

# Amadeus Air Traffic Trends Monthly Update Data up to March 2026

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. 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 **March 2026** is shown in this report and the data was extracted on 27/04/26.
- Data for the 6 months prior to the latest month may be adjusted at source in future releases.
- 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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# March 2026 | Air traffic to the UK continued to see year-on-year growth in March 2026

- In March, inbound air traffic to the UK was **3% higher** than what was seen in the same month in 2025, a slight weakening of the 5% growth seen in February 2026 compared to previous year levels.
- Inbound air traffic to the UK in March 2026 also **exceeded 2024 and 2023** but saw similar levels to 2019. Forecasts predict that inbound air traffic will remain above 2025 levels up to September but fall below 2019 levels in the early summer months.
- Domestic air traffic in the UK saw higher year-on-year growth than inbound air traffic in March 2026, with **long haul markets** seeing a significant decline in air traffic linked to the Middle East conflict. **Short haul markets** continued the pattern of year-on-year growth seen since summer 2025.
- Amongst the top UK cities for inbound air traffic **Birmingham, Edinburgh, Liverpool and Newcastle upon Tyne** saw the most year-on-year growth. Amongst all UK cities, Stornoway, Shetland Islands and Durham demonstrated the strongest growth within March 2026 compared to March 2019.

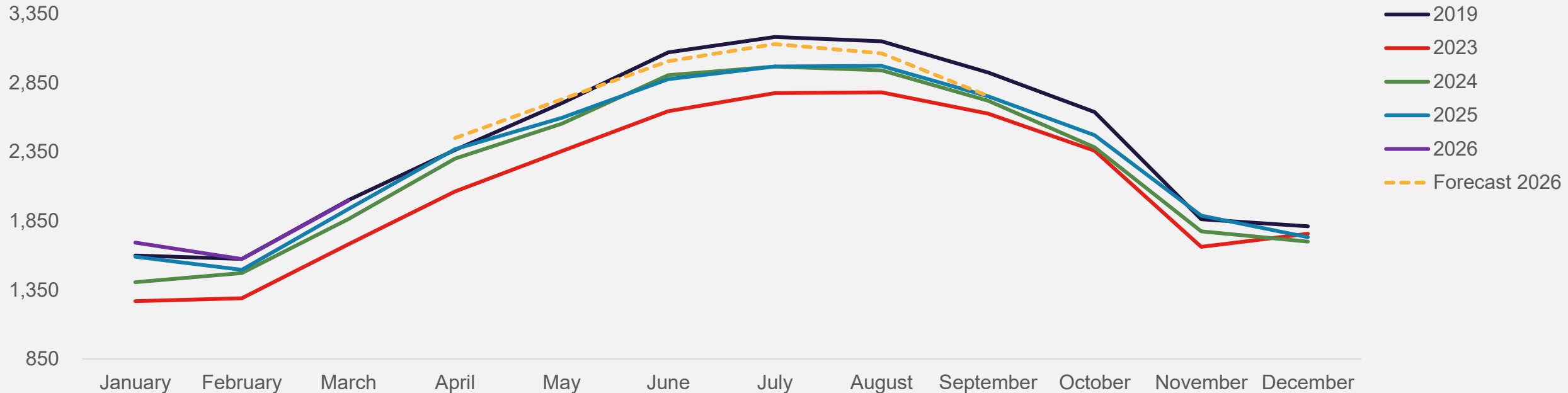
Notes: Amadeus air traffic data refreshed 27/04/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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# Inbound air traffic trends (volume) | March 2026 exceeded 2025 levels as well as 2024 and 2023, while remaining level with 2019

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



- In March 2026, inbound air traffic to the UK continued to exceed 2025, 2024, and 2023 but saw similar levels of air traffic to 2019.
- All years demonstrate a consistent seasonal pattern, with traffic peaking in the summer months.
- Forecasts for the next 6 months (April 2026 – September 2026) predict that inbound air traffic will continue to exhibit year-on-year growth but will fall behind 2019 levels over the summer months.

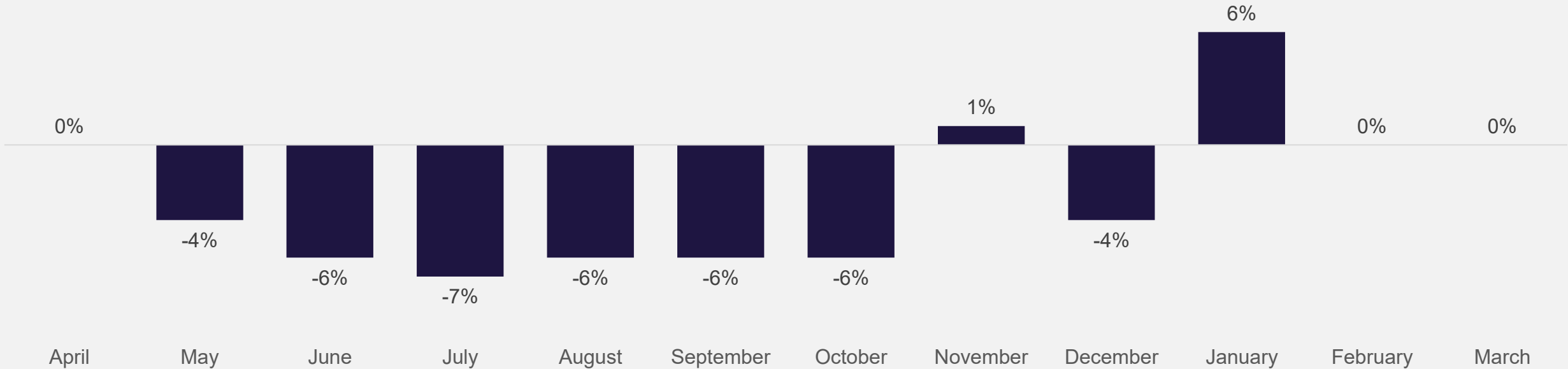
Notes: Amadeus air traffic data refreshed 27/04/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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# Inbound air traffic vs. pre-COVID | Air traffic to the UK in March 2026 was similar to March 2019

Monthly estimated inbound air traffic from key markets in the last 12 months vs. 2019



- Inbound air traffic to the UK in March 2026 was level with 2019 for a second consecutive month. Despite air traffic being level with 2019 in February and March, the start to 2026 has been more positive than the declines seen throughout most of 2025.

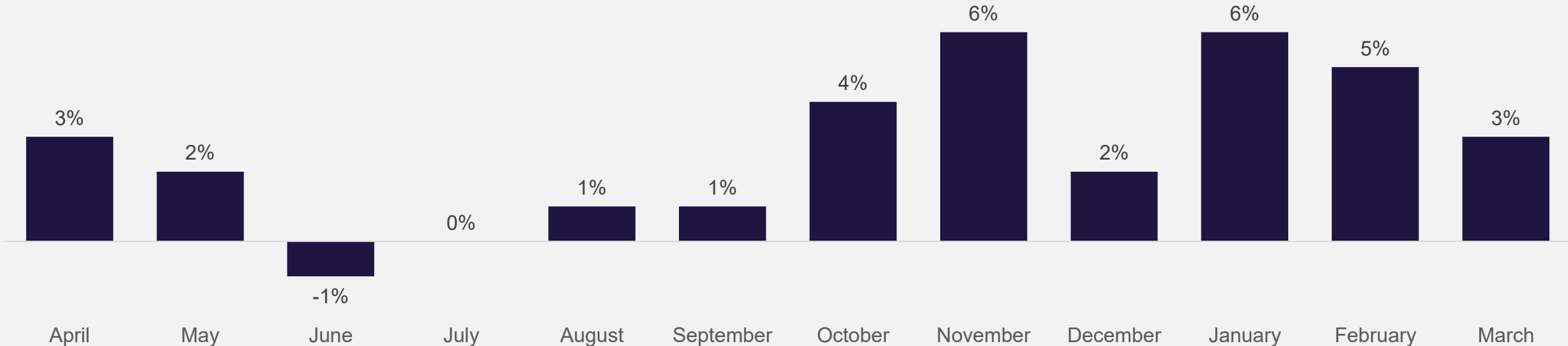
Notes: Amadeus air traffic data refreshed 27/04/26. % growth vs. 2019 shown. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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# Inbound air traffic vs. previous year | Growth in air traffic to the UK compared to previous year levels continued into March 2026

Monthly estimated inbound air traffic from key markets in last 12 months vs. previous year levels



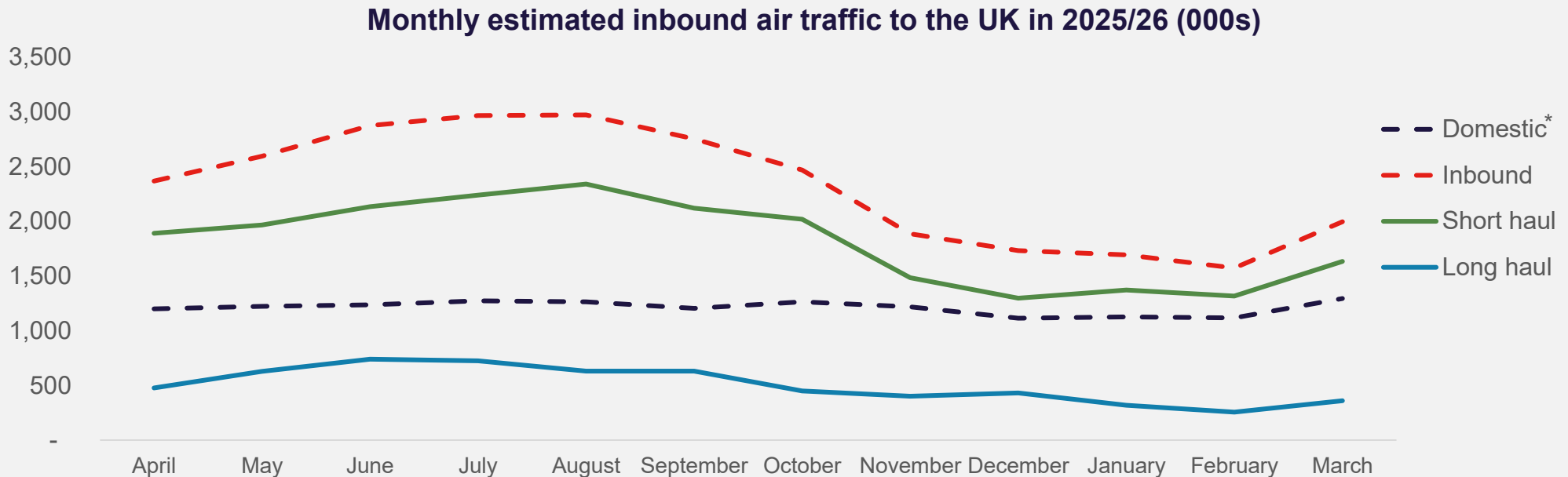
- March 2026 saw year-on-year growth of 3%; this represents a slight weakening of the growth seen in January and February (6% and 5% respectively). As of March, growth has been maintained since August 2025, with June 2025 the only month to see a decline in the last year.

Notes: Amadeus air traffic data refreshed 27/04/26. % growth vs. previous year 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) | The clear seasonal pattern in inbound air traffic continued in March 2026, with air traffic seeing an upturn heading into spring



- Inbound air traffic has consistently demonstrated higher volumes vs. domestic, with inbound air traffic seeing an upturn heading into the spring months conforming with seasonal trends, whereas domestic air traffic remained relatively level.
- In March 2026, both short haul and long haul showed an increase in air traffic volume, however, short haul showed a slightly stronger rise, with its seasonal pattern more similar to the general inbound trend.

Notes: Amadeus air traffic data refreshed 27/04/26. 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

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# Origin market trends vs. pre-COVID | Australia showing the largest year-on-year decline in air traffic to the UK in March 2026 due to Middle East conflict

## Monthly estimated inbound air traffic in 2025/26 vs. 2019

	Domestic*	Inbound	Short haul	Long haul	Australia	Canada	Germany	Spain	France	Italy	Neth.	Saudi Arabia	USA
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%	11%	-7%	-5%	-16%	-11%	-4%	-4%	-31%	76%	12%
August	-8%	-6%	-9%	8%	-3%	2%	-18%	-9%	1%	2%	-32%	59%	8%
September	-8%	-6%	-10%	13%	-3%	-1%	-19%	-8%	-5%	-1%	-32%	100%	15%
October	-7%	-6%	-10%	12%	-10%	2%	-21%	-6%	-3%	-1%	-33%	149%	11%
November	-4%	1%	-2%	18%	-5%	8%	-12%	6%	4%	-1%	-25%	266%	9%
December	-1%	-4%	-5%	-1%	-24%	-3%	-5%	-1%	3%	-1%	-32%	106%	-1%
January	-4%	6%	3%	23%	39%	11%	-22%	17%	23%	5%	-34%	182%	12%
February	-6%	0%	-2%	11%	12%	-1%	-25%	11%	12%	2%	-30%	116%	8%
March	-3%	0%	1%	-6%	-35%	-3%	-23%	19%	1%	3%	-27%	54%	-5%
<b>Year-to-date</b>	<b>-5%</b>	<b>2%</b>	<b>1%</b>	<b>7%</b>	<b>3%</b>	<b>2%</b>	<b>-23%</b>	<b>16%</b>	<b>11%</b>	<b>3%</b>	<b>-30%</b>	<b>120%</b>	<b>3%</b>

- In March 2026, inbound air traffic was at a similar level to 2019, however, domestic air traffic continued to see levels below 2019.
- Among international origin markets, long haul air traffic showed a decline of 6% compared to March 2019. Air traffic from Australia fell sharply in March 2026 to -35%, which can be linked to the Middle East conflict and the disruption caused to connecting flights from the region's airports. While Canada and the US saw more moderate declines of -3% and -5% respectively.
- Short haul air traffic was slightly up in March 2026; 1% above 2019 levels. Spain saw the highest growth compared to March 2019 at 19%, while Italy (+3%) and France (+1%) showed weaker growth. The Netherlands (-27%) and Germany (-23%) saw significant declines vs March 2019.

Notes: Amadeus air traffic data refreshed 27/04/26. % 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. previous year | Both domestic and inbound air traffic saw year-on-year growth in March 2026, with Spain leading market growth

## Monthly estimated inbound air traffic in 2025/26 vs. previous year

	Domestic*	Inbound	Short haul	Long haul	Australia	Canada	Germany	Spain	France	Italy	Neth.	Saudi Arabia	USA
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%	0%	15%	5%
August	4%	1%	2%	-1%	-1%	3%	11%	-3%	2%	10%	8%	25%	-4%
September	4%	1%	2%	-1%	-5%	5%	10%	-2%	4%	10%	-3%	10%	-2%
October	7%	4%	4%	1%	-4%	7%	9%	1%	5%	10%	1%	19%	0%
November	10%	6%	8%	2%	-13%	7%	8%	6%	7%	13%	6%	14%	2%
December	6%	2%	4%	-5%	-12%	0%	10%	-2%	3%	15%	5%	-8%	-3%
January	7%	6%	7%	5%	15%	8%	6%	6%	14%	13%	-11%	22%	0%
February	3%	5%	5%	6%	8%	7%	9%	5%	4%	7%	-2%	-3%	6%
March	6%	3%	7%	-12%	-36%	-5%	6%	10%	7%	7%	-2%	-3%	-11%
<b>Year-to-date</b>	<b>5%</b>	<b>5%</b>	<b>6%</b>	<b>-2%</b>	<b>-5%</b>	<b>2%</b>	<b>7%</b>	<b>7%</b>	<b>8%</b>	<b>9%</b>	<b>-5%</b>	<b>8%</b>	<b>-4%</b>

- March 2026 saw both domestic and inbound air traffic exceed March 2025 levels. Within inbound air traffic, short haul markets saw 7% growth, while long haul markets fell by 12% due largely to the Middle East conflict.
- All long haul markets demonstrated year-on-year declines in March 2026, with Australia the market the most greatly impacted at -36%. The closure of airspace and cancellation of connecting flights because of the Middle East conflict are likely to be a main cause of the fall in air traffic from Australia. The US fell 11% below previous year levels, while Canada (-5%) and Saudi Arabia (-3%) saw more moderate declines.
- Spain saw the highest year-on-year growth of any market in March 2026 at 10%, while the Netherlands was the only short haul market to decline, falling below 2025 levels by 2%.

Notes: Amadeus air traffic data refreshed 27/04/26. % growth vs. previous year 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. previous year | Birmingham, Edinburgh, Liverpool and Newcastle Upon Tyne seeing strong growth in March 2026

Year-on-year change in air traffic for top ranked UK cities in 2025/26 vs. previous year

	London	Manchester	Edinburgh	Birmingham	Bristol	Glasgow	Newcastle upon Tyne	Liverpool	Leeds	Belfast
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%	-13%	-15%	5%	-6%	-2%
August	5%	-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	3%	-3%	12%	-4%	2%	-17%	-3%	19%	8%	-2%
January	8%	5%	14%	1%	-3%	3%	12%	0%	-2%	-1%
February	6%	0%	12%	7%	3%	4%	4%	3%	-4%	4%
March	0%	5%	14%	15%	4%	-1%	12%	13%	2%	-2%

Top growing cities in March 2026 vs. March 2019

City	% change
Stornoway	287%
Shetland Islands	220%
Durham	125%
Bournemouth	124%
Derry	34%
Edinburgh	32%
Kirkwall	27%
Bristol	25%
Islay	18%
Birmingham	15%

- In March 2026, 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 March 2026 Birmingham saw the most growth at 15%, followed by Edinburgh (+14%), Liverpool (+13%) and Newcastle upon Tyne (+12%). Belfast (-2%) and Glasgow (-1%) both saw less air traffic in March 2026 than in March 2025.
- Looking at cities which have seen the most growth in inbound air traffic in March 2026 vs. March 2019, Stornoway ranks first, followed by Shetland Islands and Durham.

Notes: Amadeus air traffic data refreshed 27/04/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.