

ForwardKeys Flight Searches Monthly Update Data up to September 2025

VisitBritain/VisitEngland Research
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Key takeouts

The story: travel demand to the UK saw a strong YoY growth in September, driven by long haul markets, although worth noting that searches were on par with 2023 at the total level.

- The demand for the UK, measured by flight searches x the number of passengers searched for, saw continued strong growth in September 2025, but weaker trends earlier in the year have driven lower year-to-date growth figures (3%).
- Growth from long haul markets was at 20% in September 2025, led by Saudi Arabia, Canada, the UAE and China. Short haul markets saw more moderate growth (+8%), with Italy and Spain as the top growth markets.
- Long haul markets were ahead of short haul when looking at YTD growth; 7% vs 0%.
- For a competitor view, the UK saw similar growth to the Irish Republic in September 2025.
- Growth by nations was led by Northern Ireland, Scotland and England, while Wales and the Crown Dependencies saw moderate declines in September 2025 vs 2024.
- Glasgow and Edinburgh were the top growth destinations amongst the top 5 ranking cities in the UK in September.

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 of the global market and please note that 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 13th October 2025.**

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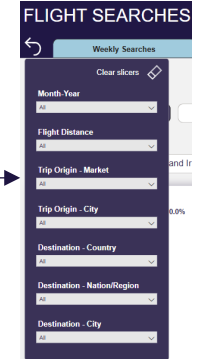
Additional data available on vb.org

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

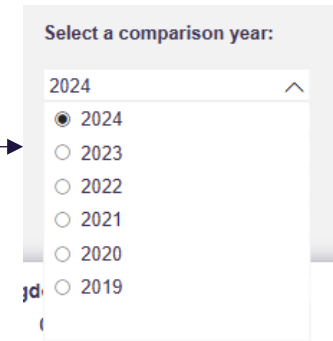
Click on the slicer icon in the top left of the dashboard. Select a 'Trip Origin' or 'Destination' filter to select the geography of your choice.



Multiple years of data

2019
2021
2022
2023
2024
2025

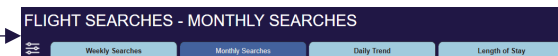
At the top of each tab you can select the year you want to show and the year you want to compare to.



View granular insights

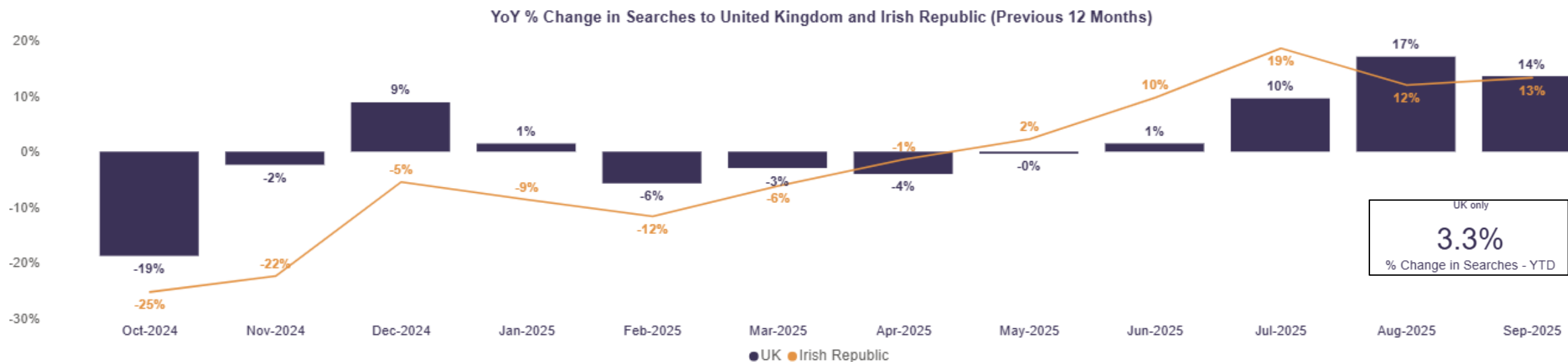
Daily Search Trends
Weekly Search Trends
Monthly Search trends
Length of stay Trends

Select the different tabs to view data at different date levels



Flight search trends | Searches to the UK continue YoY growth into September

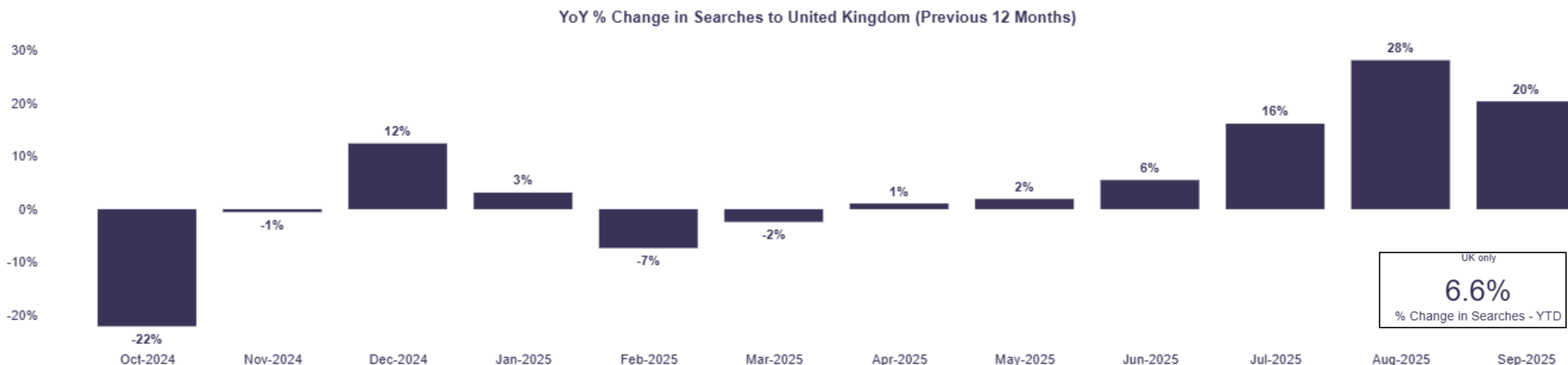
- Flight searches to the UK continued to track above 2024 levels and were up 14% YoY in September 2025. Weaker trends earlier in the year have driven lower year-to-date growth (Jan-Sep) which was 3% up vs 2024. It is worth noting 2024 was a weaker year and 2025 searches are on par with 2023.
- The growth in searches to the Irish Republic tracked 1 percentage point lower than the UK for growth in September 2025.



Source: ForwardKeys Flight Searches refreshed 13/10/25. % 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 September growth for long haul markets in aggregate

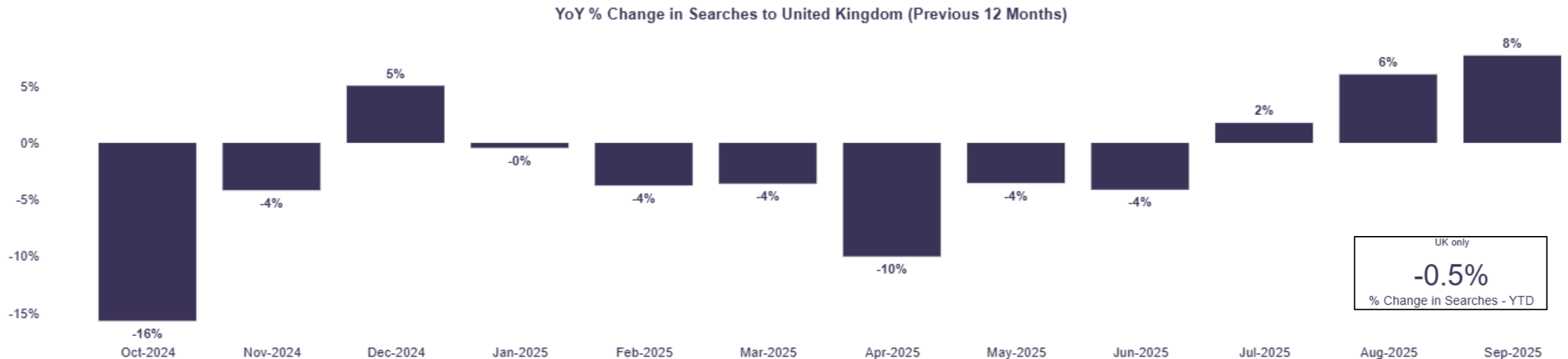
- Searches from long haul markets in aggregate (USA, Australia, Canada, India, UAE, Saudi Arabia and China), showed strong year-on-year growth September 2025, up 20%.
- Year-to-date searches (Jan-Sep) were up 7% vs the previous year for long haul markets.



Source: ForwardKeys Flight Searches refreshed 13/10/25. % 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 showing growth in September but down YTD

- Searches from short haul markets (Spain, Germany, Italy, France, Netherlands, Sweden, Switzerland, and Norway) also showed moderate year-on-year growth (up 8%) in September 2025 but were behind long haul markets.
- Year-to-date searches (Jan-Sep) were on par with the previous year.



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Origin market trends | Gulf markets, Canada and China lead September growth

Market	Apr-2025	May-2025	Jun-2025	Jul-2025	Aug-2025	Sep-2025
Australia	-12%	-10%	-12%	-15%	-0%	-4%
Canada	30%	30%	30%	32%	53%	51%
China	-12%	-12%	-6%	-14%	3%	35%
France	-20%	2%	-6%	-6%	-0%	-9%
Germany	-11%	-10%	-5%	4%	6%	7%
India	2%	-13%	20%	-12%	3%	-6%
Italy	-6%	1%	0%	4%	8%	24%
Netherlands	-22%	-6%	-20%	-24%	-19%	-12%
Norway	-3%	1%	-13%	-16%	-5%	-13%
Saudi Arabia	42%	48%	28%	50%	100%	62%
Spain	-7%	-7%	1%	16%	17%	18%
Sweden	11%	3%	-9%	-6%	10%	6%
Switzerland	2%	4%	4%	16%	17%	8%
U.S.A.	-3%	-0%	-1%	24%	30%	21%
United Arab Emirates	-12%	1%	15%	11%	33%	37%

Latest month: September 2025 vs September 2024:

- Strongest YoY growth was led by Saudi Arabia, Canada, the UAE and China (likely due to searches for Golden week which falls in October). It is worth noting that the Gulf markets were also up on 2023 whereas the other 3 growth markets were on par.
- Italy, USA and Spain also saw YoY growth in the double digits.
- Moderate growth was seen from Switzerland, Germany and Sweden.
- YoY declines were seen from Norway, Netherlands, France and Australia in September 2025.

Source: ForwardKeys Flight Searches refreshed 13/10/25. % 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). Penetration of flight searches is higher in Europe and North America, and low in Asian markets.

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

- Searches to Northern Ireland led YoY growth in September 2025 (+44%), followed by Scotland (+22%) and England (+12%).
- Searches to Wales were down 7% and to the Crown Dependencies were down 6%.

Nation/Region	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025	Jun-2025	Jul-2025	Aug-2025	Sep-2025
England	2%	-5%	-3%	-3%	-1%	1%	7%	16%	12%
Scotland	-2%	-8%	-2%	-9%	1%	6%	23%	24%	22%
Wales	-20%	-28%	-19%	-8%	19%	-2%	-5%	-26%	-7%
Northern Ireland	20%	12%	15%	5%	23%	31%	36%	32%	44%
UK Crown Dependencies	-18%	-20%	-23%	-19%	12%	10%	-0%	-9%	-6%

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

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

City	Rank	Searches
London	1	23.1M
Edinburgh	2	4.7M
Manchester	3	2.5M
Glasgow	4	840.4K
Birmingham	5	787.5K
Bristol	6	434.0K
Liverpool	7	368.0K
Newcastle	8	264.2K
Belfast	9	234.2K
Leeds	10	185.0K
Inverness	11	135.6K
Nottingham	12	112.5K
Cardiff	13	111.1K
Aberdeen	14	99.9K
Southampton	15	67.4K

City	Rank	YoY % Change in Searches
Belfast	1	48%
Glasgow	2	44%
Exeter	3	38%
Newcastle	4	25%
Edinburgh	5	22%
London	6	15%
Durham Tees Valley	7	13%
Shetland Islands	8	12%
Humberside	9	12%
Bristol	10	7%
Norwich	11	5%
Inverness	12	3%
Nottingham	13	2%
Newquay	14	1%
Jersey	15	1%

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For more information, please contact

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