Flying in 2025 and beyond

Research findings from Wave 14 of the CAA's UK Aviation Consumer Survey

UK Civil Aviation Authority

Report by Savanta

Executive Summary (slide 1 of 4)

Section 1: Flying in 2025

Flight behaviour and frequency

- Consumers continue to fly in the highest numbers since this survey began in 2016. With 62% having flown in the last 12 months, the flying rate has remained stable compared to last year, reflecting ongoing post-pandemic recovery.
- Recent flyers continue to skew significantly younger than before the pandemic, with younger people also remaining much more likely to fly frequently. Although the gap between younger and older consumers has narrowed slightly since 2024, this only points to a marginal increase.
- Looking ahead, more consumers plan to increase their flying in 2026 than to reduce it, with growth led primarily by younger age groups. In contrast, older consumers generally expect their flying habits to remain unchanged.
- Affordability remains the most frequently cited barrier to flying , with 36% of non-flyers referencing financial limitations as the main reason for not flying in the last 12 months.

Overall satisfaction

- Overall satisfaction with the air travel experience is at an all time high with 88% saying they are satisfied with their experience. Satisfaction continued to rise in 2025, building on improvements reported last year and reaching the highest levels since tracking began in 2016.
- While satisfaction levels are high across all groups overall, satisfaction is slightly lower for certain vulnerable passenger groups* - such as those with accessibility or disability needs (82%), those facing digital barriers (80%), and those with financial constraints (80%).

**Consumer vulnerability can arise from various factors. In our report, we focus on digital access, language or communicationbarriers, personal circumstances, accessibility/disability needs, and financial challenges as key types of vulnerability. For more information on each group, please refer to slide 9.*

Executive Summary (slide 2 of 4)

The experience of vulnerable passengers and those with accessibility needs and disabilities

Despite high satisfaction with the travel experience, even among vulnerable groups, consumers with specific vulnerabilities and disabilities face different challenges when flying:

- Nearly six in ten (58%) of disabled consumers report difficulty accessing or using airports and flying, with the most common needs being help with walking, standing, or managing luggage. These persistent challenges contribute to a lower flying frequency compared to consumers who do not report having a disability.
- Complaint handling is the area with the largest disparity—only 66% of disabled passengers are satisfied, compared with 74% of non-disabled passengers.
- The need for support continues to act as a barrier to air travel participation, with those who have not flown in the last 12 months most likely to require help at the airport or during their flight:
    - Passengers with non-visible and physical disabilities are consistently the most likely to require some form of assistance.
    - 80% of digitally vulnerable passengers anticipate requiring support with technology, such as check-in kiosks.
    - 70% of those facing language or communication challenges are likely to need help understanding instructions or airport procedures.

Executive Summary (slide 3 of 4)

Section 2: The experience of consumers and passengers

Consumer priorities, value for money and hidden charges

- The cost of flying remains the most widespread priority for consumers, with 52% rating it as their top concern. Over half of passengers also reported making use of lower cost options such as choosing a less convenient flight time or travelling with hand luggage only.
- While most passengers believe they understand what's included in their airfare, awareness for different products or services at the point of booking is uneven and reflects the varied ways airlines present and charge for extras. Notably, about a quarter of passengers remain unaware of specific additional fees, such as booking fees (27%) or charges for printing boarding passes at the airport (24%).
- Despite this inconsistency and the potential for unexpected costs, overall satisfaction with value for money is high (76%) and has returned to levels last seen before 2022, following a period after the pandemic when value for money ratings were lower.

Travel disruption and complaint handling

- Experience of travel disruption has declined slightly this year from 58% of passengers in 2024 reporting experiencing a travel problem to 55% in 2025. However, 54% of passengers report not being informed of their rights by the airport or airline when they experienced a travel problem.
- Moreover, passengers show inconsistent understanding of entitlement terms related to air travel and disruption, highlighting uncertainty around the distinctions and correct application of "refund," "compensation," and "reimbursement."

Executive Summary (slide 4 of 4)

Travel disruption and complaint handling (continued)

- Support, guidance, and notifications continue to be inconsistent in the event of travel disruptions. Most passengers reported delay notifications as being delivered via passive channels such as airport screens (35%), while cancellations are usually communicated by email (45%). Although alternative flights are often offered, many passengers say they did not receive clear details about how to access further support when they experienced a delay (43%).
- Despite ongoing communication challenges, satisfaction with complaint handling has improved markedly (+10pp to 72% in 2025) – even as the number of complaints remained steady compared to last year. Passengers cited notable progress in the ease of reaching support, faster response times, and a smoother complaint process, leading to more positive outcomes overall. However, while satisfaction with complaint handling is on an upward trend, it continues to be an area with lower satisfaction relative to others such as the process of booking the flight.
- As seen in previous waves, older passengers are disproportionately affected by information gaps during travel disruption. They are less likely to report they were informed of their rights (11%) or refund options (17%) when they experienced a travel issue. This same group of passengers also report lower confidence in escalating complaints (23% vs 36% among 18-24 years old).

An introduction to the Aviation Consumer Survey

This annual research – now into its fourteenth instalment – aims to provide an in-depth understanding of UK consumers' flying behaviours and their attitudes towards travelling by air over time. It surveys a robust, nationally representative sample of 3,500 UK adults on a variety of aviation-related topics, building a picture of ***how and why consumer experiences of aviation are changing over time.***

Previous instalments set out how the aviation consumer landscape has fundamentally changed following the COVID-19 pandemic. Although flying rates in 2025 have remained consistent with 2024 levels, research from this wave (and previous waves) reveals that the profile of flyers has become markedly younger between 2019 and 2024. Notably, while outcomes have improved for all passengers since the pandemic, the pace of improvement has been slower for older and disabled consumers compared to other flyers.

More specifically, this instalment aims to better understand the broader concept of consumer vulnerability and how it can manifest in an aviation context. Also examined is the **impact of travel disruption on passengers,** as well as **passengers' attitudes towards communication during disruption**.

Understanding the passenger journey should be a priority for policymakers and industry leaders. This report aims to equip decision-makers with insights to consider what more can be done to foster an aviation experience that aligns more closely with consumer priorities and expectations from various groups, such as those in vulnerable circumstances and other demographics.

This research is also designed to provide valuable insights for stakeholders beyond the policymaking sphere. Historically, this report's audience has included airports, airlines, public bodies, and the general public. Our goal is to deliver a rich understanding of consumer behaviours and attitudes, which readers can apply to their specific contexts.

Note: Flying rate(s) refers to the proportion of the UK population who have flown in the last year.

Contents

How to read this report

- Survey results are based on self-reported behaviour and attitudes, and may be subject to recall bias or social desirability bias. Caveats are noted where appropriate.
- Where relevant, differences between subgroups and additional demographic insights are included.
- When a chart or table includes these signs ↑↓, it notes that a result is "significantly higher/lower at 95% confidence". This indicates that the year-on-year differences, or differences between sub-groups, are statistically robust.
- Results from questions or subgroups with a base size below 50 are excluded from quantitative analysis to maintain statistical robustness. Any reference to figures with a low base size of less than 100 are asterisked for clarity (*) and should be treated as indicative of this group only.
- Throughout this report the key subgroups of interest are:
  - **Consumers** are defined as individuals who are demographically representative of the UK by gender, age, region, and working status. Both those who have flown in the last 12 months and those who have not (or have never flown) are included within the definition of consumers.
  - **Vulnerable consumers** are defined as those who may become vulnerable due to individual characteristics, personal circumstances, environment, or business practices that make them especially susceptible to harm (see slide 9 for details).
  - **Passengers** are defined as consumers who have flown in the last 12 months.
  - **Flying rate** is used to refer to the proportion of the UK population who have flown in the last year.

For further detail on methodology, please refer to the Methodology slide at the end of the report.

Consumer Vulnerability

A new area of focus for this wave is the broader concept of consumer vulnerability and how it can manifest in an aviation context. Consumers can become vulnerable from their individual characteristics, personal circumstances, the specific environment, or a particular business practices that make them especially susceptible to harm. This can include disabled consumers who may require assistance, but vulnerability can also be considered through a number of other lenses. It's worth noting that these groups aren't mutually exclusive.

The key groups in focus this year include:

Digital vulnerability (8% of sample)
Those who are not digitally confident/would need assistance using technology

Language/ communication vulnerability (4% of sample)
Those who need communication support (including translation) and help understanding airport instructions and procedures

Personal circumstances (22% of sample)
Those travelling with small children, elderly companions, while pregnant or those who would have difficulty obtaining travel documents

Accessibility and disability* (21% of sample)
Those with physical/non-physical, visible/non-visible disabilities and/or have difficulties managing on a flight/at the airport, and may require assistance

Financial vulnerability (29% of sample)
Those who have difficulty flying due to budgetary reasons or would struggle to pay an unexpected bill

*Please note previous waves make references to PRM/disabled consumers or passengers (or persons), this is now being included under the 'accessibility and disability' group

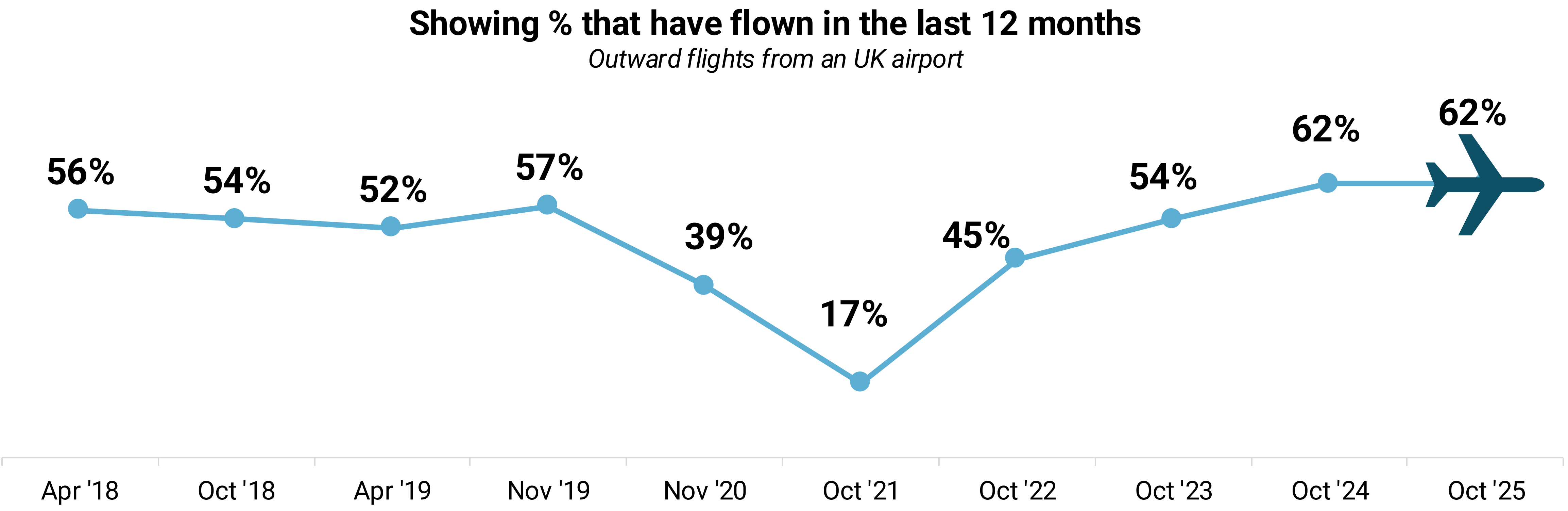
Section 1.1:

Flying behaviour and flight frequency

Key takeaways from this section:

- The proportion of UK consumers flying during the year remains steady in 2025, matching 2024's record levels — the highest observed since this survey began in 2016.
- However, persistent gaps by age and disability suggest that patterns of air travel continue to vary among different demographic groups.
- Overall flight intentions for 2026 remain steady, mirroring last year's trends. More consumers are expecting to increase their flight activity next year than reduce it, particularly younger consumers.
- Budgetary constraints remain – by some distance – the most frequent reason given for *not* having flown in the last 12 months highlighting that affordability barriers remain.

Consumer flying rates remain steady in 2025, with the proportion of flyers unchanged from 2024. As observed last year, younger consumers continue to take more trips



While overall participation in air travel is strong, a deeper look reveals subtle shifts in behaviour. The average number of trips taken has increased slightly from 3.2 to 3.4. Half of consumers have taken 1 or 2 trips in the last year (22% 1 trip, 28% 2 trips), the other half (50%) have taken 3 or more trips in 2025. Younger consumers are significantly more likely to take multiple trips in a year than their older counterparts, with 16% taking over 5 trips within the year compared to 12% of those aged 55+. Despite stable overall flying rates, key differences remain across age and disability groups with findings on the next slide highlighting how these gaps have continued.

Note: Flying rate(s) refers to the proportion of the UK population who have flown in the last year.

Q1. When was the last time you flew from a UK airport? Base: All respondents, Oct-25 (n=3500); Q2. How many trips by air have you made in the last 12 months? Base: All who have flown in the last 12 months (n=2173)

A notable variance in flying rate remains in key demographics, with no change between disability status, however the gap has closed slightly between young and older passengers

Showing % who flew in the last 12 months by demographic group

Outward flights from an UK airport

	Overall	18-34	35-54	55+	Gap* between 18-34 and 55+	Disability	No disability	Gap between Disability and No disability
October 2024	62%	73%	63%	53%	**20pp**	41%	67%	**26pp**
					-4pp change in gap since 2024			**No change** in gap since 2024
October 2025	62%	72%	62%	56%	**16pp**	42%	68%	**26pp**

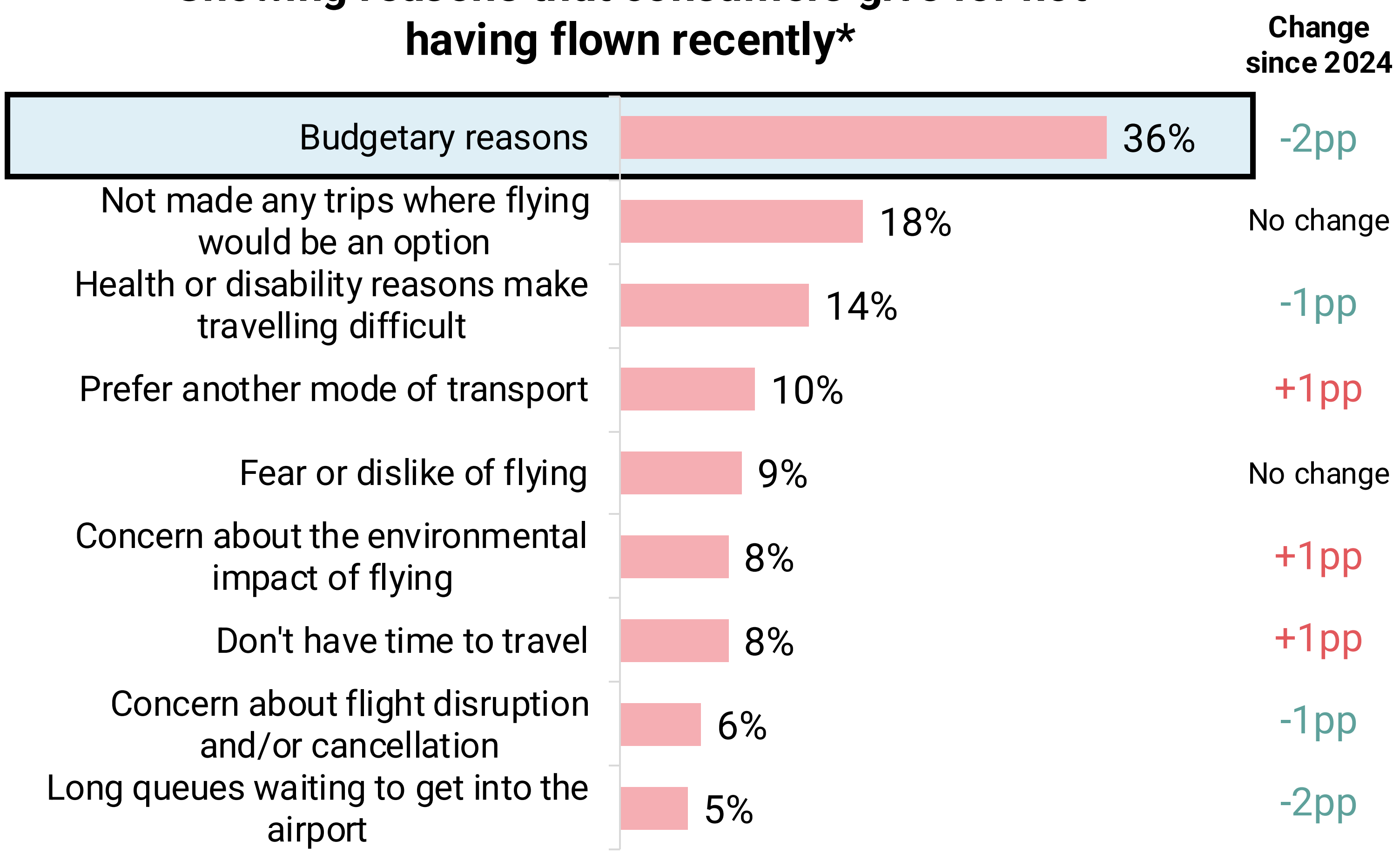
While overall flying rates have remained at high levels, the findings highlight ongoing disparities in air travel participation across both age and disability demographics. The gap in flying rates between younger (18–34) and older consumers (55+) has narrowed slightly, from 20 percentage points (pp) in 2024 to 16pp in 2025. However, this reduction is minor and not statistically significant. In contrast, the gap between disabled and non-disabled passengers remains unchanged at 26pp, mirroring last year's results.

Note: Flying rate(s) refers to the proportion of the UK population who have flown in the last year.

Q1. When was the last time you flew from a UK airport? Base: All respondents, Oct-25 (n=3500). *By 'gap', we mean the percentage difference between two specified groups. If the gap decreases year on year (shown as a negative percentage change), it indicates that the difference between those demographic groups is shrinking which in this instance is a positive sign.

Reasons for *not* flying remain similar to 2024, with affordability continuing to be the top cited barrier

Showing reasons that consumers give for not having flown recently*



Budgetary constraints are the most frequently cited barrier to flying across all age groups. However, these concerns are less pronounced among older consumers (29% of 55+) compared to younger consumers (41% of 18-34).

Health and transport preferences become more significant among older respondents. Those aged 55+ are substantially more likely to cite health or disability (19%) and a preference for other modes of transport (12%) as reasons for not flying.

For disabled consumers, budgetary reasons (35%) are their top cause for not flying in the last 12 months, followed very closely by health or disability reasons that make it difficult to manage at the airport or on the flight (33%).

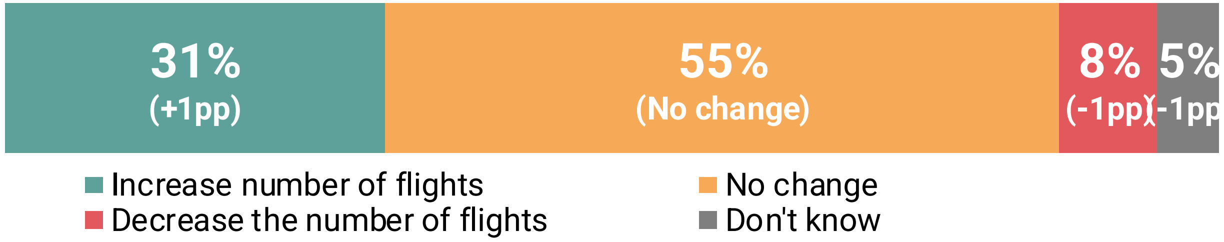
Q3. Why have you not flown in the last 12 months? Note: respondents could pick multiple barriers, so the sum of the percentages exceeds 100%. Base: All respondents who have not flown in the last 12 months (n=1309). *Showing the top 9 reasons for not flying.

Momentum for increased flying continues in 2026 and is especially strong among younger consumers

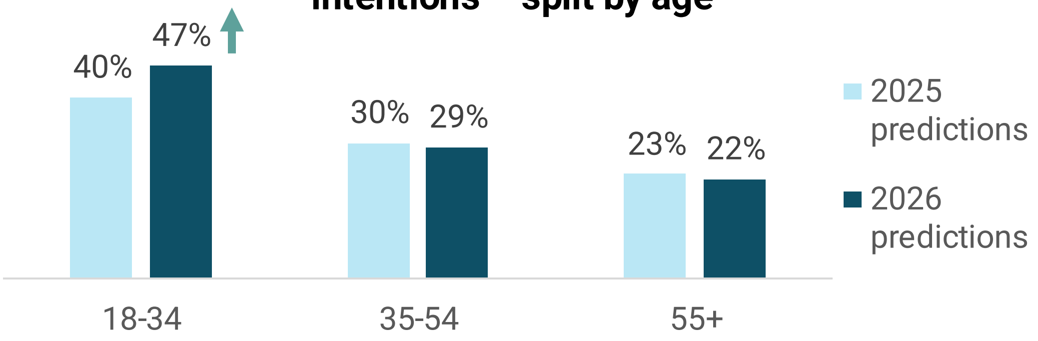
- Overall flight intentions for 2026 mirror the intentions reported last year. Most consumers (55%) expect their flying habits to stay the same, with nearly one in three (31%) planning to fly more. Increased flying intentions include 44% of consumers who haven't flown in the past year but who have flown in the last four years, highlighting demand even among infrequent flyers.

- Conversely, most who haven't flown in the past ten years or have never flown show little interest in changing their flying habits, with 67% and 70% respectively reporting no intention to fly more. But overall, there continues to be a higher proportion intending to fly more than fly less in the next year, reinforcing the pattern of stable and sustained demand seen in last year's ACS.

Flying intentions for the next 12 months



Showing those reporting an increase in flying intentions – split by age



- However, beneath this stability, younger consumers are driving momentum in the aviation sector. Nearly half (47%) of 18–34 year olds plan to take more flights in the next year compared to 40% last year, marking a notable jump. In contrast, intentions among older age groups have remained steady.

- This aligns with the finding that younger consumers are already significantly more likely to take multiple trips in a year than their older counterparts, and paired with this rising intent, are set to further increase their number of flights.

Q4. In the next 12 months, do you expect that you will fly more, the same amount or less compared to the number of times you have flown over the last 12 months?
Base: All respondents, October 2025 (n=3500).

Section 1.2:

Satisfaction with the overall experience of flying

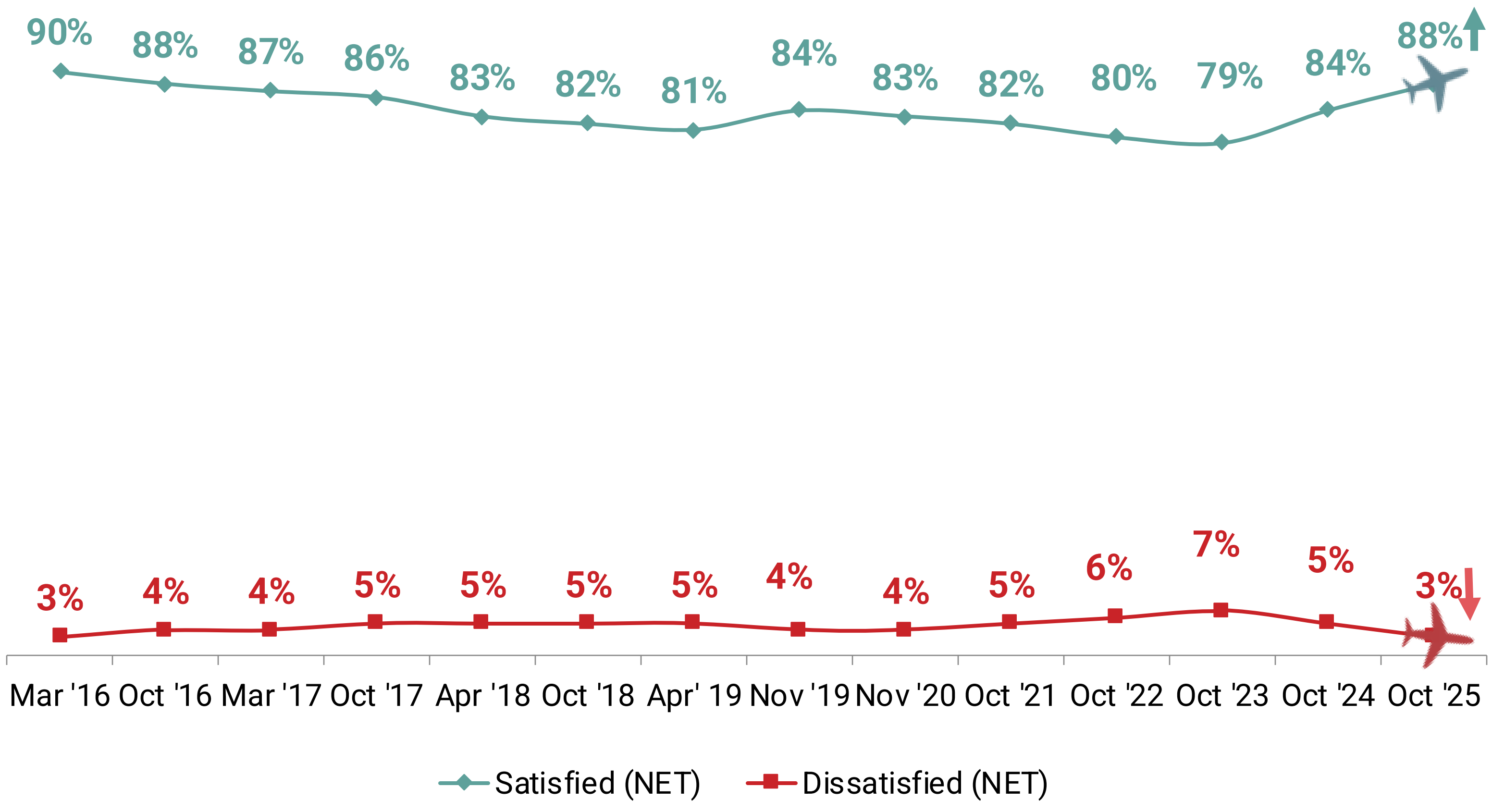
Key takeaways from this section:

- Satisfaction with the overall travel experience continues to rise since 2024, recording the highest score (88%) since 2016.
- This improvement is partly driven by a significant +10pp increase in satisfaction with complaint handling, which has historically been a clear pain point for passengers.
- However, passengers in certain vulnerable groups (digital, language/communication and personal circumstances) experience lower levels of satisfaction.
- Regionally, satisfaction scores have mostly increased or remained stable in 2025, sustaining the positive trend from 2024. Satisfaction rates are generally above 80% across all UK regions.
    - While the North-East and South-West saw slight declines – mainly related to passport control and transfer/connection issues – most regions have maintained or improved their scores.
    - Northern Ireland's significant increase last year has held steady; however, it continues to lag behind, remaining 8pp below the national average and further behind the best-performing regions.
    - In contrast, Wales, which saw a dip last year, has experienced a modest rebound in satisfaction.

Satisfaction with the overall travel experience has risen slightly, adding to the improvements seen in 2024. Satisfaction is now close to the levels seen when tracking began in 2016

Last flight: Overall satisfaction with the travel experience

All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



Satisfaction levels are now consistent across age groups (18-34: 87%, 35-54: 88%, 55+: 89%), a shift from prior years when notable gaps existed. This indicates a more universal experience regardless of age, indicating that the gap in travel frequency is likely impacted by other factors rather than overall satisfaction.

A standout driver of this improvement, as will be explored in section 1.3, is the notable rise in satisfaction with complaints handling, which has increased by 10pp this year. Previously, complaints handling was a clear pain point, often associated with lower overall satisfaction scores (62% in 2024). The latest results show passengers are now more positive about how their issues are managed (72%). While no single factor fully explains the increase in overall satisfaction, this change in complaints handling not only lifts overall satisfaction, but also indicates that improvements in how complaints are handled can directly boost passenger perceptions of the travel experience.

Q24.14. The overall travel experience: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 2164)

Passengers who remain dissatisfied cite flight disruption, overcrowding, accessibility issues, and high prices for some services as the main causes

Profile of those who are dissatisfied:
(Those significantly more dissatisfied than their counterparts ranked highest on dissatisfaction score)

- Experienced a flight cancellation or diversion (10% vs 1% of those that didn't experience a travel problem)
- Passengers who are not digitally confident (7% vs 3% of those who are)
- From Northern Ireland or the West Midlands (6% vs 3% from anywhere else)
- Passengers who have financial vulnerability characteristics, or accessibility or disability needs (6% vs 3% of those not vulnerable)

When asked about the reason for being dissatisfied with their overall travel experience, the following factors were the most referenced:

- **Flight delays (often several hours)** are the most cited source of frustration. Passengers report delayed notifications, last-minute cancellations, and lack of updates or clear communication during disruptions, resulting in stress, confusion, and inconvenience.
- **Overcrowding at airports and on aircraft** is consistently mentioned, with long queues for check-in, security, boarding, and baggage claim.
- Some passengers with disabilities, as well as some with mobility issues, reported that they found **airports and their processes inaccessible.** Main challenges included unclear information about available support during booking and boarding, a lack of assistance staff, and navigation difficulties.
- **High prices for food, drinks, parking, and airport drop-off/pick-up** are also an area of dissatisfaction, with several feeling that the experience doesn't match the cost.

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I am a wheelchair user but stood up before we boarded the plane to stretch my legs, and the airport assistance people whipped the wheelchair away as they needed it. I didn't know how I was going to get onto the plane, so my family went to find another one. The staff that we spoke to at the boarding gate were just not interested in helping. I felt dreadful, I am registered as disabled. I felt as if I should have been holding my disabled blue badge to show them I am real.

Female, Age 60-64, Disabled, North East

"

It was very expensive overall which made it quite inaccessible. The signage was poor and it is difficult to find out where you needed to be and the airport was noisy so we couldn't hear the announcements.

Female, Age 18-24, Financially vulnerable, South-West

Q25. Why were you dissatisfied with the overall travel experience? Please tell us about any issues you had. Base: All who said that they were dissatisfied with their overall travel experience (n= 261).

Passengers in certain vulnerable circumstances are less satisfied with their journey than those who are not vulnerable

At overall level, satisfaction remains high at +80% for all passengers and for consumers facing personal circumstances or language barriers. However, satisfaction is notably lower for those in other vulnerability groups– accessibility/disability (82%), digital (80%), and financial vulnerabilities (80%). These groups experience gaps of 7 to 9pp compared to their non-vulnerable counterparts, highlighting a significant difference in overall satisfaction.

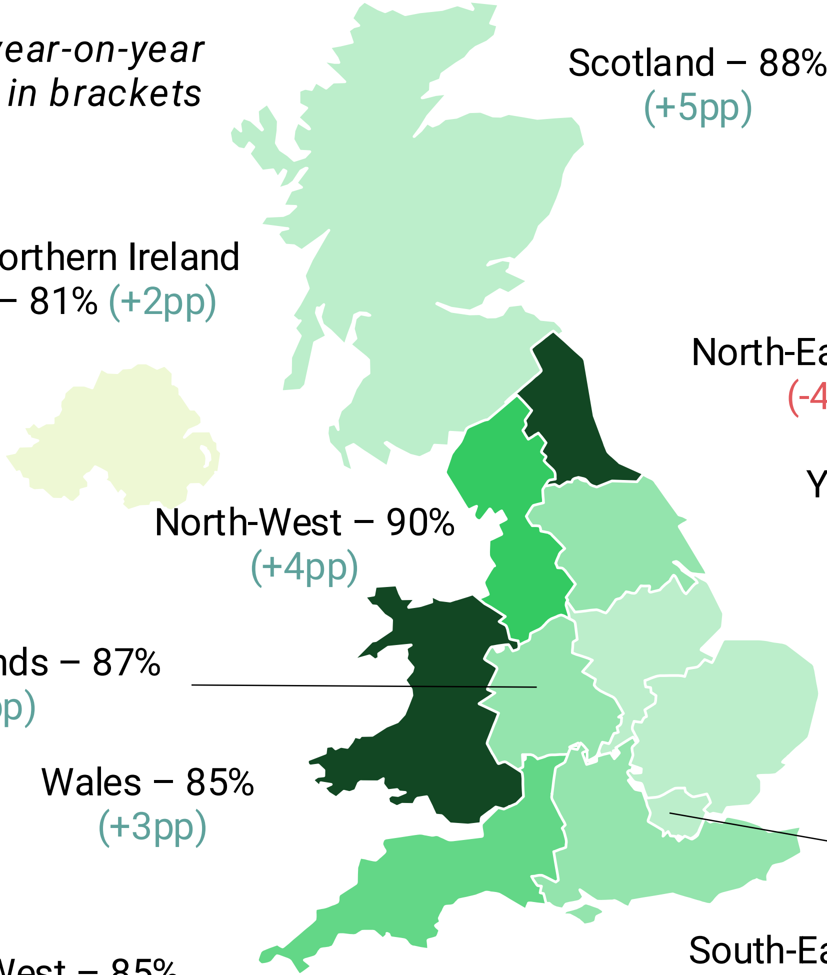
Showing % who were satisfied with the overall travel experience on their most recent flight, by different lenses of vulnerability*

	Not vulnerable (Those who do not fall within the listed vulnerability groupings)	Personal circumstances (Those travelling with children) *Please note: for this question, this group only includes those who travelled with children on their last flight, as non-flyers in the past year were not asked this question.*	Language / Communication (Those who report needing communication support when flying)	Accessibility and disability (Those with a disability or have accessibility needs)	Digital (Those not digitally confident or who need assistance with technology)	Financial (Those who are unable to pay an unexpected bill)
	89%	90%	90%	82%	80%	80%
Gap compared to those not vulnerable**:		+1pp	+1pp	-7pp	-9pp	-9pp

Q24.14. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=2,164). *Please note, these vulnerability groupings are new additions for 2025 therefore there is no year-on-year data comparisons. **A positive gap, where a vulnerability group scores higher than the non-vulnerable group, is highlighted in green text and a negative gap is shown in red text to clearly indicate a lower percentage compared to the non-vulnerable group.

Despite a slight decline in the North-East and South-West, satisfaction scores have mostly increased or stayed stable in 2025 meaning satisfaction is +80% across all UK regions

Showing year-on-year changes in brackets



Last year, passengers in Northern Ireland reported a significant increase in satisfaction with their most recent flight (79%), with their satisfaction score increasing by +19pp since 2023 (60%). For 2025, satisfaction has stayed stable for Northern Ireland, a region that has fluctuated in satisfaction over the years of tracking. This stable increase in satisfaction for Northern Ireland means that satisfaction is +80% for all regions across the UK. Although an improving picture, Northern Ireland still lags behind other UK regions in terms of satisfaction.

Last year, Wales was an outlier being the only region to have witnessed a decline in satisfaction (-6pp from 2023). However, this year, that decline has reversed slightly with an uptick of +3pp since 2024.

In contrast, this year the North-East and South-West, are the only regions to see a notable decline in satisfaction. They continue to have a high score overall, but this dip might be a result of a decline in satisfaction with passport control and immigration (-9pp since 2024) for North-East and a decline in satisfaction with transfers and connections (-7pp since 2024) for the South-West.

Q24.14. The overall travel experience: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=2164). *Note: this diagram shows satisfaction by region of residence, not region from which consumers flew*

Section 1.3:

Satisfaction across the passenger journey

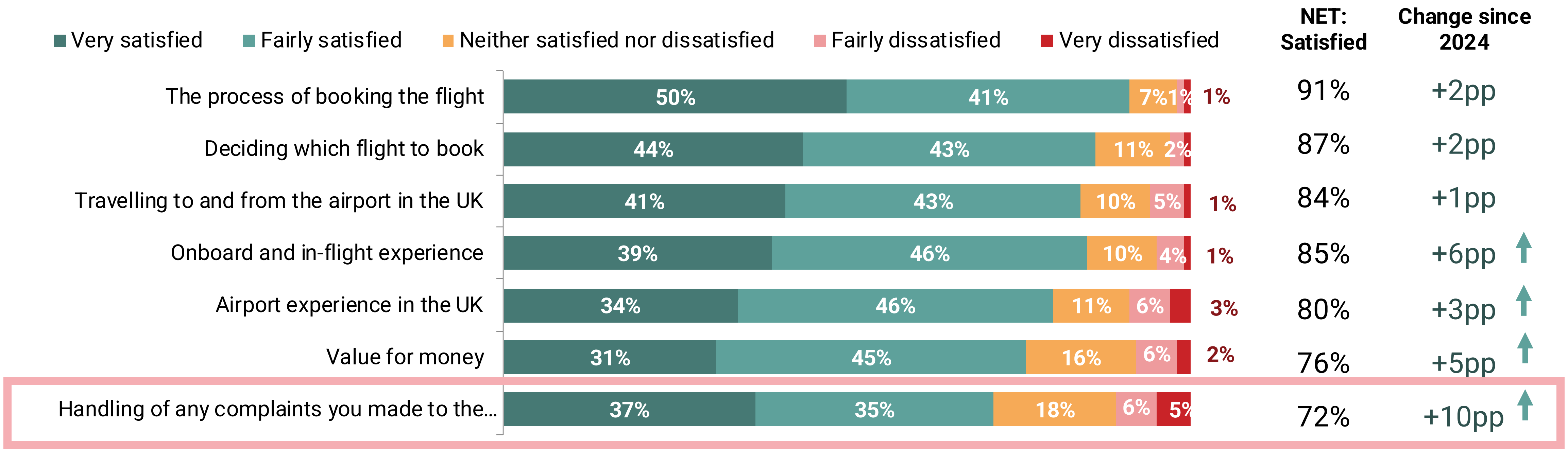
Key takeaways from this section:

- Passenger satisfaction has increased across all areas of the passenger journey, with especially strong gains in complaint handling and consistently positive scores throughout the consumer experience. While the upward trend in complaint handling satisfaction—already seen in 2024—continues, it is worth noting that satisfaction in this area still falls short of many other aspects of the journey.
- The booking process continues to be the element of the travel experience which sees highest satisfaction, increasing by 2pp in 2025, though most passengers would still like more information around cost.
- This broad improvement is reflected in the overall flying travel experience, with satisfaction scores higher than in previous periods. Gains at nearly every stage of the journey – except for two areas that have held steady at their 2024 scores – are collectively driving the overall rise in satisfaction.
- However, it's important to note that consumers in specific vulnerable circumstances continue to report lower levels of satisfaction, especially due to ongoing accessibility concerns with airport navigation.

Passenger satisfaction scores have continued to increase across the board this year, with particularly strong gains in complaints handling. This marks a notable upward trend in an area that had previously seen declines in recent years

Last flight: Satisfaction with elements of the travel experience

All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



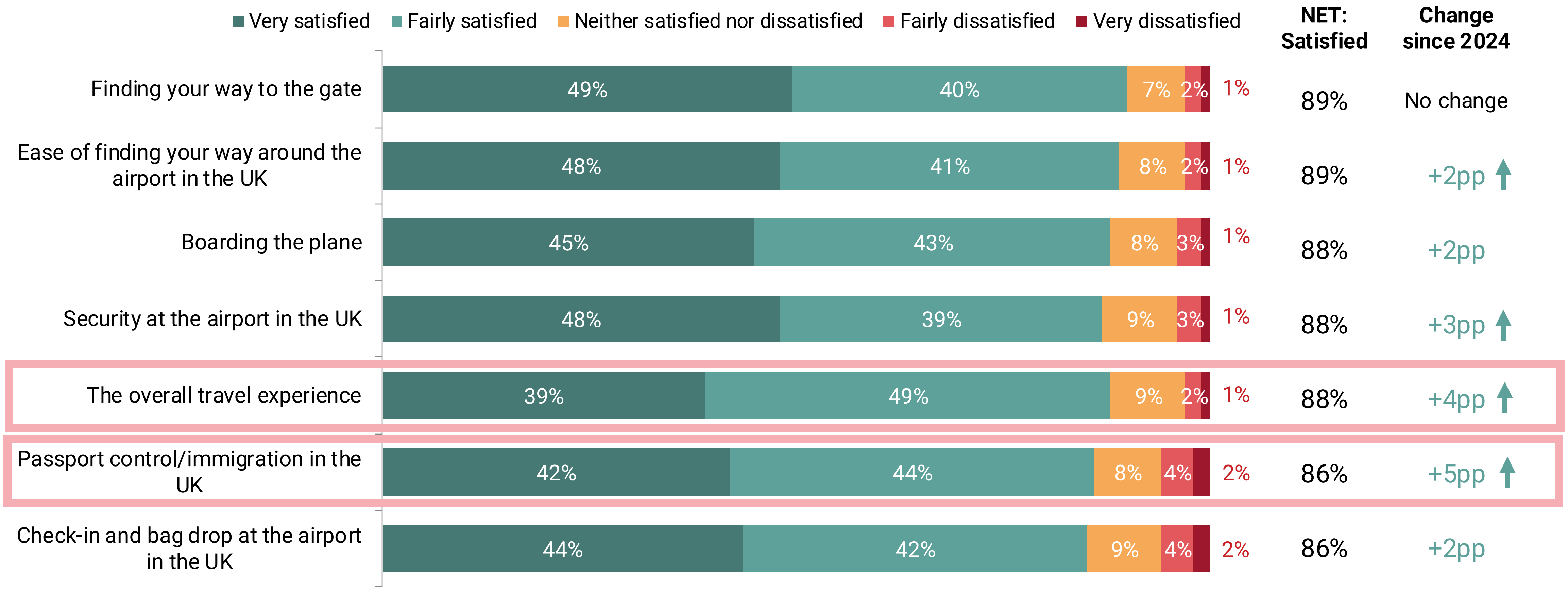
With a year-on-year increase of 10pp, satisfaction with complaints handling continues to rise following a 12pp rise in 2024. While it remains the element of the travel experience with the lowest levels of satisfaction, this reversal in this post-pandemic decline is likely a significant factor in the increase overall. Other areas showing steady improvement in recent years—and an increase of 5pp or more this year—include the onboard and in-flight experience, as well as perceived value for money. The flight booking process continues to be the highest scoring aspect in 2025, with satisfaction increasing by 2pp in both 2024 and 2025.

Q23. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 978-2162)

Looking at the more specific touchpoints in the airport consumer journey, satisfaction has increased since 2024 at every journey point except two, which remained stable. No touchpoints saw a decrease in satisfaction in 2025

Satisfaction with the airport experience – Page 1 of 2 (highest performing areas)

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'

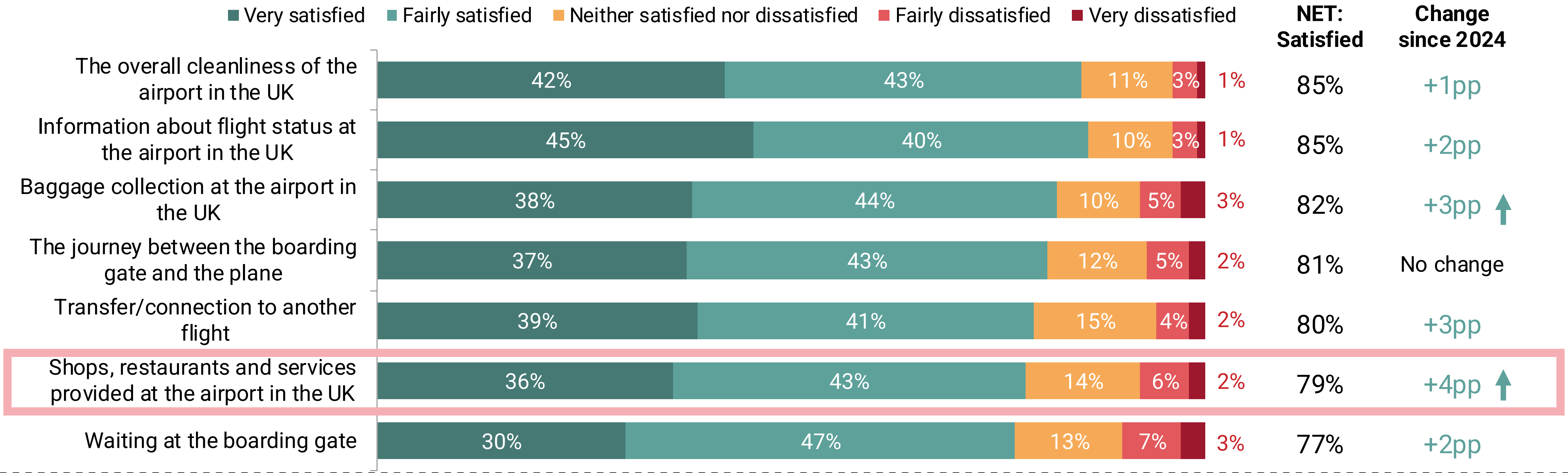


Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements?
Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1028-2164)

Every element of the airport experience now records satisfaction of 77% or above, reflecting broad improvements across the overall passenger journey

Satisfaction with the airport experience – Page 2 of 2 (lowest performing areas)

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'



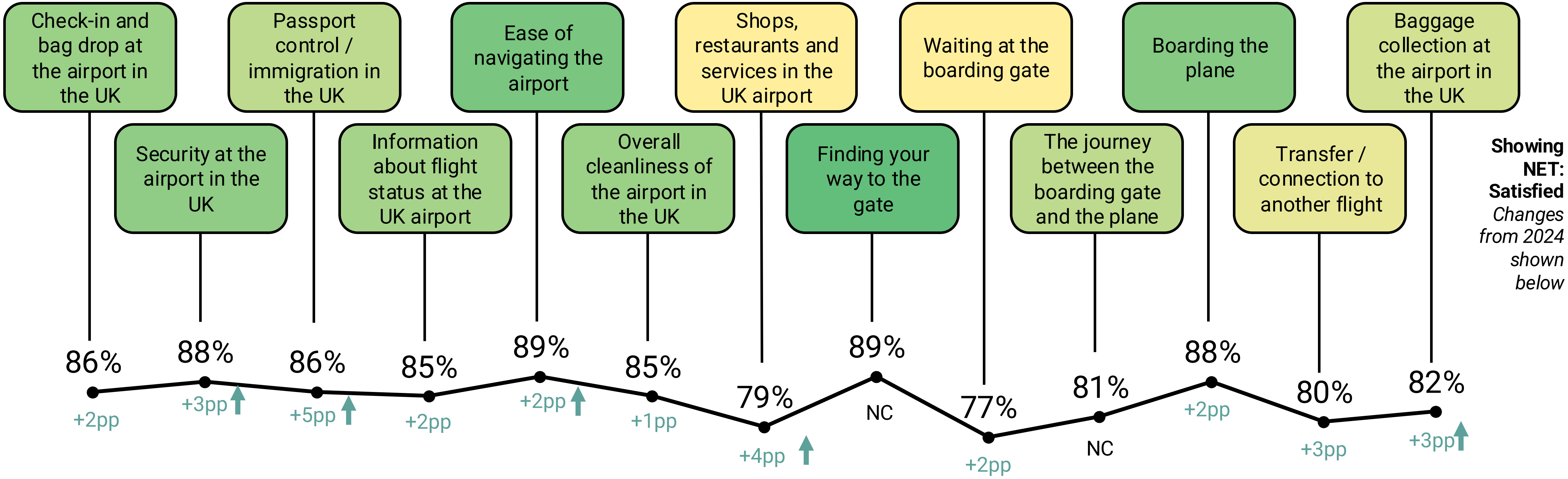
The most significant change from 2024 to 2025 was seen in passport control/immigration (+5pp), shops, restaurants and services provided (+4pp) along with the overall travel experience (+4pp). Encouraging progress was also seen in waiting at the boarding gate – though the lowest score, a rise of 2pp saw scores return to 2023 levels after a dip of 2pp in 2024. Overall, the passenger journey in 2025 presents a positive picture, with satisfaction improving across most areas. The only exceptions are the journey from the boarding gate to the plane and navigating to the gate, which have remained stable rather than increasing. Among passengers dissatisfied with the UK airport experience, most were dissatisfied with shops, restaurants and services provided (37%), waiting at the boarding gate (36%) and the journey between the boarding gate and the plane (29%).

Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements?
Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1028-2164)

Consistently positive scores across touchpoints have made the overall travel journey more balanced, likely contributing to the increase in satisfaction with the overall travel experience

Showing satisfaction with the airport experience, in chronological order

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'



According to a behavioural science principle known as the '**peak end rule**', consumers will typically judge an experience based on its most intense points – whether positive or negative – and the end of that experience. This year, both previously low-scoring stages of the consumer journey, airport services and waiting at the boarding gate, have seen notable increases in satisfaction, reducing their negative impact. Satisfaction in these areas continues to grow since 2024.

Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1028-2164)

However, for vulnerable passengers who are not digitally confident or have disability/accessibility needs, satisfaction scores for airport wayfinding is markedly lower

Note: Due to a change in vulnerability definitions from 2024 to 2025, direct comparisons to 2024 scores are not possible

Recent flyers with digital or accessibility vulnerabilities are significantly less likely to be satisfied with...

	Digital	Accessibility	Not vulnerable
Finding your way to the gate	78%	85%	91%
Ease of finding your way around the airport	81%	84%	90%
Information about flight status	76%	82%	88%

Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1028-2164)

Section 1.4:

The experience of passengers with accessibility needs and disabilities

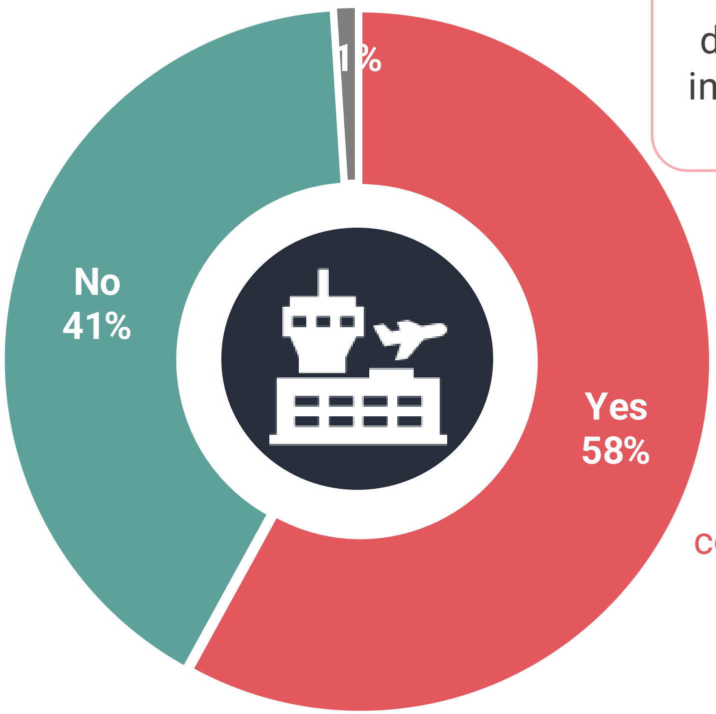
Key takeaways from this section:

- Disabled passengers and those who require assistance continue to have a markedly different experience from the wider flying public in 2025, echoing the trends seen in 2024. While overall satisfaction with air travel has risen, the gap between disabled and non-disabled passengers has widened further.
- The need for assistance is a key barrier to flying, with those who have not flown in the last 12 months most likely to require assistance in an airport or while flying.
- Consumers with non-visible and physical disabilities continue to be most likely to require a form of assistance while flying.

The proportion of disabled consumers facing difficulties in accessing or using airports and flying has remained largely unchanged since 2024. New data in 2025 suggests that among all passengers, 15% would need assistance were they to travel

Difficulty in accessing/using airports or flying

All who have a disability



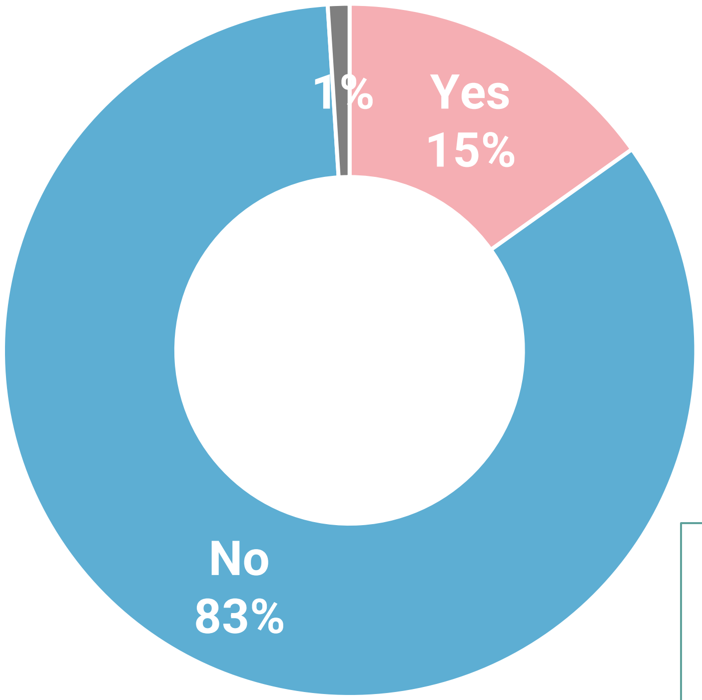
+2pp compared to 2024

-1pp compared to 2024

Very minimal/no differences noted in sub-groups from 2024-2025

Would you need specific assistance from the airport or airline if you were to fly in the future?

All respondents



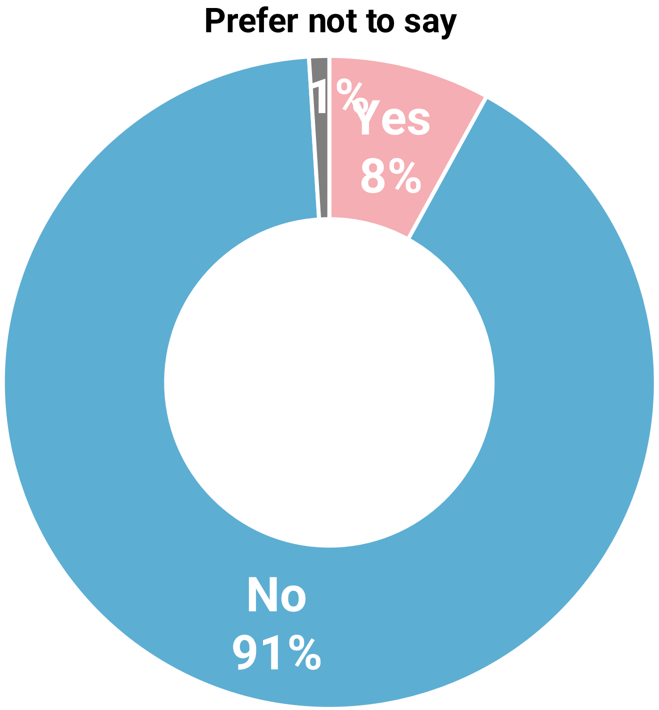
Those who have not flown in the last 12 months are more likely to require assistance, indicating the need for assistance may be a barrier to travel

Note: Due to a change in vulnerability definitions from 2024 to 2025, direct comparisons to 2024 scores are not possible for Q15b

Q12. Does/would your disability or health condition make accessing and/or using airports or flying difficult? Base: All who have a disability or health condition (n=686) Q15b. If you were to fly in future, would you need or think you would need specific assistance from the airport or airline? Base: All respondents (n=3500)

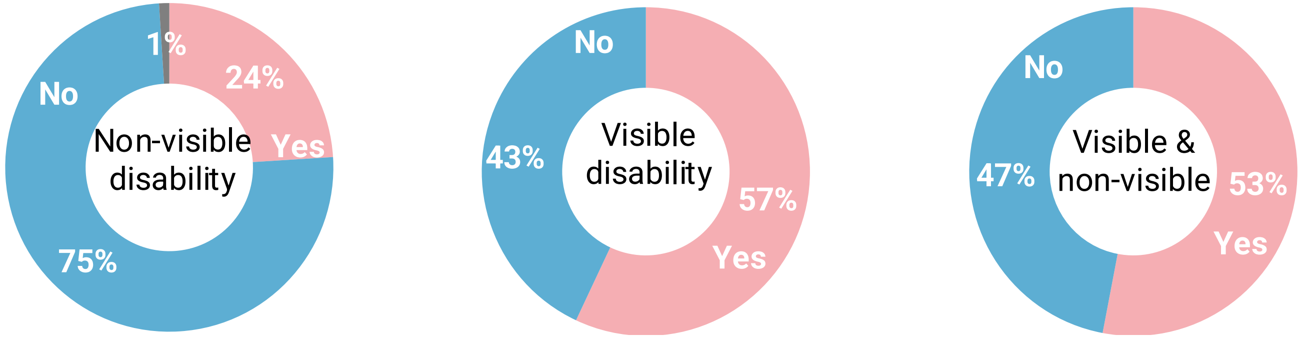
About one in ten needed airport or airline assistance on their last flight. Passengers with a non-visible disability and physical disabilities or health conditions were more likely to require assistance on their most recent flight

Did you need specific assistance from the airport or airline on your most recent flight?
All who have flown in the last 12 months

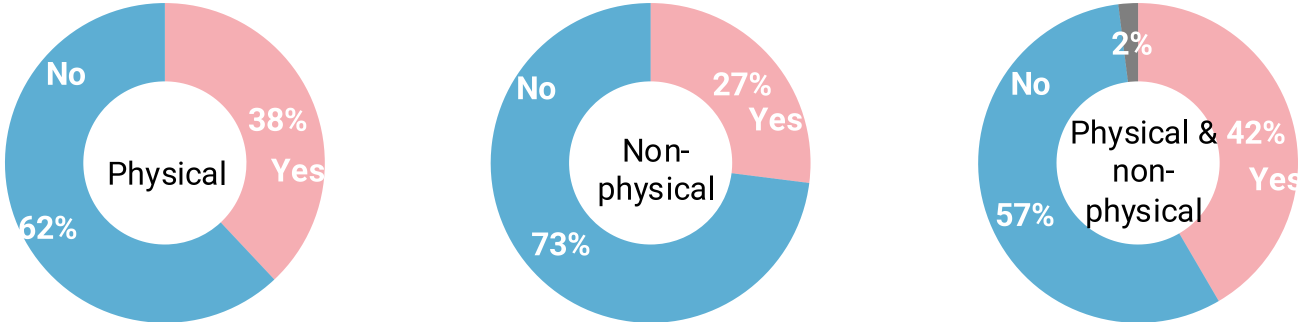


Note: Due to a change in vulnerability definitions from 2024 to 2025, direct comparisons to 2024 scores are not possible for Q15a

Assistance is required more amongst passengers with visible disabilities, and those with both visible *and* non-visible disabilities:



And assistance is required more amongst passengers with physical disabilities, and those with both physical *and* non-physical disabilities:



Q15a. Thinking about your most recent flight, did you need specific assistance from the airport or airline? Base: All who have flown in the last 12 months (n=2173)

Disabled passengers remain less likely to have flown in the past 12 months. While their overall satisfaction with their most recent flight has remained unchanged, the gap in satisfaction between disabled and non-disabled passengers has widened

Showing flying behaviour and satisfaction with the overall travel experience on the most recent flight amongst recent flyers, by disability status

Percentage-point changes since 2024 shown

	All consumers	Disability	No disability
Flown in last 12 months	62% No change	42% +1pp	68% +1pp
Satisfied with most recent trip (recent flyers only)	88% +3pp	82% No change	89% +5pp

Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Base: All respondents, 2025 (n=3,500) including those with (n=686) and without (n=2763) a disability or health condition. Q24.14. Please tell us how satisfied or dissatisfied you were with the overall travel experience? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=2,164), including those with (n=286) and without (n=1863) a disability or health condition.

Disabled passengers still report lower scores by comparison at a few touchpoints in their journey

Disabled recent flyers are significantly less likely than non-disabled passengers to be satisfied with…

	Disability	No disability
Onboard and in-flight experience	81% (+6pp)	86% (+6pp)
Airport experience in the UK	75% (+6pp)	81% (+3pp)
Handling of complaints	66% (+7pp)	74% (+12pp)

Changes from 2024 shown below

There are three satisfaction metrics which continue to see significantly lower scores amongst disabled passengers, despite these scores seeing improvements since 2024– two concerning the travel experience, and one complaints handling.

The largest gap is in satisfaction with the handling of any complaints made to the airport or airline, with only 66% of disabled passengers satisfied compared to 74% of non-disabled passengers. This was most pronounced among financially vulnerable passengers at 64% (vs 70% for those without vulnerabilities).

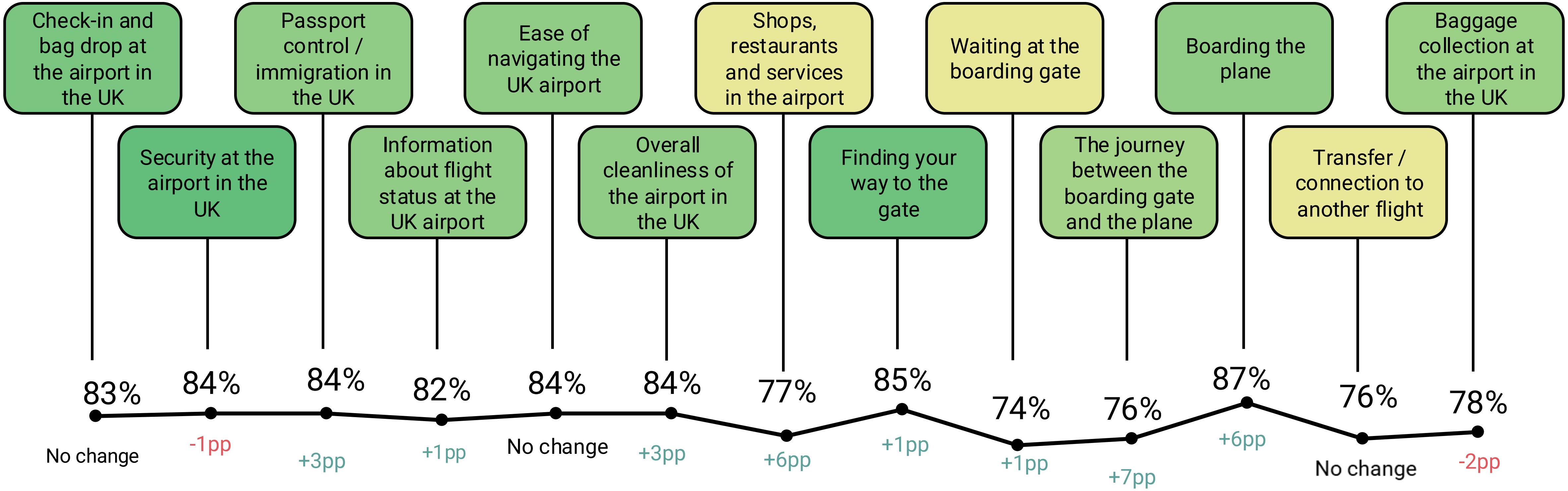
Q23. How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses, including those with (n=233,218,94) and without (n=1594,1498,612) a disability or health condition.

At certain stages of the airport experience, disabled passengers report the lowest levels of satisfaction—specifically when waiting at the boarding gate, travelling between the boarding gate and the plane, and transferring to another flight

Showing
NET: Satisfied
Changes from 2024 shown below

Showing satisfaction with the airport experience, in chronological order (Disabled consumers only)

Includes only those who have flown in the last 12 months, and excludes those answering 'Don't know' and 'Not applicable'

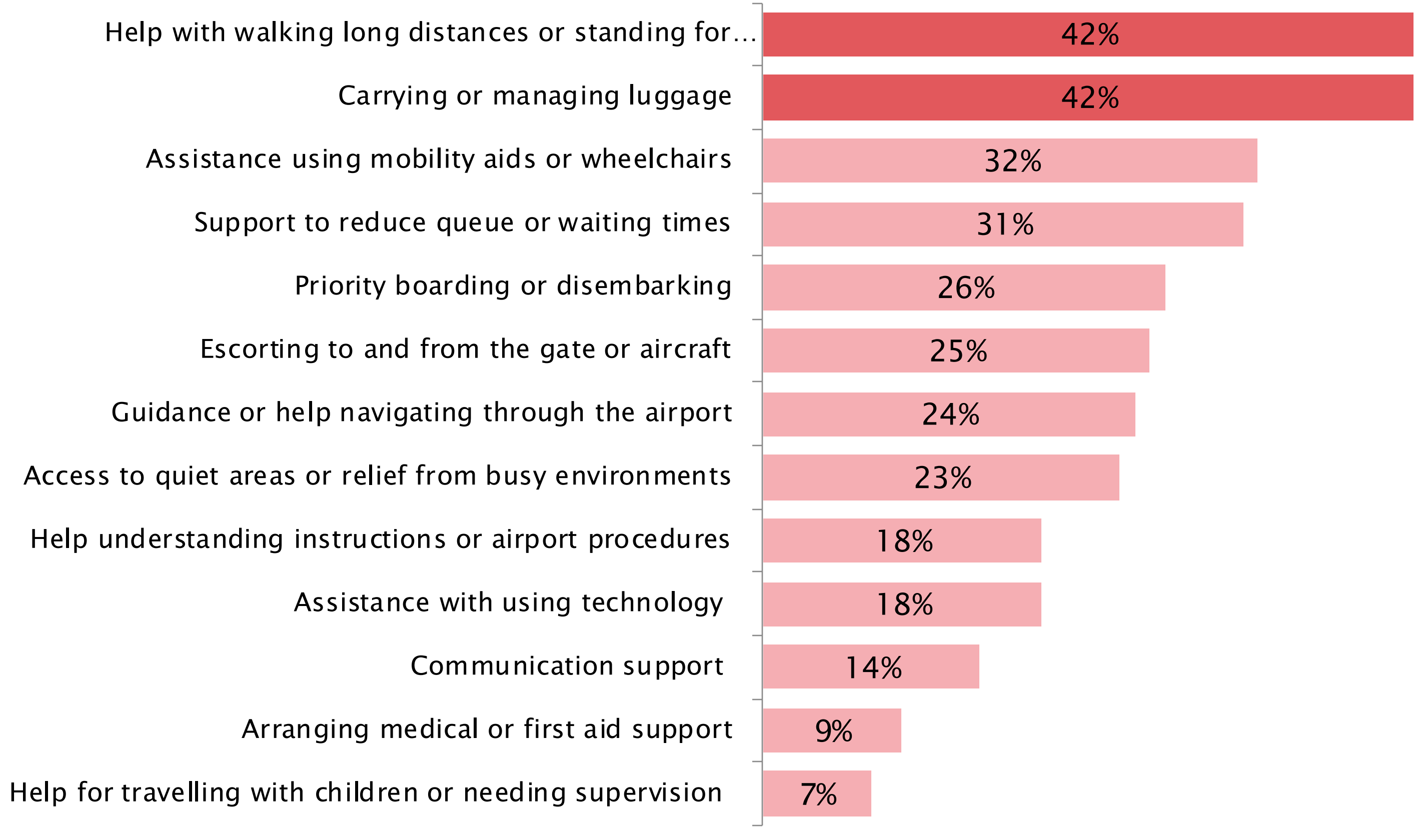


Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All consumers with a disability or health condition who have flown in the last 12 months, excluding DK and NA responses (n=142-289)

The most common forms of assistance passengers have needed, or would need, are help with walking or standing for long periods and carrying or managing luggage

Reasons passengers have needed, or would need, assistance

Showing percentage who say the following



Among those who expect to need assistance, older passengers are most likely to need help with walking long distances or standing (64%).

Within vulnerable groups, 80% of those experiencing digital vulnerability anticipate requiring support with technology, such as check-in kiosks, while 70% of those facing language or communication challenges are likely to need help understanding instructions or airport procedures.

Q16a. What are the reasons you needed or would need specific assistance? Base: All who require assistance when making a flight or would need it in future (n=551)

Section 2.1:

Consumer priorities, value for money and hidden charges

Key takeaways from this section:

- The cost of flying remains the leading priority (52%) among consumers for the aviation industry to invest on in the next 12 months. Overall, more than half (54%) report taking actions to cut costs on their most recent flight—such as choosing less convenient travel times or bringing only hand luggage.

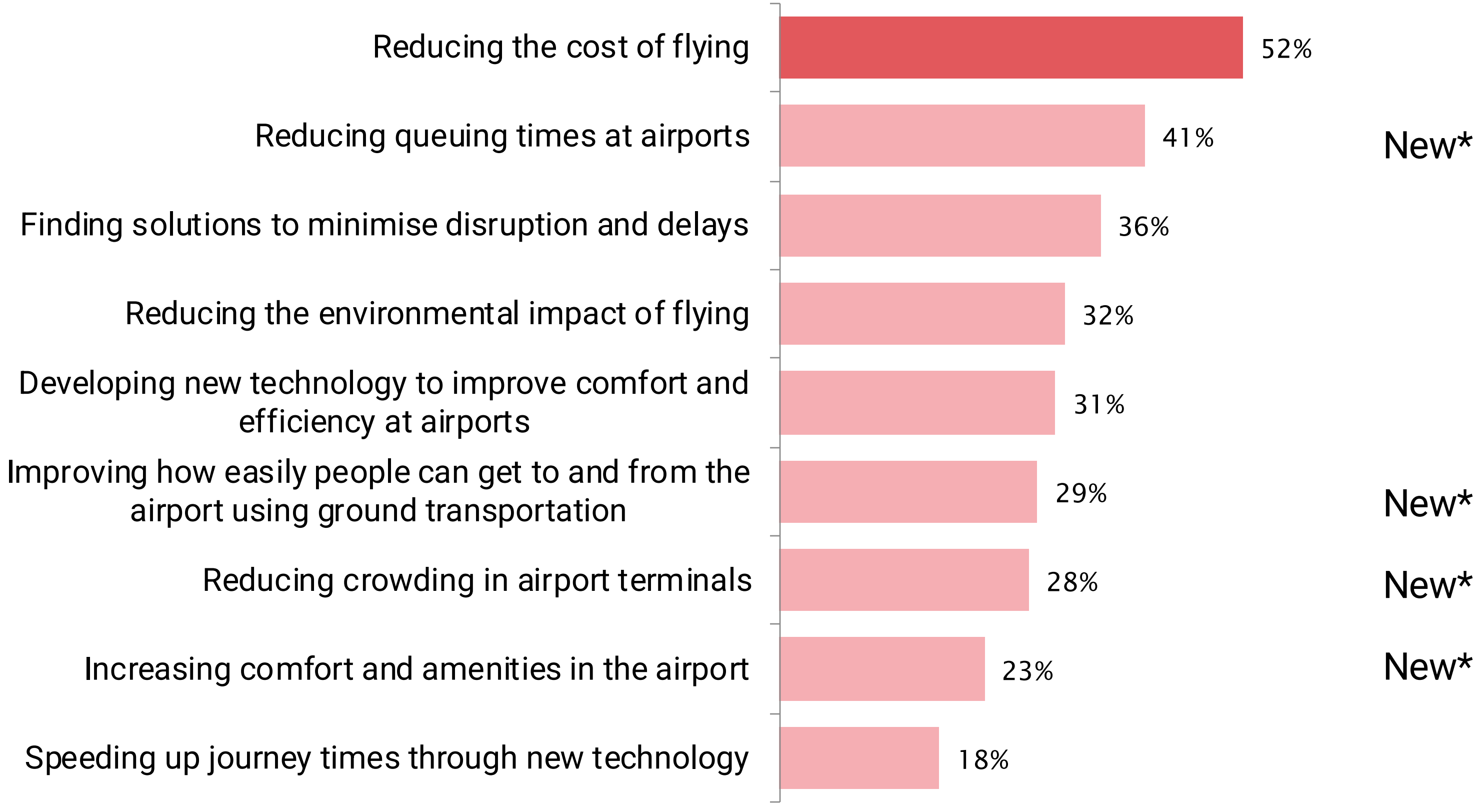
- Despite widespread concerns over cost, satisfaction with value for money has increased to 76%, returning to pre-pandemic levels.

- While many passengers are aware of what’s included in their airfare, overall awareness remains inconsistent. Notably, about one in four passengers are unaware of specific extra charges—such as fees for printing boarding passes at the airport (24%) or making the booking (27%).

Lowering airfares is still the top priority for consumers when it comes to the aviation industry

How the UK public would prioritise areas for investment in the aviation industry over the next 12 months

Showing % who placed the following priority areas in their top 3



Reducing the cost of travel is the main priority for younger age groups, while for those aged 55+, their main priority is reducing queueing times at airports.

	18-34	35-54	55+
Reducing the cost of flying	**53%**	**57%**	46%
Reducing queueing times at airports	32%	39%	**48%**

*A direct comparison to last year is not recommended for this question since four new options have been added this year - differences may reflect the altered choices rather than real shifts in respondent views or behaviours.

Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas?
Base: All respondents (n=3,500).

While specific vulnerabilities have an influence over consumer priorities, reducing the cost of flying is universally important for all groups

Showing % who placed the following priority areas in their top 3 by vulnerability status

	Not vulnerable	Personal circumstances *(22% of sample)*	Language / Communication *(4% of sample)*	Digital *(8% of sample)*	Accessibility and disability *(21% of sample)*	Financial *(29% of sample)*
#1	Reducing the of flying 49%	Reducing the cost of flying 51%	Developing new technology 51%	Reducing the cost of flying 45%	Reducing the cost of flying 47%	Reducing the cost of flying 61%
#2	Reducing queuing times 42%	Developing new technology 43%	Reducing the cost of flying 47%	Reducing queuing times 42%	Reducing queuing times 39%	Reducing queuing times 38%
#3	Minimising disruption and delays 40%	Reducing queuing times 39%	Minimising disruption and delays 33%	Reducing crowding in airport terminals 36%	Reducing environmental impact / Reducing crowding 33%	Minimising disruption and delays 33%

*All figures in this report have been rounded to the nearest whole number. Further details can be found in the 'How to read this report' at the beginning of the report.

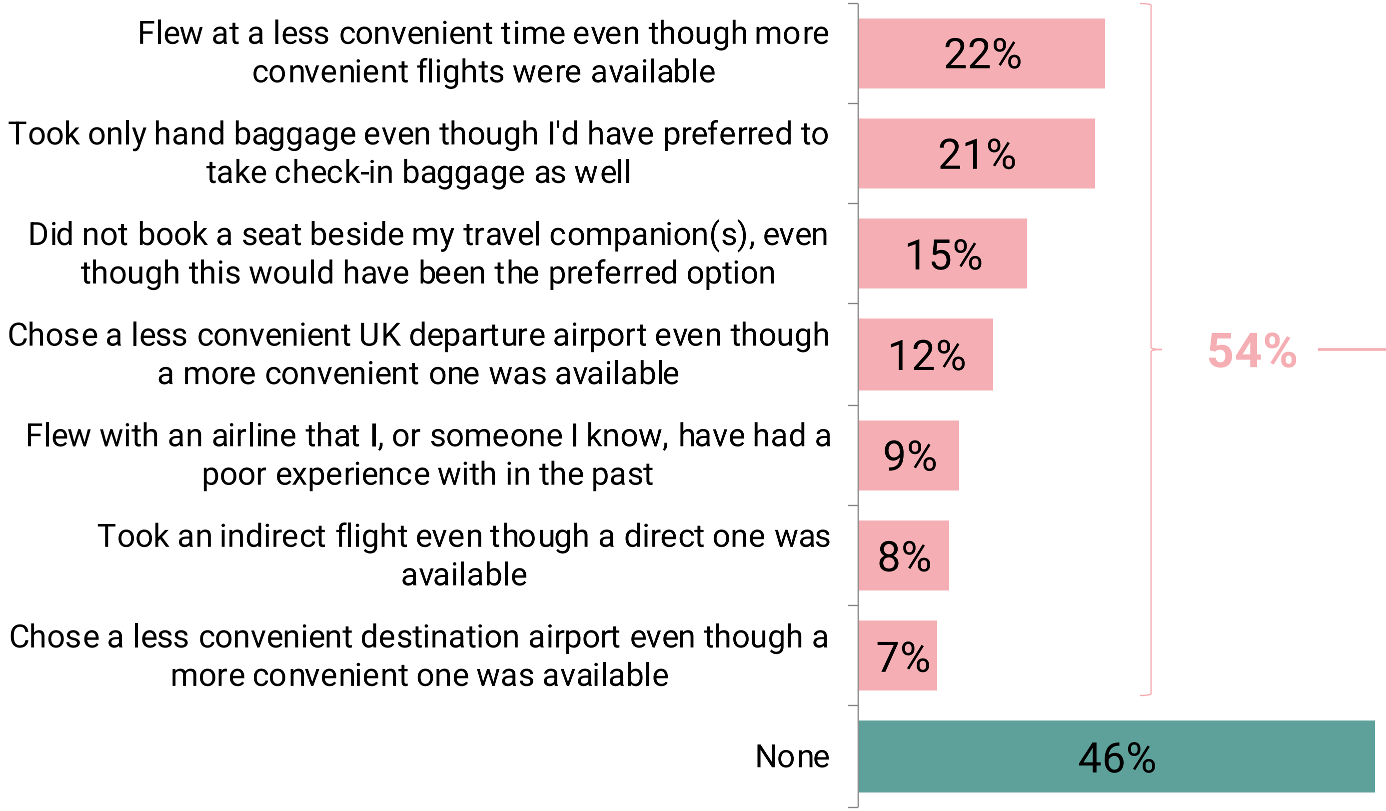
Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas? Base: All respondents (n=3,500).

Savanta:

Reflecting cost concerns, over half of passengers claim they took actions for their last flight to save money, with flying at a less convenient time and taking only hand luggage being the most common among them

Actions passengers have taken to save money on their last trip

Among those who have flown in the last 12 years



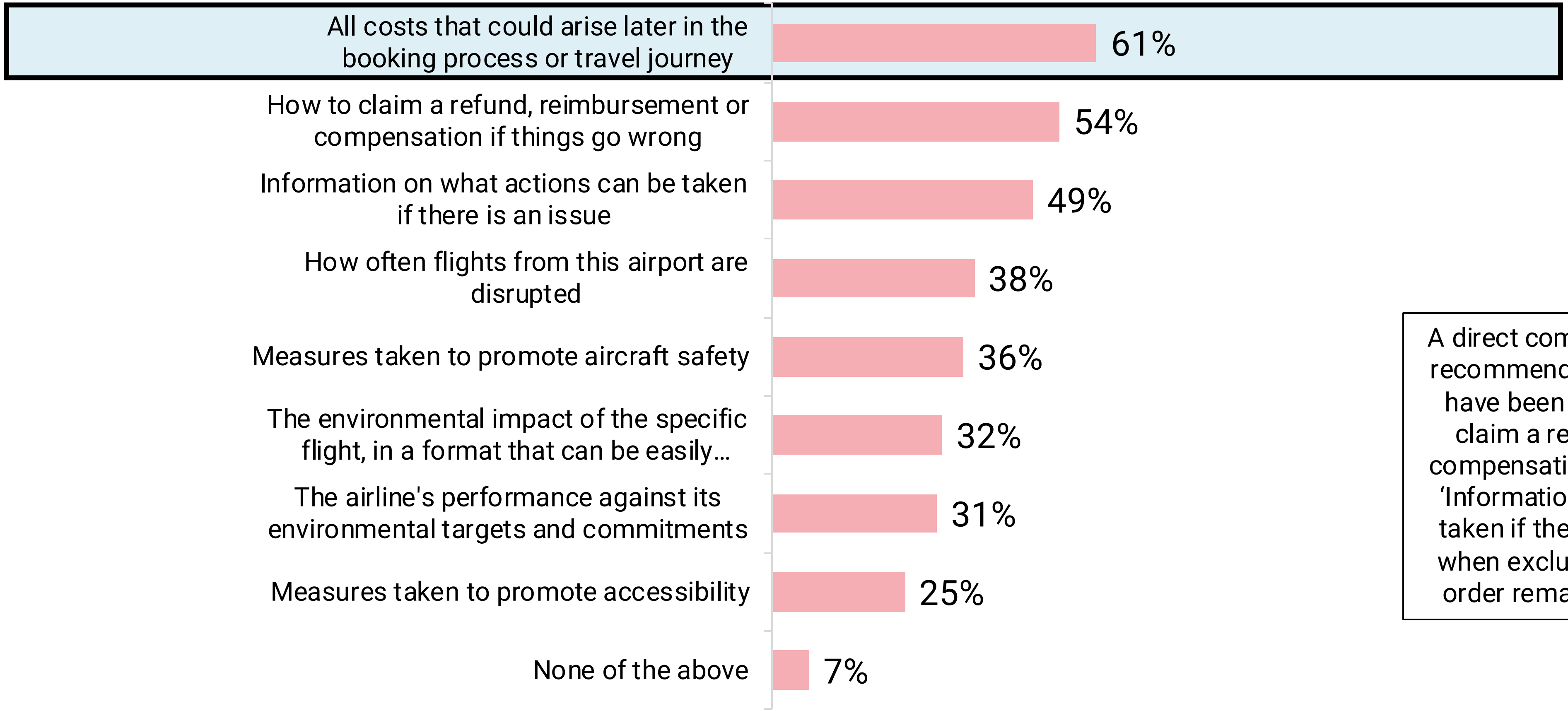
Taking any of the actions listed is more common among younger age groups as well as those considered vulnerable.

18-34: 71%, 35-54: 55%, 55+:39%
Not vulnerable: 46%, Vulnerable: 66%

Q21. Still thinking about this most recent flight, did you do any of the following to save money on your trip? Base: All who have flown in the last 12 months (n=2173).

To enable these savings, there is a strong desire from consumers for more transparency on cost information at the point of booking a flight

Showing percentage of consumers who would like to see more information in the following areas at the point of booking a flight

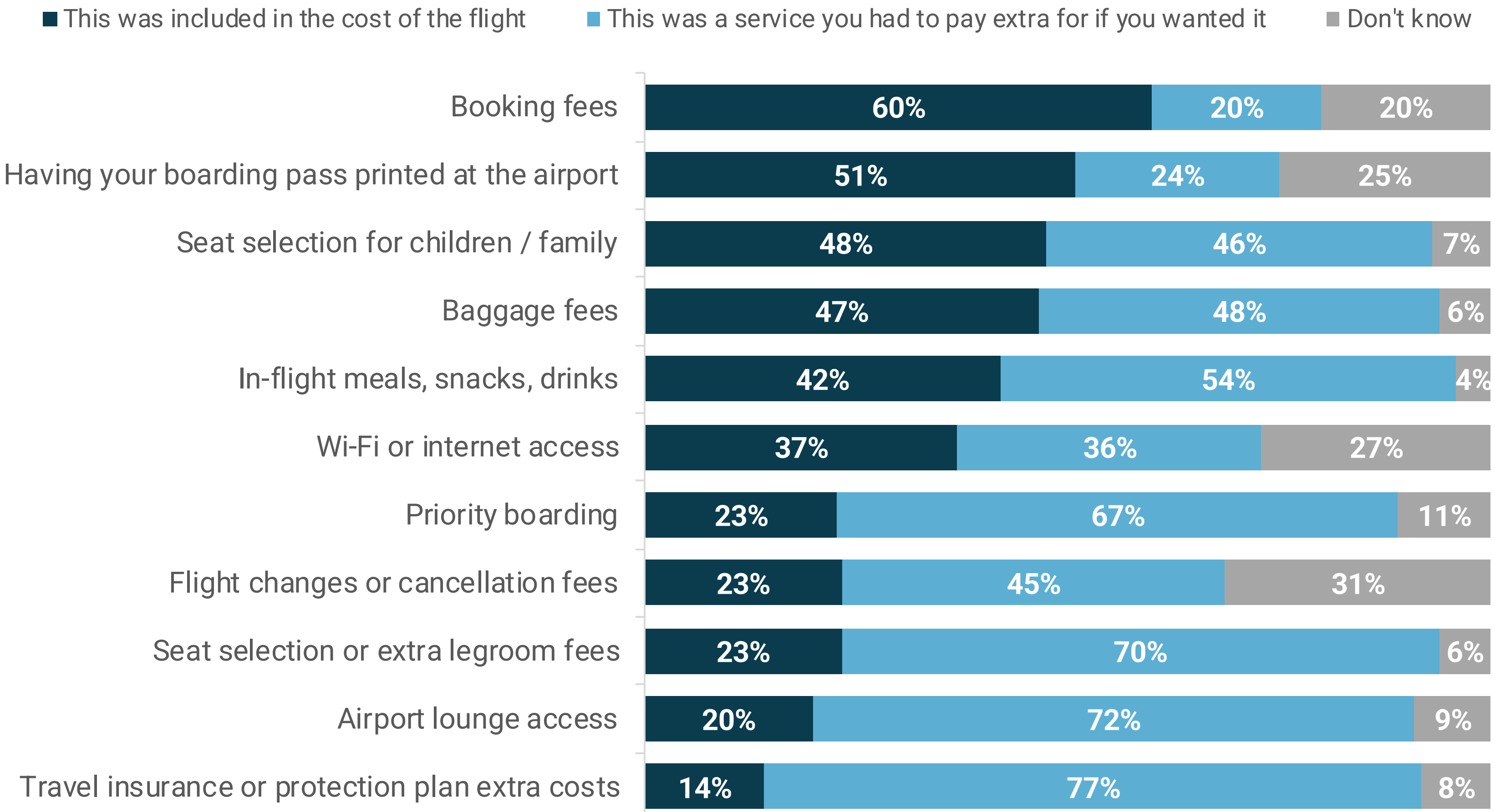


A direct comparison to last year is not recommended since two new options have been added this year (‘How to claim a refund, reimbursement or compensation if things go wrong’ and ‘Information on what actions can be taken if there is an issue’). However, when excluding the new options, the order remains the same as in 2024.

Q10. In which of the following areas, if any, would you like to see more information at the point of booking? Base: All respondents (n= 3500).

Awareness of what passengers thought was included in their airfare is uneven, reflecting inconsistencies in how airlines apply extras such as seat selection, baggage, and booking fees across flight classes, fare types, and policies

Showing % of recent flyers that thought the following was included in the cost of their flight or whether they had to pay extra for it



For example, while six in ten flyers believe booking fees were included in their last flight, and only two in ten recall paying extra. This discrepancy is likely due to:

- Varying airline practices: Some airlines absorb or bundle these fees into the total fare, while others list them as separate charges at checkout.
- Differences in how costs are presented: Full-service carriers may hide or waive fees as part of consumer service, while low-cost or budget airlines tend to itemise and charge these fees separately.

Similarly, the near-even split in awareness over whether child or family seat selection was included (48% say yes, 46% no) likely reflects differences in both ticket class and airline policy. Premium cabins often bundle in more perk including seat selection for families, whereas basic economy fares are more restrictive and may add fees for these services.

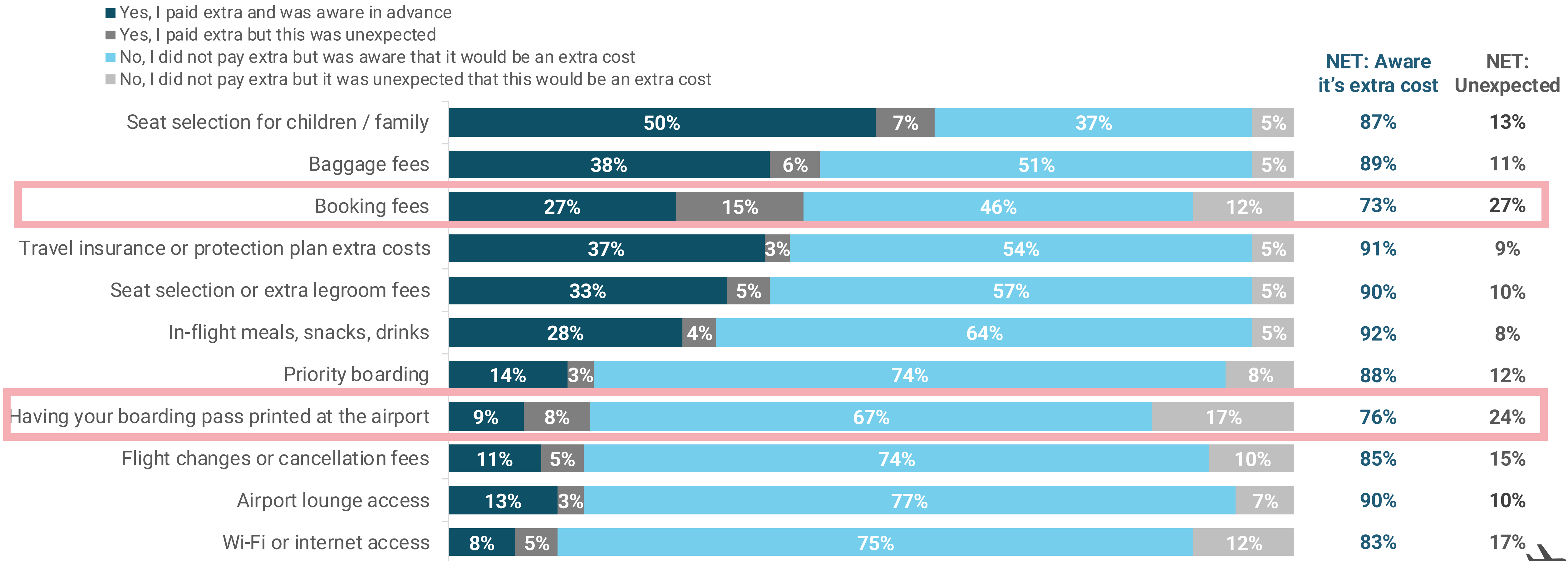
It is also worth noting passengers' recall biases - many may not notice or remember subtle processing charges, especially if they're embedded in the final price.

Q22a. On your most recent flight, were each of the following services included in the cost of your flight or were they extra services that you had to pay for? Base: All who have flown in the last 12 months (n=2173).

The gap in knowledge can result in unexpected extra costs, with booking fees, as well as charges for printing boarding passes at the airport, most frequently identified as unexpected by recent flyers

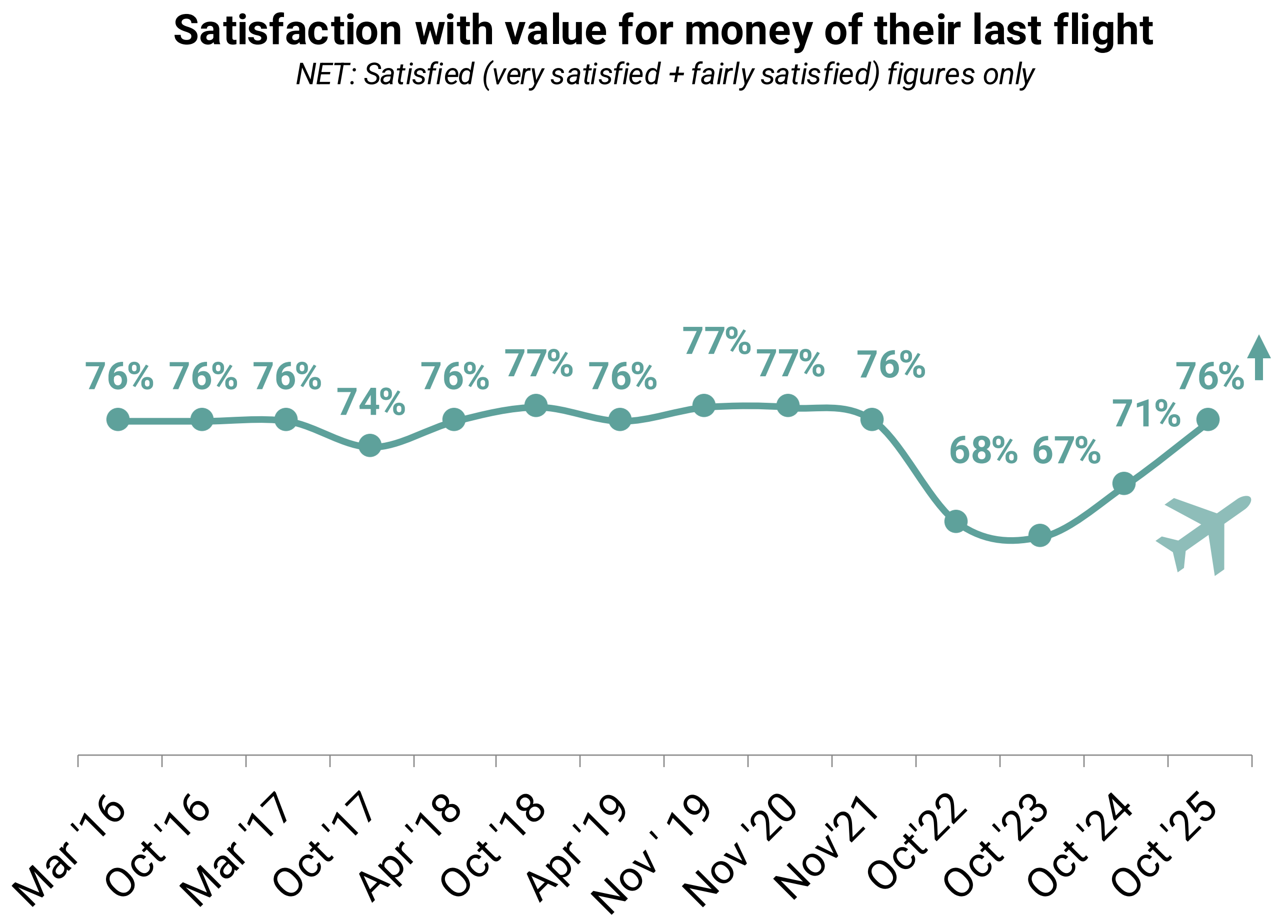
Showing % of recent flyers and whether they did or did not pay extra for each of the following services that were an additional cost on their flight

% of those who would have had to pay extra for each service



Q22c. For each of the following services that were paid extras, did you pay for this extra service on your most recent flight, and did you know beforehand that there would be an extra cost? Base: All who had extra services that could be paid for on their most recent flight (n=223-1683).

Despite taking measures to minimise costs and avoid unexpected costs, overall satisfaction with value for money is high and shows similar levels to before 2022



Context
The dip between 2022 and 2024 may be due to a mismatch between rising prices and impaired service quality during the turbulent post-pandemic recovery. In 2025, operations and pricing seem to have stabilised, which has resulted in better perceptions on value for money.

Satisfied with the value for money of last flight

	Disability	No disability	Gap
October 2024	64%	72%	-8pp
October 2025	75%	76%	-1pp

In previous years we have observed a gap in satisfaction with value for money among disabled and none disabled consumers. This year the gap is negligible.
This trend also applies to individuals identified as vulnerable according to the approach set out in slide 9.

Q23. Value for money: How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 2150)

Section 2.2:

Travel disruption and complaint handling

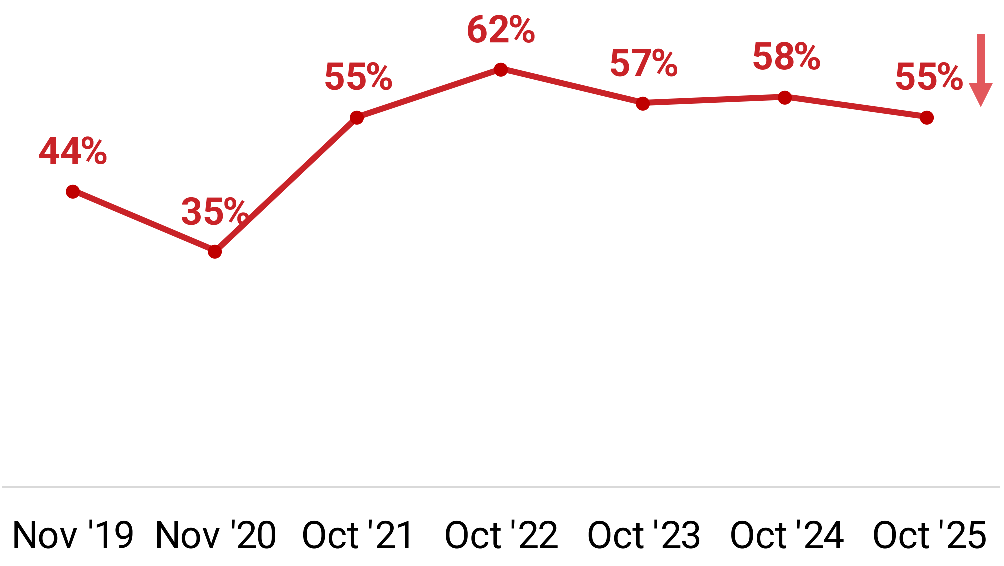
Key takeaways from this section:

- Travel disruption was experienced by fewer passengers than last year, with reports of flight delays also declining marginally.
- Over half of passengers who experienced a travel problem reported not being informed of their rights at the time, with this issue especially evident among those whose flights were delayed.
- Understanding of entitlement terms among consumers is inconsistent, suggesting uncertainty about the distinctions between "refund," "compensation," and "reimbursement," and their correct application during air travel and disruption.
- When asked, one in five consumers expressed dissatisfaction with the clarity and speed of information they received during disruption.
- Despite ongoing communication challenges, it’s encouraging to see that satisfaction with complaint handling has improved markedly—even as the number of complaints remained steady compared to last year. Passengers cited notable progress in the ease of reaching support, faster response times, and a smoother complaint process, leading to more positive outcomes overall.

Travel disruption has decreased this year, but passengers are experiencing more airport crowding and queuing

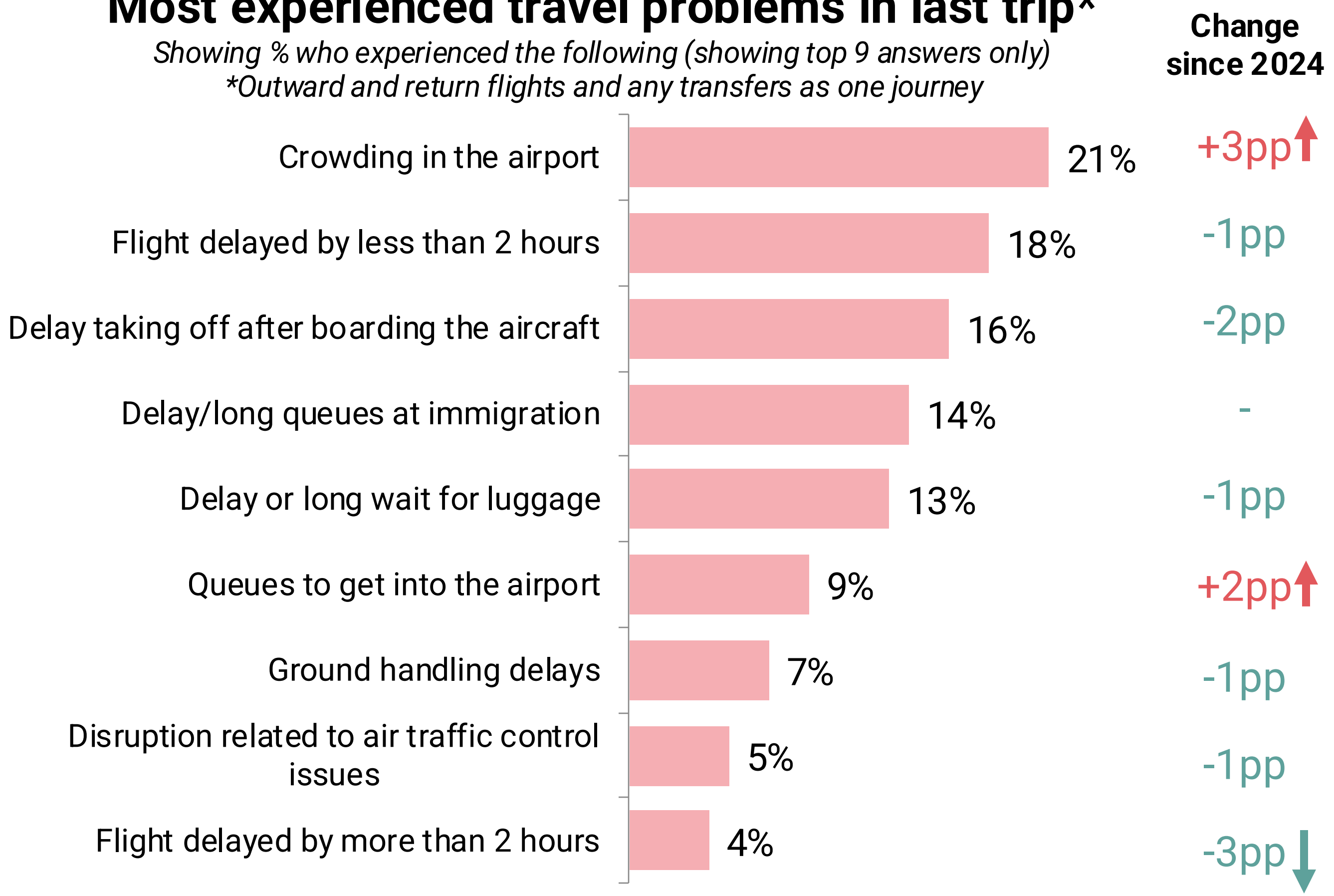
Proportion of recent flyers facing any travel problem

Among those who have flown in the last 12 months



Most experienced travel problems in last trip*

Showing % who experienced the following (showing top 9 answers only)
**Outward and return flights and any transfers as one journey*



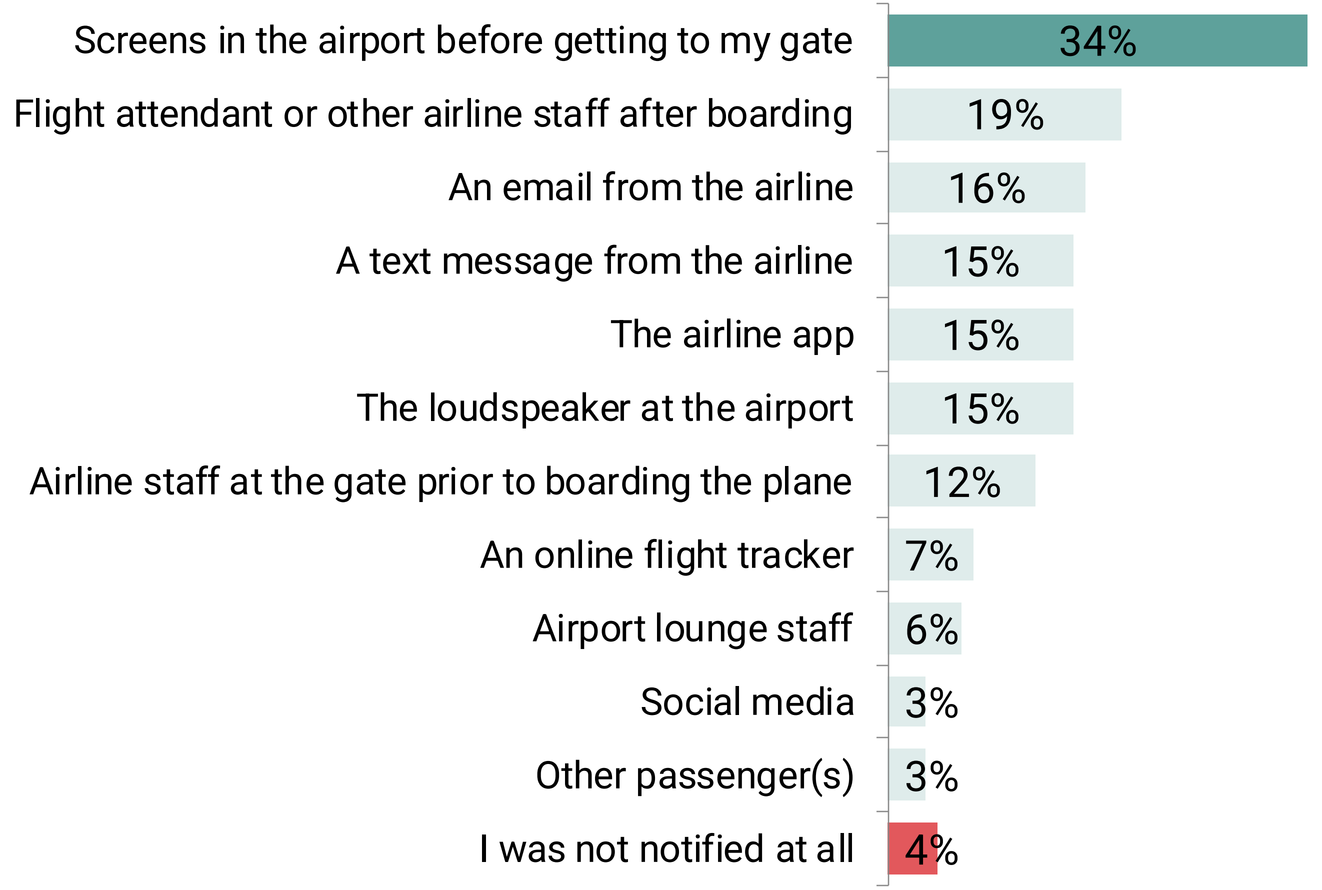
Q27. During your most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=2173).

Savanta

For those affected by flight delays or cancellations, screens near boarding gates were the main notification channel, with only a small number saying they were not notified at all

Notification channels for any flight delay / cancellations

Among those who have experienced a flight delay or cancellation in the last 12 months

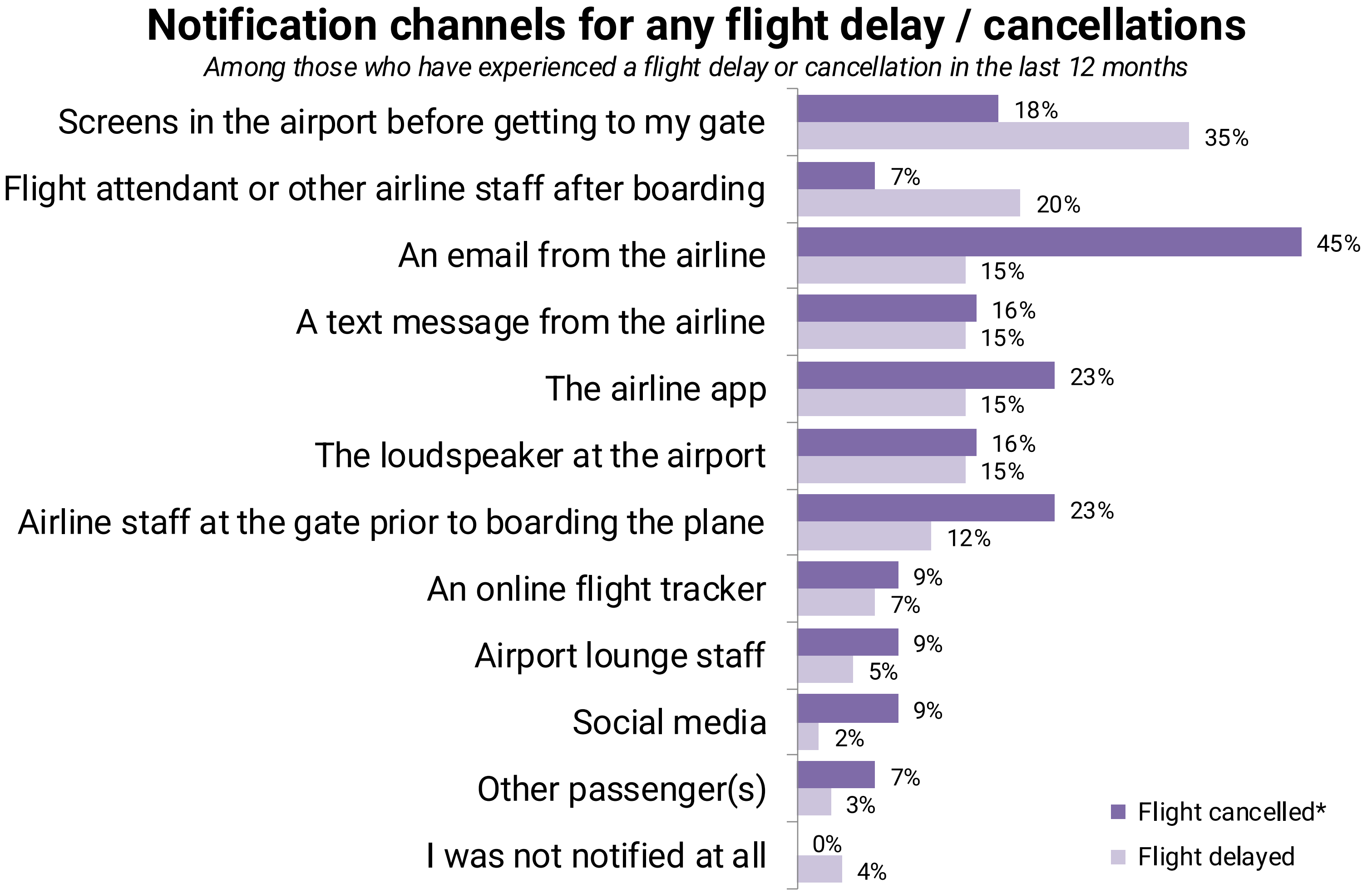


In 2025, the CAA commissioned research to better understand airline communication with passengers during disruption *. Savanta repeated this question from the research to provide another point of comparison.

The results captured by Savanta align with those of the previous CAA research: screens are the most common channel for notifying passengers about delays or cancellations (31% in the disruption research). Overall, passive notification channels—where passengers are informed by the airline or others—are more prevalent than active channels, where passengers themselves seek out information.

Q29NEW. How were you first notified about your flight delay / cancellation? Base: All who experienced a flight delay or cancellation (n=505). *Research mentioned in this slide: https://www.caa.co.uk/publication/download/25553

However, when looking at them separately, the primary channel for flight cancellations was email communication from the airline



The previous slide presented the most common channels used to notify passengers of delays and cancellations together. However, earlier CAA research indicates that notification channels often differ depending on the nature of the disruption.

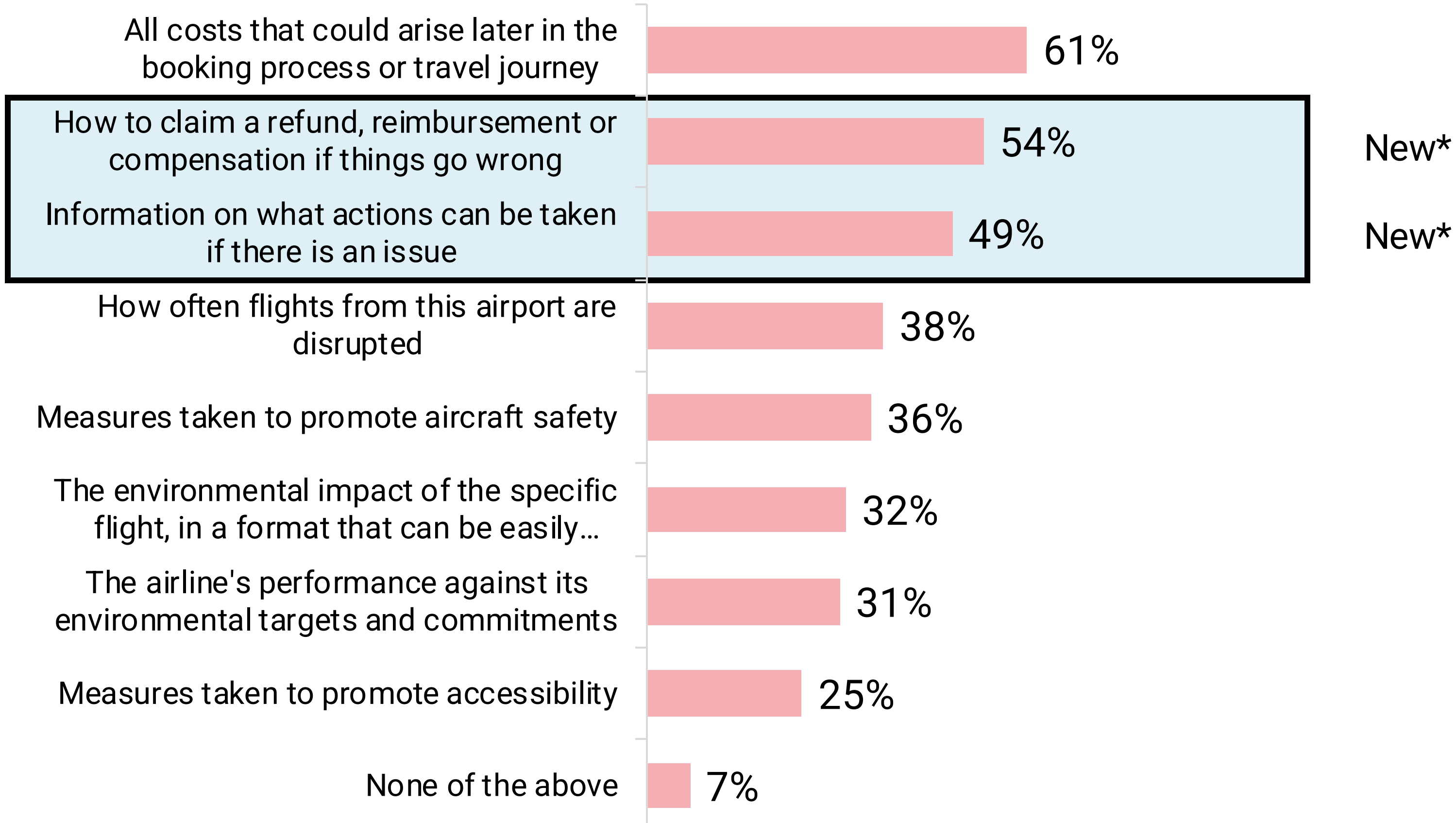
Examining the 2025 results separately, the trend continues: airport screens are the most common method for communicating delays, while cancellations are most frequently notified via email from the airport.

Q29NEW. How were you first notified about your flight delay / cancellation? Base: All who experienced a flight delay or cancellation (n=505), flight delays n=474, flight cancellation n=56* Small sample size, please treat with caution. Research mentioned in this slide: https://www.caa.co.uk/publication/download/25553

Savanta:

Consumers would like more information on actions to take in case of an issue and how to claim a refund, reimbursement, or compensation

Showing percentage of consumers who would like to see more information in the following areas at the point of booking a flight



After cost information (61%), consumers would like more information in two new options areas included this wave: how to claim a refund, reimbursement, or compensation if things go wrong (54%), and what actions can be taken if there is an issue (49%). This is similar to the proportion of flyers who report experiencing an issue in the last year (55%), as seen before.

Consumers aged 55+ are significantly more likely to want information on refunds and compensation (58%) as well as actions to be taken when there is an issue (54%).

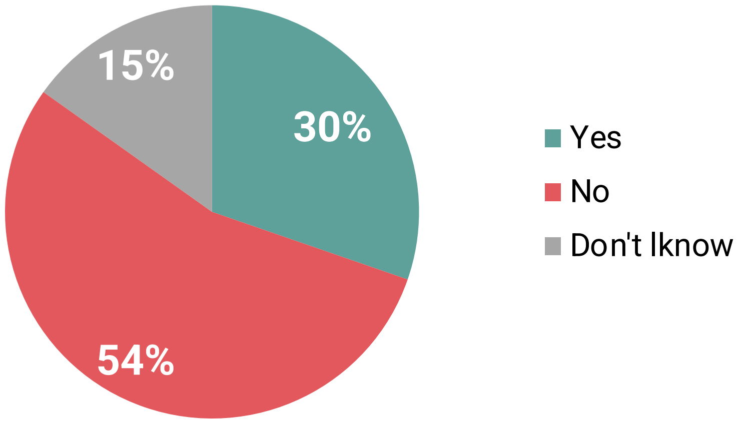
*Looking at the options tracked over time, a direct comparison to last year is not recommended since these two new options have been added this year. However, when excluding the new options, the order remains the same as in 2024.

Q10. In which of the following areas, if any, would you like to see more information at the point of booking? Note: respondents were able to choose multiple options here, so percentages add up to over 100%. Base: All who complained about a travel problem (n=174). Base: All respondents (n= 3500).

Over half of passengers who experienced a travel problem report they were not informed of their rights; this is especially pronounced among those with delayed flights. However, it cannot be determined whether all affected passengers had statutory rights, or if delays were sufficient for those rights to apply

Informed of their rights by airport or airline

Among those who experienced a travel problem



Three in ten (30%) of passengers say that they were informed of their rights when experiencing a travel problem (2024: 26%). This issue disproportionately affects older consumers, with only 11% saying they were informed, compared to 49% of 18-34 year-olds. No significant differences have been noted for other groups.

Consumers whose flights were cancelled are more likely to say that they were informed of their rights by the airport than those whose flight was delayed only.

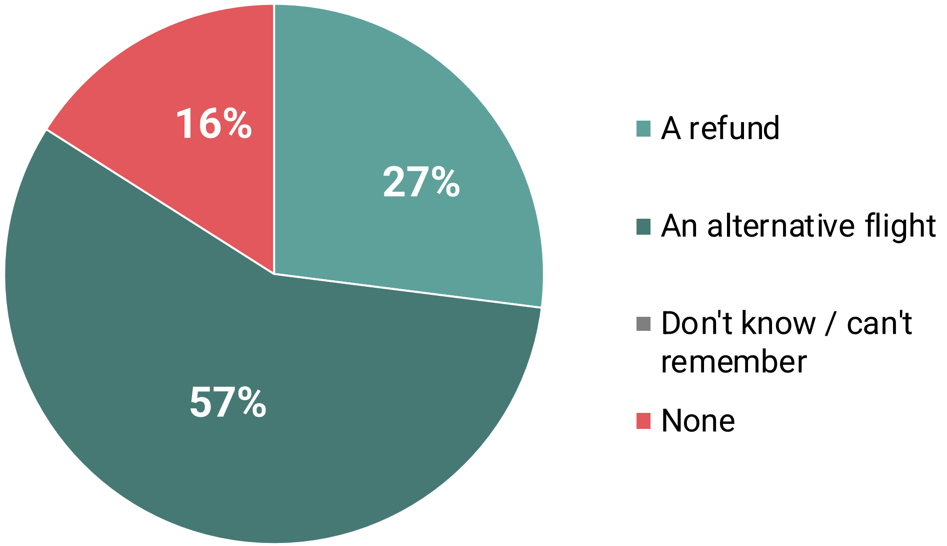
Informed of their rights? (Among those who experienced a travel problem)	**Flight delayed**	**Flight cancelled***
Yes	28%	**50%**
No	**59%**	36%

Note: Under UK law, eligibility for compensation or support when flights are disrupted depends on specific criteria such as the type of disruption, flight route, airline, length of delay, and reason for the disruption—so not all reported experiences qualify for statutory entitlements.

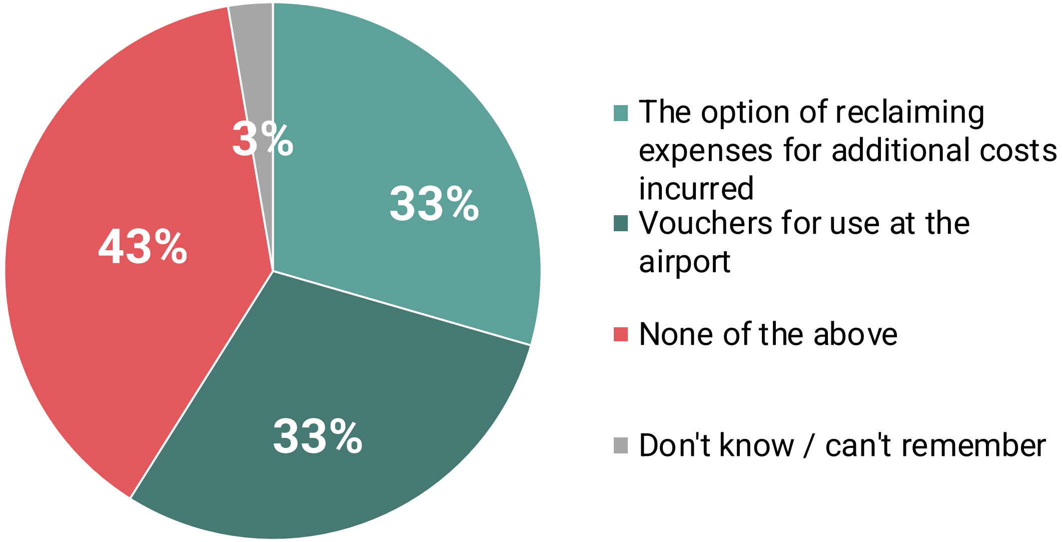
Q30. And were you informed of your rights by the airport or airline? BASE: All who experienced a travel problem (n=1186).), flight delays n=474, flight cancellation n=56*
Low base size, please treat with caution

Many affected passengers report missing out on support during travel disruptions, especially in cases of lengthy delays. However, these perceptions may reflect individual circumstances and may not always indicate eligibility for statutory support

Refund or alternative flight offered following cancellations
*All respondents who had to cancel their flight**



Care and assistance offered following delays
*All respondents who had a flight delay of more than 2 hours**



Note: Under UK law, eligibility for compensation or support when flights are disrupted depends on specific criteria such as the type of disruption, flight route, airline, length of delay, and reason for the disruption – so not all reported experiences qualify for statutory entitlements.

While an alternative flight is commonly reported to be offered across age groups, **older passengers (55+) are much less likely to report that they were offered a refund (17%) compared to those 18-34 (33%)*** Passengers in this age group are also less likely to report that they were informed of their rights, highlighting the need for more accessible information on when and what passengers are entitled to when experiencing travel issues and able to access their entitlements.

Q32. And when your flight was cancelled on your most recent journey, were you offered the choice of a refund or an alternative flight (either on the same or a different airline)? Base: All who experienced a flight cancellation (n=56*) Q33. When your flight was delayed on your most recent journey, were you provided with welfare, such as vouchers for use at the airport, or the option of reclaiming expenses for additional costs incurred? Base: All who experienced a flight delay of two hours or more (n=94*) *Low base size, please treat with caution

Understanding of key entitlement terminology is inconsistent, suggesting some confusion between the meanings of "refund", "compensation" and "reimbursement“, and when each applies in the context of air travel and disruption

	A refund	Compensation	Reimbursement	Don’t know
If my flight is delayed by **more than 5 hours** or cancelled and I decide not to fly, I can claim...	41%	28%	10%	21%
If my flight is delayed by **more than 3 hours** (and the airline is responsible) but I still decide to travel on that flight, I can claim...	14%	58%	11%	17%
If my flight is delayed and I have to pay for meals, accommodation, or transport, I can claim...	14%	33%	37%	16%

When presented with statements about ‘reimbursement’ for meals, accommodation, or transport due to delayed flights, 37% responded correctly.

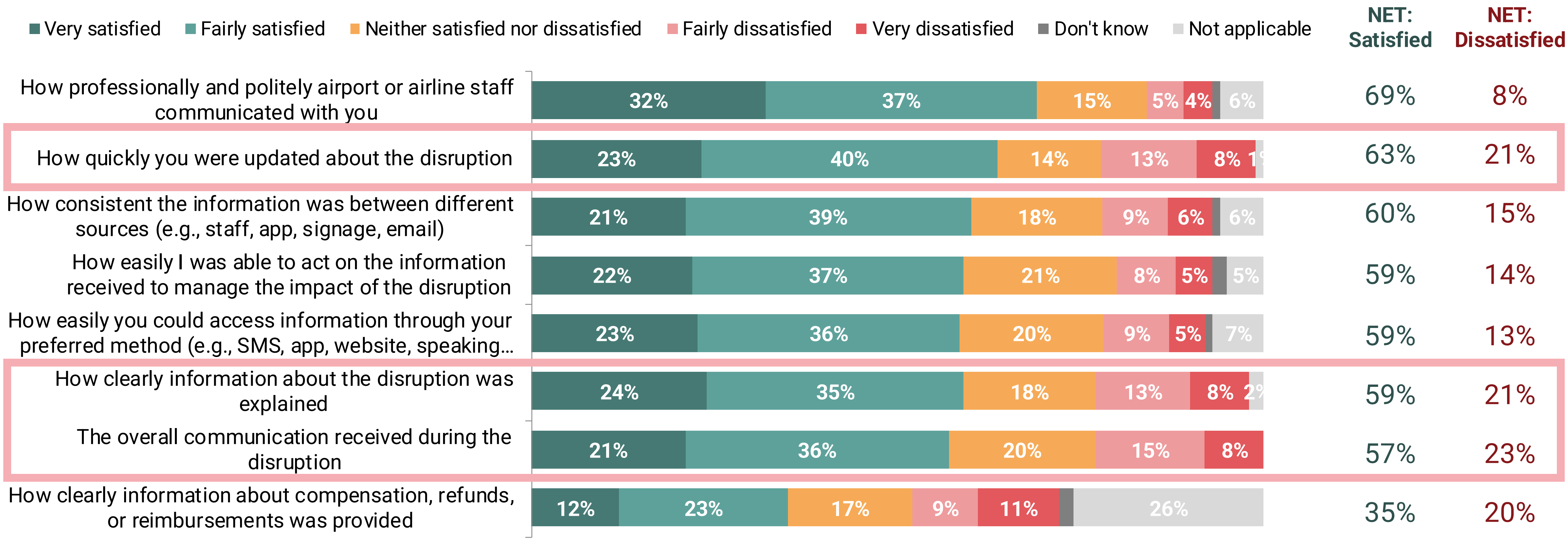
However, a similar proportion (33%) incorrectly associated ‘compensation’ with the scenario, highlighting passenger uncertainty over the terminology that defines passenger rights.

Q33b. In the context of air travel, passengers who have experienced delays often refer to: compensation, reimbursements and refunds. Please read each statement and choose the ONE term that best applies to your knowledge by ticking only one option for each Base: All who experienced a flight cancellation or delay (n=132)

When considering aspects of communication during travel disruption other than compensation, reimbursements, and refunds, passenger dissatisfaction is highest with the clarity and speed of information provided by airports and airlines

Satisfaction with different aspect of the communications received during travel disruption*

All who received communication about their delay / cancellation

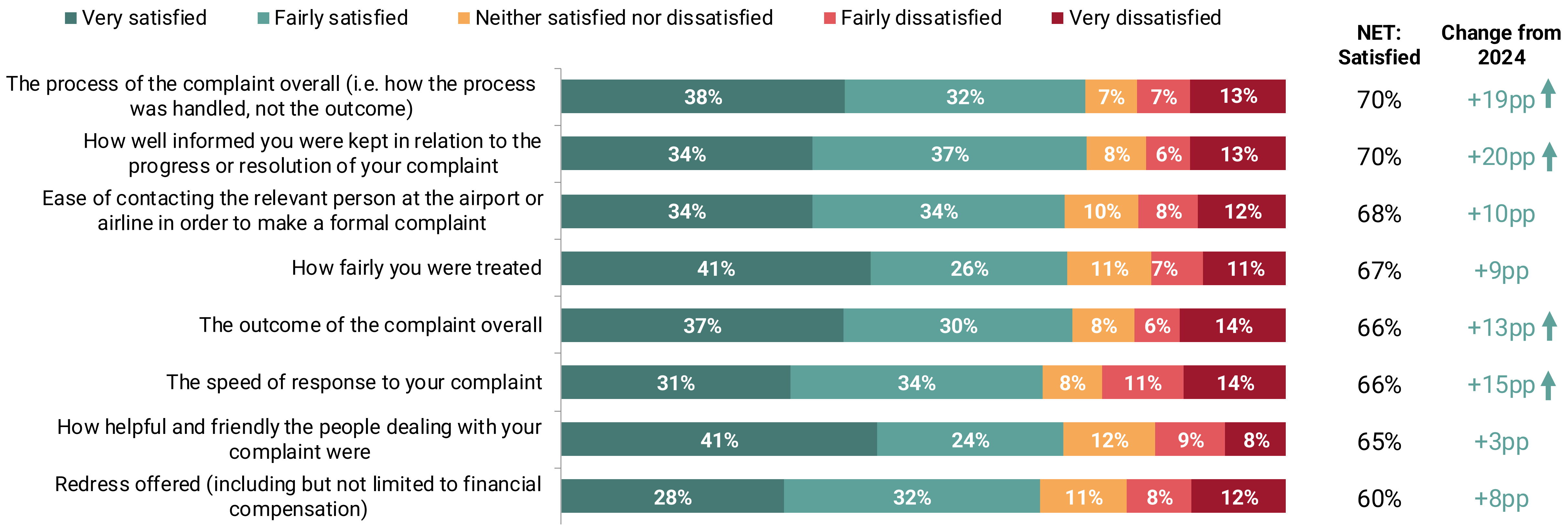


Q29b. For each of the following aspects of communication you received during your travel disruption, please indicate how satisfied you were. Base: All who received communication about their delay / cancellation (n=466). *New question for 2025

Although consumers reported shortcomings with communication during disruption, satisfaction with complaints handling after problems occur has risen

Satisfaction with specific aspects of complaints handling

All who have flown in the last 12 months, experienced a travel issue and complained, excluding 'Don't know' responses

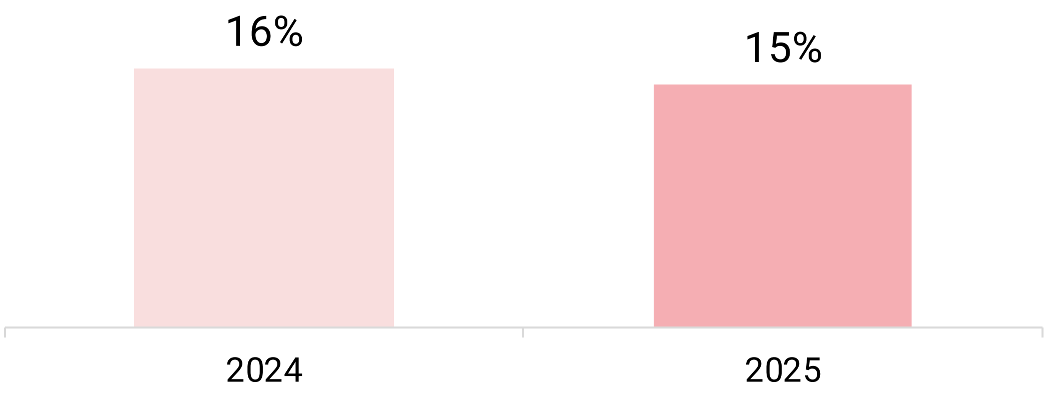


Q36. Thinking more specifically about any complaints you made about the travel issue, how satisfied or dissatisfied were you with each of the following aspects? Base: All who formally complained about a travel problem (n=166).

The prevalence of disruption related complaints is similar to last year, but satisfaction with how they are handled is considerably higher

Percentage of passengers who made a complaint following disruption

Among those who faced disruption on their most recent flight

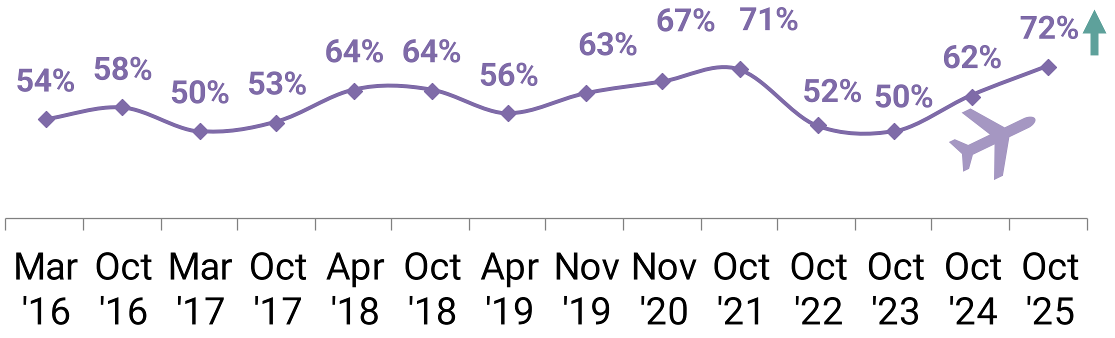


The proportion of passengers making a complaint after facing a travel issue on their most recent flight is similar to the previous year.

In line with last year, complaints were more common among those who experienced a cancellation or diversion (29%) than among those who experienced a delay (14%).

Showing percentage of passengers satisfied with complaints handling on their most recent trip

Among those who have flown in the last 12 months



Although complaints are still being submitted in similar numbers, satisfaction with how they are handled has notably improved in the last few years, with three quarters of consumers saying that they were satisfied with the process.

Those who experienced a cancellation or diversion (80%) are more likely to say they were satisfied with the complaint handling process than those who experienced a delay (63%).

Q34. Which, if any, of the following did you do during or after experiencing your flight issue? Base: All who faced a travel problem (n=1186).
Q23. How satisfied or dissatisfied were you with the handling of complaints? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=977).

However, some vulnerable groups are more likely to make complaints, share negative experiences with friends and family, or avoid using the same airline or airport in the future

Actions taken during or after experiencing travel problem by different lenses of passenger vulnerability

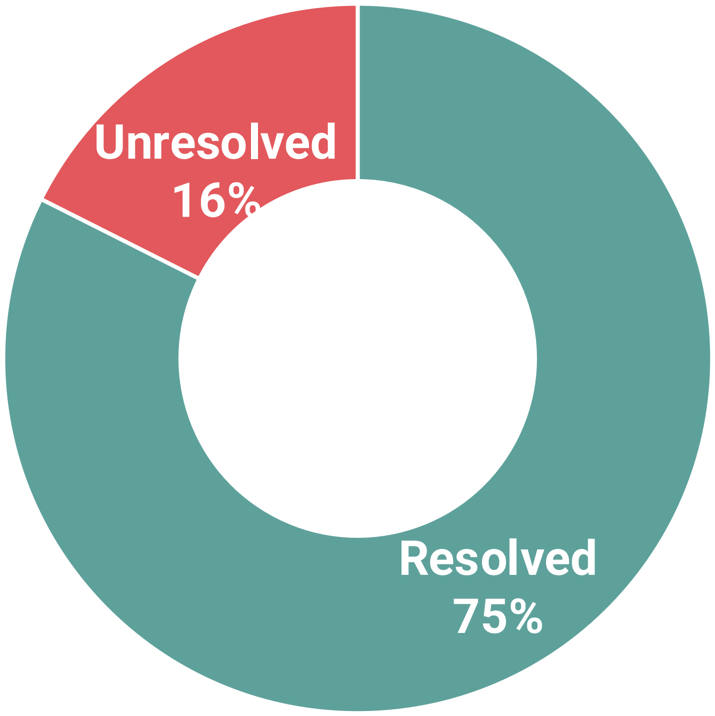
	Not vulnerable	Personal circumstances	Language / Communication	Digital	Accessibility and disability	Financial
Made a complaint	10%	22%	32%	16%	19%	14%
Made a claim for expenses incurred and / or compensation	7%	16%	33%	21%	20%	16%
Warned friends and / or family about flying with this airline / from this airport in the future	8%	15%	18%	15%	17%	15%
Decided to try and avoid flying with this airline / from this airport in the future	11%	12%	21%	13%	14%	14%

Q34. Which, if any, of the following did you do during or after experiencing your flight issue? Base: All who faced a travel problem (n=1186).

Three quarters of those who complained had their issue resolved, and six in ten consumers who raised a complaint say that it was resolved to their satisfaction

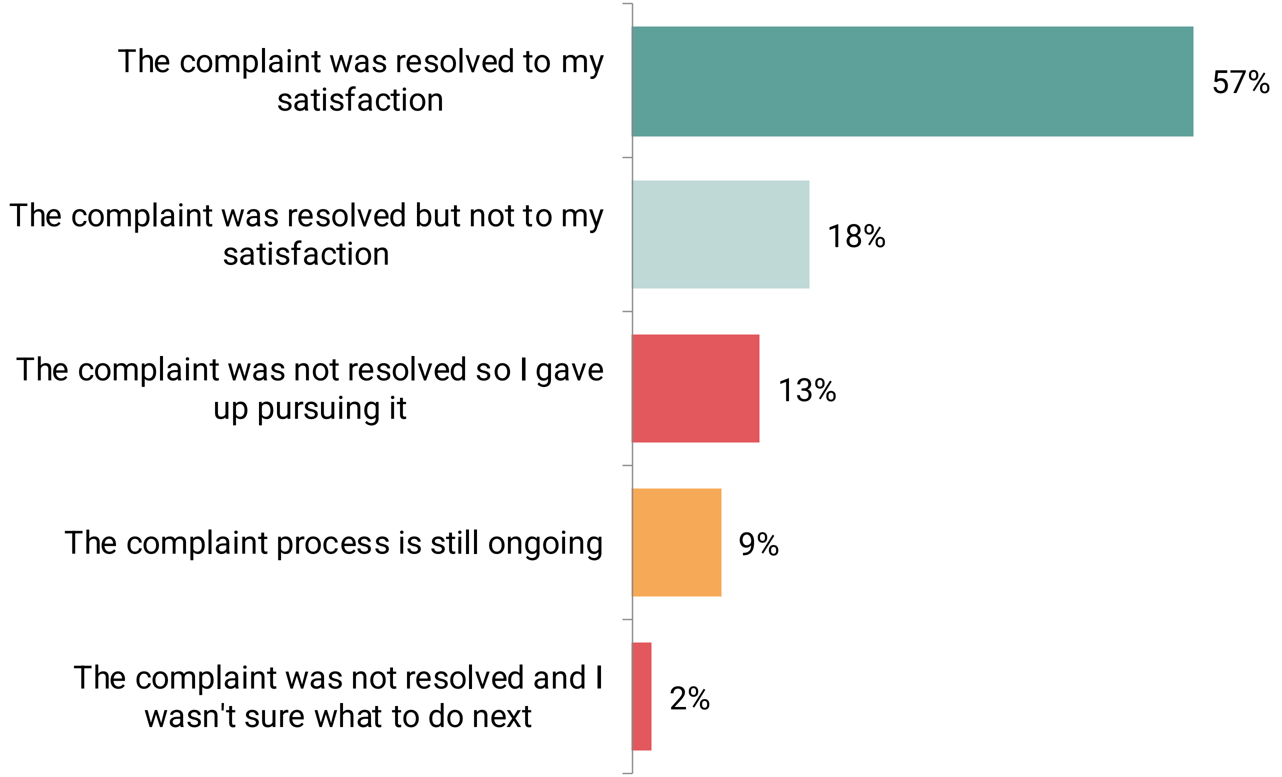
Outcome of complaint

All who complained about a travel problem



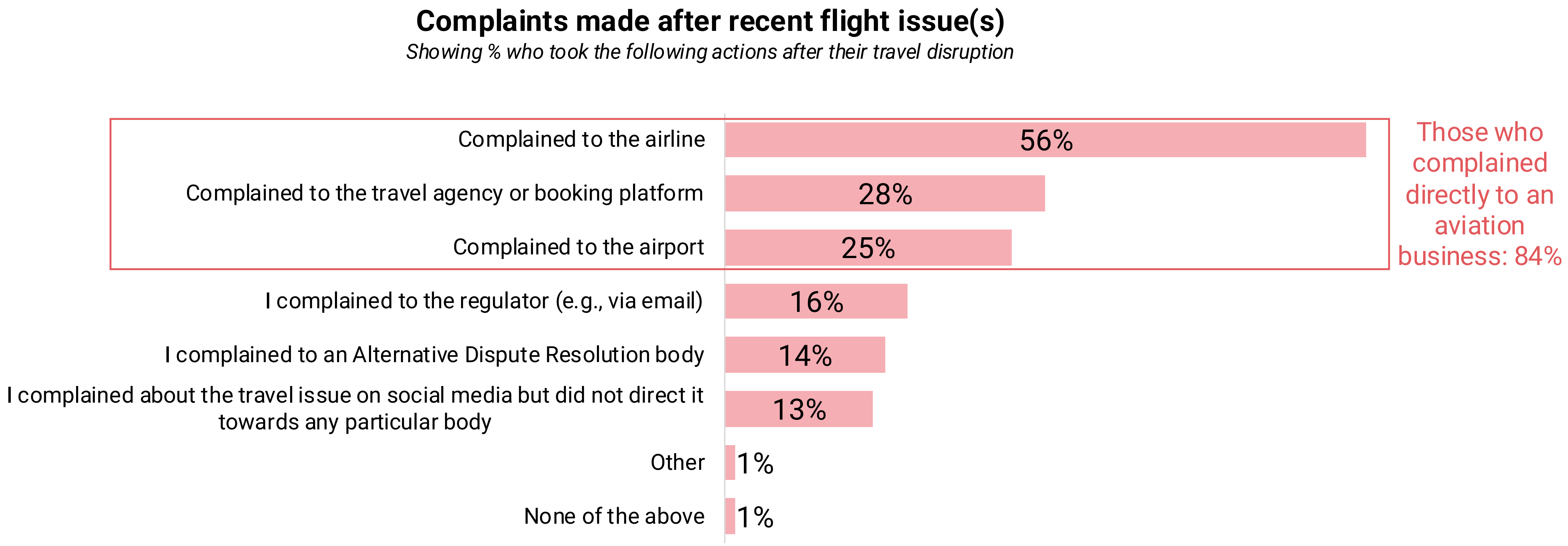
Outcome of complaint

All who complained about a travel problem



Q35b. What was the outcome of your complaint? Base: All who complained about a travel problem (n=174)

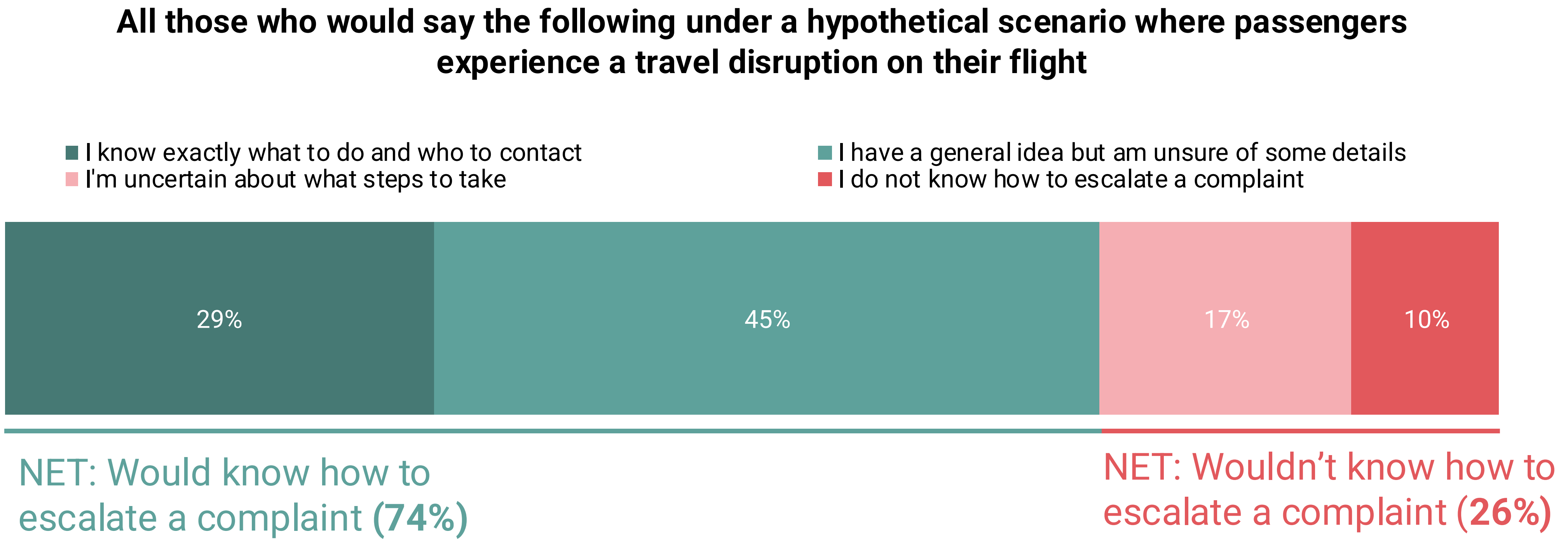
Over half of those that complained after a recent flight issue did so to the airline, suggesting they see their travel issue as the responsibility of the airline to handle



Only a small proportion of passengers direct their dissatisfaction with how their travel issue was handled by making a complaint. But of those that do complain, **most complain to the airline.**

Q35. Who did you make a complaint to? Note: respondents were able to choose multiple options here, so percentages add up to over 100%.
Base: All who complained about a travel problem (n=174)

Three quarters of passengers say they would know how to escalate a complaint, but this decreases to two thirds among those who have experienced delays in their last flight



*All figures in this report have been rounded to the nearest whole number. Further details can be found in the 'Methodology' section at the end of the report.

However, those who have experienced a flight delay (66%) are less likely to say this compared to those who have experienced a cancellation or diversion (83%), or no disruptions at all (81%). Similarly, older passengers are also less likely to say they know exactly what to do and who to contact to escalate a complaint (23%) compared to younger age groups (18-24: 36%)

Q34b. Suppose you experienced a travel disruption on your flight, made a complaint and were not satisfied with the response. How confident, if at all, are you in knowing how to escalate your complaint? Base: All who have flown in the last 12 months (n=2178)

Section 2.3:

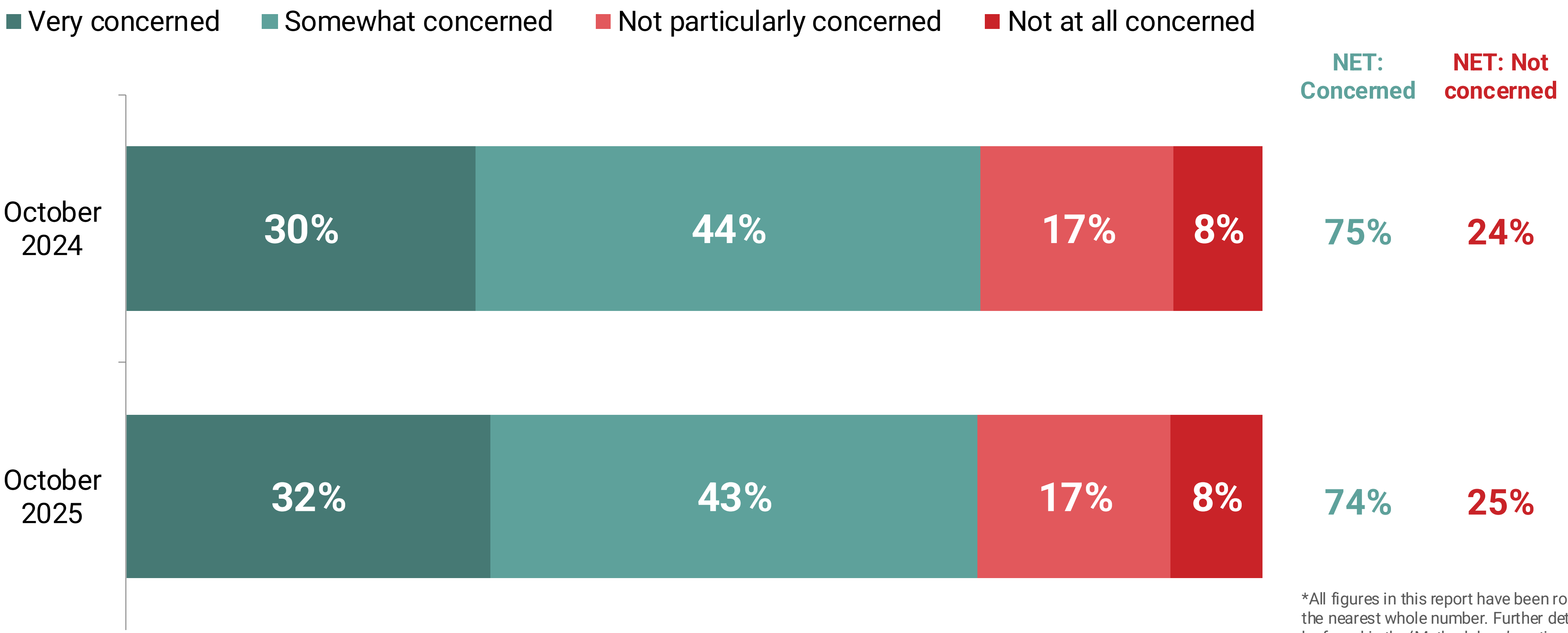
Aviation and the environment

Key takeaways from this section:

- Attitudes towards the environment are similar to those seen last year, with widespread concern about the environment, but relatively few consumers paying to offset the environmental impact of their flight.
- Around one third of consumers believe it is the airline's responsibility to cover the environmental impact of aviation; however, a quarter feel this cost should be built into the price of the ticket.
- As seen earlier, younger consumers are significantly more likely to fly than older age groups, and they are also more likely to claim they have paid to reduce the environmental impact of aviation on their last flight. However, the results indicate that the affordability of flying may be an even greater priority to them.

Similar to last year, three quarters of consumers say that they are concerned about the environment and climate change at present

Showing level of concern with the environment and climate at present



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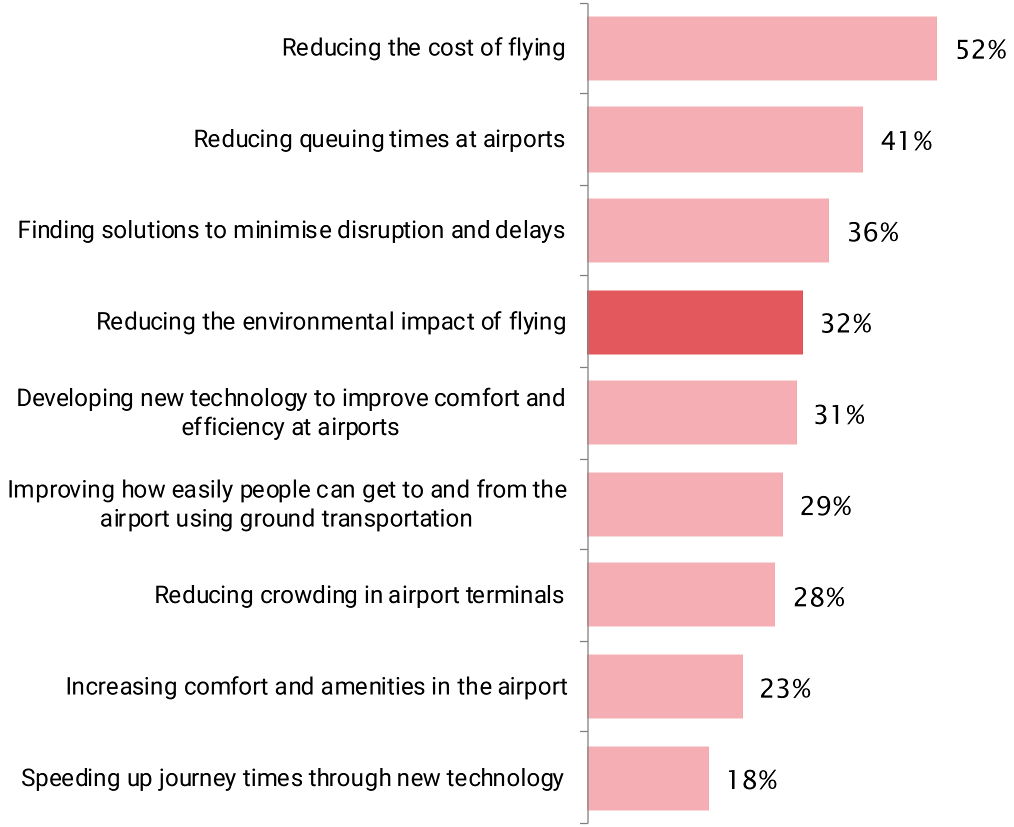
Q38. To what extent, are you concerned about the environment and climate change at present?
Base: All respondents (n=3500).

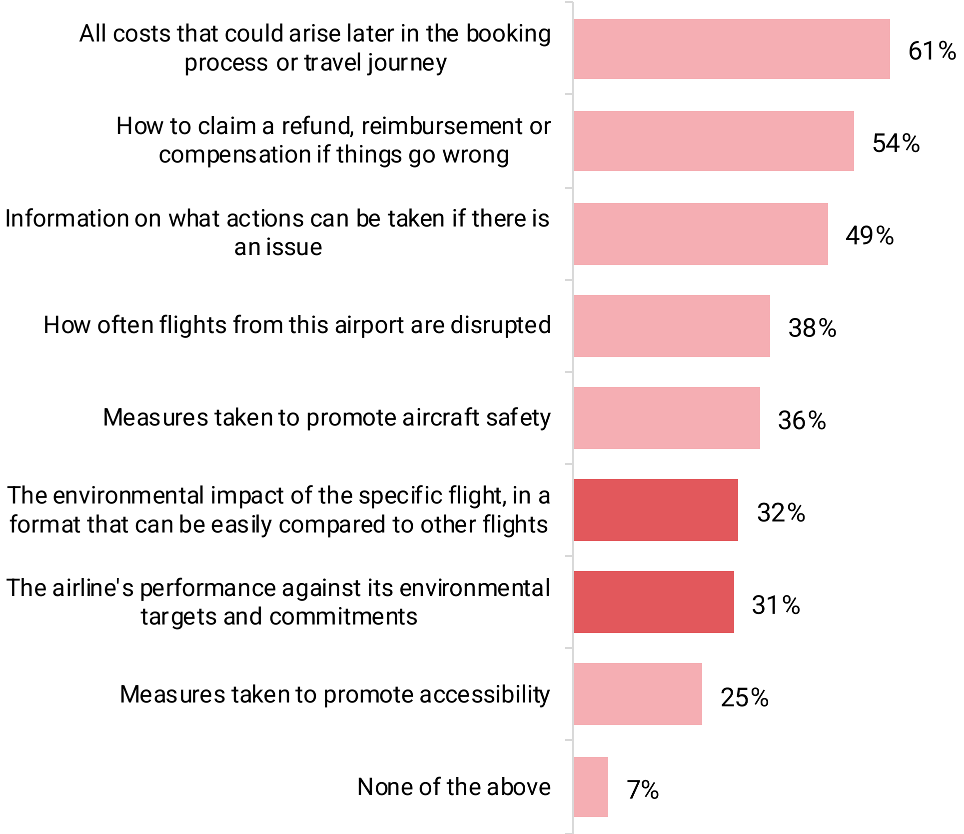
However, reducing the environmental impact of flying is assigned lower priority compared to reducing the cost of flying by consumers. The provision of environmental impact information at the point of booking is also regarded as a lower priority when compared to other information, such as costs or actions to take when issues arise

How UK consumers would prioritise areas for investment in the aviation industry over the next 12 months

Showing % who placed the following priority areas in their top 3



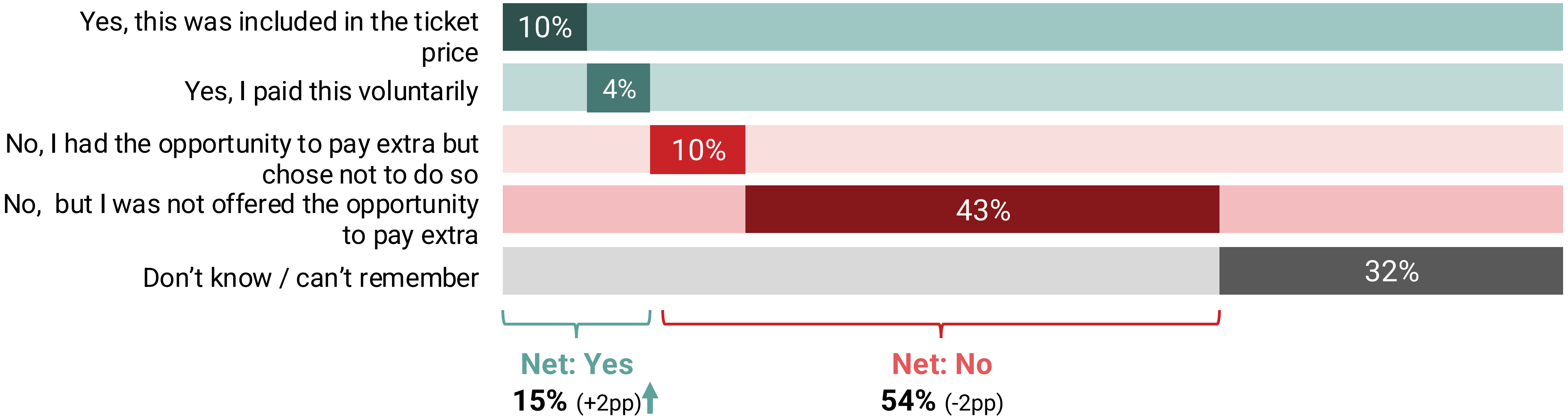
Showing percentage of consumers who would like to see more information in the following areas at the point of booking a flight



Q7. Consider this list of possible areas of investment for the aviation industry over the next 12 months. How would you prioritise these areas? Base: All respondents (n=3,500); Q10. In which of the following areas, if any, would you like to see more information at the point of booking? Base: All respondents (n= 3500).

A significant proportion of passengers claim they either weren't offered the option to offset the environmental impact of their most recent flight or do not remember

Showing the percentage of recent flyers who paid to reduce or offset the environmental impact of their most recent flight



Just 15% of consumers who have flown previously say that they have paid to reduce or offset the environmental impact of their most recent flight, a similar proportion as in 2024. It also continues to be the case that younger recent flyers (aged 18-34) are significantly more likely to pay to reduce or offset the environmental impact of their last flight (27%).
It is worth noting that older and digitally vulnerable consumers are significantly more likely to say that they are unsure whether they did this or not.

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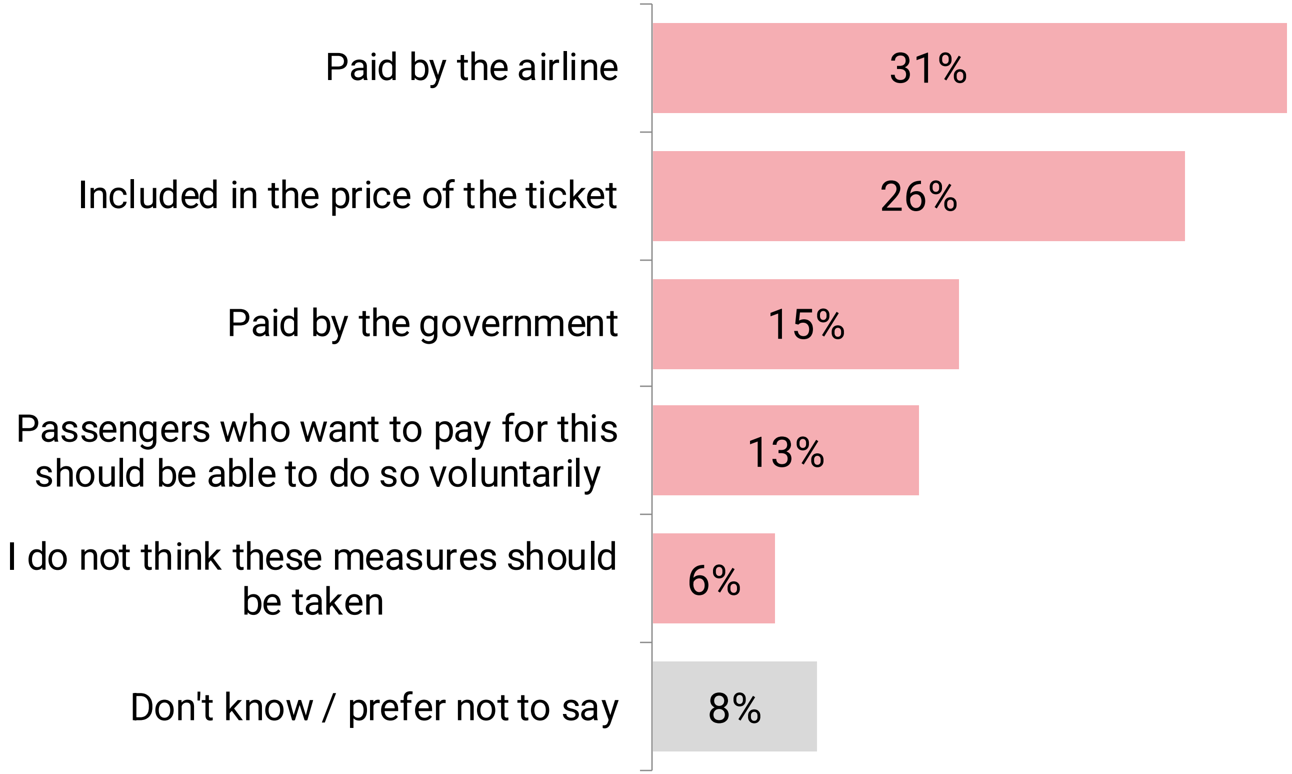
Q40. On your most recent flight, did you pay for reducing or offsetting the environmental impact of your flight?
Base: All who have flown previously (n=3370).

Consumers believe it should mainly be the airlines' responsibility to alleviate the impact of aviation on the environment

Covering the costs of environmental measures

Showing % who say the following should cover the cost of environmental measures to reduce the impact of flying



Consumers aged 55 and over are significantly more likely to think that environmental cost should be included in the ticket price (35%) compared to those aged 18-34 (19%) and those aged 35-54 (23%).

Younger passengers, on the other hand, are significantly more likely to think that the government should cover the costs of measures to reduce the environmental impact of flying. Consumers aged 18–34 are four times as likely as those aged 55+ to hold this view (28% vs. 7%).

Q39. Airlines can take various measures to reduce the environmental impact of flying. How do you think the cost of these measures should be covered?
Base: All respondents (n=3500).

Methodology

The Aviation Consumer Tracker is a quantitative survey of a nationally representative sample of 3,500 UK adults (18+). The full sample profile is detailed on the next page.

Fieldwork is predominantly conducted online, but an additional 500 consumers complete the survey via telephone interview (CATI), to ensure that consumers with limited digital access or capability are able to participate.

3,500 completes	3,000 online completes 500 phone completes	Fieldwork dates: 17th September to 20th October 2025

The research design, analysis and reporting is conducted by Savanta, an independent market research organisation.

As a member of the Market Research Society, Savanta conducts this research programme in strict accordance with the requirements of the international quality standard for market research.

Previous instalments of this research

From 2016 to 2019, the ACS was conducted twice per year. From the ninth instalment or 'wave' of the survey onwards (2020), the survey has been conducted once per year.

Most questions asked in the survey are repeated every wave, or every other wave. This provides a picture of how and why consumers attitudes are changing over time. The remaining, variable component of the survey enables the CAA to investigate emerging trends and explore specific questions in detail.

Previous ACS reports can be accessed here
(Clicking this button will take you to the CAA website)

Weighted sample profile

The core sample is recruited according to figures from the Office for National Statistics, in order to ensure that it is demographically representative of the UK by gender, age, region and working status. The entire sample (including phone boost) is then weighted by the same factors to correct any minor variations from the ONS figures. The weighted sample profile is as follows:

Gender

Male	48%
Female	51%

Age

18-24	25-34	35-44	45-54	55-64	65+
11%	17%	16%	16%	16%	23%

Working status

Working full time	45%
Working part time	15%
Not working (including, e.g., students and the retired)	38%

Region

East Midlands	7%	South West	9%
East of England	9%	West Midlands	9%
London	13%	Yorkshire and the Humber	8%
North East	4%	Northern Ireland	3%
North West	11%	Scotland	8%
South East	14%	Wales	5%

Note: All figures in this report have been rounded to the nearest whole number.

When the data is weighted, each respondent is assigned a weighting factor to adjust the contribution of different groups in a sample, ensuring that the final results are representative of the target population. This means that each individual respondent might count as, for example, 0.7 people or 1.5 people, depending on whether they have been weighted up or down.

This in turn means that the number of people selecting a particular answer can also not be a whole number, but for simplicity they are displayed as whole numbers in the charts and tables. Consequently, when adding up the number of responses displayed for each individual answer code, the total might differ by 1-2 from the total sample size. However, the figures are correct.

Contact details

If you have any questions about the presentation or the research more widely, please feel free to reach out directly to the Savanta team:

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