Civil Aviation Authority

Consumer Tracker for the Aviation Sector

Wave Two, Final Report: December 2016

Ipsos Loyalty

Contents

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Background and Methodology

Executive Summary

Headline Measures

Flying Behaviour

Recent flying experience

Disruption and complaint handling

Experience of PRM

Flight terms and conditions and ATOL protection

Appendix

Background to the research

This is the second wave of research that the Civil Aviation Authority (CAA) commissioned Ipsos MORI, an independent research organisation, to conduct in order to develop a deeper understanding of UK consumers' flying behaviours and their attitudes towards the aviation industry. This independent research, carried out in accordance with the requirements of the international quality standard for market research, will help inform the CAA's work to put consumers' interests at the heart of the way it regulates the aviation market.

The main objectives of this research are to:

- Understand flying behaviours and attitudes towards flying, including barriers for non-flyers and priorities for choosing future flights
- Understand perceptions of the aviation industry in terms of levels of safety, choice, value and fair treatment, environmental performance and security, as aligned with CAA's four strategic objectives set out in the strategic plan for 2016-21
- Measure satisfaction with the flying experience
- Understand awareness of rights in the aviation sector among UK consumers

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Methodology

- In this second wave of research, we have continued to use the same methodology as the first wave, in order to understand how behaviour and attitudes changes over time.
- A total of 3,551 interviews were conducted with a nationally representative sample between 14th September and 3rd October 2016. 3,051 interviews were conducted online and 500 were conducted over the telephone.
- This mixed methodology approach was adopted to make the survey as inclusive as possible. Conducting the survey by telephone meant it was possible to capture those that are not online and conducting an online survey enabled us to interview certain groups that tend to be more difficult to reach by telephone (e.g. younger males).
- For the online interviews, participants were recruited from Ipsos' online panel. For the telephone interviews, these were predominantly conducted through a random digit dialling approach, but some targeted sample was also included.
- To ensure the sample was nationally representative, interview quotas were set to reflect the UK adult population in terms of gender, age, region and working status. Where the final number of interviews did not exactly match quotas, weighting was then applied to the final data according to these criteria.
- The questionnaire was designed to average 12 minutes online and 15 minutes by telephone. To keep the telephone interview length to a minimum, some questions were only asked on the online survey and not the telephone survey. This is highlighted in this report where this is the case.
- This research has been conducted in accordance with Ipsos MORI's standards and accreditations (see the appendix to this report).

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Analysis

- A large sample size was used overall for this study to allow for sub-analysis by key groups. Key subgroups in the report are:
    - **Recent flyers,** defined as those who have flown within the 12 months before the research (unless otherwise stated).
    - **PRM (Persons of Reduced Mobility),** defined as those who have a disability or health condition that limits their day to day activity.
        - Physical condition; something that affects your movement, balance, vision or hearing etc.
        - Non-physical; something that affects your thinking, remembering, learning, communication, mental health or social relationships.
- Throughout this report only differences that are statistically significant to the 95% confidence level have been commented upon. If a result is statistically significant if it is unlikely to have occurred by chance and it simply means there is statistical evidence of a difference between two figures; it does not mean the difference is necessarily large, important or significant in the common meaning of the word.
- Where we have identified a significant change between the wave 1 (Feb/Mar 2016) data and this current Wave 2 (Sept/Oct 2016) data this is indicated. A green arrow shows a significant increase ▲ and a red downward arrow shows a significant decline ▼.

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Weighting scheme

Quotas were set on the survey, based on 2011 UK Census information. At the analysis stage, small scale weighting was applied to the overall sample to address any small discrepancies in the achievement of the quotas.

Category	Sub-category	Weighted proportion	Unweighted proportion
Gender	Male	49%	49%
	Female	51%	51%
Age	18 – 24	12%	12%
	25 – 34	17%	16%
	35 – 44	18%	18%
	45 – 54	18%	18%
	55 – 64	15%	16%
	65 +	21%	21%
Working status	Working Full Time	41%	42%
	Working Part Time	17%	17%
	Not Working	42%	41%

Category	Sub-category	Weighted proportion	Unweighted proportion
Region	North East	4%	4%
	Yorkshire & Humber	8%	8%
	North West	11%	11%
	East Midlands	7%	8%
	West Midlands	9%	9%
	London	13%	13%
	South East	14%	14%
	Eastern	9%	10%
	South West	8%	9%
	Wales	5%	5%
	Scotland	8%	8%
	Northern Ireland	3%	3%

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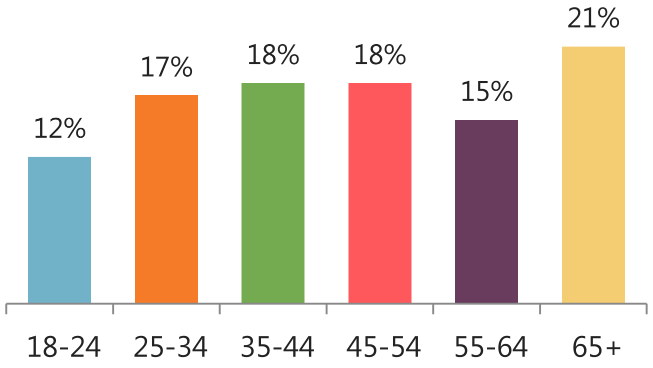
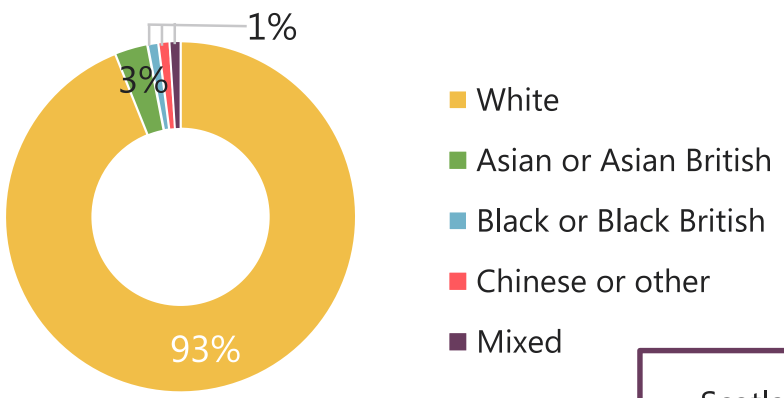
Demographic (weighted) sample profile

Gender

Age

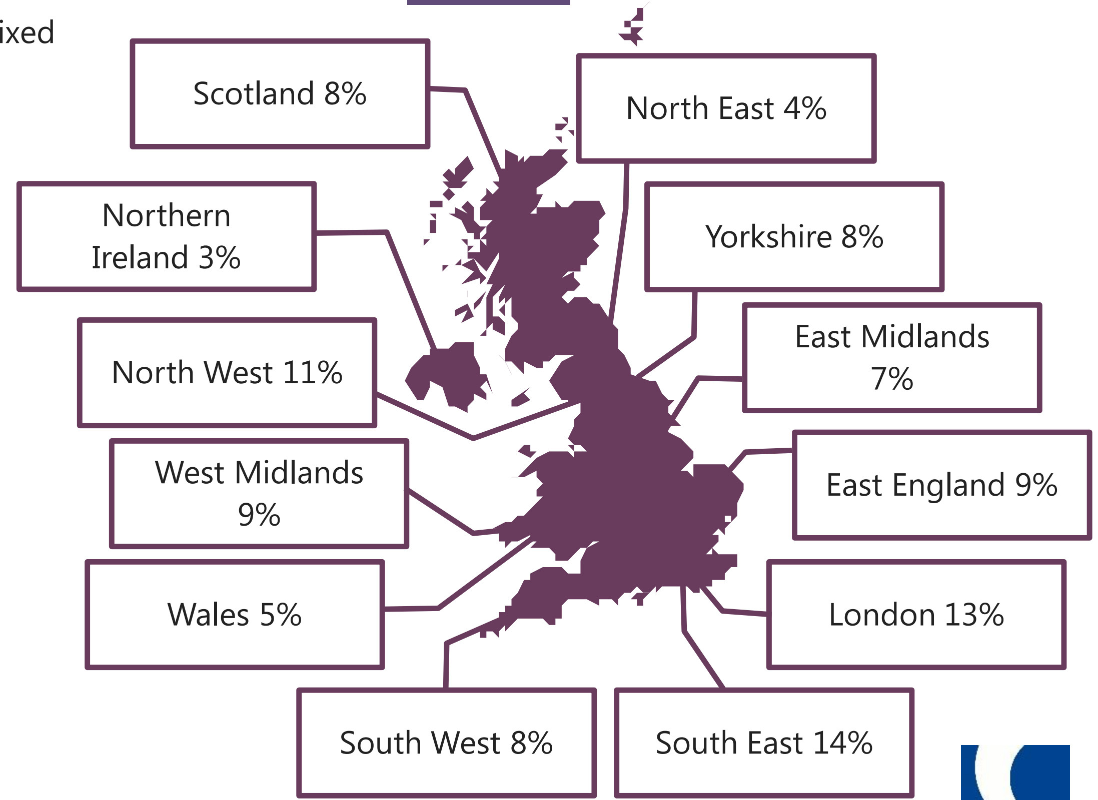


Ethnicity



91% of those interviewed by phone have internet access

Regions



Working Status

Employed full time (30+ hours per week)	41%
Employed part time (8-29 hours per week)	15%
Employed part time (under 8 hours per week)	2%
Not working	8%
Retired	21%
Housewife/househusband	9%
Student/full time education	5%

Household Income

Up to £14,999	15%
£15,000-24,499	18%
£25,000-39,999	23%
£40,000-74,999	23%
£75,000 or more	7%

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Q1. Gender, Q2. Age, Q3. Working status, Q4. Region, Q130. Ethnicity, Q131. Household income, Base: all participants (3551), Q132. Do you have internet at home? Base: all telephone participants (500)

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Executive Summary

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Executive summary: headlines

UK air travel behaviour remains very stable; just over half of UK consumers have flown in the last year (55%), and only a small proportion (6%) have never flown. Two thirds of recent flyers have taken 1 or 2 flights in the last year, the main purpose being to take a holiday (87%). The main barrier to flying is cost, cited by 42% of non-recent flyers.

Enjoyment Consistent with last wave, over half of UK consumers enjoy flying. There is a notable proportion that disagree. Intuitively, recent flyers are more likely to agree. PRMs (who have a smaller proportion of recent flyers) are less likely to agree. Interestingly, and throughout the survey, PRMs who find air travel difficult but do not feel that they require assistance tend to be amongst the least positive in terms of attitude towards flying and when rating their experience.

Security & Safety Over three quarters (76%) of UK consumers remain confident in the safety of UK airlines, rising to 85% amongst recent flyers; increased exposure to the experience appearing to provide reassurance. For the minority that disagree that the balance of security screening and convenience is right, over half feel that there is too much focus on security.

Consumer Confidence There is continued confidence that consumers will get the service that they paid for. This wave, those travelling in Premium Economy (77%, 75% in wave 1) are more likely to agree with this that those travelling in Business cabin class (60%, also 75% in wave 1). PRMs express greater disagreement in this area of value and fair treatment.

Consumer Choice Half of respondents continue to agree that it is easy to understand and make price comparisons one fifth do not find this process easy. A similar proportion are content with sourcing other important information. PRMs feel more challenged with agreement levels reduced to two fifths for both measures.

Environment Environmental consideration remains relatively low, at around one fifth claiming to think about this when booking a flight. Those booking directly with the airline are more likely to think about the environment, and flyers with certain airlines seem to be more conscious of environmental issues.

Travel experience

8 in 10 recent flyers booked their most recent flight online, and half booked directly with the airline. Most travelled in standard cabin class (93%). Gatwick, Manchester and Heathrow are the most commonly used airports. Easyjet (21%), British Airways (16%) and Ryanair (13%) are the most commonly used airlines.

Overall

- Overall satisfaction with the most recent travel experience remains high (88%).
- Satisfaction across all measured elements of the flight experience is largely consistent with wave 1 findings, with just a few exceptions:

Information and choice

- There has been a significant improvement for satisfaction with airport choice; this is accompanied by a marginal increase in ease of information sourcing to allow choice comparison. However, this does not extend to airline choice where satisfaction has fallen slightly, and the flight decision itself is also viewed less favourably this wave.

Cabin class

- There is a more marked distinction between flight perceptions of those flying in standard and premium cabin class; with the former significantly more satisfied across a number of touchpoints including; value, airport navigation and transfers.

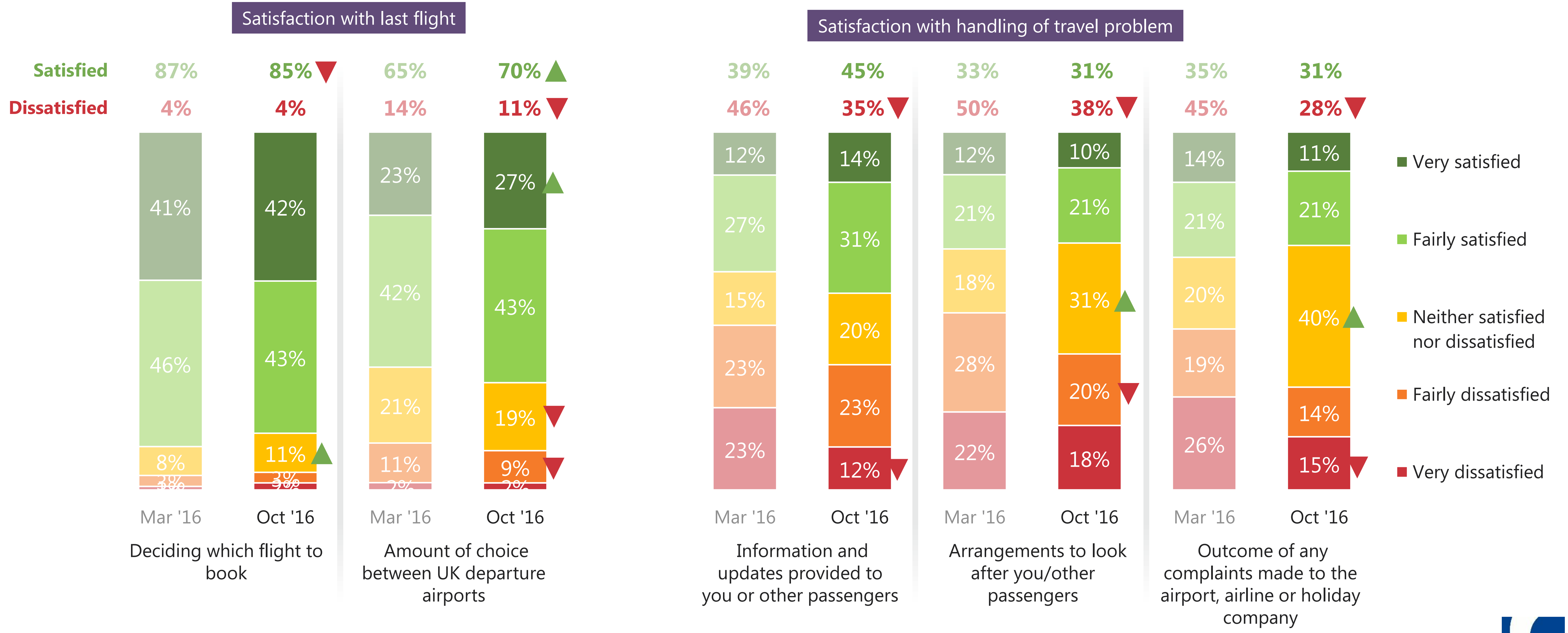
Dissatisfaction

- Levels of dissatisfaction remain relatively low across the journey, choice and complaint handling are the more challenging areas. That said, there has been an increase in satisfaction and a decrease in dissatisfaction with the choice between UK departure airports since wave 1.

	Satisfied	Dis-satisfied
Process of booking the flight	89%	4%
Finding way to gate	89%	4%
Ease of finding way around airport in UK	88%	4%
Information about flight status at the UK airport	86%	4%
Deciding which flight to book	▼85%	4%
Security at the airport in the UK	85%	6%
Travelling to/from airport in UK	84%	7%
Check-in and bag drop at airport in the UK	83%	6%
Baggage collection at the airport in the UK	82%	7%
Passport/immigration control in the UK	82%	7%
Overall airport experience	81%	9%
Overall on-board and in-flight experience	79%	8%
Ease of finding information to compare choices	79%	5%
Shop, restaurants & services at UK airport	78%	8%
Transfer/connection to another flight	77%	6%
Value for money	76%	8%
Amount of choice btw UK departure airports	▲70%	▼11%
Amount of choice between airlines	64%	13%
Handling of any complaints	58%	13%

Significant changes – travel experience

There have been some significant shifts in satisfaction compared to March 2016, including decreased dissatisfaction with disruption handling.



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Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK (1,863 - 1,958) | Q83. How satisfied or dissatisfied were you with the following aspects in terms of your flight problem? Base: All who have flown in the last 12 months and experienced any travel problem exc. DK (844)

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Disruption

Disruption

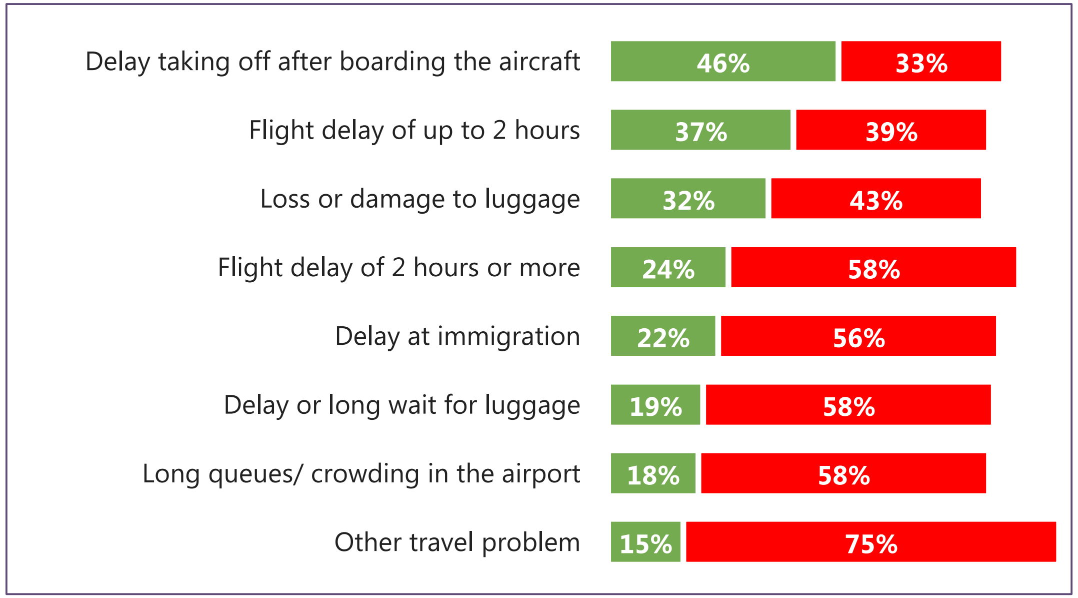
- Those who have experienced disruption give consistently lower ratings across the entire journey experience. The most commonly cited disruption is crowding and long queues at the airport, delays of up to 2 hours and delays once boarding prior to take-off.

- Satisfaction with the handling of complaints has shown a marginal improvement overall. 45% of those who had a complaint were satisfied with how helpful and friendly the people dealing with this were, this falls to 38% satisfied with information provided about progress and resolution.

- When looking at specific issues there is some variance in levels of satisfaction. Delays experienced in the airport environment yield lower satisfaction than a delay experienced on the aircraft.

- Of those who experienced a disruption just under a third (31%) were not informed of the reason for this.

- Amongst complainants, the majority (84%) did not escalate this to a third party. For those who did, half (49%) were satisfied with how this was handled.



Understanding terms and conditions

T&Cs

- Although just two fifths of those who have flown in the last 3 years claim to always read the terms and conditions, there is high awareness of baggage allowance and whether you need to provide your own boarding pass (printed or on phone).
- Awareness is notably limited when it comes to making changes to a booking; with lower levels of awareness when it comes to refunds if cancelled or if a member of the party was ill and could not travel for medical reasons and entitlements if flights are re-scheduled.

ATOL

- Around 9 in 10 (88%) recognise the importance of ATOL protection. Of those aware two thirds (64%) were certain that their last holiday was ATOL protected. 1 in 10 (11%) were certain that their last trip was not covered.
- Most recent flyers (86%) agree that ATOL protection should include protection against UK companies going bankrupt. A similar proportion (80%) think this should extend to cover non UK based companies. However, a lower proportion are willing to pay more for bankruptcy cover (68%, with 10% disagreeing that they would be willing to pay more for this).

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PRM experience

PRM profile

- Almost one in five UK consumers is a PRM (a Person of Reduced Mobility, someone who has a disability or health condition that limits their day to day activity). This does or would cause difficulties flying for half (52%) and 56% of these have a physical condition, 21% non-physical and 21% a combination of the two.

Perceptions

- PRM generally have poorer perceptions of flying than non PRM; they are less likely than non PRM to enjoy flying, to find it easy to understand cost and other information and to make comparisons, less confident in the safety and security of airports and airlines and that they would get the service paid for when flying, and less likely to agree that the balance between security and screening is right.

Barriers

- PRM are less likely than non PRM to have flown in the last 12 months (35% vs 60%) and are more likely to have never flown (10% compared to 5%). As with UK consumers overall, PRM's main barrier to flying continues to be cost and budget constraints (40%), with their health condition or disability consistently being the second most mentioned barrier (35%).

Experience

- When PRM do fly, satisfaction with the journey overall and across elements is high, though it is lower than the satisfaction of non PRM in some aspects. These include overall satisfaction with the last flight (83% of PRM are satisfied compared to 89% of non PRM), and satisfaction with the airport experience (75% vs 82%).
- When requesting assistance for the journey satisfaction is typically very high. 84% are satisfied with the assistance received overall. Satisfaction is also high across elements of the assistance.

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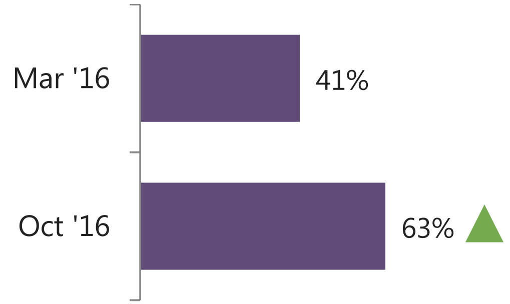
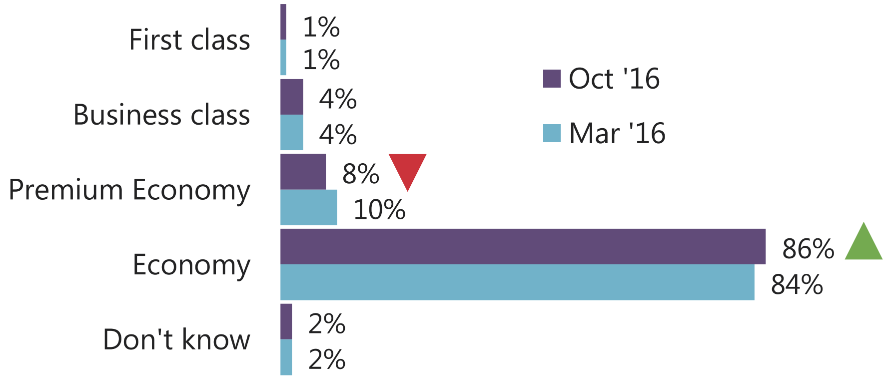
Significant changes – flyer profile

Due to seasonal differences the flyer profile changed slightly between the Spring and Autumn waves of the research

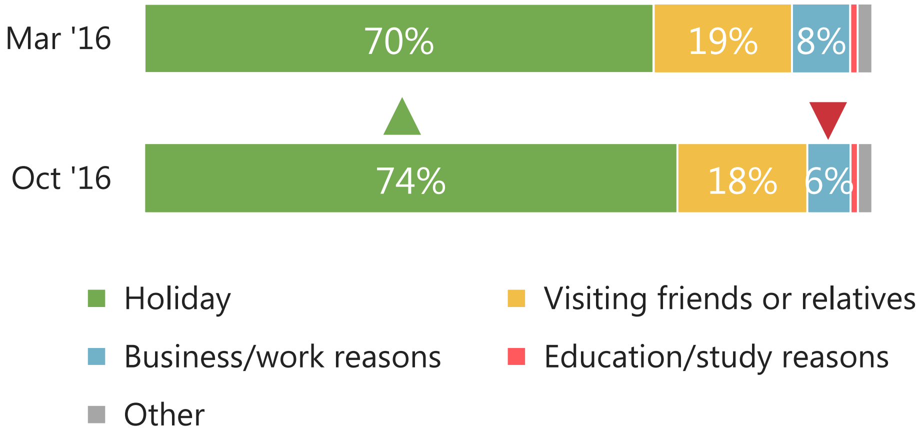
Most recent flight within last 3 months



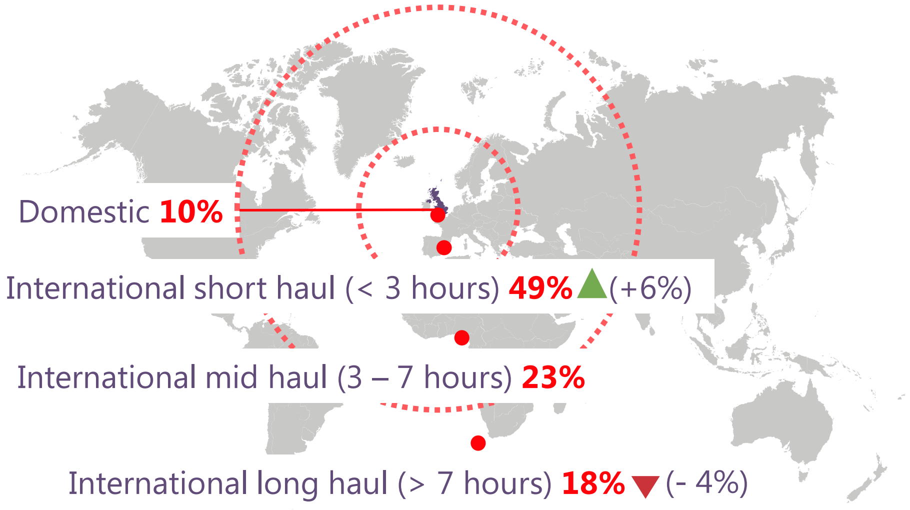
Cabin class last flight



Main flight purpose last flight



Was the flight domestic or international?



Travelling with children on last flight?

	Mar '16	Oct '16
Did not travel with children	83%	79% ▼
Travelled with children	17%	21% ▲

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Q50. Roughly, when was the last time that you flew? Q51. Was this flight domestic or international? If international, how long was the flying time? Q52. What was the main reason for your last flight? Q54. Which cabin class did you travel in for your last flight? Q55. If you travelled with children on this occasion, what age were the children? Base: All who have flown in the last 12 months (1,965)

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Headline measures

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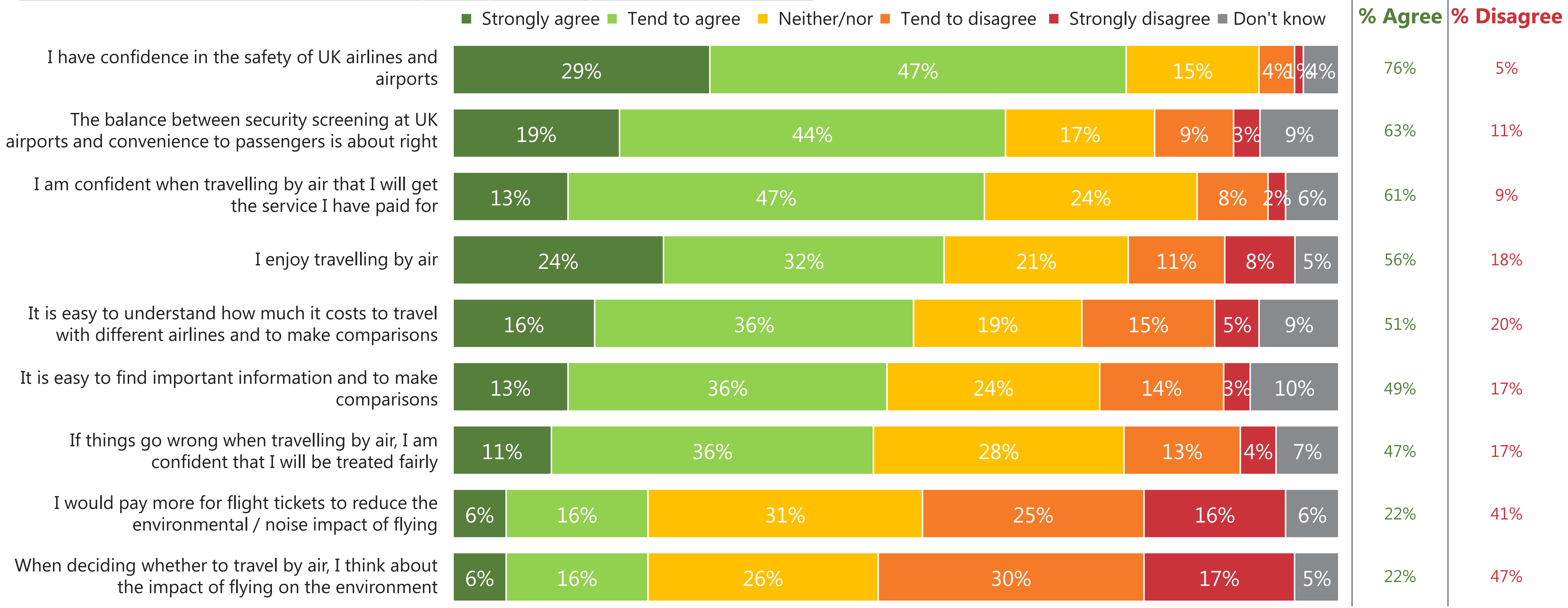
Headline Measures: Overall

Three quarters of UK consumers are confident in the safety of UK airlines and airports, environmental consideration is limited to around one fifth of consumers. Results are typically unchanged from last wave.



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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3551)

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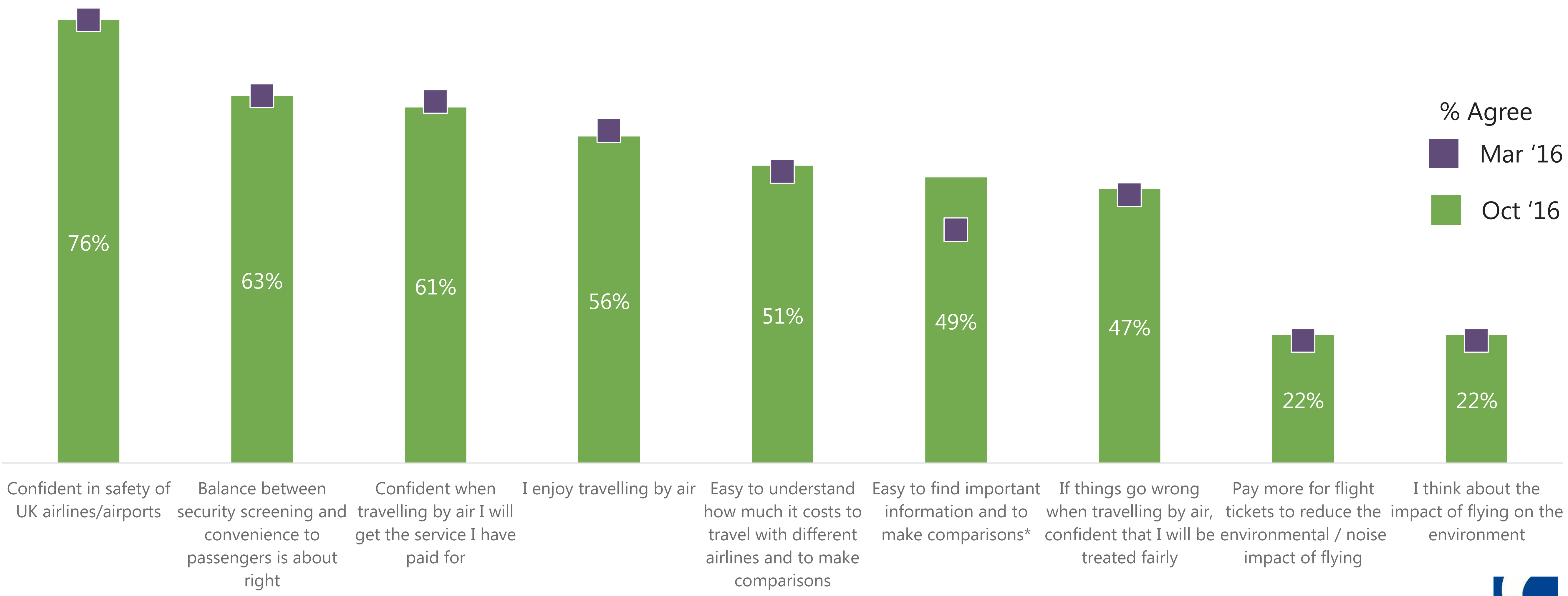
Headline trends

Opinion across the headline measures remains consistent with last wave. Where there is a change in how easy it is to find important information, this is due to a questionnaire wording change.



Ipsos Loyalty

Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3551)
*Question text changed, removed reference to 'non fares related' information.

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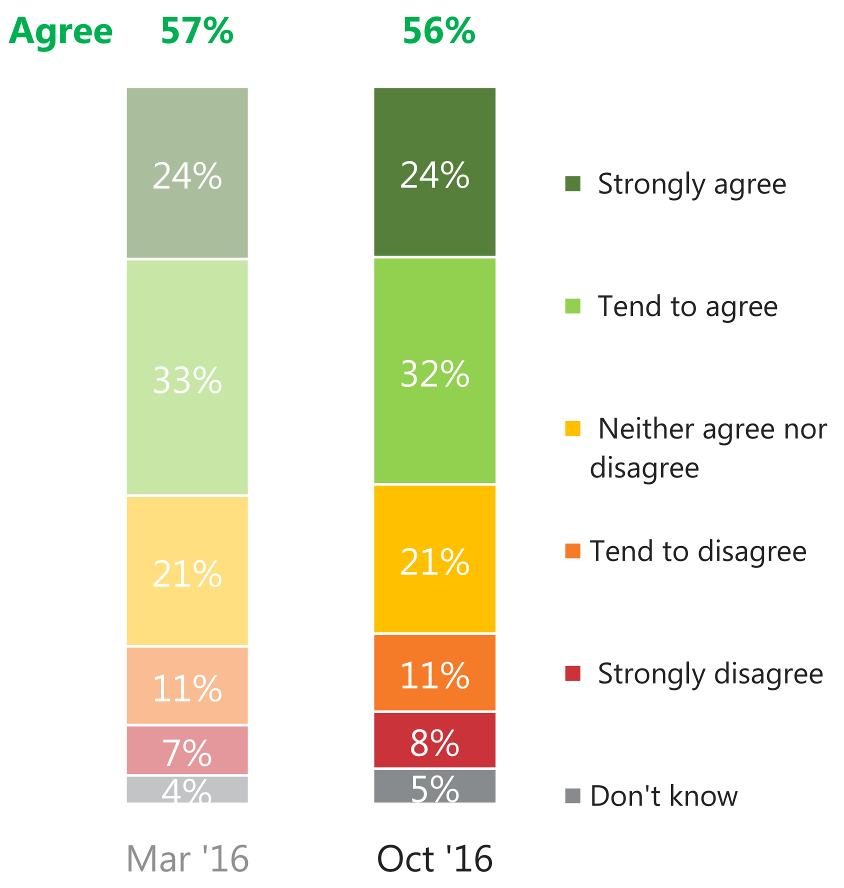
Headline Measures: Overall

Over half of UK consumers enjoy travelling by air, and almost one quarter strongly agree that they enjoy flying. However, a sizeable minority of 18% do not enjoy travelling by air.



I enjoy travelling by air

- Those who have flown more recently are more likely to agree that they enjoy travelling by air. The more recent the flight experience, the higher the level of agreement is. Of those who have flown in last flown 3 months, 68% agree, compared to 36% of those who last flew 10 years or more ago.
- PRMs are less likely to enjoy travelling by air (48% agree, compared to 58% of non-PRMs), this is amplified amongst those classifying themselves as having a non-physical condition (45% agree). Interestingly those with difficulty but not requiring assistance are even less likely to enjoy the experience (32% agree).

PRM

- Agreement is inflated amongst those whose most recent experience was in premium economy (75% agree) but there is no significant difference between those who flew in a premium class and those flying in economy (65% and 66% agree respectively)

Premium economy

- This wave some regional differences are apparent; with those resident in Northern Ireland more likely to agree (66%) and those in the South West less likely to agree (50%). Consumers with a lower household income are also less likely to enjoy the experience, which is correlated with lower frequency and less recent experience of a flight.

Demographics

- Last wave, we had seen that those travelling with children were more likely to strongly disagree that they enjoy travelling by air than those travelling without children (9% compared to 4%), however, this is not the case this wave and those travelling with children are actually amongst the most positive (70% agree with the statement compared to 65% of those without children).

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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3551)

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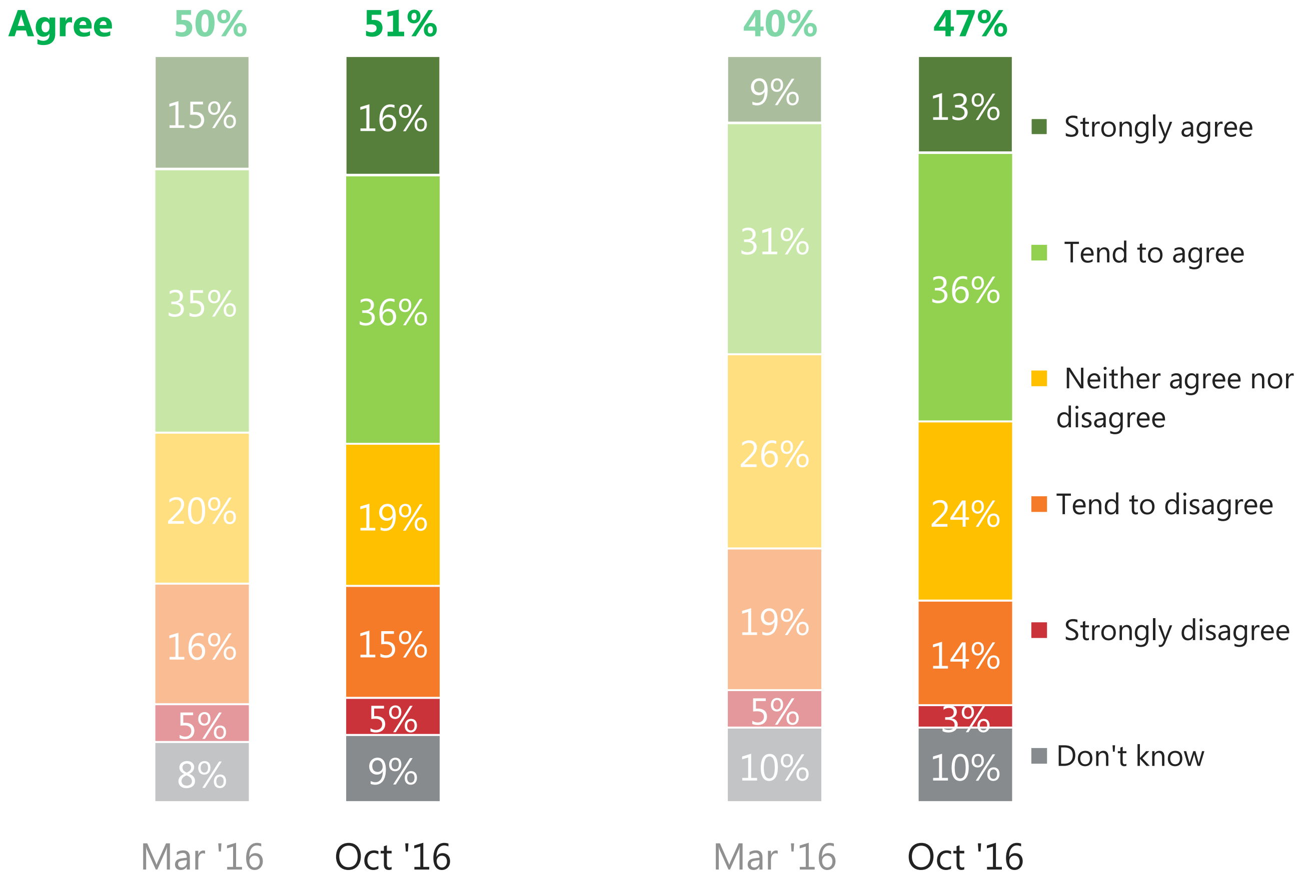
Headline Measures: Consumer Choice

When searching for flights, half of UK consumers find it easy to understand and compare costs of travelling with different airlines, a similar proportion find gathering other information easy.

**Change in questionnaire wording*



It is easy to understand how much it costs to travel with different airlines and to make comparisons

It is easy to find other important information and to make comparisons*

- Recent and frequent flyers are most likely to agree that they can find and compare information when booking a flight. Of those taking two or three flights in the last year, 66% find price comparison easy, rising to 74% of those who have flown four times or more.
- PRMs find sourcing information more difficult than non-PRMs. Only 41% agree that it is easy to understand and compare the cost of flying, compared to 54% of non-PRMs. Finding other important information is also an issue, with only 40% agreeing that this is easy compared to 51% of non-PRMs. **PRM**
- Booking channel significantly influences how easy it is to gather information. 64% of those who booked their last flight online agree that price comparison is easy compared to 55% of those who booked face to face. Further to this 61% of online bookers find other information sourcing easy.
- Those who book with travel agents and directly with airlines are more likely to find it is easy to compare and understand costs, with 64% and 66% agreeing with this statement respectively. Those booking directly with the airline also agree that other information is easy to source (62% agreeing). **Booking method**
- Those flying in premium cabin class are also more likely to express ease in sourcing other information (70% agree vs economy 58% agree). **Cabin class**
- Around quarter of those aged 45 and over find it difficult to understand and compare prices between flights, compared to just 13% of 18-24s and 16% of those in the 25-34 age group. **Age**

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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3551) *Question text changed, removed reference to 'non fares related' information.

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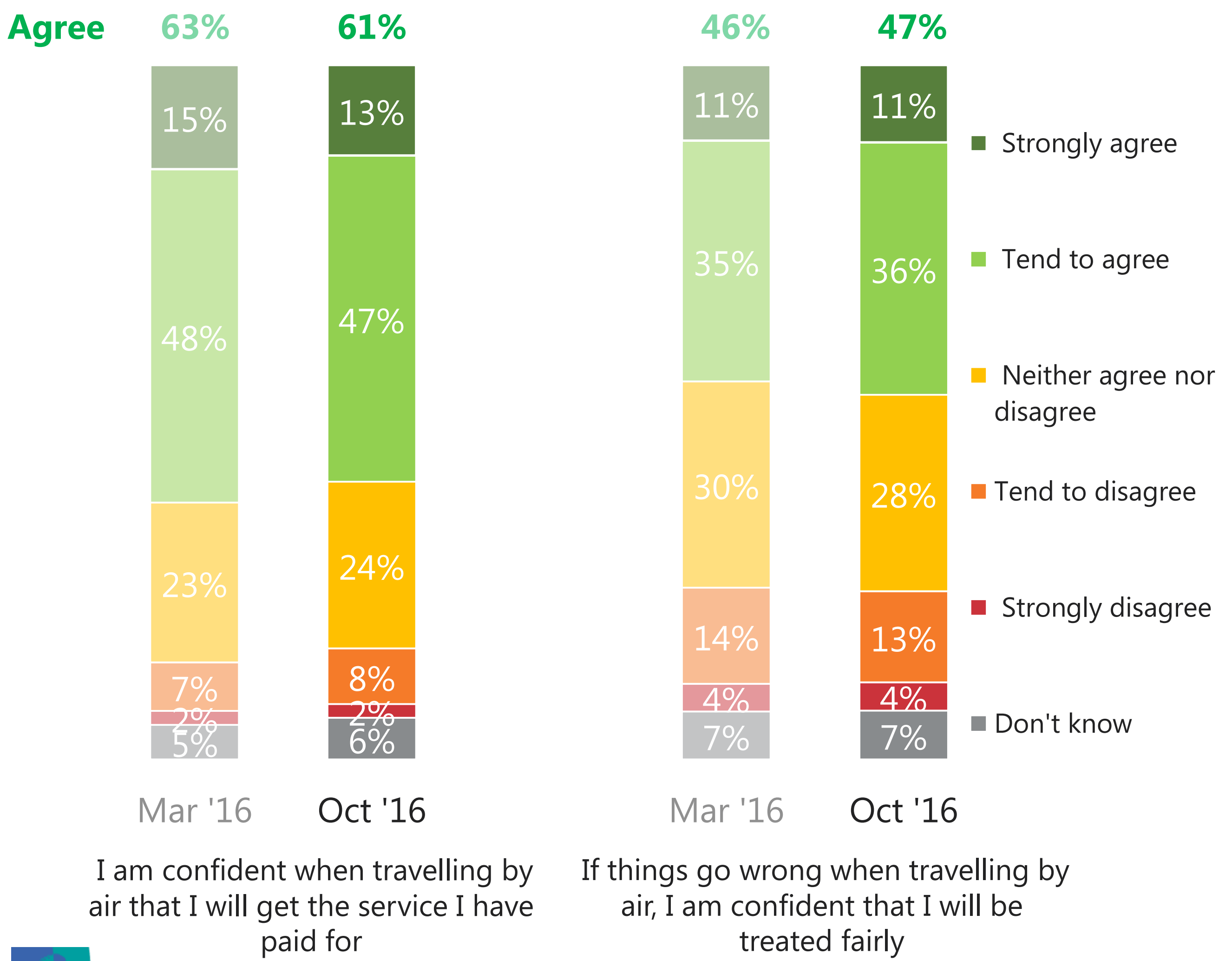
Headline Measures: Consumer Confidence

UK consumers are generally confident that they will get what they pay for when they book, but are less confident that they will be treated fairly if things go wrong.



- Recent flyers are more likely to be confident that they will get the service paid for and will be treated fairly in the event of something going wrong. Those with no flight experiences have limited knowledge: 57% of this group don't know if flyers will get the service they pay for, and 48% don't know if they will be treated fairly.
- PRMs are more concerned that they will not receive value for money, with only half (52%) confident that they will get the service they have paid for. This drops slightly to 49% amongst those with travel difficulties. Amongst those with travel difficulties who do not require assistance, only 37% agree that they will get the service they have paid for.
- This is mirrored to some extent for perceptions of fair treatment. Agreement falls to 37% amongst those citing difficulty with air travel and further still for those who do not require assistance (30% agree). However, agreement with this statement is closer between PRMs overall and non-PRMs, 44% and 48% respectively.

PRM

- This wave there is a difference between standard and premium cabin class flyers. The former are more confident that they will get what they paid for, with 70% in agreement compared to 63% of those whose last flight was in a premium class. However, premium class flyers are more likely to agree that treatment will be fair if something goes wrong (60% agree, compared to 52% of Economy flyers).

Cabin class

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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3551)

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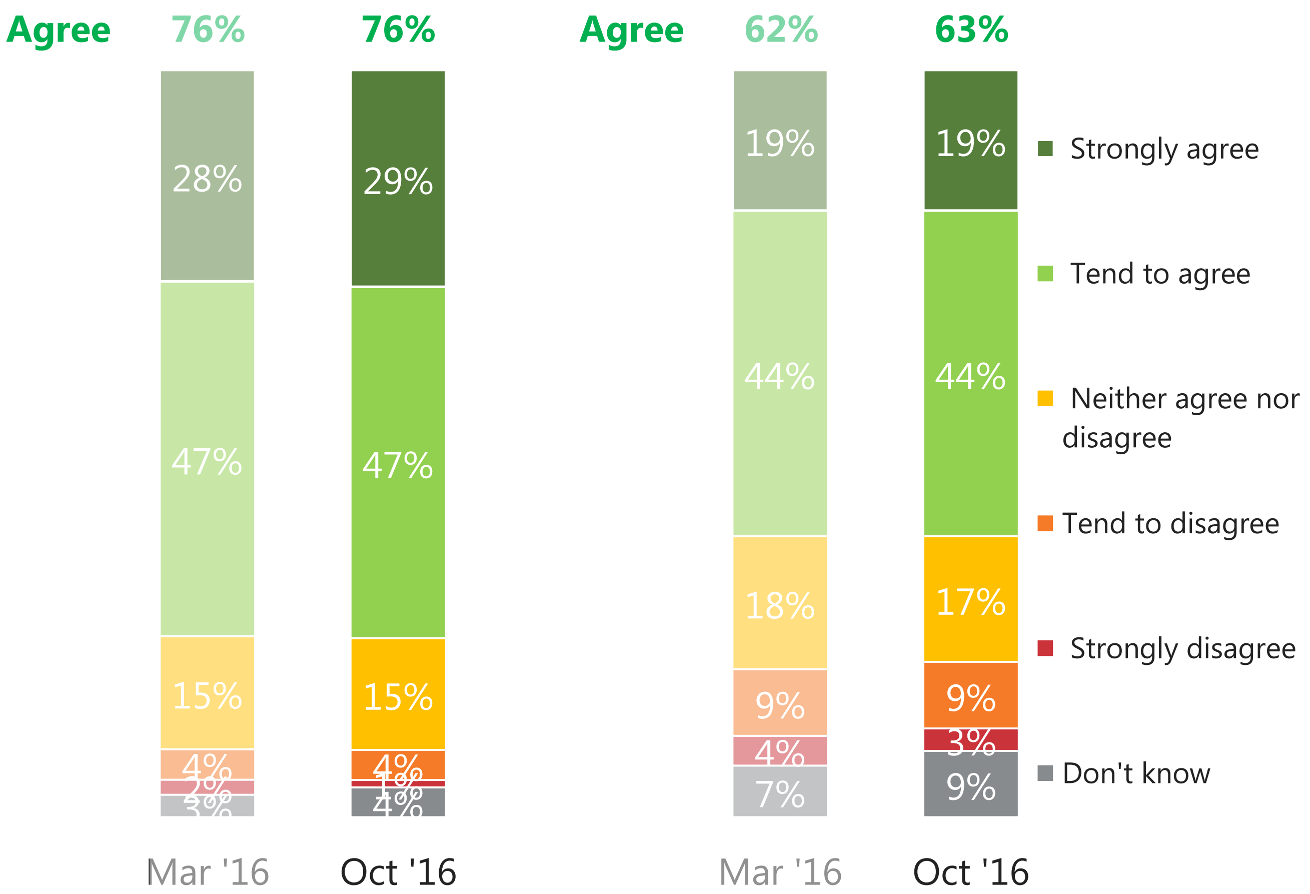
Headline Measures: Security and Safety

Confidence in the safety of UK airlines and airports remains the highest rated headline measure. Three quarters of UK consumers are confident in the safety of the aviation sector.



I have confidence in the safety of UK airlines and airports

The balance between security screening at UK airports and convenience to passengers is about right

- The safety of the aviation sector in the UK is widely trusted, particularly amongst recent flyers. 85% of recent flyers are confident in safety and 73% are happy with the balance between security and convenience.
- Men are more likely to have faith in levels of safety with 79% agreeing compared to 72% of women. However, they are more likely to disagree that the balance between screening and convenience is right (13% vs 9% of women).

Gender

- Confidence in the safety of airports is broadly similar across all age groups, but the 18-24 age group is most accepting of the balance between security and convenience at UK airports. 68% agree that the balance is about right, and only 6% disagree that it is not.

Age

- Only 67% of PRMs are confident that UK airlines and airports are safe. For those with a non-physical condition this falls to 62%, whilst amongst those with difficulty but not requiring assistance this drops further to 59%. However, confidence is higher among PRMs who have flown in the last year. 83% in this group are confident in the safety of UK airports and airlines, compared to 58% of PRMs who have not flown in the last year.
- PRMs are also less satisfied with the balance between security screening and convenience, with just 53% agreeing that the balance is about right, compared to 65% of non-PRMs. Those with difficulties who do not require assistance are even less content, with only 45% agreeing.

PRM

- Consumers travelling in premium cabin class are also less content with the balance between security and convenience, with 64% agreeing that it is right compared to 74% of those in standard cabin classes. This cabin class difference was not present last wave.

Cabin class

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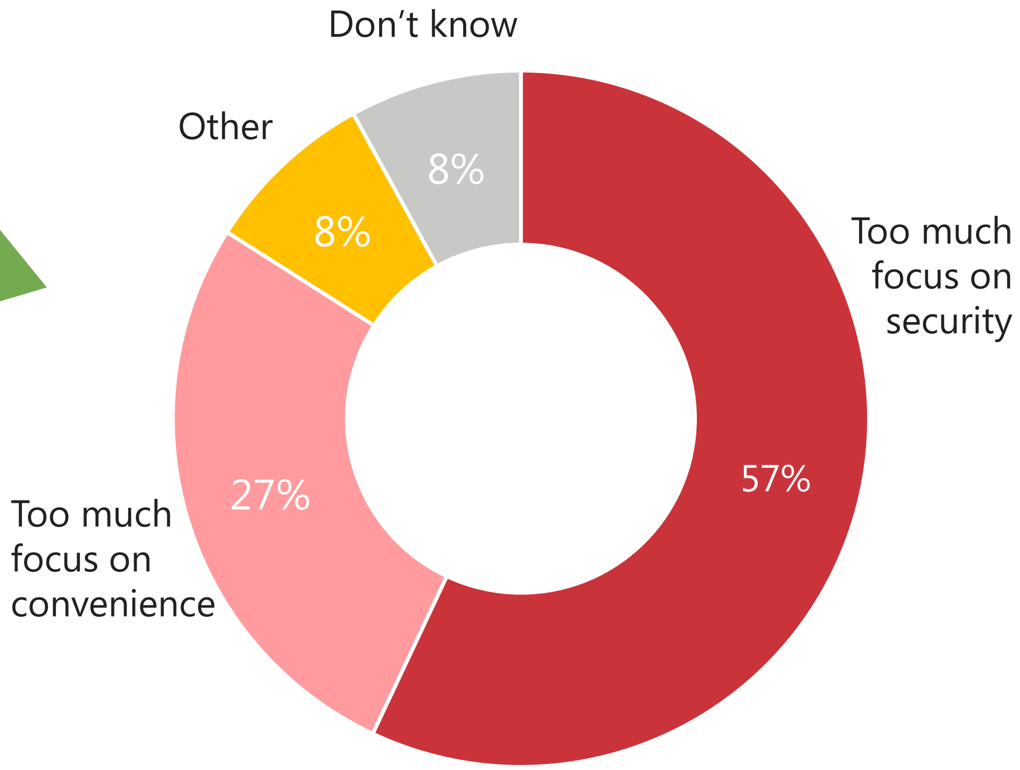
Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3551)

Imbalance between security screening and convenience

The slight majority of consumers expressing disagreement with this balance feel that there is too much focus on security at the expense of convenience, just over a quarter feel that convenience is prioritised over security screening.

11% **Think the balance between security and convenience is not right.**



Of those who felt the balance between security and convenience requires improvement…

- Recent flyers are more likely to indicate that there is too much focus on security. Almost two thirds (65%) of those who do not think the balance between security screening and convenience believe there is too much security.
- Frequent flyers are more likely to believe there is too much focus on security screening. 73% of those who fly four or more times a year see the balance as being tilted too much towards security.
- PRMs are less likely to state that there is too much focus on security. Half (51%) think security is too great, compared to 58% of non-PRMs.
- Men who think the current balance between security and convenience is not right are more likely to think that there is too much focus on security. 64% of men think that there is too much focus on security, compared to 47% of women.
- Younger generations also believe that too much focus is placed on security as opposed to convenience to passengers. Two thirds of 25-34 year olds think that too much emphasis is placed on security, compared to 54% of those aged 65+.

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Q41. You disagree that the balance between security screening at UK airports and convenience to passengers is about right. Which of the following best describes how you feel about this balance? Base: All who disagree that the balance is about right (406)

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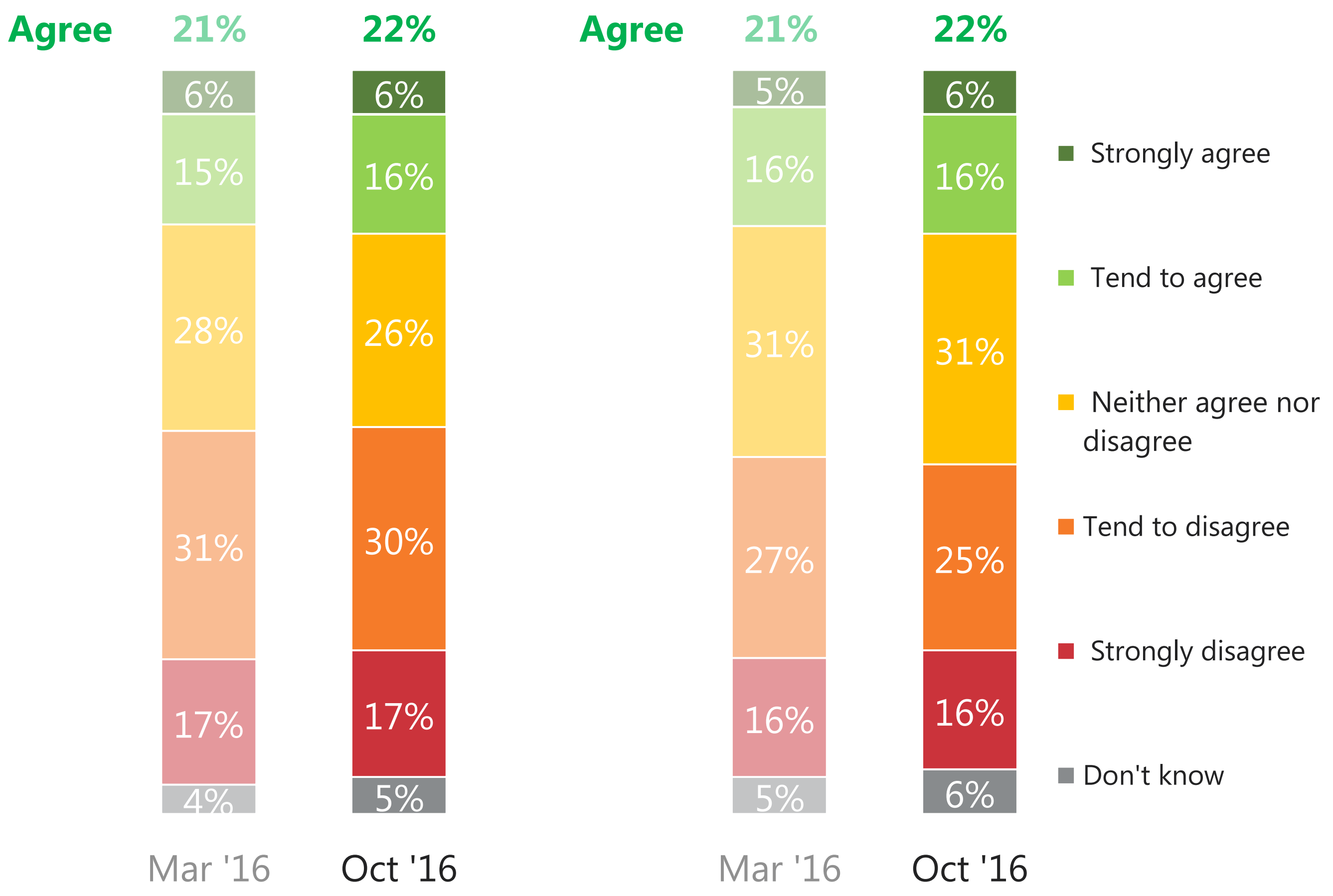
Headline Measures: Environment

The environment is not a factor for most people when they think about flying to a destination, and two fifths would not be willing to pay more to reduce the environmental impact of flying.



When deciding whether to travel by air, I think about the impact of flying on the environment

I would pay more for flight tickets to reduce the environmental / noise impact of flying

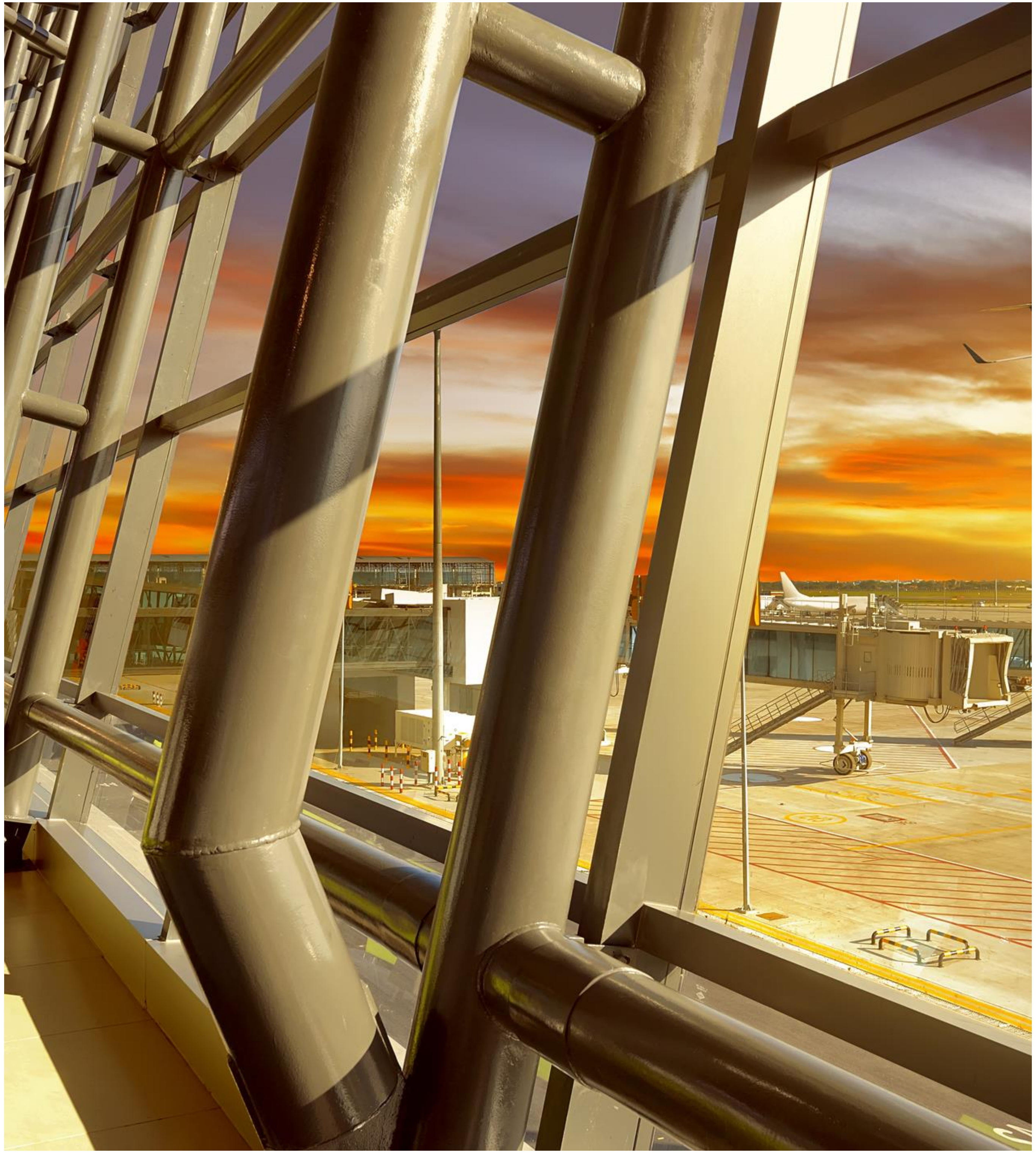
- Younger age groups show greater concern for the environment, with 26% of 18-34s agreeing that they think about the impact of flying on the environment, compared to 19% of over 65. These age groups are more likely to be willing to pay more, with 26% agreeing that they would pay more, compared to 21% of older age groups. Those residing in the East and London are also the most likely to be considering the environment when flying (27% and 25% agree). **Age & Region**
- Environment is important amongst those who have flown for business purposes in the last 12 months. They are more likely to think about the impact of flying on the environment (29% agree) and would be willing to pay more to reduce this (35% agree). **Purpose**
- Some airlines' customers appear to be more environmentally conscious than others, with with those flying on EasyJet and Emirates more likely to agree that they think about the environment (28% and 36% agree respectively). In addition to these two airlines, those flying on British Airways claim to be more likely to pay more to address this (29%, 36% and 29% agree respectively). **Airline**
- UK consumers flying with children are more likely to express concern for the environment, 26% agree compared to 22% of those flying without children. **Children**
- Interestingly, those in the higher household income brackets are more likely to disagree that they think about the environment; with 53% of those in households earning £40,000 or more disagreeing. **Income**

Ipsos Loyalty

Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3551)

Flying behaviour

Ipsos Loyalty



Flying behaviour - Summary

A large majority have experience of flying and half have a flight experience in the last 12 months. Budget constraints remain the biggest barrier to flying.

- **The vast majority (94%) have ever flow and over half (55%) have flown in the past 12 months.**
  - PRM (10%) are more likely to have never flown than UK consumers overall (6%).
  - Those on low income (13% of those with a household income of up to £14,999 and 8% with a household income of £15,000 to £24,999) are also disproportionately more likely to have never flown than UK consumers overall (6%), whilst those on high incomes are most likely to have flown in the past 12 months (71% of those with incomes of £40,000 to £74,999 and 82% of those with incomes of £75,000 or more.
  - Compared to UK consumers overall, higher income groups also expect to being flying more in the next 12 months (22% of those earning £40,000 to £74,999 and 27% of those with earning of £75,000 or more, compared to 19% on average), while those on the lowest incomes (up to £14,999, 17%, compared to 12% overall) expect to be flying less.
- **Holiday continues to be the main reason for people flying (87%).**
  - Three in ten (29%) fly to visit friends or relatives and 13% do so for business or work reasons.
- **The cost of travel/budget constraints remains the biggest barrier to flying overall (42%) and across all subgroups.**
  - Three in ten have not travelled recently due to not making any trips where flying is an option. Other barriers to flying, each mentioned by around one in ten, are fear of flying, preference of another mode of transport, health or disability reasons, and a dislike of the airport or flying experience.
- **Around one in five (19%) are defined as a person with reduced mobility (PRM), someone who is limited in their day to day activities by a disability or health condition.**
  - The disability or health condition of half (52%) of these UK consumers makes or would make flying difficult, and among this group with a disability or health condition and difficulty flying, two-thirds (68%) would require assistance when flying (this equates to 7% of UK consumers overall).
  - Among PRM with difficulty flying, it is those with a physical condition who are most likely to require assistance when flying (74%).

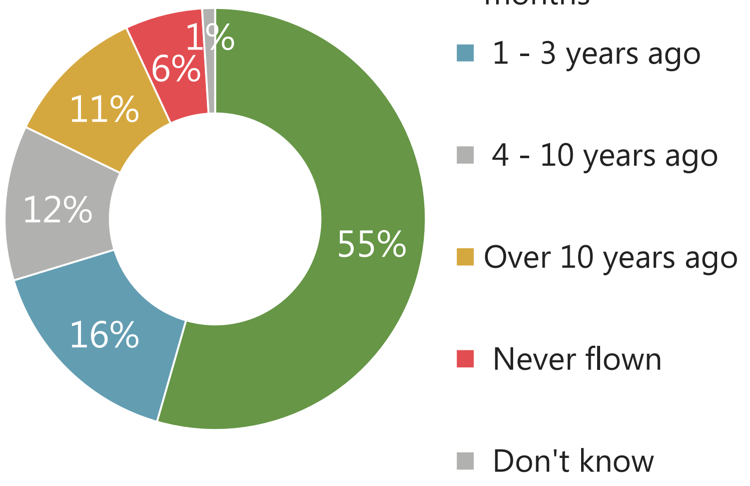
Ipsos Loyalty

Civil Aviation Authority

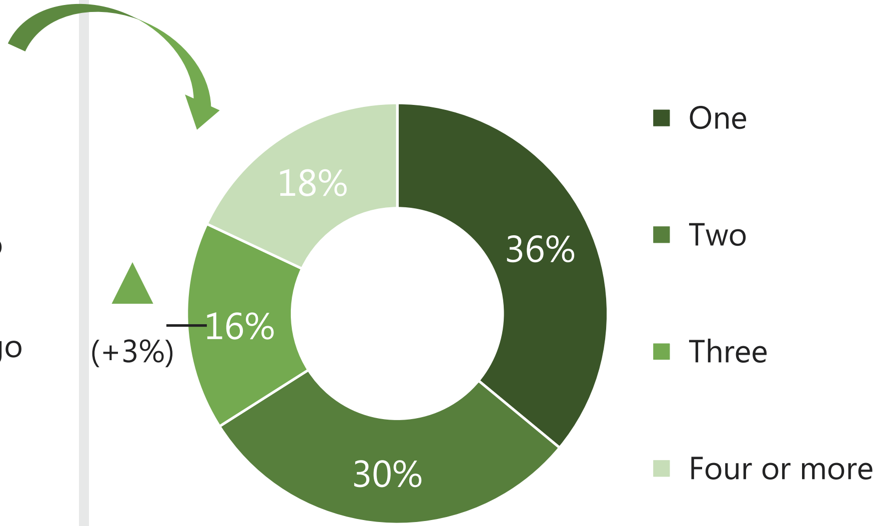
Flying behaviour: A general overview

Flying behaviour remains unchanged, with just over half of UK consumers flying in the last year. Of these recent flyers two thirds have flown once or twice in the last year, mostly travelling on holiday.

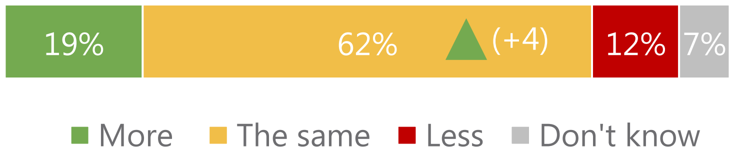
Last flight from a UK airport



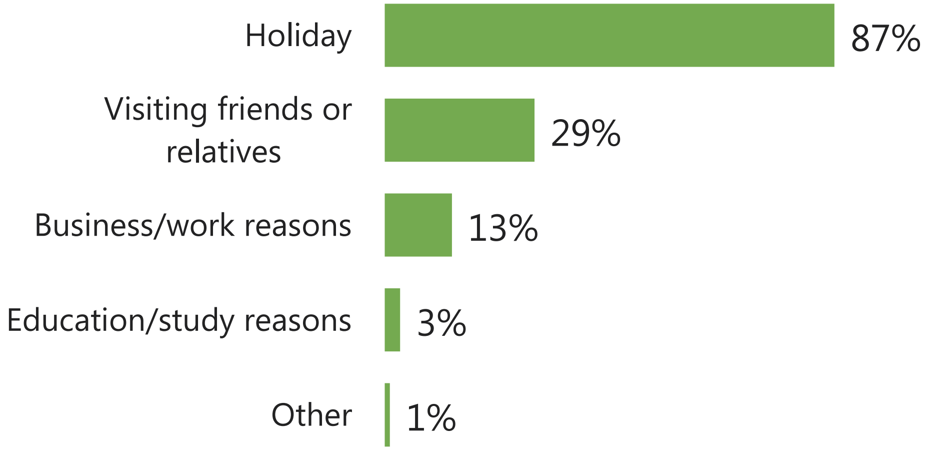
Number of flights in the last 12 months



Anticipated changes in the next 12 months



Purpose of flights in the last 12 months



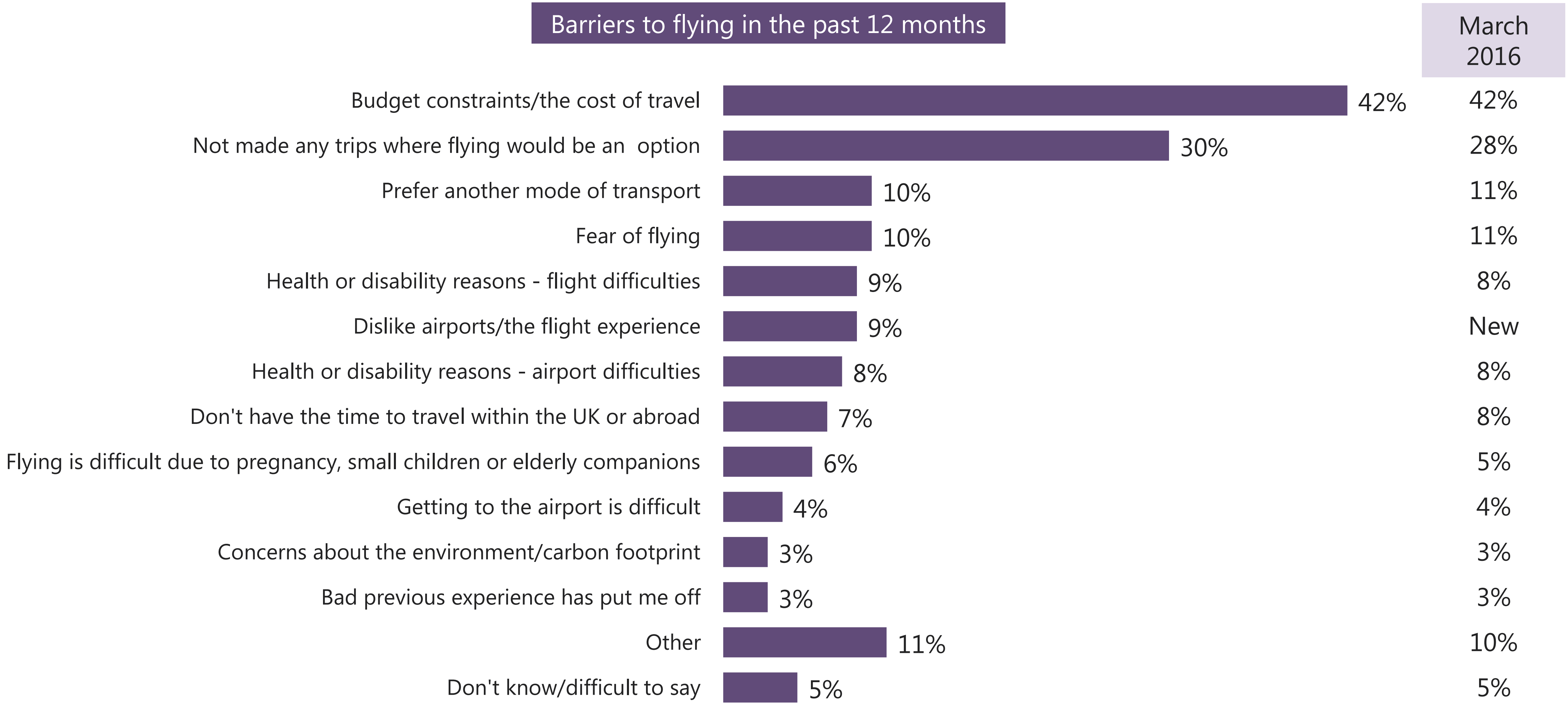
Ipsos Loyalty

Q10. When was the last time you flew from a UK airport? Base: All participants (3551) | Q11. How many trips by air have you made in the last 12 months? Base: All participants flown in last 12 months (1967) | Q12. For which of these reasons have you made flights in the last 12 months? Base: All who have flown in the last 12 months (1965) | Q13. In the next 12 months, do you expect that you will fly more, the same amount or less compared to now? Base: All participants (3551)

Civil Aviation Authority

Flying behaviour: Barriers

Budget constraints/cost of travel continues to feature as the top cited reason for not flying in the last 12 months.



Ipsos Loyalty

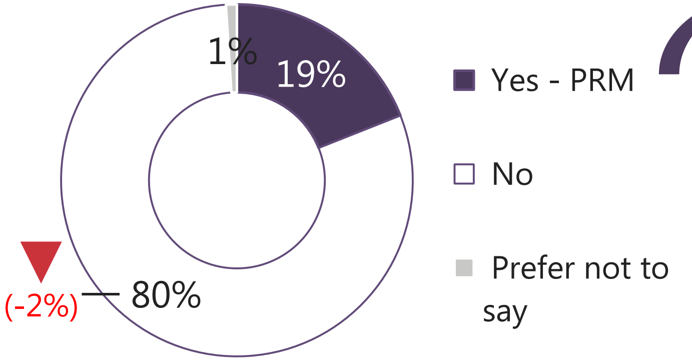
Q20. Why have you not flown within the last 12 months/not flown in recent few years/never flown? Base: All who have not flown in the last 12 months (1,584)

Civil Aviation Authority

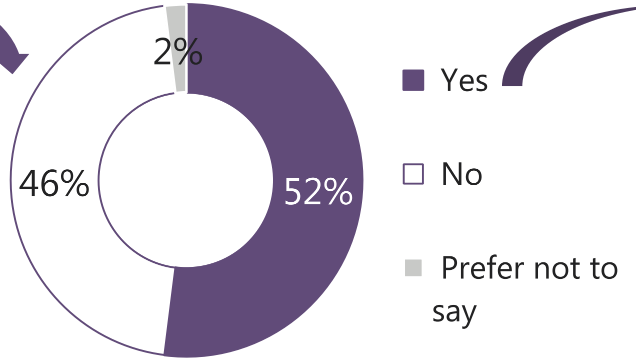
Flying behaviour: Those with disabilities

Almost 1 in 5 is a person with restricted mobility (PRM) (defined as those who have a disability or health condition). Half find the air travel experience difficult. Air travel is less recent with significantly more PRMS having never flown.

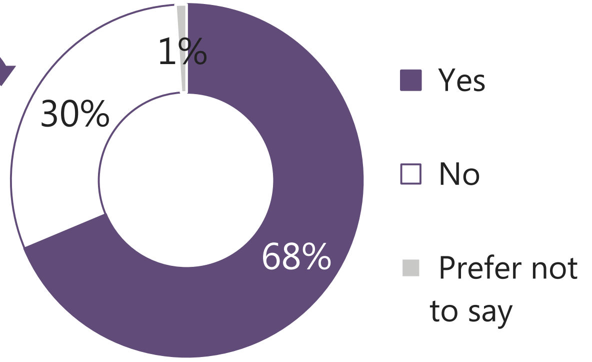
Disability or health condition?



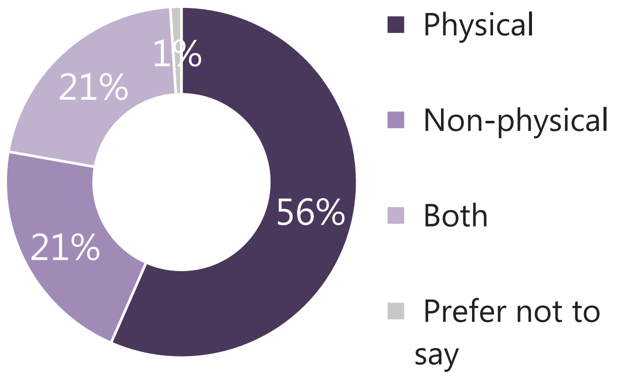
Does/would disability or health condition make airports/flying difficult?



Disability or health condition means assistance would be needed when taking a flight



Is disability physical/non-physical or both?



Last flown from UK airport

	Within last 12 months	1 - 3 years ago	4 - 10 years ago	10+ years ago	Never flown
PRM	35%↓	17%	16%↑	20%↑	10%↑
Non-PRM	60%	16%	11%	8%	5%

↑↓ = significant difference v Non-PRM

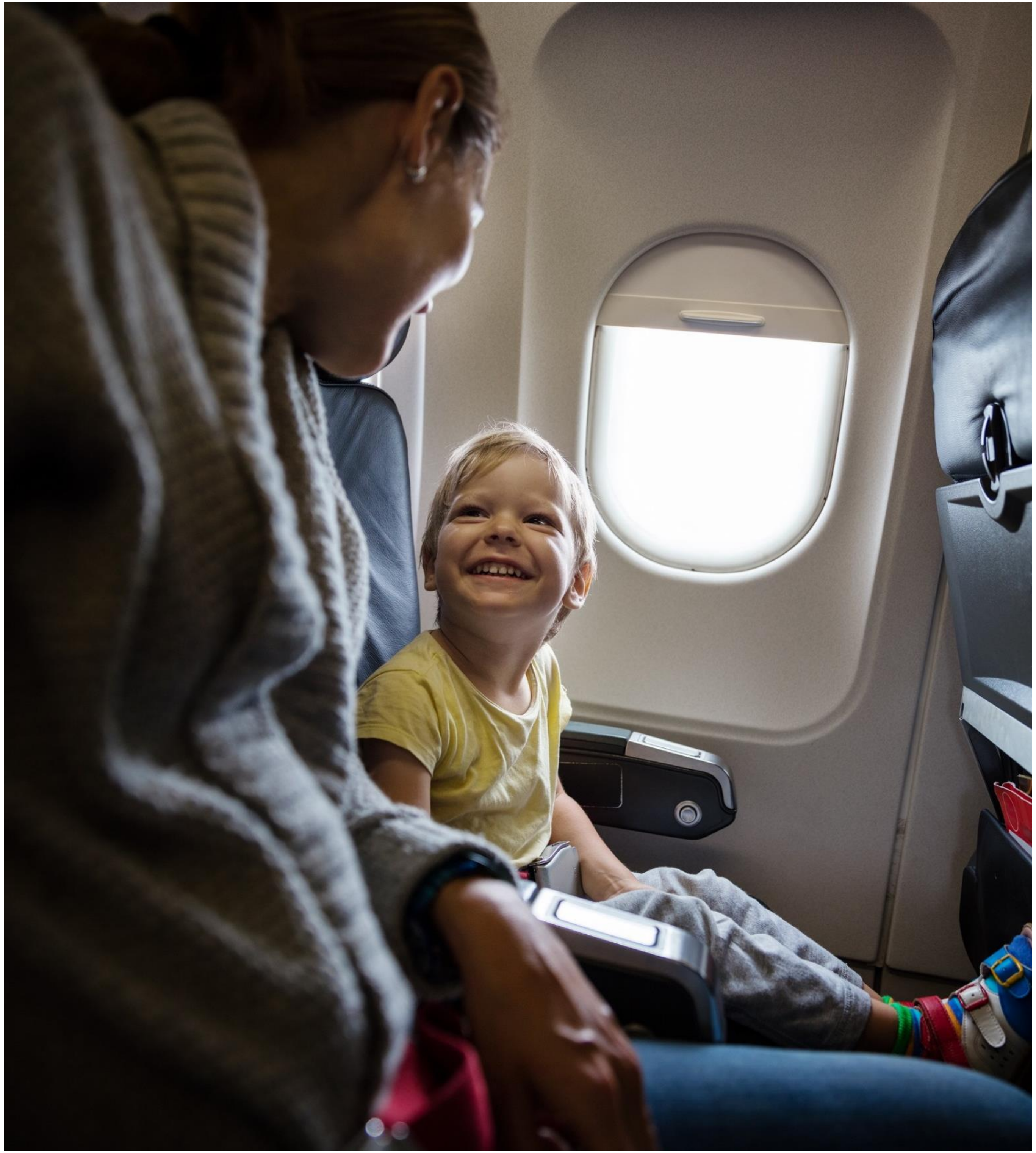
Ipsos Loyalty

Q30. Do you have any disability/health condition that limits your day-to-day activities? Base: All (3,551) | Q31. Does/would your disability make accessing/using airports/flying difficult? Base: All PRM (674) | Q32. Would you classify your disability as physical/non- physical/both? Base: All PRM (online participants only, 623) | Q33. Does your disability mean that you would need assistance from the airport/airline when making a flight? Base: All PRM who need assistance flying (350) | Q10. When was the last time you flew from a UK airport? Base: PRM (674), non-PRM (2,837)

Civil Aviation Authority

Recent flying experience

Ipsos Loyalty



Recent flying experience - summary

The majority of flights are taken in economy class and are booked online. The pre-booking, booking and in-flight experiences are typically very good with some dissatisfaction with complaint handling and the choice between airlines and airports in certain parts of the UK.

- **Close to two-thirds (63%) flew in the 3 months leading up to the survey and one in five (21%) flew with children. 86% travelled in economy class.**
  - The proportion flying in the last 3 months increased from 42% in March 2016, likely owing to seasonal differences with the current survey being conducted just after the summer holiday season.
  - The most commonly used departure airports were Gatwick (18%), Manchester (17%) and Heathrow (16%) and the most commonly used airlines were Easyjet (21%), British Airways (16%) and Ryanair (13%).
- **The majority of flights (79%) were booked online, in particular those booked direct with the airline. There is more offline involvement when booking with holiday companies or travel agents, though in the majority of cases these are also booked online.**
  - The most commonly used information sources when researching the flight were airlines (48%), comparison sites (31%) and holiday companies (28%).
- **Overall satisfaction with the last flight is high at 88% (a slight fall from 90% in March 2016).**
  - The flight experience, from deciding which flight to book to the in-flight experience, is very well received with between eight and nine in ten satisfied at each touchpoint. Three quarters are satisfied with value for money and 58% with complaint handling where applicable. A sizeable minority of 13% are dissatisfied with complaint handling.
- **Satisfaction with elements of the pre-booking stage is generally high with some areas of dissatisfaction for a minority:**
  - 13% are dissatisfied with the choice between airlines (increasing to 22% among those in Scotland and 21% among those in Northern Ireland) and 11% are dissatisfied with the choice between departure airports (again those in Scotland are more dissatisfied than UK consumers overall, at 17%).
- **Compromising over preferences when booking is common with 46% of flyers doing this on their recent flight.**
  - These compromises include using a no-frills airline (20%), taking only hand luggage (16%), and travelling at a less convenient time (15%).

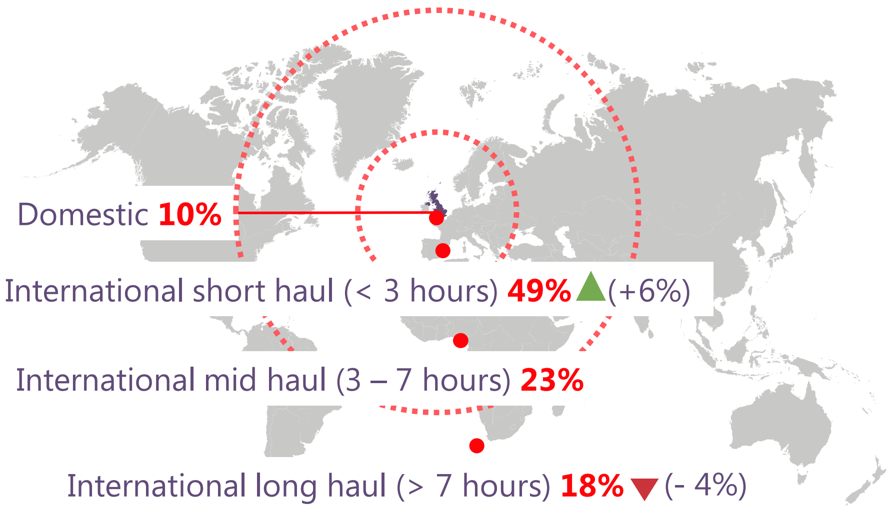
Ipsos Loyalty

Civil Aviation Authority

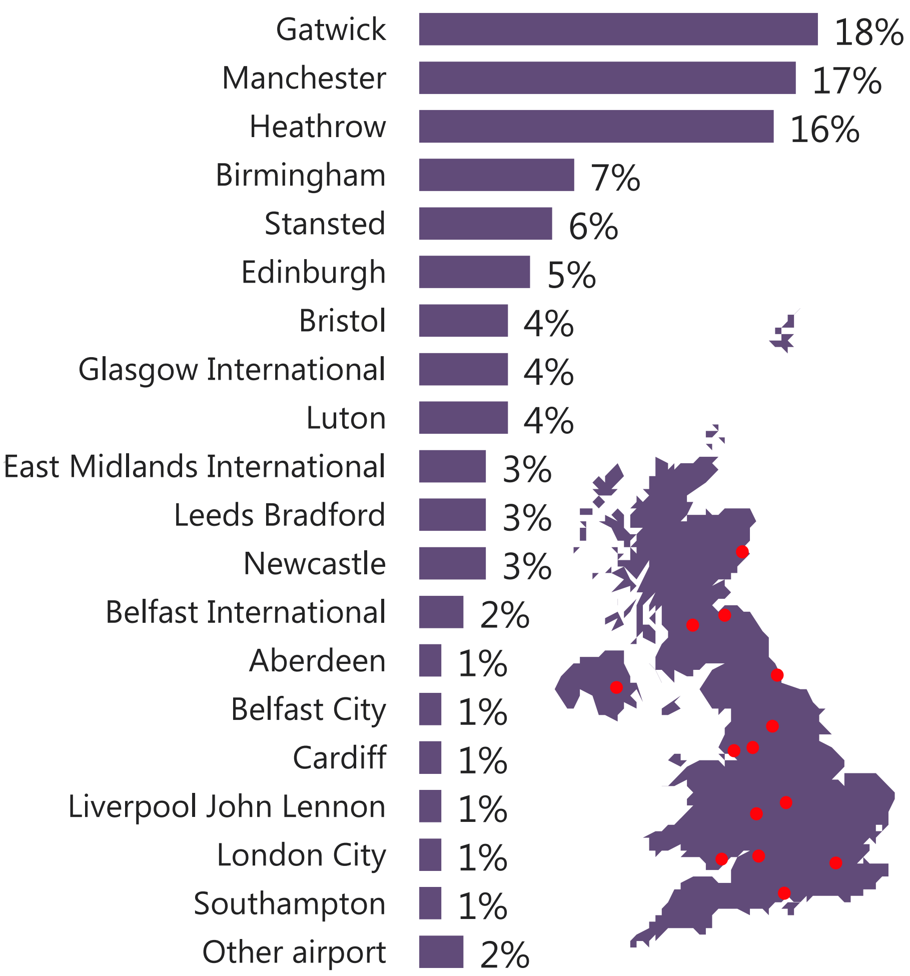
Last flight: Journey details (1)

Almost half of recent flyers have taken an international short haul flight in the last year. Gatwick, Manchester and Heathrow remain the most commonly used departure airports. A fifth of recent flyers used Easyjet on their last trip.

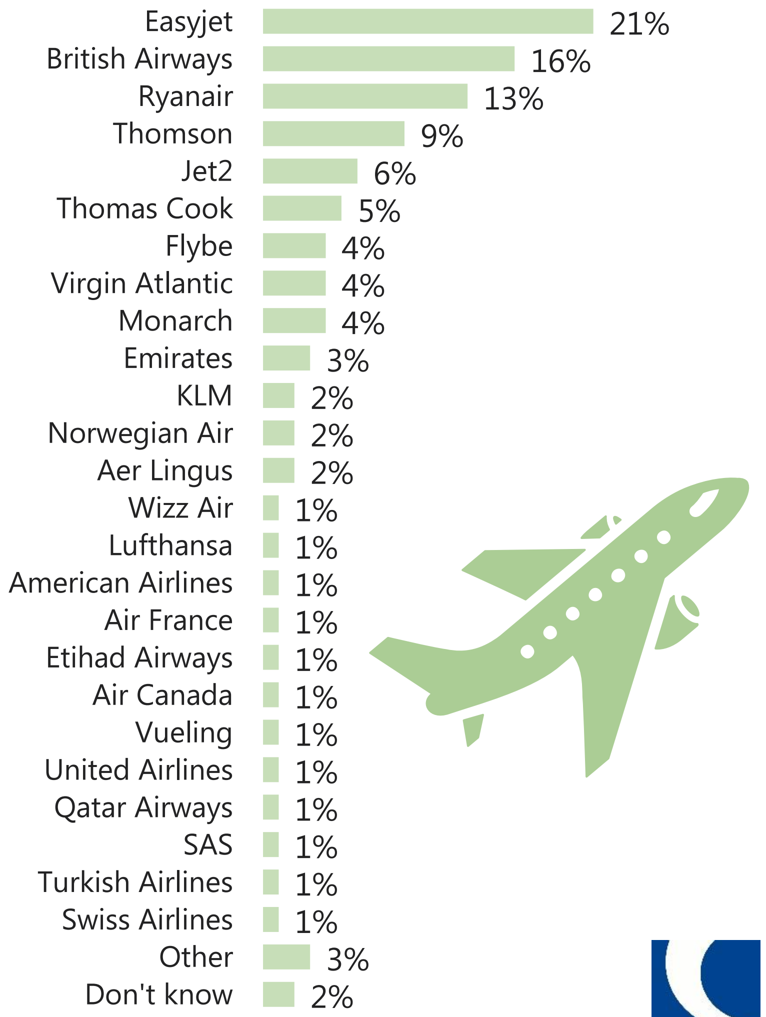
Was the flight domestic or international?



Departure airport



Airlines used



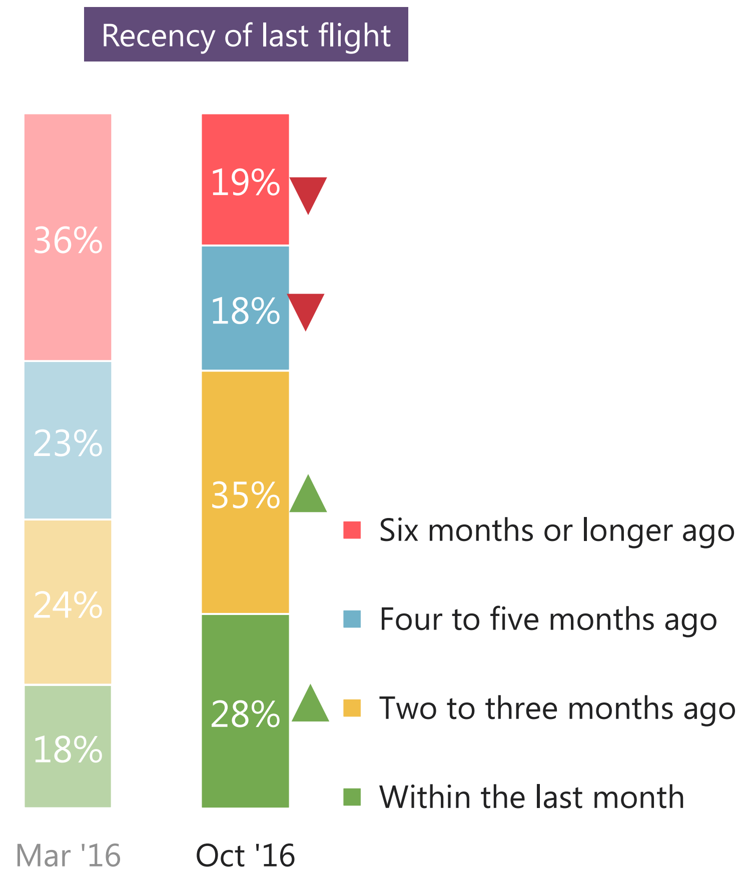
Ipsos Loyalty

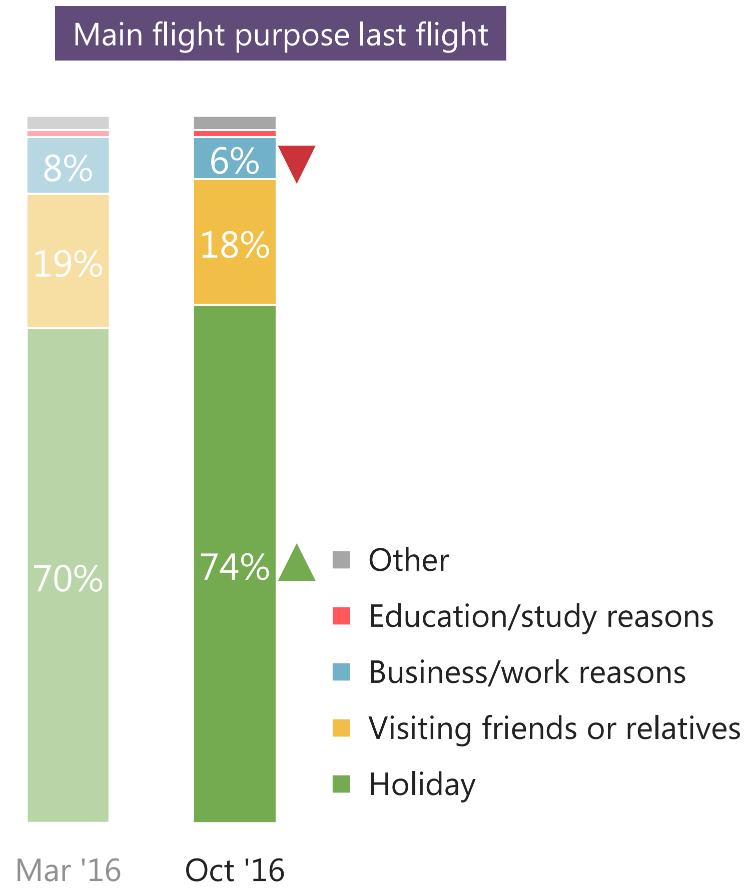
Q51. Was this flight domestic or international?, Q53. What airport did you fly out from in the UK?, Which airline or airlines did you fly with on your most recent trip? Base: All who have flown in the last 12 months (1,965)

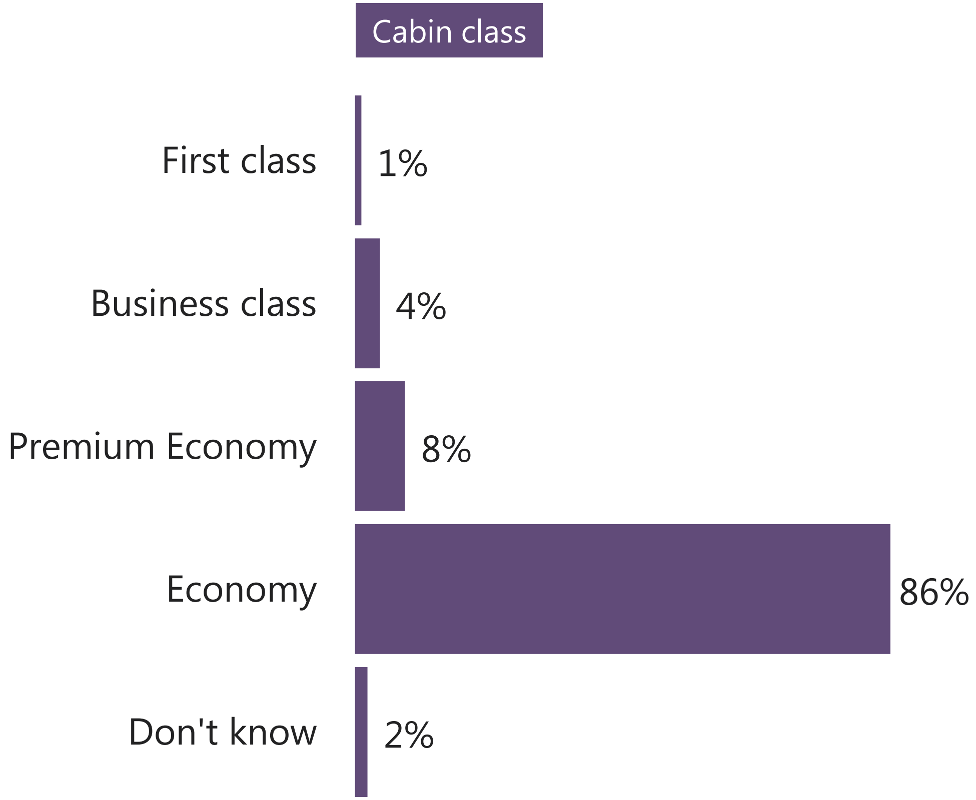
Civil Aviation Authority

Last flight: Journey details (2)

Most recent flyers have flown in the last 3 months, the change in flight recency reflects the close timing of fieldwork to the end of the summer season. More than four in five travelled in Economy class, with just 1% in First class.







Ipsos Loyalty

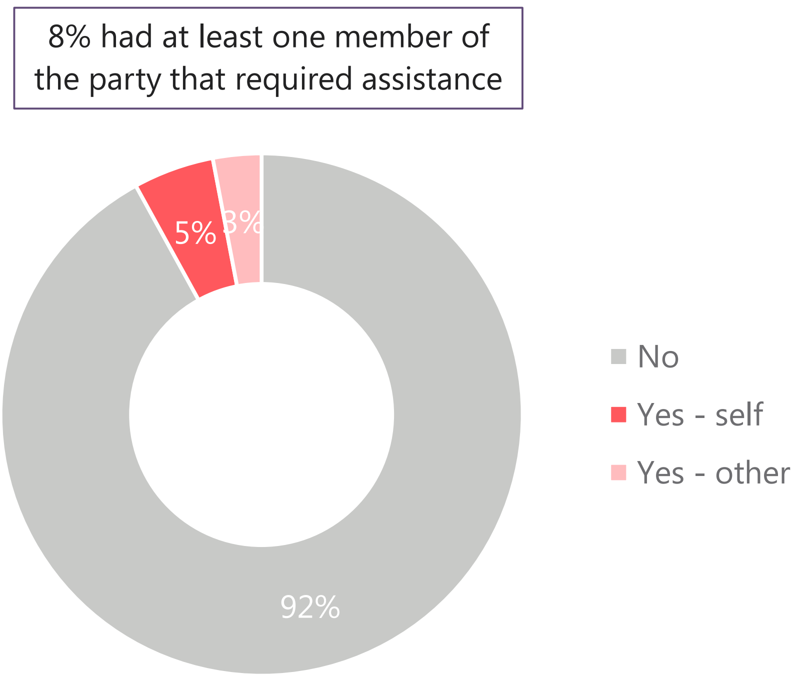
Q50. Roughly, when was the last time that you flew? Q52. What was the main reason for your last flight? Q54. Which cabin class did you travel in for your last flight? Base: All who have flown in the last 12 months (1,965)

Civil Aviation Authority

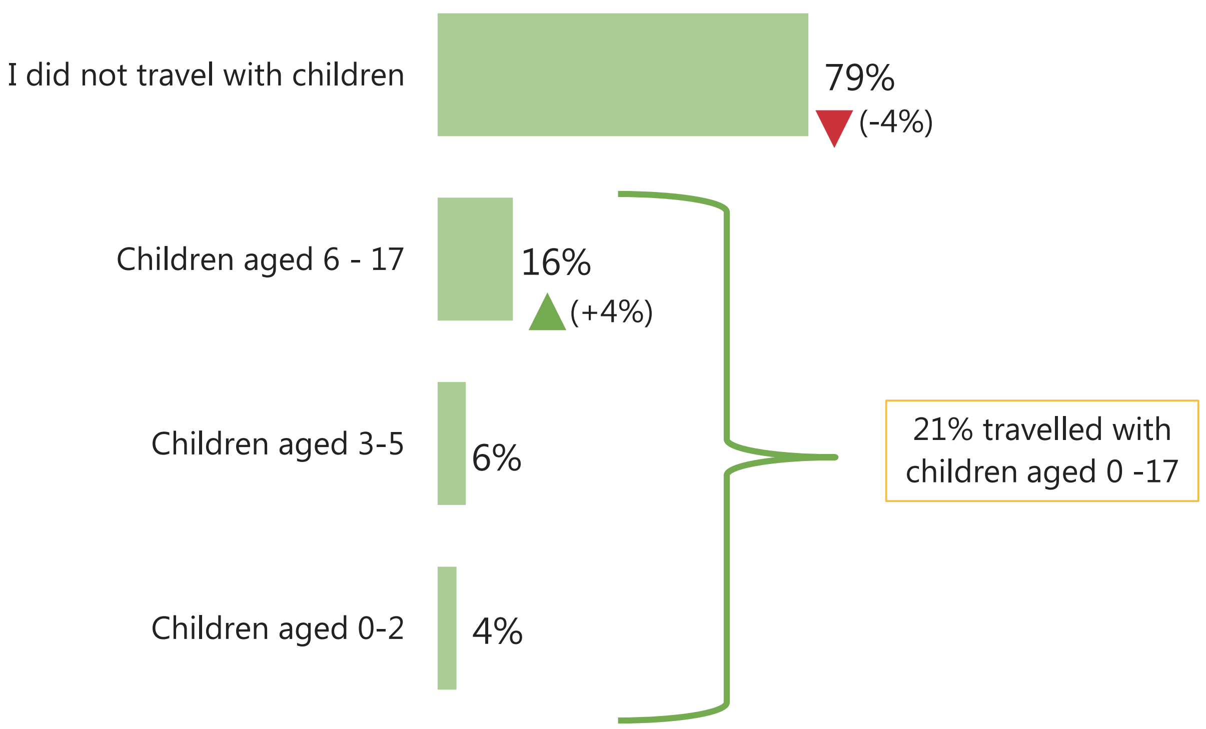
Last flight: Journey details (2)

8% were travelling with at least one person in the party requiring assistance and over a fifth were travelling with children, showing an increase for those travelling with 6-17 year olds compared to the previous wave, indicating the impact of summer travel.

Assistance needed last flight due to disability/health condition?



Travelling with children on last flight?



Ipsos Loyalty

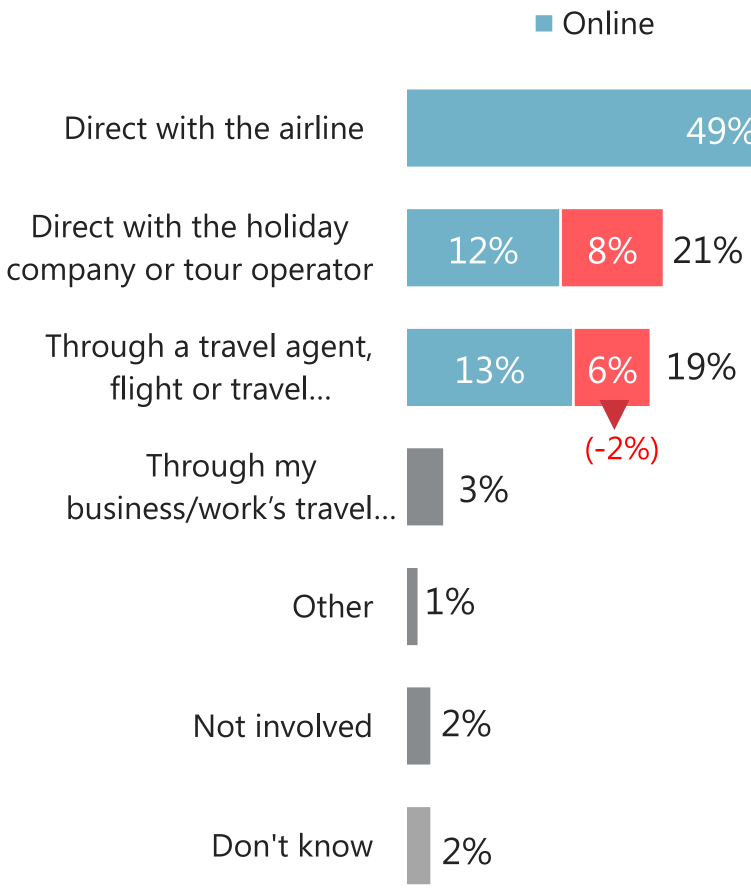
Q55. If you travelled with children on this occasion, what age were the children?, Q56. Did you or anyone in your party have a disability or health condition that meant assistance from the airport or airline on either the outward or return flight?: Base: All who have flown in the last 12 months (1,965)

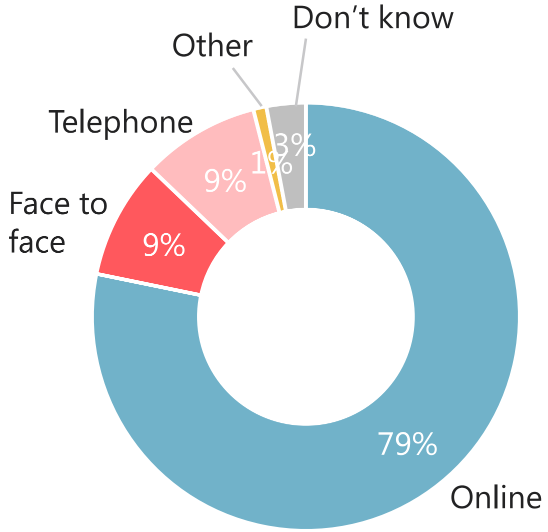
Last flight: Booking method

Almost half of recent flyers researched using the website of the airline that they flew with. Around 1 in 3 used comparison sites and holiday companies/tour operators. Around 8 in 10 flights are booked online, and half are booked online through an airline's website.

Research sources

Booking method on last flight





Ipsos Loyalty

Q56b Which sources of information did you use when you were researching which flight to book? Q57. How was this most recent flight booked? Please tell us who you booked the flight with and then the method used. Base: All who have flown in the last 12 months (1,965)

Civil Aviation Authority

Extra information required when choosing and booking

Extra charges and full information about fees is commonly cited as unclear, whilst extra information about dietary requirements and travelling with children are also important issues.

Any hidden charges i.e. how much if my bag was only over by a small amount of weight."

It is difficult to directly compare because of differences in booking fees, included/excluded bag sizes, charges or not for seats, the list is endless."

Supplying the information about passport numbers was fiddly and when abroad, it's hard to book in online for the return journey when there is reduced access to the internet."

It was difficult to find out what food would be served. In the end it was a snack which met my veggie needs but not gluten free. I need mobility assistance which worked on the way out but not back."

I like to travel from XXXXX when possible. It is difficult to find which airlines use the airport and the corresponding destinations. I am not interested in indirect flights so want to research who flies direct before I book. I know that Flybe and Monarch serve most destinations, but it is difficult to shop around without an easy way to find who flies from which airport to which destination. I very often find out by looking at arrival/departure information and working out the airline through the flight code...a bit of a faff!"

We needed to know how to use the public transport system at our destination airport most efficiently."

Flying with a 5 month old - I had to call the airline to check about prams and car seats and it was quite a vague answer. I just took my chances. (Everyone was SO helpful when flying though - airline, security and airport staff)."

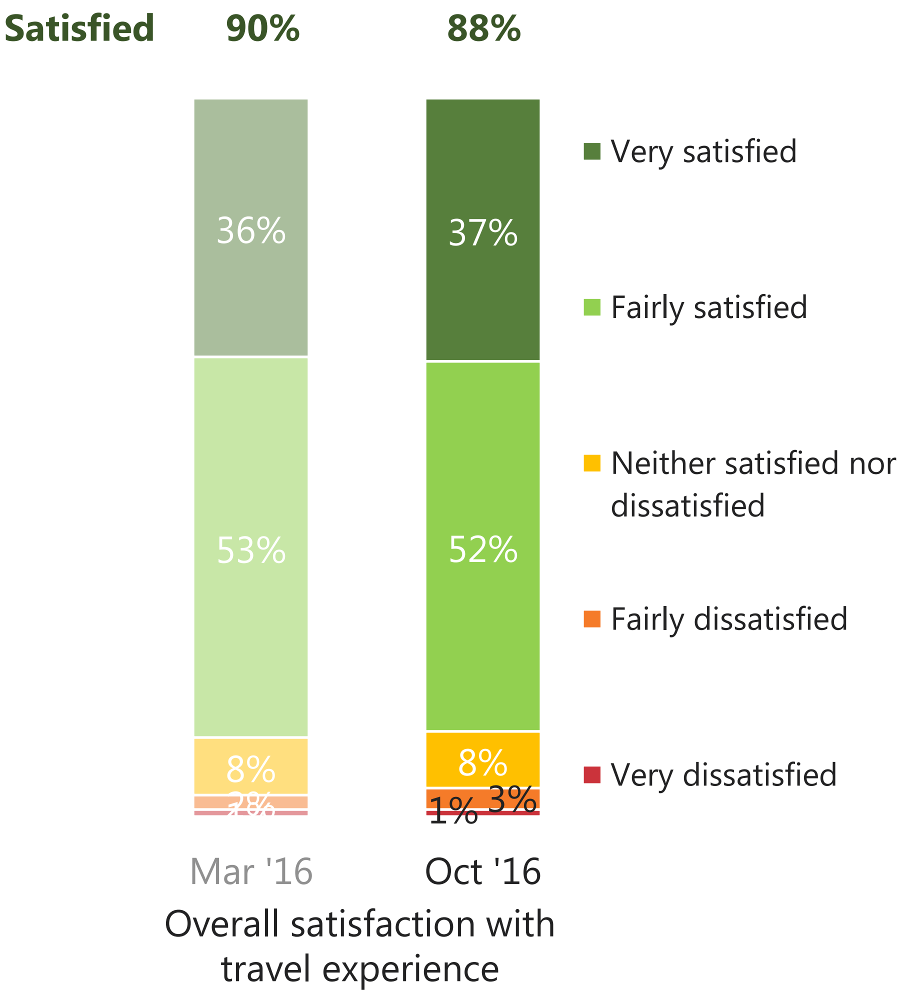
Ipsos Loyalty

Q58. When you were choosing and booking this last flight, was there any information that you particularly needed but which proved either hard to obtain or hard to understand?
Base: Recent flyers who booked online

Civil Aviation Authority

Last flight: Overall satisfaction

Overall satisfaction with the most recent travel experience is consistently high, with only 4% dissatisfied.



- Satisfaction with the overall experience remains high, this is broadly mirrored across all sub-groups.
- Any disruption has a significant impact on satisfaction, those recalling an issue are more likely to show dissatisfaction (13% dissatisfied). Significant delays have the largest impact on dissatisfaction. One in five (21%) of flyers who experienced delays of more than two hours express dissatisfaction with the overall travel experience.
- Overall satisfaction is lower amongst PRMs (83%), and those who have difficulty with air travel but do not require assistance continue to be less satisfied (77%).
- Across airlines used there is some marginal variance with Thomson flyers more satisfied than average (96%). Those booking with a holiday company offline mirror this trend with 95% satisfied with the overall flight experience.
- In line with the general attitude towards air travel, those travelling with young children between 0-2 years of age, are not amongst the least satisfied flyers this wave (1% dissatisfied compared to 7% last wave). At the same time, there has been a directional increase in satisfaction with travel to and from the airport amongst this group, with 86% satisfied in this wave compared to 80% in wave one.

PRM

Airline

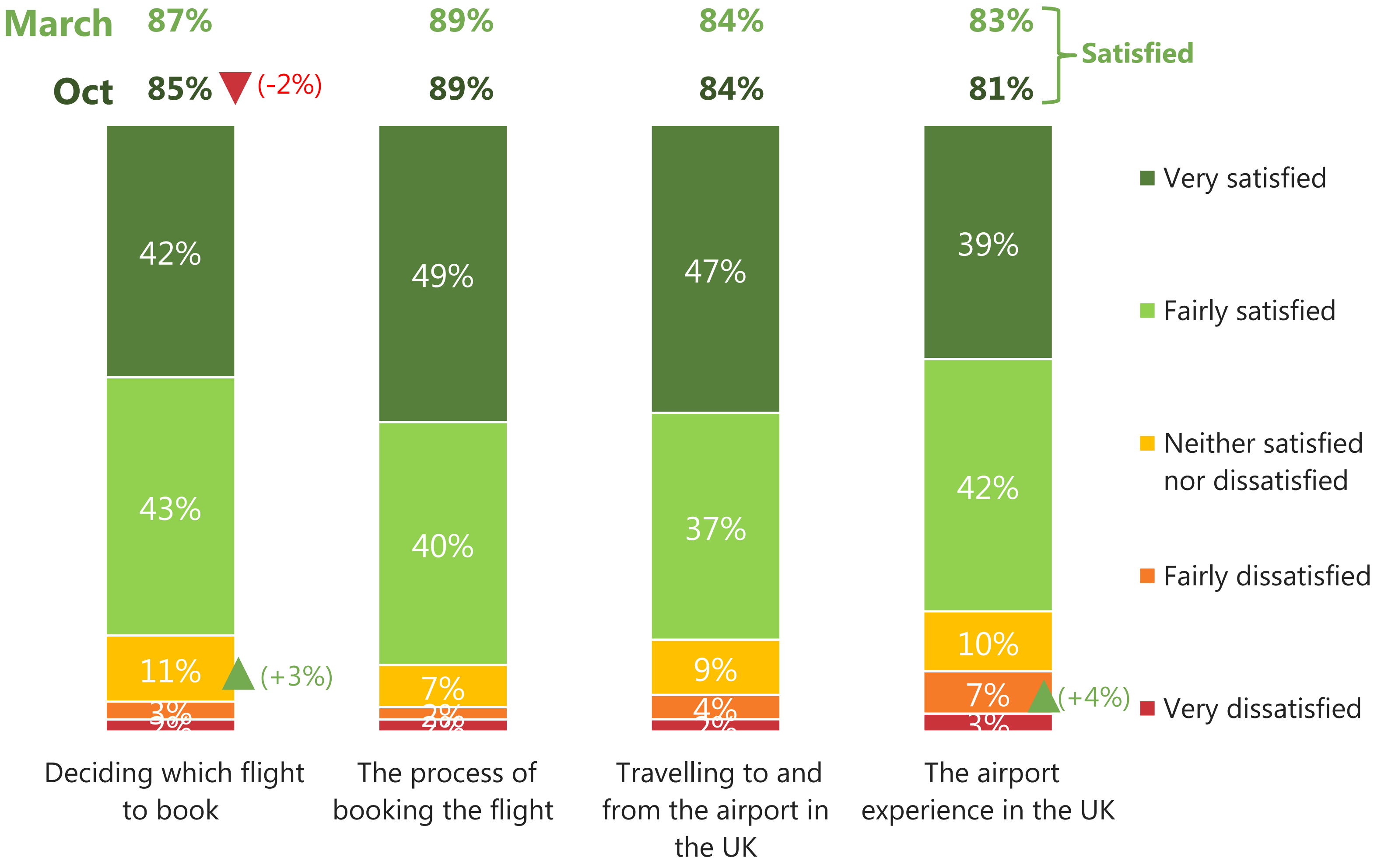
Ipsos Loyalty

Q61. Now taking all the elements into account, how satisfied or dissatisfied were you with the overall travel experience on this most recent occasion? Base: All who have flown in the last 12 months exc. DK (1,965)

Civil Aviation Authority

Last flight: Satisfaction with elements of the journey

Although satisfaction with making the flight decision has dipped slightly, in general the booking process, travel to the airport and the airport experience are all viewed very positively.



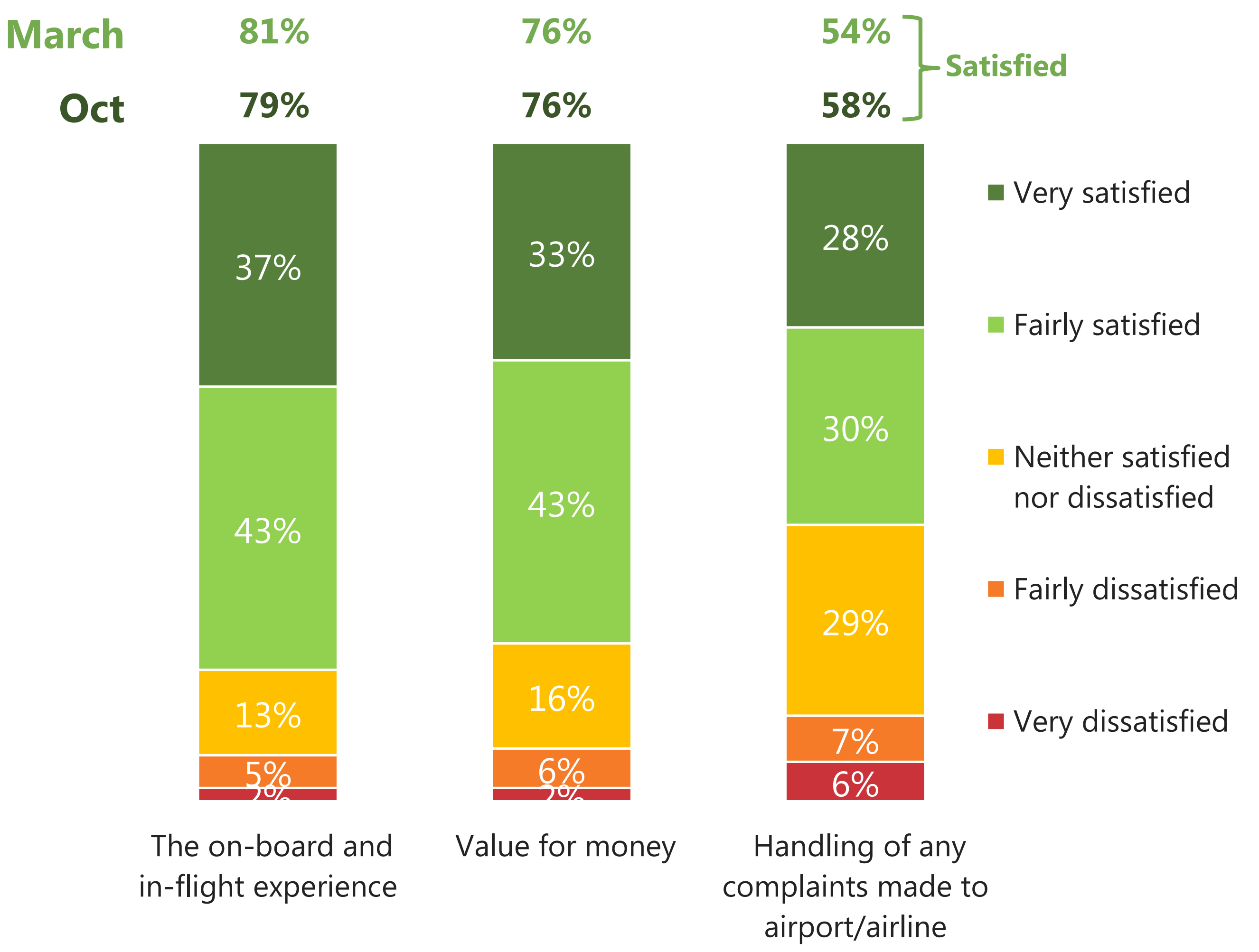
- Satisfaction with deciding which flight to book has shown a slight decline. However, movement has been towards a neutral response and dissatisfaction remains consistently low.
- PRMs are less satisfied with deciding which flight to book (81% satisfied). This drops further amongst some PRM subgroups: particularly those with a physical condition, of those with a physical condition, 79% are satisfied, and 76% of those who have difficulty but did not require assistance are satisfied. Dissatisfaction is also higher amongst those who required assistance, either for themselves or another member of their party (9% dissatisfied, compared to 4% amongst those who did not require assistance).
- Those who took their last flight in premium cabin class are more likely to be dissatisfied with the decision-making and booking process (10% and 8% dissatisfied respectively). Booking via a holiday company shows reduced dissatisfaction with the decision making (just 2%). Additionally, those flying via Ryanair were less satisfied with this aspect (only 81% satisfied).
- The airport experience is relatively comparable across airports but travelling to the airport is not viewed as positively for those who took their most recent flight from Gatwick (80%) or Luton (75%).
- PRMs are also less satisfied with the airport experience (75% satisfied). As are those travelling with children aged 3-5 years (73% satisfied).

Ipsos Loyalty

Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK (1,863 - 1,958)

Last flight: Satisfaction with elements of the journey

8 in 10 are satisfied with the on-board experience and three quarters are satisfied with value for money. Complaint handling has improved slightly but 13% of those who complained expressed dissatisfaction with how their complaint was handled.



- Satisfaction with the on-board experience remains high and largely consistent across sub-groups. However, passengers using using EasyJet and Ryanair are less satisfied with the on-board and in-flight experience (73% and 70% satisfied respectively). Those flying with Thomson have a more positive view, with 86% satisfied.
- The flight experience is enhanced for those flying in premium economy (90% satisfied) and those who made a face to face booking (85% satisfied).
- PRMs are less satisfied with the perceived value for money of flying, as are those travelling on long haul flights (both 70% satisfied). Flyers using business class cabins are also less satisfied with value (67%). In contrast those travelling on Thomson registered greater satisfaction with value (79%).
- Complaints handling has shown directional improvement. Those who are aware of ATOL are amongst some of the most satisfied (62%). Unsurprisingly, those encountering an issue along their journey are less likely to be satisfied (47%) and dissatisfied (27%).
- Those flying in economy (55%) and also those who booked via a travel agent (46%), are also less satisfied with complaint handling.
- Dissatisfaction with complaint handling is greater among PRMs who find air travel difficult (25% dissatisfied) and amongst those who required assistance (29% dissatisfied).

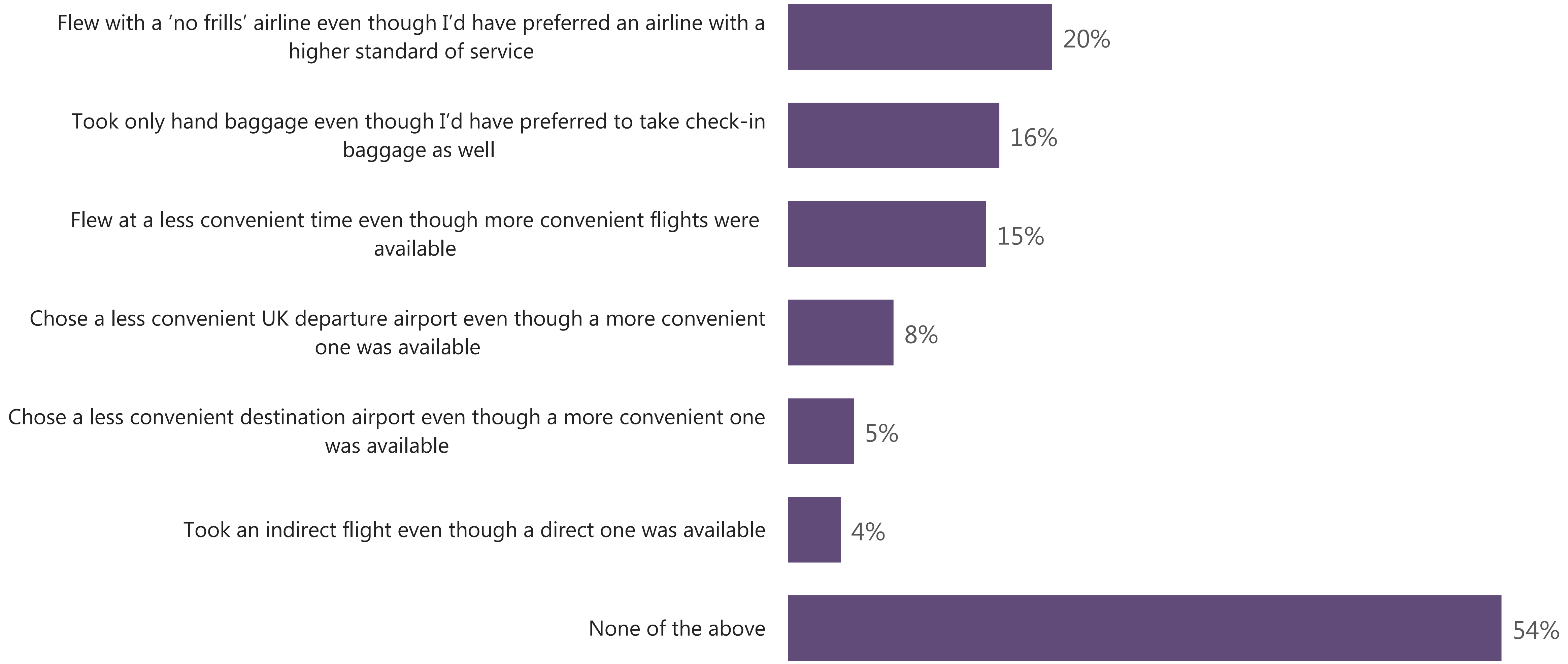
Ipsos Loyalty

Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK (1,863 - 1,958). All who have flown in the last 12 months and made a complaint exc. DK (532)

Civil Aviation Authority

Value and compromise

Just under half of recent flyers indicate that they made a compromise on their most recent flight. However, relatively few flyers (8%) have changed their departure airport.

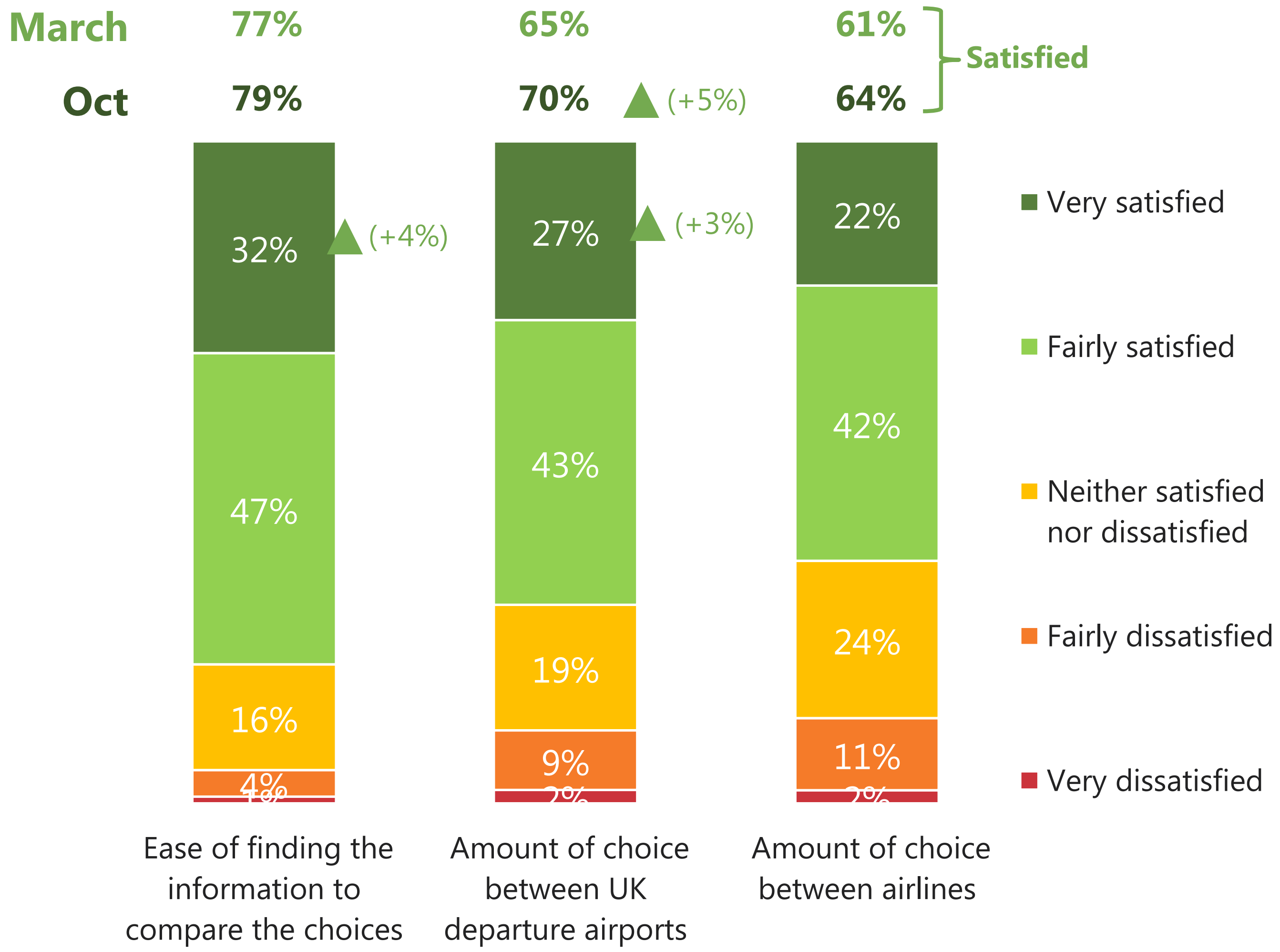


Ipsos Loyalty

Q53b Still thinking about this most recent flight, did you do any of the following to save money on your trip? Base: All who have flown in the last 12 months (1965)

Last flight: Satisfaction with elements of pre-booking

Information sourcing is generally viewed positively by UK consumers, satisfaction with airport choice has increased, whereas satisfaction with airline choice has marginally declined



- There has been an upward shift in those 'very satisfied' with the ease of finding information to allow comparison of choices. Booking via a holiday company reduces dissatisfaction further (just 2% dissatisfied). In contrast, those who flew for business, on Flybe or who booked via a travel agent show increased dissatisfaction with information sourcing (10%, 12% and 7% dissatisfied respectively).
- Satisfaction with choice of airport has increased since last wave and is amongst the highest for those flying from Leeds and Manchester (85% and 82% respectively). Those flying from Gatwick are less satisfied (63%).
- Those booking face to face (79%), through a holiday company (75%) and who flew with Thomson (81%) are more satisfied with airport choice. However, this is still more of a challenge for PRMs (64% satisfied) and further still for those with difficulties who do not need assistance (44% satisfied).
- There is some limitation in terms of choice based on region. Those resident in Scotland register higher levels of dissatisfaction for both airport (17%) and airline (22%) choice. In contrast those in the North West are more satisfied on both measures (80% and 71% satisfied).
- Satisfaction with airline choice varies across airlines, with Virgin Atlantic flyers amongst the most satisfied (75%) and Ryanair and Flybe passengers amongst the most dissatisfied (18% and 31% respectively).
- Ratings of airline choice are higher amongst those flying premium economy (76%) and those booking face to face (just 5% dissatisfied). However, this drops amongst those taking a domestic flight (54%).

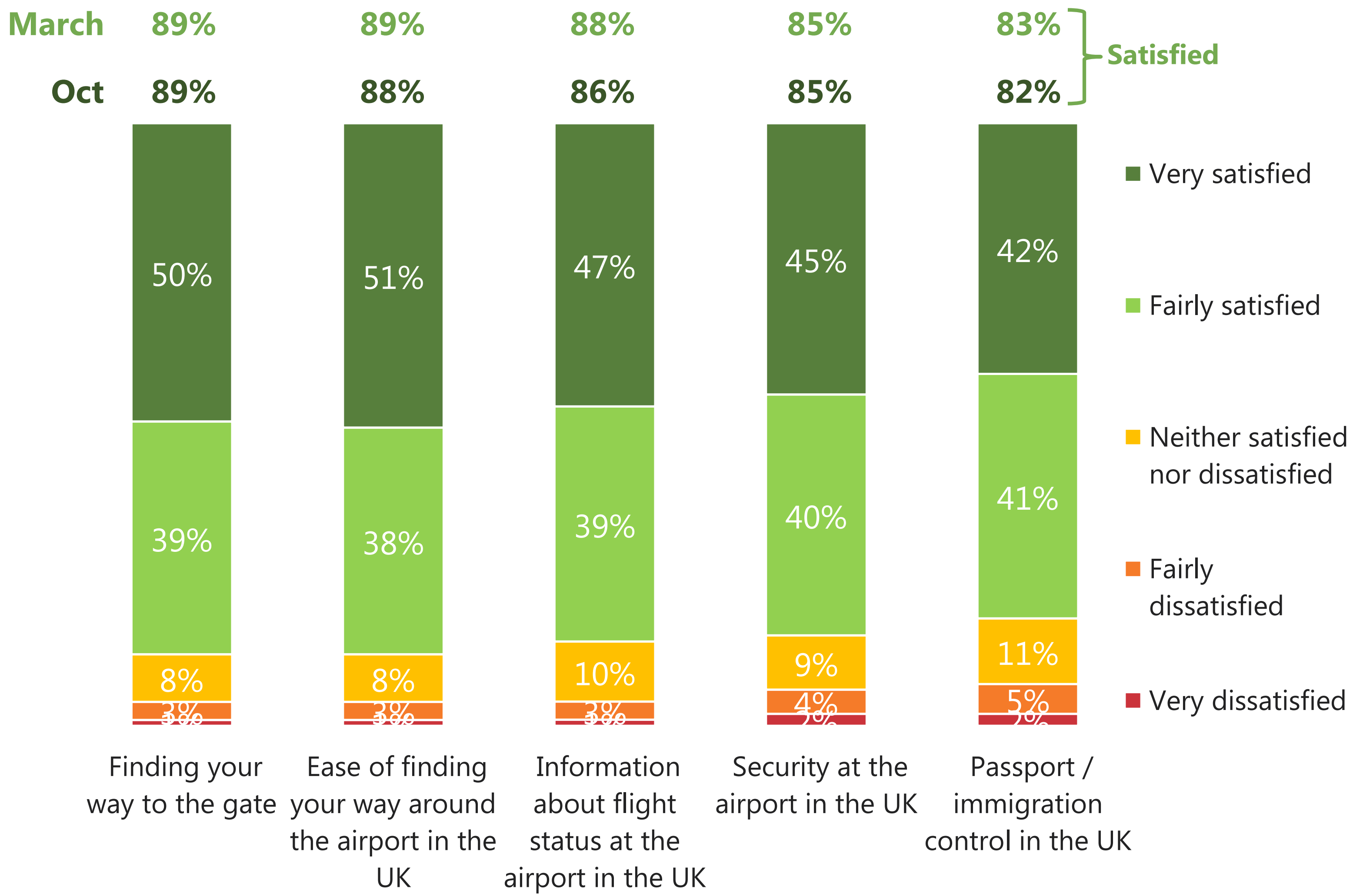
Ipsos Loyalty

Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (1,686 - 1710)

Civil Aviation Authority

Last flight: Satisfaction with airport experience

The airport experience continues to be viewed positively, satisfaction falls slightly for Security and the check-in process



- Satisfaction with navigation around the airport remains positive. However, it is lower amongst PRMs, more notably those who find flying difficult and in particular those that do not require assistance (69% satisfied with finding gate; 66% finding way around airport).
- Those flying in premium cabin class have a less positive view of finding their way around (77%) and to the gate (82%).
- Satisfaction with security is notably compromised amongst PRMs with non-physical conditions (76% satisfied). PRMs are also less satisfied with check-in (76% satisfied) and flight status information (81%), again this deteriorates amongst those with travel difficulties and further still if no assistance is required (67%).
- Those who flew from Stansted and those making a domestic flight find the airport security less satisfying (76% and 80% respectively). More frequent flyers (4+ times in last year) and those flying for business reasons express higher levels of dissatisfaction with security (9% and 13% dissatisfied).
- Those flying from Gatwick have rated flight status information lower (82% satisfied). Where Stansted falls behind for check-in (71% satisfied) other large airports (86%), particularly Manchester (88%), performs well.
- Those experiencing disruption find challenges across all aspects of the airport experience. In contrast women and the over 65s are more positive across most measures.

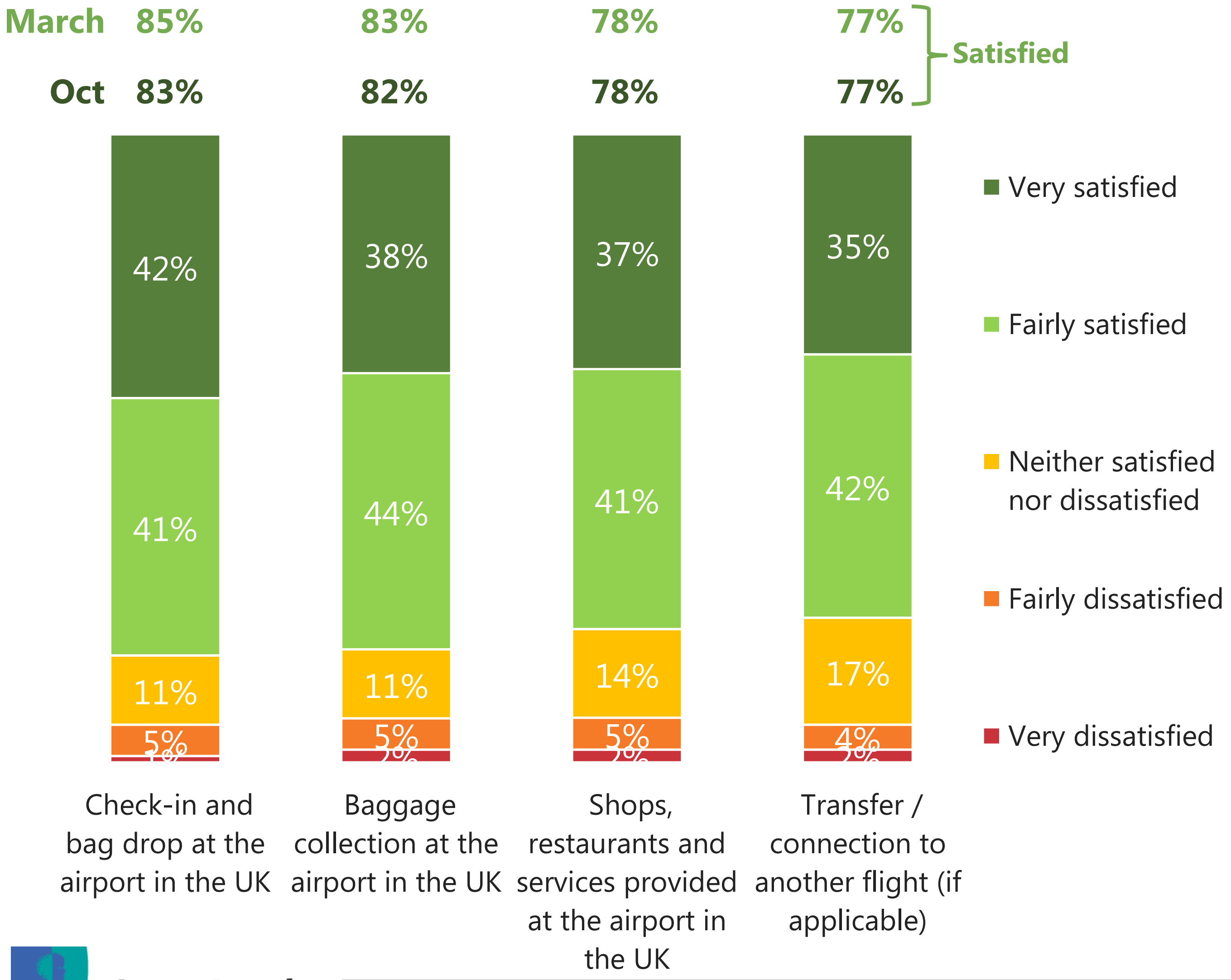
Ipsos Loyalty

Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (1,837- 1,951) *Other large airports (serving over 5m passengers per annum) includes Manchester, Birmingham, Stansted, Edinburgh, Glasgow, Bristol, Luton , **All other airports excludes Gatwick, Heathrow and other large airports

Civil Aviation Authority

Last flight: Satisfaction with airport experience

The shops and transfer are viewed slightly less favourably than other aspects of the airport experience but satisfaction continue to exceed three quarters of recent flyers.



- Check-in and baggage collection are still top performing areas when considering the operational elements of the airport.
- PRMs are consistently amongst those least satisfied for most touchpoints within the airport; check-in (76% satisfied), shops (73%, 69% non-physical) and transfer (66%, 57% non-physical).
- Check-in and bag drop is viewed more positively amongst those travelling from Manchester (88% satisfied) and Other large airports (86%). There are challenges at Stansted, where check-in satisfaction falls to 71% and Leeds showing lower satisfaction with baggage reclaim (70%).
- Airlines flown with can also impact, with Emirates flyers rating the check-in experience lower (72% satisfied) and Virgin Atlantic flyers responding more positively here (94% satisfied).
- Those flying from Luton record higher dissatisfaction with the shops at the airport (18% dissatisfied).
- In general women are more positive about the shopping available (81% satisfied, compared to 75% of men).
- Those flying in premium class and those who received assistance last flight register higher dissatisfaction with the transfer (13% and 17% dissatisfied).

Ipsos Loyalty

Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (706 - 1,951)

Civil Aviation Authority

Last flight: Satisfaction with elements of the journey

Satisfaction with each element of airport experience

	Overall	Gatwick	Heathrow	Other large airports*	Other airports*
Travelling to and from the airport	84%	**80%**	84%	85%	87%
Recent airport experience	81%	77%	80%	83%	81%
Value for money	76%	76%	**66%**	78%	**80%**
Check in and bag drop	83%	83%	83%	**86%**	81%
Security	85%	84%	86%	87%	**82%**
Flight status information	86%	**82%**	88%	87%	86%
Finding way around airport	88%	86%	86%	89%	89%
Shops and restaurants	78%	79%	80%	79%	75%
Finding gates	89%	87%	91%	90%	88%
Baggage collection	82%	81%	84%	82%	81%

Significantly higher than overall	**Significantly lower than overall**

**Other large airports refer to those serving over 5m passengers per annum, including Manchester, Birmingham, Stansted, Edinburgh, Glasgow, Bristol and Luton. Other airports refer to those serving less than 5m passengers per annum.*

Ipsos Loyalty

Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: Passengers using each airport on most recent flight (Overall: 1965, Gatwick: 354, Heathrow: 312, Other large airports: 841, Other airports: 452)

Civil Aviation Authority

Understanding dissatisfaction with travel experience

Poor service and communication contribute to dissatisfaction.

On arrival at XXXX Airport it was very difficult to find parking as it was so busy in the car park. At XXXX airport we were made to stand at the boarding gate for nearly an hour in hot weather. There were no seats. Security area was congested and treatment was invasive. The flight with XXXXX City Jet was cramped and catering poor. They had run out of basics such as milk for tea and coffee."

Paid extra for extra legroom seats only to be told that we did not have them. Staff rude and unhelpful, service on plane terrible both ways. Would never use XXXX again."

Outgoing flight boarding time was incorrect. Was told that boarding would be 35 minutes before departure but this was actually 10 minutes without any verbal announcement. Return flight was delayed with the information on screen constantly saying 'gate will be announced in 5 minutes' even when 5 minutes was up."

On a XXXXX package you are treated like cattle from the time you arrive at the airport right the way through to arriving at the accommodation."

Not able to be comfortable on flights despite paying extra for premium economy, having to choose between a vegetarian meal or a nut free meal, when I'm vegetarian with a severe nut allergy, rude unhelpful cabin crew."

Generally speaking, the manner in which we were treated by airport and airline staff was dissatisfactory. In particular, regarding seating arrangements and security checks."

There were communication problems and differences between what the aircrew said and the ground staff said. Seating was not comfortable for the connection flights! Facilities at the airport were very limited."

Ipsos Loyalty

Q62. Why were you dissatisfied with the overall travel experience? Please tell us about any issues you had? Base: Dissatisfied recent flyers.

Civil Aviation Authority

Disruption and complaint handling

Ipsos Loyalty

Disruption and complaint handling - summary

The biggest cause of disruption is long queues and overcrowding at the airport. Satisfaction with aspects of problem handling is typically quite low, however, the majority of complaints are not escalated further.

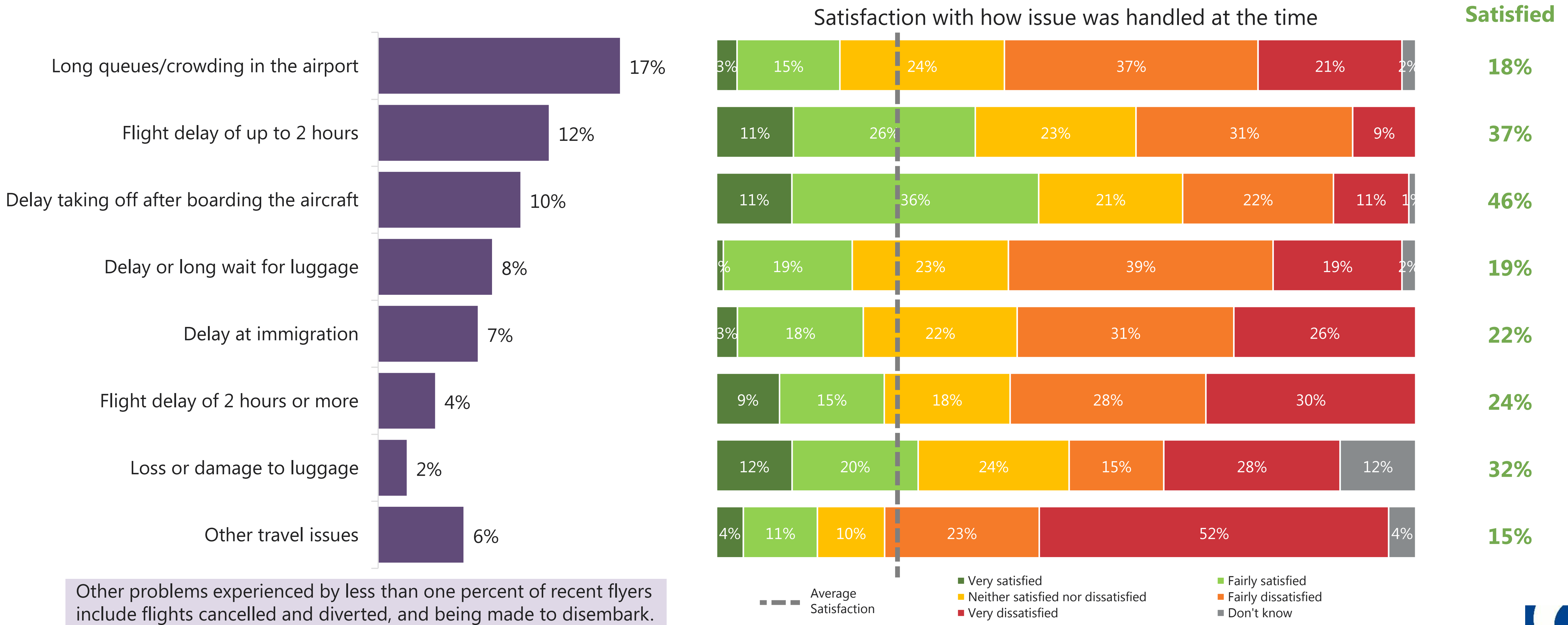
- **Three in ten (31%) of those who experienced disruption are unaware of the cause of the disruption.**
  - The most common types of disruption experienced were long queues at the airport (17%), a flight delay of up to two hours (12%, increasing to 16% at Gatwick) and a delay in taking off after boarding (10%)
- **Satisfaction with types of disruption is mixed, though fewer than half are satisfied across all types measured.**
  - The highest rates of dissatisfaction with disruption occur when there are long queues or crowding at the airport (58% dissatisfied), a delay or long wait for luggage (also 58%) or a delay at immigration (56%).
  - Satisfaction with the extent to which the effects of disruption where mitigated (information and updates provided, arrangements made to look after passengers, the outcome of complaints), with between three in ten and four in ten dissatisfied with these aspects.
  - When looking at experience of disruption, satisfaction is also quite low (38% are dissatisfied with arrangements made to look after passengers, 35% are dissatisfied with information and updates provided and 29% are dissatisfied with the outcome of any complaints), although the majority of complaints (84%) are not escalated to a third party as part of an alternative dispute resolution (ADR).

Ipsos Loyalty

Civil Aviation Authority

Last flight: Travel disruption

Long queues and crowding in the airport is the most commonly experienced disruption, and almost three in five travellers are dissatisfied with how this is handled. Travellers experiencing delays of two hours are more significantly more dissatisfied than those facing shorter delays.



Other problems experienced by less than one percent of recent flyers include flights cancelled and diverted, and being made to disembark.

Ipsos Loyalty

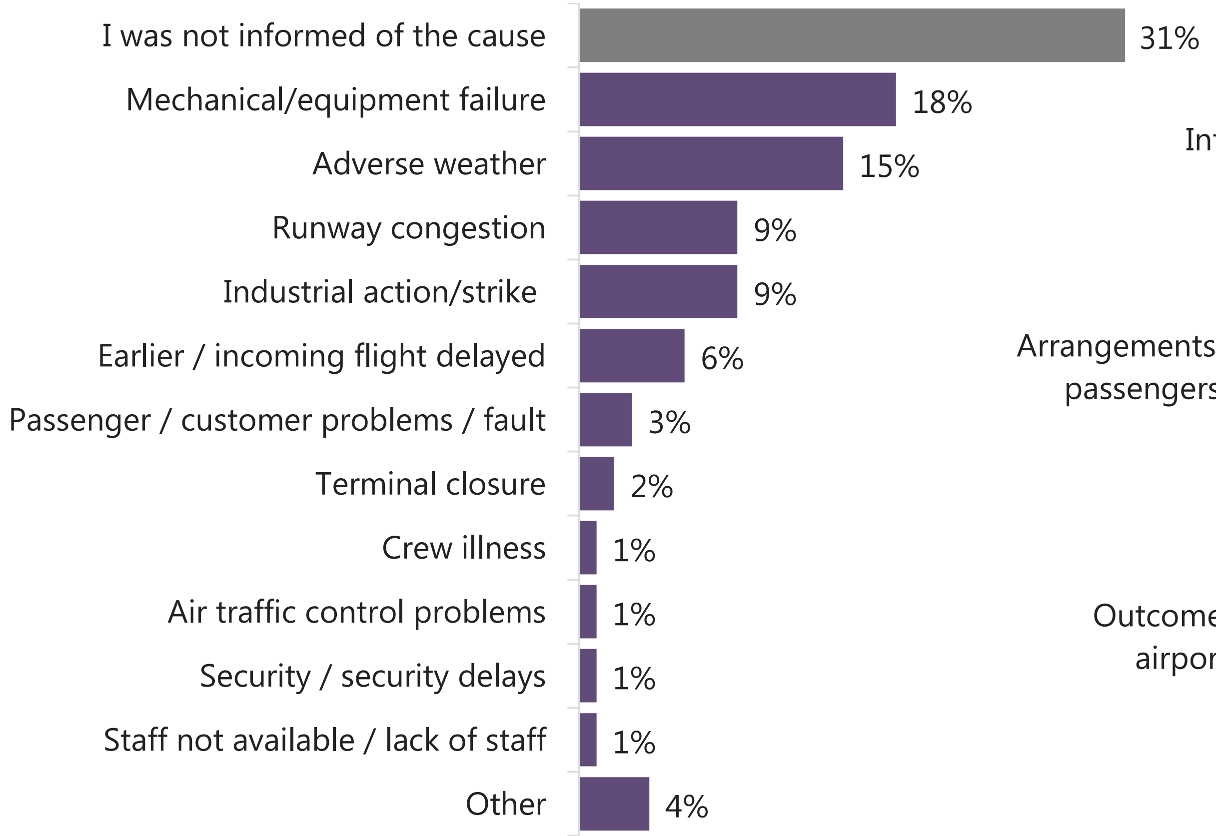
Q80. During the most recent journey, did you experience any of the following types of travel problem? Base: All who have flown in the last 12 months (1,965) | Q81. Satisfaction with the handling of each travel problem. Base: All who have flown in the last 12 months and experienced a travel problem (46-331)

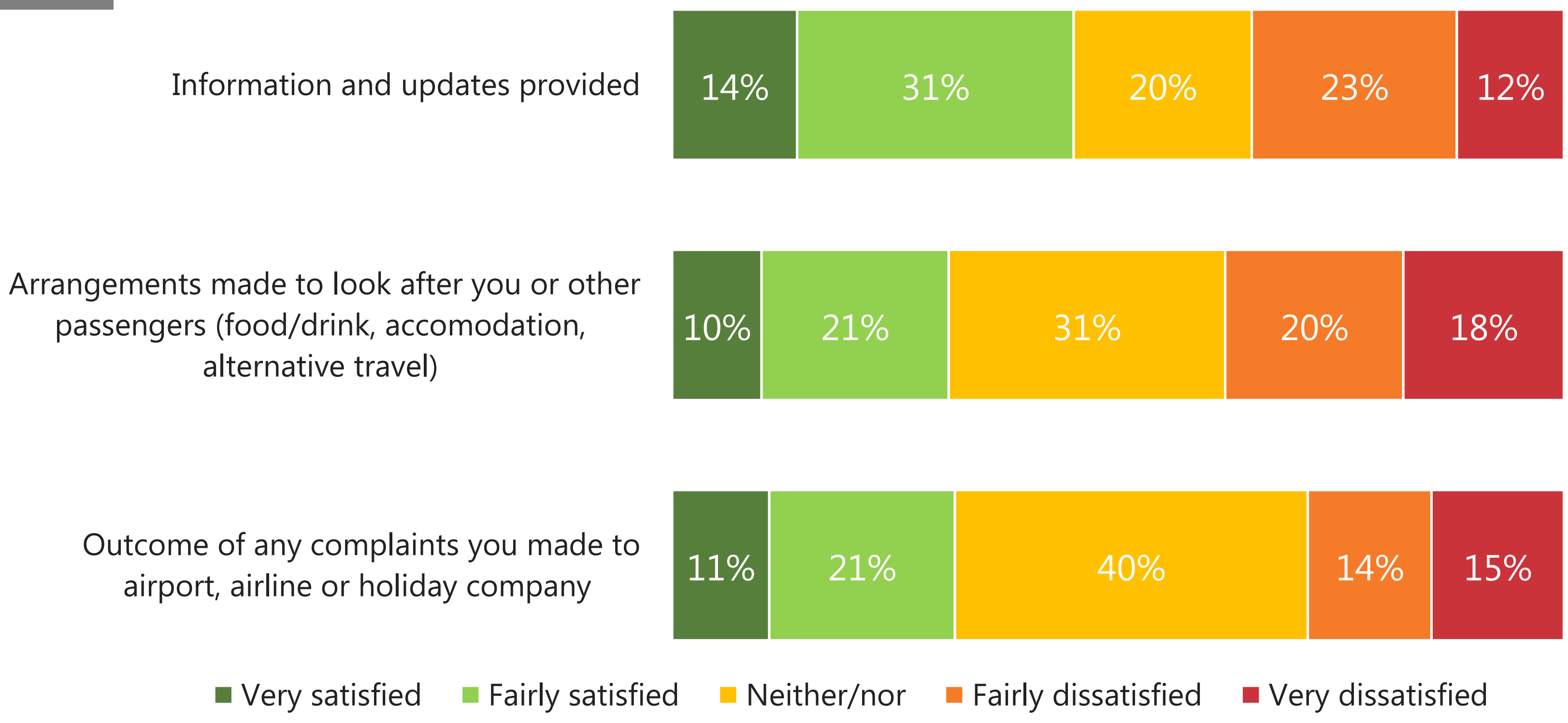
Civil Aviation Authority

Last flight: Travel disruption

Almost one third of passengers experiencing disruption are not informed of the cause, and less than half are satisfied with information and updates provided.

Causes of disruption and satisfaction with problem handling





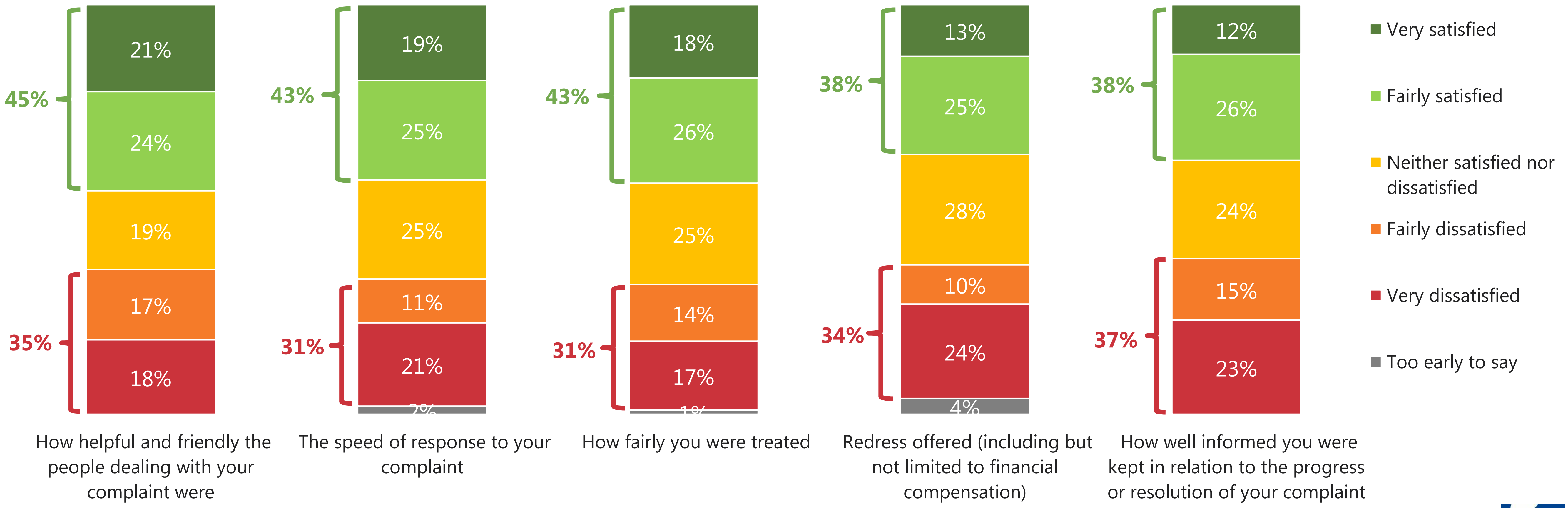
Ipsos Loyalty

Q80b. What was the cause of the delay to your recent flight? Base: All who have flown experienced disruption on last flight (299) | Q83. How satisfied or dissatisfied were you with the following aspects in terms of your flight problem? Base: All who have flown in the last 12 months and experienced any travel problem exc. DK (844)

Civil Aviation Authority

Satisfaction with complaint handling aspects

Around two fifths are happy with how complaints to the airport, airline or holiday company are handled, with around a third dissatisfied. Dissatisfaction peaks surrounding provision of information during the process.



Ipsos Loyalty

Q84. Thinking more specifically about any complaints you made to the airport, airline or holiday company about the travel issue, how satisfied or dissatisfied were with the following aspects? Base: All participants who experienced a travel problem and commented about their complaint (207-229)

Civil Aviation Authority

Understanding dissatisfaction with handling of problems

A lack of communication is a key cause of dissatisfaction amongst those experience disruption.

We were not told why the flight was delayed and made to stand for an hour at the departure gate in hot weather."

Had to sit on aircraft for 2 hours, very hot and no facilities to get a drink or food, eventually after 1 hour water was passed around but only after asking."

Each flight seemed to be delayed and there was no real explanation. For one connecting flight I was told I couldn't get on the next flight because of the delay in arrival-team helpfully sorted this but when I got to the gate the flight was delayed by at least another half hour, making the initial refusal to allow me on nonsensical."

We weren't really kept informed about what was happening."

The passengers were not kept informed of the delay. We were in the airport for 10 hours before we were told our flight was cancelled. As we were not on a package we were last in the queue to be sorted out and were not given adequate accommodation for a family (only 2 single beds between 3 of us, beds were wet) It was all too much at 2am. The next day we had to attend several meetings before we knew when we would eventually go home."

No information given about delay until boarded."

Ipsos Loyalty

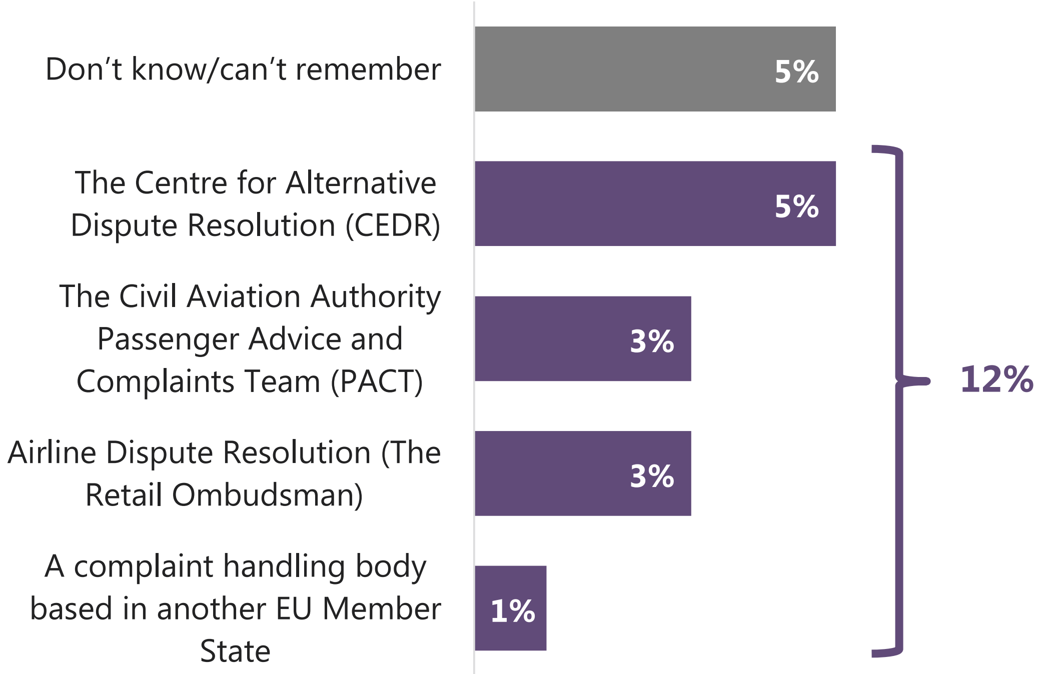
Q82. Why were you dissatisfied with the way your flight problem(s) was handled? Base: Recent flyers who were dissatisfied with how problem was handled.

ADR complaint handling

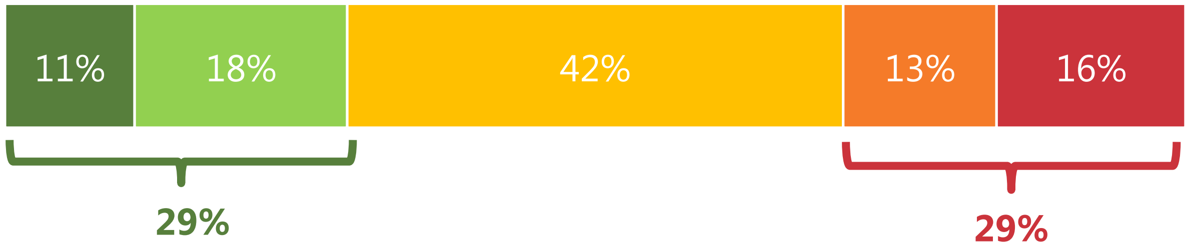
The vast majority did not escalate their complaint to a third party. However, this does not mean that the majority of flyers who complain are satisfied with the outcome of their complaint: three in ten remain dissatisfied.

84% did not escalate to any other organisation

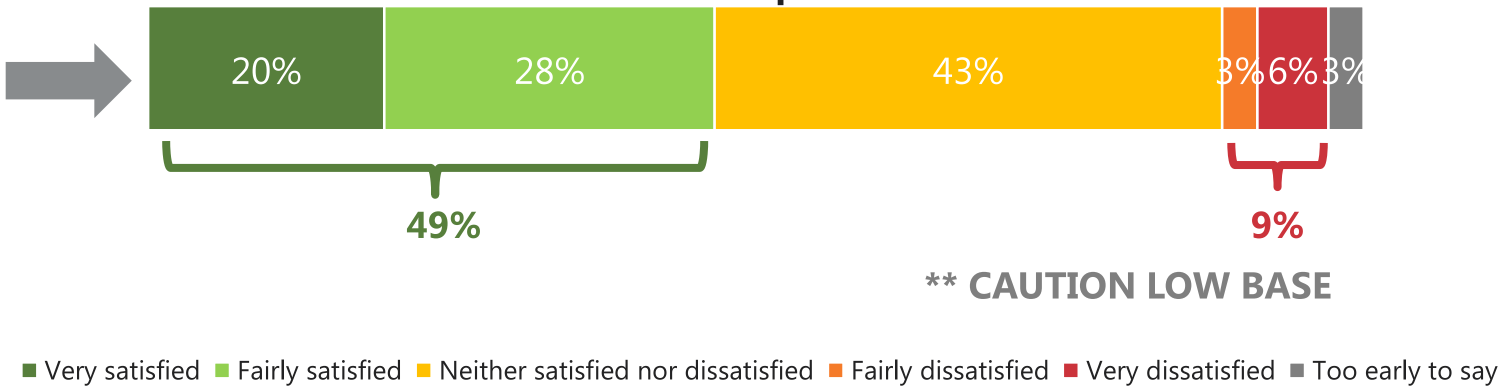
% escalating complaint to third party



Satisfaction with outcome of the complaint amongst those who did not escalate to another organisation



Satisfaction with complaint handling amongst those who escalated their complaint**

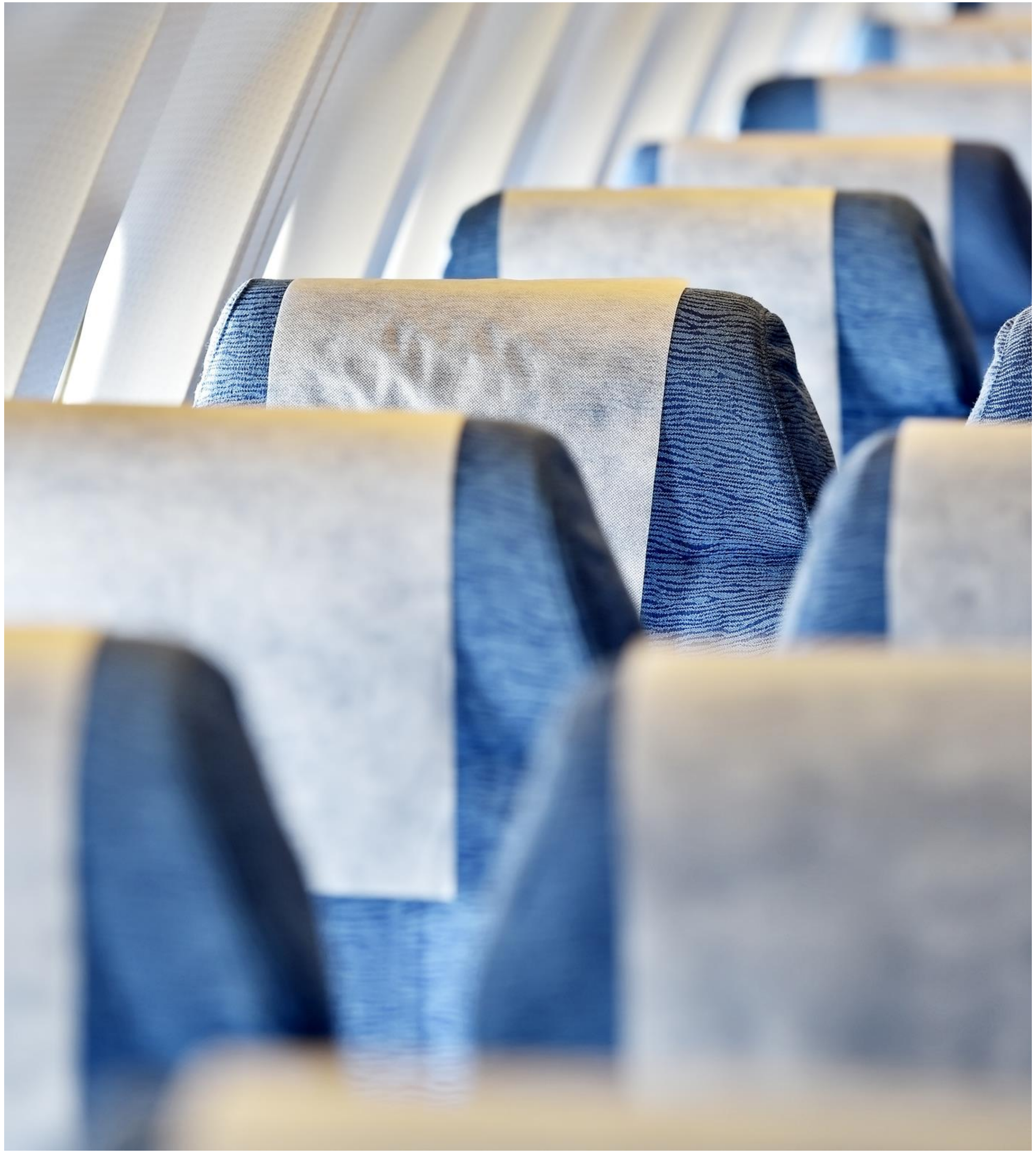


Q83d. How satisfied or dissatisfied were you with the following aspects in terms of your flight problem? Base: Flyers who complained to their airline, airport or holiday company but did not escalate it to a third party (260); Q85. Did you escalate your complaint or problem to any of the following organisations following after your recent flight experience? Base: All participants who commented about complaint (310); Q86, Overall how satisfied or dissatisfied have you been with the way your complaint was handled by ...? Base: All participants who escalated complaint to a third party (36** CAUTION LOW BASE)

Ipsos Loyalty

Experience of PRM

Ipsos Loyalty



Experience of PRM - summary

There continue to be perceived barriers for many PRM in relation to their disability/health condition, however many do have access to flying. PRM tend to be satisfied with the assistance received when they do fly and be more optimistic about future travel, however there is room for improvement

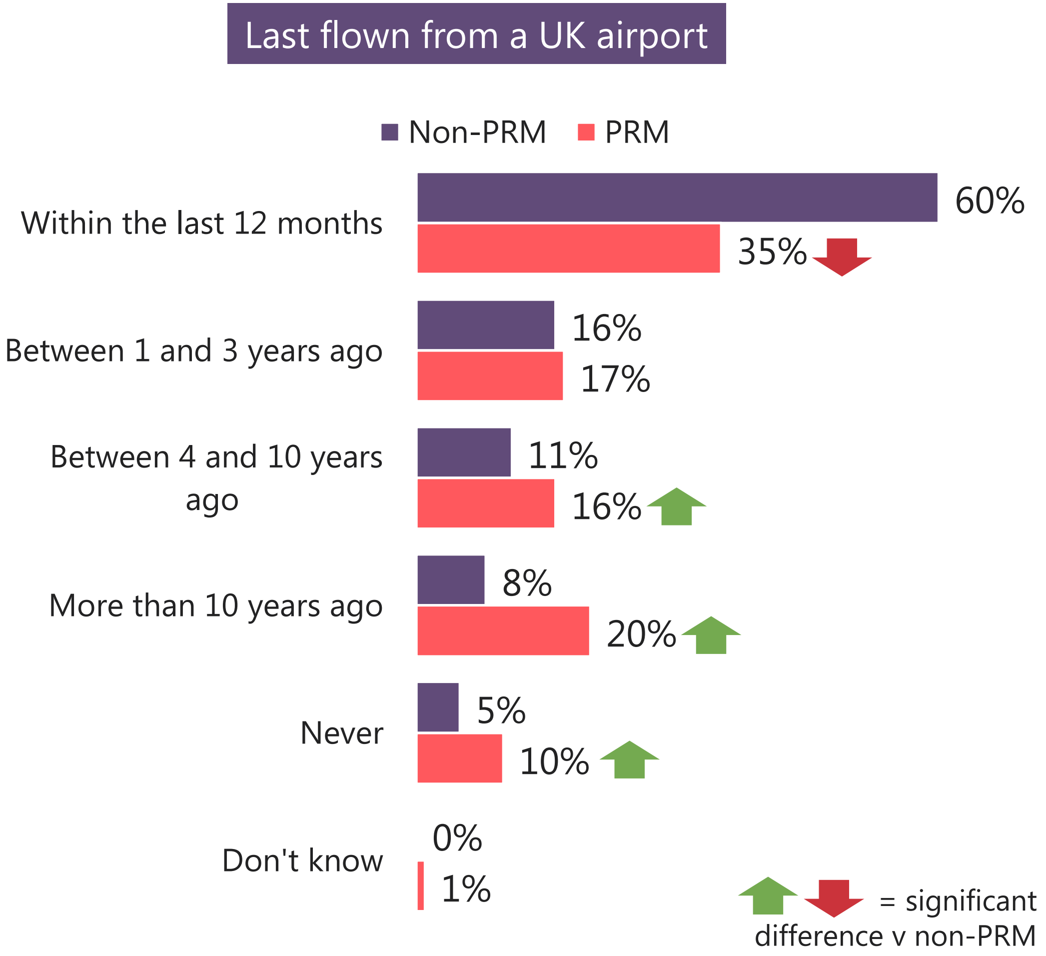
- **There are differences in flight behaviour between PRM and UK consumers overall. Only 35% have taken a flight in the last 12 months compared with 55% overall and one in ten PRMs have never flown compared to 6% national average. This is in line with the findings from the first wave of research.**
  - Although the most commonly mentioned barrier to travel amongst PRM remains cost (40%, in line with overall consumers at 42%), health and disability issues affecting the flight (28%) and airport experience (27%) make up the top 3 barriers amongst PRM.
  - PRM are less satisfied with the overall travel experience than non PRM (83% satisfied compared to 89%). This difference is also seen in the airport experience in the UK (75% compared to 82%) and also across several aspects of the airport experience.
- **Satisfaction with assistance for PRM is high across the journey.**
  - Almost two thirds (65%) of PRM who require assistance request it at the time of booking, however 11% do not request any assistance beforehand.
  - Satisfaction with pre-booking assistance continues to be the top ranked point of the journey for assistance (87%). Perceptions of assistance received remain fairly positive throughout the rest of the journey
- **Generally PRMs have positive expectations about future flying experiences and tend to be more optimistic if they have taken a recent flight; however there remains a sizeable group with more negative expectations, particularly those with a non-physical disability.**
  - Almost six in ten (59%) believe that they will have the opportunity to ask for assistance when they book, rising to 66% of those who required assistance on their last flight.
  - Two thirds (66%) of PRMs think they will be given the opportunity to request assistance when booking, however this rises to 75% of those with recent flying experience in the past twelve months. Similarly 69% of PRMs who have flown in the past 12 months believe they will be provided with information about their assistance, compared with 60% overall
  - Those with non-physical disabilities are least likely to feel that their needs will be met during the journey. Only 52% of this sub-group think they will be given the opportunity to ask for assistance whilst booking and 47% think their needs will be understood and passed onto the airline, compared with 66% and 59% of all PRMs respectively.

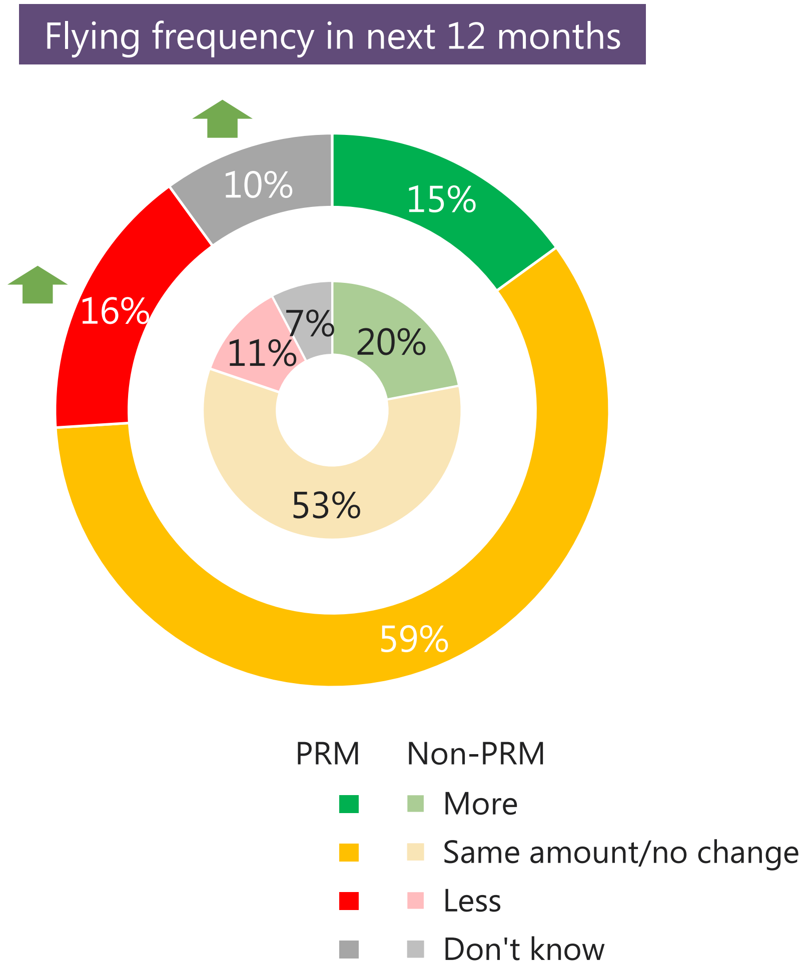
Ipsos Loyalty

Civil Aviation Authority

PRM: Flying behaviour overview

PRM are more likely to have never flown than UK consumers overall and less likely to have taken a flight recently.



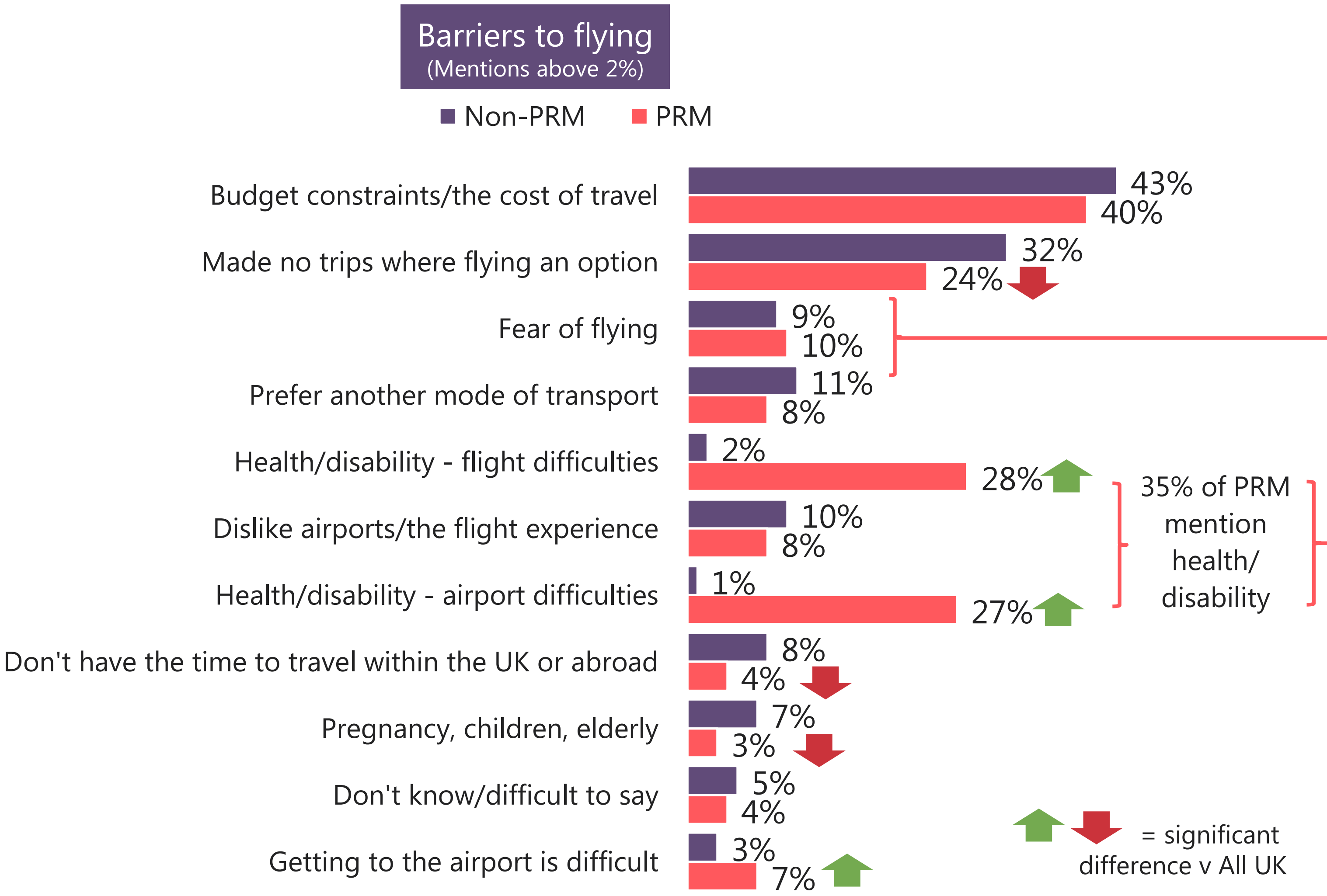


Ipsos Loyalty

Q10. When was the last time you flew from a UK airport?, Q13. In the next 12 months, do you expect that you will fly more, the same amount or less compared to now? Base: All participants (3,551), All PRM (674)

PRM: Flying behaviour overview

Health and disability issues and difficulty getting to the airport are more likely to be perceived barriers to flying for PRM than UK consumers overall.



The proportion of PRM mentioning fear of flying as a barrier has decreased from 15% in wave 1 to 10% in wave 2. This change is most pronounced among PRM with non-physical disabilities (decreasing from 20% to 11%. Among PRM with physical disabilities this has decreased from 13% to 9%).

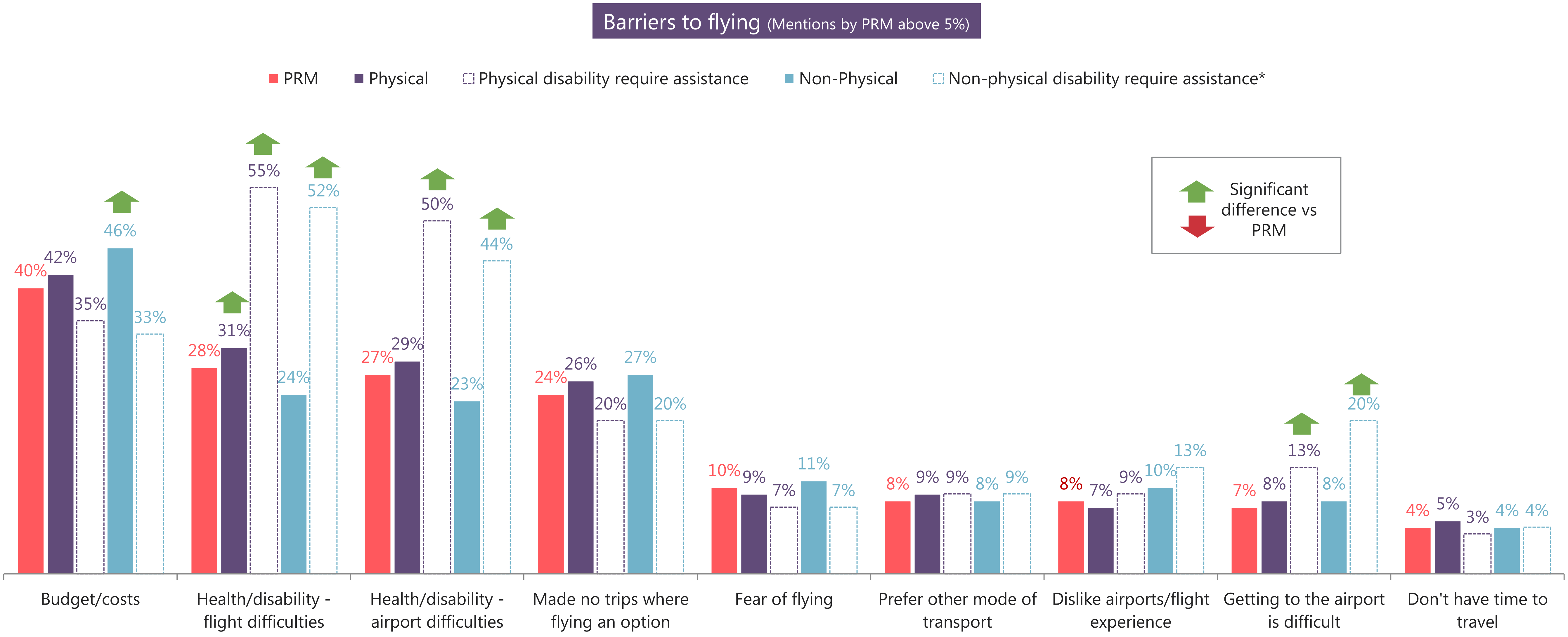
More of those with physical disabilities (38%, down from 41%) than those with non-physical disabilities (29%, down from 34%) mention that their health/disability is the reason that they haven't flown recently.

Ipsos Loyalty

Q20. Why have you not flown? Base : All who have not flown in the last 12 months (1,584), PRM (436)

Civil Aviation Authority

PRM: Barriers to Flying by segment



*** CAUTION LOW BASE**

Ipsos Loyalty

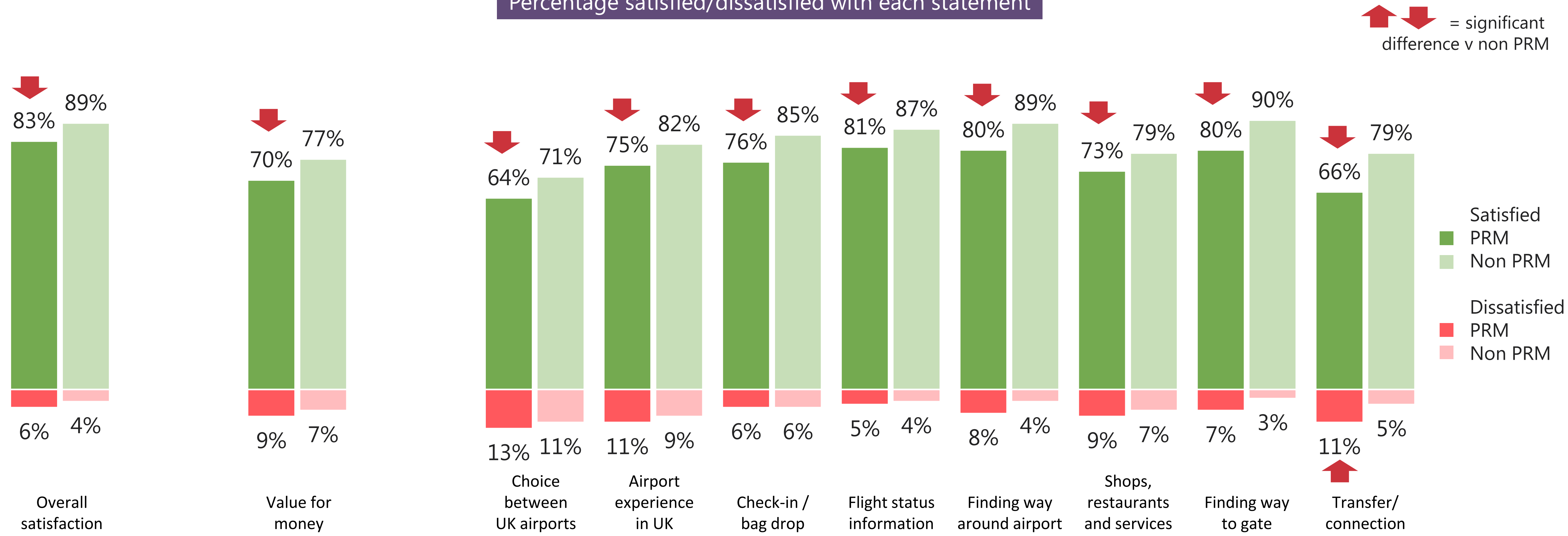
Q20. Why have you not flown? Base : those who have not flown in the last 12 months: PRM (438), non-PRM (1124), physical disability (323), non-physical disability (177), physical disability requiring assistance (141) and non-physical disability requiring assistance (54*).

Civil Aviation Authority

PRM: Differences compared to non-PRMs

PRM are less satisfied than non PRM at a number of aspects of the most recent flight.

Percentage satisfied/dissatisfied with each statement



Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK (PRM: 230-234, non PRM: 1,673 - 1,707). Q61. Now taking all the elements into account, how satisfied or dissatisfied were you with the overall travel experience on this most recent occasion? Base: All who have flown in the last 12 months exc. DK (PRM: 233, non PRM: 1,702). Q63. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, (PRM: 207-230, non PRM: 1,473-1,704) except 'Transfer/connection to another flight' (PRM: 87, non PRM: 611)

Ipsos Loyalty

The impact of flight frequency

- Flight frequency has a substantial impact on ratings across all recent flyers, and it is important to understand differences among PRM sub-groups. There are **substantial differences** among **PRMs** who have **flown once in the last year***, and those who **flew three or more times***.
- Among PRMs, **flight frequency does not impact on measures of overall satisfaction**. Overall ratings are lower among PRMs than non-PRMs whether they have flown once (82% compared to 87%), or three or more times (80% compared to 89%).
- For some aspects of recent experience, this trend is continued and ratings are lower regardless of whether PRMs have flown more in the last year, but for others this experience has an impact on perceptions and ratings of their experience.
- Broadly, **experience has a positive impact** on how aspects related to the **booking experience** are rated**,** but has **less of an impact** on ratings of aspects related to the **airport experience.**

*** CAUTION: LOW BASE**

- When deciding which flight to book, PRMs who have taken one flight in the last year are significantly less satisfied (71% satisfied) than non-PRMs who have flown once (82%) and three or more times (82%). Among PRMs with three or more flights, there is a directional increase compared to less frequent PRM flyers, but their ratings of this aspect (76%) lag behind non-PRMs who have flown once and more than three times.
- Amongst non-PRMs who have taken more than three flights in the last year, satisfaction with the process of booking is significantly higher (88%) than those who have flown once (82%) in the last year. This trend does not cross over amongst PRMs with more flight experience – only four in five of both groups are satisfied. Satisfaction is similar among PRM flyers whether they have flown once (81%) or three or more times in the last year (80%).
- Ratings of travelling back and forth from the airport are directionally lower among PRM flyers. Surface access is a particular issue for those who have flown three times or more, only 76% of whom are satisfied, compared to 85% of both non-PRMs who have flown once and those who have flown more than three times in the last year.

- PRMs who have flown three or more times in the last year are significantly less satisfied with the airport experience overall, with only 60% satisfied. Amongst non-PRM groups this figure is 83% (one flight in last year) and 80% (three flights or more in last year). Among PRMs who flew once in the last year, this figure is significantly higher (76%), indicating that those with greater experience become more critical of airports.
- This trend continues when looking at check in and bag drop. PRMs who have flown more are less satisfied (60%) than those who have only flown once (75%). Interestingly, non-PRMs who have flown three times or more in the last year are directionally less satisfied (76%) than those who have flown once (82%). There is a similar pattern with regards to baggage collection in the UK airport.
- Ratings of security, passport control, information about flight status, navigability (ease of finding the way around the airport and finding way to the gate) and shops, restaurants and services at the airport follow a slightly different pattern. PRMs who have taken more flights are no more or less satisfied than those who have taken only one and reflect a broader pattern where PRMs are less satisfied with the airport experience.

Ipsos Loyalty

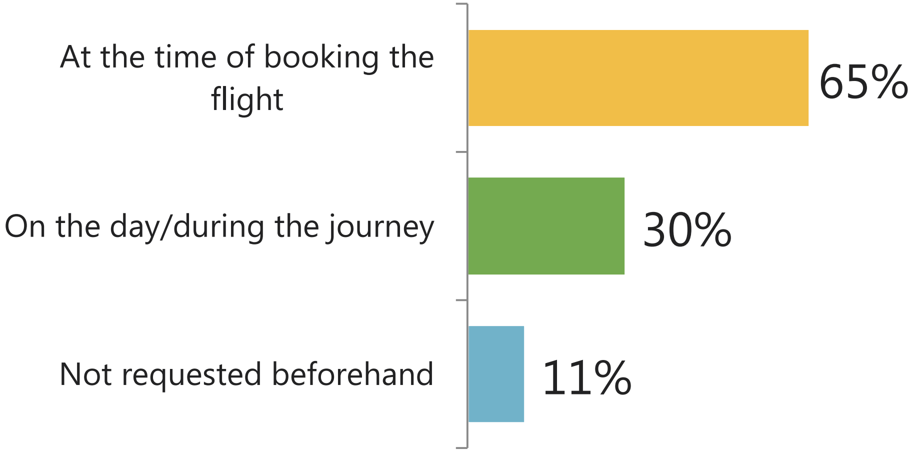
Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Q61. Now taking all the elements into account, how satisfied or dissatisfied were you with the overall travel experience on this most recent occasion? Q63. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied were you with the following elements? Base: PRM who flown once in the last year (91*), non-PRM who flown once in the last year (605), PRM who flown three or more times in the last year (56*), non-PRM who flown three or more times in the last year (610). *Caution: low base.

Satisfaction with assistance received

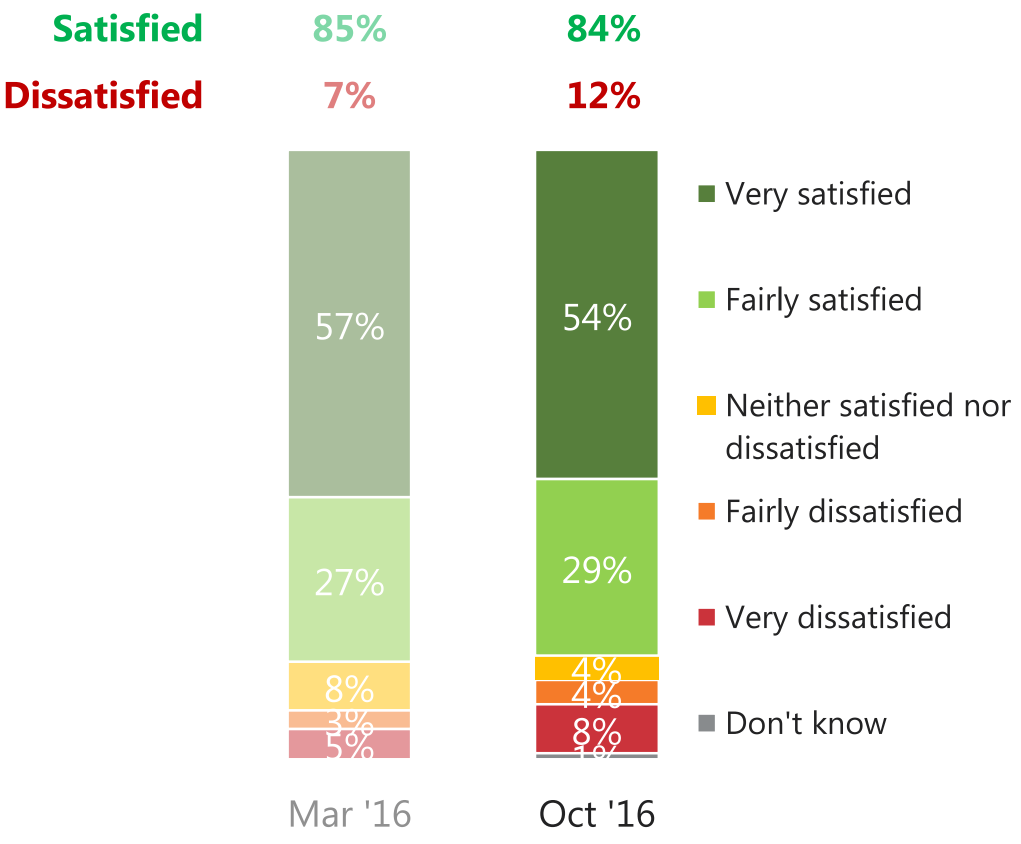
Dissatisfaction with assistance has directionally increased since March 2016.

7% of those who flew in the last 12 months required assistance for themselves or a member of their party.

How assistance was requested?



Overall satisfaction with assistance received



Ipsos Loyalty

Q70. During this recent flight did you actually request assistance either from the airport, airline or holiday company? Base: All PRM who have flown in the last 12 months and required assistance, exc. DK and N/A (156). Q71. How satisfied or dissatisfied were you with the assistance you received overall? Base: All PRM who have flown in the last 12 months who required and requested assistance exc. DK and N/A (139)

Understanding dissatisfaction with the assistance

Failing to meet customers' required assistance is frequently mentioned in relation to dissatisfaction.

XXXX ignored my every attempt of request and even on one occasion turned their head away and dismissed me like I was a fly/pest!"

The airport assistance staff do not seem to care. I think there are probably not enough of them to give proper service."

I was told to wait for my assistance to turn up and help me to my gate but no one did, which resulted in my nearly missing my flight to then be shouted at by a lady in the airport for making the plane late even though it was not my fault. When I landed at the other end the passenger assistance did not turn up at all and the duty manager from the airport ended up having to come and assist me off the plane."

On the way back I was told that there was a buggy waiting for me. There was a buggy but no driver. I waited and waited but no one came. I walked to passport control where another buggy driver told me were the assistance line was, but would not let me on the buggy. Eventually the border control staff member got the buggy driver to take me to luggage reclaim

I had to walk a long way to the aircraft departure as transport was not available on the day, despite asking for help at least two hours before departure. This was very poor service.

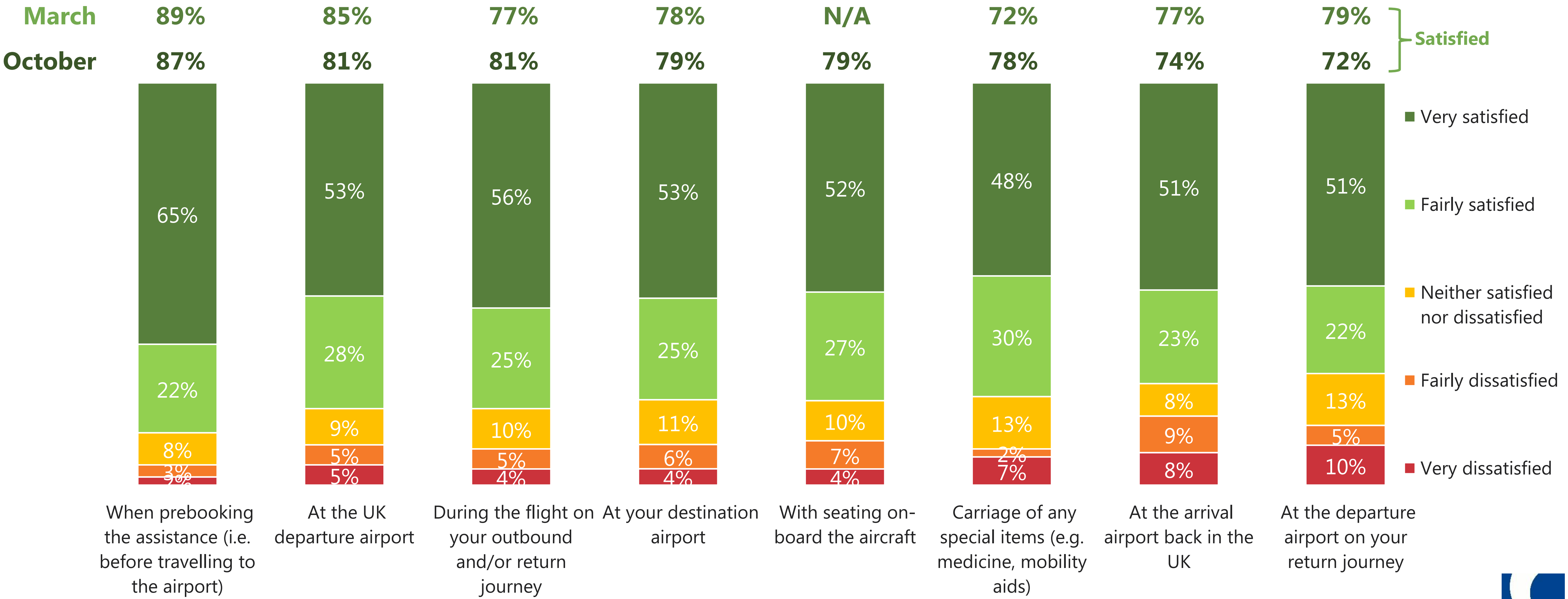
The airline forgot to book wheelchair , so we had to struggle."

Ipsos Loyalty

Q72. Why were you dissatisfied with the assistance? Please tell us about any issues you had? Base: Dissatisfied recent PRM flyers who requested assistance.

Satisfaction with assistance at each point in the journey

Satisfaction with pre-booking assistance continues to be the top ranked point of the journey for assistance.



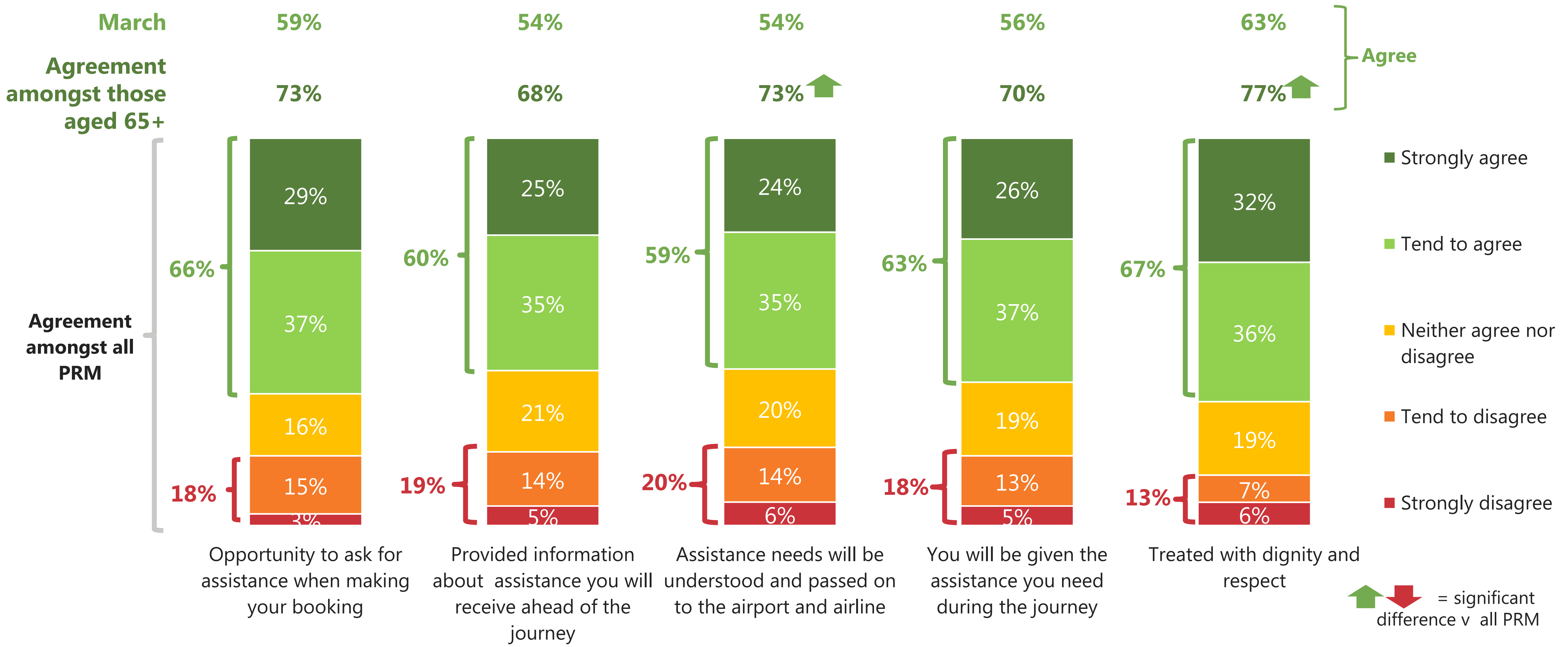
Ipsos Loyalty

Q73. How satisfied or dissatisfied were you with the assistance you received at each of these points in the journey? Base: Participants who have flown in the last 12 months and required and requested assistance, excl. DKs and NAs (109-131 except 'with seating on-board the aircraft' (87)).

Civil Aviation Authority

PRM expectations for future travel

Although most PRM passengers expect their disability or health conditions will be dealt with positively in the future, approximately one in five are more sceptical. The most positive age group continues to be those aged 65+

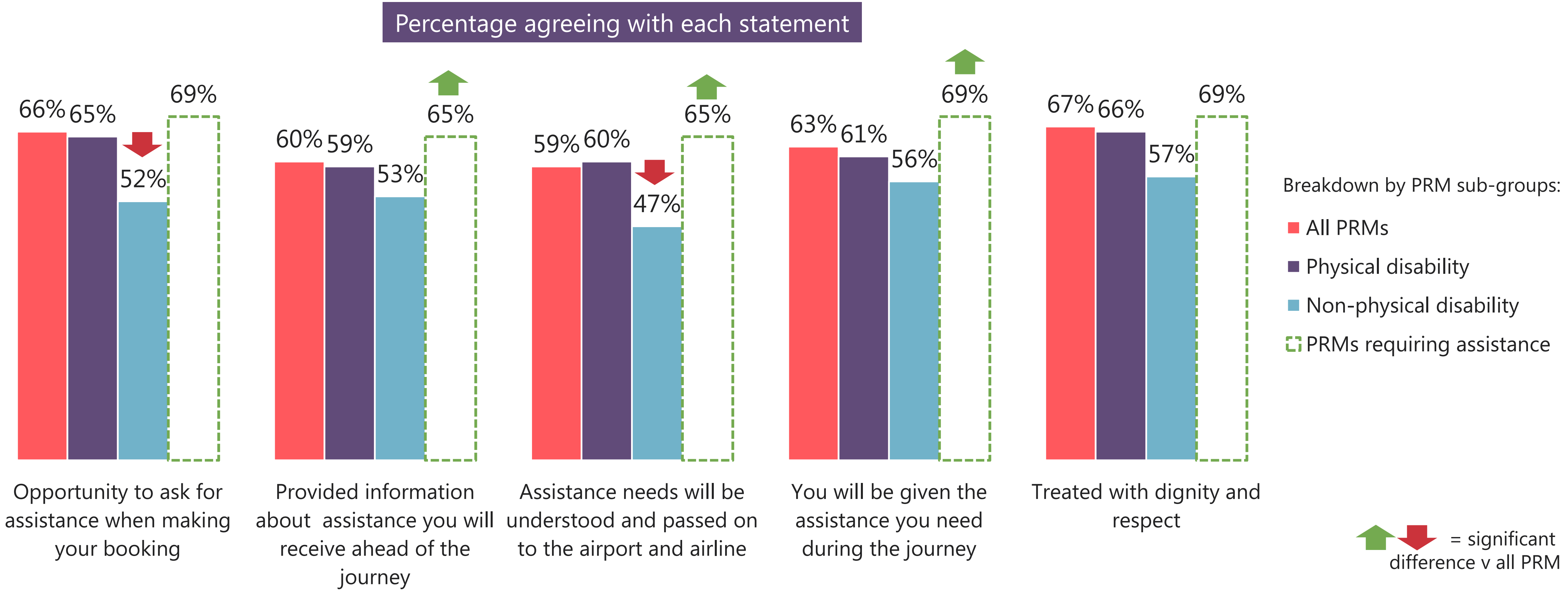


Q90. To what extend do you agree or disagree with each of these statements about how your disability or health condition needs will be dealt with if and when you next choose to fly? Base: PRM and flown in last 10 years, excl. DKs and NAs (194-204); PRM and flown in last 10 years aged 65+, excl. DKs and NAs (53-58).

Ipsos Loyalty

PRMs with physical and non-physical disabilities

PRM passengers who require assistance continue to be the most positive about future assistance, particularly information transmission and getting suitable assistance. Travellers with a non- physical disability continue to be the least positive.

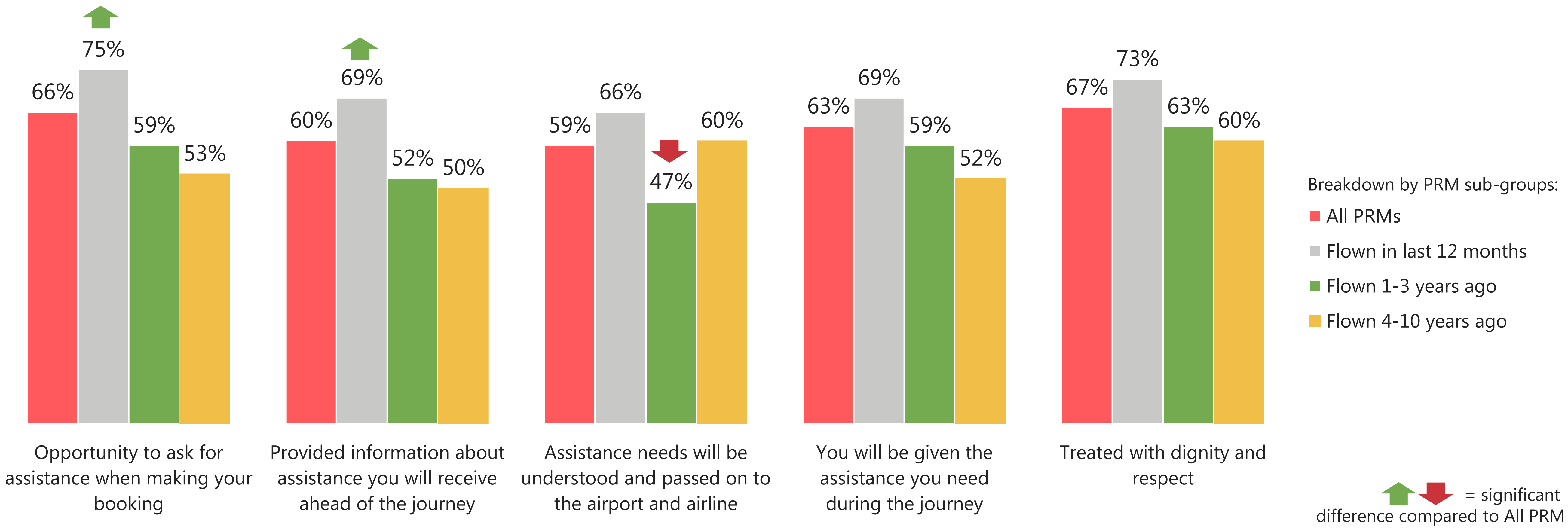


Q90. To what extend do you agree or disagree with each of these statements about how your disability or health condition needs will be dealt with if and when you next choose to fly? Base: PRM and flown in last 10 years, excl. DKs and NAs (194-204); PRM with physical disability, excl. DKs and NAs (156-164); PRM with non-physical disability, excl. DKs and NAs (49-52); PRM requiring assistance (135-142).

Ipsos Loyalty

PRMs with recent flight experience

PRM passengers who have taken a flight in the last year are more optimistic that their assistance needs will be catered for when flying in the future.



Ipsos Loyalty

Q90. To what extend do you agree or disagree with each of these statements about how your disability or health condition needs will be dealt with if and when you next choose to fly? Base: PRM and flown in last 10 years, excl. DKs and NAs (194-204); PRM flown in last 12 months, excl. DKs and NAs (101-104); PRM flown in last 1-3 years, excl. DKs and NAs (55-58); PRM flown in last 4-10 years (38-42).

Flight terms and conditions and ATOL protection

Ipsos Loyalty

Flight Ts and Cs and ATOL protection - summary

Awareness of different aspects of flight terms and conditions is varied. Awareness of ATOL and support for the protection it provides is high.

There is also support for extending the scheme or similar schemes being put in place.

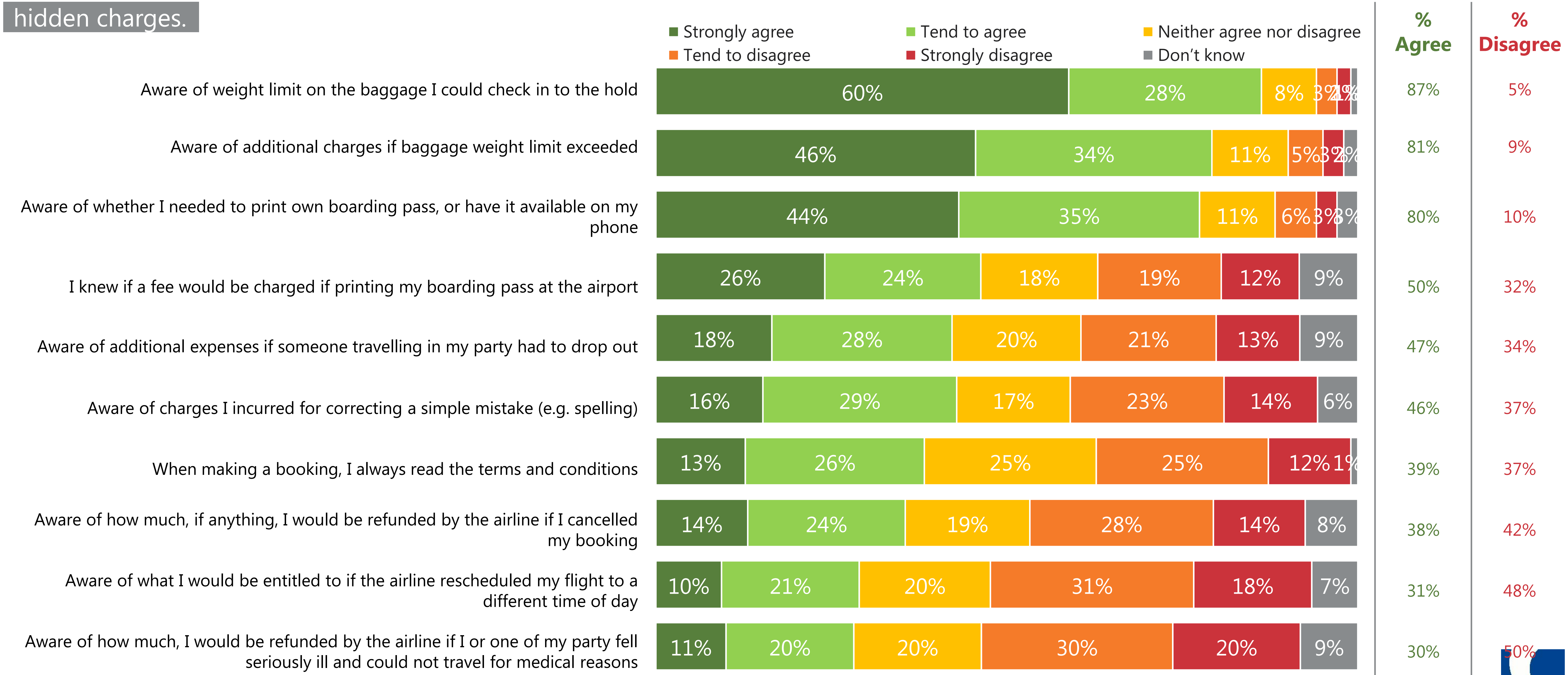
- **There is variation in the awareness of different aspects of flight terms and conditions.**
  - Flyers are generally aware of baggage weight limits, with 87% agreeing that they are aware of how much they could check into the hold. When asked about additional charges incurred if the baggage weight limit is exceeded, 81% state that they are aware. Most flyers (80%) are also aware of the format they are required to have their boarding pass in, whether that is printed or whether having it available on their phone.
  - There is low awareness of the extent of refund that is due if a member of the party falls ill and cannot travel for medical reasons (50% disagree they are aware of this) or of what customers are entitled to if an airline reschedules a flight to a different time of day (48% disagree).
  - A similar proportion agree that they always read the flight terms and conditions (39%) as disagree (37%). However, only 13% strongly agree that they always read the Terms and Conditions, indicating that the real proportion is much lower. PRM are more likely than average to agree they always read the Ts and Cs (47%).
- **After being given a description of ATOL protection nearly nine in ten (88%) agree that it is important that their holiday is ATOL protected, increasing to 95% among PRM with air travel difficulties.**
  - 72% of those that have flown in the last 12 months and whose most recent flight was for a holiday were aware of ATOL protection when they booked the holiday, and 64% of this group were certain that their holiday was ATOL protected.
- **Support for extending the ATOL scheme and similar schemes is high at eight in ten or more.**
  - Around two-thirds (68%) would be willing to pay more for protection that ensures a refund if a holiday company goes bankrupt, increasing to 78% of those whose last flight was booked through a holiday company.
  - However, nearly half (47%) would be happy to rely on their travel insurance if a travel company that is booked with goes bust, with a quarter (26%) disagreeing.

Ipsos Loyalty

Civil Aviation Authority

Awareness of terms and conditions

Awareness of baggage limits and boarding pass printing is high. However, very few always read T&Cs, and there is limited knowledge of hidden charges.



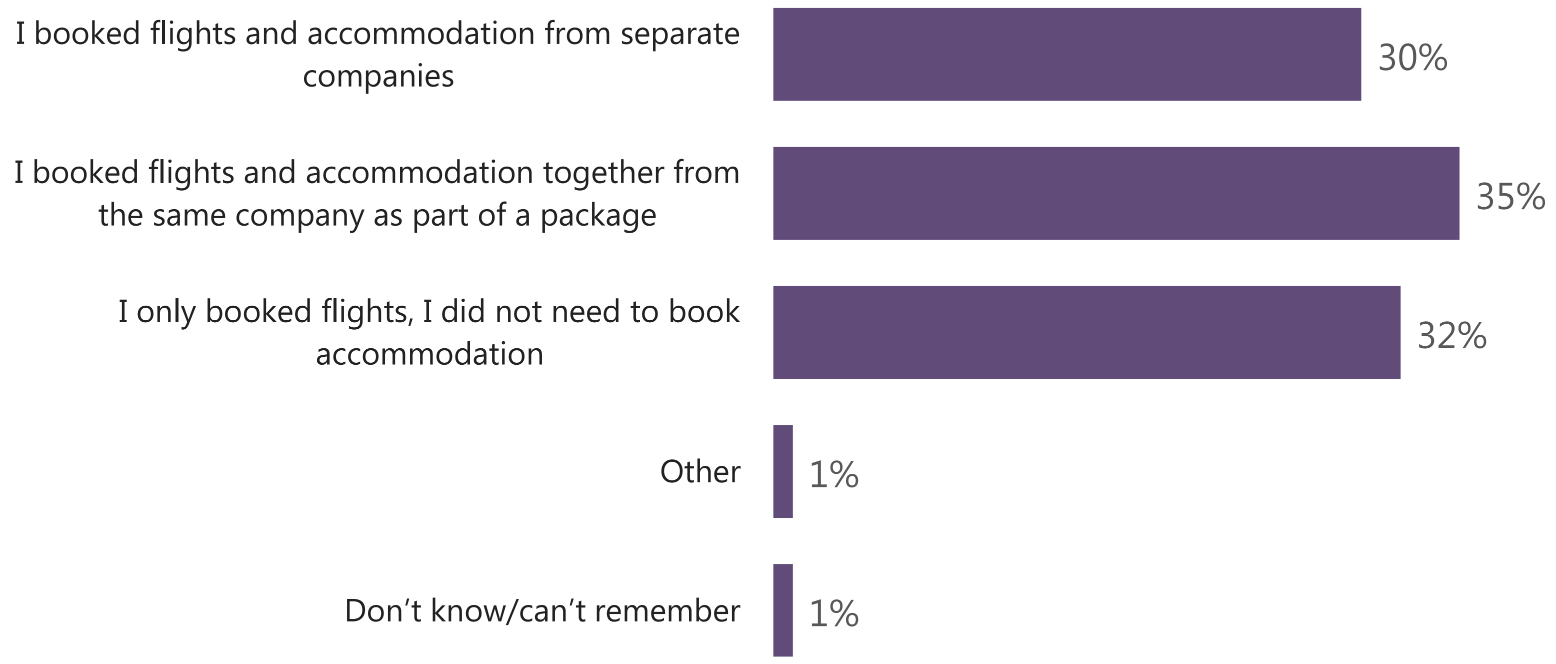
Ipsos Loyalty

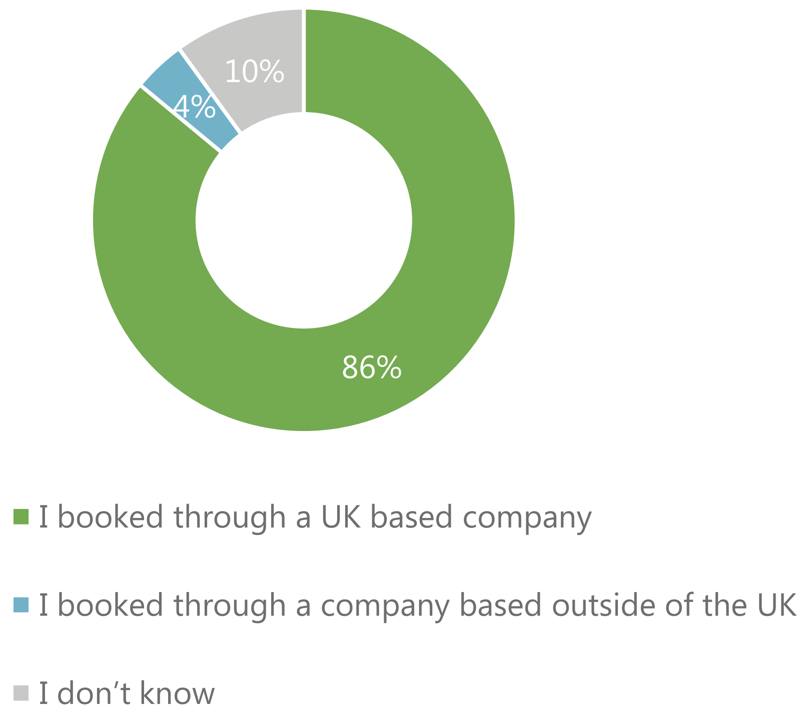
Q140. When booking a flight there are certain terms and conditions that you agree to. Thinking about flights you've made in the last three years, to what extent do you agree or disagree with each of these statements about any changes made to a flight or the booking details? Base: All participants who have flown in the last 3 years (2539)

Civil Aviation Authority

Flight and accommodation booking

There is a mix in terms of how the elements of a holiday have been booked, with around a third booking flights and accommodation separately, a third as a package and a third flights only. Most package holidays were booked through a UK based company.





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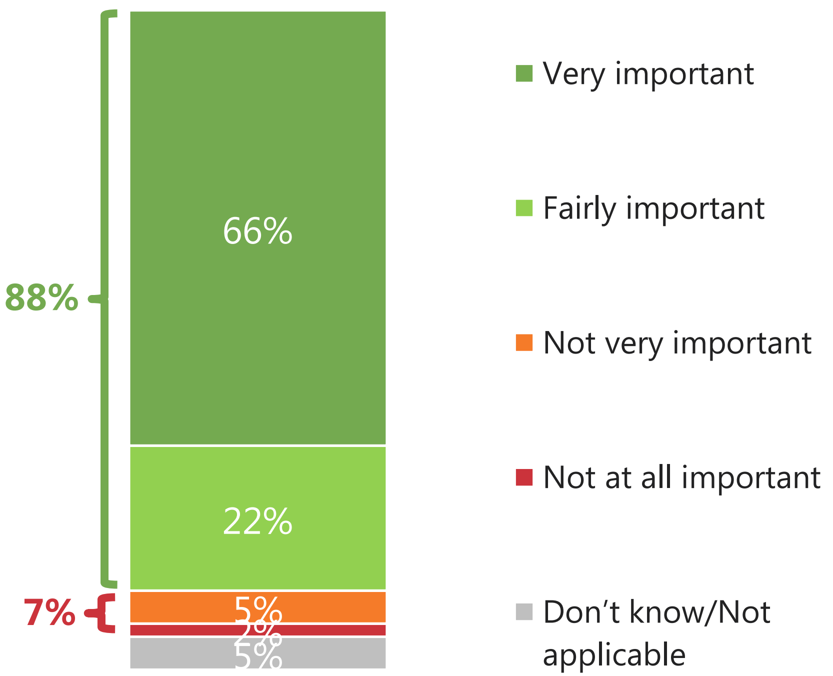
Q57b When booking your most recent trip, which of the following statements best applies to you? Base: All who have flown in the last 12 months (1,965) | Q57c When booking your trip, where was the company you booked through based? Base: All who booked as part of a package (687)

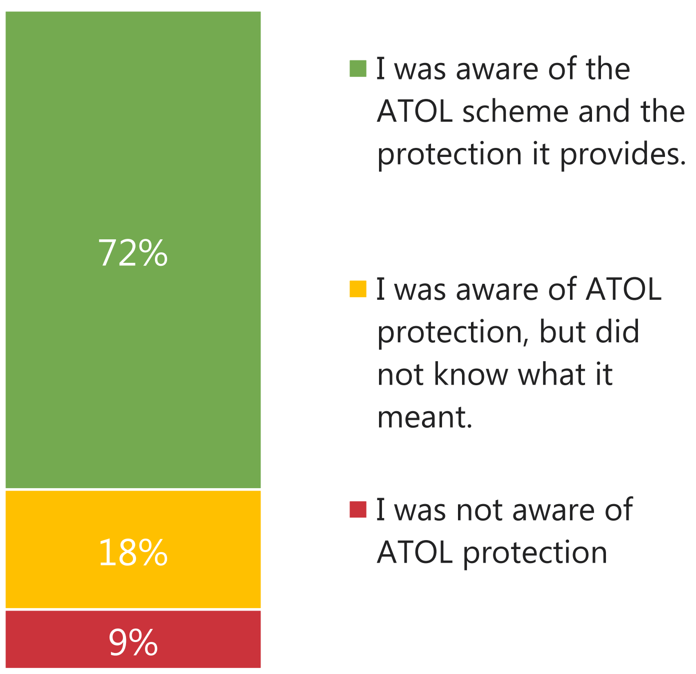
Importance, awareness and usage of ATOL

ATOL is perceived to be important by almost 9 out of 10. However, only 7 in 10 of recent holidaymakers were fully aware of the ATOL scheme protection and three quarters of those aware had ATOL protection on their last holiday.

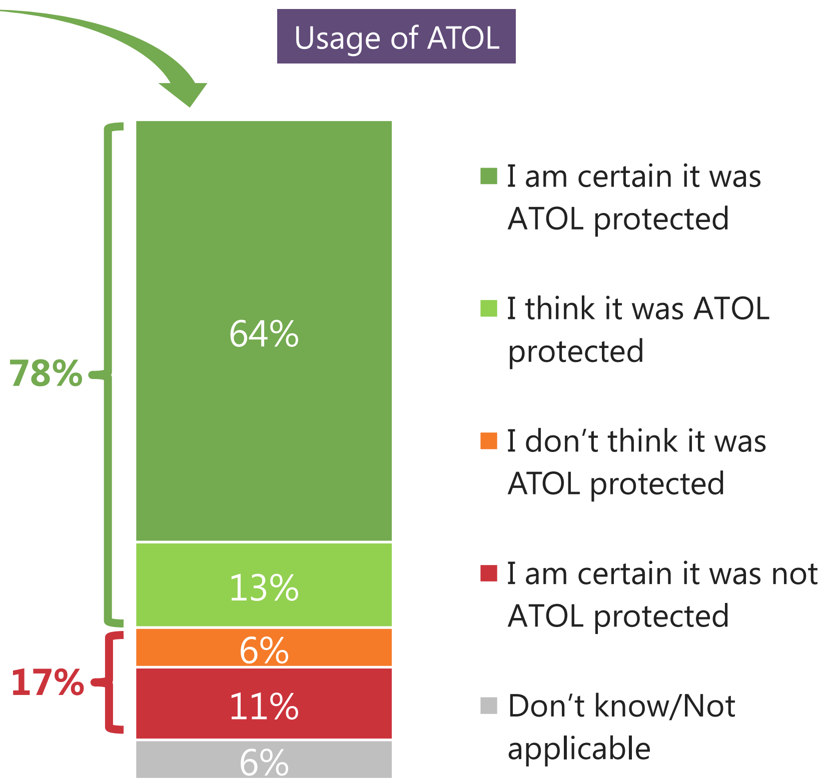
Importance of ATOL



Awareness of ATOL



Usage of ATOL



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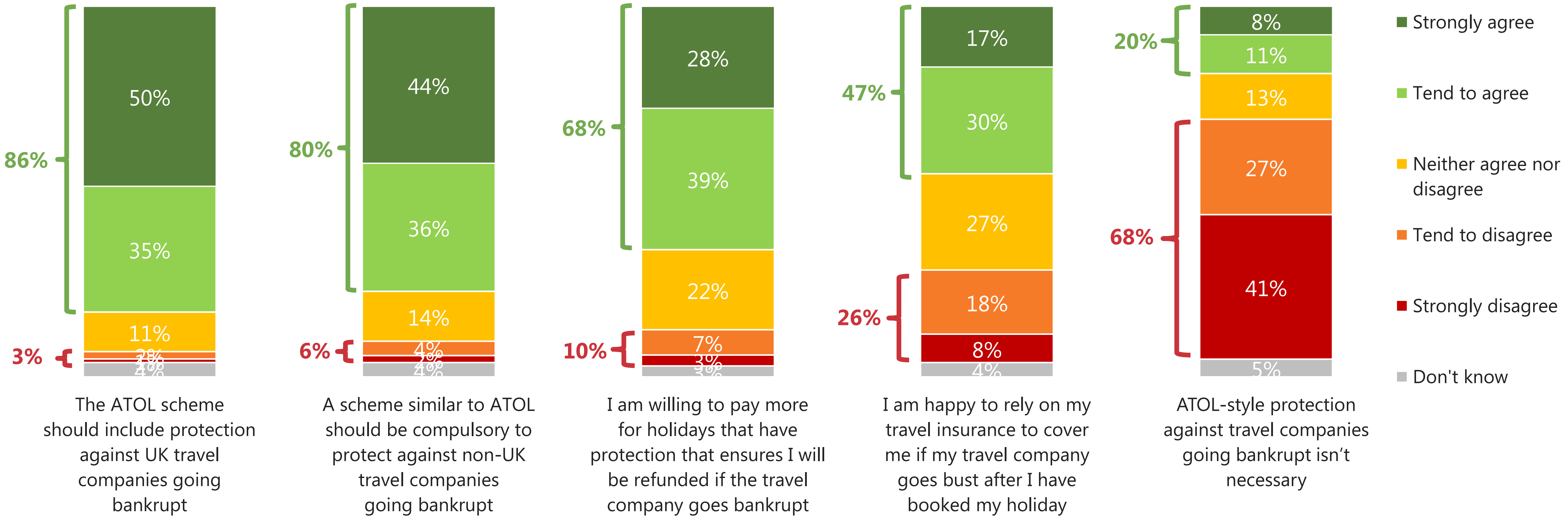
Q150 How important is it for you that your holiday is ATOL protected? Base: All participants who have flown in last 3 years (2539); Q151 Thinking back to when you booked your last holiday, which of the following statements best applies to you? Base: All participants who have flown in last 12 months for a holiday (1449); Q152 Was your last holiday ATOL protected? Base: All participants aware of ATOL protection (1312)

Civil Aviation Authority

ATOL protection features

Support is high for ATOL style schemes and two thirds are willing to pay more for this type of protection.



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Q153 To what extent do you agree or disagree with each of these statements about ATOL protection? Base: All participants who have flown in last 12 months (1965)

Appendix

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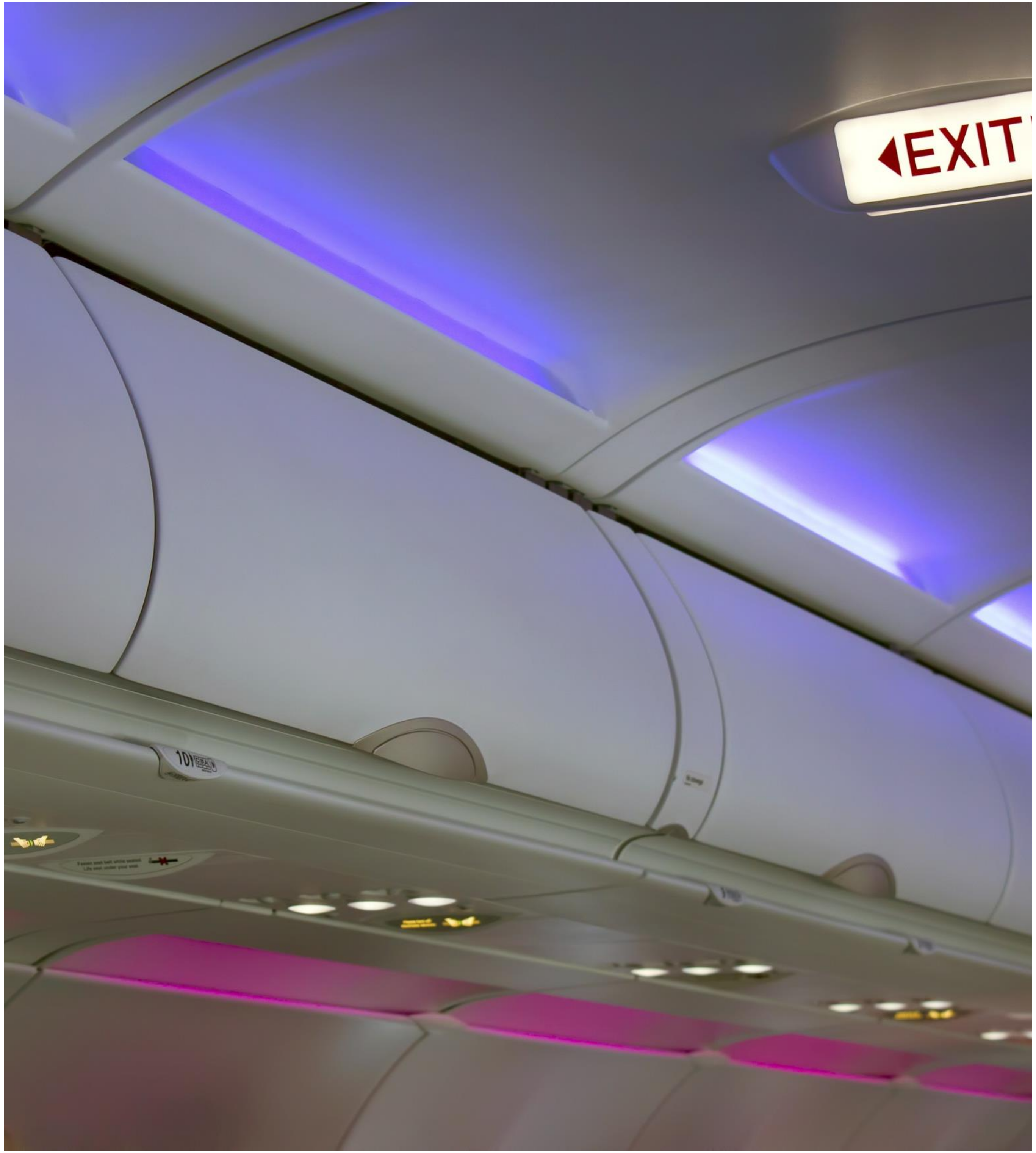

Ipsos MORI's standards and accreditations

Ipsos MORI's standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.

ISO 20252:2012

The international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos MORI was the first company in the world to gain this accreditation.

MRS Company Partnership

By being an MRS Company Partner, Ipsos MORI endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation.

ISO 9001:2008

International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.

ISO 27001:2005

International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos MORI was the first research company in the UK to be awarded this in August 2008.

Data Protection Act

Ipsos MORI is required to comply with the Data Protection Act; it covers the processing of personal data and the protection of privacy

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252:2012 and with the Ipsos MORI Terms and Conditions.

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