

Amadeus Air Traffic Trends Monthly Update **Data up to July 2026**

VisitBritain/VisitEngland Research

September 2026



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 only includes indirect flight bookings and therefore a low coverage in Europe and some long haul markets.
- 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.
- The dataset includes return and one-way tickets, and it is not possible to differentiate between residents and visitors from inbound markets travelling on a one-way ticket.
- Data is available from 2019 and up to 6 months ahead of the most recent reporting month.
- Data up to **July 2026** is shown in this report and the data was extracted on 26/08/26.
- Historic data 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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July 2026 | Year-on-year growth in air traffic to the UK continued in July maintaining the positive trend seen in the first half of 2026

- In July 2026, inbound air traffic to the UK was **6% higher** than what was seen in July 2025; this was stronger growth than the 4% uplift seen in June but was just behind the 7% increase in May.
- Inbound air traffic to the UK in July 2026 also **exceeded 2024 and 2023 but remained slightly below 2019 levels**. Forecasts predict that inbound air traffic will surpass 2025 levels over the next three months before dipping in November. The end of the year is expected to see year-on-year growth return, however, a slow start to 2027 is set to follow. Air traffic is set to remain under 2019 levels up to November before an upturn at the end of 2026 and a positive beginning to next year compared 2019.
- Inbound air traffic continued to see year-on-year growth in July 2026, while domestic air traffic just surpassed previous year levels in July after a dip last month. Different trends remain evident at the inbound market level, **long haul markets** are still seeing the impacts linked to the Middle East conflict as air traffic continues to see declines, however, **short haul markets** are maintaining a positive trend of year-on-year growth.
- Amongst the top UK cities for inbound air traffic **Nottingham, Liverpool and Birmingham** saw the most year-on-year growth in July 2026. Amongst all UK cities, Durham, Bournemouth and Shetland Islands demonstrated the strongest growth in July 2026 compared to July 2019.

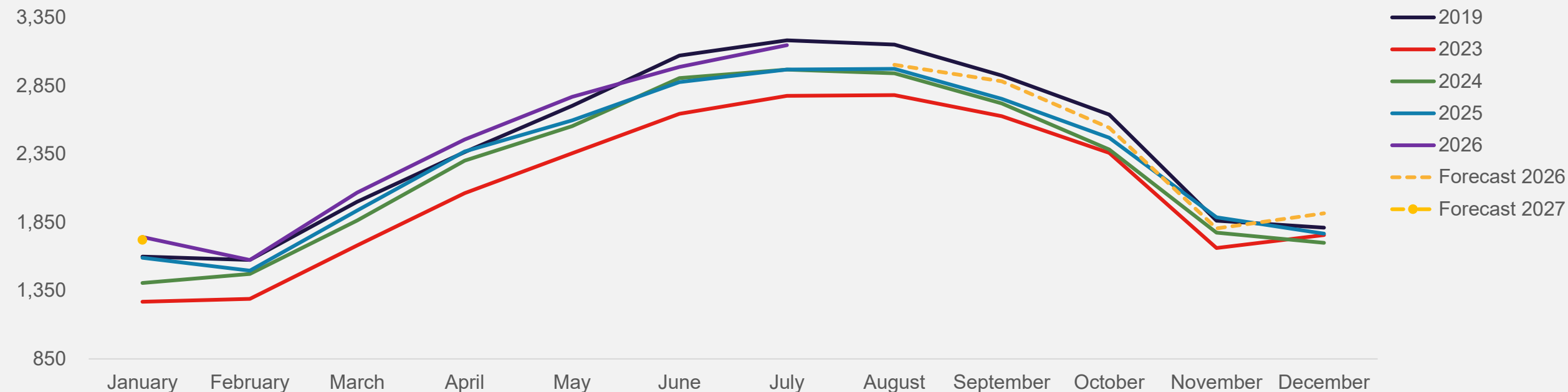
Notes: Amadeus air traffic data refreshed 26/08/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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Inbound air traffic trends (volume) | July 2026 continued to exceed 2025 levels as well as 2024 and 2023 but remained below 2019

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



- In July 2026, inbound air traffic to the UK remained above 2025, 2024 and 2023, however, dipped below 2019 levels for a second consecutive month.
- All years demonstrate a consistent seasonal pattern, with air traffic reaching the peak of the summer months.
- Forecasts predict that inbound air traffic will remain above previous year levels over the next three months before dipping in November. There will then be year-on-year growth in inbound air traffic in December but a slow start to 2027 is expected. Air traffic is forecast to stay under 2019 levels up to December but then there is set to be a positive beginning to 2027 vs 2019.

Notes: Amadeus air traffic data refreshed 26/08/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

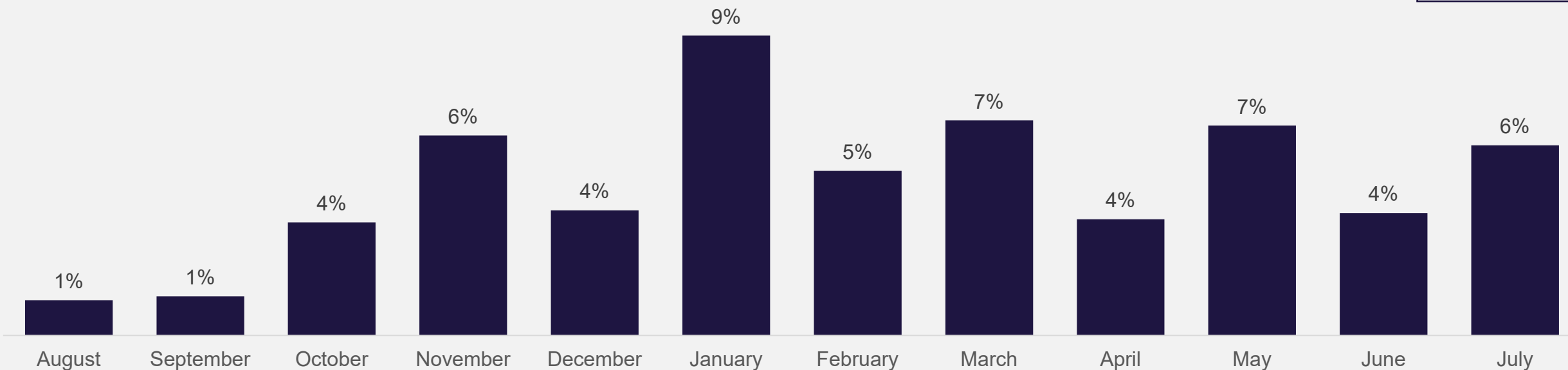
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Inbound air traffic vs. previous year | Year-on-year growth in air traffic to the UK was stronger in July compared to the previous month

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

Year-to-date:
+6%



- July 2026 saw year-on-year growth of 6%; stronger growth than the 4% increase seen in June. There has been a consistent pattern of year-on-year growth seen over the last 12 months with no month seeing a decline.
- The year-to-date so far in 2026 has been positive for air traffic to the UK with year-on-year growth of 6% from January to July 2026.

Notes: Amadeus air traffic data refreshed 26/08/26. % growth vs. previous year shown. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

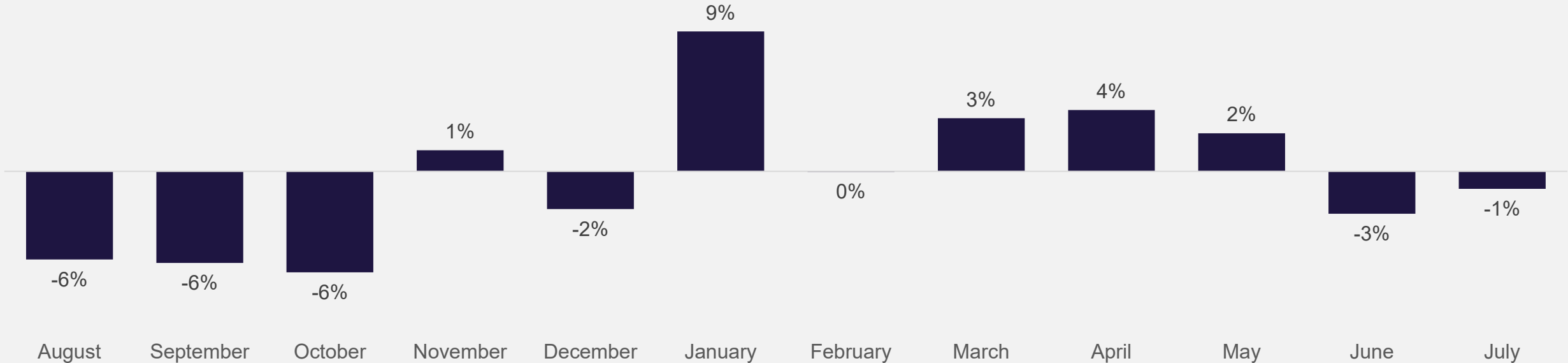
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Inbound air traffic vs. pre-COVID | Air traffic to the UK in July 2026 remained below 2019 levels for the second consecutive month

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

Year-to-date:
+2%



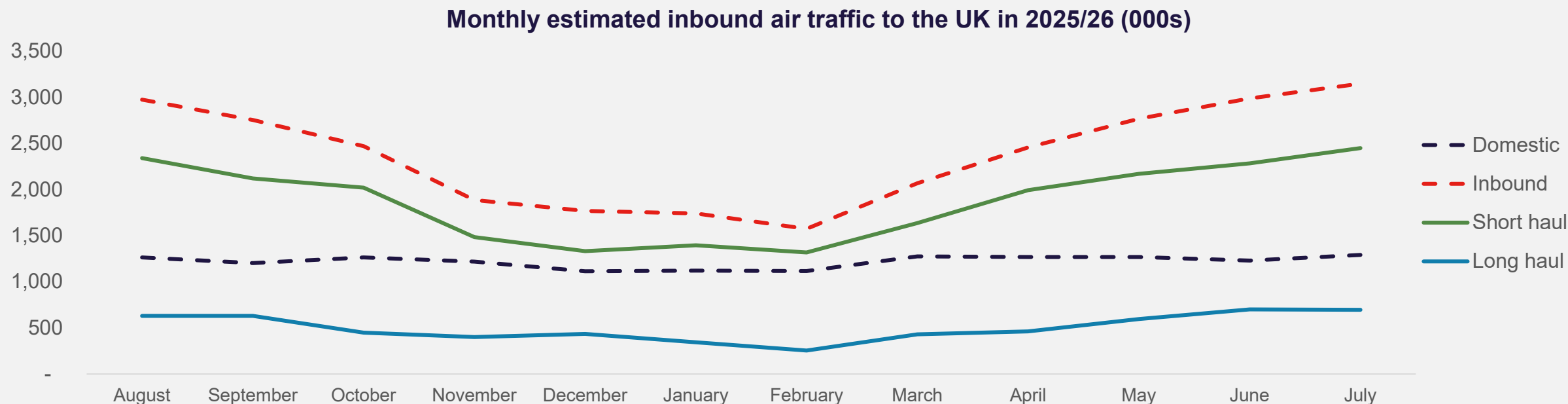
- Inbound air traffic to the UK in July 2026 stayed under 2019 levels with a decline of 1%. The decline in July followed a 3% decrease in June, which was the first of 2026.
- Despite the declines in recent months, air traffic remains above 2019 levels for the year-to-date in 2026 by 2%.

Notes: Amadeus air traffic data refreshed 26/08/26. % 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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Origin market trends (volume) | The clear seasonal pattern in inbound air traffic continued in July, with air traffic to the UK reaching the summer peak



- Inbound air traffic has consistently demonstrated higher volumes vs. domestic, with inbound air traffic reaching the peak of the summer months conforming with seasonal trends, whereas domestic air traffic remained flat.
- In July 2026, short haul air traffic continued to rise steadily, however, long haul air traffic began to level out.

Notes: Amadeus air traffic data refreshed 26/08/26. 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. previous year | inbound air traffic saw higher year-on-year growth in July 2026 than domestic air traffic, with short haul travel continuing to see growth while long haul remains below 2025

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

Last 12 months	Domestic*	Inbound	Short haul	Long haul	Australia	Canada	France	Germany	Italy	Netherlands	Saudi Arabia	Spain	USA
August	4%	1%	2%	-1%	-1%	3%	2%	11%	10%	8%	25%	-3%	-4%
September	4%	1%	2%	-1%	-5%	5%	4%	10%	10%	-3%	10%	-2%	-2%
October	7%	4%	4%	1%	-4%	7%	5%	9%	10%	1%	19%	1%	-1%
November	10%	6%	8%	2%	-13%	7%	7%	8%	13%	6%	14%	6%	1%
December	6%	4%	7%	-4%	-8%	-1%	11%	12%	16%	5%	-4%	0%	-4%
January	6%	9%	9%	13%	21%	15%	15%	9%	15%	-8%	35%	7%	9%
February	3%	5%	5%	5%	1%	8%	4%	9%	7%	-3%	0%	5%	6%
March	5%	7%	7%	5%	11%	3%	3%	13%	6%	-2%	74%	9%	0%
April	6%	4%	5%	-3%	-7%	5%	-1%	-4%	12%	-5%	-27%	9%	-2%
May	4%	7%	10%	-5%	-11%	7%	0%	5%	11%	-3%	-6%	16%	-6%
June	-1%	4%	7%	-5%	-14%	9%	2%	-3%	7%	0%	-37%	11%	-3%
July	1%	6%	9%	-4%	-7%	5%	8%	-3%	9%	-6%	-14%	14%	-4%
Year-to-date	3%	6%	8%	-1%	-4%	7%	4%	3%	9%	-4%	-5%	11%	-2%

- July 2026 saw inbound air traffic grow by 6% vs 2025, higher growth than the 1% uplift seen for domestic air traffic. Within inbound air traffic, short haul markets saw growth of 9%, a slight rise on the 7% growth seen in June. Long haul air traffic remains below previous year levels due to the Middle East conflict.
- Most long haul markets continued to see declines in July, apart from Canada which saw growth of 5%. Saudi Arabia (-14%) and Australia (-7%) are seeing more moderate declines than at the peak of the Middle East conflict. The USA stayed under 2025 levels at -4%.
- Spain (+14%) is still seeing the highest year-on-year growth of short haul markets, with Italy (+9%) and France (+8%) also seeing an upturn. The Netherlands and Germany both saw air traffic to the UK fall below 2025 levels by 6% and 3% respectively.

Notes: Amadeus air traffic data refreshed 26/08/26. % 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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Origin market trends vs. pre-COVID | Inbound air traffic to the UK remained just under 2019 levels in July 2026, with long haul seeing growth while short haul was down vs 2019

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

Last 12 months Domestic* Inbound			Short haul	Long haul	Australia	Canada	France	Germany	Italy	Netherlands	Saudi Arabia	Spain	USA
August	-8%	-6%	-9%	8%	-3%	2%	1%	-18%	2%	-32%	59%	-9%	8%
September	-8%	-6%	-10%	13%	-3%	-1%	-5%	-19%	-1%	-32%	100%	-8%	15%
October	-7%	-6%	-10%	11%	-10%	2%	-3%	-21%	-1%	-33%	149%	-6%	10%
November	-4%	1%	-2%	17%	-6%	8%	4%	-12%	-1%	-25%	266%	6%	9%
December	-1%	-2%	-3%	0%	-21%	-3%	11%	-3%	0%	-32%	115%	1%	-1%
January	-5%	9%	4%	33%	46%	19%	25%	-20%	6%	-32%	211%	18%	22%
February	-6%	0%	-2%	11%	5%	-1%	12%	-25%	2%	-31%	121%	11%	8%
March	-5%	3%	2%	12%	14%	6%	-2%	-17%	2%	-27%	178%	18%	6%
April	-5%	4%	2%	12%	-16%	5%	-1%	-20%	15%	-25%	70%	12%	15%
May	-10%	2%	3%	0%	-15%	1%	1%	-15%	15%	-33%	168%	12%	-1%
June	-9%	-3%	-3%	0%	-20%	-1%	0%	-20%	6%	-31%	2%	1%	4%
July	-7%	-1%	-3%	6%	-14%	0%	4%	-18%	5%	-36%	51%	2%	8%
Year-to-date	-7%	2%	0%	8%	-8%	3%	4%	-19%	7%	-31%	88%	9%	7%

- In July 2026, inbound air traffic remained just below 2019 for a second consecutive month, falling by 1%. Domestic traffic stayed under 2019.
- Among international origin markets, long haul air traffic was up 6% while short haul air traffic saw a decline of 3%. Air traffic from Saudi Arabia rose significantly by 51% in July vs 2019, while the USA saw more moderate growth at 8%. Australia saw a 14% decline as air traffic continues to be affected by the Middle East conflict and the disruption caused to connecting flights. Air traffic to the UK from Canada was level with 2019.
- Short haul air traffic trailed 2019 levels in July, seeing a similar decline to June 2026. Italy and France saw the highest growth of short haul markets compared to 2019, 5% and 4% growth respectively. Air traffic from Spain also just surpassed 2019 levels by 2%. The Netherlands (-36%) and Germany (-18%) continued to see significant declines vs 2019.

Notes: Amadeus air traffic data refreshed 26/08/26. % 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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Destination city trends vs. previous year | Nottingham, Liverpool and Birmingham seeing strongest year-on-year growth in July 2026

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

Last 12 months	London	Manchester	Edinburgh	Birmingham	Bristol	Glasgow	Liverpool	Leeds	Nottingham	Newcastle upon Tyne
August	5%	-6%	11%	-8%	1%	-12%	10%	-8%	-16%	-13%
September	4%	-4%	11%	-6%	-2%	-4%	5%	-12%	-7%	-4%
October	6%	-4%	7%	-4%	3%	0%	19%	6%	-9%	-9%
November	8%	3%	18%	2%	6%	-11%	-22%	25%	27%	-11%
December	7%	-3%	12%	-4%	3%	-16%	18%	7%	-18%	-2%
January	12%	7%	15%	3%	-1%	6%	-1%	-1%	-12%	16%
February	6%	0%	12%	7%	3%	4%	3%	-4%	-13%	4%
March	6%	4%	16%	12%	4%	4%	13%	5%	3%	13%
April	2%	2%	9%	12%	2%	6%	12%	3%	2%	11%
May	3%	8%	11%	24%	13%	18%	-4%	15%	24%	9%
June	1%	6%	6%	15%	5%	10%	9%	3%	-1%	4%
July	4%	12%	3%	15%	11%	7%	15%	1%	15%	5%
Year-to-date	4%	6%	9%	13%	6%	9%	7%	4%	6%	9%

Top growing cities in July 2026 vs. July 2019

City	% change
Durham	221%
Bournemouth	88%
Shetland Islands	87%
Newquay	76%
Stornoway	68%
Islay	39%
Kirkwall	27%
Edinburgh	18%
Liverpool	8%

- In July 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 July 2026 all the top UK cities saw growth compared to the previous year with Nottingham, Liverpool and Birmingham all leading growth at 15%. Manchester (12%) and Bristol (11%) both also saw double digit year-on-year growth; the other top UK cities saw more moderate growth.
- Looking at cities which have seen the most growth in inbound air traffic in July 2026 vs. July 2019, Durham ranks first, followed by Bournemouth and Shetland Islands.

Notes: Amadeus air traffic data refreshed 26/08/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

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For more information, please contact

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