

Aviation Trends

Quarter 1 2015



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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.

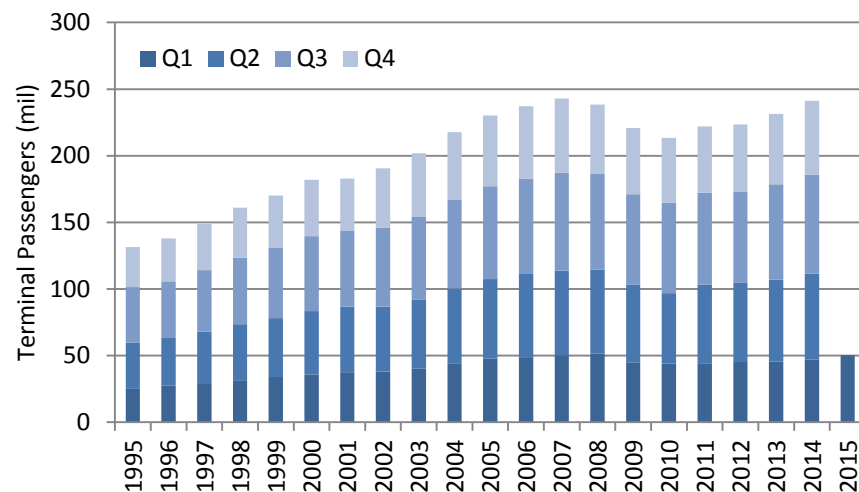
The Aviation Trends series is available at www.caa.co.uk/aviationtrends, part of Aviation Intelligence, the online home of the CAA's monthly airport and airline statistical publications. Please note that historic numbers may be subject to minor change as the result of prior period adjustments.¹ Due to 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.15

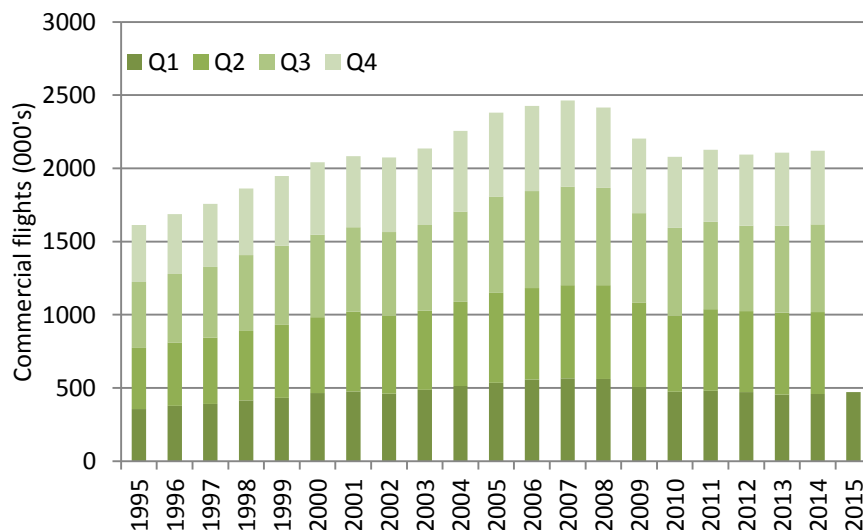
a. Terminal passengers



b. Cargo tonnage



c. Commercial flights



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.

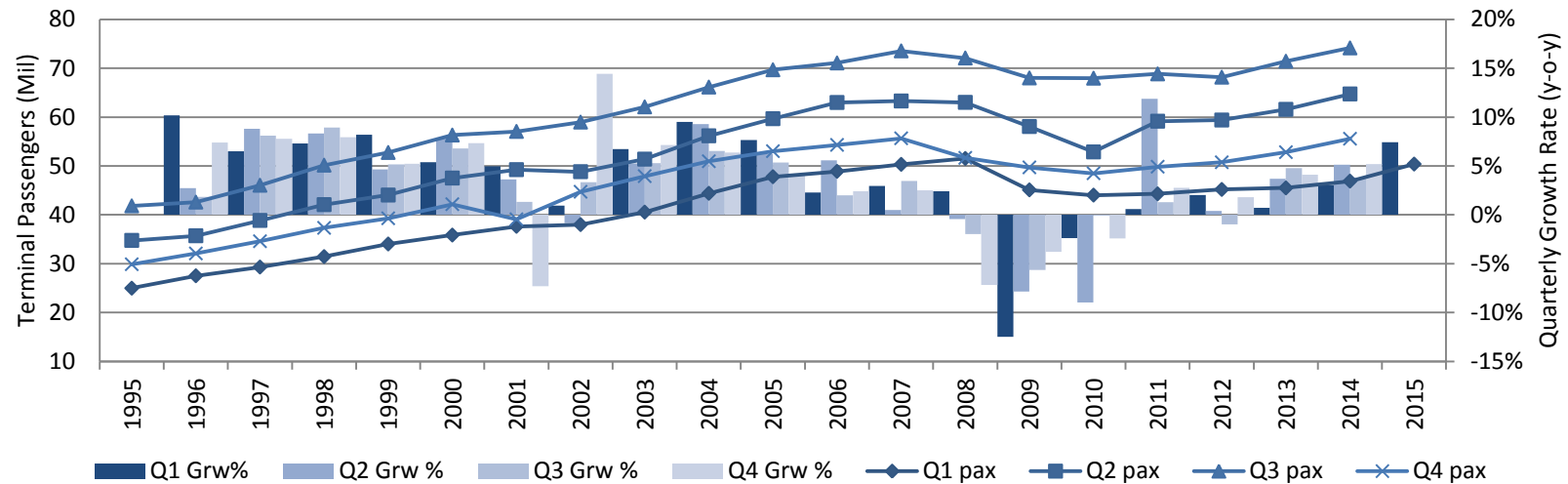
On pages 4 to 6, the top charts show traffic volume in each quarter (left axis), and the corresponding year-on-year quarterly growth rates (right axis). The bottom charts show the rolling annual total traffic in each quarter (left axis), and the year-on-year percentage growth of the rolling annual total (right axis). The highlighted data points indicate the annual traffic volumes and growth rates of the respective calendar years.

In Q1 2015, UK airports handled 50.4 million terminal passengers, 471 thousand commercial flights, and 614 thousand tonnes of cargo, increases of 7.4%, 2.9% and 1.8% respectively, compared to Q1 2014.

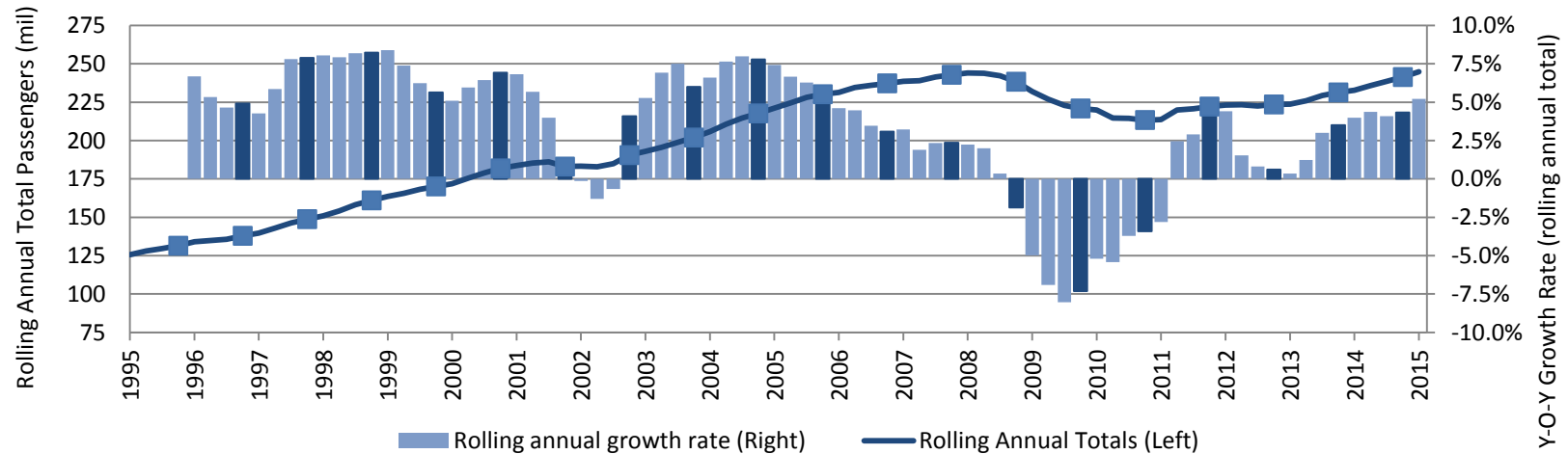
On a rolling 12 month basis, terminal passenger numbers have hit record levels (244m pax), surpassing the previous peak (243m pax) just prior to the 2008-09 financial crisis.

a. Terminal passengers

Terminal passengers - Quarterly totals and y-o-y growth rates

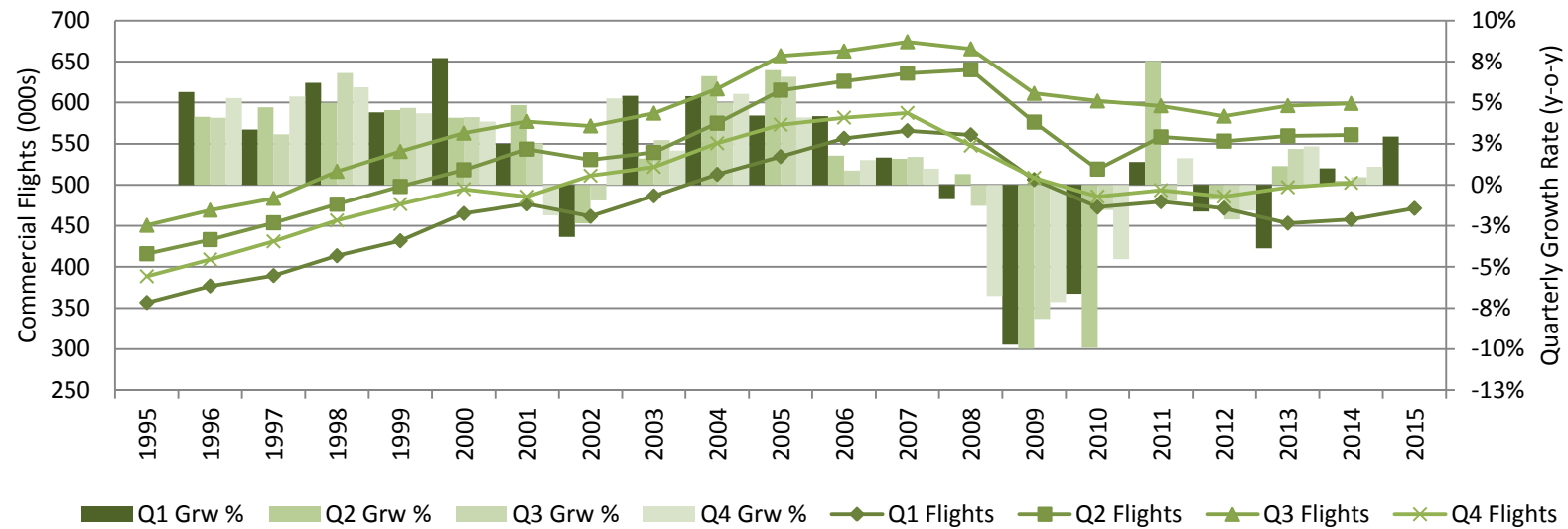


Terminal Passengers - Rolling annual totals and Y-O-Y growth rates

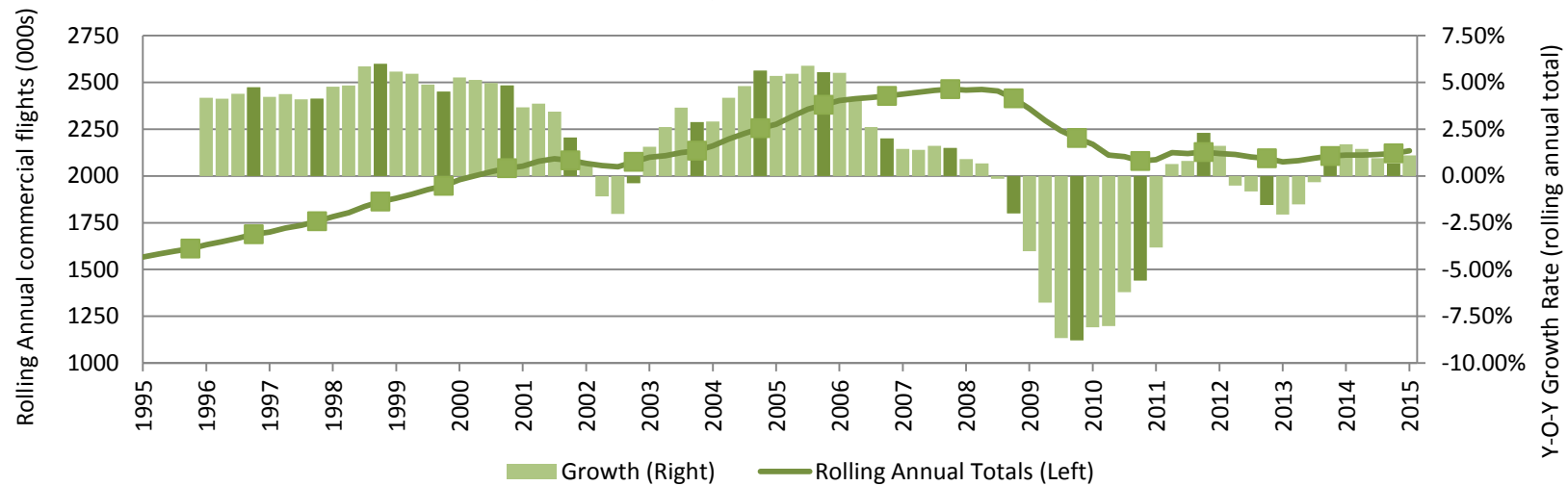


b. Commercial flights

Commercial Flights - Quarterly totals and growth rates

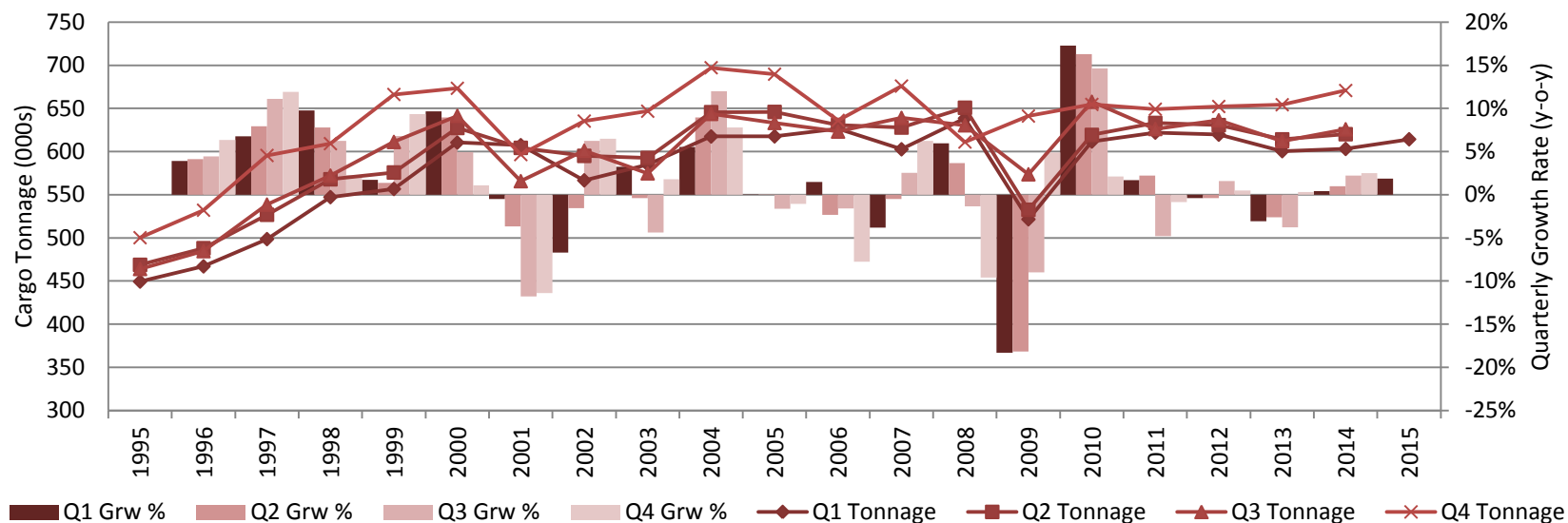


Commercial flights - Rolling annual totals and Y-O-Y growth rates

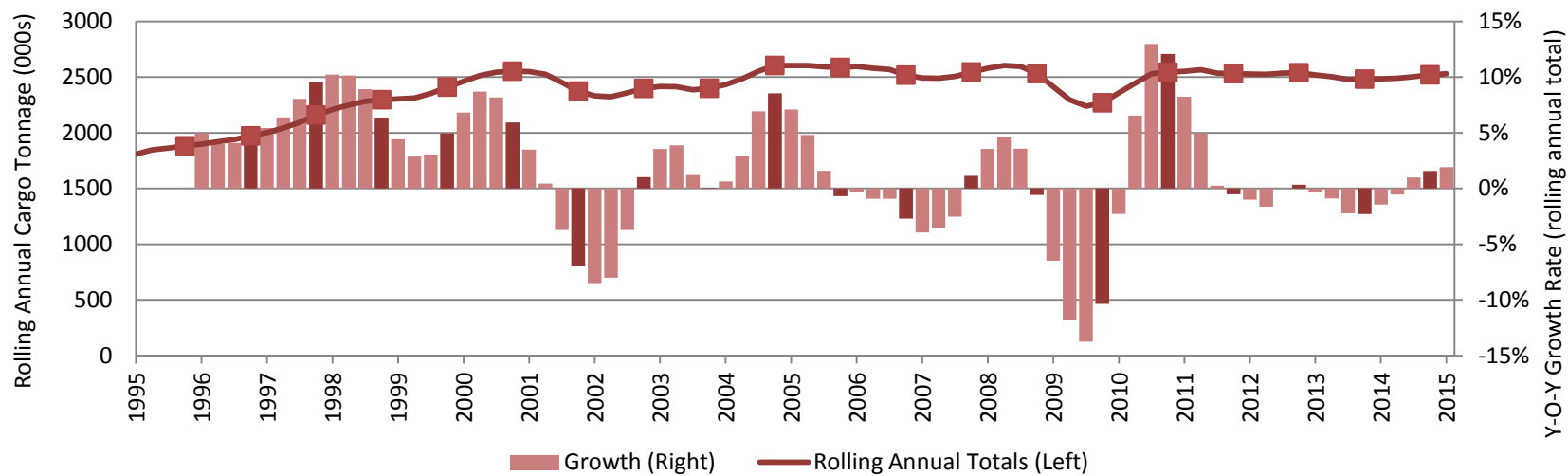


c. Cargo tonnage

Cargo Tonnage Quarterly totals and growth rates



Cargo tonnage- Rolling annual totals and Y-O-Y growth rates



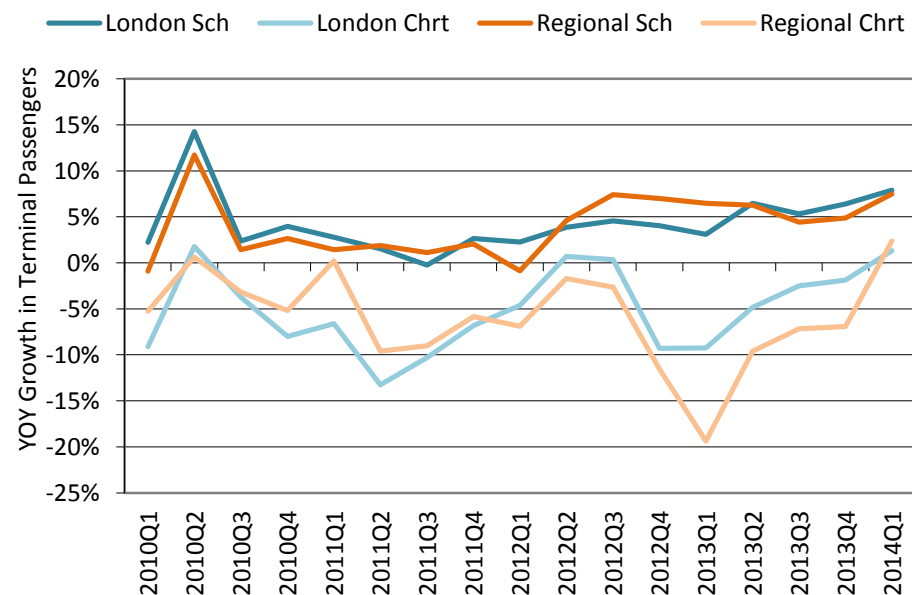
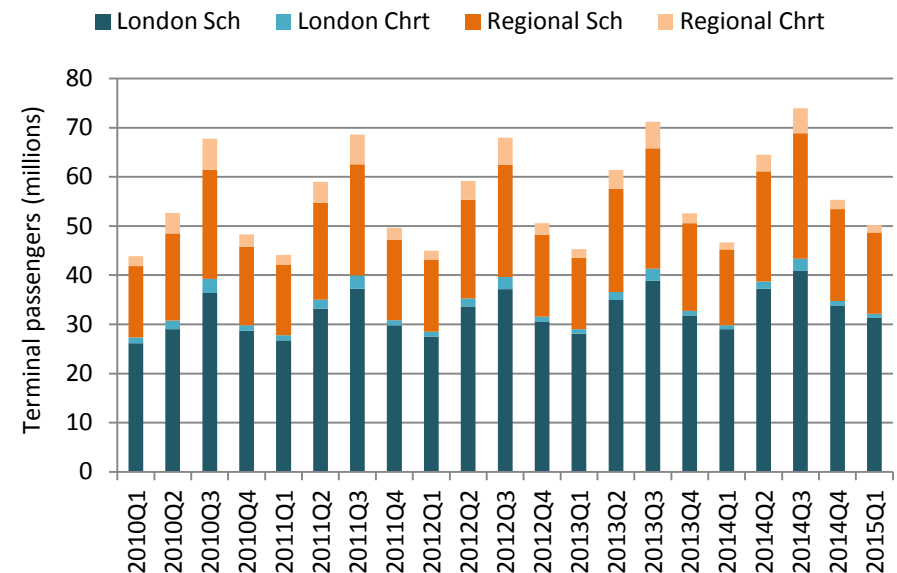
2. Terminal passengers at UK airports see note 5 on p.15

Pax (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2015		Q1 2014			Q2 14 – Q1 15		Q2 13 – Q1 14		
	Pax (Mil)	% of total	Pax (Mil)	% of total	% chg	Pax (Mill)	% of total	Pax (Mil)	% of total	% chg
London Airports	32.1	64%	29.8	64%	7.7%	148.9	61%	140.4	61%	6.1%
- Scheduled	31.3	62%	29.0	62%	7.9%	143.3	59%	134.6	58%	6.4%
- Charter	0.8	2%	0.8	2%	1.3%	5.6	2%	5.8	2%	-2.5%
Regional Airports	18.0	36%	16.9	36%	7.0%	95.0	39%	91.4	39%	3.9%
- Scheduled	16.6	33%	15.4	33%	7.5%	83.2	34%	78.8	34%	5.6%
- Charter	1.5	3%	1.4	3%	2.4%	11.8	5%	12.7	5%	-6.8%
All Airports	50.2	100%	46.7	100%	7.5%	243.9	100%	231.8	100%	5.2%
- Scheduled	47.9	95%	44.4	95%	7.7%	226.5	93%	213.4	92%	6.1%
- Charter	2.3	5%	2.3	5%	2.0%	17.4	7%	18.4	8%	-5.4%

UK terminal passengers are those travellers who board or disembark an aircraft on a commercial flight at a reporting UK airport. The figures in this section therefore exclude transit passengers – those who remain onboard aircraft which land at a UK airport and then continue on to another destination.

In Q1 2015, London airports handled 7.7% more passengers and regional airports 7.0% more than in the same quarter last year, on both counts driven by strong growth in scheduled traffic. On a rolling year basis covering Q2 2014 to Q1 2015, total passenger numbers were 6.1% higher at London airports and 3.9% higher at regional airports than the year before.

Across all UK airports, the number of passengers on scheduled flights was up 7.7%, and up 2.0% on charter flights when compared with the same quarter last year.



3. Passenger flights to and from UK airports see note 5 on p.15

Flights (000's)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2015		Q1 2014			Q2 14 – Q1 15		Q2 13 – Q1 14		
	Flights (000s)	% of total	Flights (000s)	% of total	% chg	Flights (000s)	% of total	Flights (000s)	% of total	% chg
London Airports	234.6	53%	224.7	53%	4.4%	1022.1	51%	986.4	50%	3.6%
- Scheduled	229.8	52%	219.9	52%	4.5%	991.1	50%	954.7	48%	3.8%
- Charter	4.8	1%	4.8	1%	1.3%	31.0	2%	31.7	2%	-2.3%
Regional Airports	205.4	47%	200.8	47%	2.3%	977.0	49%	987.6	50%	-1.1%
- Scheduled	194.3	44%	189.8	45%	2.4%	901.4	45%	908.1	46%	-0.7%
- Charter	11.1	3%	11.0	3%	1.0%	75.6	4%	79.5	4%	-5.0%
All Airports	440.1	100%	425.5	100%	3.4%	1999.0	100%	1974.0	100%	1.3%
- Scheduled	424.1	96%	409.7	96%	3.5%	1892.5	95%	1862.7	94%	1.6%
- Charter	15.9	4%	15.8	4%	1.1%	106.6	5%	111.2	6%	-4.2%

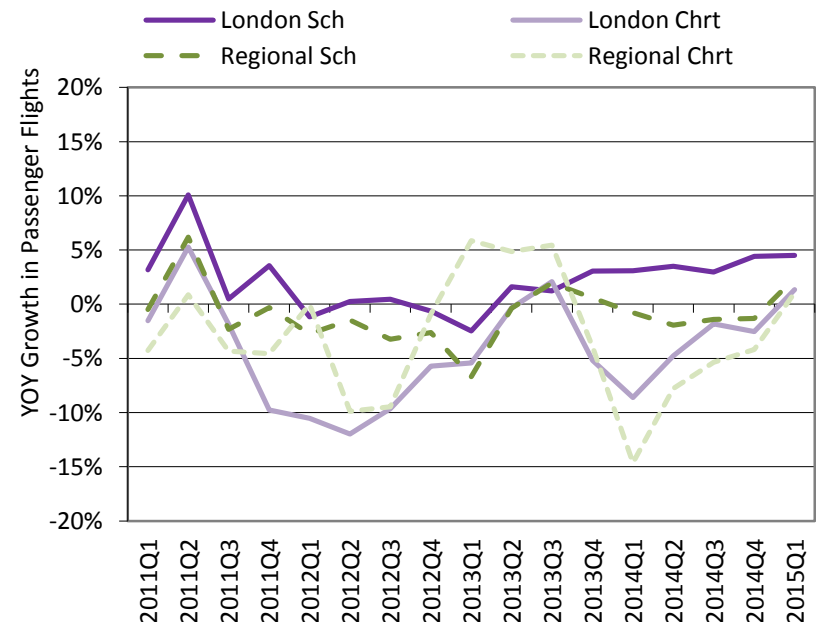
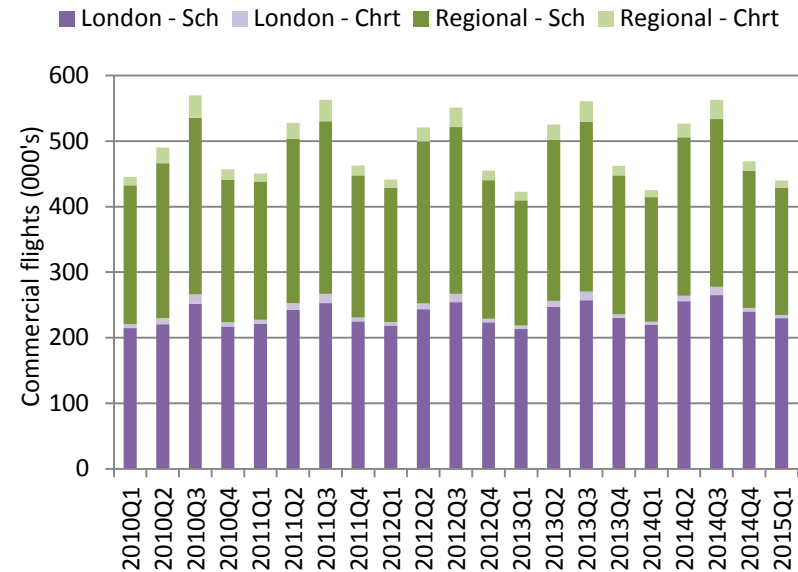
The figures in this table are for commercial passenger flights and thus exclude air freighter flights (those carrying cargo only).

The number of total passenger flights at all UK airports increased by 3.4% when compared to the same quarter last year.

There were 3.5% more scheduled flights and 1.1% more charter flights compared to the same quarter last year.

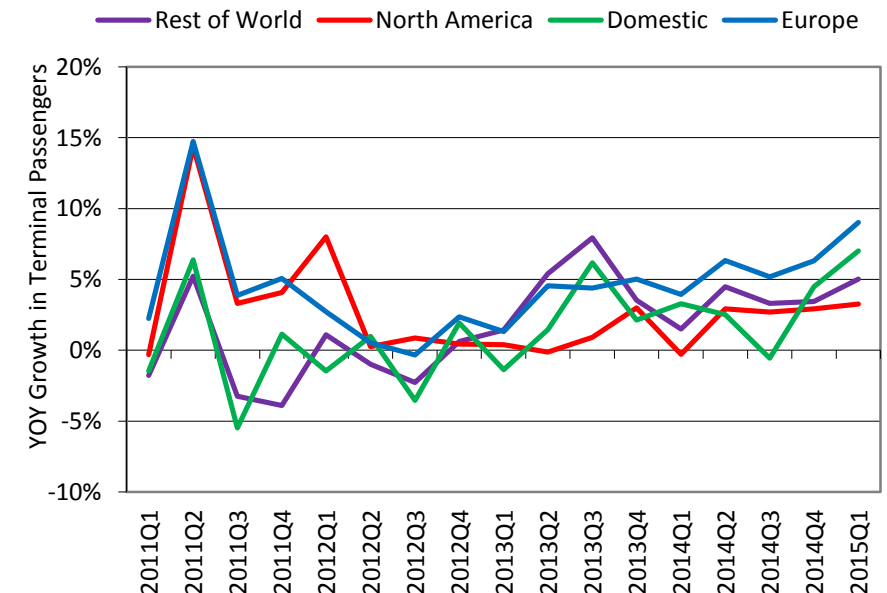
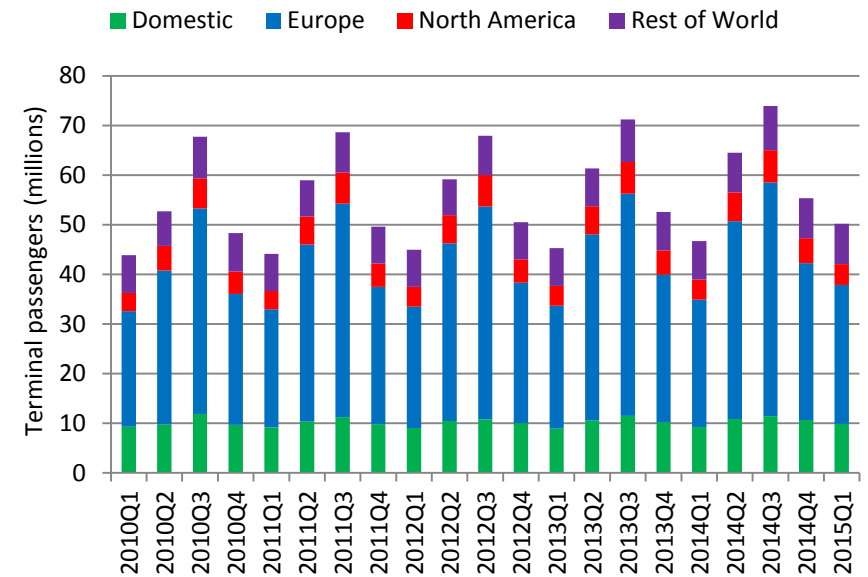
On a rolling year basis, the number of scheduled passenger flights was up by 1.6% and the number of charter passenger flights was down by 4.2%.

There were 4.4% more passenger flights at the London airports and 2.3% more passenger flights at regional airports in when compared to the same quarter last year. On a rolling year basis, the number of flights was up by 3.6% at the London airports and down by 1.1% at the regional airports.



4. Terminal passengers at UK airports by origin/destination see note 5 on p.15

Passengers (millions)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2015		Q1 2014			Q2 14 - Q1 15		Q2 13 - Q1 14		
	Pax (Mill)	% of total	Pax (Mill)	% of total	% chg	Pax (Mill)	% of total	Pax (Mill)	% of total	% chg
Domestic	9.9	20%	9.2	20%	7.0%	42.8	18%	41.5	18%	3.1%
- Scheduled	9.7	19%	9.1	19%	7.2%	42.3	17%	41.0	18%	3.2%
- Charter	0.1	0%	0.1	0%	-5.2%	0.5	0%	0.5	0%	1.1%
Europe	28.1	56%	25.7	55%	9.0%	146.6	60%	137.7	59%	6.4%
- Scheduled	26.6	53%	24.2	52%	9.7%	132.9	55%	123.1	53%	8.0%
- Charter	1.5	3%	1.5	3%	-2.5%	13.7	6%	14.6	6%	-6.4%
North America	4.1	8%	4.0	9%	3.3%	21.5	9%	20.9	9%	2.9%
- Scheduled	4.1	8%	4.0	9%	3.2%	21.3	9%	20.7	9%	2.9%
- Charter	0.0	0%	0.0	0%	0.0%	0.2	0%	0.2	0%	7.4%
Rest of World	8.1	16%	7.7	17%	5.0%	33.0	14%	31.7	14%	4.0%
- Scheduled	7.4	15%	7.1	15%	4.3%	29.9	12%	28.6	12%	4.8%
- Charter	0.7	1%	0.6	1%	13.2%	3.0	1%	3.1	1%	-2.8%
All Airports	50.2	100%	46.7	100%	7.5%	243.9	100%	231.8	100%	5.2%
- Scheduled	47.9	95%	44.4	95%	7.7%	226.5	93%	213.4	92%	6.1%
- Charter	2.3	5%	2.3	5%	2.0%	17.4	7%	18.4	8%	-5.4%



Compared to the same quarter last year, total passengers increased by 7.5% across all UK reporting airports. All regions have experienced an increase in passenger numbers. There were 7.0% more passengers travelling to domestic destinations, 9.0% more passengers travelling to Europe, 3.3% more passengers travelling to North America, and 5.0% more passengers travelling to the rest of the world.

On a rolling year basis, the total number of passengers was up by 5.2%. This was made up of an increase of 6.4%, 2.9% and 4.0% of passengers travelling to and from Europe, North America and Rest of the World respectively, and a 3.1% increase in domestic traffic.

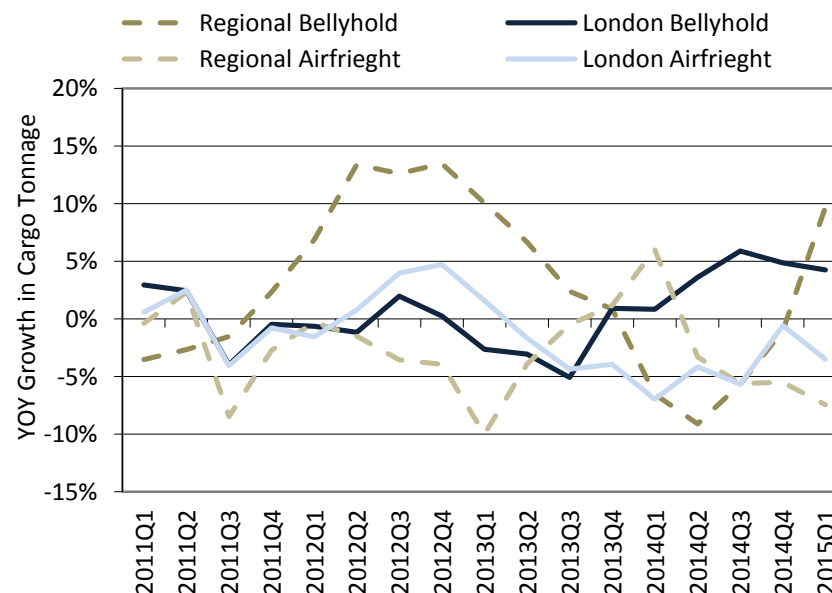
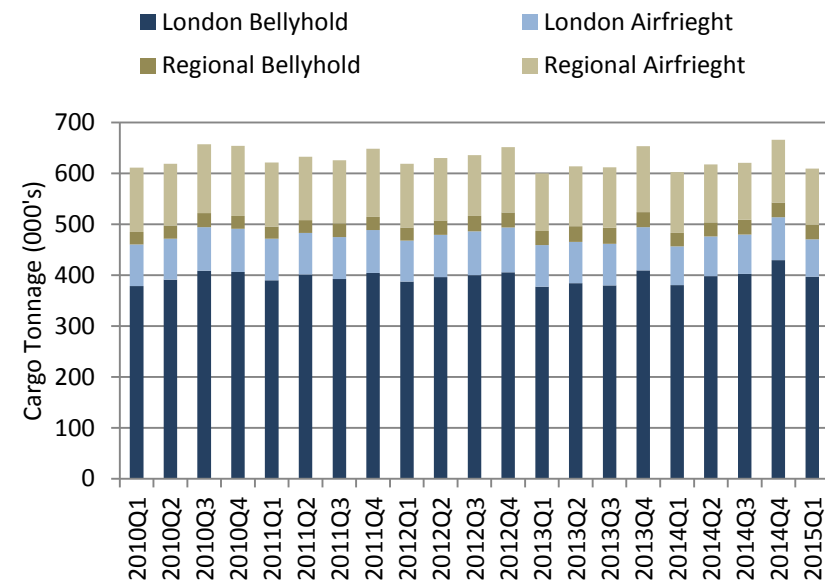
5. Air cargo tonnes carried to and from UK airports see note 5 on p.15

Tonnes (000's)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2015		Q1 2014			Q2 14 - Q1 15		Q2 13 - Q1 14		
	Tonnes (000's)	% of total	Tonnes (000's)	% of total	% chg	Tonnes (000's)	% of total	Tonnes (000's)	% of total	% chg
Cargo only flights	184.4	30%	196.0	33%	-5.9%	772.3	31%	810.1	33%	-4.7%
- London	73.6	12%	76.2	13%	-3.5%	312.8	12%	324.0	13%	-3.4%
- Regional	110.9	18%	119.8	20%	-7.4%	459.5	18%	486.0	20%	-5.5%
Bellyhold cargo	425.4	70%	406.7	67%	4.6%	1742.6	69%	1672.5	67%	4.2%
- London	397.0	65%	380.8	63%	4.2%	1627.6	65%	1555.1	63%	4.7%
- Regional	28.5	5%	26.0	4%	9.7%	115.1	5%	117.4	5%	-2.0%
Total cargo	609.9	100%	602.7	100%	1.2%	2515.0	100%	2482.6	100%	1.3%
- London	470.5	77%	457.0	76%	3.0%	1940.4	77%	1879.2	76%	3.3%
- Regional	139.4	23%	145.8	24%	-4.4%	574.5	23%	603.4	24%	-4.8%

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

Total cargo tonnage at all UK airports was up 1.2% compared with the same quarter last year. This consisted of an increase of 3.0% at London airports and a decrease of 4.4% at regional airports. Whilst air freighter tonnage decreased by 5.9%, bellyhold cargo tonnage increased by 4.6% compared with the same quarter last year.

On a rolling year basis, total cargo tonnage handled at UK airports was up by 1.3% compared with the year before, driven by a 4.2% increase in bellyhold cargo tonnage and a 4.7% reduction in air freighter cargo tonnage.



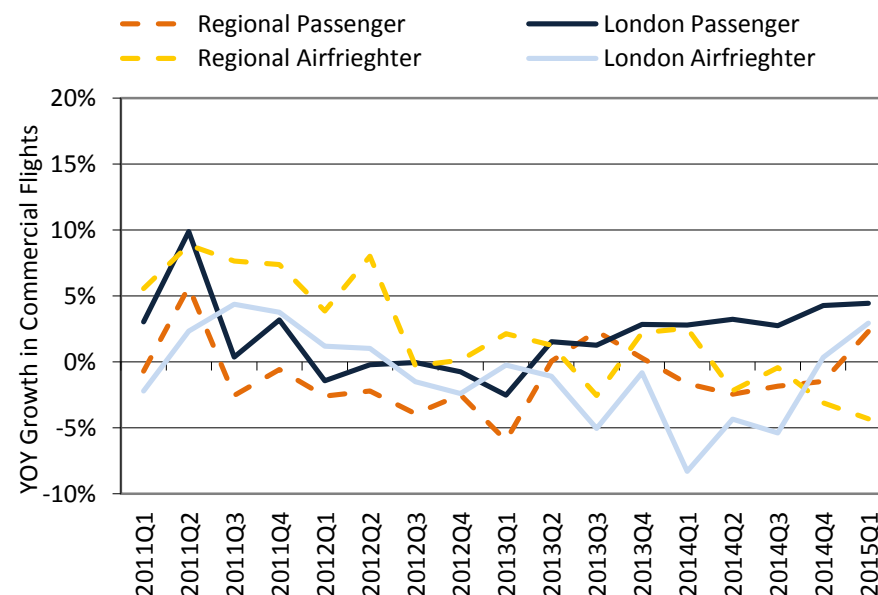
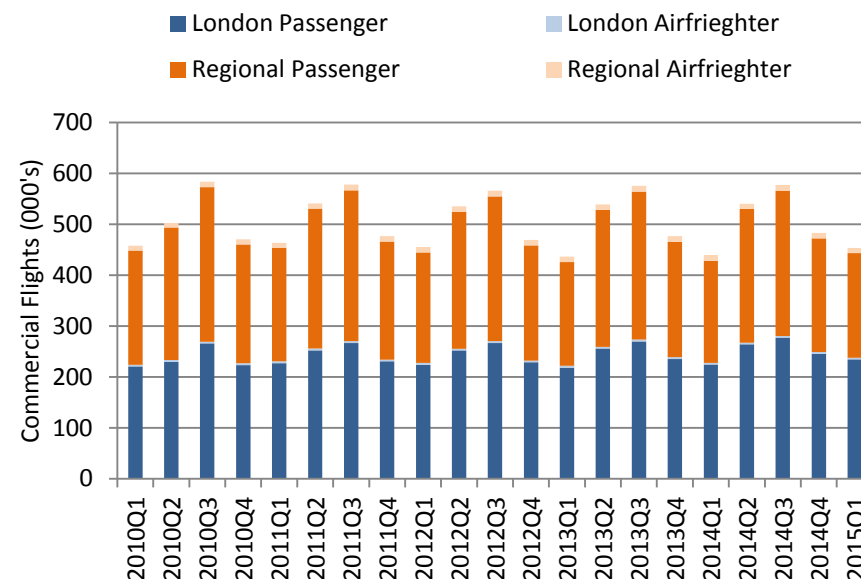
6. All commercial flights to and from UK airports see note 5 on p.15

Flights (000s)	CURRENT QUARTER					ROLLING YEAR				
	Q1 2015		Q1 2014			Q2 14 - Q1 15		Q2 13 - Q1 14		
	Flights (000's)	% of total	Flights (000's)	% of total	% chg	Flights (000's)	% of total	Flights (000's)	% of total	% chg
Airfreighter	13.8	3%	14.2	3%	-2.7%	56.4	3%	57.7	3%	-2.3%
- London	3.3	1%	3.2	1%	2.9%	13.3	1%	13.6	1%	-1.7%
- Regional	10.5	2%	11.0	3%	-4.3%	43.0	2%	44.1	2%	-2.5%
Passenger flights	440.1	97%	425.5	97%	3.4%	1999.0	97%	1974.0	97%	1.3%
- London	234.6	52%	224.7	51%	4.4%	1022.1	50%	986.4	49%	3.6%
- Regional	205.4	45%	200.8	46%	2.3%	977.0	48%	987.6	49%	-1.1%
Total flights	453.9	100%	439.6	100%	3.2%	2055.4	100%	2031.7	100%	1.2%
- London	237.9	52%	227.8	52%	4.4%	1035.4	50%	999.9	49%	3.5%
- Regional	216.0	48%	211.8	48%	2.0%	1020.0	50%	1031.7	51%	-1.1%

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.

The total number of commercial flights in the UK was up 3.2% compared to the same quarter last year – the combined effect of a 3.4% increase in the number of passenger flights and a 2.7% reduction in the number of freighter flights. The London airports saw an overall increase of 4.4% in the total number of flights and the regional airports experienced an increase of 2.0%.

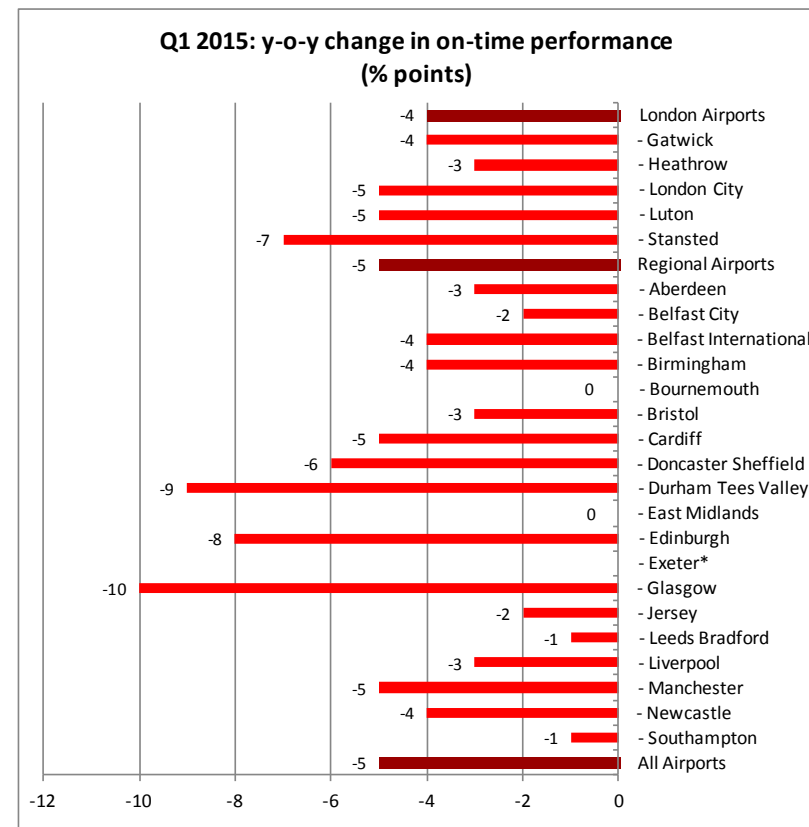
On a rolling year basis, the total number of commercial flights was up 1.2% compared with the year before, driven by 3.5% growth at London airports. Commercial flights at regional airports declined by 1.1% over the same period.



7. Punctuality of scheduled passenger flights to and from UK airports see note 6 on p.15

a. On-time performance

Matched scheduled passenger flights (000s), % of flights on-time	Q1 2015		Q1 2014		Change (% points)
	Flights (000s)	% on-time	Flights (000s)	% on-time	
London Airports	227.5	80%	217.5	84%	-4
- Gatwick	49.9	79%	48.9	83%	-4
- Heathrow	111.0	79%	111.4	82%	-3
- London City	20.3	85%	16.4	90%	-5
- Luton	15.3	80%	13.7	85%	-5
- Stansted	31.0	79%	27.2	86%	-7
Regional Airports	168.2	81%	158.1	86%	-5
- Aberdeen	13.0	82%	13.0	85%	-3
- Belfast City	9.1	84%	7.8	86%	-2
- Belfast International	6.5	87%	6.8	91%	-4
- Birmingham	18.3	82%	16.4	86%	-4
- Bournemouth	0.3	76%	0.4	76%	0
- Bristol	9.6	83%	9.7	86%	-3
- Cardiff	2.1	80%	2.5	85%	-5
- Doncaster Sheffield	0.6	79%	0.4	85%	-6
- Durham Tees Valley	0.9	83%	1.0	92%	-9
- East Midlands	5.4	86%	5.0	86%	0
- Edinburgh	21.3	81%	19.5	89%	-8
- Exeter*	2.3	83%			
- Glasgow	15.9	79%	14.3	89%	-10
- Jersey	4.7	78%	6.1	80%	-2
- Leeds Bradford	5.9	82%	4.9	83%	-1
- Liverpool	6.5	83%	6.6	86%	-3
- Manchester	30.7	79%	29.1	84%	-5
- Newcastle	7.4	83%	7.6	87%	-4
- Southampton	7.8	82%	7.2	83%	-1
All Airports	395.7	80%	375.6	85%	-5



Punctuality of arriving and departing passenger flights is measured by comparing actual and planned times of operation. The data covers twenty-four airports.

On-time performance is defined as the proportion of flights arriving or departing early or up to and including 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.

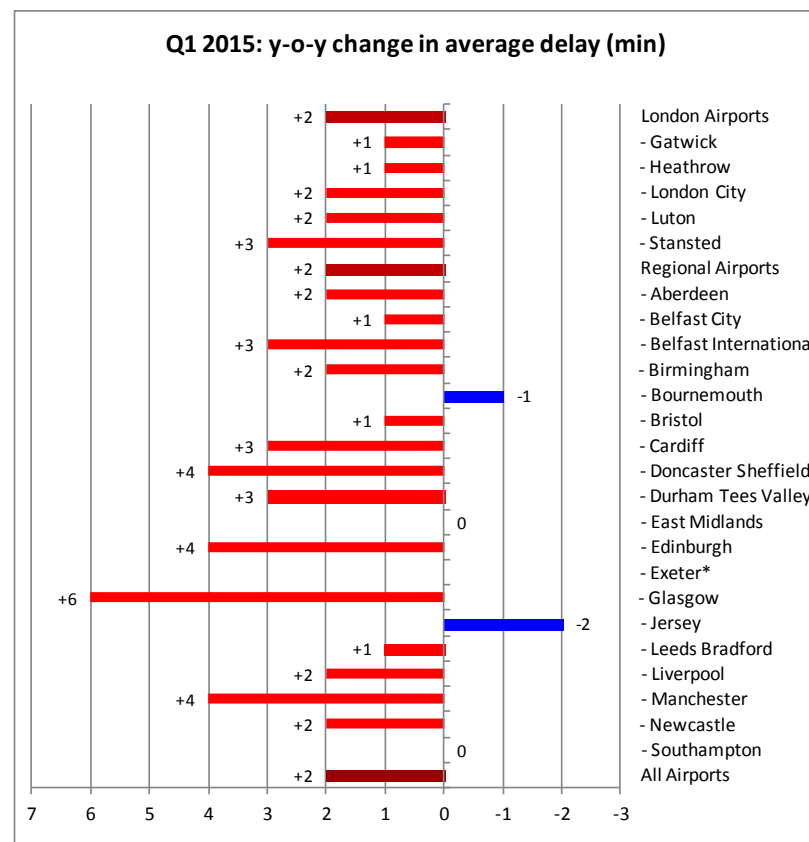
In Q1 2015, 80% of flights were on time, down by 5 percentage points against Q1 2014. The erosion in percentage of on-time performance compared with the same quarter in 2014 affected all the monitored airports, with the exception of East Midlands and Bournemouth, whose punctuality was unchanged.

* Exeter data only available from November 2014

b. Average delay

Matched scheduled passenger flights (000s), Average Delay (min)	Q1 2015		Q1 2014		Change in Avg. delay (min)
	Flights (000s)	Avg. Delay (min)	Flights (000s)	Avg. Delay (min)	
London Airports	227.5	12	217.5	10	+2
- Gatwick	49.9	11	48.9	10	+1
- Heathrow	111.0	12	111.4	11	+1
- London City	20.3	8	16.4	6	+2
- Luton	15.3	11	13.7	9	+2
- Stansted	31.0	11	27.2	8	+3
Regional Airports	168.2	11	158.1	9	+2
- Aberdeen	13.0	11	13.0	9	+2
- Belfast City	9.1	10	7.8	9	+1
- Belfast International	6.5	8	6.8	5	+3
- Birmingham	18.3	11	16.4	9	+2
- Bournemouth	0.3	11	0.4	12	-1
- Bristol	9.6	10	9.7	9	+1
- Cardiff	2.1	13	2.5	10	+3
- Doncaster Sheffield	0.6	12	0.4	8	+4
- Durham Tees Valley	0.9	10	1.0	7	+3
- East Midlands	5.4	9	5.0	9	0
- Edinburgh	21.3	11	19.5	7	+4
- Exeter*	2.3	11			
- Glasgow	15.9	13	14.3	7	+6
- Jersey	4.7	15	6.1	17	-2
- Leeds Bradford	5.9	12	4.9	11	+1
- Liverpool	6.5	10	6.6	8	+2
- Manchester	30.7	13	29.1	9	+4
- Newcastle	7.4	10	7.6	8	+2
- Southampton	7.8	12	7.2	12	0
All Airports	395.7	11	375.6	9	+2

* Exeter data only available from November 2014



Average delay per flight across the twenty-four airports monitored was 11 minutes for Q1 2015. This represented an increase of two minutes against the same quarter last year.

Bournemouth and Jersey airports registered an improvement in average delay of one and two minutes respectively compared with Q1 2015.

Glasgow saw the biggest increase in average delay in Q1 2015 compared with the same quarter last year (+6 minutes), although this was against a relatively good performance last year (7 minutes of average delay).

8. Did you know?

Consumer research has a key role in providing insights that, in conjunction with other indicators, allow the CAA to identify the risks that consumers may face due to information and/or market imperfection, and improve our understanding of future trends and developments which may impact consumer outcomes.

As part of our commitment to taking an evidence-based approach to regulation the CAA commissioned Collaborate Research to undertake a substantial piece of qualitative and quantitative research to:

- provide insights on the behaviours, needs and concerns of consumers, including vulnerable and disadvantaged groups, and infrequent/non-flyers;
- identify areas where provision of new/additional information could facilitate more informed decisions by consumers; and
- explore the under-researched attitudes towards air travel safety and security.

Amongst a number of positive findings from the study were:

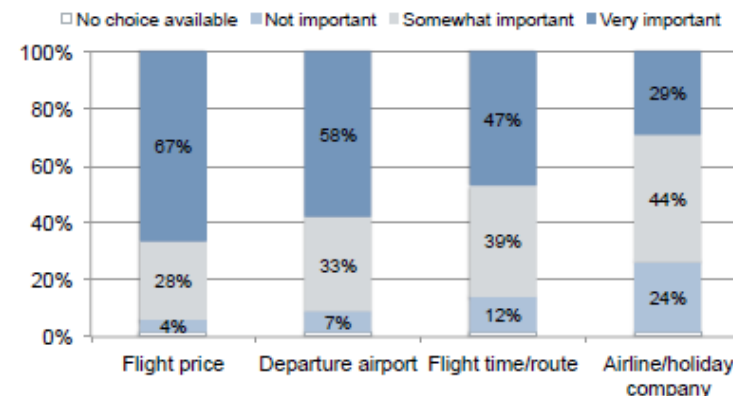
- high level of overall satisfaction;
- aviation-related issues are generally not preventing people from travelling by air;
- high levels of satisfaction reported by passengers with restricted mobility and disabilities who have requested assistance from airports/airlines; and that
- confidence in aviation safety and security standards is generally high.

However, the research findings also highlighted some issues where further research would be valuable in helping guide the CAA's response. These included:

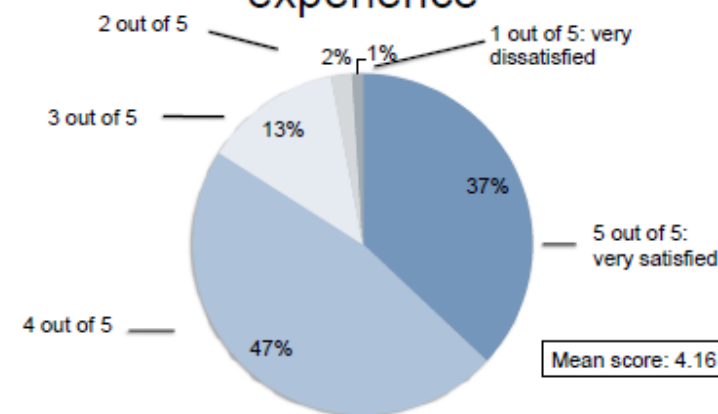
- use of price comparison websites was relatively low compared to other markets;
- consumers are not always provided with clear information that maybe important to them before, during and after their journey;
- for consumers with restricted mobility or a disability, access issues were cited as a reason for not flying by a substantial proportion (~40%), and of those who had flown in the last 12 months.

Please click on the link to the [Consumer Research Study](#) for further details.

Flight choice factors



Satisfaction with air travel experience



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, this category includes 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.