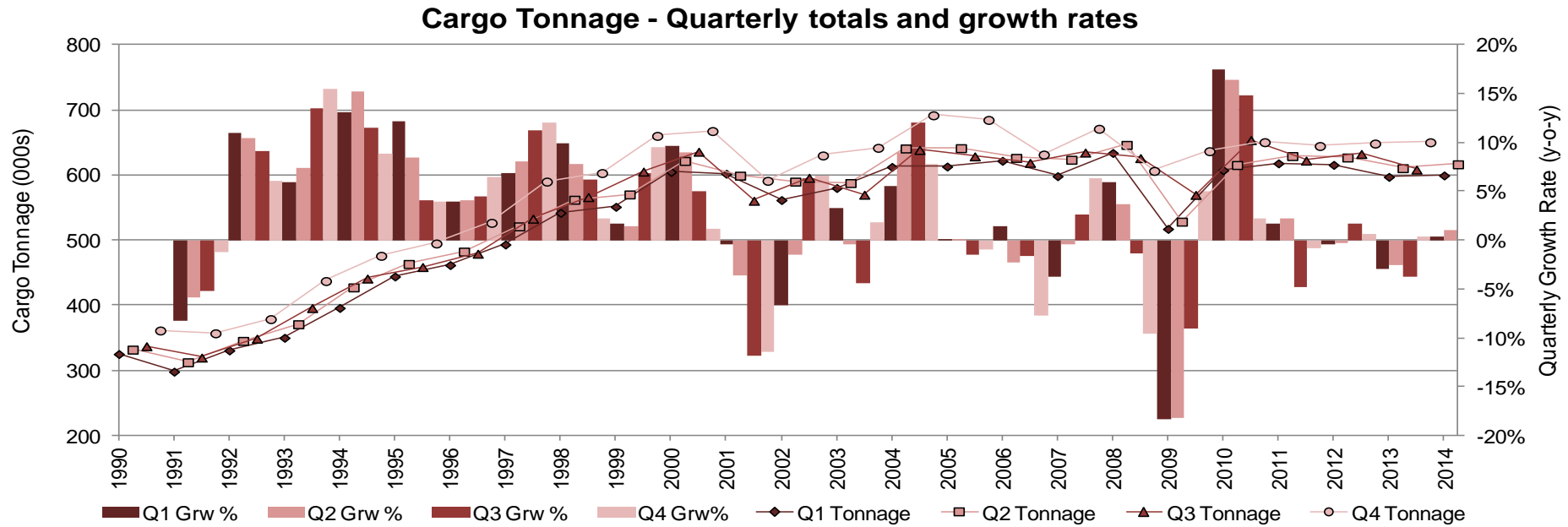
Commercial Flights - Quarterly totals and y-o-y growth rates



Commercial flights : Rolling annual totals and y-o-y growth rates

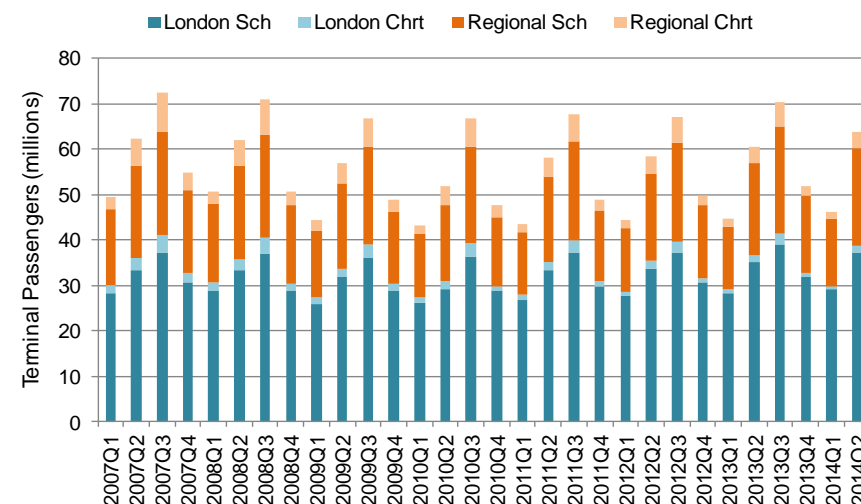


c. Cargo tonnage



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

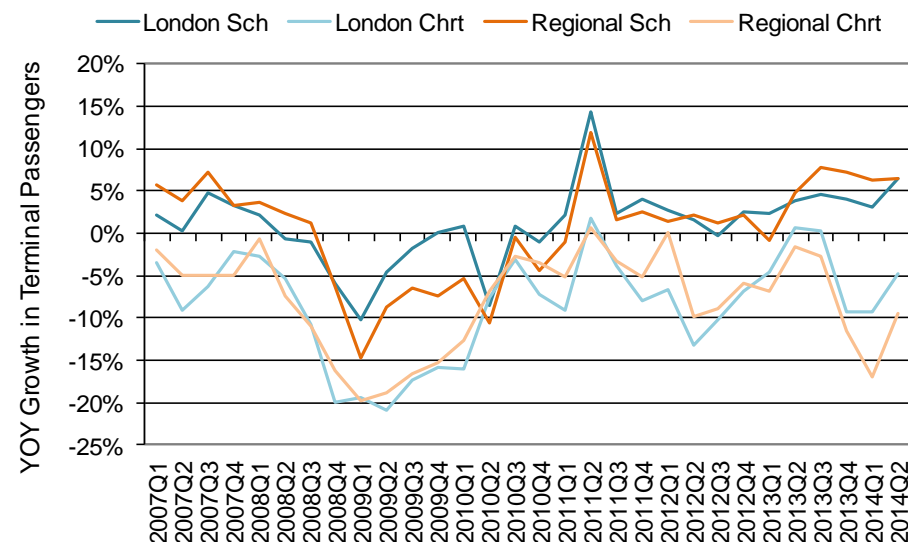
Passengers (Millions)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2014		Q2 2013			Q3 13 - Q2 14		Q3 12 - Q2 13		
	Pax (Millions)	% of total	Pax (Millions)	% of total	% chg	Pax (Millions)	% of total	Pax (Millions)	% of total	% chg
London Airports	38.7	61%	36.6	60%	6.0%	142.6	61%	136.8	62%	4.2%
- Scheduled	37.2	58%	35.0	58%	6.5%	136.9	59%	130.8	59%	4.6%
- Charter	1.5	2%	1.6	3%	-4.8%	5.7	2%	6.0	3%	-4.1%
Regional Airports	24.9	39%	24.0	40%	3.9%	89.3	39%	85.3	38%	4.6%
- Scheduled	21.5	34%	20.2	33%	6.4%	77.0	33%	72.0	32%	7.0%
- Charter	3.4	5%	3.8	6%	-9.5%	12.3	5%	13.4	6%	-8.0%
All Airports	63.7	100%	60.5	100%	5.2%	231.9	100%	222.1	100%	4.4%
- Scheduled	58.8	92%	55.2	91%	6.5%	213.9	92%	202.8	91%	5.5%
- Charter	4.9	8%	5.3	9%	-8.1%	18.0	8%	19.3	9%	-6.8%



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.

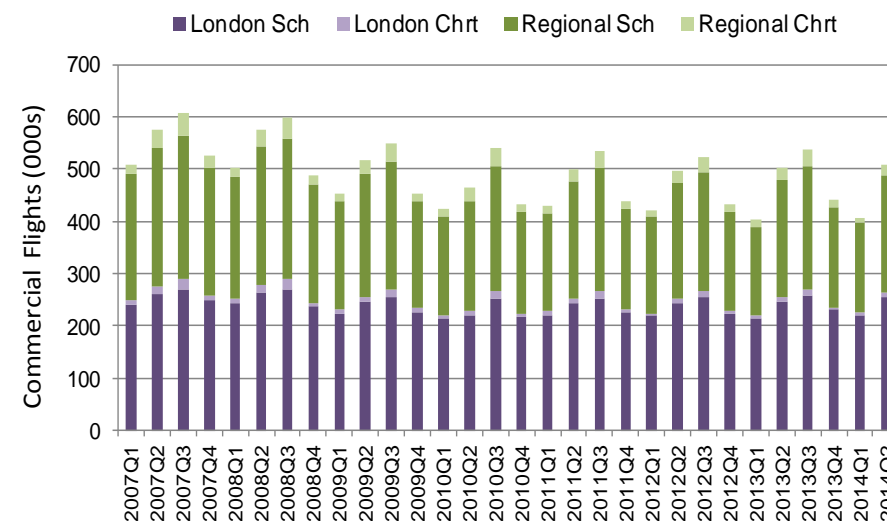
In Q2 2014, London airports handled 6.0% more passengers, and regional airports 3.9% more than in the same quarter last year, driven by strong growth in scheduled traffic. On a rolling year basis, total passenger numbers were 4.2% higher at London airports and 4.6% higher at regional airports than the year before.

Across all UK airports, the number of passengers on scheduled flights was up 6.5%, but down 8.1% on charter flights compared with the same quarter in 2013.



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

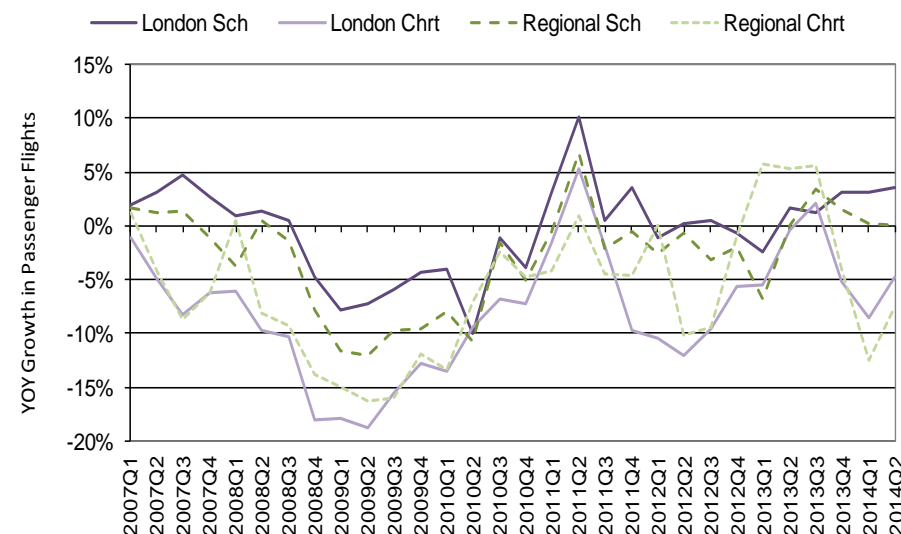
No. of Flights	CURRENT QUARTER					ROLLING YEAR				
	Q2 2014		Q2 2013			Q3 13 - Q2 14		Q3 12 - Q2 13		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
London Airports	264.3	52%	256.0	51%	3.2%	994.6	53%	970.4	52%	2.5%
- Scheduled	255.9	50%	247.3	49%	3.5%	963.3	51%	938.2	50%	2.7%
- Charter	8.3	2%	8.8	2%	-4.8%	31.3	2%	32.2	2%	-2.8%
Regional Airports	243.3	48%	245.1	49%	-0.7%	898.1	47%	889.5	48%	1.0%
- Scheduled	222.3	44%	222.3	44%	0.0%	820.6	43%	809.7	44%	1.3%
- Charter	21.0	4%	22.8	5%	-7.6%	77.5	4%	79.8	4%	-2.9%
All Airports	507.6	100%	501.1	100%	1.3%	1,892.7	100%	1,859.9	100%	1.8%
- Scheduled	478.2	94%	469.6	94%	1.8%	1,784.0	94%	1,748.0	94%	2.1%
- Charter	29.4	6%	31.5	6%	-6.8%	108.7	6%	111.9	6%	-2.9%



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

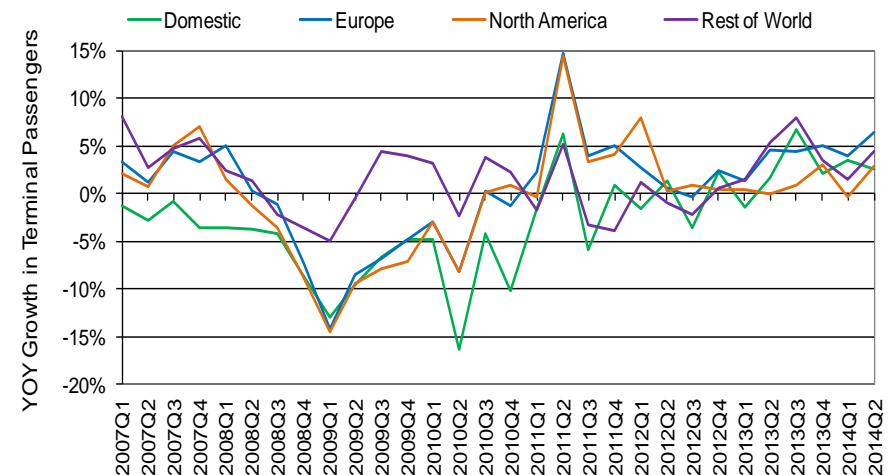
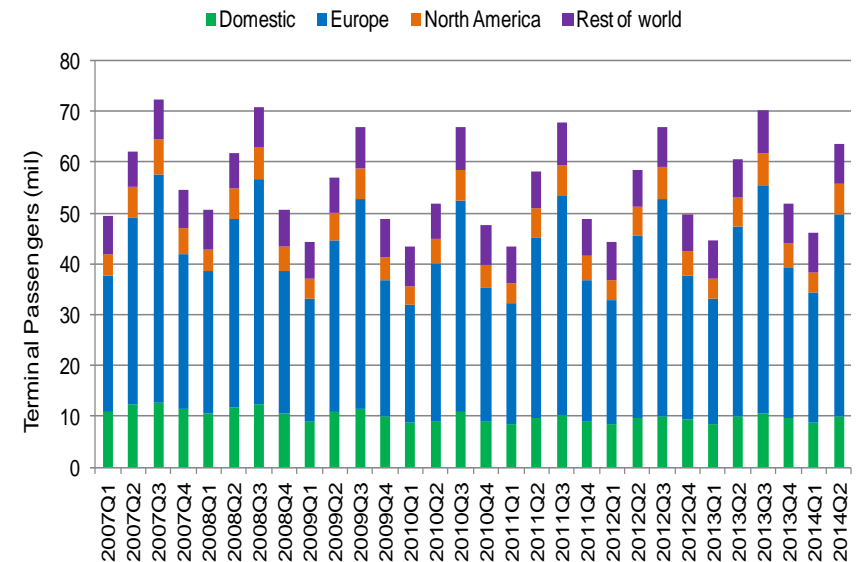
Compared to Q2 2013, the number of total passenger flights at all UK airports increased by 1.3% in Q2 2014. However, charter traffic continued to decline: there were 1.8% more scheduled flights but 6.8% less charter flights. On a rolling year basis, the number of scheduled flights was up by 1.8% and the number of charter flights was down by 2.9%.

There were 3.2% more flights at the London airports but 0.7% less flights at regional airports in Q2 2014 than in Q2 2013. On a rolling year basis, the number of flights was up by 2.5% at the London airports and by 1.0% 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				
	Q2 2014		Q2 2013			Q3 13 - Q2 14		Q3 12 - Q2 13		
	pax (mil)	% of total	pax (mil)	% of total	% chg	pax (mil)	% of total	pax (mil)	% of total	% chg
Domestic	10.1	16%	9.8	16%	2.6%	38.8	17%	37.4	17%	3.8%
- Scheduled	9.9	16%	9.7	16%	2.6%	38.3	17%	36.9	17%	3.7%
- Charter	0.1	0.2%	0.1	0.2%	-1.6%	0.5	0.2%	0.5	0.2%	7.5%
Europe	39.8	63%	37.4	62%	6.3%	140.0	60%	133.3	60%	5.0%
- Scheduled	35.8	56%	33.1	55%	8.1%	125.7	54%	118.0	53%	6.5%
- Charter	4.0	6%	4.3	7%	-7.2%	14.3	6%	15.4	7%	-6.9%
North America	5.8	9%	5.7	9%	2.9%	21.1	9%	20.7	9%	1.7%
- Scheduled	5.8	9%	5.6	9%	3.0%	20.9	9%	20.4	9%	2.3%
- Charter	0.1	0.1%	0.1	0.1%	-1.3%	0.2	0.1%	0.3	0.1%	-37.4%
Rest of World	8.0	12%	7.6	13%	4.5%	32.0	14%	30.7	14%	4.4%
- Scheduled	7.2	11%	6.8	11%	6.9%	29.0	13%	27.5	12%	5.5%
- Charter	0.7	1%	0.9	1%	-14.4%	3.0	1%	3.2	1%	-5.3%
Total	63.7	100%	60.5	100%	5.2%	231.9	100%	222.1	100%	4.4%
- Scheduled	58.8	92%	55.2	91%	6.5%	213.9	92%	202.8	91%	5.5%
- Charter	4.9	8%	5.3	9%	-8.1%	18.0	8%	19.3	9%	-6.8%

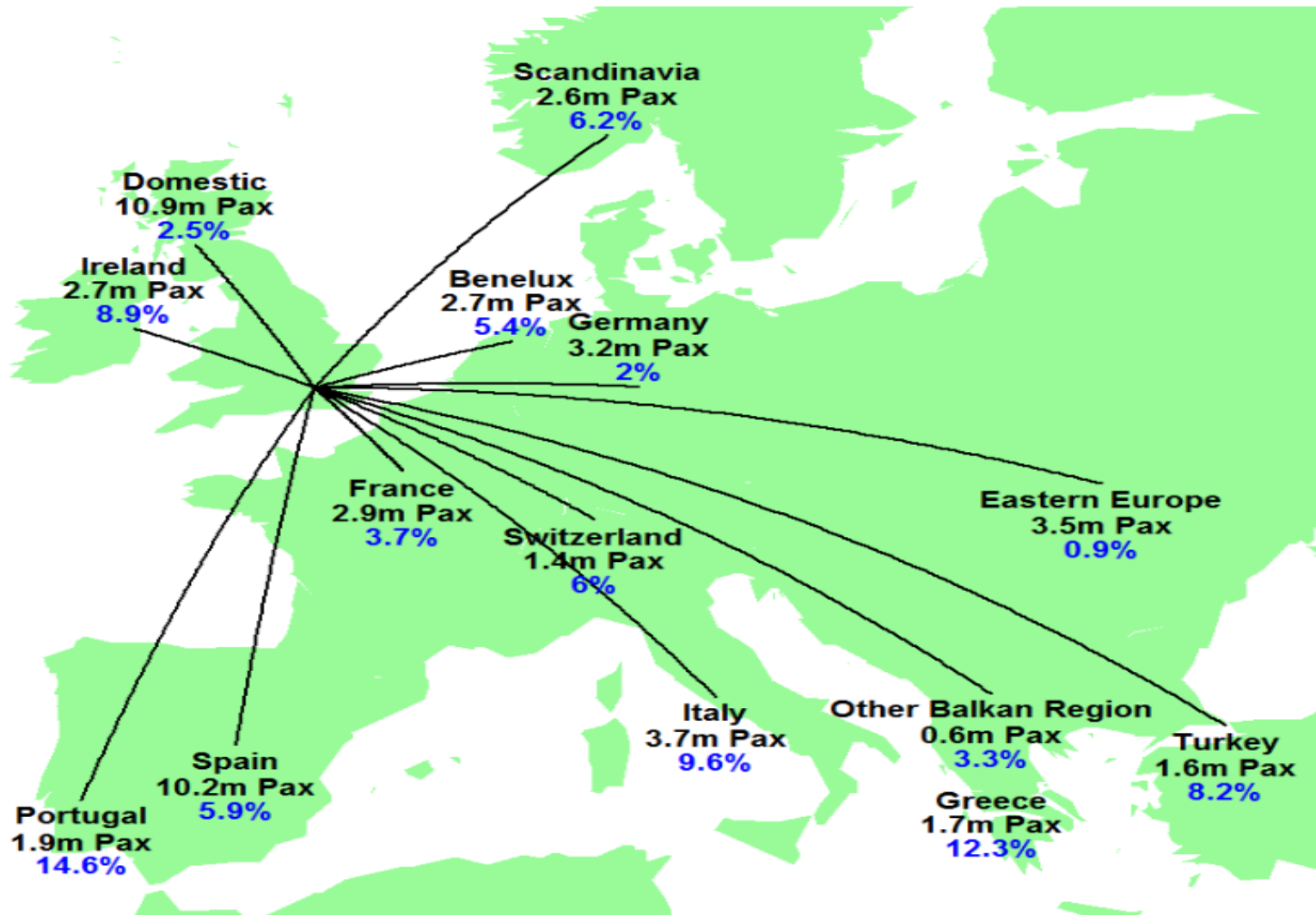


Compared to the same quarter last year, there have been increases in the number of passengers travelling to and from all geographical regions: Europe (6.3%), North America (2.9%), Rest of the World (4.5%) and Domestic destinations (2.6%).

On a rolling year basis, the total number of passengers was up by 4.4%. This was made up of an increase of 5.0%, 1.7% and 4.4% of passengers travelling to and from Europe, North America and Rest of the World respectively, and a 3.8% rise in domestic traffic. Overall, passengers on charter flights have declined by 8.1% in Q2 2014 and by 6.8% on a rolling year basis.

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

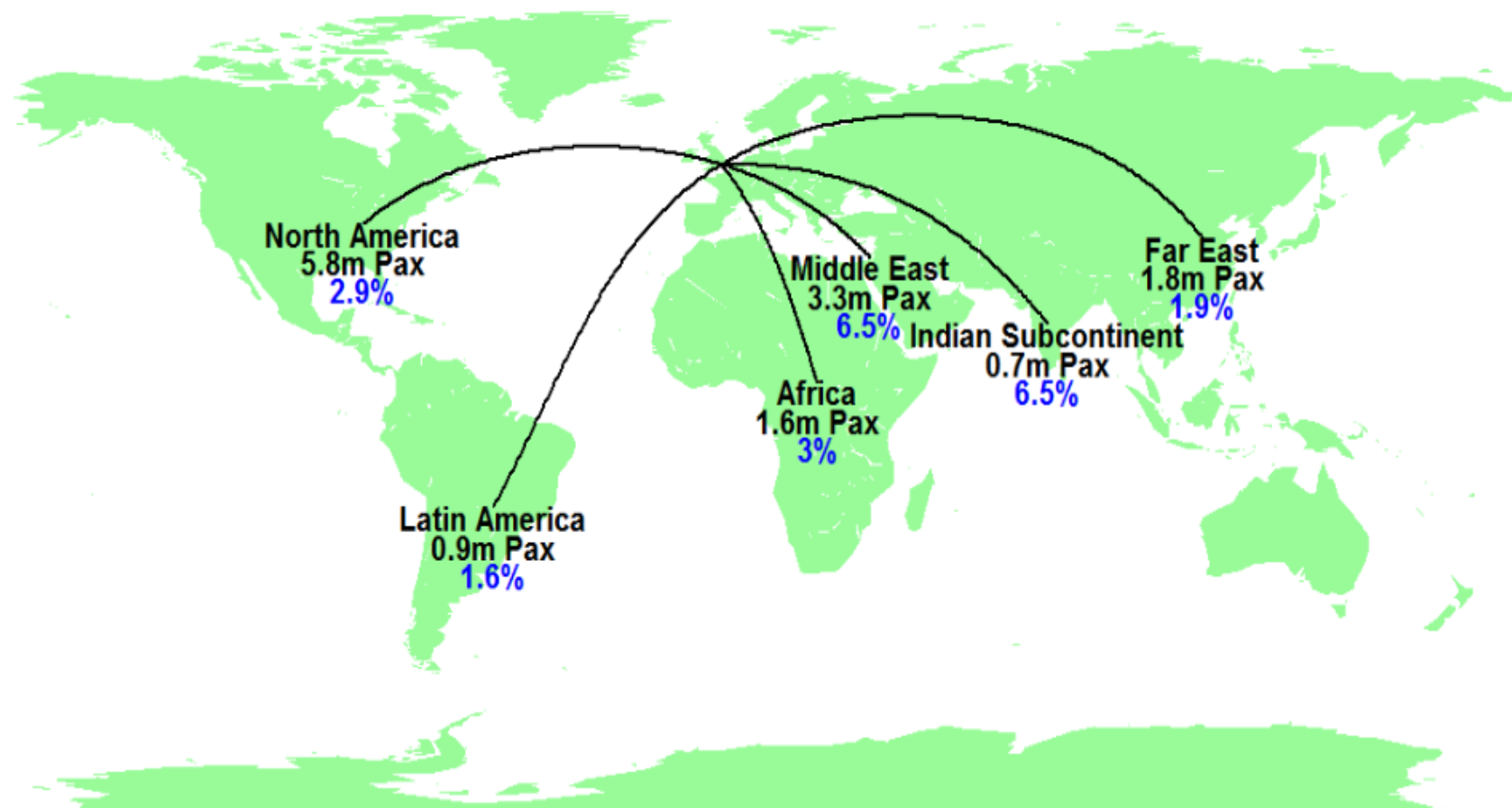
Total passengers numbers Q2 2014 and % change from Q2 2013



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 sector origin/destination – Travel outside of Europe

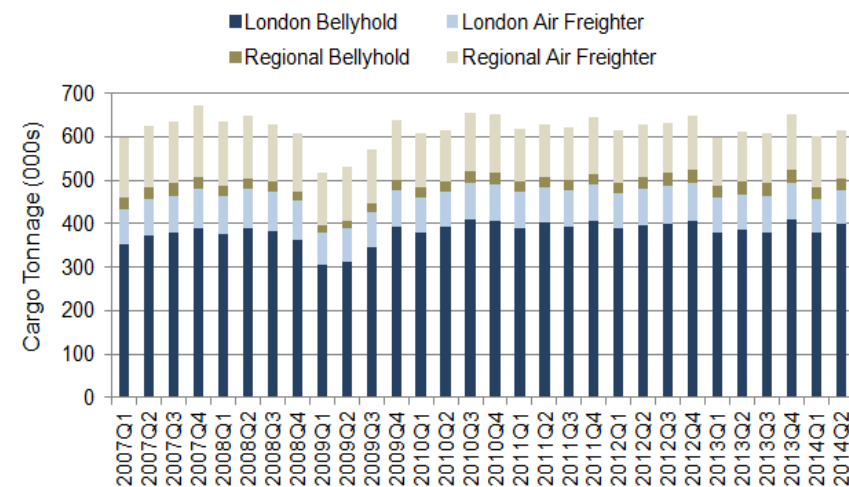
Total passengers numbers Q2 2014 and % change from Q2 2013



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

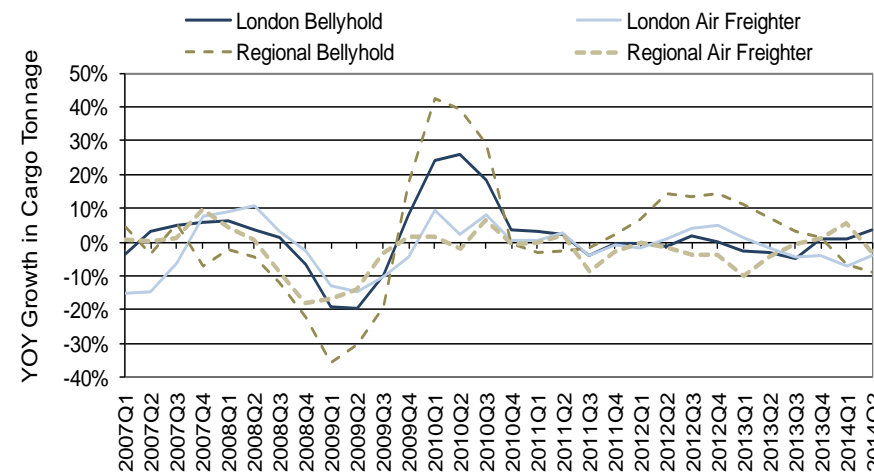
Tonnes (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2014		Q2 2013			Q3 13 - Q2 14		Q3 12 - Q2 13		
	Tonnes (000s)	% of total	Tonnes (000s)	% of total	% chg	Tonnes (000s)	% of total	Tonnes (000s)	% of total	% chg
Cargo on cargo only flights	188.8	31%	196.2	32%	-3.8%	791.3	32%	804.6	32%	-1.7%
London	77.8	13%	81.2	13%	-4.2%	320.6	13%	336.9	14%	-4.8%
Regional	111.0	18%	115.0	19%	-3.5%	470.6	19%	467.6	19%	0.6%
Bellyhold cargo	425.9	69%	414.7	68%	2.7%	1,682.5	68%	1,685.2	68%	-0.2%
London	398.4	65%	384.5	63%	3.6%	1,569.0	63%	1,568.5	63%	0.0%
Regional	27.4	4%	30.2	5%	-9.0%	113.4	5%	116.7	5%	-2.8%
Total cargo	614.7	100%	610.9	100%	0.6%	2,473.7	100%	2,489.8	100%	-0.6%
London	476.3	77%	465.8	76%	2.3%	1,889.7	76%	1,905.5	77%	-0.8%
Regional	138.4	23%	145.2	24%	-4.6%	584.1	24%	584.3	23%	0.0%



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

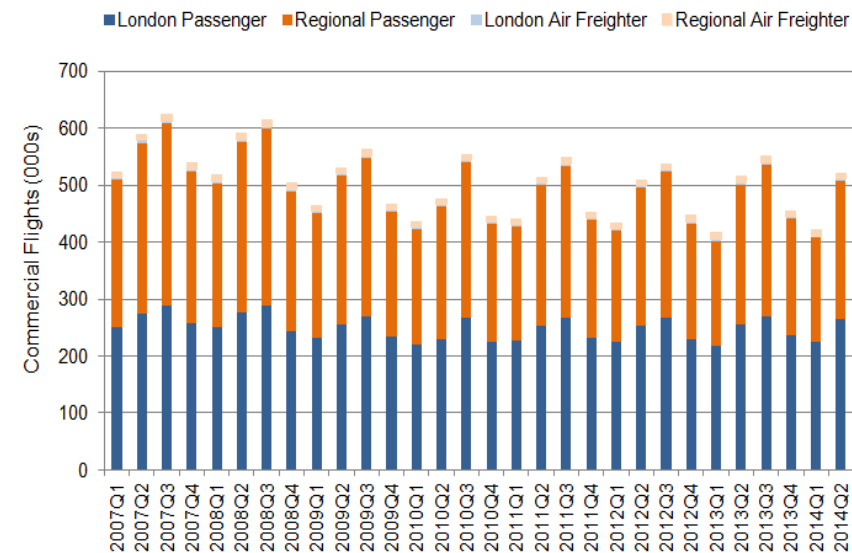
Compared to Q2 2013, total cargo tonnage at all UK airports was up 0.6% in Q2 2014. This consisted of an increase of 2.3% at London airports and a decrease of 4.6% at Regional airports. Whilst air freighter tonnage decreased by 3.8%, bellyhold cargo tonnage increased by 2.7% compared with the same quarter last year.

On a rolling year basis, total cargo tonnage handled at UK airports was down by 0.6% compared with the year before, driven by 1.7% and 0.2% reduction in air freighter and bellyhold cargo tonnage respectively.



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

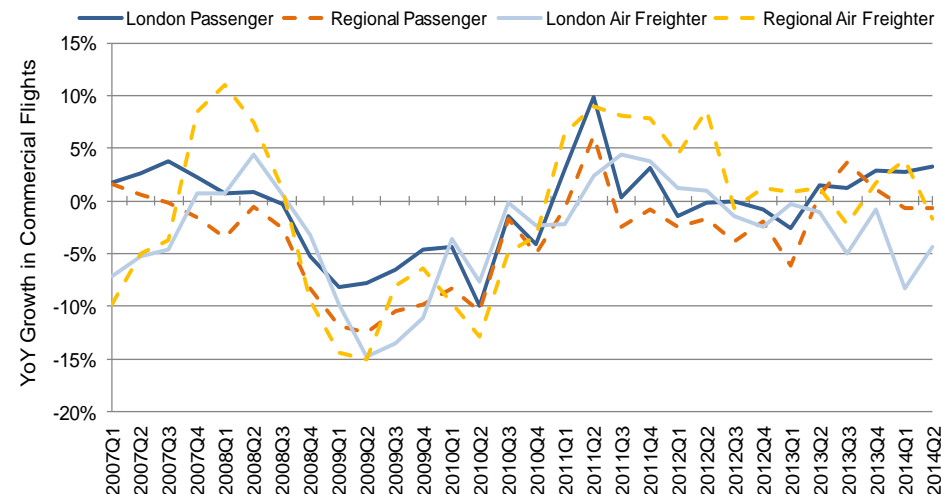
Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2014		Q2 2013			Q3 13 - Q2 14		Q3 12 - Q2 13		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
Air freighter	13.0	2%	13.3	3%	-2.4%	53.5	3%	54.0	3%	-0.9%
London	3.3	1%	3.5	1%	-4.3%	13.4	1%	14.1	1%	-4.6%
Regional	9.7	2%	9.9	2%	-1.7%	40.1	2%	39.9	2%	0.4%
Passenger flights	507.6	98%	501.1	97%	1.3%	1,892.7	97%	1,859.9	97%	1.8%
London	264.3	51%	256.0	50%	3.2%	994.6	51%	970.4	51%	2.5%
Regional	243.3	47%	245.1	48%	-0.7%	898.1	46%	889.5	46%	1.0%
Total flights	520.6	100%	514.4	100%	1.2%	1,946.2	100%	1,913.8	100%	1.7%
London	267.6	51%	259.5	50%	3.1%	1,008.0	52%	984.5	51%	2.4%
Regional	253.0	49%	254.9	50%	-0.8%	938.1	48%	929.4	49%	0.9%



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 Q2 2014, the total number of commercial flights in the UK was up 1.2% compared to Q2 2013 as a result of a 1.3% increase in the number of passenger flights and a 2.4% reduction in the number of freighter flights.

The London airports saw an overall increase of 3.1% in total number of flights whereas the regional airports experienced a reduction of 0.8%. On a rolling year basis, the total number of flights was up 1.7% 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

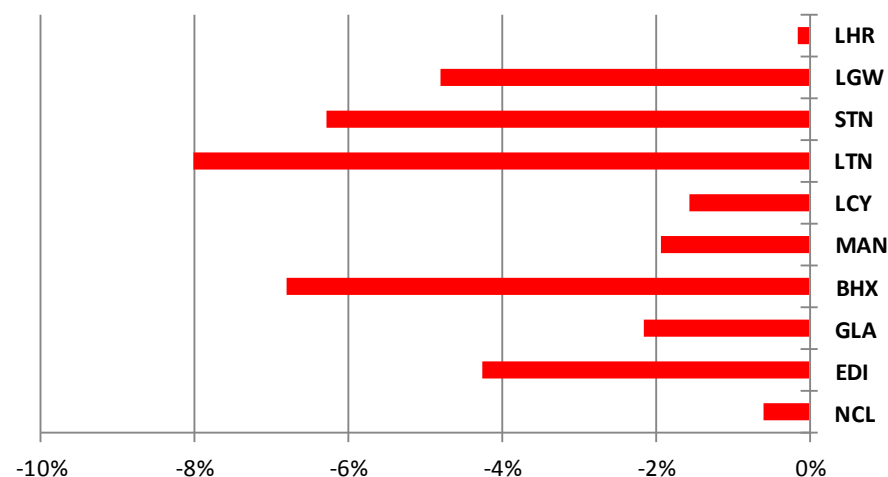
Matched flights (000s), % of flights on-time	CURRENT QUARTER					ROLLING YEAR				
	Q2 2014		Q2 2013		Change (% points)	Q3 13 - Q2 14		Q3 12 - Q2 13		Change (% points)
	Flights (000s)	% on-time	Flights (000s)	% on-time		Flights (000s)	% on-time	Flights (000s)	% on-time	
London Airports	260.1	77.1%	252.6	80.0%	-2.9%	980.0	79.1%	956.7	78.2%	0.9%
- Heathrow	118.9	76.8%	118.4	77.0%	-0.2%	467.5	77.5%	463.8	75.9%	1.6%
- Gatwick	68.2	73.6%	64.9	78.4%	-4.8%	250.2	76.8%	238.4	76.5%	0.3%
- Stansted	35.8	79.6%	33.0	85.9%	-6.3%	125.7	82.9%	121.1	83.1%	-0.2%
- Luton	19.8	75.1%	18.4	83.1%	-8.0%	68.8	80.7%	67.2	80.9%	-0.2%
- London City	17.3	90.2%	17.9	91.8%	-1.6%	67.8	89.3%	66.2	88.9%	0.4%
Regional Airports	124.8	80.4%	123.3	83.7%	-3.3%	456.4	82.7%	448.8	81.6%	1.2%
- Manchester	44.0	77.6%	42.9	79.5%	-1.9%	159.6	79.4%	157.5	77.5%	1.9%
- Birmingham	23.9	81.6%	22.5	88.4%	-6.8%	86.3	85.4%	81.9	84.5%	0.8%
- Glasgow	19.5	81.3%	19.4	83.4%	-2.2%	71.9	83.6%	71.4	83.0%	0.6%
- Edinburgh	26.0	81.5%	27.3	85.7%	-4.3%	97.4	84.1%	96.5	84.1%	0.0%
- Newcastle	11.4	85.0%	11.2	85.6%	-0.6%	41.3	85.5%	41.5	82.7%	2.8%
All Airports	385.0	78.2%	375.9	81.2%	-3.0%	1,436.4	80.2%	1,405.5	79.3%	1.0%

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 Q2 2014, only 78.2% of all measured flights were on time, which was down by 3.0 percentage points compared to the same quarter last year. The erosion in percentage of on-time performance compared with the same quarter in 2013 appeared to affect all the monitored airports. On a rolling year basis, the percentage of on-time flights increased by 1.0 percentage points across the ten London and regional airports.

q-o-q change in on-time performance (% points)

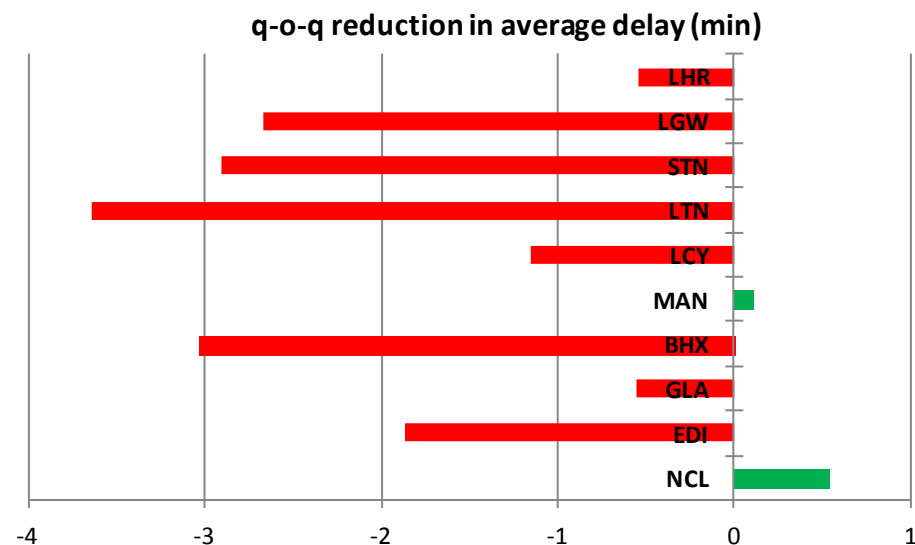


b. Average Delay

Matched flights (000s), Average Delay (min)	CURRENT QUARTER					ROLLING YEAR				
	Q2 2014		Q2 2013		Reduction in Avg. delay (min)	Q3 13 - Q2 14		Q3 12 - Q2 13		Reduction 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	260.1	12.9	252.6	11.2	-1.7	980.0	12.1	956.7	12.5	0.5
- Heathrow	118.9	12.9	118.4	12.4	-0.5	467.5	12.8	463.8	13.5	0.7
- Gatwick	68.2	15.5	64.9	12.8	-2.7	250.2	13.7	238.4	14.0	0.3
- Stansted	35.8	11.1	33.0	8.2	-2.9	125.7	9.6	121.1	9.7	0.1
- Luton	19.8	13.8	18.4	10.2	-3.6	68.8	11.1	67.2	11.6	0.4
- London City	17.3	5.9	17.9	4.7	-1.1	67.8	6.6	66.2	6.5	-0.1
Regional Airports	124.8	11.5	123.3	10.5	-1.0	456.4	10.4	448.8	11.7	1.2
- Manchester	44.0	12.8	42.9	12.9	0.1	159.6	12.0	157.5	14.2	2.2
- Birmingham	23.9	10.7	22.5	7.6	-3.0	86.3	9.1	81.9	10.0	0.9
- Glasgow	19.5	11.4	19.4	10.9	-0.5	71.9	10.5	71.4	10.9	0.4
- Edinburgh	26.0	10.6	27.3	8.7	-1.9	97.4	9.4	96.5	9.4	0.0
- Newcastle	11.4	9.9	11.2	10.4	0.5	41.3	9.3	41.5	11.8	2.5
All Airports	385.0	12.5	375.9	11.0	-1.5	1,436.4	11.5	1,405.5	12.3	0.7

Average delay per flight across the ten airports was 12.5 minutes for Q2 2014. This represented an increase of 1.5 minutes against the same quarter last year. Only Manchester and Newcastle airports registered an improvement in average delay compared with the same quarter in 2013.

On a rolling year basis, the overall average delay per flight reduced by 0.7 minutes compared with the year before.



Did you know?

CAA 2013 Passenger Survey Report: Coming soon!

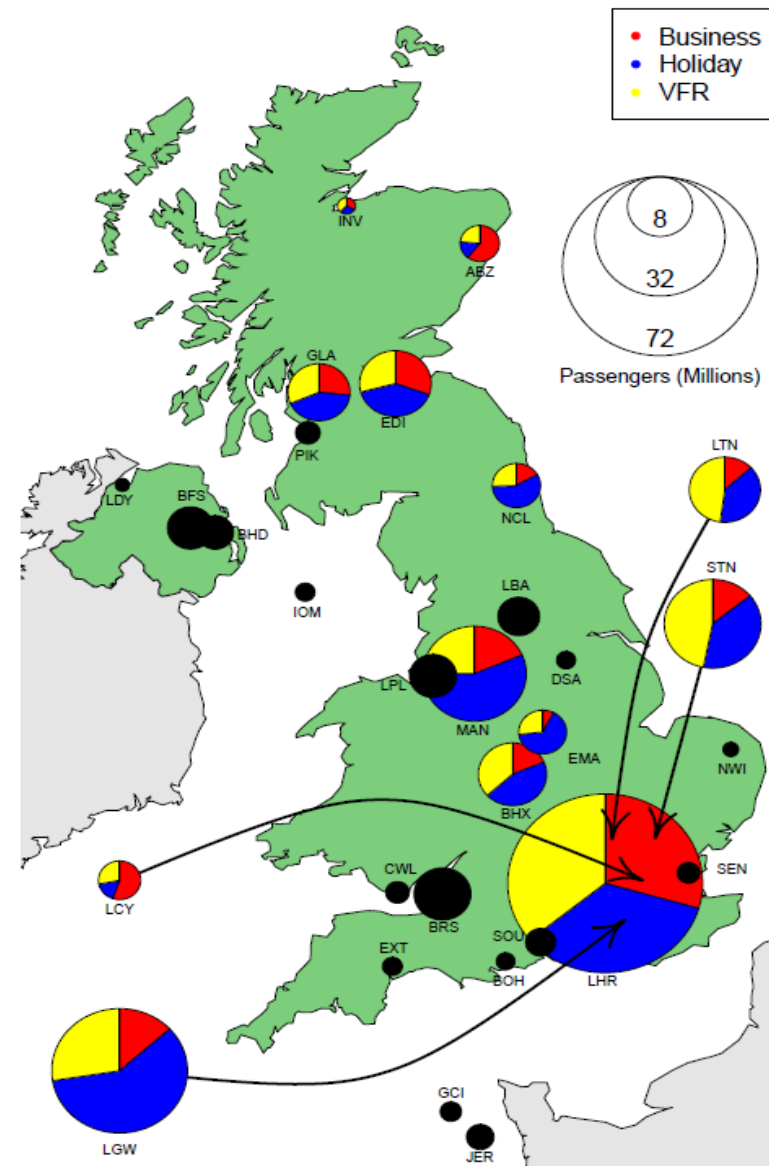
The CAA will be shortly publishing the annual passenger survey report on the airports it covered in 2013. As in 2012, the CAA covered Heathrow, Gatwick, Stansted, Luton, London City, Manchester, Birmingham and East Midlands airports. In 2013, the survey also covered four Scottish airports and Newcastle.

The chart shows the number of passengers at UK airports and, for the ones where the CAA interviewed in 2013, the proportion of passengers travelling on business, holiday, and visiting friends and relatives purposes.

It can be seen that, for example, the majority of passengers at London City and Aberdeen were travelling on Business while most passengers at East Midlands, Gatwick, Newcastle and Manchester were travelling on holidays.

Between 2012 and 2013 and for the eight airports surveyed in both years, the number passengers travelling for business increased by 1% and passengers travelling for holidays increased by 3%. The number of passengers travelling to visit friends and relatives, a segment that has been growing strongly in the past decade, increased by 7%.

Passengers by Journey Purpose, 2013



Source: CAA Passenger Survey

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 oil rigs.		✓	✓	✓	✓	✓
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.