

# **Amadeus Air Traffic Trends Monthly Update Data up to September 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 **September 2025** is shown in this report and the data was extracted on 28/10/2025. 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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# September 2025 | Inbound air traffic to the UK displaying stronger year-on-year growth towards the end of the third quarter

- In September, inbound traffic to the UK was **3% higher** than what was seen in the same month in 2024; the strongest month within 2025 since March. Total year-on-year growth in the year-to-date for 2025 was 2%.
- Within 2025, inbound traffic to the UK **has exceeded 2024 and 2023 levels** on average but still falls short of 2019. Forecasts predict stronger performance from October to December.
- Both inbound and domestic air traffic in the UK has seen year-on-year growth, with **short haul markets** seeing stronger growth than long haul markets on average in the year-to-date.
- Amongst the top UK cities for inbound air traffic **Liverpool, Edinburgh** and **London** are seeing the most year-on-year growth. Amongst all UK cities, Durham, Newquay, and the Shetland Islands demonstrate the strongest growth within September compared to 2019.

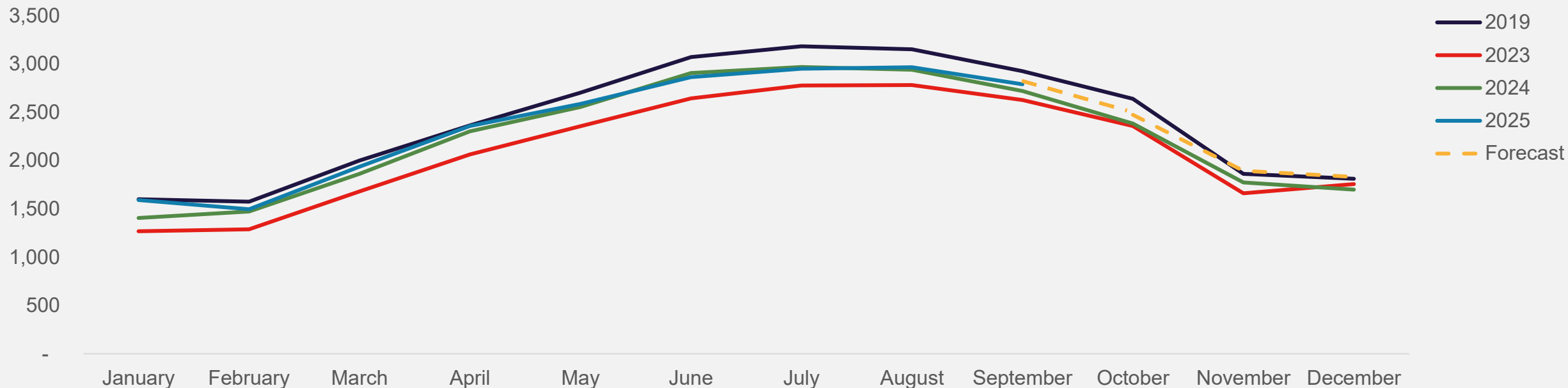
Notes: Amadeus air traffic data refreshed 28/10/2025. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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

Monthly estimated inbound air traffic to the UK from key markets (000s)



- 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 and July 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 exceed 2024 levels for the rest of the year, with growth accelerating each month (up 4% in October and up 8% in December).

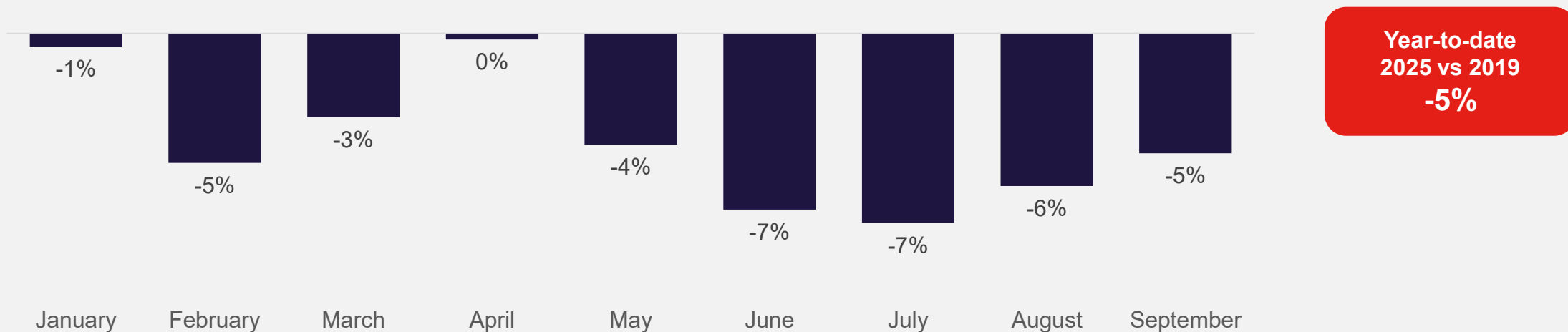
Notes: Amadeus air traffic data refreshed 28/10/2025. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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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



- 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.

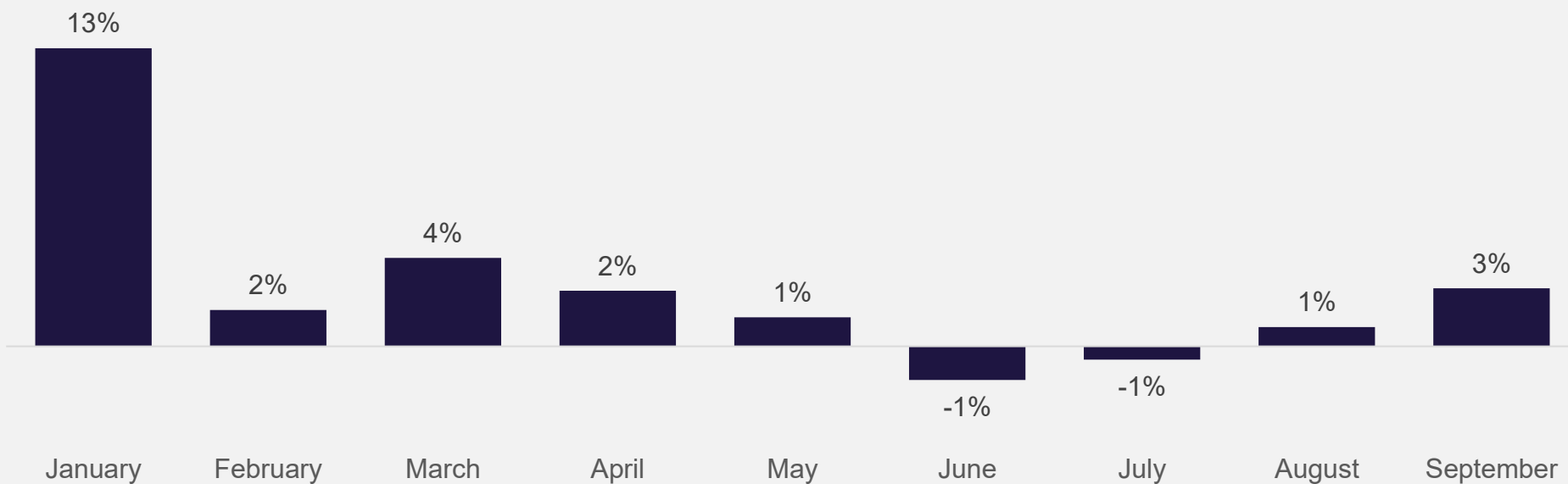
Notes: Amadeus air traffic data refreshed 28/10/2025. % growth vs. 2019 shown. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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

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



Year-to-date  
2025 vs 2024  
2%

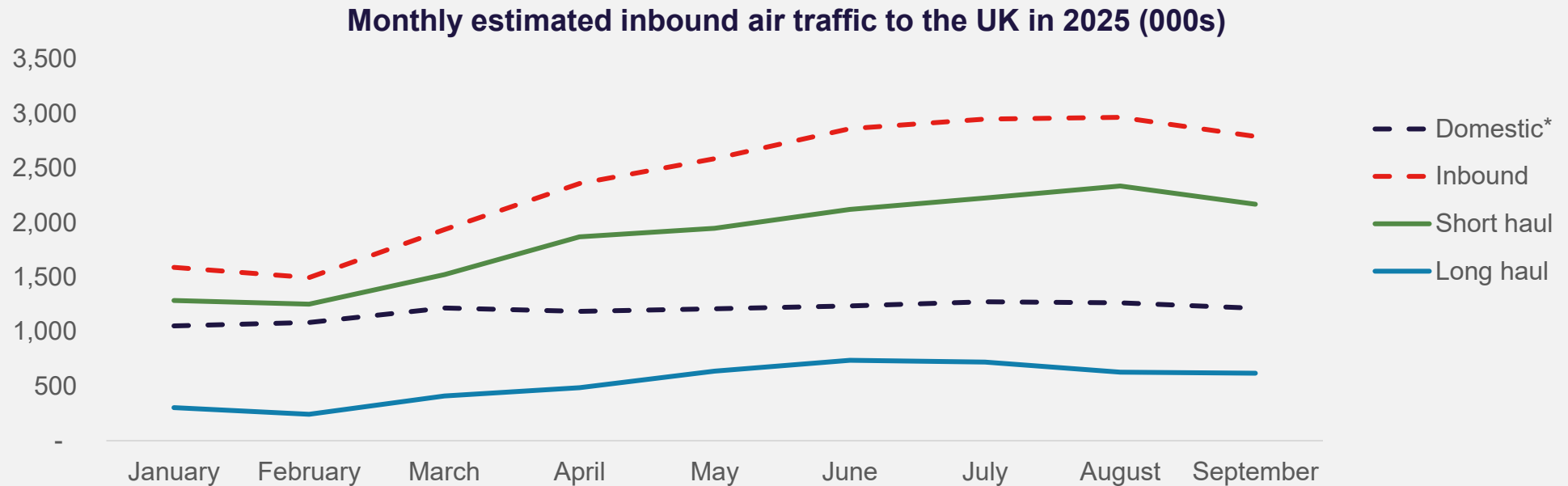
- When comparing 2025 so far with 2024, the UK has seen increased volumes of inbound air traffic apart from in June and July, which saw a 1% decline. The strongest month in 2025 so far was January, which saw 13% growth.

Notes: Amadeus air traffic data refreshed 28/10/2025. % 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 28/10/2025. 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%     | -6%        | 5%        | 3%        | -8%    | -31%    | 6%    | 7%     | -5%   | -29%  | 122%         | 2%  |
| March        | -9%       | -3%     | -6%        | 7%        | 3%        | 3%     | -27%    | 8%    | -5%    | -4%   | -26%  | 59%          | 6%  |
| April        | -11%      | 0%      | -4%        | 18%       | 5%        | 3%     | -19%    | 2%    | -1%    | 1%    | -23%  | 131%         | 17% |
| May          | -14%      | -4%     | -7%        | 7%        | 5%        | -2%    | -20%    | -4%   | -1%    | 3%    | -33%  | 178%         | 6%  |
| June         | -8%       | -7%     | -10%       | 5%        | -7%       | -8%    | -18%    | -9%   | -2%    | -1%   | -34%  | 61%          | 7%  |
| July         | -8%       | -7%     | -11%       | 10%       | -7%       | -3%    | -17%    | -11%  | -4%    | -4%   | -33%  | 75%          | 11% |
| August       | -8%       | -6%     | -9%        | 7%        | -4%       | 3%     | -18%    | -9%   | 1%     | 2%    | -33%  | 57%          | 7%  |
| September    | -7%       | -5%     | -8%        | 11%       | -12%      | -5%    | -16%    | -6%   | -3%    | -3%   | -32%  | 101%         | 15% |
| Year-to-date | -10%      | -5%     | -8%        | 9%        | -2%       | -2%    | -21%    | -4%   | 0%     | -2%   | -30%  | 90%          | 9%  |

- Within 2025 so far, the volume of inbound air traffic has been closer to 2019 levels compared to domestic traffic (-5% on average vs. -10% for the year-to-date).
- Among international origin markets, long haul markets are seeing a growth in volumes of air traffic compared to 2019 (9%) mainly driven by the growth in the US market, whereas short haul markets remain on average 8% below 2019 within the year so far. Saudi Arabia demonstrates the highest year-on-year growth in air traffic, peaking in May 2025 at 178%.

Notes: Amadeus air traffic data refreshed 28/10/2025. % 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%        | 2%      | 2%         | 1%        | -5%       | -8%    | 2%      | -1%   | 6%     | 5%    | 4%    | -7%          | 4%  |
| March        | 8%        | 4%      | 6%         | -2%       | -7%       | -5%    | 0%      | 5%    | 5%     | 12%   | 9%    | 13%          | -2% |
| April        | 6%        | 2%      | 2%         | 6%        | 10%       | 7%     | 10%     | -1%   | 1%     | 5%    | 3%    | 21%          | 4%  |
| May          | 1%        | 1%      | 2%         | -1%       | 2%        | -4%    | 1%      | -2%   | 4%     | 15%   | 0%    | 33%          | -2% |
| June         | 6%        | -1%     | 1%         | -8%       | -7%       | -7%    | 3%      | -3%   | 6%     | 11%   | -6%   | 1%           | -9% |
| July         | 4%        | -1%     | -2%        | 4%        | -2%       | 5%     | 4%      | -7%   | 1%     | 6%    | -2%   | 14%          | 4%  |
| August       | 4%        | 1%      | 2%         | -2%       | -2%       | 4%     | 11%     | -3%   | 2%     | 10%   | 7%    | 23%          | -4% |
| September    | 5%        | 3%      | 4%         | -3%       | -13%      | 0%     | 15%     | 1%    | 7%     | 9%    | -2%   | 10%          | -2% |
| Year-to-date | 4%        | 2%      | 2%         | 0%        | -2%       | 0%     | 7%      | -1%   | 5%     | 9%    | 3%    | 14%          | -1% |

- 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 2% 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 28/10/2025. % 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 vs. 2024 | London, Manchester, and Edinburgh leading cities for inbound air traffic in September, but Liverpool seeing stronger growth

Year-on-year change in air traffic for top ranked UK cities in 2025 vs. 2024

|              | London | Manchester | Edinburgh | Birmingham | Bristol | Glasgow | Liverpool | Leeds | Newcastle Upon Tyne | Nottingham |
|--------------|--------|------------|-----------|------------|---------|---------|-----------|-------|---------------------|------------|
| January      | 16%    | 9%         | 19%       | 10%        | 3%      | 12%     | 26%       | 39%   | 14%                 | -22%       |
| February     | 2%     | -2%        | 9%        | -4%        | -4%     | 2%      | 25%       | 9%    | 9%                  | -26%       |
| March        | 5%     | 1%         | 6%        | -7%        | 3%      | -10%    | 23%       | 24%   | 20%                 | -13%       |
| April        | 5%     | 8%         | 3%        | -7%        | -9%     | -6%     | 13%       | -7%   | -1%                 | -18%       |
| May          | 4%     | 0%         | 2%        | -7%        | -8%     | -7%     | 2%        | 0%    | -1%                 | -5%        |
| June         | 0%     | -6%        | 3%        | -4%        | -1%     | -12%    | 19%       | 3%    | -4%                 | -12%       |
| July         | 3%     | -8%        | 8%        | -15%       | -6%     | -14%    | 5%        | -5%   | -16%                | -4%        |
| August       | 4%     | -6%        | 11%       | -8%        | 1%      | -12%    | 10%       | -8%   | -13%                | -16%       |
| September    | 5%     | -3%        | 11%       | -4%        | 1%      | -2%     | 6%        | -11%  | -1%                 | -4%        |
| Year-to-date | 4%     | -2%        | 7%        | -6%        | -2%     | -8%     | 12%       | -1%   | -2%                 | -12%       |

Top growing cities in September vs. 2019

| City             | % change |
|------------------|----------|
| Durham           | 152%     |
| Newquay          | 104%     |
| Shetland Islands | 73%      |
| Bournemouth      | 69%      |
| Islay            | 61%      |
| Stornoway        | 37%      |
| Kirkwall         | 35%      |
| Edinburgh        | 30%      |
| Liverpool        | 16%      |
| Leeds            | 1%       |

- In September 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 12%, followed by Edinburgh (7%) and London (4%). Nottingham is seeing 12% less air traffic in 2025 so far than in 2024, with Glasgow, Birmingham, Bristol, Manchester, Newcastle and Leeds also seeing declines.
- Looking at cities which have saw the most growth in inbound air traffic in September 2025 vs. 2019, Durham ranks first, followed by Newquay and the Shetland Islands.

Notes: Amadeus air traffic data refreshed 28/10/2025. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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