

ForwardKeys Flight Searches Monthly Update Data up to November 2025

VisitBritain/VisitEngland Research
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If you would like the data in a different format, please contact research@visitbritain.org

Key takeouts

The story: Demand for the UK saw a slight decline in November with short haul outpacing long haul demand. Growth was led Italy, Canada and China from our selected inbound markets.

- The demand for the UK, measured by flight searches x the number of passengers searched for, saw a YoY decline in November 2025 (-2%) with year-to-date demand up 4%.
- Long haul markets in aggregate saw a YoY decline of 12% after seven months of growth although double digit growth was seen from Canada and China. Short haul markets saw gentler YoY growth in November (9%) vs October, led by strong growth from Italy followed by more moderate growth from Spain, France, Switzerland and Germany.
- However, long haul markets were ahead of short haul when looking at year-to-date growth (Jan-Nov); 5% vs 3%.
- For a competitor view, the Irish Republic saw stronger YoY growth vs the UK in November (11% vs -2%).
- November growth by nations was led by Wales and Scotland.
- Edinburgh and Manchester were the top growth destinations amongst the top 5 ranking cities in the UK in November.

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 8th December 2025.**

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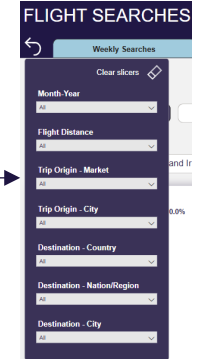
Additional data available on vb.org

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

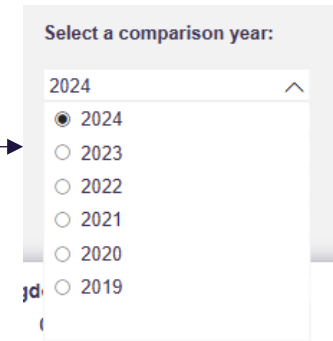
Click on the slicer icon in the top left of the dashboard. Select a 'Trip Origin' or 'Destination' filter to select the geography of your choice.



Multiple years of data

2019
2021
2022
2023
2024
2025

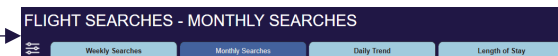
At the top of each tab you can select the year you want to show and the year you want to compare to.



View granular insights

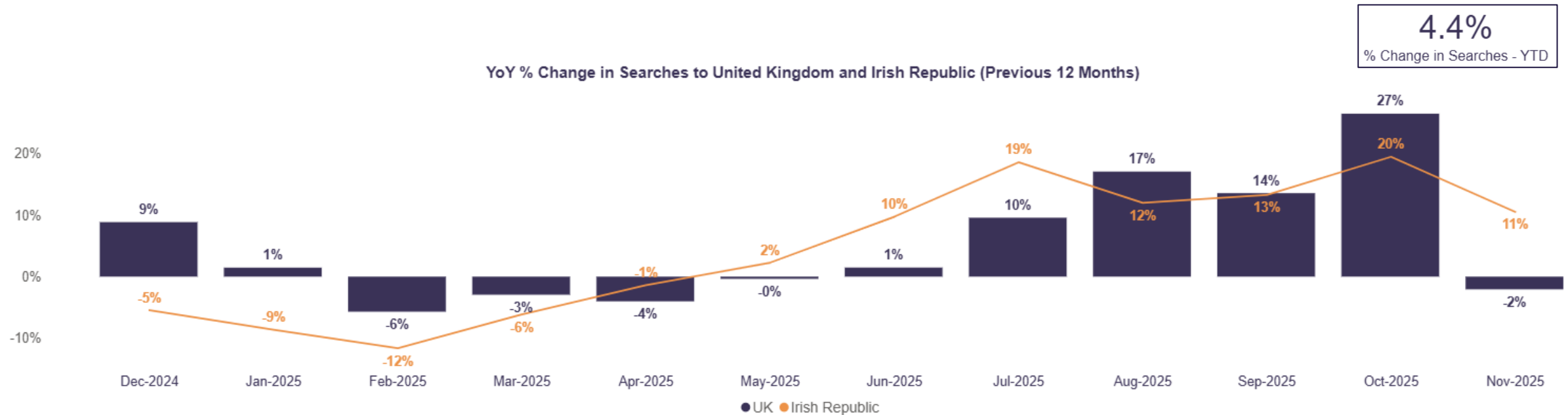
Daily Search Trends
Weekly Search Trends
Monthly Search trends
Length of stay Trends

Select the different tabs to view data at different date levels



Flight search trends | Overall flight searches declined YoY in November 2025

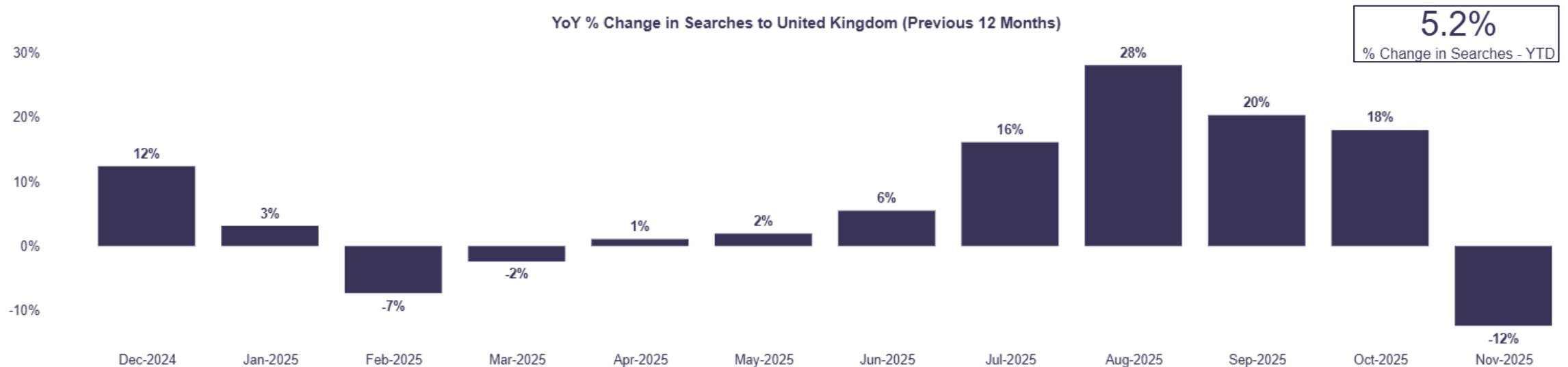
- Overall flight searches to the UK saw a decline in November 2025 (-2%) after five months of growth. Year-to-date demand (Jan-Nov) for the UK was up 4% YoY.
- Searches to the Irish Republic were up 11% YoY in November 2025, seeing higher growth than the UK.



Source: ForwardKeys Flight Searches refreshed 08/12/2025. % 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 | Long haul in aggregate saw YoY declines

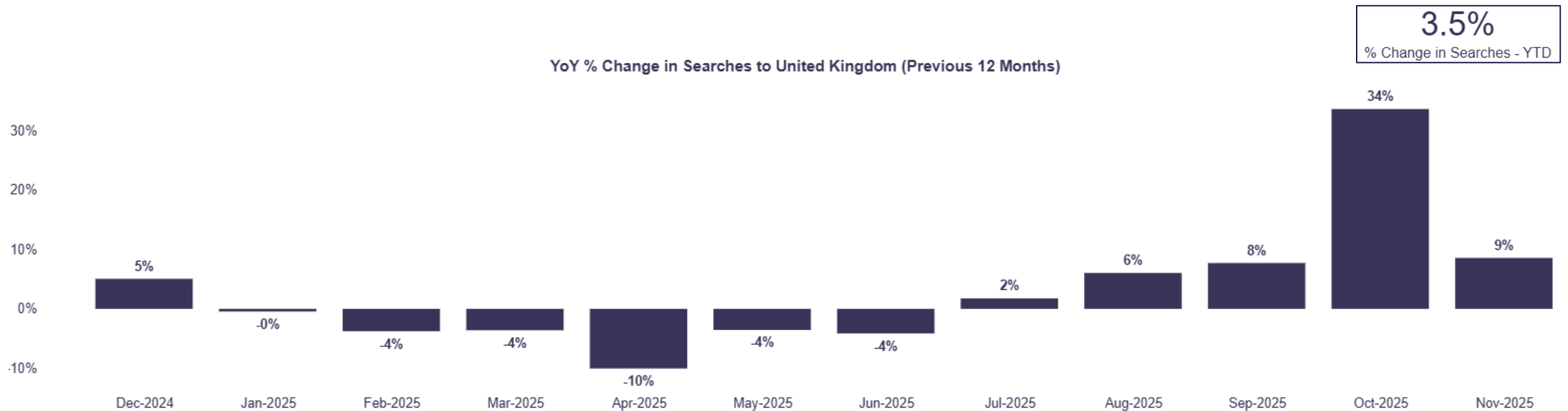
- Searches from long haul markets in aggregate (USA, Australia, Canada, India, UAE, Saudi Arabia and China), showed a YoY decline of 12% in November 2025.
- Year-to-date searches (Jan-Nov) were up 5% vs the previous year for selected long haul markets.



Source: ForwardKeys Flight Searches refreshed 08/12/2025. % 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 | Growth from short haul markets continues

- Searches from short haul markets (Spain, Germany, Italy, France, Netherlands, Sweden, Switzerland, and Norway) saw continued growth into November 2025 albeit a slowdown from the previous month.
- Year-to-date searches (Jan-Nov) were up 3% for short haul markets in aggregate.



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Origin market trends | Italy, Canada and China led November growth

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

Latest month: November 2025 vs November 2024:

- Strongest YoY growth for flight searches to the UK was led by Italy, Canada and China.
- More moderate single digit growth was seen from Spain, France, Switzerland, Germany and the UAE.
- A slight decline in demand was seen from Sweden followed by Australia, Norway, Netherlands and India.
- Strongest YoY declines were seen from the USA and Saudi Arabia in November after months of strong YoY growth.

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Destination nation trends | Wales and Scotland led YoY growth in November

- Wales (17%) and Scotland (11%) led growth in November whilst England saw a slight decline in demand to -4%.
- Northern Ireland saw YoY declines for the first time this year (-16%), followed by the Crown Dependencies (-9%).

Nation/Region	Dec-2024	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025	Jun-2025	Jul-2025	Aug-2025	Sep-2025	Oct-2025	Nov-2025
England	11%	2%	-5%	-3%	-3%	-1%	1%	7%	16%	12%	28%	-4%
Scotland	0%	-2%	-8%	-2%	-9%	1%	6%	23%	24%	22%	22%	11%
Wales	-20%	-20%	-28%	-19%	-8%	19%	-2%	-5%	-26%	-7%	22%	17%
Northern Ireland	27%	20%	12%	15%	5%	23%	31%	36%	32%	44%	5%	-16%
UK Crown Dependencies	-11%	-18%	-20%	-23%	-19%	12%	10%	-0%	-9%	-6%	-7%	-9%

Source: ForwardKeys Flight Searches refreshed 08/12/2025. % 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 | Growth led by Scottish and SW England destinations

- Top ranking UK destinations by volume in November 2025 were London, Edinburgh, Manchester, Glasgow and Birmingham, with Edinburgh and Manchester seeing the largest YoY growth within the top 5 cities.
- Overall, Westray* and Eday* saw the largest YoY growth, followed by Exeter, Bristol, Cardiff and Edinburgh.

City	Rank	Searches
London	1	22.2M
Edinburgh	2	4.1M
Manchester	3	2.3M
Glasgow	4	791.3K
Birmingham	5	719.1K
Bristol	6	459.4K
Liverpool	7	301.5K
Newcastle	8	219.0K
Belfast	9	202.6K
Leeds	10	138.9K
Cardiff	11	124.3K
Inverness	12	104.1K
Nottingham	13	90.8K
Aberdeen	14	84.4K
Southampton	15	59.8K

City	Rank	YoY % Change in Searches
Westray	1	831%
Eday	2	750%
Exeter	3	63%
Bristol	4	18%
Cardiff	5	17%
Edinburgh	6	16%
Manchester	7	6%
Bournemouth	8	6%
Newcastle	9	5%
Isle Of Man	10	3%
Shetland Islands	11	3%
Newquay	12	2%
Humberside	13	0%
Glasgow	14	-0%
Birmingham	15	-1%

Source: ForwardKeys Flight Searches refreshed 08/12/2025. % 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. Destinations are based on UK airports.

For more information, please contact

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