CAA Aviation Trends
Quarter 2 2025

Latest Quarter

Key Performance Indicators (KPIs)

Terminal Passengers

Air Transport Movements (ATM's)

Cargo Tonnage

Punctuality

10 Year Trends

Trend since 1990 (30+ years)

Data Tables (Latest Quarter)

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/departed 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 2025 (vs 2024)

Passengers	Flights (ATM's)	Cargo Tonnage
▲ 81.0M +3%	▲ 560K +1%	▲ 684K +6%

Load Factor	Flights On Time*	Average Delay
▲ 83% +0%pt	▲ 75% +8%pt	▼ 13min -5min
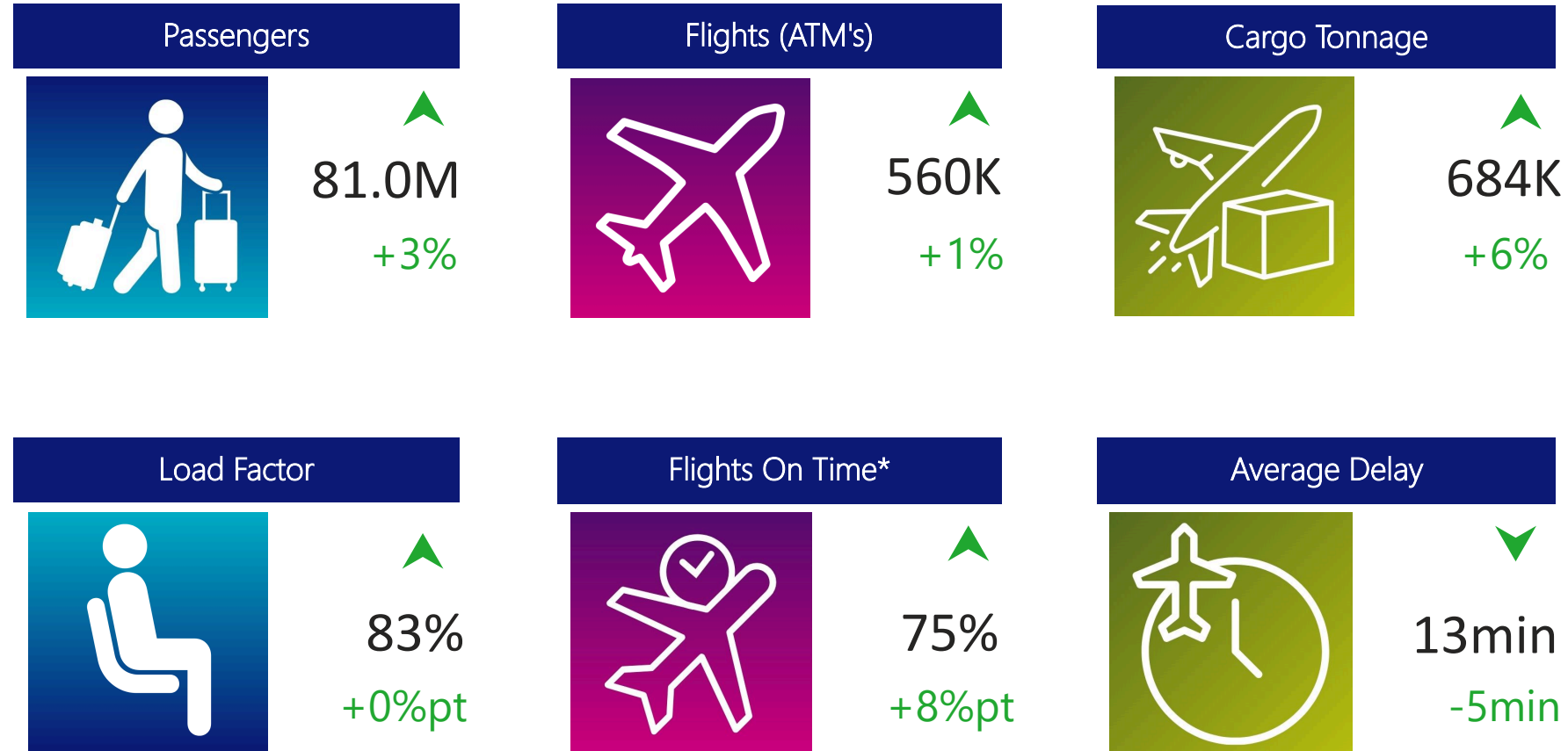
The figures on the left show the number of passengers, air transport movements (ATMs) and cargo volumes for the quarter. The load factor (the percentage of seats occupied on flights) and punctuality metrics are also displayed.
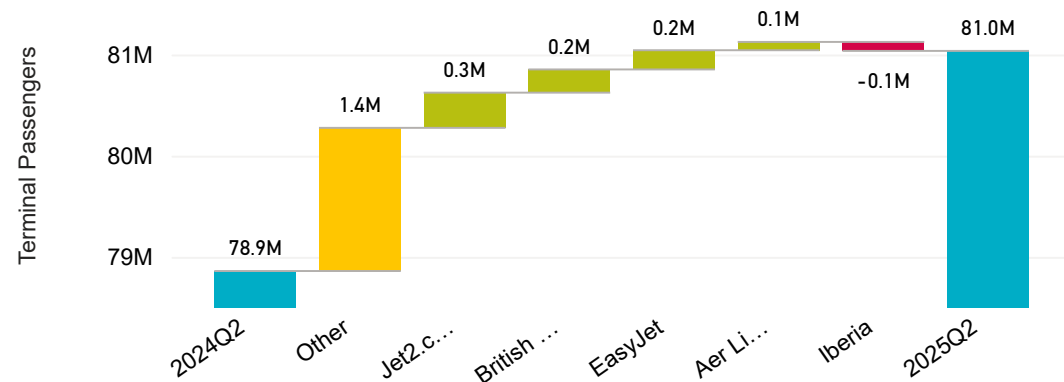
The text in green or red show growth rates relative to the same period last year.

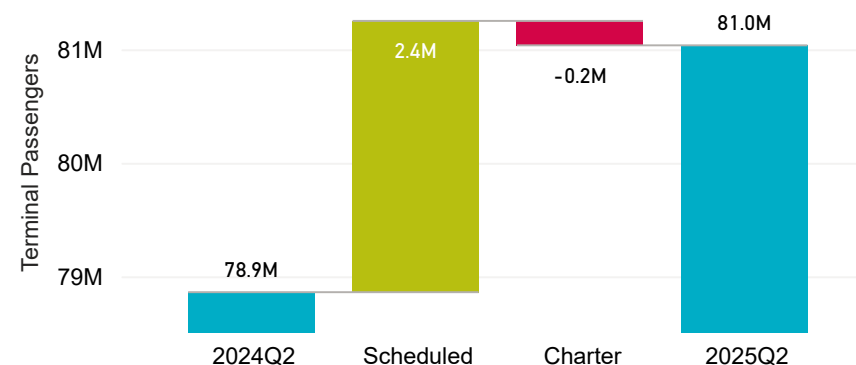* A flight is considered "on time" if it arrives or departs the gate within 15 minutes of the scheduled time.

Terminal passengers Q2 2025

Year-on-year comparison
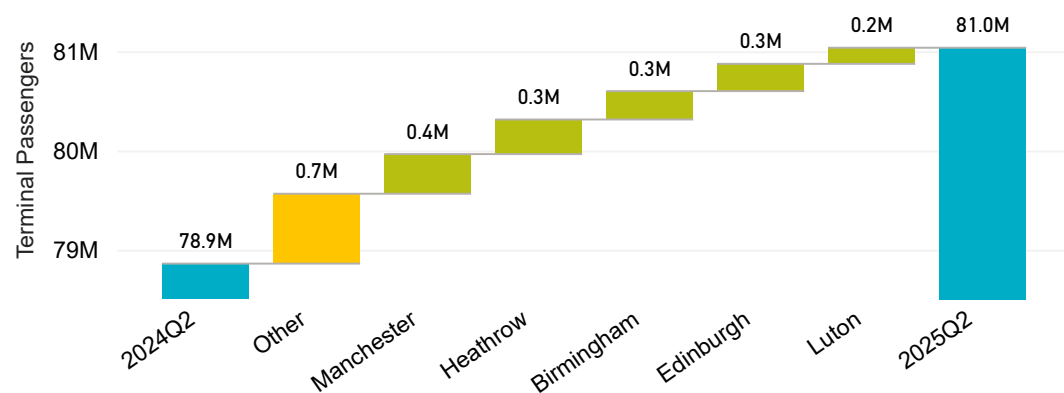
Terminal passengers by airline

Terminal passengers by scheduled & charter services

Terminal passengers by reporting airport

Terminal passengers by market

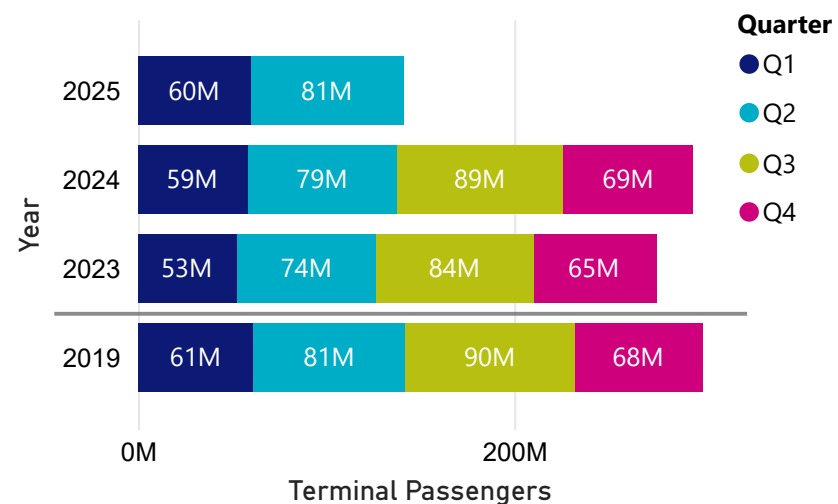The number of terminal passengers in Q2 was 81.0M up from 78.9M in the same period last year.
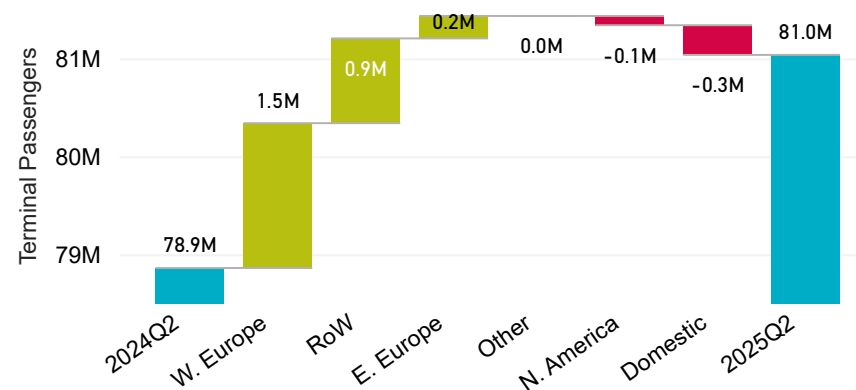
The charts on this page show the distribution of passenger growth across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

Terminal passengers

5 Year Trend

Quarterly

Year	Q1	Q2	Q3	Q4
2025	60M	81M		
2024	59M	79M	89M	69M
2023	53M	74M	84M	65M
2019	61M	81M	90M	68M

Terminal Passengers

Rolling 12-month total

● Rolling Annual Total (Pax) ● Rolling Annual Growth (%)

300M, 288M, 208M, 134M, 74M, 34M, 65M, 150M, 198M, 246M, 267M, 281M, 291M, 296M

3%, 3%, 2%, -90%, 75%, -12%, 220%, 338%, 362%, 243%, 163%, 71%, 14%, 23%, 9%, 4%

Monthly

● 2019 ● 2023 ● 2024 ● 2025

Q1 — J F M | Q2 — A M J | Q3 — J A S | Q4 — O N D

Year-on-year % Variance

● 2019 ● 2023 ● 2024 ● 2025

Q1: 4%, 68%, 11%, 2%
Q2: 3%, 17%, 7%, 3%
Q3: 0%, 15%, 6%
Q4: -0%, 14%, 6%

4
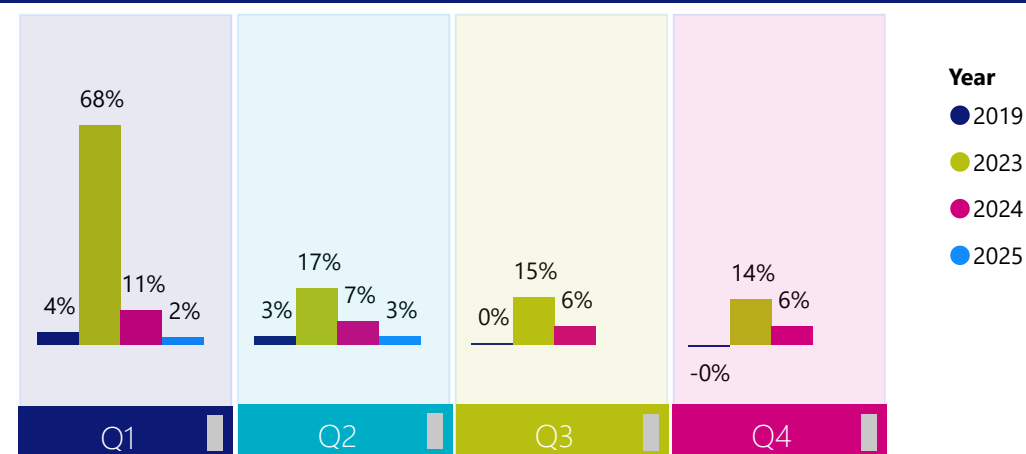
Air Transport Movements (ATM's) - Q2 2025

Year-on-year comparison

ATM's by airline

2024Q2: 557K
Other: 4K
Jet2.com: 3K
Aer Lingus: 1K
Loganair: -1K
Bristow Helico…: -1K
EasyJet: -2K
2025Q2: 560K
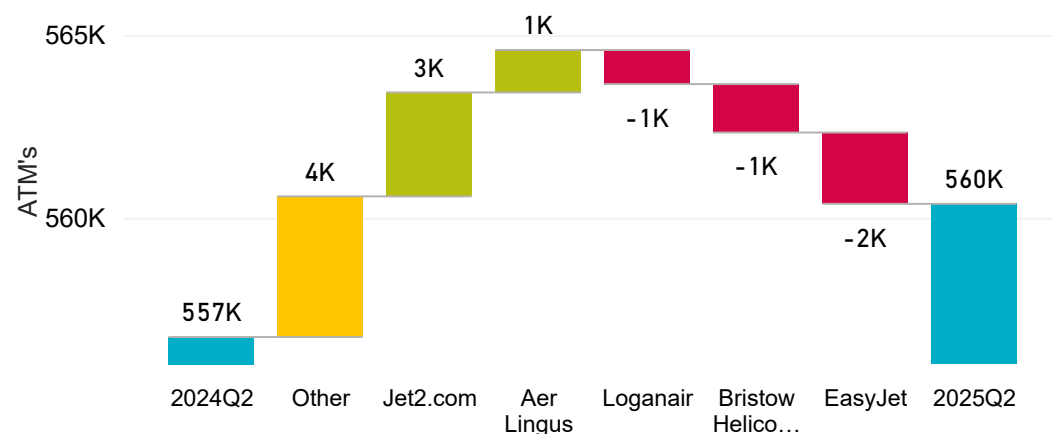
ATM's by scheduled & charter operation

2024Q2: 557K
Scheduled: 5K
Charter: -2K
2025Q2: 560K

ATM's by reporting airport

2024Q2: 557K
Other: 2K
Birmingham: 2K
Manchester: 1K
Southend: 1K
Belfast Int'l: -1K
Aberdeen: -1K
2025Q2: 560K

ATM's by market

2024Q2: 557K
W. Europe: 9K
RoW: 4K
E. Europe: 1K
Other: 0K
N. America: 0K
Domestic: -10K
2025Q2: 560K
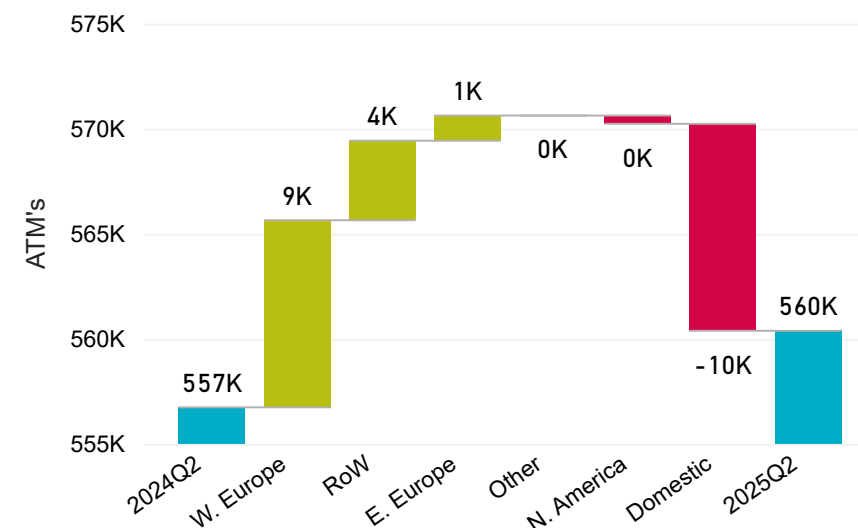
The number of ATMs in Q2 was 560K up from 557K in the same period last year.

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".
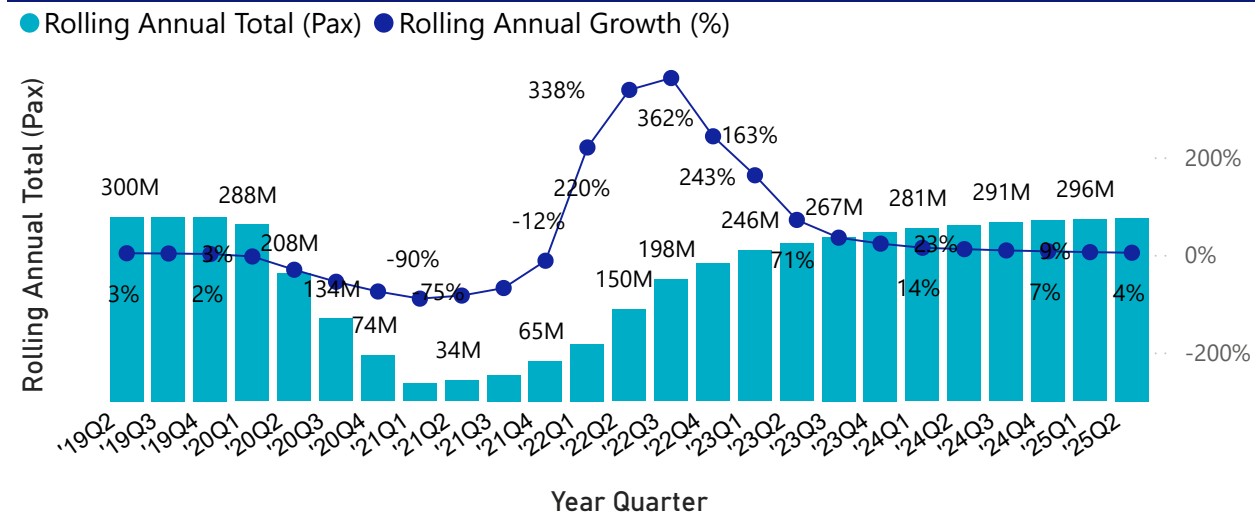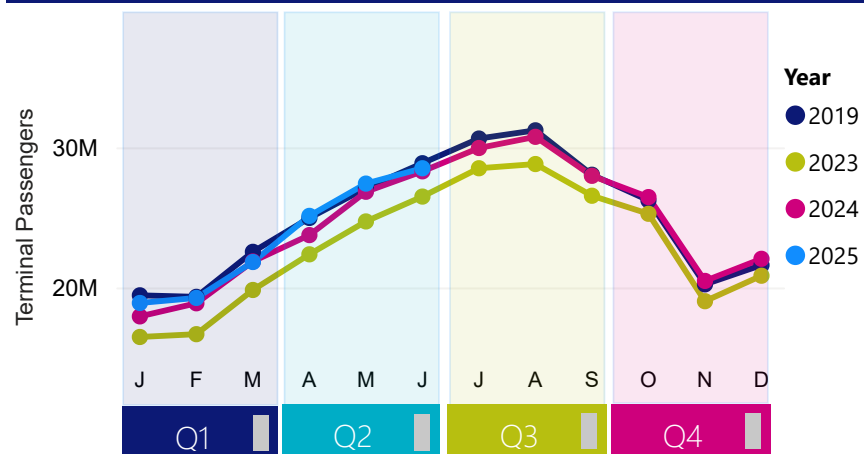
5

Air Transport Movements (ATM's)

5 Year Trend

Cargo Tonnage - Q2 2025

Year-on-year comparison

Cargo tonnage by airline
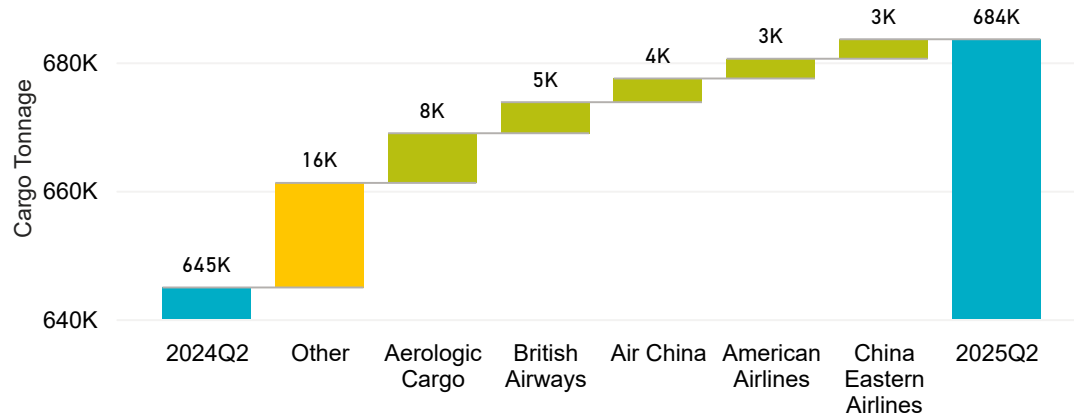
Cargo tonnage by passenger & freighter services
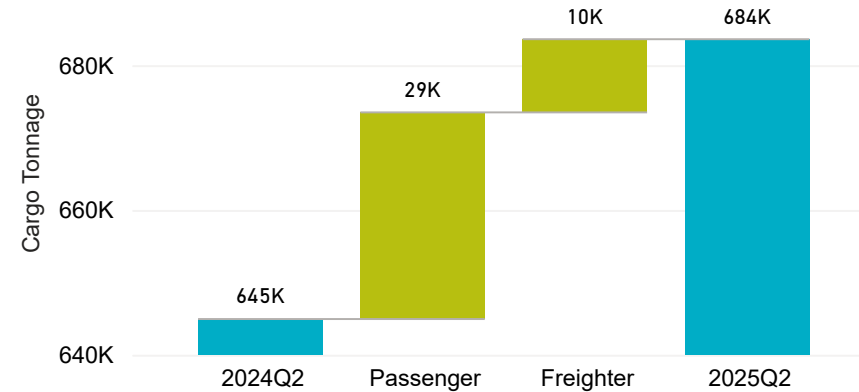
Cargo tonnage by reporting airport
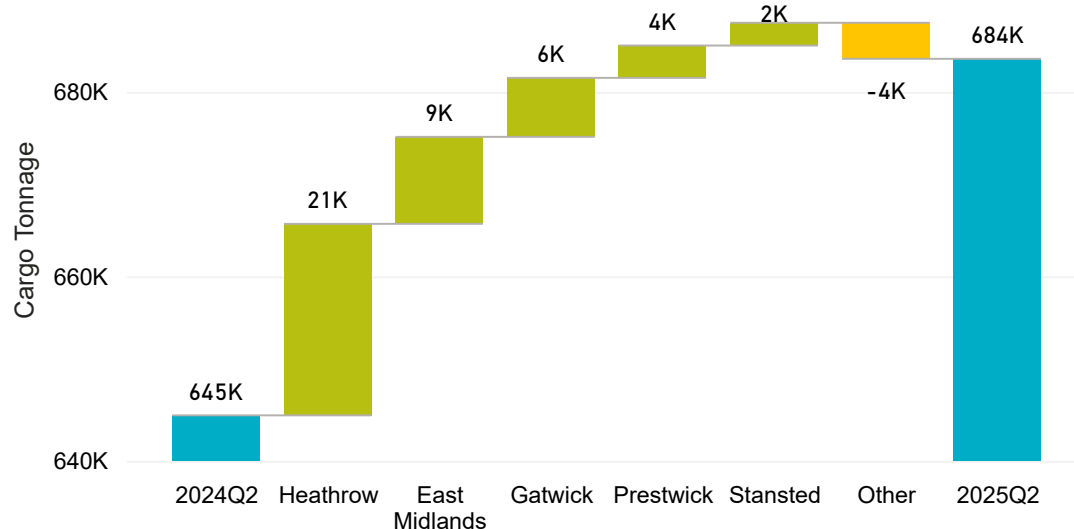
Cargo tonnage by market
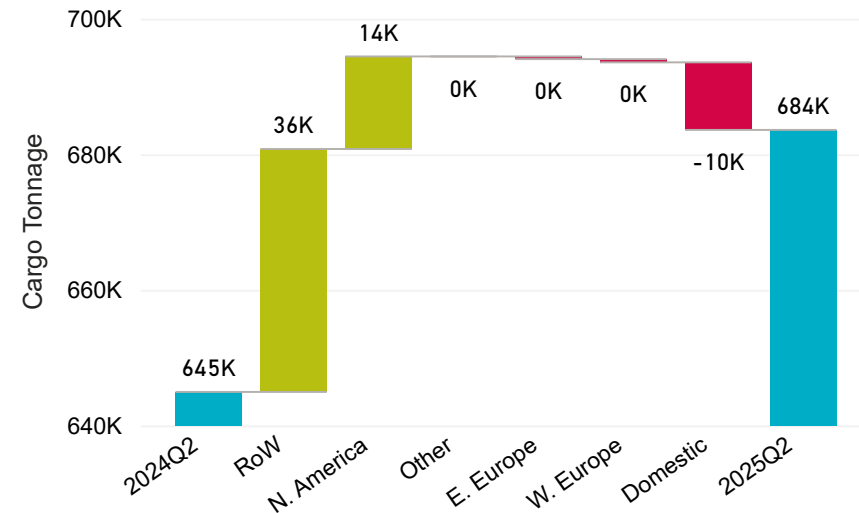
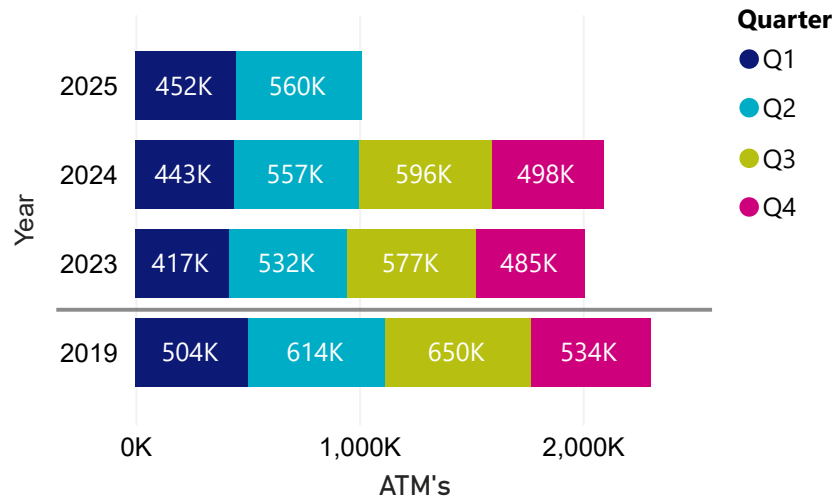Cargo Tonnage in Q2 was 684K up from 645K in the same period last year.

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".
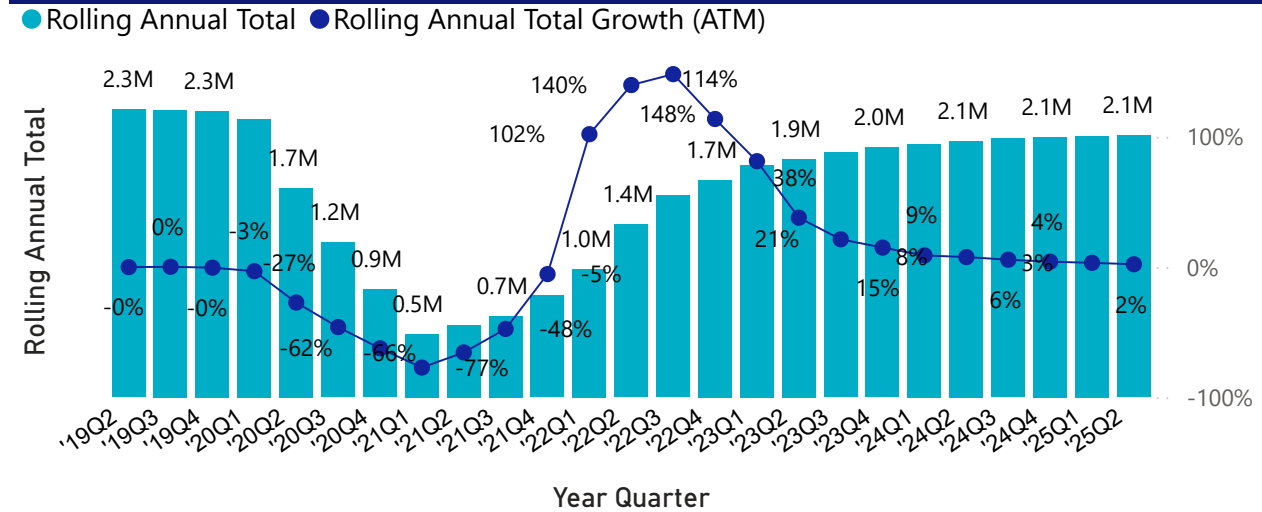
Cargo Tonnage
5 Year Trend

Quarterly
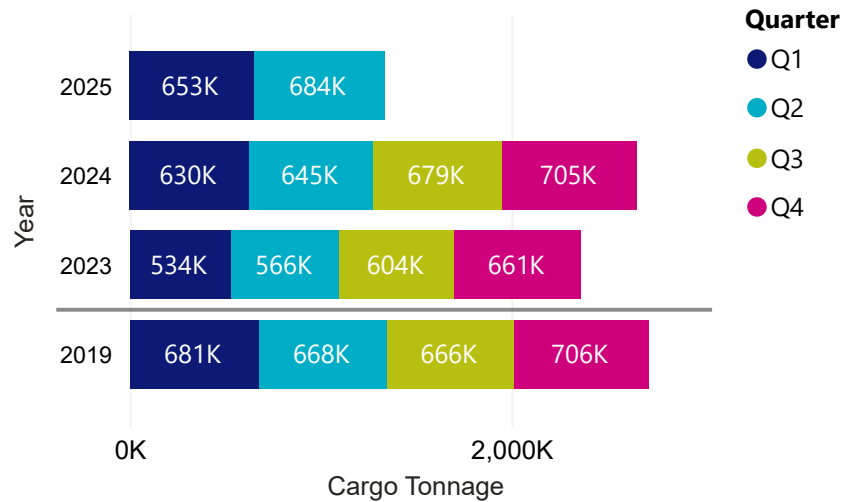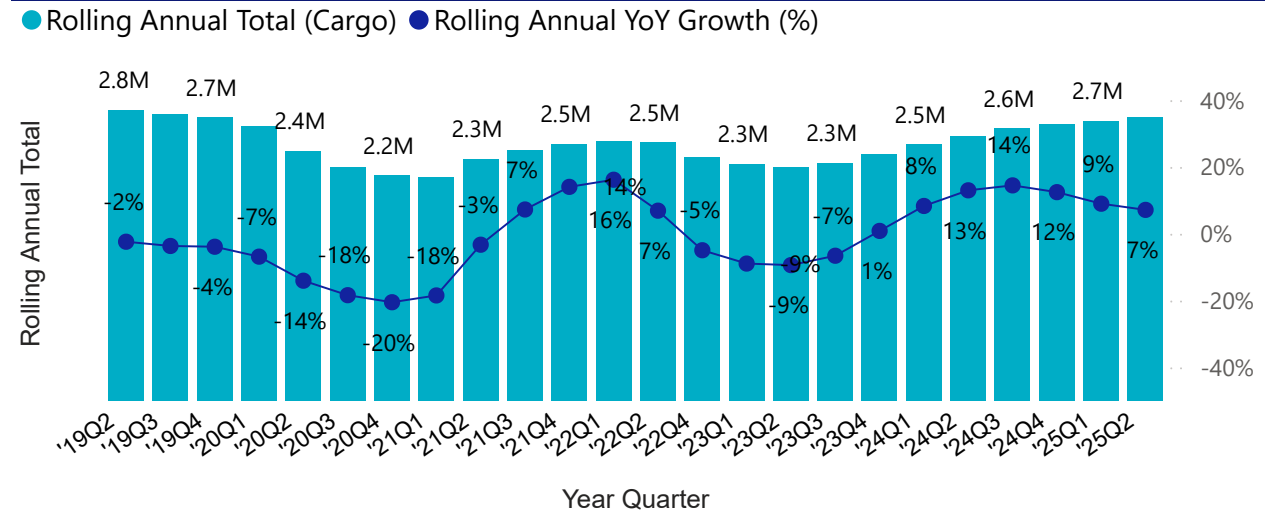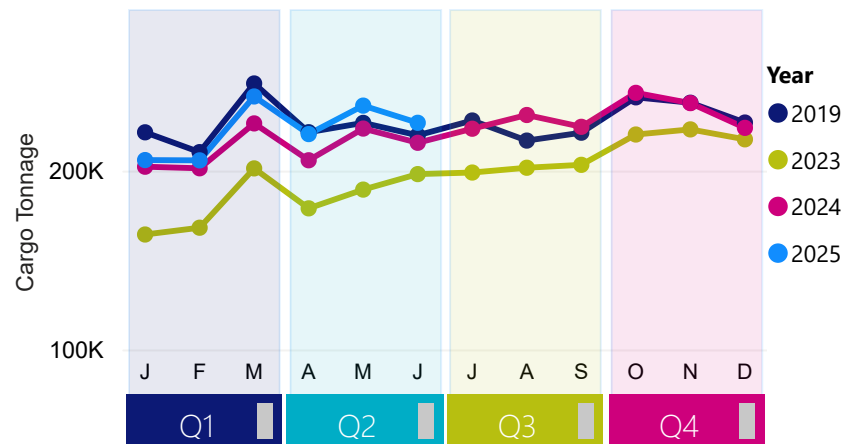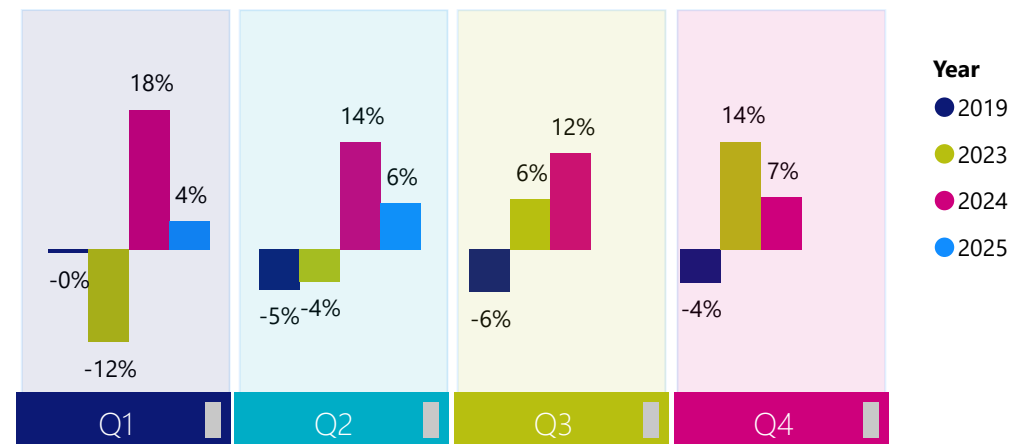
Quarter
- Q1
- Q2
- Q3
- Q4

Year	Q1	Q2	Q3	Q4
2025	653K	684K		
2024	630K	645K	679K	705K
2023	534K	566K	604K	661K
2019	681K	668K	666K	706K

Rolling 12-month total

● Rolling Annual Total (Cargo)   ● Rolling Annual YoY Growth (%)

Monthly

Year
- 2019
- 2023
- 2024
- 2025

Year-on-year % Variance
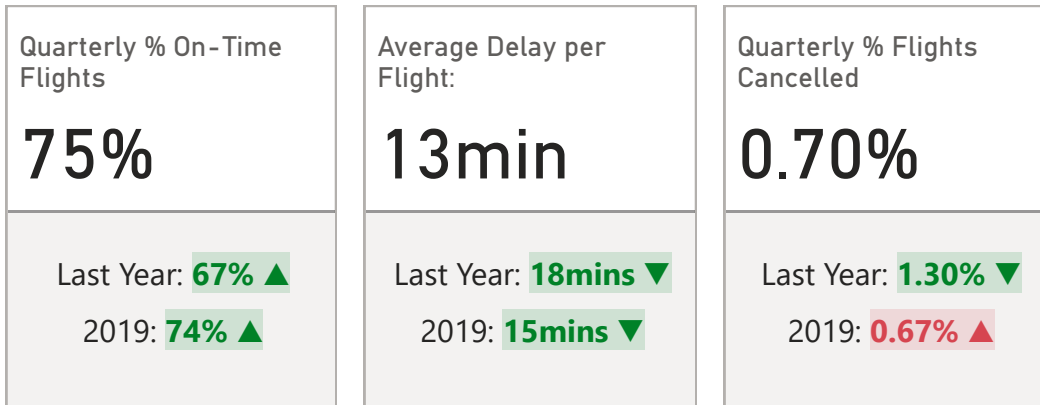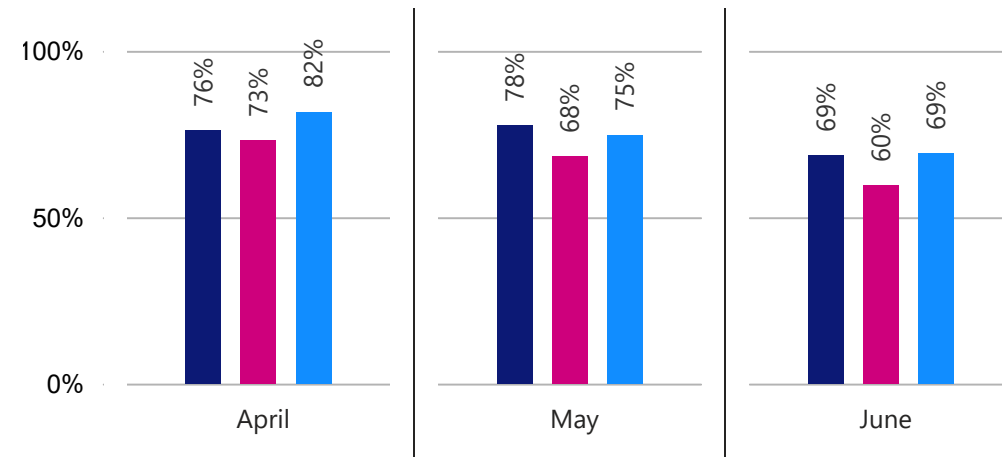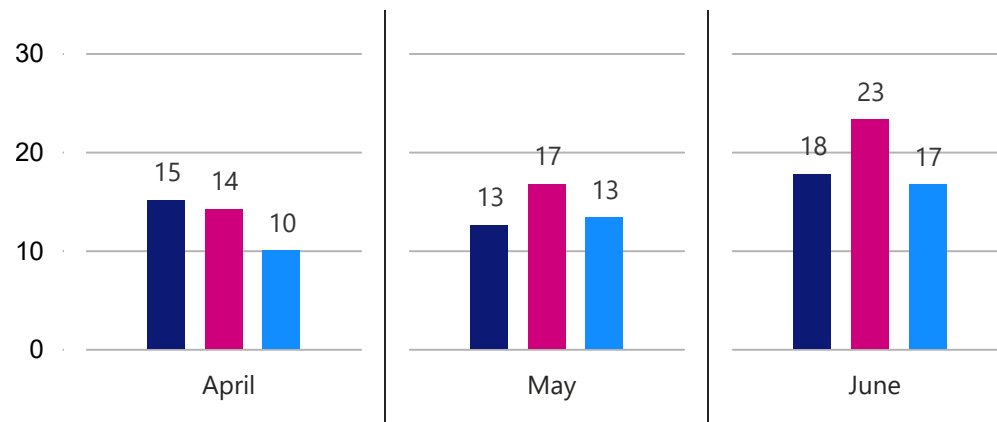
Year
- 2019
- 2023
- 2024
- 2025
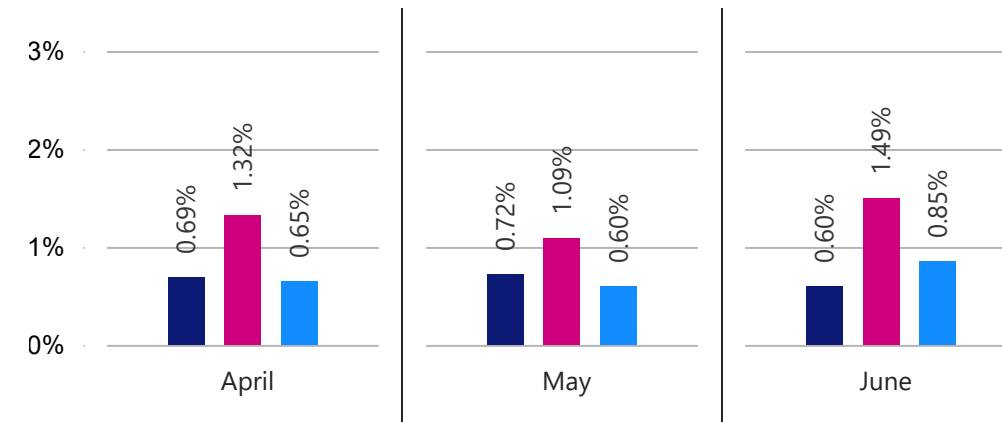
Flight Punctuality - Q2 2025 (UK Arrivals & Departures)

CAA (UK) reporting airports

Percentage of flights on time (<15mins)

Airport	OTP
Aberdeen	86%
Liverpool	82%
Belfast Int'l	82%
Isle Of Man	81%
Belfast City	81%
Heathrow	80%
Glasgow	79%
Southend	79%
London City	78%
Teesside	77%
East Midlands	76%
Cardiff	76%
Southampton	76%
Leeds Bradford	75%
Newcastle	75%
Luton	75%
Edinburgh	74%
Exeter	74%
Gatwick	73%
Bristol	71%
Stansted	71%
Jersey	71%
Bournemouth	69%
Manchester	69%
Birmingham	67%

OTP by Airport

Qtr Average

Distribution of delayed flights

Delay Band (mins)
- 16 to 30mins
- 31 to 60mins
- 61 to 120mins
- 121 to 180mins
- 181 to 360mins
- >360mins
- Cancelled

Percentage in Punctuality Band

10

Flight Punctuality - Q2 2025 (UK Arrivals & Departures)

Top 20 largest airlines by ATM's

Percentage of flights on time (<15mins)

Airline	OTP
Loganair	86%
Virgin Atlantic	84%
Eurowings	80%
British Airways	80%
Vueling	79%
Wizz Air	79%
Lufthansa	79%
Aer Lingus	78%
United Airlines	78%
Air France	78%
Emerald Airlines	77%
Emirates	77%
American Airlines	77%
EasyJet	75%
KLM	75%
Ryanair	71%
Jet2.com	69%
Swiss Airlines	63%
Tui Airways	60%
Blue Islands	55%

Qtr Average

OTP by Airline

Distribution of delayed flights

Delay Band (mins)
- >360mins
- 16 to 30mins
- 31 and 60mins
- 61 and 120mins
- 121 to 180 mins
- 181 to 360mins
- Cancelled

Percentage in Punctuality Band

11

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)

● Terminal Passengers ● ATM's ● Cargo Tonnage

ATM's (millions)

2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
2.2M	2.3M	2.3M	2.3M	2.3M	0.9M	0.8M	1.7M	2.0M	2.1M	1.0M
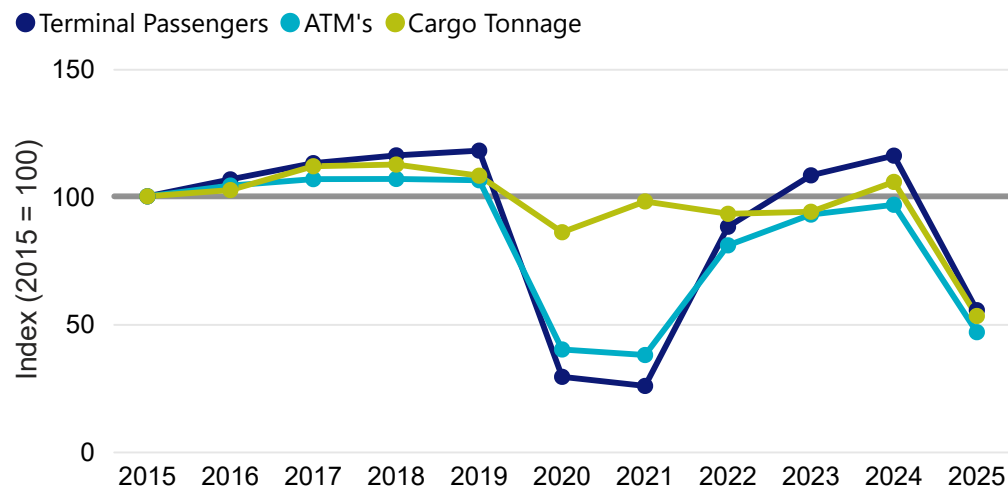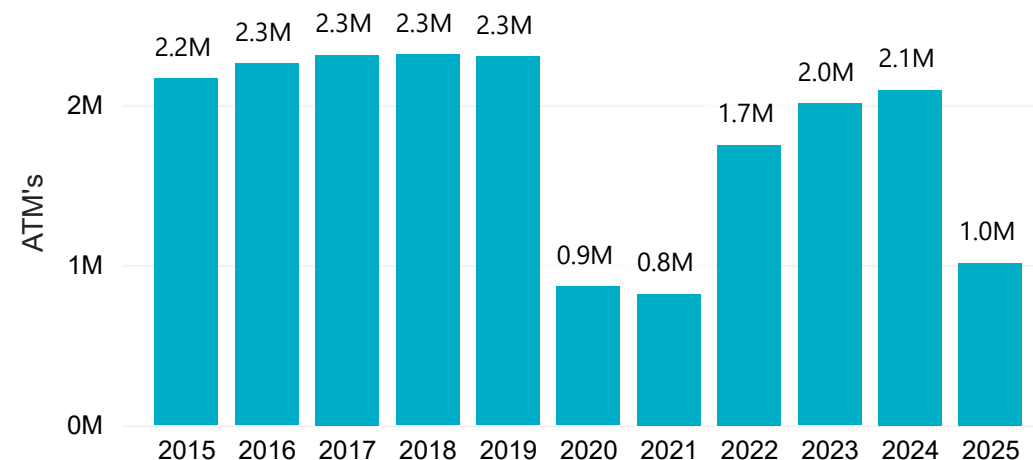
Terminal passengers (millions)

2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
255M	271M	288M	295M	300M	74M	65M	224M	276M	295M	141M

Cargo tonnage (millions)

2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
2.5M	2.6M	2.8M	2.8M	2.7M	2.2M	2.5M	2.3M	2.4M	2.7M	1.3M
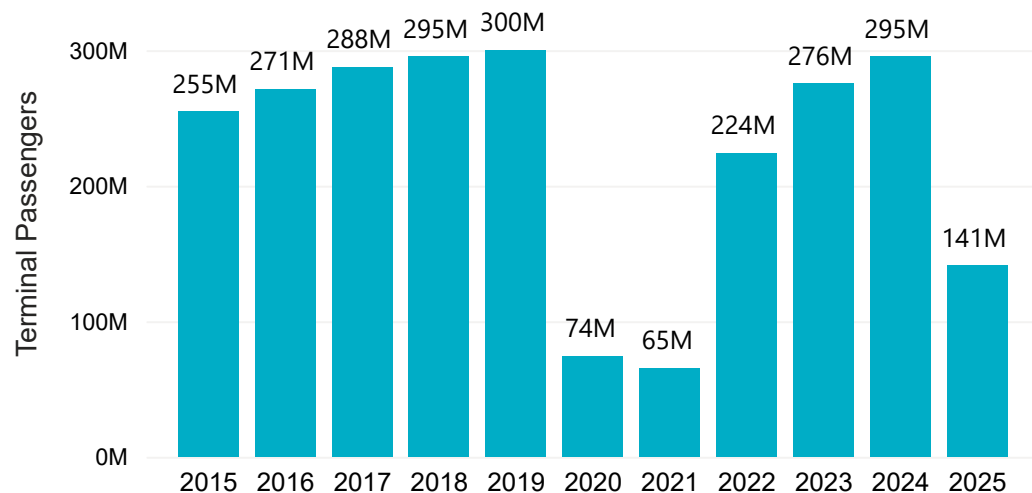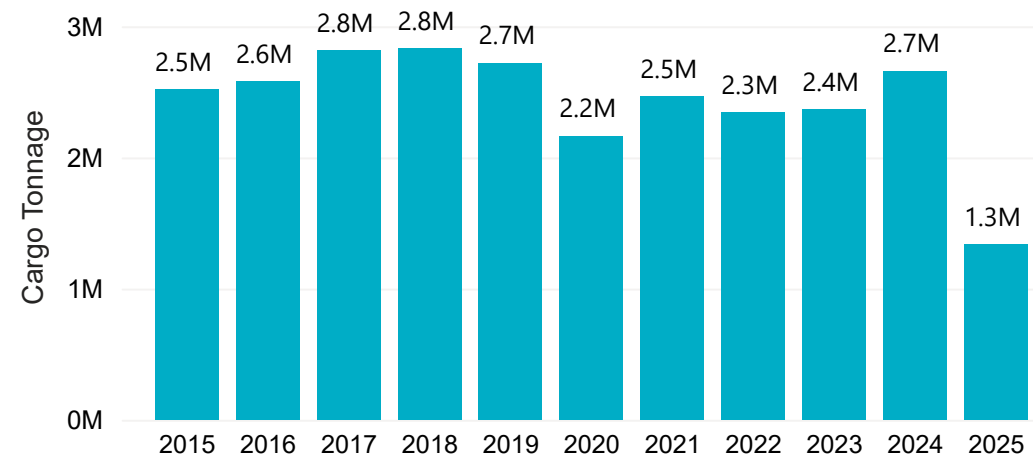
10 Year trends

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)
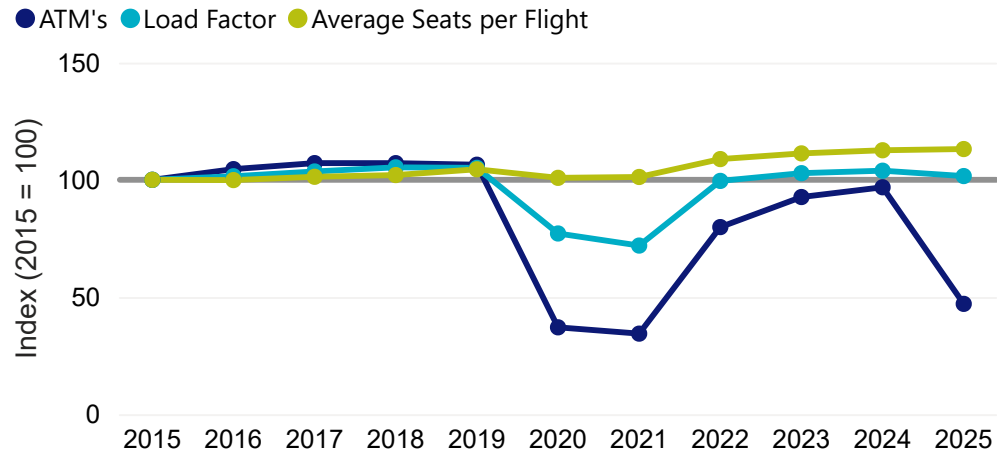
● ATM's ● Load Factor ● Average Seats per Flight
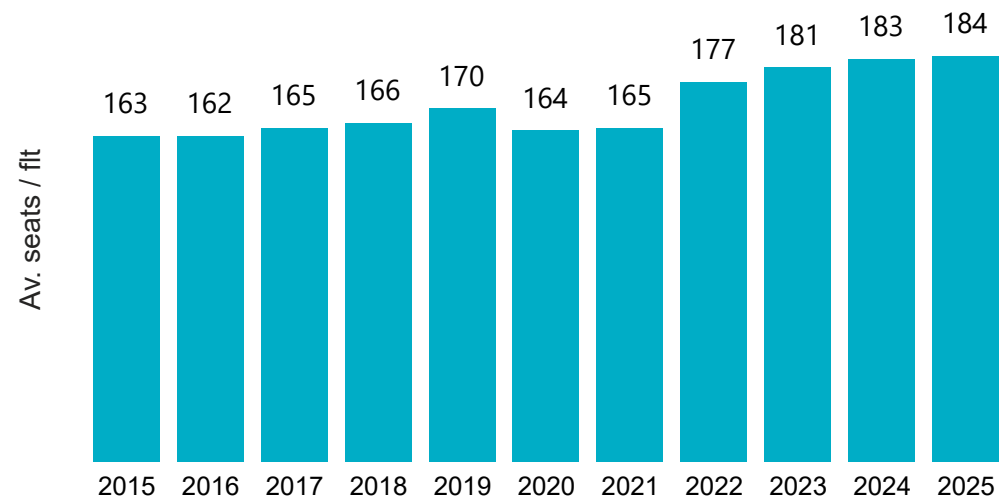
Average load factor (%)
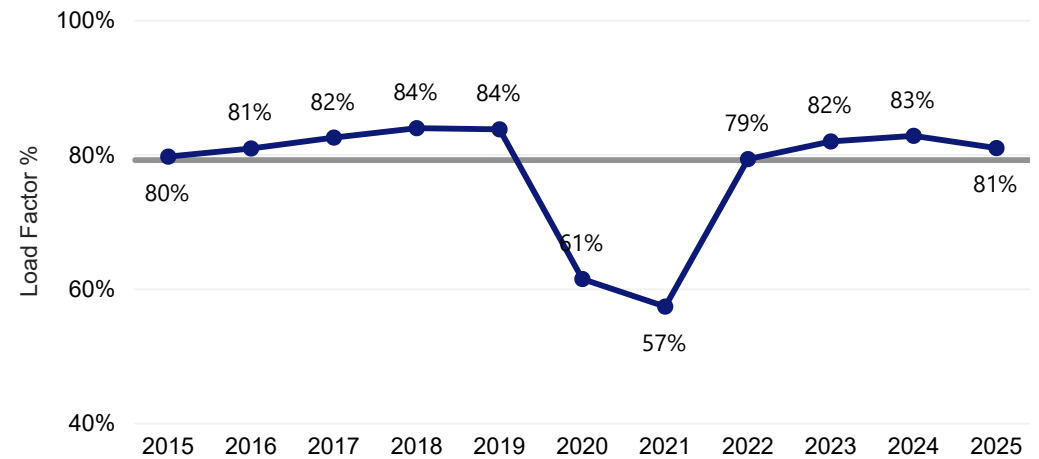
NB: Load Factor (%) represents the proportion of seats on a flight used on a flight i.e. Terminal Passengers / Total Seats.

Average seats per flight

Year	Av. seats / flt
2015	163
2016	162
2017	165
2018	166
2019	170
2020	164
2021	165
2022	177
2023	181
2024	183
2025	184

10 Year trends

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

% On-time performance (OTP) <15mins

% On Time

77%, 75%, 75%, 72%, 75%, 83%, 83%, 62%, 64%, 67%, 76%

2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025
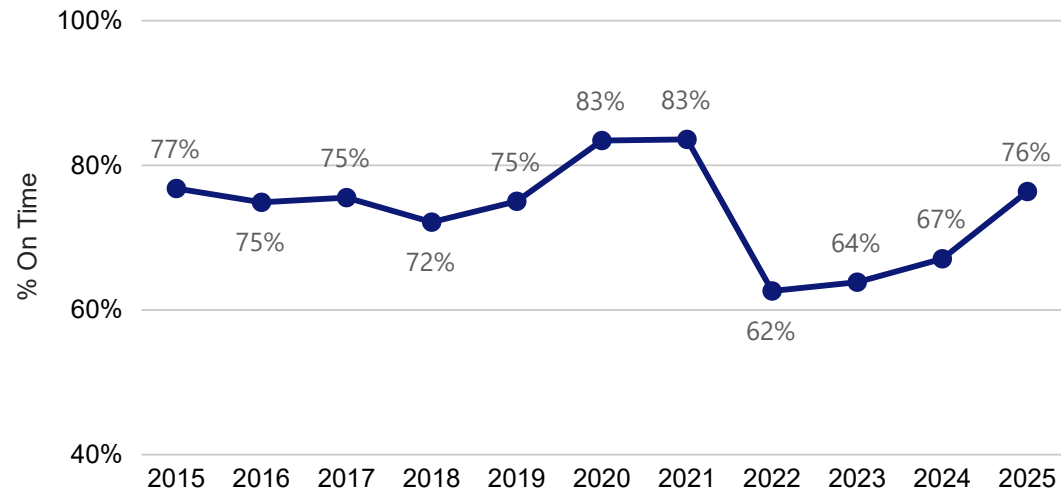
% OTP by month (last five years)

Year
- 2019
- 2023
- 2024
- 2025

J F M A M J J A S O N D

Q1 Q2 Q3 Q4
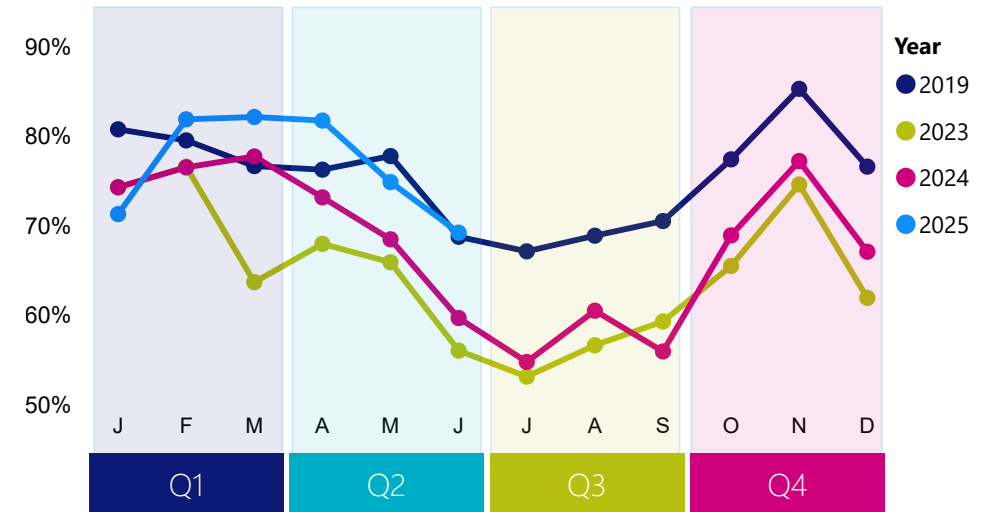
Average delay minutes per flight

Average Delay (Mins)

13, 15, 14, 18, 15, 10, 9, 22, 21, 19, 13

2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025
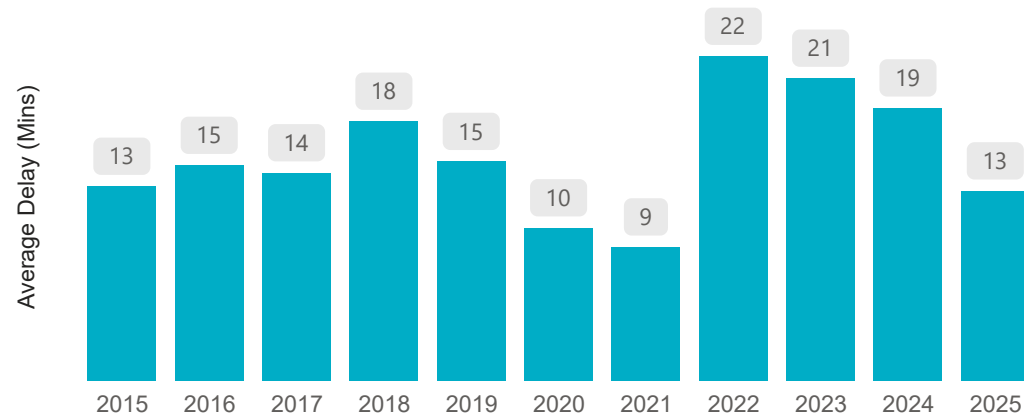
% of flights cancelled (within 24hr before departure)

% of Flights Cancelled

0.3%, 0.6%, 1.5%, 0.9%, 3.7%, 1.2%, 1.6%, 1.8%, 1.4%, 1.1%

2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025

14
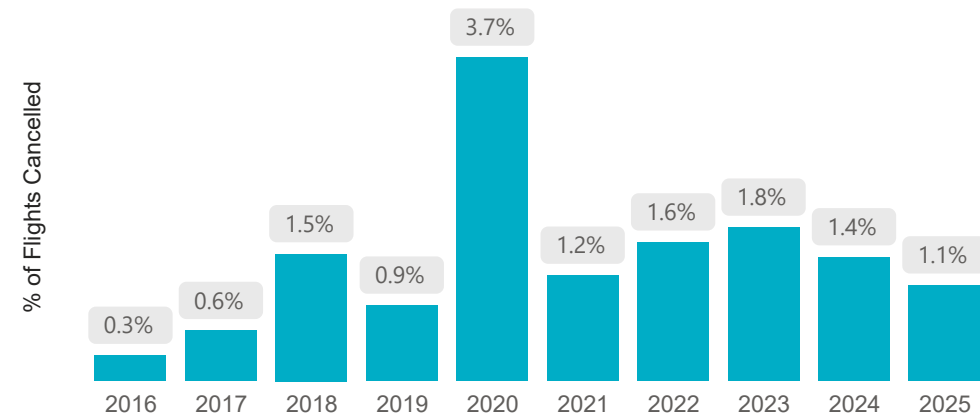
Trend since 1990 (30+ years)

Terminal Passengers and % On-Time Performance

Annual UK Terminal Passengers (1990 - 2024)
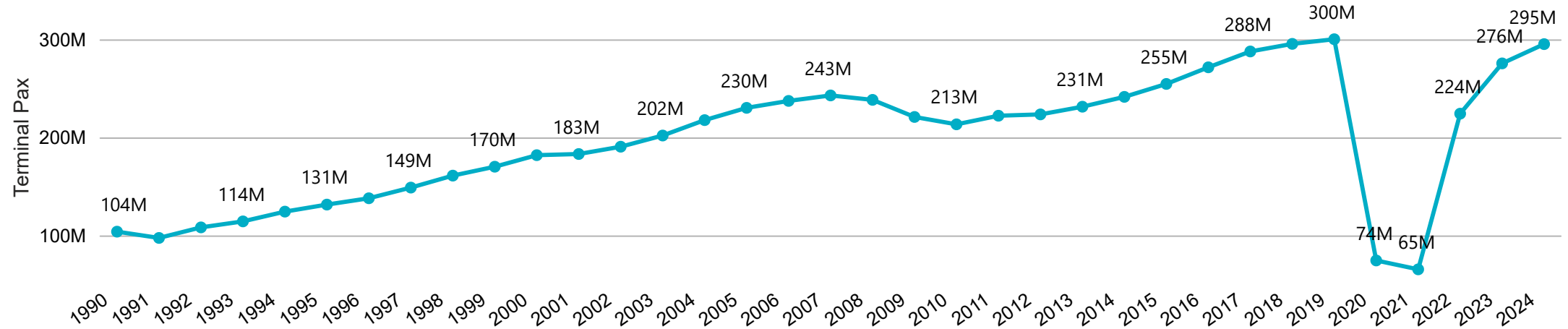
On-Time Performance (within 15mins of schedule)
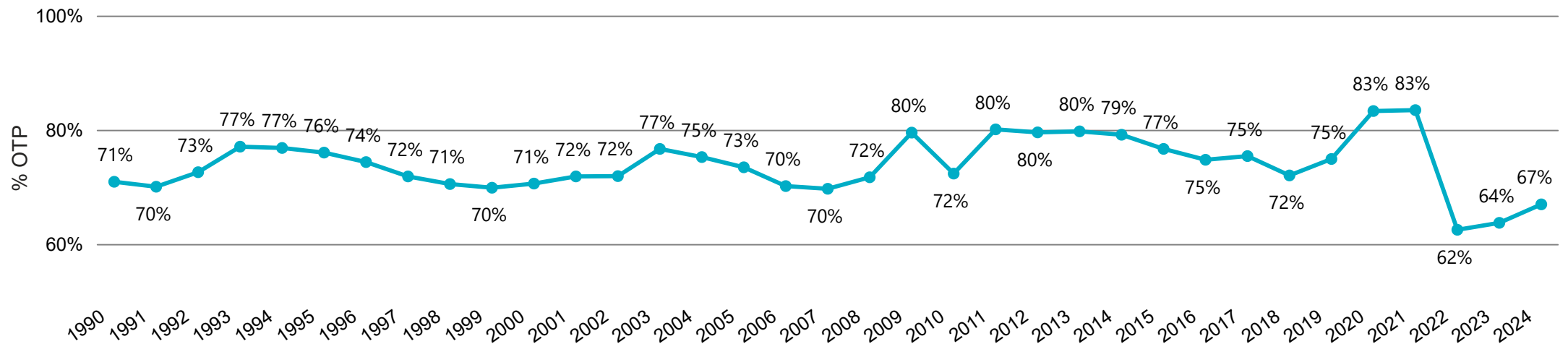
Trends since 1990 (30+ years)

Cargo Tonnage

Annual UK Cargo Tonnage (1990 - 2024)
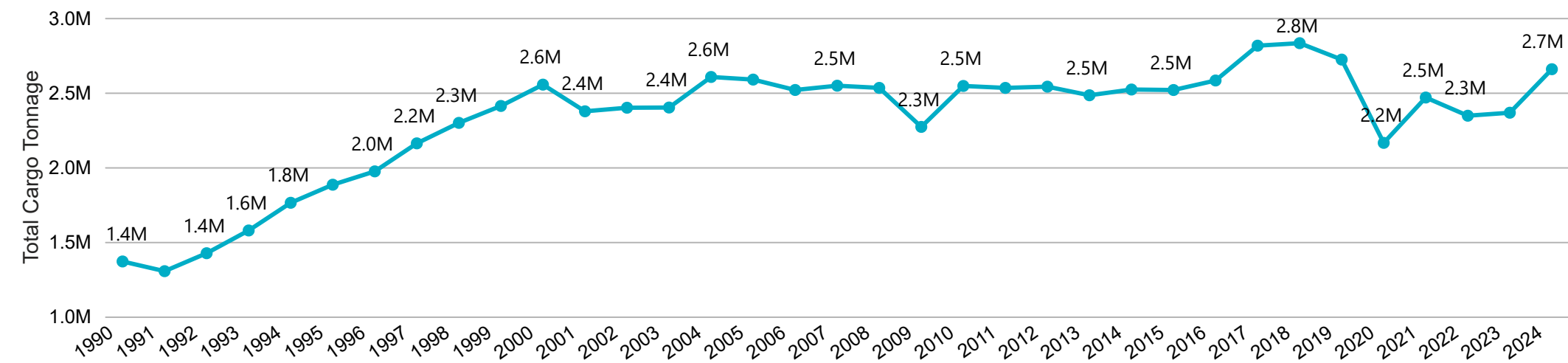
Data Tables (Latest Quarter): *Terminal Passengers - Q2 2025*

Top 25 UK reporting airports

Reporting Airport	Term. Passengers	% YoY	
Heathrow	21,661,948	2%	▲
Gatwick	11,567,197	-0%	▼
Manchester	8,566,810	5%	▲
Stansted	7,972,427	-0%	▼
Luton	4,784,626	4%	▲
Edinburgh	4,612,546	6%	▲
Birmingham	3,715,766	8%	▲
Bristol	3,016,720	-0%	▼
Glasgow	2,273,871	0%	▲
Belfast Int'l	1,792,211	-2%	▼
Liverpool	1,580,140	9%	▲
Newcastle	1,532,375	7%	▲
Leeds Bradford	1,314,715	8%	▲
East Midlands	1,259,288	-1%	▼
London City	990,642	6%	▲
Aberdeen	605,708	0%	▲
Belfast City	597,123	-3%	▼
Bournemouth	423,257	27%	▲
Jersey	396,087	-2%	▼
Cardiff	273,609	10%	▲
Inverness	245,339	4%	▲
Southampton	242,670	9%	▲
Southend	242,318	199%	▲
Prestwick	209,445	23%	▲
Guernsey	187,340	2%	▲
Total	80,064,178	3%	▲

Top 25 Airlines

| Airline (groups)	Term. Passengers	% YoY	
EasyJet	16,130,403	1%	▲
Ryanair	15,661,393	4%	▲
British Airways	13,553,793	2%	▲
Jet2.com	6,182,083	6%	▲
Tui Airways	3,441,587	-0%	▼
Wizz Air	2,961,176	1%	▲
Virgin Atlantic	1,537,128	4%	▲
Emirates	1,359,675	4%	▲
Aer Lingus	1,234,165	7%	▲
KLM	1,209,591	4%	▲
American Airlines	1,009,136	-4%	▼
Vueling	985,002	4%	▲
Lufthansa	882,108	-8%	▼
Qatar Airways	814,424	3%	▲
Loganair	714,816	-0%	▼
United Airlines	675,208	-6%	▼
Turkish Airlines	576,397	3%	▲
Sunexpress	513,982	27%	▲
Air Canada	479,626	3%	▲
Delta Airlines	478,274	4%	▲
SAS	445,177	-4%	▼
Swiss Airlines	412,107	6%	▲
Air India	394,430	24%	▲
Eurowings	393,563	-0%	▼
		6%	▲
Total	72,414,517	3%	▲

Top 25 international destinations

OD Airport Name	Term. Passengers	% YoY	
Dublin	2,588,810	4%	▲
Amsterdam	2,174,396	-1%	▼
Palma De Mallorca	2,146,823	6%	▲
Alicante	1,872,526	7%	▲
Malaga	1,843,477	10%	▲
Faro	1,518,327	6%	▲
Dubai	1,475,697	6%	▲
Tenerife (Surreina Sofia)	1,358,633	1%	▲
Barcelona	1,345,682	-1%	▼
Antalya	1,180,848	3%	▲
Paris (Charles De Gaulle)	1,143,820	6%	▲
New York (Jf Kennedy)	1,082,656	-6%	▼
Doha Hamad	867,870	1%	▲
Dalaman	857,126	-2%	▼
Arrecife	830,306	3%	▲
Madrid	828,222	-3%	▼
Lisbon	821,057	-4%	▼
Istanbul	746,232	0%	▲
Copenhagen	720,264	-1%	▼
Frankfurt Main	720,037	-4%	▼
Ibiza	661,114	3%	▲
Geneva	627,567	1%	▲
Rome (Fiumicino)	627,305	6%	▲
Berlin Brandenburg	610,503	-2%	▼

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Data Tables (Latest Quarter): *ATM's - Q2 2025*

Top 25 UK Reporting Airports

Reporting Airport	ATM's	% YoY	
Heathrow	122,965	1%	▲
Gatwick	70,631	-1%	▼
Manchester	51,984	3%	▲
Stansted	50,202	-0%	▼
Edinburgh	32,706	2%	▲
Luton	28,296	2%	▲
Birmingham	25,359	7%	▲
Bristol	19,784	-1%	▼
Glasgow	18,535	1%	▲
Aberdeen	14,512	-9%	▼
Belfast Int'l	13,037	-9%	▼
London City	12,481	-1%	▼
East Midlands	12,110	-4%	▼
Newcastle	10,667	4%	▲
Liverpool	10,650	8%	▲
Leeds Bradford	9,419	7%	▲
Belfast City	7,208	-8%	▼
Guernsey	4,530	-6%	▼
Jersey	4,409	-10%	▼
Southampton	4,224	-6%	▼
Norwich	3,841	12%	▲
Sumburgh	3,586	4%	▲
Bournemouth	2,883	35%	▲
Inverness	2,667	-12%	▼
Kirkwall	2,658	4%	▲
Total	**539,344**	**0%**	▲

Top 25 international destinations

OD Airport Name	ATM's	% YoY	
Dublin	21,546	4%	▲
Amsterdam	19,329	-3%	▼
Palma De Mallorca	13,286	8%	▲
Malaga	11,064	12%	▲
Alicante	11,010	9%	▲
Paris (Charles De Gaulle)	9,550	-1%	▼
Faro	9,395	7%	▲
Barcelona	8,606	-0%	▼
Tenerife (Surreina Sofia)	7,817	5%	▲
Antalya	6,863	5%	▲
Frankfurt Main	6,287	-6%	▼
Dalaman	5,267	2%	▲
New York (Jf Kennedy)	5,110	-9%	▼
Arrecife	5,067	9%	▲
Lisbon	5,033	-5%	▼
Madrid	5,030	2%	▲
Copenhagen	5,010	-6%	▼
Geneva	4,614	-2%	▼
Istanbul	4,339	1%	▲
Ibiza	4,329	3%	▲
Berlin Brandenburg	4,154	-4%	▼
Rome (Fiumicino)	4,089	3%	▲
Dubai	4,055	3%	▲
Budapest	3,584	8%	▲
Doha Hamad	3,417	6%	▲

ATM's by operation type

Op. Type	ATM's	% YoY	
Scheduled	528,962	1%	▲
Charter	31,413	-6%	▼

ATM's by market

Market	ATM's	% YoY	
W. Europe	333,387	3%	▲
Domestic	111,106	-8%	▼
RoW	43,430	10%	▲
E. Europe	38,717	3%	▲
N. America	33,741	-1%	▼

Data Tables (Latest Quarter): *Cargo Tonnage - Q2 2025*

Cargo Tonnage by UK reporting airport

Reporting Airport	Cargo Tonnage	% YoY	
Heathrow	391,542	6%	▲
East Midlands	95,603	11%	▲
Stansted	80,574	3%	▲
Gatwick	33,494	24%	▲
Manchester	22,669	3%	▲
Birmingham	16,951	0%	▲
Belfast Int'l	7,595	-23%	▼
Luton	7,505	-6%	▼
Bournemouth	7,246	39%	▲
Edinburgh	6,714	-24%	▼
Prestwick	6,101	135%	▲
Glasgow	2,666	44%	▲
Aberdeen	1,457	-33%	▼
Newcastle	1,020	-36%	▼
Teesside	442	582%	▲
Guernsey	335	-47%	▼
Cardiff	315	15752600%	▲
Kirkwall	310	28%	▲
Sumburgh	283	-2%	▼
Stornoway	231	-8%	▼
Benbecula	170	21%	▲
Jersey	121	-10%	▼
Islay	108	14%	▲
Humberside	32	143%	▲
Inverness	23	-98%	▼
Total	**683,510**	**6%**	

Top 25 international destinations

OD Airport Name	Cargo Tonnage	% YoY	
Dubai	37,391	14%	▲
New York (Jf Kennedy)	33,206	-4%	▼
Doha Hamad	32,680	13%	▲
Leipzig	29,698	-4%	▼
Los Angeles International	21,982	1%	▲
Shanghai (Pu Dong)	16,676	10%	▲
Chicago (O'Hare)	15,649	4%	▲
Mumbai	14,713	41%	▲
Delhi	14,635	61%	▲
Cologne Bonn	14,145	4%	▲
Hong Kong (Chek Lap Kok)	14,118	12%	▲
Guangzhou Baiyun International	13,928	21%	▲
Istanbul	13,899	-3%	▼
Beijing	13,012	43%	▲
Singapore	12,801	16%	▲
Miami International	11,237	12%	▲
Toronto	10,656	6%	▲
Abu Dhabi International	10,543	-1%	▼
Brussels	10,164	14%	▲
Cincinnati	9,882	-5%	▼
Paris (Charles De Gaulle)	9,492	-7%	▼
Memphis	9,212	10%	▲
Tokyo (Haneda)	8,603	6%	▲
Philadelphia International	8,511	15%	▲
Dallas/Fort Worth	8,372	10%	▲

Cargo Tonnage by operation type

Op. Type	Cargo Tonnage	% YoY	
Scheduled	646,010	5%	▲
Charter	37,579	19%	▲

Cargo Tonnage by market

Market	Cargo Tonnage	% YoY	
RoW	331,828	12%	▲
N. America	210,694	7%	▲
W. Europe	116,601	-0%	▼
Domestic	23,552	-30%	▼
E. Europe	914	-30%	▼

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