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October 2026 UK Industry Report: winter departures meet next summer’s booking calendar

UK Industry Report · October 2026 · Perspective: Seasonality and the booking calendar · Published 10 November 2026

October’s commercial calendar spanned immediate winter departures and advance sales, with Jet2 launching its Black Friday promotion on 29 October across multiple travel seasons. (jet2plc.com) Survey evidence supports differentiated family and shoulder-season planning, but intentions do not establish achieved bookings. (abta.com) Prepared with a 10 November 2026 research cut-off, this report separates historical travel volumes, survey signals and announced programmes.

Headlines

- October’s ONS release estimated 99.9 million UK-resident visits abroad in 2025—not October 2026 trading.[1] (ons.gov.uk)
- ABTA’s 2026 survey found 70% intended an overseas holiday in the next 12 months; intentions are not bookings.[2]
- May and September featured prominently in overseas holiday intentions for 2027, while August remained families’ favourite.[3] (abta.com)
- Jet2’s Black Friday sale began on 29 October, bringing winter and advance-summer selling into the same promotional window.[4] (jet2plc.com)
- October CAA airport statistics were scheduled for 16 December 2026, beyond this report’s cut-off.[5] (caa.co.uk)

Key figures

299.4m passengers; +2.35% year on year[6]

UK airport passengers: annual context

2025 · Released on 13 February 2026, this annual airport total includes inbound and transfer traffic and is not UK-resident outbound demand.[6][7]

70% intend an overseas holiday in the next 12 months[2]

Overseas holiday intention

2026 · ABTA’s representative UK-adult survey wave, released on 13 October 2026, measures intentions for the next 12 months rather than bookings or a completed calendar-year outcome.[2]

61.5% intend an overseas overnight trip in the next 12 months[8]

Overseas overnight-trip intention

2026-09 · 61.5% of GB adults aged 16+ intended to take an overseas overnight trip in the next 12 months, according to the weighted September 2026 observation, released on 22 September 2026—a survey intention, not bookings, and a differently defined measure from ABTA’s.[8][2]

8.494m visits in October 2023[9]

Historical October outbound visits

2023-10 · Released on 17 May 2024, this stale ONS monthly observation illustrates historical seasonality across all travel purposes, not October 2026 demand.[9]

UK outbound travel market

October brought a newer official historical baseline, not a contemporaneous measure of trading. ONS published Travel trends: 2025 on 16 October 2026, estimating 99.9 million UK-resident visits abroad and £86.2 billion of spending during 2025. These are provisional official statistics in development. ONS cautions that annual comparisons with 2024 require care because that year combines survey methodologies. The UK annual totals must also remain distinct from the publication's GB-resident quarterly comparisons.[1] (ons.gov.uk)

The frozen TravelSpy evidence pack has a separate limitation: its stored ONS series end in 2023. For example, October 2023 recorded 8.494 million visits abroad, released on 17 May 2024. That observation is useful for historical seasonal analysis, but cannot describe October 2026 performance. The newer ONS release above is independently checked external context, not an update to the stored series.[9][10]

For commercial planning, the distinction is essential. Use the newer annual release to frame market scale and the older monthly observations only as an illustrative seasonal profile. Neither supplies this October's booking pace, cancellations or profitability by departure month. This report therefore makes no claim about industry-wide October booking growth and does not splice the historical monthly series into a current demand estimate.[1][10] (ons.gov.uk)

Airports and air travel

The stored CAA annual baseline records 299,351,416 UK airport passengers in 2025, released on 13 February 2026, against 292,488,416 in 2024, released on 13 February 2025. The like-for-like calculator comparison is growth of 2.35%. These are airport-wide passenger totals, including inbound and transfer traffic; they must not be described as UK residents taking overseas holidays. The stored series is annual and provides no October 2026 observation.[6][7][10]

Official monthly reporting also lags the operating month. The CAA calendar lists the 16 October airport and punctuality releases as covering August 2026. October airport and punctuality statistics were scheduled for 16 December, with October airline statistics scheduled for 23 December. Those dates remained in the future at this report's 10 November cut-off.[5] (caa.co.uk)

Meanwhile, programme announcements show why sales activity should not be confused with current flying. On 2 October, Bournemouth Airport announced almost 5,000 Jet2 Christmas-market seats to Prague and Vienna for winter 2027/28, alongside existing sales for winter 2026/27 and summer 2027. This is announced inventory, not passengers carried or seats sold. The planning implication is to match accommodation commitments and campaign dates to the

specific operating programme, rather than extrapolating from an annual airport total.[11] (bournemouthairport.com)

Consumer sentiment and search

ABTA’s stored 2026 survey wave, released on 13 October 2026, found that 70% of representative UK-adult respondents intended an overseas holiday in the next 12 months, while 62% reported having taken one in the preceding 12 months. The annual period label identifies the survey wave; it does not mean a completed January–December outcome. These retrospective and prospective measures should not be interpreted as a conversion funnel.[2][12]

61.5% of GB adults aged 16+ intended to take an overseas overnight trip in the next 12 months, according to the weighted September 2026 observation, released on 22 September 2026.[8] This VisitBritain measure records intentions, not bookings; September identifies the observation, not the intended travel window. Its population, trip definition and timing differ from ABTA’s overseas-holiday measure, so the percentages are not interchangeable. The frozen pack contains no October VisitBritain observation or unambiguous prior-year comparator for its latest observation.[8][10]

Broader affordability sentiment weakened. The GfK Consumer Confidence Barometer powered by NIM, published on 23 October, reported an 11-point fall to -24; its Major Purchase Index fell 14 points to -22. Interviews took place from 1 to 14 October 2026. These are confidence-index movements, not percentage changes in holiday demand. A reasonable commercial response is to test clear total-price and value messaging, rather than assume intentions will convert unchanged.[13] (nielseniq.com)

No valid, unambiguous UK Google Trends series is stored in this evidence pack, so no search ranking or search-growth claim is made. Google Trends would in any case represent normalised interest, not traveller numbers or bookings; no search year-on-year comparison is presented.[10]

Seasonality and the booking calendar

Separate the travel calendar from the sales calendar. The historical ONS monthly profile illustrates a substantial autumn transition: UK-resident visits abroad numbered 10.223 million in August 2023, 9.477 million in September, 8.494 million in October, 5.711 million in November and 4.998 million in December. The calculated October-to-November decline was 32.76%. All were released on 17 May 2024, cover all travel purposes and are stale—not a forecast of the same decline in 2026. The implication is to assess autumn departures against an appropriate seasonal baseline, not automatically interpret a lower November volume as lost competitiveness.[14][15][16][17]

Family travel needs a local calendar rather than a single national assumption. Croydon Council's accessible school-calendar webpage lists October half-term as 26–30 October 2026 and February half-term as 15–19 February 2027. These are a London-area example, not UK-wide dates; the council advises checking individual schools. The Christmas range is omitted pending confirmation: the linked council PDF could not be inspected because retrieval repeatedly timed out, while the webpage's Christmas endpoint is inconsistent. Operators should verify relevant schools and catchments before allocating family rooms, seats and advertising. For the next departure windows, check that flight dates, accommodation and transfers form a bookable product before promoting availability.[18] (croydon.gov.uk)

Flexible-date demand warrants a different approach. ABTA's 13 October release found 17% planning an overseas holiday in May 2027 and 15% in September; August remained families' favourite, at around 20%. The representative survey covered 2,082 UK adults between 21 July and 6 August 2026, and ABTA warned that later months were less firmly planned. These intentions support testing separate family and shoulder-season campaigns, not reallocating guaranteed inventory in direct proportion to survey percentages. Retain flexibility where interest has not yet become committed demand.[3] (abta.com)

October also demonstrated overlapping selling seasons. Bournemouth's winter 2027/28 Christmas-market launch was already on sale while winter 2026/27 and summer 2027 remained available. The analytical implication is to record booking month and departure season separately: an October sale for the following winter should not be treated as evidence that immediate winter departures are filling. Inventory reviews should distinguish near-departure exposure from advance commitments and identify the release or payment deadlines attached to each.[11] (bournemouthairport.com)

Promotional timing adds another layer. Jet2 launched its Black Friday sale on 29 October, advertising £100pp off all holidays and up to 20% off all flights, with messaging spanning winter sunshine and the following summer's family holidays. These were advertised offers, not achieved booking growth. Operators should therefore separate near-departure conversion campaigns from advance-season acquisition, with distinct availability checks and contribution targets. Assess whether a promotion brings forward a future booking or fills otherwise exposed inventory before expanding discounts across the programme.[4] (jet2plc.com)

Outlook and implications for travel businesses

The evidence supports conditional planning rather than a numerical demand forecast. If overseas holiday intentions translate into purchases, flexible-date products could benefit from the interest

ABTA identified in May and September. If weaker consumer confidence delays commitment, the alternative response is to retain adjustable allocations and test value propositions before extending fixed commitments. Neither scenario is an observed booking outcome.[2][3][13] (abta.com)

Sterling provides a separate affordability consideration. Reuters reported on 13 October 2026 a rate of $1.334 per pound and 84.48 pence per euro. These are contemporaneous market quotations, not October averages or retail travel-money rates. For planning, stress-test destination costs under alternative exchange-rate assumptions and avoid promising package savings from a spot quotation alone. This is a sensitivity exercise, not a currency forecast.[19] (aol.com)

Operationally, use UK FCDO country advice for entry requirements, safety and security information, with country-specific email updates available. A practical control is to recheck advice when selecting programmes and before departure communications, rather than assume conditions remain unchanged throughout a long booking horizon.[20] (gov.uk)

The immediate management priorities are to separate departure windows, distinguish firm from releasable inventory and evaluate promotions by travel season. Revisit the aviation assessment when the scheduled October CAA releases arrive in December; until then, this report has no complete official October traffic outturn and no verified industry-wide October booking total. The missing UK search series also limits cross-checking of early interest.[5][10] (caa.co.uk)

Data gaps and limitations

- The frozen TravelSpy ONS series end in 2023 and are stale; the independently checked 2025 ONS release is external context, not newly stored data.[10][17][1] (ons.gov.uk)
- The stored CAA series is annual, with no October 2026 observation; October airport and punctuality statistics were scheduled for 16 December 2026 and airline statistics for 23 December, after the research cut-off.[10][5] (caa.co.uk)
- The latest stored VisitBritain observation is September 2026, released on 22 September, and measures intended travel in the next 12 months; no October observation or unambiguous matching prior-year comparator is available in this pack.[8][10]
- No valid, unambiguous UK Google Trends series is stored; no search-volume, ranking or year-on-year claim is made.[10]
- The stored ABTA survey series have no unambiguous matching prior-year baseline; annual wave labels are not completed calendar-year outcomes, and intentions are not bookings.[12][2][10]

- This evidence does not establish industry-wide October 2026 booking growth, conversion or profitability; announced inventory and advertised promotions cannot fill that gap.[10][11] (jet2plc.com)
- Croydon's linked 2026/27 council PDF repeatedly timed out and could not be inspected or retained as a verified copy. The accessible council webpage corroborates both half-term ranges but contains an inconsistent Christmas endpoint, so the Christmas range has been removed pending confirmation and W3 now cites the accessible webpage.[1][8] (croydon.gov.uk)

Methodology

Figures come from market-specific statistics stored by TravelSpy with source timing and attribution, or cited published research. Each report is drafted by an AI research analyst, automatically checked figure-by-figure against the stored records, and independently fact-checked by a separate AI reviewer before publication. Sources keep their own periods, populations and units and are never blended. Sentiment, search interest and price indices are not bookings; airport passengers include nonresidents and connections. First-observed dates are not provider publication dates.

- **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
- **UK travel sentiment**: included

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