

ForwardKeys Flight Searches Monthly Update Data up to April 2025

VisitBritain/VisitEngland Research
(Published May 2025)

Key takeouts

The story: overall, flight searches to the UK continued to decline in April 2025, with declines across both long haul and short haul markets.

- Searches for the UK were down 8% in April 2025 and year-to-date searches were down 3% vs the previous year.
- Searches from both long haul and short haul markets declined in April 2025 vs April 2024, although year-to-date short haul markets are ahead of 2024 whereas long haul markets are down 9%.
- Saudi Arabia and Netherlands saw the highest growth in flight searches whilst China, Australia, the UAE and the USA saw the largest declines in April 2025 vs April 2024.
- From a competitor view, searches to the Irish Republic improved in April vs March and were on par with the previous year , in contrast to the dip seen for the UK.
- England saw the largest decline across UK nations, followed by a gentler decline for Scotland and positive growth for Wales.

About the data

These slides show data from ForwardKeys *Flight Searches* module on the volume of flight searches to the UK, and the growth rate compared to comparison years. Data shown is for searches to the UK and to the Irish Republic, where stated.

Some notes on this data:

- The ForwardKeys database aggregates searches for the largest travel agencies and metasearch engines; kiwi.com, kiwi's partners (Edreams, eSky) and other metasearch engines (Google Flight, Kayak, Skyscanner, Momondo and wego) and Kiwi's airline partners (around 800). This amounts to 40 billion searches a day which covers X of the global market.
- Data is available from 2019 to present day with a 2 week lag.
- Data can be analysed at a UK level as well as by nation and city level.
- Data in the report and dashboard covers inbound searches to the UK
- This analysis only includes searches which include a stay in the UK and therefore excludes day trips, one-way trips or those returning home to the UK.
- When comparing to other inbound searches also bear in mind that this data does not capture any passengers/bookings made via train/ferry.
- Penetration of flight searches is higher in Europe and North America, and low in Asian markets.
- This report uses data that was most recently updated on 14th May 2025.

Source: ForwardKeys Flight Searches

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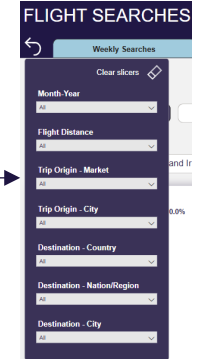
Additional data available on vb.org

See more data on the [ForwardKeys Flight Searches Dashboard](#) on visitbritain.org.

Different geographies

Destination – Country (UK vs Irish Republic)
Destination – Nation (Eng, Scot, Wales)
Destination - City
Trip Origin - Market
Trip Origin - City

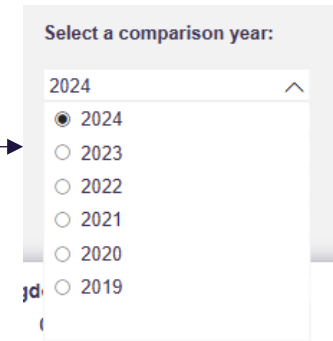
Click on the slicer icon in the top left of the dashboard. Select a 'Trip Origin' or 'Destination' filter to select the geography of your choice.



Multiple years of data

2019
2021
2022
2023
2024
2025

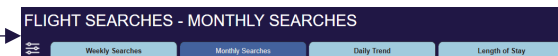
At the top of each tab you can select the year you want to show and the year you want to compare to.



View granular insights

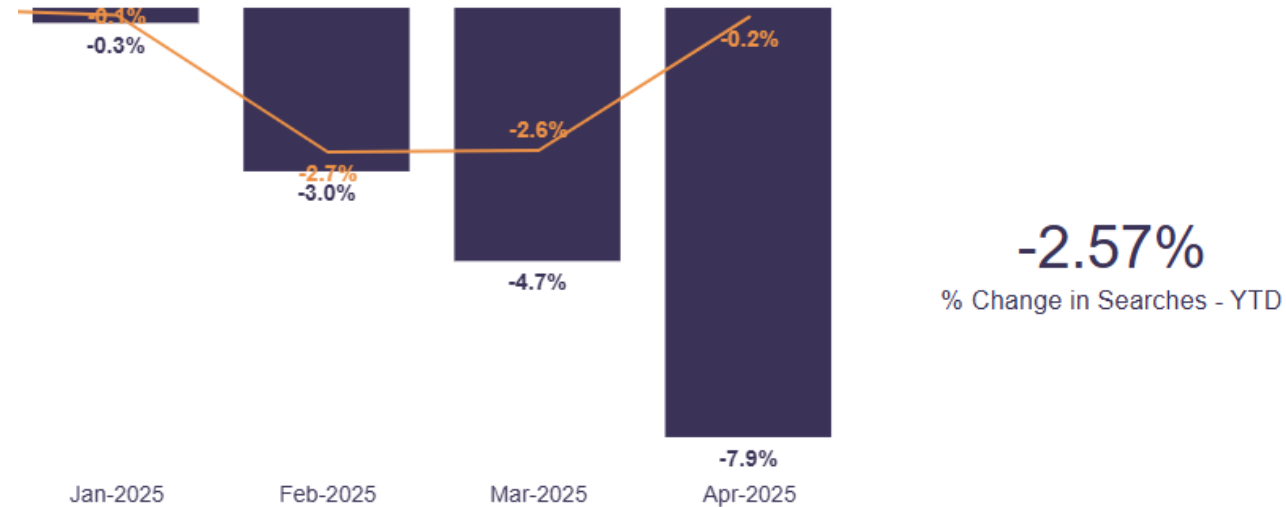
Daily Search Trends
Weekly Search Trends
Monthly Search trends
Length of stay Trends

Select the different tabs to view data at different date levels



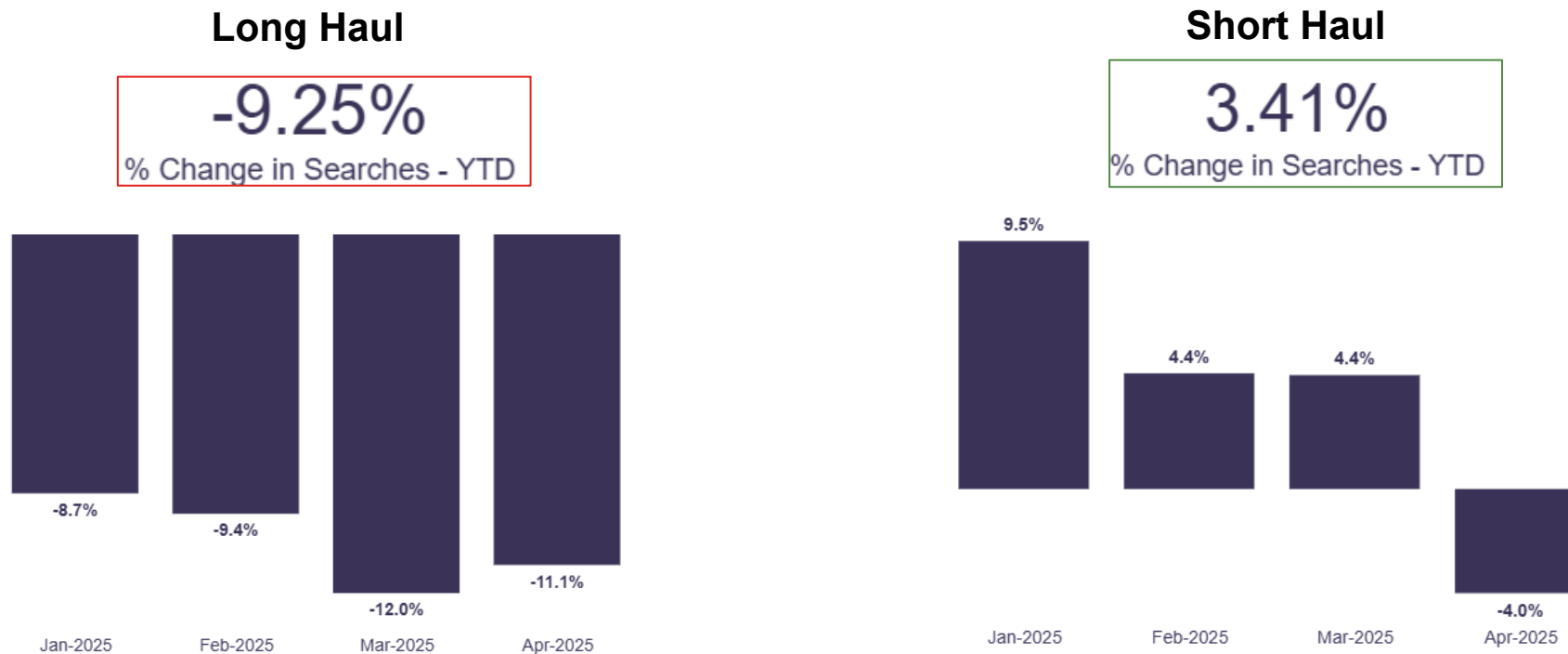
Flight search trends | Searches to the UK continue to dip into April 2025

- In April 2025, flight searches to the UK were down 8% vs April 2024, continuing the decline from the start of the year. Flight searches to the Irish Republic were slightly ahead, on par with 2024. Year-to-date searches to the UK were down 3% vs the previous year.



Flight search trends | April was a weak month for both SH and LH markets

- Flight searches from long haul markets are currently tracking down in 2025 vs 2024 with a slight improvement to -11% in April 2025 vs April 2024. Short haul markets are slightly ahead but saw a dip in searches in April to -4% vs the previous year.
- Year-to-date searches from long haul markets were down 9% vs 2024 whilst searches from short haul markets were up 3% vs 2024.



Source: ForwardKeys Flight Searches refreshed 14/05/2025. % growth vs previous year shown. *YTD may be different to the dashboard as the dashboard is updated weekly. Long Haul markets include USA, Australia, Canada, India, UAE, Saudi Arabia, and China. Short Haul markets include Spain, Germany, Italy, France, Netherlands, Sweden, Switzerland, and Norway

Origin market trends | Saudi Arabia and Netherlands lead

Market	Jan-2025	Feb-2025	Mar-2025	Apr-2025
Australia	-8.6%	-6.2%	-15.8%	-19.5%
Canada	-6.8%	-12.0%	-3.6%	-1.0%
China	12.4%	3.6%	-7.5%	-21.1%
France	2.8%	-3.3%	-1.1%	-11.5%
Germany	7.6%	3.3%	4.7%	-1.2%
India	-4.9%	-6.2%	-17.4%	-2.7%
Italy	16.6%	13.4%	9.1%	-3.6%
Netherlands	12.3%	6.3%	3.9%	2.2%
Norway	-8.7%	-9.2%	-6.0%	-7.9%
Saudi Arabia	26.4%	9.9%	14.3%	17.1%
Spain	13.4%	7.6%	7.0%	-4.6%
Sweden	1.8%	-9.1%	-3.6%	-1.3%
Switzerland	9.6%	4.5%	2.6%	-1.1%
U.S.A.	-11.3%	-11.2%	-13.6%	-13.8%
United Arab Emirates	-1.4%	-1.7%	-2.3%	-16.1%

- Saudi Arabia (17%) and Netherlands (2%) were the only markets to see searches up in April 2025 vs April 2024, within our market set.
- Within Europe, many markets saw searches just below 2024 levels in the latest month, but France (-12%) and Norway (-8%) were further behind.
- Across long haul markets, China (-21%), Australia (-20%), the UAE (-16%) and the USA (-14%) saw the largest declines whilst India (-3%) and Canada (-1%) saw gentler decreases in April 2025 vs April 2024.

Source: ForwardKeys Flight Searches refreshed 14/05/2025. % growth vs previous year shown. Penetration of flight searches is higher in Europe and North America, and low in Asian markets.

Destination nation trends | Searches to England dip further in April 2025

- Flight searches to England fell to -10% in April 2025, the weakest month in 2025 so far in terms of growth.
- Scotland saw a slightly weaker decline of -2%, followed by the UK Crown Dependencies (-3%).
- Northern Ireland saw the highest growth vs the previous year at 18% followed by Wales at 4%.

Nation/Region	Jan-2025	Feb-2025	Mar-2025	Apr-2025
England	-3.8%	-5.2%	-7.6%	-10.1%
Scotland	9.0%	2.6%	3.1%	-1.9%
Wales	4.4%	-1.1%	4.7%	3.8%
Northern Ireland	33.7%	29.4%	27.3%	17.8%
UK Crown Dependencies	-4.8%	-4.6%	-7.9%	-3.4%

Destination city trends | London accounts for half of flight searches

- The destinations with the highest volume of searches in April 2025 were London, Edinburgh and Manchester, although they did all see declines vs the previous year.
- Exeter, the Shetland Islands and Alderney had the highest growth in April 2025 vs April 2024.

City	Rank	YoY % Change in Searches
Exeter	1	30.0%
Shetland Islands	2	29.1%
Alderney	3	19.8%
Belfast	4	19.5%
Nottingham	5	18.7%
Glasgow	6	17.5%
Humberside	7	15.4%
Dundee	8	13.3%
Bournemouth	9	6.9%
Durham Tees Valley	10	6.3%
Cardiff	11	3.8%
Leeds	12	3.4%
Birmingham	13	-0.4%
Liverpool	14	-1.5%
Derry	15	-2.7%

City	Rank	Searches
London	1	5.2M
Edinburgh	2	1.7M
Manchester	3	1.1M
Glasgow	4	477.6K
Birmingham	5	449.0K
Bristol	6	229.1K
Liverpool	7	161.9K
Newcastle	8	134.4K
Belfast	9	129.5K
Leeds	10	110.0K
Inverness	11	82.0K
Nottingham	12	79.2K
Cardiff	13	73.7K
Aberdeen	14	61.2K
Southampton	15	53.2K