

ForwardKeys Flight Searches Monthly Update Data up to June 2025

VisitBritain/VisitEngland Research
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Key takeouts

The story: overall, searches were down 7% in June 2025, with long haul seeing a larger decline vs short haul markets

- Searches for the UK were down 7% in June 2025 and year-to-date searches were down 5% vs the previous year.
- Searches from long haul markets saw the same decline as May at -12%, with a slight decline also seen from short haul markets at -1%. Short haul markets were ahead of long haul markets when looking at year-to-date figures (3% vs -11%).
- Canada saw the highest YoY growth followed by moderate growth from European markets Netherlands, Italy and Spain. China, Australia, the USA and India saw the largest declines in June 2025 vs June 2024.
- From a competitor view, searches to the Irish Republic surpassed previous year levels in June 2025, in contrast to the decline seen for the UK.
- England continued to be the only UK nation to see a decline in searches in June 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 7th July 2025**.

Source: ForwardKeys Flight Searches

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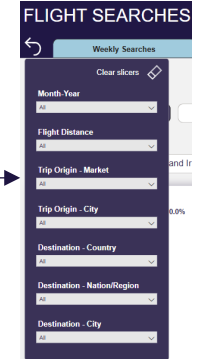
Additional data available on vb.org

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

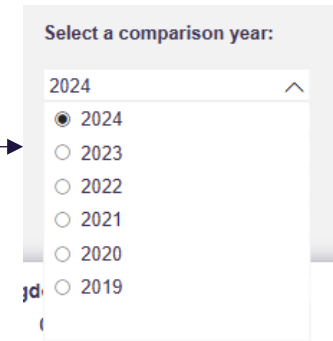
Click on the slicer icon in the top left of the dashboard. Select a 'Trip Origin' or 'Destination' filter to select the geography of your choice.



Multiple years of data

2019
2021
2022
2023
2024
2025

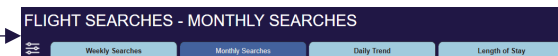
At the top of each tab you can select the year you want to show and the year you want to compare to.



View granular insights

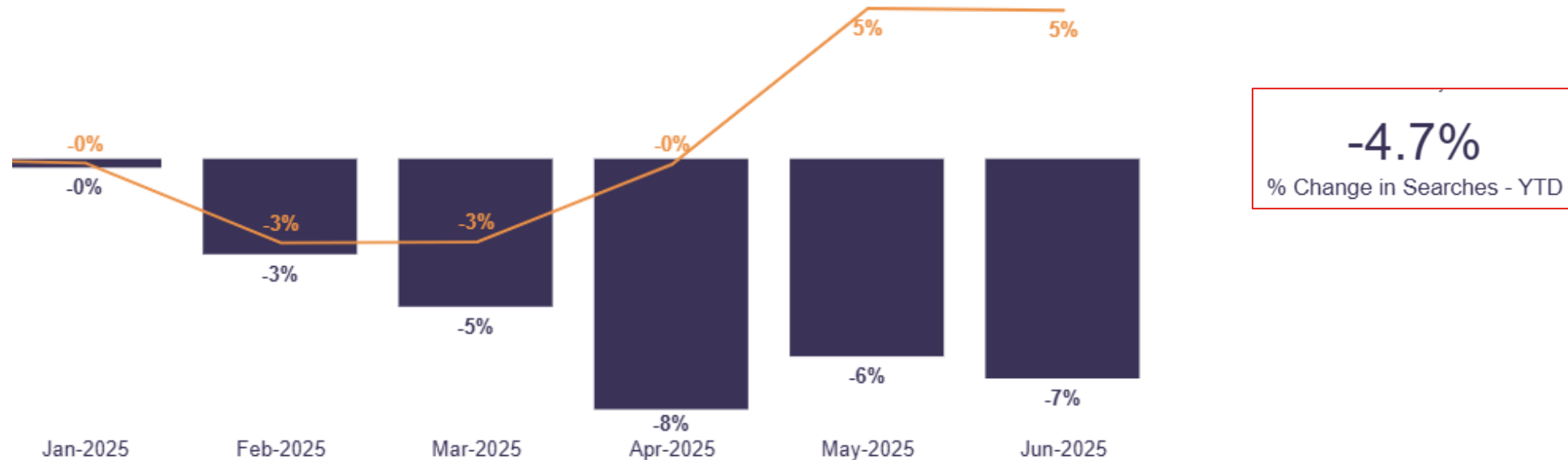
Daily Search Trends
Weekly Search Trends
Monthly Search trends
Length of stay Trends

Select the different tabs to view data at different date levels



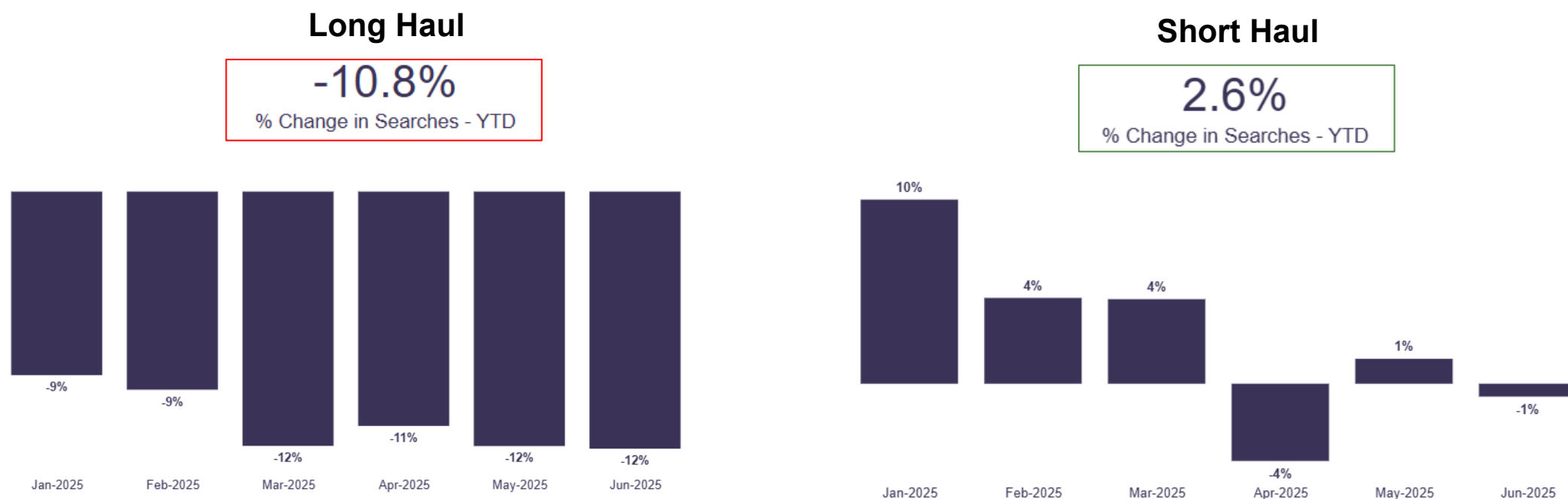
Flight search trends | Searches to the UK remained under 2024 levels in June 2025

- Flight searches to the UK* have remained below 2024 levels to a similar extent across the past 3 months, recording a 7% decline in June 2025 vs June 2024. Year-to-date (Jan-Jun), flight searches were down 5% vs the previous year.
- Searches to the Irish Republic remained above 2024 levels with the last two months reporting a 5% increase.



Flight search trends by LH and SH | Growth from SH markets ahead of LH markets

- Flight searches from long haul markets in June 2025 showed the same YoY dip as May at -12%. Searches from short haul markets saw a slight decline at -1% in June 2025 vs June 2024.
- Year-to-date (Jan-Jun 2025) searches from long haul markets were down 11% vs 2024 whilst searches from short haul markets were up 3% vs 2024.



Source: ForwardKeys Flight Searches refreshed 11/07/2025. % 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 within our subscription.

Origin market trends | Canada, Netherlands, Italy and Spain lead YoY growth in June

Market	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025	Jun-2025
Australia	-9%	-6%	-16%	-20%	-17%	-18%
Canada	-7%	-12%	-4%	-1%	2%	6%
China	12%	4%	-8%	-21%	-21%	-20%
France	3%	-3%	-1%	-11%	-2%	-6%
Germany	8%	3%	5%	-1%	5%	-1%
India	-5%	-6%	-17%	-3%	-14%	-14%
Italy	17%	13%	9%	-4%	-1%	1%
Netherlands	12%	6%	4%	2%	8%	2%
Norway	-9%	-9%	-6%	-8%	4%	-7%
Saudi Arabia	26%	10%	14%	17%	1%	-7%
Spain	13%	8%	7%	-5%	-2%	1%
Sweden	2%	-9%	-4%	-1%	8%	-1%
Switzerland	10%	4%	3%	-1%	1%	-1%
U.S.A.	-11%	-11%	-14%	-14%	-14%	-15%
United Arab Emirates	-1%	-2%	-2%	-16%	-10%	-7%

- Within our selected markets, June YoY growth was led by Canada (+6%), Netherlands (+2%), Italy (+1%) and Spain (+1%). All remaining markets saw declines vs the previous year.
- Within Europe, remaining markets saw gentler declines than other markets; Norway (-7%), France (-6%), Germany (-1%), Sweden (-1%) and Switzerland (-1%).
- Across long haul markets, China (-20%), Australia (-18%), the USA (-15%), India (-14%), Saudi Arabia (-7%) and the UAE (-7%) saw the largest declines compared to June 2024.

Source: ForwardKeys Flight Searches refreshed 11/07/2025. % 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 within our subscription.

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

- Flight searches to England remained below levels seen in the previous year at -11% in June 2025. All other UK nations surpassed 2024 levels; Scotland and Wales saw growth of 4%.
- Northern Ireland saw the highest growth vs the previous year at 37%, followed by UK Crown Dependencies at 14%.

Nation/Region	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025	Jun-2025
England	-4%	-5%	-8%	-10%	-9%	-11%
Scotland	9%	3%	3%	-2%	3%	4%
Wales	4%	-1%	5%	4%	9%	4%
Northern Ireland	34%	29%	27%	18%	33%	37%
UK Crown Dependencies	-5%	-5%	-8%	-3%	22%	14%

Source: ForwardKeys Flight Searches refreshed 11/07/2025. % growth vs previous year shown. Overall flight searches refer to the average of 15 inbound markets within our subscription.

Destination city trends | London accounts for around half of flight searches to the UK

- The destinations with the highest volume of searches in June 2025 were London, Edinburgh and Manchester.
- Tiree, Exeter, Belfast and Glasgow saw the highest YoY growth in June 2025.

City	Rank	Searches
London	1	4.7M
Edinburgh	2	1.6M
Manchester	3	1.1M
Glasgow	4	444.3K
Birmingham	5	423.8K
Bristol	6	223.1K
Liverpool	7	149.1K
Newcastle	8	131.9K
Belfast	9	122.9K
Leeds	10	105.7K
Cardiff	11	75.3K
Nottingham	12	72.8K
Inverness	13	69.1K
Aberdeen	14	58.6K
Southampton	15	54.9K

City	Rank	YoY % Change in Searches
Tiree, Inner Hebrides	1	48%
Exeter	2	41%
Belfast	3	41%
Glasgow	4	31%
Humberside	5	25%
Jersey	6	23%
Shetland Islands	7	20%
Barra	8	15%
Bournemouth	9	15%
Nottingham	10	10%
Newquay	11	8%
Guernsey	12	7%
Kirkwall	13	7%
Dundee	14	6%
Durham Tees Valley	15	6%

Source: ForwardKeys Flight Searches refreshed 11/07/2025. % growth vs previous year shown. Overall flight searches refer to the average of 15 inbound markets within our subscription.

For more information, please contact

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