Civil Aviation Authority

Consumer Tracker for the Aviation Sector

Wave Four, Report: October 2017

Ipsos Loyalty

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Background to the research

This is the fourth 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 attitudes towards experiences of disruption when flying and the handling of any subsequent complaints

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Methodology

- In this third wave of research, we have continued to use the same methodology as in previous waves, in order to understand how behaviour and attitudes change over time.

- A total of 3,504 interviews were conducted with a nationally representative sample between 13th September and 6th October 2017. 3,002 interviews were conducted online and 502 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 in the 12 months before research took place (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 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 this wave (March 2017) data and previous waves, this is indicated. An upward arrow shows a significant increase and a downward arrow shows a significant decline. ▲ ▼ Solid arrows show changes between this wave and the third wave (March 2017). △ ▽ Hollow arrows indicate a year-on-year significant difference, between October 2016 and October 2017.

- Alternate arrows show a results that is significantly higher ⬆ or lower ⬇ than a specified subgroup.

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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%	10%
	25 – 34	17%	17%
	35 – 44	18%	18%
	45 – 54	18%	18%
	55 – 64	15%	16%
	65 +	21%	21%
Working status	Working Full Time	41%	43%
	Working Part Time	17%	15%
	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%	7%
	West Midlands	9%	9%
	London	13%	13%
	South East	14%	13%
	Eastern	9%	9%
	South West	8%	8%
	Wales	5%	5%
	Scotland	8%	9%
	Northern Ireland	3%	3%

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Demographic (weighted) sample profile

Gender

49% 51%

Age

18-24	25-34	35-44	45-54	55-64	65+
12%	17%	18%	18%	15%	21%

Ethnicity

93% White
3% Asian or Asian British
2% Black or Black British
1% Mixed
Chinese or other
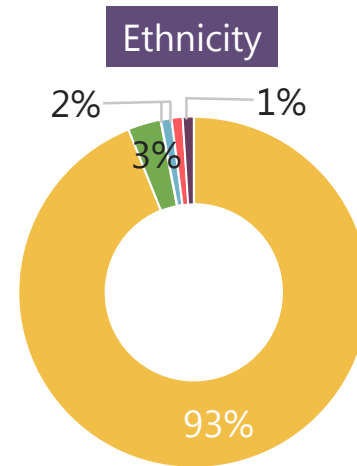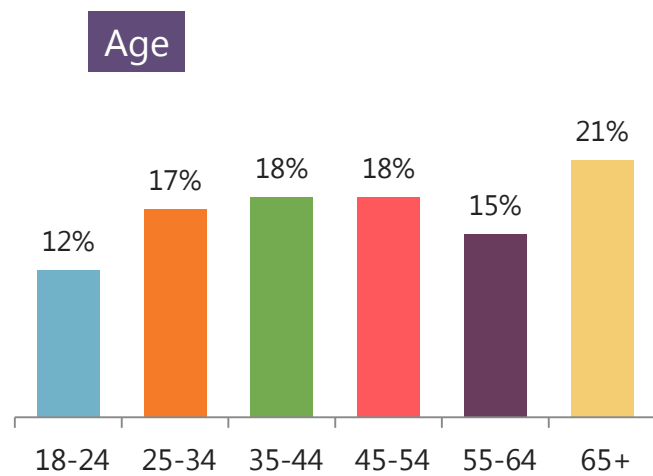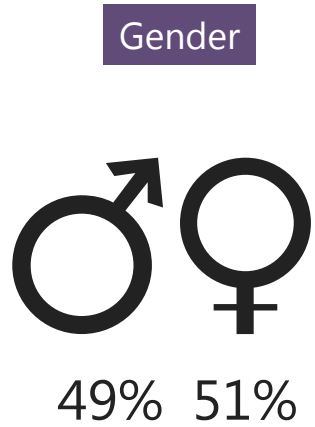
91% of those interviewed by phone have internet access

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	22%
Housewife/househusband	7%
Student/full time education	4%

Household Income

Up to £14,999	14%
£15,000-24,499	17%
£25,000-39,999	24%
£40,000-74,999	22%
£75,000 or more	8%

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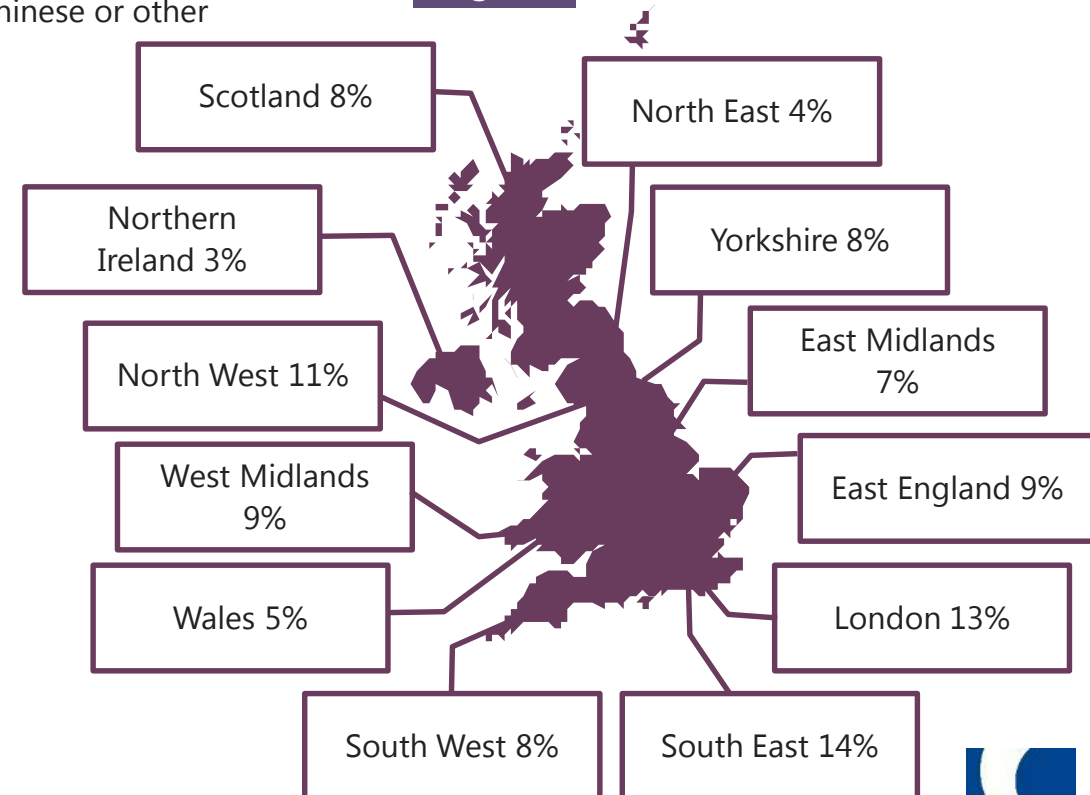
Scotland 8%
North East 4%
Northern Ireland 3%
Yorkshire 8%
North West 11%
East Midlands 7%
West Midlands 9%
East England 9%
Wales 5%
London 13%
South West 8%
South East 14%

Executive Summary

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Executive summary: Headlines

Overall patterns of air travel remain consistent with previous waves of this research. 53% have flown in the past year and 6% have never flown. Almost nine in ten (88%) flights are for holiday purposes. The biggest barrier to flying remains budgets and the cost of flying, as cited by 42% of those who did not fly in the past 12 months.

Enjoyment Whilst over half continue to enjoy travelling by air, this proportion has fallen slightly over the past two years. That said, nearly a quarter (23%) strongly agree, although a fifth (20%) disagree. PRM are less likely to enjoy flying than non-PRM (46% vs 55%), and PRM with non-physical disabilities are even less likely to agree (39%).

Security & Safety Confidence in the safety of UK airlines and airports continues to be the highest rated headline measure. Despite a small dip this wave, three-quarters (74%) are confident. Agreement that the balance between security screening and convenience is about right is the second highest rated headline measure. 62% agree it is about right, while 13% disagree. Disagreement tends to be because of a perceived over-emphasis on security screening at the expense of convenience (58% of those that disagree that the balance is right).

Consumer Confidence Confidence that consumers will get the service they have paid for when flying has dipped this wave (57% agree and 13% disagree). There has also been a drop in confidence of fair treatment in the event something goes wrong (44% agree and 21% disagree). Disagreement with these statements increase when consumers experienced disruption on their recent flight (21% and 28% disagree, respectively).

Consumer Choice Around half of UK consumers continue to agree that it is easy to understand and make price comparisons. Small increases in those disagreeing in March 2017 have continued into this wave of the research.

Environment Environmental concerns remain the lowest rated headline measures and are unchanged from previous waves. 22% think about the impact on the environment when flying but 48% disagree. 24% would pay more to reduce the environmental impact, with 41% disagreeing.

Satisfied ▮ Dissatisfied ▮

I enjoy travelling by air ▽ **53%** **20%**
(-3%pts)

Have confidence in the safety of UK airlines and airports ▼ **74%** **7%** ▲
(-3%pts) (+2%pts)

Balance btw security screening at UK airports and convenience is about right **62%** **13%**

Confident when travelling by air that I will get the service I have paid for ▼ **57%** **13%** ▲
(-4%pts) (+2%pts)

If things go wrong when travelling by air, I am confident that I will be treated fairly **44%** **21%** ▲
(+4%pts)

Easy to understand airline costs & make comparisons **49%** **23%**

Easy to find other important information & make comparisons **47%** **20%**

Would pay more for flight tickets to reduce the environmental/noise impact **24%** **41%**

When deciding whether to travel by air, I think about the impact on the environment **22%** **48%**

Executive summary: Travel experience

Experience of the most recent flight is generally very positive with 86% satisfied overall. Pre-flight planning, booking and travel to the airport is rated highly, along with information provision at the airport. There have, however, been some decreases in satisfaction with some airport touchpoints and with satisfaction with the airport experience overall.

Overall

- Overall satisfaction with the most recent travel experience is very high at 86% satisfied, though this represent a fall since Spring 2016, where 90% were satisfied.

- Satisfaction across touchpoints is broadly consistent with last wave, albeit with a few small but significant downward shifts in satisfaction.

Before flying

- Deciding which flight to book (86%) and the booking process itself (89%) continues to be very highly rated, although there remains some dissatisfaction with the choice of airlines and departure airports, particularly in some regions.

Airport Experience

- The airport experience overall is highly rated, with 78% satisfied, though this represents a year on year fall. The drop may be influenced by declines in airport experience touchpoints for baggage collection, passport/immigration control and shops, restaurants and services.

	Satisfied	Dissatisfied
Process of booking the flight	89%	3%
Finding way to gate	88%	3%
Ease of finding way around airport in UK	87%	3%
Deciding which flight to book	86%	3%
Travelling to/from airport in UK	85%	5%
Information about flight status at the UK airport	84%	6%
Security at the airport in the UK	84%	6%
Check-in and bag drop at airport in the UK	81%	7%
Ease of finding information to compare choices	79%	4%
Baggage collection at the airport in the UK	79%	9%
Passport/immigration control in the UK	79%	10%
Overall airport experience	78%	10%
Overall on-board and in-flight experience	76%	8%
Transfer/connection to another flight	75%	6%
Shop, restaurants & services at UK airport	75%	9%
Value for money	74%	9%
Amount of choice btw UK departure airports	67%	13%
Amount of choice between airlines	64%	13%
Handling of any complaints	53%	16%

Executive summary: Disruption & complaint handling

Disruption

- Close to half (45%) of recent flyers experienced what they perceive to be disruption on their last flight. The most common types of disruption experienced are long queues or crowding in the airport (19%), a flight delay of up to two hours and a delay taking off after boarding the aircraft (both 13%). Dissatisfaction with the way disruption is handled is high. Flyers that have experienced disruption are more likely to be negative about flying across a number of measures in the survey.

Complaint handling

- Satisfaction with complaint handling is also low, most notably for speed of response (44% dissatisfied), redress offered (44% dissatisfied) and being kept informed about the progress of complaints (46% dissatisfied).

- Negative perceptions of the time and effort it would take to complain prevent many potential complainants from either making a compliant or escalating an existing complaint to a third party.

Executive summary: PRM experience

Flying behaviour

- PRM are almost half as likely to have flown in the past year than non-PRM (30% compared to 59%) and twice as likely to have never flown (10% vs 5%).

Barriers

- The most commonly cited barrier to flying for PRM is budget/cost considerations (40%, similar to non-PRM at 43%). Over a third (36%) mention the difficulties that their health condition or disability would cause at airports or while flying.

Special assistance

- Half of PRM (51%) are at least generally aware about the special assistance available, and this increases to three-quarters (75%) of those that have flown in the past 12 months. When assistance is requested, satisfaction is high, with 83% satisfied.

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Headline measures

Headline Measures: Overall

Three quarters of UK consumers continue to be confident in the safety of UK airlines and airports, however there have been small but significant shifts lessening the strength of this opinion. There are also small decreases in fair treatment and getting what's been paid for.

■ Strongly agree   ■ Tend to agree   ■ Neither/nor
■ Tend to disagree   ■ Strongly disagree   ■ Don't know

Statement	Strongly agree	Tend to agree	Neither/nor	Tend to disagree	Strongly disagree	Don't know	% Agree	% Disagree
I have confidence in the safety of UK airlines and airports	27%	47%	16%	5%		3%	74% ▼ (-3%pts)	7% ▲ (+2%pts)
The balance between security screening at UK airports and convenience to passengers is about right	18%	43%	17%	9%	4%	8%	62%	13%
I am confident when travelling by air that I will get the service I have paid for	13%	44%	25%	10%	3%	5%	57% ▼ (-4%pts)	13% ▲ (+2%pts)
I enjoy travelling by air	23%	30%	23%	12%	8%	4%	53% ▽ (-3%pts)	20%
It is easy to understand how much it costs to travel with different airlines and to make comparisons	17%	33%	19%	17%	6%	9%	49%	23%
It is easy to find important information and to make comparisons	13%	34%	24%	15%	4%	9%	47%	20%
If things go wrong when travelling by air, I am confident that I will be treated fairly	10%	34%	28%	16%	5%	7%	44%	21% ▲ (+4%pts)
I would pay more for flight tickets to reduce the environmental / noise impact of flying	6%	18%	30%	26%	15%	5%	24%	41%
When deciding whether to travel by air, I think about the impact of flying on the environment	7%	16%	26%	30%	18%	4%	22%	48%

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Headline Measures: Trend

Three quarters of UK consumers are confident in the safety of UK airlines and airports.

Since March 2016 there has been a 6%pt decrease in the proportion confident that they will get the service they have paid for.

% Agree

Legend:
- Confidence in safety of UK airlines and airports
- Balance security screening and convenience about right
- Confident will get the service have paid for
- Enjoy travelling by air
- Easy to understand cost to travel
- Easy to find important information*
- When things go wrong, confident will be treated fairly
- Would pay more to reduce environmental impact
- Think about impact of flying on environment

Data points (Mar '16, Oct '16, Mar '17, Oct '17):
- Confidence in safety: 76%, 76%, 77%, 74% ▼
- Balance security screening: 63%, 63%, 63%, 62%
- Confident will get service paid for: 62%, 61%, 61%, 57% ▼
- Enjoy travelling by air: 57%, 56%, 55%, 53% ▽
- Easy to understand cost: 50%, 51%, 50%, 49%
- Easy to find important information: 49%, 48%, 47%
- When things go wrong: 46%, 47%, 46%, 44%
- Would pay more to reduce environmental impact: 24%
- Think about impact of flying: 21%, 22%, 22%, 22%

Mar '16   Oct '16   Mar '17   Oct '17

Although the proportion of UK consumers who enjoy travelling by air has fallen slightly, more than half continue to enjoy travelling by air.

Agree: 56% 55% 53% ▽
Disagree: 18% 20% 20%

	Oct '16	Mar '17	Oct '17	
Strongly agree	24%	25%	23%	
Tend to agree	32%	30%	30%	
Neither agree nor disagree	21%	21%	23%	
Tend to disagree	11%	12%	12%	
Strongly disagree	8%	8%	8%	
Don't know	5%	4%	4%	

I enjoy travelling by air

- The more recently someone has flown, the more likely they are to say that they enjoy flying (64% of those that flew in the last 3 months agree that they enjoy flying, compared to 57% of those who last flew in the past 1-3 years, 48% of those who last flew 4-10 years ago, and 37% of those who last flew 10+ years ago). Those who flew 4-10 years ago and 10+ years ago are more likely than average to disagree (24% and 28%, respectively). 67% of those who have flown 4 or more times in the past year enjoy flying.

- Those who last flew Premium Economy are also more likely to enjoy flying (71%).

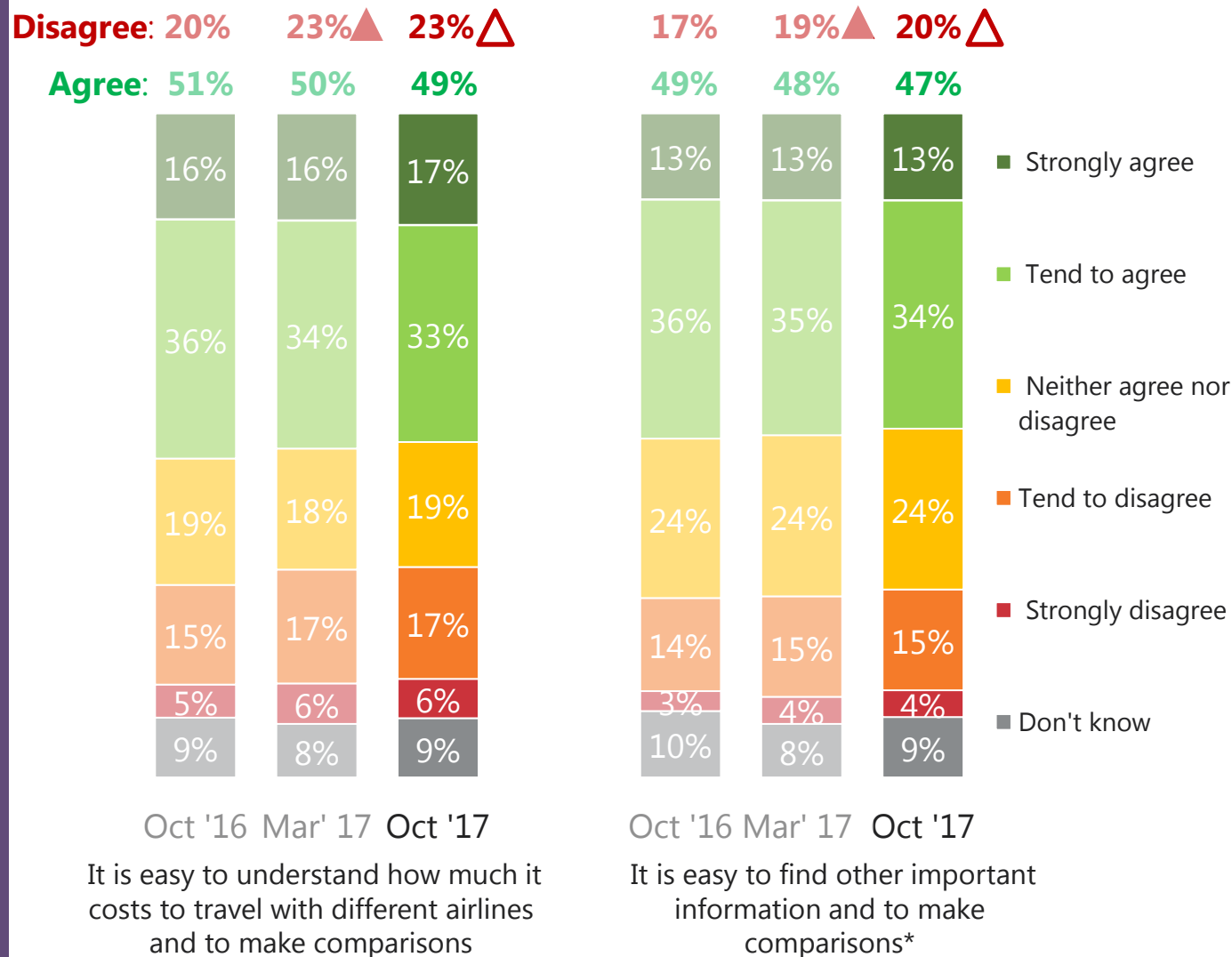- PRM are less likely than non-PRM enjoy flying (46% of PRM agree compared to 55% of non-PRM) and more likely to disagree (24% vs 19%). This is a particular issue for PRM with non-physical disabilities, 39% of whom agree that they enjoy flying and 27% disagree. PRM who do not need assistance when flying are the PRM subgroup most likely to disagree that they enjoy flying (29%, with 41% agreeing), suggesting improvements in helping PRM outside of formal assistance may be needed.

- Recent flyers who used assistance and had requested it on a previous flight are more likely to enjoy flying (75%) than recent flyers who did not need assistance (62%).

- Those who experienced disruption on their most recent flight are more likely to disagree that they enjoy flying (22%) than those who did not (15%), but there are no major differences in the likelihood of agreeing that they enjoy flying (60% and 63%, respectively).

- Men are more likely to enjoy flying than women (56% vs 50% agree and 17% vs 23% disagree). 57% of those aged 18-34 enjoy flying compared to an average of 52% for those aged 35 and above. Those on higher incomes also enjoy flying more (60% of those earning £75,000+ per year and 56% of those earning £40,000-£74,999, compared to 48% of those earning less than £15,000 per year.

Flying behaviour

Cabin class

PRM

Assistance

Disruption

Demographics

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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 (3504)
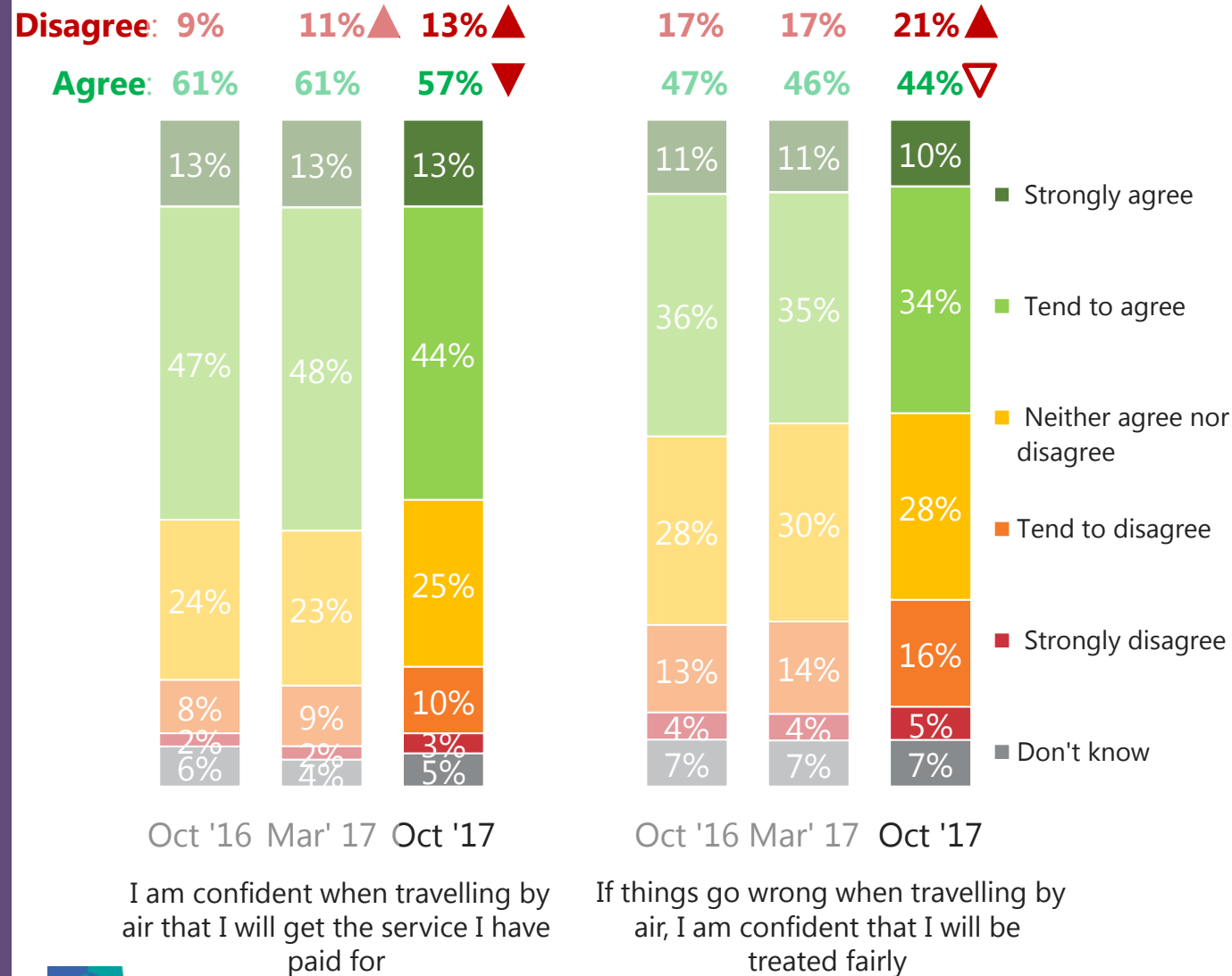
Headline Measures: Consumer Choice

Half of UK consumers find it easy to understand and compare costs of travelling with different airlines, and a similar proportion cite finding other important flight information easy. The proportion disagreeing stands at almost a quarter and almost a fifth, respectively.

Disagree: 20%   23% ▲   23% △   17%   19% ▲   20% △
Agree: 51%   50%   49%   49%   48%   47%

Chart 1 — It is easy to understand how much it costs to travel with different airlines and to make comparisons

	Oct '16	Mar' 17	Oct '17
Strongly agree	16%	16%	17%
Tend to agree	36%	34%	33%
Neither agree nor disagree	19%	18%	19%
Tend to disagree	15%	17%	17%
Strongly disagree	5%	6%	6%
Don't know	9%	8%	9%

Chart 2 — It is easy to find other important information and to make comparisons*

	Oct '16	Mar' 17	Oct '17
Strongly agree	13%	13%	13%
Tend to agree	36%	35%	34%
Neither agree nor disagree	24%	24%	24%
Tend to disagree	14%	15%	15%
Strongly disagree	3%	4%	4%
Don't know	10%	8%	9%

- The more recently UK consumers have flown, the more likely they are say it is easy to make cost and other comparisons when booking flights, with 62% of those who have flown in the last 3 months agreeing it is easy to compare costs, whereas only 26% of those who last flew 10 or more years ago agree. Those who have flown 4 or more times in the past year are even more likely to agree it is easy to understand cost (68%) and other (64%) comparisons. Those flying for business purposes are also more likely to agree than those flying for non-business purposes (67% vs 60% for cost comparisons and 66% vs 58% for other comparisons).

- Recent flyers who last booked online are also more likely than average to agree with these statements (62% that it is easy to compare prices between airlines and 60% for other important information).

- PRM are less likely than non-PRM to feel it is easy to make cost comparisons when booking flights (43% vs 51%) and this falls further for PRM with non-physical disabilities and needing assistance (32%), those with hidden disabilities who need assistance (34%) and those who haven't taken a flight in the last 12 months (36%). A similar picture is also true for perceptions of ease of making other flight comparisons (39% of non-PRM compared to 49% of PRM, 25% of PRM with non-physical disabilities who need assistance and 28% of PRM with hidden disabilities who need assistance).

- Younger UK consumers are more likely to say it is easy to compare costs and other information than older generations. Those with higher household incomes are also more likely to agree with both statements than those with lower household incomes.

Flying behaviour

Booking method

PRM

Demogs

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 (3504).

Headline Measures: Consumer Confidence

Confidence in getting the service that has been paid for has decreased since Spring 2017, although 57% remain confident. While 44% are confident they will be treated fairly, over a fifth are not (21%), a significant increase from March 2017.

Disagree: 9% 11%▲ 13%▲   17% 17% 21%▲

Agree: 61% 61% 57%▼   47% 46% 44%▽

Chart 1 — I am confident when travelling by air that I will get the service I have paid for

	Oct '16	Mar' 17	Oct '17
Strongly agree	13%	13%	13%
Tend to agree	47%	48%	44%
Neither agree nor disagree	24%	23%	25%
Tend to disagree	8%	9%	10%
Strongly disagree	2%	2%	3%
Don't know	6%	4%	5%

Chart 2 — If things go wrong when travelling by air, I am confident that I will be treated fairly

	Oct '16	Mar' 17	Oct '17
Strongly agree	11%	11%	10%
Tend to agree	36%	35%	34%
Neither agree nor disagree	28%	30%	28%
Tend to disagree	13%	14%	16%
Strongly disagree	4%	4%	5%
Don't know	7%	7%	7%

Legend:
- ■ Strongly agree
- ■ Tend to agree
- ■ Neither agree nor disagree
- ■ Tend to disagree
- ■ Strongly disagree
- ■ Don't know

- Those with flying experience in the last three years are more likely than average to agree both that they will get the service they paid for when travelling by air (63%) and that they will be treated fairly (47%) if things go wrong. Although the level of agreement among those who have flown four or more times in the past 12 months is similar, this group has a more polarised view, with greater disagreement (16% and 26% respectively).

  (Flying behaviour)

- Disruption on the last flight has an impact on opinion and leads to higher disagreement levels. 21% of those who experienced disruption disagree that they will get what they paid for, and 28% do not believe that they will be treated fairly.

  (Disruption)

- When the last flight was for leisure purposes, recent flyers are more likely than average to agree that they will get what they've paid for (66%) or that they will be treated fairly (49%).

  (Flight purpose)

- PRM (50%) are less likely to agree that they will get what they paid for than non-PRM (59%), and this further decreases among PRM with physical conditions (47%) and those needing assistance (42%). PRM are less likely than non-PRM to feel they would be treated fairly if things go wrong (41% vs 45%), decreasing to 34% among PRM with hidden disabilities requiring assistance.

  (PRM)

- Recent flyers who booked face to face are more likely to be confident they will get the service they paid for (76%) than those booking online (65%) or by telephone (64%).

  (Booking channel)

Headline Measures: Security and Safety

Confidence in the safety of UK airlines and airports is the highest rated headline measure, although there has been a drop in agreement and an increase in disagreement, both significant.

Disagree: 5%   5%   **7% ▲**   11%   13% ▲   13% △

Agree: 76%   77%   **74% ▼**   63%   63%   62%

Legend:
- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

I have confidence in the safety of UK airlines and airports
- Oct '16: 29% / 47% / 15% / 4% / 1% / 4%
- Mar' 17: 30% / 48% / 15% / 4% / 1% / 1%
- Oct '17: 27% / 47% / 16% / 5% / 2% / 3%

The balance between security screening at UK airports and convenience to passengers is about right
- Oct '16: 19% / 44% / 17% / 9% / 3% / 9%
- Mar' 17: 19% / 44% / 18% / 10% / 3% / 6%
- Oct '17: 18% / 43% / 17% / 9% / 4% / 8%

- Recent flyers who have flown in the last 12 months are more likely than average to have confidence in UK airport and airline safety and security (82%) and more frequent flyers are particular confident, with 86% of those who have flown 4+ times in the past year agreeing. Only 34% of those who have never flown agree. When considering the balance between security and convenience, recent fliers are more likely to agree that it's about right (71%).

- 83% of those who travelled in Economy or Premium Economy cabin agree they have confidence in UK airport and airline safety and security, higher than UK consumers overall. Those who travelled in Premium Economy (78%) are more likely to say the security screening and convenience balance is about right than those travelling in other classes.

- Those who experienced disruption on their last flight (17%) are more likely than those who didn't (11%) to disagree that the security screening balance is right.

- PRM have less confidence in the safety and security of UK airlines and airports than non-PRM (66% vs 76%) and are also less likely to say the balance between security and convenience is about right (53% vs 65%). PRM with non-physical disabilities are less likely than PRM to agree with both statements (57% and 47%, respectively).

- 78% of those age 18-24 and 65+ have confidence in the safety and security of UK airports and airlines, higher than the 70% of those age 35-54 who say the same. High earners are most likely to have confidence in safety and security (80% of those earning between £40,000 and £74,999 and 82% over £75,000).

- Women are more likely than men to agree that the balance between convenience and security is about right (64% vs 60%). 18-24 year olds are also more likely to agree on average (69%), as are high earners (68% of those earning £40,000-£75,000 and 69% of those earning £75,000+).

Flying behaviour

Cabin class

Disruption

PRM

Demographics

Imbalance between security screening and convenience

Among those who believe that the balance between security and convenience is not right, there is a tendency to believe that there is Too much focus on security rather than convenience.

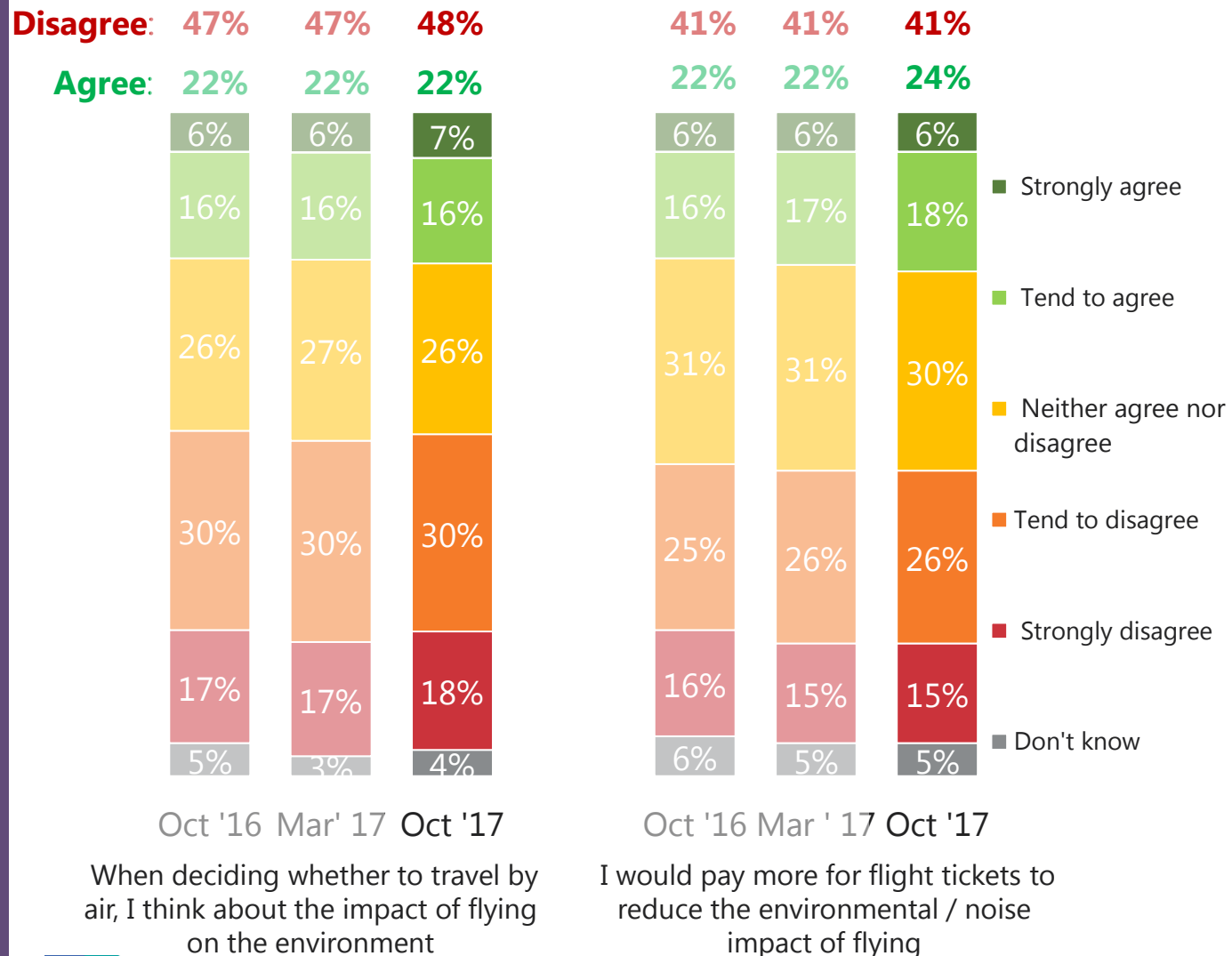**13%** Think the balance between security and convenience is not right.
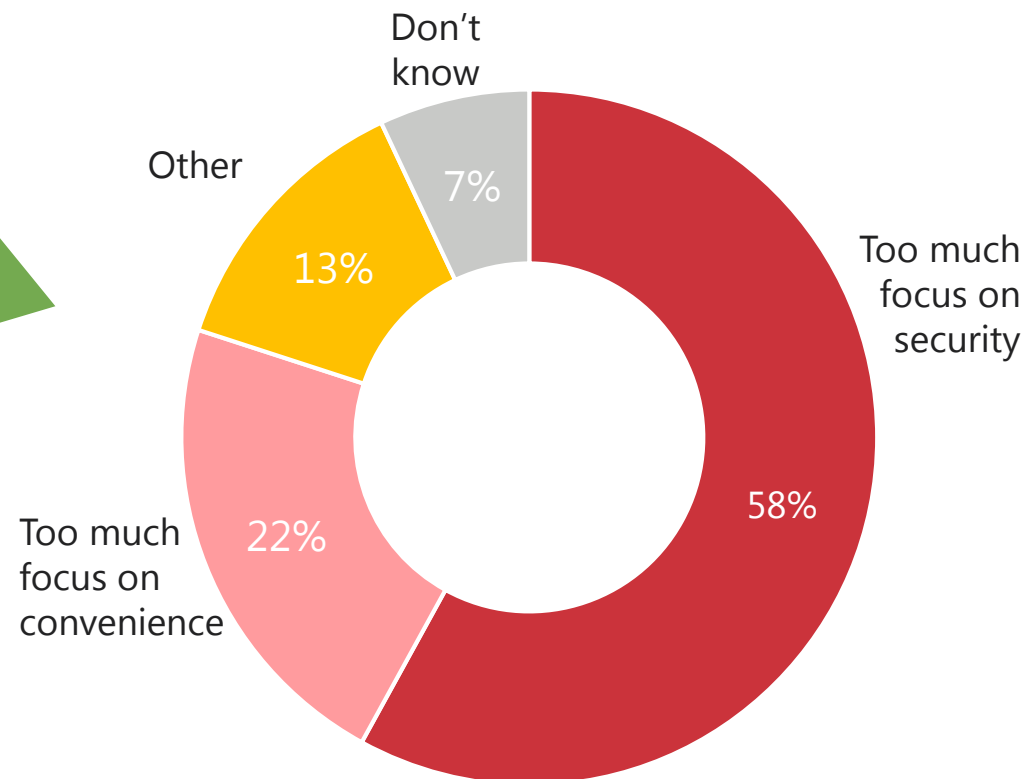
Of those who felt the balance between security and convenience requires improvement…

- More frequent flyers are more likely to believe that the balance is tilted too much towards security. 70% of those who have flown four or more times in the last year believe that there is too much focus on security.

- Male travellers are more likely to state that there is too much focus on security, with 65% of men stating that the balance focuses too much on security. Female travellers are the opposite, with 29% stating that there is too much focus on convenience.

- Travellers aged 18-24 who believe that the balance is not right are more likely than others to believe that there is too much focus on convenience, with 39% of this age group stating that they believe this is prioritised.

Don't know

Other

Too much focus on security

7%

13%

58%

Too much focus on convenience

22%

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 (471)

Headline Measures: Environment

The lowest rated headline measure, just over a fifth agree they think about the environmental impact when travelling by air, while almost half do not. Just a quarter would pay more for flight tickets to reduce the environmental impact.

Disagree: 47%   47%   **48%**   41%   41%   **41%**

Agree: 22%   22%   **22%**   22%   22%   **24%**

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

	Oct '16	Mar '17	Oct '17
Strongly agree	6%	6%	7%
Tend to agree	16%	16%	16%
Neither agree nor disagree	26%	27%	26%
Tend to disagree	30%	30%	30%
Strongly disagree	17%	17%	18%
Don't know	5%	3%	4%

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

	Oct '16	Mar '17	Oct '17
Strongly agree	6%	6%	6%
Tend to agree	16%	17%	18%
Neither agree nor disagree	31%	31%	30%
Tend to disagree	25%	26%	26%
Strongly disagree	16%	15%	15%
Don't know	6%	5%	5%

Legend:
- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know

Age
- Young people age 18-34 are more likely than those age 35 and over to say they would pay more for flight tickets to reduce the environmental impact of flying (29% agree, compared to 22% among those over 35). However, even among this group, a higher proportion disagree than agree (39%).

Flying behaviour
- Those who have flown 4 or more times in the past 12 months (58%) are more likely than UK consumers overall to disagree that they think about the environmental impact when flying, though they are no more or less likely to agree. There is greater agreement and disagreement among those who have flown in the past 12 months compared UK consumers on average that they would pay more to reduce the environmental impact of flying (26% and 44%, respectively).

Purpose
- Those travelling for business purposes in the last 12 months are more likely to agree they think about the environmental impact when flying (27% vs 22% among those who have travelled for non-business purposes), although almost half (46%) of this group disagree. This group is also more likely than those who have travelled for non-business purposes in the last 12 months to say they would pay more to reduce the environmental impact of flying (34% vs 26%).

Cabin
- Those who travelled in Premium Economy on their last flight are more likely than average to say they think about the environmental impact of flying (30%), and that they would pay more to reduce this impact (34%).

PRM
- Non-PRM are more likely to disagree (42%) than PRM (36%) that they would pay more to reduce the environmental impact of flying, though there is no difference in the level of agreement.
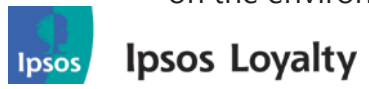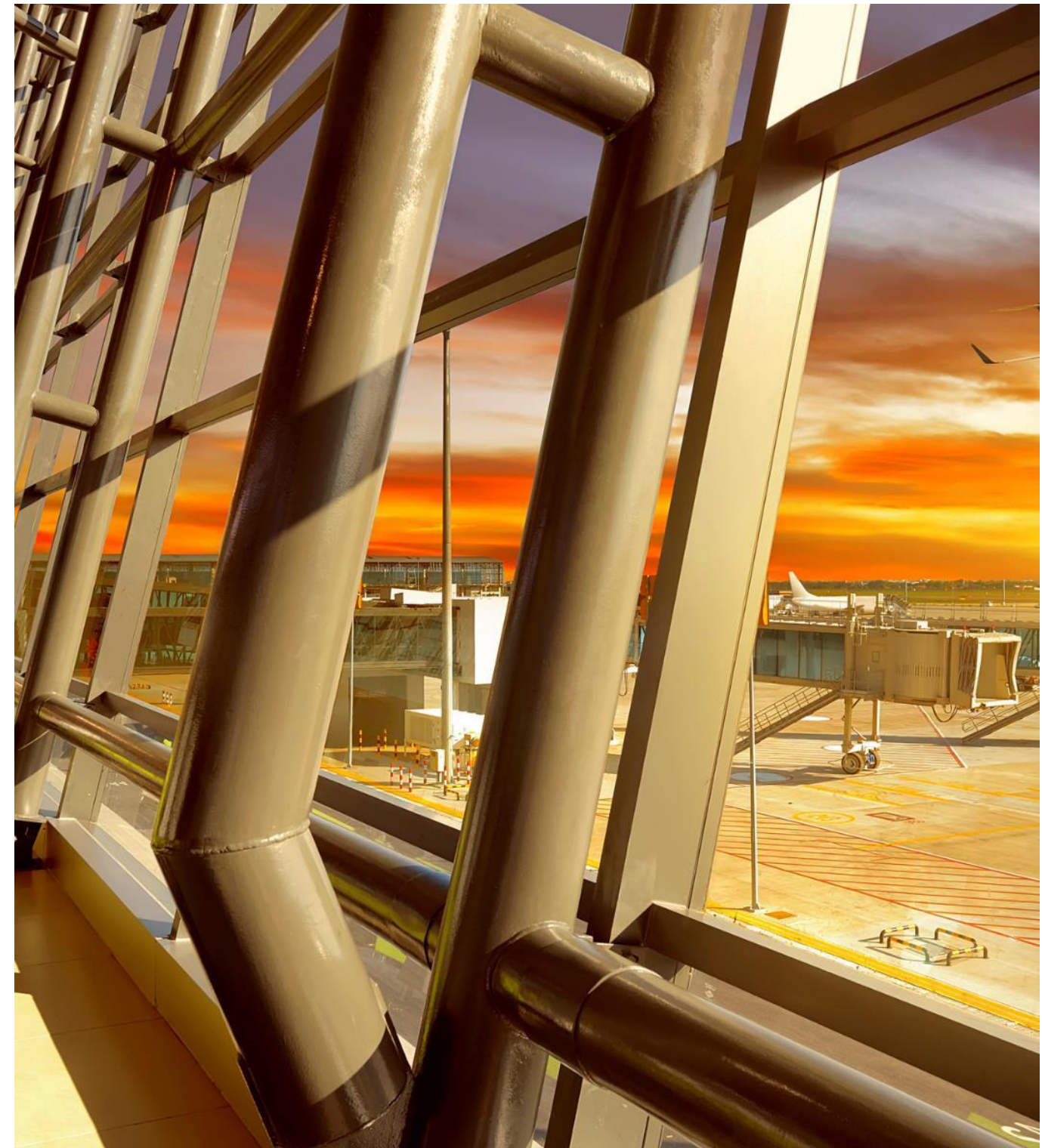
Flying behaviour

Ipsos Loyalty
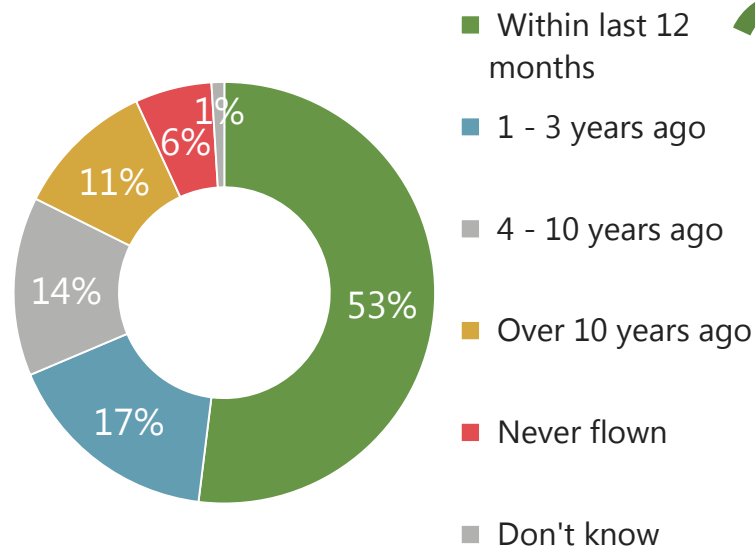
Flying behaviour - Summary

Most people in the UK have flown in the past, and over half and flown in the past 12 months. Most experience of flying is when travelling on holiday. continues to be the biggest barrier to flying.

- **The majority of the UK population have experience of flying, and around half (53%) are recent flyers, having flown in the last 12 months.**

  - Just over one third (35%) of recent flyers have only taken a flight once in the last year. A similar proportion (33%) have flown two or three times in the same time period.

  - A small cluster of recent flyers (22%) travel by air four or more times a year. This equates to about one in ten of the overall population who fly particularly frequently.

  - Most recent flyers believe that their flying habits will be stable over the next twelve months, with the three in five (60%) stating that they'll fly the same amount. There are small minorities who believe the number of flights they will take will increase (19%) and decrease (13%).

  - The majority of recent flyers have flown to go on holiday in the last twelve months, with nine out of ten (88%) having taken flights as part of their holiday. The second largest reason for flying is visiting friends or relatives (29%), whilst 12% fly for business or reasons relating to work.

- **Budgetary concerns remain the largest barrier to flying.**

  - Among those who have not flown in the last year, budget constraints are the leading factor. In line with previous waves, two in five (42%) non-recent flyers cite this as a reason they have not flown in the last year. Three in ten (29%) have not made any trips where flying would be an option.

  - There are small but significant changes in the proportion of non-recent flyers who mention pregnancy, children or age, and not having time to travel within the UK or abroad. Mentions of pregnancy, children and age increase, with 7% of non-recent flyers mentioning these specifically as barriers. Not having time is mentioned by 6%, a small decrease.

  - Health and disability issues are mentioned by more than one in ten (12%) non-recent flyers,

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Flying behaviour: A general overview

Flying behaviour has been consistent over time, with just over half of UK consumers flying in the last year. A fifth of these have flown four or more times in that period. Holiday continues to be the most common flight purpose.

Last flight from a UK airport

- Within last 12 months — 53%
- 1 - 3 years ago — 17%
- 4 - 10 years ago — 14%
- Over 10 years ago — 11%
- Never flown — 6%
- Don't know — 1%

Number of flights in the last 12 months

- One — 35%
- Two — 29%
- Three — 14%
- Four or more — 22%

Anticipated changes in the next 12 months
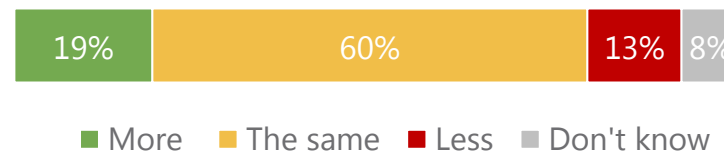
| 19% | 60% | 13% | 8% |

More   The same   Less   Don't know

Purpose of flights in the last 12 months

- Holiday — 88%
- Visiting friends or relatives — 29%
- Business/work reasons — 12%
- Education/study reasons — 4%
- Other — 2%

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Civil Aviation Authority

Flight and accommodation booking

Roughly equal proportions booked flights and accommodation together, booked separately, and only booked flights. For those booking flights and accommodation together, there has been an increase in the proportion booking through a UK based company.

I booked flights and accommodation together from the same company as part of a package — 34%

I booked flights and accommodation from separate companies — 32%

I only booked flights, I did not need to book accommodation — 31%

Other — 1%

Don't know/can't remember — 1% ▼

10%

2%

89% ▲ *(+5%pts)*
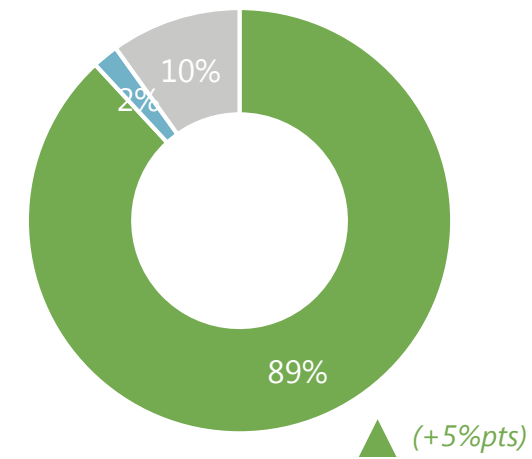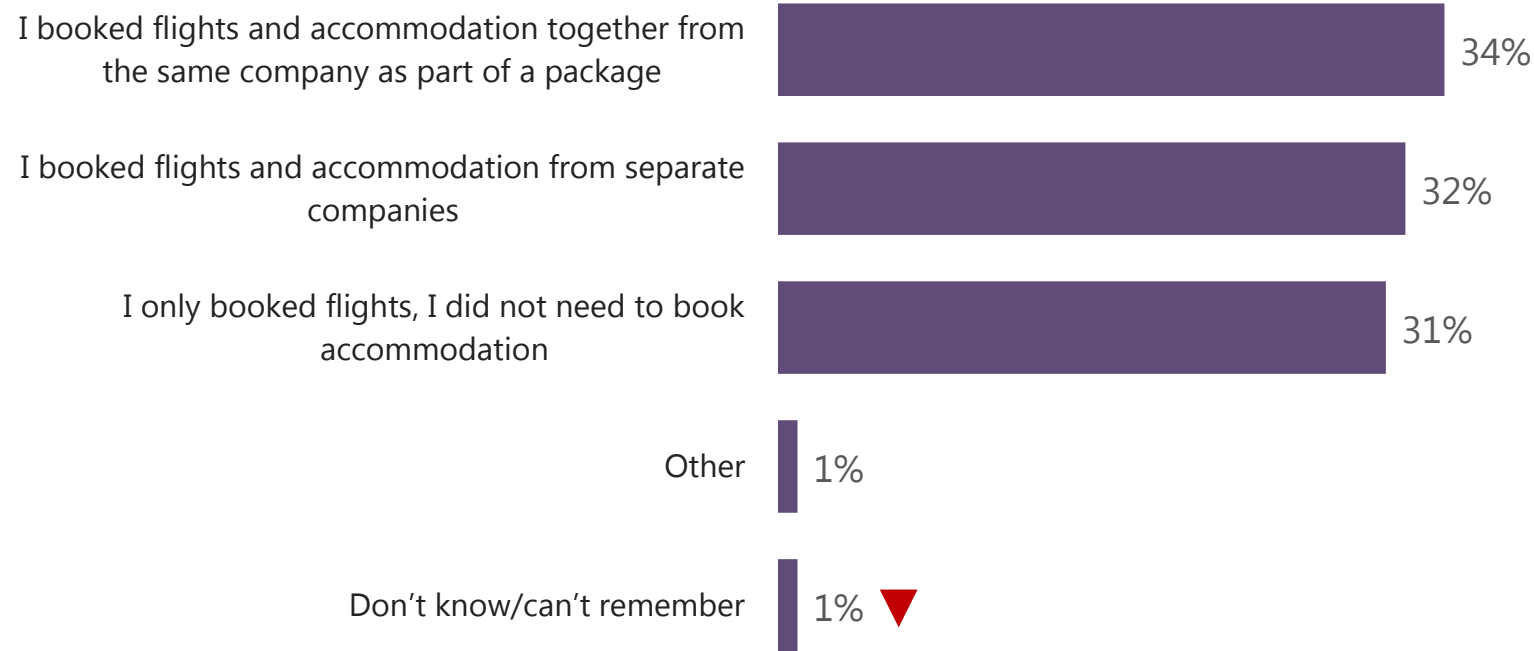
■ I booked through a UK based company

■ I booked through a company based outside of the UK

■ I don't know

Flying behaviour: Barriers

Budget constraints/cost of travel remains the biggest barrier to flying. There has been an increase in perceived difficulties flying due to situations such as pregnancy or flying with children or the elderly.

Barriers to flying in the past 12 months
(mentions above 2%)

Barrier		March 2017	October 2016	March 2016
Budget constraints/the cost of travel	42%	41%	42%	42%
Not made any trips where flying would be an option	29%	28%	30%	28%
Health or disability reasons make it difficult to manage on the flight	10%	8%	9%	8%
Fear of flying	9%	9%	10%	11%
Prefer another mode of transport (e.g. car, boat or train)	9%	9%	10%	11%
Health or disability reasons make it difficult to manage at the airport	9%	7%	8%	8%
Dislike airports/the flight experience	8%	8%	9%	N/A
Flying is difficult due to pregnancy, children, elderly travel companions etc.	7% ▲	5%	6%	5%
Don't have the time to travel within the UK or abroad	6% ▼	8%	7%	9%
Getting to the airport is difficult	4%	3%	4%	4%
Concerns about the environment/carbon footprint	3%	3%	3%	3%
Bad previous experience has put me off	3%	2%	3%	3%

12% mention health/disability, consistent with previous waves.

Flying behaviour: Barriers

Those who have not flown in the past 12 months because of budget constraints are significantly more likely to disagree that it is easy to understand costs or find and compare information about flights than those who have not flown for other reasons.

When searching for a flight...

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

It is easy to find important information and make comparisons
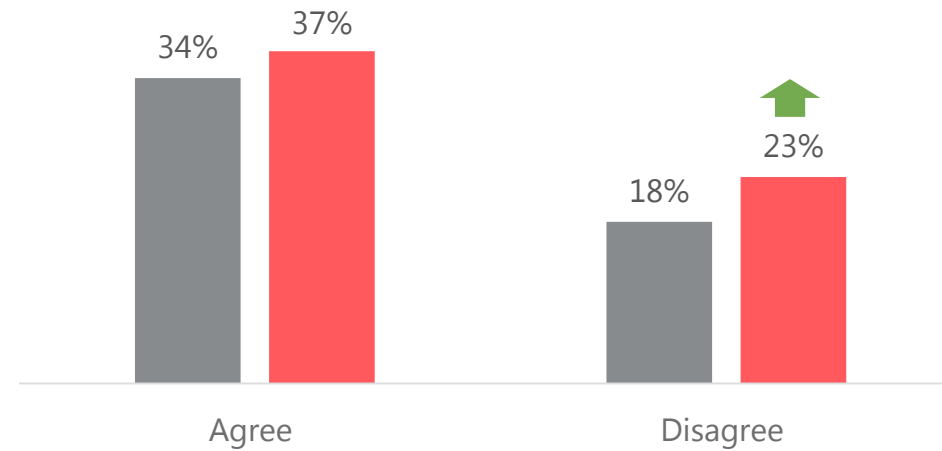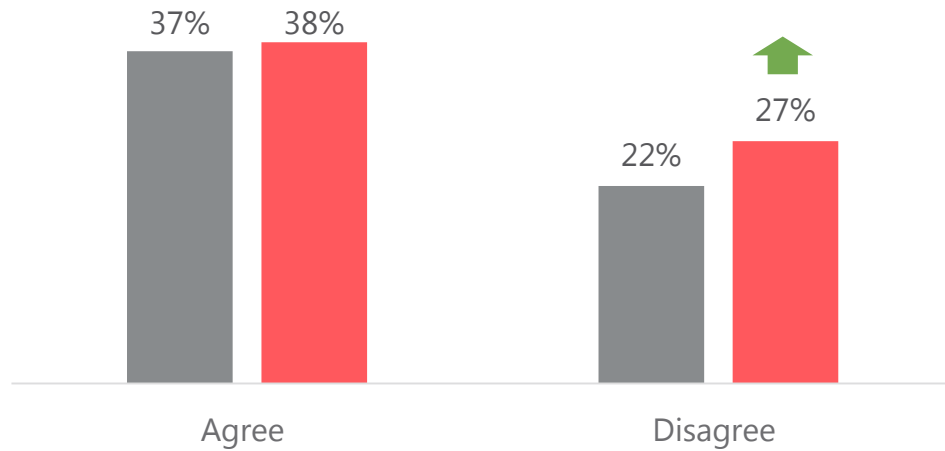
Agree: 37% / 38%
Disagree: 22% / 27%

Agree: 34% / 37%
Disagree: 18% / 23%

- ■ Not flown in the past 12 months - reasons other than budget
- ■ Not flown in the past 12 months due to budget constraints

- ■ Not flown in the past 12 months - reasons other than budget
- ■ Not flown in the past 12 months due to budget constraints

= significant difference v those who have not flown in the last 12 months

Flying behaviour: Barriers

As household income increases amongst respondents, so does likelihood to agree that it is easy to understand costs or find and compare information about flights.

When searching for a flight...

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

	Up to £14,999	£15,000 - £24,499	£25,000 - £39,999	£40,000 - £74,999	£75,000 +
Agree	43%	44%	50%	54%	60%
Disagree	19%	21%	23%	26%	25%

■ Agree ■ Disagree

It is easy to find important information and make comparisons

	Up to £14,999	£15,000 - £24,499	£25,000 - £39,999	£40,000 - £74,999	£75,000 +
Agree	40%	43%	48%	52%	60%
Disagree	16%	17%	22%	22%	19%

■ Agree ■ Disagree

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Recent flying experience

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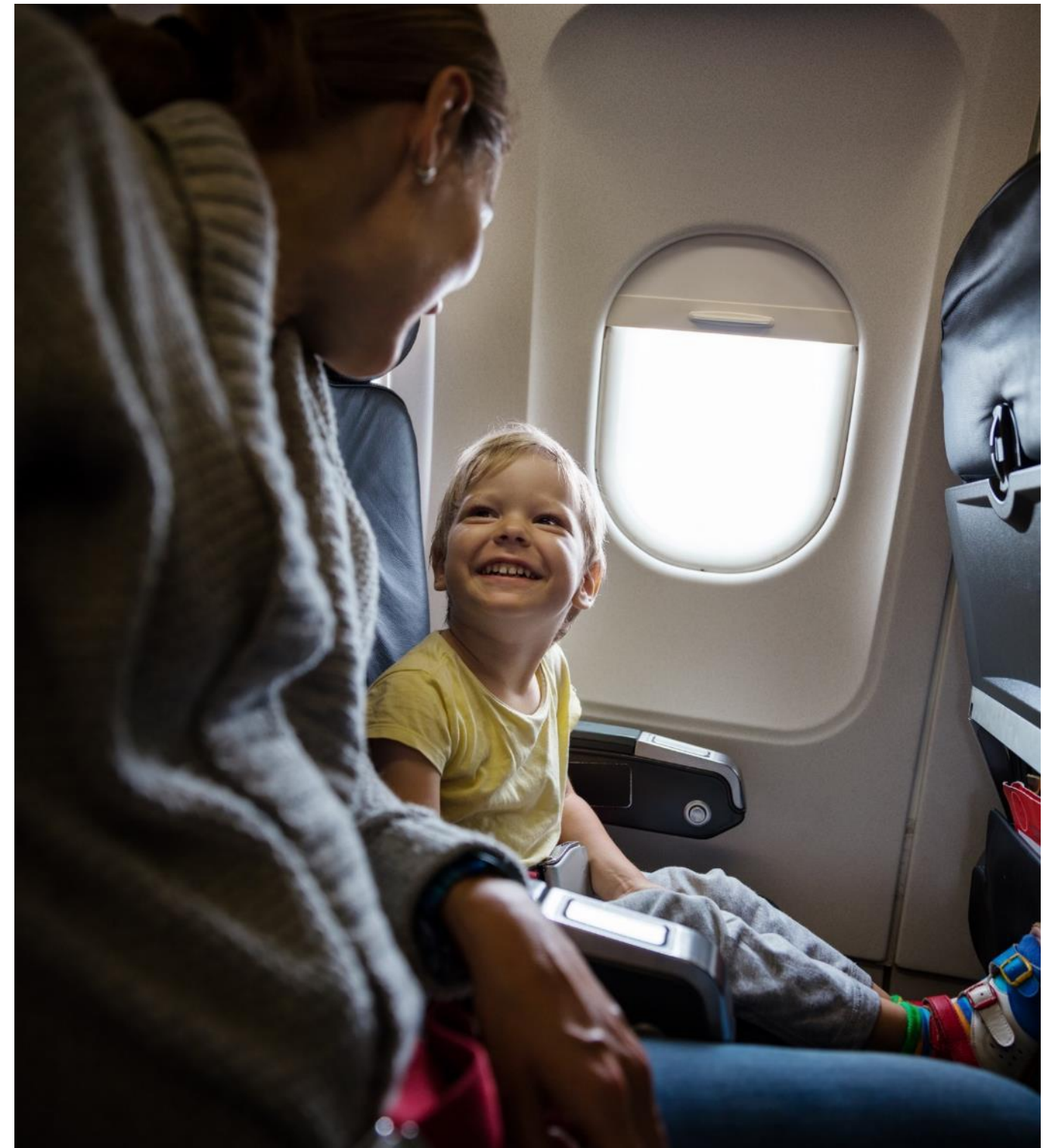
Recent flying experience - summary

Recent flyers generally have a very positive experience of flying from the UK, with satisfaction ratings high across multiple touchpoints. A small number of airports and airlines are most frequently used by consumers, who tend to fly to go on holiday.

- **A relatively small number of airports and airlines dominate consumers' recent experience of flying, which are also influenced by the summer holiday period.**

  - Seasonal variation in flying patterns continue, with many consumers flying over the summer holiday period. Most recent flights (75%) are for holidays, and the majority (84%) fly in Economy Cabin Class. Half of recent flights are international short haul, a slight increase compared to March 2017.

  - Gatwick, Heathrow and Manchester remain the most frequently used airports, with 17%, 16% and 16% of recent flyers using these airports on their last flight. EasyJet, British Airways and Ryanair are the most frequently used airlines (with 20%, 14% and 14% of recent flights each).

- **Satisfaction with the flight experience is generally high, both at the overall level and across multiple touchpoints.**

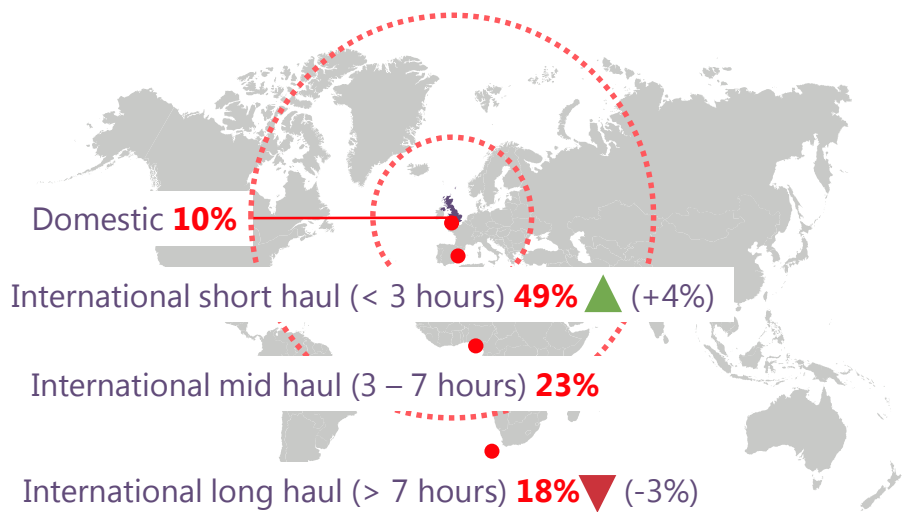 - With 86% satisfied (and one in three very satisfied) with their most recent flying experience overall, the experience of flying is positive for recent flyers. However, there has been a fall in this metric over the last two years.

  - Respondents were generally satisfied with the planning stages of booking a flight. However, there is still scope for improvement regarding the ease with which consumers are able to compare flights on price and other factors.

  - Getting to and from the airport is seen as essential or important by nine in ten (87%) of recent flyers, and the information to compare different options is seen as easy to find. Consumers' experience of this aspect rise slightly in October 2017, with 85% satisfied, although this rise is not statistically significant.

  - Ratings of the airport experience fall significantly compared to October 2016, but four in five (78%) remain satisfied. Some specific aspects of the airport experience also fall, with ratings of passport/immigration control in the UK and shops, restaurants and services provided at the airport in the UK both falling compared to October 2016. Satisfaction with baggage collection at the UK airport has fallen significantly since March 2017.

Last flight: Journey details (1)

International short haul flights remain the most common among recent flyers, who tend to use a small number of airports and airlines.

Was the flight domestic or international?

Domestic **10%**

International short haul (< 3 hours) **49%** ▲ (+4%)

International mid haul (3 – 7 hours) **23%**

International long haul (> 7 hours) **18%** ▼ (-3%)

Departure airport

Airport	%
Gatwick	17%
Heathrow	16%
Manchester	16%
Birmingham	7%
Stansted	7%
Glasgow International	5%
Bristol	4%
Luton	3%
East Midlands International	3%
Edinburgh	3%
Leeds Bradford	3%
Newcastle	3%
Belfast International	2%
Liverpool John Lennon	2%
Cardiff	2%
Aberdeen	1%
Belfast City	1%
London City	1%
Southampton	1%
Other	3%

Airlines used

Airline	%
Easyjet	20%
British Airways	14%
Ryanair	14%
Thomson	10%
Jet2	8%
Thomas Cook	5%
Monarch	5%
Flybe	4%
Virgin Atlantic	3%
Emirates	3%
KLM	1%
Aer Lingus	1%
Air Canada	1%
Air France	1%
American Airlines	1%
Lufthansa	1%
Norwegian Air	1%
Qatar Airways	1%
Turkish Airlines	1%
Other	2%
Don't know	1%

Last flight: Journey details (2)

Recency of last flight

	Oct '16	Mar '17	Oct '17
6 months+	19%	38%	22% ▼
4-5 months ago	18%	23%	18% ▼
2-3 months ago	35%	20%	33% ▲
Within last month	28%	19%	26% ▲

- ■ 6 months+
- ■ 4-5 months ago
- ■ 2-3 months ago
- ■ Within last month

Main flight purpose last flight

	Oct '16	Mar '17	Oct '17
Other			4%
Education/study reasons			1%
Business/work reasons	6%	8%	6%
Visiting friends or relatives	18%	18%	16%
Holiday	74%	71%	75%

- ■ Other
- ■ Education/study reasons
- ■ Business/work reasons
- ■ Visiting friends or relatives
- ■ Holiday

Cabin class

First class	1%
Business class	5%
Premium Economy	8%
Economy	84%
Don't know	4%
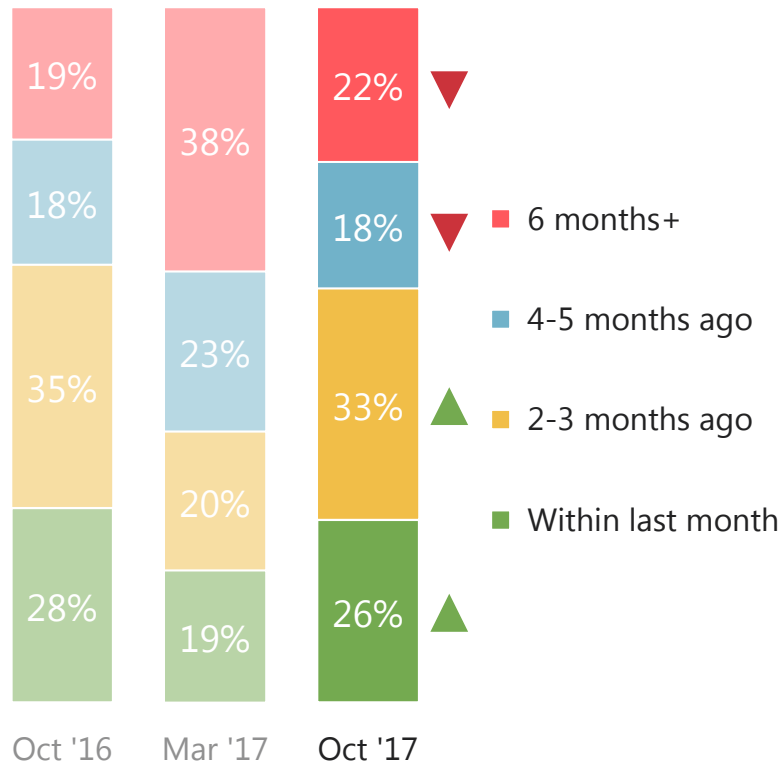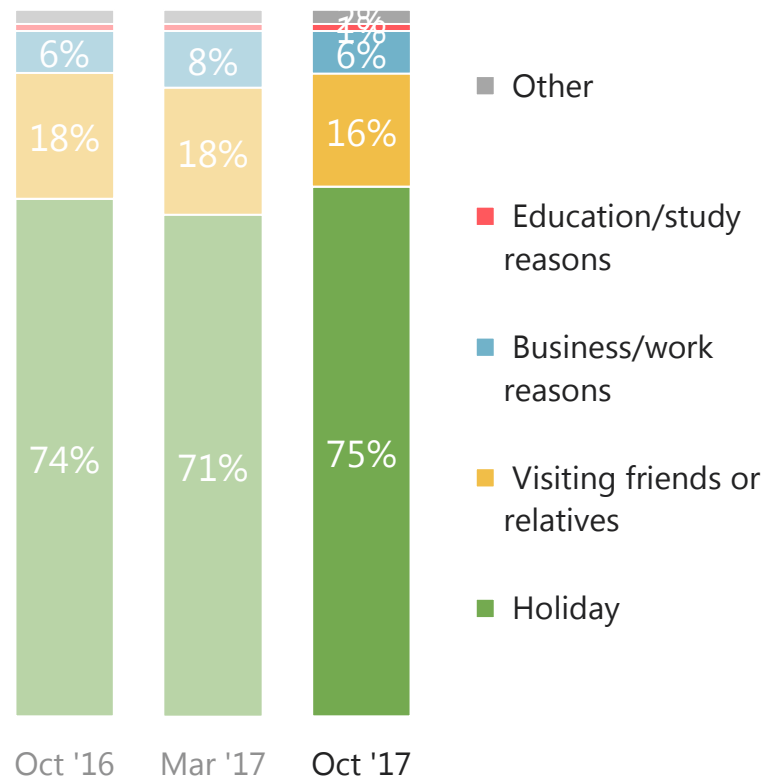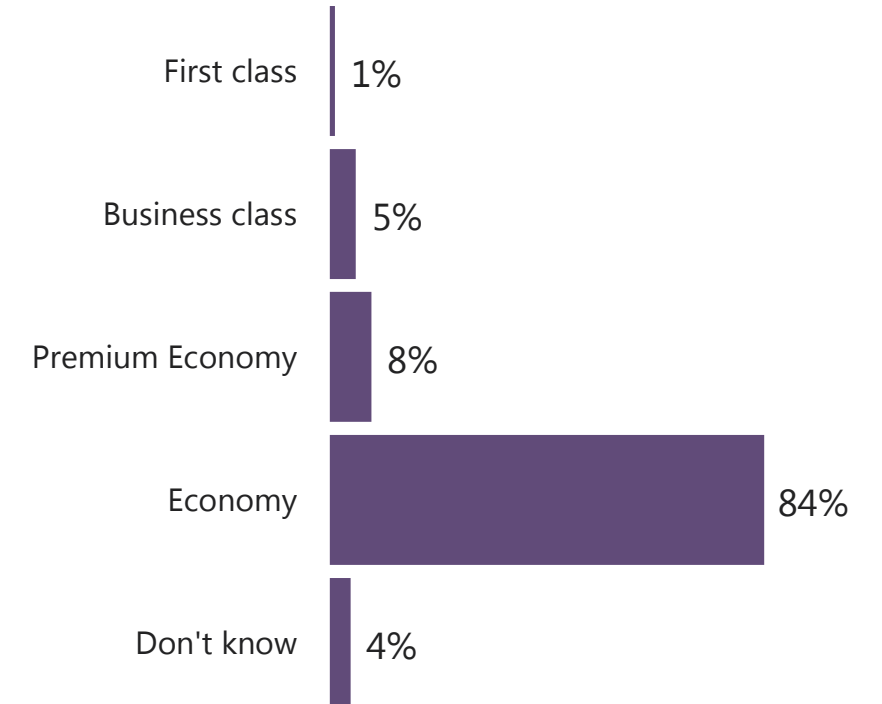
Last flight: Journey details (3)

6% were travelling with at least one person in the party requiring assistance and over one fifth were travelling with children. There is a significant increase in flyers not travelling with children.

Assistance needed last flight due to disability/health condition?

6% had at least one member of the party that required assistance

3% 3%

93%

- No
- Yes - self
- Yes - other
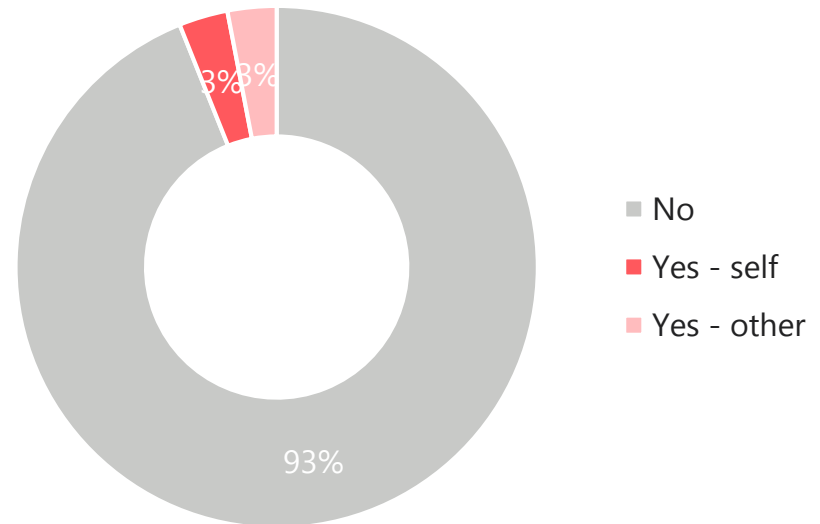
Travelling with children on last flight?

I did not travel with children — 79% ▼ (-4%)

Children aged 6 - 17 — 15%

Children aged 3-5 — 6%

Children aged 0-2 — 5%

20% travelled with children aged 0 -17

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Civil Aviation Authority
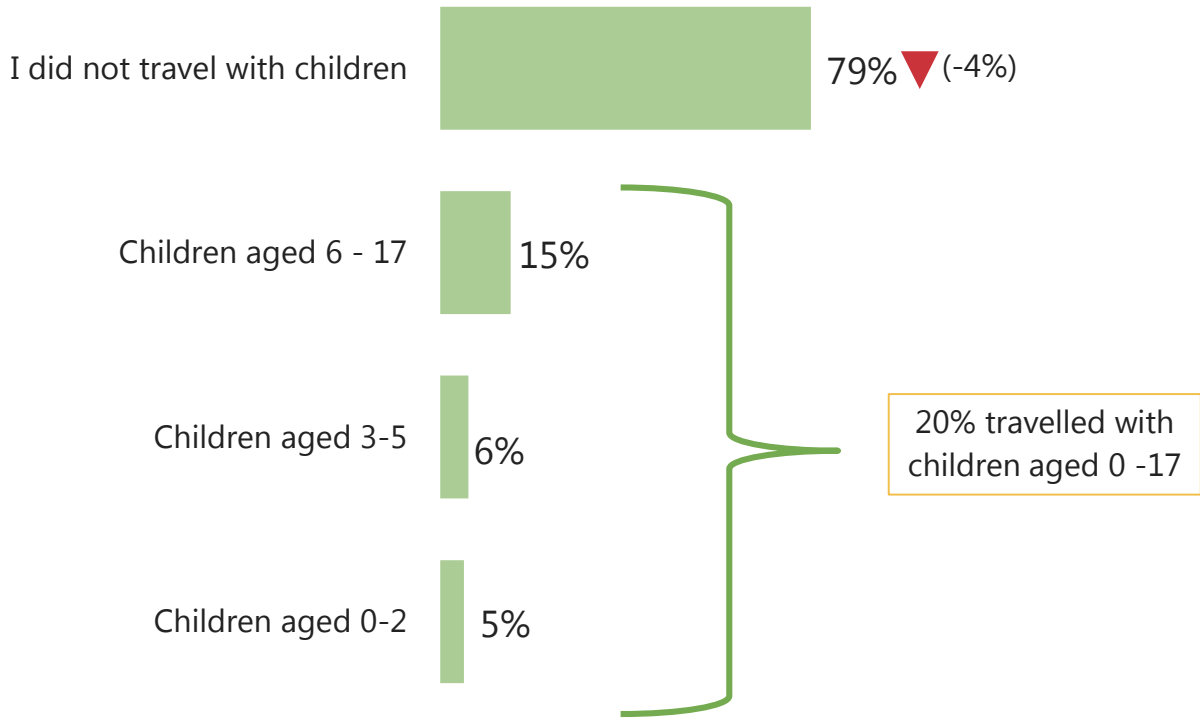
Last flight: Booking method

Half of travellers use the airlines they flew with to research their flight, and a similar proportion book directly with the airline itself. However, a minority research flights with other airlines. Comparison sites and holiday/tour companies are both more frequently used.

Research sources

Airline you flew with	51%
Flight or holiday comparison site	33%
Holiday company or tour operator	26%
Other airlines	15%
My business/work's travel agent/centre	3%
Travel service offered by bank/credit card	1%
Other	5%
Don't know/can't remember	8%
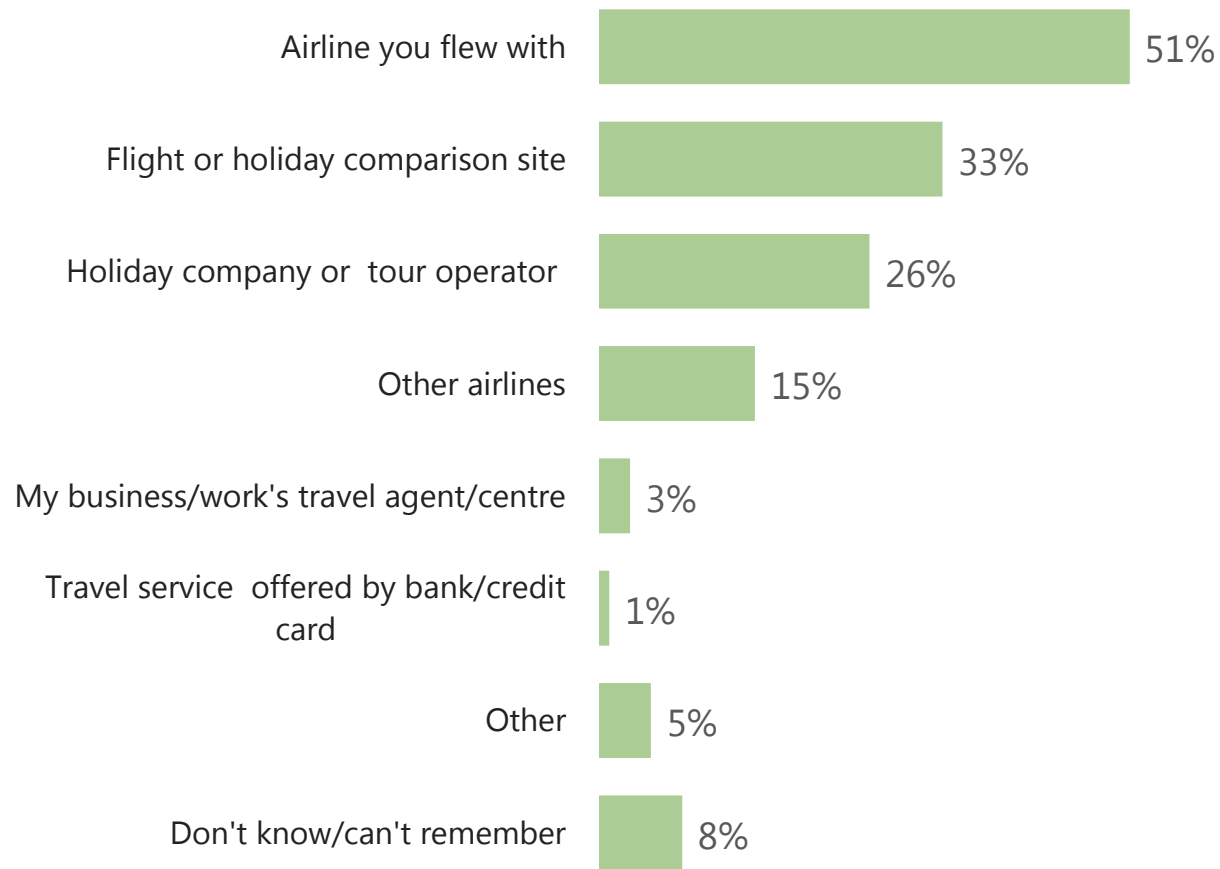
Booking method on last flight

■ Online ■ Offline

	Online	Offline	Total
Direct with the airline	49%	2%	51%
Through a travel agent, flight or travel comparison site	14%	6%	20%
Direct with the holiday company or tour operator	12%	8%	20%
Through my business/work's travel agent or travel centre			2%
Other			2%
Not involved			3%
Don't know			2%

Don't know 4%
Other 1%
Telephone 8%
Face to face 8%
Online 80%
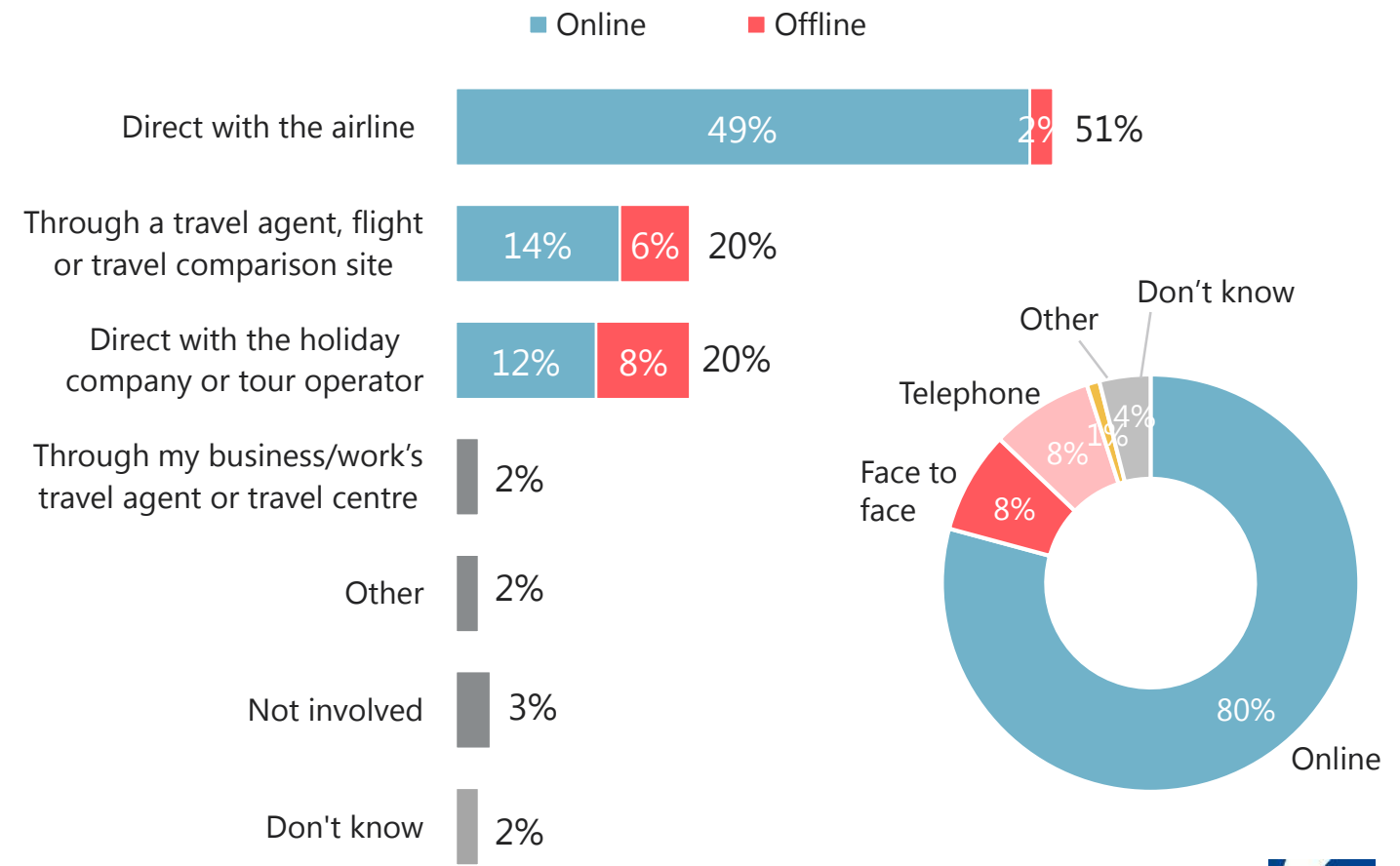
Extra information required when choosing and booking

Recent flyers express a desire for clarity around a number of areas, ranging from the size of luggage, transfer information and visas. Details about travelling with children and dietary requirements are again mentioned.

"With many airline websites, isn't as clear as it could be about which screens you can skip through without things being added automatically, e.g. insurance, car hire, etc."

"I was booking with miles and upgrade vouchers. It's not always easy to know what possibilities are available"

"The necessary visas needed for each person and how/when to apply for them."

"The only thing I found a little bit confusing was the direction to the car park. The website said to follow one set of signs, which I did, but it turned out I needed to be at the long stay car park so I had to go back."

"It was hard to find the exact measurements for the hold baggage. I knew that I was allowed 20kg. However the size of the actual hold luggage i.e. 120cm x 60cm was not specified and so I had to email the airline to find this information out."

"How to make my transfer flight in a very short time - very little information or detailed maps."

"Availability of vegetarian and vegan foods."

"When I use an airline which I am not familiar with, it can take a while to work out what is included and costs for what is not included."

"Working out how to travel with a young child: seating arrangements and baggage etc was rather confusing."

The importance of Surface Access

Travelling to and from the airport is important to the majority of recent flyers. For most, comparing different options is easy, but there is interest in a ticket that combines flight prices with transport prices to the airport.

How important is getting to and from the airport in your choosing the airport you flew from?

- 22% Essential
- 38% Very important
- 27% Fairly important
- 10% Not very important
- 4% Not at all important
- Don't know
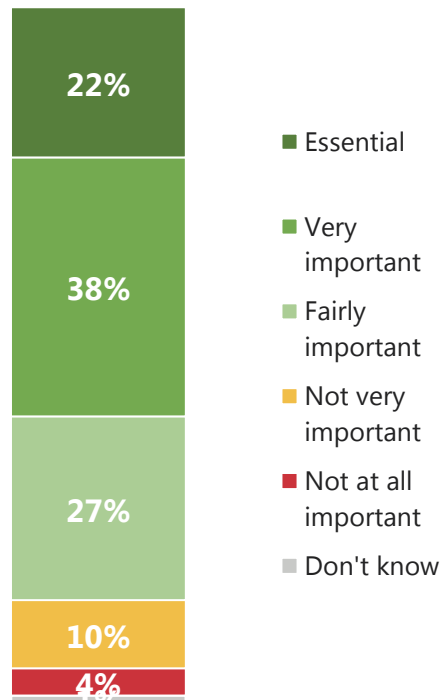
How easy was it to compare transport to and from different airports?

- 36% Very easy
- 52% Fairly easy
- 9% Not very easy
- 3% Not at all easy
- 25% Don't know/not applicable
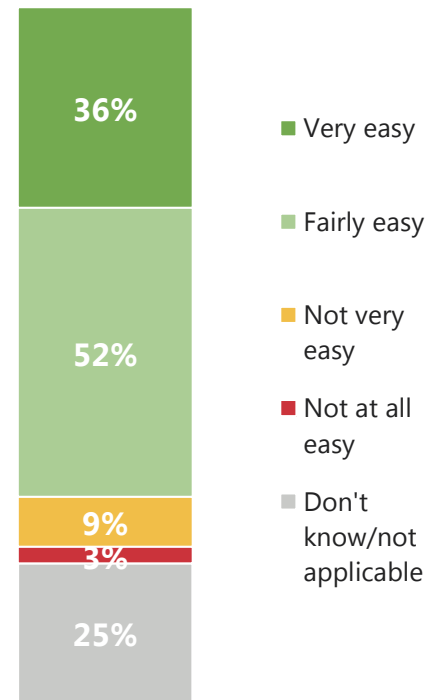
How easy was it to compare different types of transport to and from the airport you flew from?

- 36% Very easy
- 51% Fairly easy
- 10% Not very easy
- 3% Not at all easy
- 28% Don't know
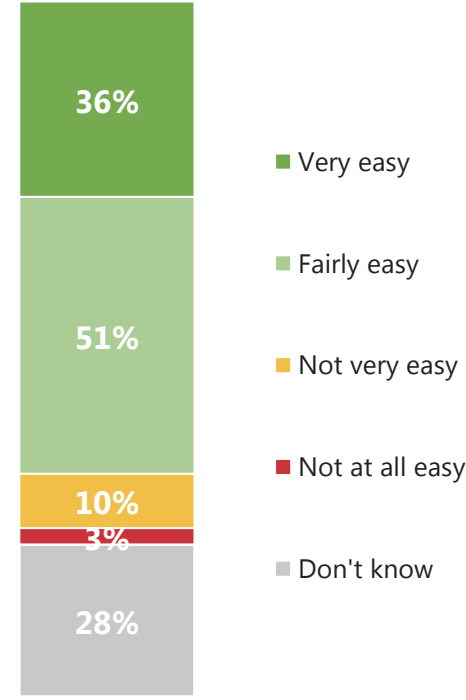
How interested would you be in buying a plane ticket that includes transport to and from the UK airport?

- 20% Very interested
- 45% Fairly interested
- 20% Not very interested
- 15% Not at all interested
- 9% Don't know
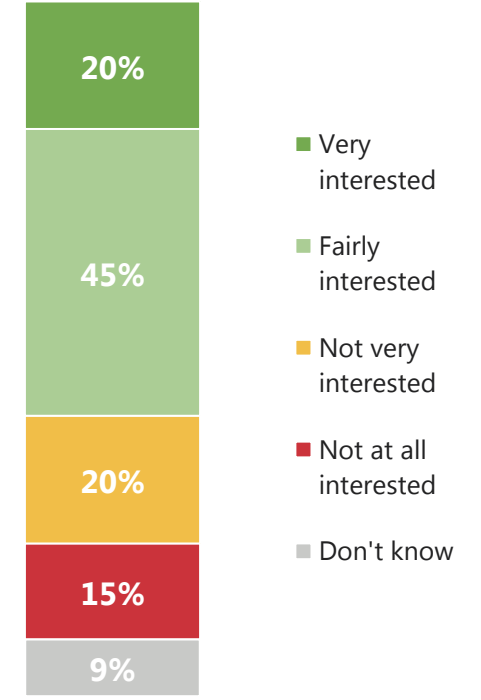
Q59a. Thinking back to when you were planning your last flight, how important was getting to and from the airport in your decision to fly from your chosen airport? Q59b. When you were comparing different airports, how easy was it to compare transport to and from your chosen airport, with transport options to and from other airports? Q59c. And now thinking about comparing different types of transport to your chosen airport, how easy or difficult was it to compare different transport options? Base: All who have flown in the last 12 months and remember UK airport (1,861) Q146. Now thinking about travelling in the future, to what extent, if at all, would you be interested in buying a ticket that includes transport to and from the airport in the UK as well as flights next time you fly? Base: All participants (3,504).

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Last flight: Overall satisfaction

Ratings of the overall experience tend to be very high, with 86% of recent flyers satisfied overall and one third very satisfied. There are clear differences among some groups, with PRM and those requiring assistance among those less satisfied.

Overall satisfaction with travel experience

90% 88% 87% 86%

3% 4% 4% 5%

Mar '16   Oct '16   Mar '17   Oct '17

— Satisfied   — Dissatisfied

34% ■ Very satisfied

52% ■ Fairly satisfied

■ Neither/ nor

9% ■ Fairly dissatisfied

■ Very dissatisfied
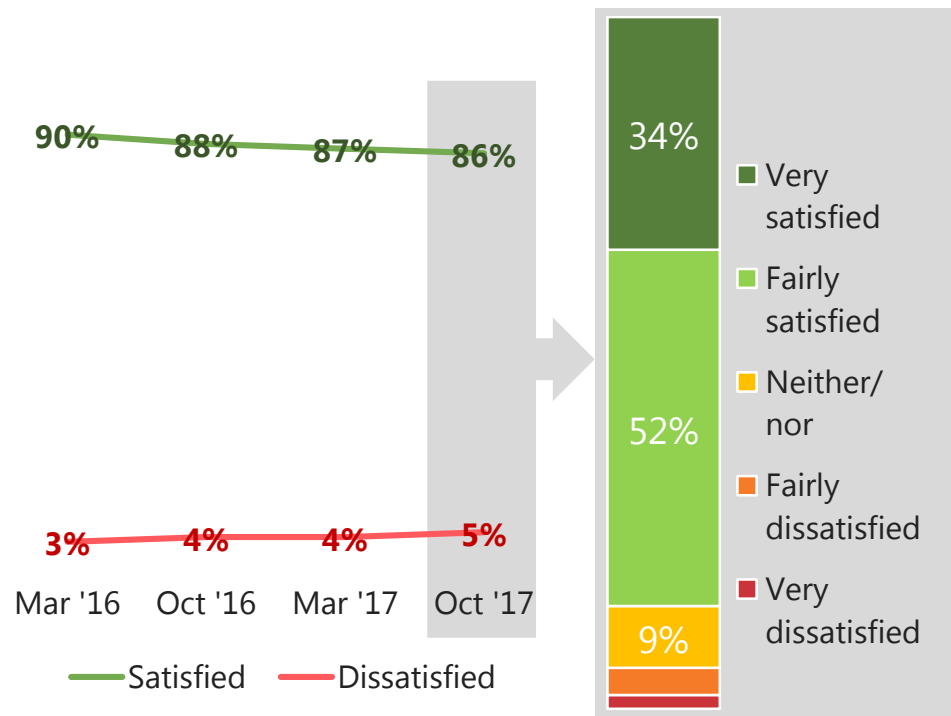
- With more than four in five satisfied with their recent flight experience overall, ratings are generally high across different groups. However, there is a slight but significant decrease on overall satisfaction since March 2016.

- With 81% satisfied PRM flyers rate the overall less highly than non-PRM flyers (87%). There is a particular challenge for PRM with non-physical disabilities, 74% of whom are satisfied with their experience of flying overall.

- 79% of those who required assistance were satisfied with their recent flight overall, compared with 87% of those who did not require assistance. Importantly, ratings among first time users of special assistance are lower, with 72% satisfied overall.

- Recent flyers using different cabin classes also express different levels of satisfaction. With 94% satisfied, it is Premium Economy passengers who are happiest with their experience, compared to 89% of those travelling First Class, 88% of those travelling Business and 85% travelling Economy.

- The impact of aggressive behaviour has an impact on the overall rating. Among recent flyers who witnessed or experienced aggressive behaviour, only 77% are satisfied.

- Virgin Atlantic customers rate the overall experience most highly, with 92% satisfied, although this difference is not statistically different compared to average.

- Disruption continues to have a substantial impact on the overall experience. Only 69% of those experiencing disruption were satisfied, compared to 93% of those who did not experience disruption.

PRM

Assistance

Cabin Class

Aggressive Behaviour

Airline

Disruption

Last flight: Satisfaction with elements of the journey

The process of deciding upon a flight and booking it are widely positive, with more than four in five recent flyers satisfied with these aspects.

Travelling to and from the airport is similarly positive but the airport experience falls behind other elements of the journey.

Oct '17

		Sat	Dissat
The process of booking the flight	8% / 41% / 48%	89%	3%
Deciding which flight to book	11% / 46% / 41%	86%	3%
Travelling to and from the airport in the UK	4% 10% / 38% / 46%	85%	5%
The airport experience in the UK	7% 12% / 43% / 35%	78%	10%

■ Very dissatisfied ■ Fairly dissatisfied ■ Neither/nor ■ Fairly satisfied ■ Very satisfied

% Satisfied

- The process of booking the flight: 88% (Mar '16), 89% (Oct '16), 88% (Mar '17), 89% (Oct '17)
- Deciding which flight to book: 87%, 85%, 86%, 86%
- Travelling to and from the airport in the UK: 84%, 84%, 83%, 85%
- The airport experience in the UK: 83%, 81%, 79%, 78%

Mar '16   Oct '16   Mar '17   Oct '17

Recent flyers tend to be positive about deciding which flight to book and the booking process. Crucially, ratings of both attributes are generally consistent across online and offline booking channels, and between different types of retailers. Satisfaction only drops among those booking through holiday companies online, of whom only 81% are satisfied with deciding which flight to book.

There is also some differences among travellers taking different types of flight, with long haul flyers more satisfied with the early researching phase of deciding which flight to book than those taking short-haul flights (91% satisfied compared to 84% satisfied). Satisfaction

with this stage also varies between passengers of different airlines, with British Airways and Virgin Atlantic customers particularly satisfied (91% and 94% satisfied respectively). The process of booking flights is also rated more highly by customers of these airlines (92% and 94% satisfied), although these differences are not statistically significant.

Ratings of travel to and from the airport are relatively similar between airports, but there is substantial differences across regions, with only 78% of those in the South West satisfied with this aspect of their trip. Variation between airports in terms of airport experience is minor and statistically insignificant, but travellers in the 18-24 age group are the most satisfied (85% satisfied compared to 78% overall).

Last flight: Satisfaction with elements of the journey

The-on-board and in-flight travel experience falls compared to October 2016, but remains relatively highly rated with more than three quarters of recent flyers satisfied with this aspect of their experience.

Oct '17

	Sat	Dissat
The on-board and in-flight experience	76%	8%
Value for money	74%	9%
Handling of any complaints made to airport/airline	53%	16%

The on-board and in-flight experience: 6% | 16% | 43% | 33%
Value for money: 7% | 17% | 43% | 31%
Handling of any complaints made to airport/airline: 9% | 7% | 31% | 31% | 22%

■ Very dissatisfied ■ Fairly dissatisfied ■ Neither/nor ■ Fairly satisfied ■ Very satisfied

% Satisfied

The on-board and in-flight experience: 81% (Mar '16) → 79% (Oct '16) → 78% (Mar '17) → 76% (Oct '17)

Value for money: 76% (Mar '16) → 76% (Oct '16) → 76% (Mar '17) → 74% (Oct '17)

Handling of any complaints made to airport/airline: 54% (Mar '16) → 58% (Oct '16) → 50% (Mar '17) → 53% (Oct '17)

Mar '16 — Oct '16 — Mar '17 — Oct '17

With 74% satisfied, travellers taking short haul flights are significantly less satisfied with their on-board and in-flight experience than those taking long haul flights, 81% of whom are satisfied. Differences emerge between airlines, with Virgin Atlantic the most highly rated airline (91% satisfied), and travellers flying in different cabin classes. Business class travellers are most satisfied with this aspect of their journey, with 86% satisfied.

Disruption has a substantial impact on how the on-board experience is rated as passengers'

frustrations dampen how this part of the journey is rated. Only 65% of those experiencing disruption are satisfied with their on-board and in-flight experience.

Ratings of value for money remain generally consistent, but the difference between short and long-haul passengers are reversed with travellers taking short-haul flights more satisfied (76% satisfied compared to 69% of long-haul passengers). Jet2 in particular is rated highly for this attribute, with 82% satisfied.

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Last flight: Satisfaction with elements of pre-booking

Most recent flyers are satisfied with the ease of finding information to compare their choices, but there are geographic and demographic differences in the level of satisfaction with the amount of choice between airports and airlines.

Oct '17

		Sat	Dissat
Ease of finding the information to compare the choices	17% · 47% · 31%	79%	4%
Amount of choice between UK departure airports	11% · 20% · 42% · 25%	67%	13%
Amount of choice between airlines	12% · 23% · 44% · 21%	64%	13%

■ Very dissatisfied ■ Fairly dissatisfied ■ Neither/nor ■ Fairly satisfied ■ Very satisfied

% Satisfied

Ease of finding the information to compare the choices: 77% (Mar '16), 79% (Oct '16), 78% (Mar '17), 79% (Oct '17)

Amount of choice between UK departure airports: 65% (Mar '16), 70% (Oct '16), 66% (Mar '17), 67% (Oct '17)

Amount of choice between airlines: 61% (Mar '16), 64% (Oct '16), 64% (Mar '17), 64% (Oct '17)

Mar '16   Oct '16   Mar '17   Oct '17

Recent flyers with more experience of flying continue to be the most satisfied with the ease of finding information to compare choices, with 83% of those who have flown four or more times in the last year satisfied (satisfaction among those who have flown one to three times is 77%).

There are no substantial differences between age groups for the ease of finding information, but 18-24 year olds are more satisfied than older travellers with both the amount of choice between both airports and airlines (73% and 74% satisfied respectively). Geographical differences also emerge for these two aspects. Recent flyers from Northern Ireland are much less satisfied with the amount of choice between airports, with only 52% satisfied, reflecting the number of airports available compared to other regions.

When it comes to choice between airlines, the number of airlines flying from London means that recent flyers from London are more satisfied (73%), whereas those from Scotland are less satisfied than average (56%). The number of airlines flying from Heathrow also mean that 71% of those who flew from Heathrow are satisfied with the choice between airlines. Additionally, long and mid-haul flyers are more satisfied than short haul passengers, with 70% satisfied compared to 62% of short haul passengers.

Last flight: Satisfaction with airport experience

Airports tend to be seen as navigable, with recent flights widely satisfied with the ease of finding their way around and to the gate.

Information provision and security are generally highly rated, but some groups are less satisfied with these aspects.

Oct '17

		Sat	**Dissat**
Finding your way to the gate	9% · 39% · 49%	88%	3%
Ease of finding your way around the airport in the UK	10% · 38% · 48%	87%	3%
Information about flight status at the airport in the UK	10% · 41% · 43%	84%	6%
Security at the airport in the UK	10% · 41% · 43%	84%	6%
Check-in and bag drop at the airport in the UK	11% · 44% · 37%	81%	7%

■ Very dissatisfied ■ Fairly dissatisfied ■ Neither/nor ■ Fairly satisfied ■ Very satisfied

% Satisfied

Finding your way to the gate

Ease of finding your way around the airport in the UK

Information about flight status at the airport in the UK

Security at the airport in the UK

Check-in and bag drop at the airport in the UK

	Mar '16	Oct '16	Mar '17	Oct '17
Finding your way to the gate	89%	89%		88%
Ease of finding	88%	88%	88%	87%
Information about flight status	88%		86%	86% → 84%
Security	85%	85%	82%	84%
Check-in and bag drop	85%	83%	83%	81%

Satisfaction with the airport experience continues to vary with age, with older travellers more satisfied with multiple aspects of this part of the travel experience. 85% of those aged 65+ were satisfied with their experience of check in and bag drop (compared to 81% overall) and 89% were satisfied with security (compared to 84% overall). When it comes to information about flight status there is also a difference, with 90% of those aged 55-64 and 87% of those aged 65+ satisfied, compared to 81% of millennials aged 18-34.

Disruption has a particular impact on ratings of information about flight status, with 74% of those experiencing disruption satisfied with this aspect of the airport experience, compared to 90% of those who did not experience disruption.

Security also divides those who required assistance at the airport, with 76% of this group satisfied with this aspect compared to 84% of those who did not require assistance.

Last flight: Satisfaction with airport experience

Whilst the airport experience is generally positive, and satisfaction ratings are high, these aspects, rated comparatively less highly than other parts of the airport experience, experience falls over the course of the last year.

Oct '17

	Sat	Dissat
Passport control in the UK (if applicable) — 11% / 40% / 39%	79%	10%
Baggage collection at the airport in the UK — 12% / 43% / 36%	79%	9%
Transfer / connection to another flight (if applicable) — 19% / 44% / 31%	75%	6%
Shops, restaurants and services provided at the airport in the UK — 16% / 41% / 34%	75%	9%

■ Very dissatisfied ■ Fairly dissatisfied ■ Neither/nor ■ Fairly satisfied ■ Very satisfied

% Satisfied

Passport / immigration control in the UK

Baggage collection at the airport in the UK

Transfer / connection to another flight (if applicable)

Shops, restaurants and services provided at the airport in the UK

83% → 82% → 82% → 79%
82% → 80%
78% → 78% → 76% → 75%
77% → 74%

Mar '16 — Oct '16 — Mar '17 — Oct '17

* Satisfaction with passport/immigration control in the UK and shops, restaurants and services provided at the airport in the UK both fall significantly since October 2016. Satisfaction with baggage collection at the UK airport has fallen significantly since Wave Three, March 2017.

Aside from satisfaction with transfers and connections, there have been statistically significant falls in each attribute over the course of the last year. Whilst these are not substantial drops, it indicates that some consumers are less satisfied with these attributes.

Of particular importance is the difference between PRM and non-PRM travellers. 66% of PRM travellers are satisfied with transfers and connection, compared to 77% of non-PRM. This difference also exists in ratings of airport security, where 78% of PRM are satisfied compared to 84% of non-PRM.

Compared to average among airports, Heathrow is rated particularly highly for the shops, restaurants and services provided (79% satisfied, compared to 75% overall), transfers and connections (82% satisfied, compared to 75% overall) and baggage collection (85% satisfied, compared to 79% overall).

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	85%	82%	84%	85%	86%
Recent airport experience	78%	79%	80%	76%	80%
Value for money	74%	75%	**63%**	**76%**	75%
Check in and bag drop	81%	83%	82%	80%	81%
Security	84%	87%	84%	82%	84%
Passport control/ immigration	79%	80%	79%	77%	80%
Flight status information	84%	85%	88%	83%	85%
Finding way around airport	87%	89%	86%	85%	89%
Shops and restaurants	75%	75%	**79%**	74%	72%
Finding way to gate	88%	89%	91%	88%	87%
Transfer/connection to another flight	75%	70%	**82%**	70%	**81%**
Baggage collection	79%	80%	**85%**	76%	80%

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.

** CAUTION LOW BASE

Q60 and Q63. 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: 1538-1853, Gatwick: 257-314, Heathrow: 241-281, Other large airports: 707-845, Other airports: 332-397), except 'Transfer/connection to another flight (Overall: 641, Gatwick: 97*, Heathrow: 124, Other large airports: 277, Other airports: 143),

Understanding dissatisfaction with travel experience

Poor service and communication contribute to dissatisfaction.

"Flight delayed a few hours. Then plane was boarded but had to get back off. Flight delayed a few more hours. Then flight cancelled until next day. Had to stay in poor accommodation. Then next day's flight delayed. Then when flight arrived it missed the connecting flight. No services available, counter closed, had to sleep in a locked airport."

"I was on my own with two children and a buggy and received a buggy tag at the gate to take my buggy to the plane. I was shown through to the departure lounge and then to get to the plane there were 2 large flights of stairs. No members of staff informed me of this, I was very cross."

"Endless unexplained delays; made to stand for hours in a draughty stairwell and landing. No information, ever. Treated worse than cattle. Large delays not compensated."

"The seats on the plane were too close together for anyone over 5ft 6", people in front put their seat back and you end up watching a film with the screen 6" from your face! Airports never have enough seats and it's horrible having to walk a very long way through the extremely expensive shops before you get to them."

"The flights and meals were fine, however we had to put up with foul language and 3 drunk ladies sitting next to us and our young children. When we complained to airline said we should have raised an issue while on the flight!"

"Delayed flight - poor communication. Flight crew generally rude and unhelpful. Food was the worst ever experienced in 40+ years of travelling. No Premium Economy available on flight, and poor choice of entertainment."

"Flight was delayed with no information but kept waiting at gate for extra hour. on return flight was delayed again. prices at airport for water are extremely inflated."

"Self service tills in airport failed. Both flights were delayed. A/C did not work whilst on-board, on the tarmac, on both flights Not sufficient food on the flights Service was slow and poor on-board."

"The airlines allow passengers to carry to much luggage on board. And if they have to ask them to put it in the hold they don't pay, I have too pay for my cases. There is also not enough leg room."

Disruption and complaint handling

Ipsos Loyalty
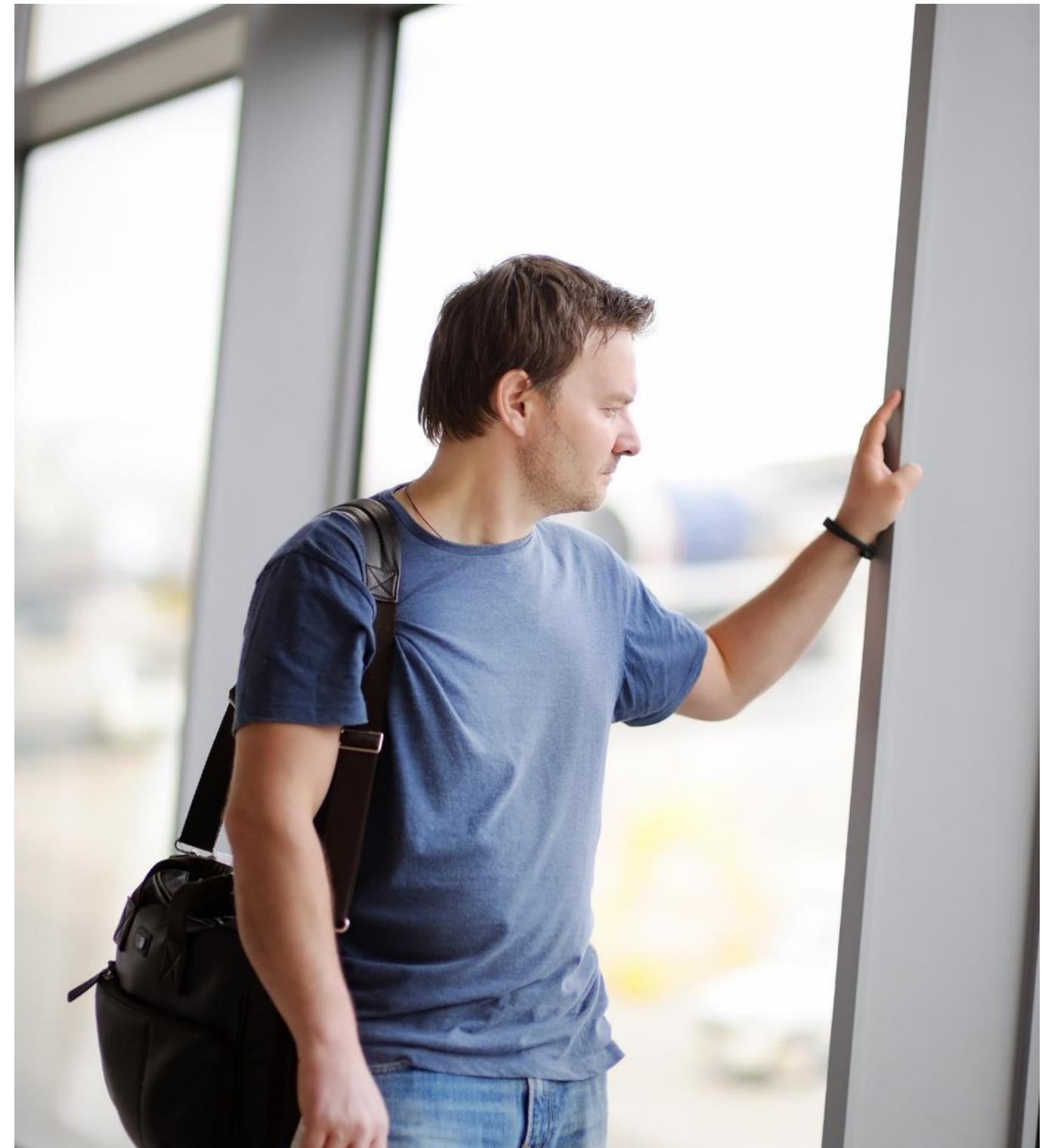
Disruption and complaint handling - summary

Long queues and crowding at the airport are the most frequent issues experienced when travelling by plane. Complaint handling is rated poorly compared to other aspects of the flying experience, and many do not complaint formally because of the perceived time and effort involved.

- **Disruption is experienced by many recent flyers, who report high levels of dissatisfaction with how the issue was resolved at the time.**

  - Long queues and crowding at the airport are the most widely reported forms of disruption, with one in five (19%) of recent flyers experiencing this issue. Less than one in five (17%) were satisfied with how the queues and crowding was dealt with, and more than half (58%) are dissatisfied with how this issue was resolved at the time.

  - Delays of up to two hours and a delay after boarding the aircraft are the next most commonly experienced forms of disruption (with 13% of recent flyers experiencing these disruptions), but consumers are more divided on how well these issues are dealt with.

  - Delays at immigration and long waits for luggage are the most dissatisfying forms of disruption, with 67% and 62% of those who experienced these issues dissatisfied.

  - One third (32%) of those experiencing delays were not informed of the cause. Mechanical/equipment failure (17%) and adverse weather (14%) are the most commonly given reasons for delays, but there have been significant increases in the proportion of delays attributed to earlier/incoming flights being delayed and air traffic control problems.

- **Ratings of complaint handling is mixed, with comparatively high levels of dissatisfaction compared to the rest of the airport experience.**

  - Ratings of the outcome of any complaints are split, with one in three satisfied (32%) and a similar number dissatisfied (31%).

  - Satisfaction has fallen and dissatisfaction for a number of specific aspects of complaint handling: only one third are satisfied with speed of response, redress offered and how well informed they were kept during the process, and more than two in five were dissatisfied with these elements.

- **Only half (54%) of those who considered making a formal complaint actually made one. The main barrier is the belief that it would take too much time and effort.**

- **Similarly, the main reason that almost nine in ten (87%) did not escalate their complaint to a third party is the belief that the process would take too much time and effort.**

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Last flight: Travel disruption

45% of recent flyers had what they perceive as disruption on their last flight. A fifth of these experienced long queues or overcrowding, with flight delays of up to 2 hours and delays on the tarmac the next most common. Immigration and luggage delays result in the highest dissatisfaction.

Satisfaction with how issue was handled at the time

		Satisfied	**Dissatisfied**
Long queues/crowding in the airport	19%	17%	58%
Flight delay of up to 2 hours	13%	41%	33%
Delay taking off after boarding the aircraft	13%	43%	35%
Delay at immigration	9%	15%	67%
Delay or long wait for luggage	8%	13%	62%
Flight delay of 2 hours or more	3% *	33%	57%
Loss or damage to luggage	3% *	22%	56%

Satisfaction bars:
- Long queues/crowding in the airport: 2% / 15% / 26% / 35% / 21% / 2%
- Flight delay of up to 2 hours: 8% / 33% / 24% / 24% / 10% / 1%
- Delay taking off after boarding the aircraft: 10% / 32% / 24% / 25% / 10% / 1%
- Delay at immigration: 2% / 13% / 18% / 35% / 31% / 3%
- Delay or long wait for luggage: / 13% / 26% / 35% / 26% / 2%
- Flight delay of 2 hours or more: 9% / 21% / 10% / 24% / 35% / 2%
- Loss or damage to luggage: 10% / 14% / 26% / 22% / 28% / 11%

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

- - - Average Satisfaction

- ■ Very satisfied
- ■ Fairly satisfied
- ■ Neither satisfied nor dissatisfied
- ■ Fairly dissatisfied
- ■ Very dissatisfied
- ■ Don't know

* CAUTION LOW BASE

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Last flight: Travel disruption

Four in ten delayed passengers do not know the reason for the delay, either saying they weren't informed or that they simply don't know.

Satisfaction with information, suitable arrangements made or outcomes of complaints in the event of a disruption, is mixed.

Causes of disruption and satisfaction with problem handling

Satisfied

Cause	%
I was not informed of the cause	32%
Mechanical/equipment failure	17%
Adverse weather	14%
Earlier/incoming flight delayed	11% ▲ (+7%pts)
Congestion /capacity	9%
Runway congestion	9%
Industrial action/strike	6%
Air traffic control problems	3% ▲ (+3%pts)
Staff not available / lack of staff	2%
No answer	2%
Other	8%
Don't know	10%

Information and updates provided to you or other passengers on the situation

Very satisfied	Fairly satisfied	Neither/nor	Fairly dissatisfied	Very dissatisfied
17%	27%	20%	22%	14%

Satisfied: **44%**

Outcome of any complaints you made to the airport, airline or holiday company about the travel issues

Very satisfied	Fairly satisfied	Neither/nor	Fairly dissatisfied	Very dissatisfied
12%	21%	36%	10%	21%

Satisfied: **32%**

Arrangements made to look after you or other passengers (food/drink, accomodation, alternative travel)

Very satisfied	Fairly satisfied	Neither/nor	Fairly dissatisfied	Very dissatisfied
9%	21%	31%	20%	19%

Satisfied: **31%**

■ Very satisfied ■ Fairly satisfied ■ Neither/nor ■ Fairly dissatisfied ■ Very dissatisfied

Satisfaction with complaint handling aspects

Satisfaction with aspects of the complaint handling process is low, with at least a third dissatisfied across aspects. Over two in five are dissatisfied with each of the speed of response, redress offered and being kept informed with progress.

	How helpful and friendly the people dealing with your complaint were	How fairly you were treated	The speed of response to your complaint	Redress offered (including but not limited to financial compensation)	How well informed kept in relation to the progress or resolution of your complaint
Satisfied	41%	37%	34%	33%	33%
Dissatisfied	36%	35%	44%	44%	46%
Very satisfied	18%	17%	15%	15%	11%
Fairly satisfied	23%	20%	19%	18%	22%
Neither/nor	24%	27%	20%	22%	22%
Fairly dissatisfied	13%	13%	17%	15%	20%
Very dissatisfied	23%	22%	27%	29%	26%

Legend: Very satisfied, Fairly satisfied, Neither/nor, Fairly dissatisfied, Very dissatisfied, Too early to say

Satisfaction with assistance at each point in the journey

Dissatisfaction with the speed of response to complaints and redress offered have significantly increase since Autumn 2016.

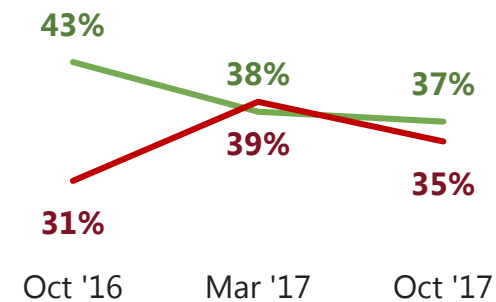### Helpfulness and friendliness of people dealing with complaint

45% → 35% → 41%

35% — 35% — 36%

Oct '16   Mar '17   Oct '17

How fairly you were treated

43% → 38% → 37%

31% → 39% → 35%

Oct '16   Mar '17   Oct '17

The speed of response to your complaint

43% → 37% → 34%

31% → 35% → 44% △

Oct '16   Mar '17   Oct '17

Redress offered

36% → 32% → 33%

32% → 43% → 44% △

Oct '16   Mar '17   Oct '17

How well informed kept about progress or resolution

38% → 34% → 33%

37% → 39% → 46%

Oct '16   Mar '17   Oct '17
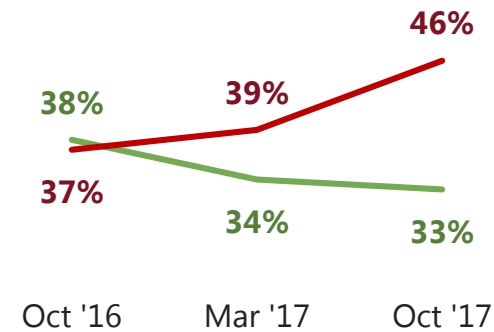
— Satisfied
— Dissatisfied

CAUTION: LOW BASES

Satisfaction with complaint handling aspects

Slightly fewer than a fifth of those who had a travel problem considered making a complaint. Around a quarter of these did not go ahead with their complaint due to the perception it would take up too much time and effort.

Did you consider making a formal complaint?

- Yes — 18%
- No — 82%
- Don't know/ can't remember — 1%

Formal complaint actually made?

- Yes — 54%
- No — 46%
- Don't know/ can't remember — 1%
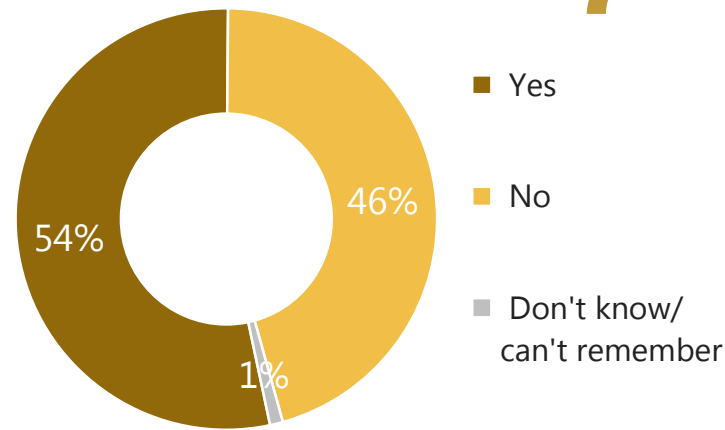
Reason for not making a complaint*

It would have taken too much time and effort	55%
Was not aware that I could complain	7%
Did not want to discuss the issue	7%
Was able to resolve issue before making a complaint	5%
Other	42%

* CAUTION LOW BASE

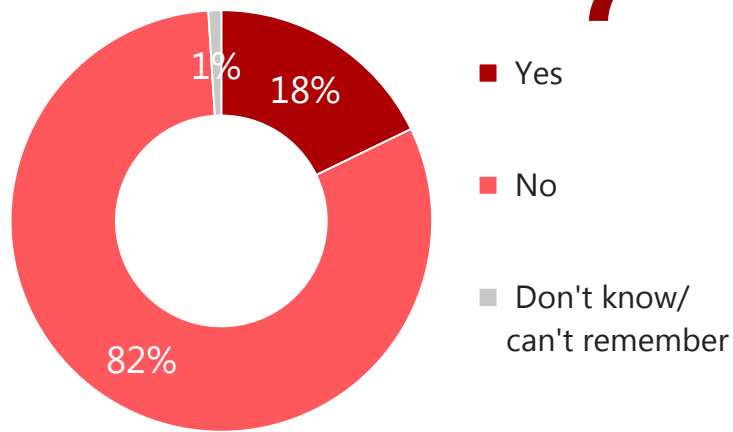Q87a. Did you consider making a formal complaint to the airport, airline or holiday company about your travel issue? Base: All flown in the last 12 months and travel issues experienced (673), Q87b. And did you actually make a formal complaint to the airport, airline or holiday company about your travel issue? Base: all who considered making a compliant (123), Q87c. Why did you not make a complaint to the airline, airport or travel company? Base : All who considered but did not make a complaint (56*)

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Understanding dissatisfaction with handling of problems

A lack of information and staff are frequently mentioned in relation to dissatisfaction: managing expectations is key.

We were not kept informed as to why there was a delay, or how long it was to be.

A long wait for baggage with no information of the timescale in Manchester. Queuing for the bag drop was unacceptable: over an hour, which makes booking in online a waste of time.

We were given no reason or information.

No-show passengers were given extra time to board – why? Then more time was wasted in having their baggage removed from the hold. Cabin staff were unconcerned that on-board passengers were complaining about the delay. There was no compensation for wait, i.e. a free coffee.

The wait took longer than expected and at times it felt that the airport staff were doing nothing with the flight's luggage. It was probably the longest wait for luggage alone I've experienced. There was no information at the luggage arrival terminal stating that this was the right one for the flight, or how long the luggage would take. There was insufficient options to purchase refreshments. I was concerned that I'd miss my booked shuttle bus to the city. There were not many seats in the area to use. There was still customs to go through.

Very long queue to drop of baggage, very disorganised and not enough staff on checking points.

There were too few personnel handling the number of passengers meaning the queue was down a flight of stairs: both annoying and dangerous.

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 majority did not escalate their complaints. Of those that did not escalate, two in five thought this this was because it would take too much time or effort and one in five were not aware of who to complain to.

87% did not escalate to any other organisation

Why complaint not escalated

Would take too much time/effort	40%
Airline/airport resolved issue	21%
Not aware of other organisations to complain to	20%
No longer wanted to discuss issue	19%
Other	16%
Don't know	7%
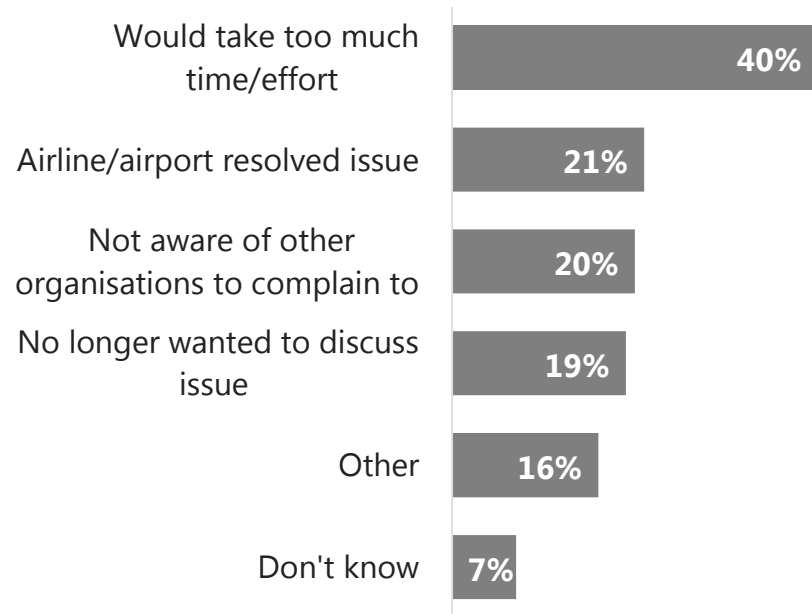
% escalating complaint to third party

Don't know/can't remember	7%
CAA Passenger Advice and Complaints Team (PACT)	2%
The Centre for Alternative Dispute Resolution (CEDR)	2%
Airline Dispute Resolution (The Retail Ombudsman)	1%

6%
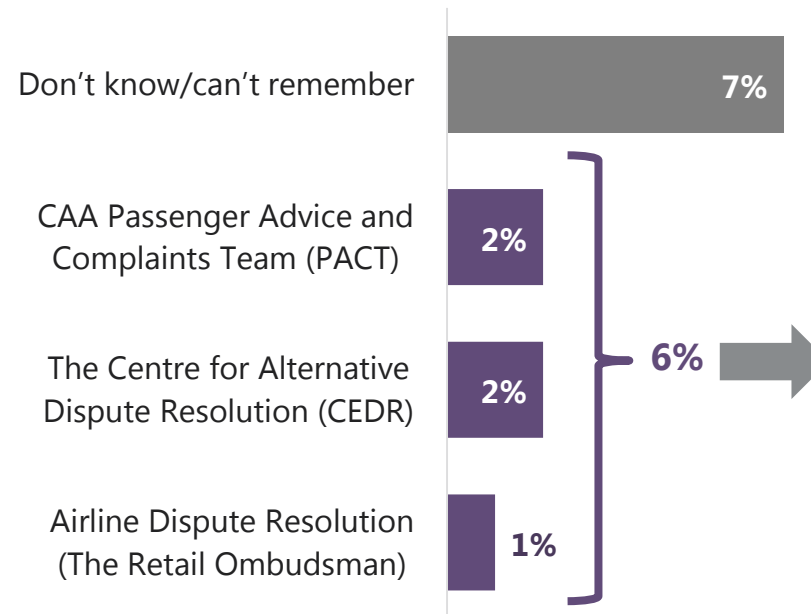
Satisfaction with complaint handling amongst those who escalated their complaint**

18%	47%	17%	13%	6%

64%   **19%**

- ■ Very satisfied
- ■ Fairly satisfied
- ■ Neither satisfied nor dissatisfied
- ■ Fairly dissatisfied
- ■ Very dissatisfied
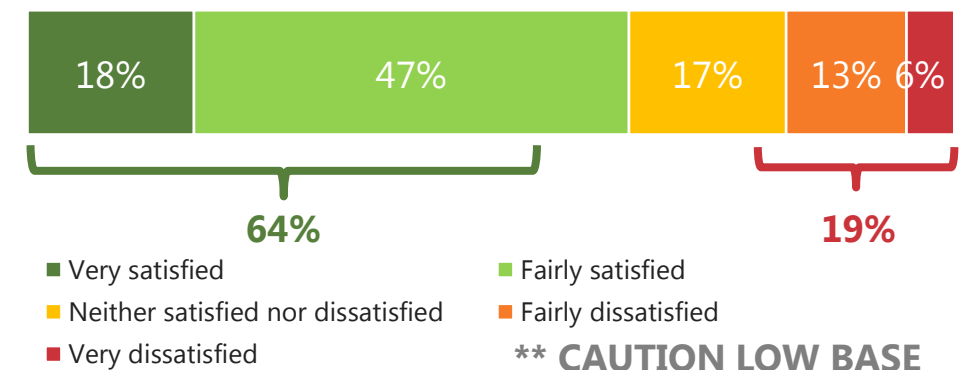
**** CAUTION LOW BASE**

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 (284); 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 (284); Q88. Why did you not escalate your complaint to another organisation? Base: all who did not escalate their complaint (250); 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 (17** CAUTION LOW BASE)

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Disruptive passenger behaviour

One in five of those who have flown in the last three years report experiencing aggressive or drunken behaviour when flying.

Have you ever experienced aggressive behaviour during a flight?

No — 82%

Yes, I've witnessed aggressive behaviour, but not towards anyone in particular — 10%

Yes, I've seen another passenger being aggressive towards someone else — 8%

Yes, another passenger has been aggressive towards me — 2%

Don't know/ can't remember — 2%

18% experienced aggressive behaviour when flying

Frequency of experiencing aggressive behaviour

Once — 51%

Two or three times — 44%

Four or more times — 5%

Recency of experiencing aggressive behaviour

More than two years ago — 55%

Between a year and two years ago — 22%

Between six months and a year ago — 14%

In the last six months — 10%

Q144. Thinking about all the times you have travelled in the past, have you ever experienced aggressive or drunken behaviour from fellow passengers during a flight? Base: All who have flown in last three years (3,288) Q145a. How frequently have you experienced aggressive behaviour when travelling by plane? Q145b. Can you tell us how recently you experienced this aggressive or drunken behaviour? Base: All who have experienced aggressive behaviour (593).

Disruptive passenger behaviour

Those who experienced or witnessed aggressive behaviour report higher levels of dissatisfaction overall with their most recent travel experience compared to those who did not witness such behaviour

Satisfied
- Total: 86%
- Experienced/ witnessed aggressive behaviour: 77% ↓
- Did not experience aggressive behaviour: 88%

Neither satisfied or dissatisfied
- Total: 9%
- Experienced/ witnessed aggressive behaviour: 15% ↑
- Did not experience aggressive behaviour: 8%

Dissatisfied
- Total: 5%
- Experienced/ witnessed aggressive behaviour: 8%
- Did not experience aggressive behaviour: 4%

Significantly higher/ lower than Total ↑ ↓

■ Total   ■ Experienced/ witnessed aggressive behaviour   ■ Did not experience aggressive behaviour

Q61. Now taking all the above elements into account, how satisfied or dissatisfied were you with the overall travel experience on this most recent occasion? (Total 1,857; Experienced/witnessed aggressive behaviour 317; Did not experience aggressive behaviour 1,540)

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Experience of PRM

Experience of PRM - summary

PRM are less likely to fly than non-PRM, due to budget constraints and the obstacles posed by disabilities and health conditions. PRM that do fly are less likely to be satisfied with the airport experiences than non-PRM. Assistance provided is rated highly, but awareness is limited among PRM.

- **Half of PRM believe that their disability makes flying difficult: consequently, they are significantly less likely to have flown in the last year than non-PRM. Many state that their disability is the reason they have not flown in the last year.**

    - PRM are almost half as likely to have flown in the last year compared to non-PRM (30% compared to 59%). PRM are significantly more likely to have last flown more than four years ago, and are twice as likely to have never flown than non-PRM (10% compared to 5%).

    - 36% of PRM cite disability as a specific factor in their decision not to travel by air.

- **Satisfaction with the overall airport experience is lower among PRM, with 72% satisfied compared to 79% of non-PRM. Ther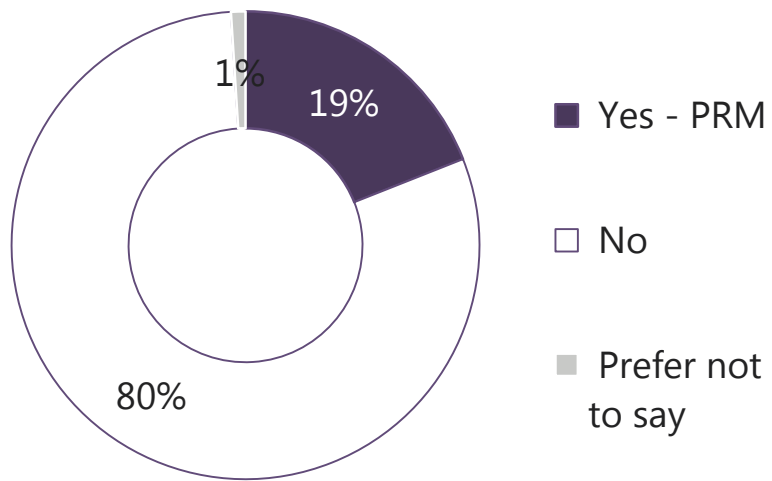e are significant differences too when focusing on more specific touchpoints, including security and ease of navigating the airport.**

    - There are significant differences in PRM and non-PRM's experiences of navigating the airport (80% of PRM are satisfied with finding their way around the airport, compared to 87% of non-PRM; 84% of PRM are satisfied with finding their way to the gate, compared to 89% of non-PRM). Unlike last wave, the two groups shown very similar levels of satisfaction and dissatisfaction with complaints handling.

- **Assistance continues to be rated highly: again, more than half state that they are 'Very Satisfied' with the assistance they received overall. Awareness is limited and many do not feel well informed about assistance available.**

    - Assistance is rated highly at every step of the journey. The highest scores are achieved at pre-booking (89% satisfied). Improvements could be made when assisting with seating on board the aircraft, and with the carriage of any special mobility items (75% and 71% respectively were satisfied with assistance at these points)

    - Full awareness of assistance available is much higher among frequent flyers than overall (40% among those who have flown in the past 12 months, compared to 20% overall). Overall, almost one in five PRM do not know who they need to contact to request assistance

    - The majority of PRM (65%) believe they need to inform the airline to require assistance. One in two believe they need to inform the airline and the same number believe they need to inform the holiday company

Ipsos Loyalty

PRM profile

One in five passengers are PRM. PRM have an older age profile than non-PRM; however, there are no significant differences in gender.

Disability or health condition?

1%
19%
80%

- ■ Yes - PRM
- □ No
- ■ Prefer not to say

Gender

48% 52%

49% 51%

Age

26%
23%
20%
18% 18% 18%
17%
16%
14%
13%
12%
6%

18-24 25-34 35-44 45-54 55-64 65+
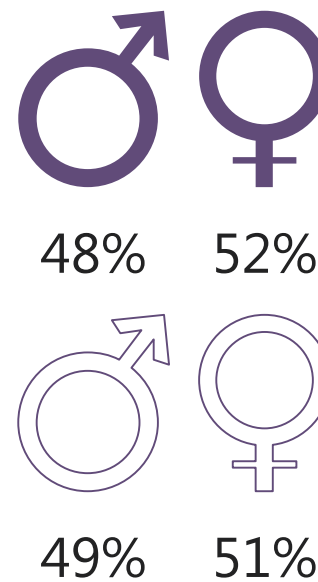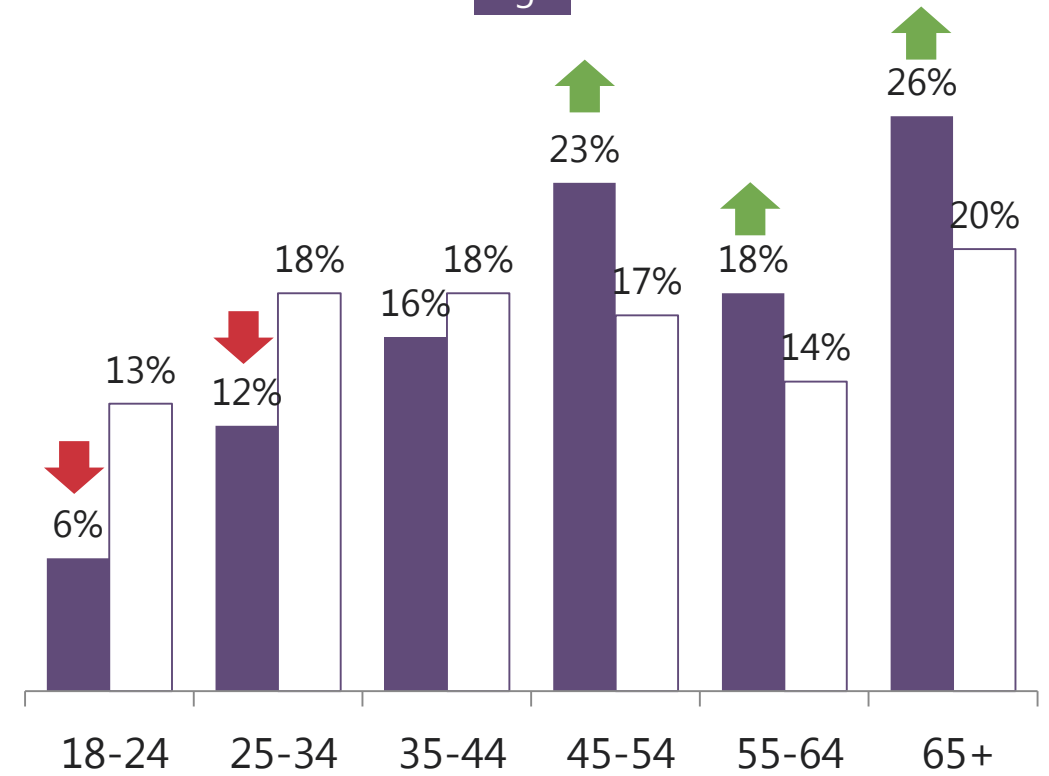
■ PRM □ Non-PRM

⬆ ⬇ = significant difference v Non-PRM

PRM profile

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

2%
43%
55%

- ■ Yes
- □ No
- ■ Prefer not to say
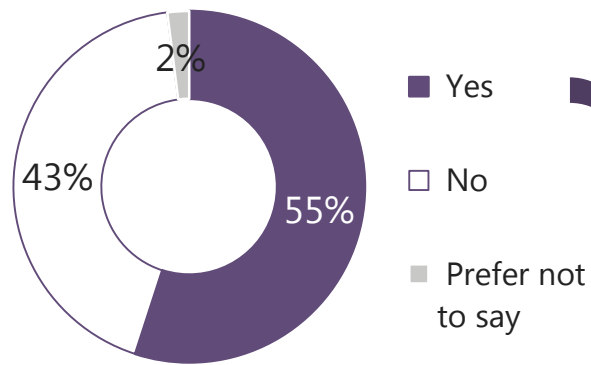
Disability or health condition means assistance would be needed when taking a flight

3%
32%
66%

- ■ Yes
- □ No
- ■ Prefer not to say
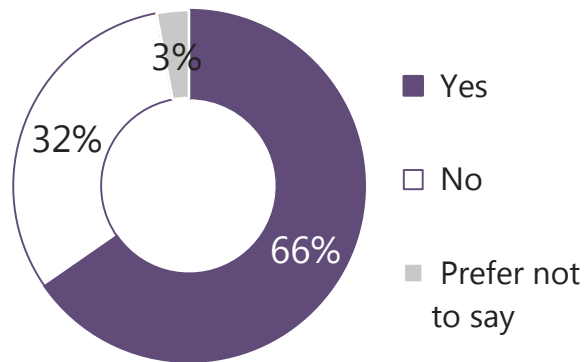
Is disability physical/non-physical or both?

2%
25%
19%
54%

- ■ Physical
- ■ Non-physical
- ■ Both
- ■ Prefer not to say
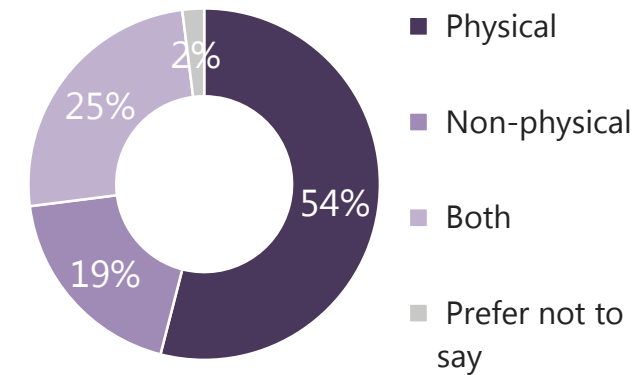
Is disability hidden/non-hidden or both?

1%
25%
16%
58%

- ■ Hidden
- ■ Non-hidden
- ■ Both hidden and nonhidden
- ■ Prefer not to say

Q31. Does/would your disability make accessing/using airports/flying difficult? Base: All PRM (654) | Q32. Would you classify your disability as physical/non- physical/both? Base: All PRM (online participants only, 606) | Q32b. Would you classify your disability as hidden/non-hidden/both/both? Base: All PRM (online participants only, 606) | 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 (357)

PRM: Flying behaviour overview

PRM are less likely to have flown recently than non-PRM and are significantly more likely than PRM to have last flown four or more years ago, or to never have flown. Among recent flyers, PRM are less likely than non-PRM to have taken more than one flight in the last 12 months.

Last flown from a UK airport

■ Non-PRM ■ PRM

Category	Non-PRM	PRM
Within the last 12 months	59%	30% ↓
Between 1 and 3 years ago	16%	17%
Between 4 and 10 years ago	12%	21% ↑
More than 10 years ago	8%	20% ↑
Never	5%	10% ↑
Don't know	1%	1%
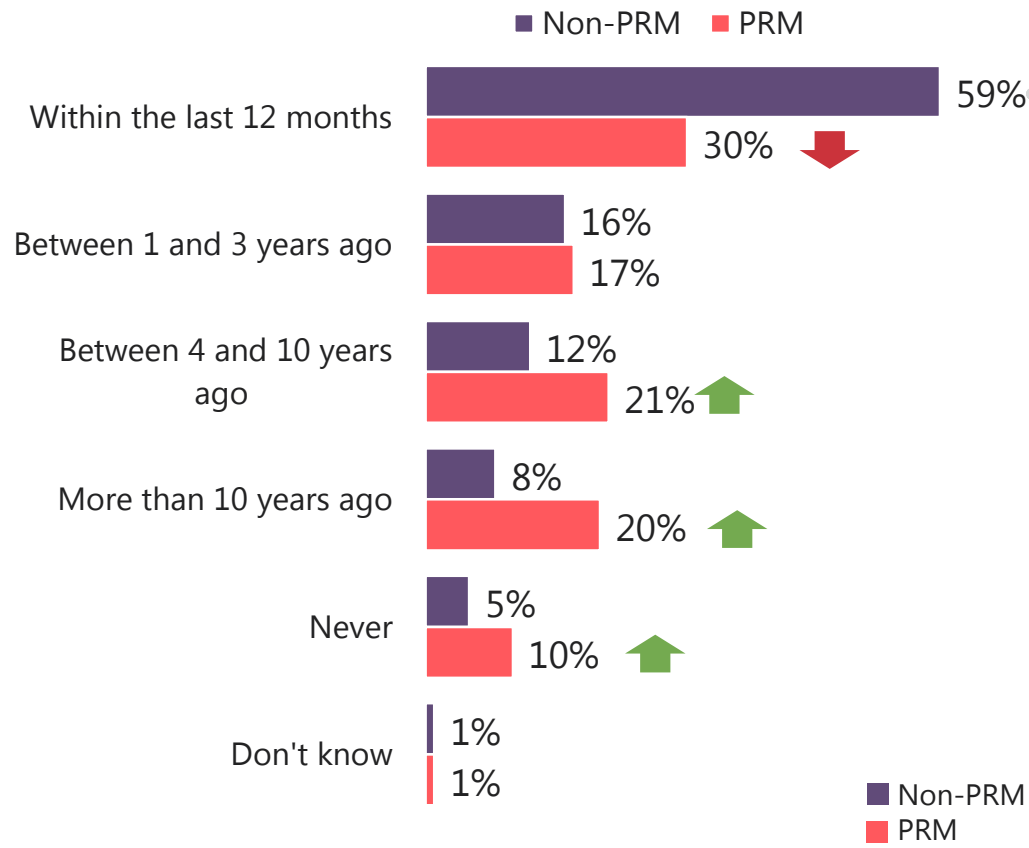
■ Non-PRM
■ PRM

Flights in last 12 months

Category	Non-PRM	PRM
One	34%	43% ↑
Two	28%	33%
Three	14%	13%
Four +	24%	11% ↓

■ Non-PRM
■ PRM

↑ ↓ = significant difference v non-PRM
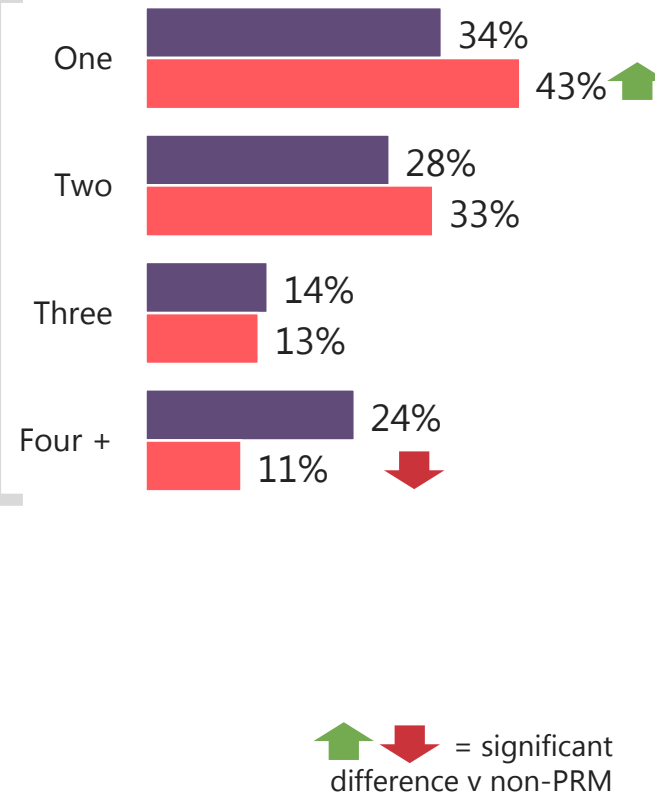
Flying frequency in next 12 months

PRM (inner ring): More 20%, Same amount/no change 62%, Less 12%, Don't know 6%

Non-PRM (outer ring): More 18%, Same amount/no change 57% ↓, Less 14%, Don't know 11%

PRM   Non-PRM
■ More
■ Same amount/no change
■ Less
■ Don't know

Ipsos Loyalty

Civil Aviation Authority
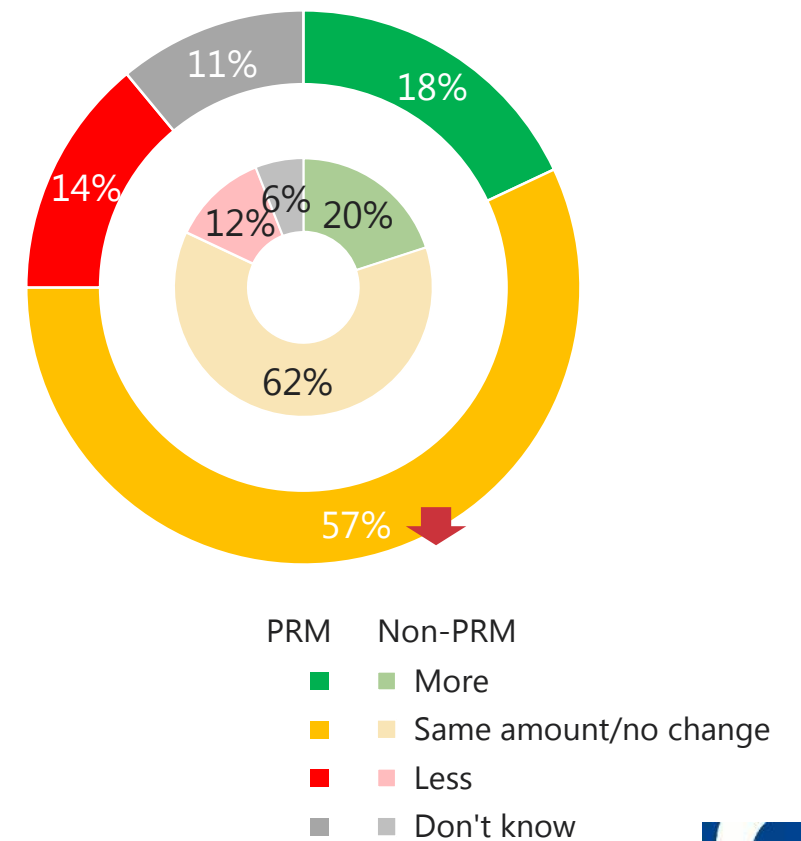
Flying behaviour: Those with disabilities

Those with non-physical disabilities are more likely than PRM overall to have never flown. PRM that need assistance and either have non-physical or non-hidden disabilities are less likely than PRM to have flown in the past year than PRM overall.

Last flown from UK airport

	Within last 12 months	1 - 3 years ago	4 - 10 years ago	10+ years ago	Never flown
PRM	30%	17%	21%	20%	10%
Physical	30%	16%	24% ⬆	22% ⬆	7% ⬇
Non-physical	26%	16%	22%	18%	16% ⬆
Physical & require assistance	26%	15%	26%	25% ⬆	7%
Non-physical & need assistance	18% ⬇	11%	24%	20%	22% ⬆
Hidden	31%	16%	22%	20%	10%
Non-hidden	26%	16%	23%	24%	9%
Hidden & require assistance	25%	12%	25%	24%	11%
Non-hidden & need assistance	23% ⬇	14%	27% ⬆	25%	8%

⬆ ⬇ = significant difference v PRM

PRM: Flying behaviour overview

A quarter of PRM cite health as a barrier to flying. Of these, around half have air travel difficulties and require assistance with flying

air travel difficult, highlighting the challenge among some PRM.

Barriers to flying
(Mentions above 2%)

Barrier	Non-PRM	PRM
Budget constraints/the cost of travel	43%	40%
Health or disability reasons - flight difficulties	2%	29%
Health or disability reasons - airport difficulties	1%	27%
Not made any trips where flying would be an option	31%	26%
Fear of flying	7%	14%
Prefer another mode of transport (e.g. car, boat or train)	9%	8%
Dislike airports/the flight experience	8%	7%
Getting to the airport is difficult	3%	5%
Flying is difficult due to other reasons	9%	4%
Don't have the time to travel	7%	3%
Bad previous experience has put me off	2%	3%
Concerns about the environment/carbon footprint	3%	3%
Don't know/difficult to say	5%	3%

36% of PRM mention health/ disability, consistent with previous waves.

21% of PRM with a non-physical disability indicate that a fear of flying is a barrier.

61% of PRM who need assistance with flying, 54% with air travel difficulties and 49% of those with non-hidden disabilities identify health as a reason they have not travelled by air in the last year.

■ Non-PRM
■ PRM

⬆ ⬇ = significant difference v non-PRM

Q20. Why have you not flown? Base : All who have not flown in the last 12 months. Non-PRM (1,158), PRM (453).

PRM: Barriers to Flying by segment

Barriers to flying (Mentions by PRM above 4%)

Significant difference vs non-PRM
- ⬭ Significantly higher than non-PRM
- ⬭ Significantly lower than non-PRM

	PRM	Physical	Non physical	Physical disability require assistance	Non physical disability require assistance*	Hidden	Non hidden	Hidden disability require assistance*	Non hidden disability require assistance*
Budget/costs	40%	40%	43%	35%	37%	45%	33%	40%	33%
Health/disability - flight difficulties	29%	33%	25%	57%	48%	29%	40%	56%	57%
Health/disability - airport difficulties	27%	33%	24%	55%	46%	27%	39%	51%	55%
Made no trips where flying an option	26%	28%	26%	23%	21%	28%	26%	24%	24%
Fear of flying	14%	12%	21%	8%	14%	17%	12%	13%	9%
Prefer other mode of transport	8%	8%	8%	9%	6%	8%	8%	8%	7%
Dislike airports/flight experience	7%	7%	7%	6%	3%	8%	5%	7%	4%
Getting to the airport is difficult	5%	5%	6%	7%	3%	6%	5%	8%	7%
Flying is difficult due to other reasons	4%	3%	7%	5%	6%	4%	3%	5%	4%

Familiarity with assistance

Travellers who have requested assistance previously appear to be less satisfied with their experience than first time users, although this difference is not statistically significant.

Was this the first time you had requested assistance?

Yes, first time user — 42%

No, used for the first time within the last three years — 35%

No, used for the first time more than three years ago — 23%

Don't know — 4%
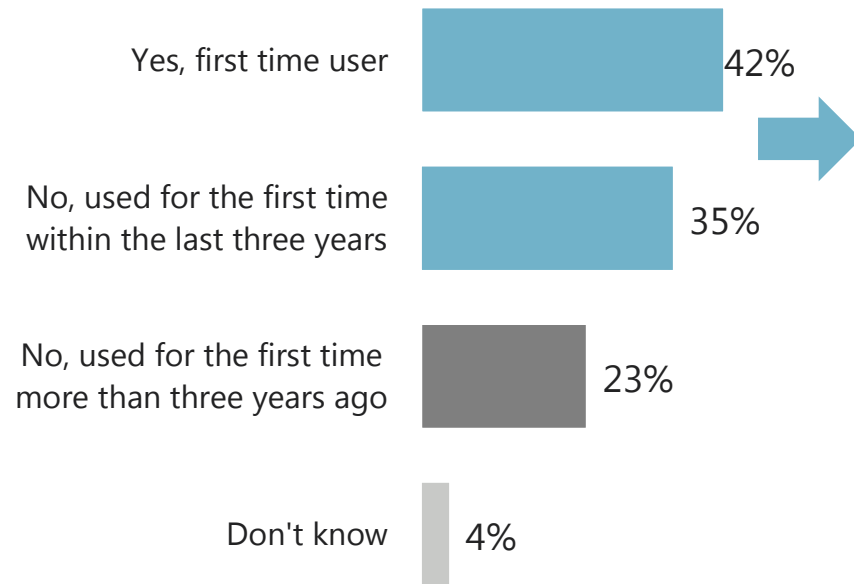
What prompted request for those first using within the last 3 years*

First time I had needed assistance, but I had flown before — 49%

I was not aware assistance was available before — 22%

First time able or confident enough to request — 9%

First time I had flown — 4%

Other — 8%
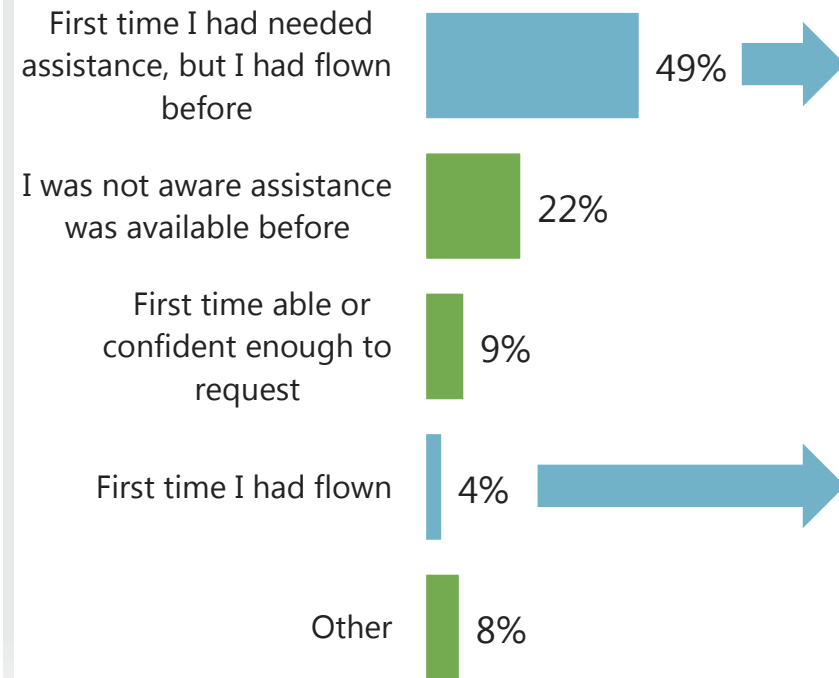
Why needed assistance but hadn't before*
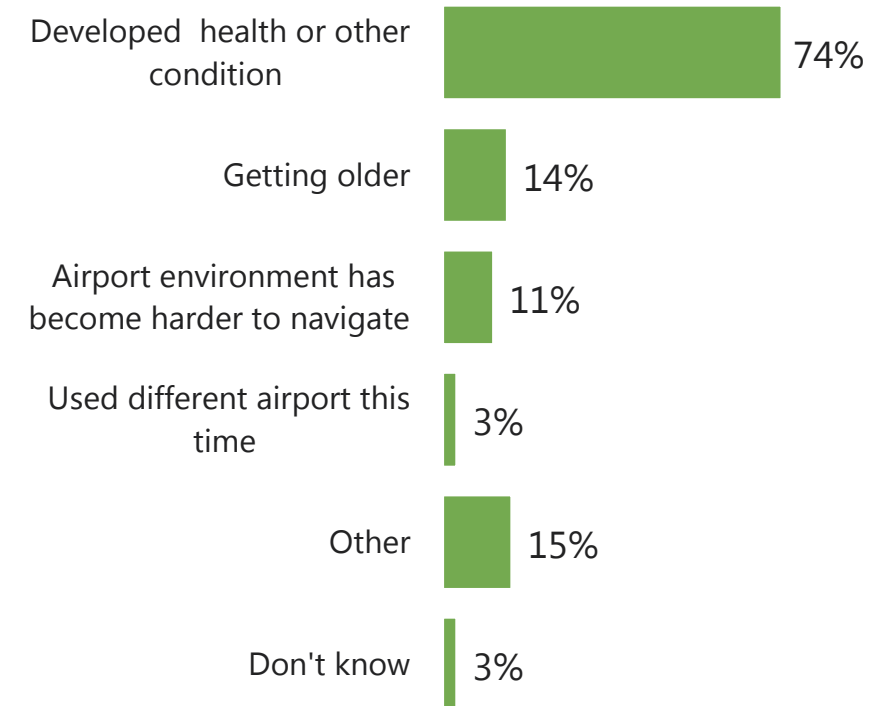
Developed health or other condition — 74%

Getting older — 14%

Airport environment has become harder to navigate — 11%

Used different airport this time — 3%

Other — 15%

Don't know — 3%

* CAUTION LOW BASE

Awareness of assistance available

Awareness of assistance available is much higher amongst frequent flyers than overall. Just under one in five PRM do not know who they need to inform to require assistance.

To what extent are you aware of the special assistance available?

Fully aware
- 20% %age aware
- 39% Flown in the last 3 months
- 43% Flown in the last 6 months
- 40% Flown in the last 12 months

Aware but not in detail
- 31% %age aware
- 36% Flown in the last 3 months
- 35% Flown in the last 6 months
- 35% Flown in the last 12 months

Heard of, but know nothing about
- 24% %age aware
- 21% Flown in the last 3 months
- 17% Flown in the last 6 months
- 19% Flown in the last 12 months

Not heard of special assistance
- 21% %age aware
- 2% Flown in the last 3 months
- 3% Flown in the last 6 months
- 4% Flown in the last 12 months

Don't know
- 3% %age aware
- 2% Flown in the last 3 months
- 2% Flown in the last 6 months
- 1% Flown in the last 12 months

■ %age aware ■ Flown in the last 3 months ■ Flown in the last 6 months ■ Flown in the last 12 months

Who do you need to inform?

Airport
- 51% Need to inform
- 49% Do not need to inform

Airline
- 65% Need to inform
- 35% Do not need to inform

Holiday Company
- 52% Need to inform
- 48% Do not need to inform

2% select 'None of these', whilst **17%** do not know.

■ Need to inform ■ Do not need to inform

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Civil Aviation Authority

Satisfaction with assistance received

Satisfaction levels are relatively high, but with scope for improvement.

6% of those who flew in the last 12 months required assistance for themselves or a member of their party.

How assistance was requested?
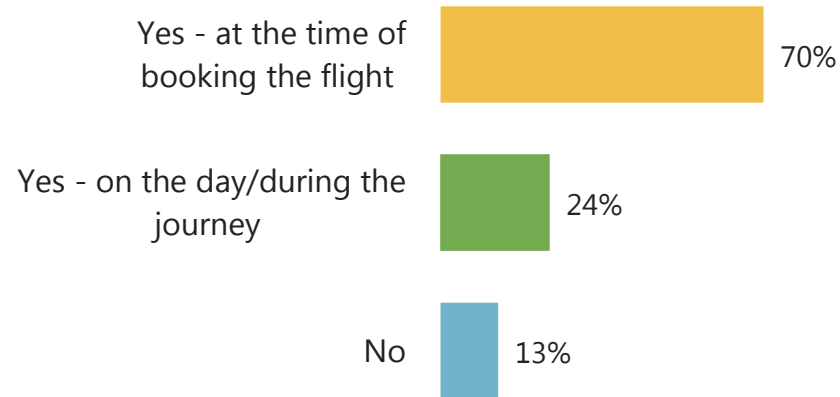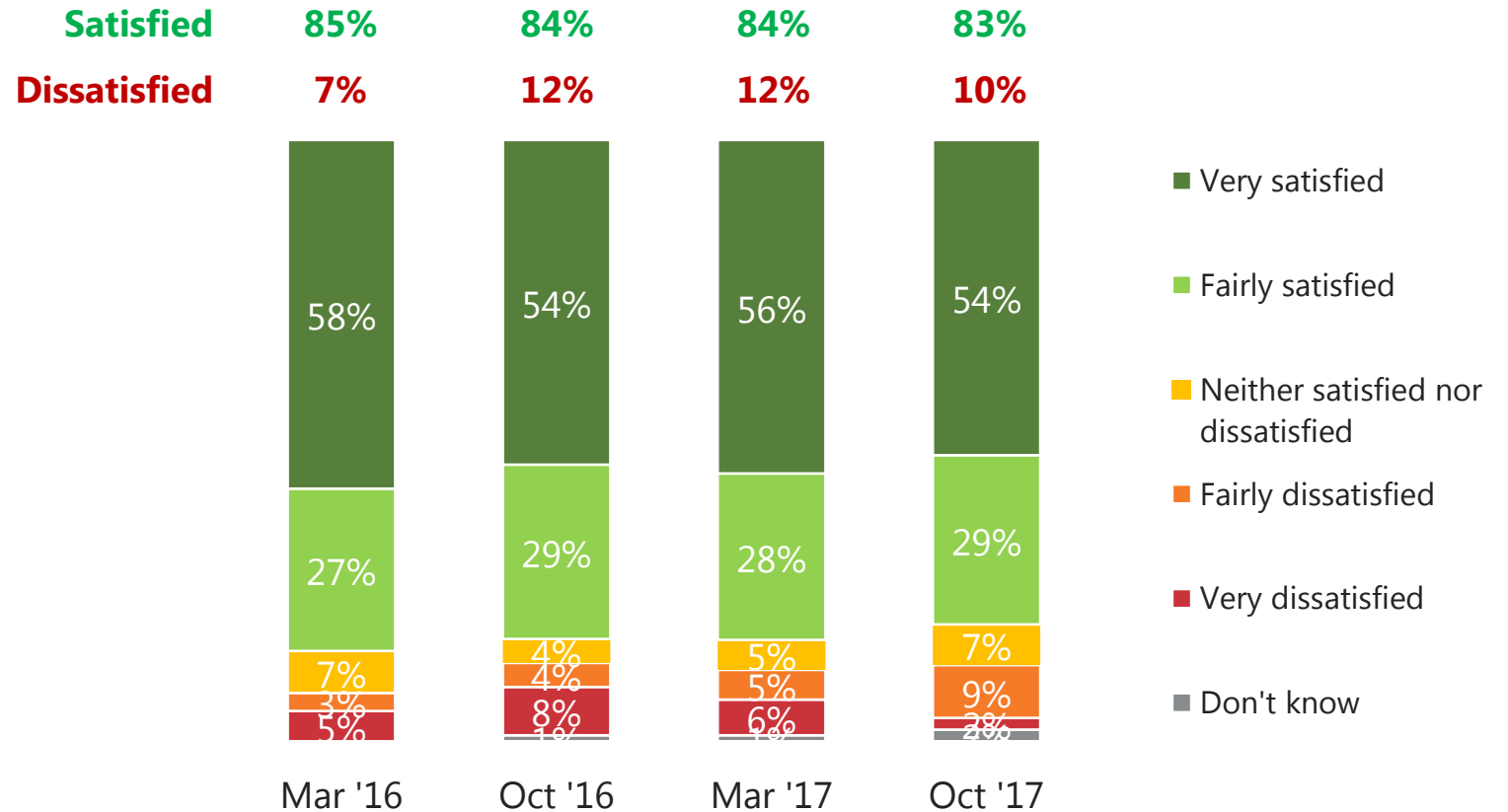
- Yes - at the time of booking the flight — 70%
- Yes - on the day/during the journey — 24%
- No — 13%

Overall satisfaction with assistance received

	Mar '16	Oct '16	Mar '17	Oct '17
Satisfied	**85%**	**84%**	**84%**	**83%**
Dissatisfied	**7%**	**12%**	**12%**	**10%**

Bar chart values:

	Mar '16	Oct '16	Mar '17	Oct '17
Very satisfied	58%	54%	56%	54%
Fairly satisfied	27%	29%	28%	29%
Neither satisfied nor dissatisfied	7%	4%	5%	7%
Fairly dissatisfied	3%	4%	5%	9%
Very dissatisfied	5%	8%	6%	2%
Don't know		1%		

Legend:
- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied
- Don't know

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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.

Satisfied	88%	83%	79%	85%	75%	71%	81%	79%

When prebooking the assistance (i.e. before travelling to the airport)
- 61%
- 27%
- 8%
- 2%
- 2%

At the UK departure airport
- 51%
- 32%
- 10%
- 4%
- 3%

During the flight on your outbound and/or return journey
- 45%
- 34%
- 13%
- 5%
- 3%

At your destination airport
- 56%
- 30%
- 8%
- 3%
- 3%

With seating on-board the aircraft
- 43%
- 32%
- 14%
- 3%
- 8%

Carriage of any special items (e.g. medicine, mobility aids)
- 45%
- 26%
- 20%
- 2%
- 7%

At the departure airport on your return journey
- 53%
- 28%
- 10%
- 5%
- 4%

At the arrival airport back in the UK
- 50%
- 30%
- 10%
- 4%
- 6%

Legend:
- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Fairly dissatisfied
- Very dissatisfied

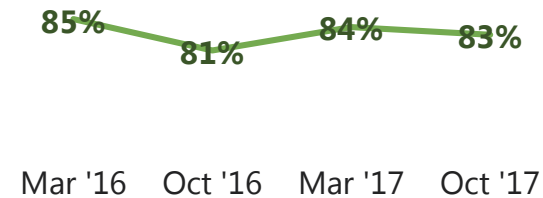Ipsos Loyalty

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Satisfaction with assistance at each point in the journey

Satisfaction with assistance at the departure and destination airports have increased since Spring 2016, albeit not significantly due to fairly low base sizes. Satisfaction with seating on-board and carriage of special items has decreased.

When pre-booking assistance
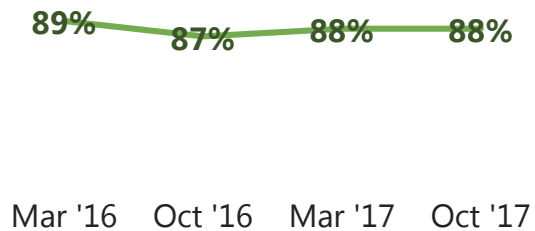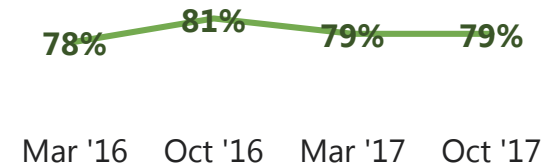
89% 87% 88% 88%

Mar '16   Oct '16   Mar '17   Oct '17

At UK departure airport

85% 81% 84% 83%

Mar '16   Oct '16   Mar '17   Oct '17

During flight

78% 81% 79% 79%

Mar '16   Oct '16   Mar '17   Oct '17

At destination airport

79% 79% 77% 85%

Mar '16   Oct '16   Mar '17   Oct '17

Seating on-board

79% 79% 75%

Mar '16   Oct '16   Mar '17   Oct '17

Carriage of any special items

72% 78% 80% 71%

Mar '16   Oct '16   Mar '17   Oct '17
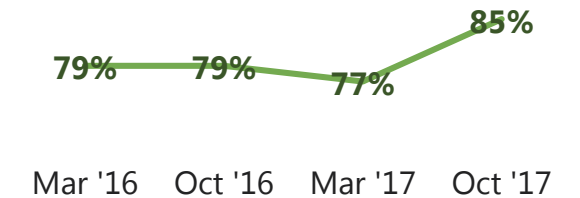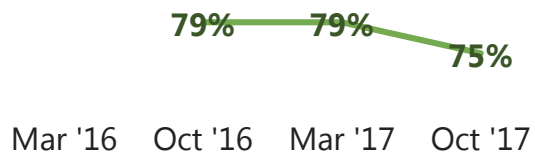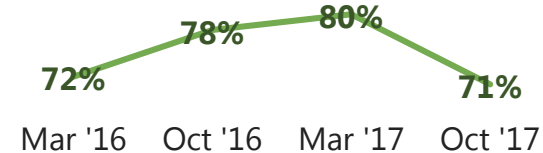
Departure airport on return journey

79% 72% 73% 81%

Mar '16   Oct '16   Mar '17   Oct '17

At arrival airport back in UK

77% 74% 78% 79%

Mar '16   Oct '16   Mar '17   Oct '17
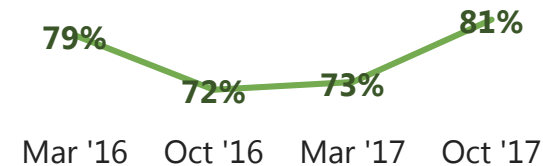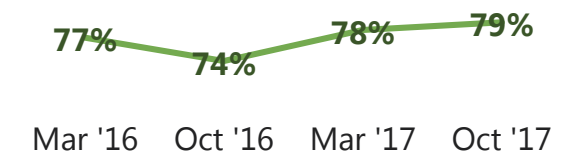
CAUTION: LOW BASES

PRM: Differences compared to non-PRM

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

Percentage satisfied/dissatisfied with each statement

= significant difference v non-PRM

Satisfied
- PRM (dark green)
- Non-PRM (light green)

Dissatisfied
- PRM (red)
- Non-PRM (pink)

	UK airport experience	Security at UK airport	Ease of finding way around UK airport	Finding way to gate
Satisfied PRM	72%	78%	80%	84%
Satisfied Non-PRM	79%	84%	87%	89%
Dissatisfied PRM	11%	5%	5%	3%
Dissatisfied Non-PRM	10%	6%	3%	3%

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: 200, non-PRM: 1,648).
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 exc. DK, (PRM: 198, non-PRM: 1,648)

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Understanding dissatisfaction with the assistance

Disorganised and inadequate assistance is frequently mentioned in relation to dissatisfaction.

The assistance at the airport was disorganised, one member being quite rude.

They took forever to deal with it and then the person assisting didn't have security clearance to go through the departures. I didn't even have time to stop for food and drink.

Although I had arranged assistance, I had to wait a long time for it to arrive

When we are collected from the aircraft in UK we are wheelchaired to a bunch of seats and then made to wait for all the other disabled passengers to come along and fill a buggy. I travel business class and sometimes have to wait more than half an hour for a ride to baggage claim. I find this unacceptable.

There have been regular problems recently on several occasions with the non-provision or extremely late provision of the lift and/or assistance to get on or off the plane, even though I had booked in advance. This has happened both in UK and abroad. I have had to wait up to 80 minutes for this to be provided. Airline blames airport and vice versa.

Waited too long to progress and left by the handler for over two hours.

The person was last on and was pushed in the wheelchair by a companion – no proper assistance was provided in the UK. The assistance area at Stanstead, was along way from the airline check in desk.

PRM expectations for future travel

PRM feel less optimistic about their future travel than in previous waves. Those aged 55-64 are the age group most positive about future travel, and those aged 18-24 are the age group least positive.

■ Net Agree ■ Net Disagree

Opportunity to ask for assistance

57% — 66% — 63% — 56%

19% — 18% — 16% — 19%

Mar '16   Oct '16   Mar '17   Oct '17

Information about assistance

53% — 60% — 52% — 52%

24% — 19% — 19% — 20%

Mar '16   Oct '16   Mar '17   Oct '17

Needs understood and passed on to airport

54% — 59% — 55% — 52%

23% — 20% — 17% — 21%

Mar '16   Oct '16   Mar '17   Oct '17

Assistance give during journey

56% — 63% — 58% — 52%

18% — 18% — 15% — 18%

Mar '16   Oct '16   Mar '17   Oct '17

Treated with dignity and respect

63% — 67% — 67% — 60%

12% — 13% — 10% — 13%

Mar '16   Oct '16   Mar '17   Oct '17
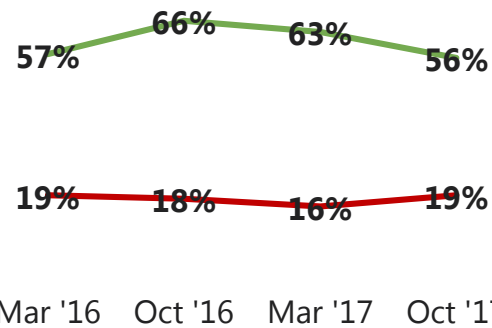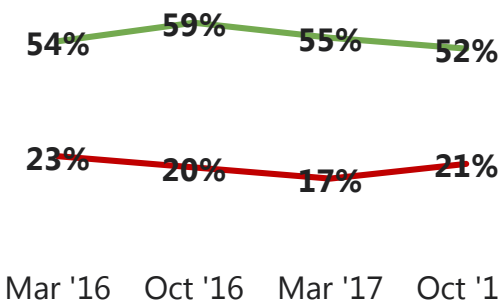
	Opportunity to ask for assistance	Information about assistance	Needs understood and passed on	Assistance given during journey	Treated with dignity and respect
Net agreement amongst those aged 55-64	61%	61%	62%	53%	70%
Net agreement amongst those aged 18-24	45%	44%	54%	48%	62%

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 (348-370); PRM and flown in last 10 years aged 55-64, excl. DKs (53-59).

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PRM with physical and non-physical disabilities

There are no statistically significant differences between the PRM sub-groups. However, PRM requiring assistance are most positive about future assistance, whilst non- physical PRM's feel the least positive, particularly in regard to asking for assistance when making a booking.

Percentage agreeing with each statement
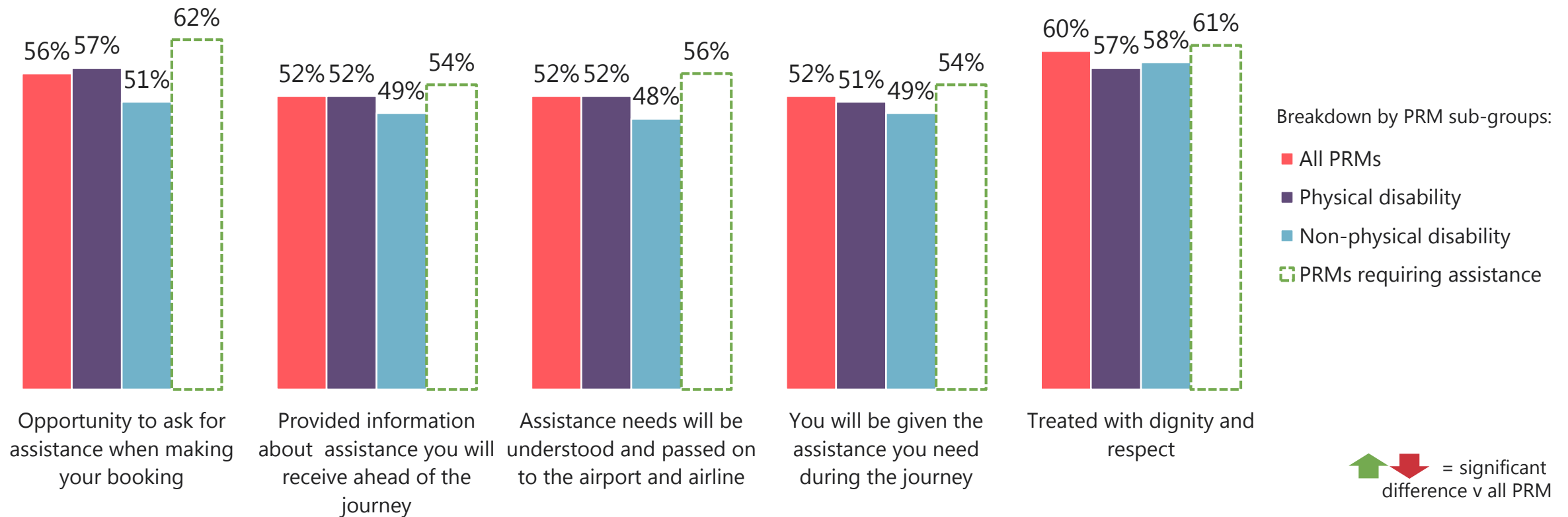
Opportunity to ask for assistance when making your booking
56% 57% 51% 62%

Provided information about assistance you will receive ahead of the journey
52% 52% 49% 54%

Assistance needs will be understood and passed on to the airport and airline
52% 52% 48% 56%

You will be given the assistance you need during the journey
52% 51% 49% 54%

Treated with dignity and respect
60% 57% 58% 61%

Breakdown by PRM sub-groups:
■ All PRMs
■ Physical disability
■ Non-physical disability
⊡ PRMs requiring assistance

⬆⬇ = significant difference v all PRM

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 (348-370); PRM with physical disability, excl. DKs (265-279); PRM with non-physical disability, excl. DKs (133-146); PRM requiring assistance, excl. DKs (123-133).

PRM with recent flight experience

Recent flying experience does not have a significant impact on the attitudes of PRM passengers to future expectations of flying. However, PRM passengers who have flown more recently (within the last year) are more optimistic that their assistance needs will be catered for during future flights

Percentage agreeing with each statement

Breakdown by PRM sub-groups:
- All PRMs
- Flown in last 12 months
- Flown 1-3 years ago
- Flown 4-10 years ago

Opportunity to ask for assistance when making your booking	Provided information about assistance you will receive ahead of the journey	Assistance needs will be understood and passed on to the airport and airline	You will be given the assistance you need during the journey	Treated with dignity and respect
56% / 62% / 52% / 49%	52% / 59% / 42% / 49%	52% / 54% / 46% / 55%	52% / 57% / 43% / 53%	60% / 64% / 57% / 58%

= significant difference compared to All PRM

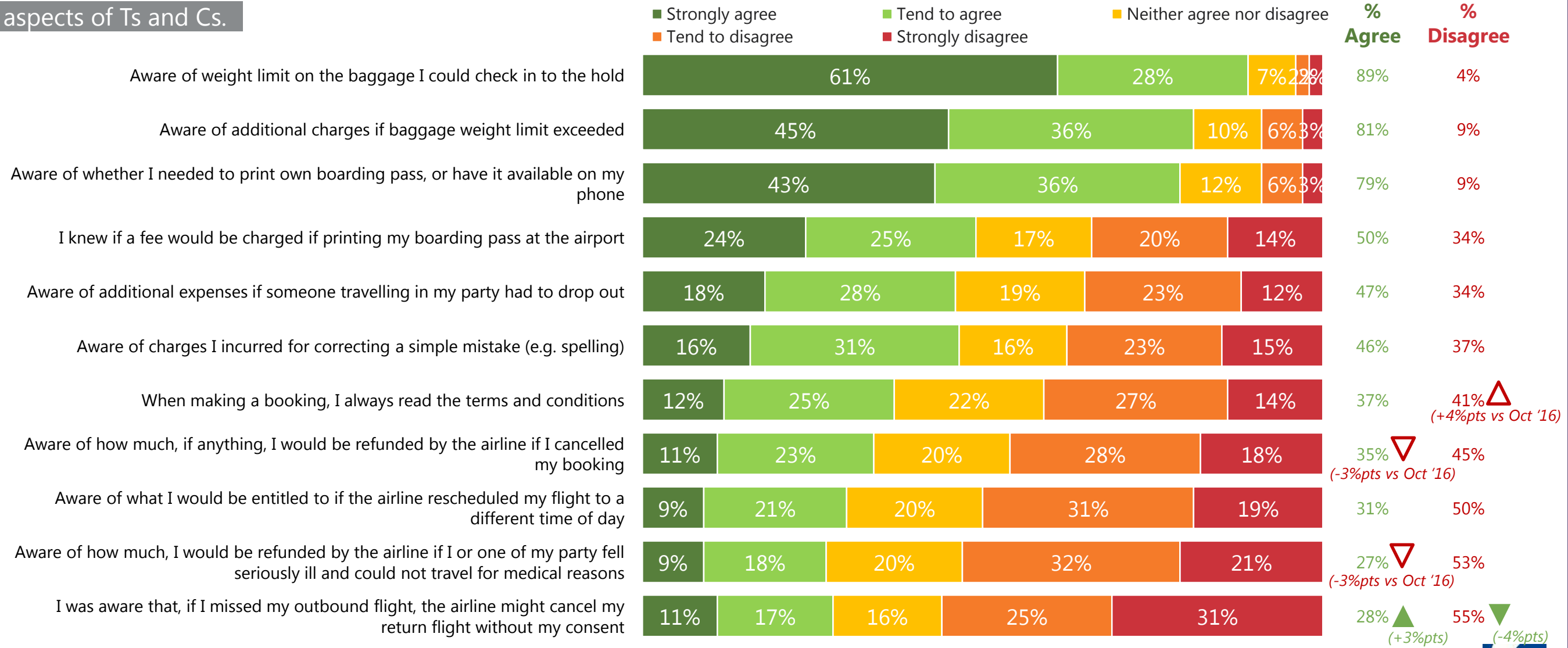Ipsos Loyalty

Civil Aviation Authority

Flight terms and conditions

Awareness of terms and conditions

Just over a third read the terms and conditions when booking a flight, while 45% do not, reflecting the mixed levels of awareness of different aspects of Ts and Cs.
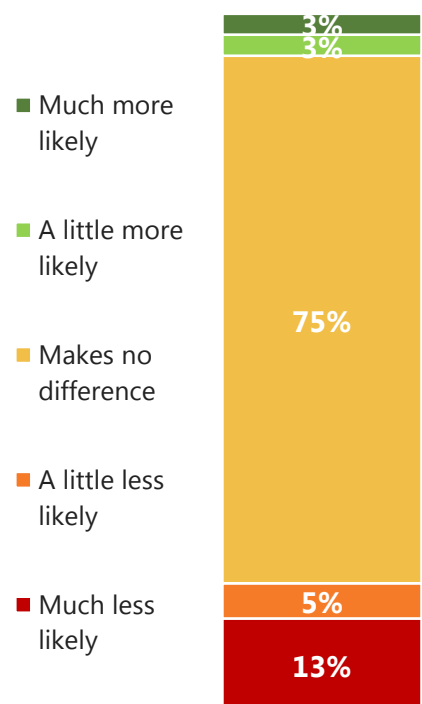
Legend:
- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree

Statement	Strongly agree	Tend to agree	Neither agree nor disagree	Tend to disagree	Strongly disagree	% Agree	% Disagree
Aware of weight limit on the baggage I could check in to the hold	61%	28%	7%	2%	2%	89%	4%
Aware of additional charges if baggage weight limit exceeded	45%	36%	10%	6%	3%	81%	9%
Aware of whether I needed to print own boarding pass, or have it available on my phone	43%	36%	12%	6%	3%	79%	9%
I knew if a fee would be charged if printing my boarding pass at the airport	24%	25%	17%	20%	14%	50%	34%
Aware of additional expenses if someone travelling in my party had to drop out	18%	28%	19%	23%	12%	47%	34%
Aware of charges I incurred for correcting a simple mistake (e.g. spelling)	16%	31%	16%	23%	15%	46%	37%
When making a booking, I always read the terms and conditions	12%	25%	22%	27%	14%	37%	41% △ (+4%pts vs Oct '16)
Aware of how much, if anything, I would be refunded by the airline if I cancelled my booking	11%	23%	20%	28%	18%	35% ▽ (-3%pts vs Oct '16)	45%
Aware of what I would be entitled to if the airline rescheduled my flight to a different time of day	9%	21%	20%	31%	19%	31%	50%
Aware of how much, I would be refunded by the airline if I or one of my party fell seriously ill and could not travel for medical reasons	9%	18%	20%	32%	21%	27% ▽ (-3%pts vs Oct '16)	53%
I was aware that, if I missed my outbound flight, the airline might cancel my return flight without my consent	11%	17%	16%	25%	31%	28% ▲ (+3%pts)	55% ▼ (-4%pts)

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 exc. DK (2227-2427)
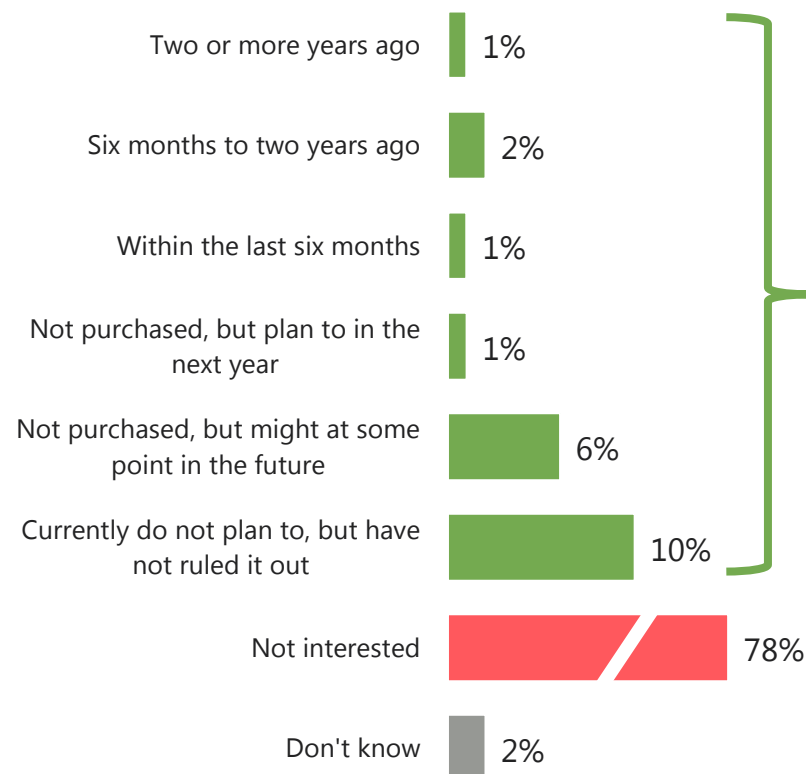
Civil Aviation Authority

Drones

Drones

The majority are not interested in purchasing a drone and government regulation would have little impact on their likelihood to purchase a drone. Among those who own or may purchase a drone, slightly more support government bodies requesting data.

## Would government regulation impact your likelihood to buy/use a drone?

Category	%
Much more likely	3%
A little more likely	3%
Makes no difference	75%
A little less likely	5%
Much less likely	13%

Have you ever purchased a drone, or considered buying one?

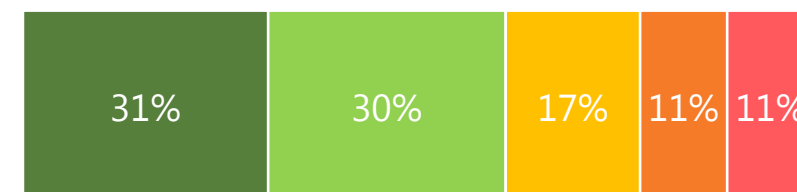| Category	%
Two or more years ago	1%
Six months to two years ago	2%
Within the last six months	1%
Not purchased, but plan to in the next year	1%
Not purchased, but might at some point in the future	6%
Currently do not plan to, but have not ruled it out	10%
Not interested	78%
Don't know	2%

How strongly do you agree or disagree with the following statements?

I would be happy for government bodies to be able to request data about my drone only if I broke the rules when flying it
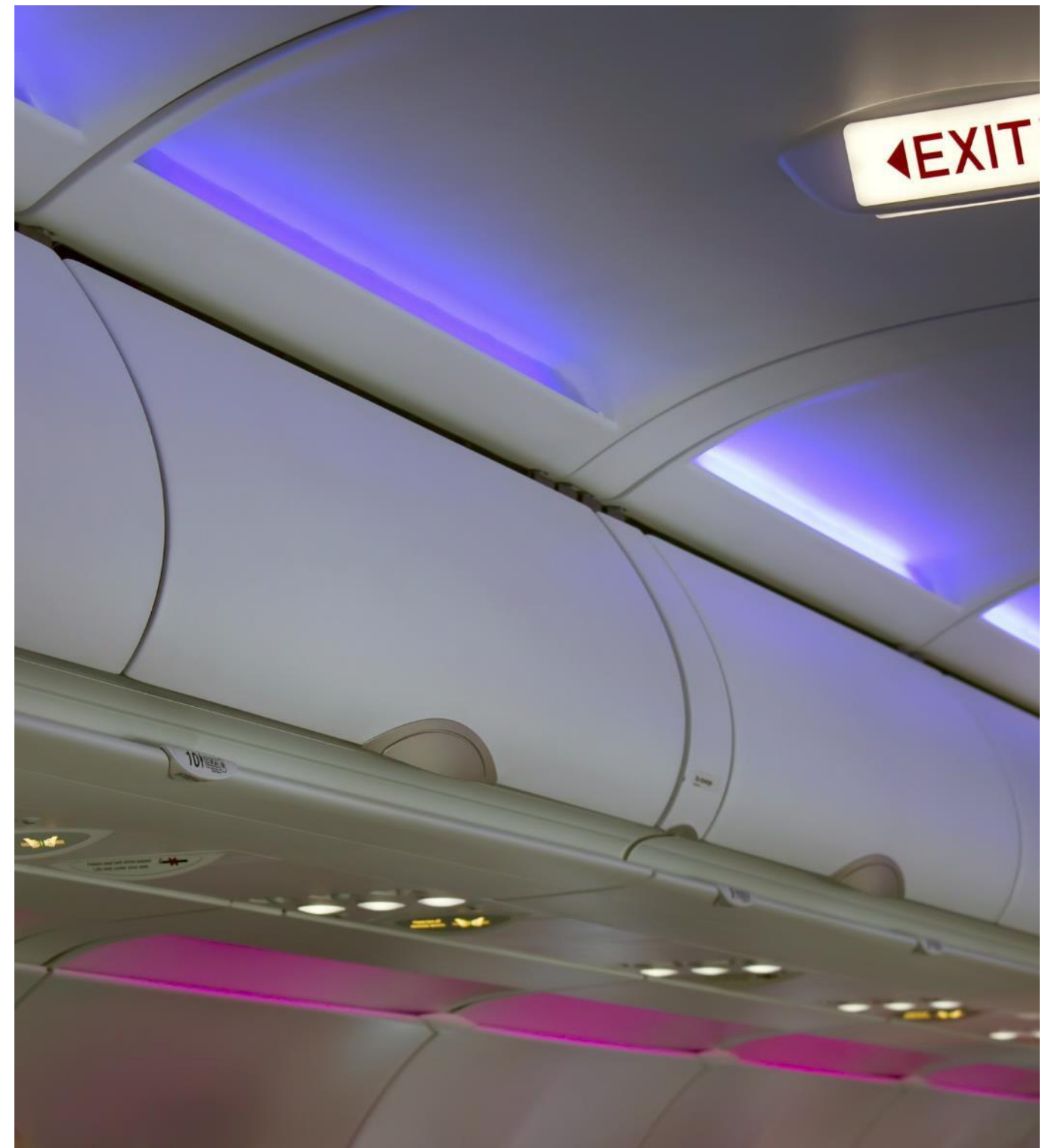
Strongly agree	Tend to agree	Neither agree or disagree	Tend to disagree	Strongly disagree
39%	40%	14%	4%	5%
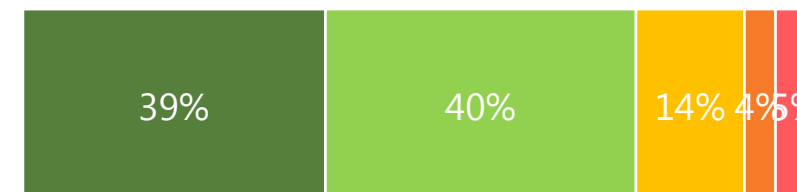
I would be happy for government bodies to be able to track my drone

Strongly agree	Tend to agree	Neither agree or disagree	Tend to disagree	Strongly disagree
31%	30%	17%	11%	11%

■ Strongly agree ■ Tend to agree ■ Neither agree or disagree ■ Tend to disagree ■ Strongly disagree

Ipsos Loyalty

Civil Aviation Authority

Appendix

Ipsos Loyalty

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.

Ipsos Loyalty

Thank you.

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