



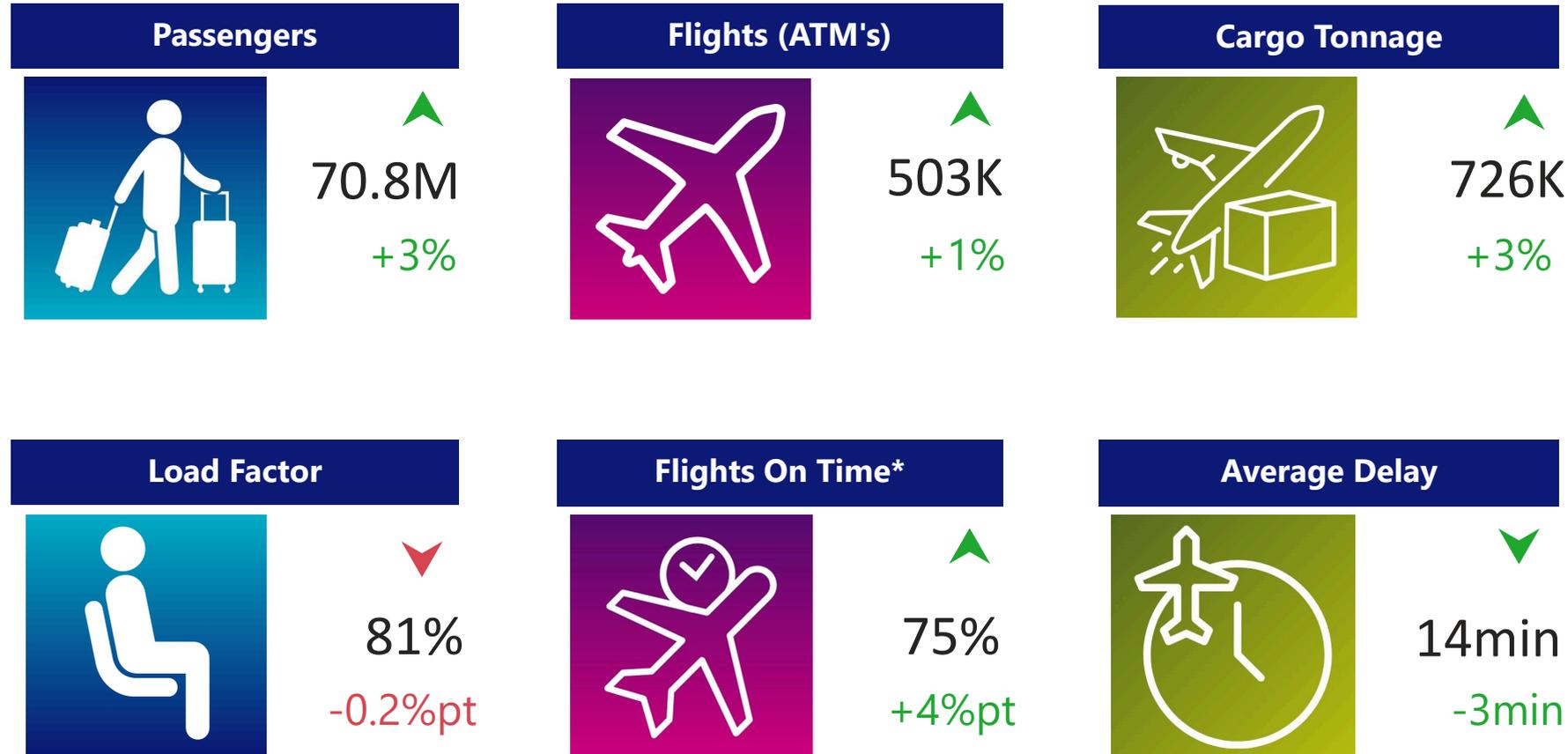
CAA Aviation Trends Quarter 4 2025

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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 - Q4 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.

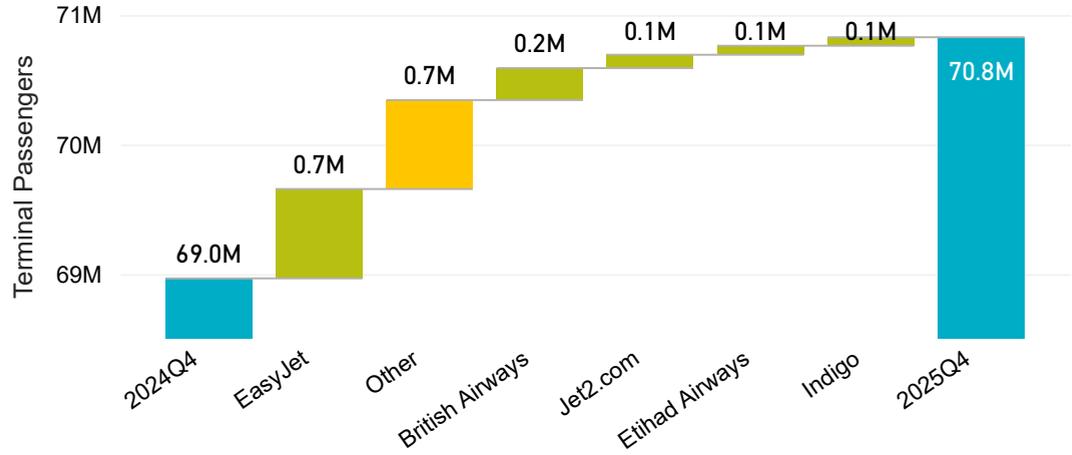
* A flight is considered "on time" if it arrives or departs the gate within 15 minutes of the scheduled time.

Terminal passengers Q4 2025

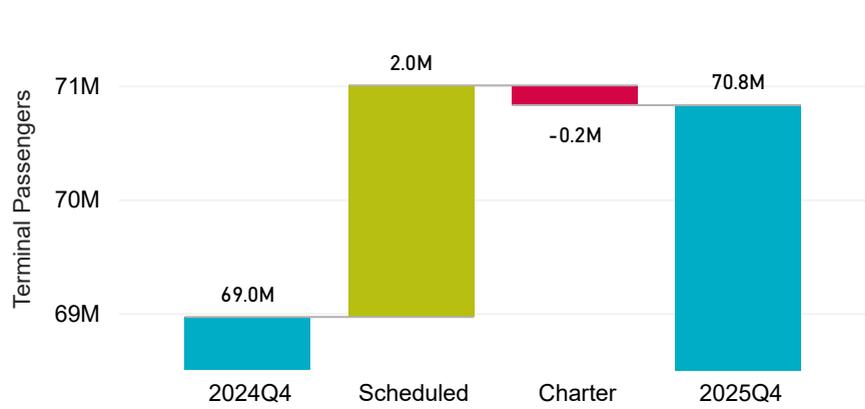
Year-on-year comparison



Terminal passengers by airline

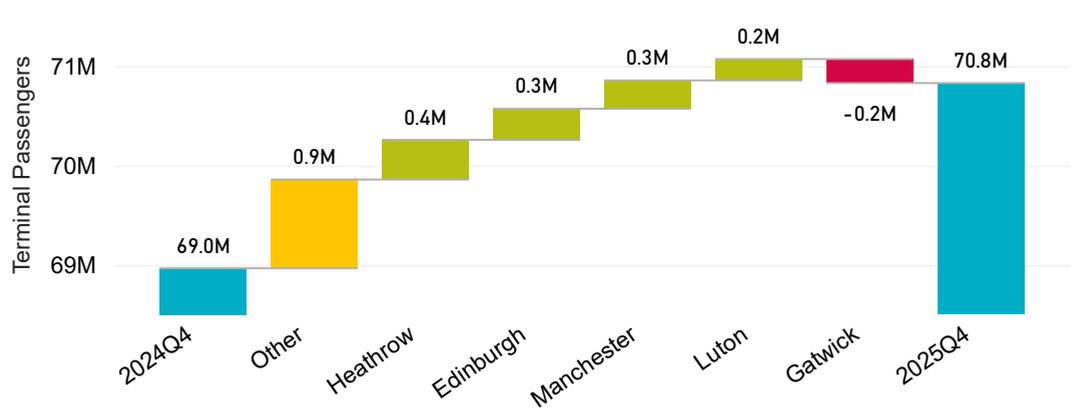


Terminal passengers by scheduled & charter services

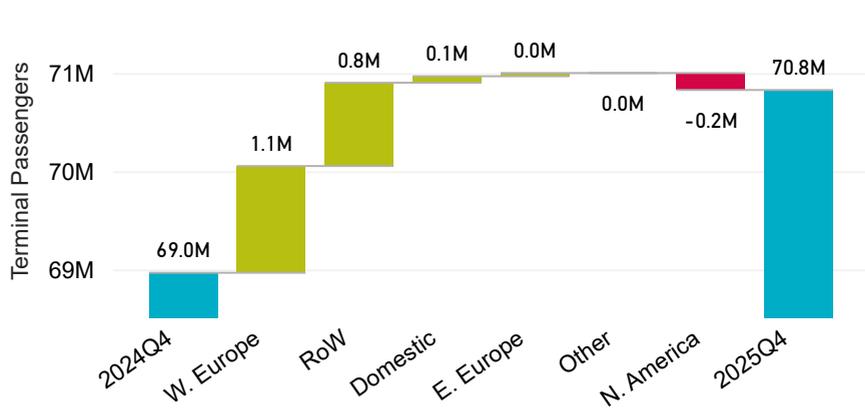


The number of terminal passengers in Q4 was 70.8M up from 69.0M in the same period last year.

Terminal passengers by reporting airport



Terminal passengers by market

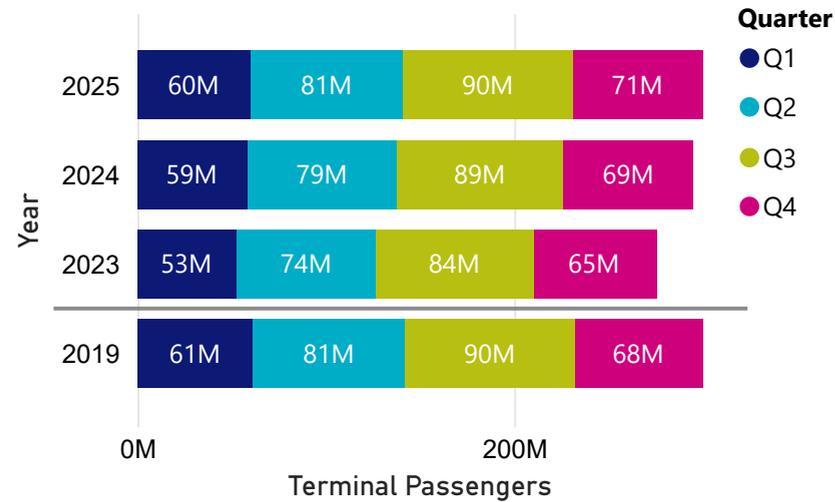


The charts on this page show the distribution of passenger growth across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

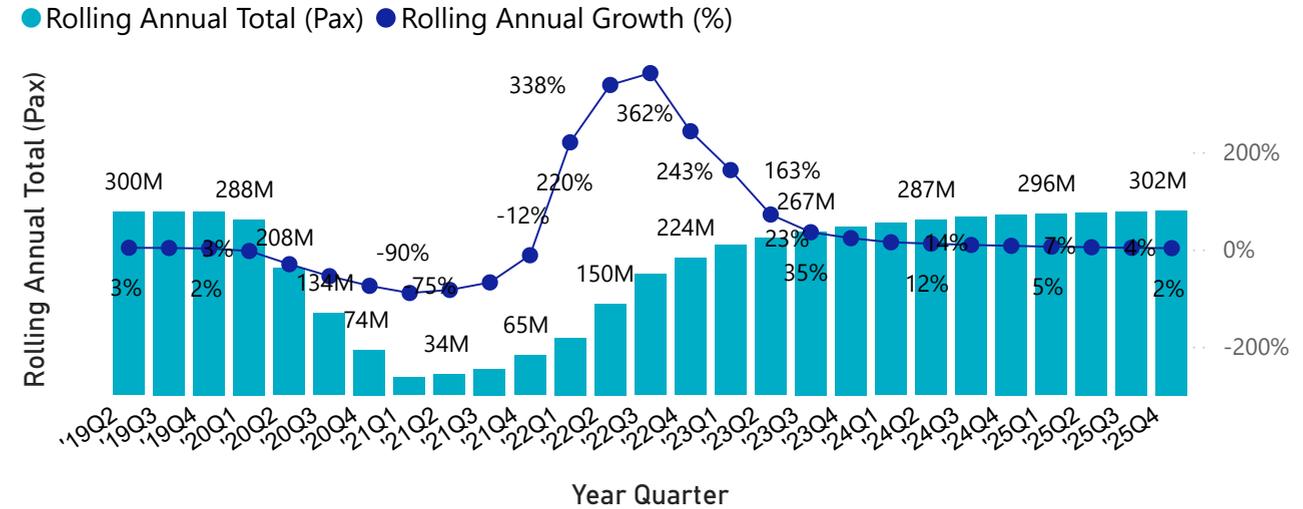
Terminal passengers

5 Year Trend

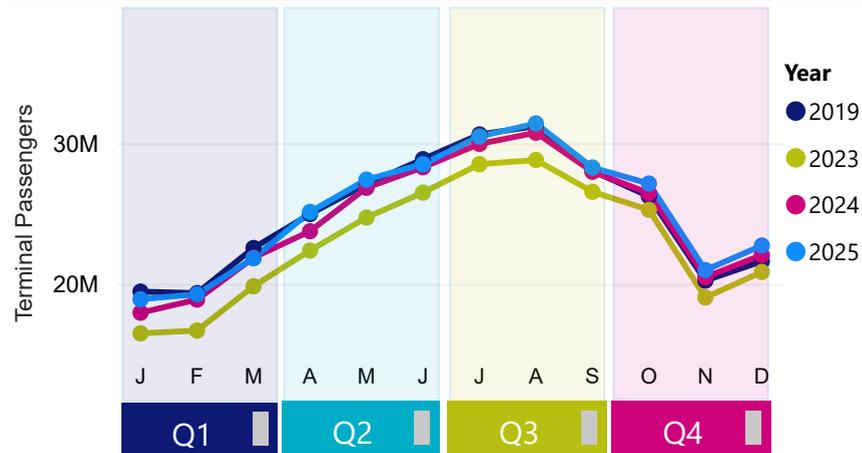
Quarterly



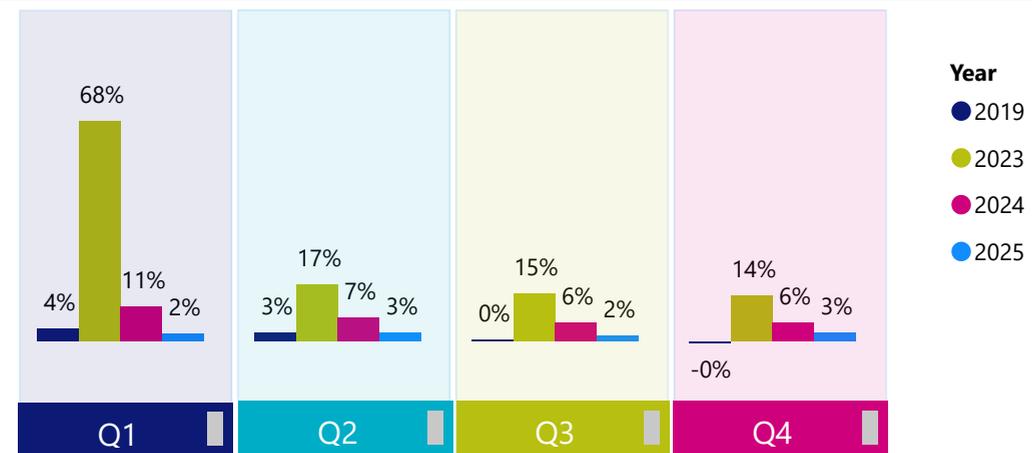
Rolling 12-month total



Monthly



Year-on-year % Variance

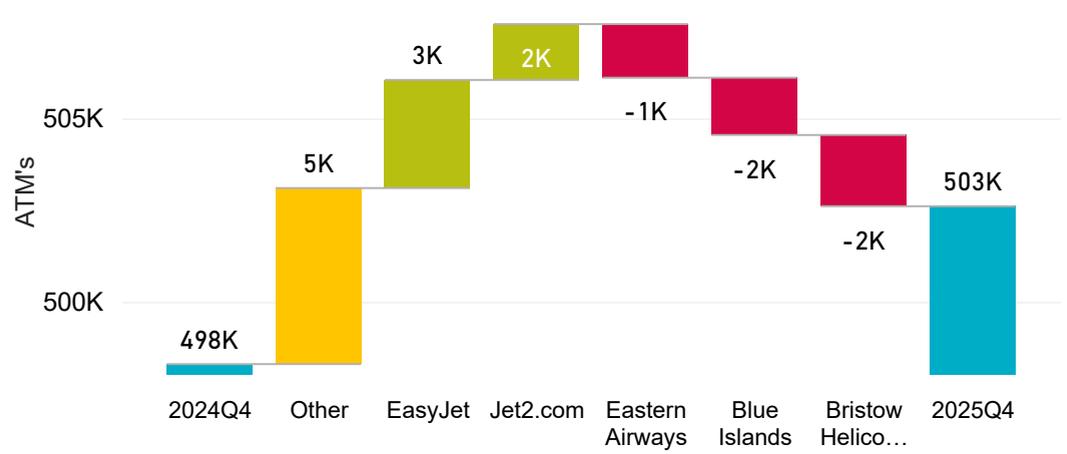


Air Transport Movements (ATM's) - Q4 2025

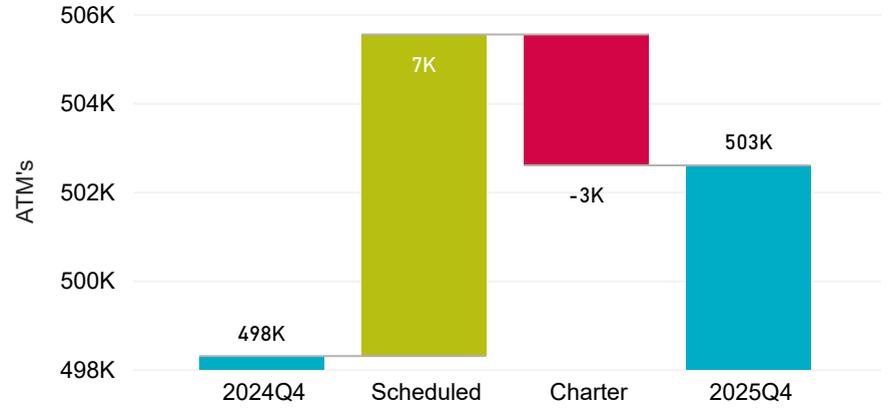
Year-on-year comparison



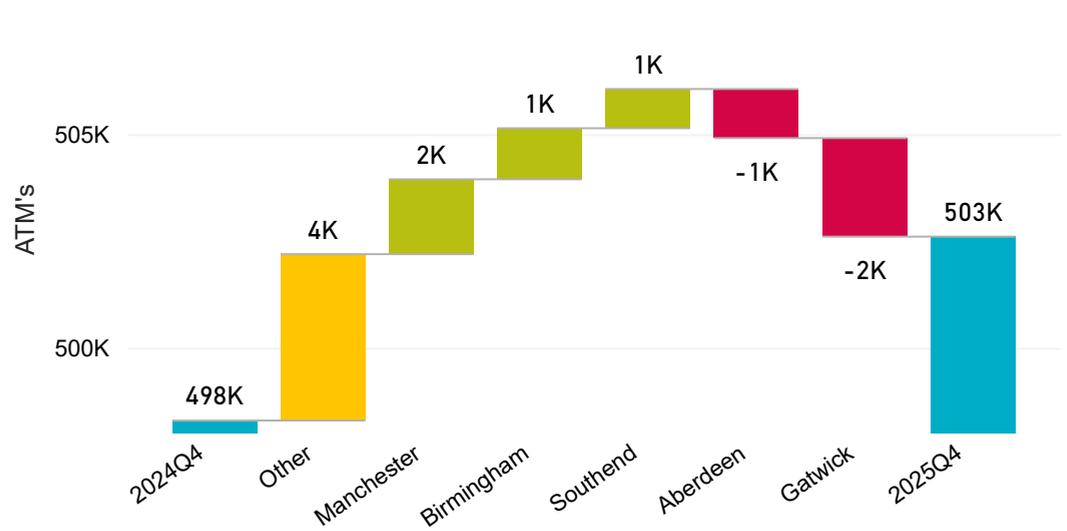
ATM's by airline



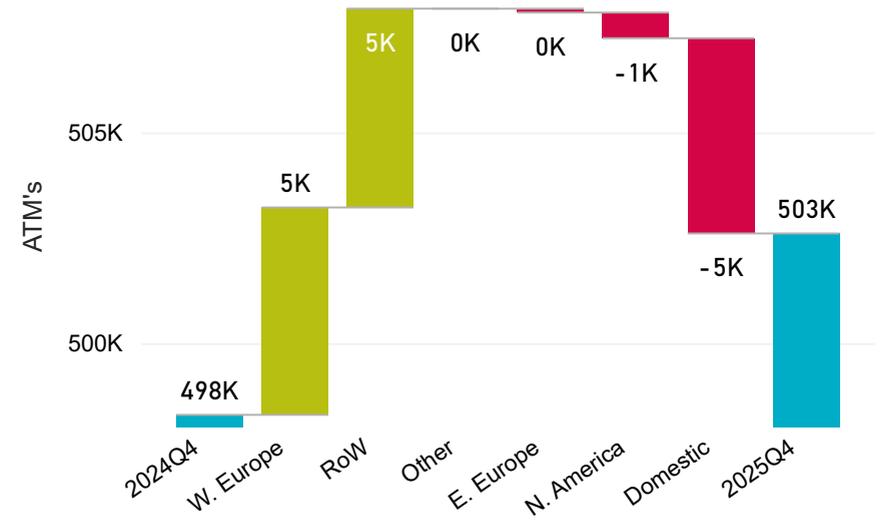
ATM's by scheduled & charter operation



ATM's by reporting airport



ATM's by market

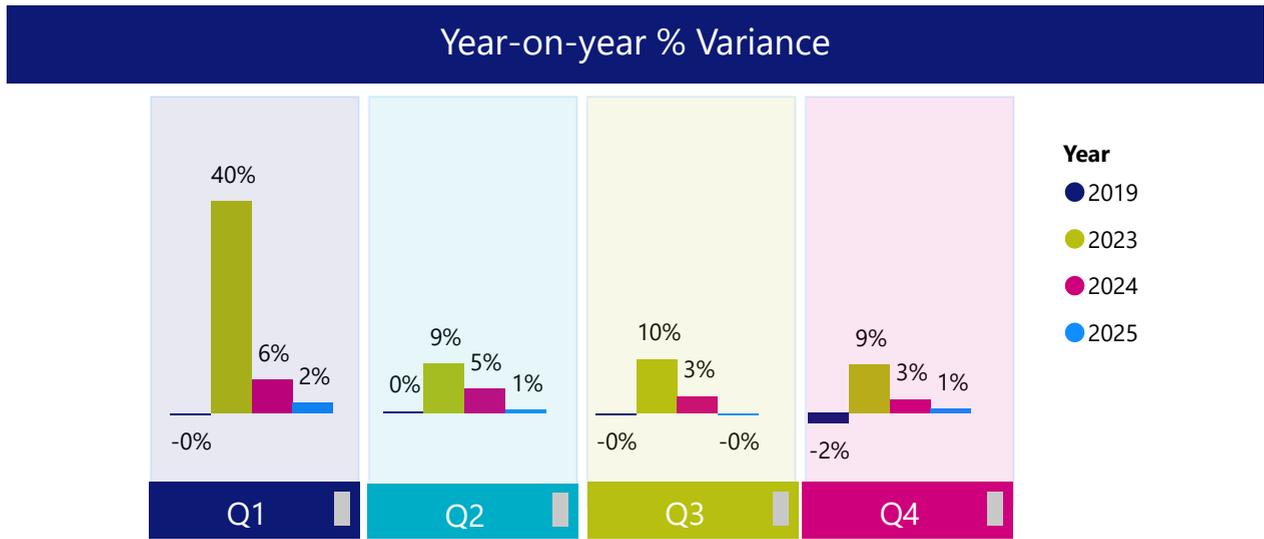
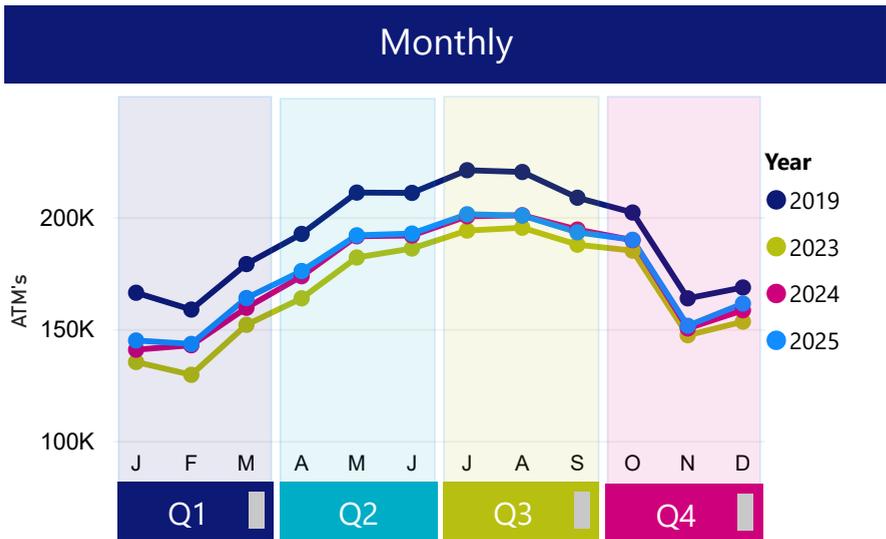
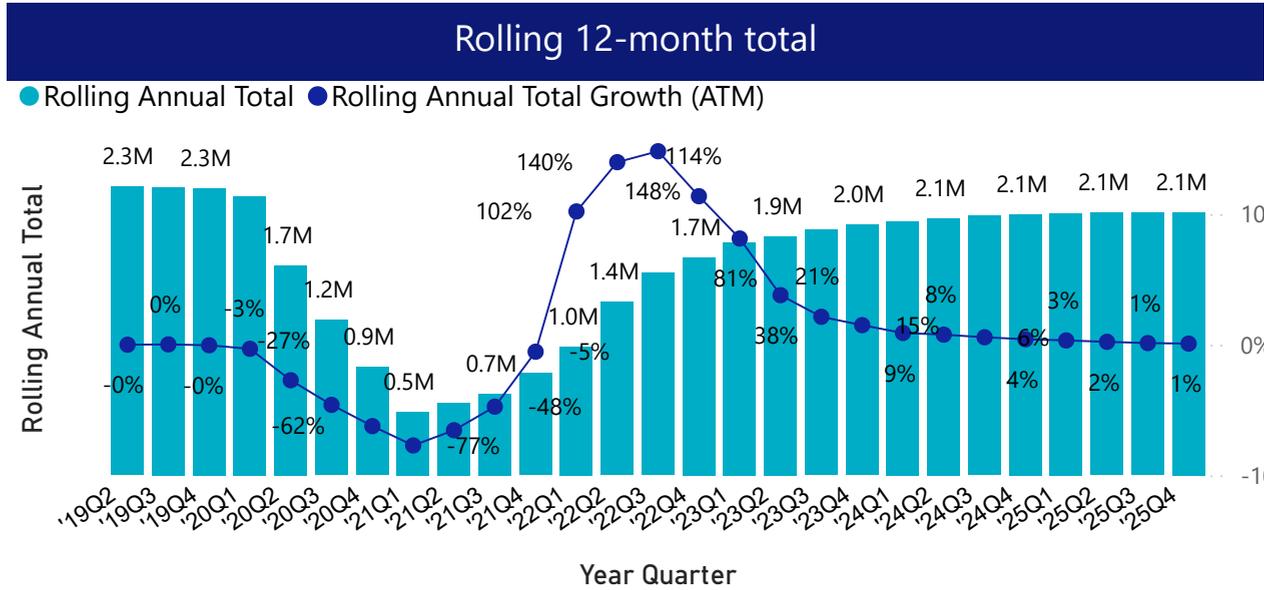
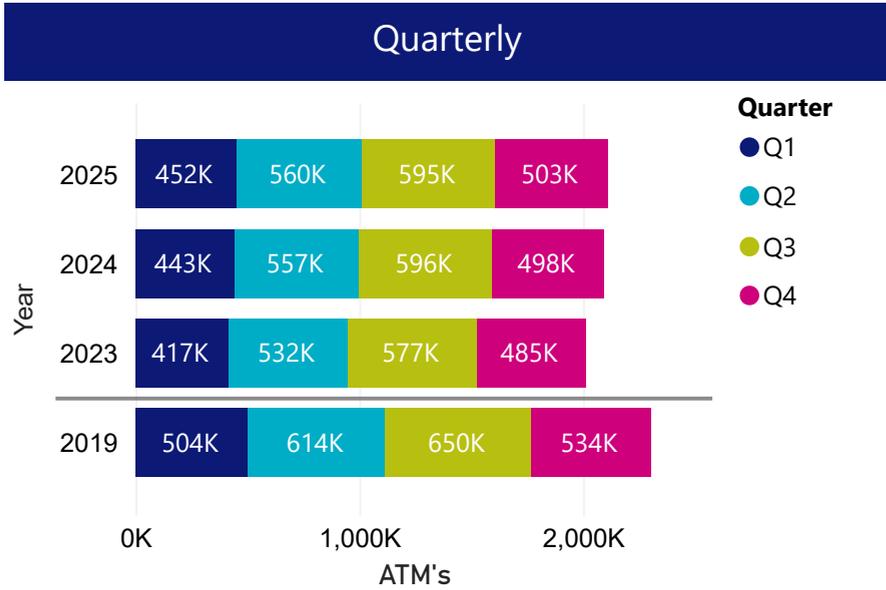


The number of ATM's in Q4 was 503K slightly up from 498K in the same period last year.

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

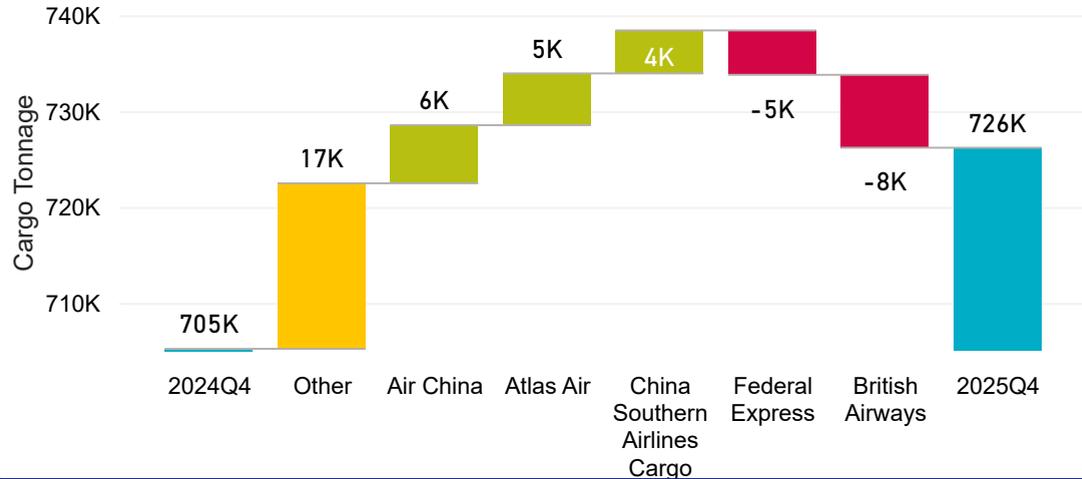


Cargo Tonnage - Q4 2025

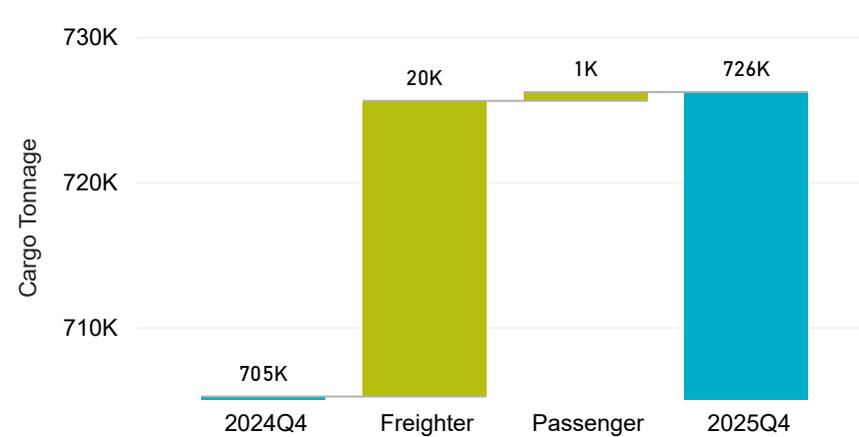
Year-on-year comparison



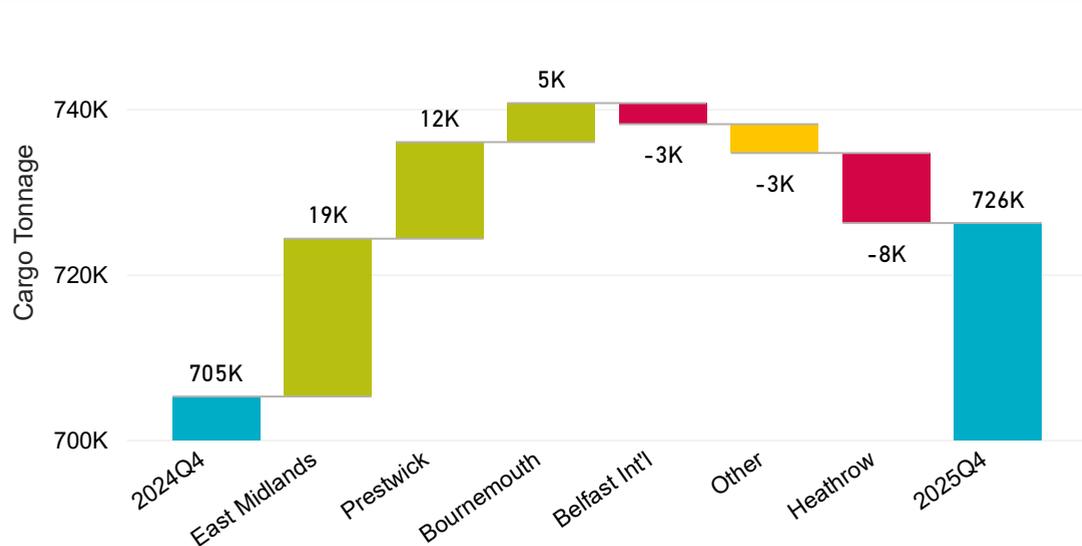
Cargo tonnage by airline



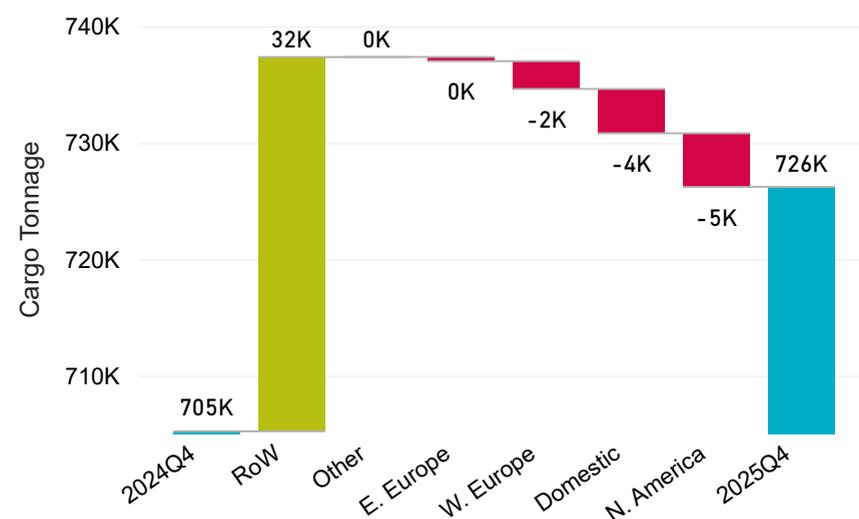
Cargo tonnage by passenger & freighter services



Cargo tonnage by reporting airport



Cargo tonnage by market



Cargo Tonnage in Q4 was 726K up from 705K in the same period last year.

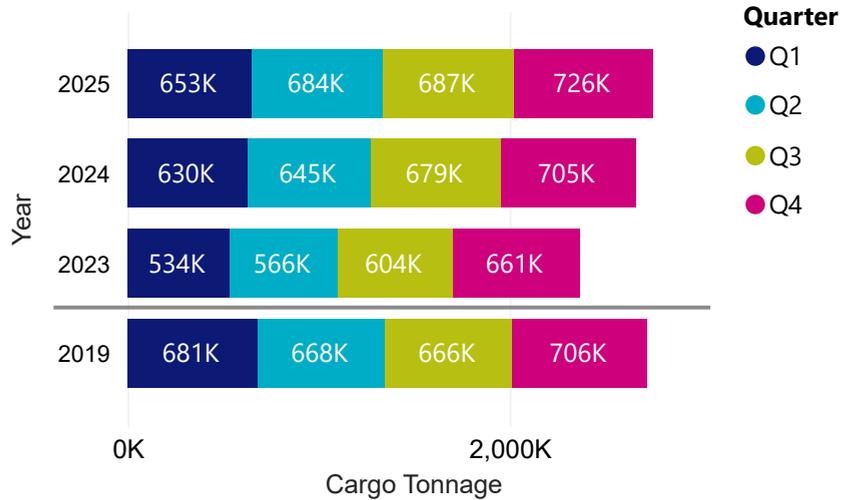
The charts on this page show how cargo tonnage growth is distributed across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

Cargo Tonnage

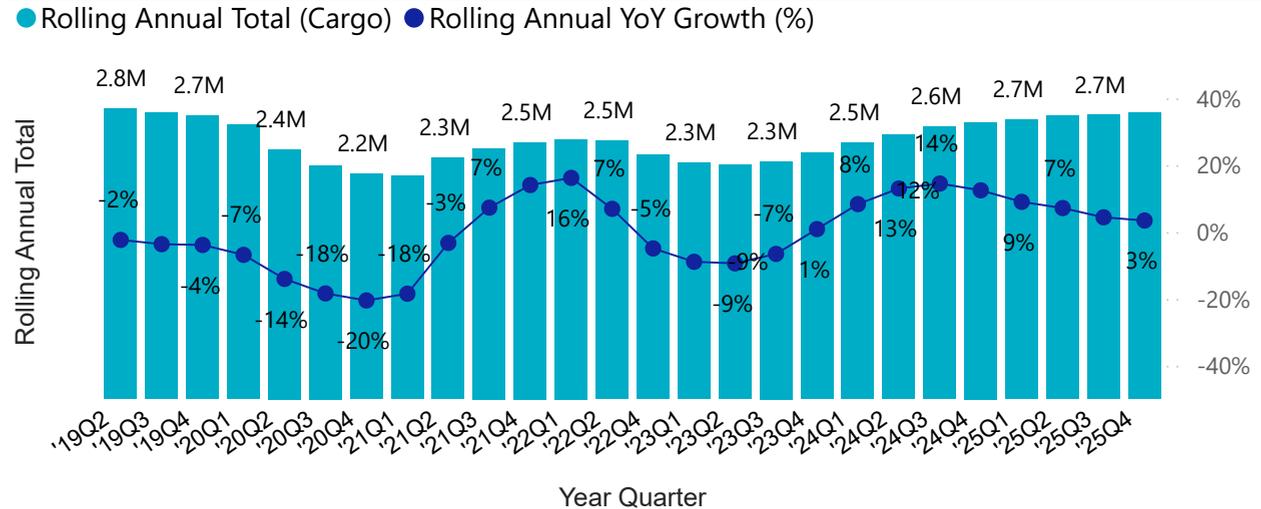
5 Year Trend



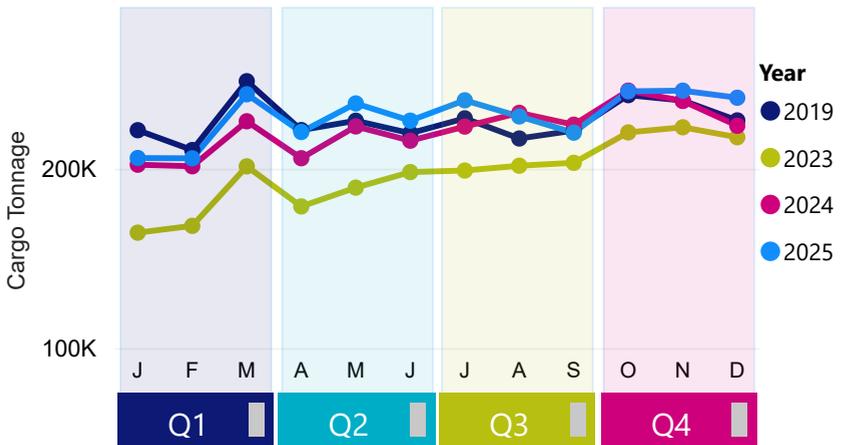
Quarterly



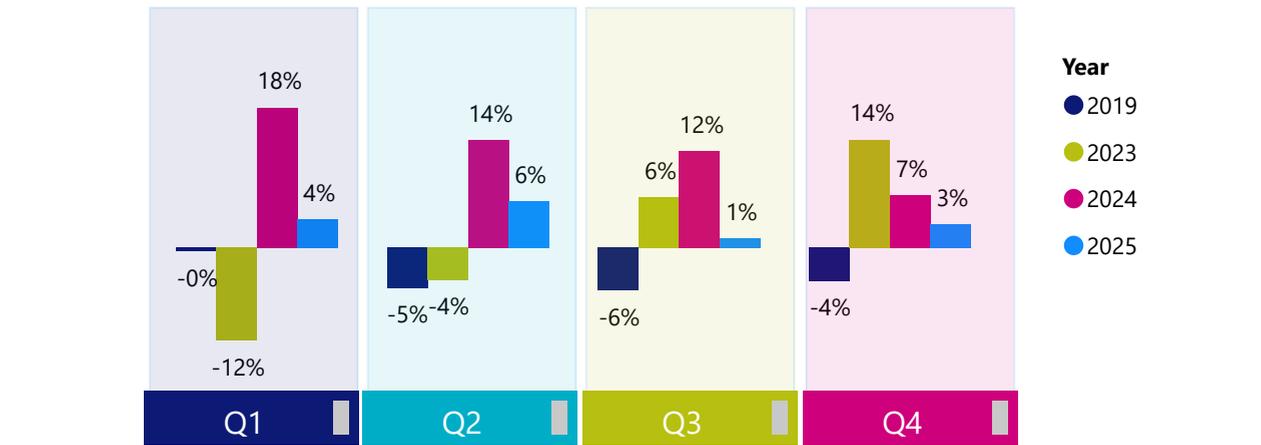
Rolling 12-month total



Monthly



Year-on-year % Variance



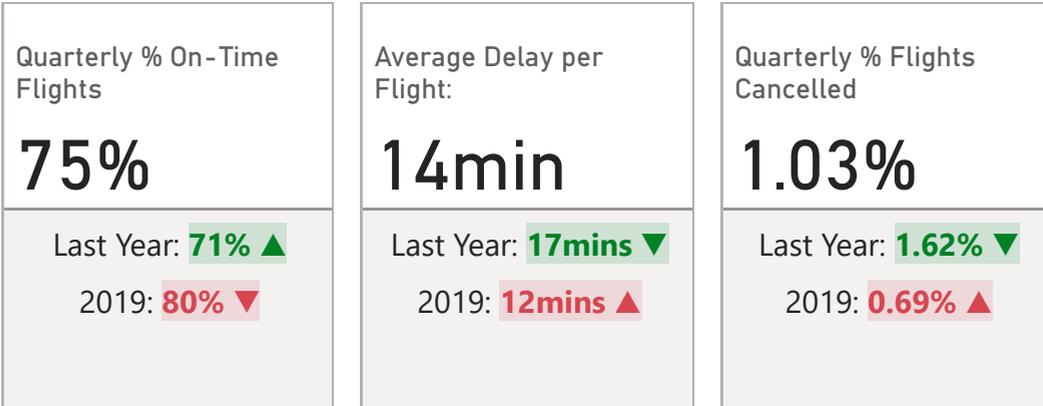
Punctuality Trends - Q4 2025

vs Last Year & 2019

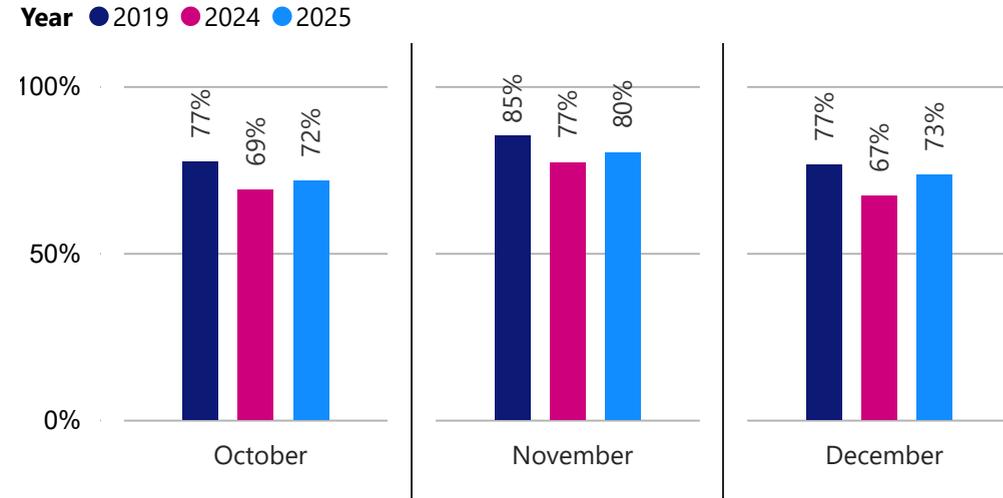
NB: Delays can occur for multiple reasons - many of which are out of the control of industry operators



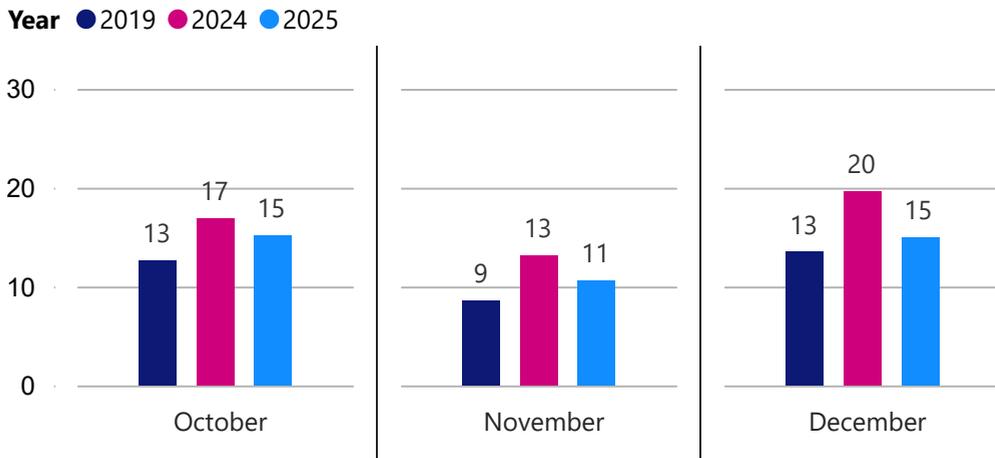
Quarterly Results



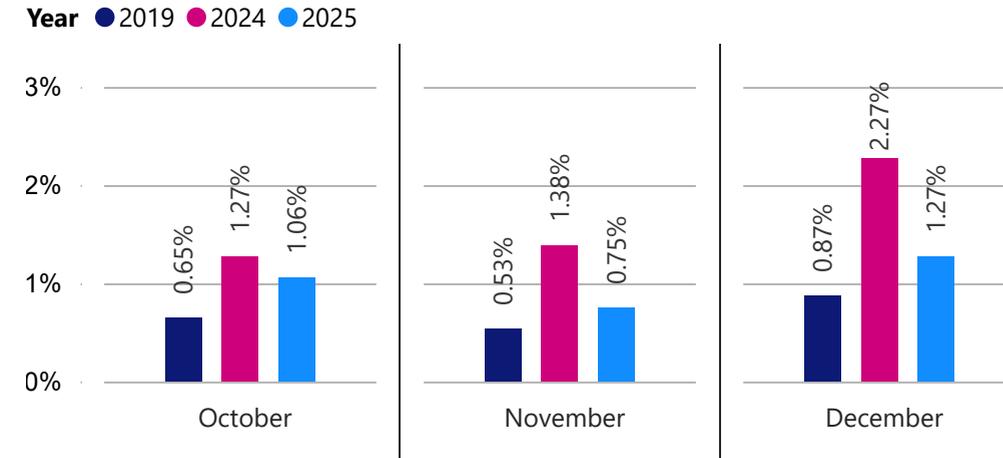
% On-Time Flights (within 15mins of schedule)



Average Delay per Flight (mins)



% Flights Cancelled (inside 24hr before departure)

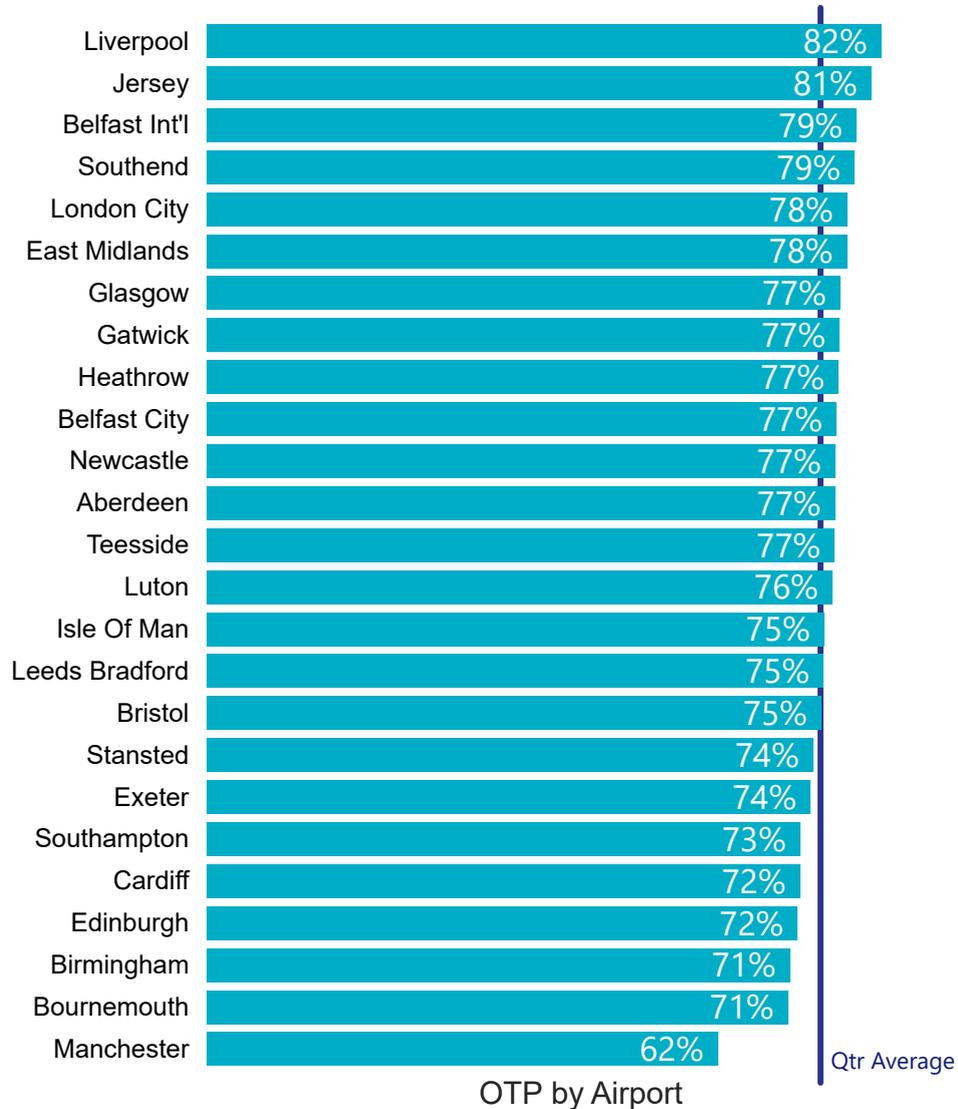


Flight Punctuality - Q4 2025 (UK Arrivals & Departures)

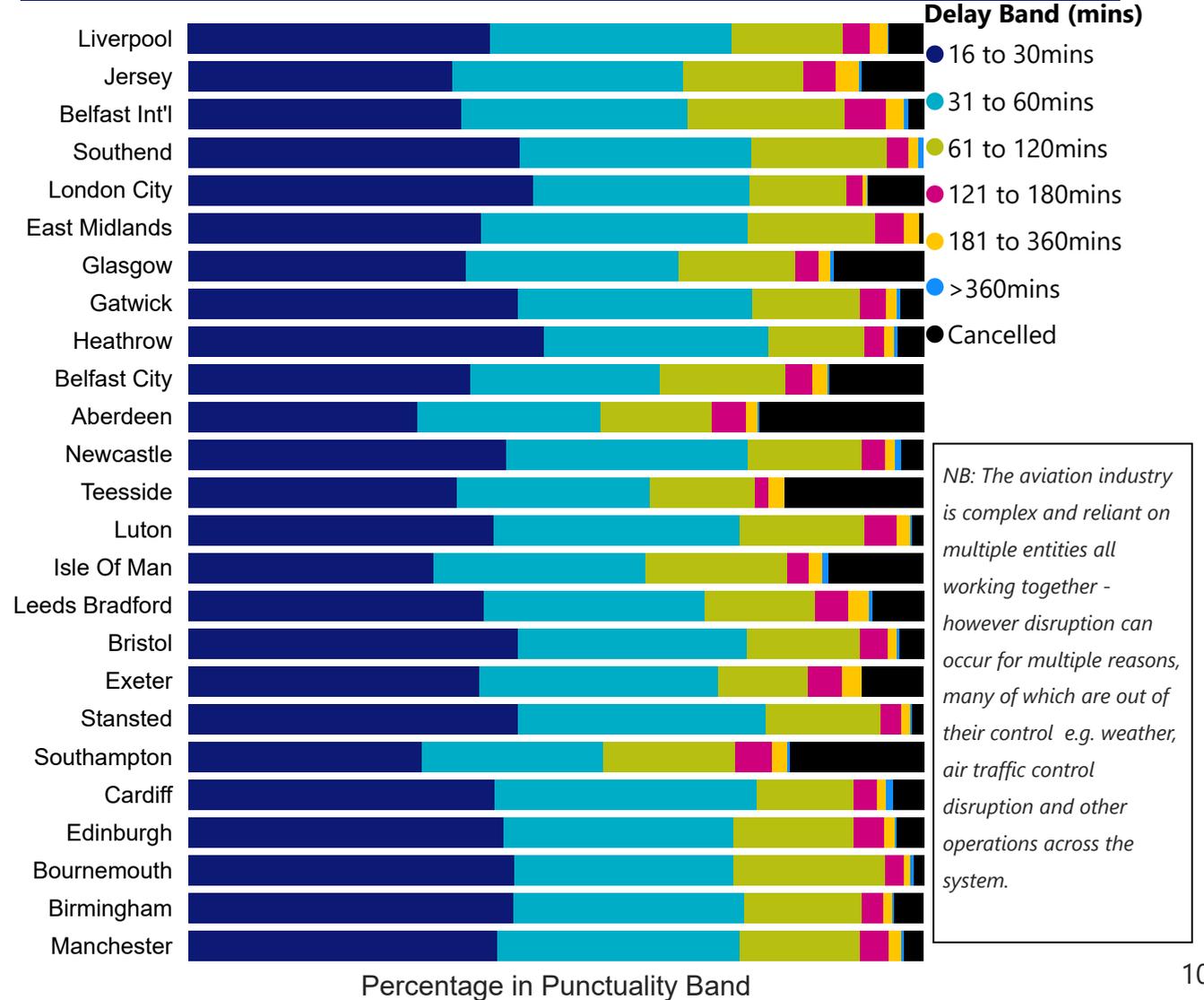
CAA (UK) reporting airports



Percentage of flights on time (<15mins)

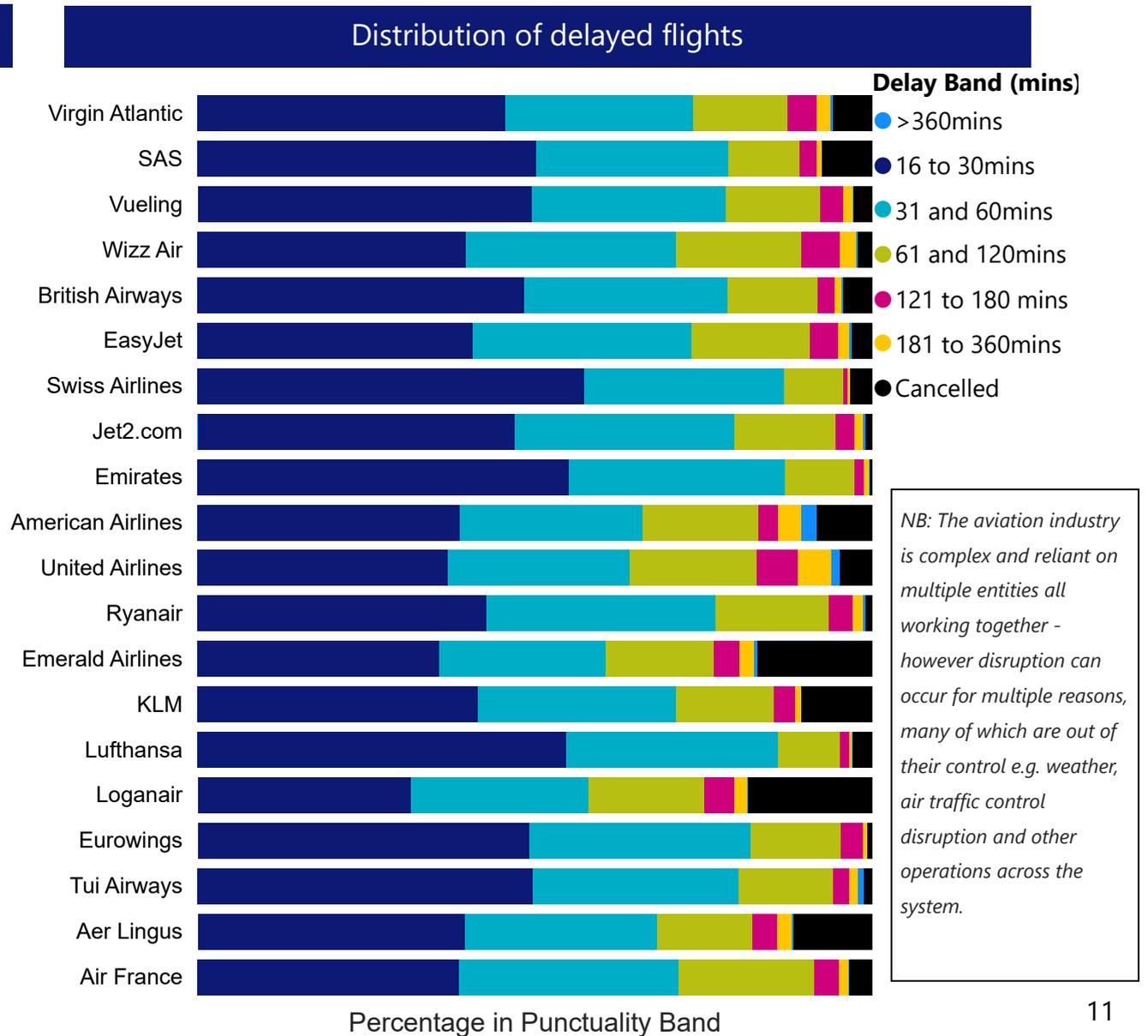
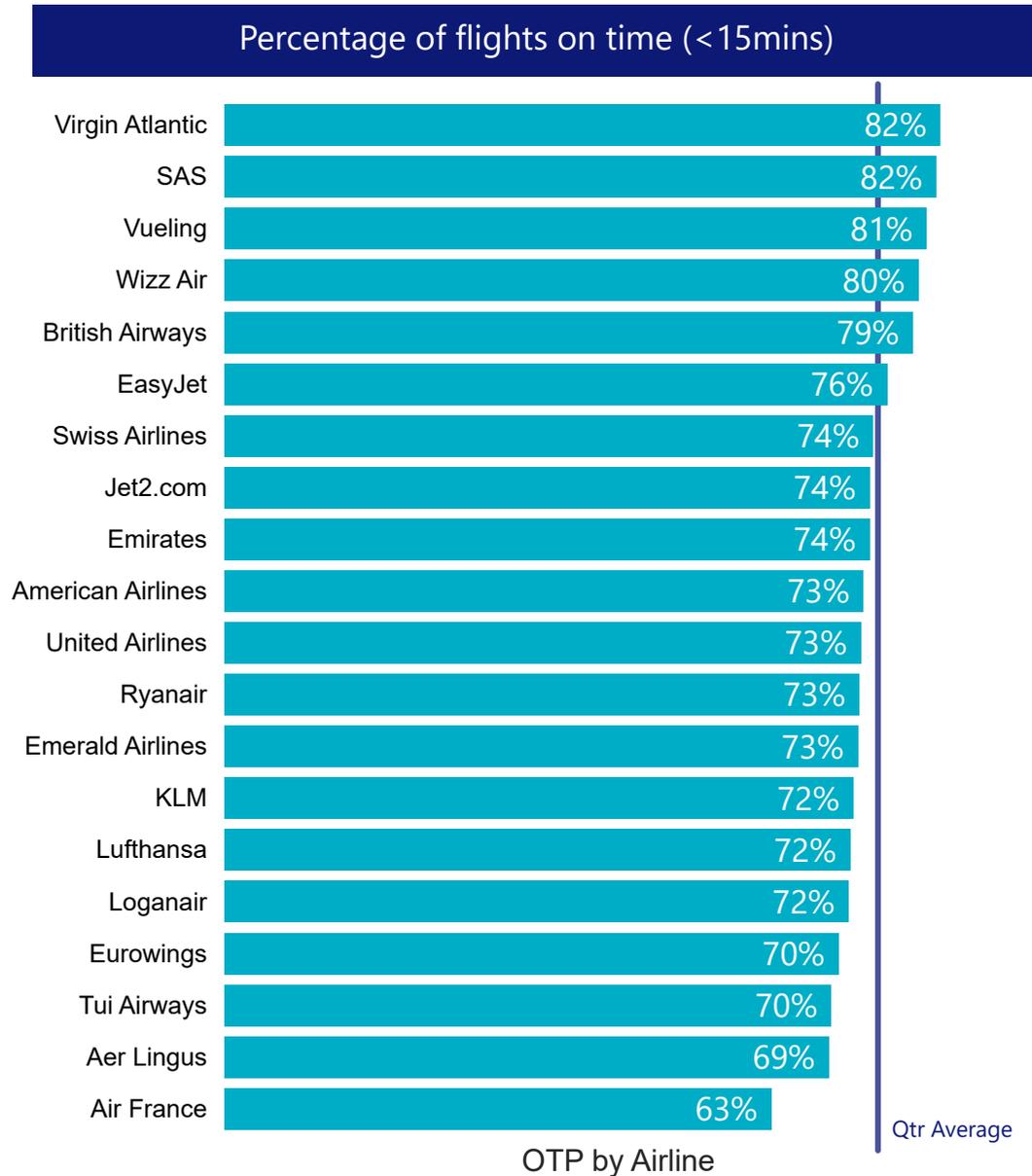


Distribution of delayed flights



Flight Punctuality - Q4 2025 (UK Arrivals & Departures)

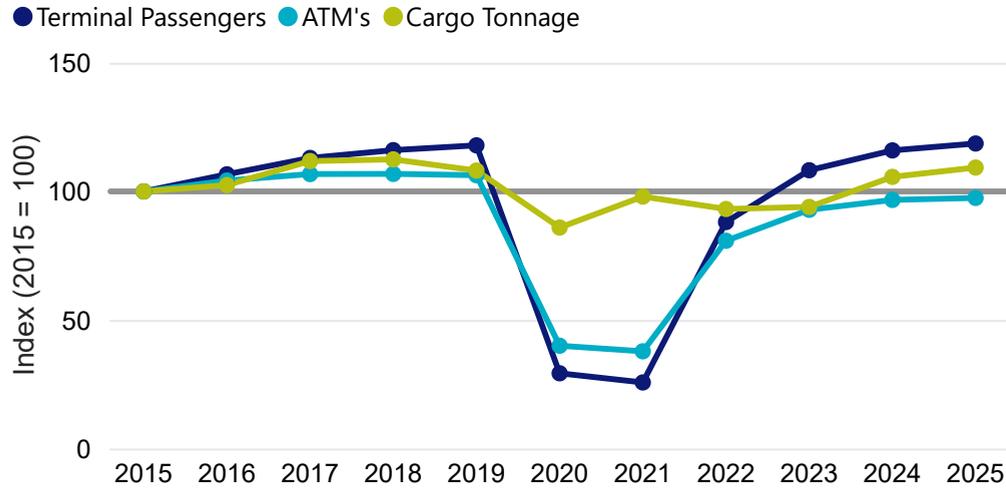
Top 20 largest airlines by ATM's



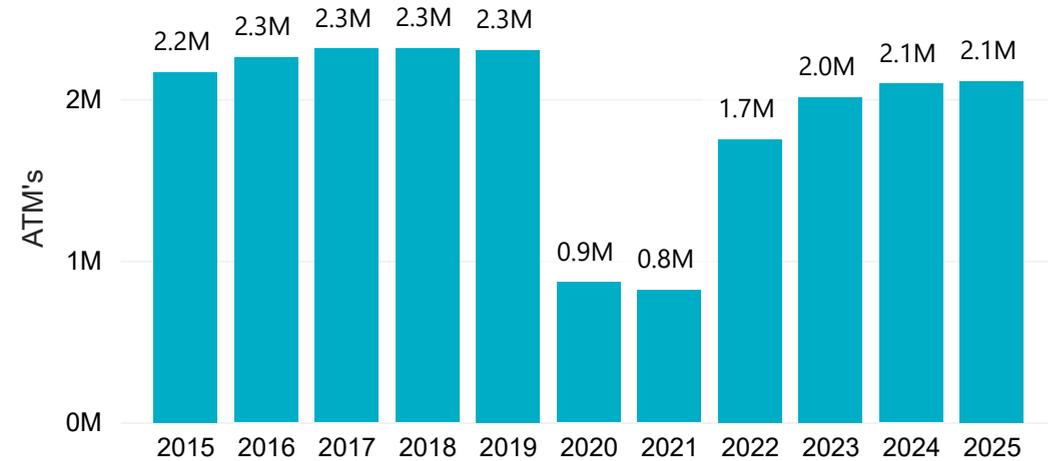
10 year trends

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

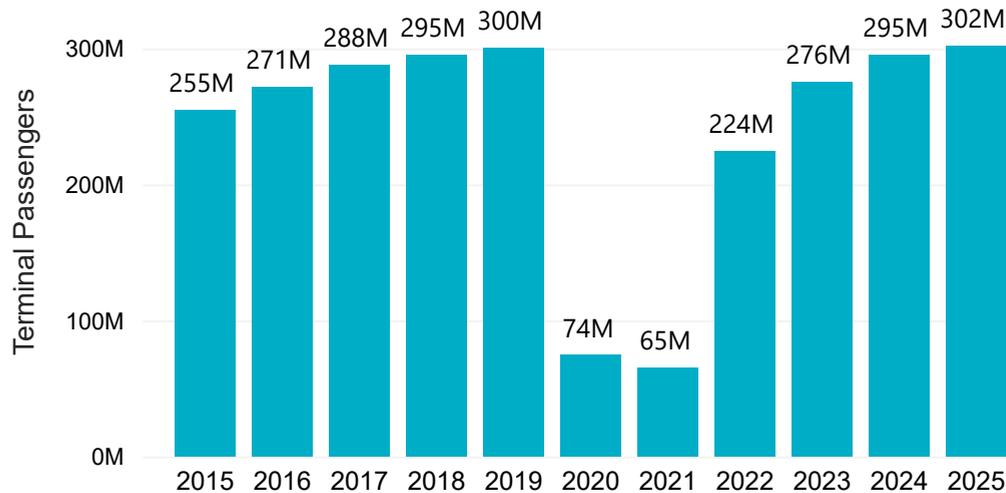
Indexed passenger, ATM and cargo growth (2015 = 100)



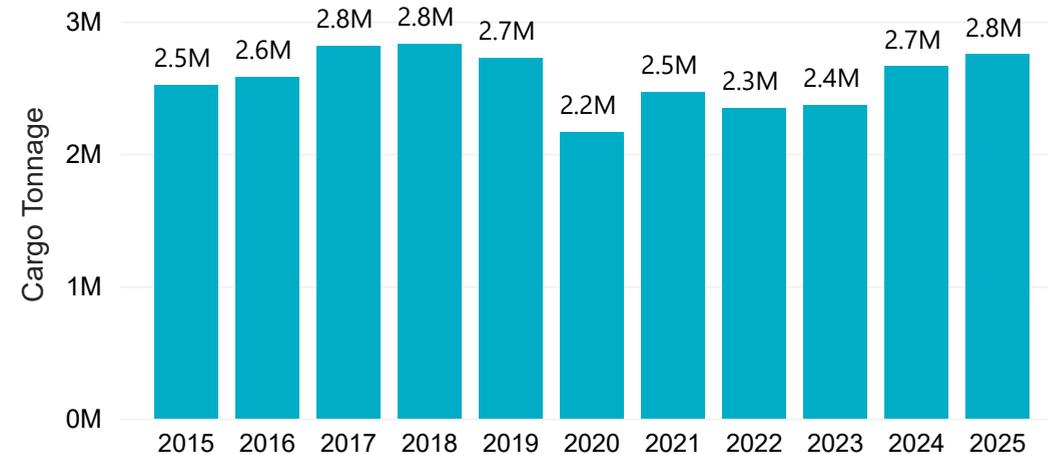
ATM's (millions)



Terminal passengers (millions)



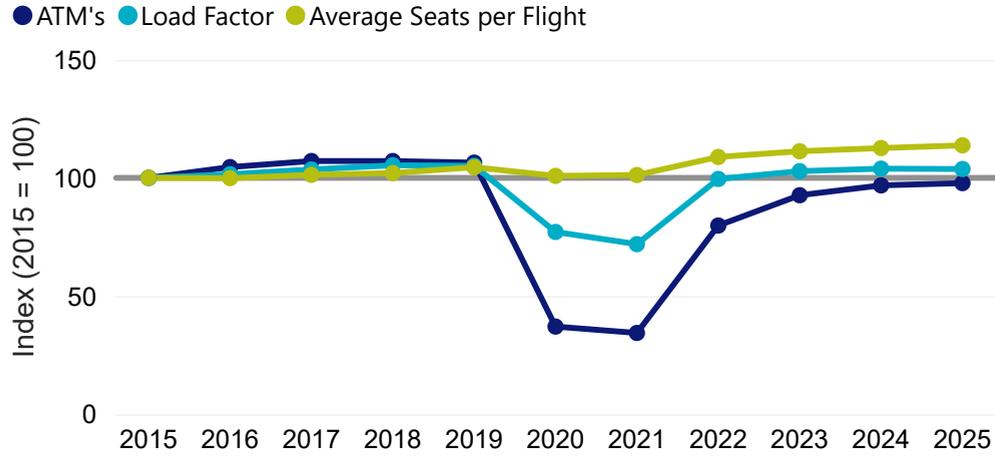
Cargo tonnage (millions)



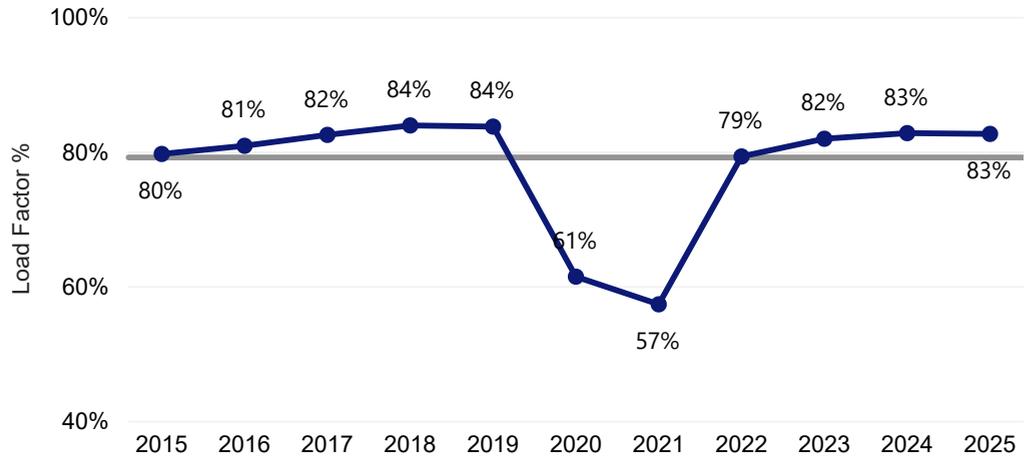
10 Year trends

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

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

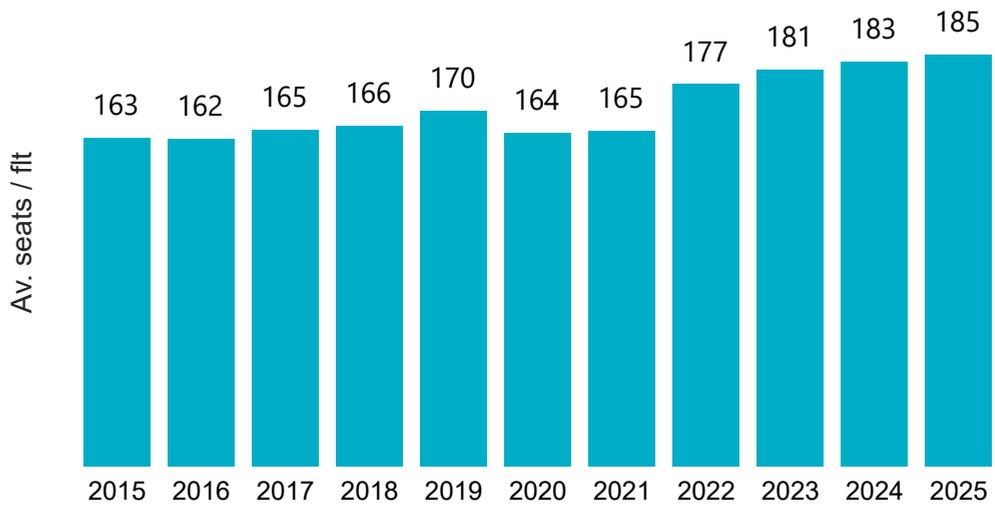


Average load factor (%)



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

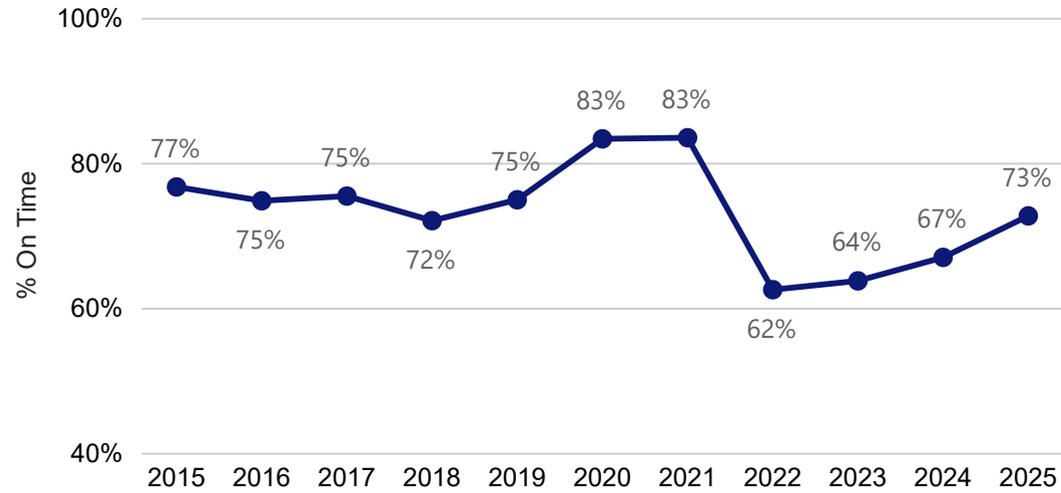
Average seats per flight



10 Year trends

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

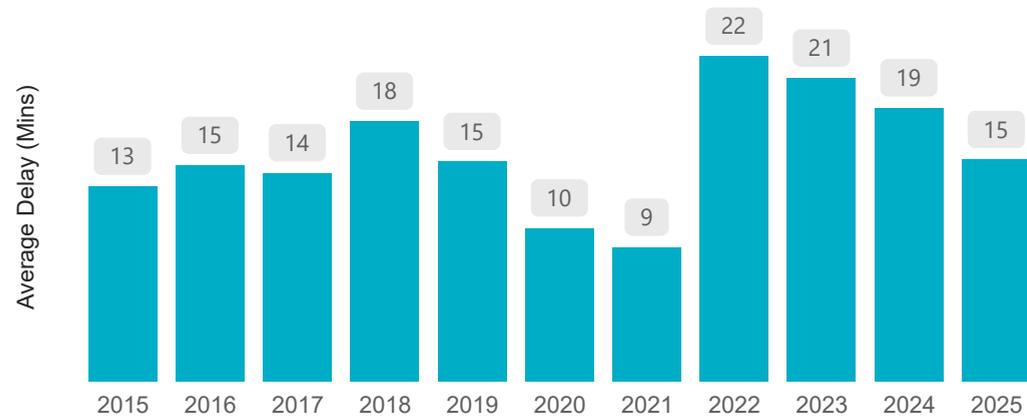
% On-time performance (OTP) <15mins



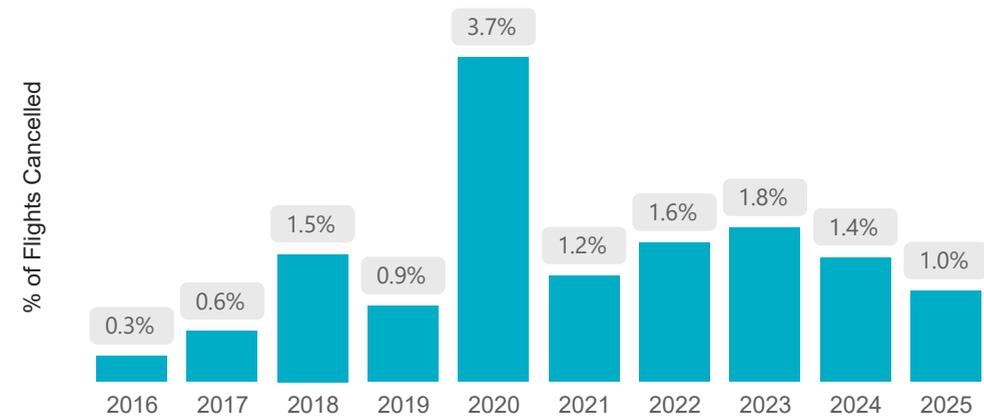
% OTP by month (last five years)



Average delay minutes per flight



% of flights cancelled (within 24hr before departure)

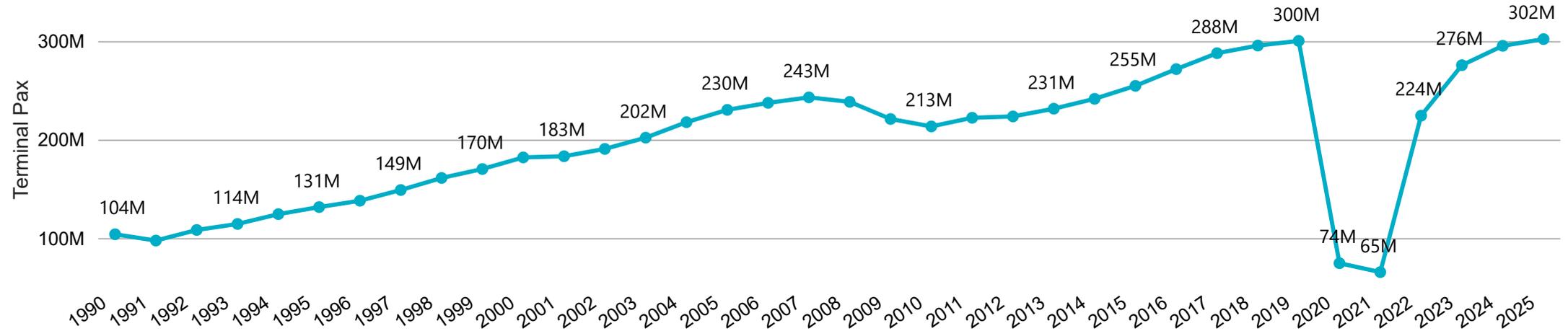


Trend since 1990 (30+ years)

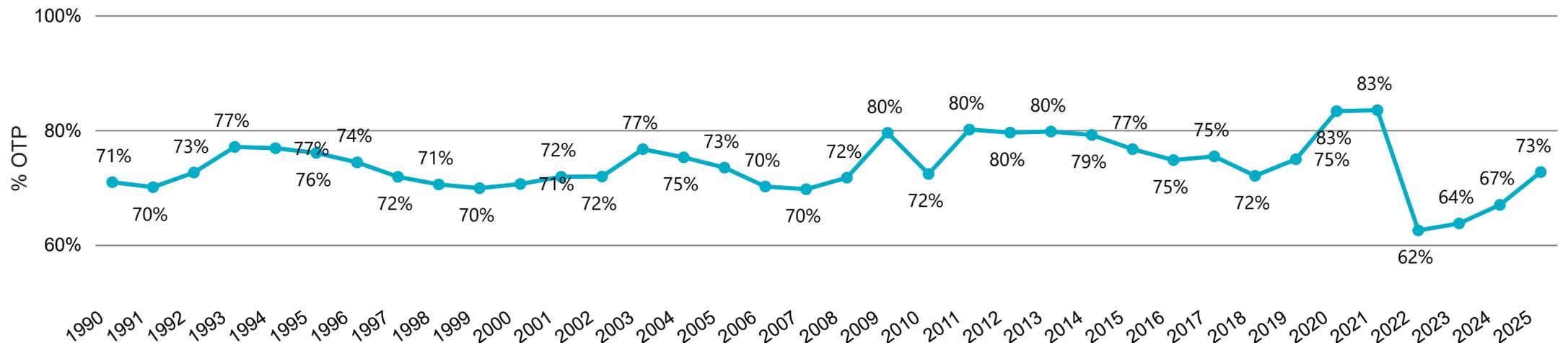
Terminal Passengers and % On-Time Performance



Annual UK Terminal Passengers (1990 - 2025)



On-Time Performance (within 15mins of schedule)

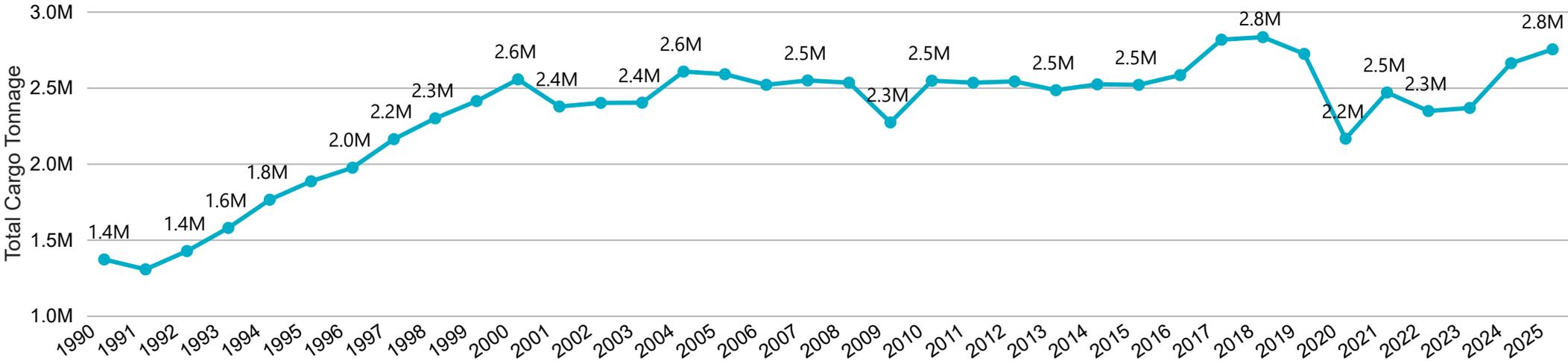


Trends since 1990 (30+ years)

Cargo Tonnage



Annual UK Cargo Tonnage (1990 - 2025)



Data Tables (Latest Quarter): *Terminal Passengers* - Q4 2025

Top 25 UK reporting airports		
Reporting Airport	Term. Passengers	% YoY
Heathrow	21,188,448	2% ▲
Gatwick	9,527,880	-2% ▼
Manchester	7,428,605	4% ▲
Stansted	7,030,749	1% ▲
Luton	4,160,728	5% ▲
Edinburgh	4,021,873	8% ▲
Birmingham	3,071,019	5% ▲
Bristol	2,369,262	4% ▲
Glasgow	1,917,120	2% ▲
Belfast Int'l	1,536,653	-2% ▼
Liverpool	1,260,028	11% ▲
Newcastle	1,224,165	9% ▲
London City	935,276	1% ▲
Leeds Bradford	887,245	0% ▲
East Midlands	728,473	2% ▲
Belfast City	596,748	2% ▲
Aberdeen	559,523	0% ▲
Jersey	331,652	4% ▲
Bournemouth	253,470	28% ▲
Southampton	206,547	2% ▲
Cardiff	192,301	21% ▲
Southend	189,871	212% ▲
Inverness	189,147	6% ▲
Guernsey	162,158	5% ▲
Isle Of Man	154,285	1% ▲
Total	70,123,226	3% ▲

Top 25 Airlines		
Airline (groups)	Term. Passengers	% YoY
EasyJet	14,388,654	5% ▲
Ryanair	13,228,625	4% ▲
British Airways	13,070,248	2% ▲
Jet2.com	3,976,333	3% ▲
Wizz Air	2,672,515	-4% ▼
Tui Airways	1,947,160	-4% ▼
Virgin Atlantic	1,472,015	2% ▲
Emirates	1,469,969	3% ▲
KLM	1,174,535	2% ▲
Aer Lingus	1,149,280	-3% ▼
Qatar Airways	911,491	10% ▲
American Airlines	849,396	-5% ▼
Lufthansa	824,222	-2% ▼
Vueling	778,278	-4% ▼
Loganair	661,277	4% ▲
United Airlines	610,490	4% ▲
Turkish Airlines	551,645	12% ▲
SAS	420,921	-1% ▼
Delta Airlines	415,886	4% ▲
Air Canada	410,696	7% ▲
Swiss Airlines	406,790	1% ▲
Etihad Airways	395,192	21% ▲
Pegasus Airlines	380,486	17% ▲
Air India	378,421	-2% ▼
Air France	369,478	3% ▲
Total	62,914,003	3% ▲

Top 25 international destinations		
OD Airport Name	Term. Passengers	% YoY
Dublin	2,566,124	8% ▲
Amsterdam	2,217,235	1% ▲
Dubai	1,665,699	4% ▲
Alicante	1,448,226	6% ▲
Tenerife (Surreina Sofia)	1,429,229	-0% ▼
Malaga	1,288,065	8% ▲
Paris (Charles De Gaulle)	1,243,504	5% ▲
Barcelona	1,075,650	-2% ▼
Doha Hamad	978,209	11% ▲
New York (Jf Kennedy)	942,785	-9% ▼
Madrid	918,915	8% ▲
Arrecife	867,757	0% ▲
Faro	799,322	2% ▲
Palma De Mallorca	781,743	1% ▲
Copenhagen	751,892	3% ▲
Krakow	732,254	16% ▲
Istanbul	729,685	5% ▲
Lisbon	714,278	-2% ▼
Berlin Brandenburg	702,608	9% ▲
Geneva	702,203	2% ▲
Frankfurt Main	663,435	-2% ▼
Antalya	632,085	-4% ▼
Prague	604,265	-5% ▼
Budapest	591,491	3% ▲
Zurich	589,651	8% ▲

Data Tables (Latest Quarter): *ATM's* - Q4 2025



Top 25 UK Reporting Airports			
Reporting Airport	ATM's	% YoY	
Heathrow	120,862	1%	▲
Gatwick	59,672	-4%	▼
Manchester	47,057	4%	▲
Stansted	45,287	-0%	▼
Edinburgh	28,399	3%	▲
Luton	24,934	3%	▲
Birmingham	21,886	6%	▲
Bristol	16,641	6%	▲
Glasgow	16,625	2%	▲
Aberdeen	13,420	-8%	▼
London City	12,147	-0%	▼
Belfast Int'l	11,627	-3%	▼
East Midlands	9,514	1%	▲
Liverpool	9,084	10%	▲
Newcastle	9,051	6%	▲
Belfast City	7,078	-5%	▼
Leeds Bradford	6,799	0%	▲
Guernsey	4,158	-4%	▼
Southampton	4,054	0%	▲
Jersey	3,968	-1%	▼
Norwich	3,197	-5%	▼
Sumburgh	2,618	-16%	▼
Kirkwall	2,476	1%	▲
Isle Of Man	2,267	-1%	▼
Inverness	2,259	0%	▲
Total	485,080	1%	▲

Top 25 international destinations			
OD Airport Name	ATM's	% YoY	
Dublin	21,189	11%	▲
Amsterdam	19,912	0%	▲
Paris (Charles De Gaulle)	10,124	1%	▲
Alicante	9,298	8%	▲
Tenerife (Surreina Sofia)	8,530	-0%	▼
Malaga	8,279	8%	▲
Barcelona	7,222	-2%	▼
Frankfurt Main	6,145	-3%	▼
Madrid	5,838	10%	▲
Arrecife	5,509	2%	▲
Faro	5,377	3%	▲
Geneva	5,290	-1%	▼
Palma De Mallorca	5,241	4%	▲
Copenhagen	5,138	-3%	▼
Zurich	4,944	3%	▲
Lisbon	4,772	-0%	▼
Berlin Brandenburg	4,653	5%	▲
Istanbul	4,402	5%	▲
New York (Jf Kennedy)	4,396	-8%	▼
Krakov	4,355	17%	▲
Dubai	4,324	4%	▲
Antalya	4,041	-1%	▼
Prague	3,781	-7%	▼
Doha Hamad	3,719	16%	▲
Budapest	3,551	6%	▲

ATM's by operation type			
Op. Type	ATM's	% YoY	
Scheduled	479,167	2%	▲
Charter	23,425	-11%	▼

ATM's by market			
Market	ATM's	% YoY	
W. Europe	281,024	2%	▲
Domestic	108,548	-4%	▼
RoW	47,986	11%	▲
E. Europe	35,709	-0%	▼
N. America	29,333	-2%	▼

Data Tables (Latest Quarter): *Cargo Tonnage - Q4 2025*



Cargo Tonnage by UK reporting airport		
Reporting Airport	Cargo Tonnage	% YoY
Heathrow	417,579	-2% ▼
East Midlands	108,294	21% ▲
Stansted	74,973	-2% ▼
Gatwick	30,790	6% ▲
Manchester	25,720	11% ▲
Birmingham	15,420	-1% ▼
Prestwick	14,059	489% ▲
Bournemouth	13,372	54% ▲
Belfast Int'l	7,337	-26% ▼
Edinburgh	6,058	-9% ▼
Luton	5,088	-32% ▼
Glasgow	2,517	-7% ▼
Aberdeen	1,588	2% ▲
Newcastle	1,125	-25% ▼
Teesside	538	208% ▲
Guernsey	353	-44% ▼
Kirkwall	314	-10% ▼
Sumburgh	300	-24% ▼
Stornoway	252	9% ▲
Benbecula	204	23% ▲
Jersey	121	-3% ▼
Islay	76	7% ▲
Humberside	26	41% ▲
Bristol	22	1433% ▲
Alderney	18	-23% ▼
Total	726,145	3%

Top 25 international destinations		
OD Airport Name	Cargo Tonnage	% YoY
Doha Hamad	37,249	11% ▲
Dubai	36,604	4% ▲
New York (Jf Kennedy)	35,865	-8% ▼
Leipzig	31,518	11% ▲
Los Angeles International	20,222	0% ▲
Hong Kong (Chek Lap Kok)	16,030	18% ▲
Mumbai	15,334	21% ▲
Delhi	14,611	10% ▲
Shanghai (Pu Dong)	14,143	-7% ▼
Beijing	13,766	55% ▲
Guangzhou Baiyun International	13,691	31% ▲
Cologne Bonn	13,206	-8% ▼
Singapore	12,796	7% ▲
Chicago (O'Hare)	12,491	-5% ▼
Abu Dhabi International	12,354	11% ▲
Istanbul	11,031	-14% ▼
Paris (Charles De Gaulle)	11,011	1% ▲
Miami International	10,909	-2% ▼
Dallas/Fort Worth	10,602	13% ▲
Toronto	10,531	14% ▲
Brussels	10,266	-11% ▼
Cincinnati	9,914	9% ▲
Baku (Heyder Aliyev Int'L)	9,859	71% ▲
Riyadh	9,523	32% ▲
Tokyo (Haneda)	8,819	-1% ▼

Cargo Tonnage by operation type		
Op. Type	Cargo Tonnage	% YoY
Scheduled	696,461	5% ▲
Charter	29,731	-28% ▼

Cargo Tonnage by market		
Market	Cargo Tonnage	% YoY
RoW	358,673	10% ▲
N. America	221,506	-2% ▼
W. Europe	119,272	-2% ▼
Domestic	25,667	-13% ▼
E. Europe	1,067	-25% ▼