

ForwardKeys Flight Searches Monthly Update Data up to August 2025

VisitBritain/VisitEngland Research
(Published September 2025)

Key takeouts

The story: travel demand to the UK saw a strong YoY growth in summer 2025, driven by long haul markets.

- The demand for the UK, measured by flight searches x the number of passengers searched for, saw strong growth in July and August 2025, but weaker trends earlier in the year has driven lower year-to-date growth figures (2%).
- Growth from long haul markets was up 28% in August 2025, led by Saudi Arabia, Canada, the UAE and the USA.
- Short haul markets saw more moderate growth, up 6% in August 2025 with Spain, Switzerland and Sweden as the top growth markets.
- Long haul markets were ahead of short haul when looking at YTD; 5% vs -2%.
- For a competitor view, the UK saw higher growth than the Irish Republic in August 2025.
- Growth by nations was led by Northern Ireland, Scotland and England, while Wales saw a sharp decline in August 2025 vs the previous year.
- Edinburgh and Glasgow were the top growth destinations amongst the top 5 ranking cities in the UK in August.

Please note a minor adjustment has been made to the methodology used for measuring flight searches, so some figures (absolute and growth) may vary slightly from previously reported data.

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. Repeated searches across different platforms are present in the data.
- Data is available from 2019 to present day with a 2 week lag.
- The measure of 'searches' within the report and dashboard is based on a calculation of the number of searches which took place x the number of passengers included within each search (i.e. travel party size), giving us an estimation of the total potential demand for the destinations.
- The origin and destination refers to the location of the airport being searched for rather than where the search is being made from.
- Data can be analysed by **destination** at the UK/Irish Republic level as well as by UK nation and city level.
- 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**.
- This analysis only includes searches which include a stay in the UK or Irish Republic 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 10th September 2025.**

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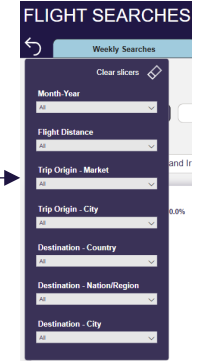
Additional data available on vb.org

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

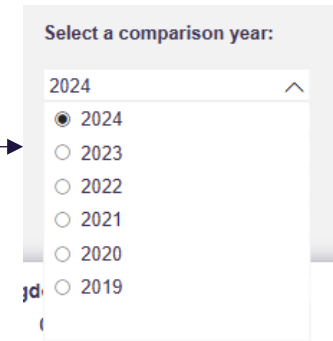
Click on the slicer icon in the top left of the dashboard. Select a 'Trip Origin' or 'Destination' filter to select the geography of your choice.



Multiple years of data

2019
2021
2022
2023
2024
2025

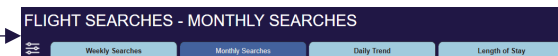
At the top of each tab you can select the year you want to show and the year you want to compare to.



View granular insights

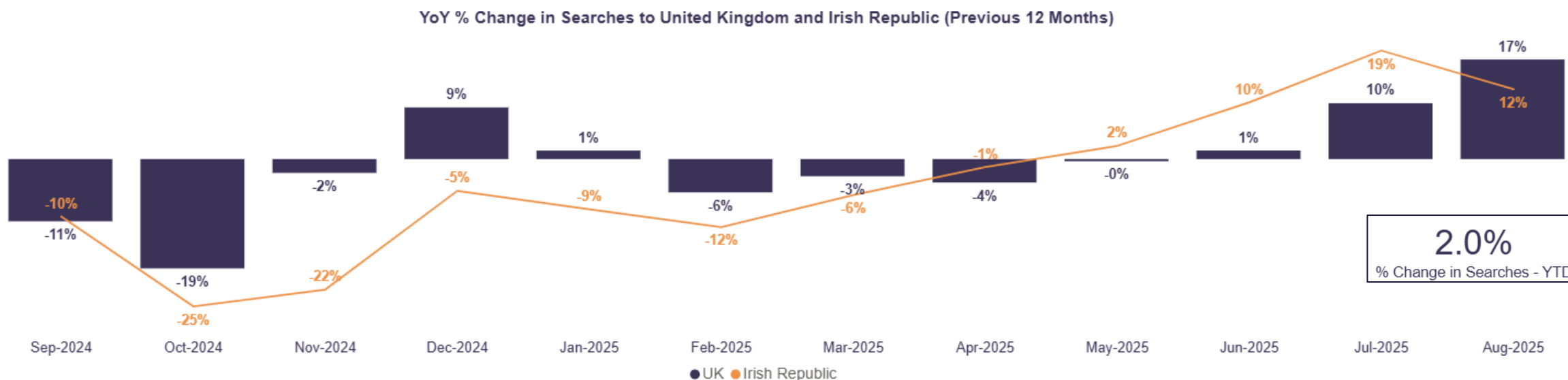
Daily Search Trends
Weekly Search Trends
Monthly Search trends
Length of stay Trends

Select the different tabs to view data at different date levels



Flight search trends | Searches to the UK exceeded 2024 levels by 17% in August

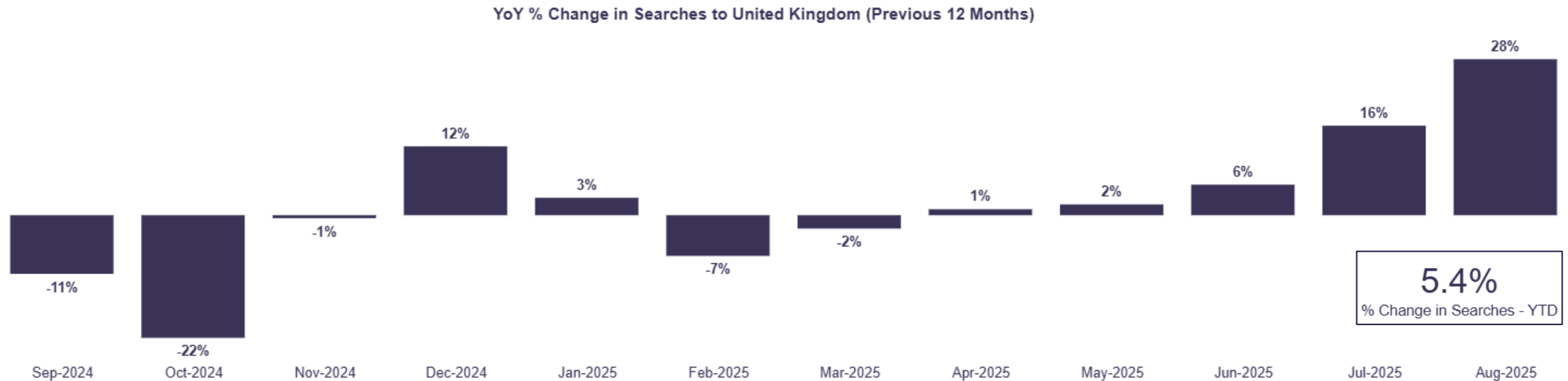
- Flight searches to the UK* picked up over the summer, and in August 2025 were 17% higher than the previous year. Weaker trends earlier in the year has driven lower year-to-date growth (Jan-Aug) which was 2% up vs 2024. It is also worth noting that searches during July and August 2024 were on par with 2023 so the growth seen this year is based on a weak 2024.
- The growth in searches to the Irish Republic tracked below the UK in August, after showing higher growth in the past 3 months, although remained above 2024 levels.



Source: ForwardKeys Flight Searches refreshed 10/09/25. % growth vs previous year shown. YTD may be different to the dashboard as the dashboard is updated weekly. *Overall flight searches refer to the average of 15 inbound markets within our subscription. Flight searches is a calculation of the number of searches which took place x the number of passengers included within each search (i.e. travel party size).

Long haul search trends | Strong YoY growth in July and August 2025

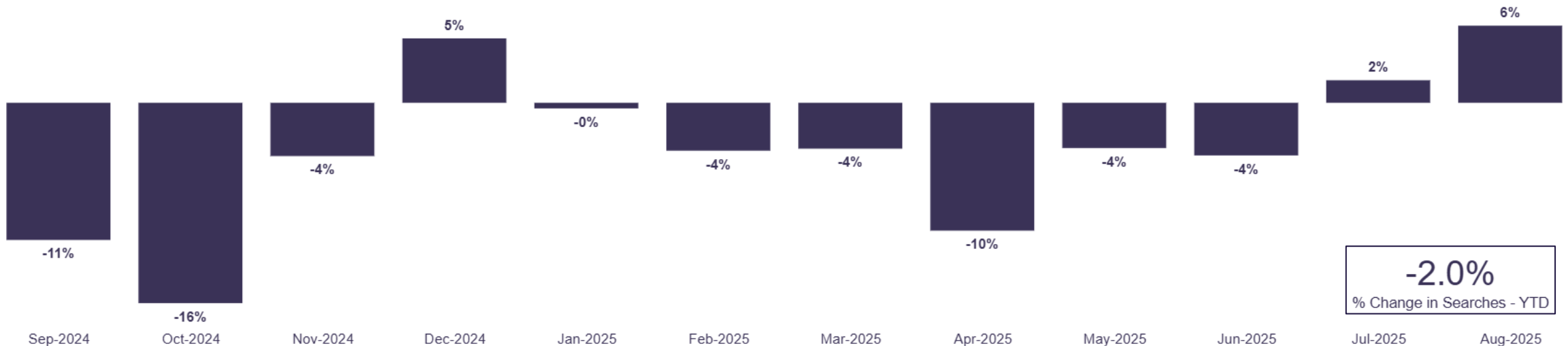
- Searches from long haul markets (USA, Australia, Canada, India, UAE, Saudi Arabia and China), showed strong year-on-year growth in July and August 2025, up 16% and 28%, respectively.
- Year-to-date searches (Jan-Aug) were up 5% vs the previous year for long haul markets.



Source: ForwardKeys Flight Searches refreshed 10/09/25. % growth vs previous year shown. YTD may be different to the dashboard as the dashboard is updated weekly. Overall flight searches refer to the average of 15 inbound markets within our subscription. Flight searches is a calculation of the number of searches which took place x the number of passengers included within each search (i.e. travel party size).

Short haul search trends | Short haul behind LH but still showing YoY growth

- Searches from short haul markets (Spain, Germany, Italy, France, Netherlands, Sweden, Switzerland, and Norway) also showed year-on-year growth in July and August 2025 but were behind long haul markets. Searches were up 2% in July and 6% in August vs 2024.
- Short haul growth was behind long haul markets with year-to-date searches (Jan-Aug) showed a gentle decline of 2% vs 2024.



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Origin market trends | Saudi Arabia leads in August

| Market | Mar-2025 | Apr-2025 | May-2025 | Jun-2025 | Jul-2025 | Aug-2025 |
|----------------------|----------|----------|----------|----------|----------|----------|
| Australia | -6% | -12% | -10% | -12% | -15% | -0% |
| Canada | 17% | 30% | 30% | 30% | 32% | 53% |
| China | 1% | -12% | -12% | -6% | -14% | 3% |
| France | -9% | -20% | 2% | -6% | -6% | -0% |
| Germany | -7% | -11% | -10% | -5% | 4% | 6% |
| India | -12% | 2% | -13% | 20% | -12% | 3% |
| Italy | 5% | -6% | 1% | 0% | 4% | 8% |
| Netherlands | -24% | -22% | -6% | -20% | -24% | -19% |
| Norway | -11% | -3% | 1% | -13% | -16% | -5% |
| Saudi Arabia | 35% | 42% | 48% | 28% | 50% | 100% |
| Spain | 7% | -7% | -7% | 1% | 16% | 17% |
| Sweden | -11% | 11% | 3% | -9% | -6% | 10% |
| Switzerland | -2% | 2% | 4% | 4% | 16% | 17% |
| U.S.A. | -6% | -3% | -0% | -1% | 24% | 30% |
| United Arab Emirates | 6% | -12% | 1% | 15% | 11% | 33% |

Latest month: August 2025 vs August 2024:

- Strong YoY growth was led by Saudi Arabia where searches were double what was seen the previous year, followed by Canada, the UAE and the USA.
- Spain, Switzerland and Sweden also saw growth in the double digits.
- Moderate growth was seen from Italy, Germany, China and India.
- Searches were on par from Australia and France.
- Norway saw gentle declines whilst the Netherlands saw a larger YoY decline in August 2025.

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Destination nation trends | Strong growth for NI, Scotland and England

- Searches to Northern Ireland led YoY growth in August 2025 (+32%), followed by Scotland (+24%) and England (+16%).
- Searches to Wales were down by around a quarter in August 2025, after a couple months of gentle declines. The crown dependencies saw a gentle decline in searches during August 2025.

| Nation/Region | Jan-2025 | Feb-2025 | Mar-2025 | Apr-2025 | May-2025 | Jun-2025 | Jul-2025 | Aug-2025 |
|-----------------------|----------|----------|----------|----------|----------|----------|----------|----------|
| England | 2% | -5% | -3% | -3% | -1% | 1% | 7% | 16% |
| Scotland | -2% | -8% | -2% | -9% | 1% | 6% | 23% | 24% |
| Wales | -20% | -28% | -19% | -8% | 19% | -2% | -5% | -26% |
| Northern Ireland | 20% | 12% | 15% | 5% | 23% | 31% | 36% | 32% |
| UK Crown Dependencies | -18% | -20% | -23% | -19% | 12% | 10% | -0% | -9% |

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Destination city trends | Strongest growth from Scottish cities within the top 5

- Top ranking UK destinations in August 2025 were London, Edinburgh, Manchester, Glasgow and Birmingham, with Glasgow and Edinburgh seeing the largest growth within the top 5.
- Overall, Humberside, Glasgow, Belfast, Exeter and Edinburgh saw the largest YoY growth in August 2025.

| City | Rank | UK |
|-------------|------|--------|
| London | 1 | 22.1M |
| Edinburgh | 2 | 4.5M |
| Manchester | 3 | 2.3M |
| Glasgow | 4 | 789.2K |
| Birmingham | 5 | 760.5K |
| Bristol | 6 | 376.8K |
| Liverpool | 7 | 326.2K |
| Newcastle | 8 | 236.2K |
| Belfast | 9 | 215.9K |
| Leeds | 10 | 176.0K |
| Inverness | 11 | 118.0K |
| Nottingham | 12 | 109.3K |
| Cardiff | 13 | 107.9K |
| Aberdeen | 14 | 97.3K |
| Southampton | 15 | 73.7K |

| City | Rank | UK |
|----------------------------|------|-----|
| Humberside | 1 | 48% |
| Glasgow | 2 | 41% |
| Belfast | 3 | 36% |
| Exeter | 4 | 25% |
| Edinburgh | 5 | 25% |
| Islay | 6 | 21% |
| London | 7 | 19% |
| Nottingham | 8 | 15% |
| Newcastle | 9 | 14% |
| Newquay | 10 | 9% |
| Liverpool | 11 | 8% |
| Stornoway, Outer Stat H... | 12 | 7% |
| Manchester | 13 | 6% |
| Birmingham | 14 | 4% |
| Shetland Islands | 15 | 3% |

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For more information, please contact

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