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September 2026: Airport growth diverges as resident demand remains harder to measure

UK travel industry report · September 2026 · Perspective: Airports and air connectivity · Published 15 October 2026

September airport results were mixed: MAG reported growth while Heathrow recorded lower passenger traffic, arguing against a single UK-wide demand narrative. With research cut off on 15 October 2026, this report separates current airport activity and survey intentions from the stale resident outbound statistics in TravelSpy’s frozen evidence pack.

Headlines

- MAG’s September passengers rose 4.0%; Heathrow’s terminal passengers fell 2.3%, according to their respective releases.[1][2]
- UK airports handled 299,351,416 passengers in 2025, up 2.35% on 2024—not a measure of resident outbound demand.[3][4][5]
- September’s overseas overnight-trip intention stood at 61.5% among GB adults aged 16+, not a booking rate.[6][5]
- ONS’s September tourism update corrected historical estimates and warned against comparisons across survey designs.[7]
- Stansted’s terminal-extension enabling works progressed; this was not additional passenger capacity already delivered.[8]

Key figures

299.4m passengers[3]

UK airport passengers

2025 · Released on 13 February 2026, this annual traffic total includes inbound and connecting passengers and is not September 2026 resident demand. [R152][M1]

61.5%[6]

Overseas overnight-trip intention

2026-09 · Released on 22 September 2026, this weighted survey measures GB adults aged 16+ intending an overseas overnight trip in the next 12 months, not bookings. [R1686][M1]

62%[9]

UK adults reporting an overseas holiday

2026 · Released on 13 October 2026, this annual survey wave describes holidays in respondents' previous 12 months, not a full-calendar-year or September-specific outcome. [R1682][M1]

86.2m visits[10]

UK resident outbound visits — historical

2023 · Released on 17 May 2024, this is stale historical context from the stored series and cannot establish September 2026 travel volumes. [R162][M1]

£72.4bn[11]

UK resident outbound spending — historical

2023 · Released on 17 May 2024, this annual spending estimate is historical context rather than a measure of current sales or September 2026 expenditure. [R298][M1]

UK outbound travel market

September's resident outbound market cannot be quantified from the stored official series. TravelSpy's frozen evidence pack ends in 2023 for ONS outbound visits and expenditure: 86,205,000 visits and £72,437,000,000 of spending that year, both released on 17 May 2024. These figures establish historical scale, not September 2026 performance; their staleness is a limitation of this pack, not a claim that ONS has published nothing newer.[10][11][15]

Indeed, ONS published corrected 2024 estimates on 4 September 2026, addressing destination-airport processing and package-holiday currency conversion. It warned that different survey designs across the two halves of 2024 create comparability problems. The estimates remain official statistics in development; this September publication concerns historical travel, not activity during the reporting month.[7]

Resident-based industry research offers a separate perspective. ABTA's annual wave, released on 13 October 2026, recorded 62% of UK adults reporting an overseas holiday in their previous 12 months.[9] Its nationally representative survey covered 2,082 UK adults and ran from 21 July to 6 August 2026. It therefore predates September and cannot establish the month's participation or expenditure. Commercial planning should retain this distinction rather than use airport growth to fill the resident-demand gap.[12]

Airports and air travel

The stored CAA annual series records 299,351,416 UK airport passengers in 2025, released on 13 February 2026, up 2.35% against 2024. This provides national historical context, but the pack contains no September 2026 CAA monthly total. Airport passengers include non-residents and connecting traffic, so this measure must not be relabelled UK resident outbound demand.[3][4][5]

For September itself, MAG's release of 12 October 2026 reported 6,507,718 passengers, up 4.0% year-on-year. Manchester handled 3,144,812, up 1.4%; London Stansted 2,879,696, up 6.4%; and East Midlands 483,210, up 7.8%. These are operator-reported changes, showing different growth rates even within the same group.[1]

Heathrow's release on the same date reported September terminal passengers of 7,180 in its stated unit of thousands, down 2.3%, and 38,820 air transport movements, down 3.4%. Its Middle East passenger traffic fell 20.1%, while Asia / Pacific increased 3.3%. These contrasting results support airport- and region-specific assessment, not extrapolation to the whole UK market. Neither release supplies a resident-only demand measure.[2]

Consumer sentiment and search

VisitBritain / VisitEngland's September survey wave, released on 22 September 2026, recorded 61.5% intending an overseas overnight trip in the next 12 months and 78.34% intending a UK overnight trip. Both are weighted measures covering GB adults aged 16+, not the entire UK population. They describe stated intentions over a forward-looking window, rather than September departures, confirmed reservations or spending.[6][13][5]

These measures should be kept separate from ABTA's retrospective holiday participation finding. The surveys differ in population, question, observation window and methodology; combining their percentages or treating them as stages in a single booking funnel would be misleading. The stored September intention series also lacks an unambiguous matching prior-year observation, so no year-on-year comparison is presented.[9][6][13][5]

Search evidence is unavailable: the frozen pack contains no valid, unambiguous UK Google Trends series. There is consequently no supported September search ranking or search-growth claim here. Google Trends is a normalised index, not traveller counts or bookings, and no year-on-year inference is made. For commercial teams, the implication is to treat intentions as a planning signal requiring separate evidence of conversion, not as committed demand.[5]

Airports and air connectivity

Airport throughput measures activity, not unique holidaymakers. CAA defines terminal passengers as people joining or leaving aircraft at the reporting airport, including interlining passengers. Someone travelling between reporting airports is counted at both. The analytical implication is that airport totals cannot be converted into resident holidays without separate evidence on residence, purpose and journeys.[14] ([caa.co.uk](https://www.caa.co.uk/Documents/Download/26836/b61a64e5-6594-4741-9e56-8dd672c053dd/17857))

Capacity is a different question again. CAA defines aircraft movements as take-offs or landings, and air transport movements cover commercial passenger, cargo or mail operations. Consequently, neither movements nor passenger throughput alone establishes available passenger seats.[14] ([caa.co.uk](https://www.caa.co.uk/Documents/Download/26836/b61a64e5-6594-4741-9e56-8dd672c053dd/17857)) Our recommended capacity assessment would pair traffic with route schedules, aircraft configuration and operated frequencies; a connectivity assessment would additionally examine destinations, timings and viable connections. TravelSpy's inspected frozen evidence pack contains no matched September dataset covering route schedules, seat capacity, aircraft configuration and viable connections; connectivity implications here are qualitative.[5] This report therefore makes no quantified claim about seat-capacity growth.

Hub traffic illustrates why the distinction matters. Heathrow reported almost 1.4 million transfer passengers in September and more than 40 airlines seeking slots in its 12 October 2026 release. Transfer flows can support connections without representing UK residents starting holidays; airline interest is not delivered capacity. The commercial implication is to distinguish routes already operating from prospective access before committing destination or distribution budgets.[2]

Stansted's 12 October 2026 release identified Palma de Mallorca, Alicante, Faro and Malaga as leading September sunshine destinations. It also reported removal of the airside bussing facility and link bridge, enabling terminal-extension foundation works. This gives useful destination context and a concrete construction milestone, but not evidence that the extension's passenger

capacity was already available. For operators and destinations, the appropriate response is to evaluate confirmed services and opening milestones separately from infrastructure ambitions.[8]

Finally, resident demand needs its own evidence stream. ABTA's participation survey and VisitBritain's intention survey answer different questions from airport traffic. A practical management dashboard should therefore keep resident participation, intentions, airport throughput and confirmed connectivity in separate panels, with observation and release dates visible. This is an analytical recommendation, not a composite market index or forecast.[965]

Outlook and implications for travel businesses

The evidence supports conditional planning rather than a single growth forecast. If airport performance continues to diverge, tour operators and OTAs should assess departure-airport and destination combinations individually before extending allocations or promotional commitments. September's contrasting operator results justify that segmentation, but do not establish how winter traffic will develop.[12]

If stated overseas intentions translate into purchases, there may be opportunities to convert interest into departures. However, the September survey does not establish timing, budget or conversion. Advisors and commercial teams should therefore test propositions against confirmed availability rather than interpret the intention percentage as a sales forecast. No search-based corroboration is available in this evidence pack.[65]

If infrastructure projects progress into operational openings, businesses can reassess the services they enable. Until then, Stansted's construction milestone should inform monitoring rather than assumptions about immediately available capacity.[8]

The next evidence priority is a refreshed resident-travel baseline with compatible methodology, followed by matched airport, route and seat data. ONS's September guidance explicitly restricts comparisons between old and new survey designs. Any refreshed commercial benchmark should preserve that break rather than splice incompatible observations into an apparently continuous demand trend.[7]

Data gaps and limitations

- Stored ONS outbound visits and spending end in 2023 and were released on 17 May 2024; they cannot quantify September 2026 resident demand, despite newer historical publications being available outside the pack.[101157]

- The frozen CAA series is annual through 2025, released on 13 February 2026; it contains no September 2026 national monthly passenger total.[35]
- MAG and Heathrow releases provide selected-airport September context, not a complete UK-wide or resident-only market measure.[125]
- TravelSpy's inspected frozen evidence pack contains no matched September dataset covering route schedules, seat capacity, aircraft configuration and viable connections; connectivity implications here are qualitative.[5]
- No valid, unambiguous UK Google Trends series is stored; no search-volume, ranking or year-on-year claim is made.[5]
- The stored September intention series has no unambiguous matching prior-year observation; intentions are not bookings.[6135]
- ABTA's 2026 wave was fielded before September and published on 13 October; its annual period label is not a completed calendar-year observation.[912]
- ONS warns against direct comparisons across old and new IPS designs, limiting how historical and refreshed benchmarks can be joined.[7]

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**: included
- **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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