



CAA Aviation Trends Quarter 1 2025

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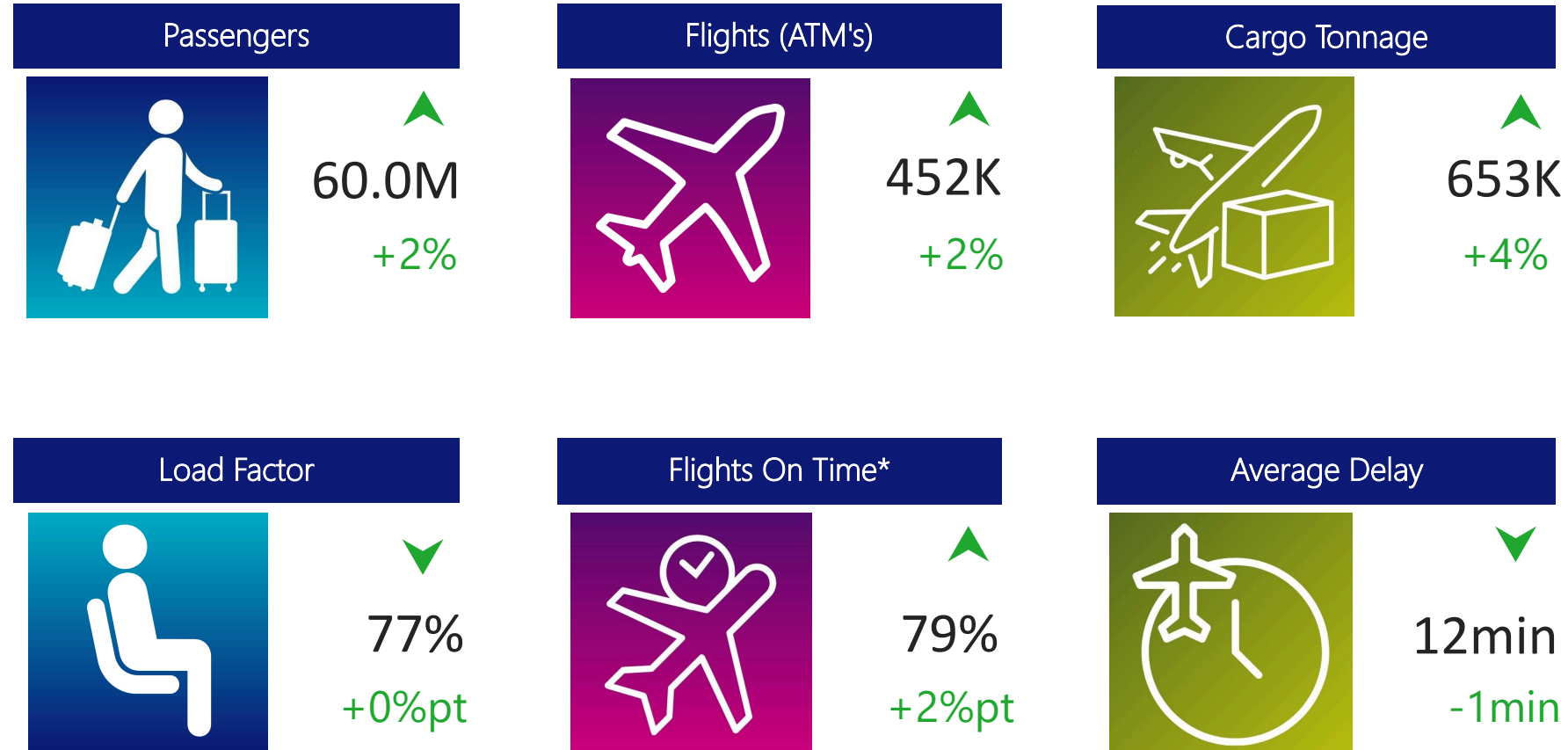
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Report Notes

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)**
 - c. 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.
 - d. 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**
 - e. 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
 - f. 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/depended 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).
 - g. 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.
 - h. 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.
 - i. 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.
 - j. 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.
 - k. 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 2025 (vs 2024)



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.

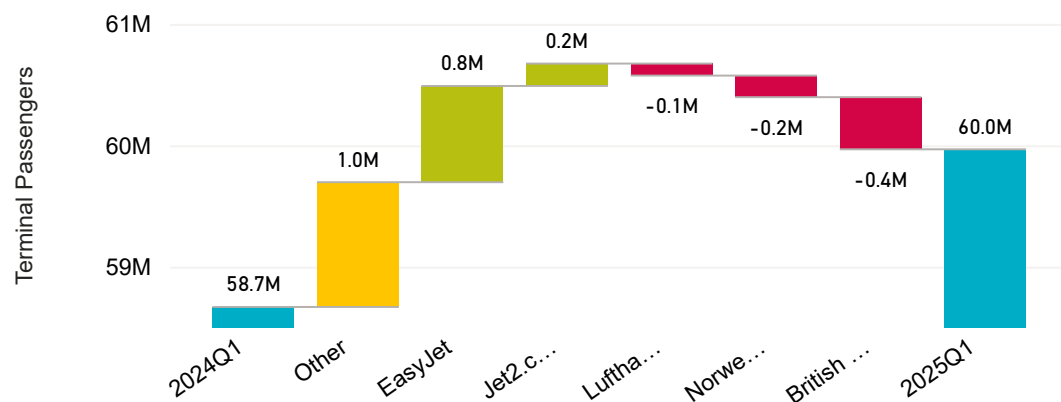
The text in green or red show growth rates relative to the same period last year.

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

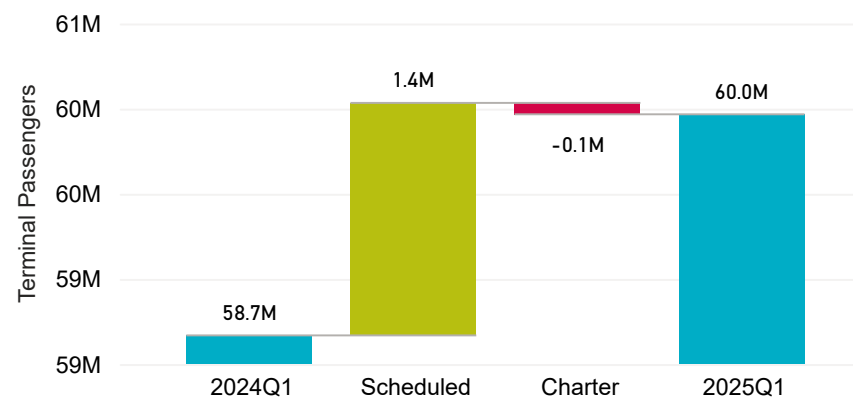
Terminal passengers Q1 2025

Year-on-year comparison

Terminal passengers by airline

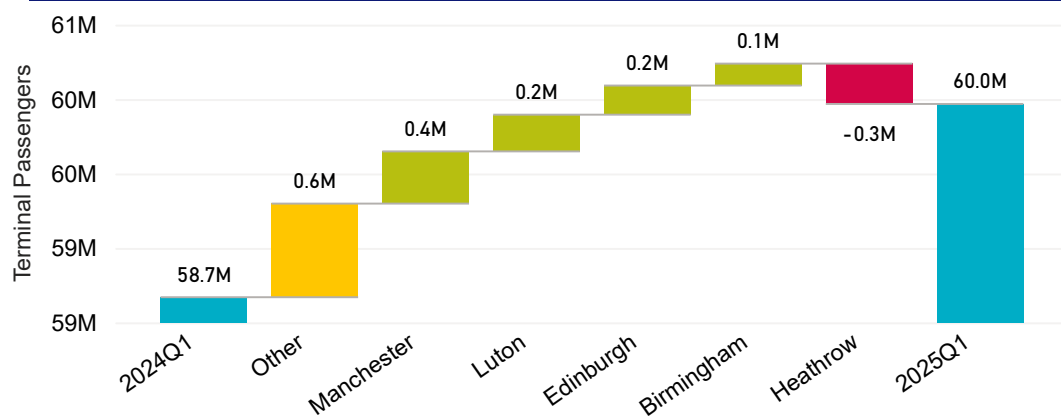


Terminal passengers by scheduled & charter services

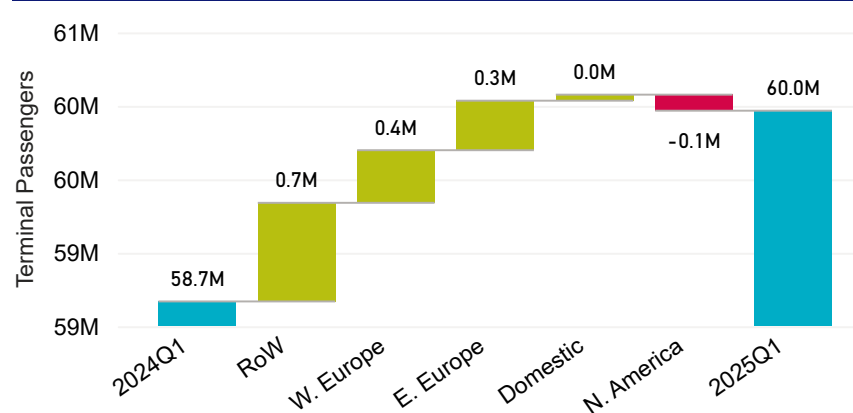


The number of terminal passengers in Q1 was 60.0M up from 58.7M in the same period last year.

Terminal passengers by reporting airport



Terminal passengers by market

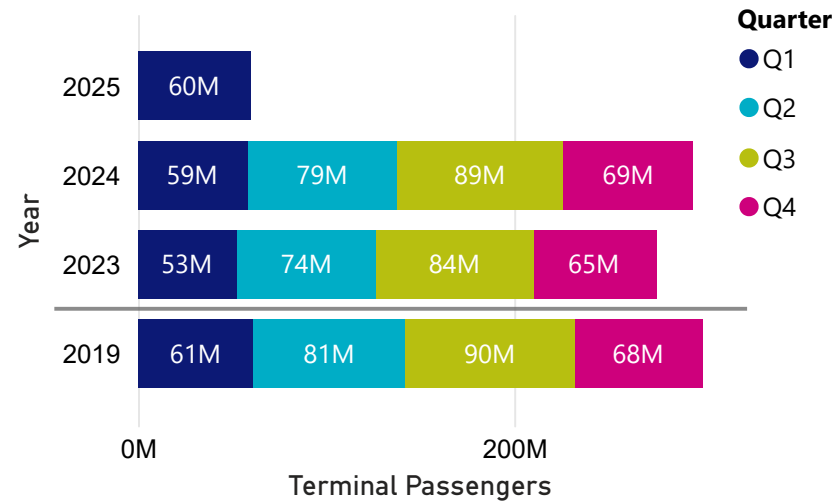


The charts on this page show the distribution of passenger growth across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

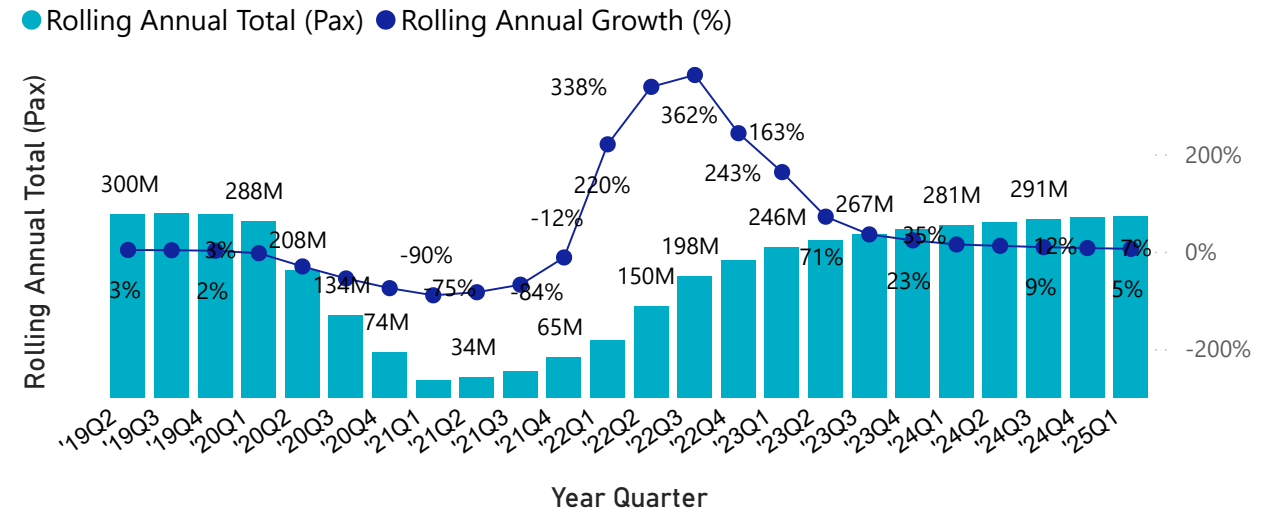
Terminal passengers

5 Year Trend

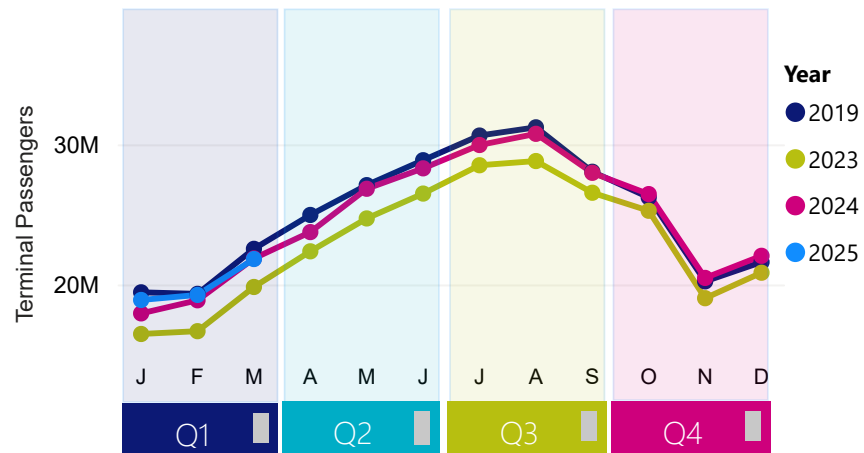
Quarterly



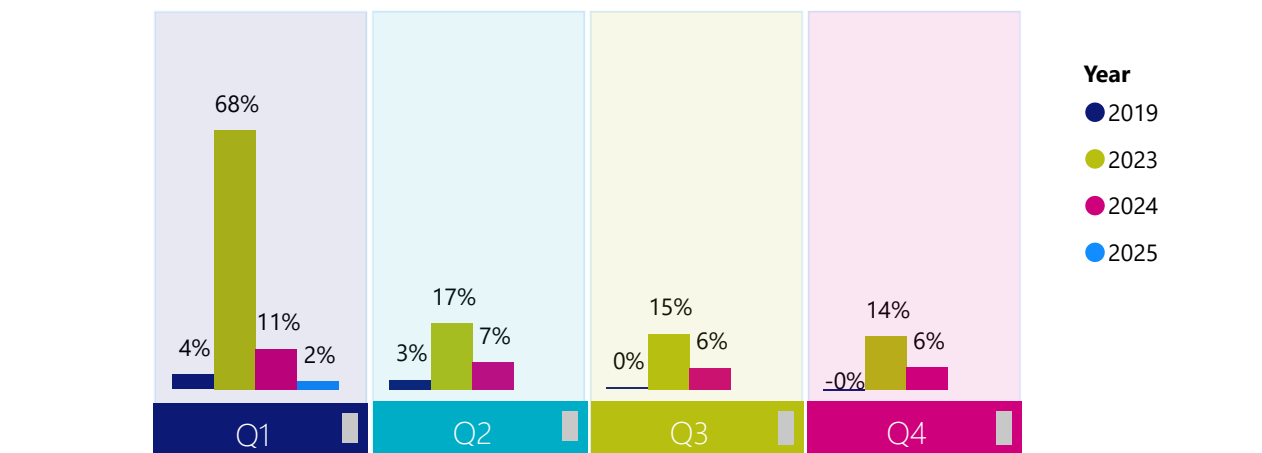
Rolling 12-month total



Monthly



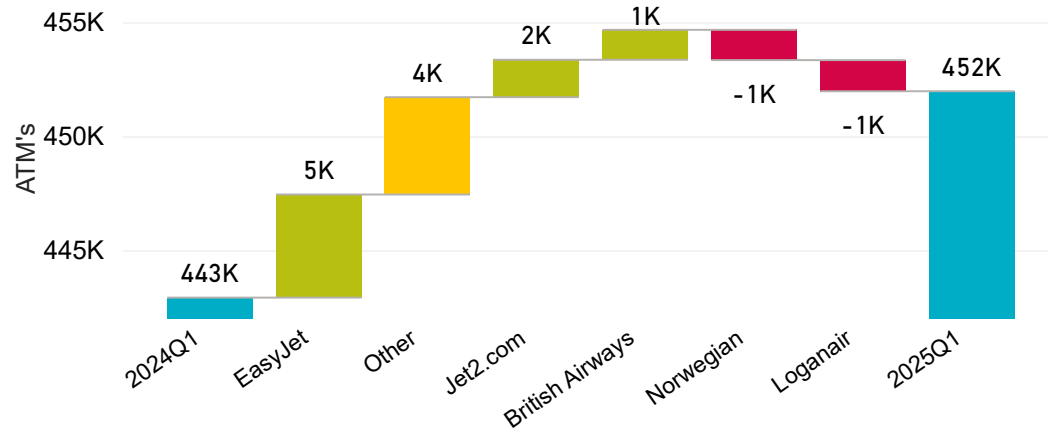
Year-on-year % Variance



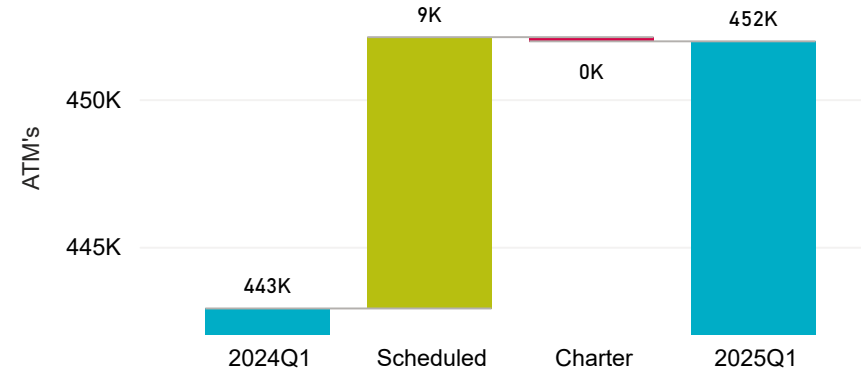
Air Transport Movements (ATM's) - Q1 2025

Year-on-year comparison

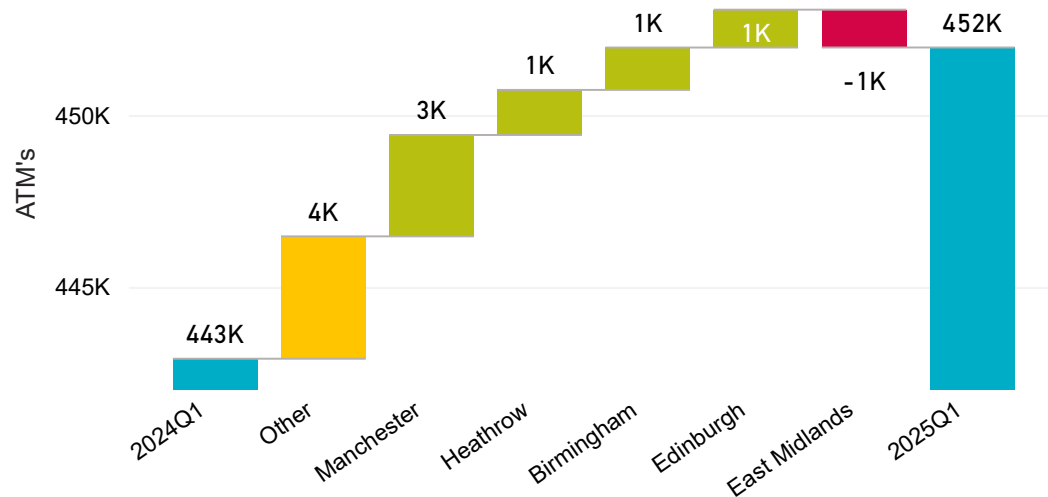
ATM's by airline



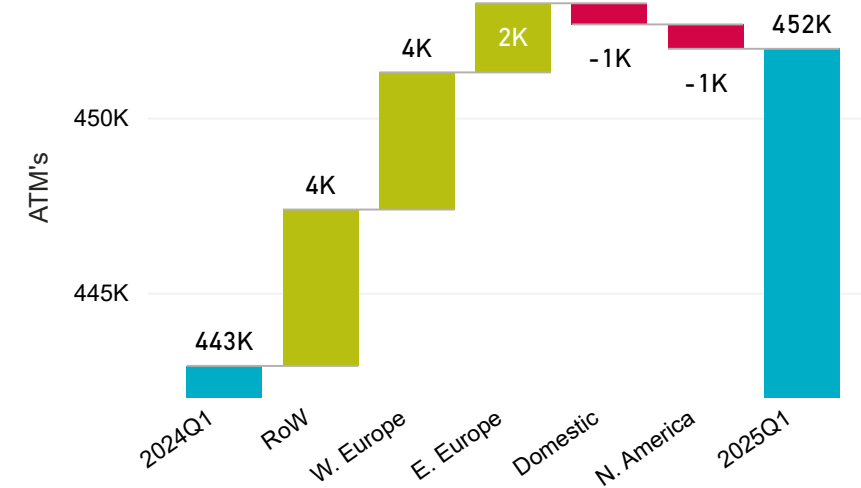
ATM's by scheduled & charter operation



ATM's by reporting airport



ATM's by market



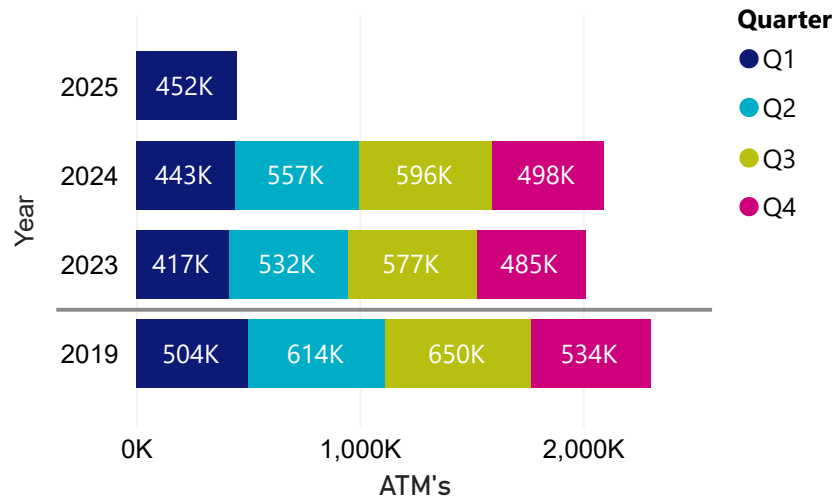
The number of ATM's in Q1 was 452K up from 443K in the same period last year.

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".

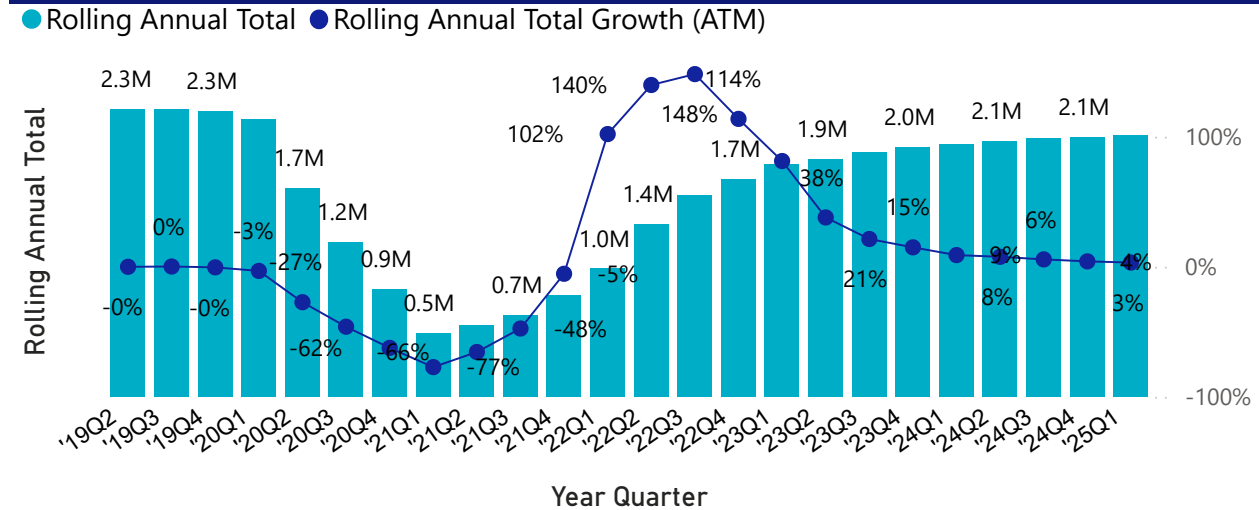
Air Transport Movements (ATM's)

5 Year Trend

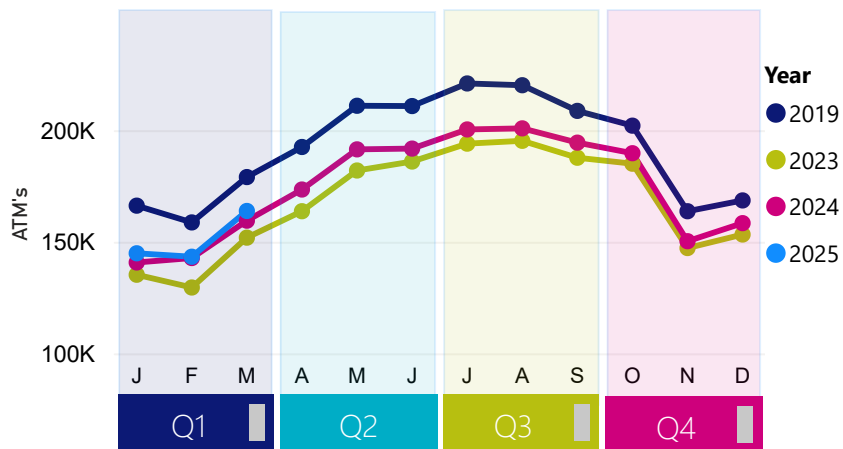
Quarterly



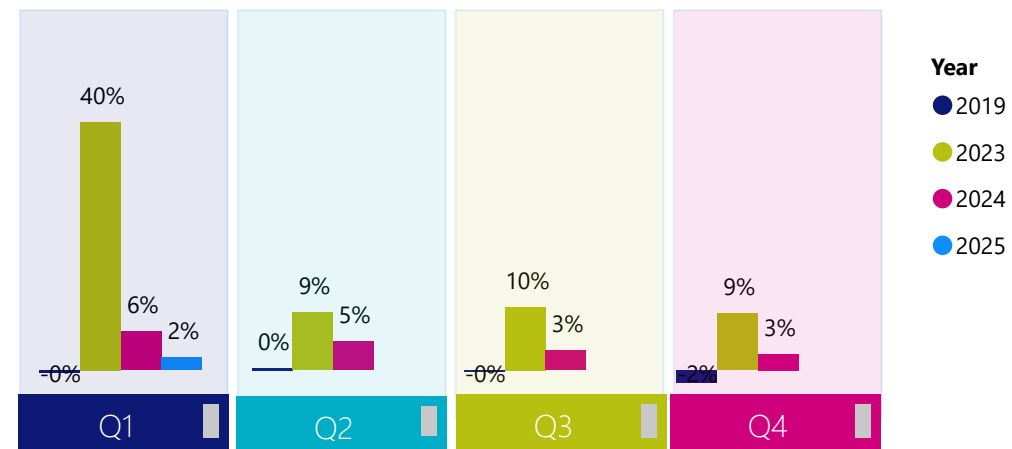
Rolling 12-month total



Monthly



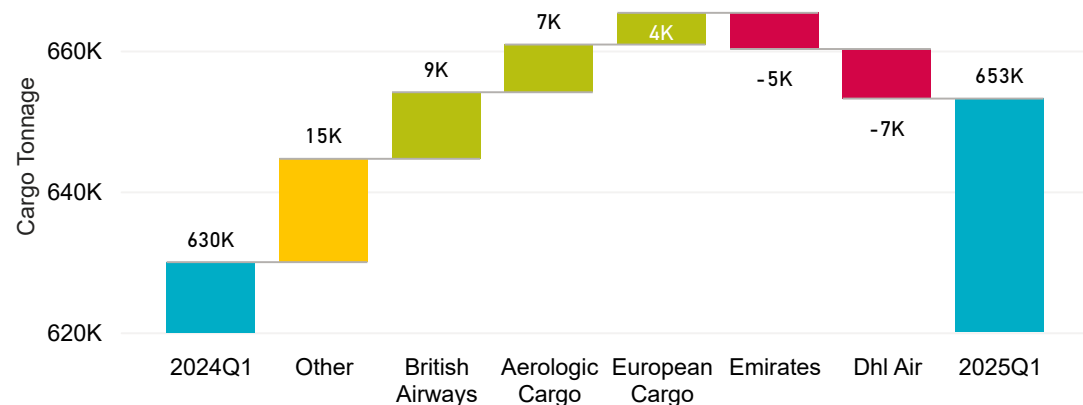
Year-on-year % Variance



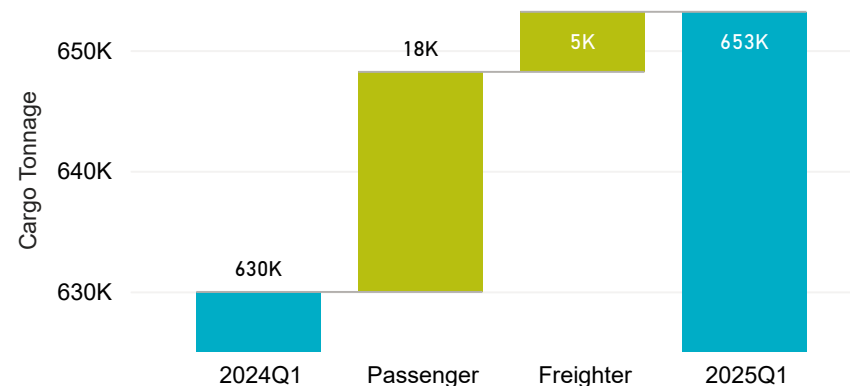
Cargo Tonnage - Q1 2025

Year-on-year comparison

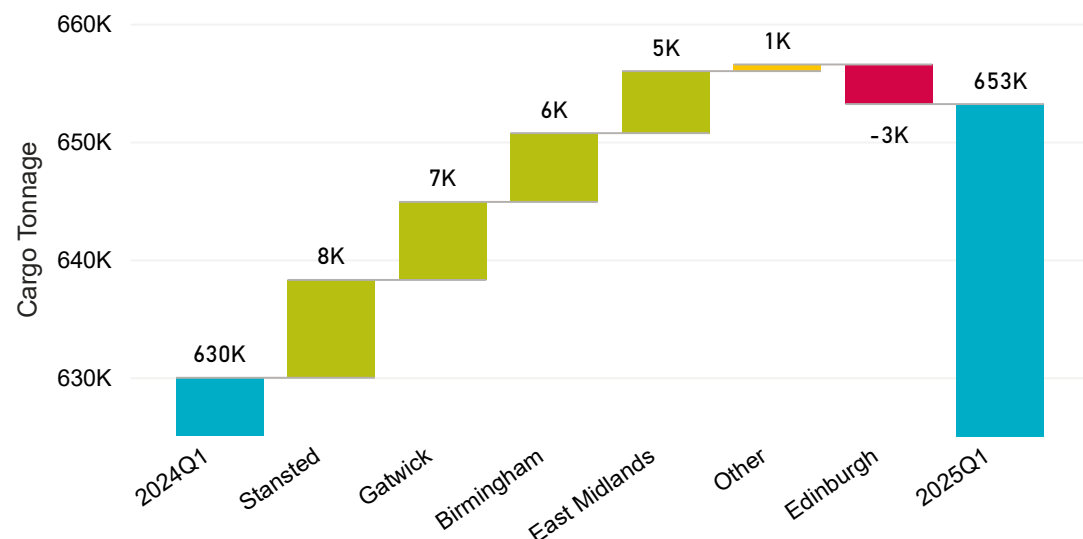
Cargo tonnage by airline



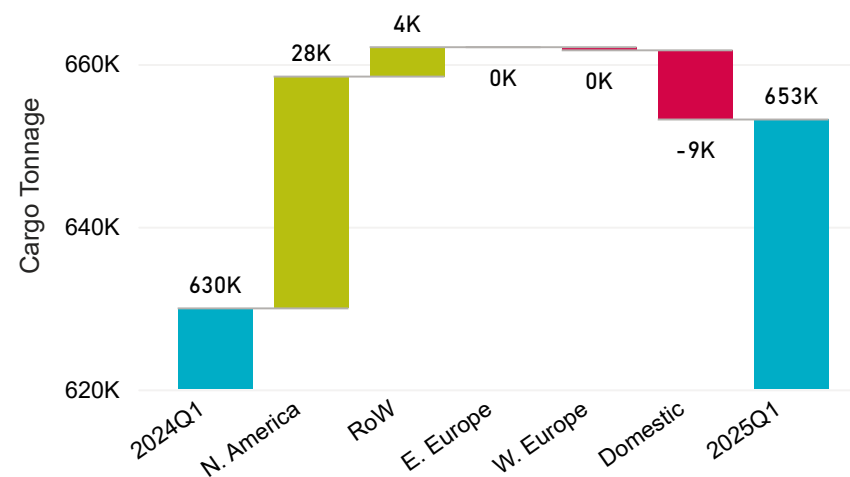
Cargo tonnage by passenger & freighter services



Cargo tonnage by reporting airport



Cargo tonnage by market



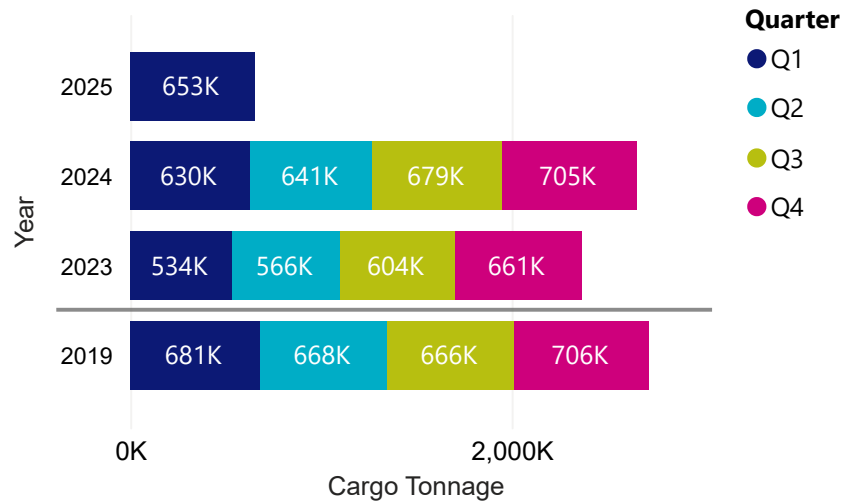
Cargo Tonnage in Q1 was 653K up from 630K in the same period last year.

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".

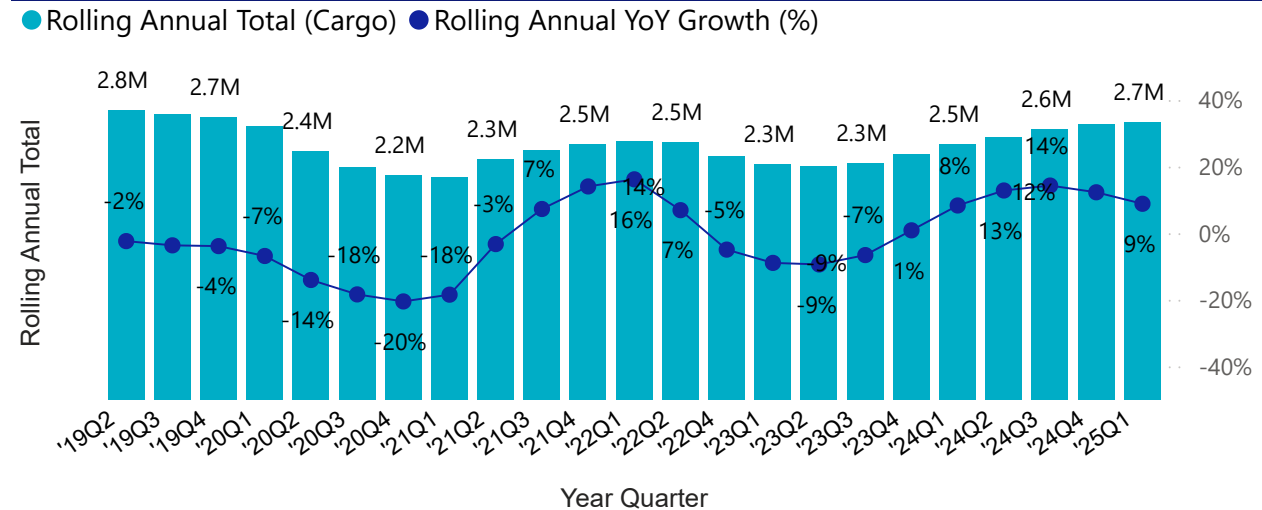
Cargo Tonnage

5 Year Trend

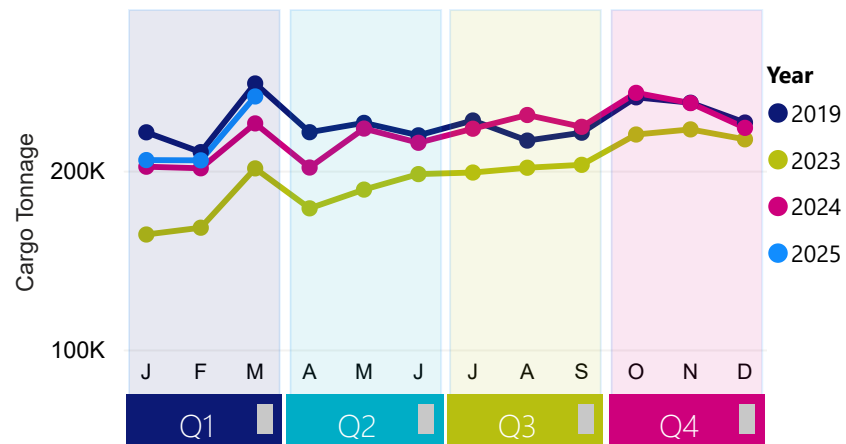
Quarterly



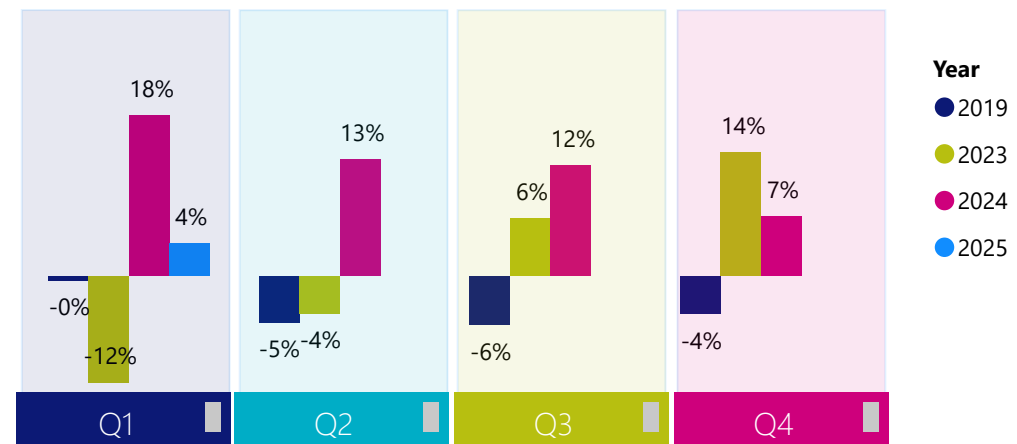
Rolling 12-month total



Monthly



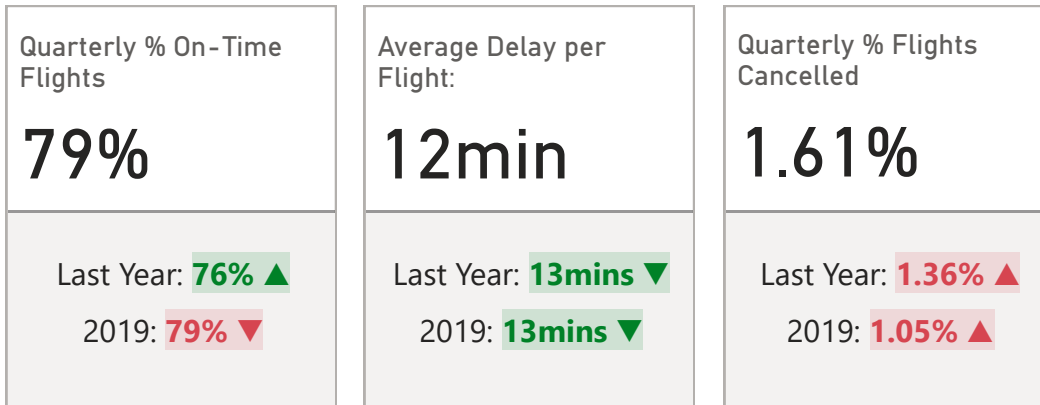
Year-on-year % Variance



Punctuality Trends - Q1 2025

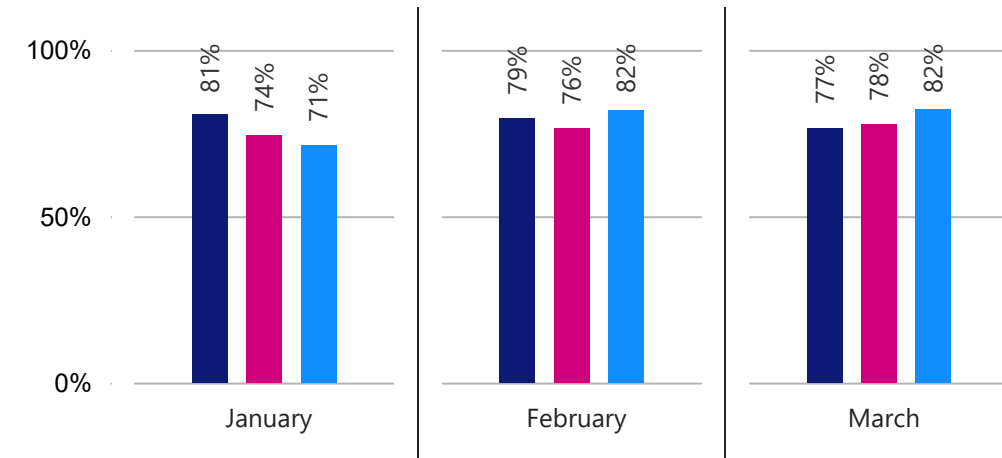
vs Last Year & 2019

Quarterly Results



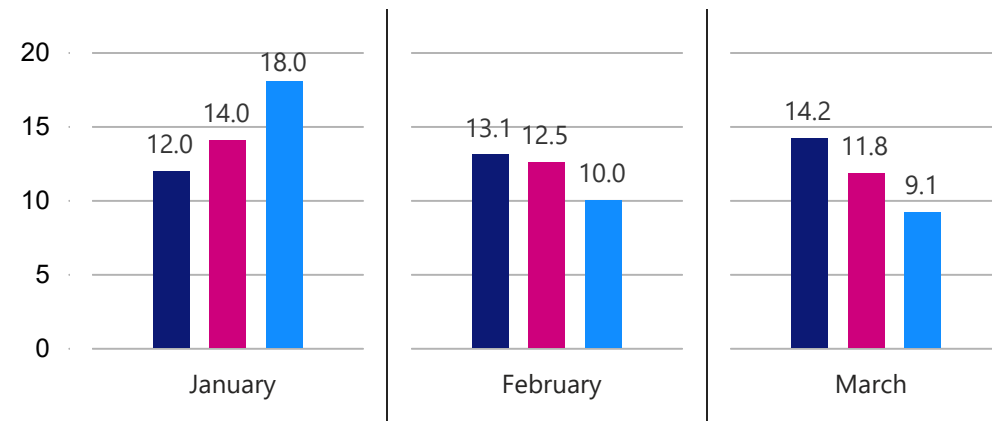
% On-Time Flights (within 15mins of schedule)

Year ● 2019 ● 2024 ● 2025



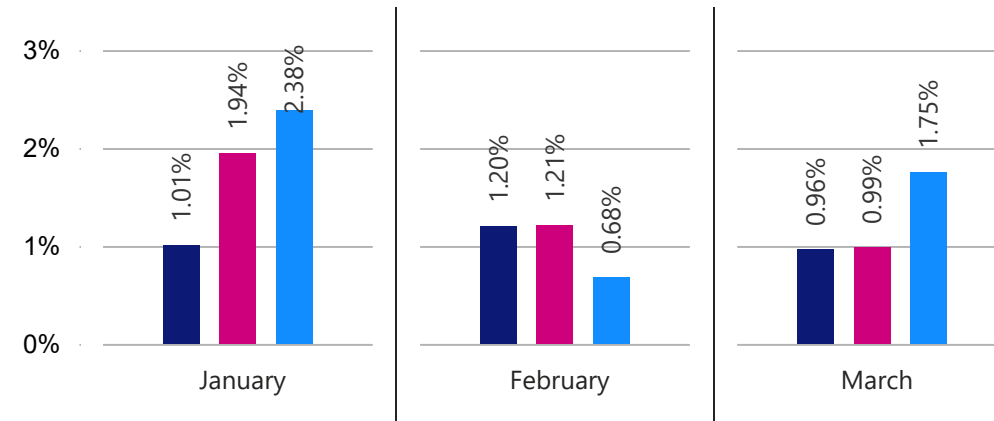
Average Delay per Flight (mins)

Year ● 2019 ● 2024 ● 2025



% Flights Cancelled (inside 24hr before departure)

Year ● 2019 ● 2024 ● 2025

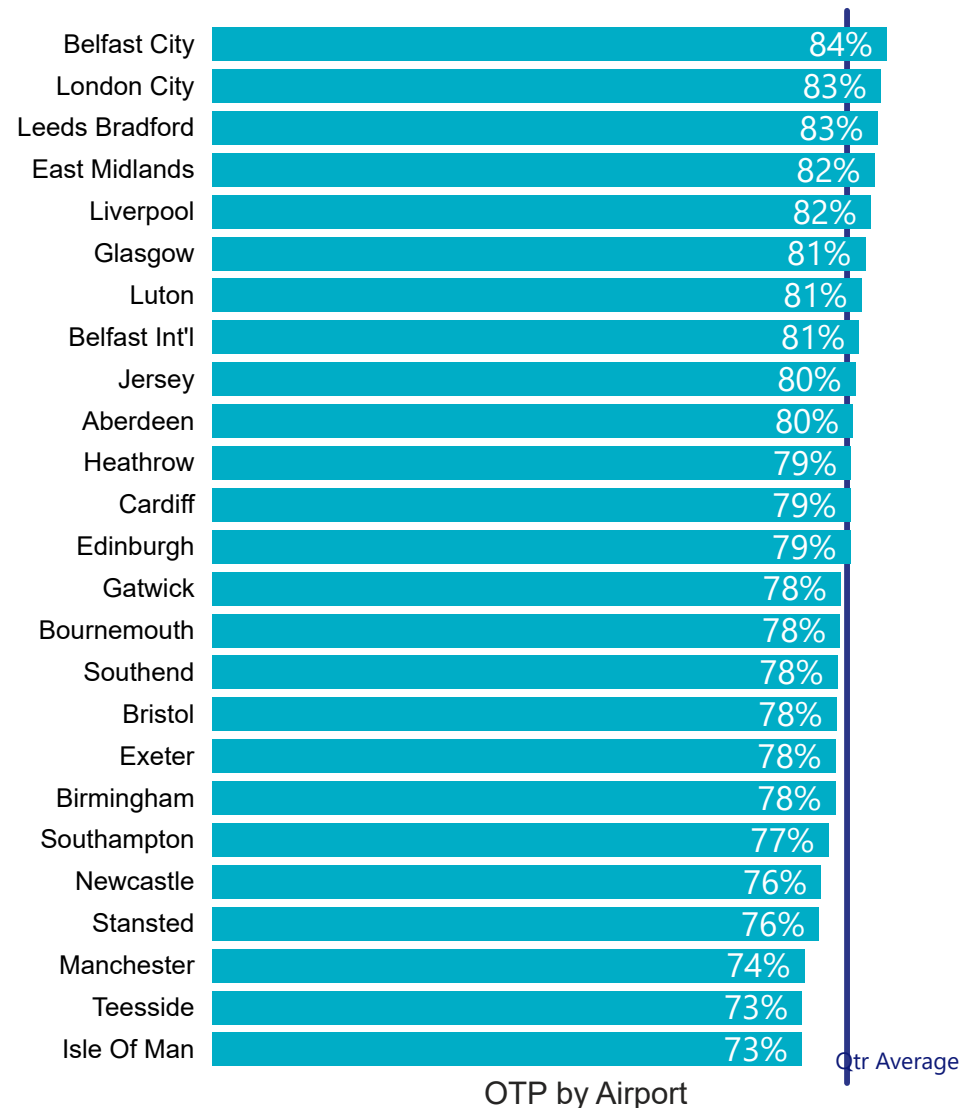


Flight Punctuality - Q1 2025 (UK Arrivals & Departures)

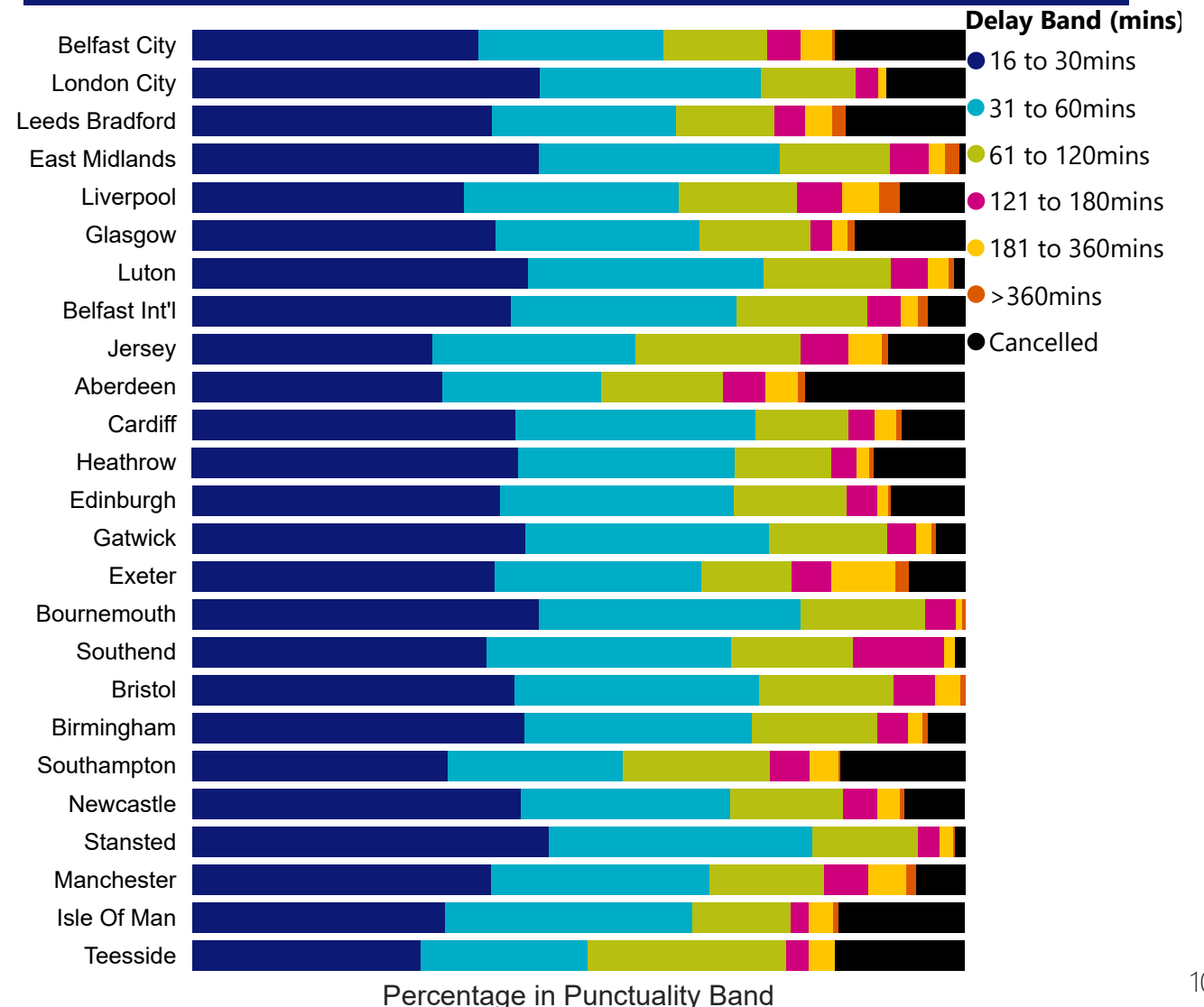
CAA (UK) reporting airports



Percentage of flights on time (<15mins)

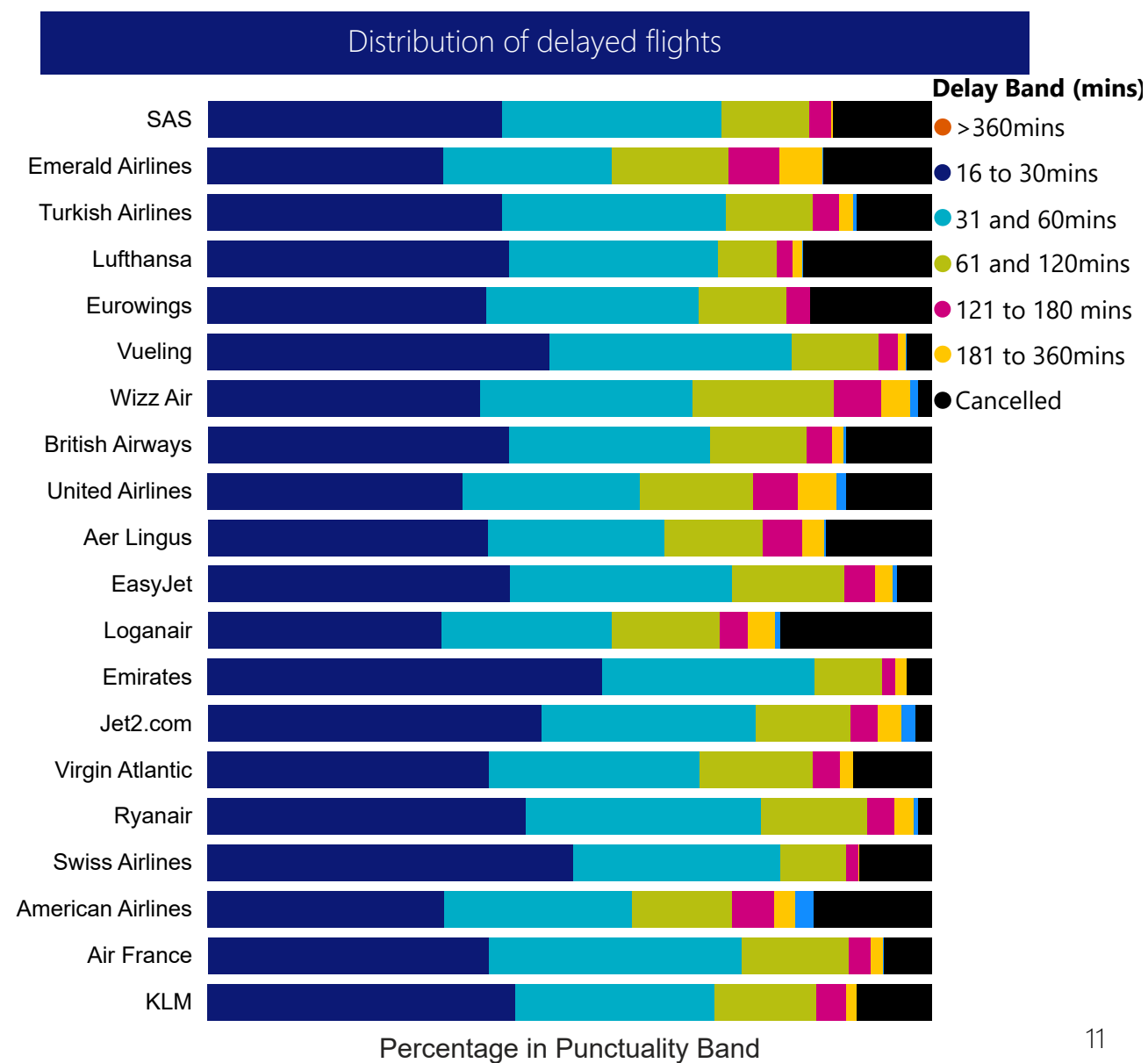
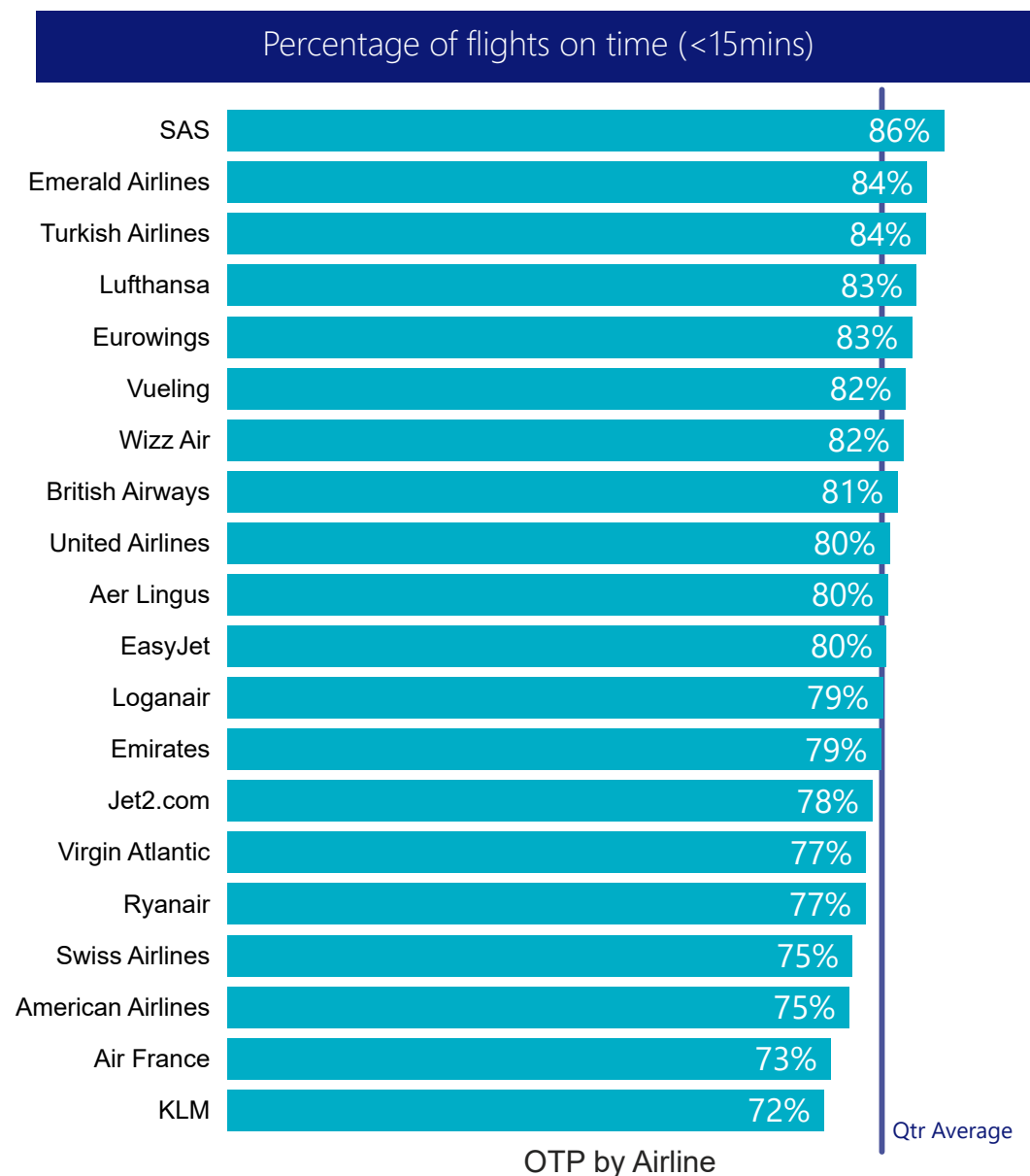


Distribution of delayed flights



Flight Punctuality - Q1 2025 (UK Arrivals & Departures)

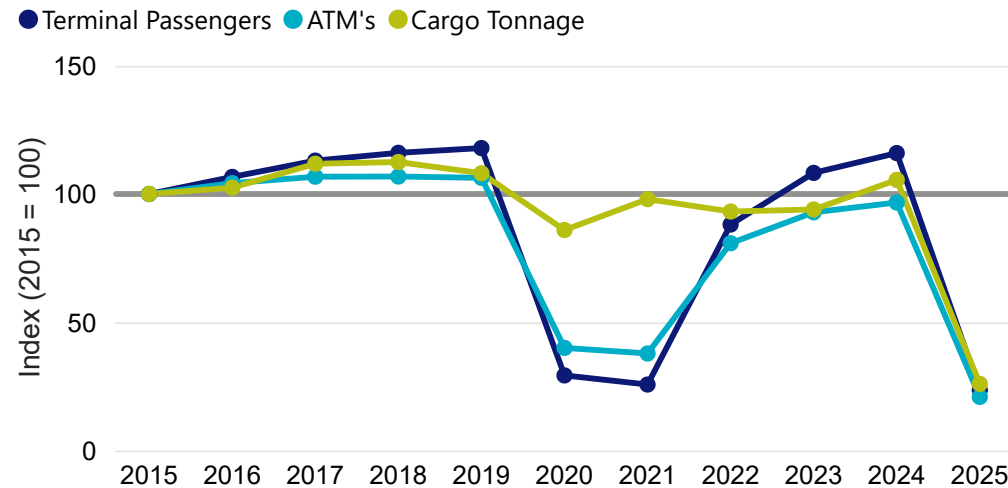
Top 20 largest airlines by ATM's



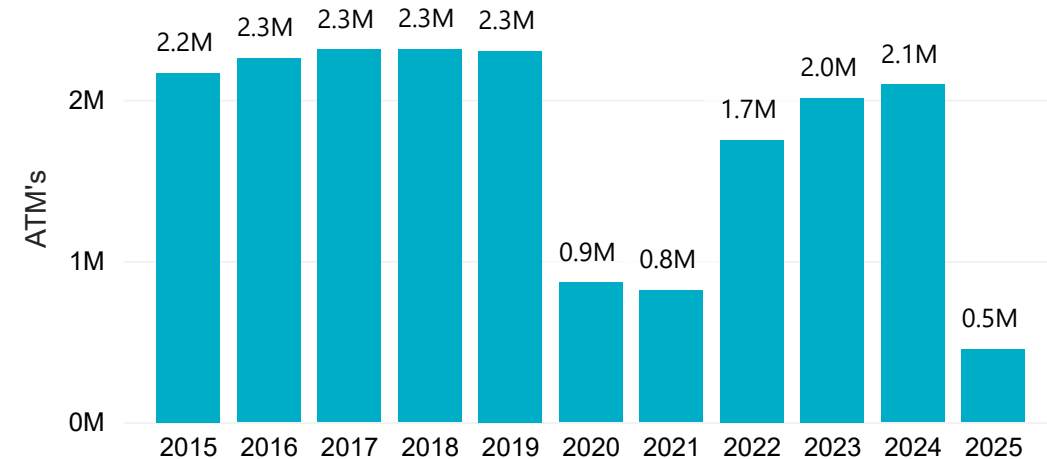
10 year trends

Terminal Passengers, Air Transport Movements (ATM) and Cargo Tonnage (NB: 2025 values are year-to-date and will update throughout the year)

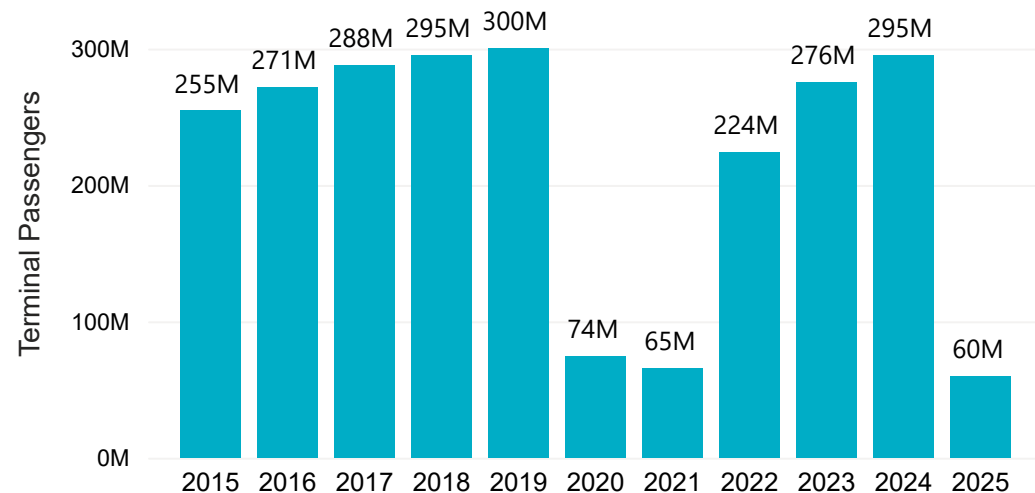
Indexed passenger, ATM and cargo growth (2015 = 100)



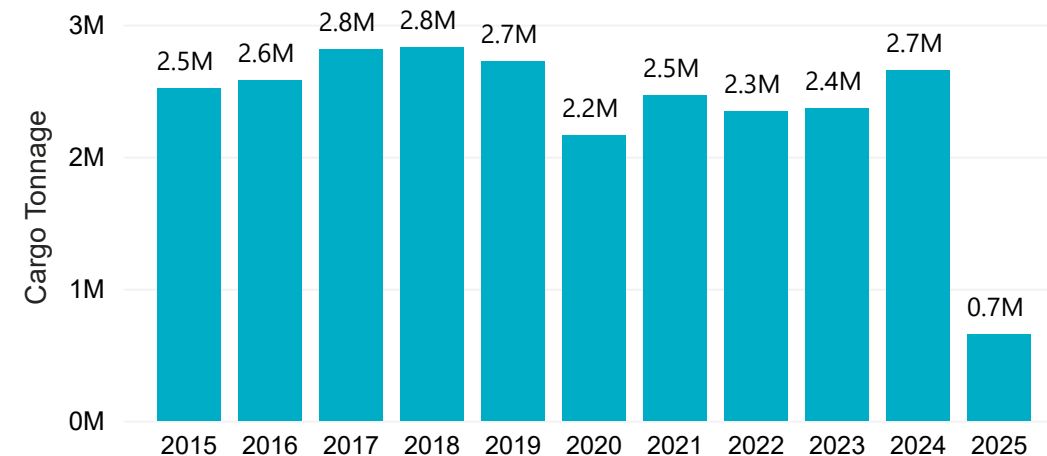
ATM's (millions)



Terminal passengers (millions)



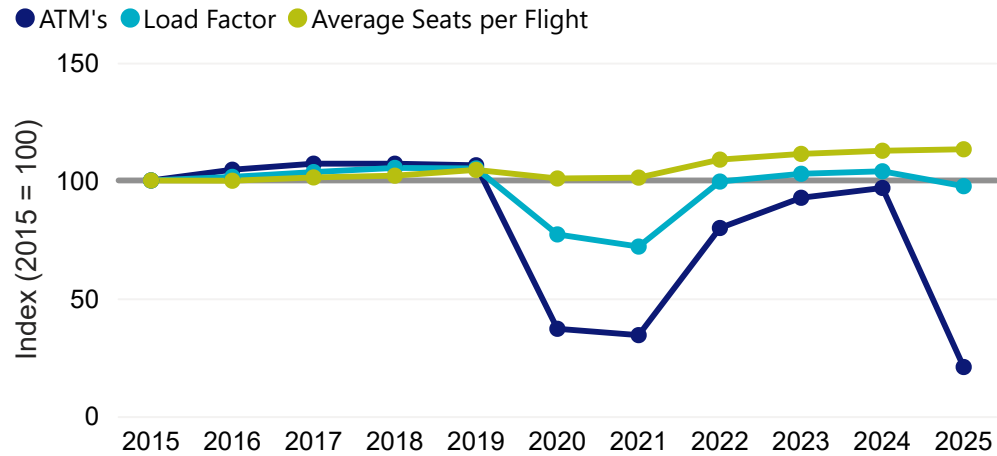
Cargo tonnage (millions)



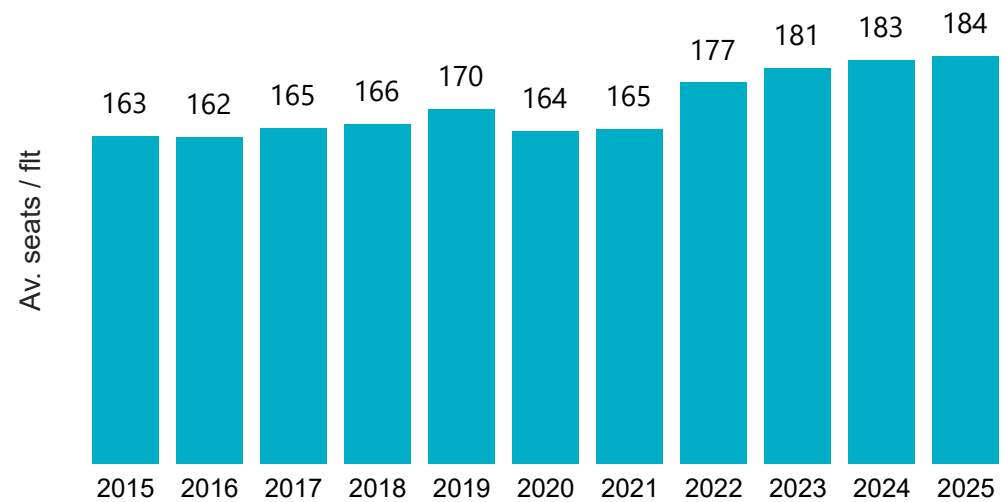
10 Year trends

Load Factor & Average Seats per Flight (NB: 2025 values are year-to-date and will update throughout the year)

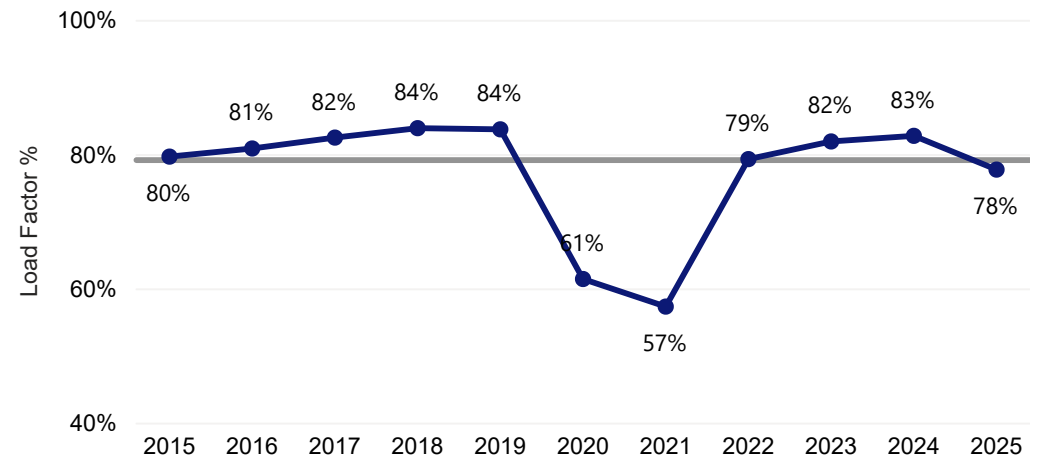
Indexed ATM, load factor and average seats per flight (2015 = 100)



Average seats per flight



Average load factor (%)

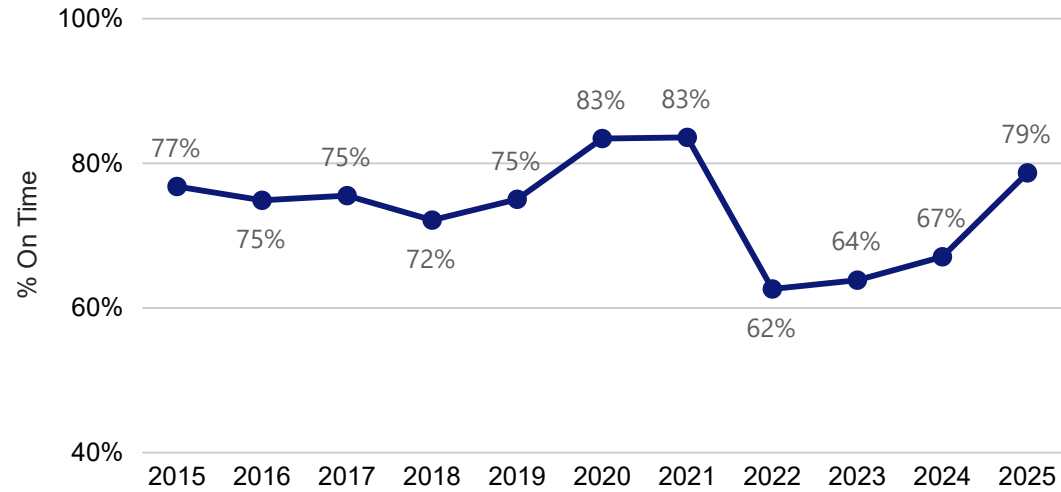


NB: Load Factor (%) represents the proportion of seats on a flight used on a flight i.e. Terminal Passengers / Total Seats.

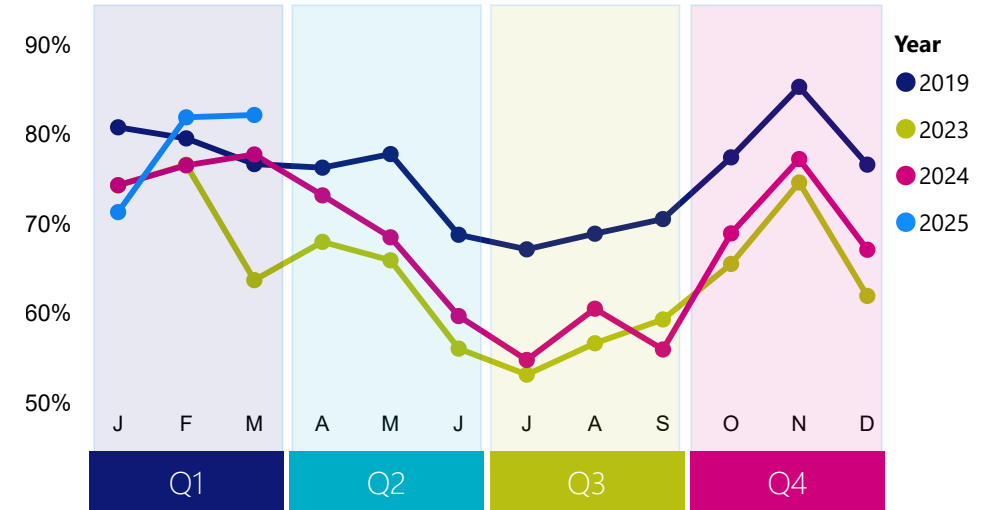
10 Year trends

Punctuality (NB: 2025 values are year-to-date and will update throughout the year)

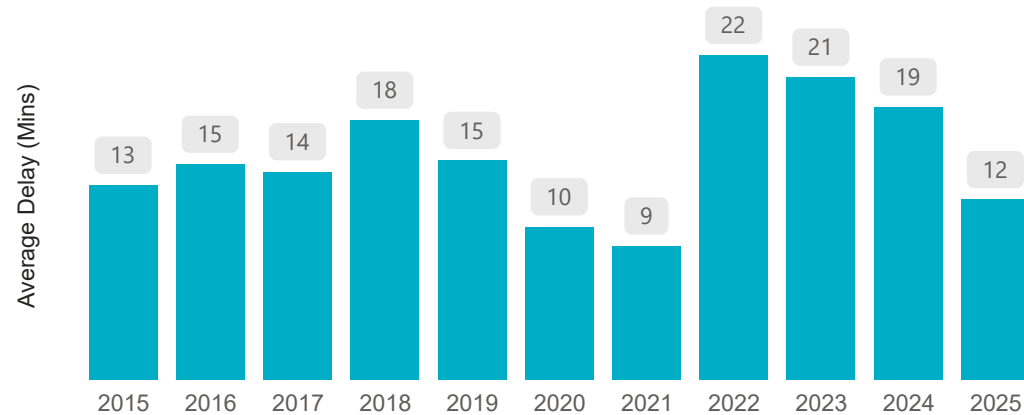
% On-time performance (OTP) <15mins



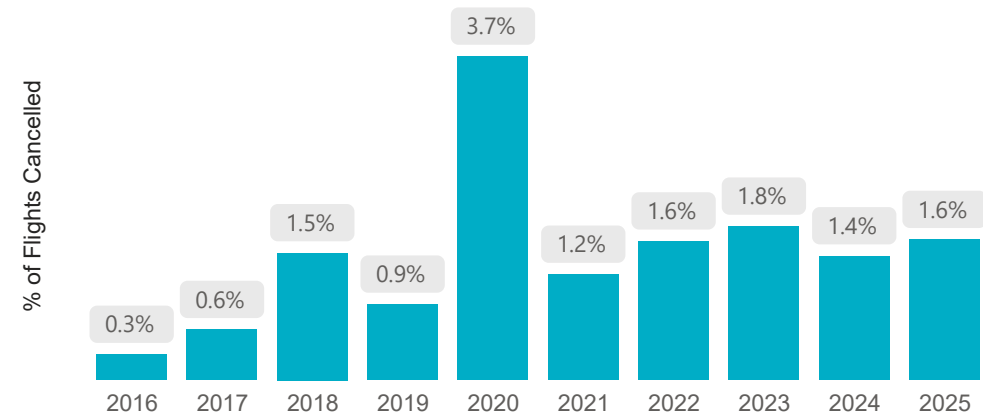
% OTP by month (last five years)



Average delay minutes per flight



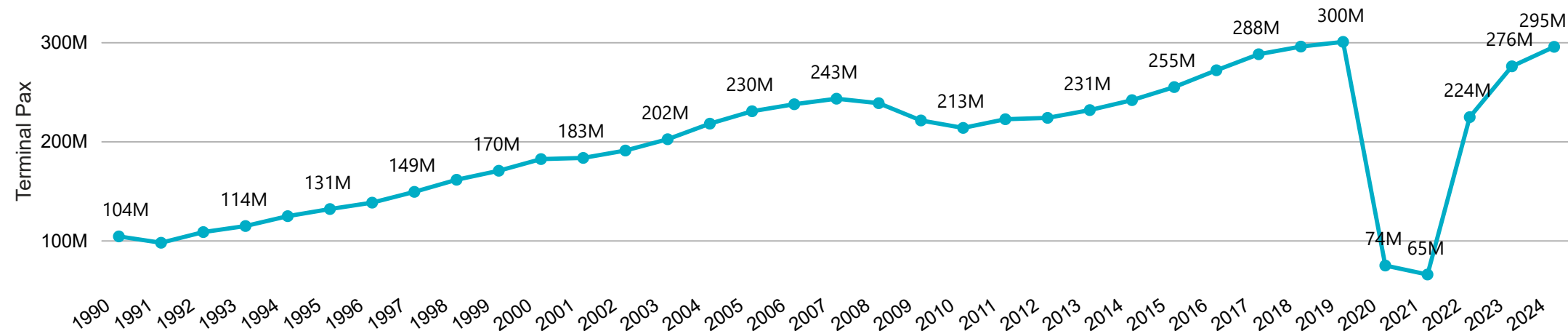
% of flights cancelled (within 24hr before departure)



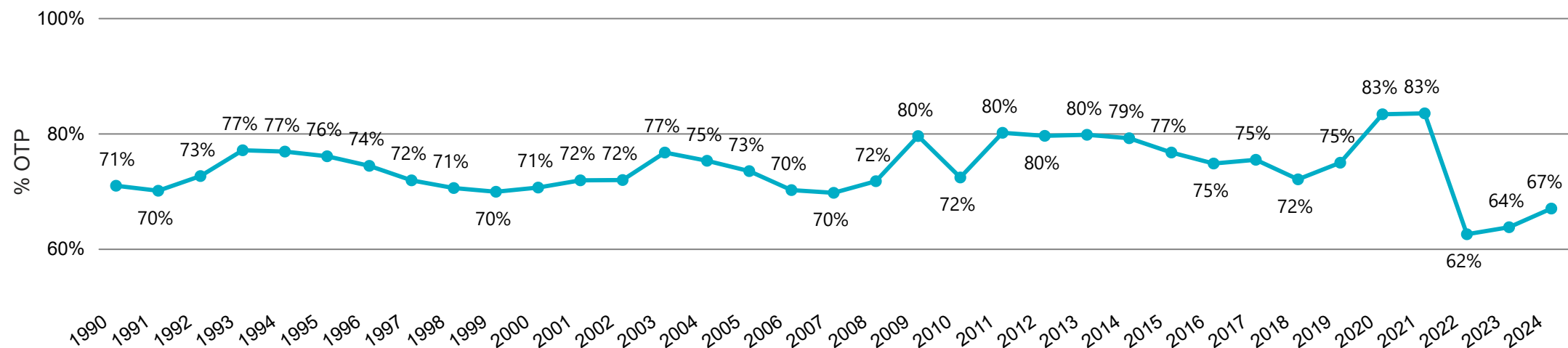
Trend since 1990 (30+ years)

Terminal Passengers and % On-Time Performance

Annual UK Terminal Passengers (1990 - 2024)



On-Time Performance (within 15mins of schedule)

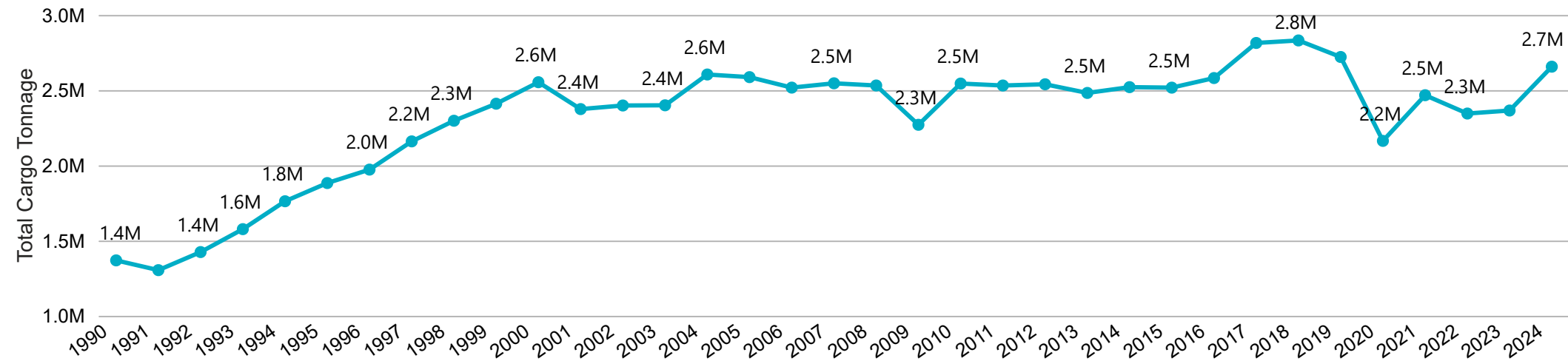


Trends since 1990 (30+ years)

Cargo Tonnage



Annual UK Cargo Tonnage (1990 - 2024)



Data Tables (Latest Quarter): *Terminal Passengers - Q1 2025*

Top 25 UK reporting airports		
Reporting Airport	Term. Passengers	% YoY
Heathrow	18,246,492	-1% ▼
Gatwick	8,431,725	1% ▲
Manchester	6,186,213	6% ▲
Stansted	6,134,369	1% ▲
Luton	3,658,588	7% ▲
Edinburgh	3,156,140	7% ▲
Birmingham	2,547,979	6% ▲
Bristol	1,980,938	6% ▲
Glasgow	1,547,512	5% ▲
Belfast Int'l	1,363,099	3% ▲
Liverpool	1,040,848	14% ▲
Newcastle	934,157	6% ▲
London City	790,909	5% ▲
Leeds Bradford	705,971	8% ▲
Belfast City	541,615	1% ▲
East Midlands	479,213	-20% ▼
Aberdeen	477,523	-0% ▼
Jersey	269,810	-0% ▼
Southampton	179,479	2% ▲
Bournemouth	169,152	19% ▲
Inverness	142,588	8% ▲
Isle Of Man	136,436	2% ▲
Guernsey	135,900	-1% ▼
Cardiff	131,087	-3% ▼
Prestwick	82,234	23% ▲
Total	59,469,977	2% ▲

Top 25 Airlines		
Airline (groups)	Term. Passengers	% YoY
EasyJet	11,923,241	7% ▲
Ryanair	11,415,079	5% ▲
British Airways	11,370,565	-4% ▼
Jet2.com	2,684,386	7% ▲
Wizz Air	2,641,846	2% ▲
Tui Airways	1,578,645	-3% ▼
Emirates	1,347,329	-1% ▼
Virgin Atlantic	1,328,697	8% ▲
Aer Lingus	1,075,615	6% ▲
KLM	1,034,762	6% ▲
Qatar Airways	814,984	-1% ▼
Vueling	728,633	6% ▲
American Airlines	651,752	-2% ▼
Lufthansa	580,154	-15% ▼
Loganair	537,591	-5% ▼
Turkish Airlines	449,014	-13% ▼
United Airlines	446,665	-4% ▼
Air India	428,390	28% ▲
Swiss Airlines	372,996	-4% ▼
Air Canada	339,143	-3% ▼
Etihad Airways	337,007	-4% ▼
SAS	329,460	-5% ▼
Air France	323,301	12% ▲
Saudi Arabian Airlines	312,115	32% ▲
Delta Airlines	301,142	8% ▲
Total	53,352,512	3% ▲

Top 25 international destinations		
OD Airport Name	Term. Passengers	% YoY
Dublin	2,222,605	-3% ▼
Amsterdam	1,979,330	3% ▲
Dubai	1,537,076	-0% ▼
Geneva	1,428,515	-2% ▼
Tenerife (Surreina Sofia)	1,424,688	3% ▲
Alicante	1,157,208	9% ▲
Paris (Charles De Gaulle)	1,105,590	10% ▲
Barcelona	977,522	0% ▲
Malaga	971,210	7% ▲
Doha Hamad	853,439	-7% ▼
Arrecife	841,012	3% ▲
Madrid	803,840	-0% ▼
New York (Jf Kennedy)	785,873	1% ▲
Lisbon	651,473	-2% ▼
Krakov	636,547	17% ▲
Istanbul	624,753	-1% ▼
Copenhagen	562,086	5% ▲
Zurich	519,639	2% ▲
Prague	518,275	17% ▲
Budapest	517,369	10% ▲
Berlin Brandenburg	515,823	7% ▲
Frankfurt Main	511,408	-10% ▼
Faro	489,729	-4% ▼
Rome (Fiumicino)	482,881	7% ▲
Las Palmas	469,107	-1% ▼

Data Tables (Latest Quarter): *ATM's* - Q1 2025

Top 25 UK Reporting Airports			
Reporting Airport	ATM's	% YoY	
Heathrow	115,689	1%	▲
Gatwick	53,693	2%	▲
Stansted	40,972	1%	▲
Manchester	39,984	8%	▲
Edinburgh	24,516	5%	▲
Luton	22,518	4%	▲
Birmingham	18,438	7%	▲
Glasgow	14,303	5%	▲
Bristol	13,836	3%	▲
Aberdeen	13,502	-4%	▼
London City	11,205	-6%	▼
Belfast Int'l	10,599	-1%	▼
East Midlands	7,928	-12%	▼
Liverpool	7,680	13%	▲
Newcastle	7,316	4%	▲
Belfast City	6,840	-2%	▼
Leeds Bradford	5,500	6%	▲
Guernsey	3,795	6%	▲
Southampton	3,615	-12%	▼
Jersey	3,422	-4%	▼
Norwich	3,090	22%	▲
Sumburgh	3,012	2%	▲
Kirkwall	2,426	3%	▲
Isle Of Man	2,061	2%	▲
Inverness	1,907	-12%	▼
Total	437,847	2%	▲

Top 25 international destinations			
OD Airport Name	ATM's	% YoY	
Amsterdam	18,543	-3%	▼
Dublin	18,185	-7%	▼
Geneva	10,539	-6%	▼
Paris (Charles De Gaulle)	9,497	13%	▲
Tenerife (Surreina Sofia)	8,566	10%	▲
Alicante	7,145	12%	▲
Barcelona	6,614	4%	▲
Malaga	6,193	12%	▲
Frankfurt Main	5,823	-11%	▼
Arrecife	5,273	10%	▲
Madrid	5,216	4%	▲
Zurich	4,856	8%	▲
Copenhagen	4,612	10%	▲
Lisbon	4,446	-3%	▼
Dubai	4,164	1%	▲
New York (Jf Kennedy)	4,161	-8%	▼
Istanbul	4,116	-0%	▼
Berlin Brandenburg	3,922	7%	▲
Krakow	3,766	20%	▲
Prague	3,604	22%	▲
Rome (Fiumicino)	3,430	17%	▲
Faro	3,268	-2%	▼
Budapest	3,213	12%	▲
Doha Hamad	3,129	-2%	▼
Las Palmas	2,935	4%	▲

ATM's by operation type			
Op. Type	ATM's	% YoY	
Scheduled	428,745	2%	▲
Charter	23,215	-1%	▼

ATM's by market			
Market	ATM's	% YoY	
W. Europe	243,463	2%	▲
Domestic	104,859	-1%	▼
RoW	43,220	12%	▲
E. Europe	33,164	6%	▲
N. America	27,260	-2%	▼

Data Tables (Latest Quarter): *Cargo Tonnage - Q1 2025*

Cargo Tonnage by UK reporting airport			
Reporting Airport	Cargo Tonnage	% YoY	
Heathrow	391,512	-1%	▼
East Midlands	91,365	6%	▲
Stansted	73,953	13%	▲
Gatwick	24,700	37%	▲
Manchester	20,364	10%	▲
Birmingham	12,895	83%	▲
Belfast Int'l	8,764	-9%	▼
Luton	7,125	-3%	▼
Bournemouth	6,915	47%	▲
Edinburgh	4,903	-41%	▼
Prestwick	2,441	5%	▲
Glasgow	2,228	68%	▲
Aberdeen	1,400	-36%	▼
Cardiff	1,262	587092%	
Newcastle	625	-56%	▼
Guernsey	557	-13%	▼
Teesside	429	0%	▲
Sumburgh	305	20%	▲
Inverness	292	-70%	▼
Kirkwall	280	25%	▲
Exeter	263	-66%	▼
Stornoway	197	-11%	▼
Benbecula	142	10%	▲
Jersey	112	-18%	▼
Islay	62	9%	▲
Total	653,091	4%	

Top 25 international destinations			
OD Airport Name	Cargo Tonnage	% YoY	
New York (Jf Kennedy)	36,143	8%	▲
Doha Hamad	29,973	11%	▲
Leipzig	29,924	-7%	▼
Dubai	28,651	-20%	▼
Los Angeles International	19,845	-1%	▼
Delhi	14,343	29%	▲
Cologne Bonn	13,921	16%	▲
Mumbai	13,457	-2%	▼
Shanghai (Pu Dong)	12,658	18%	▲
Istanbul	12,166	9%	▲
Miami International	12,043	21%	▲
Cincinnati	11,717	8%	▲
Hong Kong (Chek Lap Kok)	11,293	12%	▲
Chicago (O'Hare)	10,836	-4%	▼
Brussels	10,769	18%	▲
Guangzhou Baiyun International	10,667	-13%	▼
Singapore	10,614	-9%	▼
Abu Dhabi International	10,199	32%	▲
Paris (Charles De Gaulle)	9,394	-1%	▼
New York (Newark)	9,179	44%	▲
Memphis	8,797	15%	▲
Toronto	8,794	-1%	▼
Dallas/Fort Worth	8,645	15%	▲
Philadelphia International	8,077	25%	▲
Tokyo (Haneda)	8,047	-11%	▼

Cargo Tonnage by operation type			
Op. Type	Cargo Tonnage	% YoY	
Scheduled	615,460	3%	▲
Charter	37,717	8%	▲

Cargo Tonnage by market			
Market	Cargo Tonnage	% YoY	
RoW	290,636	1%	▲
N. America	219,238	15%	▲
W. Europe	114,634	-0%	▼
Domestic	27,410	-24%	▼
E. Europe	1,259	-0%	▼