



CAA Aviation Trends Quarter 1 2024

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Report Notes

1. Welcome to the CAA's *Aviation Trends* report. Every quarter we update key metrics which summarise "commercial" aviation activity at the United Kingdom's airports. Please note that the figures may be subject to minor changes in future due to on-going adjustment, revision and updates - historic reports will not be reissued.
2. The data in this report is compiled by the CAA with the co-operation of UK airport and airline operators. Their assistance is gratefully acknowledged. More detailed data and information regarding the source(s) are available on the CAA's website: <https://www.caa.co.uk/data-and-analysis/uk-aviation-market/>
3. Since the information contained in this report has been acquired from multiple sources, it is not possible for the CAA to check and verify whether it is accurate and correct nor do we undertake to do so. Consequently the CAA cannot accept any liability caused by any person's reliance on it.
4. For the purposes of this report the Channel Islands - Jersey, Guernsey, Alderney - and the Isle of Man are considered domestic aviation and their data is included, despite not formally being part of the United Kingdom.
5. **Terminal Passengers**
 - a. Terminal passenger are travellers who board or disembark a commercial flight at a UK reporting airport. Note: domestic passengers are effectively counted twice (on boarding at one UK airport and disembarking at another) and therefore the figures displayed will not reflect the number of "onboard" passengers in the UK aviation market.
 - b. Load Factor is calculated by dividing the number of passengers on a flight by the total number of seats expressed as a percentage - i.e. reflecting the seat occupancy on flights.
6. **Air Transport Movements (ATMs)**
 - a. Similar to Terminal Passengers (above), an ATM between two UK airports - i.e. a domestic flight - will be counted twice, once on departure and on arrival at the destination airport.
 - b. Data excludes Air Taxi flights: this is charter air transport movements performed by aircraft with a Maximum Take Off Weight (MTOW) of below 15 tonnes.
7. **Cargo Tonnage** data represents freight and mail which is transported into and out of the UK on air freighters and in the belly hold of passenger aircraft. Any cargo transiting the UK is not included in the figures.
8. **Punctuality**
 - a. The CAA collects punctuality information from 25 UK airports - these are typically the largest airports in terms of movements/passengers. For the full list please visit the link below
 - b. In the punctuality data, 'delay' is recorded as the difference between an aircraft's scheduled arrival or departure time and the actual time it reaches or departs the airport gate (pre 2018 'delay' was measured as the difference between the scheduled time and a calculated time that the aircraft reached/depanded the gate by taking the time the aircraft arrived at the runway and a fixed taxi time to/from the gate (see the link below for more information).
 - c. In 2018 the CAA began formally collecting flight cancellation information from airport suppliers. Before this data was supplied to the CAA on a voluntary basis. For more information on what formally constitutes a cancellation in the CAA data, please visit the link below.
 - d. A flight is deemed to be "on-time" if it arrives or departs from the airport gate within 15 minutes of its scheduled time. The figures displayed in this report are an aggregation of UK arrival and departure punctuality.
 - e. Since the CAA only collects information from UK airports, this report contains no information about overseas punctuality. This is pertinent particularly for flights departing the UK where time may be gained (or lost) en-route and therefore the total delay experienced by passengers may vary to that published.
 - f. Average delay minutes are calculated from the total minutes of delay recorded by all flights (with early flights counted as zero minutes delay) divided by the total number of flights operated.
 - g. More details regarding CAA punctuality statistics can be found here: <https://www.caa.co.uk/data-and-analysis/uk-aviation-market/flight-punctuality/uk-flight-punctuality-statistics/>
9. As some of the trends in this report are long term (30+ years), not all airports consistently reported to the CAA over this period - particularly regarding punctuality dataset. Therefore these figures should be used as a guide of national performance and not necessarily the precise results.

Key performance indicators - Q1 2024 (vs 2023)

Passengers



58.7M

+11%pt

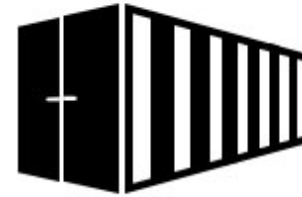
Flights (ATM's)



443K

+6%pt

Cargo Tonnage



630K

+18%pt

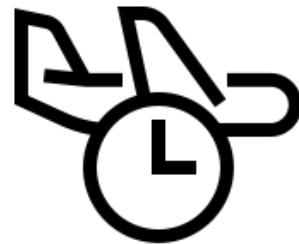
Load Factor



78%

+1%pt

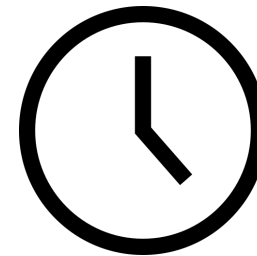
Flights On Time*



76%

+5%pt

Average Delay



13min

-4min

The figures on the left show the number of passengers, air transport movements (ATMs) and cargo volumes for the quarter. The load factor (the percentage of seats occupied on flights) and punctuality metrics are also displayed.

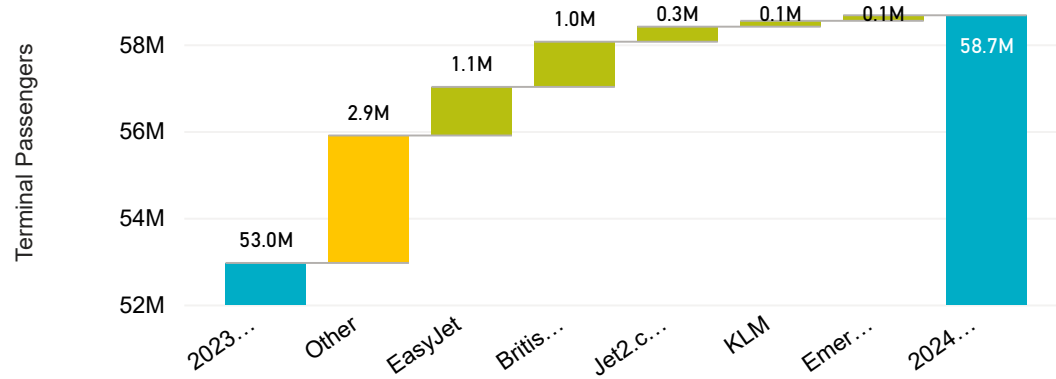
The text in green or red show growth rates relative to the same period last year.

* A flight is considered "on time" if it arrives or departs the gate within 15 minutes of the scheduled time.

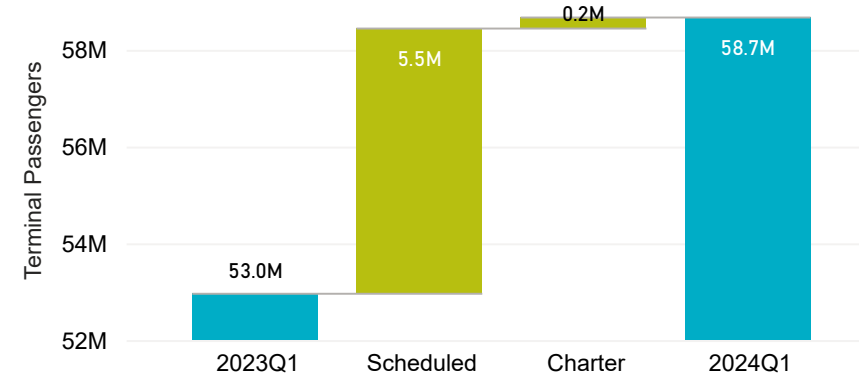
Terminal passengers Q1 2024

Year-on-year comparison

Terminal passengers by airline

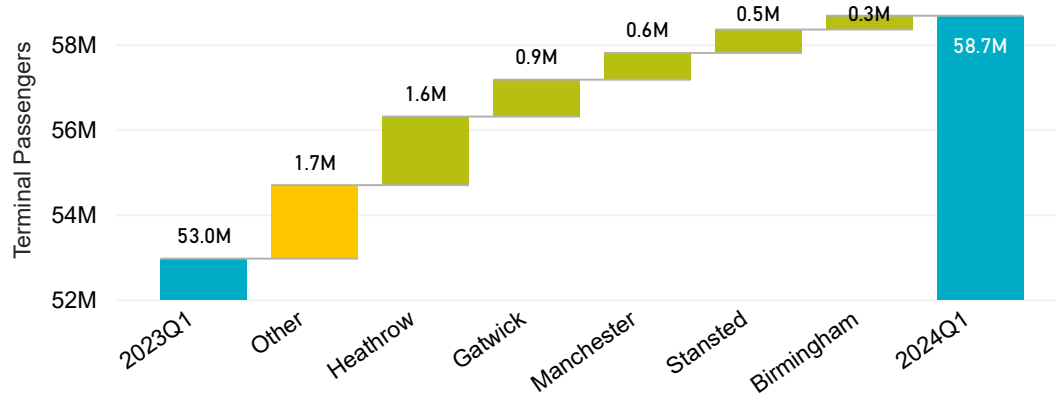


Terminal passengers by scheduled & charter services

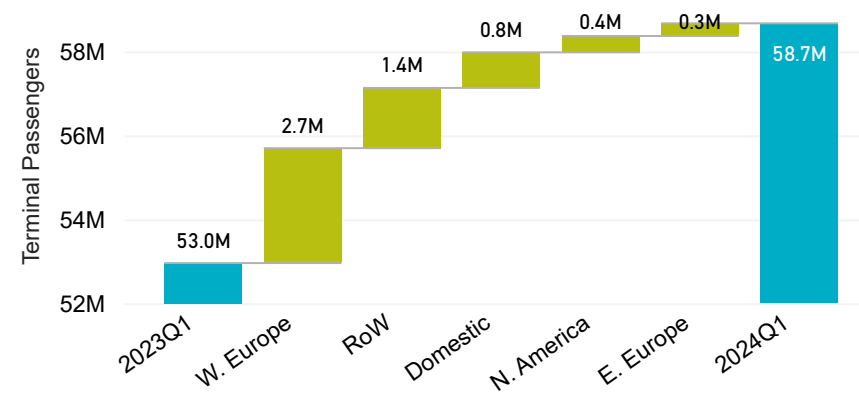


The number of terminal passengers in Q1 was 58.7M up from 53.0M in the same period last year.

Terminal passengers by reporting airport



Terminal passengers by market

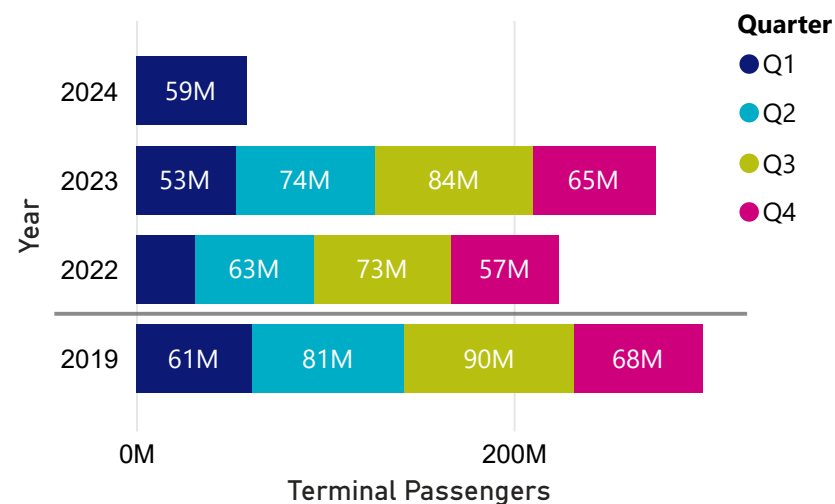


The charts on this page show the distribution of passenger growth across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

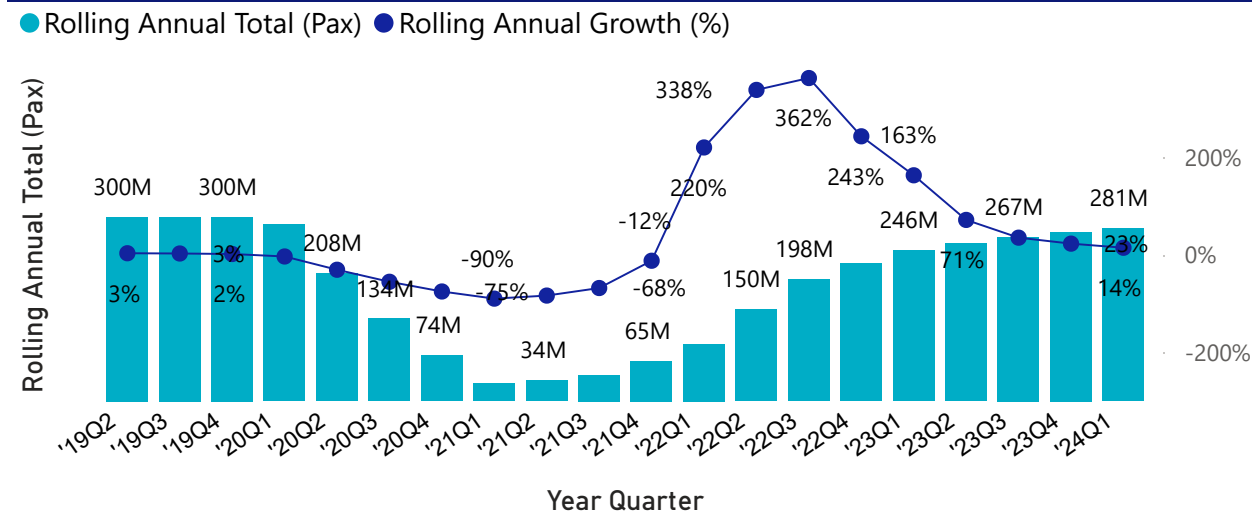
Terminal passengers

5 Year Trend

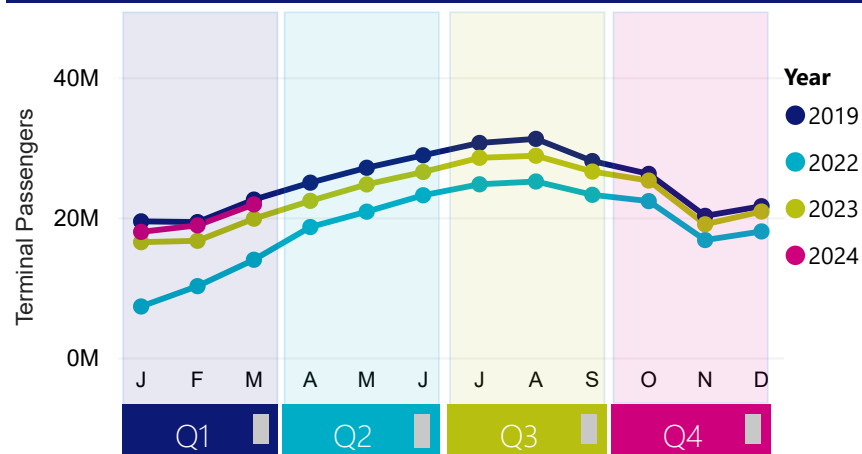
Quarterly



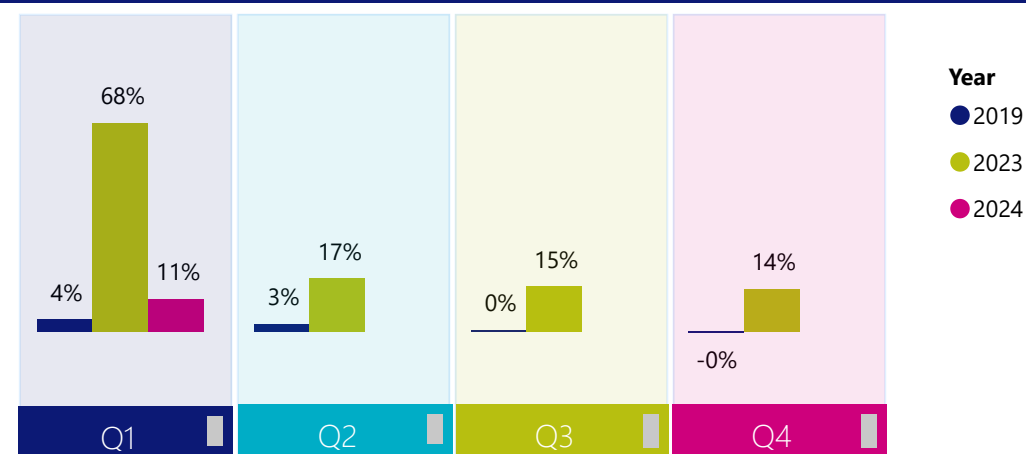
Rolling 12-month total



Monthly



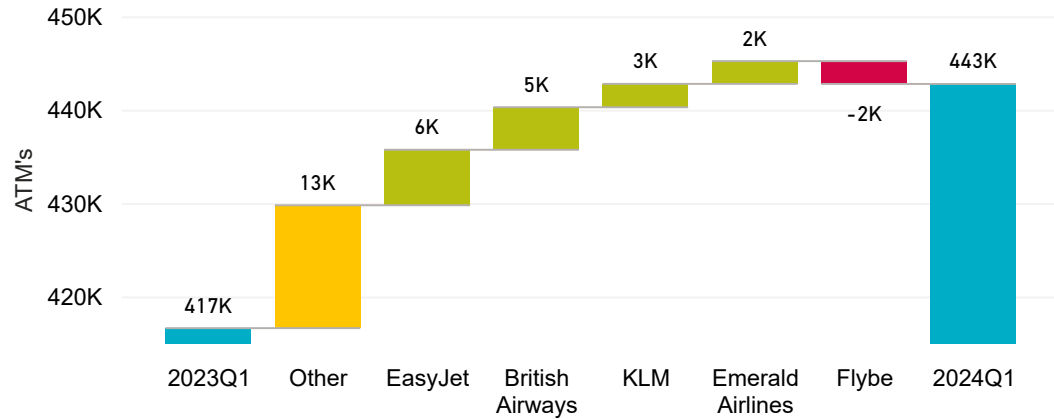
Year-on-year % Variance



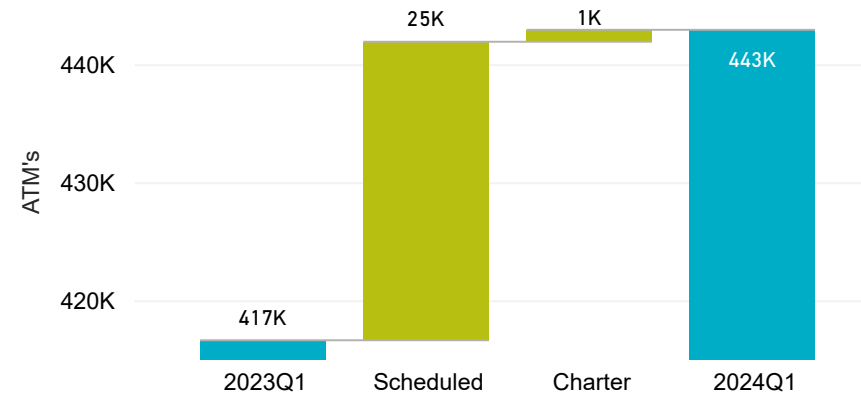
Air Transport Movements (ATM's) - Q1 2024

Year-on-year comparison

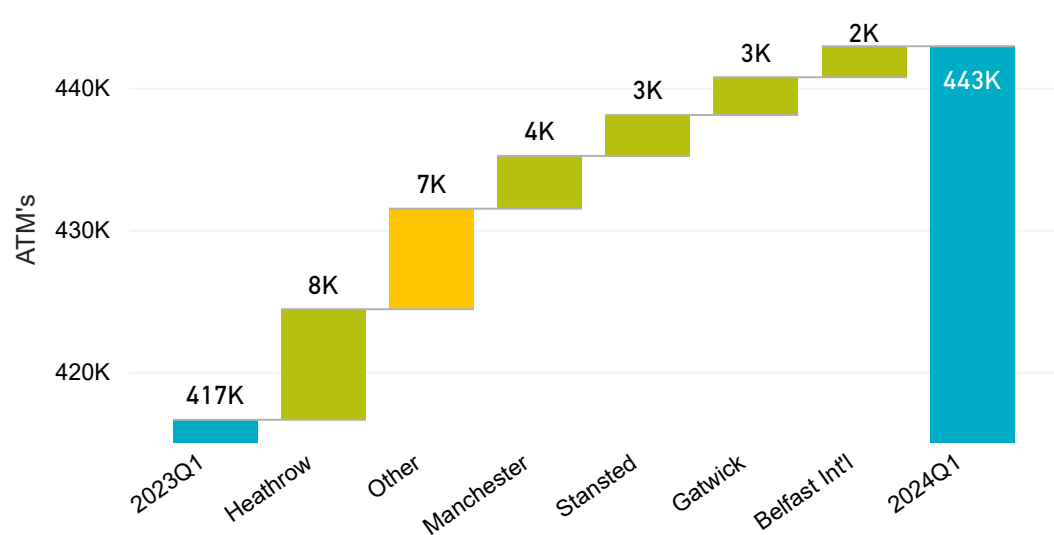
ATM's by airline



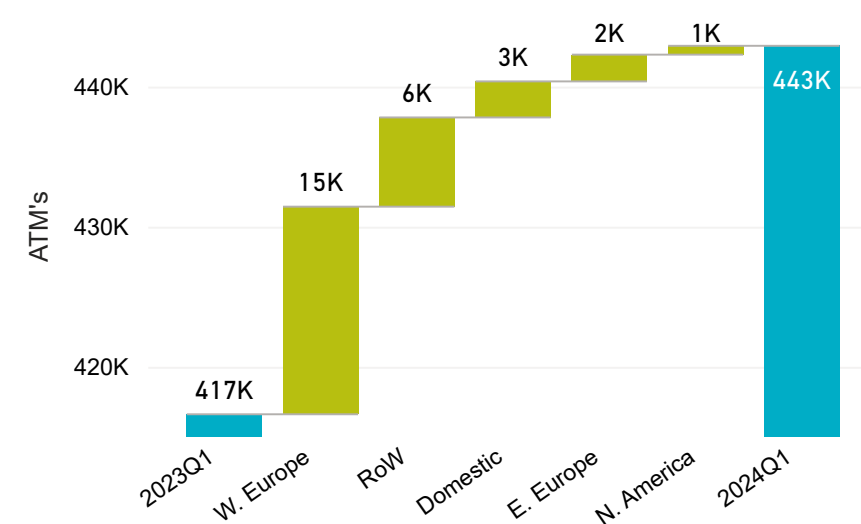
ATM's by scheduled & charter operation



ATM's by reporting airport



ATM's by market



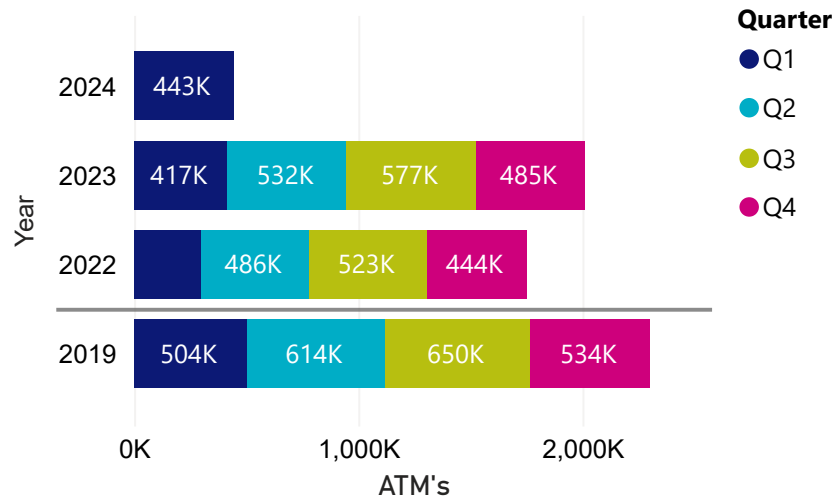
The number of ATM's in Q1 was 442.9K up from 416.6K in the same period last year.

The charts on this page show how ATM growth is distributed across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

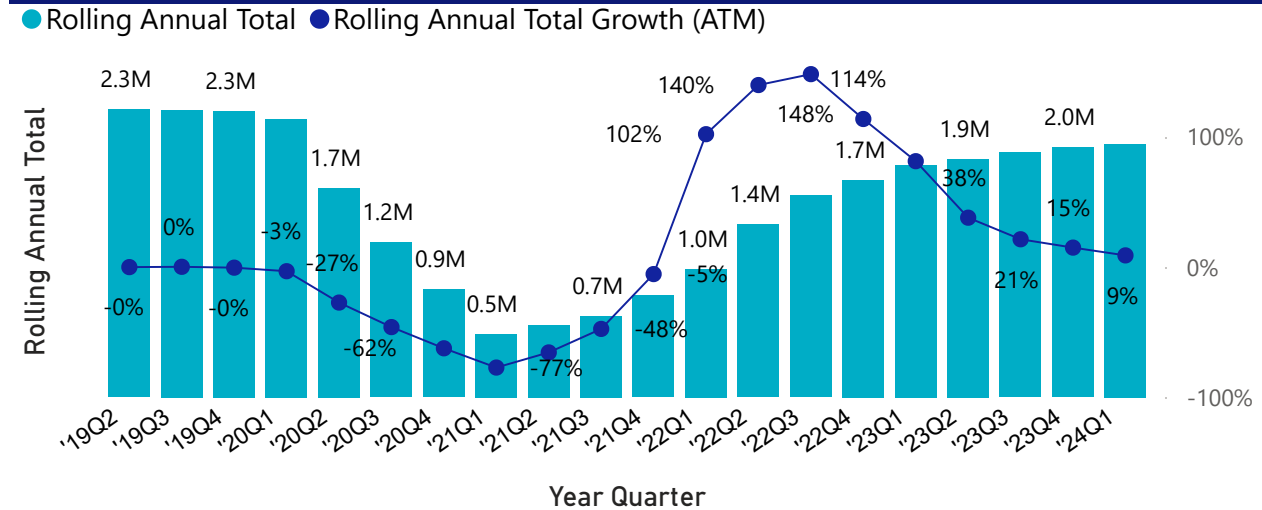
Air Transport Movements (ATM's)

5 Year Trend

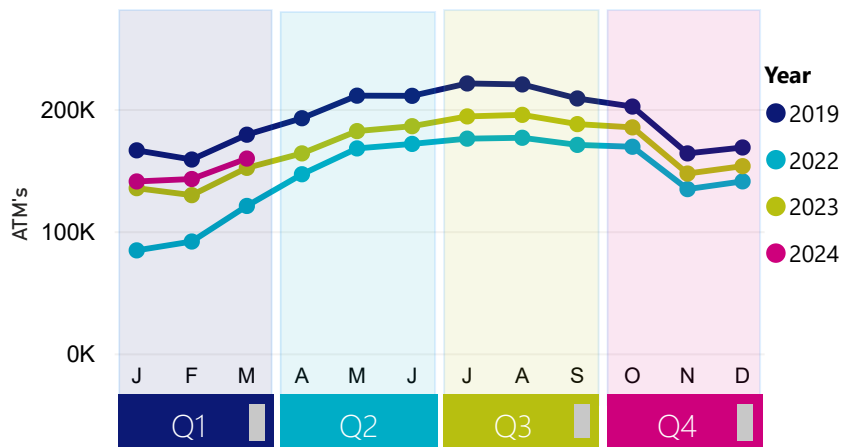
Quarterly



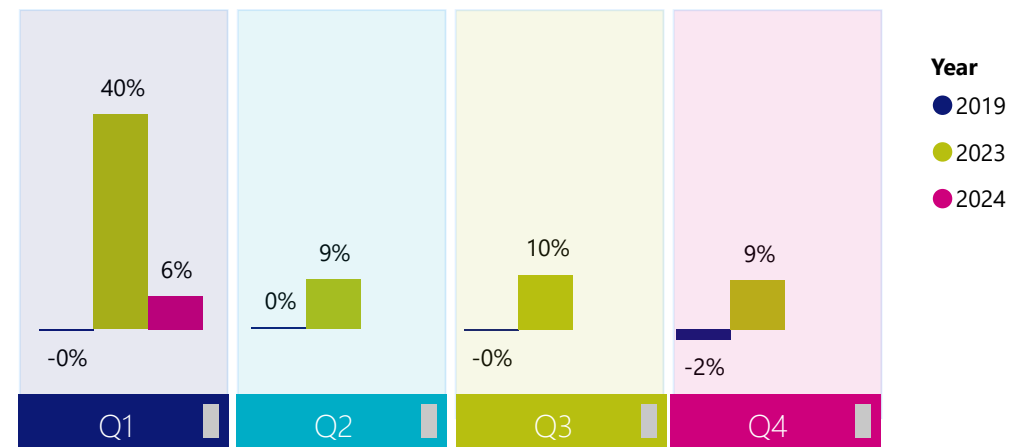
Rolling 12-month total



Monthly



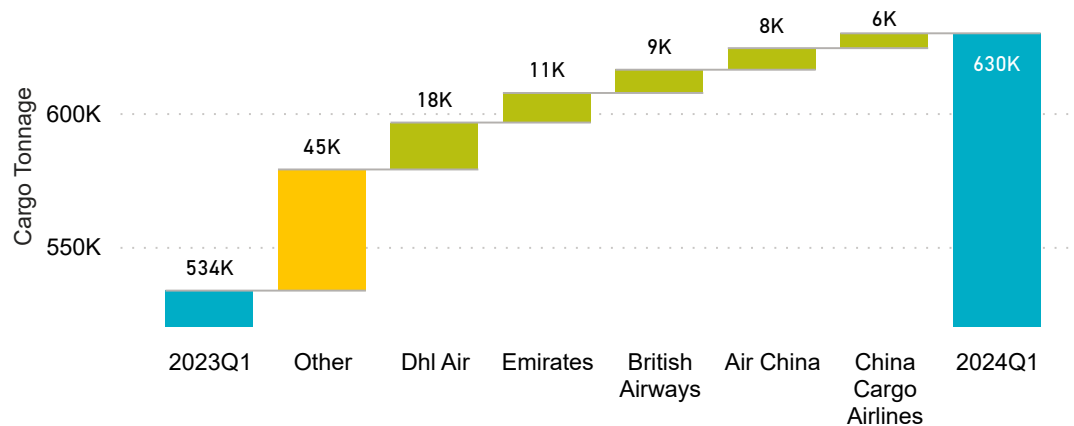
Year-on-year % Variance



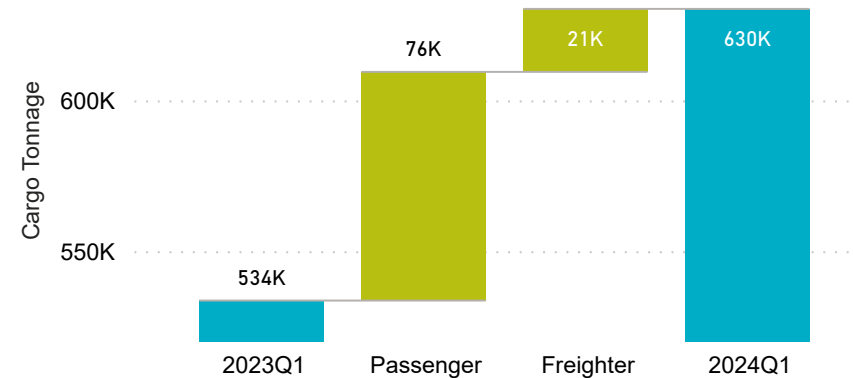
Cargo Tonnage - Q1 2024

Year-on-year comparison

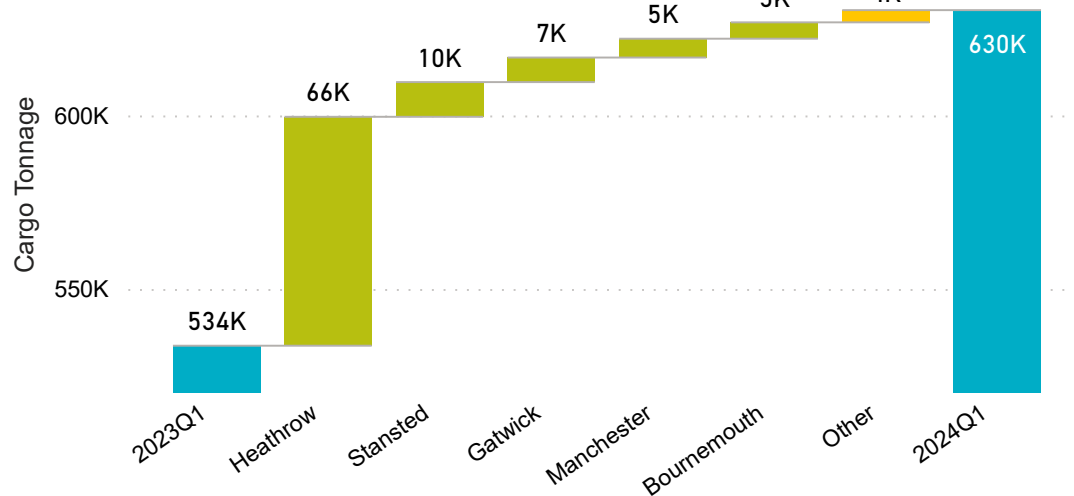
Cargo tonnage by airline



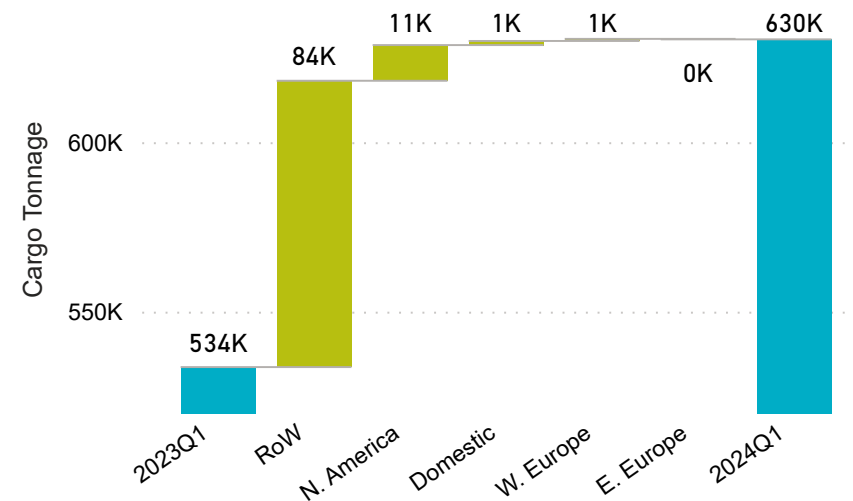
Cargo tonnage by passenger & freighter services



Cargo tonnage by reporting airport



Cargo tonnage by market



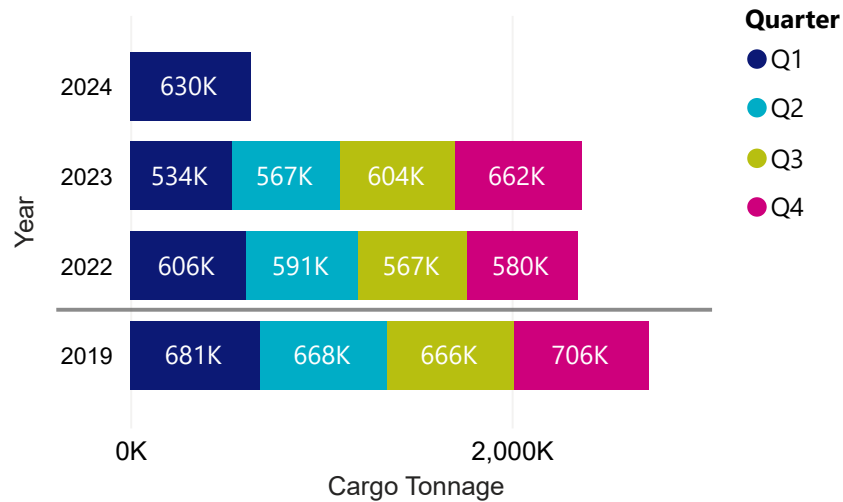
Cargo Tonnage in Q1 was 630.4K up from 533.7K in the same period last year.

The charts on this page show how cargo tonnage growth is distributed across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

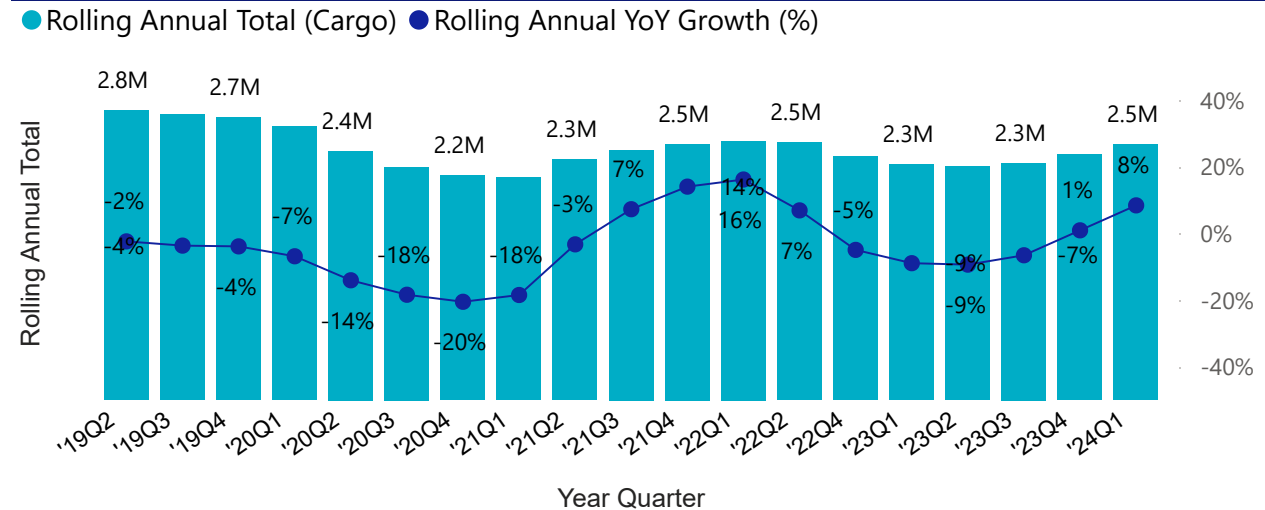
Cargo Tonnage

5 Year Trend

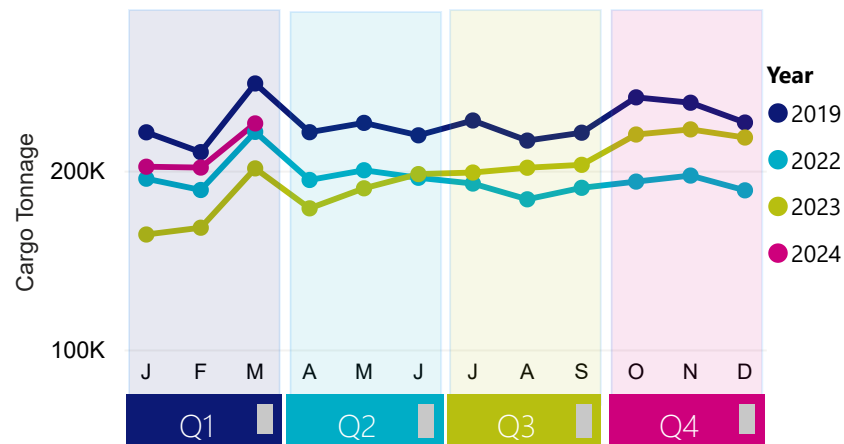
Quarterly



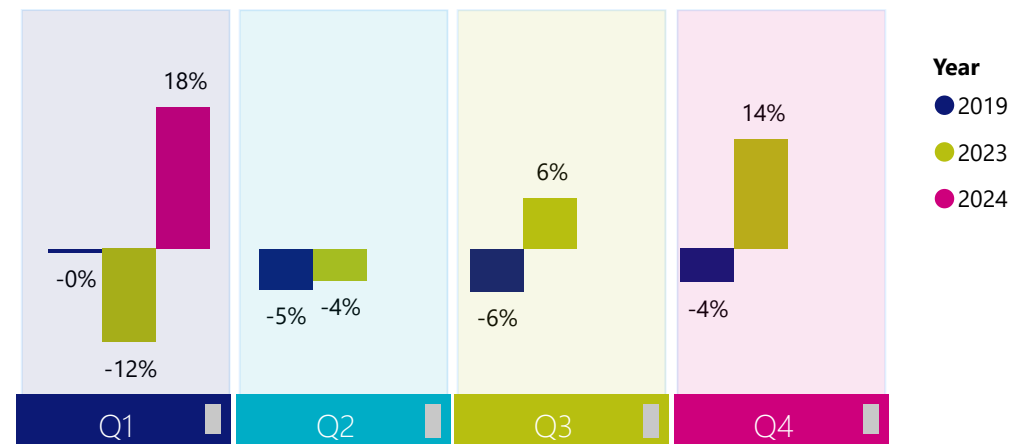
Rolling 12-month total



Monthly



Year-on-year % Variance

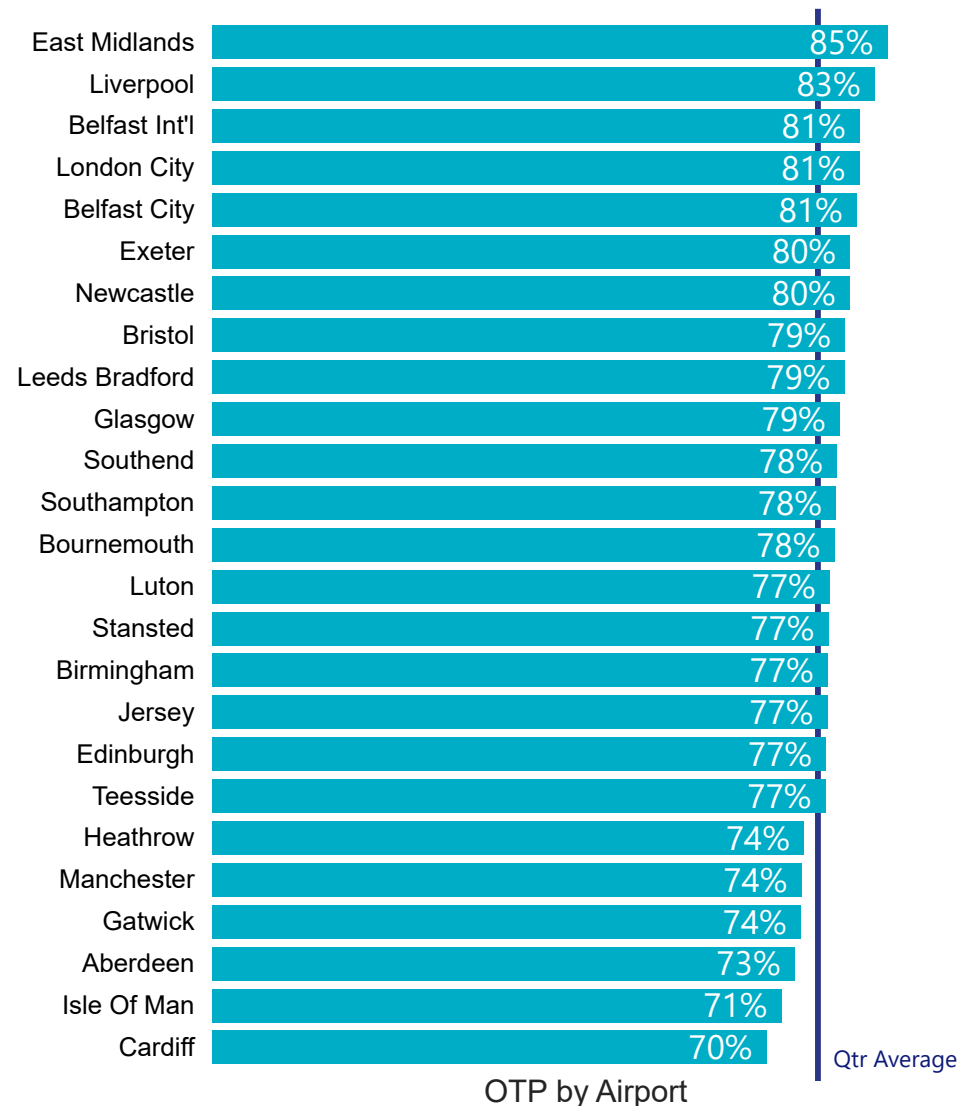


Flight Punctuality - Q1 2024 (UK Arrivals & Departures)

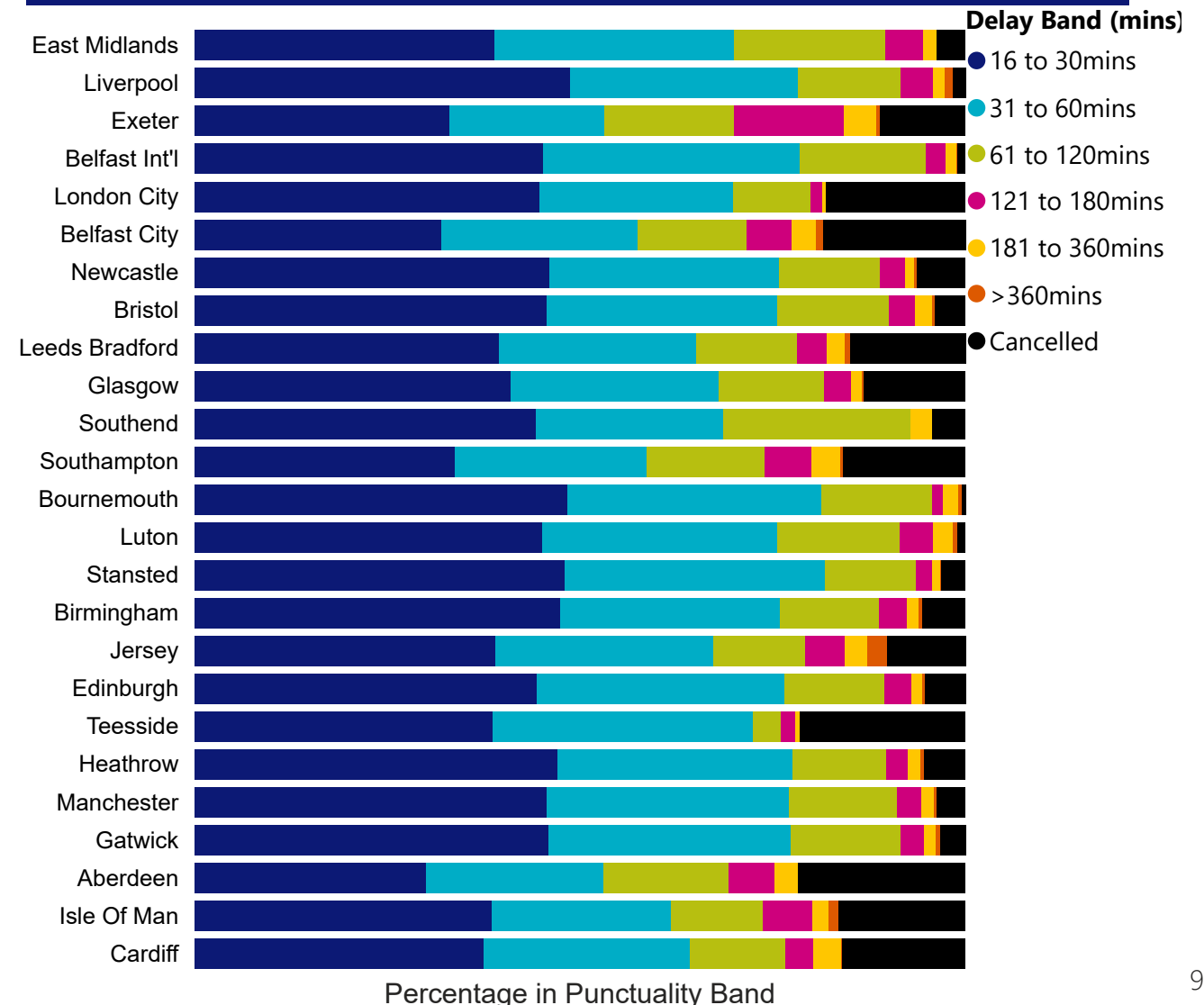
CAA (UK) reporting airports



Percentage of flights on time (<15mins)

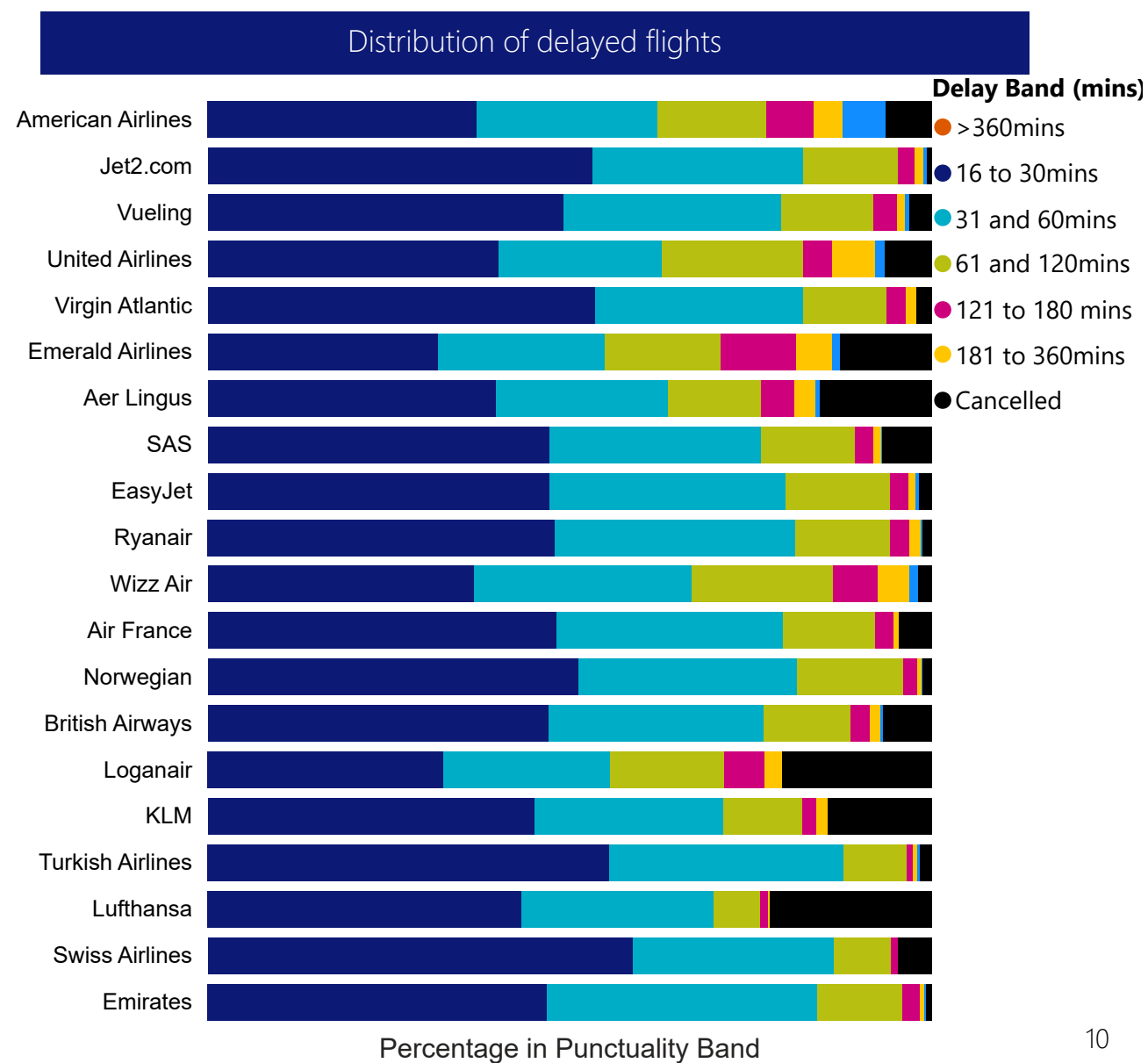
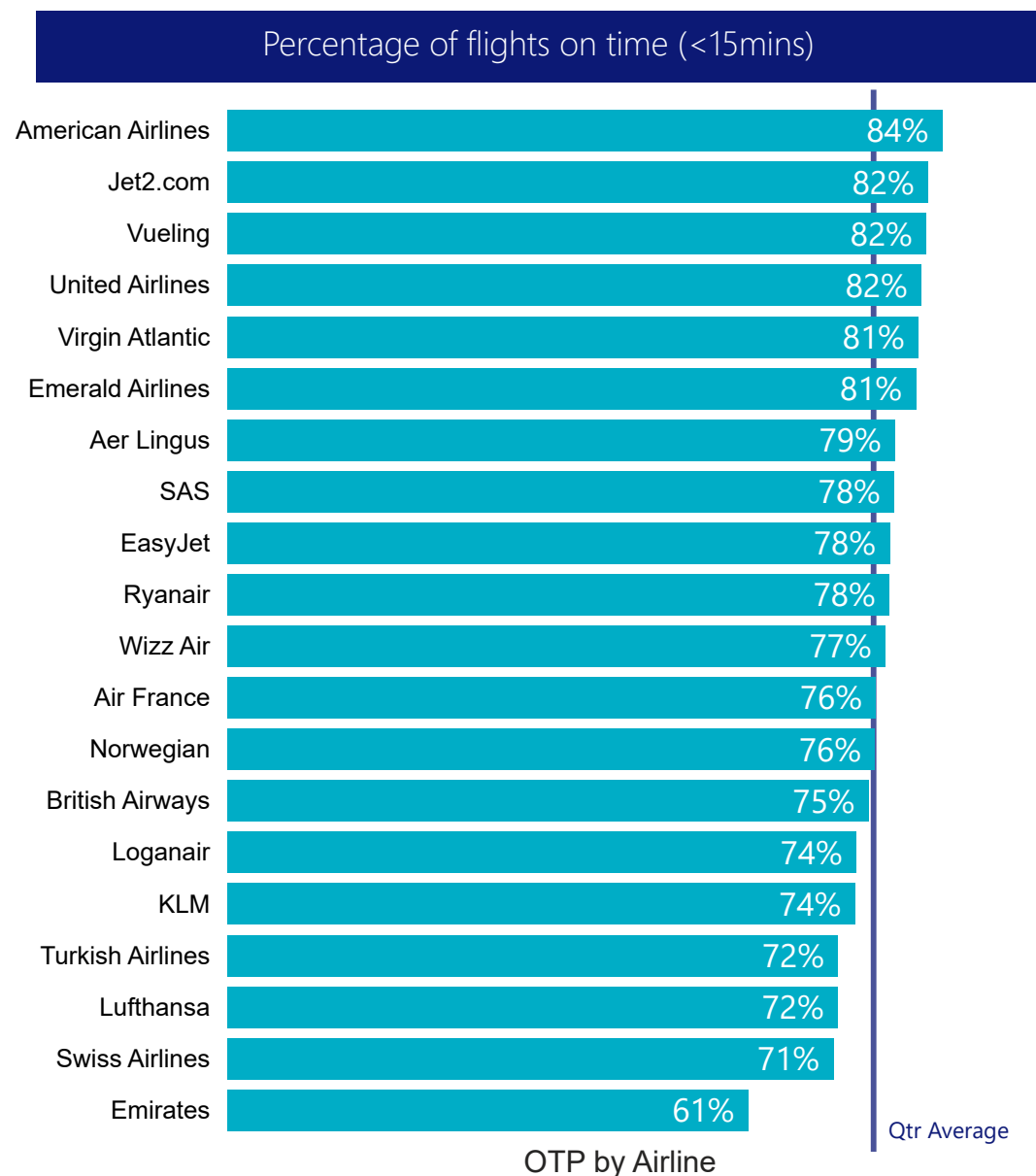


Distribution of delayed flights



Flight Punctuality - Q1 2024 (UK Arrivals & Departures)

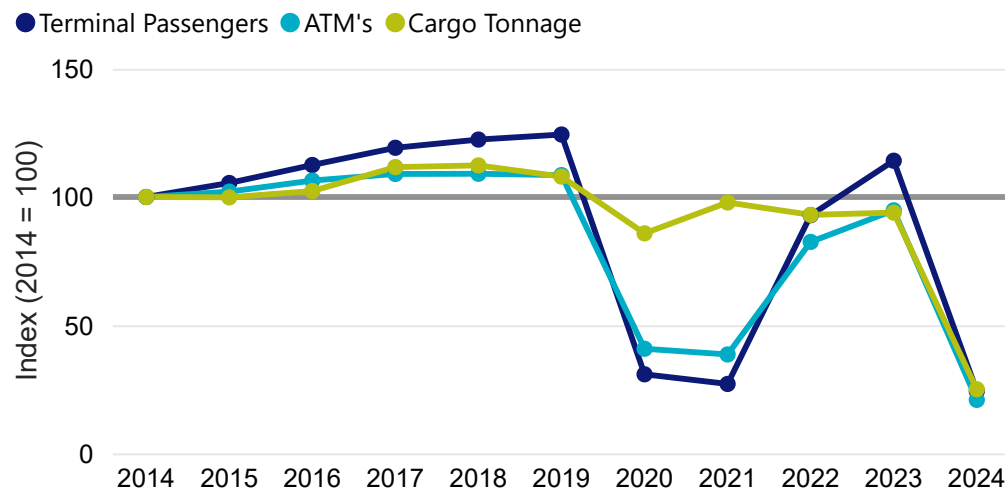
Top 20 largest airlines by ATM's



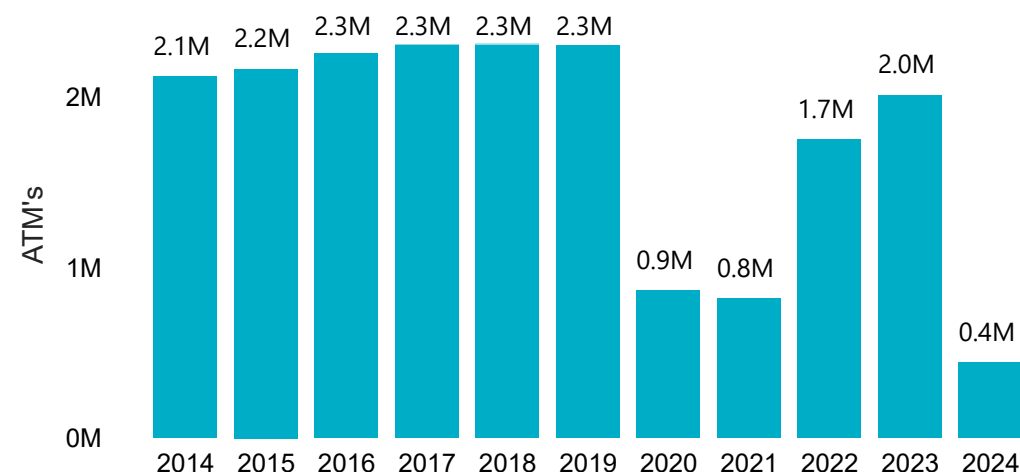
10 year trends

Terminal Passengers, Air Transport Movements (ATM) and Cargo Tonnage (NB: 2024 values are year-to-date and will update throughout the year)

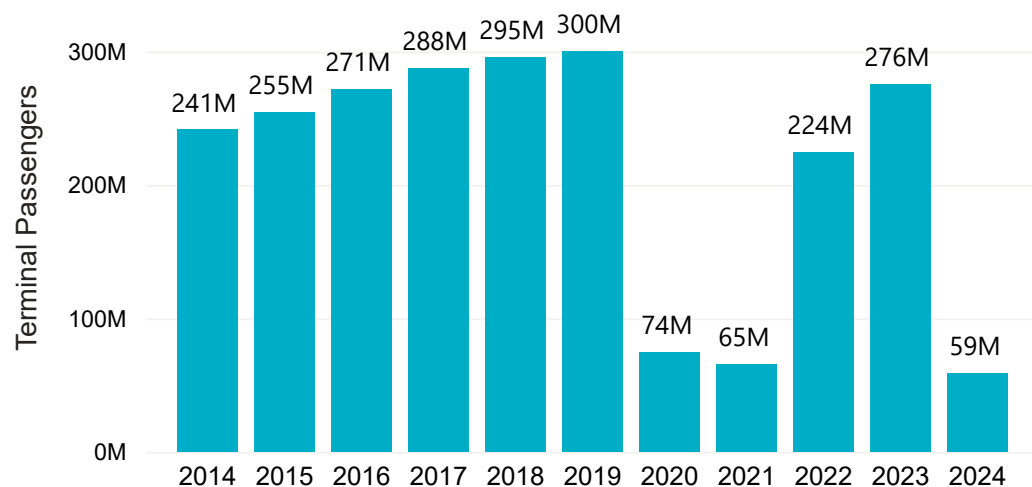
Indexed passenger, ATM and cargo growth (2014 = 100)



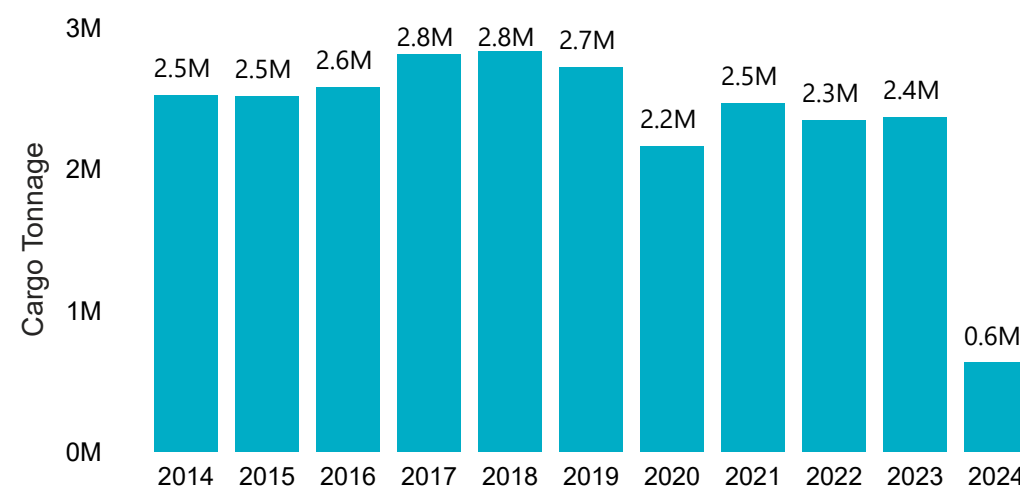
ATM's (millions)



Terminal passengers (millions)



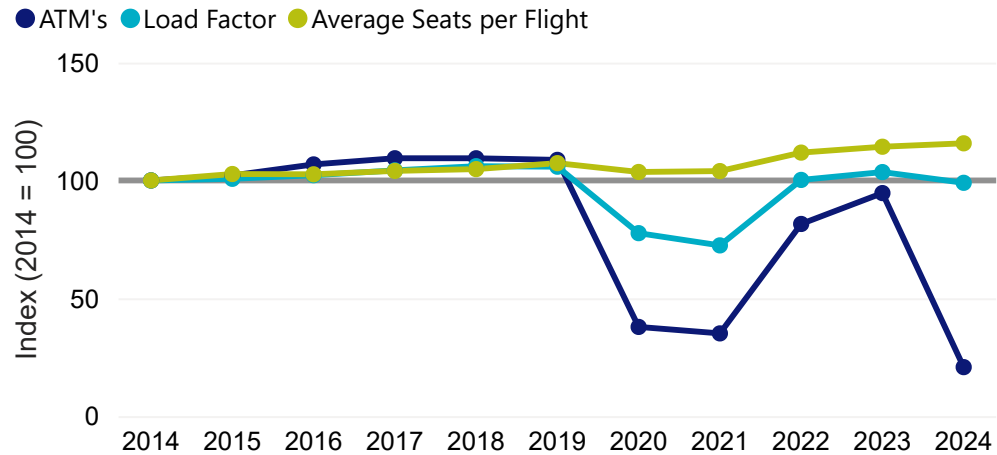
Cargo tonnage (millions)



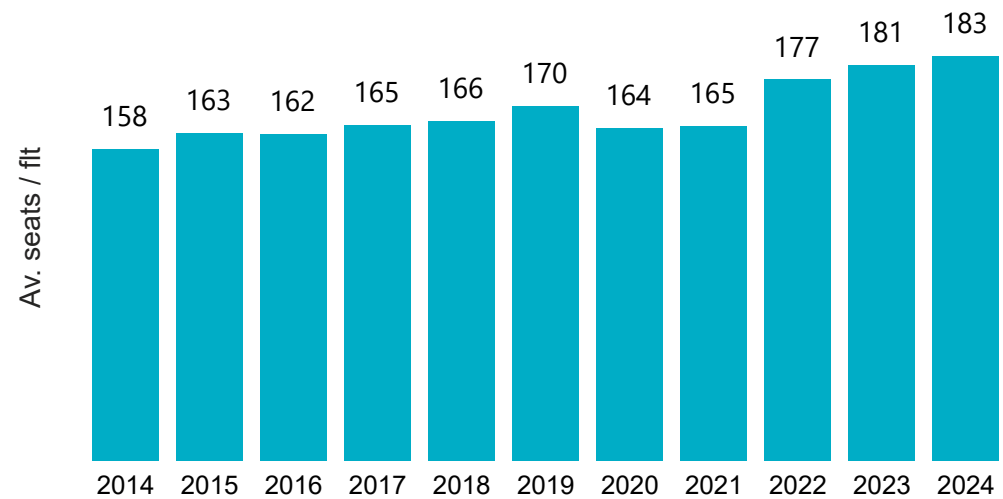
10 Year trends

Load Factor & Average Seats per Flight (NB: 2024 values are year-to-date and will update throughout the year)

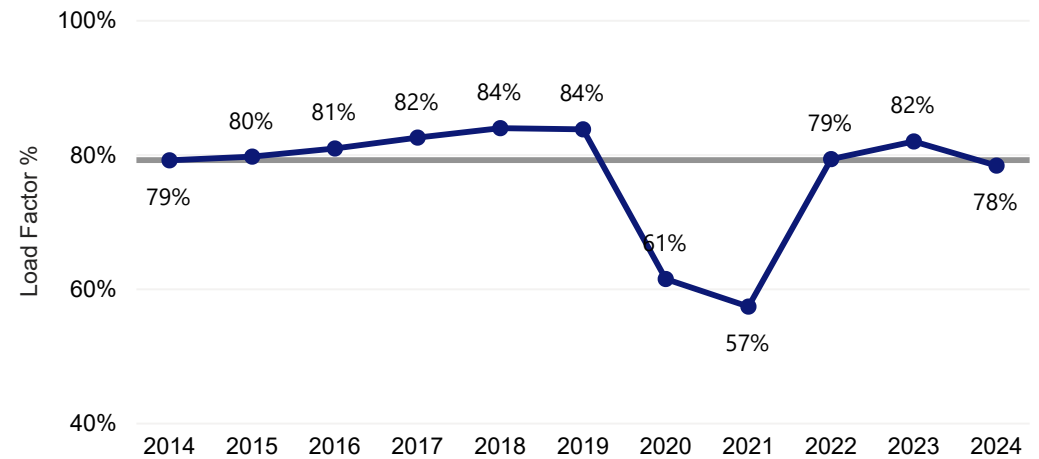
Indexed ATM, load factor and average seats per flight (2014 = 100)



Average seats per flight



Average load factor (%)

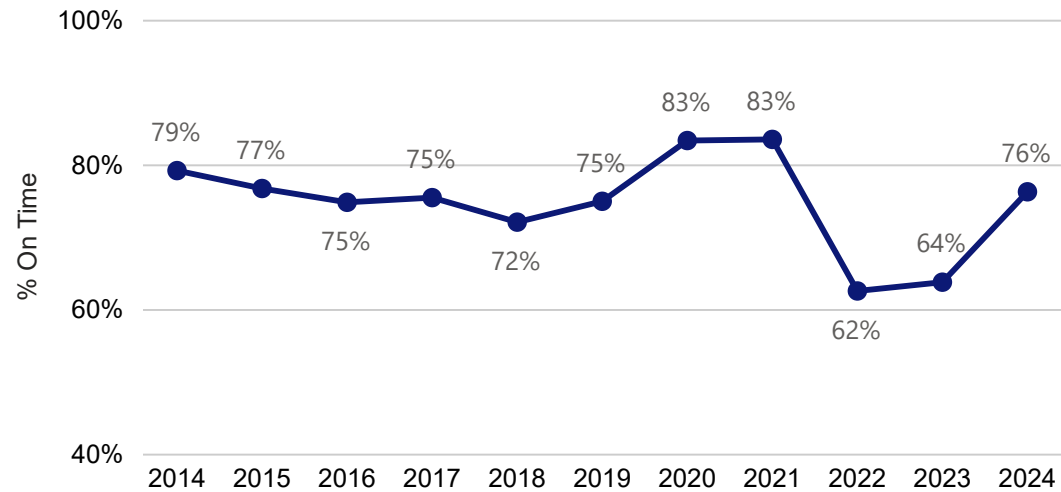


NB: Load Factor (%) represents the proportion of seats on a flight used on a flight i.e. Terminal Passengers / Total Seats.

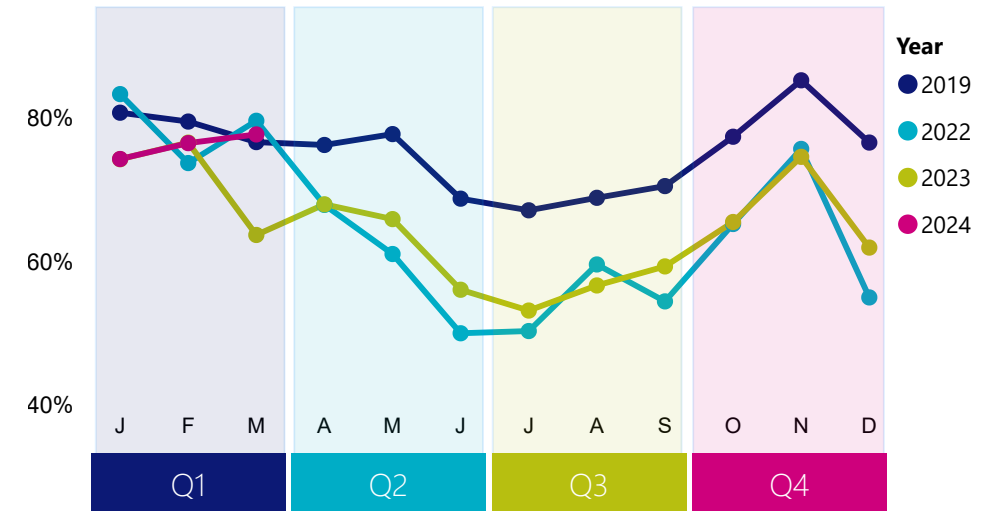
10 Year trends

Punctuality (NB: 2024 values are year-to-date and will update throughout the year)

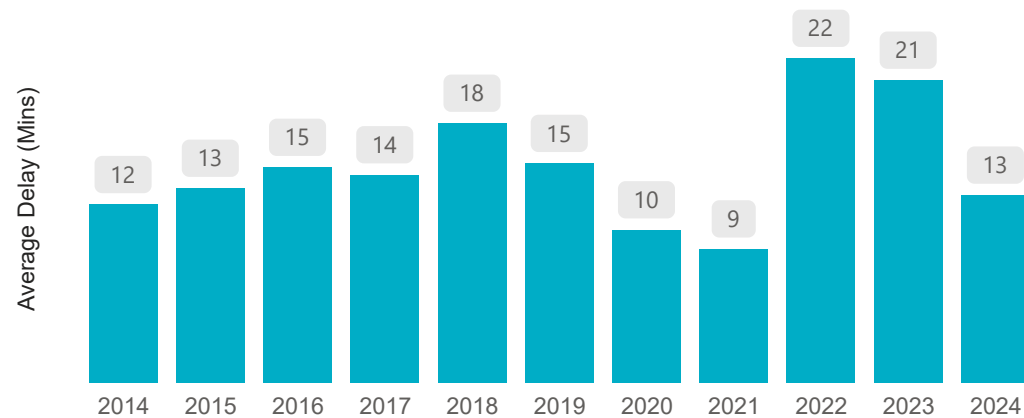
% On-time performance (OTP) <15mins



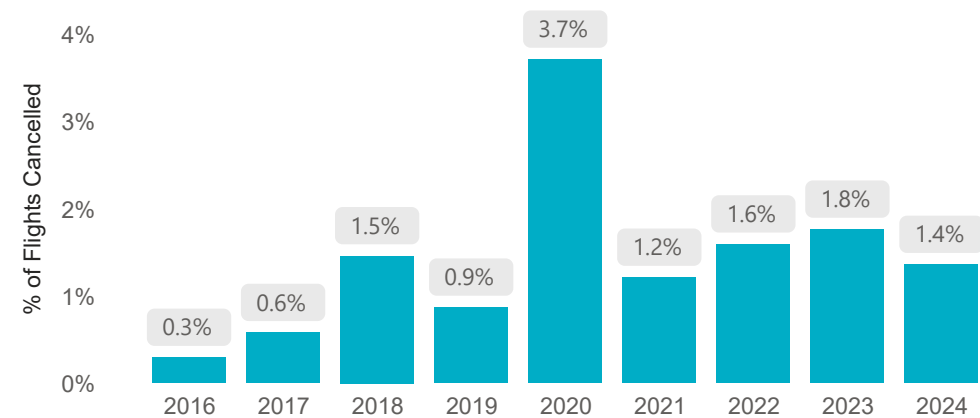
%OTP by month (last five years)



Average delay minutes per flight



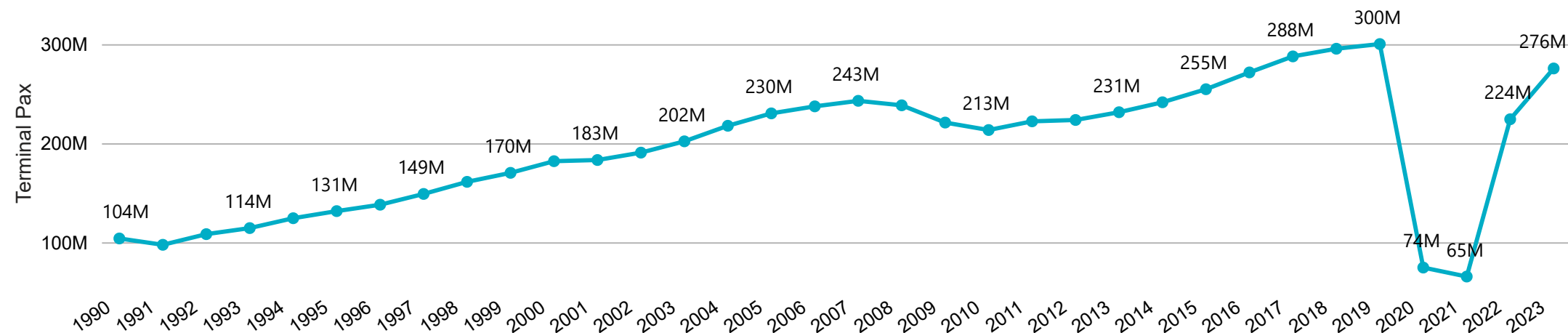
% of flights cancelled (within 24hr before departure)



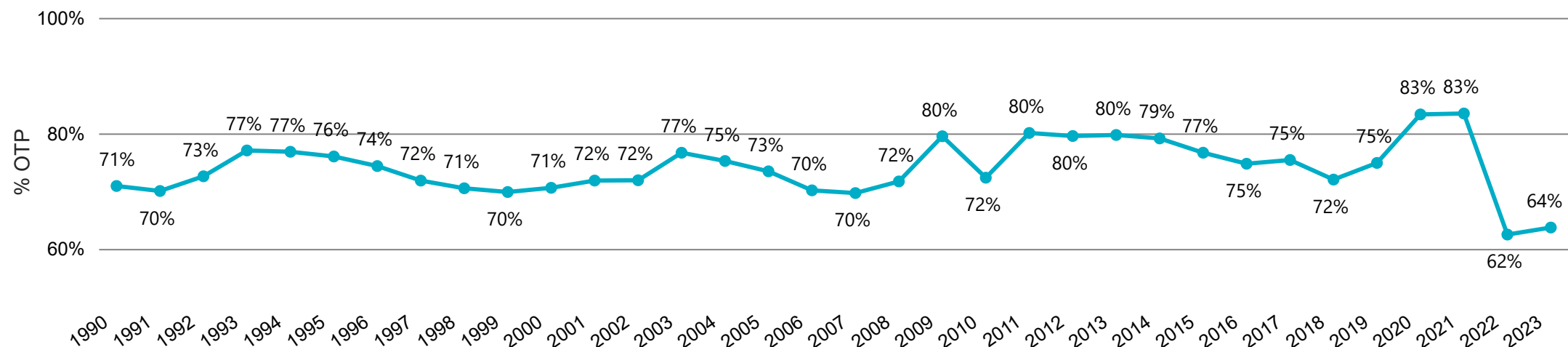
Trend since 1990 (30+ years)

Terminal Passengers and % On-Time Performance

Annual UK Terminal Passengers (1990 - 2023)



On-Time Performance (within 15mins of schedule)

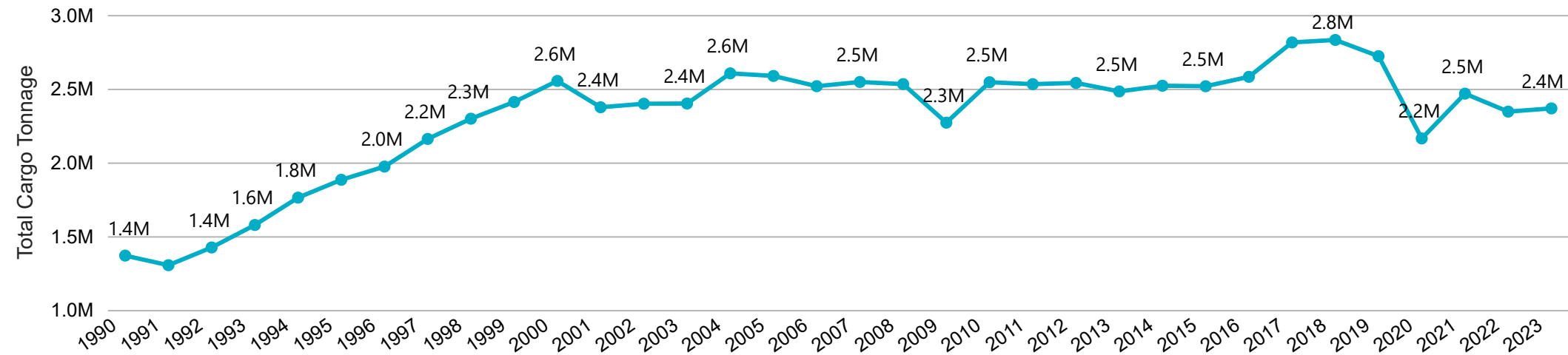


Trends since 1990 (30+ years)

Cargo Tonnage



Annual UK Cargo Tonnage (1990 - 2023)



Data Tables (Latest Quarter): *Terminal Passengers - Q1 2024*

Top 25 UK reporting airports		
Reporting Airport	Term. Passengers	% Var.
Heathrow	18,517,489	10% ▲
Gatwick	8,333,035	12% ▲
Stansted	6,051,929	10% ▲
Manchester	5,835,503	12% ▲
Luton	3,411,946	3% ▲
Edinburgh	2,960,513	11% ▲
Birmingham	2,400,578	16% ▲
Bristol	1,864,096	12% ▲
Glasgow	1,476,235	11% ▲
Belfast Int'l	1,325,342	30% ▲
Liverpool	914,619	17% ▲
Newcastle	878,309	12% ▲
London City	754,868	3% ▲
Leeds Bradford	656,685	9% ▲
East Midlands	598,926	31% ▲
Belfast City	536,129	19% ▲
Aberdeen	478,414	1% ▲
Jersey	270,546	6% ▲
Southampton	176,083	11% ▲
Bournemouth	142,680	19% ▲
Guernsey	137,434	4% ▲
Cardiff	134,985	15% ▲
Isle Of Man	134,213	-5% ▼
Inverness	132,337	-6% ▼
Newquay	71,079	64% ▲
Total	58,193,973	11% ▲

Top 25 Airlines		
Airline (groups)	Term. Passengers	% Var.
British Airways	11,800,092	10% ▲
EasyJet	11,130,748	11% ▲
Ryanair	10,823,675	9% ▲
Wizz Air	2,581,645	4% ▲
Jet2.com	2,500,031	16% ▲
Tui Airways	1,622,815	17% ▲
Emirates	1,355,995	5% ▲
Virgin Atlantic	1,227,558	7% ▲
Aer Lingus	1,018,350	-0% ▼
KLM	977,766	16% ▲
Qatar Airways	827,328	38% ▲
Vueling	686,163	12% ▲
Lufthansa	679,054	7% ▲
American Airlines	667,367	12% ▲
Loganair	568,702	-5% ▼
Turkish Airlines	518,898	3% ▲
United Airlines	465,690	-4% ▼
Swiss Airlines	388,837	9% ▲
Norwegian	377,022	4% ▲
Etihad Airways	349,780	40% ▲
Air Canada	348,272	4% ▲
SAS	347,823	15% ▲
Air India	335,632	13% ▲
Air France	288,071	-17% ▼
Delta Airlines	279,815	14% ▲
Total	52,167,129	10% ▲

Top 25 international destinations		
OD Airport Name	Term. Passengers	% Var.
Dublin	2,292,153	8% ▲
Amsterdam	1,928,015	17% ▲
Dubai	1,541,052	8% ▲
Geneva	1,462,147	13% ▲
Tenerife (Surreina Sofia)	1,380,129	10% ▲
Alicante	1,057,310	19% ▲
Paris (Charles De Gaulle)	1,004,009	12% ▲
Barcelona	976,619	11% ▲
Doha Hamad	919,701	33% ▲
Malaga	909,166	17% ▲
Arrecife	817,693	14% ▲
Madrid	806,208	3% ▲
New York (Jf Kennedy)	780,367	6% ▲
Lisbon	664,425	4% ▲
Istanbul	629,435	26% ▲
Frankfurt Main	566,136	11% ▲
Krakow	545,765	14% ▲
Copenhagen	533,894	3% ▲
Faro	508,072	11% ▲
Zurich	507,588	11% ▲
Berlin Brandenburg	482,660	8% ▲
Las Palmas	473,072	13% ▲
Budapest	472,411	10% ▲
Bucharest (Otopeni)	457,690	7% ▲
Rome (Fiumicino)	452,213	13% ▲

Data Tables (Latest Quarter): *ATM's* - Q1 2024

Top 25 UK Reporting Airports			
Reporting Airport	ATM's	% Var.	
Heathrow	114,378	7%	▲
Gatwick	52,896	5%	▲
Stansted	40,512	8%	▲
Manchester	37,035	11%	▲
Edinburgh	23,415	3%	▲
Luton	21,552	3%	▲
Birmingham	17,205	8%	▲
Aberdeen	14,005	1%	▲
Glasgow	13,565	6%	▲
Bristol	13,411	11%	▲
London City	11,954	-1%	▼
Belfast Int'l	10,657	26%	▲
East Midlands	9,028	0%	▲
Newcastle	7,062	15%	▲
Belfast City	7,012	6%	▲
Liverpool	6,803	15%	▲
Leeds Bradford	5,168	5%	▲
Southampton	4,130	5%	▲
Guernsey	3,580	3%	▲
Jersey	3,571	-1%	▼
Sumburgh	2,952	9%	▲
Norwich	2,532	-28%	▼
Kirkwall	2,354	-0%	▼
Inverness	2,177	-17%	▼
Isle Of Man	2,028	-16%	▼
Total	428,982	6%	▲

Top 25 international destinations			
OD Airport Name	ATM's	% Var.	
Dublin	19,626	4%	▲
Amsterdam	19,188	20%	▲
Geneva	11,242	10%	▲
Paris (Charles De Gaulle)	8,416	13%	▲
Tenerife (Surreina Sofia)	7,810	9%	▲
Frankfurt Main	6,553	15%	▲
Barcelona	6,374	10%	▲
Alicante	6,354	17%	▲
Malaga	5,552	15%	▲
Madrid	5,028	-3%	▼
Arrecife	4,814	13%	▲
Lisbon	4,580	2%	▲
New York (Jf Kennedy)	4,519	6%	▲
Zurich	4,497	4%	▲
Copenhagen	4,202	-2%	▼
Istanbul	4,131	39%	▲
Dubai	4,112	14%	▲
Berlin Brandenburg	3,650	11%	▲
Faro	3,335	8%	▲
Doha Hamad	3,188	34%	▲
Krakow	3,146	10%	▲
Rome (Fiumicino)	2,926	6%	▲
Budapest	2,879	11%	▲
Las Palmas	2,813	12%	▲
Bucharest (Otopeni)	2,584	5%	▲

ATM's by operation type			
Op. Type	ATM's	% Var.	
Scheduled	419,552	6%	▲
Charter	23,357	5%	▲

ATM's by market			
Market	ATM's	% Var.	
W. Europe	239,547	7%	▲
Domestic	105,463	3%	▲
RoW	39,882	19%	▲
E. Europe	31,191	7%	▲
N. America	26,830	2%	▲

Data Tables (Latest Quarter): *Cargo Tonnage - Q1 2024*

Cargo Tonnage by UK reporting airport		
Reporting Airport	Cargo Tonnage	% Var.
Heathrow	393,748	20% ▲
East Midlands	86,503	-4% ▼
Stansted	65,653	18% ▲
Manchester	18,592	41% ▲
Gatwick	18,080	64% ▲
Belfast Int'l	9,594	11% ▲
Edinburgh	8,264	10% ▲
Luton	7,357	7% ▲
Birmingham	7,060	86% ▲
Bournemouth	4,713	0% ▲
Prestwick	2,335	-2% ▼
Aberdeen	2,197	504% ▲
Newcastle	1,436	142% ▲
Glasgow	1,326	-16% ▼
Inverness	970	7% ▲
Exeter	771	35% ▲
Guernsey	641	-4% ▼
Sumburgh	255	-4% ▼
Kirkwall	225	-5% ▼
Stornoway	220	9% ▲
Jersey	137	-75% ▼
Benbecula	128	14% ▲
Islay	57	-1% ▼
Alderney	24	-10% ▼
Southampton	21	310% ▲
Total	630,306	18%

Top 25 international destinations		
OD Airport Name	Cargo Tonnage	% Var.
Dubai	35,941	75% ▲
New York (Jf Kennedy)	33,415	10% ▲
Leipzig	32,208	26% ▲
Doha Hamad	27,106	9% ▲
Los Angeles International	20,011	7% ▲
Mumbai	13,747	20% ▲
Bahrain	12,444	42% ▲
Guangzhou Baiyun International	12,324	7% ▲
Cologne Bonn	11,951	-29% ▼
Singapore	11,606	41% ▲
Chicago (O'Hare)	11,245	-11% ▼
Istanbul	11,211	-7% ▼
Delhi	11,153	44% ▲
Cincinnati	10,848	54% ▲
Shanghai (Pu Dong)	10,738	252% ▲
Hong Kong (Chek Lap Kok)	10,044	14% ▲
Miami International	9,988	7% ▲
Paris (Charles De Gaulle)	9,530	-13% ▼
Brussels	9,134	17% ▲
Tokyo (Haneda)	9,013	12% ▲
Toronto	8,894	-1% ▼
Abu Dhabi International	7,706	-22% ▼
Memphis	7,638	-3% ▼
Dallas/Fort Worth	7,490	27% ▲
Beijing	7,306	930%

Cargo Tonnage by operation type		
Op. Type	Cargo Tonnage	% Var.
Scheduled	595,499	17% ▲
Charter	34,859	31% ▲

Cargo Tonnage by market		
Market	Cargo Tonnage	% Var.
RoW	291,456	41% ▲
N. America	186,706	6% ▲
W. Europe	115,019	1% ▲
Domestic	35,916	4% ▲
E. Europe	1,260	-10% ▼