

# **ForwardKeys Flight Searches Monthly Update Data up to December 2025**

VisitBritain/VisitEngland Research  
(Published January 2026)

*If you would like the data in a different format, please contact [research@visitbritain.org](mailto:research@visitbritain.org)*



# Key takeouts

**The story: December 2025 growth was led by searches from European markets. Demand for the UK overall in 2025 was on par with 2024. Long haul demand tracked down 5% whilst short haul markets tracked up 5% across the year.**

- The demand for the UK, measured by flight searches x the number of passengers searched for, saw a slight YoY decline in December 2025 (-1%). Overall demand in 2025 was on par with the previous year.
- Long haul markets in aggregate saw a YoY decline of 11% in December with Canada and Australia leading growth, and the USA and Saudi Arabia seeing large YoY declines. Short haul markets saw 10% growth in aggregate, led by strong growth from Italy, followed by France, Spain and Norway.
- For 2025 overall, searches from long haul markets tracked down 5% vs up 5% from short haul markets.
- For a competitor view, the Irish Republic saw stronger YoY growth vs the UK in December (16% vs -1%).
- December growth by nations was led by Scotland.
- Year-on-year growth by destination city was led by Scottish destinations and South West England airports.

# 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 20<sup>th</sup> January 2026.

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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

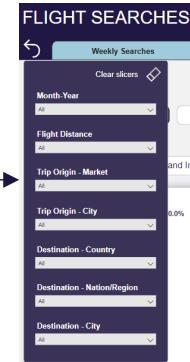
## Multiple years of data

2019  
2021  
2022  
2023  
2024  
2025

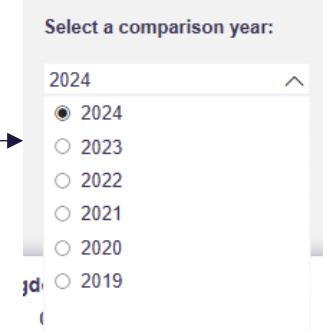
## View granular insights

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

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.



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

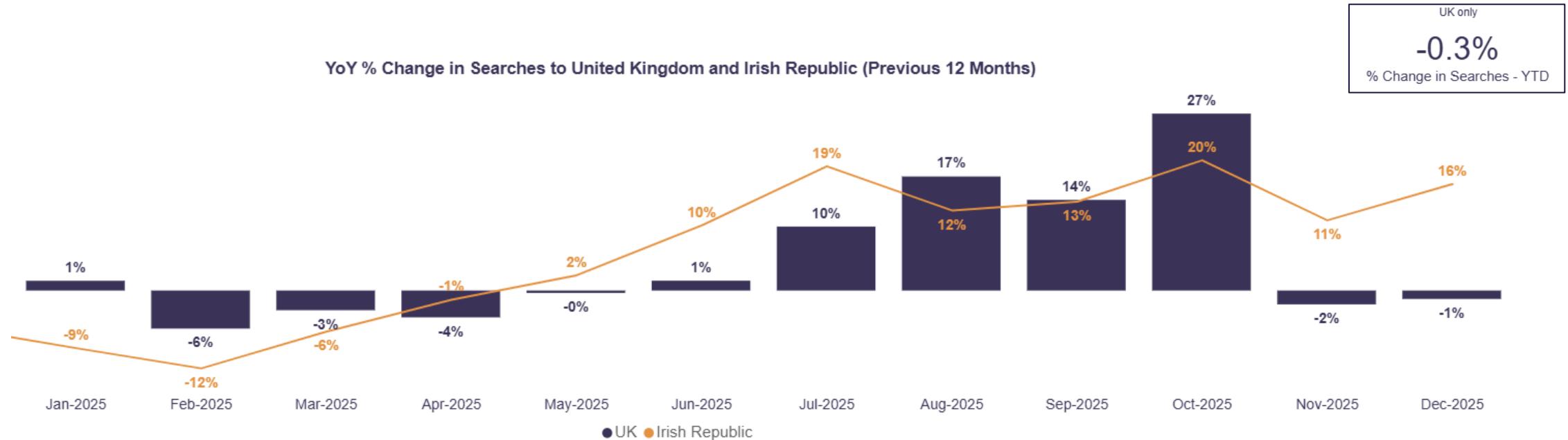


Select the different tabs to view data at different date levels



# Flight search trends | Flight searches were similar in Dec 2025 vs Dec 2024

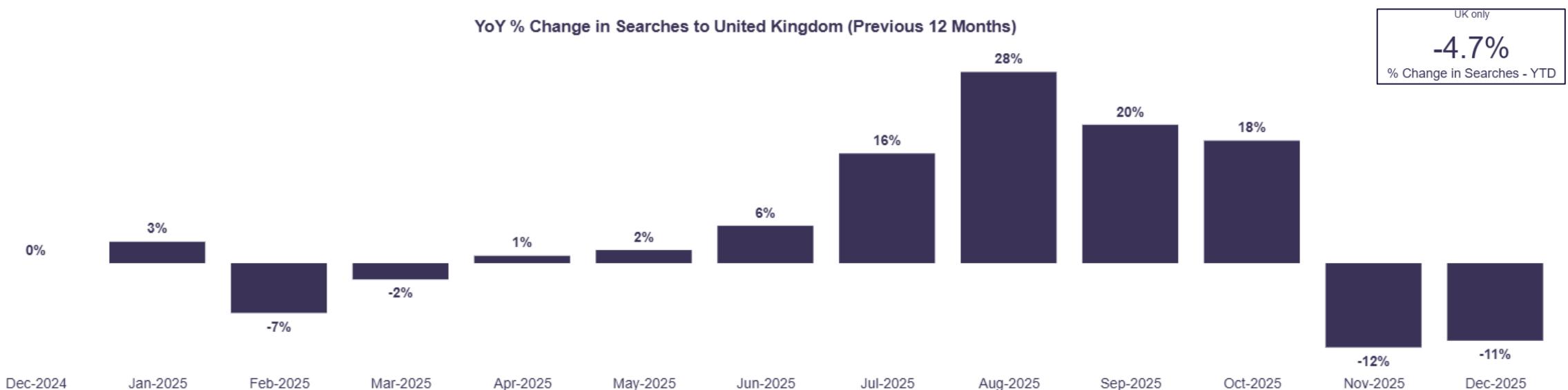
- Overall flight searches to the UK saw a slight decline in December 2025 (-1%), similar to the previous month. Across 2025, flight searches were on par with the previous year.
- Searches to the Irish Republic were up 16% YoY in December 2025, seeing higher growth than the UK.



Source: ForwardKeys Flight Searches refreshed 20/01/2026. % 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

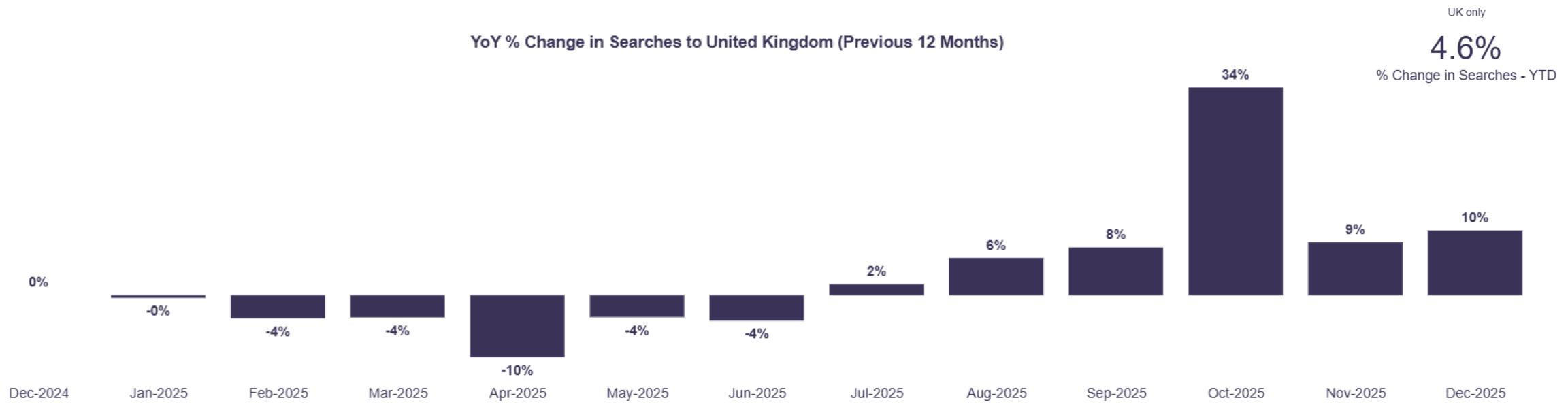
- Searches from long haul markets in aggregate (USA, Australia, Canada, India, UAE, Saudi Arabia and China), showed a YoY decline of 11% in December 2025, similar to the previous month.
- Year-to-date searches (Jan-Dec) were down 5% vs the previous year for selected long haul markets.



Source: ForwardKeys Flight Searches refreshed 20/01/2026. % 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 YoY growth into December 2025 at +10%.
- Year-to-date searches (Jan-Dec) were up 5% for short haul markets in aggregate.



Source: ForwardKeys Flight Searches refreshed 20/01/2026. % 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).



# Origin market trends | European markets led flight search growth in December 2025

Market	Jul-2025	Aug-2025	Sep-2025	Oct-2025	Nov-2025	Dec-2025
Australia	-15%	-0%	-4%	-12%	-7%	3%
Canada	32%	53%	51%	66%	19%	7%
China	-14%	3%	35%	28%	15%	-3%
France	-6%	-0%	-9%	5%	6%	16%
Germany	4%	6%	7%	7%	4%	-10%
India	-12%	3%	-6%	-15%	-10%	-9%
Italy	4%	8%	24%	95%	24%	44%
Netherlands	-24%	-19%	-12%	-2%	-9%	-7%
Norway	-16%	-5%	-13%	-5%	-7%	10%
Saudi Arabia	50%	100%	62%	40%	-24%	-27%
Spain	16%	17%	18%	58%	9%	12%
Sweden	-6%	10%	6%	-5%	-1%	-3%
Switzerland	16%	17%	8%	8%	5%	-2%
U.S.A.	24%	30%	21%	18%	-19%	-16%
United Arab Emirates	11%	33%	37%	35%	1%	-4%

Latest month: December 2025 vs December 2024

- Strongest YoY growth for flight searches to the UK was led by Italy, France, Spain and Norway.
- More moderate single digit growth was seen from Canada and Australia.
- A slight decline in demand was seen from Switzerland, Sweden, China and the UAE, with Netherlands, India and Germany also seeing single digit declines.
- The USA and Saudi Arabia saw the largest YoY declines, as they did in November as well.

Source: ForwardKeys Flight Searches refreshed 20/01/2026. % 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 | Scotland led growth in December 2025

- Scotland (16%) led growth in December 2025 followed by Wales (3%).
- Flight searches to England saw a slight decline in December (-4%), followed by larger declines to the Crown Dependencies (-10%) and Northern Ireland (-16%).

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	Dec-2025
England	11%	2%	-5%	-3%	-3%	-1%	1%	7%	16%	12%	28%	-4%	-4%
Scotland	0%	-2%	-8%	-2%	-9%	1%	6%	23%	24%	22%	22%	11%	16%
Wales	-20%	-20%	-28%	-19%	-8%	19%	-2%	-5%	-26%	-7%	22%	17%	3%
Northern Ireland	27%	20%	12%	15%	5%	23%	31%	36%	32%	44%	5%	-16%	-16%
UK Crown Dependencies	-11%	-18%	-20%	-23%	-19%	12%	10%	-0%	-9%	-6%	-7%	-9%	-10%

Source: ForwardKeys Flight Searches refreshed 20/01/2026. % 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 destinations and South West airports

- Top ranking UK cities by volume in December 2025 were London, Edinburgh, Manchester, Glasgow and Birmingham, with Edinburgh and Manchester seeing the largest YoY growth within the top 5 cities.
- The top 4 cities for growth are based on low search volumes, followed by the highest growth to Exeter, Edinburgh and Bristol.

City	Rank	Searches
London	1	19.8M
Edinburgh	2	3.9M
Manchester	3	2.1M
Glasgow	4	738.7K
Birmingham	5	614.1K
Bristol	6	373.3K
Liverpool	7	244.8K
Newcastle	8	200.6K
Belfast	9	184.8K
Leeds	10	122.3K
Inverness	11	118.6K
Cardiff	12	103.4K
Aberdeen	13	76.8K
Nottingham	14	73.3K
Southampton	15	55.8K

City	Rank	YoY % Change in Searches
Eday *	1	469%
Westray *	2	400%
North Ronaldsay *	3	179%
Papa Westray *	4	114%
Exeter	5	25%
Edinburgh	6	23%
Bristol	7	13%
Newcastle	8	9%
Manchester	9	8%
Bournemouth	10	7%
Cardiff	11	3%
Durham Tees Valley	12	3%
Shetland Islands	13	2%
Isle Of Man	14	2%
Glasgow	15	-1%

Source: ForwardKeys Flight Searches refreshed 20/01/2026. % 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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