

# **ForwardKeys Flight Searches Monthly Update Data up to May 2025**

VisitBritain/VisitEngland Research  
(Published June 2025)

# Key takeouts

**The story: overall, the decline seen in flight searches to the UK in the previous month slowed slightly in May, with long haul markets seeing a YoY decline and short haul markets surpassing 2024 levels.**

- Searches for the UK were down 6% in May 2025 and year-to-date searches were down 3% vs the previous year.
- Searches from long haul markets continue to decline in May 2025 vs May 2024, while short haul markets moved just above previous year levels. Short haul markets were ahead of long haul markets when looking at year-to-date figures (4% vs 9%).
- Netherlands and Sweden saw the highest growth in flight searches whilst China, Australia, the USA and India saw the largest declines in May 2025 vs May 2024.
- From a competitor view, searches to the Irish Republic surpassed previous year levels in May 2025, in contrast to the decline seen for the UK.
- England was the only UK nation to see a decline in searches in May 2025. Northern Ireland saw the largest growth with Wales and Scotland seeing more modest YoY growth.

# 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.
- The origin and destination refers to the location of the airport being searched for rather than where the search is being made from.
- The report and dashboard covers inbound searches to the UK and Irish Republic.
- Data can be analysed by **origin** market and city for which we have access to **15 markets** – Australia, Canada, China, France, Germany, India, Italy, Netherlands, Norway, Saudi Arabia, Spain, Sweden, Switzerland, USA and the UAE. The **total** in the report and dashboard **refers to a sum/average of these 15 markets**.
- Data can be analysed by **destination** at the UK/Irish Republic level as well as by UK nation and city level.
- This analysis only includes searches which include a stay in the UK/IE 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 11<sup>th</sup> June 2025.**

Source: ForwardKeys Flight Searches

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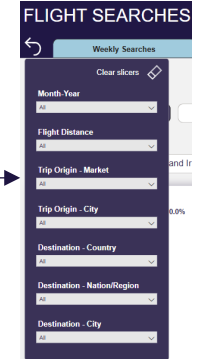
# Additional data available on vb.org

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

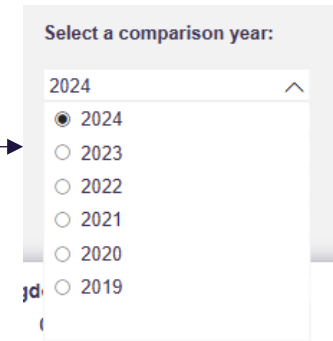
Click on the slicer icon in the top left of the dashboard. Select a 'Trip Origin' or 'Destination' filter to select the geography of your choice.



## Multiple years of data

2019  
2021  
2022  
2023  
2024  
2025

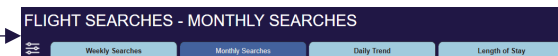
At the top of each tab you can select the year you want to show and the year you want to compare to.



## View granular insights

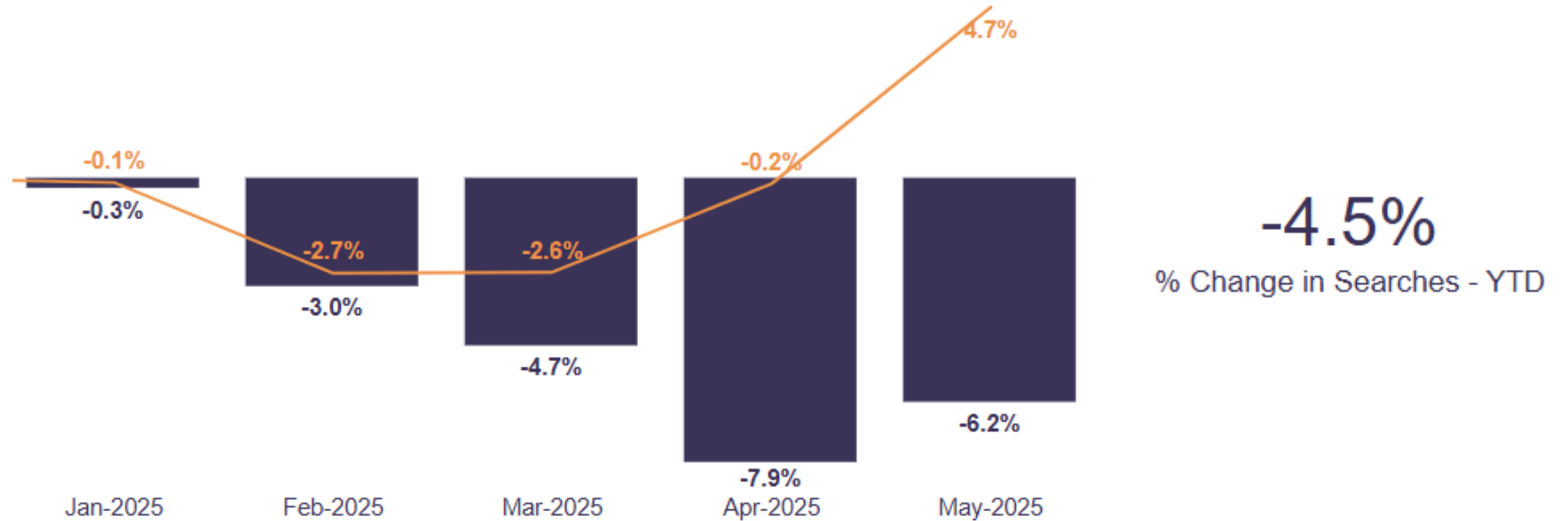
Daily Search Trends  
Weekly Search Trends  
Monthly Search trends  
Length of stay Trends

Select the different tabs to view data at different date levels



## Flight search trends | Searches to the UK remained under 2024 levels in May 2025

- In May 2025, flight searches to the UK were down 6% vs May 2024, a gentler decline vs April. In contrast, flight searches to the Irish Republic were up 5%. Overall, year-to-date (Jan-May 2025) searches to the UK were down 3% vs the previous year.



## Flight search trends by LH and SH | SH markets surpass 2024 while LH markets continue to dip

- Flight searches from long haul markets are continuing to track below 2024 levels in May 2025 with a slight dip seen compared to the previous month. Short haul markets are ahead of long haul markets surpassing previous year levels in May 2025.
- Year-to-date (Jan-May 2025) searches from long haul markets were down 9% vs 2024 whilst searches from short haul markets were up 4% vs 2024.



Source: ForwardKeys Flight Searches refreshed 11/06/2025. % 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. Overall flight searches refer to the average of 15 inbound markets.

## Origin market trends | Netherlands and Sweden lead for growth

Market	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025
Australia	-9%	-6%	-16%	-20%	-17%
Canada	-7%	-12%	-4%	-1%	2%
China	12%	4%	-8%	-21%	-21%
France	3%	-3%	-1%	-11%	-2%
Germany	8%	3%	5%	-1%	5%
India	-5%	-6%	-17%	-3%	-14%
Italy	17%	13%	9%	-4%	-1%
Netherlands	12%	6%	4%	2%	8%
Norway	-9%	-9%	-6%	-8%	4%
Saudi Arabia	26%	10%	14%	17%	1%
Spain	13%	8%	7%	-5%	-2%
Sweden	2%	-9%	-4%	-1%	8%
Switzerland	10%	4%	3%	-1%	1%
U.S.A.	-11%	-11%	-14%	-14%	-14%
United Arab Emirates	-1%	-2%	-2%	-16%	-10%

- Netherlands (8%) and Sweden (8%) saw the largest growth in flight searches to the UK vs May 2024. Germany (5%), Norway (4%), Canada (2%), Saudi Arabia (1%) and Switzerland (1%) also all saw YoY growth in flight searches.
- Within Europe, most markets saw searches just above 2024 levels in the latest month, with only France (-2%), Spain (-2%) and Italy (-1%) seeing declines.
- Across long haul markets, China (-21%), Australia (-17%), the USA (-14%), India (-14%) and the UAE (-10%) saw the large declines compared to May 2024.

Source: ForwardKeys Flight Searches refreshed 11/06/2025. % growth vs previous year shown. Penetration of flight searches is higher in Europe and North America, and low in Asian markets. Overall flight searches refer to the average of 15 inbound markets.

## Destination nation trends | Searches to England continue to track below 2024

- Flight searches to England remained below levels seen in the previous year at -9% in May 2025, a similar decline to the previous month.
- All other UK nations surpassed 2024 level; Scotland saw growth of 3%, with Wales further ahead at 9%.
- Northern Ireland saw the highest growth vs the previous year at 33%, followed by UK Crown Dependencies at 22%.

Nation/Region	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025
England	-4%	-5%	-8%	-10%	-9%
Scotland	9%	3%	3%	-2%	3%
Wales	4%	-1%	5%	4%	9%
Northern Ireland	34%	29%	27%	18%	33%
UK Crown Dependencies	-5%	-5%	-8%	-3%	22%

Source: ForwardKeys Flight Searches refreshed 11/06/2025. % growth vs previous year shown. Overall flight searches refer to the average of 15 inbound markets.



## Destination city trends | London accounts for half of flight searches

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

City	Rank	YoY % Change in Searches
Jersey	1	47%
Exeter	2	43%
Alderney	3	41%
Belfast	4	37%
Glasgow	5	30%
Dundee	6	22%
Nottingham	7	20%
Humberside	8	17%
Tiree, Inner Hebrides	9	10%
Guernsey	10	10%
Barra	11	10%
Cardiff	12	9%
Bournemouth	13	8%
Leeds	14	8%
Durham Tees Valley	15	6%

City	Rank	Searches
London	1	5.2M
Edinburgh	2	1.7M
Manchester	3	1.1M
Glasgow	4	472.4K
Birmingham	5	445.6K
Bristol	6	239.0K
Liverpool	7	154.8K
Newcastle	8	138.7K
Belfast	9	126.1K
Leeds	10	109.4K
Cardiff	11	81.0K
Nottingham	12	78.9K
Inverness	13	76.5K
Aberdeen	14	62.4K
Southampton	15	57.8K

Source: ForwardKeys Flight Searches refreshed 11/06/2025. % growth vs previous year shown. Overall flight searches refer to the average of 15 inbound markets.

**For more information, please contact**

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