

Introduction

Long-awaited holidays. Make-or-break work trips. All-too-infrequent visits to loved ones. For these and many other precious, vital and rare moments in life, UK airports are essential waypoints as people go about their daily business.

UK airports welcome and wave farewell to more than quarter of a billion travellers each year.

The sector contributes at least £159bn of Gross Value Added (GVA)¹ to the national economy, with close to a million jobs supported directly and indirectly by airports.

The growth of technology used to support and enable the smooth running of airports is considerable. In every walk of life, increasing use of technology inevitably attracts online threats which seek to exploit, disrupt, steal and extort by breaching IT infrastructure. So far, despite the volume and value of the personal information they process on a daily basis, UK airports have proven extremely resilient to cyber-attacks.

But they're not invulnerable – in recent years there have been a number of data breaches and cyber attacks on UK airports. Thankfully the consequences haven't been terribly serious, so the impact on public perception of airports seems relatively unaffected.

Al has brought another series of questions to modern life. Should we ask machines to handle critical processes and extremely valuable data given the technology which drives them is still in such a nascent form?

One thing is for sure: UK passengers expect a premium service, minimal friction, world-class security and a seamless experience as they embark on or return from their travels. And they certainly expect airports to take good care of their personal information.

Working with an independent research partner, we've created this report to explore how UK travellers feel about the changing use of technology and the use of their personal data – and, crucially, what this means for airport operators.

The good news is that airports are already seen as trustworthy and secure. But the research raises important questions about data governance across the travel supply chain, passenger understanding and awareness of data security issues, and the role of developing technology in improving the airport experience.

Getronics Travel Trust Barometer 2025

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^{1.} https://steergroup.com/projects/steers-analysis-economic-importance-uk-airports

Exec summary

In 2023, 240.9 million² international travellers arrived in or left the UK by air – still shy of the pre-Covid levels of 297m in 2019, but a 23% increase on 2022 figures. Some 18 million³ people flew between UK airports during the same period. Digital technology played a role in each of these journeys. From automated baggage systems to app-based check-ins, the modern travel experience is powered by data and tech. But do passengers really understand where that data goes, how it's used, and who has access to it?



In 2023, 240.9 million international travellers arrived in or left the UK by air. A 23% increase on 2022 figures

The Travel Trust Barometer from Getronics explores the relationship between travellers' reliance on digital travel and their awareness and trust around personal data governance. Based on a nationally representative survey of UK air passengers, the report uncovers key trends in digital confidence, data discomfort, and what passengers expect from airport operators in a data-driven world.

The report findings go beyond general attitudes to uncover how different groups - by age, gender, region, and travel frequency - experience trust, control, and communication around travel data. From whether people read the fine print to how comfortable they feel with Al and facial recognition, the results reveal both a growing dependency on and acceptance of digital systems – as well as a deep undercurrent of unease.



² https://www.gov.uk/government/statistics/transport-statistics-great-britain-2024/transport-statistics-great-britain-2023-international-travel

³ https://www.gov.uk/government/statistics/transport-statistics-great-britain-2024/transport-statistics-great-britain-2023-domestic-travel

Confidence, convenience... and caution

Data security is a two-way street for airports, where the data subject (the traveller, in this instance) and the data controller (the airport) each bear practical, legal and ethical responsibilities. To that end, our research suggests that UK travellers have at least a notional sense of their part in this equation.

59%

59% of the people we asked said they were concerned about their data security when travelling.

70%

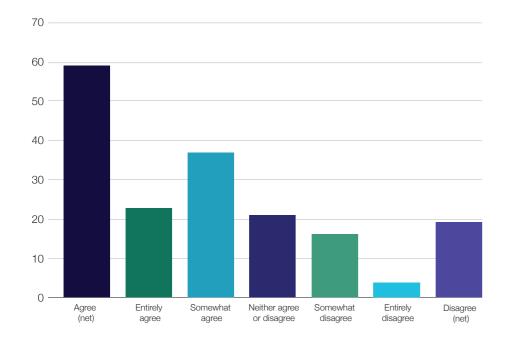
Perhaps surprisingly for a generation which has truly grown up with technology – or perhaps they're more tuned in to the intrinsic threats – those aged 25-34 are most concerned (70%).

44%

This rate falls steadily until we reach the 55+ age group, where only 44% say they are concerned.

What is less clear-cut from our research is whether this prompted awareness of data security translates to behaviours and decision-making.

Q1. How far do you agree or disagree with the statement: "I am concerned about the security of my personal data when travelling."



Regionally the picture is quite consistent, although London and West Midlands show greatest concern about their data security, at 67% and 65% respectively. Scotland is the most relaxed about the subject – while half (49%) of the country agrees their personal data is of concern during travelling, a further 29% say they're not concerned about the issue.



Unsurprisingly, credit card information is the area of most concern to travellers, with 40% saying they're most concerned about this information falling into the wrong hands. For just under a third (30%) of respondents, passport information is the main vulnerability on their minds.

While it's a small percentage, we were interested to note that more than one in 10 (12%) people said they did not feel vulnerable sharing any personal data when travelling. This bodes well for implementing technology in future, but it's important to remember the note of caution from the other responses.

One interesting point to surface from this question was the regional split. Every part of the UK was most concerned about credit card information, with the exception of Northern Ireland. Here the main worry was passport information, with 41% of respondents most concerned about this information compared to 32% who were most concerned about their credit card details.

What this suggests to us is that, while airports clearly must ensure operational good governance around all kinds of personal information, how this is communicated to the travelling public is also a crucial consideration.



The good news is that airports are among the most trusted organisations in the air travel industry. The vast majority (92%) of people trust airports with their personal data, with only eight per cent saying they don't. Only airlines themselves are slightly more trusted, with 94% of respondents feeling this way.

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It's worth noting the variation between different parts of the aviation supply chain, however. A third of people (32%) say they distrust baggage handling services with their personal data. This may be a conflation with personal experiences (or perceptions) of lost baggage, but in any event there's work to be done to ensure consistency across the whole passenger experience.



During our initial one-to-one conversations with travellers, frictionless and fast travel were the main measures by which airports are judged. This accords with the direction already being pursued by the sector, including the Doha Declaration on Facilitation of International Air Transport, announced in April 2025 with the intention of creating "a more efficient, inclusive and sustainable aviation system."

"I'm generally thinking about what's happening when I get off the plane – I assume airports are looking after my data but in all honesty it's not something I really think about. I want to know that I'll get to my destination in time, and that's about all I have time for."

Comment from one interviewee, who regularly flies domestically and internationally for work

Our survey responses largely bear this out. When asked to rank their top three priorities at the airport:

convenience and speed	EO 0/
	53%
	33 / 8
security overall (51%)	_
	- 5 %
	0 = 70
data security (36%)	
	36%

The disparity between speed and security of data is especially pronounced among older travellers. In the 55+ age group, speed and convenience was a priority for 62% whereas just 39% said data security was in their top three, along with overall security at 61%.

Other matters are clearly peripheral for this group – quality of food and drink options (18%), accessibility (20%) and friendliness of staff (20%) are considered far less important. At the other end of the age spectrum, the youngest group – 16-24-year-olds – similarly prioritise speed over everything else, albeit to a lesser extent (39%). Overall security is a close second (38%) with data security a priority for 26% of them. Perhaps predictably, good airport wifi was almost as important – 25% of this age group ranked it as a priority.

The regional picture contains some interesting discrepancies. Most parts of the UK considered speed and convenience to the top priority at the airport. Only a few ranked overall security slightly more highly – Greater London (50% for overall security vs 49% for speed), Scotland (55% vs 49%), South West England (53% vs 47%) and West Midlands (51% vs 48%).

Regional discrepancies - overall security v speed

Greater London South West

Overall security Speed Overall security Speed

% v 49% 53% v 47%

Scotland West Midlands

Overall security Speed Overall security Speed

5% v 49% 51% v 48%

Of all the UK regions, travellers in South West England attached most importance to data security, at 43%. Every region has the security of their personal information as the third top priority, but North East England is the least concerned about it – 29% selected this option has a priority.

And while the physical distance between them may be among the highest in the UK, Scots and Londoners like to travel on a full stomach more than any other part of the country. Food and drink options were prioritised by 32% and 31% respectively. Our data didn't delve into preference for 6am airport pints, however...

Technology clearly has a leading role in a fast, efficient airport experience – from new luggage scanning technology to self-check-in processes, it's clear that travellers are willing to accept technology and the use of personal data if it makes their lives easier.

However, this trade-off only works where passengers have confidence in the systems which allow a more stress-free experience and protect their data. Operational resilience is a matter of extreme importance for the smooth running of airports and the trust which passengers place in operators.



Data governance - who cares?

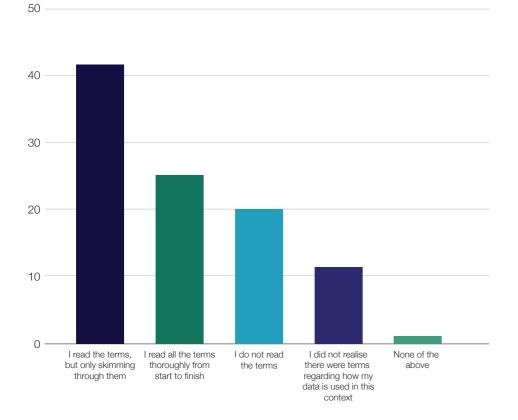
It's clear that data security is, notionally at least, on the minds of UK travellers. It may not be absolutely front of mind as suitcases are packed and boarding passes are downloaded. But there is an awareness of its importance and an understandable desire to secure important personal information.

So how does this actually translate into behaviours, preferences and actions?

During our one-to-one interviews with air passengers, a theme clearly emerged. There's an acceptance of the need to provide personal data to travel through airports, but this isn't absolute. There's a view that personal choice and control over individual information is perhaps being lost by necessity.

As one traveller told us: "I sort of accept that I have to provide my personal information – what choice do I have? It's just part of travelling by air. We're all so used to it now, you don't really think about it. I don't like that loss of control over where my personal information goes or how it's used, but I realise there's nothing I can do about it."

Q10. When booking travel arrangements which of the following options best applies to how you read the terms and conditions relating to how your data is used?



Despite this apparent discomfort, none of our interview subjects said they closely interrogated booking terms and conditions for information about how personal data would be used, stored or managed.

Across the UK, only one in four (25%) people said they read the T&Cs in full. Another 42% claim to skim read the terms, with another 20% saying they don't read them at all. Tellingly, more than one in 10 (12%) said they didn't even realise the T&Cs contained information about data security.

Terms & Conditions - passenger attitudes



Younger people appear to be more diligent than more mature travellers. Among 16-24-year-olds, a full third (33%) said they read the T&Cs in full, with another 27% skimming the small print. That said, this age group also had the lowest awareness of what the T&Cs might contain – almost a fifth (18%) said they didn't know the terms covered personal data use.

Those in the 25-34 age group are keenest to understand how their personal information will be used – 38% said they read the T&Cs in full, and 35% report casting an eye over the contents.

It's the 45-54 age group which appears to be most relaxed about data governance. While almost half (47%) say they skim T&Cs, only 14% read them closely, and another 25% don't read them at all – the least of any age group. The biggest skimmers are the 55+ age group. Around half (51%) say they skim the T&Cs, although a similar proportion (21%) to the 45-54-year-olds admit to not reading the terms.

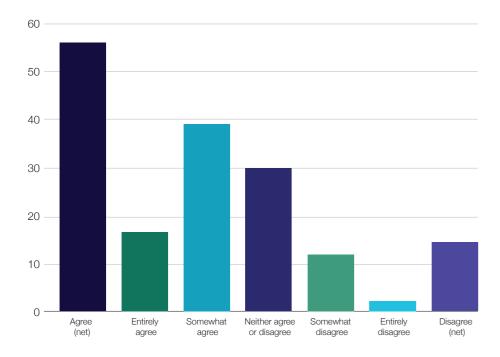
Regionally, Londoners pay most attention to T&Cs – 36% say they read the terms thoroughly. In Northern Ireland, 29% of respondents said they don't read the terms, the highest for any part of the UK.

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Q11. To what extent do you agree or disagree with the statement: "When booking my travel arrangements, I always feel in control of my personal data."



Fuzzy logic

If relatively few people are reading the T&Cs when booking air travel, we might expect them to have a fairly fuzzy view of the information airports hold about them and how it's used and shared. That doesn't seem to be the case.

In fact, two-thirds (66%) say they're confident they fully understand the information airports hold about them.

Those aged 25-34 are most confident (79%) which does follow the trend mentioned above for how closely this group delves into the detail of T&Cs. Older travellers, those in the 55+ age bracket, are split almost 50/50 on the question of confidence.

However, as our interviewee suggested, airports shouldn't take for granted passengers' willingness to share personal information for travel purposes. Almost a third (31%) said they felt uncomfortable about the personal information being held by airports.

This is especially true among those over the age of 45. More than a third (36%) said they felt uncomfortable with the data being held about them by airports. Interestingly, though, their youngest counterparts were slightly more uncomfortable – 40% of those aged 16-24 felt this way.

Importantly, a significant minority of people appear to have concerns about being in control of their personal information. Just over half (55%)

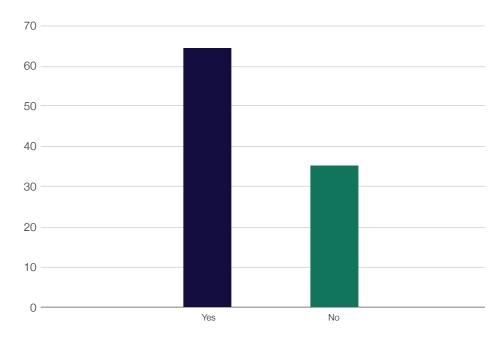
of respondents agreed that they feel in control of their personal data, and just 14% said they didn't. But 30% neither agreed or disagreed, which suggests to us they're not quite sure.

One thing we felt particularly worth noting was that, despite the overall feeling that people are generally comfortable with providing their data to airports, that doesn't necessarily mean they're happy about it.

Two-thirds (65%) of people believe that airports hold more information about them than is needed to allow them to travel. In reality this may not be the case. But simply the perception that airports hold more personal data than is necessary is a concern.

Ensuring that passengers understand what data is being held, why and for how long is likely to be a helpful way of maintaining what feels to us like a grudging trust, and perhaps turning it into something more positive.

Q16. Do you believe airports hold more information about you than they need to allow you to travel?



Putting the AI in airports

For the past several years, we've become more and more used to technology's role in airports – from the early days of online check-in to full-body scanners, security e-gates and the relatively recent luxury of leaving your laptop in your backpack.

Recent developments in the area of digital travel passes, whereby every aspect of your travel itinerary from flights to car hire are accessible via your phone, promise to simplify and streamline travel.

Is biometric security something the UK public is happy to accept as a growing part of the airport experience?

The public discourse around Al generally is often equal parts fascination and trepidation, so how does this translate to airports?

Is it all getting too much?

The answer seems to be 'it depends'. Where technology can be used to speed up the transit through the airport, our sense is that travellers are all for it. Interestingly, one concern raised by our interviewees was not the issue of security or a dystopian rise of the machines – but reliability.

"If technology is meant to make something quicker and more efficient, but it fails, that defeats the purpose," she said. "I've used passport scanners which don't recognise my older-style passport, so part of me just wants to go and show my passport to a person.

"I'm not worried about security, I'm worried that if we put everything in the hands of technology and computer says no, the whole thing will grind to a halt."

Another of our interviewees said faster transit through the airport would be welcome, but that Al shouldn't be used to augment retail, for example.

He said: "If AI makes it faster and safer to get through security, that's great. If I'm passing the bookshop and it recommends a magazine based on what it knows about me, I wouldn't like that. I want to retain my privacy."

This broad picture of cautious technology acceptance was replicated in our national survey. Two-thirds (66%) of people said they'd be comfortable with passport biometrics on their phones, and more than half of every age group concurred on this point. The over-55s were most uncertain, with a quarter (24%) saying they wouldn't feel comfortable with this, but almost the exact reverse was the case for 25-34-year-olds. Some 73% of this age group said they were comfortable with the idea.

"If AI makes it faster and safer to get through security, that's great. If I'm passing the bookshop and it recommends a magazine based on what it knows about me, I wouldn't like that. I want to retain my privacy all I have time for."

Frequent flyers – those who take more than 10 flights each year – were by far (90%) the most comfortable with passport biometrics; more than likely to help reduce the amount of time they spend moving through airports.

Al has already been accepted by many as part of how they expect airport technology to develop. Almost two thirds (62%) said they were comfortable about the increasing use of Al in airport processes – for example in security checks, check-in, boarding, retail and so on.



Still, almost one in five (17%) say they're not comfortable with this idea. That's not an insignificant proportion of the travelling public and underlines the need for airport operators to think carefully about how and where they introduce AI technology.

As you might expect, older travellers were less comfortable with the prospect of greater Al involvement in their airport experience. A quarter (25%) of over-55s feel this way, compared to the most Al-positive group, the 25-34-year-olds. Three-quarters (74%) of this age group feel comfortable about travelling with Al.

If we look at the broader message from this research, we can see a conditional willingness to accept ever-greater use of technology and personal data as part of the travel experience. The quid pro quo is that airport operators have to ensure a reliable and frictionless service as far as possible, recognising that significant numbers of people still feel at least somewhat hesitant to fully embrace technology.

All of this happens in the context of cyber incidents at UK airports having been relatively low impact and low profile thus far. That said, there have been numerous and regular examples of other major organisations from corporates to the NHS suffering significant IT security breaches. The issue is never far from the public realm. If – and perhaps when – we see an airport breach with widespread major impact, it's unlikely that passengers will stop flying for long. The convenience and speed of air travel is too

embedded in modern society. But as new technology develops, building and keeping public buy-in will be essential. To achieve this, reminding the travelling public of the robust processes and in-depth diligence which goes into creating a modern aviation industry needs to be an ongoing priority.

A question of trust

Trust is a key factor in the passenger/airport relationship. As should be clear by now, most of the travelling public generally feels like it can trust airports. This may be a de facto position born of necessity, but we'd argue that's largely academic in practical terms. Unless adverse circumstances give passengers cause to question this trust, airports have the opportunity to use tech to improve the overall travel experience and operational efficiency. Get this right, and that trust should grow.

But what about regional variations? We asked people the extent to which they entirely trust airports to keep their data secure, and then how they felt about their local airport's ability to do the same.

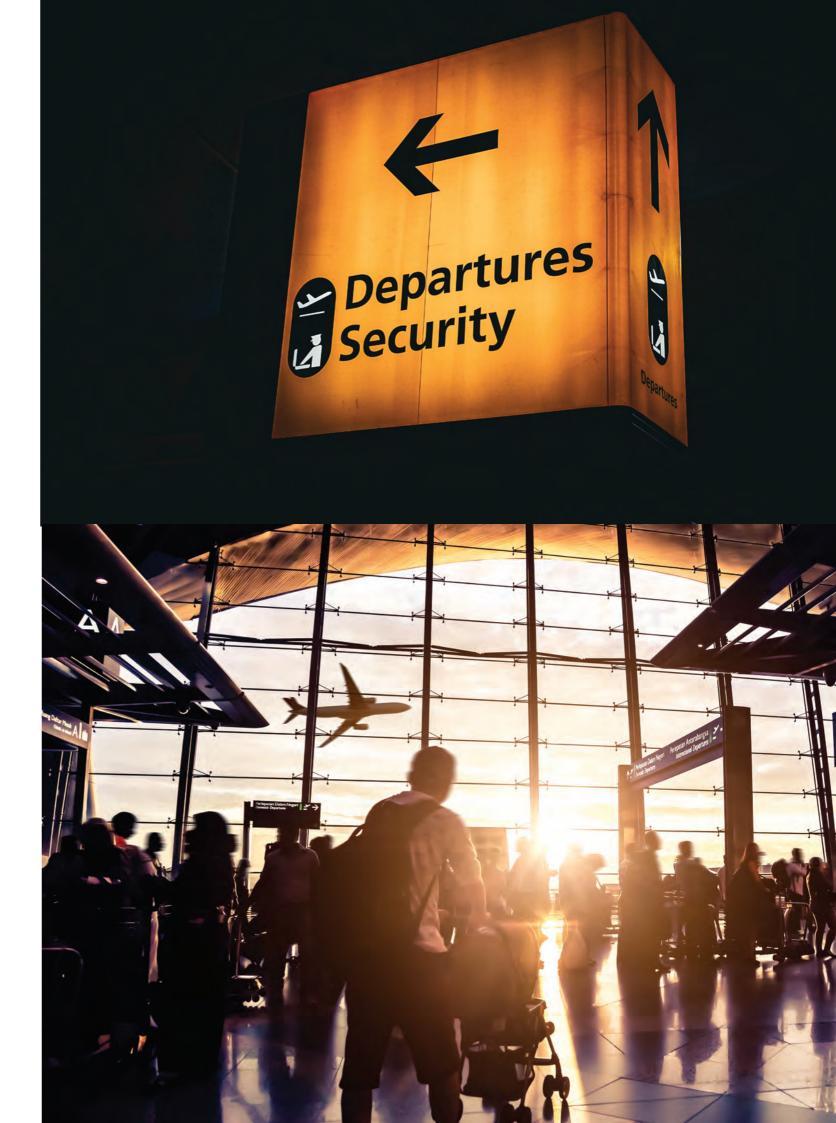
More than half (54%) said they agreed that airports as a whole could be trusted with their personal data security. If we dig a bit deeper, only 14% said they entirely agreed; 41% said they 'somewhat' agreed.

At the other end of the scale, almost one in five (18%) said they disagreed that airports could be trusted with personal data. Only three per cent said they entirely disagreed, with the remainder (15%) disagreeing somewhat.

The overall regional picture is broadly the same – 56% said they trusted their local airport specifically, with 17% saying they didn't.

The airports which scored highest for data security trust in the UK are Glasgow International – trusted by 68% of its regional passengers – London City (67%) and Heathrow (62%).







How vulnerable is the aviation sector to cyber attack?

Our research showed that two-thirds (65%) of travellers see airports as a significant target for data theft.

Rob Nidschelm, Global Head of Operational Security at Getronics, agrees this is an accurate assessment of the reality.

Rob said: "Airports are no longer just physical infrastructure, they are now complex digital ecosystems. As travel becomes increasingly paperless and biometric-based, driven by convenience and a demand for improved customer experience, the cybersecurity attack surface is expanding at rapid pace.

"Our own threat intelligence continues to highlight a persistent rise in targeted attacks on aviation, particularly on passenger data systems, biometric platforms, and third-party integrations critical to airport operations. This isn't theoretical: we've seen ransomware groups and state-linked actors specifically probing airport defences across Europe.

As travel becomes increasingly paperless and biometric-based, driven by convenience and a demand for improved customer experience, the cybersecurity attack surface is expanding at rapid pace.

"The corollary of a growing push to a digital paperless experience is increased value to hackers of sensitive data. Trust in digital travel relies on trust in the security behind it. The aviation sector must treat cybersecurity not as a compliance checkbox but as a continuous operational priority."

Conclusion: What this means for airport operators

Specific modes of travel are always a means to an end, but there's something about airports which promise adventure, growth, and the ability to connect with people over long distances which no other options can easily match. Yet consumer demand for cheaper, more convenient flying options have driven commoditisation in many parts of the industry. Flying's luxurious, privileged halcyon days are largely gone, save for those travellers who can afford to pay top dollar for enhanced accommodation.

But the world is changing. Technology plays a growing role in everyone's lives and it's easy to take this for granted. For airports, it's important to heed the note of caution sounded by this research. While air passengers, by and large, trust airports to keep them and their data safe, this trust is conditional.

Many people feel they're losing control of their data when travelling by air, which means it's incumbent on airports to prioritise communication and transparency in relation to how data is used.

The travelling public is by no means one-size-fits-all. Older travellers are naturally warier of the growing influence of tech, while simultaneously welcoming the speed and convenience it can bring. Even younger people, perhaps because technology has played such a key role in their lives to date, have their reservations about the extent to which their personal data is stored and shared as they head for the airport.

And while T&Cs might clearly spell out how personal data is used, it's important to be realistic. Quite honestly we have our doubts when a quarter of people say they read their data privacy T&Cs in detail – we'd be surprised if this many people even listen to the in-flight safety briefing. The fact remains, though, that individuals understand the importance of data security, even if they don't spend too much time thinking about it themselves. Airports will have to find a way of engaging people with their data, because it's the airports which will be held accountable in the event of a breach or other data privacy incident.

It's no coincidence that airports are already more focused on customer service than ever before. The competitive landscape is such that creating a first-rate travel experience for passengers is a commercial imperative.

That inevitably means technology will play a leading role in how this experience is delivered. Making it feel like an improvement, rather than a reductive move intended only to prioritise efficiency, is an important balance for airports to strike.

Innovations like new security scanners which remove the requirement to empty hand luggage, for example, reduce the stress of moving through security. Biometrics and AI could create an even smoother airport experience.

As our research shows, however, not everyone is enthusiastic about sharing more of their journey with technology systems.

Communication and dialogue, tailored to different groups of passengers, will be the difference between a positive experience and persistent distrust of how personal data is being used.

Technology holds many of the answers for the future of modern air travel. With smart, considered communication, a more digitally-integrated travel experience will be felt and accepted by the people who matter most – your passengers.

The final call

- Data privacy has high stakes but low engagement there's an urgent need for clearer, more accessible communication around data use.
- Inclusivity matters travellers are a diverse group of ages, backgrounds and viewpoints. Airports have to think about how to engage them in what the future looks like.
- Trust is fragile while airports enjoy relatively high levels of trust by default, there's a clear opportunity to strengthen it through transparency, choice, and digital literacy.

Methodology

Quantitative research was conducted by Censuswide, among a sample of 2,000 UK residents who had flown in the last 12 months. The data was collected between 2nd April - 6th May 2025. Censuswide abides by and employs members of the Market Research Society and follows the MRS code of conduct and ESOMAR principles. Censuswide is also a member of the British Polling Council.

Qualitative research was undertaken by Getronics, with in-depth 1-1 interviews held with 10 UK residents who have flown at least once in the last 12 months.