

The UK Travel Market 2026

How British travellers are flying more frequently, spending more, and changing how they get to the airport.

DATA SOURCE

ONS International Passenger Survey

FORECAST HORIZON

2026

REPORT DATE

January 2026

53%

of all UK flights in 2026
will be taken by those
flying 5+ times a year

86%

growth in the 5–10
trips/year cohort from
2022 to 2026

9.2%

projected increase in total
overseas visits above the
2019 pre-pandemic peak
by 2026

58%

fall in once-a-year flyers
from 2022 to 2026

FOREWORD

The shape of UK travel is changing —

fast

The story of UK outbound travel in 2026 is not simply one of post-pandemic recovery. It is a story of structural change: fewer people flying rarely, more people flying frequently, higher spend per trip, and a shift in how travellers get to the airport. This report draws on ONS International Passenger Survey data to trace those changes and project where the market is heading.

Pre-pandemic, the UK outbound travel market was dominated by infrequent travellers — the majority of flights were taken by people making one to four overseas trips a year. That world is receding. By 2026, for the first time, the majority of UK overseas flights are projected to be taken by people who fly five or more times a year. This is a seismic shift in who the travelling public actually is.

At the same time, total flight volumes are set to exceed pre-pandemic highs by a meaningful margin — projected to reach **89.4 million flights** in 2026, versus 79.5 million in 2019. The market is growing, but growth is being driven disproportionately by a smaller, higher-frequency segment of travellers. Understanding this cohort — and how their needs differ from the once-a-year holidaymaker — is the central challenge for anyone operating in the UK travel market.

The occasional British holidaymaker is no longer the centre of gravity for the outbound travel market. Frequent flyers have moved from a niche to the majority of flights — and every part of the travel ecosystem needs to respond to that shift.

SEAMUS MCCAULEY, HEAD OF PUBLIC AFFAIRS — HOLIDAY EXTRAS

Data sources and approach

This report is based primarily on Holiday Extras proprietary consumer research into airport transport and spend behaviour, combined with published volume data from the ONS International Passenger Survey. The structural market shifts identified here are grounded in Holiday Extras' direct research with UK travellers.

Primary data source	Holiday Extras proprietary consumer survey, January 2026
Consumer research base	UK adults with overseas travel experience
Consumer research fieldwork	January 2026
Flight & visit volume data	ONS International Passenger Survey
ONS source URL	https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism#datasets
Flight volume note	These figures differ materially from CAA numbers, which double-count passengers. ONS IPS figures are used throughout.
Historical range	2019–2024 (actuals); 2025–2026 (estimates/projections)
Cohort segmentation	By number of overseas trips taken per person per year: 1, 2, 3, 4, 5–10, 11–20, 20+

Total UK overseas travel has surpassed pre-pandemic highs

UK outbound travel has not merely recovered from the pandemic — it has exceeded its previous peak. Total overseas visits in 2025 have already surpassed the 2019 record, and the trajectory points firmly upward into 2026.

Total overseas visits by UK residents stood at **93.1 million in 2019** — the pre-pandemic high. By 2025, that figure had reached an estimated **96.6 million**, surpassing the previous record. By 2026, visits are projected to reach **101.6 million** — a **9.2% increase** on the 2019 peak. The pandemic dip to 23.8 million in 2020 and 19.1 million in 2021 now looks like a temporary interruption to a long-term growth trend.

YEAR	TOTAL OVERSEAS VISITS	TOTAL OVERSEAS FLIGHTS
2019	93,086,000	79,534,000
2020	23,827,000	No data
2021	19,141,000	No data
2022	70,951,000	No data
2023	86,204,000	75,857,000
2024	94,612,000	80,480,000
2025 (est.)	96,615,469	85,987,768
2026 (proj.)	101,616,548	89,422,563

Total overseas flights are similarly on an upward trajectory. The 2026 projection of **89.4 million** represents a **12.4% increase** over the 2019 figure of 79.5 million — meaning the UK will have

materially more flights than before the pandemic, not just the same number. Demand for air travel among UK residents is structurally higher than pre-pandemic levels.

Total UK overseas visits in 2025 have **already exceeded the pre-pandemic 2019 peak**, and are projected to reach **101.6 million** in 2026 — a 9.2% increase on 2019's record high.

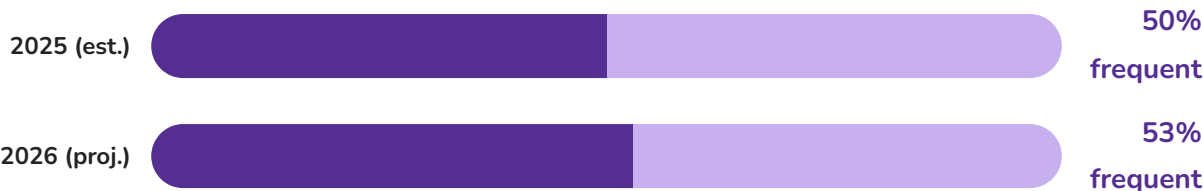
CHAPTER 2

Frequent flyers now dominate the market — a structural shift

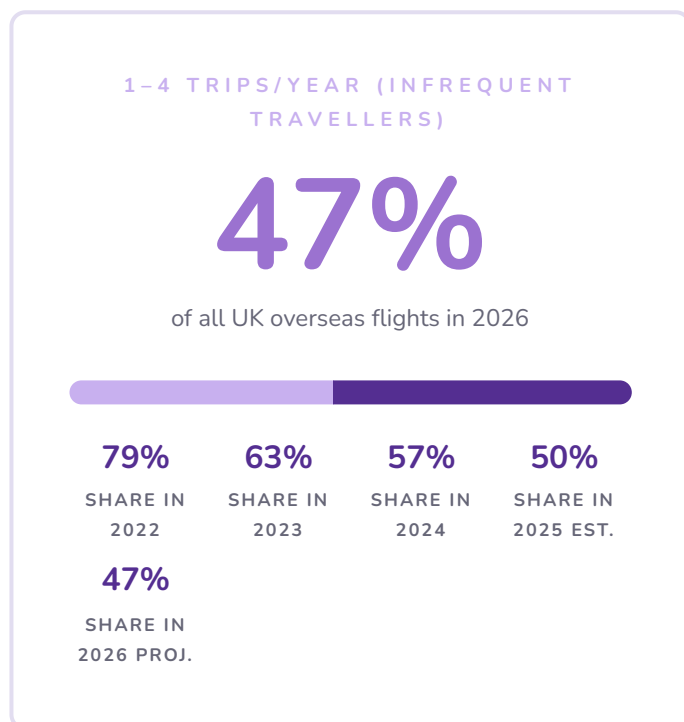
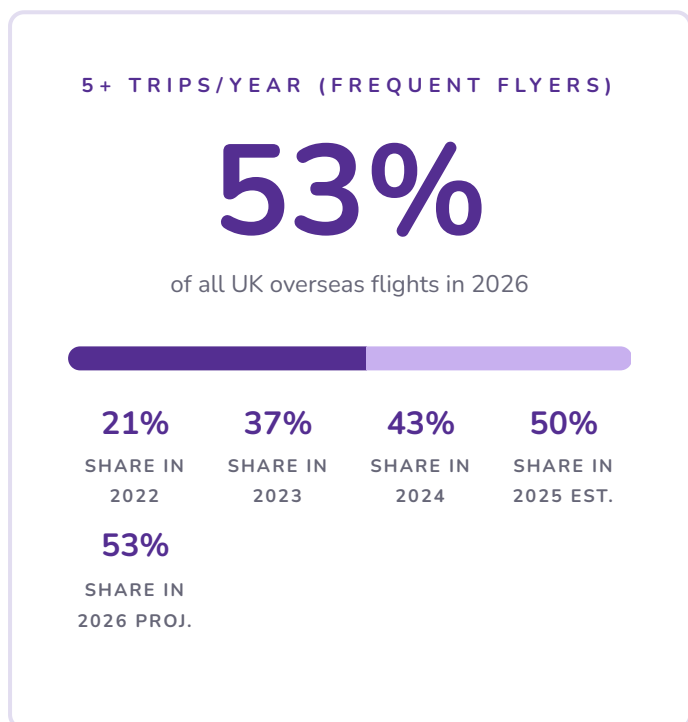
The most significant change in UK outbound travel is not in total volumes, but in who is flying. People taking five or more overseas trips a year have grown from a small minority to the majority of all flights. This is a structural, not cyclical, change.

In 2022, travellers taking **5 or more overseas trips per year** accounted for just **21% of all UK overseas flights**. By 2024 that had risen to 43%. The 2025 estimate puts it at 50% — parity with infrequent travellers — and the 2026 projection has frequent flyers accounting for **53% of all flights**. The majority of UK air travel is now taken by people who fly at least five times a year.





Conversely, the **1–4 trips/year cohort** — which historically made up the majority of UK flights — has seen its share fall from **79% in 2022** to a projected **47% in 2026**. In absolute terms, this cohort's total trips have also declined, from 55.7 million in 2022 to a projected 48.3 million in 2026. The infrequent traveller is not disappearing, but they are no longer the dominant force in the market.

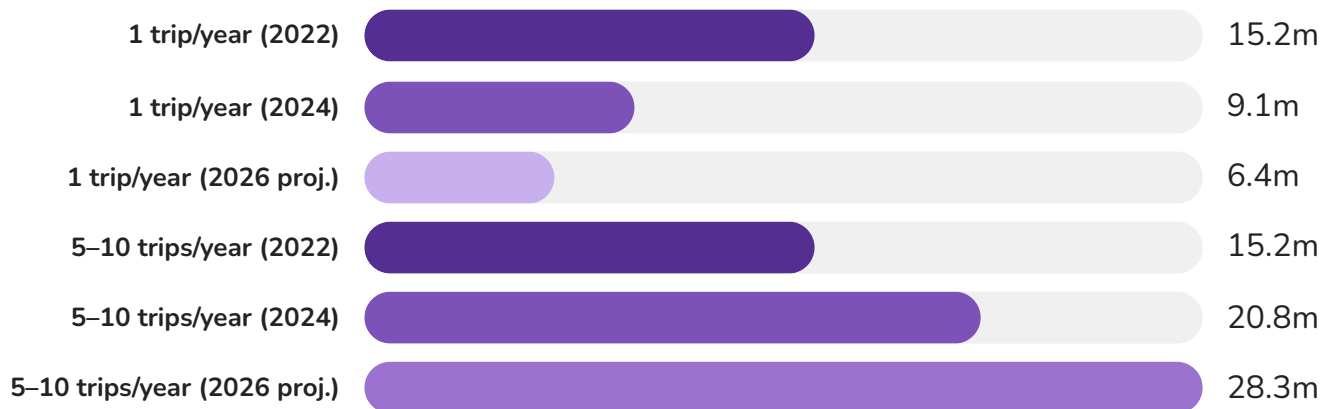


Frequent flyers (5+ trips/year) will account for **53% of all UK overseas flights in 2026** — up from just 21% in 2022. For the first time, they outnumber infrequent travellers in the air.

Once-a-year flyers are disappearing while the 5–10 cohort surges

Behind the headline shift from infrequent to frequent travellers lies a more detailed story. The single-trip cohort is in sharp absolute decline, while the 5–10 trips/year group has nearly doubled in size, becoming the largest individual cohort in the market.

The **once-a-year flyer** — taking exactly one overseas trip per year — was the largest single cohort in 2022 at **15.2 million trips**. By 2024 that had fallen to **9.1 million**, and the 2026 projection stands at just **6.4 million** — a **58% fall** over four years. No other cohort has declined so sharply in absolute terms. This is the fastest-shrinking segment in UK outbound travel.



At the other end of the spectrum, the **5–10 trips/year cohort** has grown from 15.2 million in 2022 to a projected **28.3 million in 2026** — an **86% increase**. This makes it the **single largest cohort by volume** in 2026, accounting for **28% of all overseas flights**. The 11–20 trips/year cohort has also grown dramatically: recorded at zero in 2022, it stands at an estimated **17.5 million** by 2026 (17% of all flights). This likely reflects a combination of genuine growth and a reclassification in the data between 2022 and 2023, and should be interpreted with some caution.

COHORT (TRIPS/YEAR)	2022	2023	2024	2025 EST.	2026 PROJ.	% OF FLIGHTS 2026
1	15,203,786	11,755,091	9,124,008	8,319,140	6,409,949	6%
2	20,271,714	17,414,949	15,867,841	13,613,138	15,836,345	16%
3	12,163,028	13,061,212	14,281,057	14,747,567	12,442,843	12%
4	8,108,686	12,190,465	14,281,057	12,100,568	13,574,010	13%
5–10	15,203,786	16,326,515	20,826,541	22,688,564	28,279,188	28%
11–20	0*	6,748,293	12,297,576	17,583,637	17,533,096	17%
20+	0*	8,707,475	7,933,920	7,562,855	7,541,117	7%

*The zero values for 11–20 and 20+ cohorts in 2022 likely reflect a data or classification change between survey years rather than the genuine absence of these travellers. The rapid apparent emergence of these cohorts from 2023 onwards warrants analytical caution, though the directional trend of growth in high-frequency travel is consistent with other indicators.

The **5–10 trips/year cohort** is now the **single largest segment** in UK outbound travel at 28% of all flights, having grown **86%** since 2022 — while once-a-year flyers have fallen **58%** over the same period.

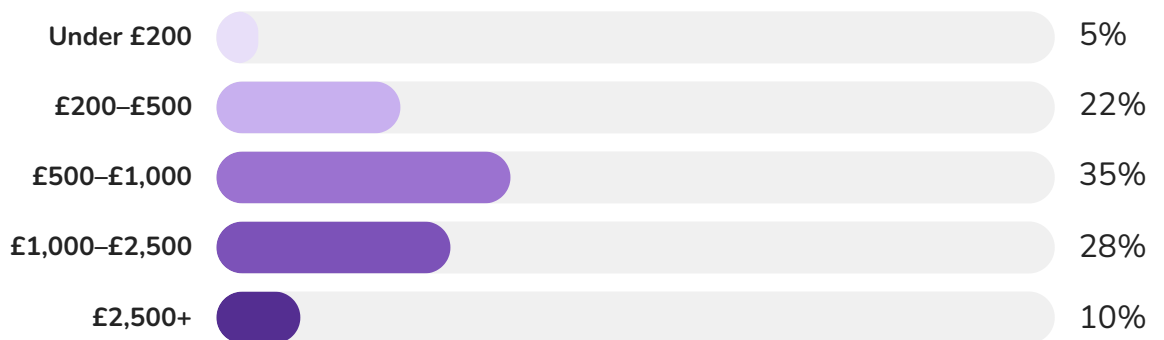
CHAPTER 4

Spend per trip is rising — £1k–£2.5k

becomes the new modal bracket

As the profile of the UK traveller shifts toward higher-frequency, more experienced travellers, spend per person per trip is rising. By 2026, the most common spend bracket has shifted upward for the first time.

In 2022, the **modal spend per person per overseas trip** was **£500–£1,000**, followed by **£200–£500**. These brackets reflected a market still dominated by cost-conscious, infrequent holidaymakers. By 2026, for the first time, the most commonly reported expected spend per person per trip is **£1,000–£2,500** — with £500–£1,000 in second place. This upward shift in the spend distribution reflects both inflation and the changing composition of who is travelling: more frequent flyers tend to travel for a wider range of purposes, including business and higher-end leisure, and are less price-sensitive on trip costs.



The shift toward higher spend per trip has significant implications for travel ancillaries. Travellers spending over £1,000 per person per trip are materially more likely to invest in premium airport services — lounges, pre-booked parking, travel insurance — as these represent a smaller share of total trip cost. The £1k–£2.5k traveller is a different commercial proposition from the £200–£500 holidaymaker who was the core customer a few years ago.

For the first time, the **most common spend bracket** per person per overseas trip in 2026 is **£1,000–£2,500** — overtaking the £500–£1,000 bracket that dominated in 2022.

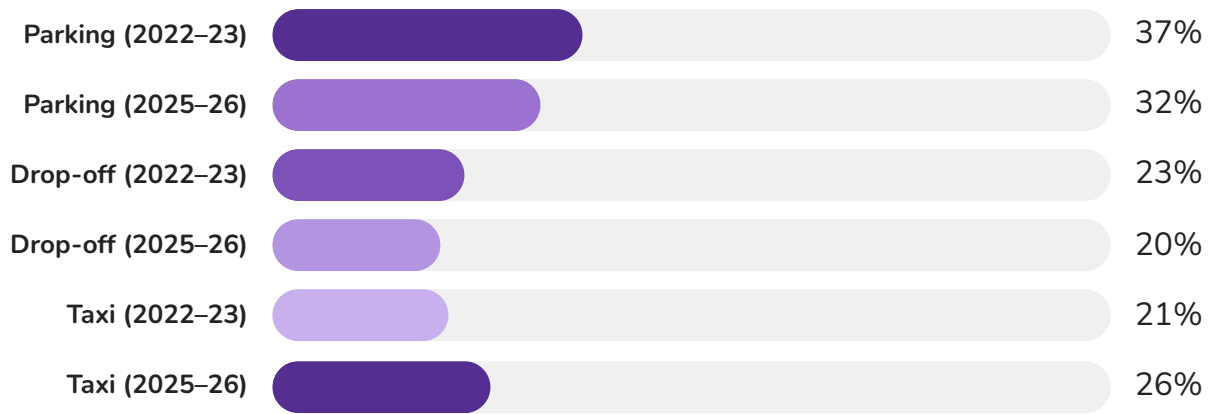
Taxis are winning the airport transfer battle as parking and drop-offs decline

How travellers get to the airport is shifting. Parking is losing share, drop-offs by friends and family are falling as airport charges rise, and taxis are the clear beneficiary.

Airport **parking** remains the most common way for UK travellers to reach their departure airport, and its headline share shift — from **37% to 32%** — tells only part of the story. The overall figure masks a significant structural change within the parking market itself: the proliferation of customer review platforms has made it increasingly difficult for low-quality and rogue parking operators to survive. Sites that relied on information asymmetry — taking bookings, pocketing fees and providing little in return — are being steadily driven out of a market where poor service is now immediately and publicly visible. What is left is a consolidated base of established, reputable providers. The parking market is smaller in overall share terms, but materially better quality. It fell from 2023 to 2024, then recovered slightly in 2025 — consistent with a shakeout followed by stabilisation around reliable operators.

Being dropped off by friends or family has also declined — from 23% to 20% — a trend likely accelerated by the introduction and increase of airport drop-off charges at major UK airports, which have made the 'free' lift to the airport substantially less free.

The clear beneficiary of both trends is the **taxi** (including ride-hailing services such as Uber). Taxi use for airport travel has risen from **21% to 26%** — an increase of five percentage points. For frequent flyers in particular, the convenience and predictability of a taxi or ride-hail is increasingly preferred over the logistical complexity of parking or the social cost of asking for a lift.



Taxi use for airport travel has risen from 21% to 26%, while parking's share has moved from 37% to 32% — a shift that partly reflects the exit of rogue and low-quality operators from a market where ubiquitous customer reviews have made poor service impossible to hide. The parking market is consolidating around established, reliable providers.

Rising airport drop-off charges have quietly reshaped the transfer market. What used to be a free option for millions of travellers now costs £5, £7, even £10 at many airports — and that nudge is showing up clearly in the data.

SEAMUS MCCAULEY, HEAD OF PUBLIC AFFAIRS — HOLIDAY EXTRAS

IMPLICATIONS

What the shift means for the UK

travel market

The data points to a fundamental reorientation of UK outbound travel. The industry built around the annual family holiday is giving way to one shaped by the needs and preferences of a smaller, more frequent, higher-spending travelling class.

Design for the frequent flyer, not the occasional holidaymaker

1

With 5+ trip-per-year travellers now accounting for the majority of flights, products, services and loyalty mechanics need to reflect the needs of people for whom travel is a regular part of life — not an annual treat.

Premium positioning is increasingly justified

2

The rise of £1k–£2.5k as the modal spend bracket means the core UK traveller has more budget and more appetite for quality. Airport lounges, premium parking and higher-tier travel insurance are natural upsells to this customer.

Parking's share decline conceals a quality improvement

3

The fall from 37% to 32% partly reflects rogue and low-quality operators being driven out by the transparency of customer reviews. The market is consolidating around established, reliable providers — which is a structural opportunity for operators with strong reputations and consistent service standards.

Taxi and ride-hail partnerships are a growing opportunity

4

With taxi use up five percentage points to 26%, partnerships between airport service providers and ride-hail platforms offer a significant and growing channel to reach travellers at the point of journey planning.

Watch the 11–20 trips/year cohort

5

This cohort grew from effectively zero in the 2022 data to 17.5 million trips in 2026. Even discounting data classification changes, the directional growth is significant. This is a high-value segment with very different needs from any other cohort.

Volume recovery masks a changing market mix

6

Total visits and flights are back above pre-pandemic highs, but the market that has returned is structurally different. Strategies built on 2019 assumptions about customer behaviour, price sensitivity and product preference may need fundamental revision.

FREQUENT FLYER
SHARE 2026

53%

of all UK overseas
flights taken by those
flying 5+ times/year

GROWTH IN 5-10
COHORT

86%

increase in this cohort
from 2022 to 2026

DECLINE IN ONCE-
A-YEAR FLYERS

58%

fall in the single-trip
cohort from 2022 to
2026

TAXI GROWTH

+5pp

rise in taxi use for airport
transfers over the period

ABOUT

About Holiday Extras

Holiday Extras is the UK's leading provider of airport travel services, including airport parking, hotels, lounges and transfers. Each year, millions of UK travellers use Holiday Extras to make the journey to and from the airport easier.

This research report was commissioned to better understand the structural shifts taking place in UK outbound travel, and to provide authoritative analysis of how the market is changing for travellers, airlines and airport service providers alike.

The flight and visit volume data in this report is sourced from the ONS International Passenger Survey. Holiday Extras consumer research on spend and airport transport was conducted in January 2026.

For press enquiries, please contact press@holidayextras.com

Research note

ONS International Passenger Survey data and Holiday Extras Jan26 surveys are used throughout. Estimates and projections for 2025 and 2026 are based on trend extrapolation from ONS datasets and Holiday Extras analysis.

© Holiday Extras 2026. All rights reserved.

The UK Travel Market 2026

Holiday Extras Research Report · January 2026

Research conducted via ONS International Passenger Survey · UK outbound travel data 2019–2026
[holidayextras.com](https://www.holidayextras.com)