

# **Amadeus Air Traffic Trends Monthly Update**

## **Data up to December 2025**

VisitBritain/VisitEngland Research

December 2025

# 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. This modelling provides a useful complement to the ForwardKeys bookings data, which has low coverage in Europe due to its exclusion of low-cost airlines.
- 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 **December 2025** is shown in this report and the data was extracted on 05/02/26.
- 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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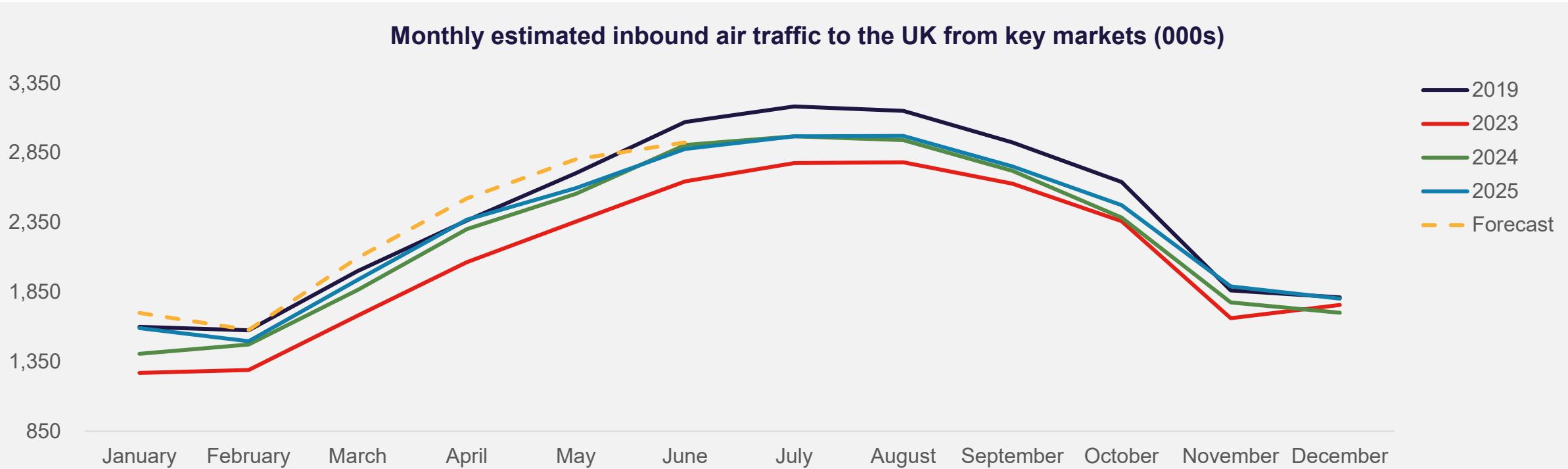


## December 2025 | Inbound air traffic in 2025 exceeded 2024 levels, with short haul markets seeing the most growth

- In December, inbound traffic to the UK was **6% higher** than what was seen in the same month in 2024, in line with November's growth rate. Inbound traffic in 2025 overall exceeded 2024 levels by 3%.
- Within 2025, inbound traffic to the UK **exceeded 2024 and 2023 levels** on average but still fell short of 2019. Forecasts predict that inbound traffic will remain above 2025 levels for at least the first half of 2026.
- 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 2025.
- 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, Stornoway, and Newquay demonstrated the strongest growth within 2025 compared to 2019.

Notes: Amadeus air traffic data refreshed 05/02/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

# Inbound air traffic trends (volume) | 2025 generally exceeded 2024 and 2023 levels of traffic, just slightly below 2019

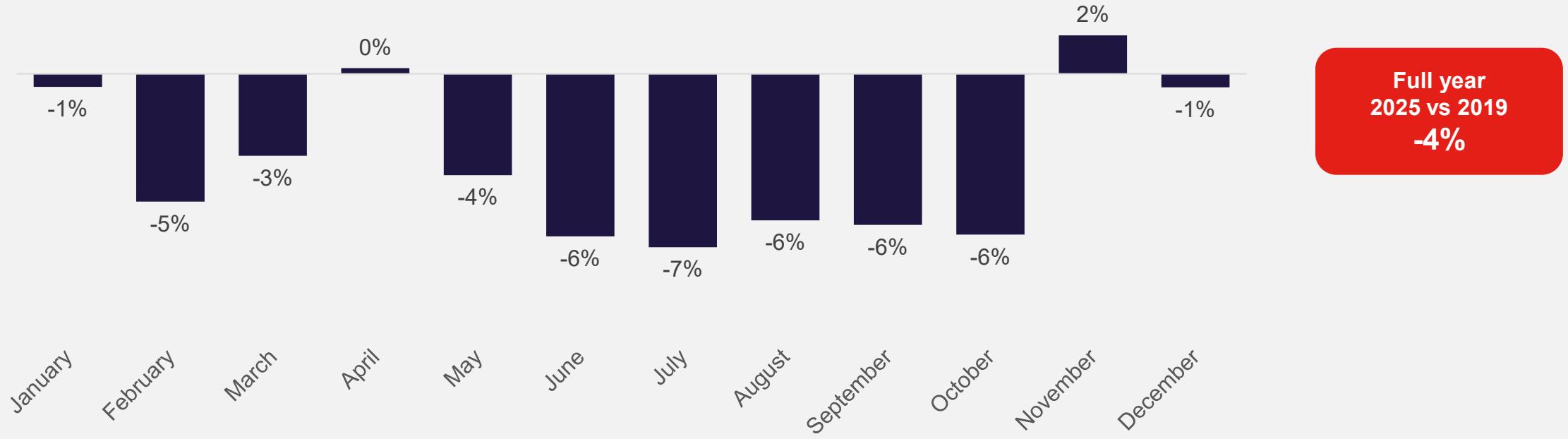


- In 2025, inbound air traffic to the UK generally exceeded 2024 and 2023 levels but fell short of 2019 levels. The exception to this was in June and July 2025 – in June, traffic dropped below 2024 levels by 1%, and in July, traffic stayed level year-on-year.
- All years demonstrate a consistent seasonal pattern, with traffic peaking in the summer months.
- Forecasts for the first half of 2026 predict that inbound traffic will continue to exhibit year-on-year growth, with a particularly strong March and May.

Notes: Amadeus air traffic data refreshed 05/02/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

# Inbound air traffic vs. pre-COVID | Air traffic to the UK in 2025 fell below 2019 levels

Monthly estimated inbound air traffic from key markets in current year vs. 2019

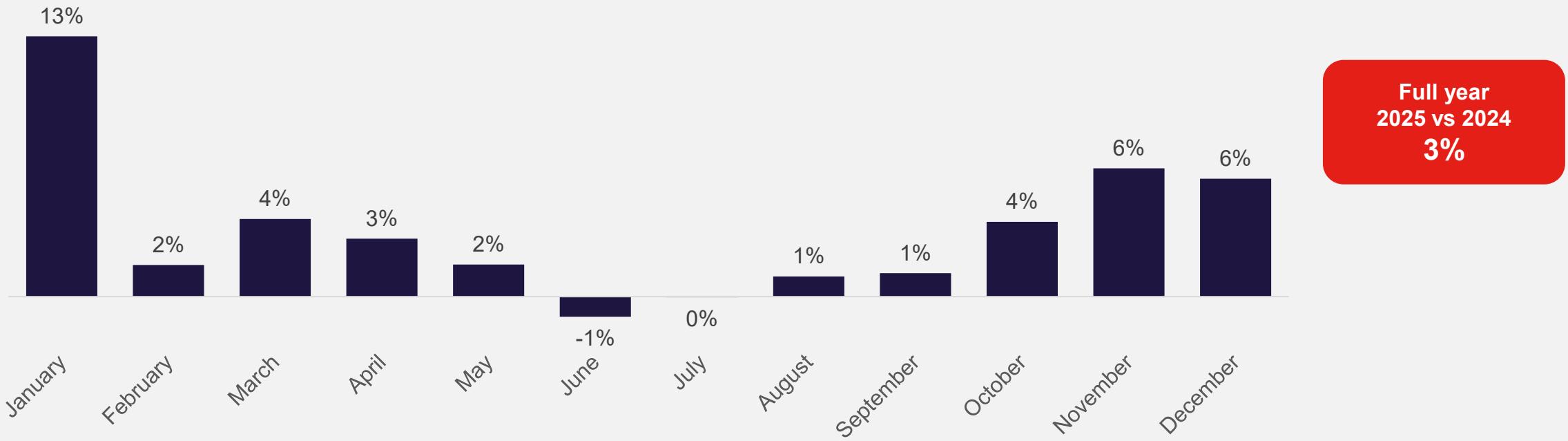


- Inbound traffic to the UK was below 2019 levels throughout 2025, apart from in April where volumes were matched between years, and November which saw 2% growth. Overall, the June to October period saw the poorest performance when compared with pre-COVID traffic.

Notes: Amadeus air traffic data refreshed 05/02/26. % growth vs. 2019 shown. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

# Inbound air traffic vs. 2024 | The UK seeing strongest year-on-year growth in Q1 and Q4

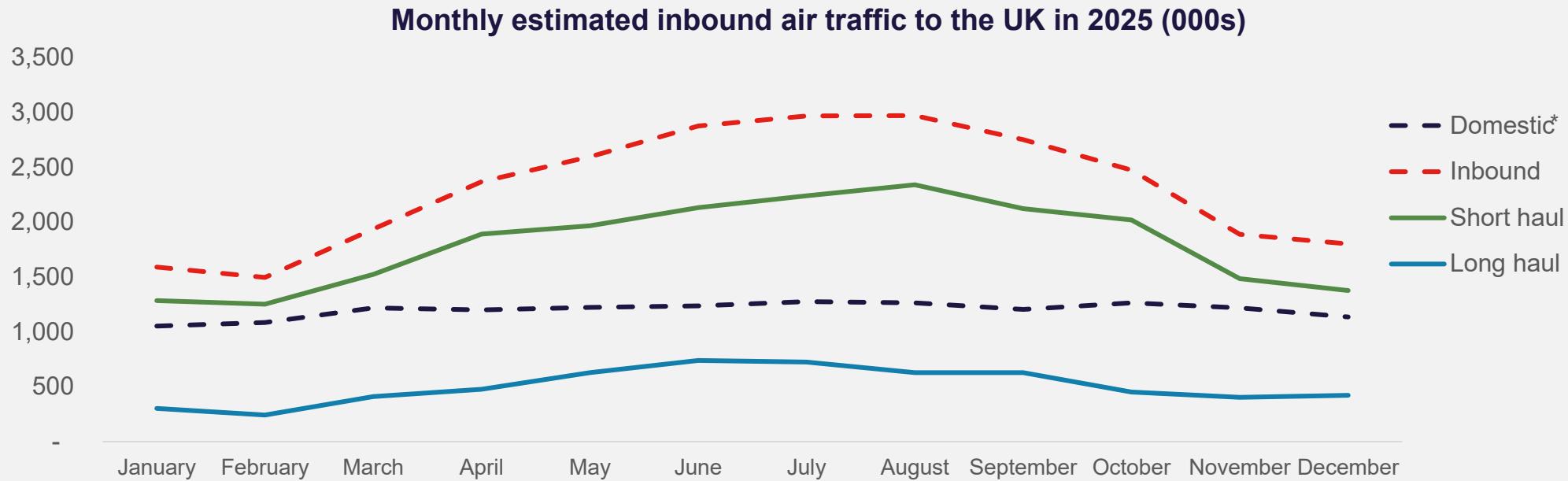
Monthly estimated inbound air traffic from key markets in current year vs. 2024



- When comparing 2025 with 2024, the UK saw increased volumes of inbound air traffic apart from in June and July. The strongest month in 2025 was January, which saw 13% growth, followed by November and December (both 6%).

Notes: Amadeus air traffic data refreshed 05/02/26. % growth vs. 2024 shown. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

# Origin market trends (volume) | Inbound traffic showing the clearest seasonal pattern, whereas domestic traffic has been flatter through 2025



- Inbound air traffic has consistently seen a larger volume of air traffic vs. domestic, with inbound air traffic increasing steadily from March into the summer months conforming with seasonal trends, as domestic air traffic remained relatively level.
- After a slow start to 2025 both short haul and long haul markets saw an upturn in air traffic from March onwards, before declining after the summer months in line with seasonal patterns .

Notes: Amadeus air traffic data refreshed 05/02/26. 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

# 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%	-5%	7%	2%	3%	-27%	8%	-5%	-4%	-26%	59%	6%
April	-10%	0%	-3%	16%	-10%	0%	-17%	3%	-1%	2%	-20%	132%	18%
May	-13%	-4%	-6%	6%	-4%	-5%	-18%	-4%	0%	4%	-31%	184%	5%
June	-8%	-6%	-10%	5%	-7%	-9%	-18%	-9%	-2%	-1%	-31%	62%	7%
July	-8%	-7%	-11%	10%	-6%	-4%	-16%	-11%	-4%	-4%	-31%	76%	12%
August	-8%	-6%	-9%	7%	-3%	2%	-18%	-9%	1%	2%	-32%	58%	7%
September	-8%	-6%	-10%	13%	-3%	-1%	-19%	-8%	-5%	-1%	-32%	99%	14%
October	-7%	-6%	-9%	12%	-2%	2%	-21%	-6%	-3%	-1%	-33%	148%	10%
November	-4%	2%	-2%	18%	-3%	8%	-12%	6%	4%	-1%	-25%	266%	10%
December	1%	-1%	0%	-3%	-22%	-2%	-9%	13%	5%	5%	-31%	126%	-6%
<b>Full year</b>	<b>-8%</b>	<b>-4%</b>	<b>-7%</b>	<b>9%</b>	<b>-5%</b>	<b>-2%</b>	<b>-19%</b>	<b>-3%</b>	<b>0%</b>	<b>-1%</b>	<b>-29%</b>	<b>109%</b>	<b>8%</b>

- Within 2025, the volume of inbound air traffic has been closer to 2019 levels compared to domestic traffic (-4% vs. -8% for the full year).
- 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 7% below 2019 within 2025. Saudi Arabia demonstrates the highest year-on-year growth in air traffic, peaking in November 2025 at 266%.

Notes: Amadeus air traffic data refreshed 05/02/26. % 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%	-8%	-5%	0%	5%	5%	12%	9%	13%	-2%
April	7%	3%	3%	4%	-5%	3%	13%	-1%	2%	6%	7%	22%	4%
May	2%	2%	3%	-2%	-7%	-7%	3%	-1%	5%	15%	4%	36%	-3%
June	6%	-1%	1%	-7%	-7%	-8%	4%	-3%	7%	11%	-1%	2%	-8%
July	4%	0%	-1%	5%	-1%	3%	4%	-6%	1%	7%	1%	14%	5%
August	4%	1%	2%	-1%	-1%	3%	11%	-3%	2%	10%	8%	25%	-4%
September	4%	1%	2%	-1%	-4%	5%	10%	-2%	4%	10%	-3%	9%	-3%
October	7%	4%	4%	2%	5%	8%	9%	1%	5%	10%	1%	18%	-1%
November	10%	6%	8%	3%	-11%	6%	8%	6%	7%	13%	6%	14%	2%
December	8%	6%	11%	-7%	-9%	0%	5%	12%	5%	22%	7%	1%	-8%
<b>Full year</b>	<b>5%</b>	<b>3%</b>	<b>4%</b>	<b>0%</b>	<b>-4%</b>	<b>0%</b>	<b>7%</b>	<b>0%</b>	<b>5%</b>	<b>11%</b>	<b>5%</b>	<b>13%</b>	<b>-1%</b>

- Within 2025 overall, both domestic and inbound air traffic has exceeded 2024 levels. Within inbound air traffic, short haul markets have exceeded 2024 levels by 4% in 2025, 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, peaking in May. Australia also saw a significant peak of 25% growth in January.

Notes: Amadeus air traffic data refreshed 05/02/26. % 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 2025, 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	Newcastle upon Tyne	Liverpool	Leeds	Belfast
January	16%	9%	19%	10%	3%	12%	14%	26%	39%	10%
February	2%	-2%	9%	-4%	-4%	2%	9%	25%	9%	19%
March	5%	1%	6%	-7%	3%	-10%	20%	23%	24%	18%
April	6%	8%	3%	-8%	-9%	-6%	-1%	12%	-6%	-11%
May	4%	0%	2%	-8%	-8%	-7%	-2%	1%	-1%	1%
June	0%	-6%	3%	-5%	-1%	-12%	-4%	19%	3%	-11%
July	4%	-7%	8%	-16%	-6%	-14%	-15%	5%	-6%	-2%
August	4%	-6%	11%	-8%	1%	-12%	-13%	10%	-8%	17%
September	4%	-4%	11%	-6%	-2%	-4%	-4%	5%	-12%	-6%
October	7%	-4%	7%	-4%	3%	1%	-9%	19%	6%	15%
November	8%	3%	18%	2%	6%	-11%	-11%	-22%	25%	31%
December	5%	3%	16%	6%	17%	-10%	5%	28%	16%	3%
<b>Full year</b>	<b>5%</b>	<b>-1%</b>	<b>8%</b>	<b>-5%</b>	<b>-1%</b>	<b>-7%</b>	<b>-4%</b>	<b>10%</b>	<b>1%</b>	<b>4%</b>

## Top growing cities in 2025 vs. 2019

City	% change
Durham	152%
Stornoway	85%
Newquay	71%
Shetland Islands	70%
Bournemouth	67%
Islay	46%
Derry	33%
Kirkwall	26%
Edinburgh	19%
Bristol	5%

- In December 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 2025 Liverpool has seen the most growth at 10%, followed by Edinburgh (8%) and London (5%). Glasgow saw 7% less air traffic in 2025 than in 2024, with Birmingham, Newcastle, Manchester and Bristol also seeing declines.
- Looking at cities which have seen the most growth in inbound air traffic in 2025 vs. 2019, Durham ranks first, followed by Stornoway and Newquay.

Notes: Amadeus air traffic data refreshed 05/02/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.