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Research on the air- passenger experience at Heathrow, Gatwick, Stansted and Manchester airports

Submitted to

CAA

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1 Executive summary

1.1 Introduction and methodology

The Civil Aviation Authority (CAA) is the UK's independent specialist aviation regulator. As part of its remit, the CAA wanted to explore how the air-travel market is working for passengers. Following a report in November 2007 on the passenger experience at Heathrow Airport, the Department for Transport (DfT) published further reports on Stansted, Manchester and Luton airports. Alongside this work, the CAA was asked to provide advice on key areas, including:

- early lessons from the opening of Terminal 5 at Heathrow
- runway resilience at Gatwick and Heathrow
- improving the 'through airport' passenger experience.

This research contributes to the last of these areas and the CAA has focused its research on the 'through airport' passenger experience at the largest UK airports by passenger numbers: Heathrow, Gatwick, Stansted and Manchester. The findings of the research will also feed into the CAA's review of its approach to consumer policy in relation to service provided by airport operators and airlines, covering:

- service expectations
- the ticket-buying experience
- the departure experience
- the in-flight experience
- the arrival experience
- the overall travel experience
- complaints handling.

In total, 1619 interviews were conducted between August and September 2008. The overall data is accurate to +/- 2.4% at the 95% confidence interval. This means that if 50% of respondents are satisfied with their travel experience, we know that between 47.6% and 52.4% of all air passengers at the four airports hold this view.

1.2 Service expectations

Respondents generally expected the same standard of service at the airport regardless of how much they paid for their ticket (87%) although they accepted that the in-flight level of service would at least partly be determined by the price of their ticket. Indeed,

74% expected a higher level of service if they paid more for their ticket and 71% thought service standards would be lower when travelling on a no-frills or budget airline.

Respondents felt the maximum waiting times for passport control, security and check-in should be less than 20 minutes; and many of them stated it should be under 10 minutes (particularly for passport control). Business customers were less willing than leisure customers to wait at passport control (84% vs. 63%),¹ security (57% vs. 38%) or check-in/fast bag drop (58% vs. 30%). Importantly, those who were flying with a no-frills airline were no more willing to accept longer waiting times than those flying with a full-service airline.

1.3 Buying the ticket

Slightly more than half the respondents bought their tickets on airline websites (54%); 15% bought them from other travel websites; 10% at a travel agent's office and 9% over the phone from a travel agent. Two-thirds of the flights were paid for by the respondents; 22% by the company/employer; and 10% by someone else.

Slightly more than half (53%) of respondents shopped around before deciding on their flight, but 45% did not.

- International fliers were more likely than domestic customers to have shopped around (54% vs. 45%).
- Furthermore, those who were on a long-haul flight were more likely than those on short haul to have shopped around (60% vs. 50%).
- Finally, those who had booked their flight through a website were more likely to have shopped around than those who booked by phone or by another method (59% vs. 45% and 36%, respectively).

Most respondents felt that the location of the airport (70%), flight times (70%) and ticket price (62%) were major factors in their choice of flights. The price of their ticket was a major factor in the decision-making process for 73% of the 16–34 year olds; this was significantly higher than for any of the other age groups (35-44, 60%; 45-60, 61%; 61+, 57%). Respondents who flew with a no-frills airline were less likely than either charter or full-service airline passengers to view airline service quality as a major factor in their decision (22% vs. 34% and 41%, respectively).

Although ticket price was a factor in most people's decisions, it was often not the over-riding factor. In fact, only 39% of respondents bought the cheapest ticket available, 49%

¹ All figures given are the percentage who expect to wait 10 minutes or less.

did not and 12% did not know. Possibly as a result of the predominance of no-frills/budget airlines flying from Stansted, passengers from this airport were the most likely to have bought the cheapest flight available (54%).

Although respondents felt that ease of understanding the final price (83%), understanding the cost of additional options (73%), buying tickets (85%) and value for money of flights were all good (76%), they were less positive that it was easy to compare the different airline options (52%) or service quality (35%).

Regression analysis was used to focus on the aspects of buying a ticket that have the greatest impact on the passenger's overall experience. This statistical analysis found that the key drivers were the ease of understanding the final price and the perceived value for money of the flight.

1.4 Departing from the airport

Slightly less than two-thirds of respondents (62%) checked in at the airport check-in desk but a sizeable minority checked in either through the airline's website (27%) or through a self-service kiosk (9%).

Eighty-seven percent of respondents checked in their bags within 20 minutes. This compares favourably with the 73% who thought they should wait for a maximum of 20 minutes so it appears respondents' minimum expectations for time taken to check in are largely being met. Heathrow Airport respondents were more likely than any other airport's respondents to have to wait less than 5 minutes (60% vs. 50%). Seventy-seven percent of those who travelled with a full-service airline queued for less than 10 minutes compared with just 34% on charter flights.

Most respondents waited at security no longer than 10 minutes (74%) and, again, this compares favourably with the minimum standards expected (44% expected to wait a maximum of 10 minutes). However, those who travelled through Stansted Airport were least likely to have waited for less than 10 minutes (63% vs. all others, 78%).

There was high awareness of the restrictions on what air passengers were allowed to take on board. Around nine in ten respondents knew the weight restriction of hand baggage (89%), restriction on carriage of liquids (97%) and luggage allowed on board (94%).

Satisfaction with the various aspects of departure was generally high but there was lower satisfaction among respondents who had used Stansted Airport.

Most respondents found that their experience when departing from the airport was at least as they expected, if not better than they expected (91%).

- Respondents who had flown from Heathrow were more likely to have had an experience that exceeded expectations (48%; Gatwick, 32%; Manchester, 25%; Stansted, 28%).
- Passengers of a full-service airline were more likely than no-frills or charter passengers to have had a better-than-expected experience (37% vs. 28% and 29%, respectively).

In total, 67% of respondents experienced no delays; 17% were delayed on departure and arrival; 11% delayed on departure only; and 3% had a delayed arrival only. Stansted Airport respondents were more likely than Heathrow or Gatwick respondents to have experienced no delays (72% vs. 63% and 64%). Similarly, no-frills airline passengers were more likely than charter airline respondents to have experienced no delays (71% vs. 60%).

Respondents whose flight departed or arrived on time were more likely than delayed passengers to report that their departure experience was better than expected (depart on time, 35%; depart late, 27%; arrive on time, 35%; arrive late, 24%). These groups of respondents were also more likely to be satisfied with their overall pre-departure experience (depart on time, 80%; depart late, 69%; arrive on time, 80%; arrive late, 66%).

Most respondents found out that their flight was delayed either while waiting for their boarding announcement (42%) or when actually on the plane (41%). Respondents who found out that their flight was going to be delayed when they were on the plane were more satisfied than those who found out while they were waiting for a boarding announcement.

Key driver analysis found that the key drivers of satisfaction with the departures experience were ease and time getting from the boarding gate onto the plane; the information provided on flight times and departure gates (including information about changes or delays); cleanliness and maintenance of airport facilities; and the ease of getting around the airport. Encouragingly, all these areas recorded high levels of satisfaction, and therefore airports should focus on keeping satisfaction levels high in these areas. Importantly, areas that had relatively low levels of satisfaction, ie the amount of seating at the airport and the availability and helpfulness of staff were not as important drivers of satisfaction.

1.5 In-flight experience

Most respondents were satisfied with the cabin crew, the condition and cleanliness of the cabin, the in-flight temperature, the plane's toilets and, importantly, their overall in-flight experience.

Aspects deemed by respondents to have the greatest impact on their overall in-flight satisfaction were the comfort of their seat (74%),² the amount of personal space (71%), the condition and cleanliness of the interior (71%), the in-flight air temperature (70%) and the way the cabin crew handled any requests or problems (67%). In general, those who had been on a long-haul flight were more likely to consider that aspects of their in-flight service had a major impact on their overall experience. Similarly, those who flew with a full-service airline were more likely than those who used a no-frills airline to consider those issues important.

Ninety percent of respondents felt that their in-flight experience was at least as good, if not better, than expected. Four-fifths of respondents (80%) stated that they were likely to recommend their airline to a friend; and only 8% said they were unlikely. Unsurprisingly, respondents whose flight had departed or arrived on time were more likely than those who had experienced delays to recommend their airline (departure on time: 83%, departure late: 74%; arrival on time: 82%, arrival late, 71%). Similarly, respondents who had a positive experience of buying the ticket, departing from the airport or in-flight experience were all more likely to recommend their airline than those who had had a negative experience (buying: 83% vs. 58%; pre-departure: 84% vs. 64%; in-flight: 87% vs. 35%).

Key driver analysis found that the key drivers of satisfaction with the in-flight experience were satisfaction with the welcome and presence of the cabin crew and the condition and cleanliness of the cabin interior. Importantly for overall satisfaction, both these areas are performing relatively well. Furthermore, the two aspects with the worst relative satisfaction, namely ability to sleep and quality of refreshments, were not areas with a high impact on overall satisfaction.

1.6 Arrivals experience

About half of respondents (53%) departed their aircraft via an airbridge, 33% by aircraft steps and 9% had to get a bus to the terminal.

Ninety percent of respondents who travelled through international arrivals waited for less than 20 minutes at immigration; this compared with 91% who had stated earlier that the maximum length of time they were prepared to wait (at passport control) was 20 minutes.

Three-quarters (75%) of respondents who checked-in their luggage had to wait less than 20 minutes to receive it.

² All figures quoted are the percentage of respondents who rated it 4 or 5 out of 5 for impact.

- Passengers of no-frills airlines were more likely than those who flew with a full-service airline to receive their luggage within 20 minutes (82% vs. 75%).

1.7 Overall opinion of travel

Four-fifths of respondents (80%) would recommend the airport they used to a friend based on their experience; only 6% would not.

- Respondents who had used Stansted or Manchester airports were more likely than those who had used Heathrow Airport to say that they would recommend it to a friend (84% and 82% vs. 74%)³.
- Those who were flying for leisure purposes were more likely than those flying for business to recommend their airport (82% vs. 74%).
- Those with a positive pre-departure experience were more likely than those with a negative experience to recommend the airport (87% vs. 55%). Similarly, those with a positive arrivals experience were more likely than those with a negative experience to recommend the airport (87% vs. 52%).

1.8 Accessibility of flight

The five percent of respondents travelling with anyone who needed assistance because of a disability were asked how satisfied they were with the assistance given both at the airport and once on board their flight. Encouragingly, most were satisfied with the assistance at both the airport (77%) and when on board the airline (89%).

1.9 Previous experiences of flights

Two-thirds of respondents have not experienced any problems with their flights in the past three years; however, 23% have had a problem at the airport, 14% on their flight and 5% with buying a ticket. Most of those who reported that they had a problem viewed it as either very serious or fairly serious, particularly problems experienced buying a ticket or at the airport.

The different locations of problems seemed to make little difference as to whether the person went on to make a complaint; between 49% and 51% of those with a problem went on to make a complaint and it was generally made to the airline. Most problems (between 58% and 70%) were experienced by respondents travelling with a full-service airline.

³ 79% of respondents who used Gatwick Airport would recommend it to a friend, this was not significantly different from any of the other airports.



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Respondents were roughly split in half between those who knew their rights as an air passenger (53%) and those who did not (47%). The Air Transport Users Council (AUC) is the UK's consumer council for air travellers, but less than a quarter of respondents have heard of it.

2 Introduction and methodology

2.1 Background

The Civil Aviation Authority (CAA) is the UK's independent specialist aviation regulator. Its responsibilities include:

- economic and safety regulation
- airspace policy
- consumer protection.

As part of its remit, the CAA wants to explore how the air-travel market is working for passengers. The air passenger experience has been a prominent topic on the news agenda over the past year – most notably in connection with the opening of Heathrow Terminal 5. Following a report in November 2007 on the passenger experience at Heathrow Airport, the Department for Transport (DfT) published further reports on Stansted, Manchester and Luton airports. Alongside this work, the CAA was asked to provide advice on key areas, including:

- early lessons from the opening of Terminal 5 at Heathrow
- runway resilience at Gatwick and Heathrow
- improving the 'through airport' passenger experience.

This research contributes to the last of these areas alongside other work that the CAA has commissioned in relation to its current consumer policy.

2.2 Methodology

The survey was conducted in compliance with ISO 20252, the internationally recognised standard for market research.

The research was undertaken using a computer-assisted telephone interview. The questionnaire was devised by the CAA with assistance from ORC International and included the following topics:

- service expectations
- the ticket-buying experience
- the departure experience

- the in-flight experience
- the arrivals experience
- the overall travel experience
- previous experience of air travel
- complaints about air travel

The following numbers of interviews were completed against the target quota.

<u>Quota</u>	<u>Quota</u>		<u>Achieved</u>	
	<u>%</u>	<u>No</u>	<u>%</u>	<u>No</u>
<u>Journey purpose</u>				
<i>Leisure</i>	70	1120	72	1164
<i>Business</i>	30	480	28	455
<u>Airport recruited at</u>				
<i>Heathrow</i>	25	400	23	371
<i>Gatwick</i>	25	400	25	401
<i>Stansted</i>	25	400	25	401
<i>Manchester</i>	25	400	28	446
<u>Journey destination</u>				
<i>Domestic</i>	30	480	15	240
<i>International</i>	70	1120	85	1379
<u>Airline</u>				
<i>No frills</i>	40	640	37	596
<i>Charter</i>	20	320	12	195
<i>Full service</i>	40	640	51	828
<u>Journey length</u>				
<i>Short haul</i>	70	1120	71	1153
<i>Long haul</i>	30	480	29	468
<u>Travel class</u>				
<i>Business / first class/ premium economy</i>	20	320	10	167
<i>Economy</i>	80	1280	90	1452

In total, 1619 interviews were conducted between August and September 2008. The overall data is accurate to +/- 2.4% at the 95% confidence interval. This means that if 50% of respondents are satisfied with their travel experience, we know that between 47.6% and 52.4% of all air passengers at the four airports hold this view.

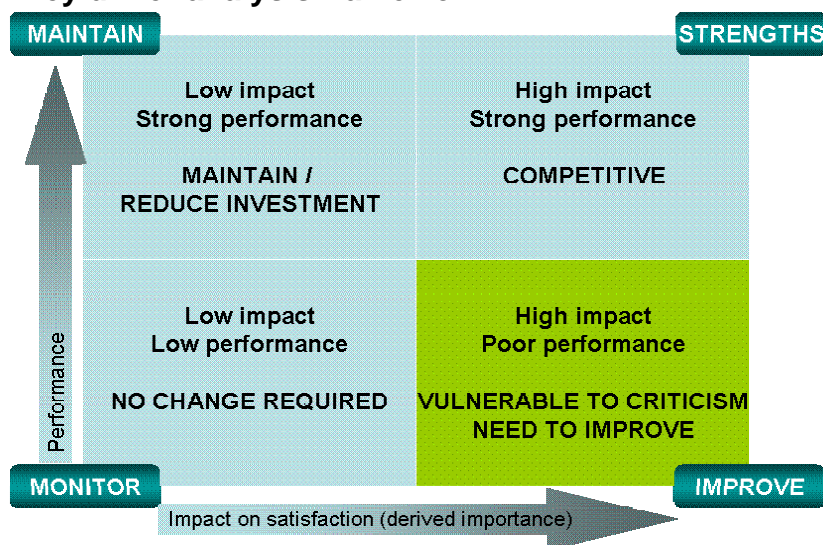
2.3 Key driver analysis

It is often assumed that to improve levels of satisfaction, organisations should target their areas of lowest satisfaction. In reality, research has shown that the greatest gains in overall satisfaction are made by improving the areas that customers value most highly. Where weaknesses are concentrated in areas of service that are not especially important to customers, focusing heavily on them can waste time and money.

Key driver analysis is used to measure the impact of individual factors on a single overall score. It identifies which individual elements of the client journey have the most influence on overall customer satisfaction, advocacy or loyalty. Rather than asking respondents directly how important individual elements are to them, the analysis infers importance by identifying the elements that contribute to satisfaction. It thus provides a genuine measure of impact rather than that stated by respondents, which can often ignore elements that act at a less conscious or rational level.

By identifying the relative importance of factors, key driver analysis assists in prioritising performance improvements. The areas that have a high impact on customer satisfaction and are not performing well should be priorities for action (see Figure 1 below). This enables a framework of priorities to be set to provide a realistic and achievable set of actions for performance improvement.

Figure 1: Key driver analysis framework



Key driver analysis was carried out on ticket-buying, departure and in-flight experiences.

2.4 Data Handling

This report is based on unweighted data.

Only statistically significant differences between sub-groups have been reported in this report.

Where percentages do not add up to 100, this may be due to computer rounding, or multiple questions. Throughout the report an asterisk (*) denotes any value more than zero but less than 0.5%.

3 Profile of respondents

This section of the report details the profile of the respondents interviewed.

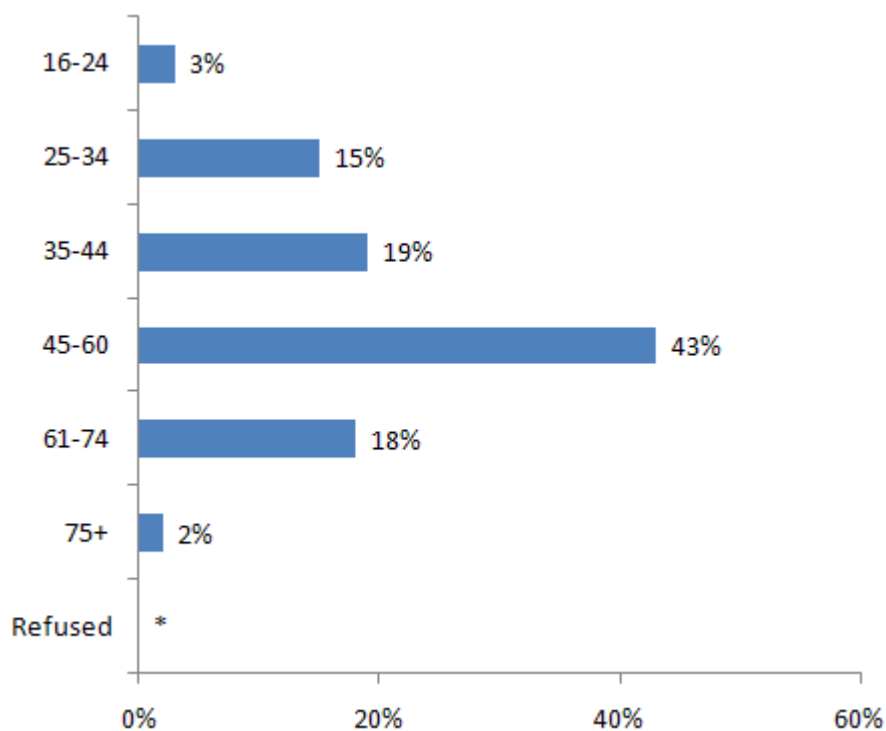
3.1 Gender of respondents

Fifty-four percent of respondents were male and 46% were female.

3.2 Age of respondents

Most respondents were aged 45 and over (62%).

Figure 3.1 Age of respondents (%)

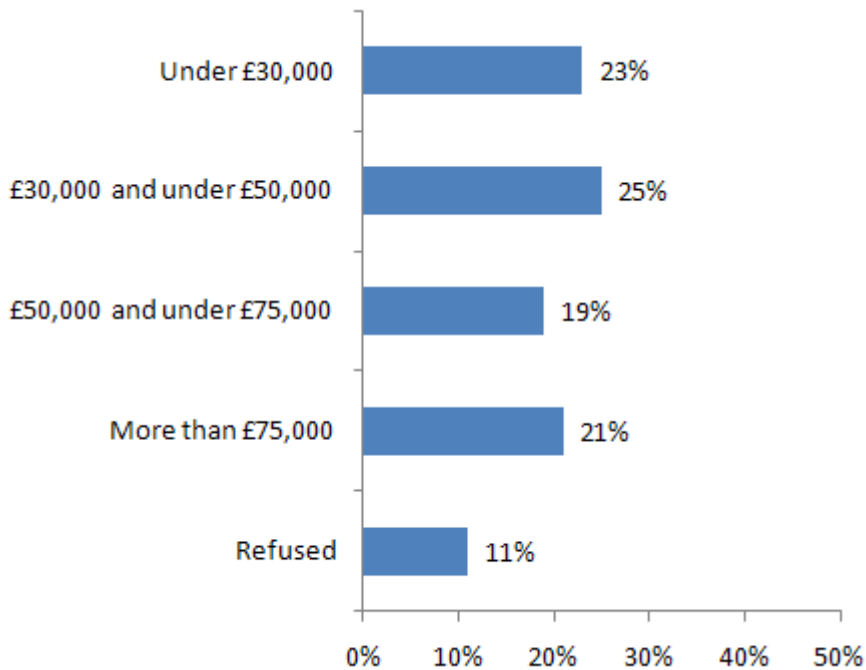


Base: all respondents (1619)

3.3 Household income

There was a roughly equal spread of respondents across the income brackets.

Figure 3.2 Household income



Base: all respondents (1619)

3.4 Ethnicity

Most respondents were White British (84%), White Irish (2%) or from another White background (8%).

3.5 Travelling with children

Ninety-one percent of respondents had been travelling without children; 9% were travelling with children (2% with infants under 2, 5% with child(ren) 2–12yrs and 4% with child(ren) 12yrs+).

4 Service expectations

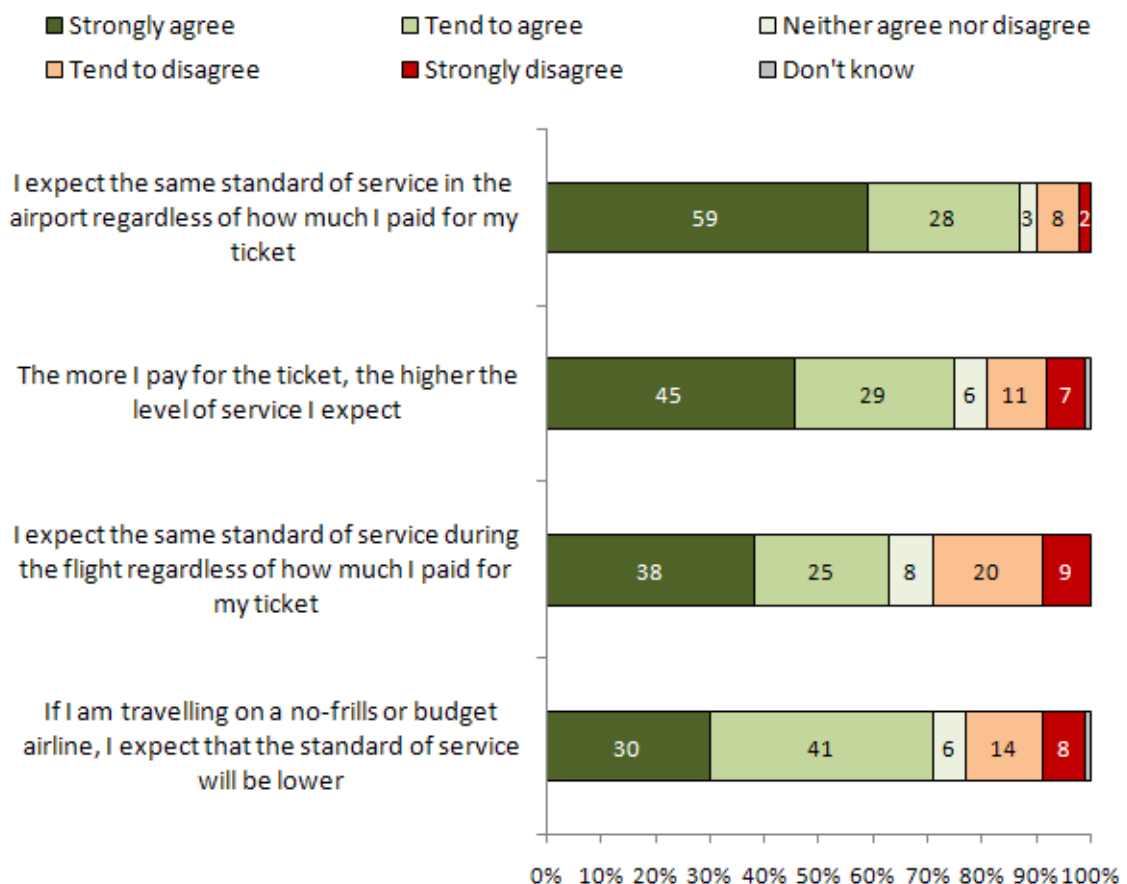
This section of the report analyses respondents' responses to questions about their expectations of service quality.

4.1 Service expectations based on flight cost

First, respondents were asked about how the cost of their flight influenced their service expectations. Respondents generally expected the same standard of service at the airport regardless of how much they paid for their ticket (87%) but accepted that the service from the airline would at least partly be determined by the price of their ticket. Indeed, 74% expected a higher level of service if they paid more for their ticket, and 71% thought service standards would be lower when travelling on a no-frills or budget airline.

However, there were mixed views on whether they expected the same standard of *in-flight* service regardless of the cost of their flight (63% agreed, but 29% disagreed).

Figure 4.1 Service expectations influenced by price of ticket



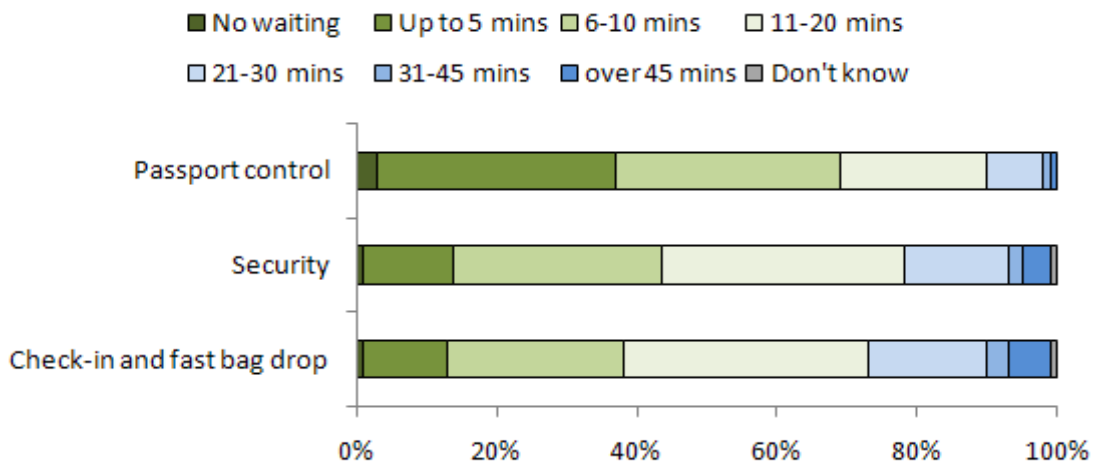
Base: all respondents (1619)

Those who were flying economy were more likely than those flying business/first class/premium economy to expect the same standard of service at the airport (88% vs. 75%) and during the flight (65% vs. 42%). Similarly, those who used a no-frills or charter airline were more likely to expect the same standard of service at the airport (89% and 93% vs. 84%) and during their flight (66% and 74% vs. 58%). However, despite these differences, all, regardless of the ticket class or airline type, still broadly supported the statements ‘the more I pay for the ticket, the higher the level of service I expect’ and ‘if I am travelling on a no-frills or budget airline, I expect that the standard of service will be lower’.

4.2 Maximum waiting times

When travelling through the departure airport, air passengers experience certain delays. Respondents felt that the maximum waiting times for passport control, security and check-in should be less than 20 minutes and many stated that it should be under 10 minutes (particularly for passport control).

Figure 4.2 Maximum waiting times



	Check-in and fast bag drop	Security	Passport control
No waiting	1	1	3
Up to 5 mins	12	13	34
6-10 mins	25	30	32
11-20 mins	35	35	21
21-30 mins	17	15	8
31-45 mins	3	2	1
over 45 mins	6	4	1
Don't know	1	1	0

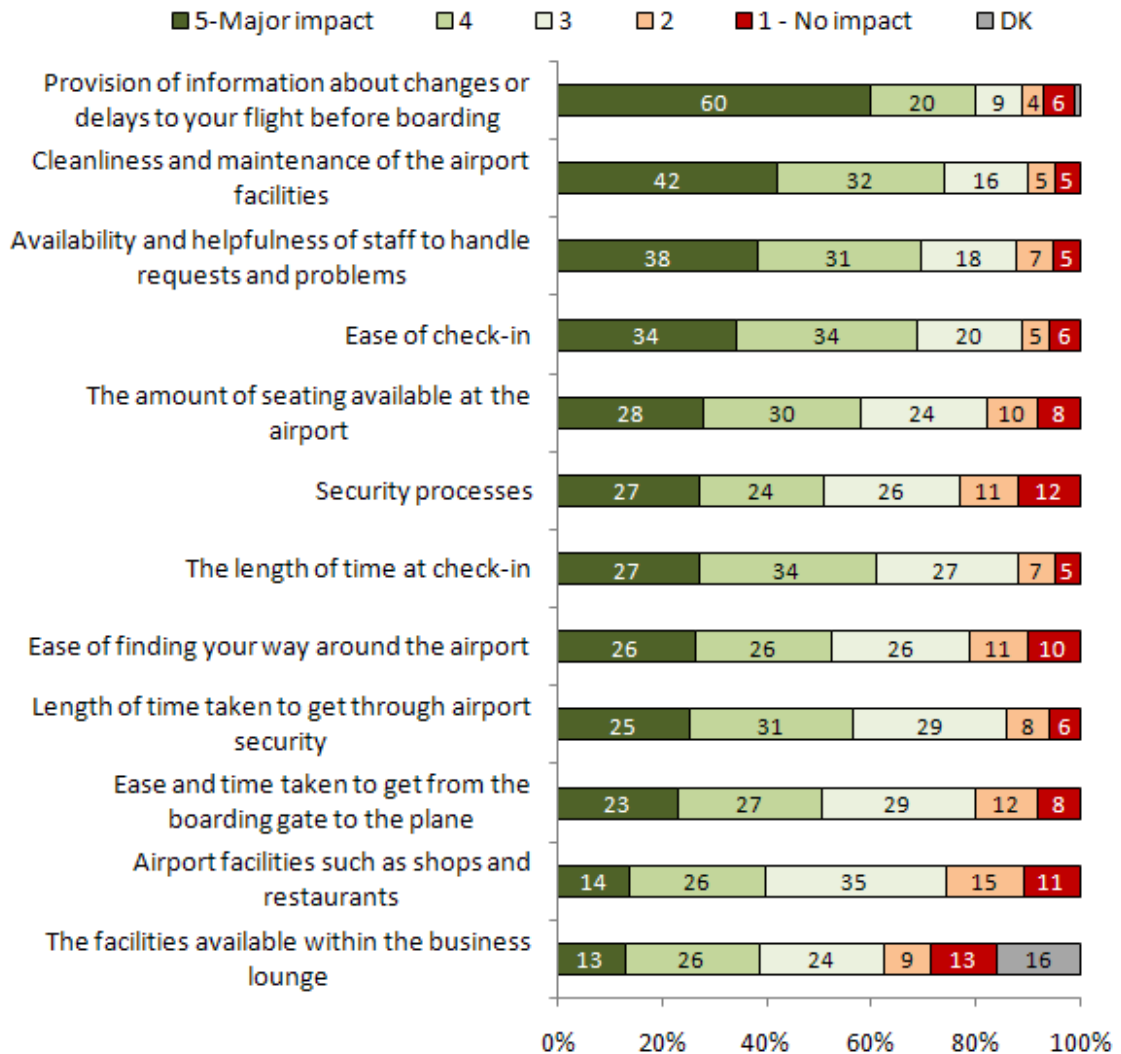
Base: all respondents (1619)

Business customers were less willing than leisure customers to wait at passport control (84% vs. 63%)⁴, security (57% vs. 38%) and at check-in/fast bag drop (58% vs. 30%). Those who were flying with a no-frills airline were no more willing to accept longer waiting times than those flying with a full-service airline.

A list of aspects of the departure from the airport was read out to respondents, who were asked to rate the impact each one had on their overall departure experience. Respondents were most likely to state that providing information about changes or delays before they boarded their aircraft had a major impact (60% rating it a 5). Other aspects with a major impact included the cleanliness of the airport facilities, availability and helpfulness of staff and the ease of check-in.

⁴ All figures given are the percentage who expect to wait 10 minutes or less.

Figure 4.3 Impact on overall departure experience of various aspects

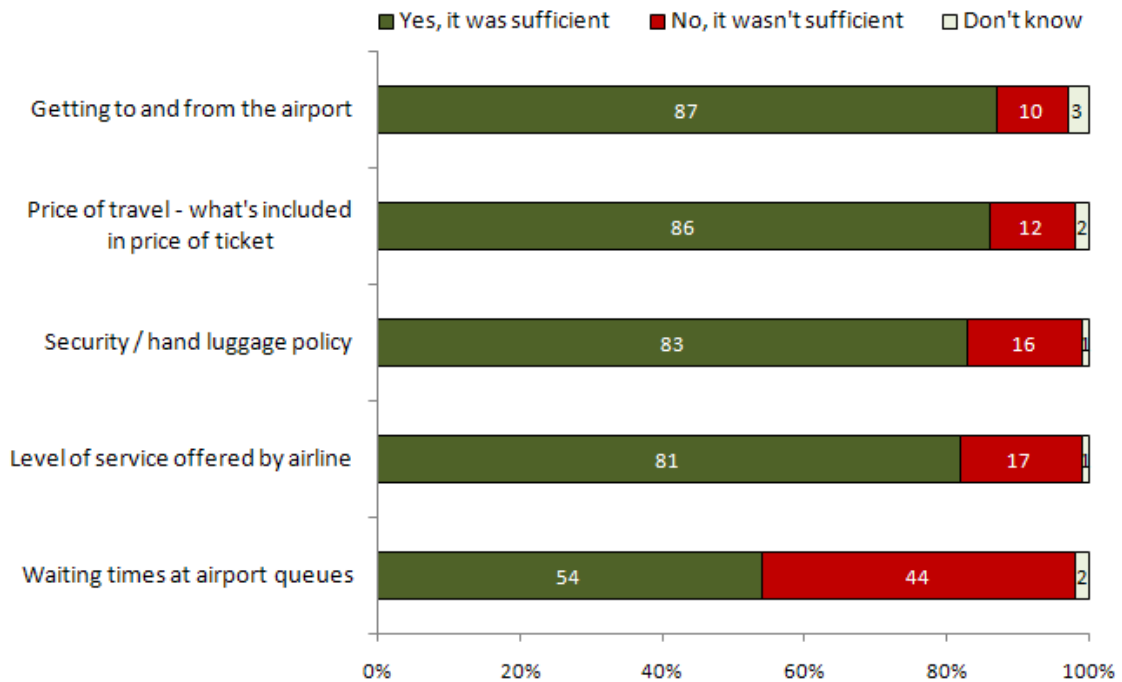


Base: all respondents (1619), except facilities to be available within the business lounge (all business respondents, 455).

The length of time taken to get through airport security (63% vs. 54%), the provision of information about changes or delays to the flight (89% vs. 77%) and punctual departure (91% vs. 81%) were all more likely to have a major impact on business customers than on leisure customers. However, the availability of staff to handle requests and problems was more likely to have a major impact on leisure customers than on business customers (71% vs. 65%).

Generally, respondents felt that they had enough information about getting to/from the airport, the price of travel, security/hand-luggage policy and the level of service offered by the airline. However, there were mixed views on whether they receive adequate information about the waiting times at airport queues.

Figure 4.4 Sufficient information about stages of travel



Base: all respondents (1619)

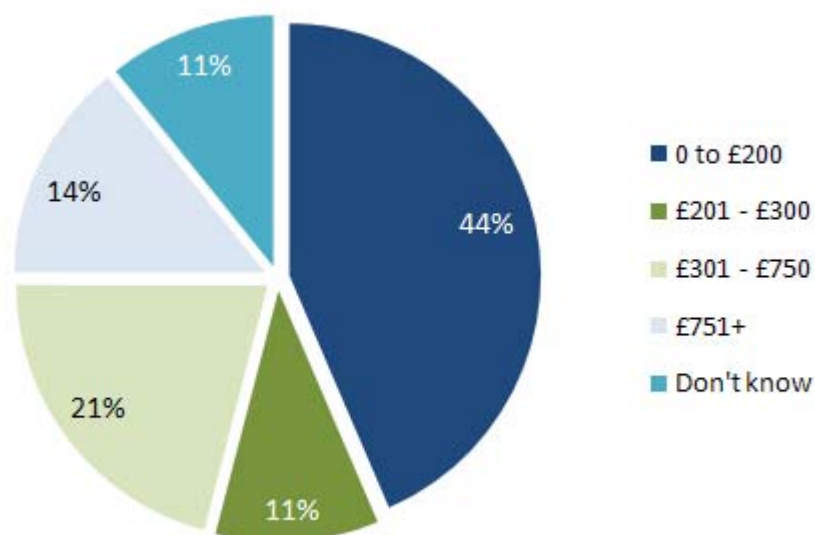
Those who used a full-service or a charter airline were more likely than those who used a no-frills airline to think that they had enough information on the price of travel (87% and 89% vs. 83%) and waiting times in queues (56% and 63% vs. 49%). Those who were flying for leisure were more likely than those flying for business to have sufficient information about waiting times in queues (58% vs. 46%) and security/hand luggage policy (85% vs. 78%).

5 Buying the ticket

5.1 Buying your ticket

This section of the study reports on the respondents' experiences of buying their air tickets. Slightly more than half bought their tickets on airline websites (54%) and 15% bought them from another travel website; they were also bought at travel agents' offices (10%) and with a travel agent by phone (9%). Two-thirds of flights were paid for by the respondent, 22% by their company/employer and 10% by someone else.

Figure 5.1 Price of ticket



Base: all respondents (1619)

5.2 Choosing your ticket

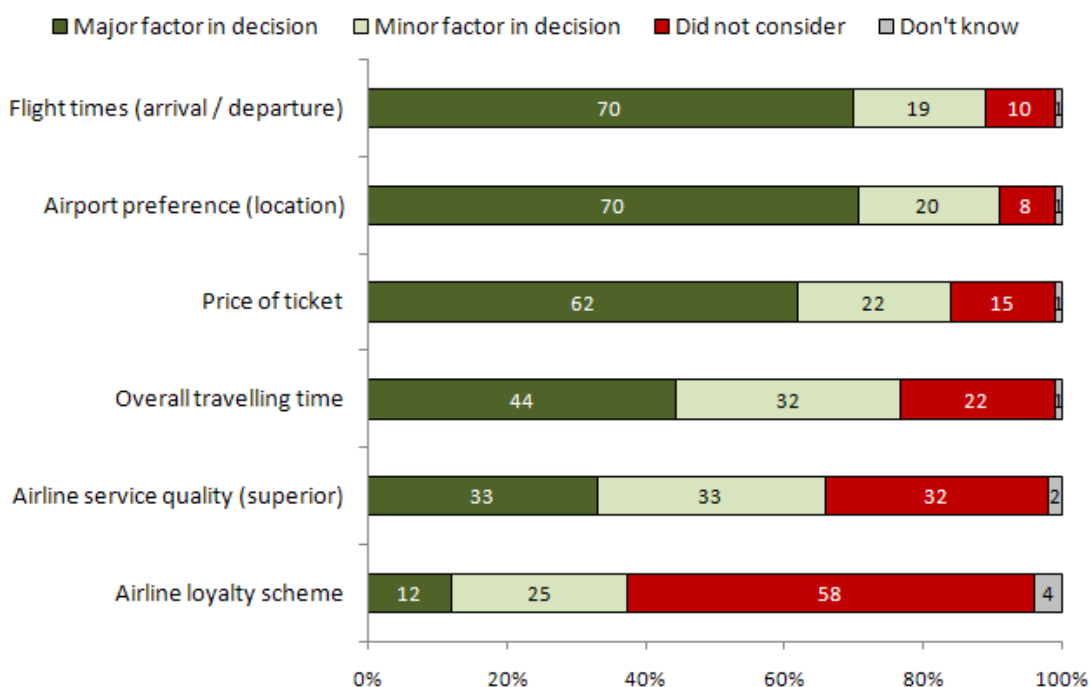
Slightly more than half (53%) of respondents shopped around before deciding on their flight, but 45% did not.

- International fliers were more likely than domestic customers to have shopped around (54% vs. 45%).
- Furthermore, those who were on a long-haul flight were more likely than those on short haul flights to have shopped around (60% vs. 50%).
- Finally, those who had booked their flight through a website were more likely to have shopped around than those who booked by phone or by another method (59% vs. 45% and 36%, respectively).

In light of the previous finding, it is not surprising that those who had shopped around generally did so via the internet (90%).

Respondents were asked to consider a list of factors in terms of the impact they had on choosing and booking flights. Most respondents felt that the location of the airport (70%), flight times (arrival/departure) (70%) and the price of the ticket (62%) were major factors in their decision.

Figure 5.2 Factors in decision



Base: all respondents (1619)

Key differences by respondents' sub-groups were as follows.

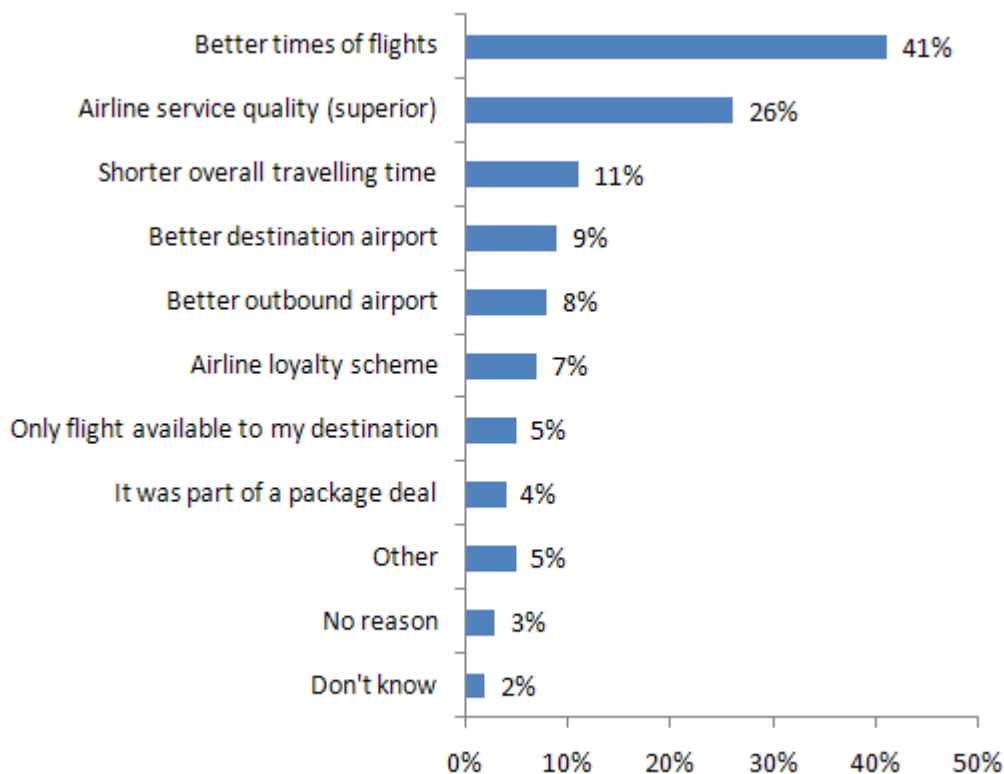
- The price of their ticket was a major factor in the decision for 73% of 16–34 year olds; this was significantly higher than for any of the other age groups (35–44, 60%; 45–60, 61%; 61+, 57%).
- Passengers at Stansted Airport were less likely than those who used other airports to view airline service quality as a major factor in their booking decision (20% vs. Heathrow, 43%; Gatwick, 37%; Manchester, 33%). Respondents who flew with a no-frills airline were also less likely to view airline service quality as a major factor in their decision than either charter or full-service airline passengers (22% vs. 34% and 41%, respectively).

- Flight times were more likely to have been a major decision-making factor for respondents who had flown for business reasons than those who had flown for leisure purposes (81% vs. 66%).
- Airline loyalty schemes were only considered a major factor by 12% of respondents but were more of a consideration for Heathrow passengers than for passengers at other airports (Heathrow, 25%; Gatwick, 11%; Manchester, 9%; Stansted, 7%). They were also more likely to be considered a major factor by respondents who flew business/first class/premium economy than those who flew economy (32% vs. 10%).

Although the price of the ticket was a factor in most people’s decisions, it was in many cases not the over-riding factor. In fact, only 39% of respondents bought the cheapest ticket available, 49% did not and 12% did not know. Possibly as a result of the predominance of no-frills/budget airlines flying from Stansted, passengers from this airport were most likely to have bought the cheapest flight available (54%).

The most common reasons for not buying the cheapest flight were to get better times of flight (41%) or a better quality airline service (26%).

Figure 5.3 Reasons for not choosing cheapest flight

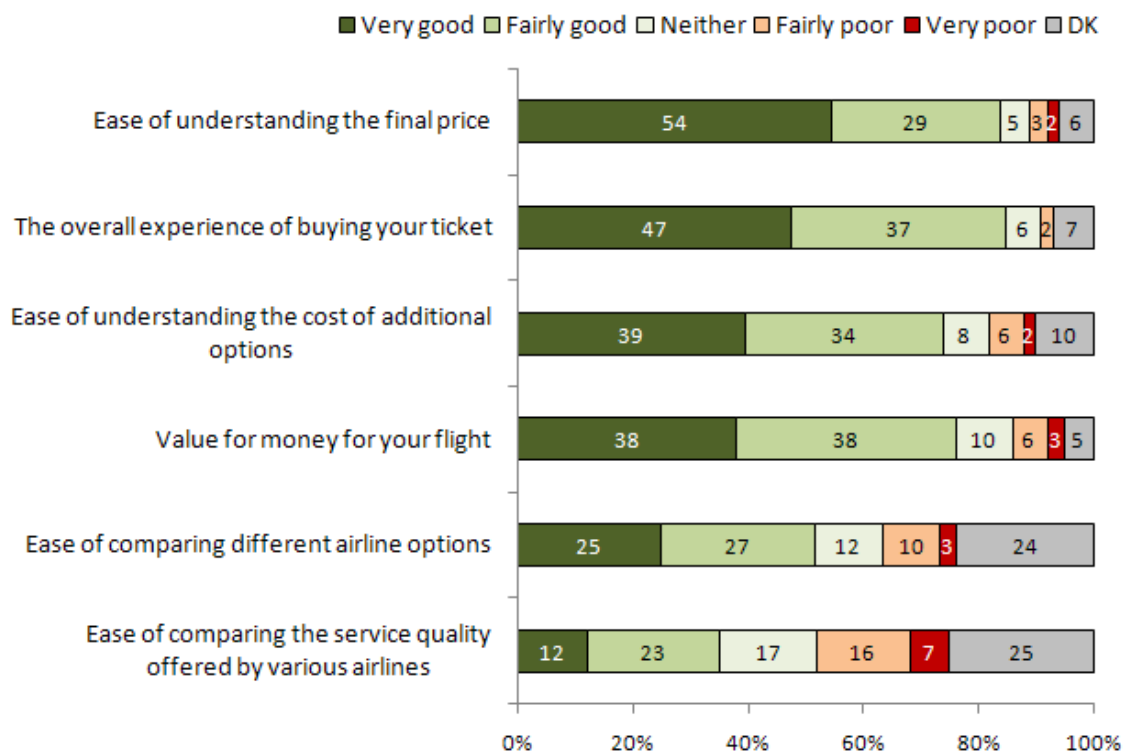


Base: all respondents who did not choose the cheapest flight (798)

5.3 Rating of buying experience

Although respondents felt that ease of understanding the final price (83%), understanding the cost of additional options (73%), overall experience of buying a ticket (85%) and value for money of flights were all good (76%); they were less positive that it was easy to compare the different airline options (52%) or to compare service quality (35%).

Figure 5.4 Rating of buying experience



Base: all respondents (1619)

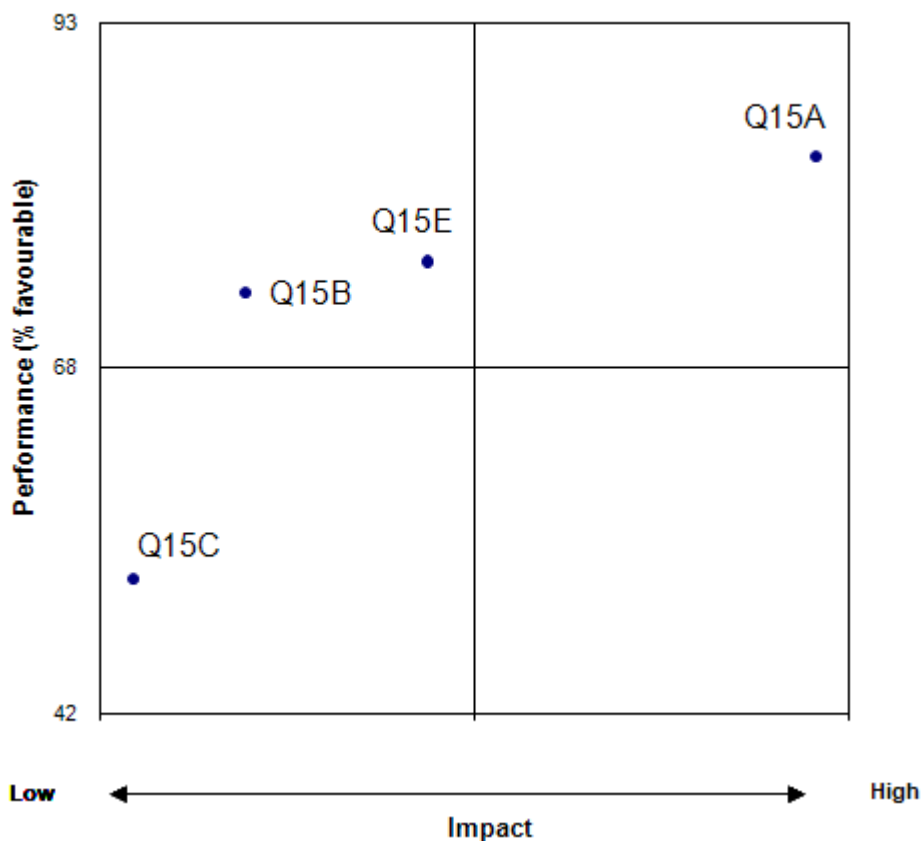
Those who had booked their flight online were more positive than those who had booked it over the phone about the:

- ease of understanding the final price (87% vs. 81%)
- ease of understanding the cost of additional options (77% vs. 69%)
- value for money of the flight (80% vs. 65%)
- overall experience of buying a ticket (89% vs. 80%).

5.4 Key drivers of satisfaction with the ticket-buying experience

Key driver analysis found that the key driver of satisfaction with the ticket-buying experience was ease of understanding the final price.

Figure 5.5 Key drivers of satisfaction



Question Key	
Q15A	Ease of understanding the final price
Q15E	Value for money of flight
Q15B	Ease of understanding the cost of additional options
Q15C	Ease of comparing different airline options

6 Departing from the airport

This section of the report looks at passengers' experience departing from Heathrow, Manchester, Stansted and Gatwick airports.

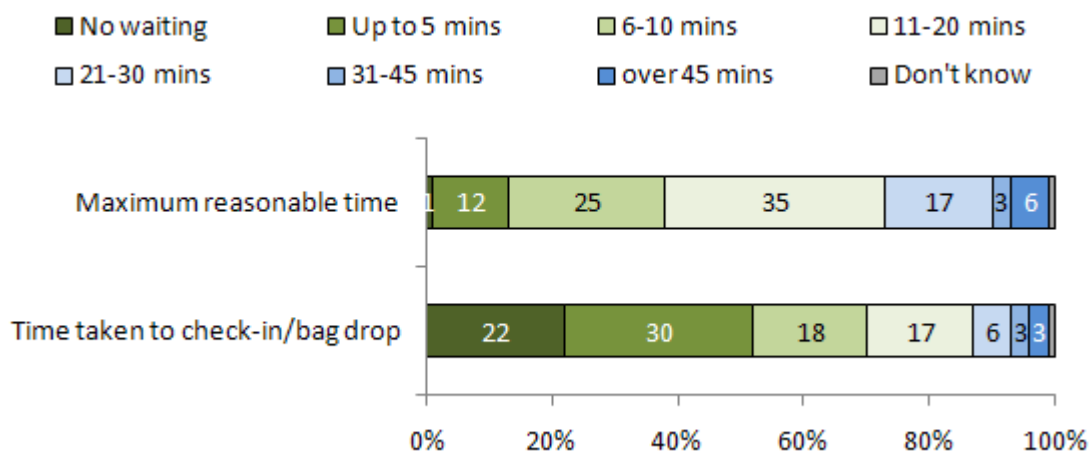
6.1 Check-in

Slightly less than two-thirds of respondents (62%) checked in at the airport check-in desk but a sizeable minority checked in either through the airline's website (27%) or through a self-service kiosk (9%).

- Heathrow passengers were less likely than Gatwick, Stansted or Manchester respondents to have checked in at the airline check-in desk (39% vs. 60%, 77% and 71%, respectively).
- Leisure customers (69%) and those flying on no-frills (72%) or charter airlines (95%) were more likely than business customers (46%) and those flying on a full-service airline (48%) to have checked in at the airline check-in desk.

Eighty-seven percent of respondents checked in their bags within 20 minutes. As Figure 6.1 (below) shows, this compares favourably with the 73% who thought they should wait for a maximum of 20 minutes. Thus respondents' minimum expectations for time taken to check-in are largely being met.

Figure 6.1 Time taken to check-in



Base: time taken (all respondents who checked in bags (1493)); maximum reasonable time (all respondents (1619))

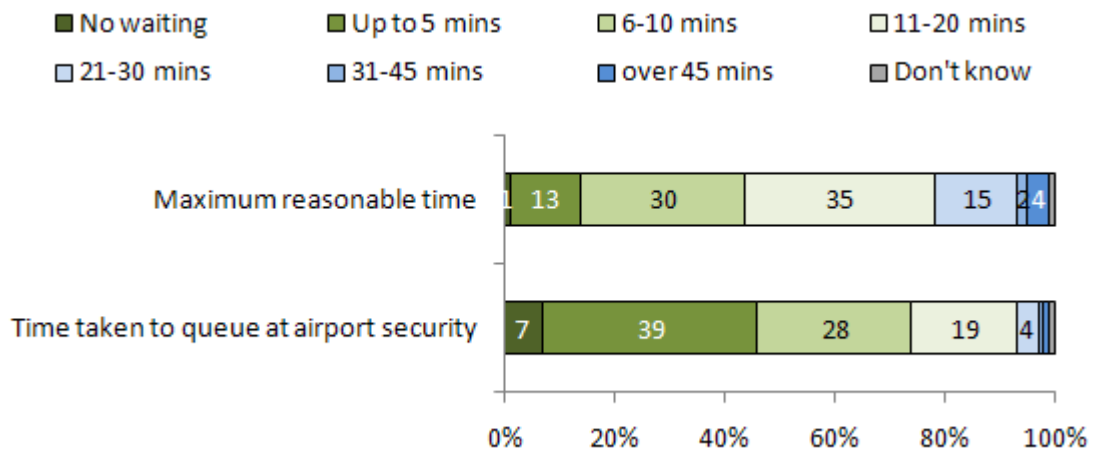
Heathrow Airport respondents were more likely than all other airports' respondents to wait less than 5 minutes (60% vs. 50%). Seventy-seven percent of those who travelled with a full-service airline queued for less than 10 minutes; just 34% on a charter flight did so. However, as noted earlier, charter airline respondents were more willing to

accept a longer check-in time than full-service airline customers. It is not clear whether their lower demands come from having experienced longer waiting times or if they are actually less demanding.

6.2 Security

Most respondents waited at security no longer than 10 minutes (74%). As with check-in, this compares favourably with the minimum standards expected; 44% expected to wait a maximum of 10 minutes.

Figure 6.2 Time taken to wait at security



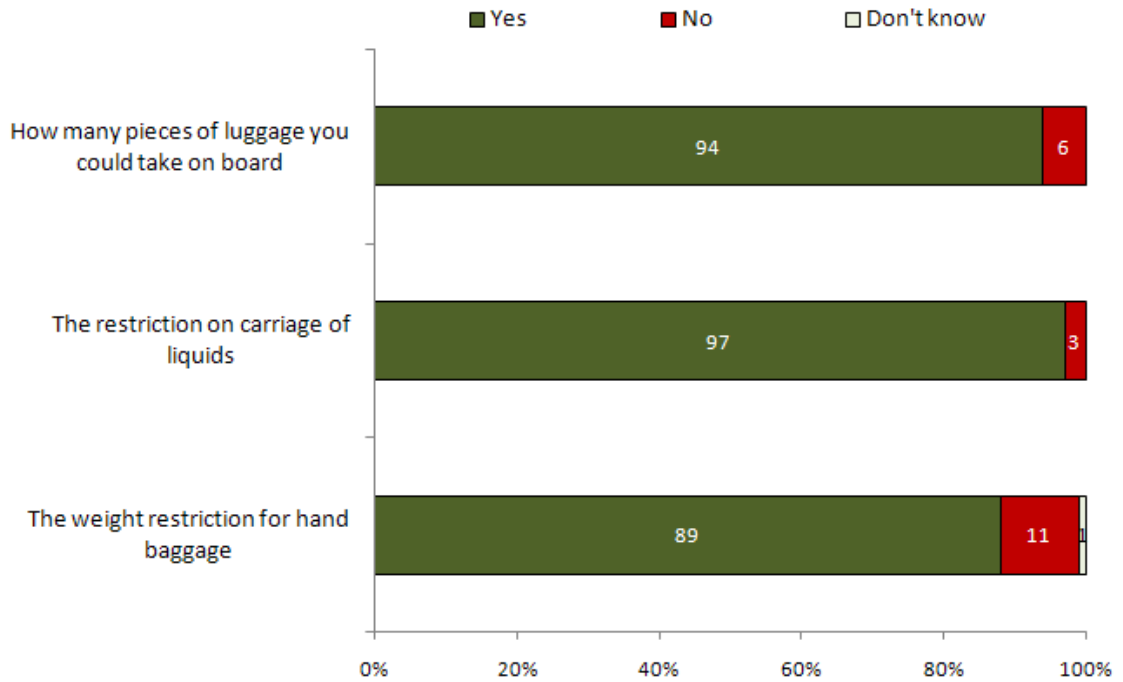
Base: all respondents (1619)

Respondents who used Stansted Airport were less likely than those who had used one of the three other airports to have waited for less than 10 minutes (63% vs. 78%).

6.3 Awareness of restrictions

There was high awareness of the restrictions on what air passengers were not allowed to take on board. Around nine in ten respondents knew the weight restriction of hand baggage (89%), restriction on carriage of liquids (97%) and luggage allowed on board (94%).

Figure 6.3 Awareness of restrictions

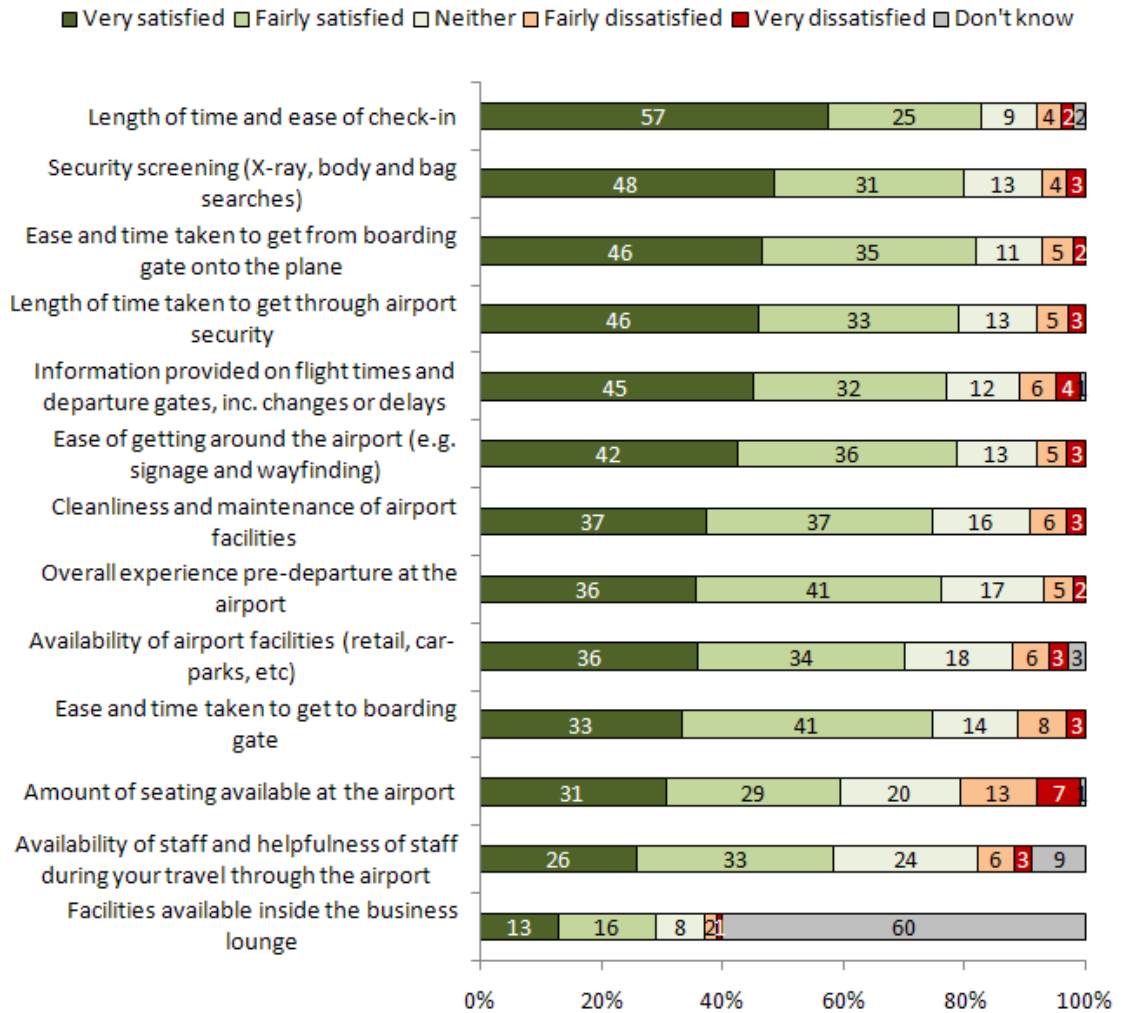


Base: all respondents (1619)

6.4 Satisfaction with departure experience

As shown in Figure 6.4, satisfaction with the various factors of the departure experience was high. Areas of lower performance appeared to be availability and helpfulness of staff, and the amount of seating available.

Figure 6.4 Satisfaction with departures experience



Base: all respondents (1619)

There was lower satisfaction recorded among respondents who had used Stansted Airport for many of the aspects of the departure. The key differences were:

- lower satisfaction than Manchester and Heathrow airports for length of time and ease of check in (77% vs. 85% both)
- lower satisfaction than all other airports for length of time to get through security (71% vs. Heathrow, 78%; Gatwick, 83%; Manchester, 84%)
- lower satisfaction than Manchester Airport for security screening process (75% vs. 86%)
- lower satisfaction than Heathrow Airport for amount of seating available (57% vs. 67%)

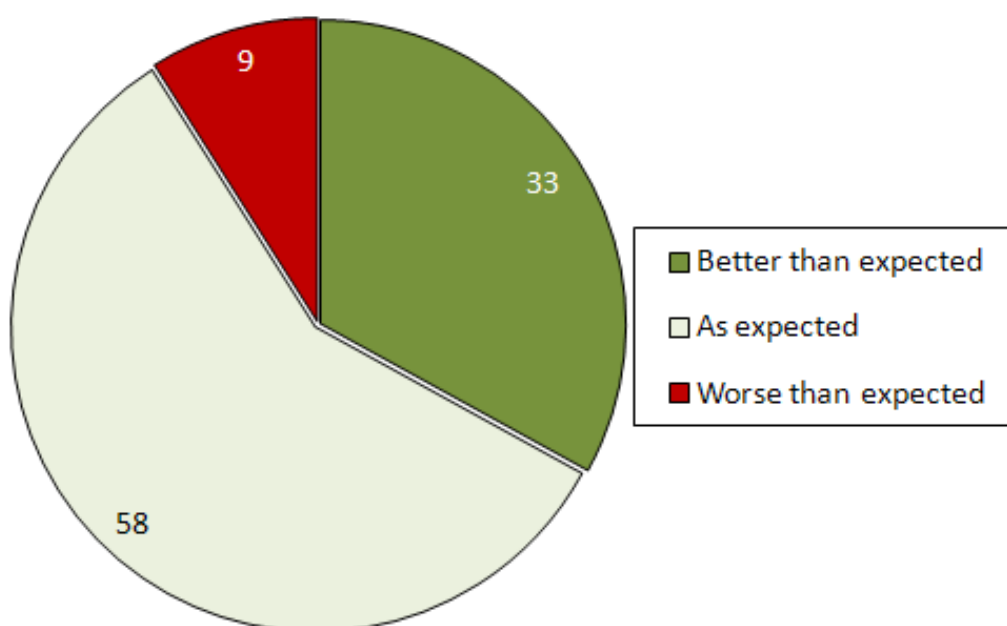
- lower satisfaction than Manchester Airport for ease and time taken to get to the boarding gate (72% vs. 78%) and for the ease and time taken to get from the gate onto the plane (74% vs. 85%).

Business customers were less satisfied than leisure customers with their overall pre-departure experience (73% vs. 79%). Specific aspects they were less satisfied with were:

- security screening process (73% vs. 82%)
- amount of seating available (51% vs. 63%)
- availability of staff available to help (53% vs. 61%).

Most respondents (91%), however, found that their actual experience when departing from the airport was at least as expected if not better than expected (see Figure 6.5 below).

Figure 6.5 Experience compared with expectations



Base: all respondents (1619)

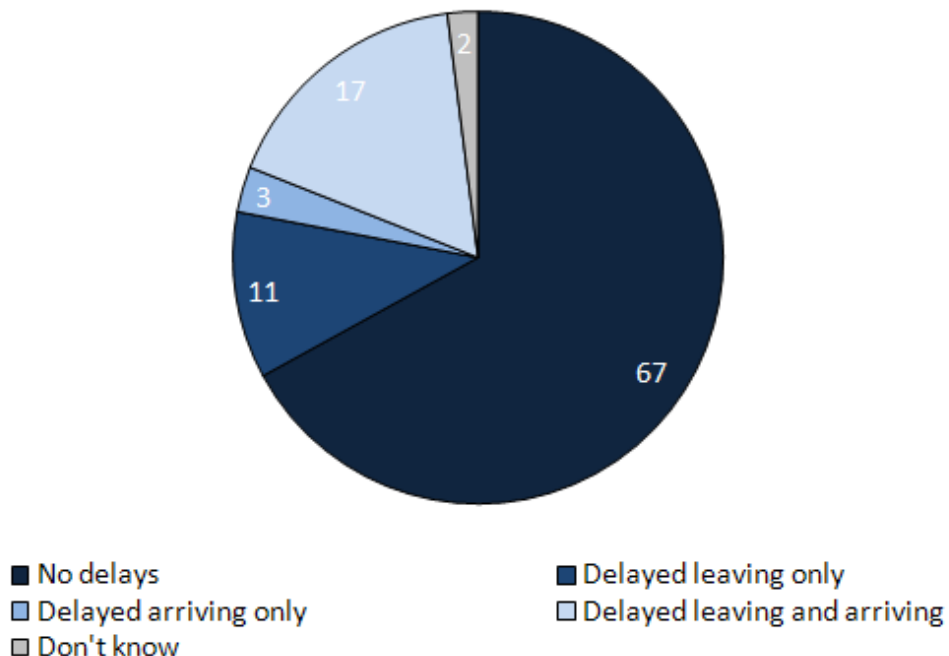
- Respondents who had flown from Heathrow were more likely to have had an experience that was better than their expectations (Heathrow, 48%; Gatwick, 32%; Manchester, 25%; Stansted, 28%).

- Passengers of a full-service airline were more likely than no-frills or charter passengers to have had a better-than-expected experience (37% vs. 28% and 29%, respectively).
- Similarly, those who flew business, first class or premium economy were more likely than economy-class respondents to have had a better-than-expected experience (42% vs. 32%);
- Unsurprisingly, those who waited for less time at check-in or at security were more likely to report they had a better-than-expected experience (check-in: <10mins, 37%; 10mins+, 24%; security: <10mins, 35%; 10mins+, 27%).

6.5 Delays to flight

Respondents were asked both whether their flight left on time and whether it arrived at its destination on time. In total, 67% of respondents experienced no delays, 17% were delayed departure and arrival, 11% delayed departure only and 3% had a delayed arrival only.

Figure 6.6 Delays to flight



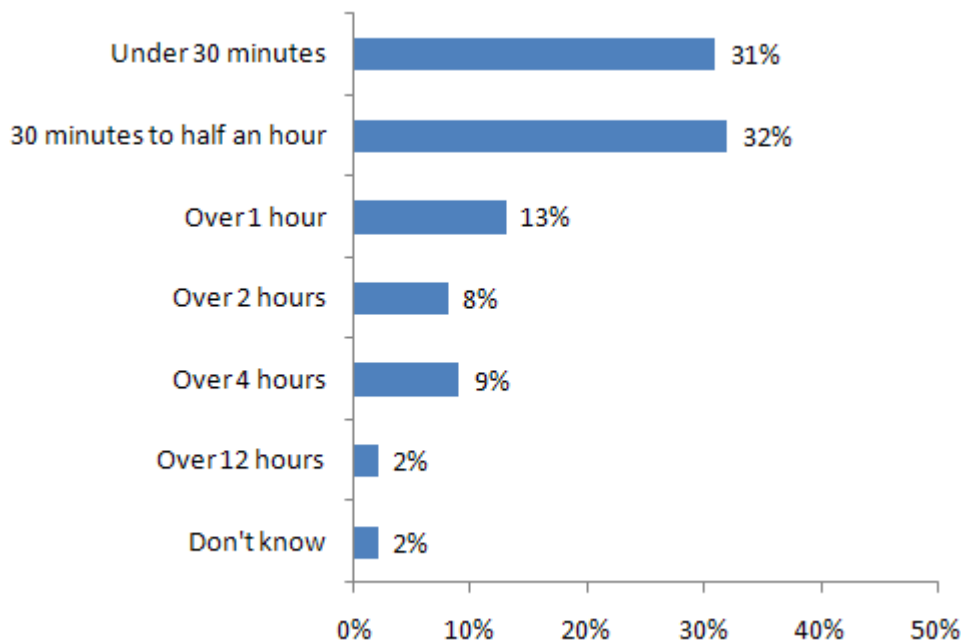
Stansted Airport respondents were more likely than Heathrow or Gatwick respondents to have experienced no delays (72% vs. 63% and 64%). Similarly, no-frills airline

passengers were more likely than charter airline respondents to have experienced no delays (71% vs. 60%).

Respondents whose flight departed or arrived on time were more likely than delayed passengers to report that their departures' experience was better than expected (depart on time, 35%; depart late, 27%; arrive on time, 35%; arrive late, 24%). These groups of respondents were also more likely to be satisfied with their overall pre-departure experience (depart on time, 80%; depart late, 69%; arrive on time, 80%; arrive late, 66%).

About two-thirds of respondents (63%) reported that their flight was delayed on arrival by less than an hour (see Figure 6.7).

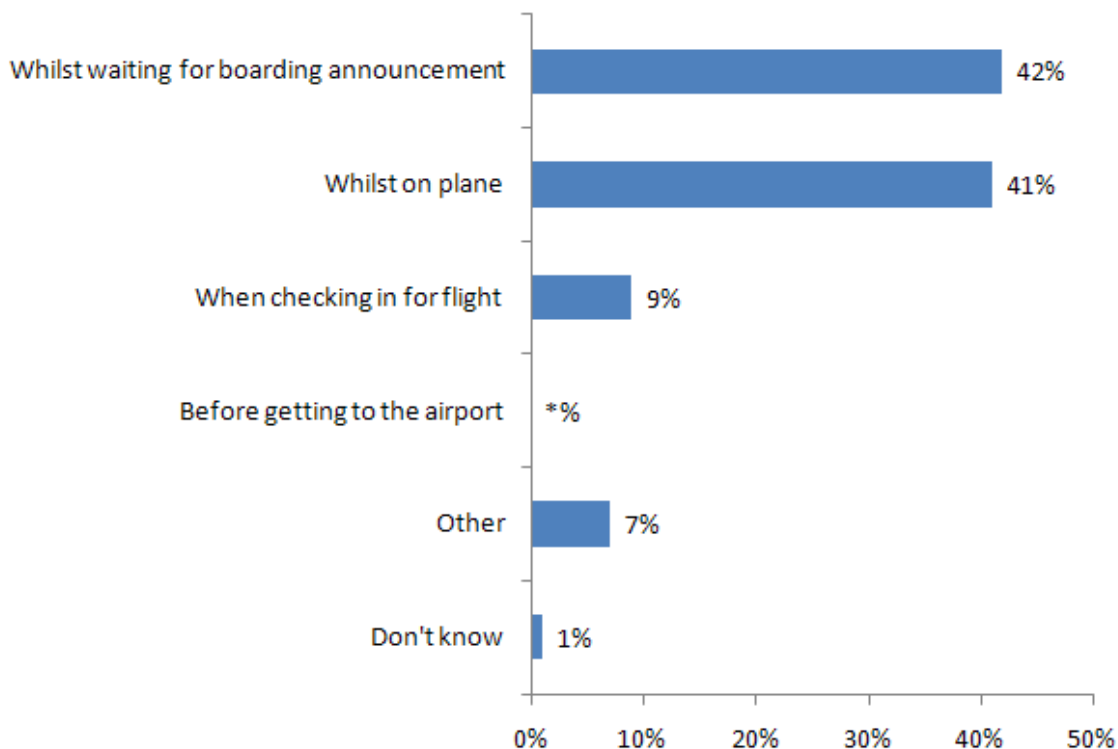
Figure 6.7 Length of delay to flight



Base: all respondents who were delayed in arrival (323)

Most respondents found out that their flight was delayed while waiting for their boarding announcement (42%) or when actually on the plane (41%) (see Figure 6.8).

Figure 6.8 Information about delays

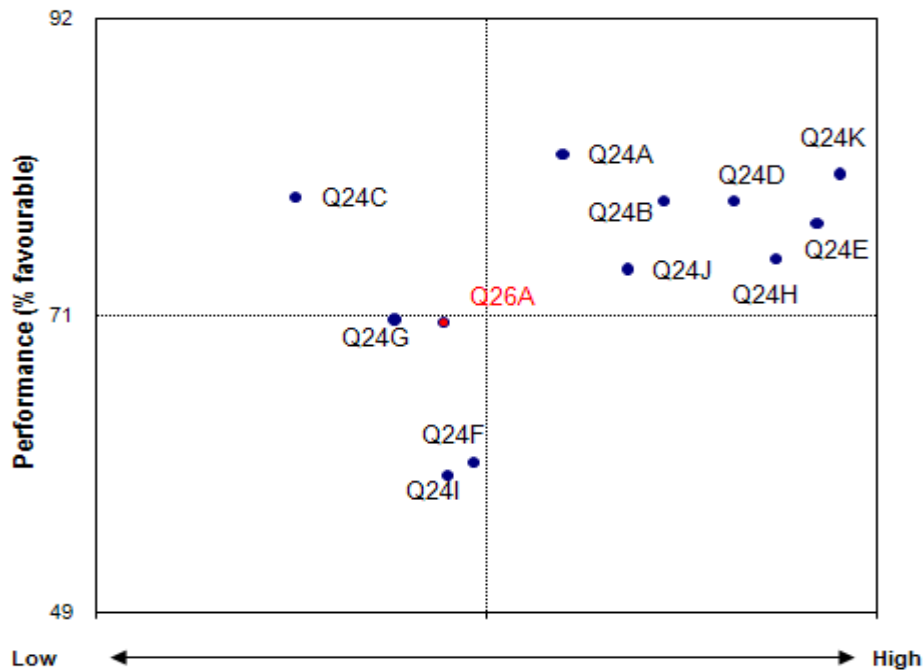


Base: all respondents whose flight was delayed (505)

6.6 Key drivers of satisfaction with pre-departure experience

Key driver analysis found that the key drivers of satisfaction with the departure experience were ease and time getting from the boarding gate onto the plane; the information provided on flight times and departure gates, including information about changes or delays; cleanliness and maintenance of airport facilities; and the ease of getting around the airport. Encouragingly, all these areas were performing relatively well, and therefore airports should focus on keeping satisfaction levels high in these areas. Importantly, areas that had relatively low levels of satisfaction, i.e. the amount of seating at the airport and availability and helpfulness of staff were considered not to be as important.

Figure 6.9 Key drivers of satisfaction with departures experience



Question Key		
Q24K	How satisfied were you with the following elements of your experience whilst at the airport...Ease and time taken to get from boarding gate onto the plane	81
Q24E	How satisfied were you with the following elements of your experience whilst at the airport...Information provided on flight times and departure gates including changes or delays to your flight	77
Q24H	How satisfied were you with the following elements of your experience whilst at the airport...Cleanliness and maintenance of airport facilities	75
Q24D	How satisfied were you with the following elements of your experience whilst at the airport...Ease of getting around the airport (eg signage and way finding)	79
Q24B	How satisfied were you with the following elements of your experience whilst at the airport...Length of time taken to get through airport security	79
Q24J	How satisfied were you with the following elements of your experience whilst at the airport...Ease and time taken to get to the boarding gate	74
Q24A	How satisfied were you with the following elements of your experience whilst at the airport... Length of time and ease of check-in	82
Q24F	How satisfied were you with the following elements of your experience whilst at the airport...Amount of seating available at the airport	60
Q24I	How satisfied were you with the following elements of your experience whilst at the airport...Availability of staff and helpfulness of staff during your travel through the airport (with h...	59
Q26A	Did your flight leave on time?	70
Q24G	How satisfied were you with the following elements of your experience whilst at the airport...Availability of airport facilities (retail, car parks etc)	70
Q24C	How satisfied were you with the following elements of your experience whilst at the airport...Security screening process (X-ray, body and bag searches)	79

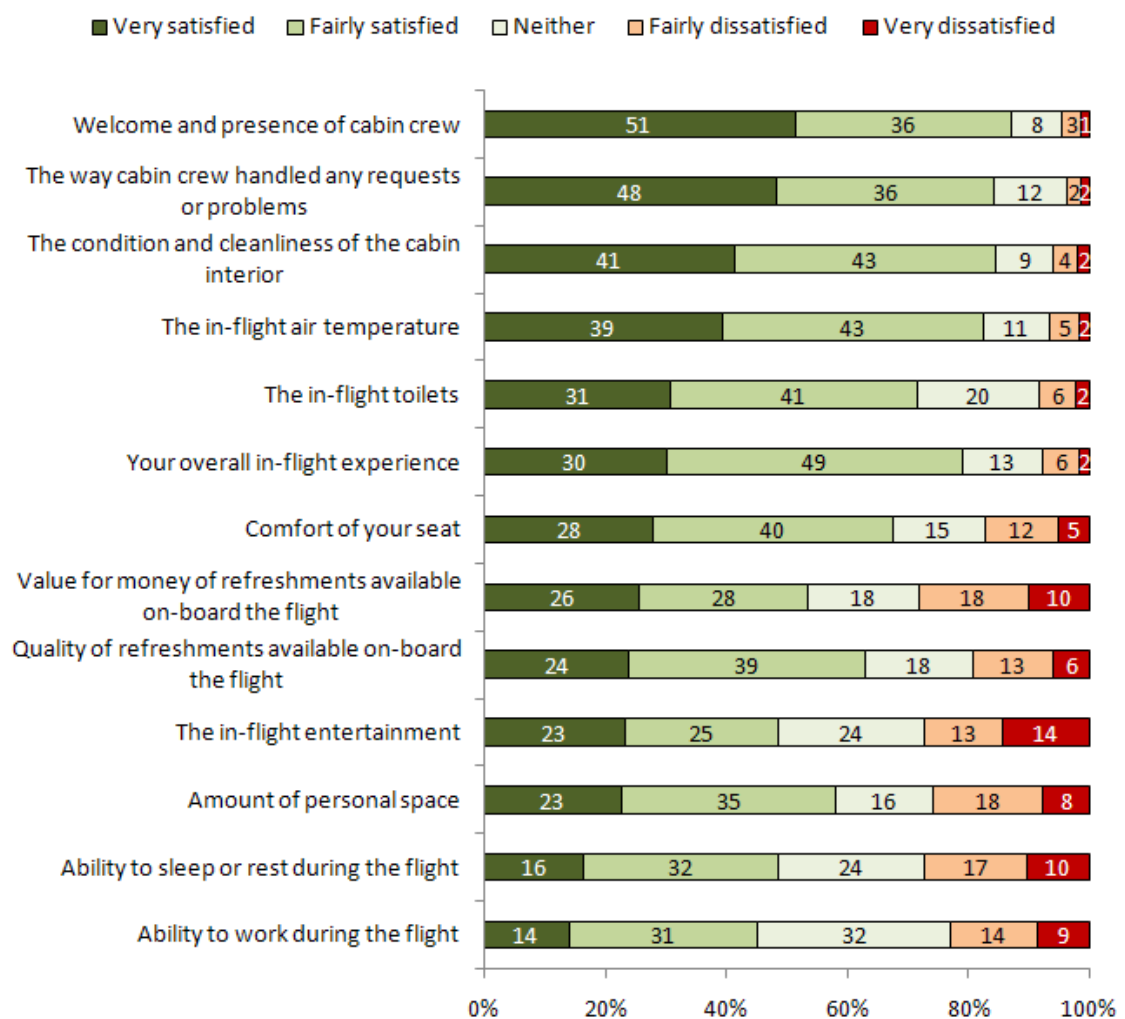
7 In-flight experience

This section of the report comments on respondents' attitudes towards their in-flight experience.

7.1 Satisfaction with in-flight experience

Most respondents were satisfied with the cabin crew, the condition and cleanliness of the cabin, the in-flight temperature, the plane's toilets and, importantly, their overall in-flight experience. They were least satisfied with the effectiveness of their personal space, whether simply the amount of personal space, or their ability to work, sleep or rest.

Figure 7.1 Satisfaction with in-flight experience



Base: all respondents, excluding not applicable (942 – 1617)

For many aspects of the journey, passengers of full-service airlines were more satisfied than those who travelled with a no-frills airline:

- comfort of their seat (71% vs. 57%)
- in-flight entertainment (57% vs. 26%)
- ability to sleep or rest during the flight (55% vs. 42%)
- ability to work during the flight (50% vs. 40%)
- value for money of refreshments (66% vs. 36%)
- quality of refreshments (70% vs. 50%).

Those who travelled business/first class/premium economy were also more satisfied than those who travelled economy with aspects of their experience including:

- comfort of their seat (83% vs. 66%)
- in-flight entertainment (76% vs. 45%)
- amount of personal space (79% vs. 56%)
- ability to sleep or rest during the flight (66% vs. 46%)
- value for money of refreshments (70% vs. 52%).

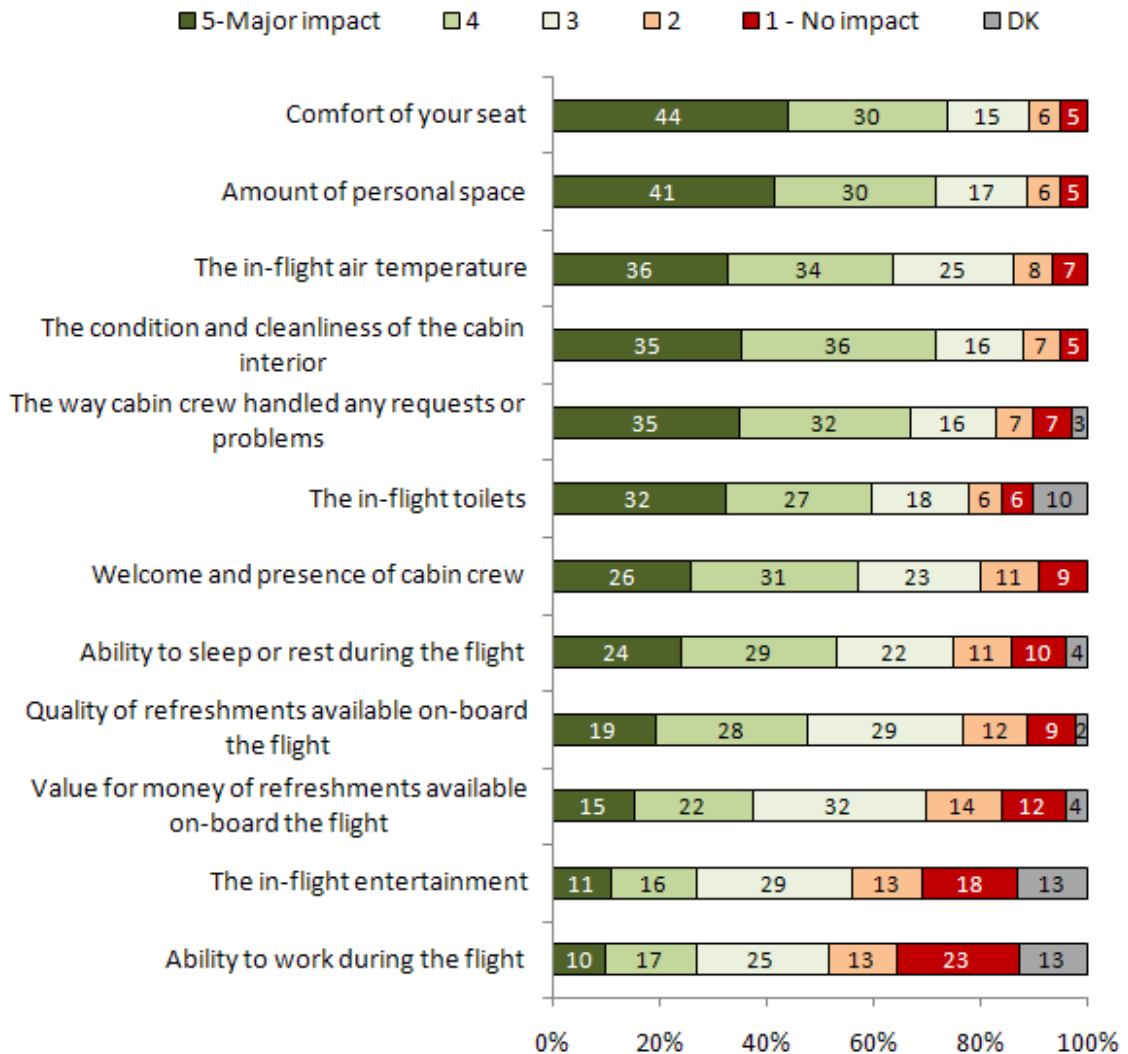
However, despite these differences in aspects of the flight, there were no differences in overall satisfaction with the in-flight experience.

7.2 Most important aspects of the in-flight experience

Aspects deemed by respondents to have the greatest impact on their overall in-flight satisfaction (see Figure 7.2) were the comfort of their seat (74%),⁵ the amount of personal space (71%), the condition and cleanliness of the interior (71%), the in-flight air temperature (70%) and the way the cabin crew handled any requests or problems (67%).

⁵ All figures quoted are the percentage of respondents who rated it 4 or 5 out of 5 for impact.

Figure 7.2 Most important aspects



Base: all respondents (1619)

In general, those that had been on a long-haul flight were more likely to consider that aspects of their in-flight service had a major impact on their overall experience – possibly because of the longer time they spend on the flight. In particular, they were more likely to think the following were major factors:

- condition and cleanliness of cabin interior (77% vs. 69%)
- the in-flight toilets (68% vs. 56%)
- comfort of seat (80% vs. 71%)
- amount of personal space (78% vs. 70%)

- in-flight entertainment (47% vs. 19%)
- ability to sleep or rest during the flight (68% vs. 48%).

Those who travelled on business/first class/premium economy flights also thought a greater number of aspects of the service had a major impact on their experience:

- condition and cleanliness of cabin interior (71% vs. 56%)
- way cabin crew handles any requests or problems (78% vs. 66%)
- ability to sleep or rest during the flight (69% vs. 52%)
- quality of refreshments available on-board the flight (63% vs. 45%).

Similarly, those who flew with a full-service airline were more likely than those who used a no-frills airline to consider the following issues to be major factors in their experience:

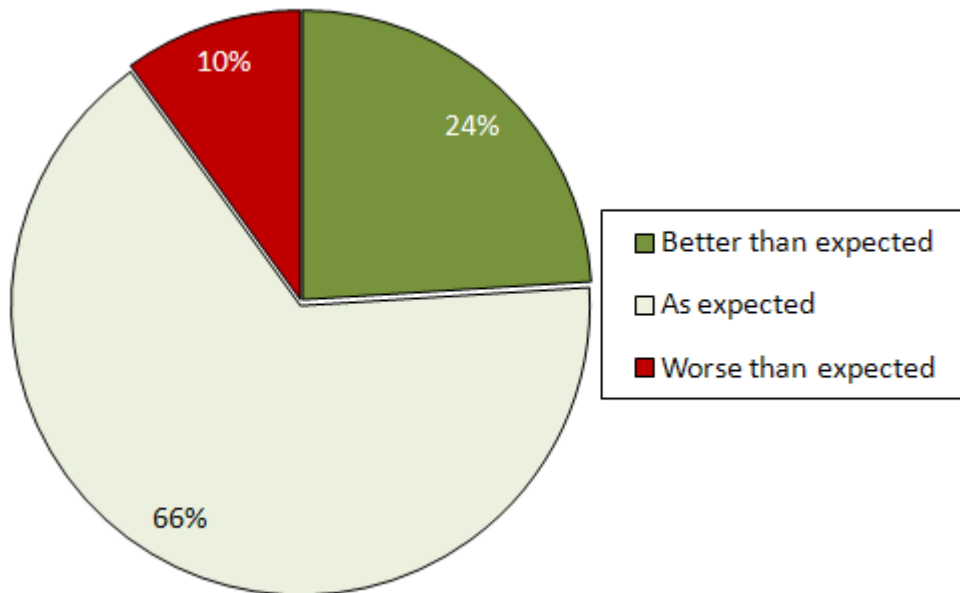
- the in-flight toilets (64% vs. 53%)
- comfort of seat (77% vs. 67%)
- amount of personal space (76% vs. 64%)
- ability to sleep or rest during the flight (59% vs. 46%)
- quality of refreshments available on-board the flight (52% vs. 39%).

It is not surprising that those who flew for business reasons were more likely than those who flew for leisure to think that the ability to work during the flight had a major impact on their overall experience (45% vs. 21%).

7.3 Overall opinion of the in-flight experience

Ninety percent of respondents felt that their in-flight experience was at least as good, if not better than expected (see Figure 7.3).

Figure 7.3 Experience compared with expectations

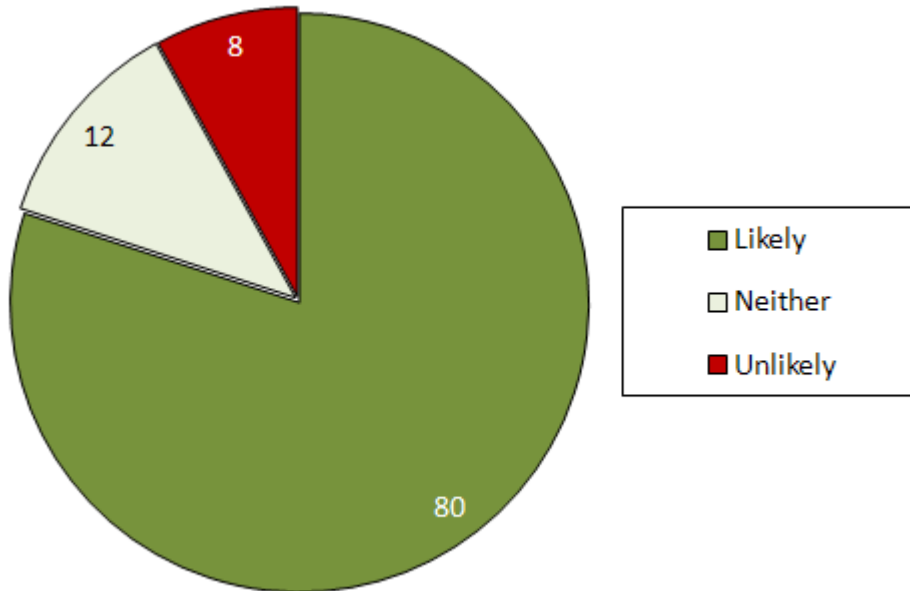


Base: all respondents (1619)

- Respondents who had used Heathrow Airport were more likely than those who had flown from Gatwick or Stansted to have had a better-than-expected experience (32% vs. 22% and 18%, respectively).
- Those who were flying business/first class/premium economy were also more likely than those who flew economy to have had a better-than-expected experience (35% vs. 23%). Similarly, those who flew with a full-service airline were more likely than those who used a no-frills airline to have had a better-than-expected experience (29% vs. 18%). However, these differing levels of experience did not necessarily mean a worse than expected experience but rather an experience that was similar to expectations.

Four-fifths of respondents (80%) stated that they were likely to recommend their airline to a friend; only 8% stated that they were unlikely to.

Figure 7.4 Likelihood to recommend airline



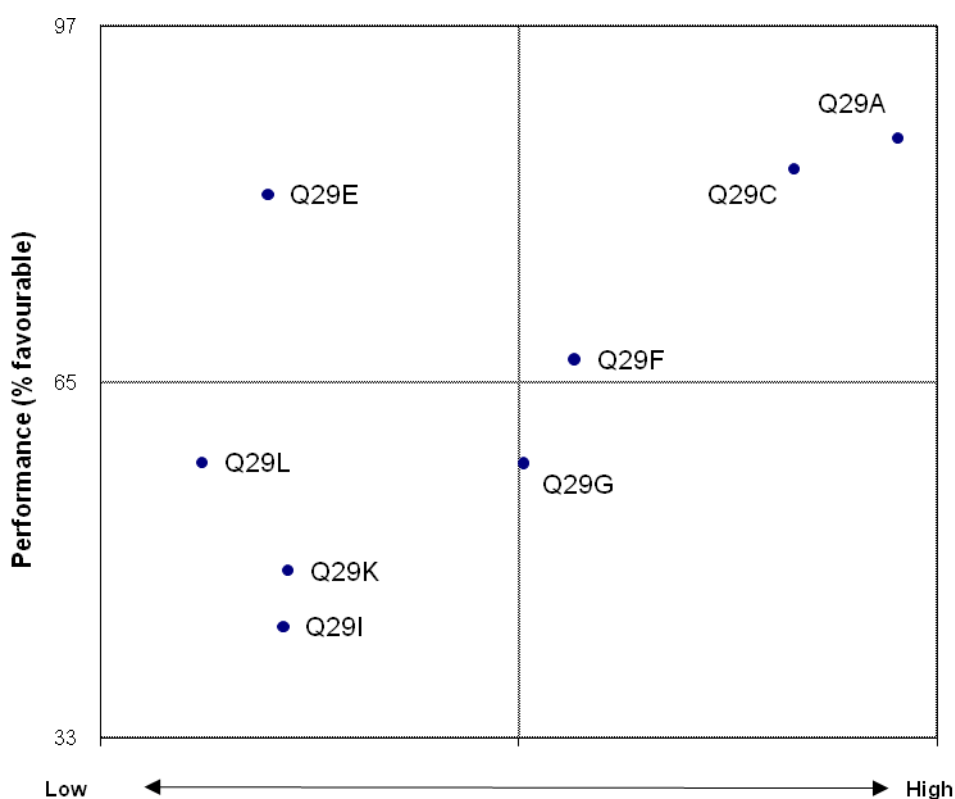
Base: all respondents (1619)

There were no significant differences in likelihood to recommend by journey length, travel class or airline type. However, respondents who had travelled for leisure purposes were more likely than business customers to recommend their airline (81% vs. 76%).

Unsurprisingly, respondents whose flight had departed or arrived on time were more likely than those who had experienced delays to recommend their airline (departure on time: 83%, departure late: 74%; arrival on time: 82%, arrival late, 71%). Similarly, respondents who had a positive experience of buying the ticket, departing from the airport or in-flight experience were all more likely to recommend their airline than those who had had a negative experience (buying: 83% vs. 58%; pre-departure: 84% vs. 64%; in-flight: 87% vs. 35%).

7.4 Key drivers of satisfaction with in-flight experience

Key driver analysis found that the key drivers of satisfaction with the in-flight experience were satisfaction with the welcome and presence of the cabin crew and satisfaction with the condition and cleanliness of the cabin interior. Importantly for overall satisfaction, both these areas are performing relatively well. Furthermore, the two aspects with the worst relative satisfaction, namely ability to sleep and quality of refreshments were areas with less impact on overall satisfaction.



Question Key		
Q29A	How satisfied were you with the welcome and presence of cabin crew (in-flight)	87
Q29C	How satisfied were you with the condition and cleanliness of the cabin interior (in-flight)	84
Q29F	How satisfied were you with the comfort of your seat (in-flight)	67
Q29G	How satisfied were you with the amount of personal space (in-flight)	58
Q29K	How satisfied were you with value for money of refreshments available onboard the flight (in-flight)	48
Q29I	How satisfied were you with the ability to sleep or rest during the flight (in-flight)	43
Q29E	How satisfied were you with the air temperature (in-flight)	82
Q29L	How satisfied were you with the quality of refreshments available onboard the flight (in-flight)	58

8 Arrival experience

This section of the report analyses respondents' experiences when arriving at Gatwick, Heathrow, Manchester and Stansted airports.

8.1 Disembarking from aircraft

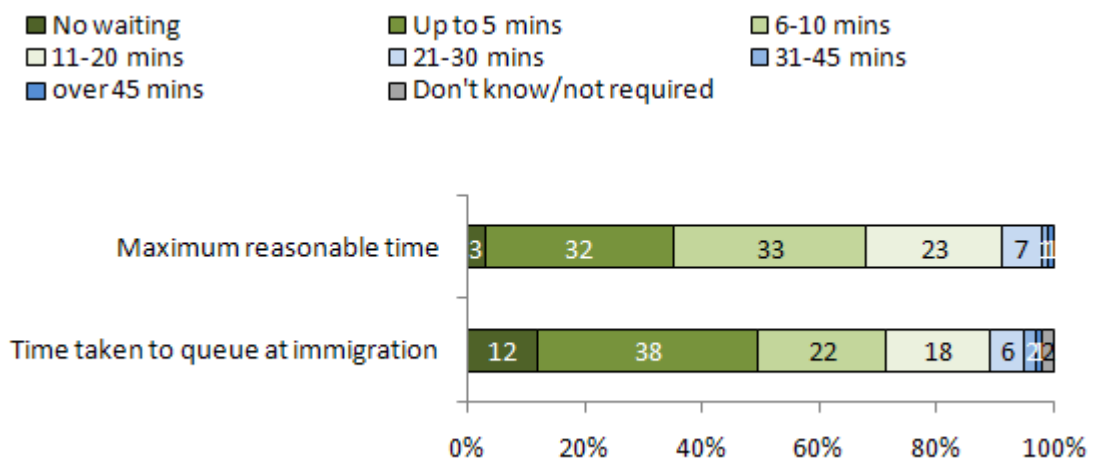
About half of respondents (53%) disembarked from their aircraft via an airbridge, 33% disembarked by aircraft steps and 9% had to get a bus to the terminal.

- Although most Gatwick and Heathrow airport respondents disembarked via an airbridge (67% and 74%, respectively) and about half of Manchester Airport respondents did likewise, most Stansted passengers disembarked via airport steps (70%).
- Most charter and full service airline passengers disembarked via an airbridge (82% and 68%, respectively); however, most no-frills airline passengers left by aircraft steps (62%).

8.2 Wait at immigration / passport control

Ninety percent of respondents who travelled through international arrivals waited for less than 20 minutes at immigration; this compared with 91% who had stated earlier that the maximum length of time they were prepared to wait was 20 minutes.

Figure 8.1 Wait at immigration

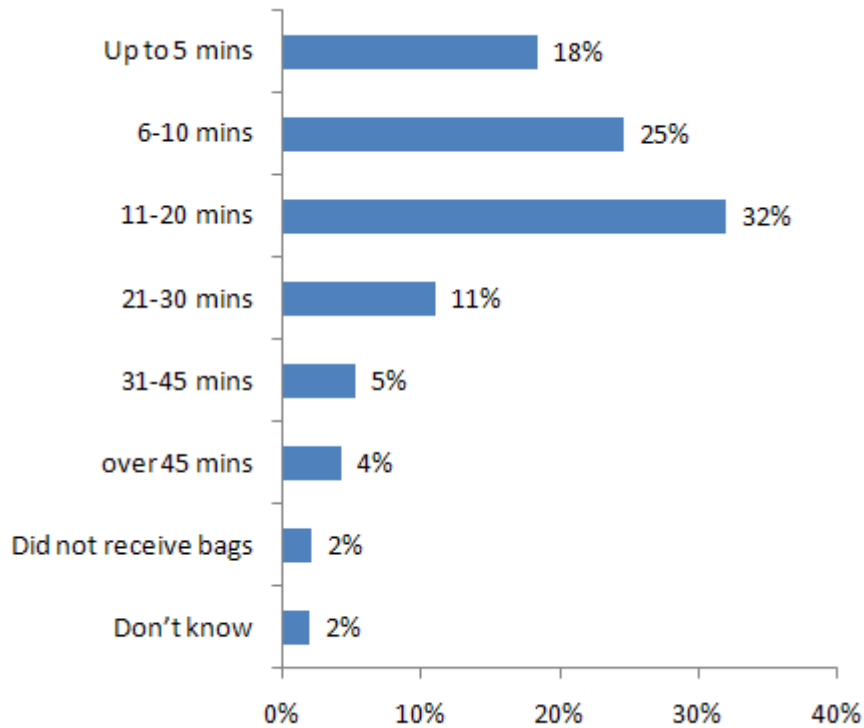


Base: all respondents who flew to an international destination (1379)

Heathrow's international passengers were more likely than Gatwick, Stansted or Manchester's international passengers to wait less than 20 minutes at immigration (78% vs. 70%, 68% and 71%, respectively).

Three-quarters (75%) of respondents who checked their luggage in waited less than 20 minutes to reclaim it.

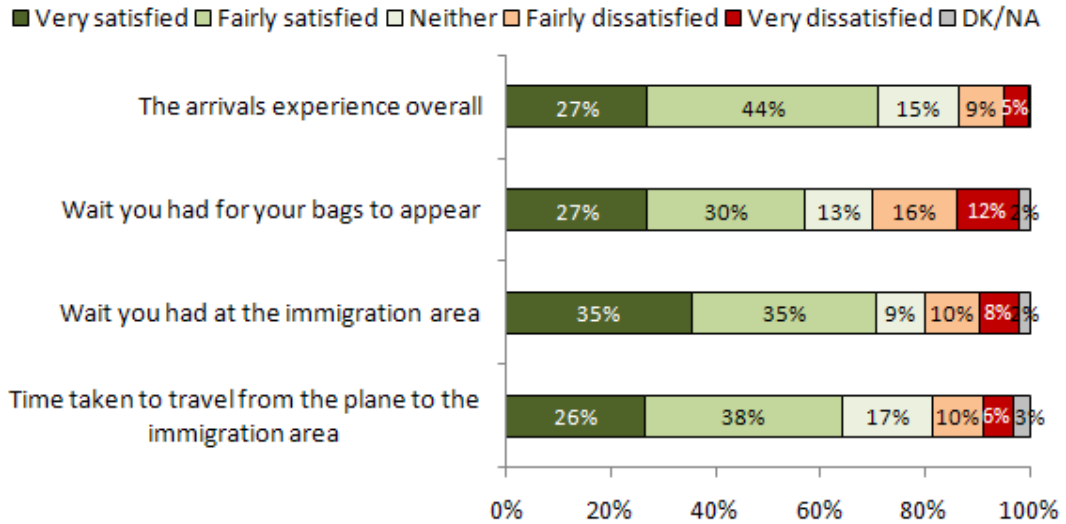
Figure 8.2 Length of wait to get luggage



Base: all respondents who checked in luggage (1357)

- Stansted Airport respondents were most likely to wait less than 20 minutes (82%); around three-quarters of Manchester and Heathrow airports' passengers were also likely to wait less than 20 minutes (73% and 72%); but Gatwick Airport respondents were less likely (60%).
- Passengers of no frills airlines were more likely than those who flew with a full-service airline to receive their luggage within 20 minutes (82% vs. 75%).

8.3 Perception of arrival experience



Base: the arrivals experience (all, 1619); wait for bags (all who checked in bags, 1083); wait at immigration (all international arrivals, 1357); travelling time (all, 1619)

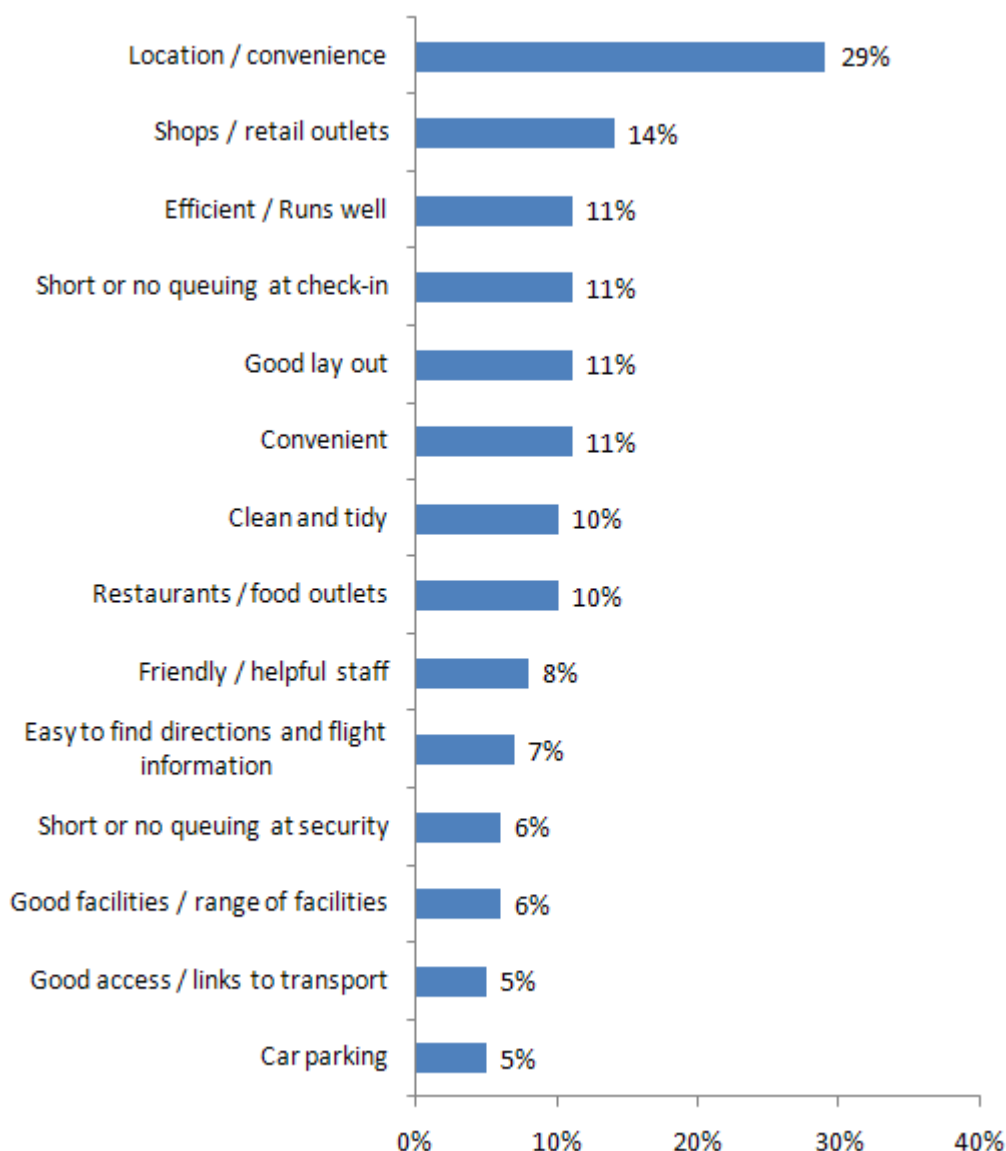
Those who had travelled for leisure were more likely than those who travelled for business to be satisfied with the overall arrival experience (74% vs. 64%). Those who travelled economy were also more satisfied than those who travelled business/first-class/premium economy (72% vs. 60%).

9 Overall opinion of travel

9.1 Airports' best features

All respondents were asked what they liked most about their experience of using the airport. The most common aspects were its location/convenience (29%), its shops/retail outlets (14%), the short queue at the check-in desk (11%) and the good lay-out (11%).

Figure 9.1 What respondents liked best about the airport

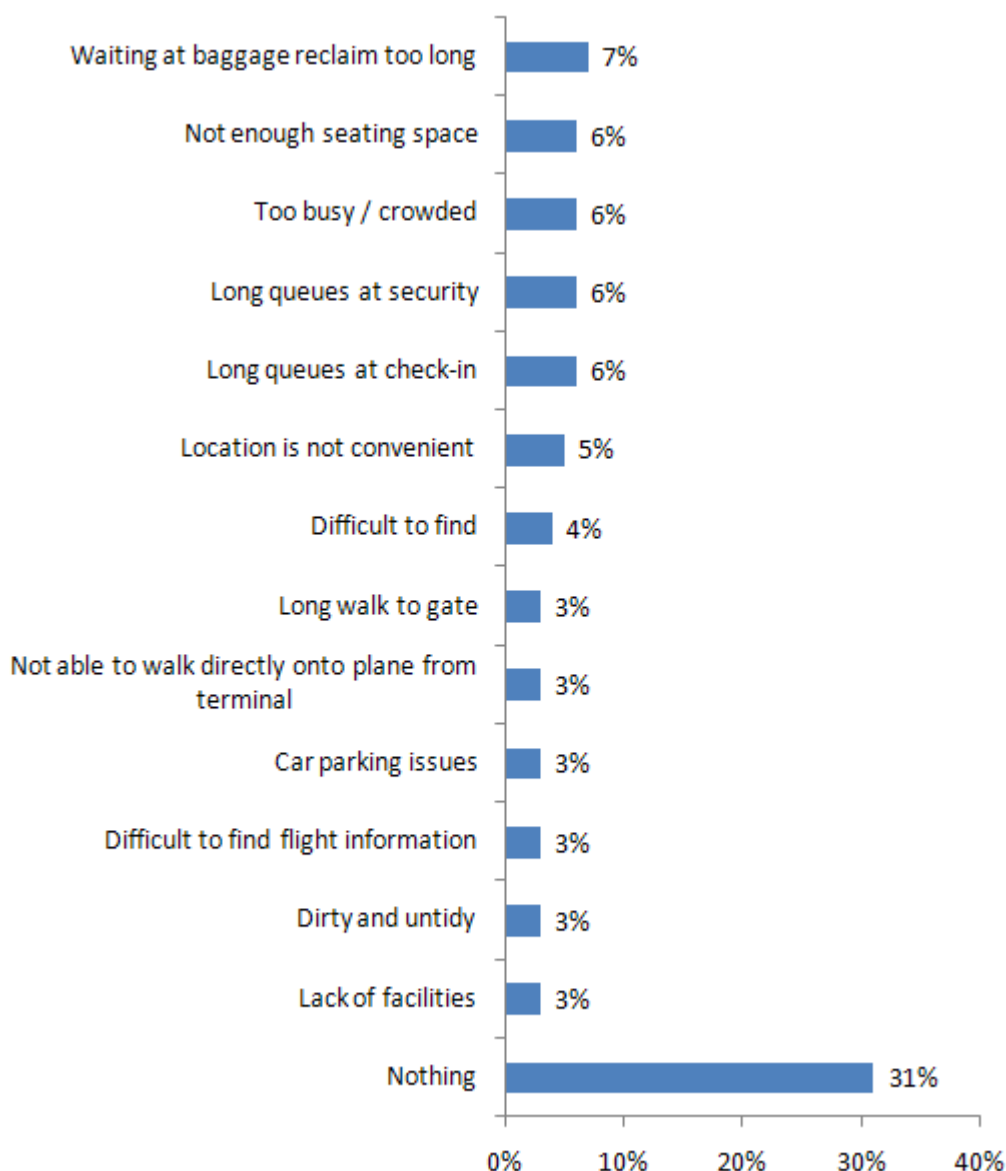


Base: all respondents (1619)

9.2 Airports' worst features

About a third of respondents said that there were no aspects of their airport experience that they disliked. Most common negative features were waiting at baggage reclaim too long (7%), not enough seating space (6%), too busy / crowded (6%), long queues at either security or check-in (6% both).

Figure 9.2 Airports' worst features

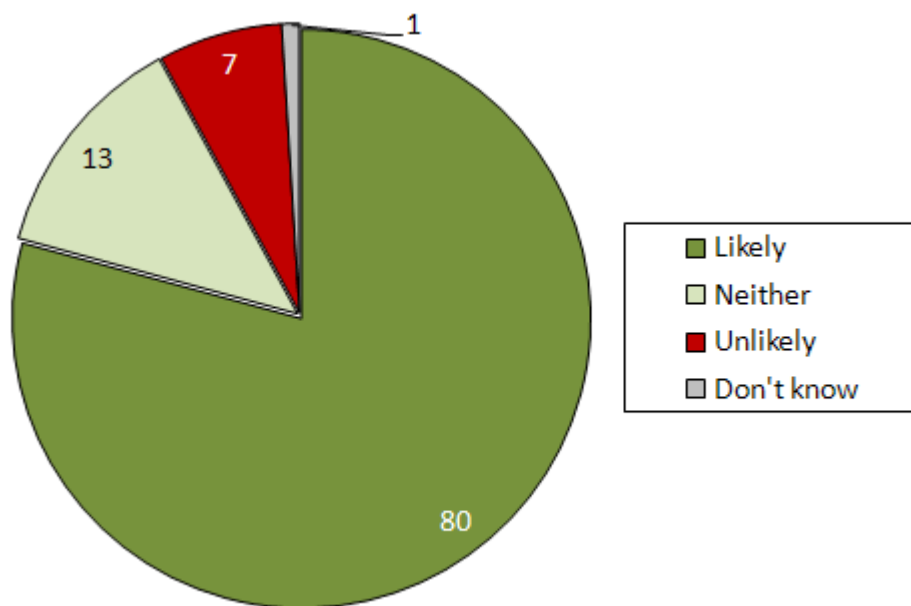


Base: all respondents (1619)

9.3 Advocacy of airport

Four fifths of respondents (80%) would recommend the airport to a friend based on their experience; only 6% would not.

Figure 9.3 Advocacy of airport



Base: all respondents (1619)

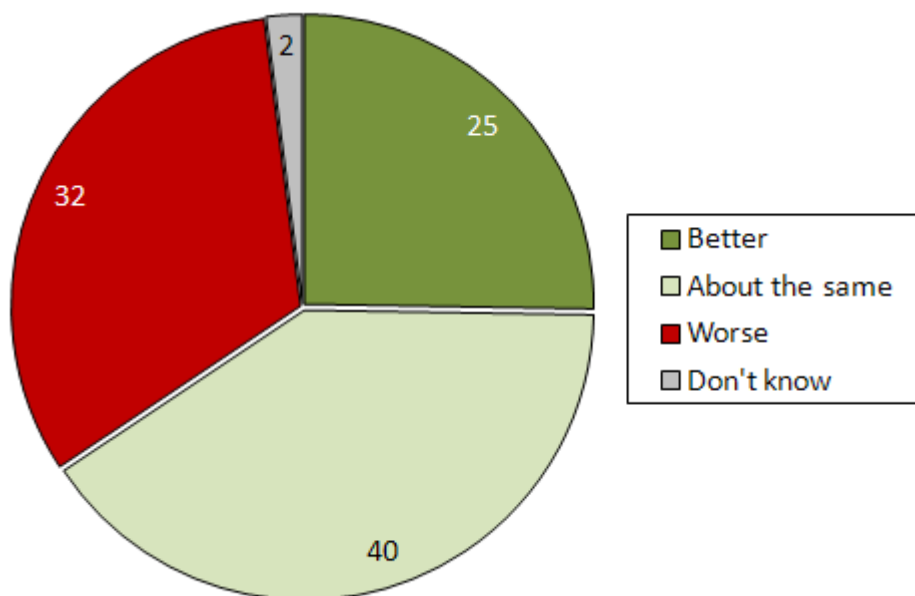
- Respondents who had used Stansted or Manchester airports were more likely than those who had used Heathrow Airport to say that they would recommend it to a friend (84% and 82% vs. 74%).
- Those who were flying for leisure purposes were more likely than those flying for business to recommend their airport (82% vs. 74%).
- Those who waited longer than 20 minutes for their luggage were less likely than all other respondents with checked in luggage to recommend their airport (71% vs. 82%).
- Respondents who had travelled on six or more air-trips this year were less likely than all others to recommend their airport (74%; 1 trip, 86%; 2-5, 83%).
- Those with a positive pre-departure experience were more likely than those with a negative experience to recommend (87% vs. 55%). Similarly, those with a positive arrival experience were more likely than those with a negative experience to recommend (87% vs. 52%).

- Respondents with a household income of less than £30,000 were the most likely to recommend (89% compared with £30,000→£50,000, 81%; £50,000→£75,000, 77%; and £75,000+, 73%).

9.4 Experience at destination airport

To gain a greater understanding of the service that passengers received, respondents were asked to compare the service they received at Gatwick, Heathrow, Manchester and Stansted airports with the service received at their destination airport. Respondents were divided between whether it was better or worse than expected.

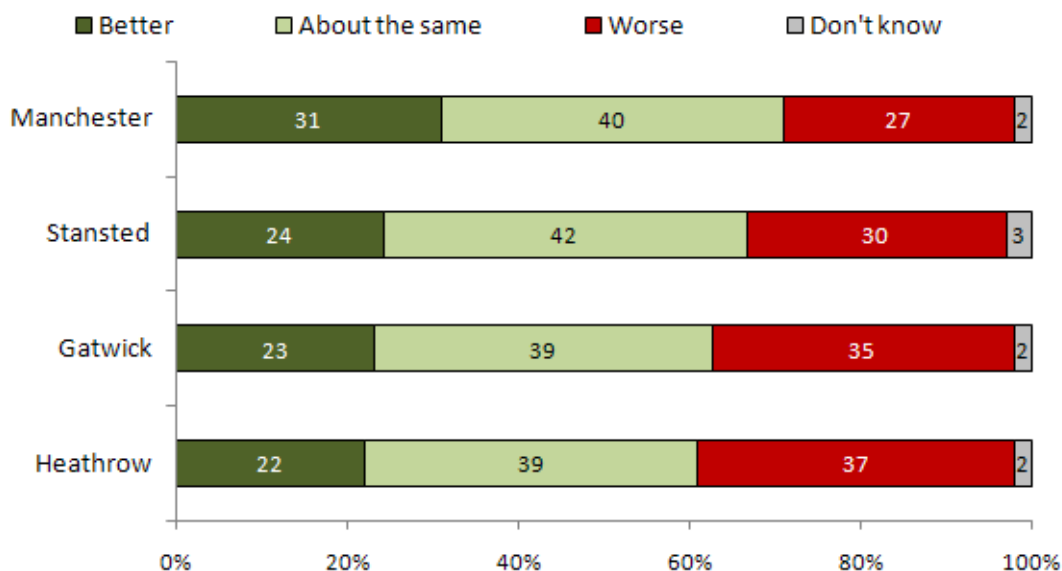
Figure 9.4 Experience at destination airport



Base: all respondents (1619)

Respondents who had used Manchester Airport were more likely than those who used any of the other airports to think that their destination provided a better airport experience (31% vs. all others, 23%). A full breakdown by the airport used is given in Figure 9.5.

Figure 9.5 Experience at destination analysed by airport used

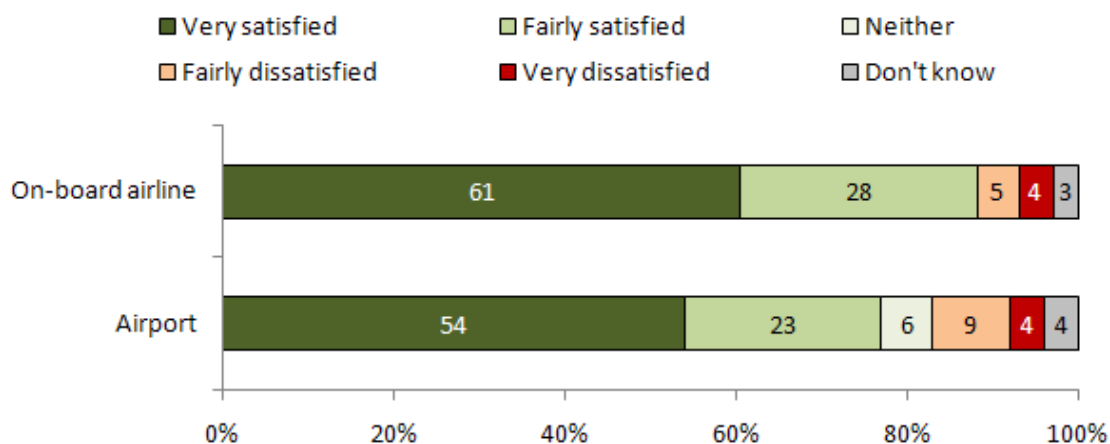


Base: all respondents (Manchester, 446; Stansted, 401; Gatwick, 401; Heathrow, 371)

9.5 Accessibility

The five percent of respondents travelling with anyone who needed assistance because of a disability were asked how satisfied they were with the assistance given both at the airport and once on board their flight. Encouragingly, most were satisfied with the assistance at both the airport (77%) and when on board the airline (89%).

Figure 9.6 Accessibility



Base: all respondents travelling with someone with disability needing assistance (79)

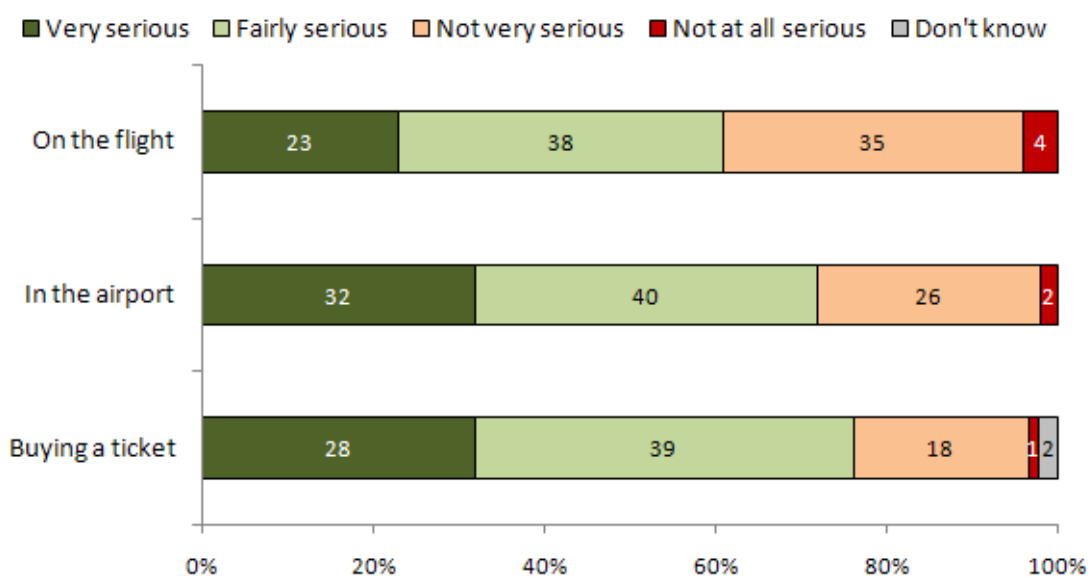
10 Previous experiences of flights

This section of the report focuses on respondents' previous flight experiences, looking in particular at any previous problems they may have had and their awareness of their rights as an air passenger.

10.1 Previous problems with flights

Two-thirds of respondents have not experienced any problems with their flights in the past three years; however, 23% have had a problem at the airport, 14% on their flight and 5% with buying a ticket. Most of those who reported that they had a problem viewed it as either very serious or fairly serious – particularly problems experienced when buying a ticket or at the airport.

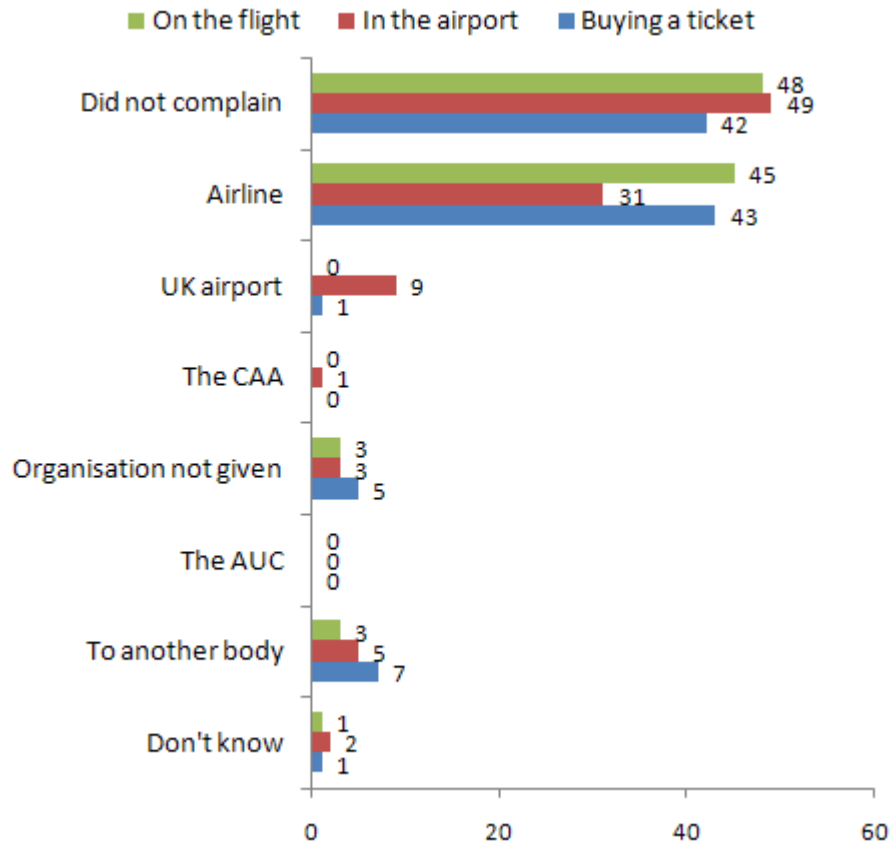
Figure 10.1 Seriousness of problem



Base: all who had experienced a problem (on the flight, 232; an the airport, 373; buying a ticket, 83)

The different locations of a problem made little difference to whether a person went on to make a complaint. Between 49% and 51% of those with a problem went on to make a complaint, generally to the airline.

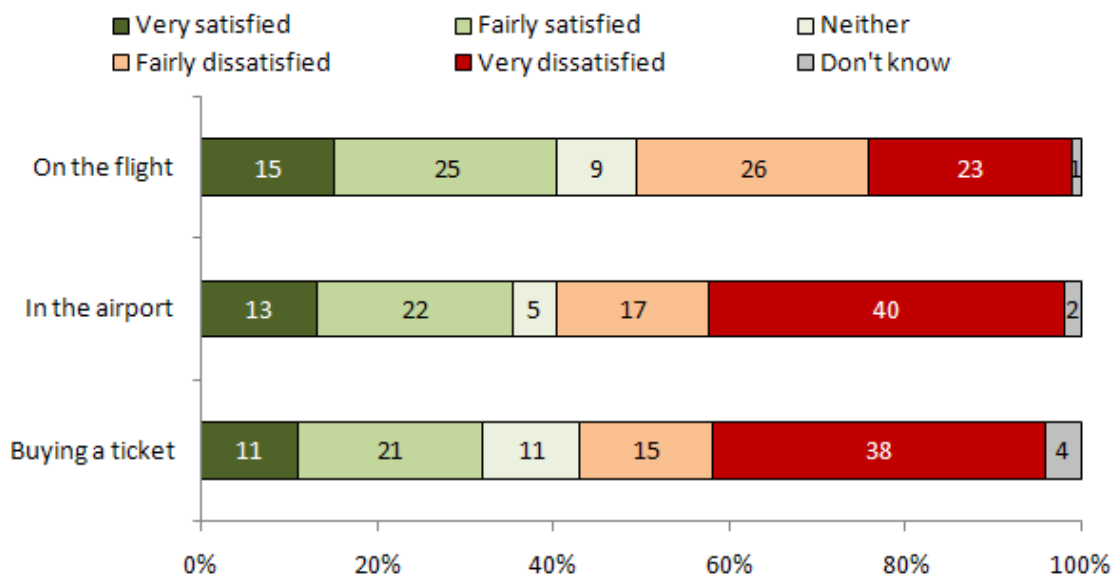
Figure 10.2 Where the complaint was made to (%)



Base: all who had experienced a problem (on the flight, 232; at the airport, 373; buying a ticket, 83)

Generally respondents had mixed opinions over how their complaint was handled, with a substantial proportion very dissatisfied (see Figure 10.3).

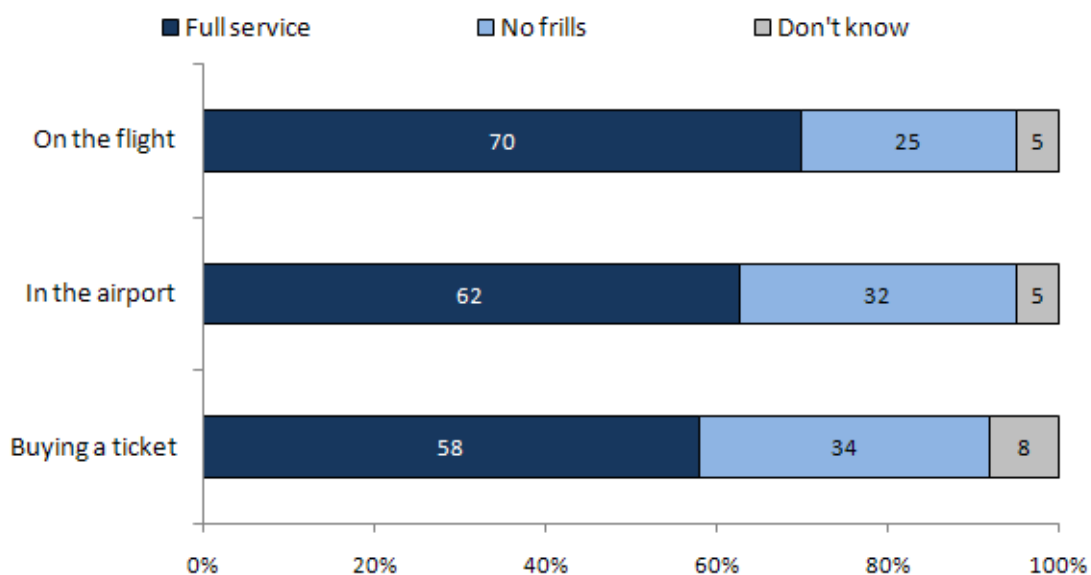
Figure 10.3 Satisfaction with how the complaint was handled



Base: all respondents who made a complaint (on the flight, 118; at the airport, 183; buying a ticket, 47)

Most problems that respondents experienced were with full service airlines, with between 58% and 70% experienced when travelling with a full service airline.

Figure 10.4 Type of airline



Base: all who had experienced a problem (on the flight, 232; at the airport, 373; buying a ticket, 83)

Depending on the circumstances, European law requires airlines to provide passengers whose flights are cancelled at short notice, who are denied boarding or subjected to long delays, with assistance such as refreshments and, if appropriate, accommodation. In certain circumstances passengers who are denied boarding or whose flights are cancelled may also be entitled to financial compensation. Respondents were roughly split in half between those who knew their rights (53%) and those who did not (47%). The Air Transport Users Council (AUC) is the UK's consumer council for air travellers but less than a quarter of respondents have heard of it.

11 Conclusion

The overall experience of air travellers was generally positive; most were satisfied with their ticket-buying, departure, in-flight and arrival experience. Furthermore, they largely found their experience was at least as good as expected.

Departure experience

The drivers of respondents' perceptions of the departure experience were the ease of time to get from the boarding gate onto the plane, information provided about flight times and departure gates (including information on delays), cleanliness and maintenance of airport facilities, and ease of getting around the airport. It was encouraging that all these areas were performing relatively well and that the areas that were performing less well had a lower impact on satisfaction. However, Stansted Airport passengers were consistently less satisfied with aspects of their departure experience than passengers at the other airports.

In-flight experience

Similarly important, the areas that were performing well in the in-flight experience were the areas that had a high impact on passengers' overall experience (namely welcome and presence of cabin crew and the condition and cleanliness of the cabin interior). Furthermore, the areas that were performing less well were the areas that did not have the greatest impact on satisfaction (ability to sleep, and quality of refreshments).

However, it is important to note that different groups of respondents have different demands of their in-flight service. Those who were on a long-haul flight were more likely to consider that aspects of their in-flight service had a major impact on their overall experience. This may be because they spend longer on the flight so more aspects become important; there was certainly a greater propensity to suggest that in-flight entertainment and the ability to sleep would have a major impact on their overall experience.

Arrival experience

The amount of time that passengers had to wait exceeded their minimum expectations at check-in, security and passport control. The new CAA-monitored service standards that came into effect at Heathrow will require substantial service improvement. The standards require security queuing times of less than 10 minutes at Heathrow for 99% of the time and at Gatwick for 98% of the time. This research found that current performance is meeting the standard on 77% of occasions.

Overall experience

Passengers' expectations were generally met on both airport and in-flight experience. Although while buying the ticket passengers suggested that the service quality was not a major consideration in their ticket buying, the results of this research show that passengers are concerned with service quality when they actually travel. The pre-departure, in-flight and arrival experience that the passenger receives is influenced by the service that the airlines and airport authority provides.

This research showed some areas that passengers rated less highly than others and may not be working as well as they potentially could.

- Comparing service quality standards: although one of the main reasons passengers chose a flight that was not the cheapest was that they wanted a superior airline service quality, only 35% of respondents thought that it was easy to compare service quality when buying their ticket.
- Customer service at airport: staff helpfulness and availability at the airport was rated poorly by respondents. This is especially interesting given that in the in-flight experience the customer service of passengers was so important.
- Arrival experience: respondents were less satisfied with their experience in this part of their journey than the other aspects. This is particularly true of luggage reclaim; this was not only rated relatively poorly but also was most commonly selected as a negative part of the journey.
- Awareness of consumer rights: only half of respondents were aware of their rights as a passenger in the event of delays or cancellation. Even fewer were aware of the UK's consumer council for air travellers (the Air Transport Users Council).
- Complaints handling: a high proportion of respondents (who had made a complaint) were not satisfied with how it had been handled.

Rising expectations of airports make it important to match and analyse the survey data with internal performance data to examine how airports will meet future challenges.