



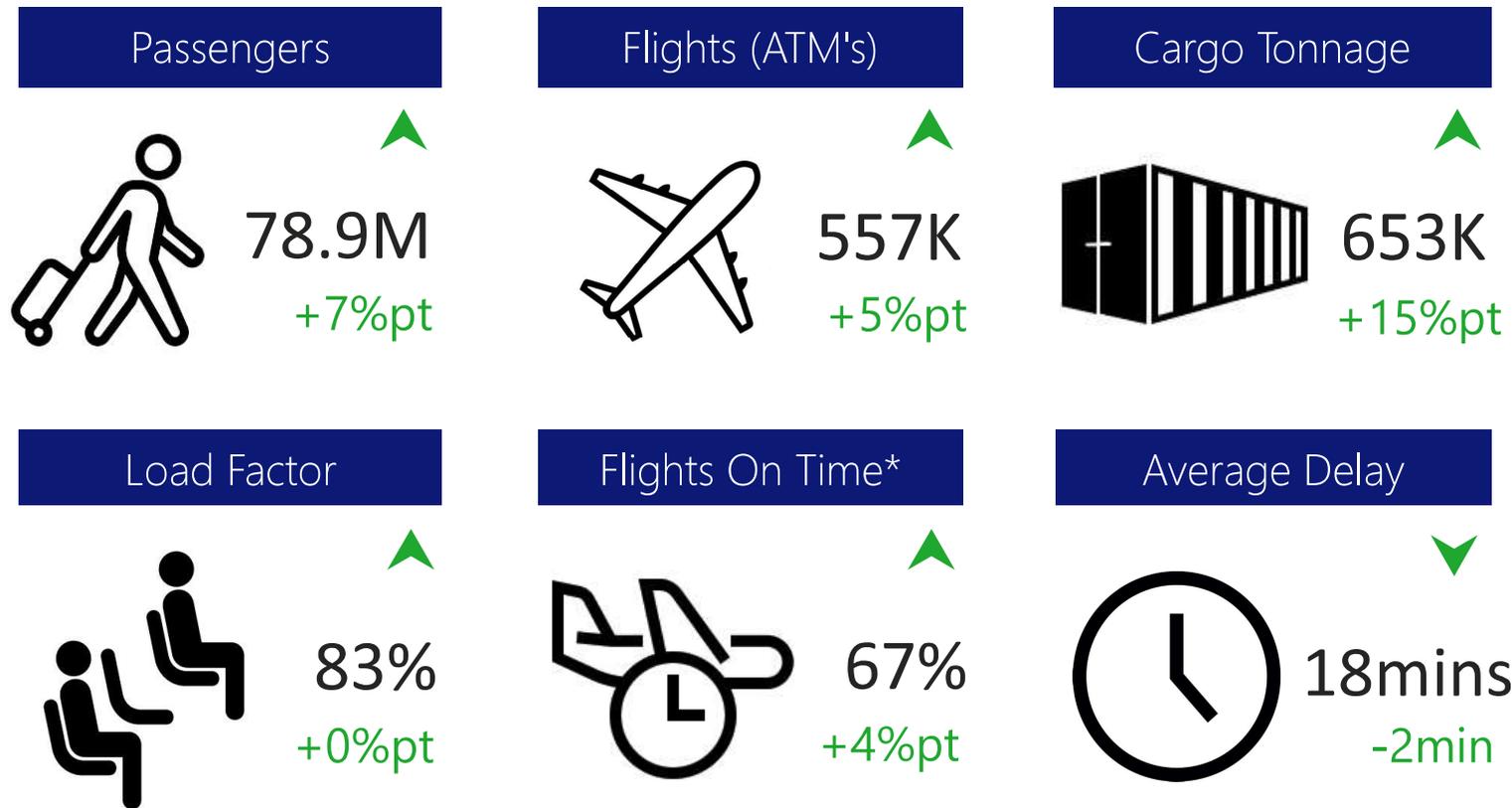
CAA Aviation Trends Quarter 2 2024

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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)**
 - 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 - Q2 2024 (vs 2023)



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.

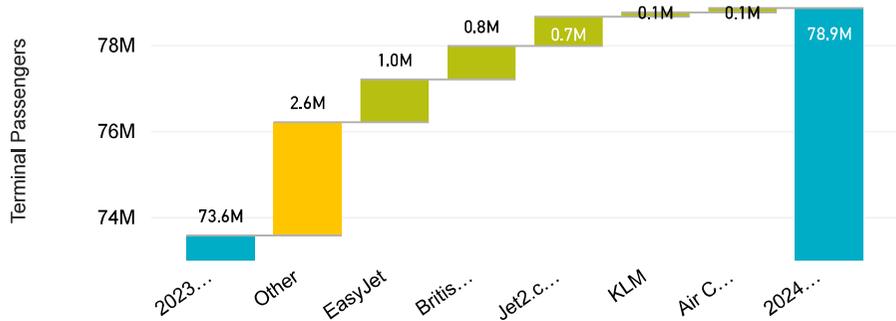
* A flight is considered "on time" if it arrives or departs the gate within 15 minutes of the scheduled time.

Terminal passengers Q2 2024

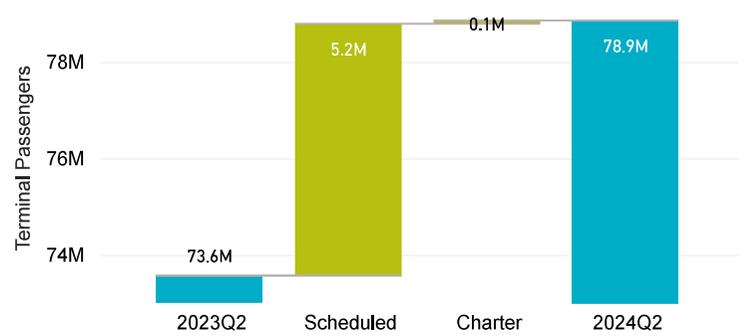
Year-on-year comparison



Terminal passengers by airline

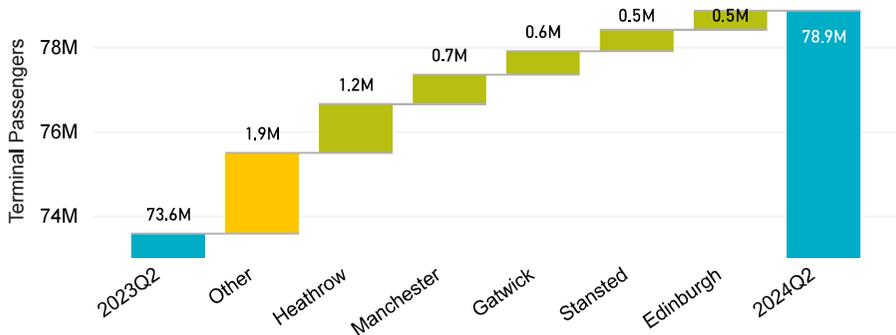


Terminal passengers by scheduled & charter services

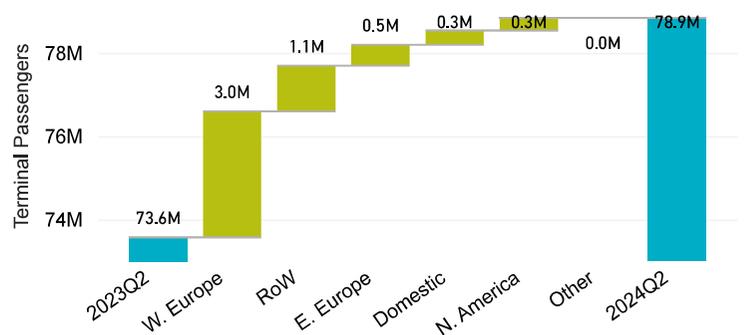


The number of terminal passengers in Q2 was 78.9M up from 73.6M in the same period last year.

Terminal passengers by reporting airport



Terminal passengers by market



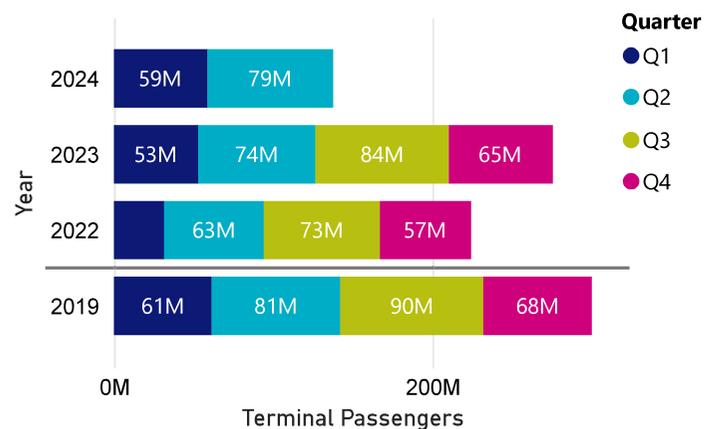
The charts on this page show the distribution of passenger growth across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

Terminal passengers

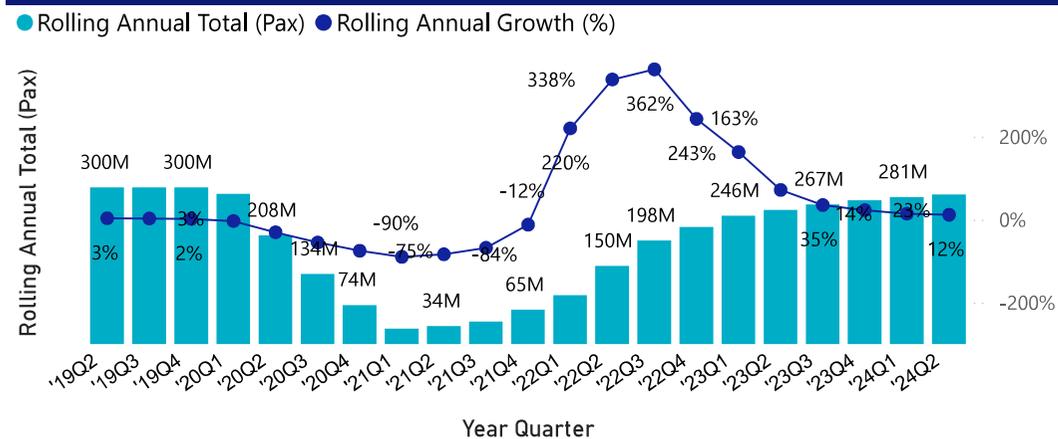
5 Year Trend



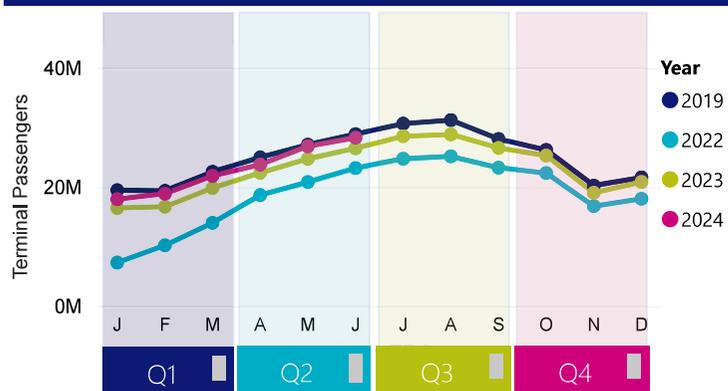
Quarterly



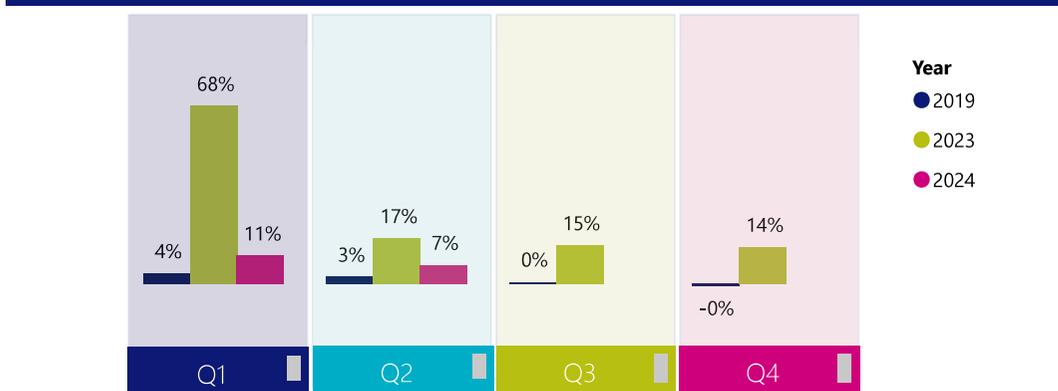
Rolling 12-month total



Monthly



Year-on-year % Variance

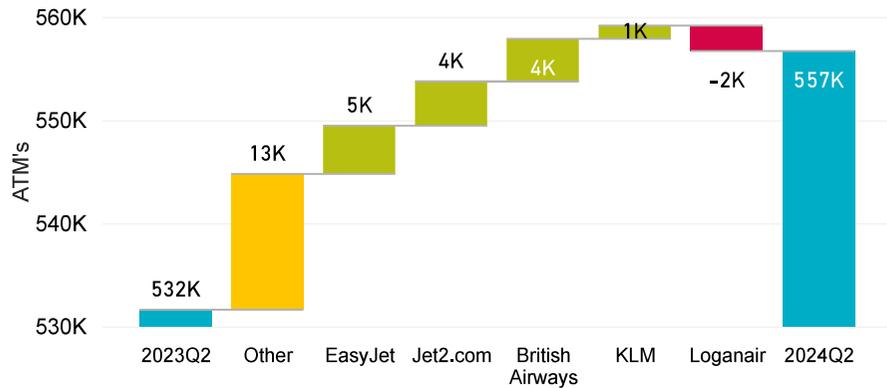


Air Transport Movements (ATM's) - Q2 2024

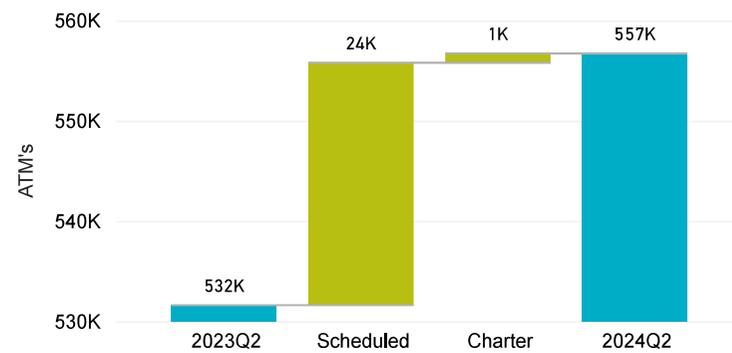
Year-on-year comparison



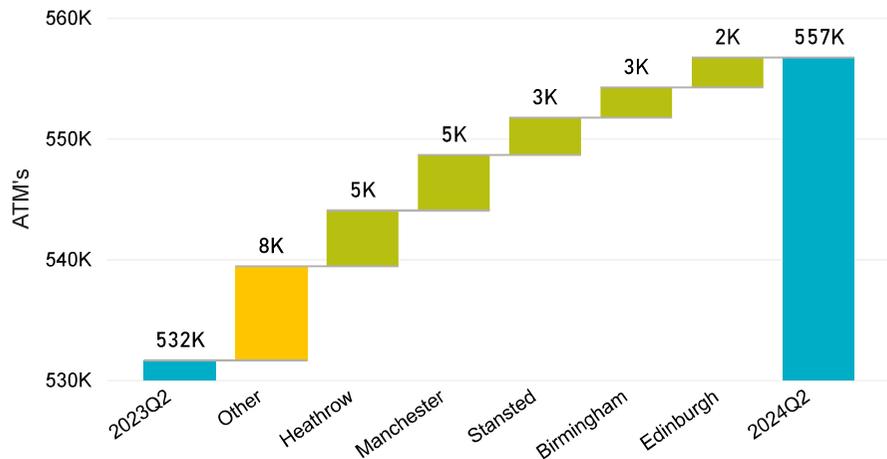
ATM's by airline



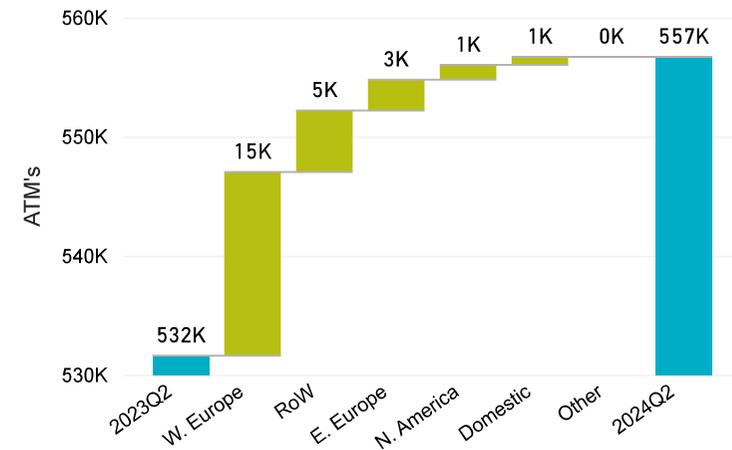
ATM's by scheduled & charter operation



ATM's by reporting airport



ATM's by market



The number of ATM's in Q2 was 557K up from 532K in the same period last year.

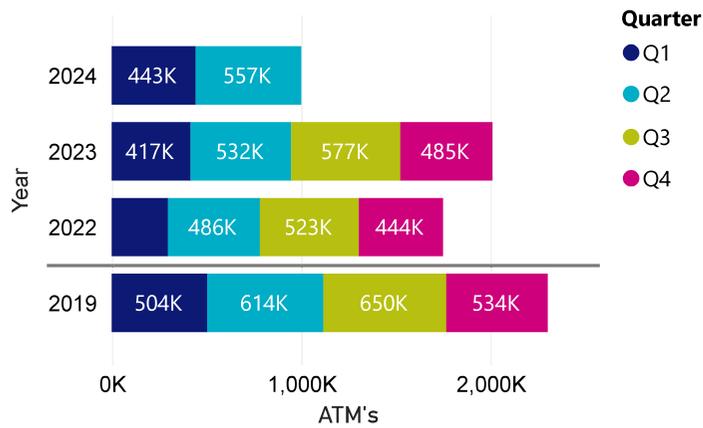
The charts on this page show how ATM growth is distributed across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

Air Transport Movements (ATM's)

5 Year Trend



Quarterly



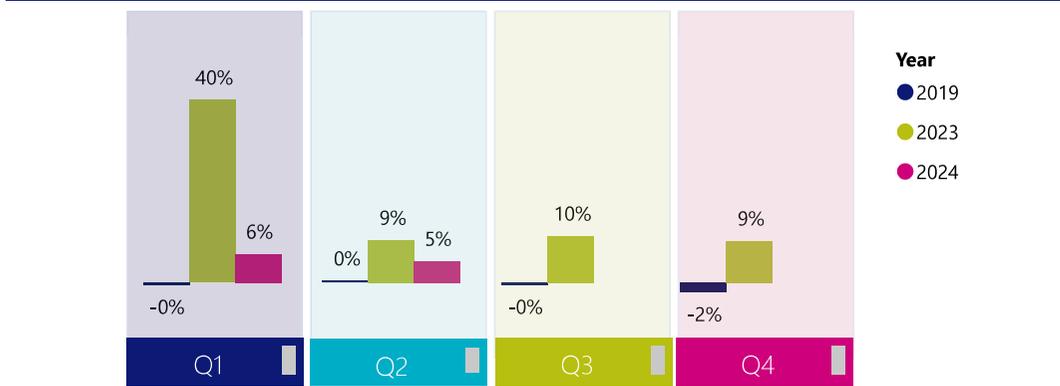
Rolling 12-month total



Monthly



Year-on-year % Variance

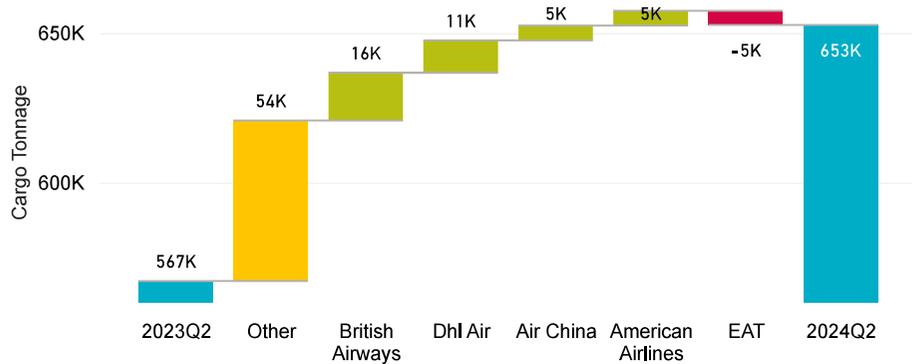


Cargo Tonnage - Q2 2024

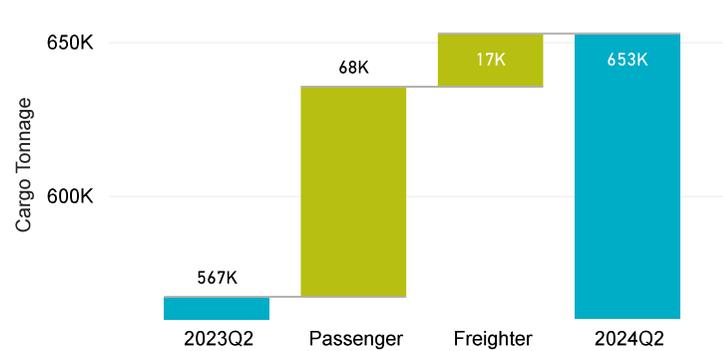
Year-on-year comparison



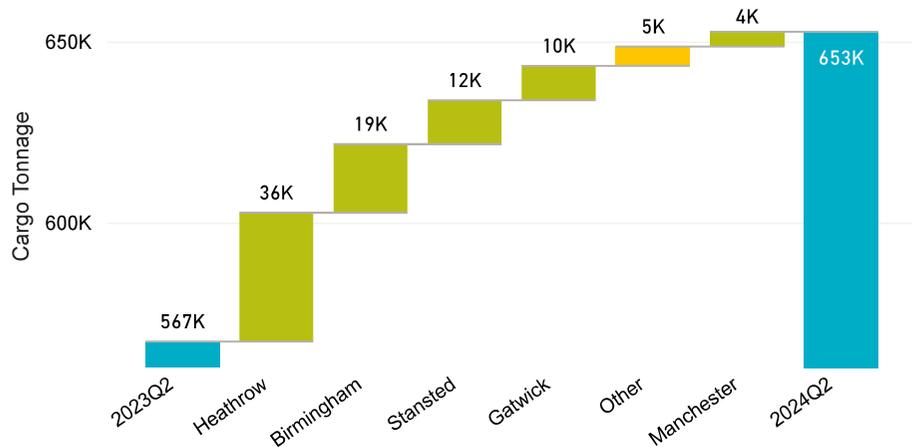
Cargo tonnage by airline



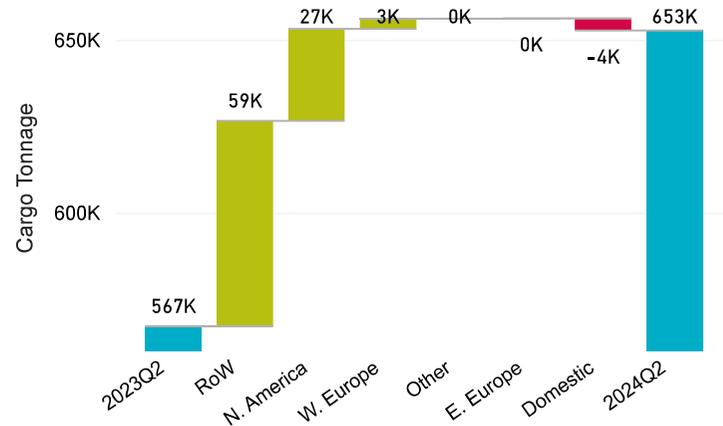
Cargo tonnage by passenger & freighter services



Cargo tonnage by reporting airport



Cargo tonnage by market



Cargo Tonnage in Q2 was 653K up from 567K in the same period last year.

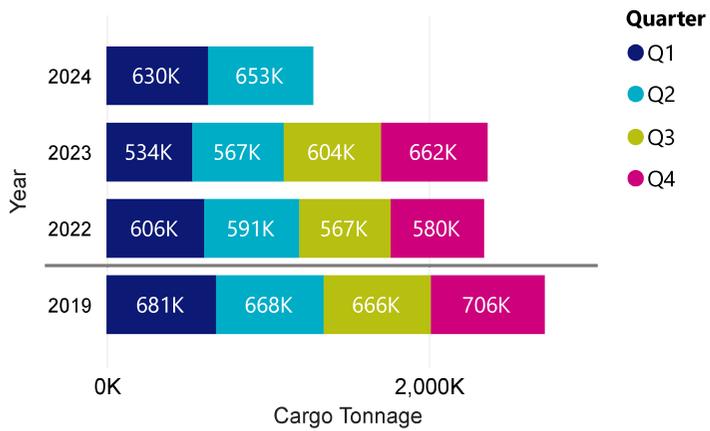
The charts on this page show how cargo tonnage growth is distributed across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

Cargo Tonnage

5 Year Trend



Quarterly



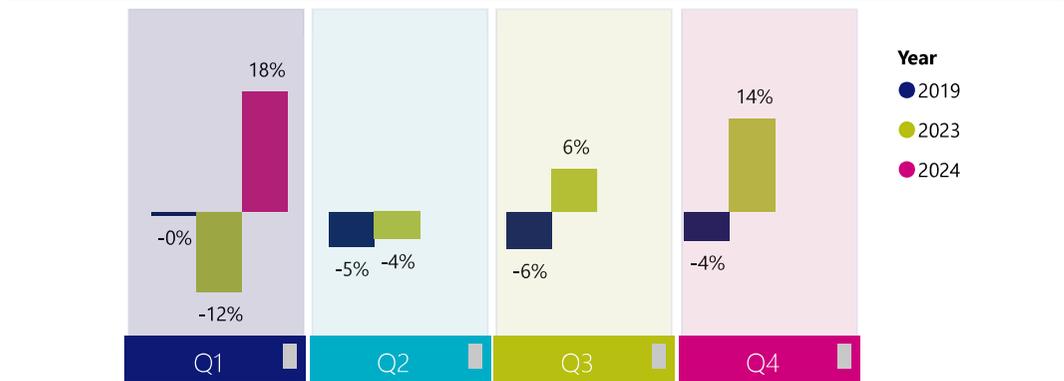
Rolling 12-month total



Monthly



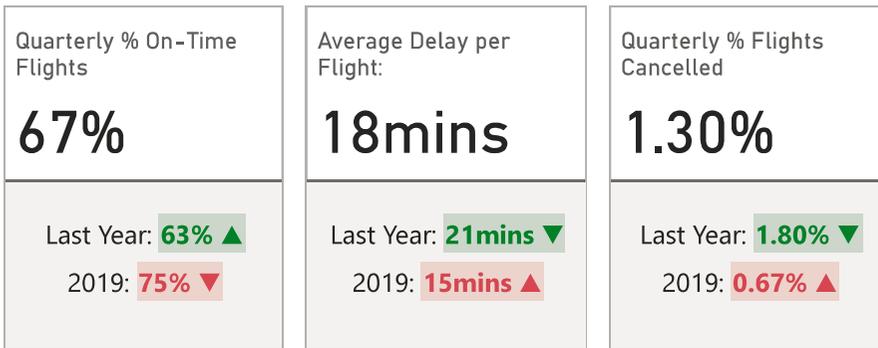
Year-on-year % Variance



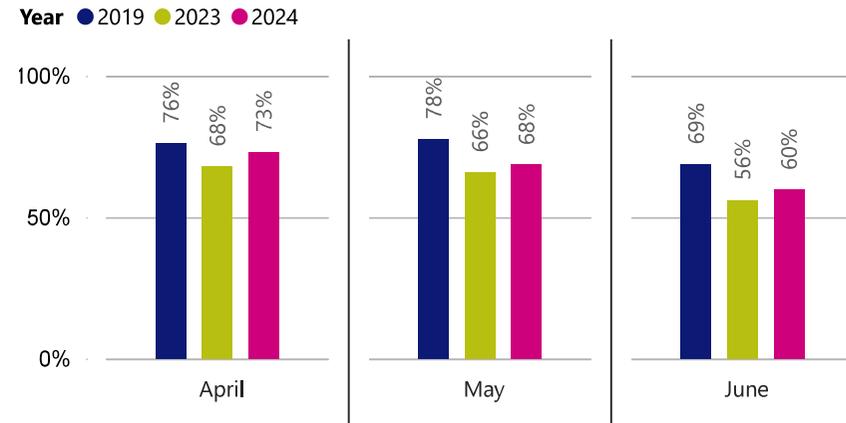
Punctuality Trends - Q2 2024

vs Last Year & 2019

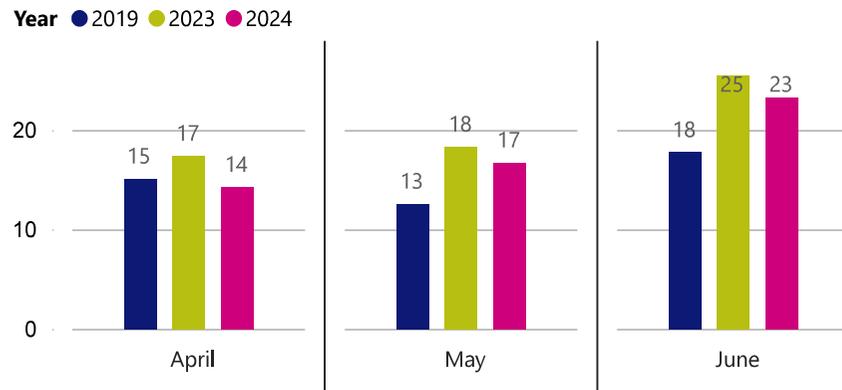
Quarterly Results



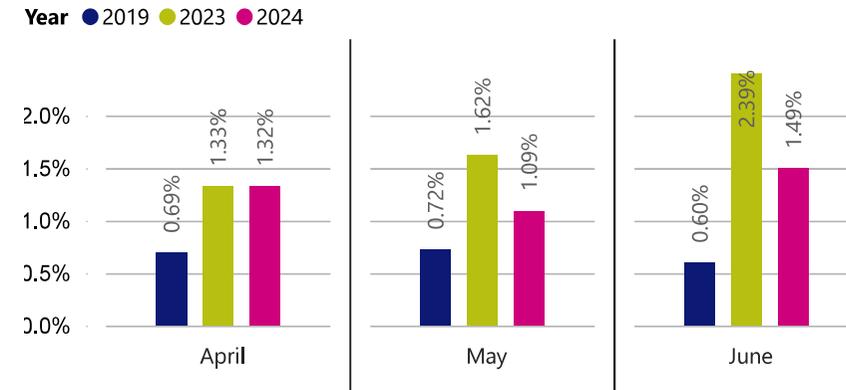
% On-Time Flights (within 15mins of schedule)



Average Delay per Flight (mins)

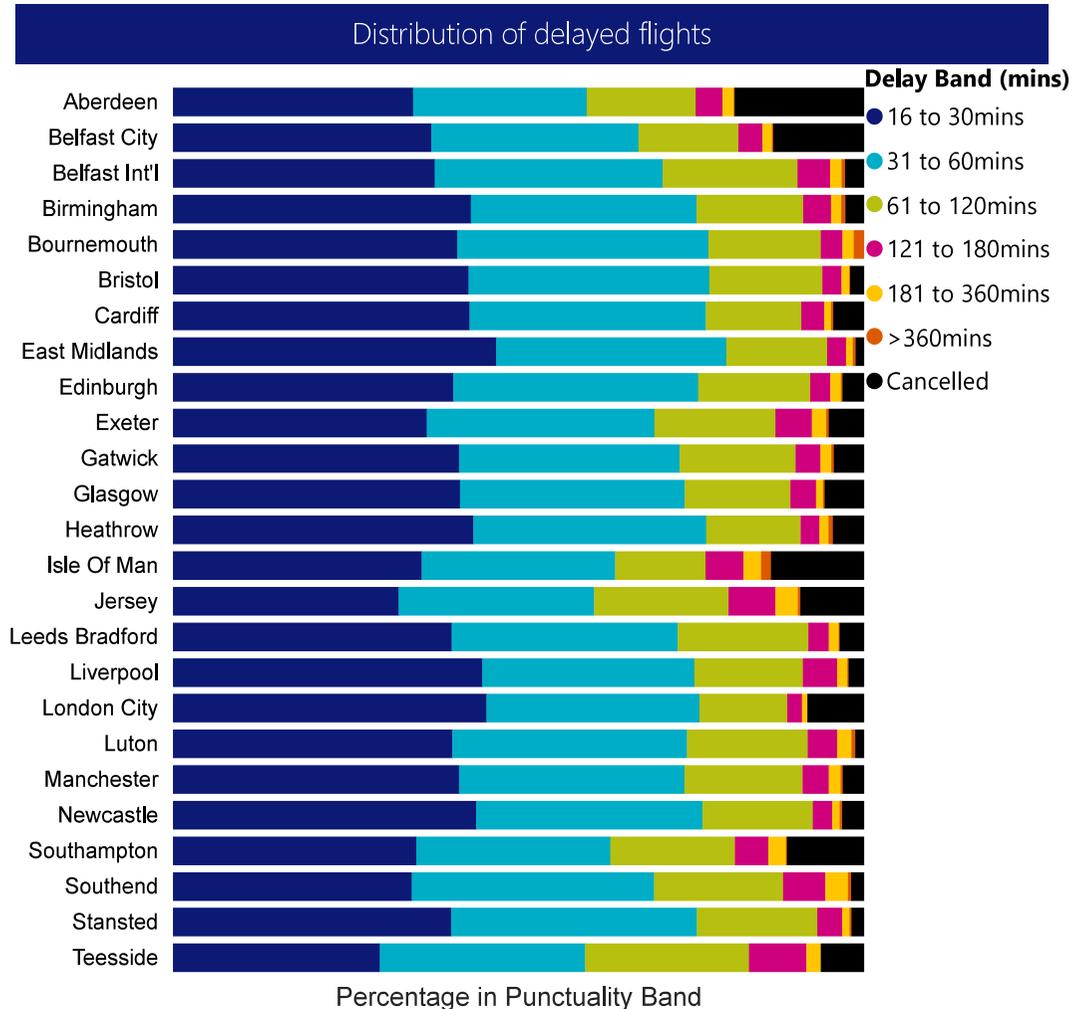
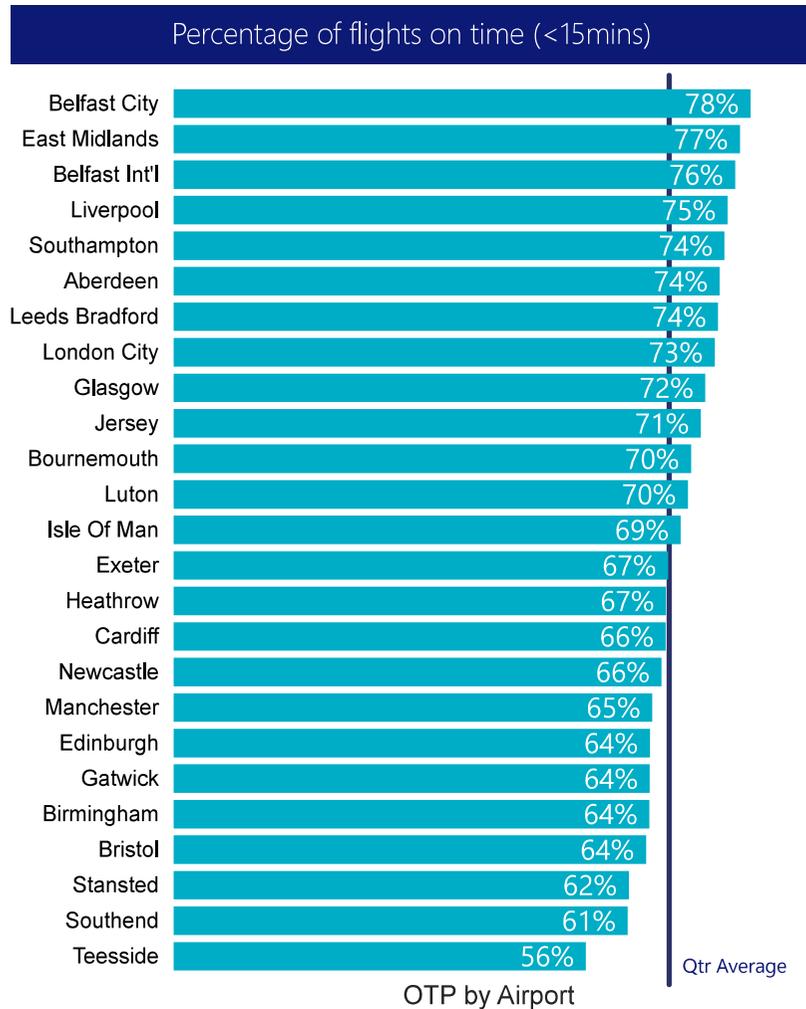


% Flights Cancelled (inside 24hr before departure)



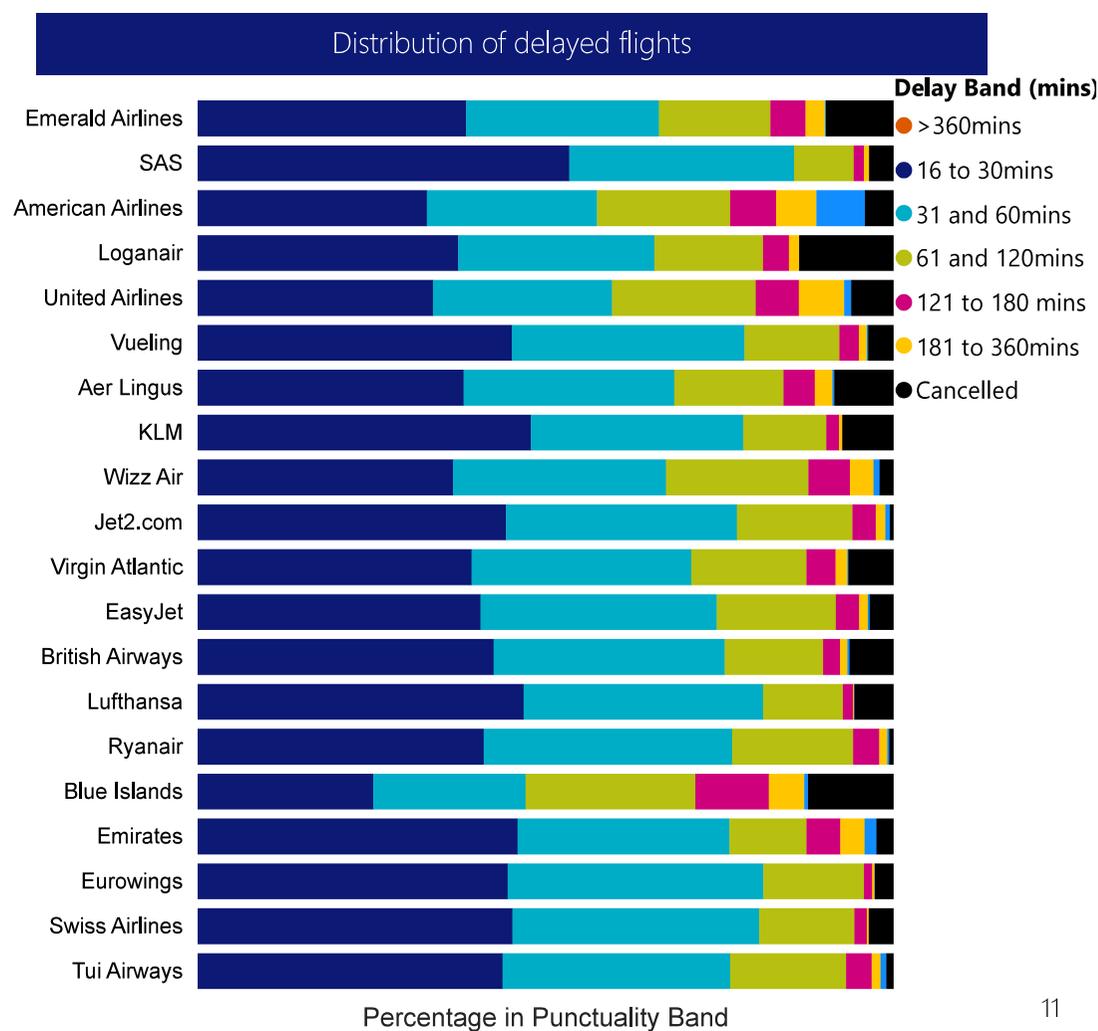
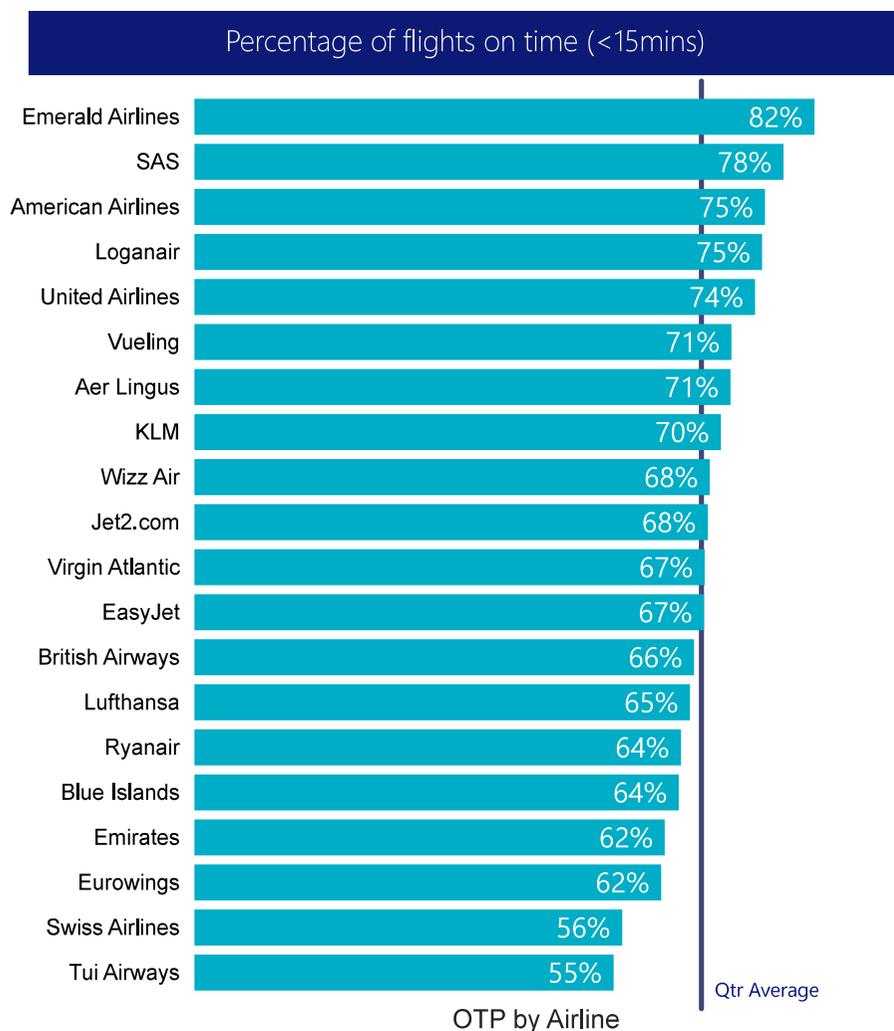
Flight Punctuality - Q2 2024 (UK Arrivals & Departures)

CAA (UK) reporting airports



Flight Punctuality - Q2 2024 (UK Arrivals & Departures)

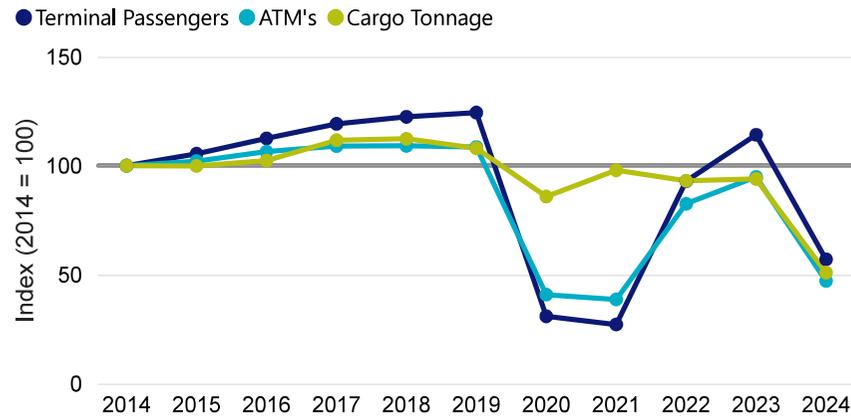
Top 20 largest airlines by ATM's



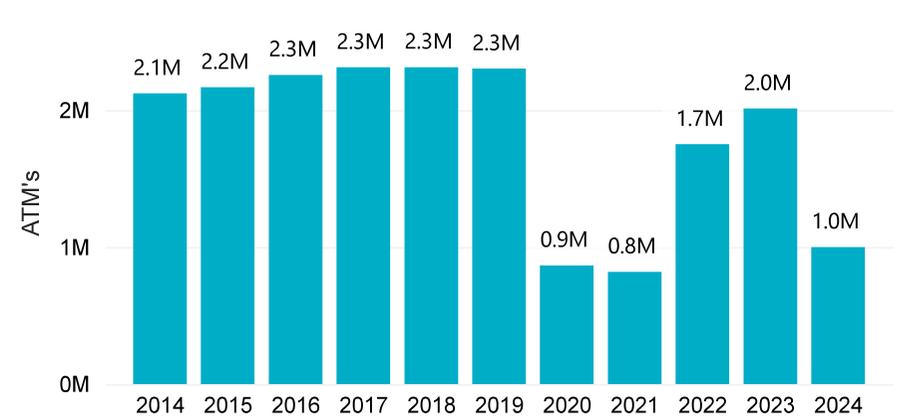
10 year trends

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

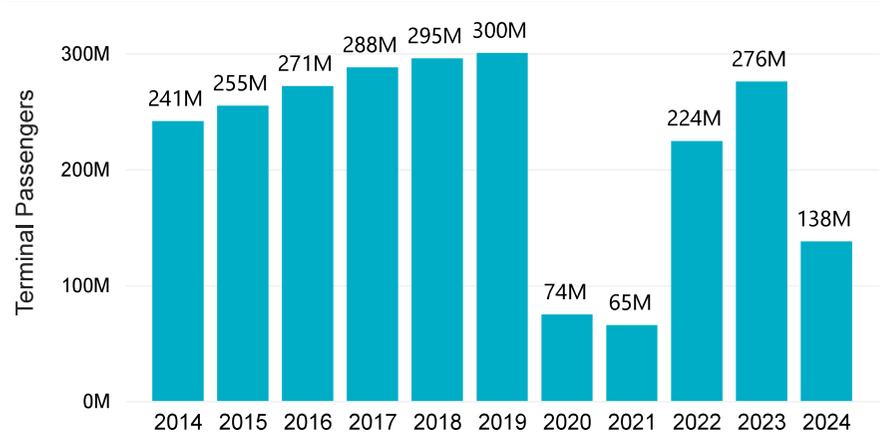
Indexed passenger, ATM and cargo growth (2014 = 100)



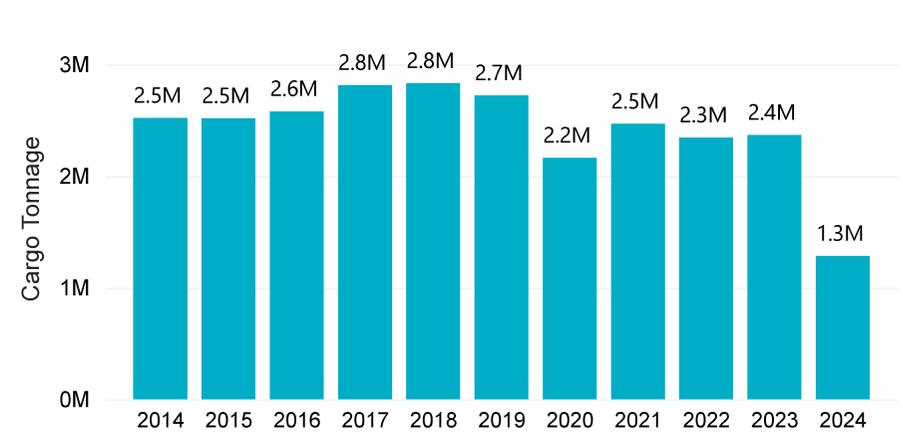
ATM's (millions)



Terminal passengers (millions)



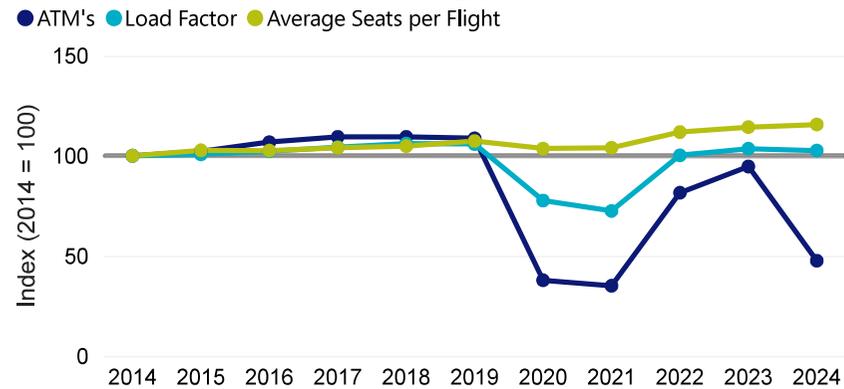
Cargo tonnage (millions)



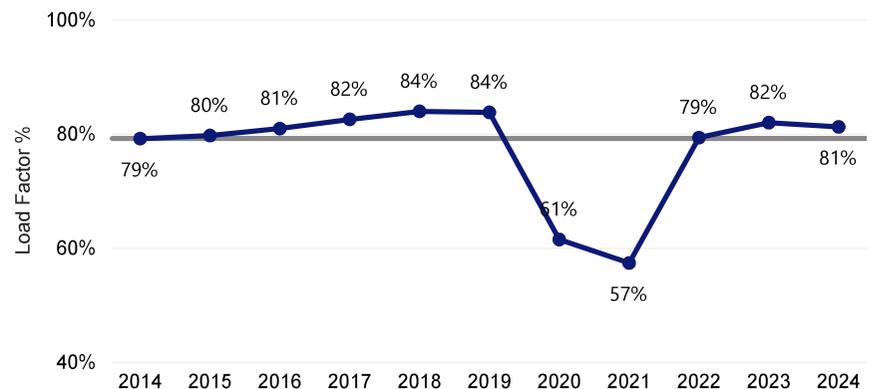
10 Year trends

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

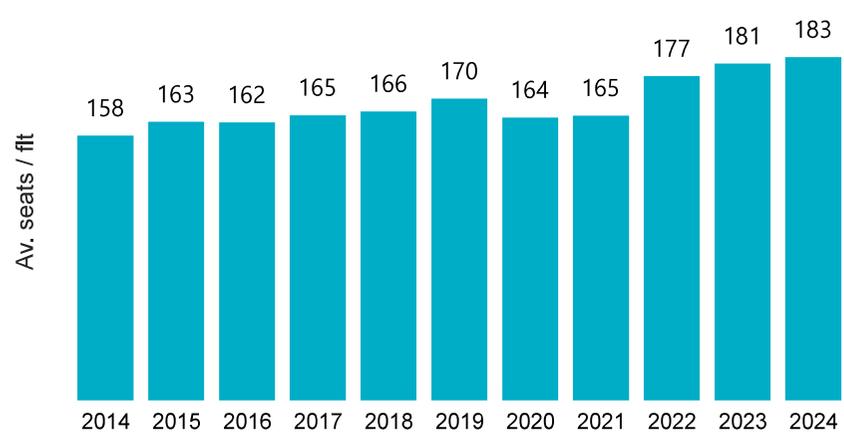
Indexed ATM, load factor and average seats per flight (2014 = 100)



Average load factor (%)



Average seats per flight

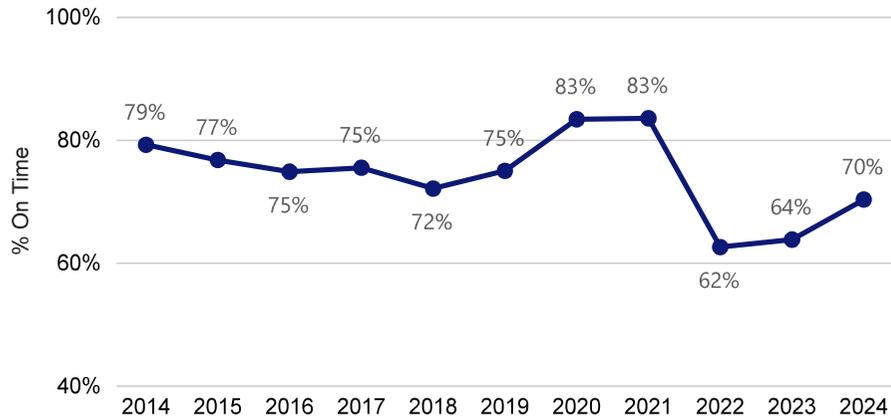


NB: Load Factor (%) represents the proportion of seats on a flight used on a flight i.e. Terminal Passengers / Total Seats.

10 Year trends

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

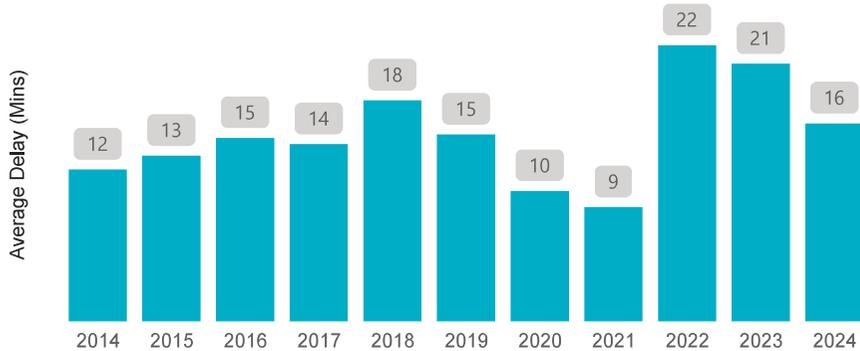
% On-time performance (OTP) <15mins



% OTP by month (last five years)



Average delay minutes per flight



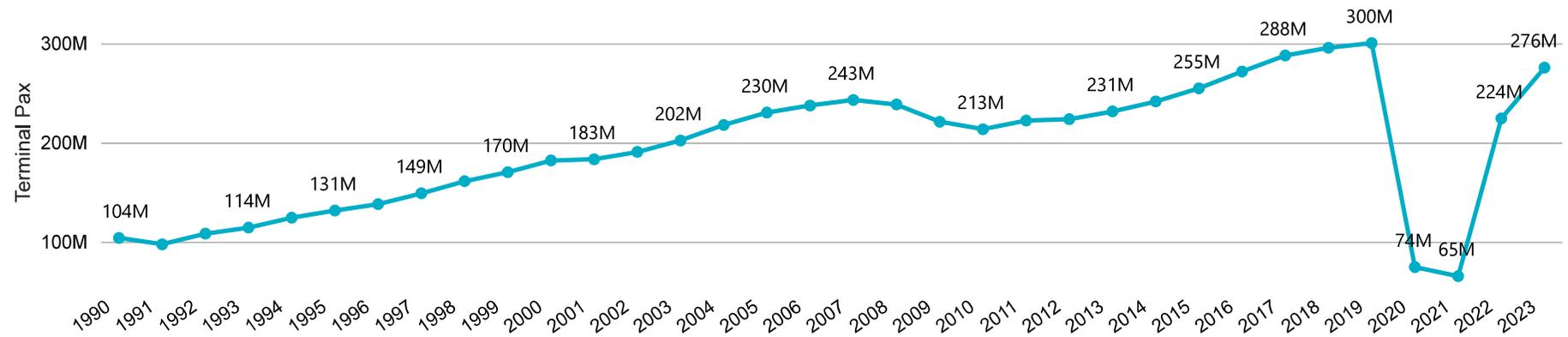
% of flights cancelled (within 24hr before departure)



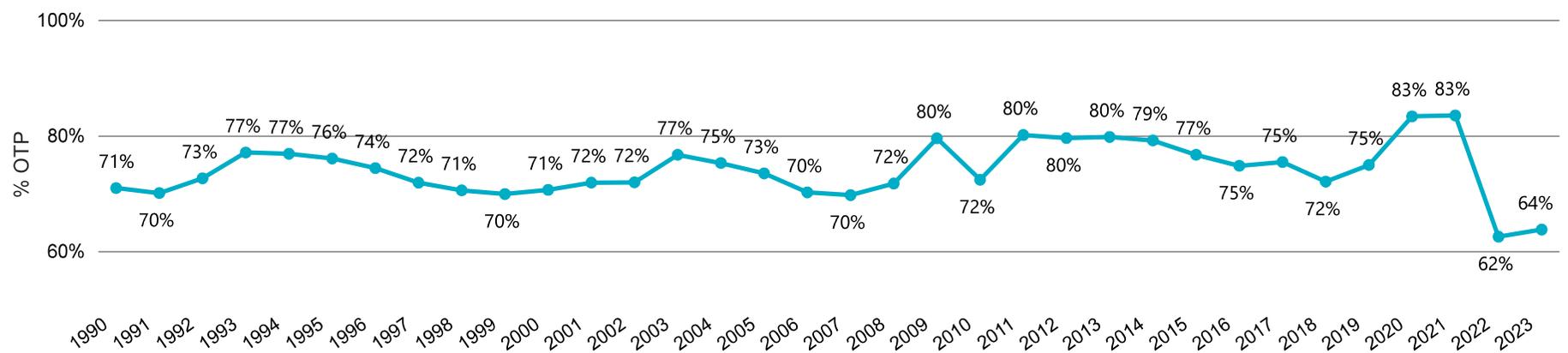
Trend since 1990 (30+ years)

Terminal Passengers and % On-Time Performance

Annual UK Terminal Passengers (1990 - 2023)



On-Time Performance (within 15mins of schedule)

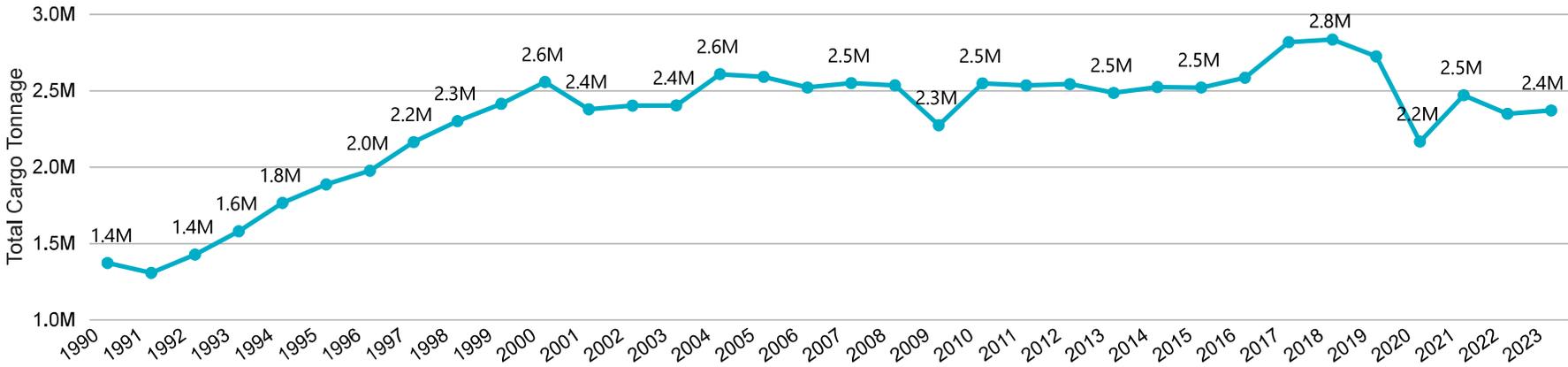


Trends since 1990 (30+ years)

Cargo Tonnage



Annual UK Cargo Tonnage (1990 - 2023)



Data Tables (Latest Quarter): Terminal Passengers - Q2 2024



| Top 25 UK reporting airports | | |
|------------------------------|-------------------|-------------|
| Reporting Airport | Term. Passengers | % Var. |
| Heathrow | 21,325,243 | 6% ▲ |
| Gatwick | 11,583,007 | 5% ▲ |
| Manchester | 8,167,391 | 9% ▲ |
| Stansted | 7,999,240 | 7% ▲ |
| Luton | 4,622,388 | 3% ▲ |
| Edinburgh | 4,337,606 | 12% ▲ |
| Birmingham | 3,429,881 | 15% ▲ |
| Bristol | 3,028,988 | 8% ▲ |
| Glasgow | 2,263,645 | 9% ▲ |
| Belfast Int'l | 1,812,644 | 7% ▲ |
| Liverpool | 1,448,396 | 26% ▲ |
| Newcastle | 1,430,576 | 6% ▲ |
| East Midlands | 1,265,679 | 6% ▲ |
| Leeds Bradford | 1,214,662 | 7% ▲ |
| London City | 930,623 | 1% ▲ |
| Belfast City | 615,252 | 19% ▲ |
| Aberdeen | 604,320 | 2% ▲ |
| Jersey | 402,135 | -1% ▼ |
| Bournemouth | 332,153 | 19% ▲ |
| Cardiff | 248,663 | 6% ▲ |
| Inverness | 236,945 | -2% ▼ |
| Southampton | 222,998 | 15% ▲ |
| Guernsey | 184,473 | -1% ▼ |
| Isle Of Man | 178,781 | 2% ▲ |
| Prestwick | 170,719 | -4% ▼ |
| Total | 78,056,408 | 7% ▲ |

| Top 25 Airlines | | |
|-------------------|-------------------|-------------|
| Airline (groups) | Term. Passengers | % Var. |
| EasyJet | 15,940,581 | 7% ▲ |
| Ryanair | 15,057,979 | 8% ▲ |
| British Airways | 13,330,595 | 6% ▲ |
| Jet2.com | 5,834,275 | 13% ▲ |
| Tui Airways | 3,427,103 | 4% ▲ |
| Wizz Air | 2,917,902 | -3% ▼ |
| Virgin Atlantic | 1,477,134 | 8% ▲ |
| Emirates | 1,302,408 | 5% ▲ |
| KLM | 1,158,067 | 10% ▲ |
| Aer Lingus | 1,152,123 | 2% ▲ |
| American Airlines | 1,054,596 | -3% ▼ |
| Lufthansa | 956,987 | 7% ▲ |
| Vueling | 946,890 | 13% ▲ |
| Qatar Airways | 789,387 | 28% ▲ |
| United Airlines | 717,971 | -8% ▼ |
| Loganair | 717,120 | -10% ▼ |
| Turkish Airlines | 558,132 | -2% ▼ |
| Air Canada | 467,059 | 1% ▲ |
| Norwegian | 466,420 | -10% ▼ |
| SAS | 462,202 | 8% ▲ |
| Delta Airlines | 460,427 | -4% ▼ |
| Sunexpress | 404,976 | 101% ▲ |
| Eurowings | 394,654 | 15% ▲ |
| Swiss Airlines | 388,115 | -3% ▼ |
| Air France | 347,496 | -5% ▼ |
| Total | 70,730,599 | 6% ▲ |

| Top 25 international destinations | | |
|-----------------------------------|------------------|--------|
| OD Airport Name | Term. Passengers | % Var. |
| Dublin | 2,484,903 | 2% ▲ |
| Amsterdam | 2,206,241 | 6% ▲ |
| Palma De Mallorca | 2,028,926 | 6% ▲ |
| Alicante | 1,753,659 | 11% ▲ |
| Malaga | 1,676,114 | 4% ▲ |
| Faro | 1,437,306 | 1% ▲ |
| Dubai | 1,396,616 | 3% ▲ |
| Barcelona | 1,354,014 | 12% ▲ |
| Tenerife (Surreina Sofia) | 1,342,712 | 10% ▲ |
| New York (Jf Kennedy) | 1,151,924 | 6% ▲ |
| Antalya | 1,142,299 | 23% ▲ |
| Paris (Charles De Gaulle) | 1,077,511 | 13% ▲ |
| Dalaman | 874,223 | 12% ▲ |
| Doha Hamad | 858,228 | 29% ▲ |
| Lisbon | 858,063 | 7% ▲ |
| Madrid | 855,754 | 7% ▲ |
| Arrecife | 802,752 | 8% ▲ |
| Frankfurt Main | 747,153 | 2% ▲ |
| Istanbul | 743,740 | 17% ▲ |
| Copenhagen | 724,339 | 10% ▲ |
| Ibiza | 642,723 | -0% ▼ |
| Berlin Brandenburg | 621,868 | 19% ▲ |
| Geneva | 620,724 | 4% ▲ |
| Nice | 598,263 | 3% ▲ |
| Rome (Fiumicino) | 592,964 | 13% ▲ |

Data Tables (Latest Quarter): ATM's - Q2 2024



| Top 25 UK Reporting Airports | | | |
|------------------------------|----------------|-----------|----------|
| Reporting Airport | ATM's | % Var. | |
| Heathrow | 122,058 | 4% | ▲ |
| Gatwick | 71,358 | 4% | ▲ |
| Manchester | 50,703 | 10% | ▲ |
| Stansted | 50,350 | 7% | ▲ |
| Edinburgh | 32,094 | 8% | ▲ |
| Luton | 27,804 | 3% | ▲ |
| Birmingham | 23,626 | 12% | ▲ |
| Bristol | 19,895 | 3% | ▲ |
| Glasgow | 18,347 | 5% | ▲ |
| Aberdeen | 15,996 | 6% | ▲ |
| Belfast Int'l | 14,184 | 6% | ▲ |
| London City | 12,670 | -4% | ▼ |
| East Midlands | 12,583 | -7% | ▼ |
| Newcastle | 10,247 | 2% | ▲ |
| Liverpool | 9,898 | 15% | ▲ |
| Leeds Bradford | 8,765 | 10% | ▲ |
| Belfast City | 7,859 | 8% | ▲ |
| Jersey | 4,884 | -1% | ▼ |
| Guernsey | 4,815 | 12% | ▲ |
| Southampton | 4,505 | -1% | ▼ |
| Sumburgh | 3,458 | 16% | ▲ |
| Norwich | 3,443 | -13% | ▼ |
| Inverness | 3,031 | -9% | ▼ |
| Isle Of Man | 2,621 | -10% | ▼ |
| Kirkwall | 2,561 | -4% | ▼ |
| Total | 537,755 | 5% | ▲ |

| Top 25 international destinations | | | |
|-----------------------------------|--------|--------|---|
| OD Airport Name | ATM's | % Var. | |
| Dublin | 20,688 | -1% | ▼ |
| Amsterdam | 19,860 | 5% | ▲ |
| Palma De Mallorca | 12,330 | 7% | ▲ |
| Alicante | 10,122 | 11% | ▲ |
| Malaga | 9,899 | 3% | ▲ |
| Paris (Charles De Gaulle) | 9,644 | 15% | ▲ |
| Faro | 8,753 | 3% | ▲ |
| Barcelona | 8,626 | 15% | ▲ |
| Tenerife (Surreina Sofia) | 7,419 | 11% | ▲ |
| Frankfurt Main | 6,690 | -0% | ▼ |
| Antalya | 6,520 | 19% | ▲ |
| New York (Jf Kennedy) | 5,605 | 8% | ▲ |
| Lisbon | 5,307 | 3% | ▲ |
| Copenhagen | 5,303 | 10% | ▲ |
| Dalaman | 5,136 | 10% | ▲ |
| Madrid | 4,951 | 1% | ▲ |
| Geneva | 4,730 | -3% | ▼ |
| Arrecife | 4,653 | 12% | ▲ |
| Nice | 4,323 | 1% | ▲ |
| Berlin Brandenburg | 4,313 | 23% | ▲ |
| Istanbul | 4,286 | 11% | ▲ |
| Ibiza | 4,184 | -3% | ▼ |
| Rome (Fiumicino) | 3,965 | 16% | ▲ |
| Dubai | 3,945 | 7% | ▲ |
| Doha Hamad | 3,223 | 31% | ▲ |

| ATM's by operation type | | | |
|-------------------------|---------|--------|---|
| Op. Type | ATM's | % Var. | |
| Scheduled | 523,540 | 5% | ▲ |
| Charter | 33,162 | 3% | ▲ |

| ATM's by market | | | |
|-----------------|---------|--------|---|
| Market | ATM's | % Var. | |
| W. Europe | 324,386 | 5% | ▲ |
| Domestic | 120,954 | 1% | ▲ |
| RoW | 40,983 | 14% | ▲ |
| E. Europe | 37,519 | 7% | ▲ |
| N. America | 32,859 | 4% | ▲ |

Data Tables (Latest Quarter): *Cargo Tonnage - Q2 2024*



| Cargo Tonnage by UK reporting airport | | |
|---------------------------------------|----------------|------------|
| Reporting Airport | Cargo Tonnage | % Var. |
| Heathrow | 371,063 | 11% ▲ |
| East Midlands | 86,472 | -4% ▼ |
| Stansted | 78,108 | 18% ▲ |
| Gatwick | 27,098 | 55% ▲ |
| Birmingham | 24,083 | 367% ▲ |
| Manchester | 22,061 | 23% ▲ |
| Belfast Int'l | 9,823 | 10% ▲ |
| Edinburgh | 8,802 | 6% ▲ |
| Luton | 8,015 | 31% ▲ |
| Bournemouth | 5,230 | 216% ▲ |
| Prestwick | 2,597 | -9% ▼ |
| Aberdeen | 2,174 | 492% ▲ |
| Glasgow | 1,850 | 13% ▲ |
| Newcastle | 1,604 | 85% ▲ |
| Inverness | 1,030 | -6% ▼ |
| Exeter | 735 | -0% ▼ |
| Guernsey | 638 | 7% ▲ |
| Sumburgh | 290 | 4% ▲ |
| Stornoway | 252 | -4% ▼ |
| Kirkwall | 241 | -7% ▼ |
| Benbecula | 141 | 5% ▲ |
| Jersey | 135 | -75% ▼ |
| Islay | 95 | -4% ▼ |
| Teesside | 65 | 4180% ▲ |
| Alderney | 24 | -2% ▼ |
| Total | 652,625 | 15% |

| Top 25 international destinations | | |
|-----------------------------------|---------------|--------|
| OD Airport Name | Cargo Tonnage | % Var. |
| New York (Jf Kennedy) | 34,611 | 22% ▲ |
| Dubai | 32,919 | 11% ▲ |
| Leipzig | 31,146 | 27% ▲ |
| Doha Hamad | 29,042 | 4% ▲ |
| Los Angeles International | 21,858 | 21% ▲ |
| Shanghai (Pu Dong) | 15,200 | 73% ▲ |
| Chicago (O'Hare) | 15,094 | -5% ▼ |
| Istanbul | 14,290 | 10% ▲ |
| Hong Kong (Chek Lap Kok) | 13,665 | 25% ▲ |
| Cologne Bonn | 13,582 | -15% ▼ |
| Bahrain | 12,755 | 39% ▲ |
| Baku (Heyder Aliyev Int'L) | 12,550 | 533% ▲ |
| Guangzhou Baiyun International | 11,548 | -5% ▼ |
| Singapore | 11,029 | 14% ▲ |
| Abu Dhabi International | 10,692 | -2% ▼ |
| Mumbai | 10,471 | 21% ▲ |
| Cincinnati | 10,366 | 38% ▲ |
| Paris (Charles De Gaulle) | 10,222 | -5% ▼ |
| Toronto | 10,070 | 17% ▲ |
| Miami International | 10,026 | 29% ▲ |
| Beijing | 9,090 | 85% ▲ |
| Delhi | 9,083 | 10% ▲ |
| Brussels | 8,885 | 15% ▲ |
| Memphis | 8,400 | 5% ▲ |
| Tokyo (Haneda) | 8,138 | 10% ▲ |

| Cargo Tonnage by operation type | | |
|---------------------------------|---------------|--------|
| Op. Type | Cargo Tonnage | % Var. |
| Scheduled | 620,053 | 15% ▲ |
| Charter | 32,632 | 23% ▲ |

| Cargo Tonnage by market | | |
|-------------------------|---------------|--------|
| Market | Cargo Tonnage | % Var. |
| RoW | 307,958 | 24% ▲ |
| N. America | 192,521 | 16% ▲ |
| W. Europe | 117,378 | 3% ▲ |
| Domestic | 33,518 | -10% ▼ |
| E. Europe | 1,310 | -1% ▼ |