Amadeus Air Traffic Trends Monthly Update Data up to September 2026

VisitBritain/VisitEngland Research

November 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 **September 2026** is shown in this report and the data was extracted on 02/11/26.
- 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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September 2026 | Inbound air traffic to the UK rose in September 2026 vs 2025 as the positive trend for the year-to-date continues

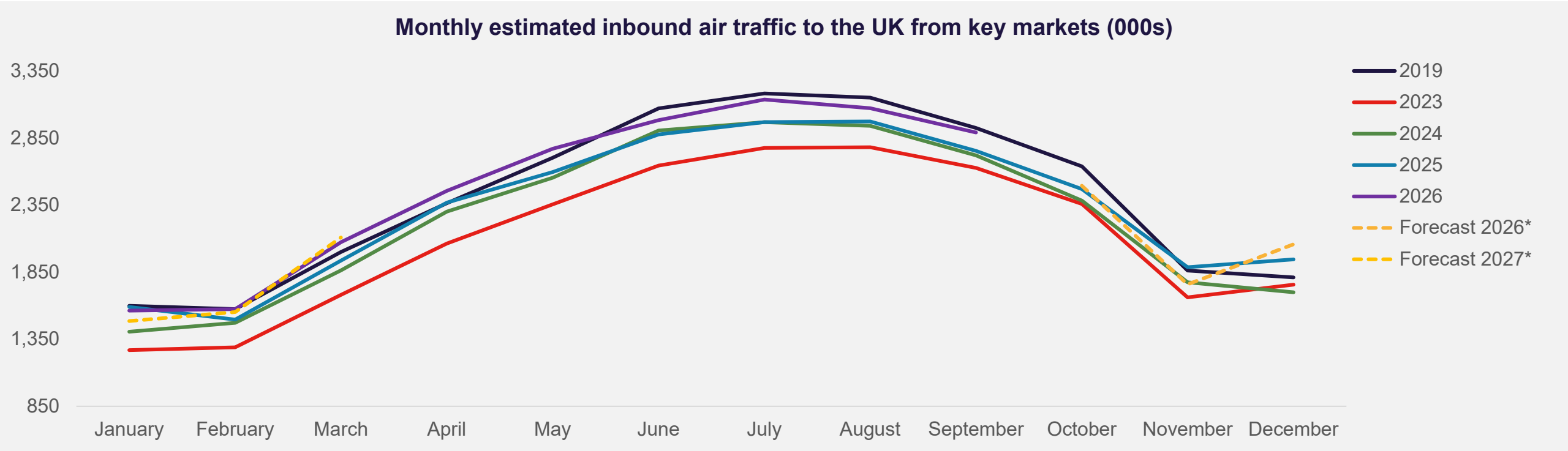
- In September 2026, inbound air traffic to the UK surpassed levels seen in September 2025; the eighth consecutive month of year-on-year (YoY) growth.
- Inbound air traffic to the UK in September 2026 **exceeded 2024 and 2023 but remained just under 2019 levels**. The forecast data for the rest of 2026 and start of 2027 is mixed as October and December are set to see YoY growth while there will be a decline in November. January and February 2027 forecasts show a dip in air traffic with YoY growth returning in March. The outlook compared to 2019 remains similarly uncertain as the next two months are expected to decline, while December will see growth.
- Inbound and domestic air traffic was above 2025 levels in September 2026. There are still differing trends at the inbound market level, **long haul markets** continued to see declines in September 2026 linked to the Middle East conflict, however, **short haul markets** saw stronger YoY growth than the previous month.
- Amongst the top UK cities for inbound air traffic **Glasgow, Birmingham** and **Nottingham** saw the most YoY growth in September 2026. Amongst all UK cities, Durham, Newquay and Stornoway demonstrated the strongest growth in September 2026 compared to September 2019.

Notes: Amadeus air traffic data refreshed 02/11/26. 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) | Air traffic above 2025 levels in September



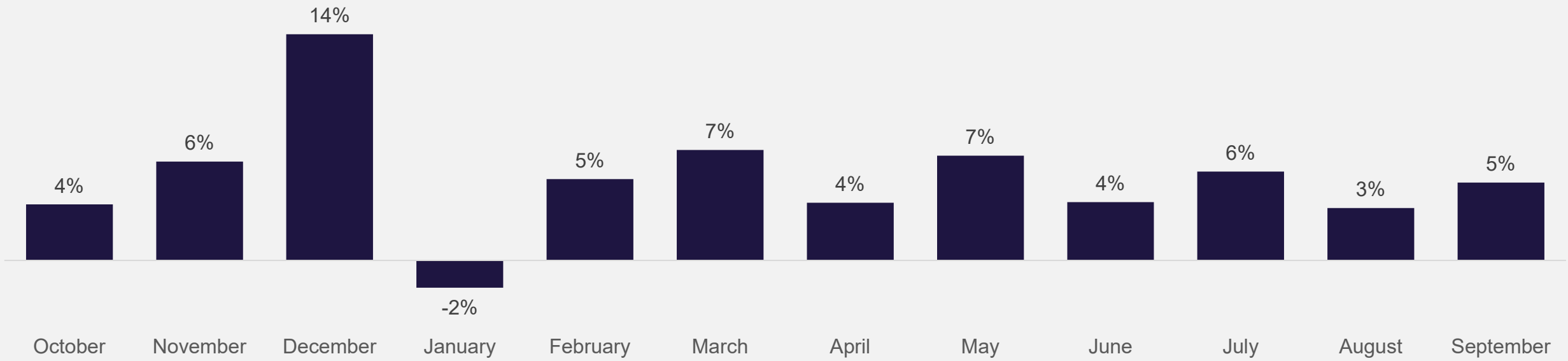
- In September 2026, inbound air traffic to the UK surpassed 2025, 2024 and 2023, however, continued to remain just below 2019 levels.
- All years demonstrate a consistent seasonal pattern, with air traffic beginning to dip after the peak of the early summer months.
- The forecast shows a mixed picture for inbound air traffic heading towards the end of 2026, October and December are set to see year-on-year growth while air traffic is expected to drop in November. The start of 2027 is forecast to be slow with January and February below previous year levels before an uplift in March. Air traffic to the UK will remain under 2019 levels for October and November, a brief upturn in December will be followed by further declines in the first two months of 2027 vs 2019.

Notes: Amadeus air traffic data refreshed 02/11/26. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA. *Forecast data is subject to change in future releases.

Inbound air traffic vs. previous year | Air traffic to the UK surpassed September 2025

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

Year-to-date: +4%



- September 2026 saw air traffic to the UK grow by 5% compared to September 2025, meaning there has now been YoY growth for eight consecutive months.
- The year-to-date so far in 2026 remains positive for air traffic to the UK with YoY growth of 4% from January to September 2026.

Notes: Amadeus air traffic data refreshed 02/11/26. % growth vs. previous year shown. The inbound total includes air traffic from Australia, Canada, France, Germany, Italy, Netherlands, Saudi Arabia, Spain, and the USA.

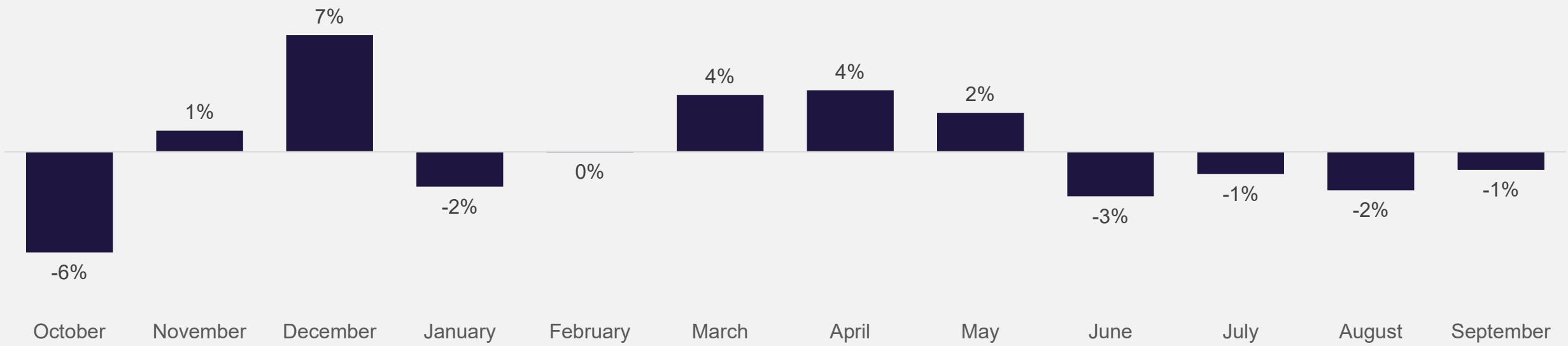
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Inbound air traffic vs. pre-COVID | Air traffic in September below 2019 levels

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

Year-to-date: 0%



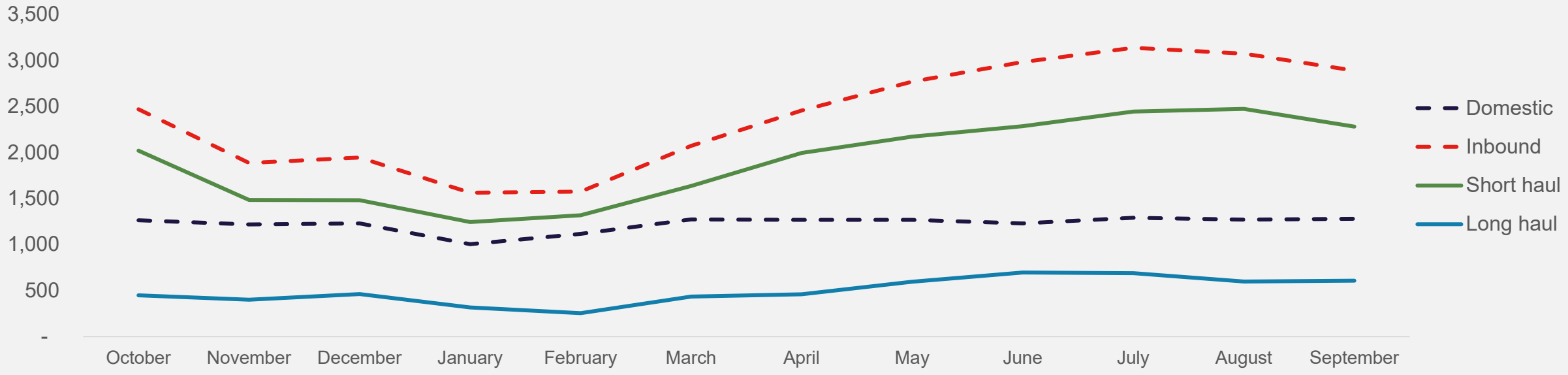
- Inbound air traffic to the UK in September 2026 continued to be under 2019 levels as traffic dipped by 1%. This was the fourth consecutive month of moderate declines since a 2% increase in May 2026.
- The recent declines have led to air traffic being level for the year-to-date (January-September) vs 2019, following a positive start to 2026.

Notes: Amadeus air traffic data refreshed 02/11/26. % 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) | Inbound air traffic passes the early summer peak



- Inbound air traffic has consistently demonstrated higher volumes vs. domestic, however, inbound air traffic looks to have passed the peak months as traffic begins to fall heading into the autumn months, whereas domestic air traffic remains flat.
- In September 2026, short haul air traffic dipped following its peak in August and July, in contrast long haul air traffic stayed level with last month.

Notes: Amadeus air traffic data refreshed 02/11/26. 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. previous year | Saudi Arabia and Spain led YoY growth

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
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	17%	14%	19%	2%	-2%	5%	23%	22%	30%	16%	3%	13%	3%
January	-5%	-2%	-3%	4%	11%	7%	3%	-3%	2%	-18%	26%	-4%	0%
February	3%	5%	5%	5%	1%	8%	4%	9%	7%	-3%	0%	5%	6%
March	5%	7%	7%	6%	24%	3%	3%	13%	6%	-2%	78%	9%	0%
April	6%	4%	5%	-3%	-6%	5%	-1%	-4%	12%	-5%	-27%	9%	-2%
May	4%	7%	10%	-5%	-10%	7%	1%	5%	11%	-3%	-5%	16%	-6%
June	-1%	4%	7%	-6%	-13%	9%	2%	-3%	7%	0%	-37%	11%	-4%
July	1%	6%	9%	-5%	-5%	5%	7%	-2%	8%	-5%	-5%	14%	-6%
August	0%	3%	6%	-5%	-14%	4%	1%	-4%	6%	-3%	-1%	10%	-6%
September	6%	5%	8%	-4%	-16%	-2%	3%	0%	9%	1%	15%	11%	-3%
Year-to-date	**2%**	**4%**	**7%**	**-3%**	**-7%**	**5%**	**3%**	**1%**	**8%**	**-4%**	**-1%**	**10%**	**-4%**

- September 2026 saw inbound and domestic air traffic surpass 2025 levels by 5% and 6%, respectively. Within inbound air traffic, short haul markets grew 8%, an increase on the 6% YoY growth seen in August. Long haul air traffic continues to be below previous year levels due to the disruption from the Middle East conflict.
- Saudi Arabia (+15%) was the only long haul market to see YoY growth in September 2026, following five months of consistent declines linked to the Middle East conflict. Air traffic from Australia (-16%) to the UK continues to see declines as connecting routes remain effected by the conflict. The USA (-3%) and Canada (-2%) saw more moderate YoY declines.
- Spain (+11%) leads YoY growth of short haul markets, with Italy following at 9% growth. France saw 3% YoY growth, while Netherlands reversed two months of declines to grow 1%. Air traffic from Germany was similar to 2025 levels.

Notes: Amadeus air traffic data refreshed 02/11/26. % 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 | Saudi Arabia leads growth 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
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	9%	7%	8%	6%	-16%	3%	23%	6%	12%	-25%	131%	14%	5%
January	-15%	-2%	-7%	23%	34%	10%	11%	-29%	-5%	-40%	189%	6%	12%
February	-6%	0%	-2%	11%	5%	-1%	12%	-25%	2%	-31%	121%	11%	8%
March	-5%	4%	2%	13%	27%	6%	-2%	-17%	2%	-27%	184%	18%	6%
April	-5%	4%	2%	12%	-16%	5%	-1%	-20%	15%	-25%	70%	12%	15%
May	-10%	2%	3%	0%	-14%	1%	1%	-15%	15%	-33%	169%	12%	-1%
June	-9%	-3%	-3%	-1%	-19%	-1%	0%	-20%	6%	-31%	2%	1%	3%
July	-7%	-1%	-3%	5%	-12%	0%	3%	-18%	4%	-34%	67%	2%	5%
August	-8%	-2%	-3%	2%	-17%	5%	2%	-21%	8%	-34%	56%	0%	1%
September	-2%	-1%	-3%	9%	-19%	-3%	-3%	-19%	7%	-32%	130%	1%	11%
Year-to-date	**-7%**	**0%**	**-2%**	**6%**	**-10%**	**2%**	**2%**	**-20%**	**6%**	**-32%**	**90%**	**6%**	**6%**

- In September 2026, inbound air traffic continued to be below 2019 levels with a dip of 1%. Domestic traffic also remained below 2019.
- Among international origin markets, long haul air traffic saw growth of 9%, while short haul air traffic dropped by 3%. There was strong growth in air traffic from Saudi Arabia (+130%) in September vs 2019 seeing its largest growth since May 2026. The USA saw a double digit increase of 11%. Australia saw a 19% decline as air traffic remains impacted by the Middle East conflict and the disruption caused to connecting flights. Air traffic to the UK from Canada dipped below previous year levels.
- Short haul air traffic stayed under 2019 levels in September, seeing a 3% decline for a fourth consecutive month. Italy continues to see the highest growth of short haul markets compared to 2019 at 7%. Spain (+1%) saw air traffic to the UK rise slightly, whereas France dropped 3%. The Netherlands (-32%) and Germany (-19%) continued to see significant declines vs 2019.

Notes: Amadeus air traffic data refreshed 02/11/26. % 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 | Glasgow, Birmingham and Nottingham led growth in September 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	Newcastle upon Tyne	Leeds	Nottingham
October	6%	-4%	7%	-4%	3%	0%	19%	-9%	6%	-9%
November	8%	3%	18%	2%	6%	-11%	-22%	-11%	25%	27%
December	17%	8%	24%	8%	15%	-6%	34%	11%	20%	-8%
January	0%	-4%	4%	-9%	-13%	-5%	-14%	3%	-12%	-22%
February	6%	0%	12%	7%	3%	4%	3%	4%	-4%	-13%
March	6%	4%	16%	12%	4%	4%	13%	13%	5%	3%
April	2%	2%	9%	12%	2%	6%	12%	11%	3%	2%
May	3%	8%	11%	25%	13%	18%	-4%	9%	15%	24%
June	1%	6%	6%	15%	5%	10%	9%	4%	3%	0%
July	3%	12%	4%	17%	9%	9%	15%	7%	-1%	16%
August	2%	6%	5%	10%	4%	11%	10%	5%	-1%	-1%
September	3%	6%	5%	13%	11%	16%	0%	7%	-8%	13%
Year-to-date	**3%**	**5%**	**7%**	**12%**	**5%**	**10%**	**6%**	**7%**	**1%**	**5%**

Top growing cities in September 2026 vs. September 2019

City	% change
Durham	166%
Newquay	118%
Stornoway	101%
Bournemouth	79%
Kirkwall	41%
Edinburgh	37%
Inverness	19%
Shetland Islands	18%
Liverpool	16%

- In September 2026, the top ranked UK cities by air traffic were London, Manchester and Edinburgh. When examining the YoY growth in air traffic of the top ranked cities, in September 2026 Glasgow led growth at 16% followed by Birmingham (+13%) and Nottingham (+13%). Bristol also saw double digit YoY growth at 11%, while Newcastle (+7%), Manchester (+6%), Edinburgh (+5%) and London (+3%) rose more moderately. Air traffic to Liverpool was similar to September 2025. Leeds was the only top UK city to see a decline in September, falling by 8%.
- Looking at cities which have seen the most growth in inbound air traffic in September 2026 vs. September 2019, Durham ranks first, followed by Newquay and Stornoway.

Notes: Amadeus air traffic data refreshed 02/11/26. 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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