



# CAA Aviation Trends Quarter 1 2026

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## Trend since 1990 (30+ years)

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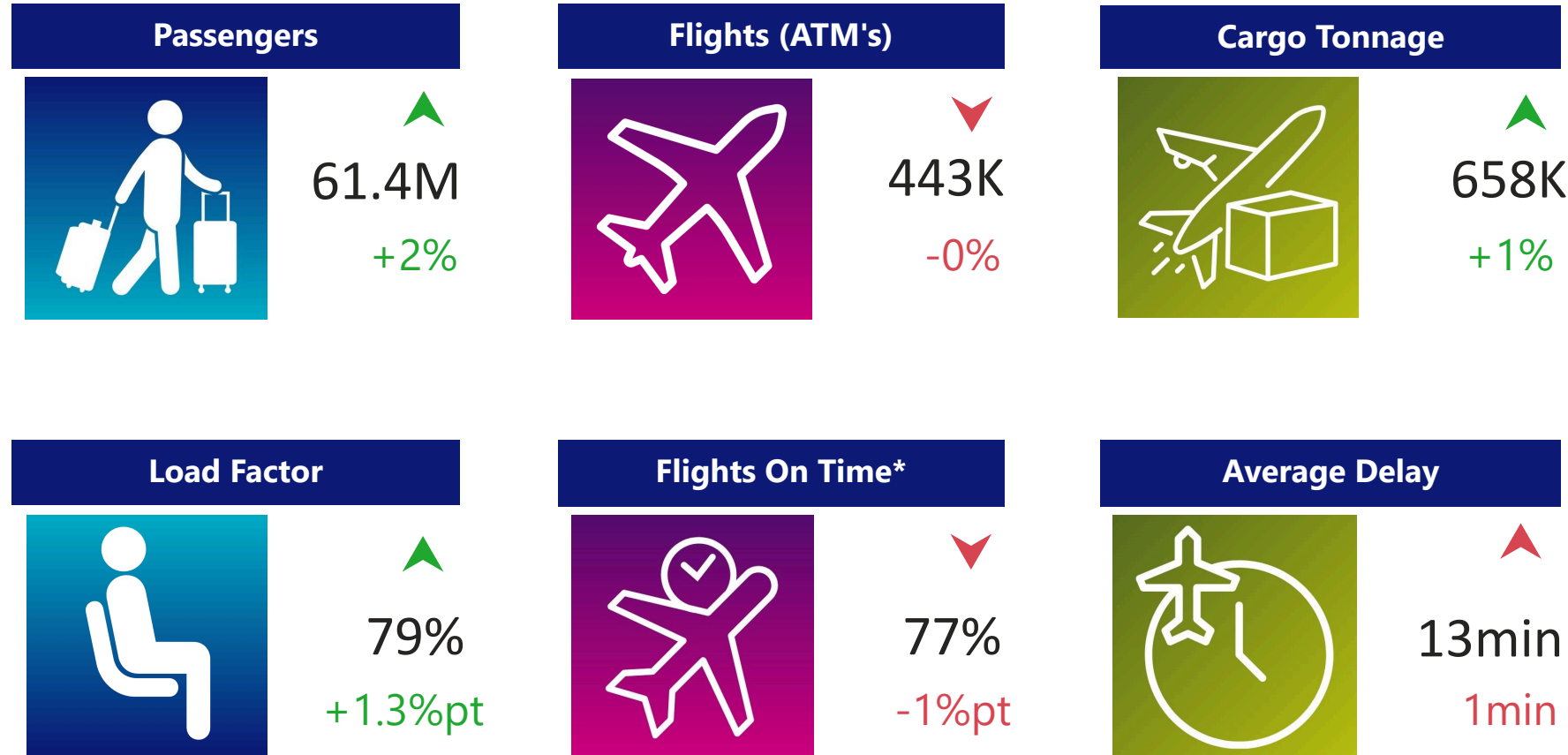
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## Report Notes

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 - Q1 2026 (vs 2025)



The figures on the left show the number of passengers, air transport movements (ATMs) and cargo volumes for the quarter. The load factor (the percentage of seats occupied on flights) and punctuality metrics are also displayed.

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

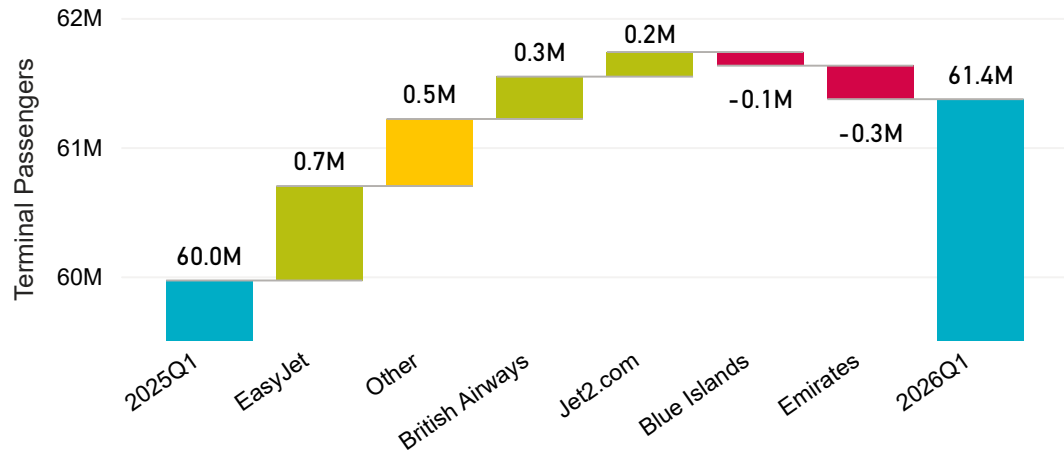
\* A flight is considered "on time" if it arrives or departs the gate within 15 minutes of the scheduled time.

# Terminal passengers Q1 2026

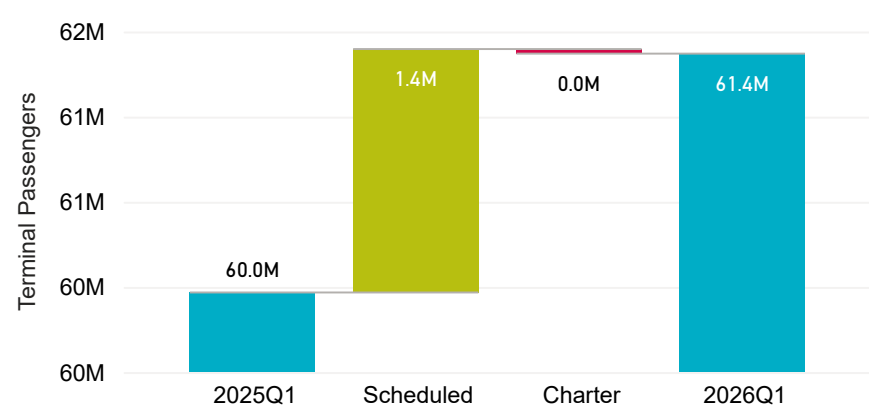
Year-on-year comparison



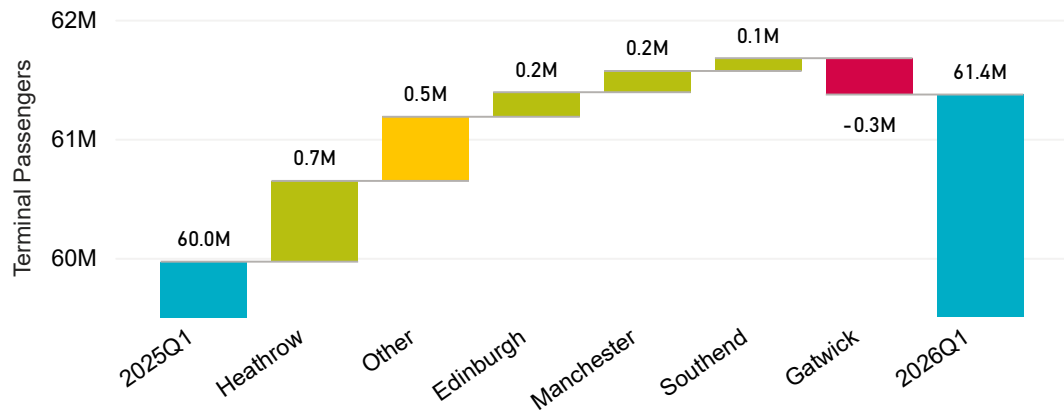
Terminal passengers by airline



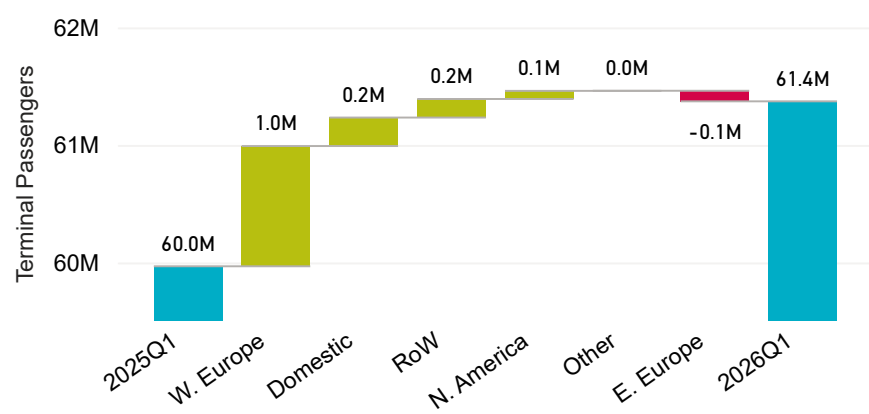
Terminal passengers by scheduled & charter services



Terminal passengers by reporting airport



Terminal passengers by market



The number of terminal passengers in Q1 was 61.4M up from 60.0M in the same period last year.

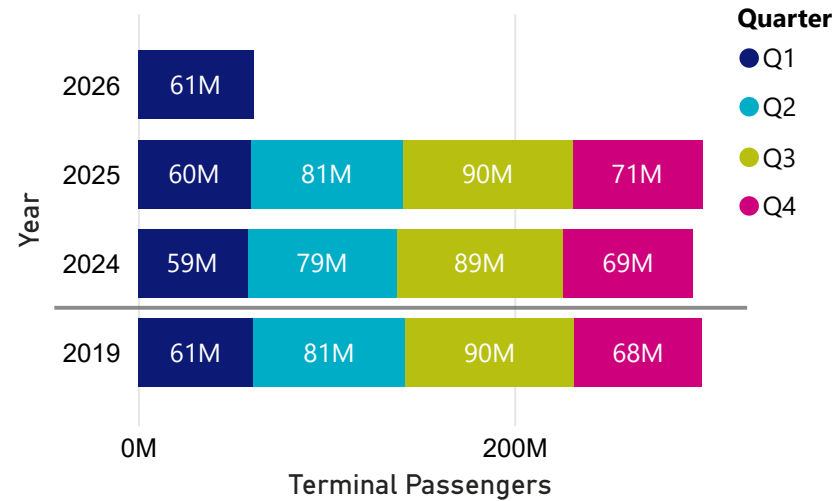
The charts on this page show the distribution of passenger growth across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

# Terminal passengers

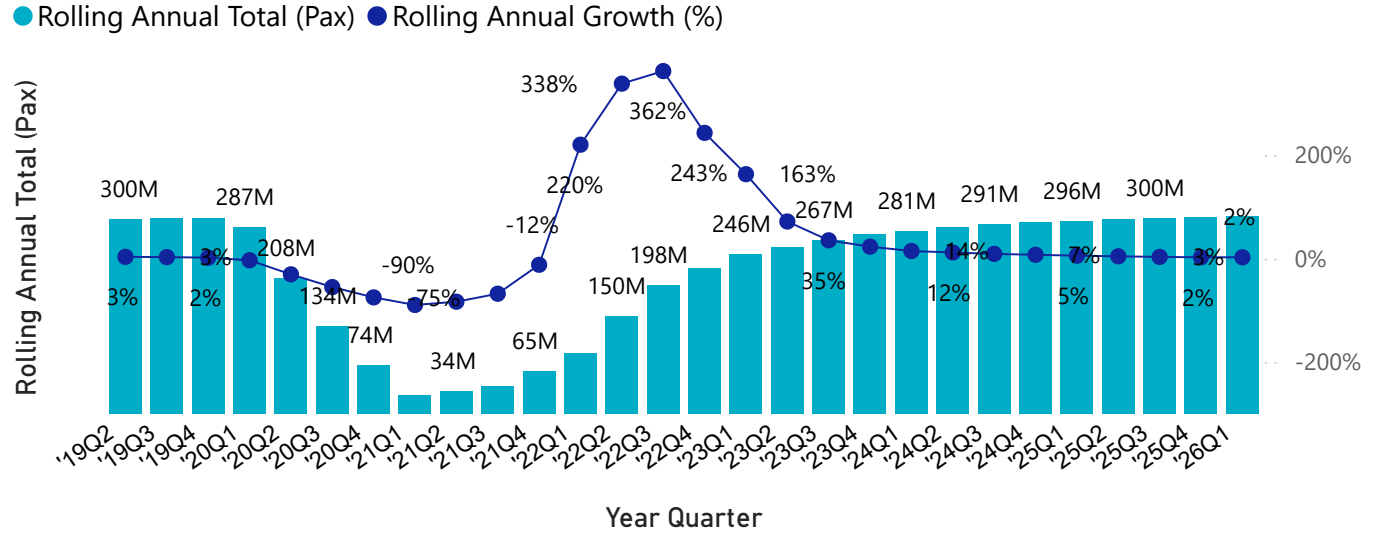
5 Year Trend



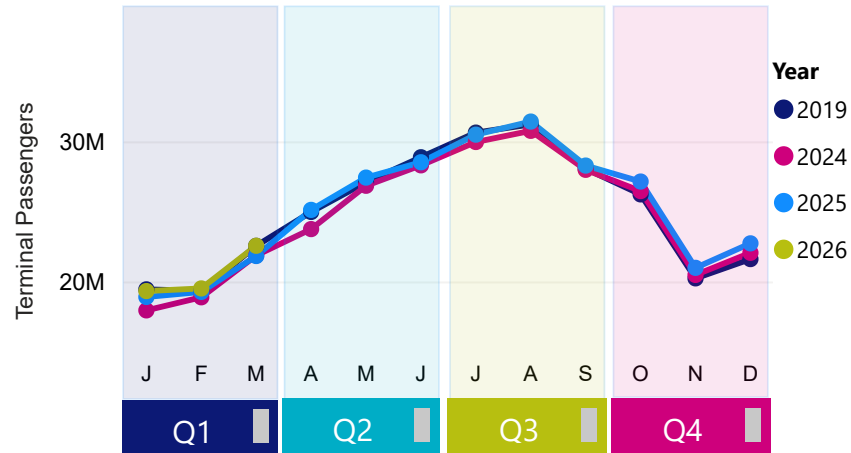
## Quarterly



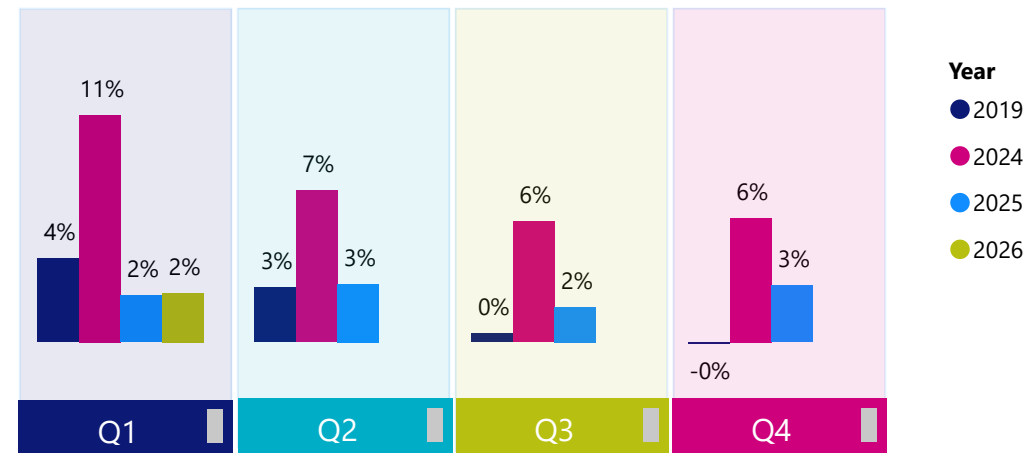
## Rolling 12-month total



## Monthly



## Year-on-year % Variance

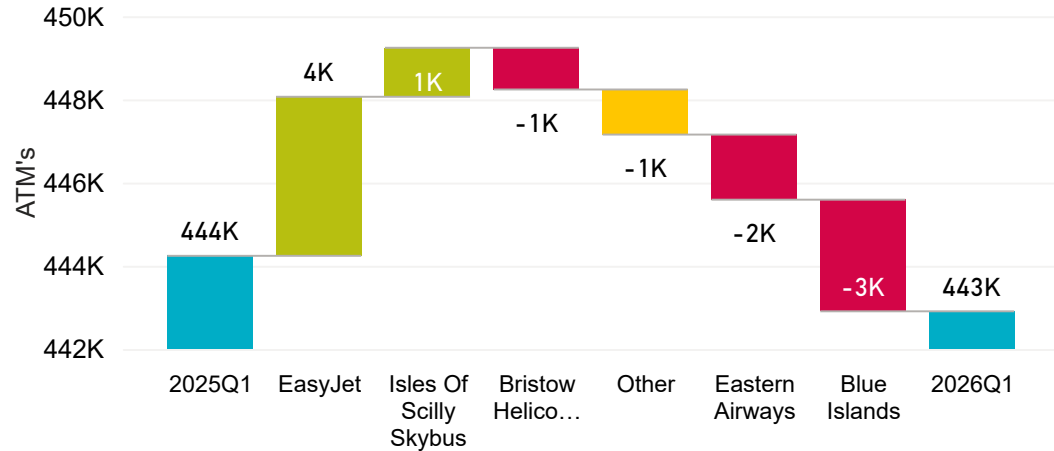


# Air Transport Movements (ATM's) - Q1 2026

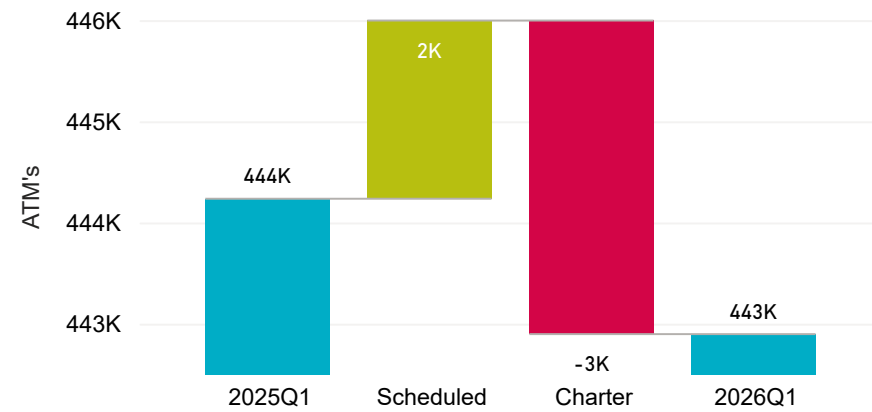
Year-on-year comparison



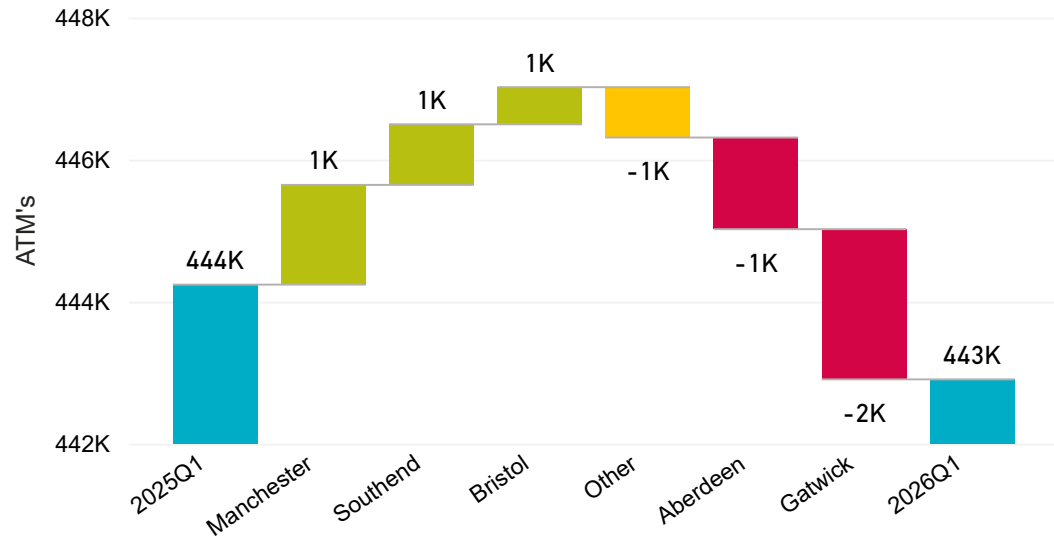
### ATM's by airline



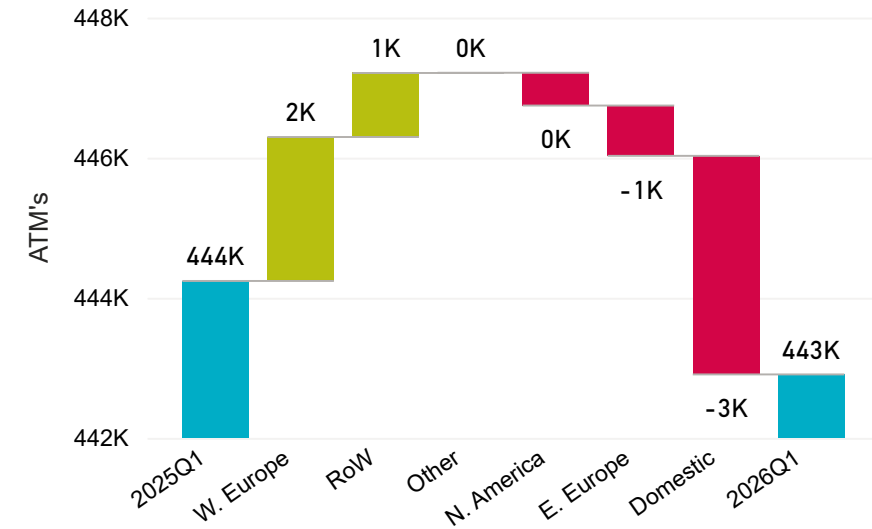
### ATM's by scheduled & charter operation



### ATM's by reporting airport



### ATM's by market

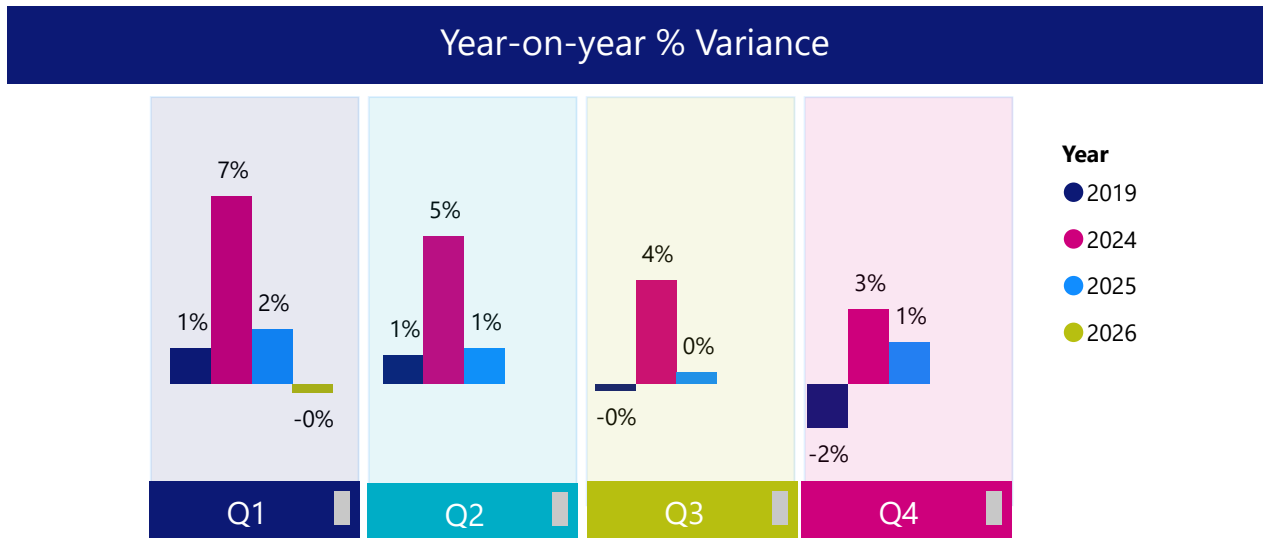
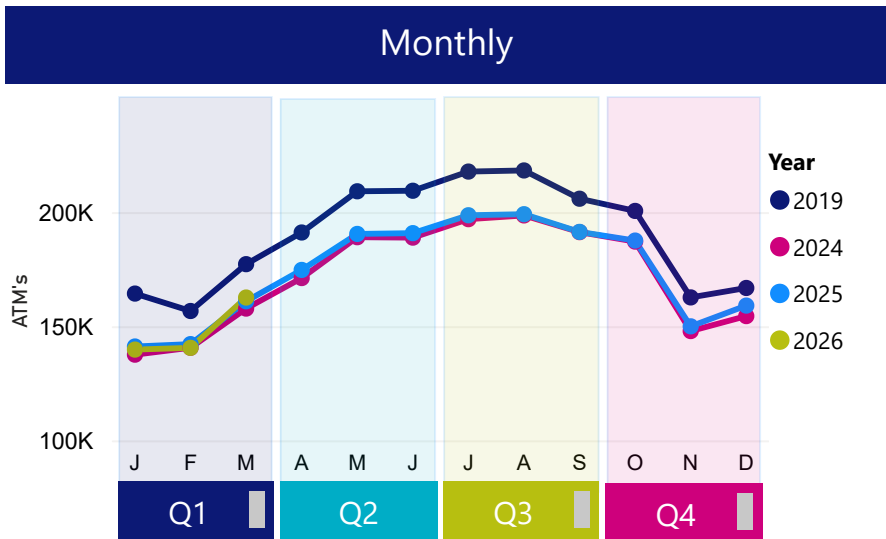
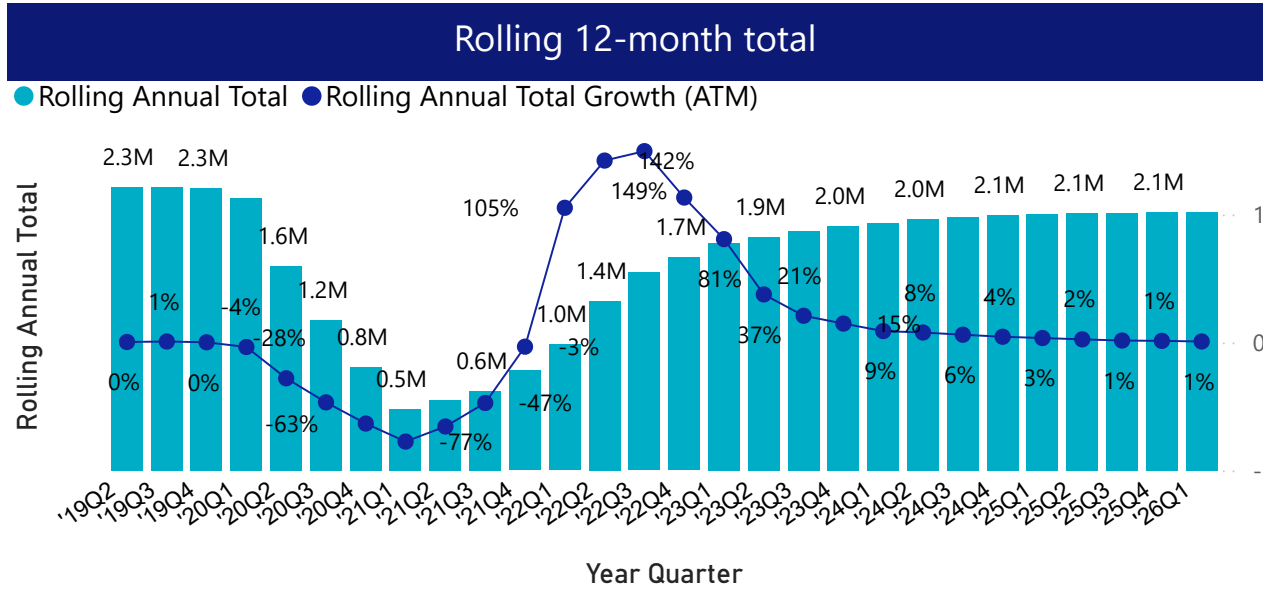
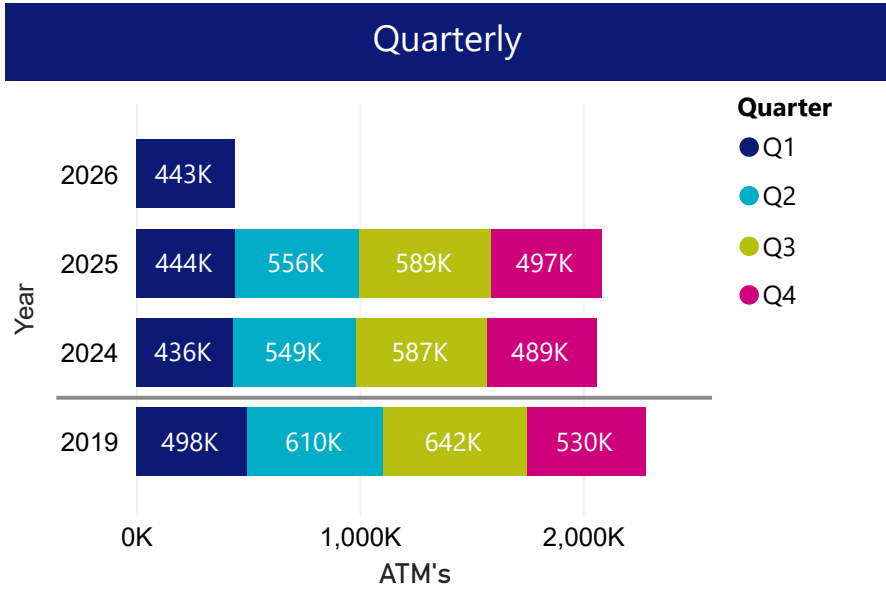


The number of ATM's in Q1 was 443K, slightly down on the same period last year.

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

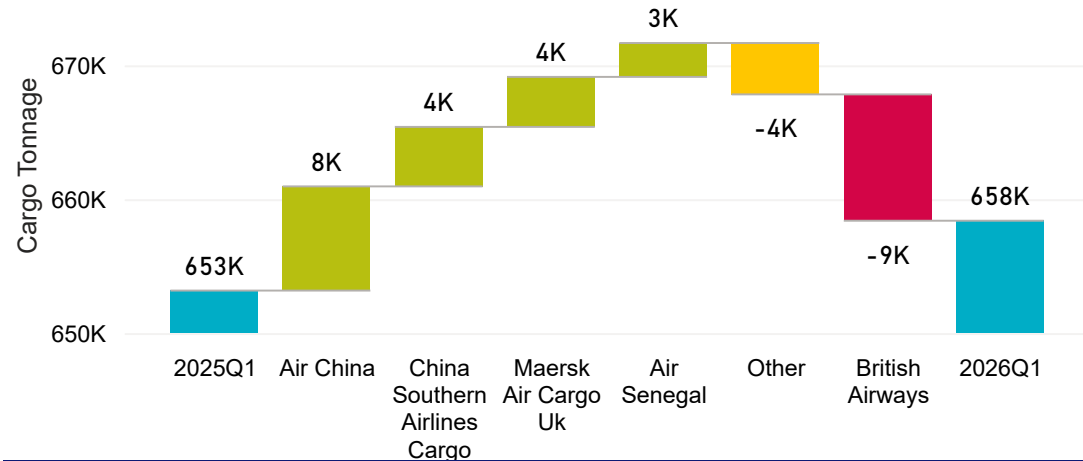


# Cargo Tonnage - Q1 2026

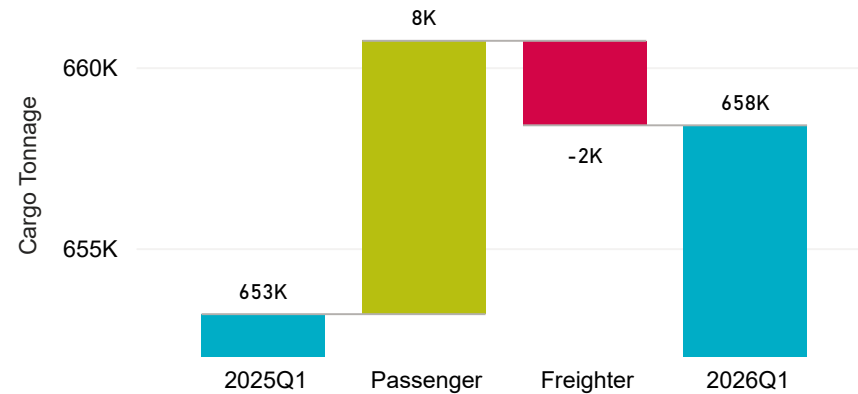
Year-on-year comparison



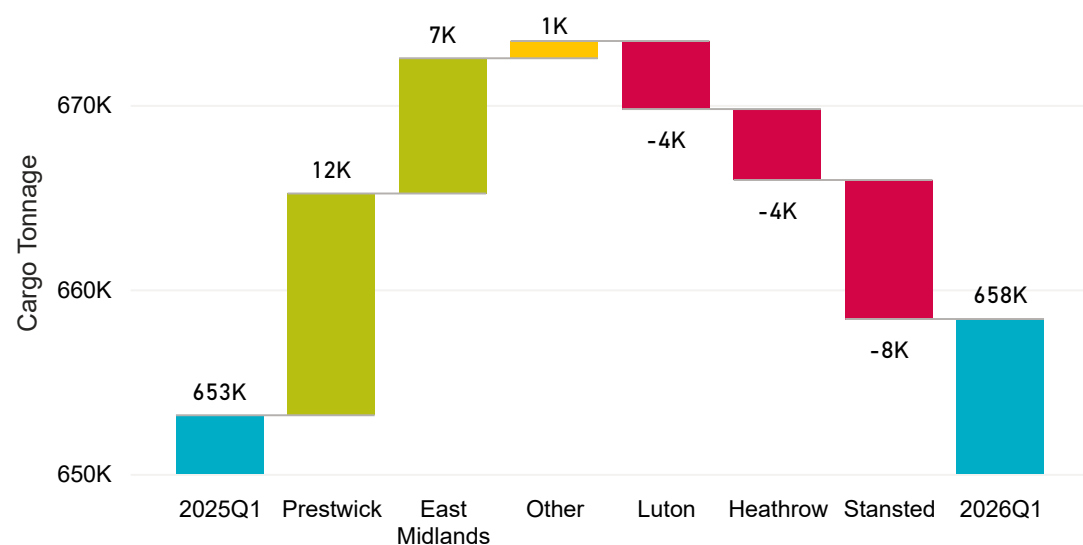
## Cargo tonnage by airline



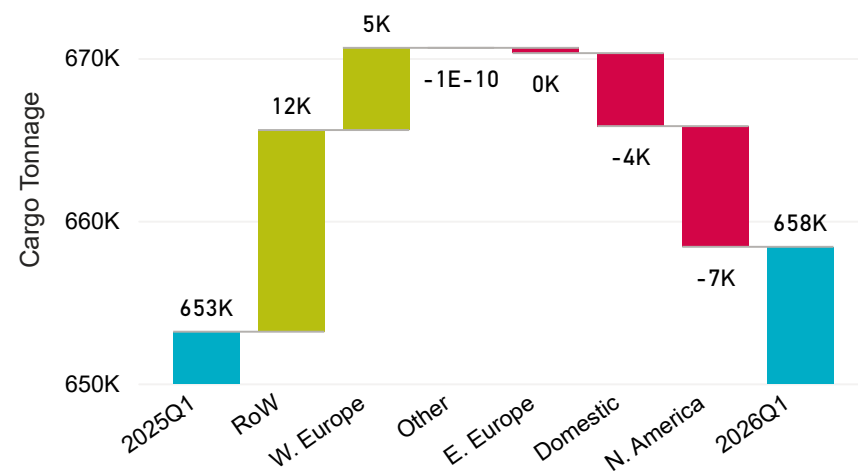
## Cargo tonnage by passenger & freighter services



## Cargo tonnage by reporting airport



## Cargo tonnage by market



Cargo Tonnage in Q1 was 658K up from 653K in the same period last year.

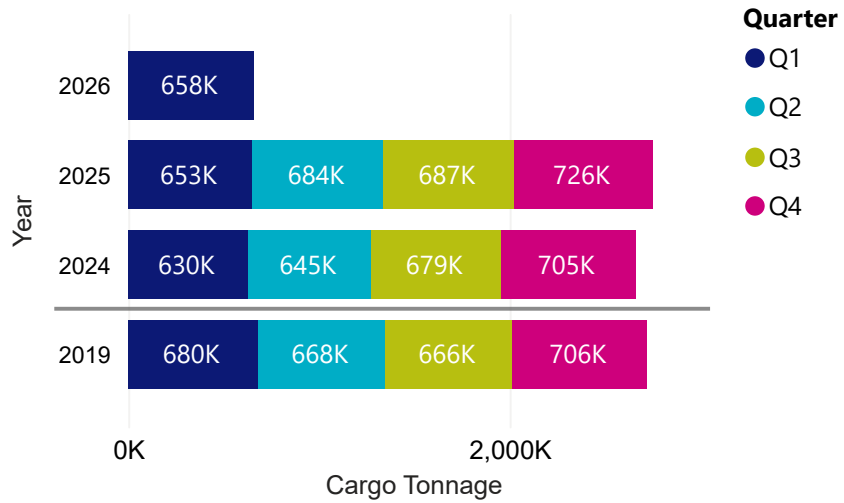
The charts on this page show how cargo tonnage growth is distributed across UK airports, airlines, operation type and market. The top 5 contributors are displayed for airports and airlines with the remainder grouped as "Other".

# Cargo Tonnage

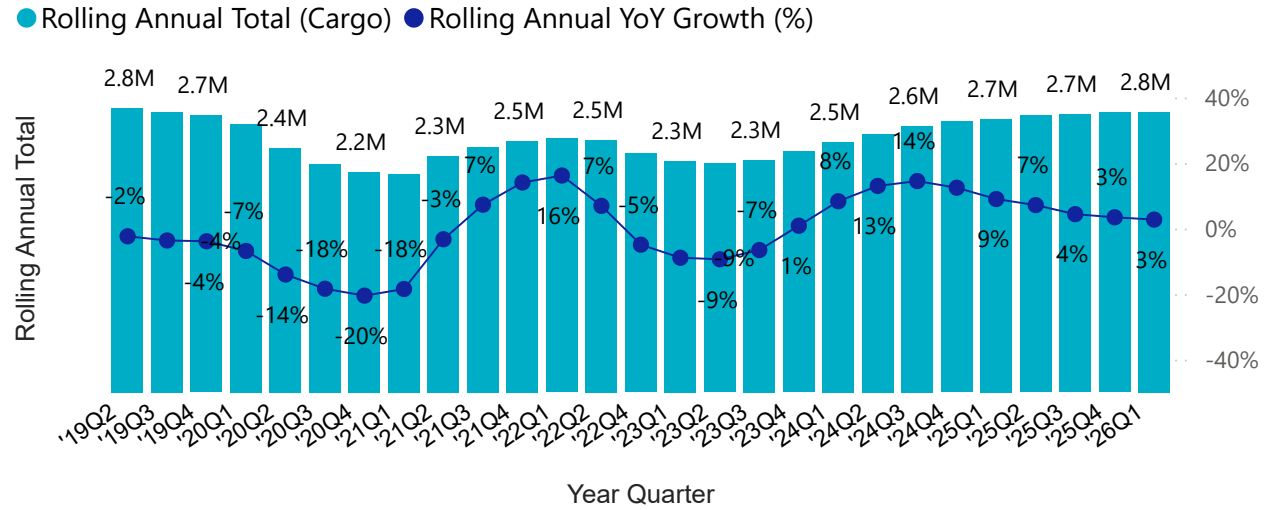
5 Year Trend



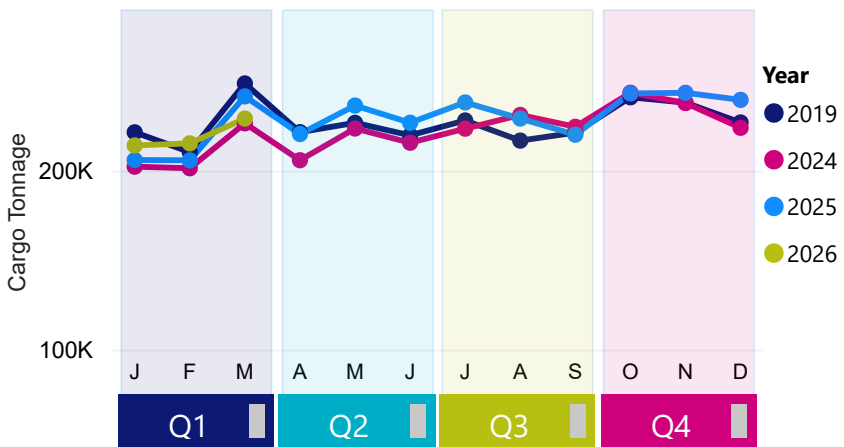
## Quarterly



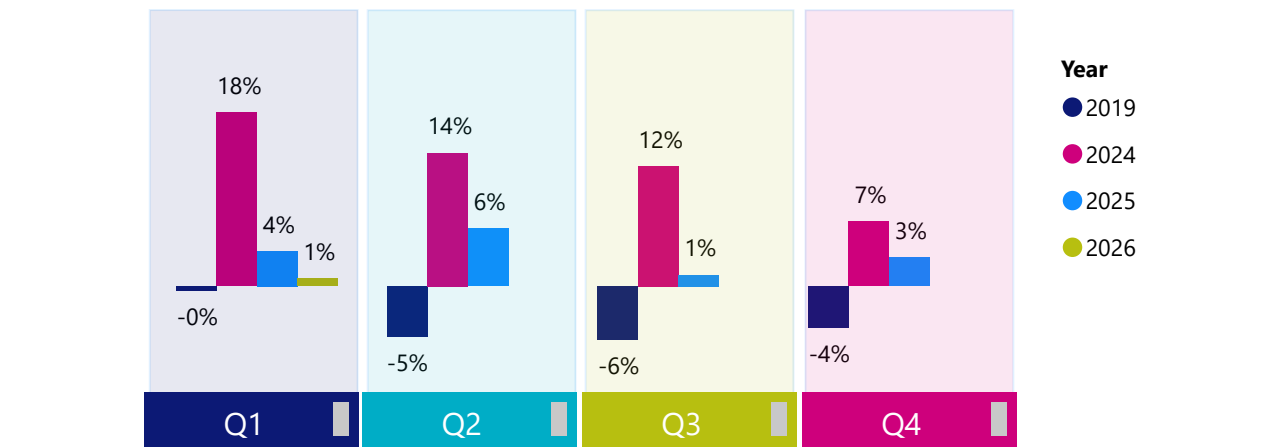
## Rolling 12-month total



## Monthly



## Year-on-year % Variance



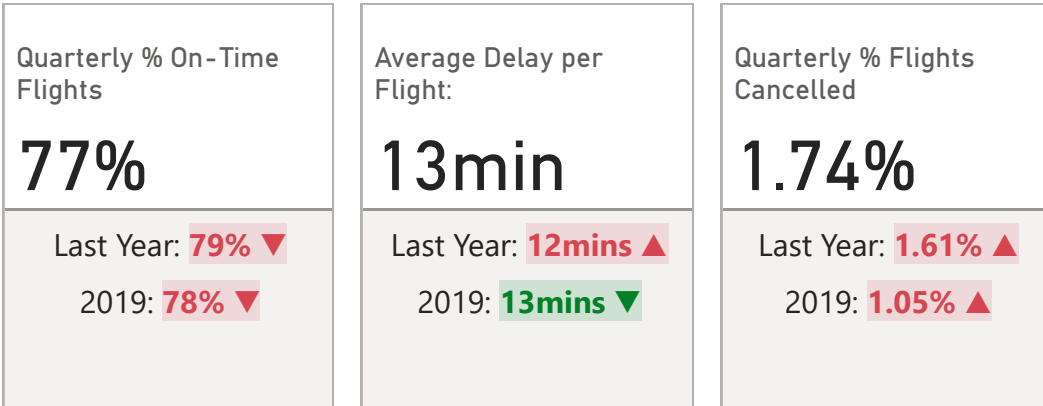
# Punctuality Trends - Q1 2026

vs Last Year & 2019

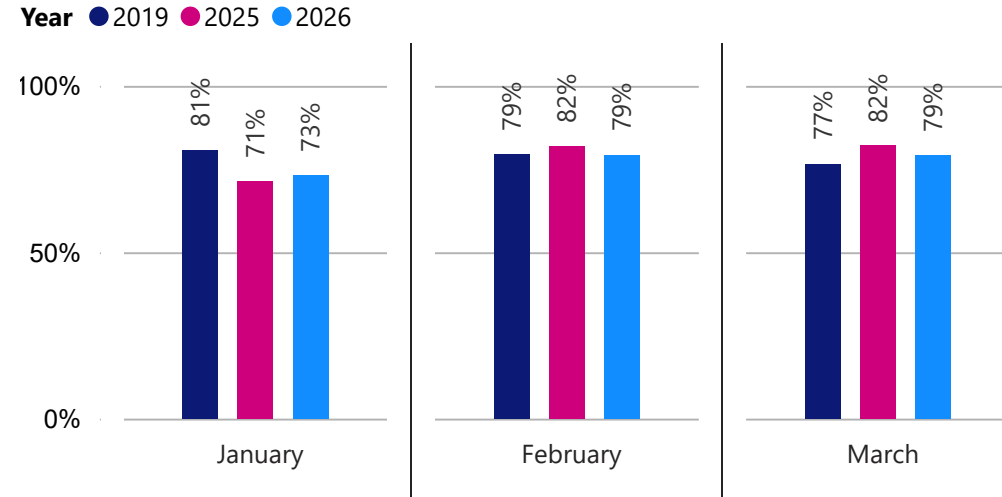
NB: Delays can occur for multiple reasons - many of which are out of the control of industry operators



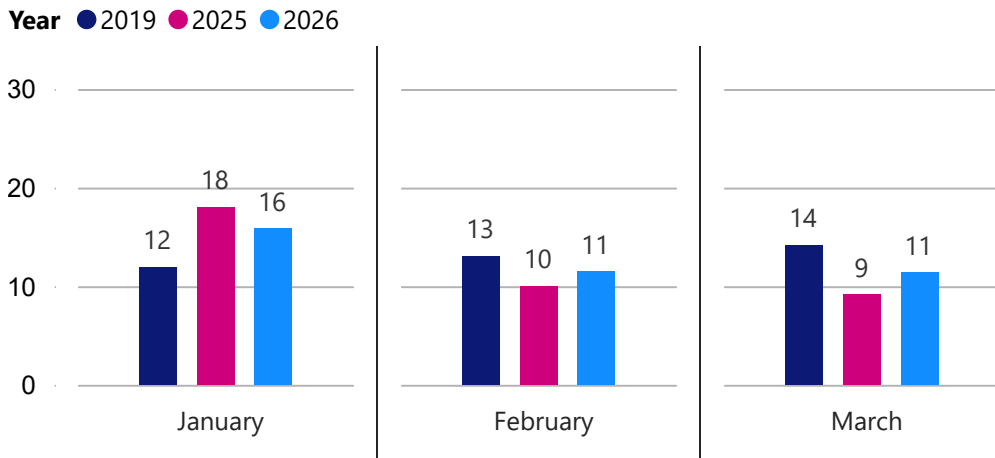
## Quarterly Results



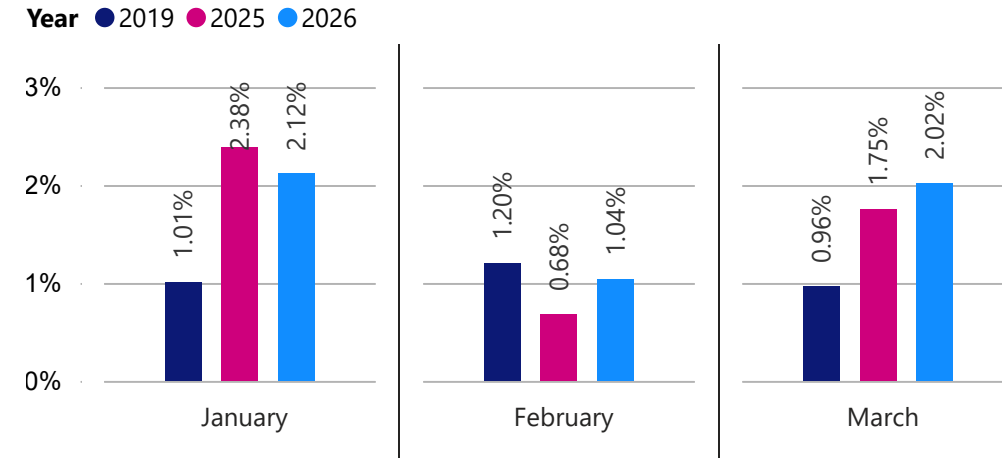
## % On-Time Flights (within 15mins of schedule)



## Average Delay per Flight (mins)



## % Flights Cancelled (inside 24hr before departure)

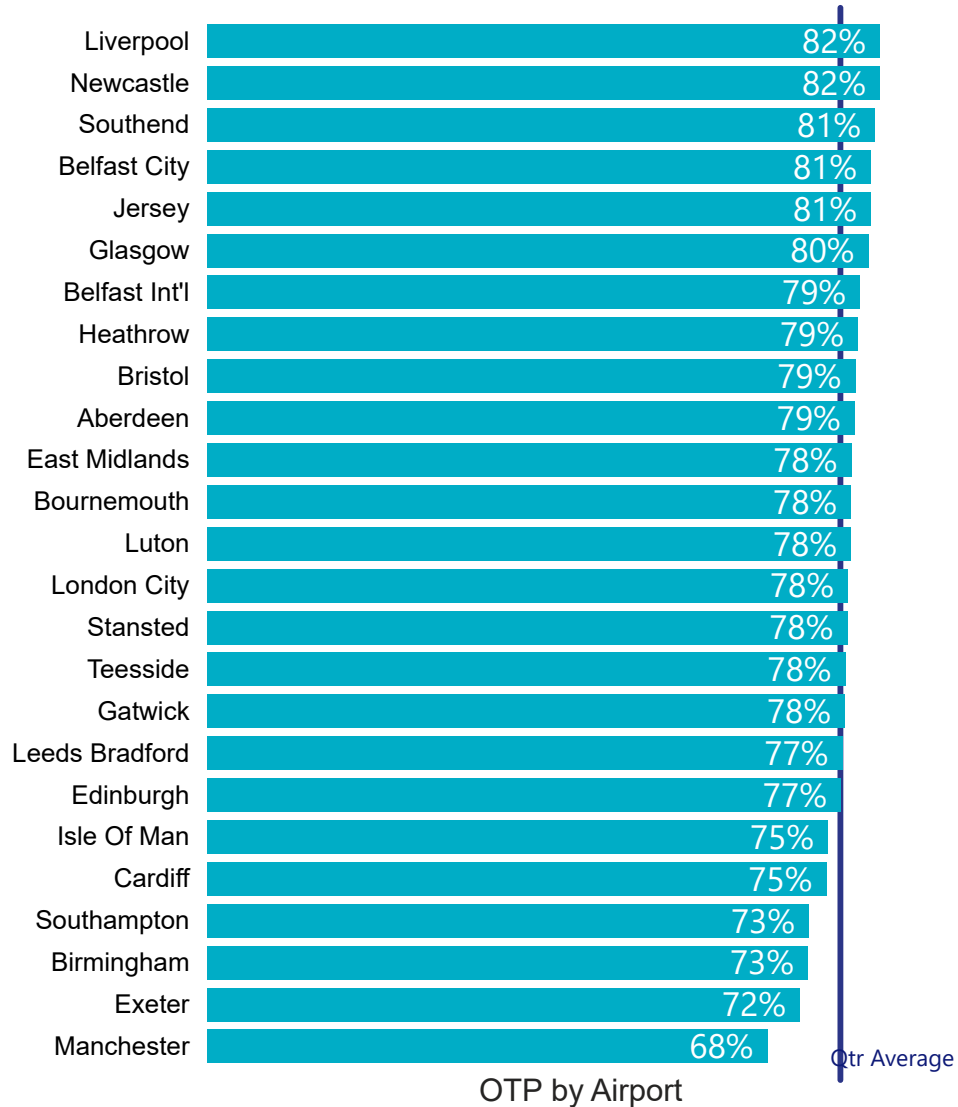


# Flight Punctuality - Q1 2026 (UK Arrivals & Departures)

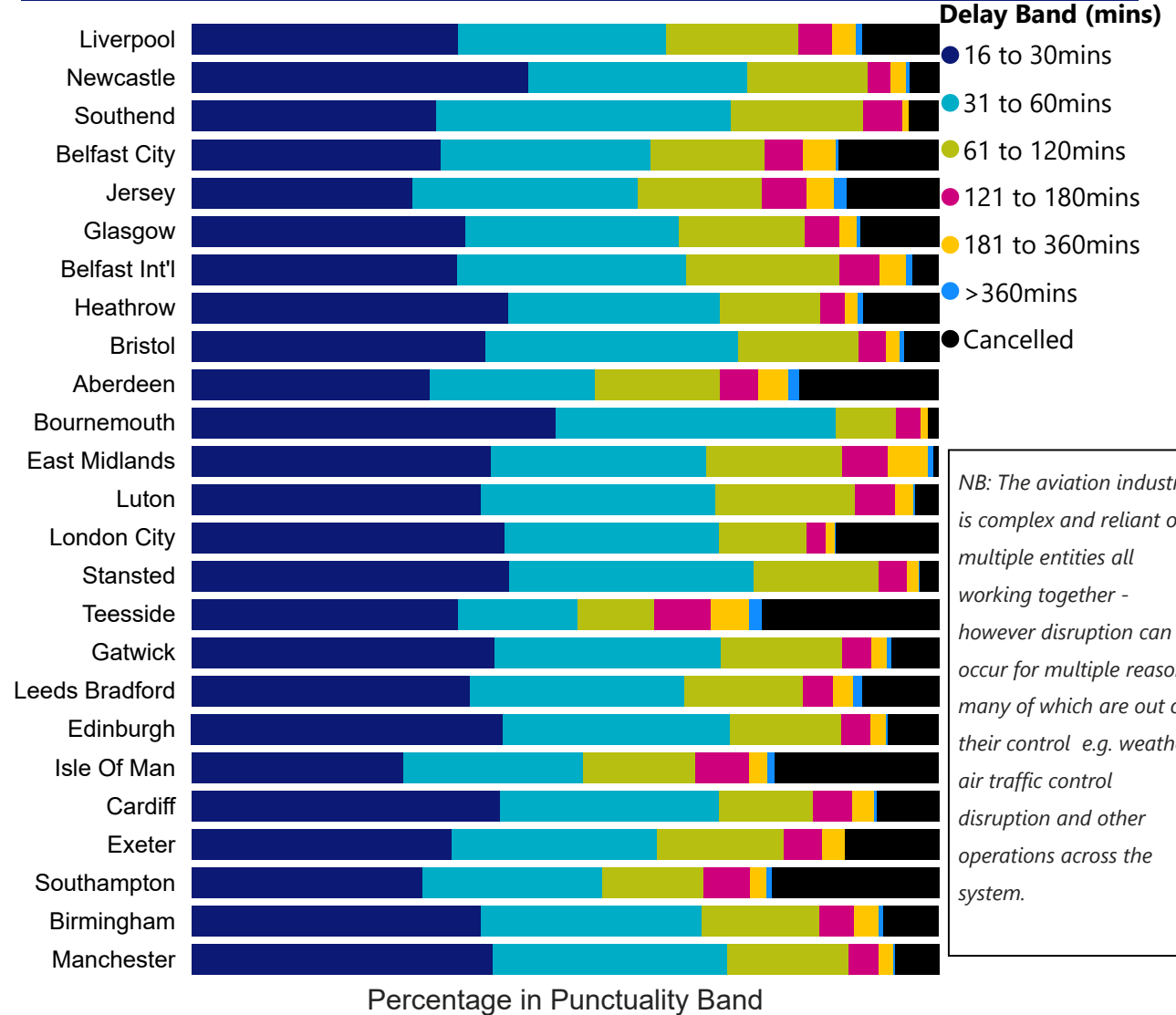
CAA (UK) reporting airports



## Percentage of flights on time (<15mins)



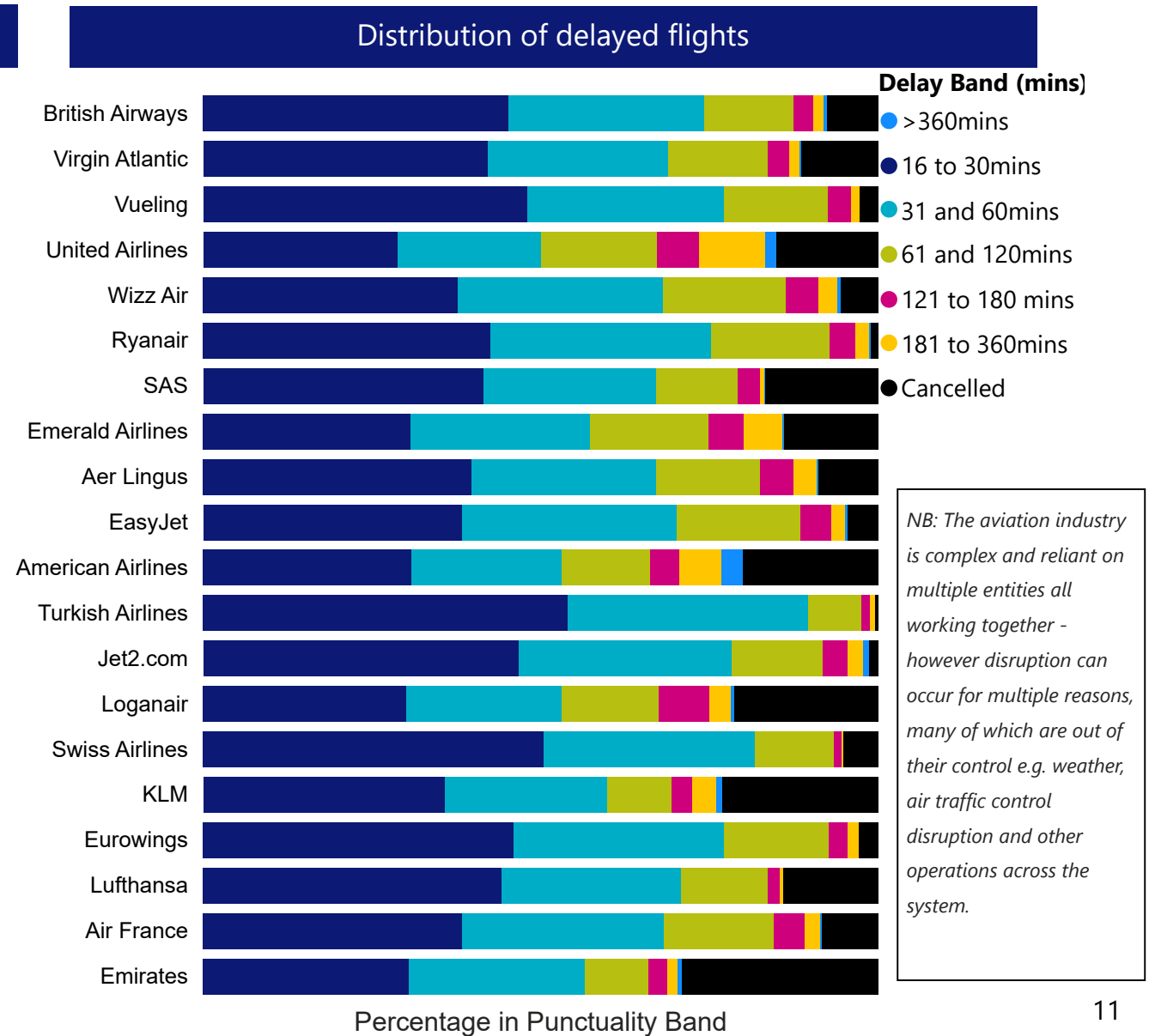
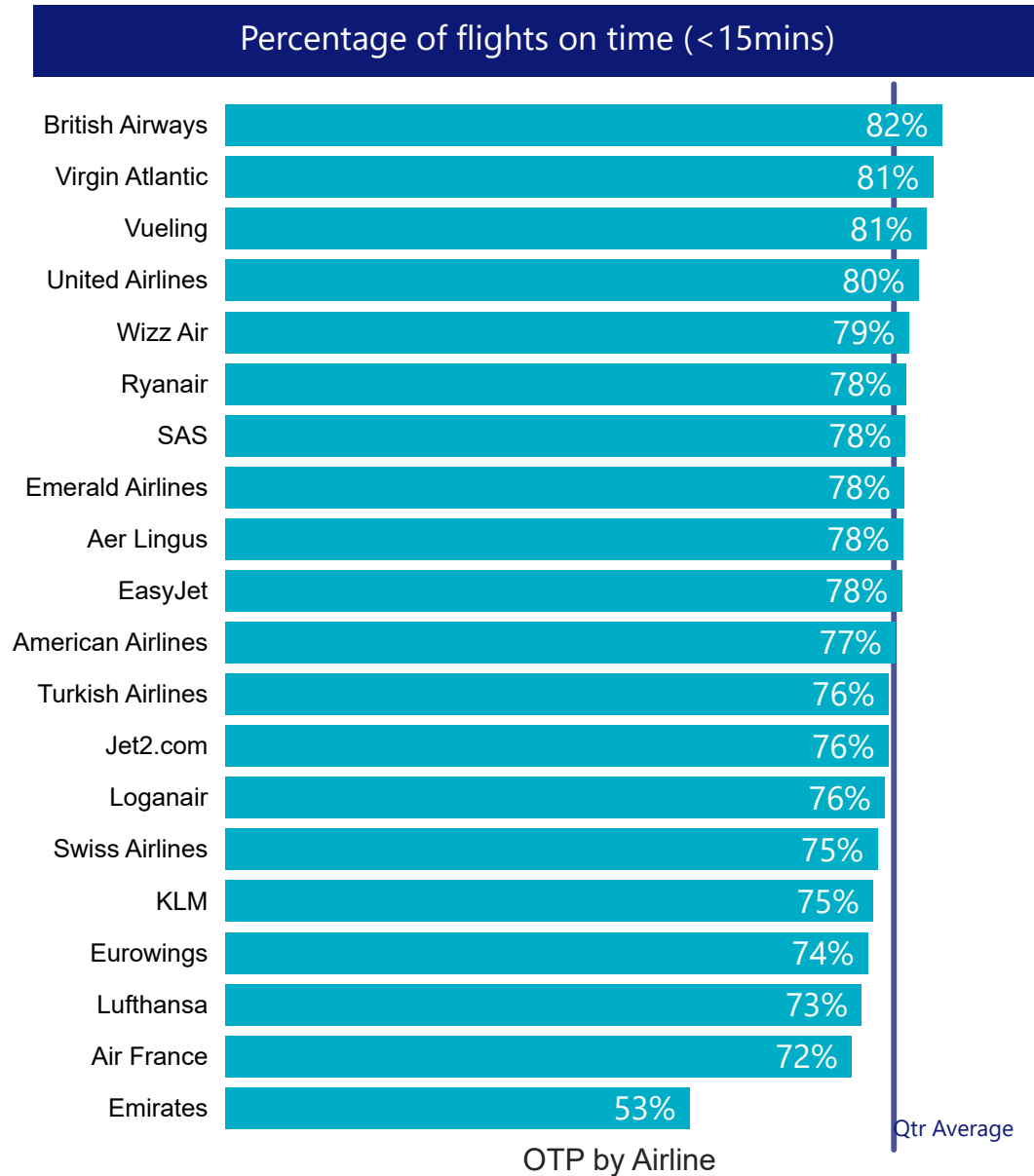
## Distribution of delayed flights



NB: The aviation industry is complex and reliant on multiple entities all working together - however disruption can occur for multiple reasons, many of which are out of their control e.g. weather, air traffic control disruption and other operations across the system.

# Flight Punctuality - Q1 2026 (UK Arrivals & Departures)

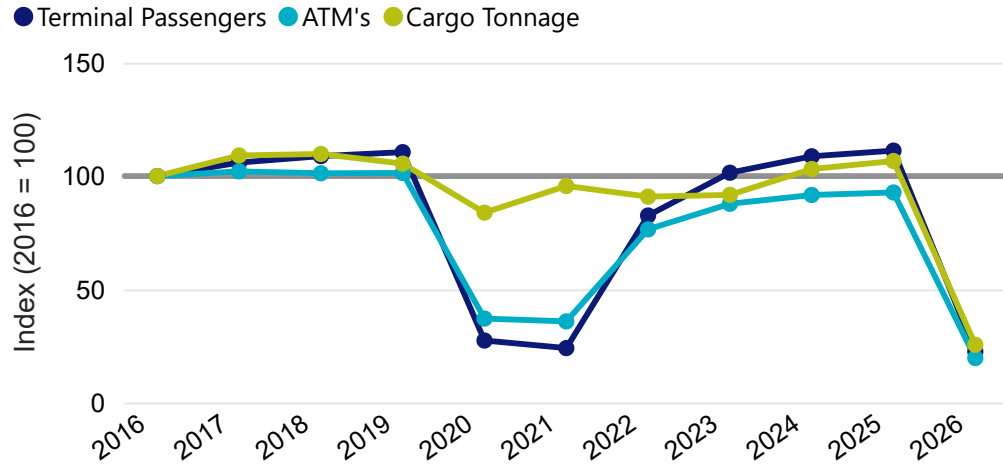
Top 20 largest airlines by ATM's



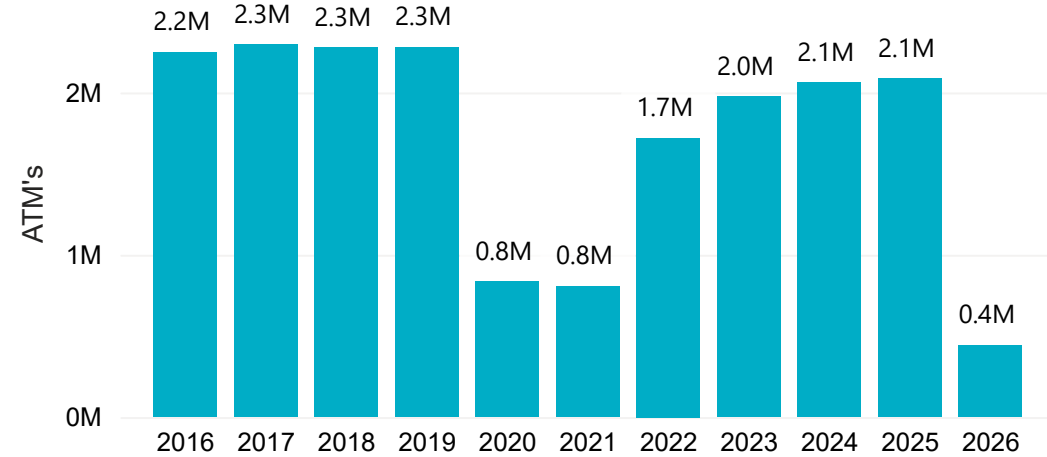
# 10 year trends

Terminal Passengers, Air Transport Movements (ATM) and Cargo Tonnage (NB: 2026 values are year-to-date and will update throughout the year)

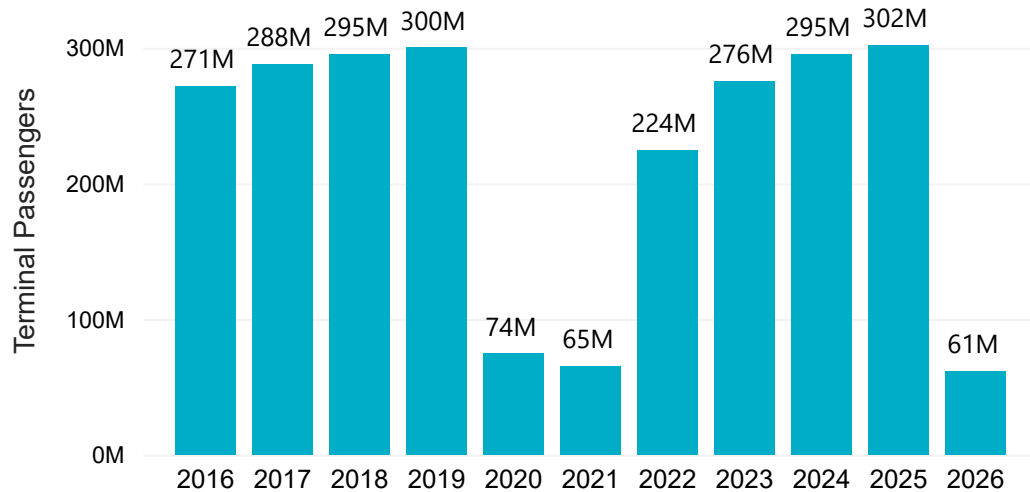
Indexed passenger, ATM and cargo growth (2016 = 100)



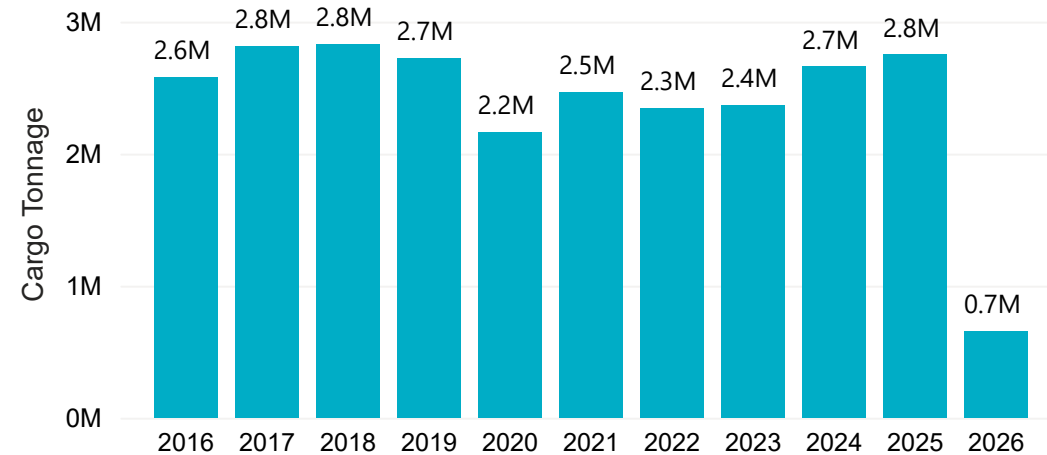
ATM's (millions)



Terminal passengers (millions)



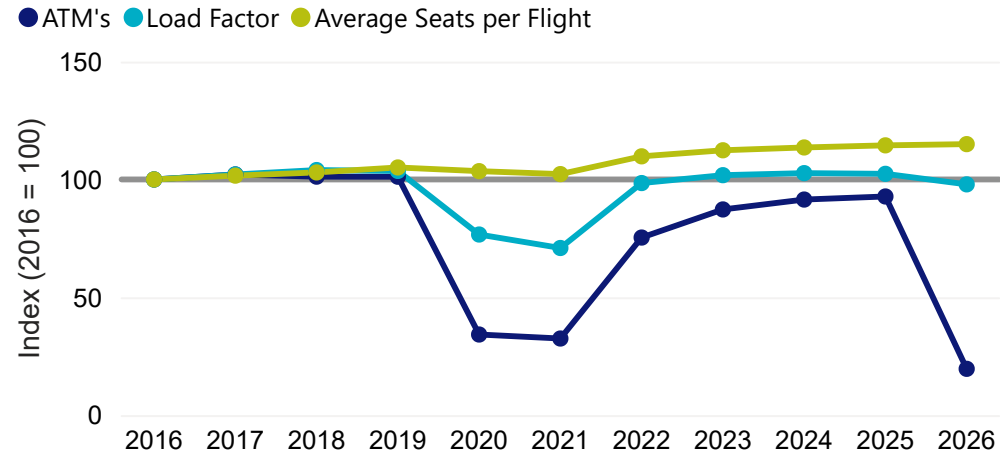
Cargo tonnage (millions)



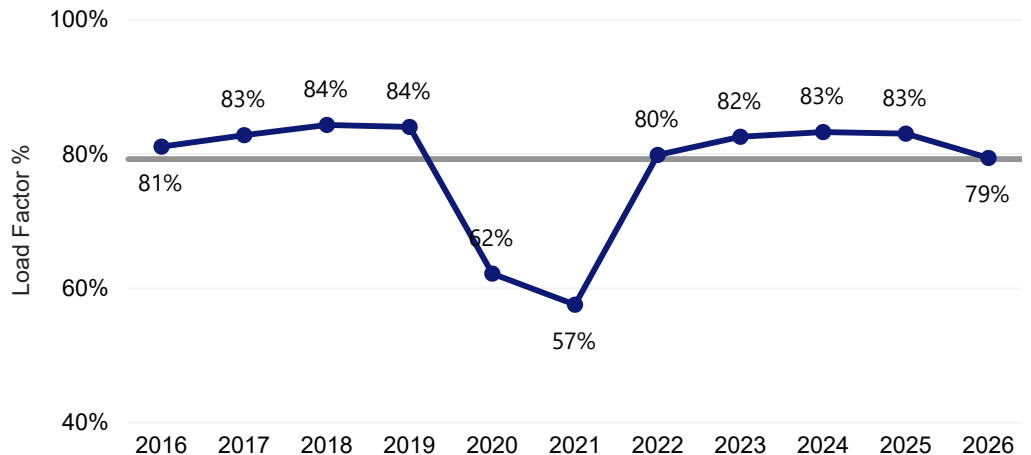
# 10 Year trends

*Load Factor & Average Seats per Flight* (NB: 2026 values are year-to-date and will update throughout the year)

## Indexed ATM, load factor and av. seats per flight (2016 = 100)

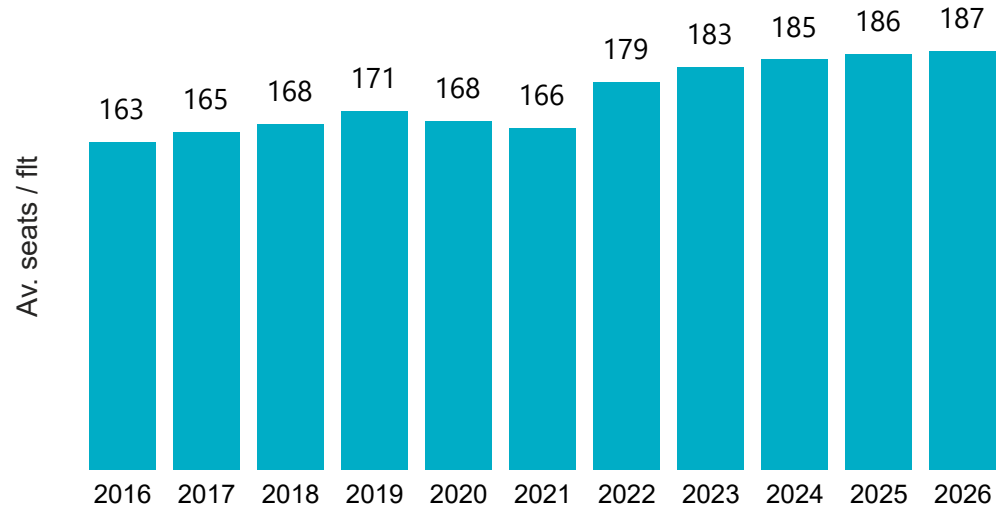


## Average load factor (%)



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

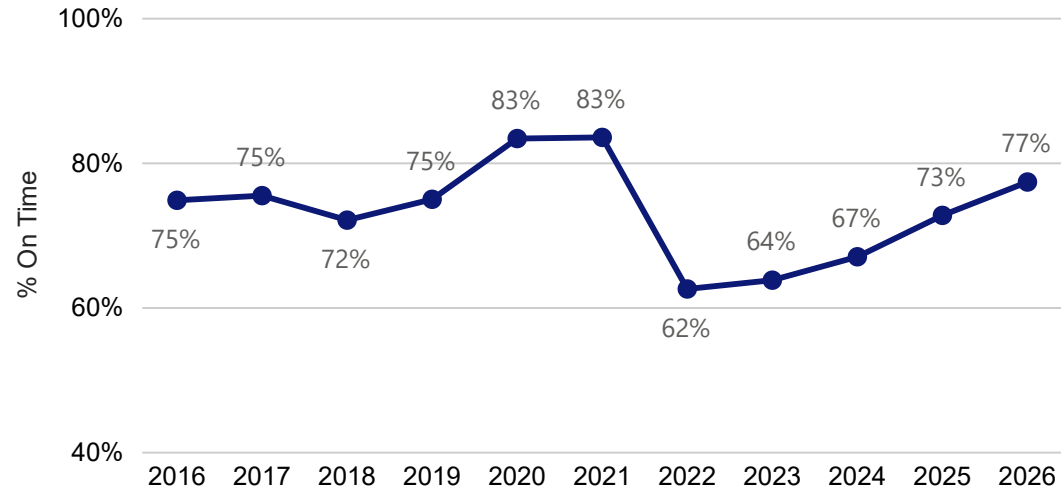
## Average seats per flight



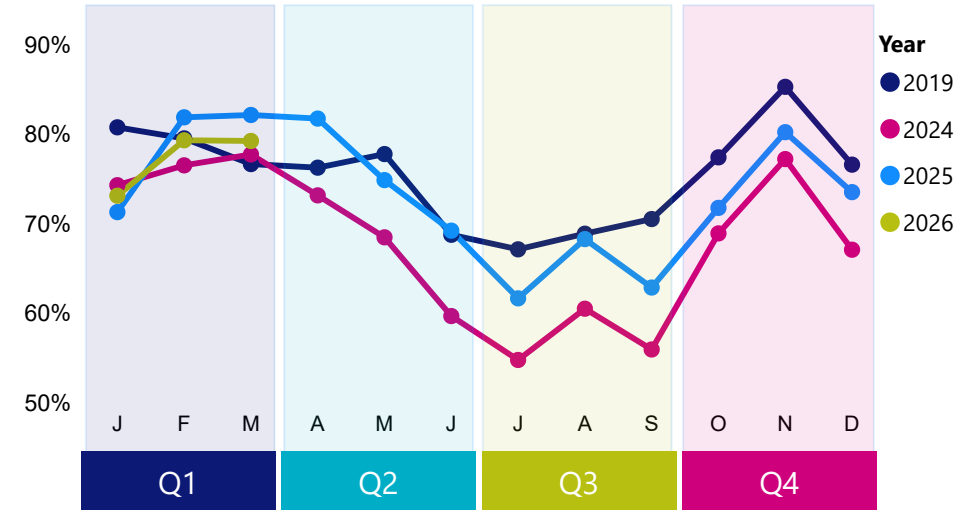
# 10 Year trends

*Punctuality* (NB: 2026 values are year-to-date and will update throughout the year)

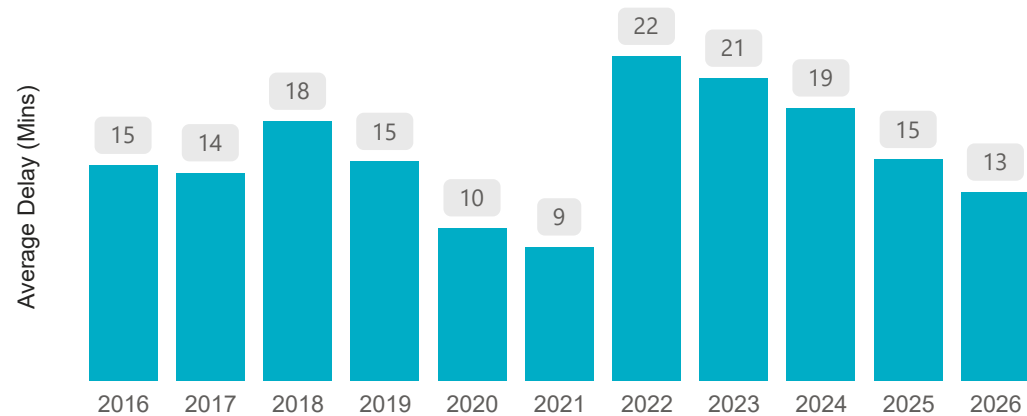
## % On-time performance (OTP) <15mins



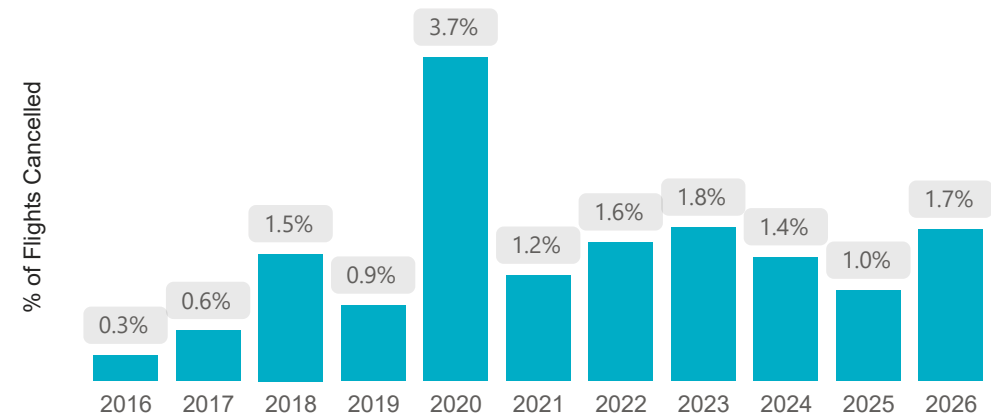
## % OTP by month (last five years)



## Average delay minutes per flight



## % of flights cancelled (within 24hr before departure)

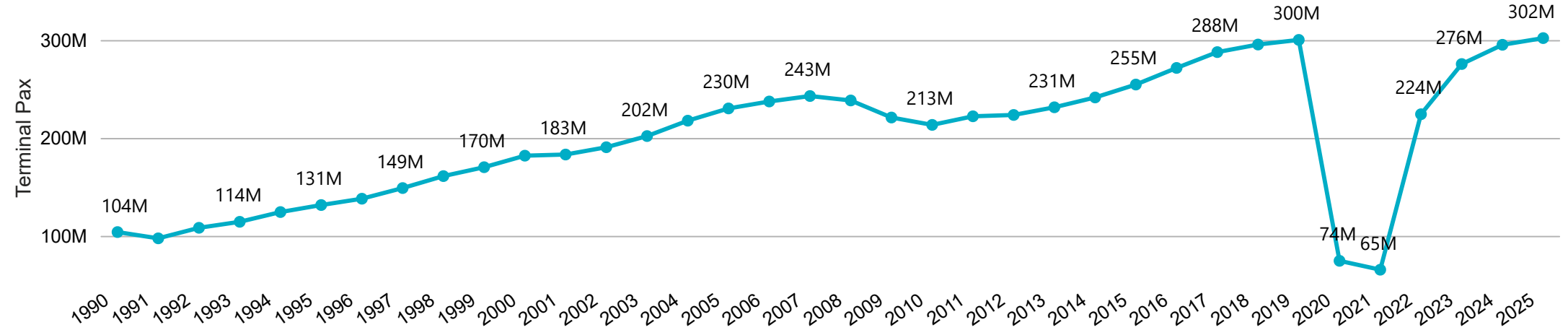


# Trend since 1990 (30+ years)

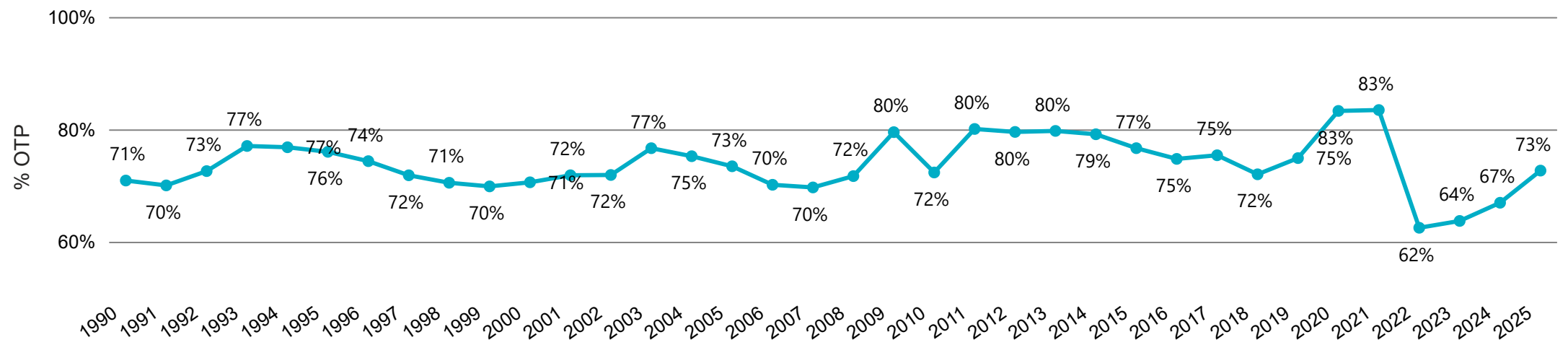
Terminal Passengers and % On-Time Performance



Annual UK Terminal Passengers (1990 - 2025)



On-Time Performance (within 15mins of schedule)

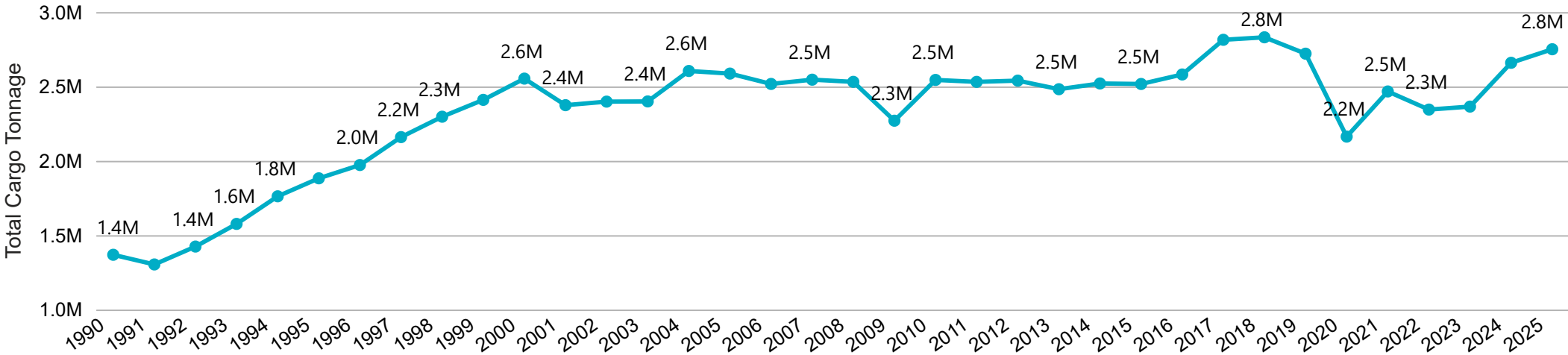


# Trends since 1990 (30+ years)

Cargo Tonnage



Annual UK Cargo Tonnage (1990 - 2025)



# Data Tables (Latest Quarter): *Terminal Passengers* - Q1 2026

Top 25 UK reporting airports		
Reporting Airport	Term. Passengers	% YoY
Heathrow	18,924,547	4% ▲
Gatwick	8,126,510	-4% ▼
Manchester	6,364,473	3% ▲
Stansted	6,121,620	-0% ▼
Luton	3,762,302	3% ▲
Edinburgh	3,362,906	7% ▲
Birmingham	2,621,182	3% ▲
Bristol	2,072,582	5% ▲
Glasgow	1,606,914	4% ▲
Belfast Int'l	1,381,079	1% ▲
Liverpool	1,074,302	3% ▲
Newcastle	1,019,026	9% ▲
London City	782,881	-1% ▼
Leeds Bradford	699,320	-1% ▼
Belfast City	572,006	6% ▲
East Midlands	484,097	1% ▲
Aberdeen	467,350	-2% ▼
Jersey	275,027	2% ▲
Bournemouth	192,011	14% ▲
Southampton	181,988	1% ▲
Cardiff	162,120	24% ▲
Inverness	152,870	7% ▲
Southend	150,878	247% ▲
Isle Of Man	137,399	1% ▲
Guernsey	135,949	0% ▲
<b>Total</b>	<b>60,831,339</b>	<b>2% ▲</b>

Top 25 Airlines		
Airline (groups)	Term. Passengers	% YoY
EasyJet	12,654,308	6% ▲
Ryanair	11,750,391	3% ▲
British Airways	11,698,440	3% ▲
Jet2.com	2,874,756	7% ▲
Wizz Air	2,329,619	-12% ▼
Tui Airways	1,565,630	-1% ▼
Virgin Atlantic	1,395,702	5% ▲
Emirates	1,088,089	-19% ▼
Aer Lingus	1,042,471	-3% ▼
KLM	954,406	-8% ▼
Vueling	700,803	-4% ▼
American Airlines	677,976	4% ▲
Lufthansa	646,908	3% ▲
Qatar Airways	612,419	-25% ▼
Loganair	569,595	6% ▲
United Airlines	517,842	16% ▲
Turkish Airlines	472,235	5% ▲
Air India	419,549	-2% ▼
Swiss Airlines	385,292	3% ▲
Air Canada	357,706	5% ▲
SAS	356,114	8% ▲
Air France	343,501	6% ▲
Delta Airlines	335,480	11% ▲
Pegasus Airlines	334,651	13% ▲
Etihad Airways	311,769	-7% ▼
<b>Total</b>	<b>54,395,652</b>	<b>2% ▲</b>

Top 25 international destinations		
OD Airport Name	Term. Passengers	% YoY
Dublin	2,392,562	8% ▲
Amsterdam	1,829,116	-8% ▼
Geneva	1,477,552	3% ▲
Tenerife (Surreina Sofia)	1,449,731	2% ▲
Dubai	1,231,498	-20% ▼
Alicante	1,191,092	3% ▲
Paris (Charles De Gaulle)	1,171,252	6% ▲
Barcelona	1,019,164	4% ▲
Malaga	985,303	1% ▲
Madrid	913,894	14% ▲
Arrecife	858,518	2% ▲
New York (Jf Kennedy)	706,353	-10% ▼
Krakov	688,195	8% ▲
Doha Hamad	656,105	-23% ▼
Lisbon	652,240	0% ▲
Istanbul	619,234	-2% ▼
Copenhagen	599,853	7% ▲
Zurich	550,263	6% ▲
Berlin Brandenburg	526,502	2% ▲
Las Palmas	521,309	11% ▲
Frankfurt Main	514,010	1% ▲
Prague	505,959	-2% ▼
Budapest	494,424	-4% ▼
Faro	492,082	0% ▲
Delhi	485,226	10% ▲

# Data Tables (Latest Quarter): ATM's - Q1 2026

Top 25 UK Reporting Airports		
Reporting Airport	ATM's	% YoY
Heathrow	112,375	-0%
Gatwick	51,140	-4%
Manchester	40,697	4%
Stansted	40,548	-1%
Edinburgh	24,112	0%
Luton	22,888	2%
Birmingham	18,755	3%
Bristol	14,359	4%
Glasgow	14,250	2%
Aberdeen	11,923	-10%
London City	10,778	-2%
Belfast Int'l	10,235	-3%
Liverpool	7,767	3%
East Midlands	7,676	-3%
Newcastle	7,461	4%
Belfast City	6,880	3%
Leeds Bradford	5,258	-2%
Southampton	3,386	-3%
Guernsey	3,257	-11%
Jersey	3,226	-4%
Norwich	2,868	-7%
Sumburgh	2,744	-8%
Kirkwall	2,209	-5%
Isle Of Man	1,987	1%
Inverness	1,807	-3%
<b>Total</b>	<b>428,586</b>	<b>-1%</b>

Top 25 international destinations		
OD Airport Name	ATM's	% YoY
Dublin	19,767	10%
Amsterdam	16,860	-7%
Geneva	10,392	-0%
Paris (Charles De Gaulle)	9,643	3%
Tenerife (Surreina Sofia)	8,398	-1%
Alicante	7,603	7%
Barcelona	6,708	2%
Malaga	6,274	2%
Madrid	5,903	14%
Arrecife	5,352	2%
Frankfurt Main	4,995	-12%
Zurich	4,827	1%
Copenhagen	4,572	1%
Lisbon	4,476	2%
Krakow	4,078	9%
Istanbul	4,043	-1%
Berlin Brandenburg	3,723	-2%
New York (Jf Kennedy)	3,600	-11%
Dubai	3,573	-13%
Faro	3,450	6%
Las Palmas	3,298	13%
Prague	3,229	-9%
Budapest	3,020	-6%
Doha Hamad	2,466	-20%
Delhi	1,666	9%

ATM's by operation type		
Op. Type	ATM's	% YoY
Scheduled	422,920	0%
Charter	19,977	-13%

ATM's by market		
Market	ATM's	% YoY
W. Europe	242,331	1%
Domestic	98,635	-3%
RoW	43,591	2%
E. Europe	32,215	-2%
N. America	26,129	-2%

# Data Tables (Latest Quarter): *Cargo Tonnage - Q1 2026*



Cargo Tonnage by UK reporting airport			
Reporting Airport	Cargo Tonnage	% YoY	
Heathrow	387,667	-1%	▼
East Midlands	98,697	8%	▲
Stansted	66,418	-10%	▼
Gatwick	28,378	15%	▲
Manchester	21,911	8%	▲
Prestwick	14,462	492%	▲
Birmingham	13,072	1%	▲
Bournemouth	6,972	1%	▲
Belfast Int'l	6,022	-31%	▼
Edinburgh	4,289	-13%	▼
Luton	3,435	-52%	▼
Glasgow	2,075	-7%	▼
Aberdeen	1,661	19%	▲
Teesside	1,187	177%	▲
Newcastle	717	15%	▲
Guernsey	290	-48%	▼
Sumburgh	265	-13%	▼
Kirkwall	235	-16%	▼
Stornoway	204	4%	▲
Benbecula	166	17%	▲
Jersey	122	9%	▲
Islay	60	-4%	▼
Humberstone	20	-17%	▼
Southampton	16	21%	▲
Bristol	15	1998%	▲
<b>Total</b>	<b>658,354</b>	<b>1%</b>	

Top 25 international destinations			
OD Airport Name	Cargo Tonnage	% YoY	
New York (Jf Kennedy)	33,999	-6%	▼
Leipzig	29,994	0%	▲
Dubai	29,469	3%	▲
Doha Hamad	23,463	-22%	▼
Los Angeles International	20,289	2%	▲
Mumbai	16,293	21%	▲
Delhi	14,555	1%	▲
Guangzhou Baiyun International	14,476	36%	▲
Hong Kong (Chek Lap Kok)	14,407	28%	▲
Shanghai (Pu Dong)	13,442	6%	▲
Cologne Bonn	13,053	-6%	▼
Chicago (O'Hare)	12,063	11%	▲
Singapore	11,763	11%	▲
Beijing	11,608	56%	▲
Miami International	11,294	-6%	▼
Paris (Charles De Gaulle)	10,555	12%	▲
Brussels	10,395	-3%	▼
Istanbul	10,344	-15%	▼
Cincinnati	10,228	-13%	▼
Abu Dhabi International	9,753	-4%	▼
Toronto	9,604	9%	▲
Dallas/Fort Worth	9,362	8%	▲
Memphis	8,474	-4%	▼
Atlanta	8,377	9%	▲
Tokyo (Haneda)	8,151	1%	▲

Cargo Tonnage by operation type			
Op. Type	Cargo Tonnage	% YoY	
Scheduled	634,853	3%	▲
Charter	23,542	-38%	▼

Cargo Tonnage by market			
Market	Cargo Tonnage	% YoY	
RoW	303,030	4%	▲
N. America	211,819	-3%	▼
W. Europe	119,688	4%	▲
Domestic	22,922	-16%	▼
E. Europe	935	-26%	▼