

September 2026: Airport traffic diverges; resident-demand evidence remains incomplete

UK travel industry report · September 2026 · Perspective: Airports and air connectivity · Published 14 October 2026

September 2026 versus September 2025 brought passenger growth at Stansted and a decline at Heathrow, but airport throughput is not UK resident outbound demand.^[1] ([mediacentre.heathrow.com])(https://mediacentre.heathrow.com/pressrelease/detail/26355?utm_source= TravelSpy's stored resident-travel series end in 2023, as documented in the dated evidence-inventory note reproduced in this report's Data gaps; historical demand evidence is therefore kept separate from current airport and sentiment context. [1]

Headlines

- September 2026 versus September 2025: Stansted passengers increased 6.4%, while Heathrow passengers declined 2.3%.¹² ([mediacentre.heathrow.com])(https://mediacentre.heathrow.com/pressrelease/detail/26355?utm_source=
- Stored CAA data record 299,351,416 UK airport passengers in 2025, up 2.35% year-on-year: annual throughput context, not September 2026 resident demand.³⁴[1]
- easyJet reported more than 39 million UK seats across summer 2026 and 53 new routes: seasonal supply, not September journeys completed.⁵ ([easyjet.com])(https://www.easyjet.com/en/news/airline/story/easyjets-busiest-day-ever-takes-off))
- September consumer confidence stood at -13, while the Major Purchase Index was -8; neither measures holiday bookings.⁶ ([nielseniq.com])(https://nielseniq.com/global/en/news-center/2026/consumer-confidence-up-one-point-in-september-to-13/))
- ONS warns against comparing its composite annual 2024 tourism estimates directly with earlier or later single years.⁷ ([ons.gov.uk])(https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/improvin

Key figures

299,351,416 passengers₃ UK airport passengers — annual context 2025 · Released on 13 February 2026, this CAA annual total includes inbound, non-resident and connecting traffic and is not UK resident outbound demand. [R152][I1]	19,203,000 visits₈ UK resident overseas visits — stale historical baseline 2023-Q4 · Released on 17 May 2024, this quarterly estimate describes October–December 2023 and cannot establish September 2026 demand. [R194]	£15,920,000,000₉ UK resident overseas spending — stale historical baseline 2023-Q4 · Released on 17 May 2024, this quarterly estimate describes October–December 2023 expenditure, not September 2026 spending or current holiday prices. [R330]
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UK outbound travel market

This September 2026 report uses a research cut-off of 14 October 2026, including October releases describing September activity. TravelSpy’s stored ONS series end in 2023, as documented in the dated evidence-inventory note [I1], reproduced in full under Data gaps. This is a limitation of the stored evidence, not a claim that public ONS statistics stop in 2023. [I1] ONS’s September methodological update discusses subsequently published 2024 estimates.⁷

([ons.gov.uk](https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/improving

The stored quarterly records show 19,203,000 overseas visits and £15,920,000,000 of spending in October–December 2023, both released on 17 May 2024. Against October–December 2022, visits increased by 20.03% and spending by 25.16%, with both changes rechecked using the stored-record calculator. These are stale historical baselines, not estimates for September 2026, and the expenditure change is not a measure of holiday-price inflation.⁸¹⁰⁹¹¹

Comparability is a separate constraint from publication lag and storage coverage. ONS’s update, released on 4 September 2026, describes corrections to destination-airport assignment and package-cost currency processing. It warns that annual 2024 combines old and new survey designs and should not be compared directly with earlier or later single-year estimates; it also identifies quality concerns affecting Great Britain residents’ overseas spending.⁷

([ons.gov.uk](https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/improving

Our recommendation is to preserve those methodological breaks rather than construct a continuous growth narrative from incompatible observations.

Airports and air travel

The stored CAA annual series records 299,351,416 UK airport passengers in 2025, released on 13 February 2026, compared with 292,488,416 in 2024, released on 13 February 2025. The calculator-confirmed like-for-like increase is 2.35% year-on-year.³⁴ The stored series ends in 2025 and contains annual observations only; no September 2026 UK-wide monthly total is stored. These coverage statements are documented by the report's evidence-inventory note, rather than inferred from an individual observation. Airport totals include inbound, non-resident and connecting traffic, so they are not resident holiday departures. [11]

Airport releases published on 12 October provide narrower but more timely observations. Heathrow's September 2026 table reports terminal passengers of 7,180 in units of thousands, down 2.3% versus September 2025. Stansted reports 2.88m passengers, up 6.4% over the same comparison period. These are publisher-reported changes, not calculations from TravelSpy records.¹²

([mediacentre.heathrow.com])(https://mediacentre.heathrow.com/pressrelease/detail/26355?utm_source=op)

Supply has a different reference period: easyJet's 1 September release describes more than 39 million UK seats across summer 2026, not September passengers.⁵

([easyjet.com])(<https://www.easyjet.com/en/news/airline/story/easyjets-busiest-day-ever-takes-off>) Public CAA monthly statistics also exist outside the stored inventory: its June 2026 page states that June data were complete as of 22 September 2026. That is a completion date, not September traffic or proof that June was the latest available month.¹²

([caa.co.uk])(<https://www.caa.co.uk/data-and-analysis/uk-aviation-market/airports/uk-airport-data/uk-airport-data-2026/june-2026/>)

Consumer sentiment and search

The GfK Consumer Confidence Barometer powered by NIM, released on 25 September 2026, reported its overall index at -13. The Major Purchase Index was -8 and the Savings Index +27. Fieldwork covered 2,000 UK individuals aged 16+ between 1 and 14 September. These are household attitudes rather than holiday bookings, and the fieldwork cannot capture reactions throughout the month.⁶ ([nielseniq.com])(<https://nielseniq.com/global/en/news-center/2026/consumer-confidence-up-one-point-in-september-to-13/>)

Our interpretation is cautious: the combination does not justify assuming stronger travel conversion. Testing affordability messages would be a commercial response to the survey, not evidence that holidaymakers are already trading down.⁶

([nielseniq.com])(<https://nielseniq.com/global/en/news-center/2026/consumer-confidence-up-one->

point-in-september-to-13/))

TravelSpy's evidence-inventory note, dated 14 October 2026 and reproduced under Data gaps, records no valid, unambiguous stored UK series for VisitBritain sentiment, ABTA research or Google Trends. This describes stored coverage only; it does not establish that public research from those organisations is unavailable. [I1] Accordingly, this report provides no stored estimate of changing holiday intentions or destination-search growth.

Google Trends measures normalised relative search interest, not traveller counts or bookings.¹³ ([support.google.com](https://support.google.com/trends/answer/4365533?hl=en)) No year-on-year search comparison is presented. The external confidence survey is retained as household context, not substituted for the missing travel-specific series. [I1]⁶ ([nielseniq.com](https://nielseniq.com/global/en/news-center/2026/consumer-confidence-up-one-point-in-september-to-13/))

Airports and air connectivity

Passenger throughput and useful connectivity answer different commercial questions. The stored CAA annual total supplies historical airport-activity context, but its period and aggregation cannot establish September route choice or departure frequency.³ The inventory contains no airport monthly, route-frequency or comparable seat-capacity series, and its airport-passenger caveat explicitly includes inbound and connecting traffic. These are inventory-level findings, documented in the dated note, not conclusions drawn from R152 alone. [I1] We recommend assessing passengers carried, services available for sale and resident travel behaviour separately.

Hub composition matters. Heathrow reported almost 1.4 million transfer passengers in September 2026. Its monthly market table showed Middle East passenger traffic down 20.1% year-on-year and Asia / Pacific traffic up 3.3% year-on-year, comparing September 2026 with September 2025. These airport market categories do not identify UK residents' final holiday destinations.¹

([mediacentre.heathrow.com](https://mediacentre.heathrow.com/pressrelease/detail/26355?utm_source=op

Our planning implication is to examine itinerary exposure and alternative routings before treating a regional traffic decline as weaker consumer preference. The useful question is which journeys remain practically accessible, not simply whether an airport's aggregate total rose or fell.

Regional supply requires a separate assessment. easyJet's summer release reports eight additional Airbus A320 family aircraft across UK bases including Bristol, Newcastle, Birmingham, Manchester, Liverpool and Glasgow.⁵

([easyjet.com](https://www.easyjet.com/en/news/airline/story/easyjets-busiest-day-ever-takes-

off)) For operators and destinations, we recommend checking schedules against catchment access, accommodation availability and trip duration. A summer fleet announcement is not sufficient evidence for winter frequencies or package profitability; those require additional observations before commercial commitments are made.

Physical expansion must also remain distinct from capacity delivered. Stansted reported that removal of its airside bussing facility and link bridge cleared the way for terminal-extension foundations.² ([mediacentre.stanstedairport.com](https://mediacentre.stanstedairport.com/late-summer-sun-drives-record-breaking-september-at-london-stansted/)) We interpret this as construction progress, not evidence that the extension supplied September capacity. Programmes dependent on the project should remain conditional on delivery and confirmed airline schedules; no capacity uplift from the works is quantified here.

Operational resilience completes the assessment. AP's 21 September report described a Prestwick technical issue; Cirium counted 227 UK arriving or departing flights cancelled by late afternoon, a contemporaneous snapshot rather than a final incident total.¹⁴ ([apnews.com](https://apnews.com/article/britain-air-traffic-control-scotland-disruption-8c93444a3e4ec6f17bdf8596925302b3)) Our implication is to assess recovery options alongside route availability. No change in resident demand is inferred from that incident.

Outlook and implications for travel businesses

The evidence supports conditional planning rather than a national demand forecast. September's contrasting airport results motivate assessing departure-airport and destination combinations separately. If divergence persists, operators and OTAs should avoid applying one growth assumption across programmes. This is an analytical implication, not a prediction of resident demand.¹²

([mediacentre.heathrow.com](https://mediacentre.heathrow.com/pressrelease/detail/26355?utm_source=op

If household caution persists, test transparent total-trip pricing and alternative departure dates before broad inventory commitments. The confidence survey motivates that scenario but does not establish delayed holiday bookings or trading down.⁶

([nielseniq.com](https://nielseniq.com/global/en/news-center/2026/consumer-confidence-up-one-point-in-september-to-13/)) Advisors should keep affordability hypotheses separate from measured sales performance.

If disruption recurs, alternative-routing and traveller-communication plans would be prudent; the Prestwick incident is an operational example, not a cancellation forecast.¹⁴

([apnews.com](https://apnews.com/article/britain-air-traffic-control-scotland-disruption-

8c93444a3e4ec6f17bdf8596925302b3)) Where programmes depend on seasonal supply announcements, verify operating dates and frequencies before assuming year-round access.⁵ ([easyjet.com])(<https://www.easyjet.com/en/news/airline/story/easyjets-busiest-day-ever-takes-off>))

Our next evidence priority is refreshed resident-travel data with explicit methodological continuity, followed by comparable monthly airport and route observations. ONS's warning about annual 2024 comparability remains relevant to that assessment.⁷

([ons.gov.uk])(<https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/improving>)

Until the documented storage gaps are addressed, retain the 2023 resident figures as historical background and the 2025 airport total as annual throughput context. Neither provides a September 2026 UK outbound market growth rate. [I1]⁸⁹³

Data gaps and limitations

- [I1] TravelSpy evidence-inventory and methodology note — September 2026 report; snapshot checked on 14 October 2026. This internal reference is reproduced here in full for readers. Provenance: industry_evidence_lookup, action overview, market GB, report_month 2026-09, data_status partial. ONS coverage comprises S1 annual spending, S2 quarterly visits, S3 quarterly spending, S4 monthly spending, S5 monthly visits and S6 annual visits; every series ends on 31 December 2023, with its current record released on 17 May 2024 and marked stale. Their current record references are respectively R298, R194, R330, R426, R290 and R162. CAA coverage comprises S7 annual UK airport passengers only, ending in 2025, with current record R152 released on 13 February 2026. No airport monthly, route-frequency or seat-capacity series appears in this inventory. VisitBritain UK sentiment, ABTA UK travel research and Google Trends UK search interest each have status unavailable, no stored series, and the stated reason: no valid, unambiguous UK series stored for this source. These are storage-coverage findings, not assertions that corresponding public statistics or research do not exist. The inventory cautions that CAA passengers include inbound, non-resident and connecting traffic; sentiment and intentions are not bookings; and differing units, frequencies and methodologies must not be combined. Record details for R152, R153, R194, R190, R330 and R326 were separately retrieved, and each reported stored-data percentage change was rechecked with industry_calculator.
- Stored ONS outbound visits and spending series end in 2023 and are stale; no September 2026 resident-demand growth rate is supplied from this inventory. The quarterly observations used here were released on 17 May 2024. [I1]⁸⁹

- ONS methodological changes prevent straightforward comparisons through annual 2024, while overseas-spending quality concerns require additional caution.⁷
([ons.gov.uk])(<https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/improving>)
- Stored CAA coverage is annual and ends in 2025; no September 2026 UK-wide monthly total, route-frequency series or comparable seat-capacity series is stored. [I1] Public monthly airport statistics do exist, as demonstrated by the CAA June 2026 page.¹²
([caa.co.uk])(<https://www.caa.co.uk/data-and-analysis/uk-aviation-market/airports/uk-airport-data/uk-airport-data-2026/june-2026/>)
- No valid, unambiguous UK VisitBritain sentiment, ABTA research or Google Trends series is stored. This is an inventory limitation, not a finding that public evidence from those sources is unavailable; no travel-intentions or search-growth estimate is substituted. [I1]
- Heathrow and Stansted provide airport-specific September observations, not comprehensive UK coverage or resident-travel estimates.¹²[I1]
([mediacentre.heathrow.com])(https://mediacentre.heathrow.com/pressrelease/detail/26355?utm_source=)
- The confidence survey's fieldwork ends on 14 September and does not measure holiday bookings.⁶ ([nielseniq.com])(<https://nielseniq.com/global/en/news-center/2026/consumer-confidence-up-one-point-in-september-to-13/>)
- The CAA June page gives a data-completion date, not a verified initial publication date; June observations are not September traffic.¹² ([caa.co.uk])(<https://www.caa.co.uk/data-and-analysis/uk-aviation-market/airports/uk-airport-data/uk-airport-data-2026/june-2026/>)
- The Prestwick cancellation count is an intra-day snapshot; no final incident total or monthly resident-travel effect is established here.¹⁴ ([apnews.com])(<https://apnews.com/article/britain-air-traffic-control-scotland-disruption-8c93444a3e4ec6f17bdf8596925302b3>)
- A separate, publicly accessible TravelSpy evidence-inventory URL could not be verified. Reference [I1] is therefore supplied as a dated, reader-accessible note within this complete report, not represented as an existing external web publication. A standalone linked inventory remains a publication requirement if an independently accessible source page is required.
- Google's methodology page does not display a publication date; its external_sources date is therefore null rather than an invented date.¹³
([support.google.com])(<https://support.google.com/trends/answer/4365533?hl=en>)

Methodology

Figures come from official UK statistics stored by TravelSpy with their release dates, licences and attribution. Each report is drafted by an AI research analyst, automatically checked figure-by-figure against the stored records, and

then independently fact-checked by a separate AI reviewer before publication. Sources keep their own periods and units and are never blended. Sentiment and search interest are not bookings, and airport passengers include inbound and connecting traffic.

- **UK travel research:** not included (No valid, unambiguous UK series stored for this source.)
- **UK resident outbound travel:** included
- **UK search interest:** not included (No valid, unambiguous UK series stored for this source.)
- **UK airport passenger context:** included
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Source: Office for National Statistics; cite publication URL, release, revision and methodology. Values converted to canonical units; not bookings.

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Source: Office for National Statistics; cite publication URL, release, revision and methodology. Values converted to canonical units; not bookings.

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