

ForwardKeys Flight Searches Monthly Update Data up to October 2025

VisitBritain/VisitEngland Research
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Key takeouts

The story: travel demand to the UK saw strong YoY growth in October, led by Italy, Canada and Spain. It is worth noting that 2024 was a weaker year and searches have been around on par with 2023 levels across the last five months.

- The demand for the UK, measured by flight searches x the number of passengers searched for, saw continued strong growth in October 2025, but weaker trends earlier in the year have driven lower year-to-date growth figures (6%).
- Growth from long haul markets was at 18% in October 2025 led by Canada, Saudi Arabia, the UAE and China. Short haul markets saw a surge in demand with YoY searches up 34% led by Italy and Spain.
- However, long haul markets were ahead of short haul when looking at YTD growth; 7% vs 4%.
- For a competitor view, the UK was slightly ahead of the Irish Republic for growth in October 2025.
- October growth by nations was led by England followed closely by Scotland and Wales in joint second.
- London and Edinburgh were the top growth destinations amongst the top 5 ranking cities in the UK in October.

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 11th November 2025.**

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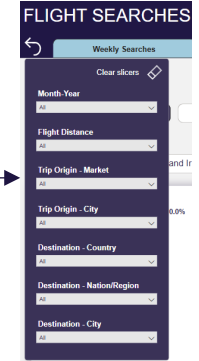
Additional data available on vb.org

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

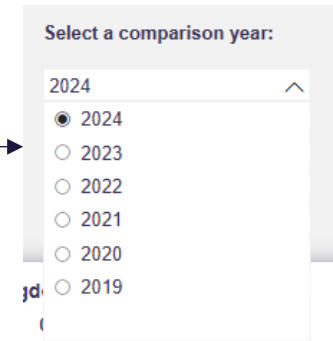
Click on the slicer icon in the top left of the dashboard. Select a 'Trip Origin' or 'Destination' filter to select the geography of your choice.



Multiple years of data

2019
2021
2022
2023
2024
2025

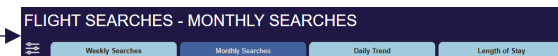
At the top of each tab you can select the year you want to show and the year you want to compare to.



View granular insights

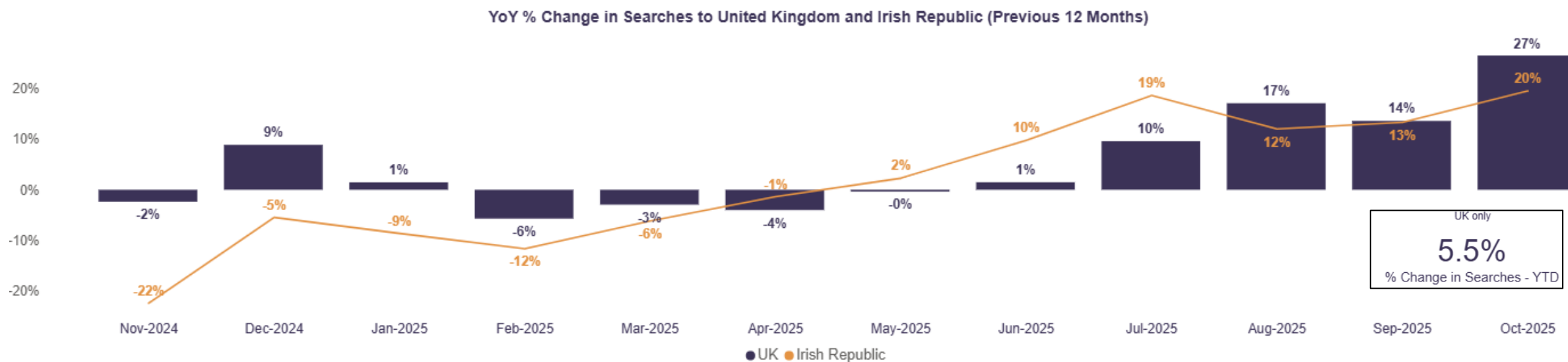
Daily Search Trends
Weekly Search Trends
Monthly Search trends
Length of stay Trends

Select the different tabs to view data at different date levels



Flight search trends | Continued YoY growth into October 2025

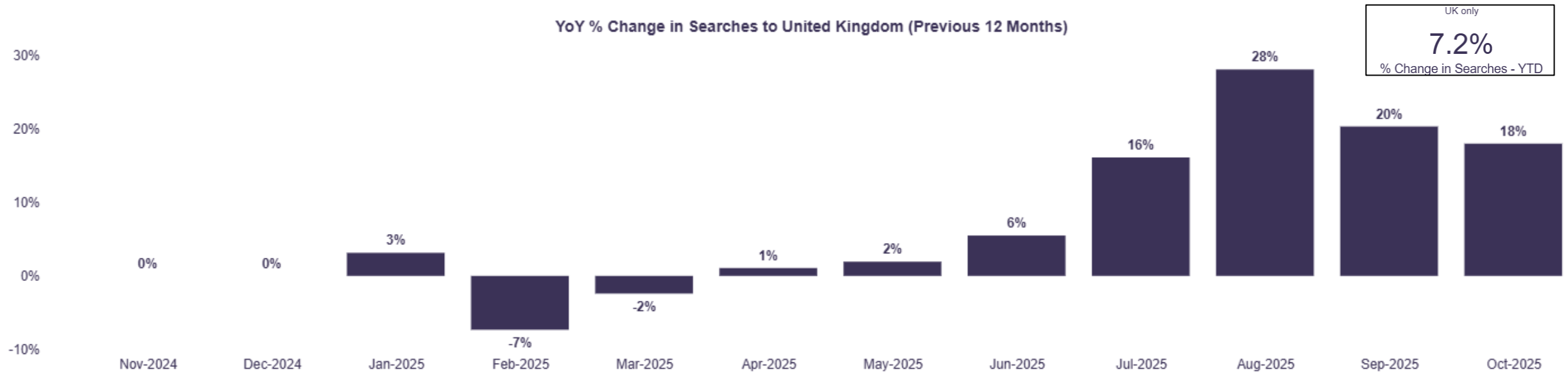
- Flight searches to the UK continued to track above 2024 levels and were up 27% YoY in October 2025. Weaker trends earlier in the year have driven lower year-to-date growth (Jan-Oct) which was 6% up vs 2024. It is worth noting 2024 was a weaker year and 2025 searches have been similar to 2023 levels over the past 5 months.
- The growth in searches to the Irish Republic tracked 7 percentage points lower than the UK for growth in October 2025.



Source: ForwardKeys Flight Searches refreshed 11/11/25. % 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 | Continued YoY growth for long haul markets in aggregate

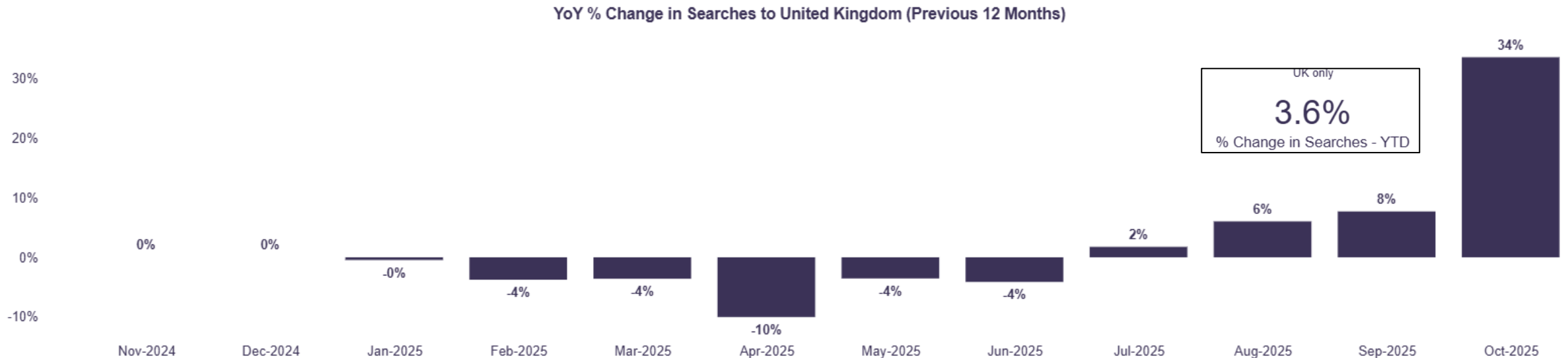
- Searches from long haul markets in aggregate (USA, Australia, Canada, India, UAE, Saudi Arabia and China), showed strong year-on-year growth in October 2025, up 18%.
- Year-to-date searches (Jan-Oct) were up 7% vs the previous year for selected long haul markets.



Source: ForwardKeys Flight Searches refreshed 11/11/25. % 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 | Huge surge in demand from short haul markets

- Searches from short haul markets (Spain, Germany, Italy, France, Netherlands, Sweden, Switzerland, and Norway) also showed high YoY growth, up 34% overall led by huge growth in Italy and Spain. Growth for these two markets is being driven by the national holiday in December and the peak Christmas travel period.
- Year-to-date searches (Jan-Oct) were up 4% for short haul markets in aggregate.



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Origin market trends | Italy, Canada and Spain lead October growth

Market	May-2025	Jun-2025	Jul-2025	Aug-2025	Sep-2025	Oct-2025
Australia	-10%	-12%	-15%	-0%	-4%	-12%
Canada	30%	30%	32%	53%	51%	66%
China	-12%	-6%	-14%	3%	35%	28%
France	2%	-6%	-6%	-0%	-9%	5%
Germany	-10%	-5%	4%	6%	7%	7%
India	-13%	20%	-12%	3%	-6%	-15%
Italy	1%	0%	4%	8%	24%	95%
Netherlands	-6%	-20%	-24%	-19%	-12%	-2%
Norway	1%	-13%	-16%	-5%	-13%	-5%
Saudi Arabia	48%	28%	50%	100%	62%	40%
Spain	-7%	1%	16%	17%	18%	58%
Sweden	3%	-9%	-6%	10%	6%	-5%
Switzerland	4%	4%	16%	17%	8%	8%
U.S.A.	-0%	-1%	24%	30%	21%	18%
United Arab Emirates	1%	15%	11%	33%	37%	35%

Latest month: October 2025 vs October 2024:

- Strongest YoY growth led by Italy, Canada and Spain.
- Saudi Arabia, UAE, China and the USA also saw double digit growth for October.
- Moderate growth was seen from Switzerland, Germany and France.
- Gentle declines were seen from Netherlands, Norway and Sweden with larger declines from Australia and India.

Source: ForwardKeys Flight Searches refreshed 11/11/25. % growth vs previous year shown. %s 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 England, Scotland and Wales in October

- England (28%) led YoY growth in October 2025 followed closely by Scotland (22%) and Wales (22%).
- Northern Ireland saw a slowdown in growth in October to 5%, after five months of strong double digit growth.

Nation/Region	Nov-2024	Dec-2024	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025	Jun-2025	Jul-2025	Aug-2025	Sep-2025	Oct-2025
England	-0%	11%	2%	-5%	-3%	-3%	-1%	1%	7%	16%	12%	28%
Scotland	-11%	0%	-2%	-8%	-2%	-9%	1%	6%	23%	24%	22%	22%
Wales	-25%	-20%	-20%	-28%	-19%	-8%	19%	-2%	-5%	-26%	-7%	22%
Northern Ireland	-16%	27%	20%	12%	15%	5%	23%	31%	36%	32%	44%	5%
UK Crown Dependencies	-25%	-11%	-18%	-20%	-23%	-19%	12%	10%	-0%	-9%	-6%	-7%

Source: ForwardKeys Flight Searches refreshed 11/11/25. % growth vs previous year shown. %s 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 searches x number of passengers searched for.

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

- Top ranking UK destinations by volume in October 2025 were London, Edinburgh, Manchester, Glasgow and Birmingham, with London and Edinburgh seeing the largest YoY growth within the top 5 cities.
- Overall, Wick*, Exeter, Humberside, Shetland Islands and London saw the largest YoY search growth in October 2025.

City	Rank	Searches
London	1	25.8M
Edinburgh	2	4.6M
Manchester	3	2.6M
Glasgow	4	843.8K
Birmingham	5	818.9K
Bristol	6	497.6K
Liverpool	7	321.4K
Newcastle	8	269.3K
Belfast	9	232.0K
Leeds	10	162.3K
Cardiff	11	131.1K
Inverness	12	106.7K
Aberdeen	13	92.6K
Nottingham	14	90.8K
Southampton	15	67.8K

City	Rank	YoY % Change in Searches
Wick	1	61%
Exeter	2	49%
Humberside	3	41%
Shetland Islands	4	37%
London	5	32%
Edinburgh	6	28%
Newcastle	7	22%
Cardiff	8	22%
Bristol	9	21%
Glasgow	10	11%
Bournemouth	11	10%
Manchester	12	10%
Belfast	13	6%
Durham Tees Valley	14	6%
Birmingham	15	0%

Source: ForwardKeys Flight Searches refreshed 11/11/25. % growth vs previous year shown. %s 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 searches x number of passengers searched for.*YoY searches based on a low volume of searches.

For more information, please contact

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