



CAA Aviation Trends Quarter 3 2025

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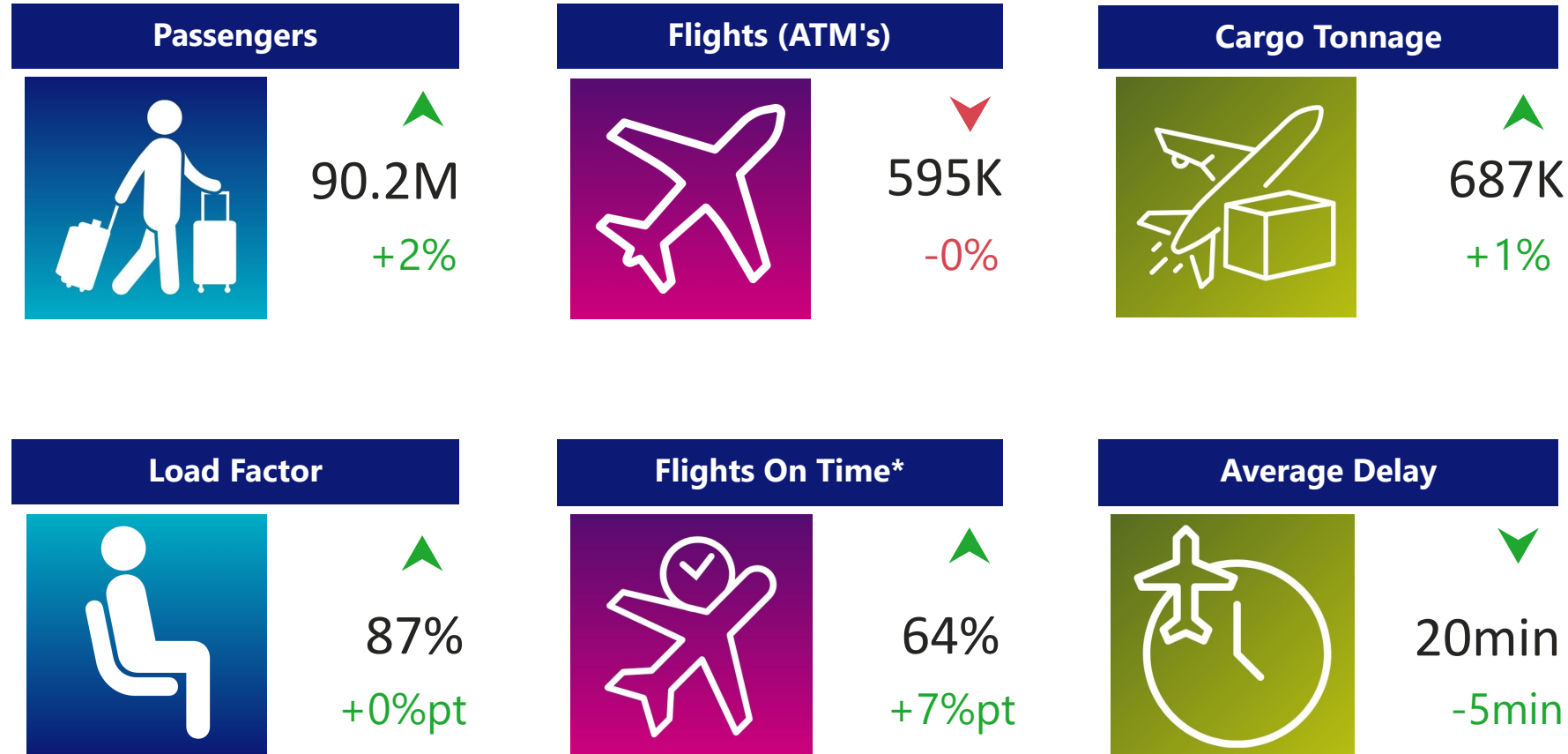
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Report Notes

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)**
 - 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 - Q3 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.

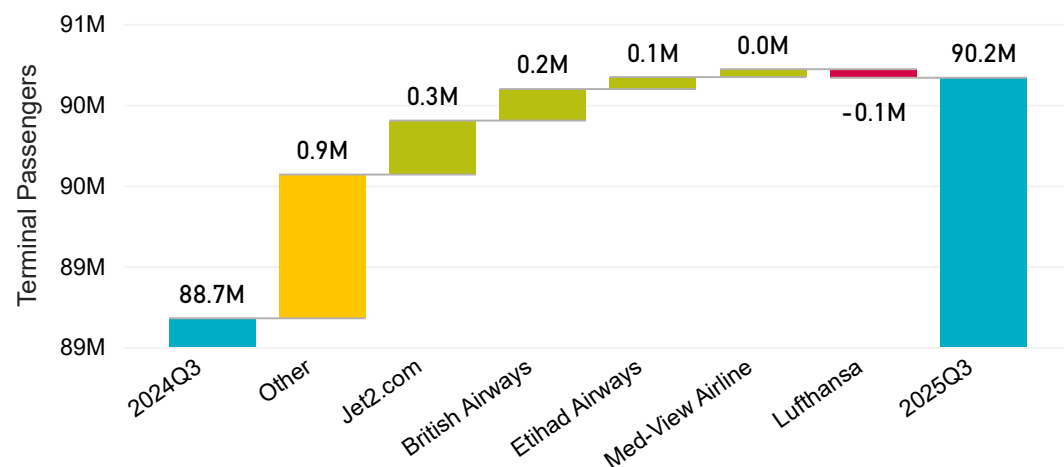
The text in green or red show growth rates relative to the same period last year.

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

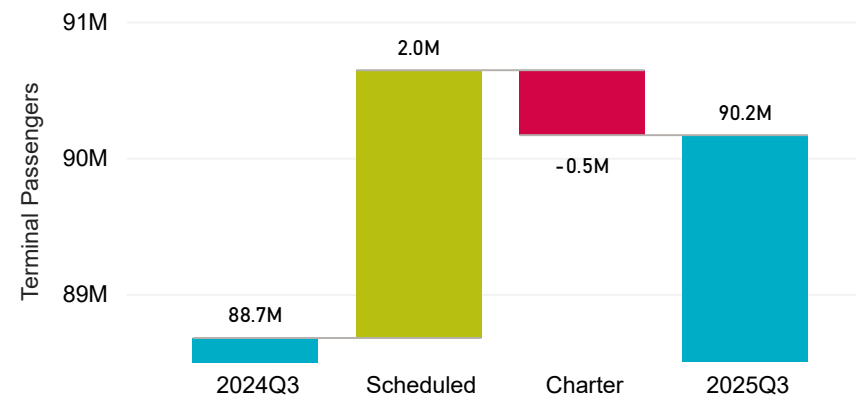
Terminal passengers Q3 2025

Year-on-year comparison

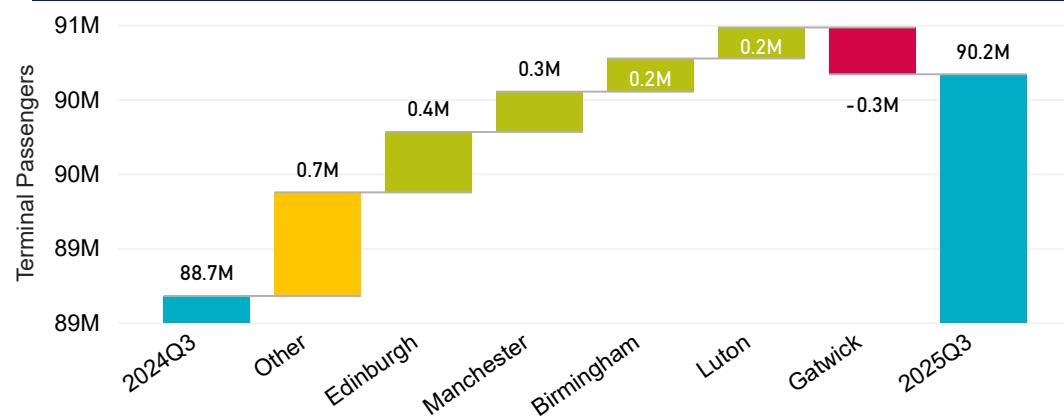
Terminal passengers by airline



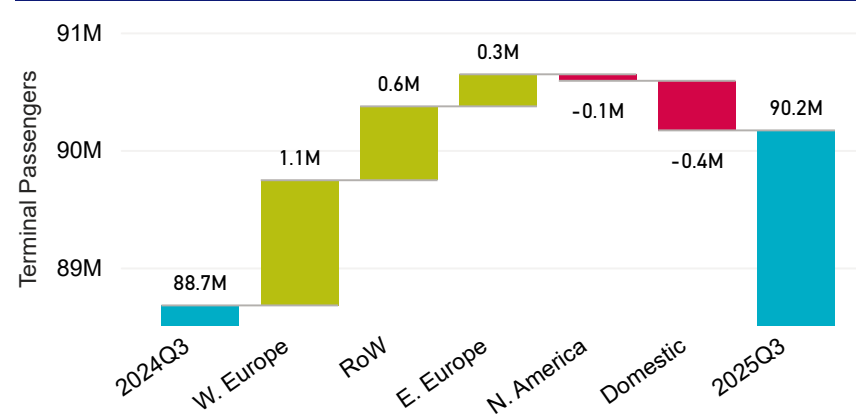
Terminal passengers by scheduled & charter services



Terminal passengers by reporting airport



Terminal passengers by market

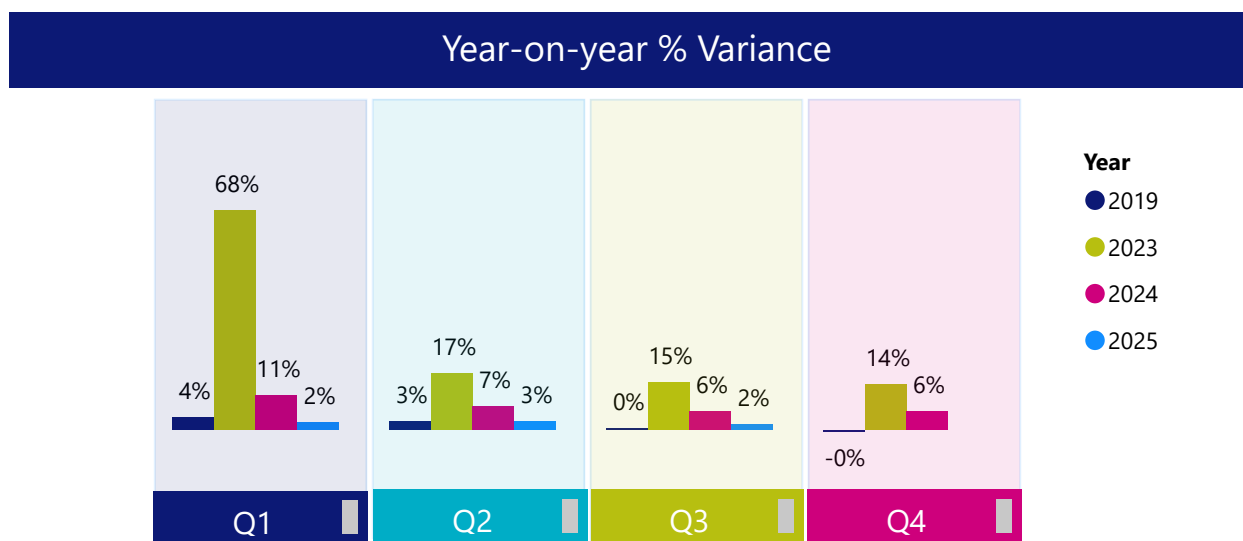
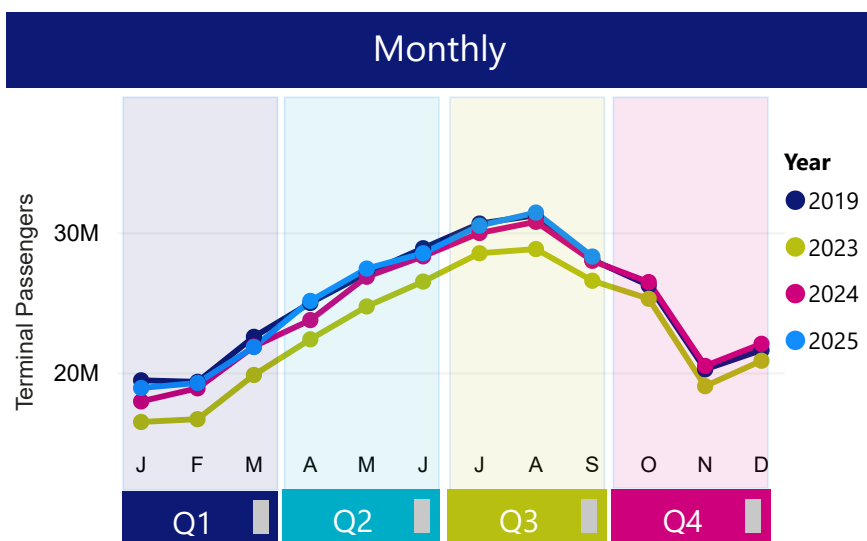
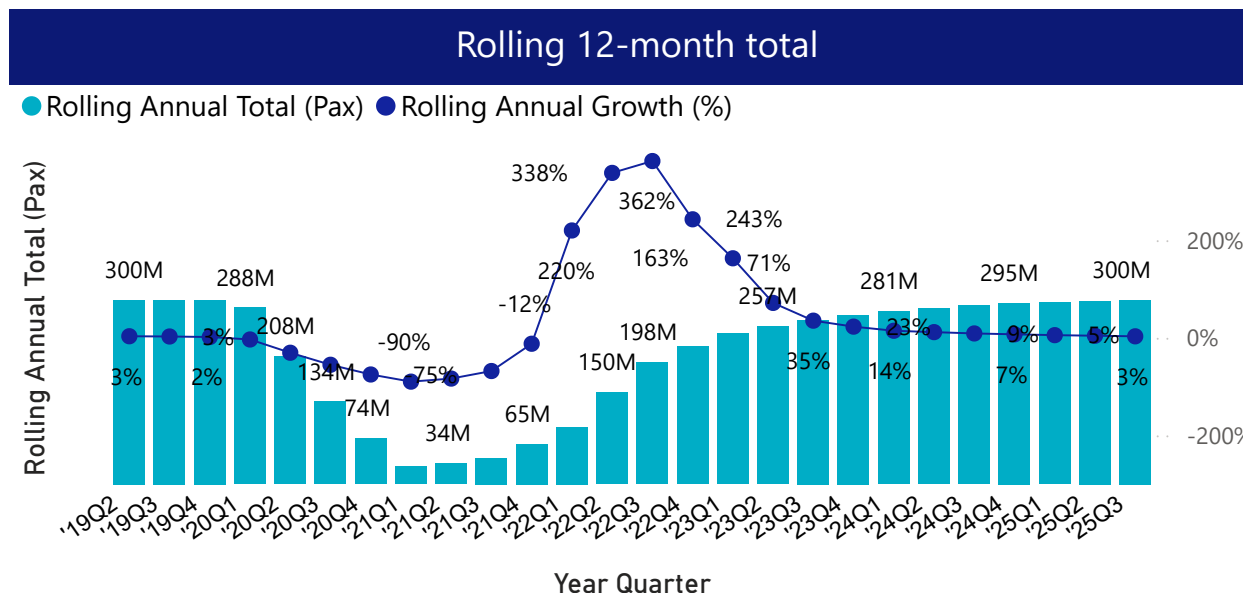
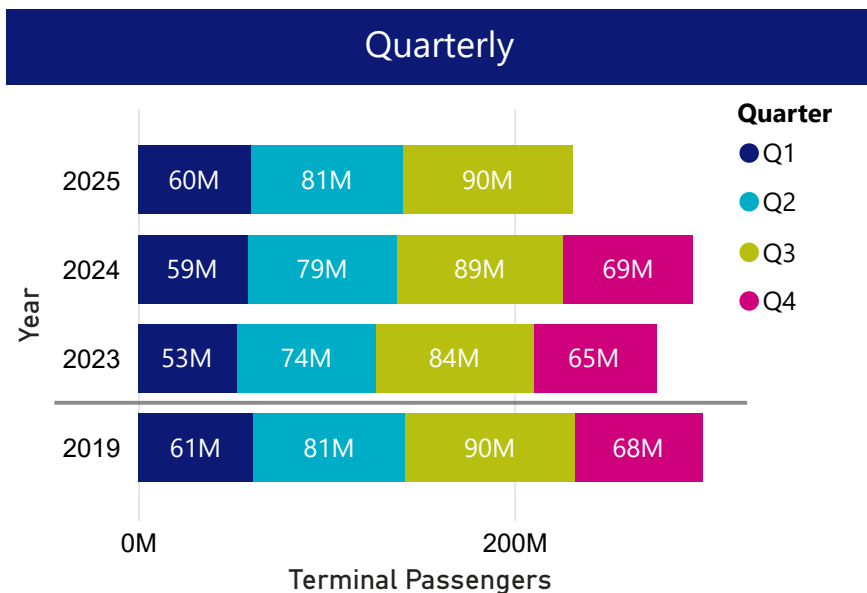


The number of terminal passengers in Q3 was 90.2M up from 88.7M in the same period last year.

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

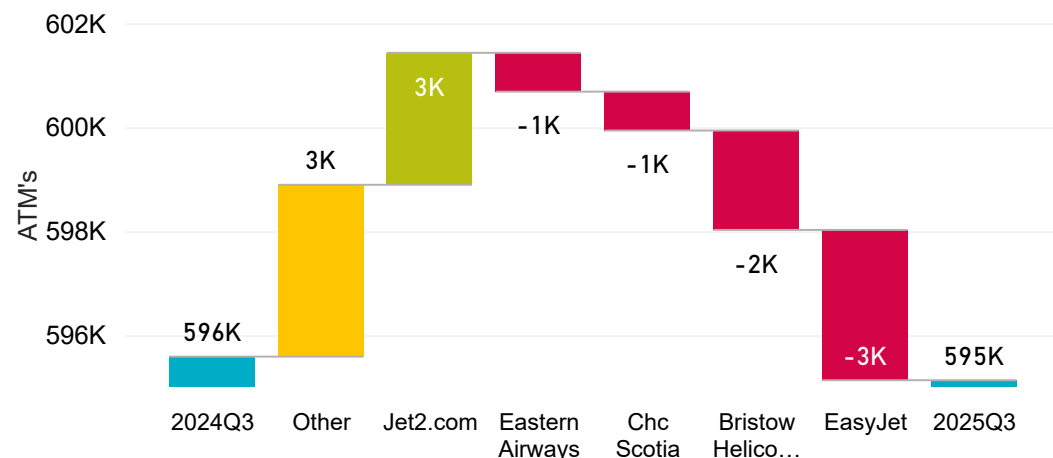
5 Year Trend



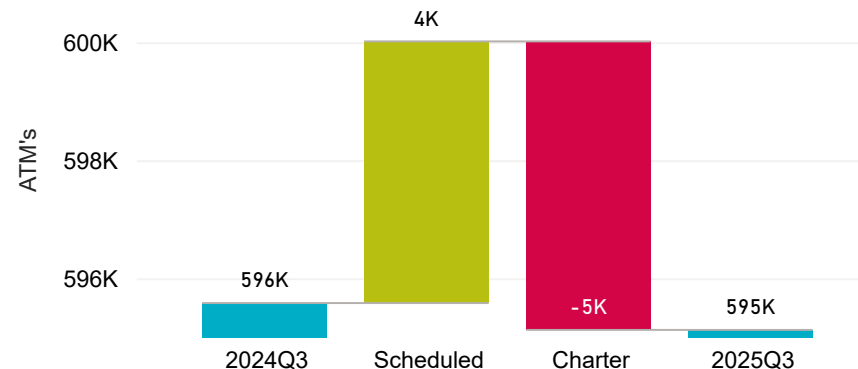
Air Transport Movements (ATM's) - Q3 2025

Year-on-year comparison

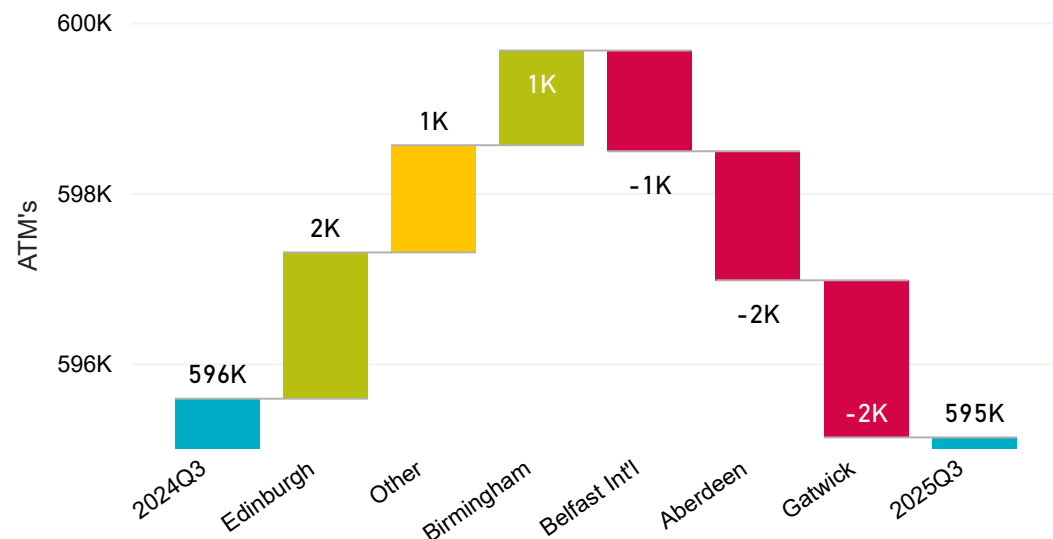
ATM's by airline



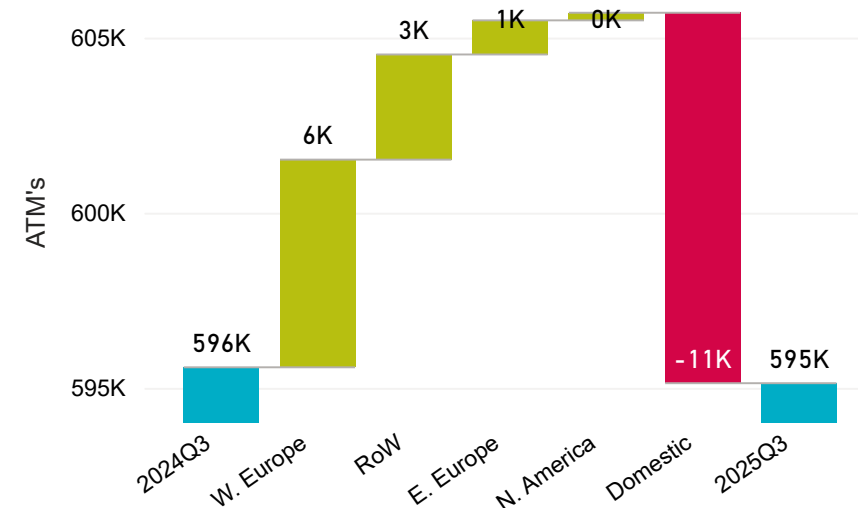
ATM's by scheduled & charter operation



ATM's by reporting airport



ATM's by market

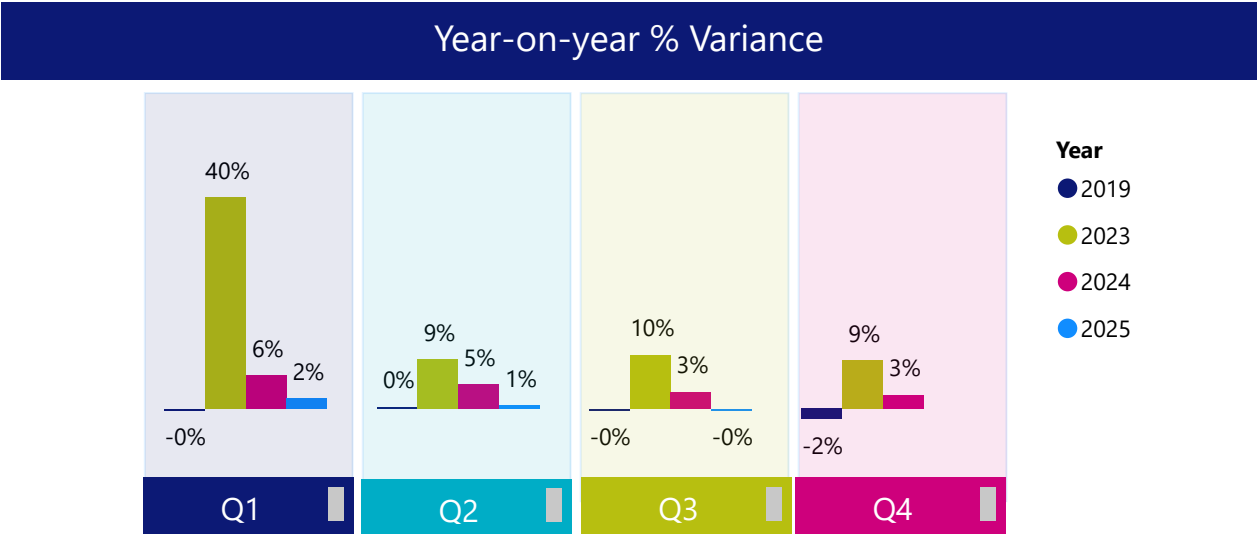
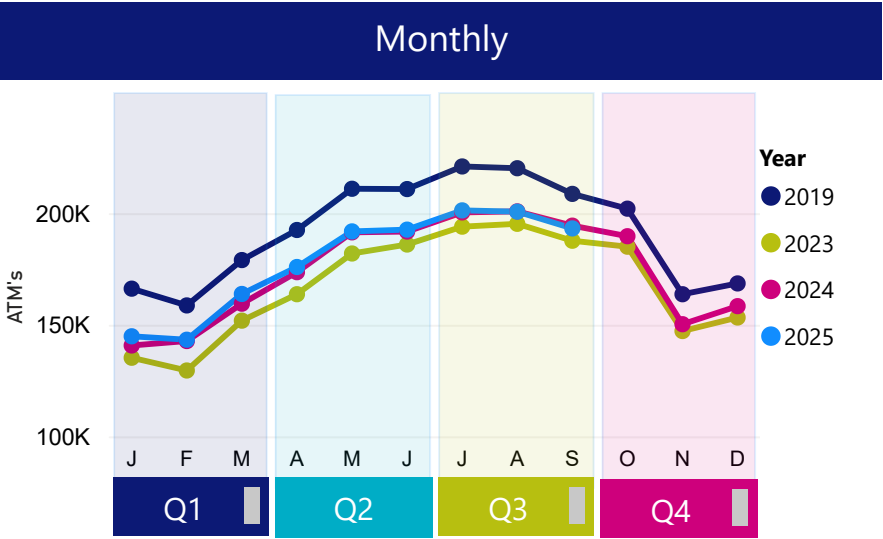
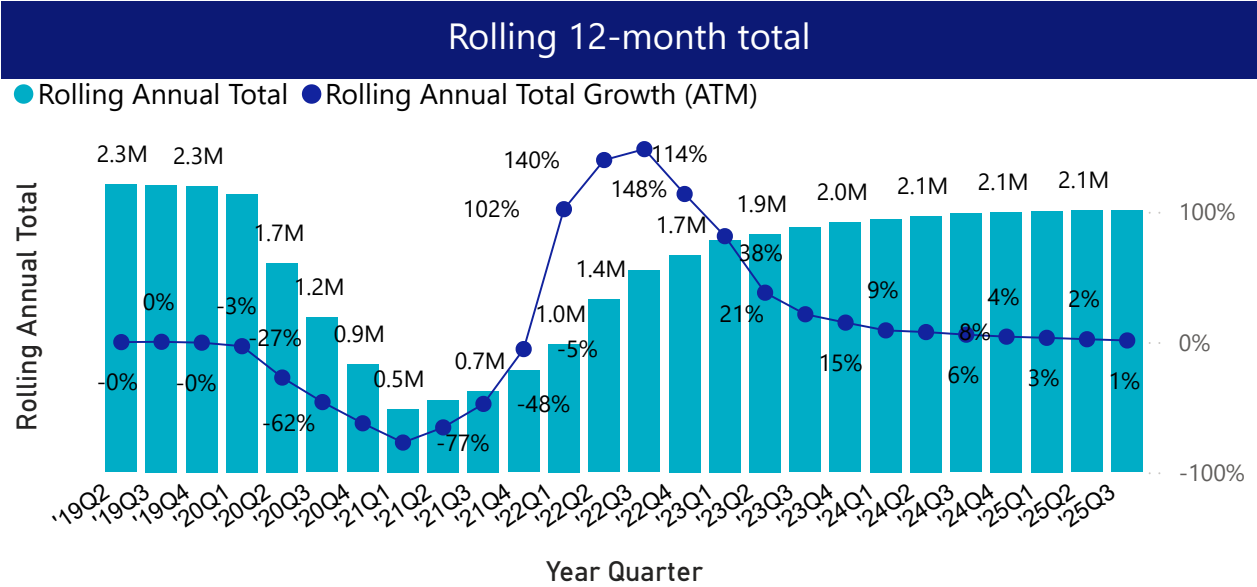
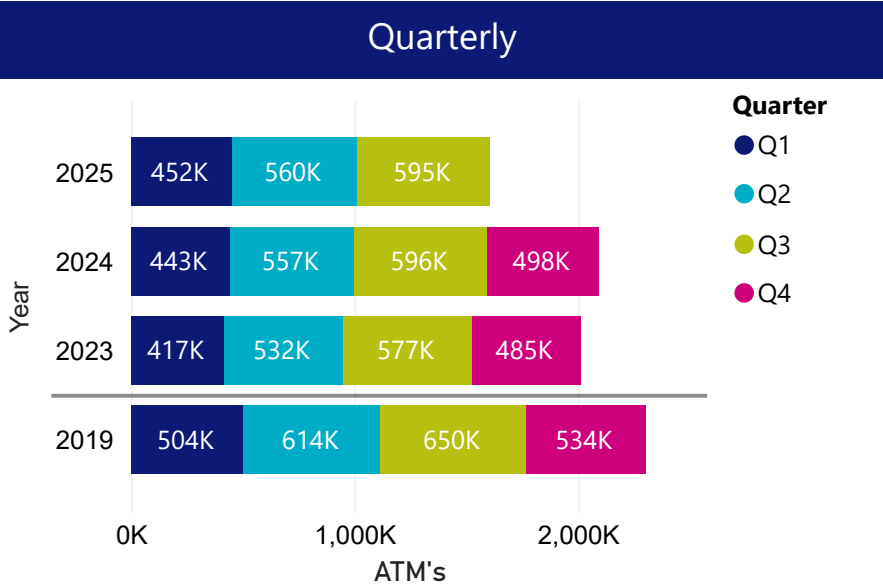


The number of ATM's in Q3 was 595K slightly down from 596K in the same period last year.

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)

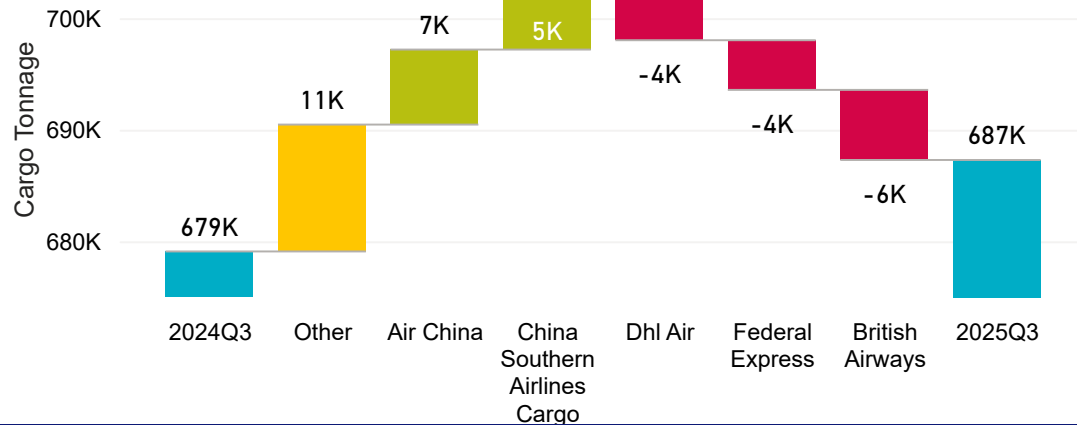
5 Year Trend



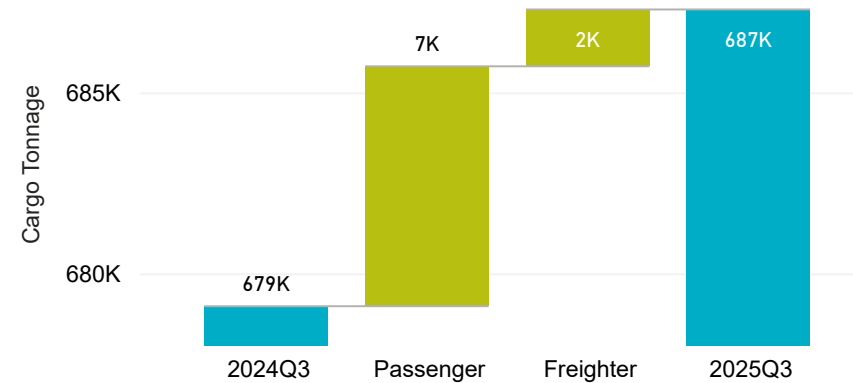
Cargo Tonnage - Q3 2025

Year-on-year comparison

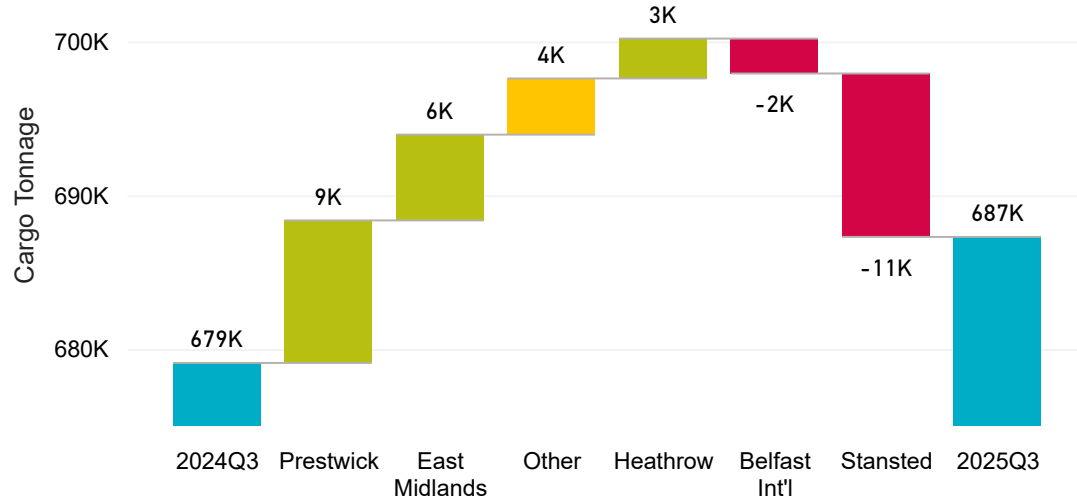
Cargo tonnage by airline



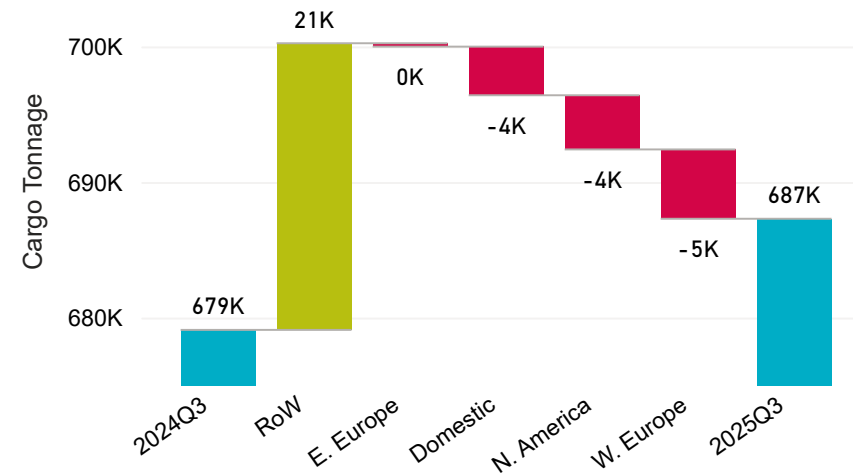
Cargo tonnage by passenger & freighter services



Cargo tonnage by reporting airport



Cargo tonnage by market



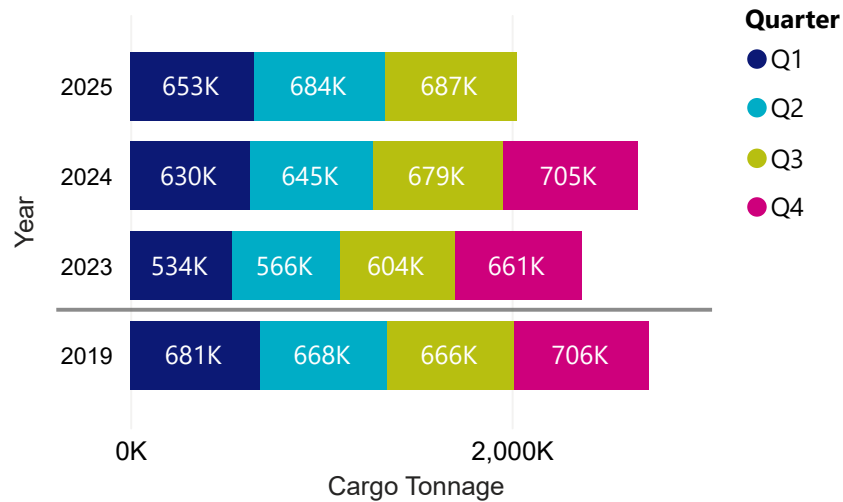
Cargo Tonnage in Q3 was 687K up from 679K in the same period last year.

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".

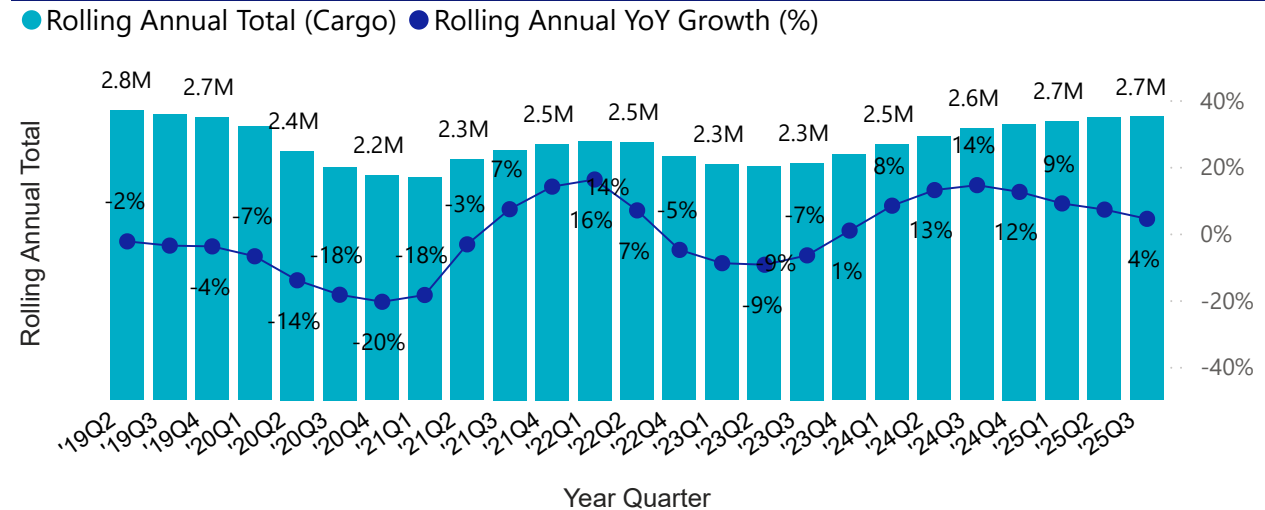
Cargo Tonnage

5 Year Trend

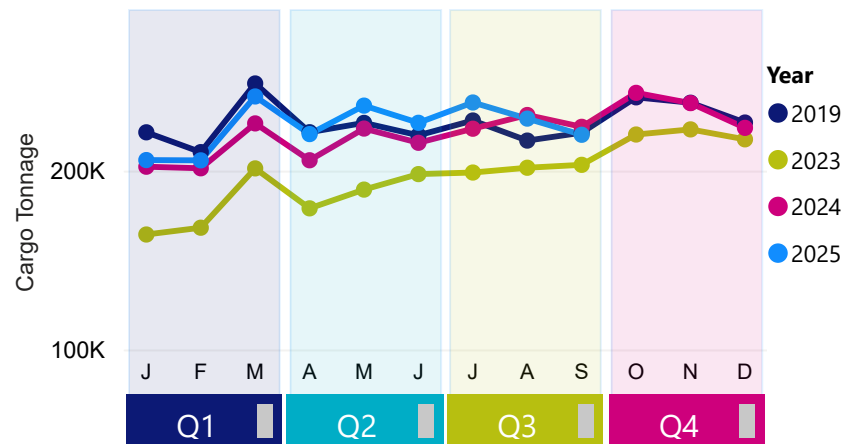
Quarterly



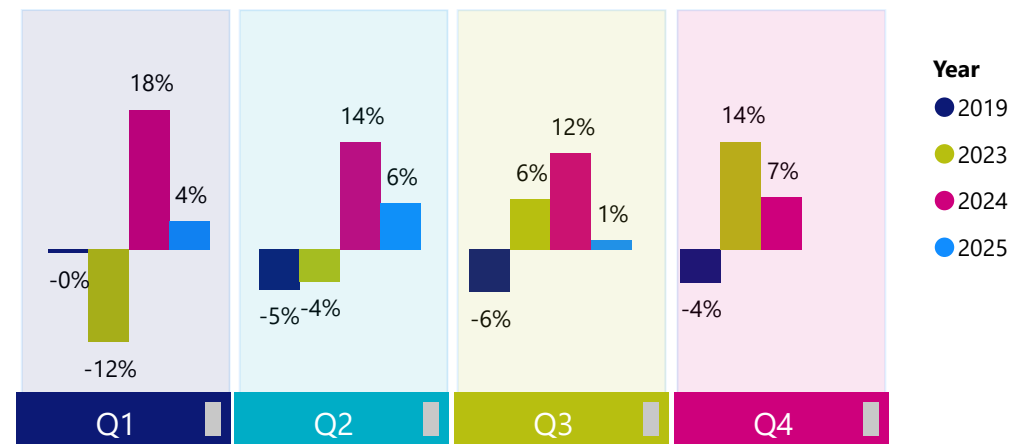
Rolling 12-month total



Monthly



Year-on-year % Variance



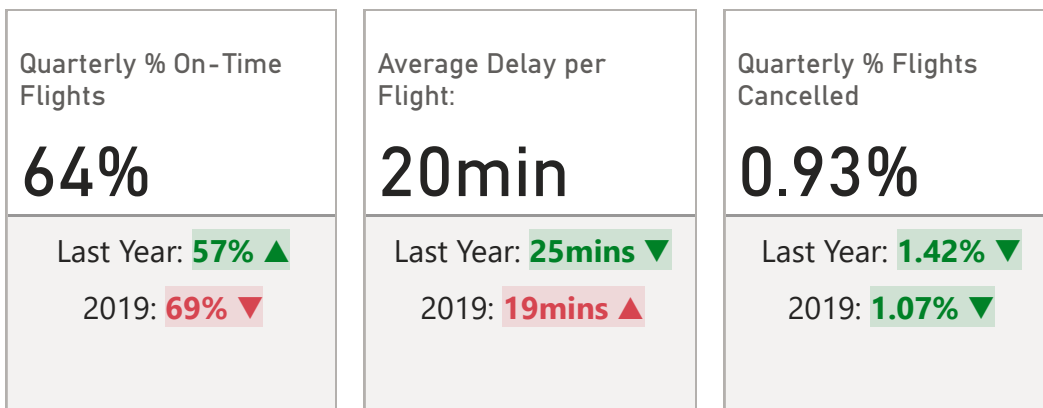
Punctuality Trends - Q3 2025

vs Last Year & 2019

NB: Delays can occur for multiple reasons - many of which are out of the control of industry operators

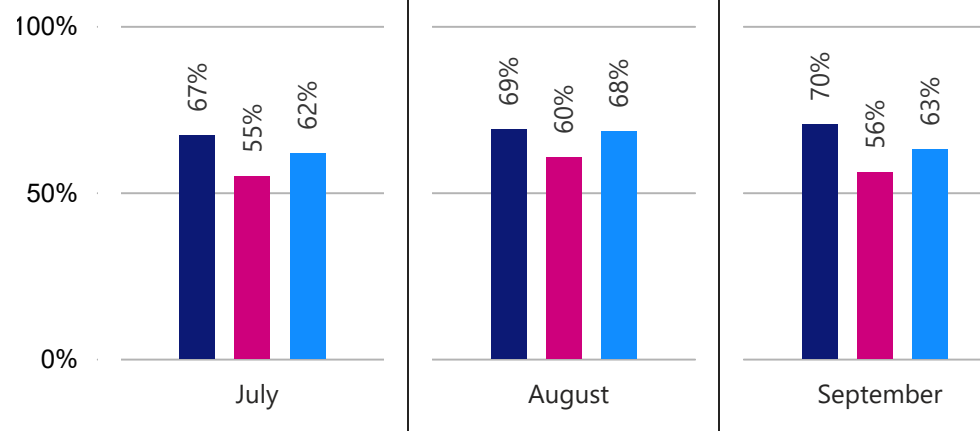


Quarterly Results



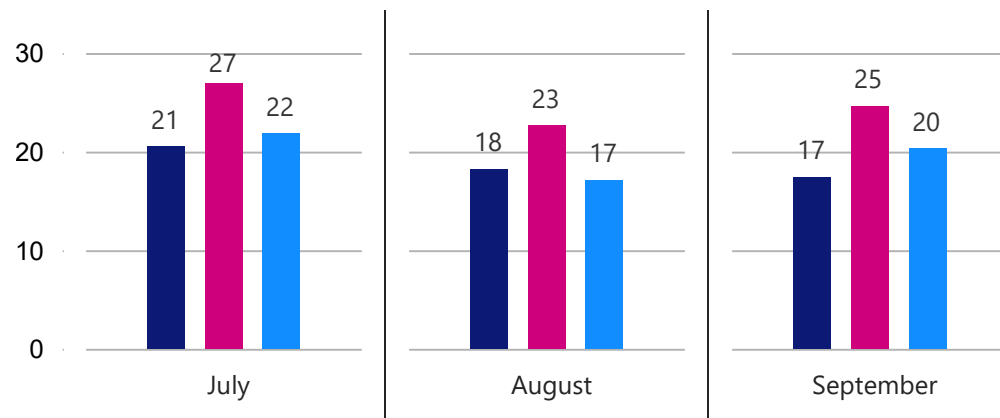
% On-Time Flights (within 15mins of schedule)

Year ● 2019 ● 2024 ● 2025



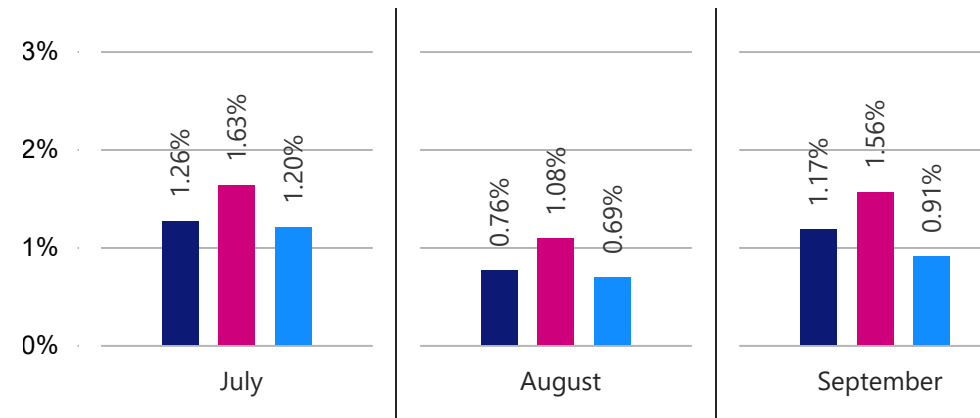
Average Delay per Flight (mins)

Year ● 2019 ● 2024 ● 2025



% Flights Cancelled (inside 24hr before departure)

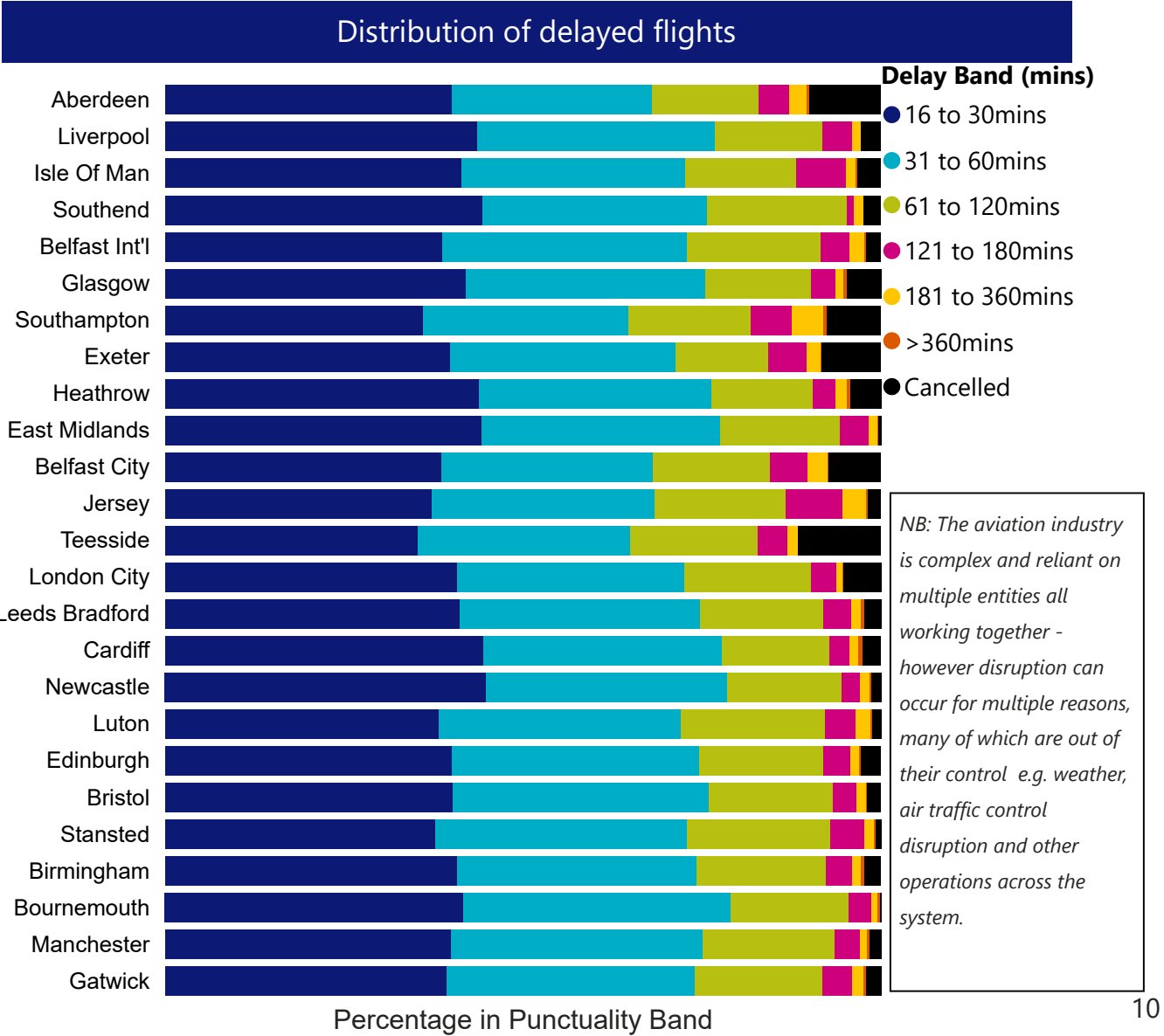
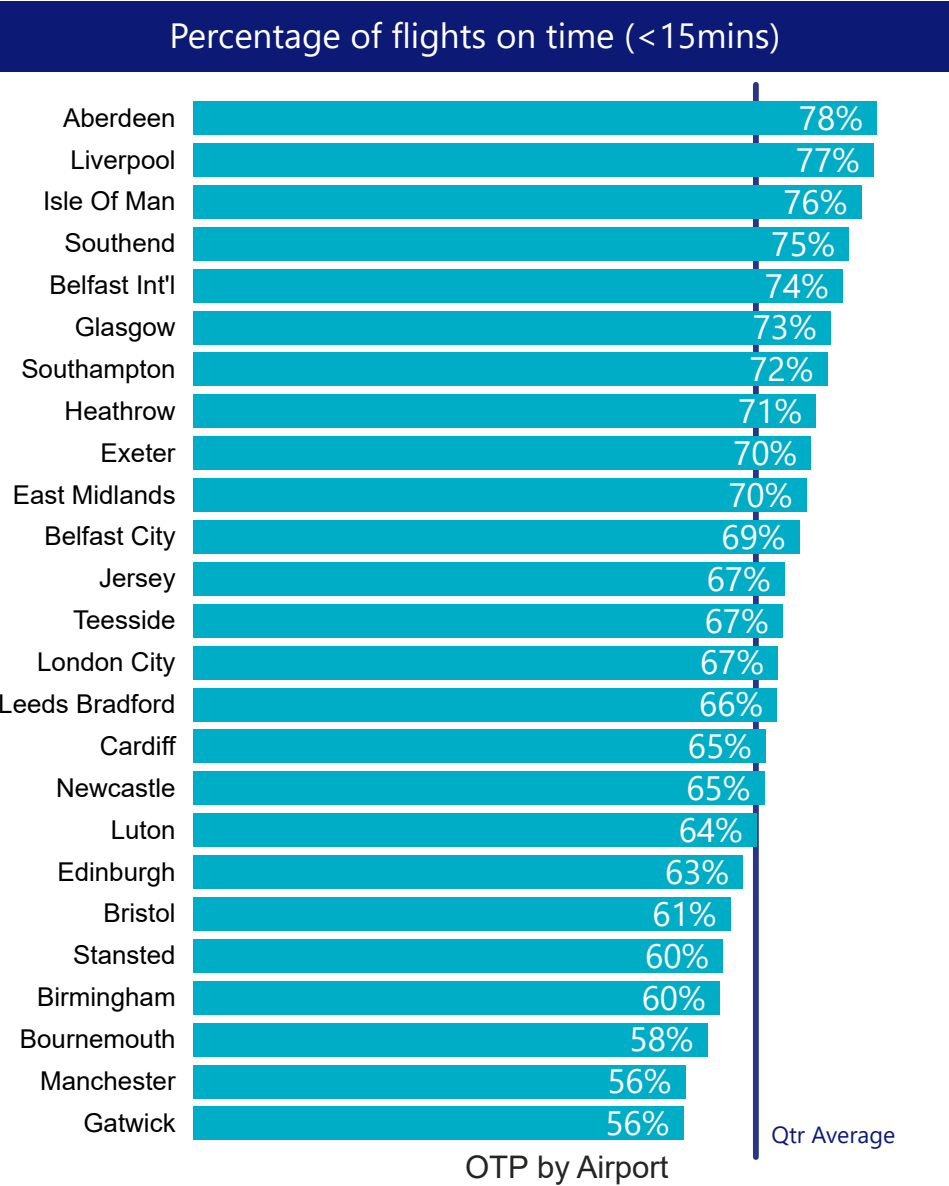
Year ● 2019 ● 2024 ● 2025



Flight Punctuality - Q3 2025 (UK Arrivals & Departures)

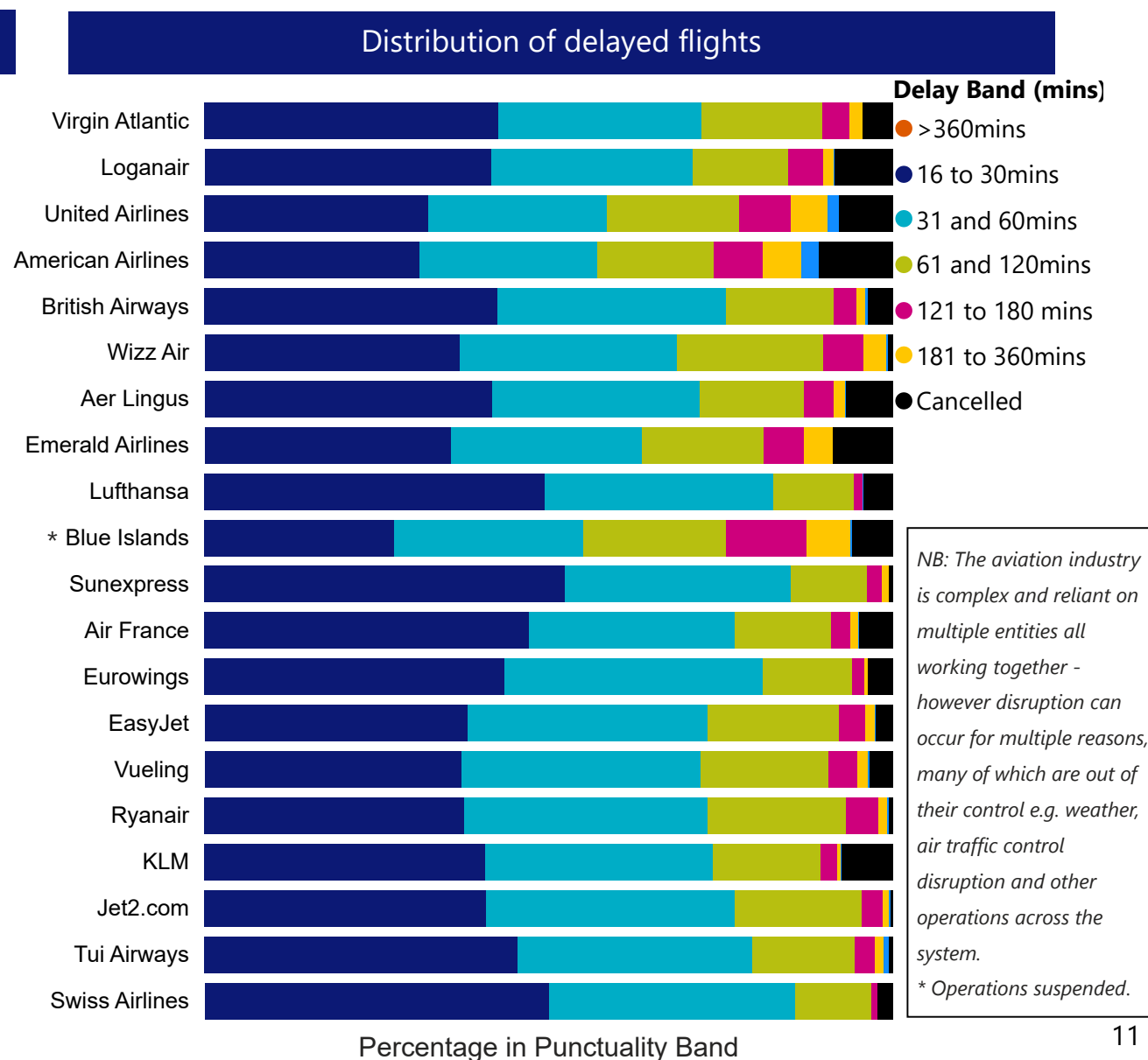
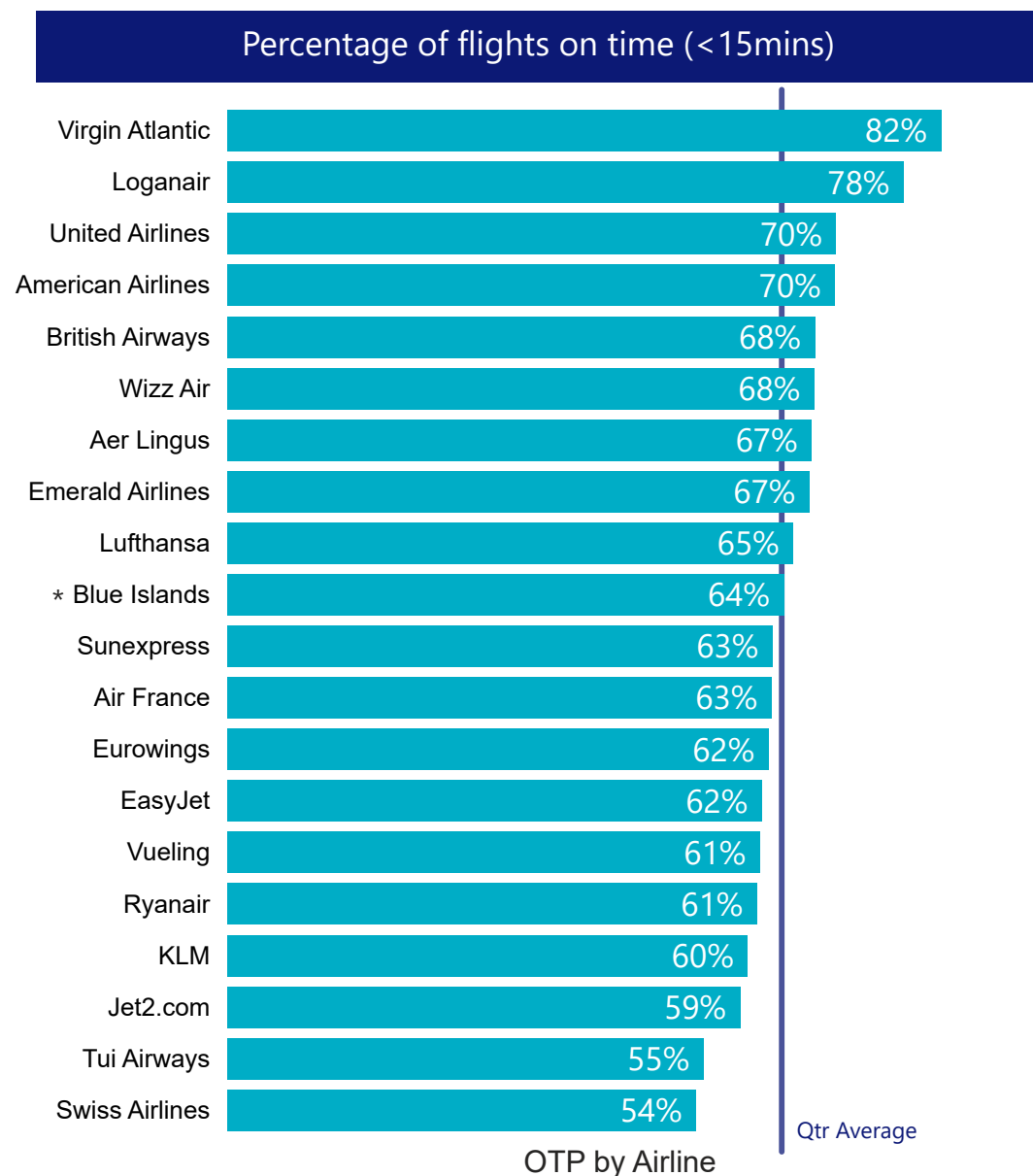


CAA (UK) reporting airports



Flight Punctuality - Q3 2025 (UK Arrivals & Departures)

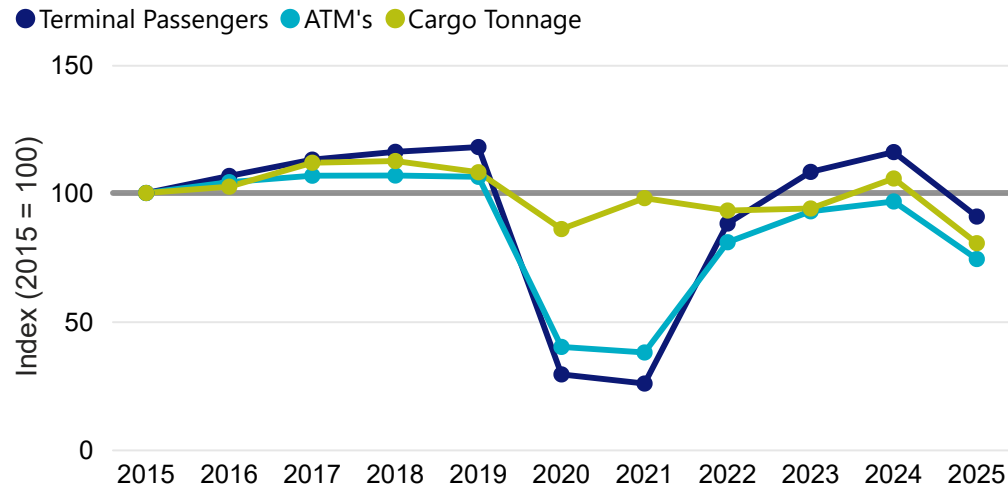
Top 20 largest airlines by ATM's



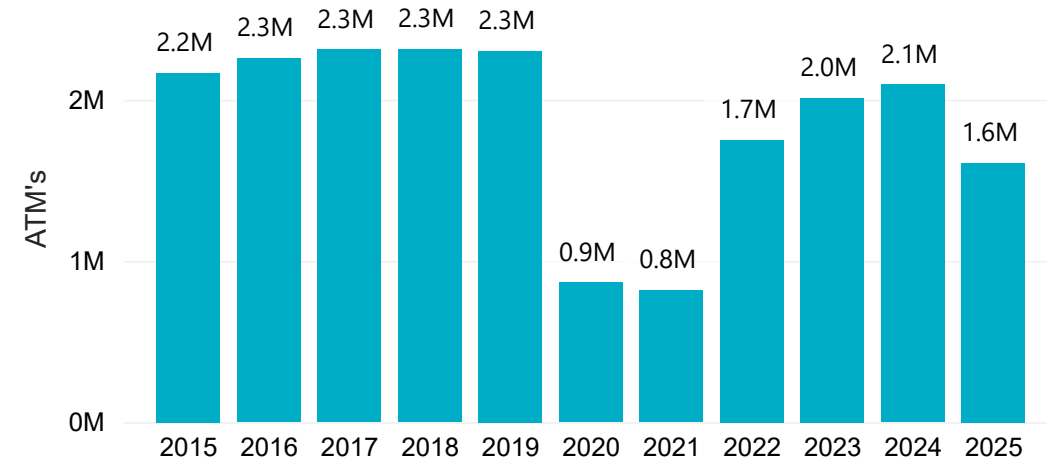
10 year trends

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

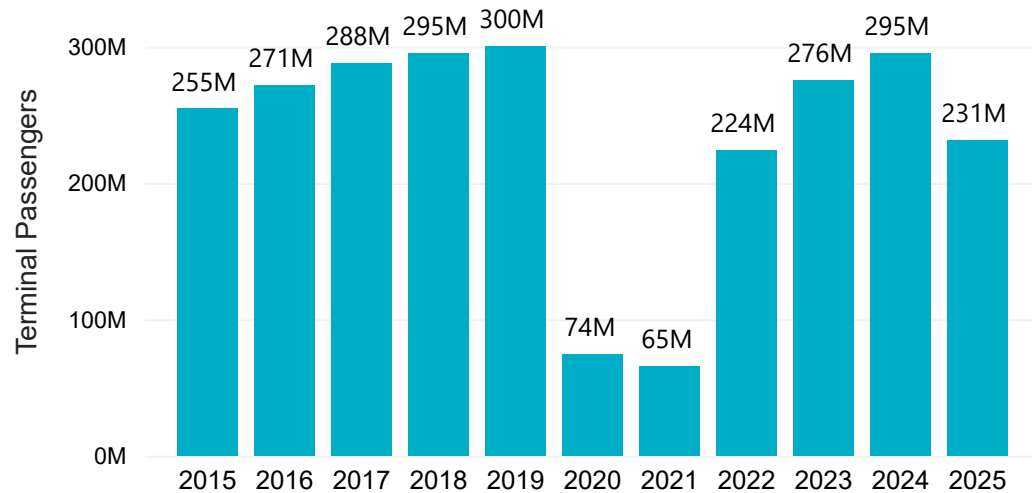
Indexed passenger, ATM and cargo growth (2015 = 100)



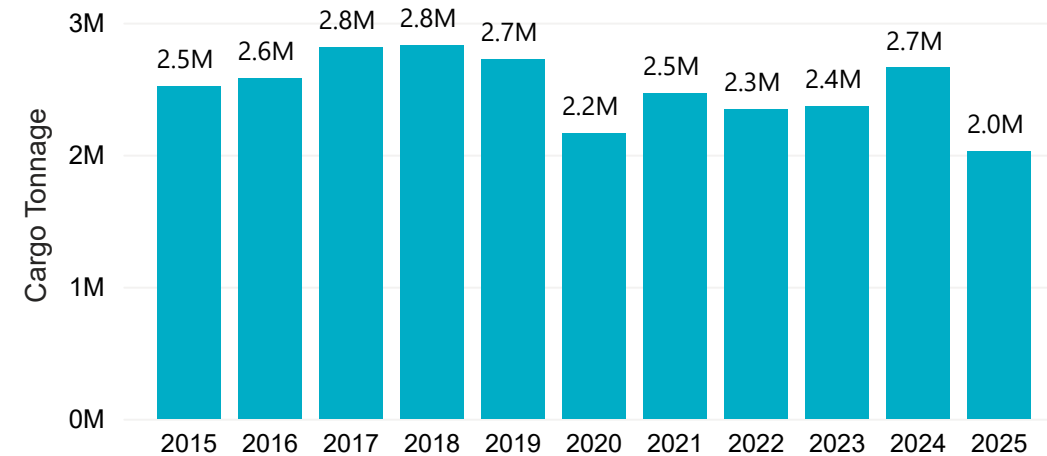
ATM's (millions)



Terminal passengers (millions)



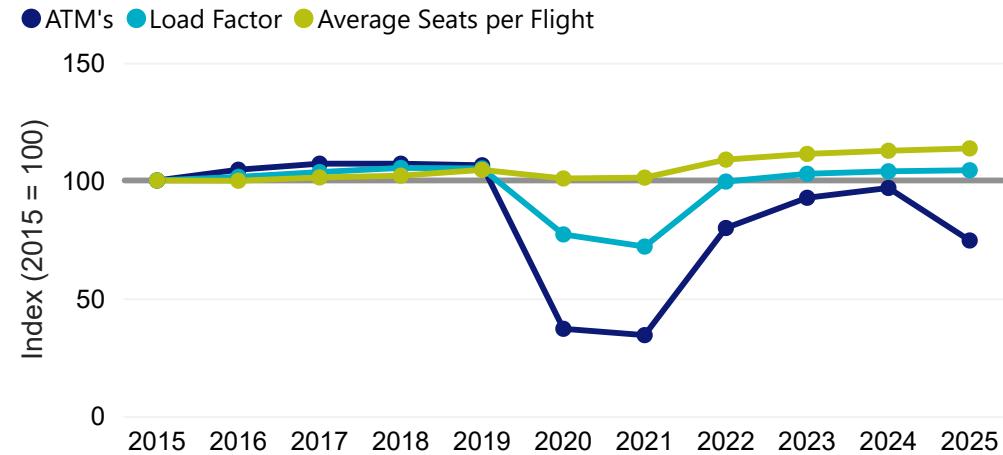
Cargo tonnage (millions)



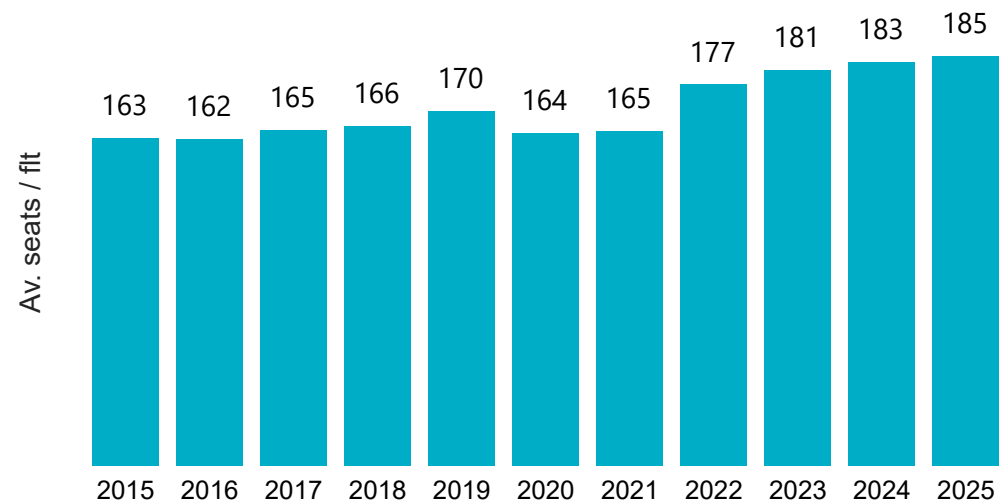
10 Year trends

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

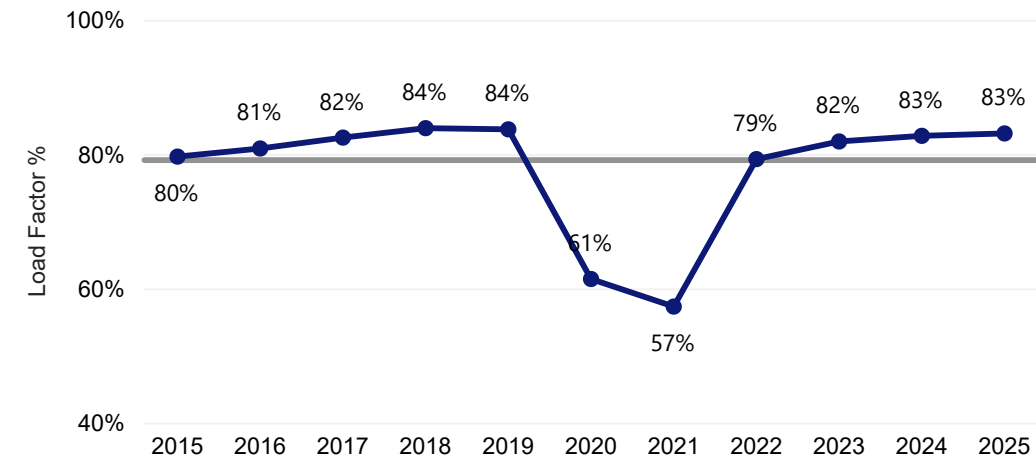
Indexed ATM, load factor and average seats per flight (2015 = 100)



Average seats per flight



Average load factor (%)

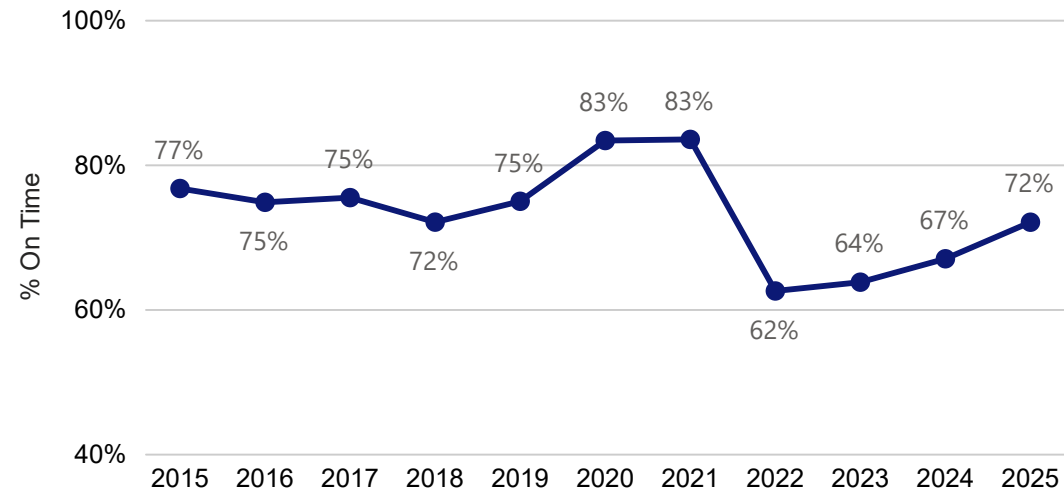


NB: Load Factor (%) represents the proportion of seats on a flight used on a flight i.e. Terminal Passengers / Total Seats.

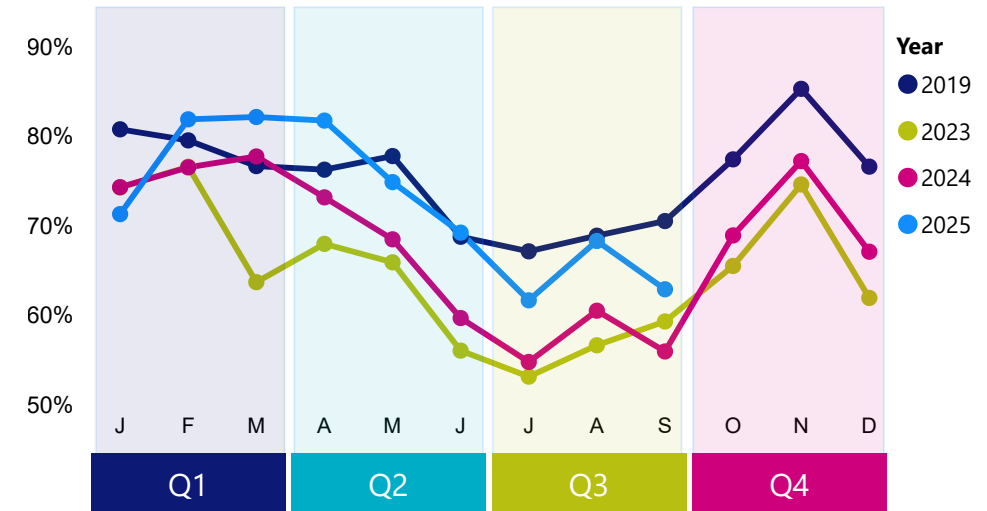
10 Year trends

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

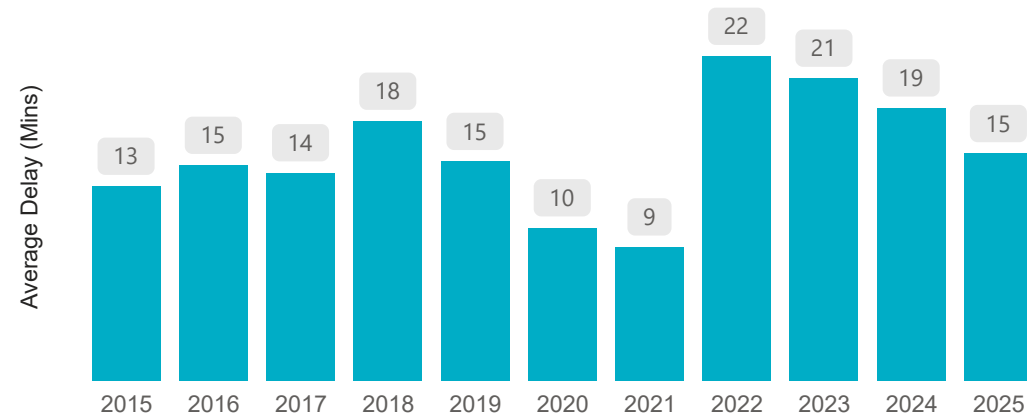
% On-time performance (OTP) <15mins



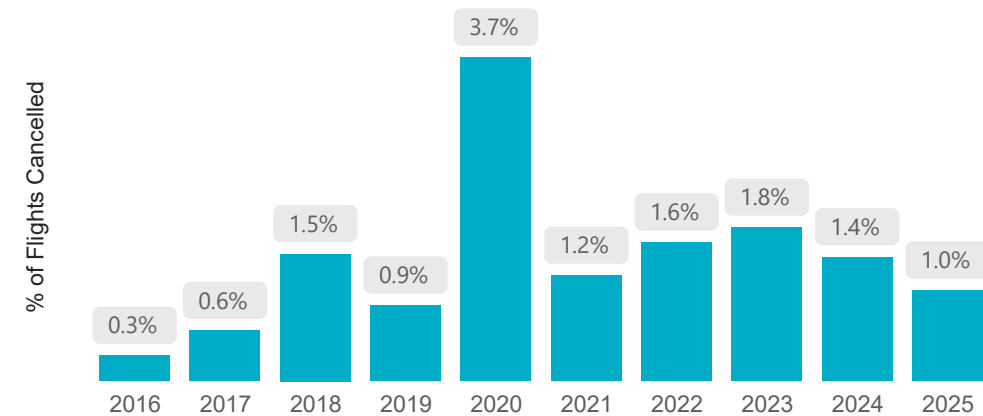
% OTP by month (last five years)



Average delay minutes per flight



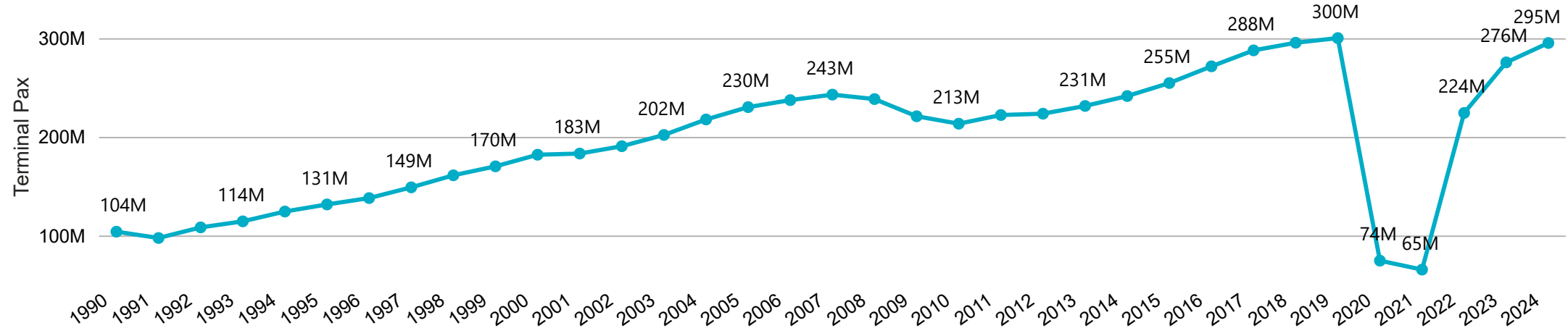
% of flights cancelled (within 24hr before departure)



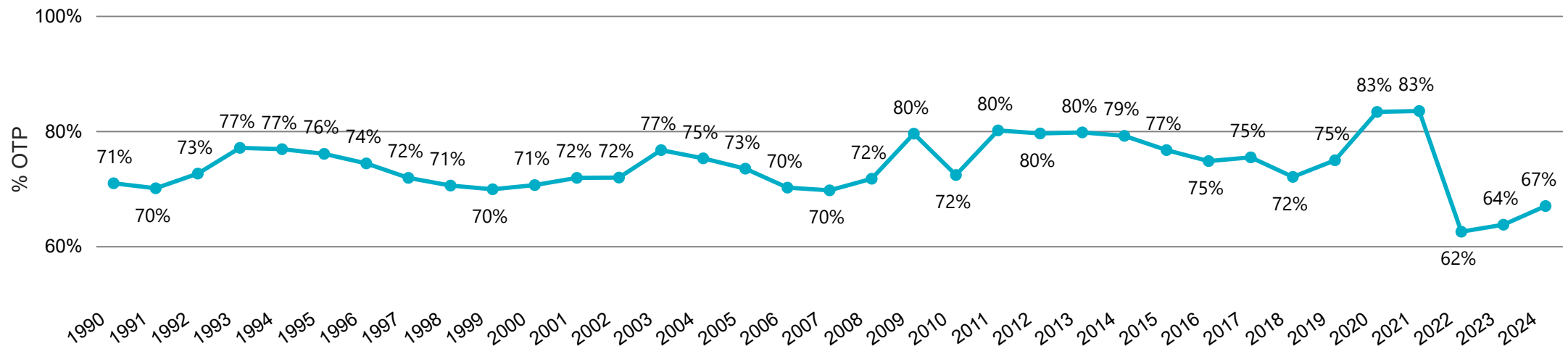
Trend since 1990 (30+ years)

Terminal Passengers and % On-Time Performance

Annual UK Terminal Passengers (1990 - 2024)



On-Time Performance (within 15mins of schedule)

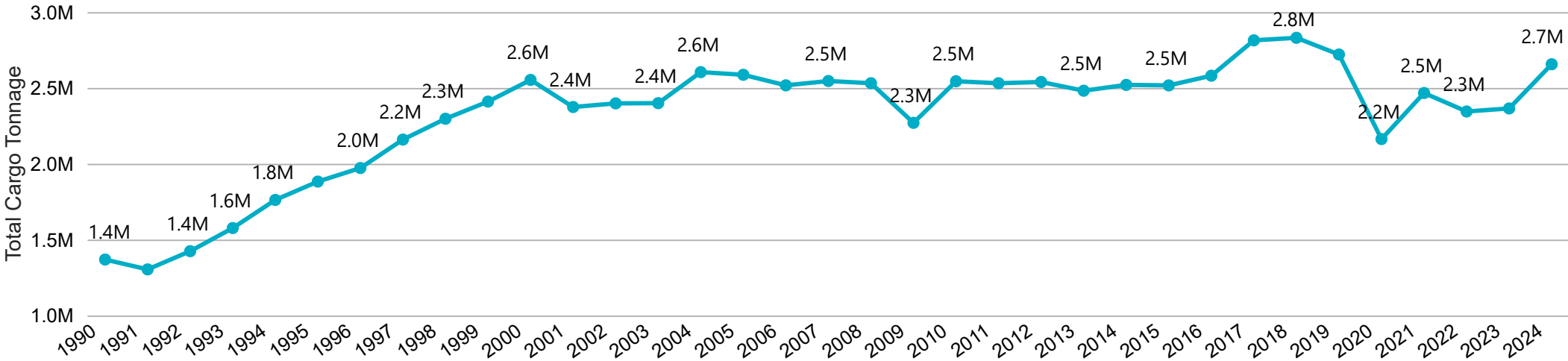


Trends since 1990 (30+ years)

Cargo Tonnage



Annual UK Cargo Tonnage (1990 - 2024)



Data Tables (Latest Quarter): *Terminal Passengers* - Q3 2025

Top 25 UK reporting airports			
Reporting Airport	Term. Passengers	% YoY	
Heathrow	23,365,385	1%	▲
Gatwick	13,242,362	-2%	▼
Manchester	9,879,679	3%	▲
Stansted	8,620,945	-1%	▼
Edinburgh	5,178,630	9%	▲
Luton	5,165,002	4%	▲
Birmingham	4,325,618	5%	▲
Bristol	3,465,793	0%	▲
Glasgow	2,466,777	1%	▲
Belfast Int'l	1,985,058	-2%	▼
Newcastle	1,789,683	5%	▲
Liverpool	1,730,407	10%	▲
Leeds Bradford	1,539,093	5%	▲
East Midlands	1,488,782	-4%	▼
London City	1,021,061	6%	▲
Aberdeen	659,189	-0%	▼
Belfast City	628,230	-4%	▼
Bournemouth	534,571	28%	▲
Jersey	456,046	-5%	▼
Cardiff	361,014	9%	▲
Southampton	256,490	2%	▲
Inverness	244,065	-2%	▼
Southend	243,864	135%	▲
Exeter	220,287	35%	▲
Prestwick	217,007	15%	▲
Total	89,085,038	2%	▲

Top 25 Airlines			
Airline (groups)	Term. Passengers	% YoY	
EasyJet	17,609,142	0%	▲
Ryanair	16,348,137	3%	▲
British Airways	14,634,180	1%	▲
Jet2.com	7,765,305	4%	▲
Tui Airways	4,798,088	-3%	▼
Wizz Air	3,208,751	4%	▲
Virgin Atlantic	1,653,952	5%	▲
Emirates	1,537,121	-1%	▼
Aer Lingus	1,285,317	-1%	▼
KLM	1,261,321	3%	▲
American Airlines	1,097,944	-1%	▼
Vueling	1,069,100	2%	▲
Lufthansa	976,574	-5%	▼
Qatar Airways	972,830	14%	▲
Loganair	771,004	0%	▲
United Airlines	769,089	-5%	▼
Turkish Airlines	679,795	8%	▲
Sunexpress	653,632	17%	▲
Delta Airlines	554,730	6%	▲
Air Canada	528,495	-2%	▼
SAS	464,687	1%	▲
Swiss Airlines	452,755	7%	▲
Eurowings	432,759	4%	▲
Pegasus Airlines	414,426	6%	▲
Etihad Airways	401,296	23%	▲
Total	80,340,430	2%	▲

Top 25 international destinations			
OD Airport Name	Term. Passengers	% YoY	
Palma De Mallorca	2,712,703	2%	▲
Dublin	2,697,234	4%	▲
Amsterdam	2,184,714	-3%	▼
Alicante	2,047,406	7%	▲
Malaga	1,998,292	7%	▲
Faro	1,690,631	3%	▲
Dubai	1,658,823	-0%	▼
Barcelona	1,401,183	-3%	▼
Tenerife (Surreina Sofia)	1,394,735	2%	▲
Antalya	1,373,097	-3%	▼
New York (Jf Kennedy)	1,192,085	-4%	▼
Dalaman	1,170,591	-9%	▼
Paris (Charles De Gaulle)	1,117,654	3%	▲
Doha Hamad	1,040,282	11%	▲
Ibiza	971,221	0%	▲
Arrecife	875,194	1%	▲
Istanbul	868,081	5%	▲
Rhodes	834,526	8%	▲
Corfu	834,456	3%	▲
Lisbon	827,620	-7%	▼
Madrid	825,774	3%	▲
Frankfurt Main	777,884	-3%	▼
Copenhagen	734,003	-4%	▼
Nice	697,736	-2%	▼
Heraklion	681,209	10%	▲

Data Tables (Latest Quarter): *ATM's* - Q3 2025

Top 25 UK Reporting Airports		
Reporting Airport	ATM's	% YoY
Heathrow	124,824	-1% ▼
Gatwick	77,533	-2% ▼
Manchester	57,514	1% ▲
Stansted	52,635	-0% ▼
Edinburgh	35,303	5% ▲
Luton	29,692	2% ▲
Birmingham	27,792	4% ▲
Bristol	22,195	1% ▲
Glasgow	19,527	0% ▲
Aberdeen	14,593	-9% ▼
East Midlands	13,758	-5% ▼
Belfast Int'l	13,743	-8% ▼
London City	12,404	2% ▲
Newcastle	11,861	4% ▲
Liverpool	11,295	7% ▲
Leeds Bradford	10,802	5% ▲
Belfast City	7,048	-12% ▼
Jersey	4,820	-12% ▼
Guernsey	4,804	-6% ▼
Southampton	4,361	-6% ▼
Norwich	3,966	1% ▲
Bournemouth	3,501	36% ▲
Sumburgh	3,213	-14% ▼
Kirkwall	2,714	3% ▲
Inverness	2,595	-9% ▼
Total	572,493	-0% ▼

Top 25 international destinations		
OD Airport Name	ATM's	% YoY
Dublin	22,002	4% ▲
Amsterdam	18,914	-3% ▼
Palma De Mallorca	16,502	4% ▲
Alicante	11,784	7% ▲
Malaga	11,758	9% ▲
Faro	10,260	4% ▲
Paris (Charles De Gaulle)	9,563	-0% ▼
Barcelona	8,726	-2% ▼
Antalya	8,136	-2% ▼
Tenerife (Surreina Sofia)	7,654	3% ▲
Dalaman	7,137	-3% ▼
Frankfurt Main	6,329	-3% ▼
Ibiza	6,158	0% ▲
New York (Jf Kennedy)	5,432	-6% ▼
Lisbon	5,104	-5% ▼
Arrecife	5,060	3% ▲
Copenhagen	4,947	-8% ▼
Madrid	4,859	6% ▲
Corfu	4,738	1% ▲
Nice	4,725	-2% ▼
Istanbul	4,688	5% ▲
Rhodes	4,651	6% ▲
Dubai	4,110	2% ▲
Heraklion	3,811	10% ▲
Doha Hamad	3,539	8% ▲

ATM's by operation type		
Op. Type	ATM's	% YoY
Scheduled	558,319	1% ▲
Charter	36,806	-12% ▼

ATM's by market		
Market	ATM's	% YoY
W. Europe	361,725	2% ▲
Domestic	111,110	-9% ▼
RoW	44,398	7% ▲
E. Europe	41,667	2% ▲
N. America	36,233	1% ▲

Data Tables (Latest Quarter): *Cargo Tonnage - Q3 2025*

Cargo Tonnage by UK reporting airport		
Reporting Airport	Cargo Tonnage	% YoY
Heathrow	391,331	1% ▲
East Midlands	101,827	6% ▲
Stansted	69,421	-13% ▼
Gatwick	33,300	4% ▲
Manchester	26,348	6% ▲
Birmingham	14,024	-1% ▼
Prestwick	11,483	419% ▲
Bournemouth	9,143	14% ▲
Edinburgh	8,064	6% ▲
Luton	7,816	-0% ▼
Belfast Int'l	6,774	-25% ▼
Glasgow	2,568	-2% ▼
Aberdeen	1,533	-3% ▼
Newcastle	1,157	-25% ▼
Teesside	500	138% ▲
Guernsey	321	-47% ▼
Cardiff	312	183636% ▲
Kirkwall	308	64% ▲
Sumburgh	282	-21% ▼
Stornoway	252	8% ▲
Benbecula	177	20% ▲
Jersey	124	10% ▲
Islay	110	7% ▲
Humberside	39	101% ▲
Bristol	20	3581% ▲
Total	687,233	1%

Top 25 international destinations		
OD Airport Name	Cargo Tonnage	% YoY
Doha Hamad	35,011	6% ▲
New York (Jf Kennedy)	34,653	-13% ▼
Dubai	34,060	-1% ▼
Leipzig	30,154	-6% ▼
Los Angeles International	22,789	-4% ▼
Shanghai (Pu Dong)	18,544	36% ▲
Beijing	16,018	47% ▲
Chicago (O'Hare)	15,298	-7% ▼
Mumbai	14,419	23% ▲
Delhi	14,239	9% ▲
Cologne Bonn	14,214	-0% ▼
Hong Kong (Chek Lap Kok)	13,949	27% ▲
Istanbul	13,781	-5% ▼
Guangzhou Baiyun International	13,613	14% ▲
Singapore	13,243	5% ▲
Brussels	11,038	12% ▲
Riyadh	10,618	54% ▲
Miami International	10,576	0% ▲
Abu Dhabi International	9,974	-5% ▼
Paris (Charles De Gaulle)	9,936	-4% ▼
Toronto	9,554	4% ▲
Cincinnati	9,260	-6% ▼
Dallas/Fort Worth	8,765	7% ▲
Memphis	8,755	-1% ▼
Baku (Heyder Aliyev Int'L)	8,613	47% ▲

Cargo Tonnage by operation type		
Op. Type	Cargo Tonnage	% YoY
Scheduled	653,277	2% ▲
Charter	34,014	-10% ▼

Cargo Tonnage by market		
Market	Cargo Tonnage	% YoY
RoW	335,492	7% ▲
N. America	208,740	-2% ▼
W. Europe	117,265	-4% ▼
Domestic	24,794	-13% ▼
E. Europe	1,000	-20% ▼