

# **Amadeus Air Traffic Trends Monthly Update** **Data up to July 2025**

VisitBritain/VisitEngland Research

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# About this data

These slides show data from Amadeus Air Traffic showing an estimation of the total number of air passengers travelling to the UK from key source markets. Data shown is for passengers to/within the UK.

## *Some notes on this data:*

- The data model for Air Traffic integrates bookings, schedules, public statistics, and airport official statistics. Amadeus monitors the accuracy of their data to ensure that it remains above 90% for each market.
- Inbound within the report refers to a sum of 9 key source markets; Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA. There is also data referring to the UK/domestic market. Our analysis excludes UK travellers returning to the UK from other destinations.
- Data is available from 2019 and up to 6 months ahead of the most recent reporting month.
- Data up to **July 2025** is shown in this report and the data was extracted on 27/08/2025. Going forward, the latest data will be released at a monthly cadence and has a lag time of 1 month.
- Please do not re-publish data from this report on any public platform, including combining the data with that from other sources, before contacting VisitBritain/VisitEngland for approval.

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## July 2025 | Inbound air traffic to the UK displaying 2% growth in the year to date

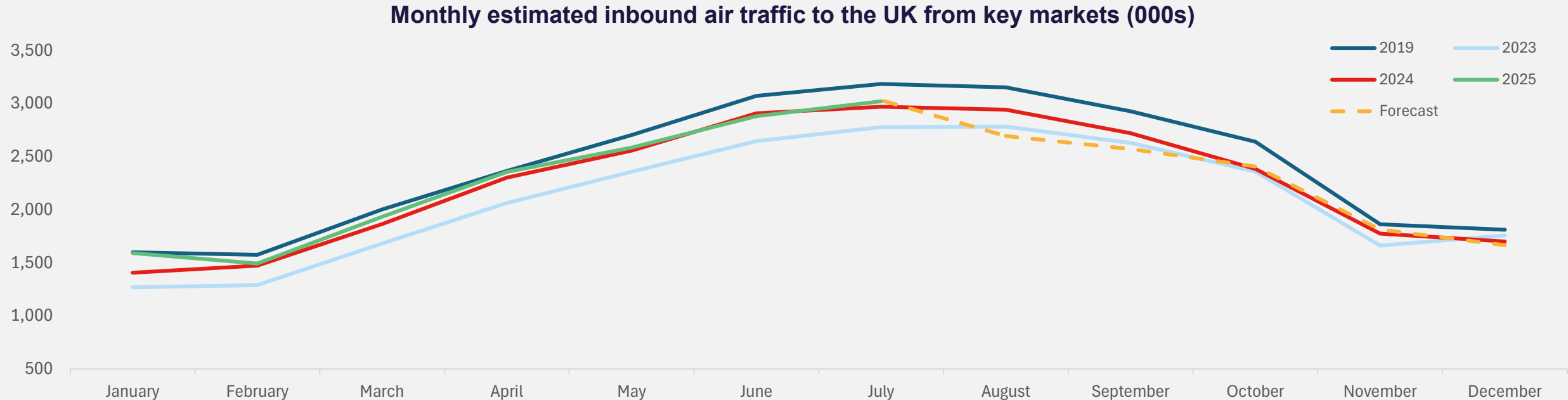
- In July, inbound traffic to the UK was **2% higher** than what was seen in the same month in 2024; stronger than June's 1% year on year decline. Total year on year growth in the year to date for 2025 is also 2%.
- Within 2025, inbound traffic to the UK **has exceeded 2024 and 2023 levels** on average but still falls short of 2019. Forecasts predict poorer performance for August and September.
- Both inbound and domestic air traffic in the UK has seen year on year growth, with **short haul markets** seeing the strongest growth on average in the year to date.
- Amongst the top cities for air traffic **Liverpool** is seeing the most year on year growth. Amongst all UK cities, Durham, Bournemouth and Newquay demonstrate the strongest growth within July post-COVID.

Notes: Amadeus air traffic data refreshed 27/08/2025. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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# Inbound air traffic trends (volume) | 2025 generally exceeding 2024 and 2023 levels of traffic, but falling short of 2019



- In 2025 so far, inbound air traffic to the UK has generally exceeded 2024 and 2023 levels but fallen short of 2019 levels. The exception to this was in June 2025 where traffic dropped below 2024 levels by 1%.
- All years demonstrate a consistent seasonal pattern, with traffic peaking in the summer months.
- Forecasts for the rest of 2025 predict that inbound traffic will see year on year declines in August and September, before exceeding 2024 levels in October and November, and dipping once again in December.

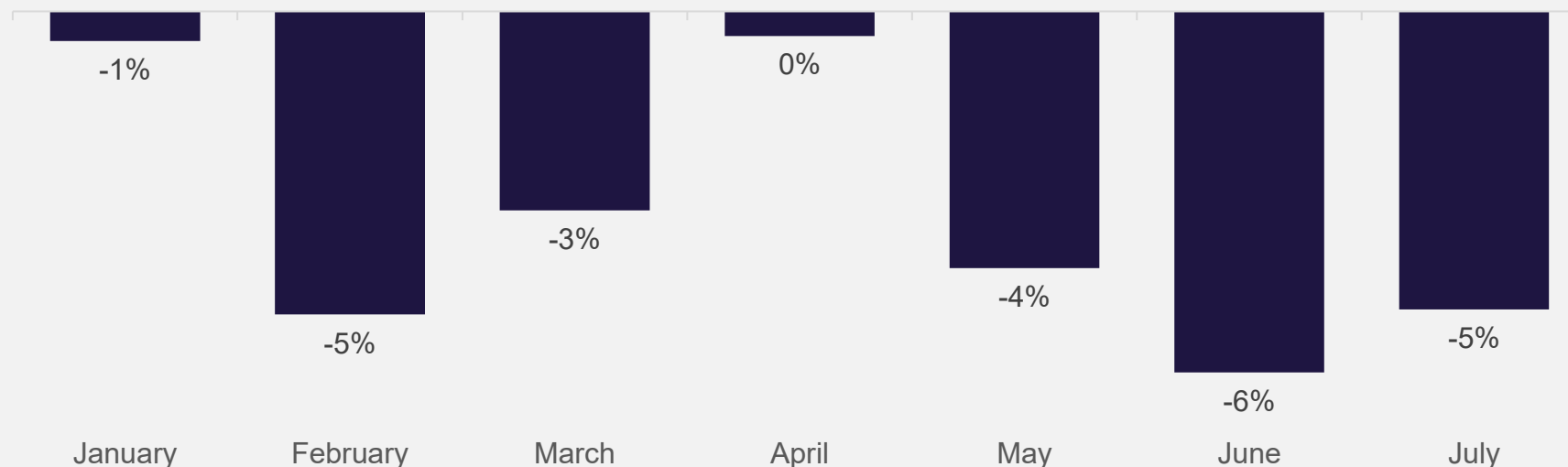
Notes: Amadeus air traffic data refreshed 27/08/2025. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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# Inbound air traffic vs. pre-COVID | Air traffic to the UK seeing sustained declines vs. 2019

Monthly estimated inbound air traffic from key markets in current year vs. 2019



Year-to-date  
2025 vs 2019  
-4%

- Inbound traffic to the UK has been below 2019 levels throughout 2025 so far, apart from in April where volumes were matched between years. The closest months to 2019 performance so far were January and April.

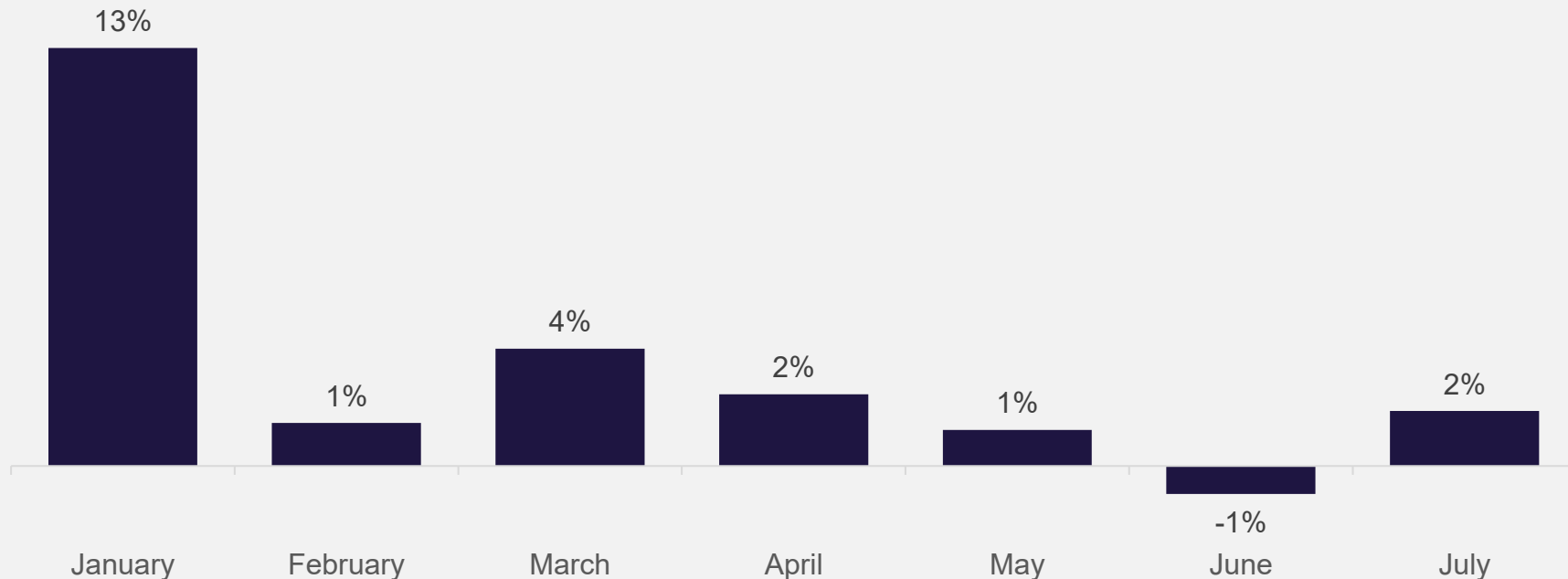
Notes: Amadeus air traffic data refreshed 27/08/2025. % growth vs. 2019 shown. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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# Inbound air traffic vs. 2024 | The UK seeing year on year growth in 2025 so far apart from in June

Monthly estimated inbound air traffic from key markets in current year vs. 2024



Year-to-date  
2025 vs 2024  
2%

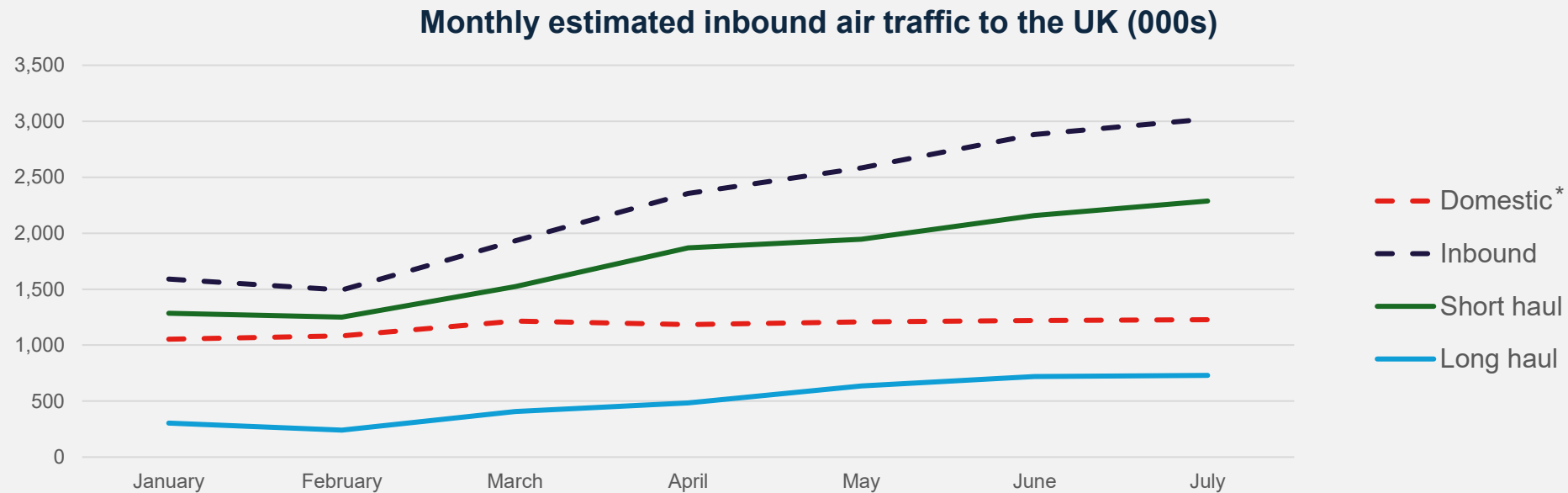
- When comparing 2025 so far with 2024, the UK has seen increased volumes of inbound air traffic apart from in June, which saw a 1% decline. The strongest month in 2025 so far was January, which saw 13% growth.

Notes: Amadeus air traffic data refreshed 27/08/2025. % growth vs. 2024 shown. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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## Origin market trends (volume) | Short haul and long haul traffic steadily increasing from March onwards



- Inbound air traffic has consistently seen a larger volume of air traffic vs. domestic, with inbound air traffic increasing steadily from March onwards, as domestic air traffic remained relatively level.
- After a slow start to 2025 both short haul and long haul markets have begun to see a slight upturn in air traffic from March onwards.

Notes: Amadeus air traffic data refreshed 27/08/2025. Inbound, short haul, and long haul are shown as averages to support the visual display of the data. The short haul total includes air traffic from France, Germany, Italy, Netherlands and Spain. The long haul total includes air traffic from Australia, Canada, Saudi Arabia, and the USA. \*Domestic air traffic includes UK residents travelling within the UK, and may include foreign visitors who travel domestically with a break in between their arrival to the UK of more than 24 hours

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# Origin market trends vs. pre-COVID | Saudi Arabia has seen the most growth in air traffic to the UK in 2025 compared to 2019

## Monthly estimated inbound air traffic in 2025 vs. 2019

	Domestic*	Inbound	Short haul	Long haul	Australia	Canada	Germany	Spain	France	Italy	Neth.	Saudi Arabia	USA
January	-11%	-1%	-4%	18%	20%	3%	-26%	10%	8%	-8%	-26%	130%	12%
February	-9%	-5%	-7%	5%	1%	-8%	-31%	6%	7%	-5%	-29%	119%	2%
March	-9%	-3%	-6%	6%	2%	3%	-27%	8%	-5%	-4%	-26%	59%	6%
April	-12%	0%	-4%	17%	4%	3%	-19%	2%	-1%	1%	-24%	131%	17%
May	-14%	-4%	-7%	7%	5%	-3%	-20%	-4%	-1%	3%	-34%	177%	5%
June	-9%	-6%	-9%	3%	-9%	-9%	-18%	-7%	-2%	-1%	-33%	60%	4%
July	-11%	-5%	-9%	11%	-6%	-3%	-16%	-7%	-5%	-3%	-34%	76%	13%
Year to date	-11%	-4%	-7%	9%	0%	-3%	-22%	-1%	-1%	-2%	-30%	96%	8%

- Within 2025 so far, the volume of inbound air traffic has been closer to 2019 levels compared to domestic traffic (-4% on average vs. -11% for the year to date).
- Among international origin markets, long haul markets are seeing a growth in volumes of air traffic compared to 2019, whereas short haul markets remain on average 7% below 2019 within the year so far. Saudi Arabia demonstrates the highest year on year growth in air traffic, peaking in May 2025 at 177%.

Notes: Amadeus air traffic data refreshed 27/08/2025. % growth vs. 2019 shown. The short haul total includes air traffic from France, Germany, Italy, Netherlands and Spain. The long haul total includes air traffic from Australia, Canada, Saudi Arabia, and the USA. \*Domestic air traffic includes UK residents travelling within the UK, and may include foreign visitors who travel domestically with a break in between their arrival to the UK of more than 24 hours

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# Origin market trends vs. 2024 | Both domestic and inbound seeing year on year growth on average, with Saudi Arabia once again standing out

## Monthly estimated inbound air traffic in 2025 vs. 2024

	Domestic*	Inbound	Short haul	Long haul	Australia	Canada	Germany	Spain	France	Italy	Neth.	Saudi Arabia	USA
January	-8%	13%	12%	17%	25%	-1%	15%	8%	18%	14%	17%	19%	19%
February	7%	1%	2%	0%	-7%	-8%	1%	-1%	6%	5%	4%	-8%	4%
March	8%	4%	6%	-3%	-8%	-5%	0%	5%	5%	12%	8%	12%	-2%
April	6%	2%	2%	5%	10%	6%	10%	-1%	1%	5%	2%	21%	3%
May	0%	1%	2%	-1%	2%	-5%	1%	-2%	4%	15%	-1%	33%	-3%
June	5%	-1%	3%	-10%	-9%	-8%	3%	0%	7%	11%	-4%	1%	-11%
July	0%	2%	1%	5%	-1%	5%	4%	-2%	-1%	7%	-3%	14%	5%
Year to date	2%	2%	3%	0%	0%	-2%	5%	0%	5%	10%	3%	12%	0%

- On average within 2025 so far, both domestic and inbound air traffic has exceeded 2024 levels. Within inbound air traffic, short haul markets have exceeded 2024 levels by 3% in the year to date, compared to long haul remaining level year on year.
- Among long haul markets, Saudi Arabia sees the strongest growth in air traffic compared to 2024, again peaking in May. Australia also saw a significant peak of 25% growth in January.

Notes: Amadeus air traffic data refreshed 27/08/2025. % growth vs. 2024 shown. The short haul total includes air traffic from France, Germany, Italy, Netherlands and Spain. The long haul total includes air traffic from Australia, Canada, Saudi Arabia, and the USA. \*Domestic air traffic includes UK residents travelling within the UK, and may include foreign visitors who travel domestically with a break in between their arrival to the UK of more than 24 hours

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## Destination city trends | London, Manchester, and Edinburgh leading cities for inbound air traffic in July, but Liverpool seeing stronger growth

Year on year growth in air traffic for top ranked UK cities in July 2025

	London	Manchester	Edinburgh	Birmingham	Bristol	Glasgow	Leeds	Liverpool	Nottingham	Newcastle upon Tyne
January	16%	9%	19%	10%	3%	12%	39%	26%	-22%	14%
February	2%	-2%	9%	-4%	-4%	3%	8%	25%	-26%	10%
March	5%	1%	6%	-7%	3%	-10%	24%	23%	-13%	20%
April	5%	8%	3%	-7%	-9%	-6%	-7%	13%	-18%	-1%
May	3%	0%	3%	-7%	-8%	-7%	0%	2%	-5%	-1%
June	-1%	-4%	4%	-1%	3%	-10%	3%	19%	-7%	1%
July	5%	-5%	7%	-12%	-1%	-14%	-3%	10%	4%	-13%
Year to date	4%	0%	6%	-5%	-2%	-7%	4%	14%	-10%	1%

Top growing cities in July vs. 2019

City	% change
Durham	245%
Bournemouth	104%
Newquay	76%
Shetland Islands	72%
Stornoway	41%
Kirkwall	34%
Edinburgh	14%
Islay	13%
Bristol	2%
London	-2%

- In July 2025, the top ranked UK cities by air traffic were London, Manchester and Edinburgh. When examining the year-on-year growth in air traffic of the top ranked cities, in the year-to-date Liverpool has seen the most growth at 14%, followed by Edinburgh (6%) and London (4%). Nottingham is seeing 10% less air traffic in 2025 so far than in 2024, with Glasgow and Birmingham also seeing declines.
- Looking at cities which have received the most growth in inbound air traffic in July 2025 vs. 2019, Durham ranks first, followed by Bournemouth and Newquay.

Notes: Amadeus air traffic data refreshed 27/08/2025. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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