# Civil Aviation Authority

# Consumer Tracker for the Aviation Sector

## Wave Three, Report: July 2017



Ipsos Loyalty

# Contents



Ipsos Loyalty

# Background to the research

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

The main objectives of this research are to:

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

Ipsos Loyalty

Civil Aviation Authority

# 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 3,502 interviews were conducted with a nationally representative sample between 6th March and 27th March 2017.  3,002 interviews were conducted online and 500 were conducted over the telephone.
- This mixed methodology approach was adopted to make the survey as inclusive as possible.  Conducting the survey by telephone meant it was possible to capture those that are not online and conducting an online survey enabled us to interview certain groups that tend to be more difficult to reach by telephone (e.g. younger males).
- For the online interviews, participants were recruited from Ipsos' online panel.  For the telephone interviews, these were predominantly conducted through a random digit dialling approach, but some targeted sample was also included.
- To ensure the sample was nationally representative, interview quotas were set to reflect the UK adult population in terms of gender, age, region and working status.  Where the final number of interviews did not exactly match quotas, weighting was then applied to the final data according to these criteria.
- The questionnaire was designed to average 12 minutes online and 15 minutes by telephone.  To keep the telephone interview length to a minimum, some questions were only asked on the online survey and not the telephone survey.  This is highlighted in this report where this is the case.
- This research has been conducted in accordance with Ipsos MORI's standards and accreditations (see the appendix to this report).

Ipsos Loyalty

Civil Aviation Authority

# 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 second wave (October 2016). △ ▽ Hollow arrows indicate a year-on-year significant difference, between March 2016 and March 2017.
- Alternate arrows show a result that is significantly higher ⬆ or lower ⬇ than a specified subgroup.

Ipsos Loyalty

Civil Aviation Authority

# Weighting scheme

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

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

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

Ipsos Loyalty

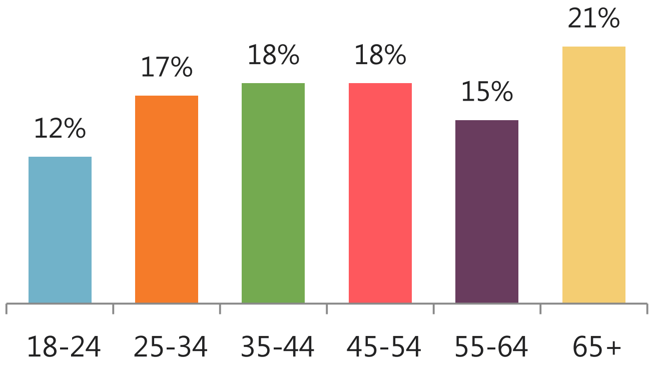
Civil Aviation Authority

# Demographic (weighted) sample profile

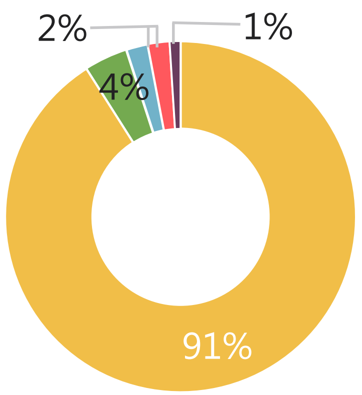
## Gender

49% 51%

## Age

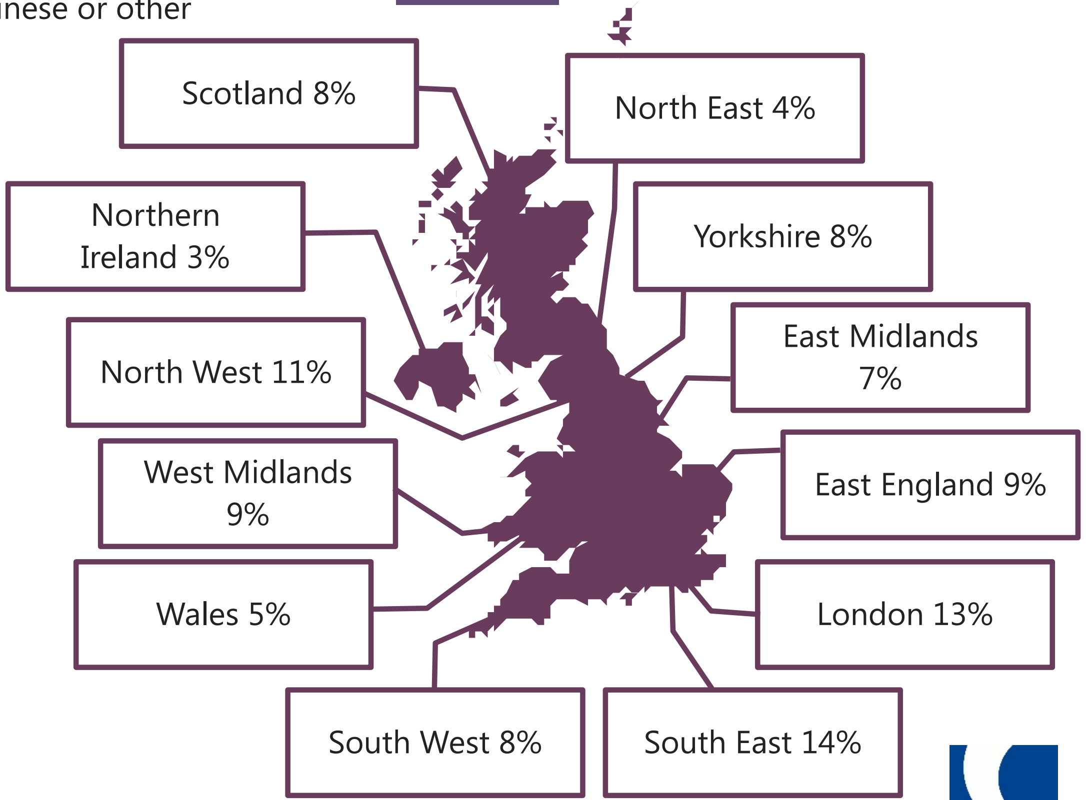



## Ethnicity




91% of those interviewed by phone have internet access

## Regions




## Working Status

| | |
|---|---|
| Employed full time (30+ hours per week) | 41% |
| Employed part time (8-29 hours per week) | 15% |
| Employed part time (under 8 hours per week) | 2% |
| Not working | 8% |
| Retired | 21% |
| Housewife/househusband | 6% |
| Student/full time education | 6% |

## Household Income

| | |
|---|---|
| Up to £14,999 | 14% |
| £15,000-24,499 | 17% |
| £25,000-39,999 | 25% |
| £40,000-74,999 | 21% |
| £75,000 or more | 9% |

Ipsos Loyalty

Q1. Gender, Q2. Age, Q3. Working status, Q4. Region, Q130. Ethnicity, Q131. Household income, Base: all participants (3502), Q132. Do you have internet at home? Base: all telephone participants (500)

Civil Aviation Authority

# Executive Summary

Ipsos Loyalty

# Executive summary: headlines

The air travel behaviour of UK consumers remains consistent with previous waves of this research; over half (54%) have flown in the past 12 months and 5% have never flown. Most flights are taken for holiday purposes (87%). The biggest barrier to flying is consistently budget/cost constraints (41% of those that haven't travelled in the past 12 months).

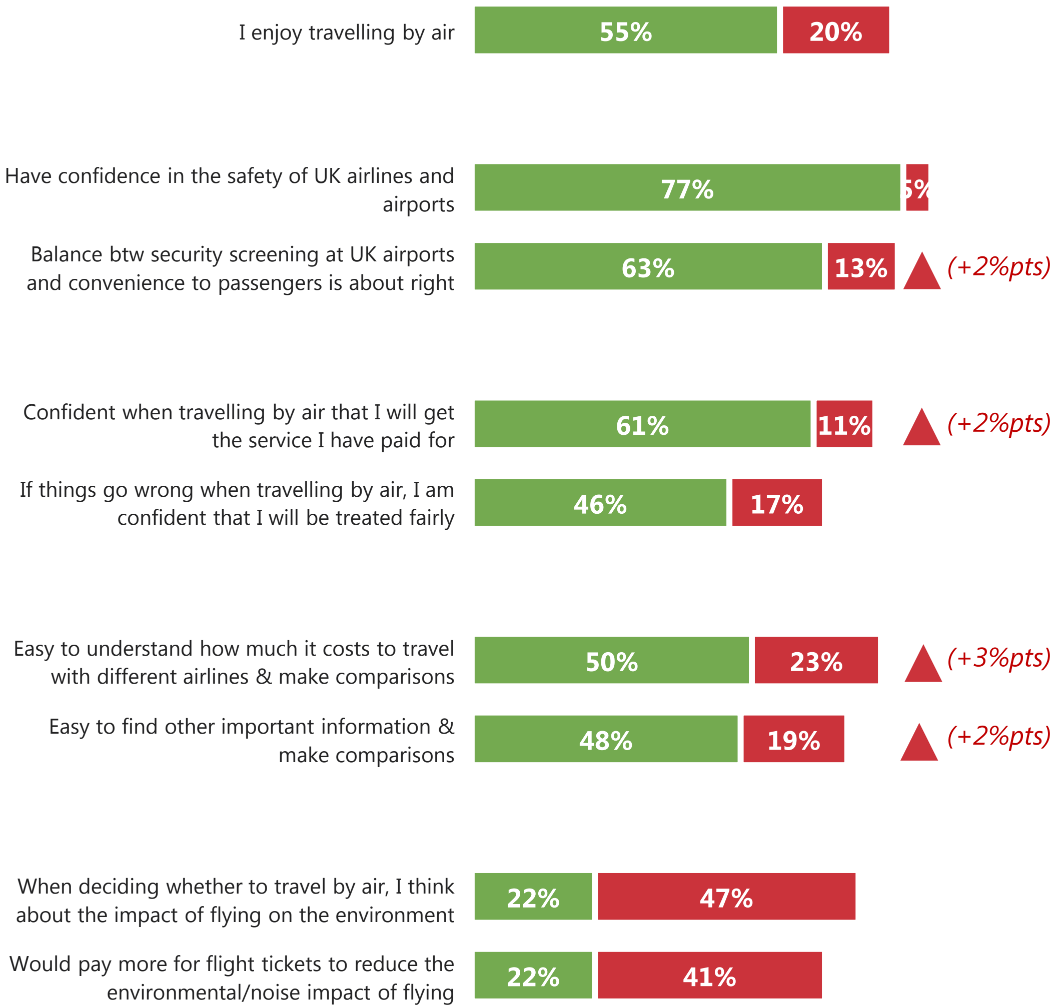
**Enjoyment** While consistently over half of UK consumers enjoy travelling by air (55% in wave 3), there remains some polarisation of views with a quarter (25%) strongly agreeing and a fifth (20%) disagreeing. Those with recent flying experience are more likely to agree than those who have not flown recently. PRM who need assistance when flying (25%) are more likely than average to disagree, and this disagreement increases further when PRM who need assistance flying also have non-physical disabilities (33%) or hidden disabilities (27%).

**Security & Safety** Confidence in the safety of UK airlines and airports is consistently the highest rated headline measure, with three-quarters (77%) agreeing. Despite a significant increase in disagreement, still almost two-thirds (63%) agree that the balance between security screening and passenger convenience at UK airports is about right. Where there is disagreement, UK consumers are more likely to say there is too much focus on security.

**Consumer Confidence** Consumers are still generally confident they will get the service they have paid for (61% agree, 11% disagree), but there is less confidence in fair treatment in the event of a problem (46% agree, 17% disagree). When disruption was experienced on the last flight, disagreement is increased (21% and 31%, respectively.

**Consumer Choice** Around half of respondents continue to agree that it is easy to understand and make price comparisons. There have been small but significant increases among those disagreeing. PRM are less likely to agree with both statements than non-PRM.

**Environment** Consideration of the environment remain the lowest rated headline measures, with around a fifth thinking about the impact or willing to pay more to reduce it (22% for each measure). 18-24 year olds show the greatest concern for the environment and those age 65+ the least.



# Travel experience

Seasonal trends in the flying patterns of UK consumers are confirmed, but a small number of airports and airlines make up the majority of recent flying experiences. Whilst overall satisfaction remains high, there is a slight but significant decline since March 2016, accompanied with a fall in ratings of airport experience and airport security.

**Overall**

- Overall satisfaction with the most recent travel experience is high (87%) but has fallen year-on-year.
- Satisfaction across all measured touchpoints is largely consistent with previous findings, with just a few important exceptions that appear to be impacting on overall satisfaction.

**Airport Experience**

- As with the overall satisfaction metric, there is a significant fall in the year-on-year ratings of the airport experience in the UK.
- Examining the airport experience in more detail, several ratings of several touchpoints have fallen. In particular, ratings of airport security shows a significant drop since October 2016, while ratings of passport control; shops, restaurants and services and transfers and connections also show directional rather than statistically significant declines.

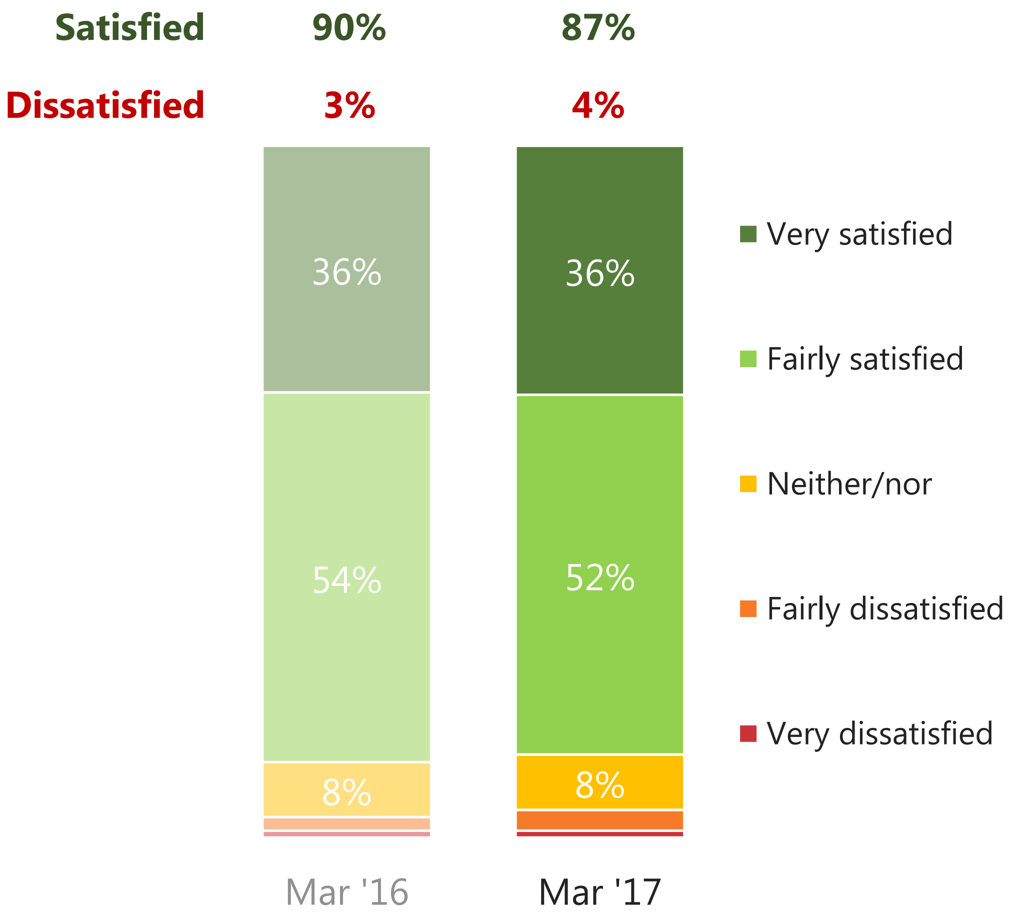
**Airport Choice**

- Satisfaction with choice between airports has dropped, having been rated more highly in October 2016. Satisfaction is lowest in the North East and South West of England.

| | Satisfied | Dis-satisfied |
|---|---|---|
| Process of booking the flight | 88% | 4% |
| Finding way to gate | 88% | 4% |
| Ease of finding way around airport in UK | 88% | 5% |
| Information about flight status at the UK airport | 86% | 5% |
| Deciding which flight to book | 86% | 4% |
| Travelling to/from airport in UK | 83% | 7% |
| Check-in and bag drop at airport in the UK | 83% | 5% |
| Baggage collection at the airport in the UK | 82% | 8% |
| Security at the airport in the UK | 82% | 6% |
| Passport/immigration control in the UK | 80% | 8% |
| Overall airport experience | 79% | 9% |
| Overall on-board and in-flight experience | 78% | 7% |
| Ease of finding information to compare choices | 78% | 5% |
| Shop, restaurants & services at UK airport | 76% | 9% |
| Transfer/connection to another flight | 74% | 6% |
| Value for money | 76% | 8% |
| Amount of choice btw UK departure airports | 66% | 12% |
| Amount of choice between airlines | 64% | 12% |
| Handling of any complaints | 50% | 15% |

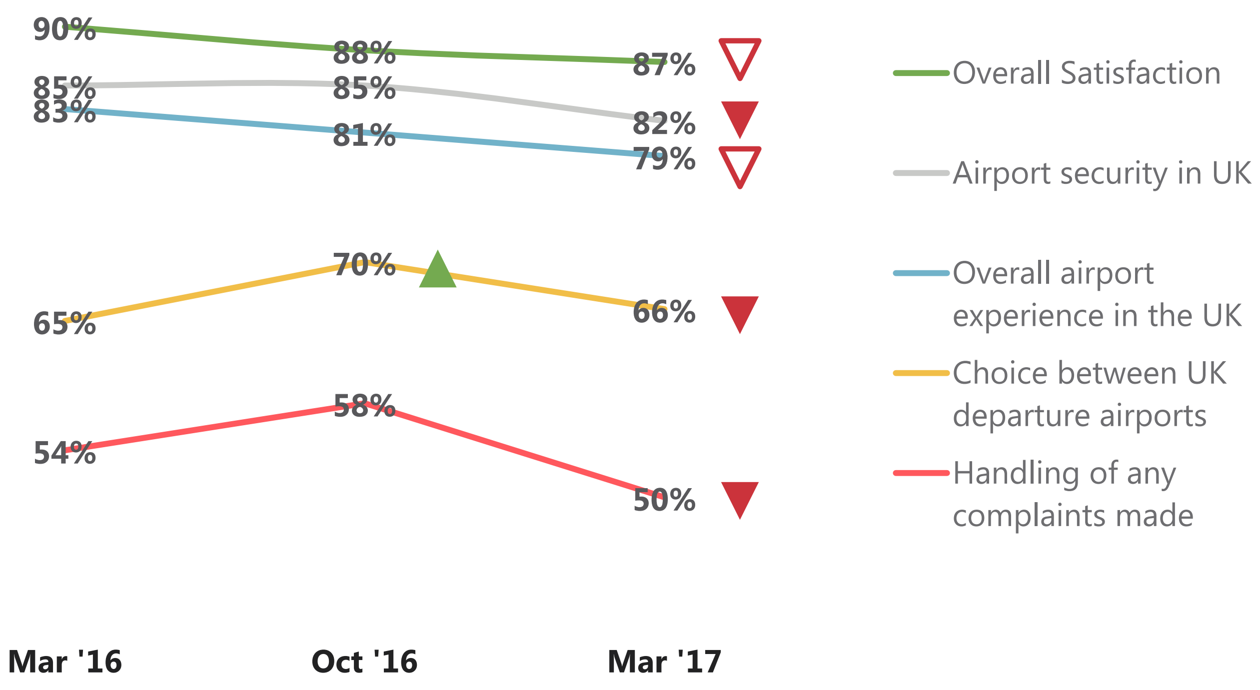
# Significant changes – travel experience

Overall satisfaction has fallen year-on-year, and a number of touchpoints appear to be pulling this figure down.




Overall satisfaction with travel experience

Satisfaction with last flight

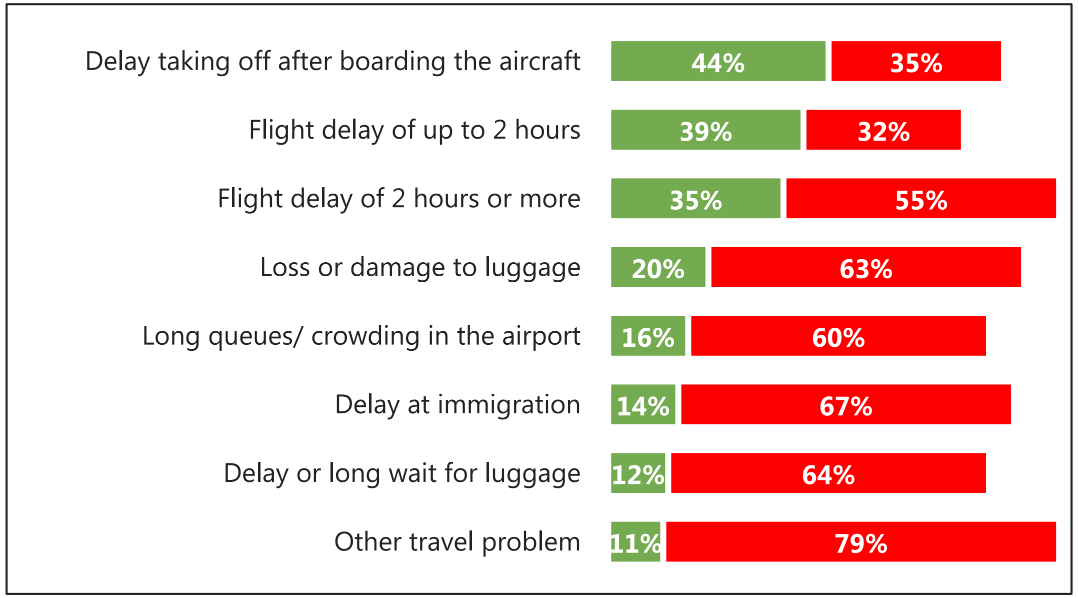



Ipsos Loyalty

# Disruption & understanding terms and conditions

**Disruption**

- Those who have experienced disruption give consistently lower ratings across the entire journey experience. The most commonly cited disruptions are crowding and long queues at the airport, delays once boarding prior to take-off and delays of up to 2 hours. A third (32%) of those who experienced a disruption were not informed of the reason for this.
- Satisfaction decreased in all aspects of complaint handling. 38% of those who had a complaint were satisfied with how fairly they were treated, falling to 32% satisfied with the redress offered. Only the speed of response to a complaint was more satisfying than dissatisfying.
- When looking at specific issues there is some variance in levels of satisfaction. Delays experienced in the airport environment yield lower satisfaction than a delay experienced on the aircraft.
- Over one third said a delay of up to 2 hours would make them feel extremely frustrated and cause them question using the airport or airline again.
- Amongst complainants, the majority (83%) did not escalate their complaints to a third party. For those who did, half (55%) were satisfied with how this was handled.




**T&Cs**

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

Ipsos Loyalty

Civil Aviation Authority

# PRM experience

**PRM profile**

- Almost one in five UK consumers is a PRM (a Person of Reduced Mobility: someone who has a disability or health condition that limits their day to day activity). They are slightly more likely to be male and have an older age profile compared to non-PRM passengers. Half (49%) of PRM state that their disability does or would cause difficulties flying. 54% have a physical condition, 19% non-physical and 27% a combination of the two, whereas 61% have a hidden condition, 15% a non-hidden condition and 23% a combination of the two.

**Perceptions**

- PRM generally have poorer perceptions of flying than non PRM; they are less likely than non PRM to find other information that is important to them when searching for flights, less confident that they get the service that they paid for, less confident in the safety of airports and airlines and less likely to agree that the balance between security and screening is right.

**Barriers**

- PRM are less likely than non PRM to have flown in the last 12 months (34% vs 58%) and are more likely to have never flown (11% compared to 4%). PRM's that need assistance and either have non-physical or hidden disabilities are less likely to have flown in the past year compared to non-PRM. As with UK consumers overall, PRM's main barrier to flying continues to be cost and budget constraints (38%), with difficulties at the airport or in flight related to their health condition or disability the next biggest barriers to flying (25% and 27% respectively).

**Experience**

- When PRM do fly, satisfaction with the journey overall and across elements is high, although their levels of satisfaction are generally slightly lower than those of non-PRM passengers. The experience at the airport was the only aspect of the journey that PRM felt notably less satisfied with than non-PRM.

- PRM who flew within the last year felt better informed about the assistance available and more optimistic about their assistance needs being met during their journey than PRM passengers who had last flown more than a year ago. Satisfaction is typically high when assistance is requested for the journey (81%) and satisfaction is also high across elements of assistance.

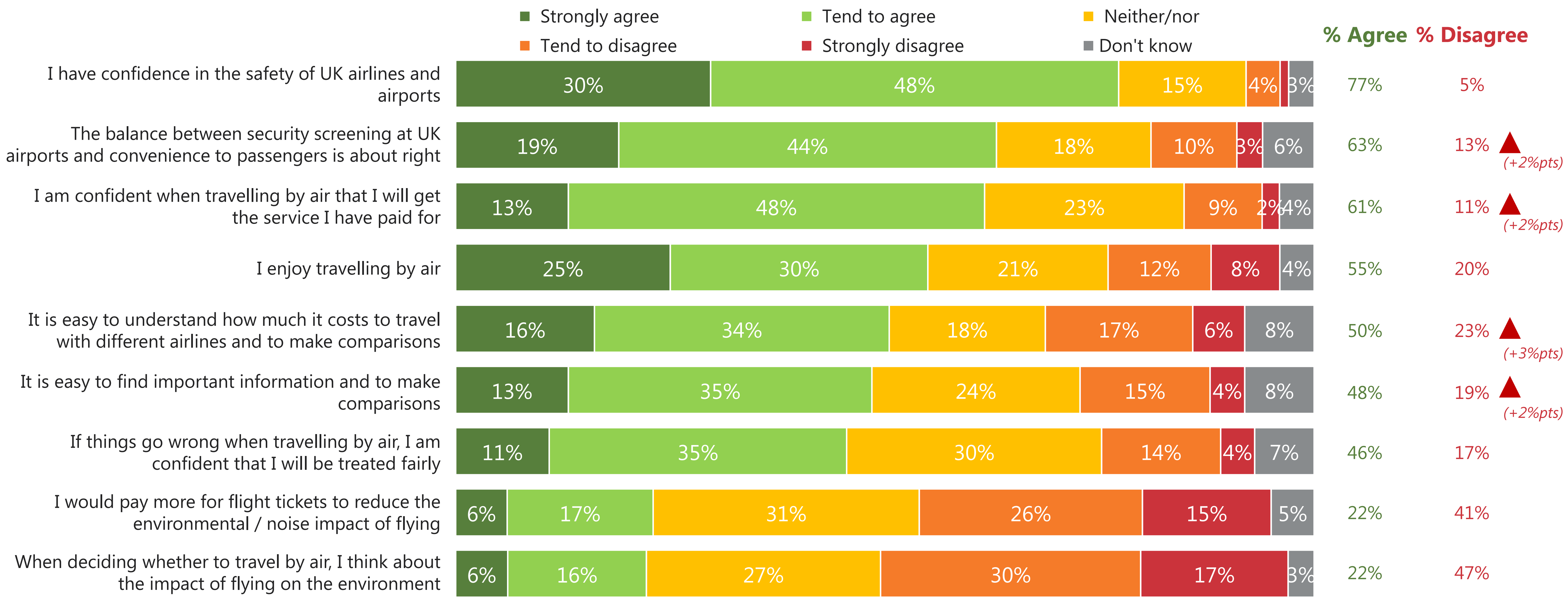
Ipsos Loyalty

# Headline measures

Ipsos Loyalty

# Headline Measures: Overall

Three quarters of UK consumers are confident in the safety of UK airlines and airports, but only around a fifth consider the environmental impact when flying. There have been some small but statistically significant increases in disagreement with certain statements.




Ipsos Loyalty

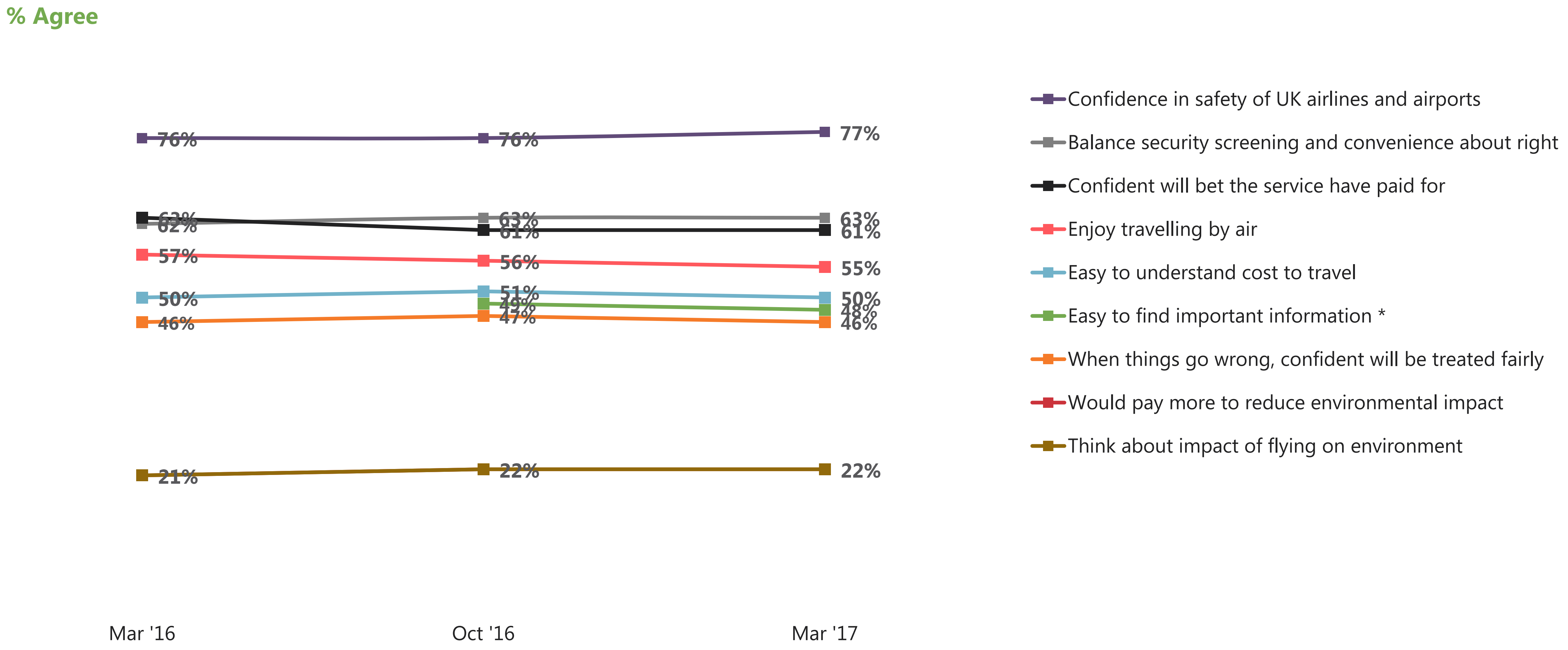
Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3502)

Civil Aviation Authority

# Headline Measures: Trend

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

Agreement levels are unchanged against the previous survey waves.



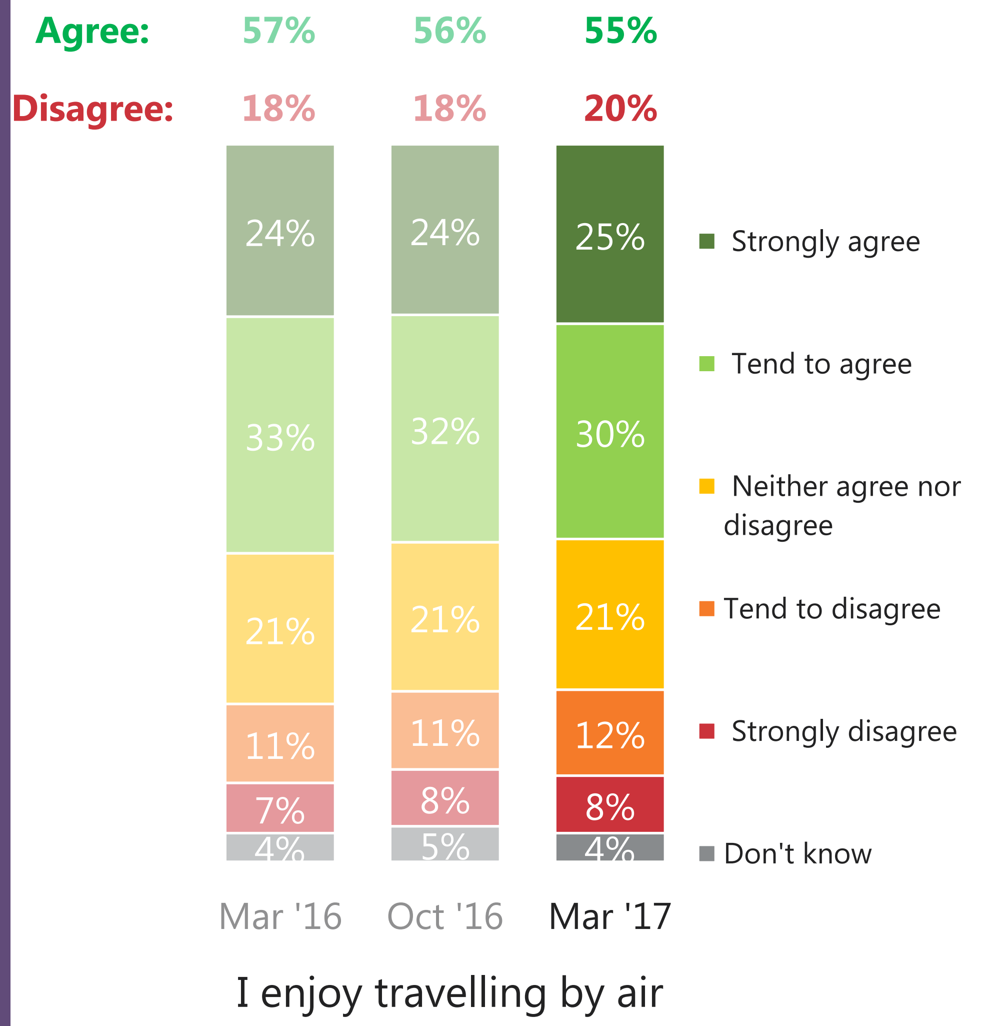

Ipsos Loyalty

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 (3502)
*statement wording changed for Oct' 16, hence no data shown for March '16.

Civil Aviation Authority

# Headline Measures: Overall

## Consistently over half of UK consumers enjoy travelling by air, with a quarter strongly agreeing.  A fifth disagree.




- Those with more recent flying experiences are more likely than average to agree that they enjoy travelling by air, with 62% of those flying in the past 3 years agreeing compared to 55% on average.  Disagreement with the statement is higher amongst lapsed flyers, rising to 23% for those who last flew between four and ten years ago and 29% for those who last flew ten+ years ago.

Flying behaviour

- Those who anticipate flying more in the next 12 months are more likely to agree they enjoy flying (63%) whilst those who say they are likely to fly less are more likely than average to disagree (28%).
- Those whose last flight was in Business Class (70%) or Premium Economy (69%) are also more likely to agree that they enjoy flying.

Cabin class

- Certain subgroups of PRM are more likely than UK consumers overall to disagree that they enjoy flying.  These include PRM with air travel difficulties (25%) and PRM who need assistance when flying (25%).  When PRM who need assistance flying also have non-physical disabilities or hidden disabilities, this disagreement increases further, to 33% and 27% respectively.

PRM

- Differences in age and income reveal some differences in the enjoyment of air travel.  Those with household incomes of £40,000-£74,999 are more likely to agree they enjoy flying (61%) than overall.  In contrast, older consumers are more likely than average to disagree (23% of 55-64 year olds and 25% of those age 65 and over).

Demographics

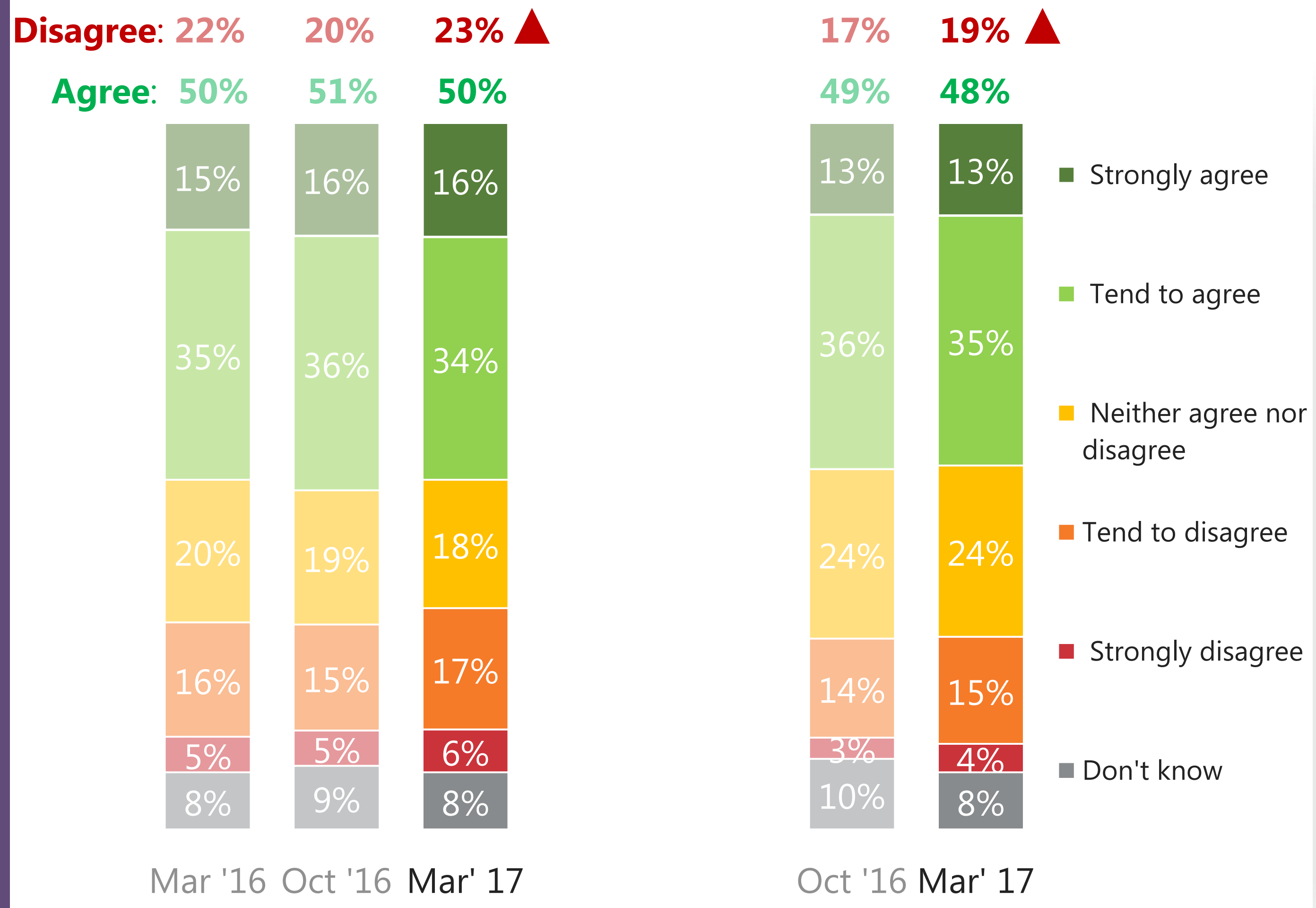
Ipsos Loyalty

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 (3502)

Civil Aviation Authority

# 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 has increased to almost a quarter and almost a fifth, respectively.




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

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

- **Flying behaviour**: Flying experience in the past 12 months correlates with higher agreement that costs are easy to understand (60%) and that other important information is easy to find (56%). Agreement is even higher among those that have travelled four or more times in the past 12 months (67% for ease of price comparisons and 63% for finding other information).
- **Cabin class**: Those whose recent flight was in Premium Economy are more likely to agree that price comparisons are easy to understand (67%) and that other information is easy to find and compare (66%) than other recent flyers. The same also looks true for those who travelled in Business, although the base size is lower to allow for a definite difference to be reported.
- **Booking method**: Recent flyers who last booked online are also more likely than average to agree with these statements (63% that it is easy to compare prices between airlines and 58% for other important information).
- **PRM**: PRM are less likely than non-PRM to agree with these statements. 46% of PRM and 52% of non-PRM agree that it is easy to make price comparisons, while 42% of PRM and 50% of non-PRM agree than it is easy to find other information and make comparisons. Disagreement that it is easy to find other important information increases for PRM that need assistance (26%) or have air travel difficulties (24%).
- **Income**: UK consumers with higher household incomes are more likely to agree that price comparisons are easy (56% of those with household incomes between £40,000 and £74,999 and 59% over £75,000) and that comparisons of other important information is easy (54% for both of those income groups).

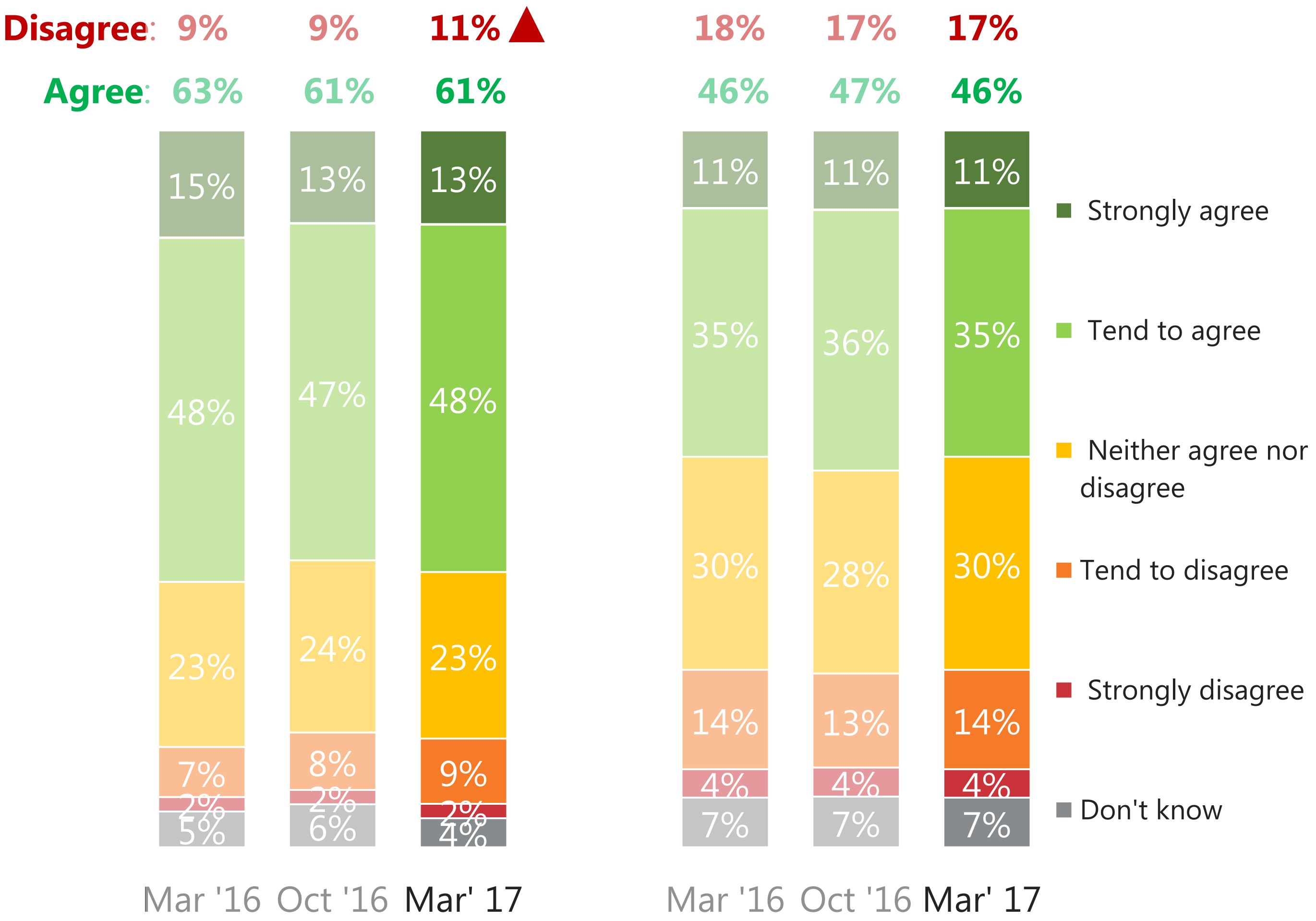
Ipsos Loyalty

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 (3502).

Civil Aviation Authority

# Headline Measures: Consumer Confidence

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




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

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

**Flying behaviour**

- 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 (67%) and that they will be treated fairly (49%) if things go wrong. Although agreement levels hold up for those who have flown four+ times in the past 12 months, this group do have a more polarised view and show higher disagreement levels (14% and 23% respectively).

**Disruption**

- Disruption on the last flight has an impact on opinion and leads to higher disagreement levels. 21% of those who experience what they perceive to be disruption disagree that they will get what they paid for, and 31% disagree that they will be treated fairly.

**Flight purpose**

- When the last flight was for business purposes, recent flyers are more likely than average to disagree that they will get what they've paid for (17%) or that they will be treated fairly (26%). In contrast, 68% of those whose recent flight was for non-business purposes agree they will get what they paid for and 49% agree that they are confident they will be treated fairly, significantly higher than average.

**PRM**

- PRM (55%) are less likely to agree that they will get what they paid for than non-PRM (63%). When PRM disabilities are non-hidden and they need assistance when flying, disagreement with this statement increases to 18%, and this group are also more likely than average to disagree that they will be treated fairly if something goes wrong (26%).

**Demographics**

- Those age 65+ (14% and 21%) and the highest earners with household incomes of £75,000 or more (16% and 24%) are more likely than average to disagree they will get what they paid for or will be treated fairly.

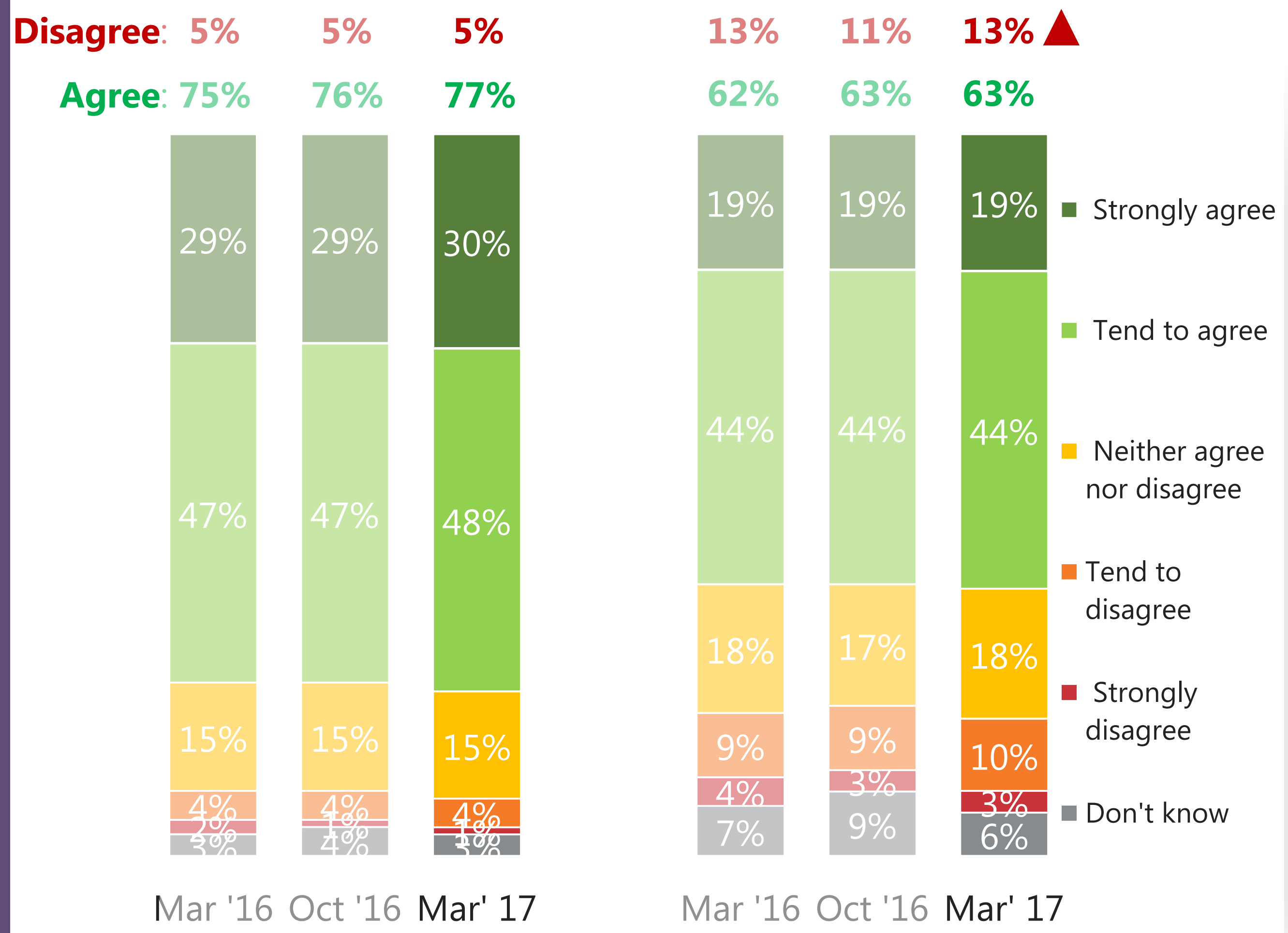
Ipsos Loyalty

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 (3502)

Civil Aviation Authority

# Headline Measures: Security and Safety

## Confidence in the safety of UK airlines and airports is stable as the highest rated headline measure.




I have confidence in the safety of UK airlines and airports

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

- As with other headline measures, those with more recent flying experience are more likely than UK consumers overall to agree. 83% of those that have flown in the past 3 years have confidence in UK airport and airline safety and 71% agree the security balance is about right. Of note, however, 17% of those that flew in the last 3 months disagree that the screening balance is right. **Flying behaviour**
- 91% of those who travelled in a premium cabin on their last flight have confidence in safety and security, higher than UK consumers overall. **Cabin class**
- Those who experienced what they perceive to be disruption on the last flight are more likely than average to disagree that the security screening balance is right (19%), while those who experienced no disruption are more likely to agree than overall (76%). **Disruption**
- PRM (72%) are less likely than non-PRM (79%) to have confidence in the safety of UK airlines and airports. However, in-line with the general consumer trend, PRM who have flown in the past 12 months are more likely than average to agree (86%). **PRM**
- Looking more specifically at this group, PRM who need assistance when flying are more likely than average to disagree (9%), and this is even more pronounced when this group has a non-physical disability (16%). Similarly, PRM (55%) are less likely to agree that the security screening balance is right than non-PRM (65%). Disagreement is higher than for UK consumers overall among PRM who have a non-physical disability (18%), have a hidden disability (17%) or would have difficulty when flying (17%).
- High earners are most likely to have confidence in safety and security (81% of those earning between £40,000 and £74,999 and 82% over £75,000. 80% of those aged 65 and over also agree. **Demographics**

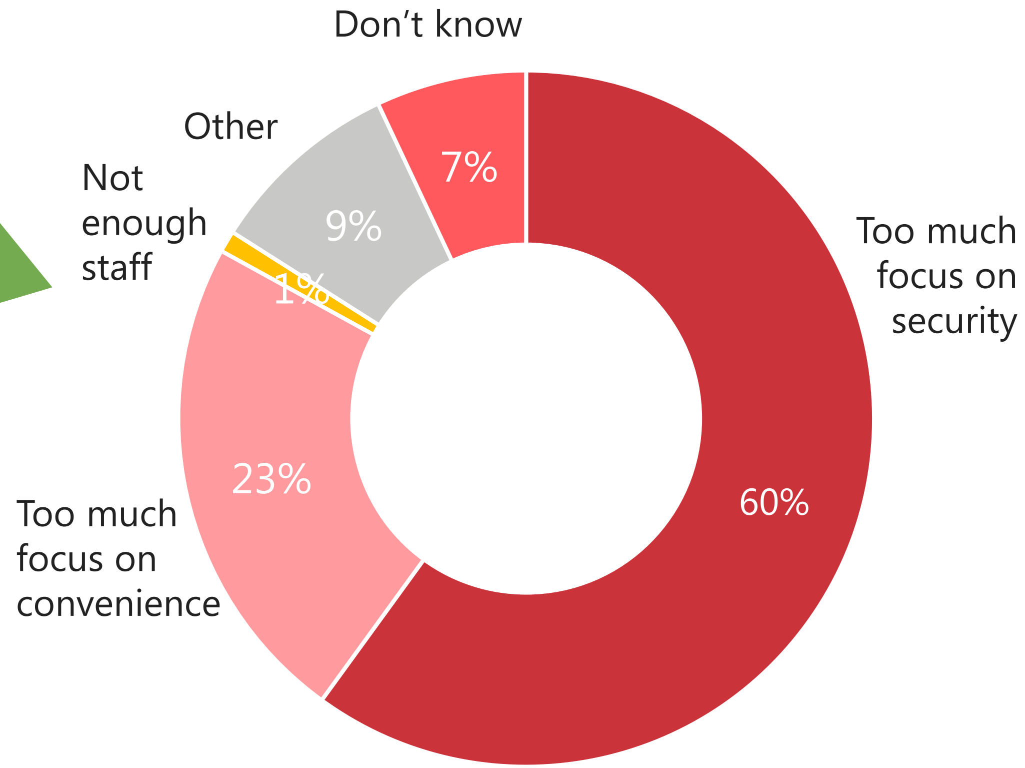
Ipsos Loyalty

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 (3502)

# Imbalance between security screening and convenience

For those who believe there is an imbalance in security screening, this is nearly three times as likely to be blamed on too much focus on security rather than too much focus on convenience.

**13%** Think the balance between security and convenience is not right.




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

- From a prompted list of reasons, the main reason given for the balance between security and convenience not being right is that too much focus is put on security. This is more likely to be said by recent flyers (68% of those who have flown in the last 12 months) than non-recent flyers (only 52% who have ever flown but not in the last 12 months).
- Frequent flyers within the past 12 months tend be believe there is too much focus on security screening: 69% of those who have flown 4+ times, 72% of those who have flown 2-3 times, compared to only 60% of those who have flown once in the past 12 months.
- There is no real difference in opinion between PRM and non-PRM, although PRM with a physical difficulty think too much focus is put on security (73% of those who believe the balance between security and convenience is not right).
- As reported last wave, men are more likely to say there is too much focus on security, 67% vs 50% of women. No marked differences are found by age.

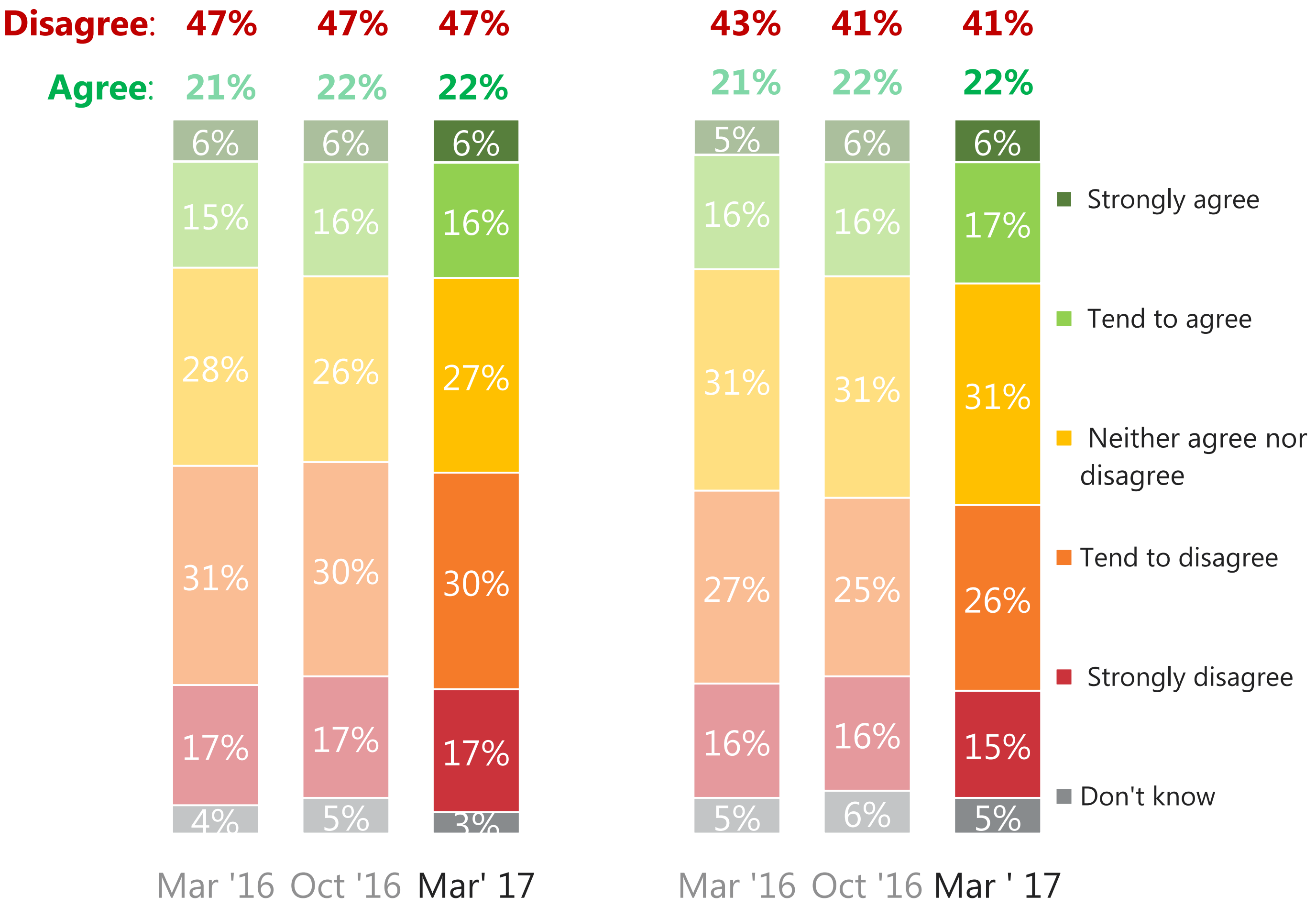
Ipsos Loyalty

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 (453)

Civil Aviation Authority

# Headline Measures: Environment

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




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

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

- As found in previous survey waves, younger consumers show greater concern for the environment, with 25% of 18-34s agreeing that they think about the impact of flying on the environment, compared to 16% of over 65. These age groups also claim they are willing to pay more, with 27% of those age 18-34 agreeing that they would pay more, compared to 18% of the older age group. — Age
- Whilst there was no difference in consideration about the impact of flying on the environment between those last flying for business vs leisure reasons, those flying for business purposes claim they would be willing to pay more to reduce the environmental impact (29% vs 24% of recent leisure/non-business flyers). — Purpose
- As found last wave, those flying Emirates are more likely than average to agree that they think about the environment and are willing to pay more for their ticket (37% and 34% respectively). — Airline
- UK consumers flying without children on their last flight are more likely to disagree with both statements; 54% and 45% respectively. — Children
- Interestingly, and as found last wave, those in the higher household income brackets are more likely to disagree that they think about the environment; with 54% of those in households earning £40,000 or more disagreeing. — Income

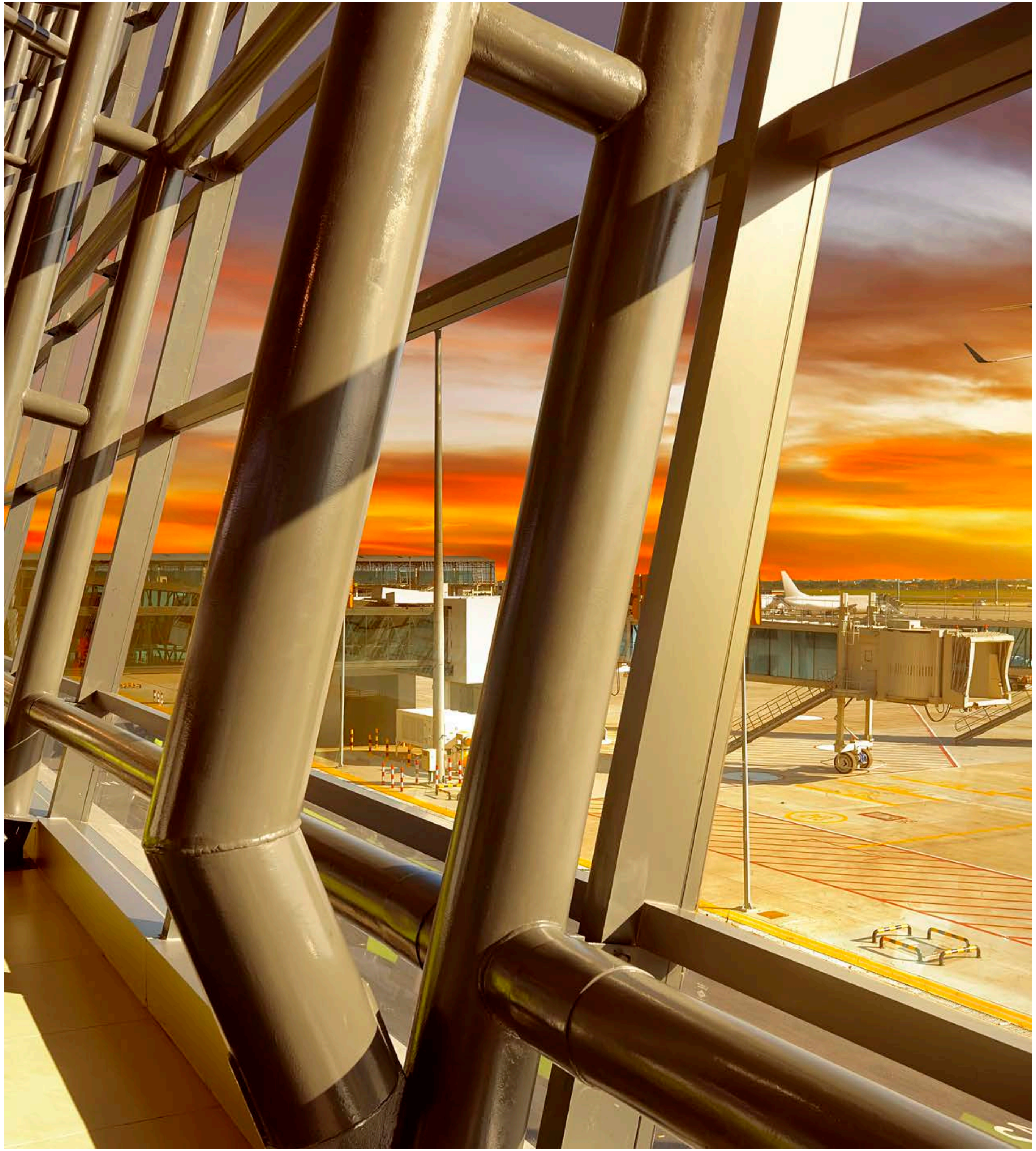
Ipsos Ipsos Loyalty

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 (3502)

Civil Aviation Authority

# Flying behaviour

Ipsos Loyalty



# Flying behaviour - Summary

**The vast majority have flown in the past and over half and flown in the past 12 months. Most flying is for holiday purposes. Budget constraints continues to be the biggest barrier to flying.**

- **94% have past flying experience and over half (54%) have flown in the past 12 months.**
  - PRM (11%) are more likely to have never flown than UK consumers overall (5%), as are those on low incomes (12% of those with a household income of up to £14,999 and 8% with a household income of £15,000 to £24,999).
  - Conversely, non-PRM (58%) and those on higher incomes (69% of those with incomes of £40,000 to £74,999 and 79% of those with incomes of £75,000 or more) are most likely to have flown in the past 12 months (compared to 54% of UK consumers overall). In addition, those living in Northern Ireland (68%) and London (65%) are more likely than UK consumers overall to have flown in the past 12 months.
  - 45-54 year olds (13%) and 55-64 year olds (15%) are more likely than overall (10%) to have flown previously but not in the past 10 years. This is also true of those on low incomes (20% of those with a household income of up to £14,999 and 14% with a household income of £15,000 to £24,999).
- **Holiday continues to be the main reason for people flying (87%).**
  - Three in ten (30%) fly to visit friends or relatives and 13% do so for business or work reasons.
- **The cost of travel/budget constraints is consistently the biggest barrier to flying overall (41%) and across all subgroups.**
  - 28% have not travelled recently due to not making any trips where flying is an option. Other barriers to flying, each mentioned by around one in ten, are fear of flying, preference of another mode of transport, health or disability reasons, and a dislike of the airport or flying experience.

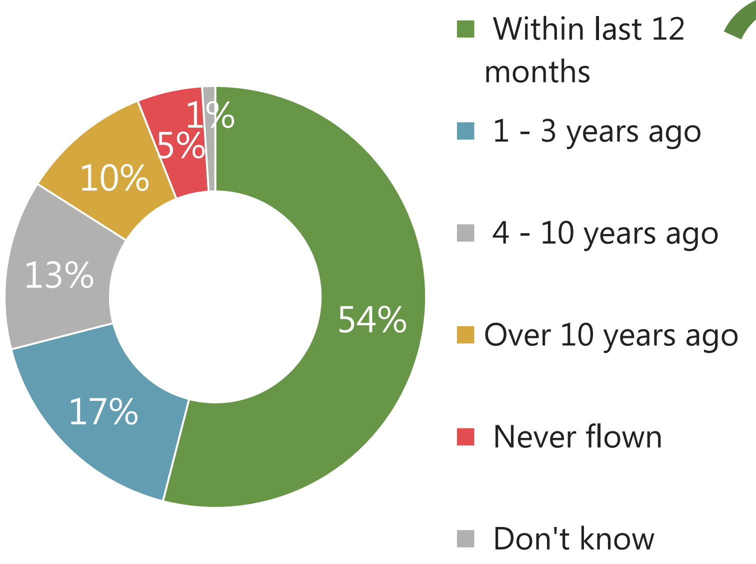
Ipsos Loyalty

Civil Aviation Authority

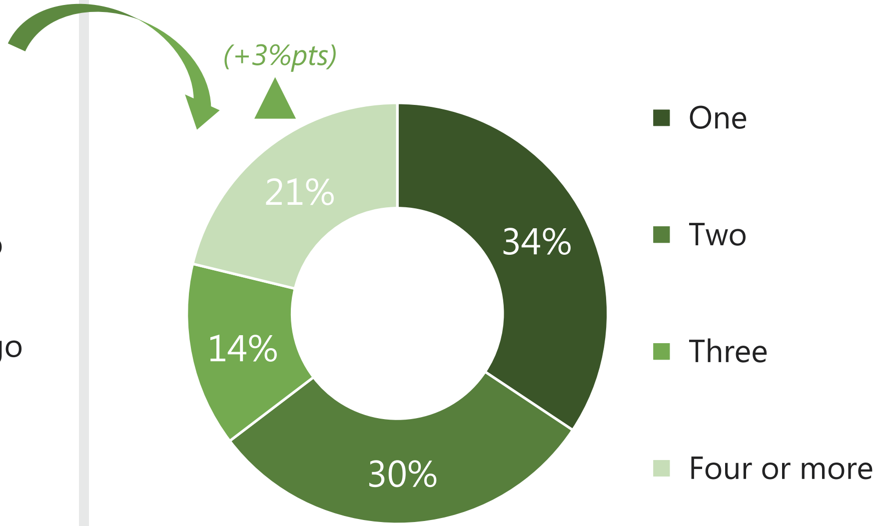
# Flying behaviour: A general overview

Flying behaviour has been consistent over time, with just over half of UK consumers flying in the last year and two thirds of these recent flyers having once or twice in the last year. Holiday remains the most common flight purpose.

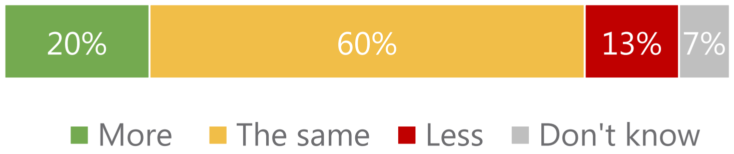
## Last flight from a UK airport



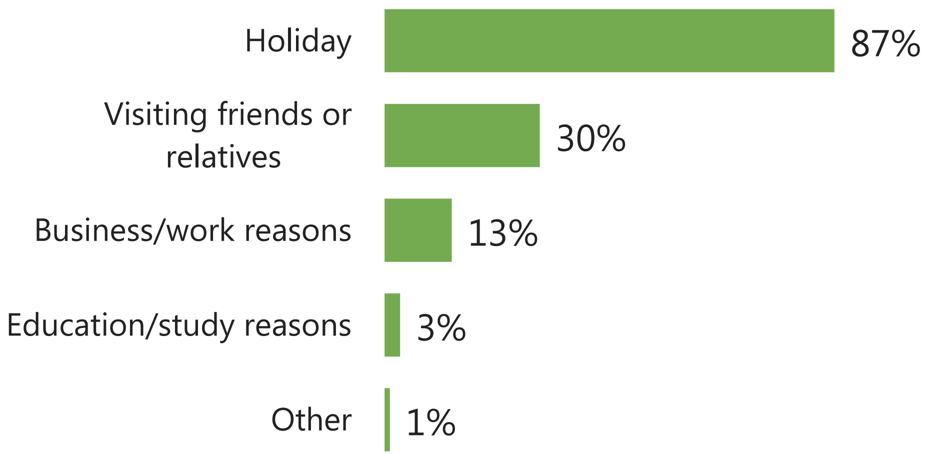

## Number of flights in the last 12 months




## Anticipated changes in the next 12 months




## Purpose of flights in the last 12 months



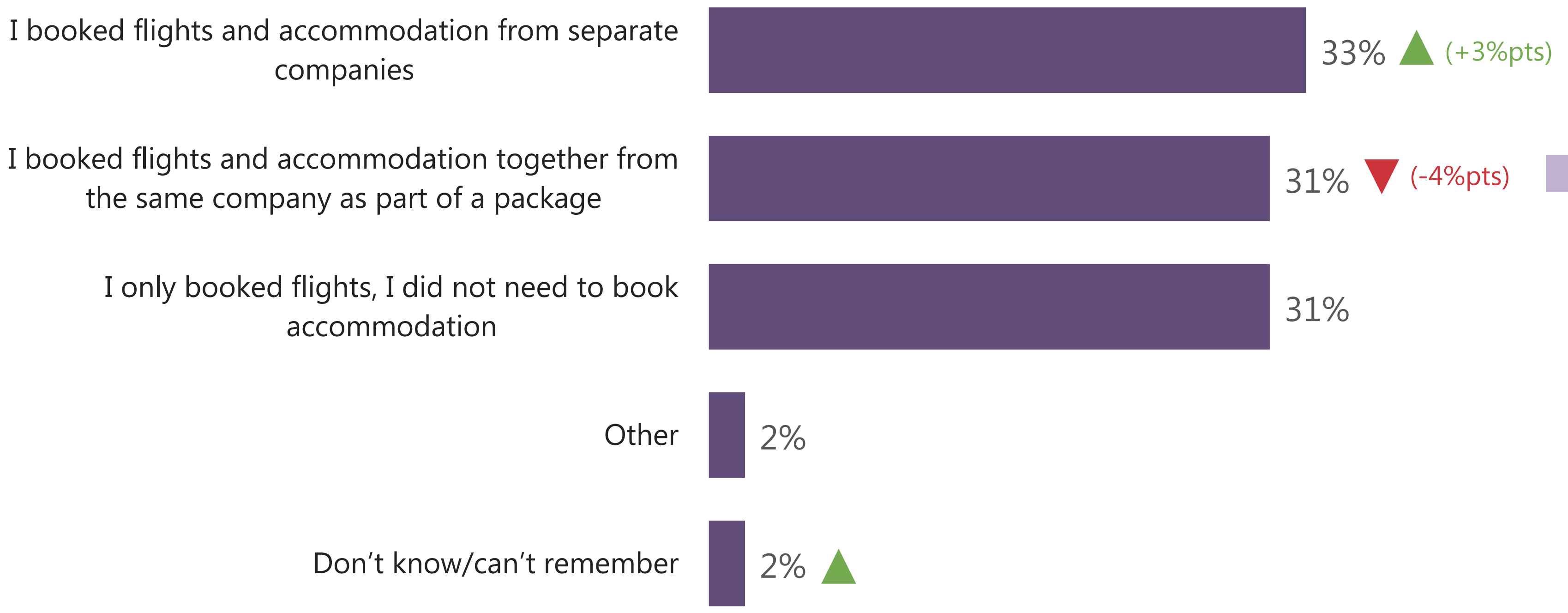

Q10. When was the last time you flew from a UK airport? Base: All participants (3502) | Q11. How many trips by air have you made in the last 12 months? Base: All participants flown in last 12 months (1902) | Q12. For which of these reasons have you made flights in the last 12 months? Base: All who have flown in the last 12 months (1899) | Q13. In the next 12 months, do you expect that you will fly more, the same amount or less compared to now? Base: All participants (3502)

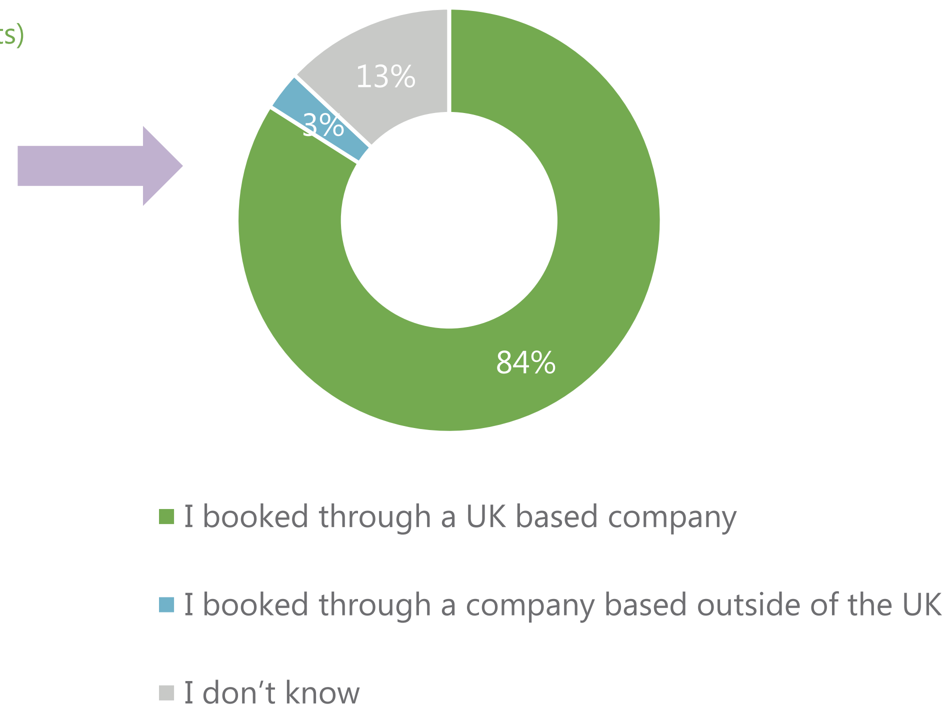
Ipsos Loyalty

# Flight and accommodation booking

There is a relatively even split between accommodation being booked with flights, separately to flights and not needing to be booked at all.

Where flights are booked together as part of a package, this tends to be through a UK based company.




Ipsos Loyalty

Q57b When booking your most recent trip, which of the following statements best applies to you? Base: All who have flown in the last 12 months (1,899) | Q57c When booking your trip, where was the company you booked through based? Base: All who booked as part of a package (600)

# Flying behaviour: Barriers

## Budget constraints/cost of travel remains the biggest barrier to flying.

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

| | | October 2016 | March 2016 |
|---|---|---|---|
| Budget constraints/the cost of travel | 41% | 42% | 42% |
| Not made any trips where flying would be an option | 28% | 30% | 28% |
| Fear of flying | 9% | 10% | 11% |
| Prefer another mode of transport (e.g. car, boat or train) | 9% | 10% | 11% |
| Don't have the time to travel within the UK or abroad | 8% | 7% | 8% |
| Dislike airports/the flight experience | 8% | 9% | N/A |
| Health or disability reasons make it difficult to manage on the flight | 8% | 9% | 8% |
| Health or disability reasons make it difficult to manage at the airport | 7% | 8% | 8% |
| Flying is difficult due to pregnancy, children, elderly, etc. | 5% | 6% | 5% |
| Getting to the airport is difficult | 3% | 4% | 4% |
| Concerns about the environment/carbon footprint | 3% | 3% | 3% |
| Bad previous experience has put me off | 2% | 3% | 3% |
| Illness / ill health / in the family | 2% | 2% | 1% |

**10% mention health/disability, consistent with previous waves.**

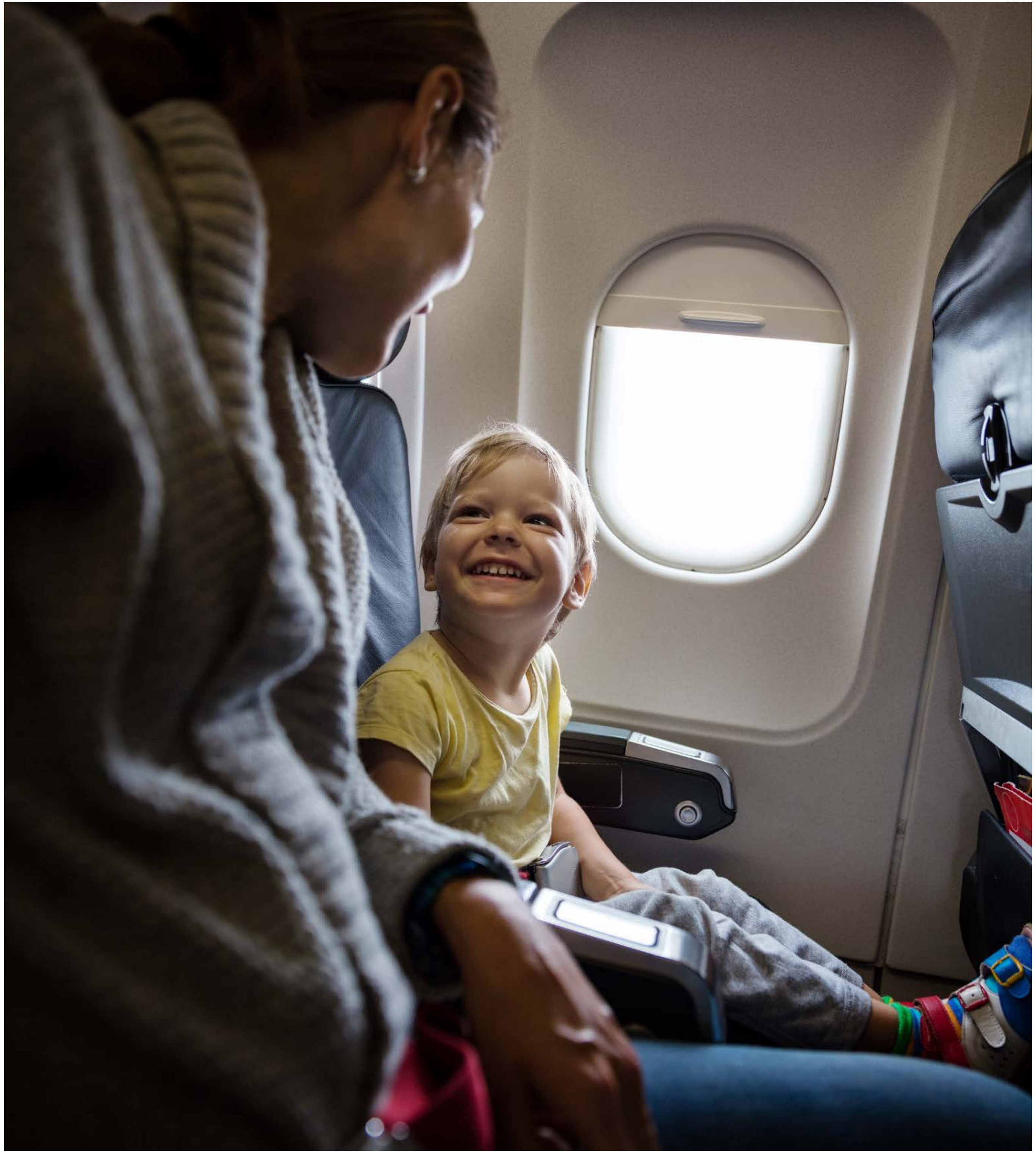
Ipsos Loyalty

Q20. Why have you not flown within the last 12 months/not flown in recent few years/never flown? Base: All who have not flown in the last 12 months (1,600)

Civil Aviation Authority

# Recent flying experience

Ipsos Loyalty



# Recent flying experience - summary

**UK consumers demonstrate a clear seasonal trend in the flying behaviour, but experience is dominated by trips taken for holiday using a small number of airports and airlines. Overall satisfaction with recent flying experience has fallen and is significantly lower than in March 2016, which appears to be linked to a worse ratings of the airport, and particularly the security, experience.**

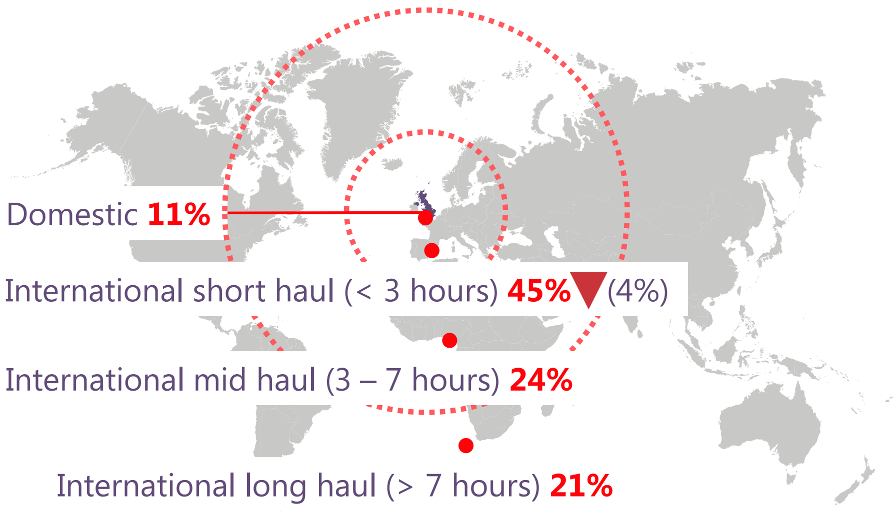
- **Clear seasonal differences impact upon how recent the last flight experience is for, but satisfaction scores are generally consistent as a small number of airports and airlines dominate recent experiences, which are overwhelmingly in Economy Cabin Class and for a holiday.**
  - Over one third of consumers surveyed last flew more than six months ago, and one in five flew within the last month. This represents similar figures to those seen in March 2016 and highlights the seasonal nature of flying behaviour in the UK.
  - Consistent with previous waves, Gatwick, Heathrow and Manchester are the most commonly used airports, while Easyjet, British Airways and Ryanair are the most widely used airlines.
- **Satisfaction with organising a flight remain high, but some regions are less satisfied with the choice between airports, and many fliers select to take a less convenient or comfortable flight to save money.**
  - More than four in five consumers are satisfied with the process of booking the flight (88% satisfied) and deciding which flight to book (86% satisfied), but satisfaction with the amount of choice between airports and airlines drops to two thirds (66% and 64% respectively).
  - Satisfaction with the choice between airports has dropped significantly since October 2016, but ratings are particularly low in the North East (53% satisfied) and South West (56% satisfied)
- **Overall, satisfaction with their experience among recent fliers has slipped to 87%. This is a slight but significant drop from 90% in March 2016 and mirrors a similar fall in the rating of the UK airport experience, which has fallen from 83% in March 2016 to 79% in March 2017.**
- **Satisfaction ratings of airport experience demonstrate the importance of airport security, satisfaction with which shows a significant fall wave-on-wave, from 85% to 82%. Ratings of passport control; shops, restaurants and services, and transfers and connections have also show declines, although the changes in these scores are not statistically significant.**

Ipsos Loyalty

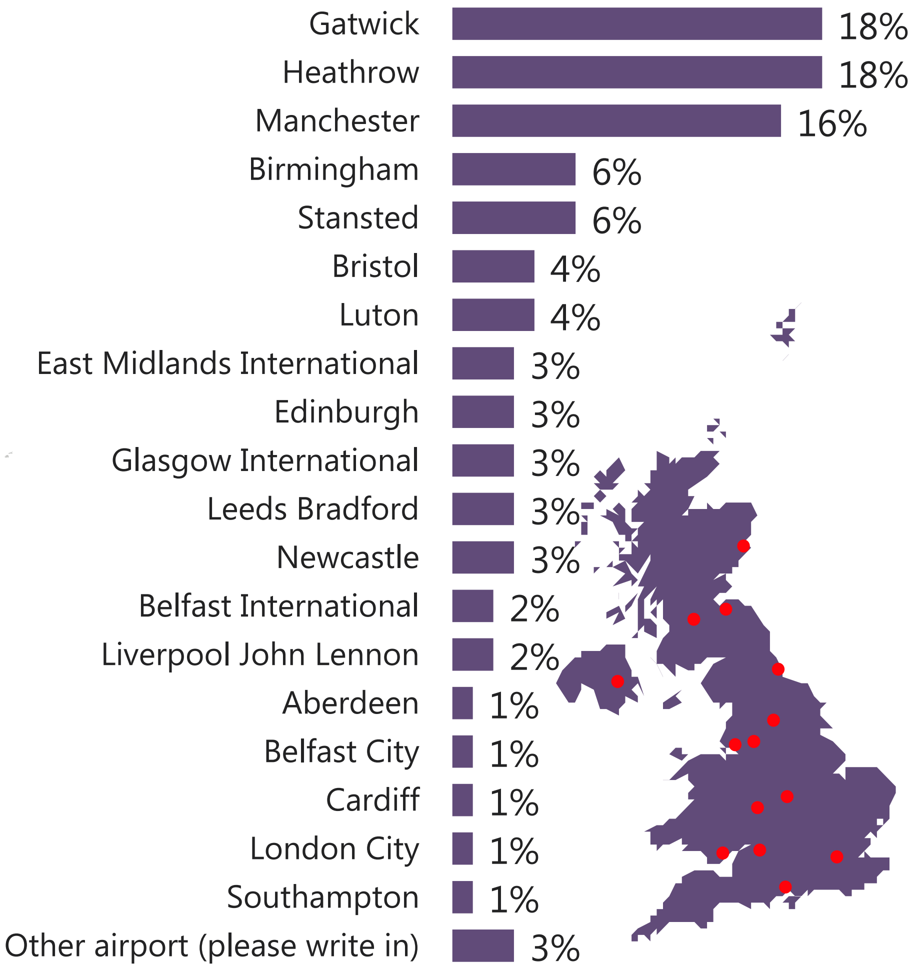
# Last flight: Journey details (1)

Most recent flights are international short haul, and a small number of airports and airlines are most frequently used by consumers.

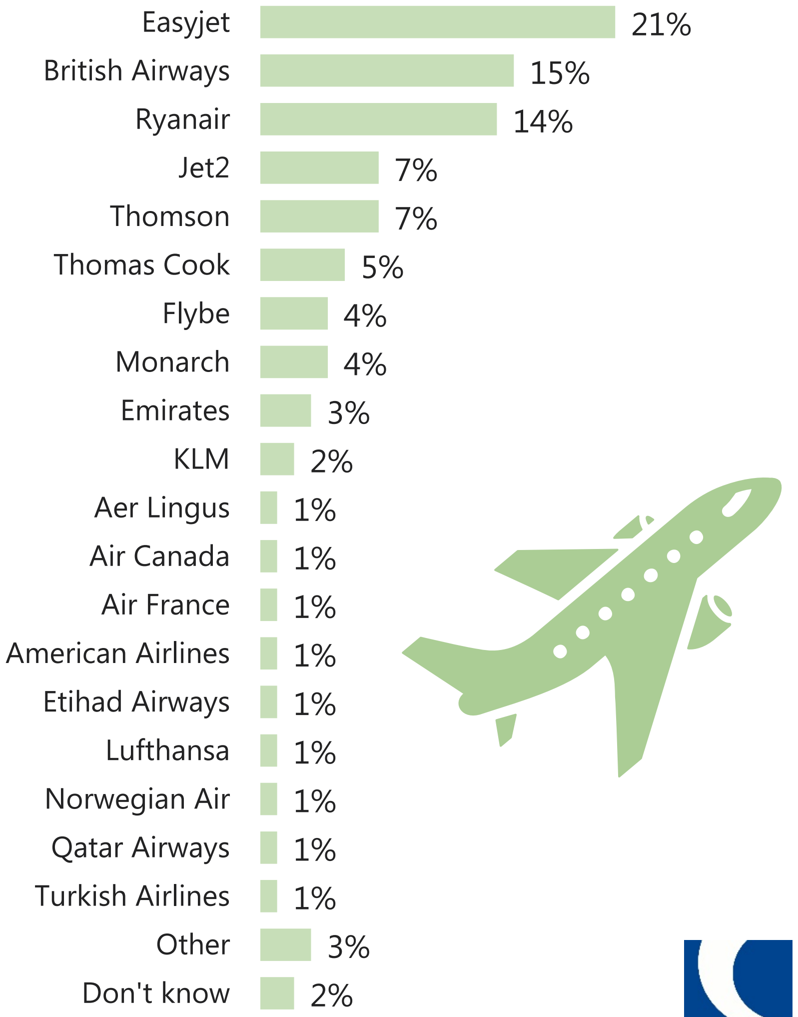
## Was the flight domestic or international?




## Departure airport




## Airlines used




Ipsos Loyalty

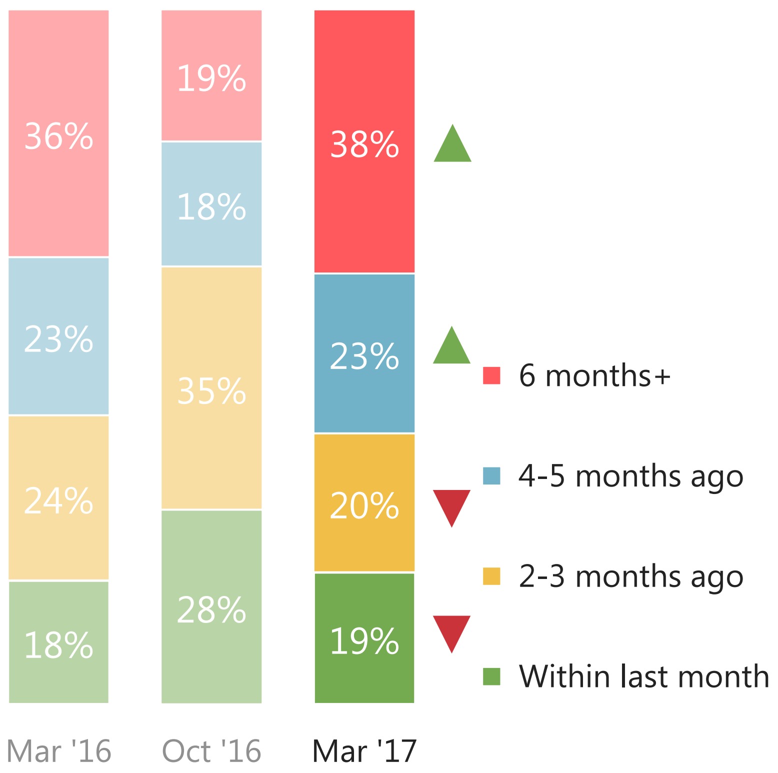
Q51. Was this flight domestic or international?, Q53. What airport did you fly out from in the UK?, Q52. Which airline or airlines did you fly with on your most recent trip? Base: All who have flown in the last 12 months (1,965)

Civil Aviation Authority

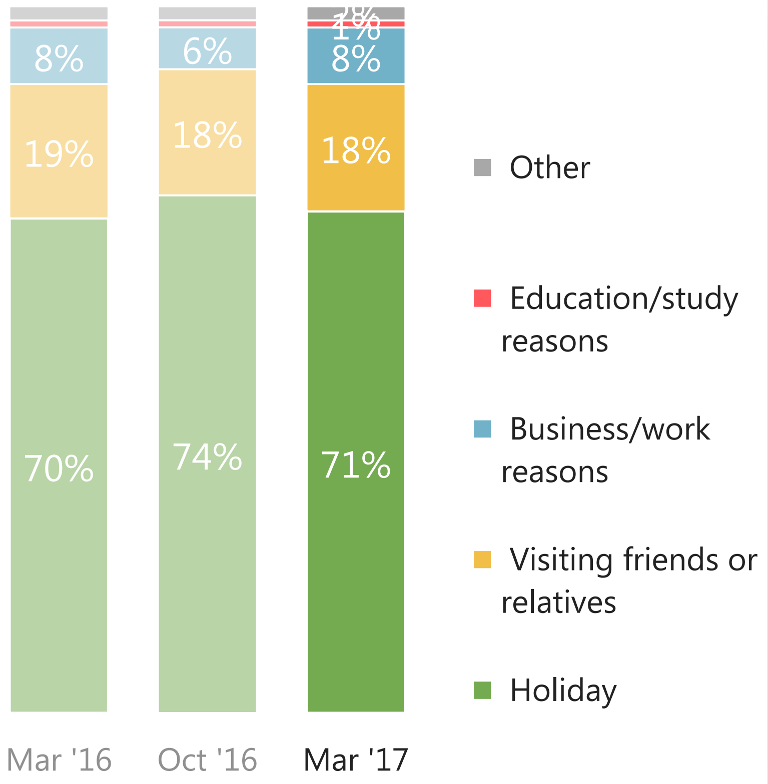
# Last flight: Journey details (2)

A seasonal shift highlights that many consumers most recent experience of flying is in the summer, but purpose of trip for the majority is to go on holiday.

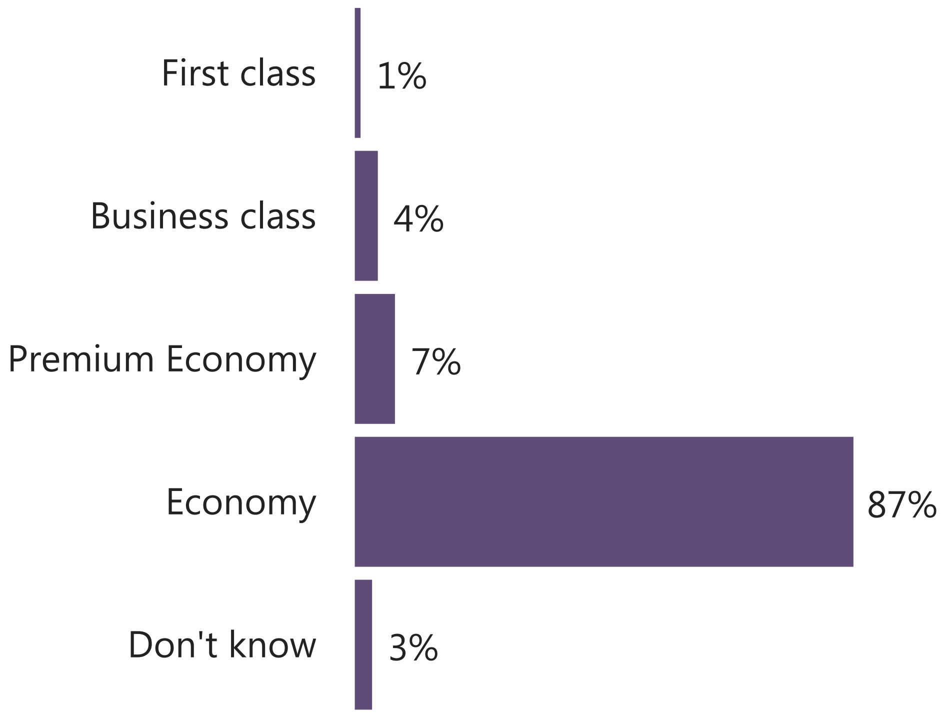
Recency of last flight




Main flight purpose last flight




Cabin class




Ipsos Loyalty

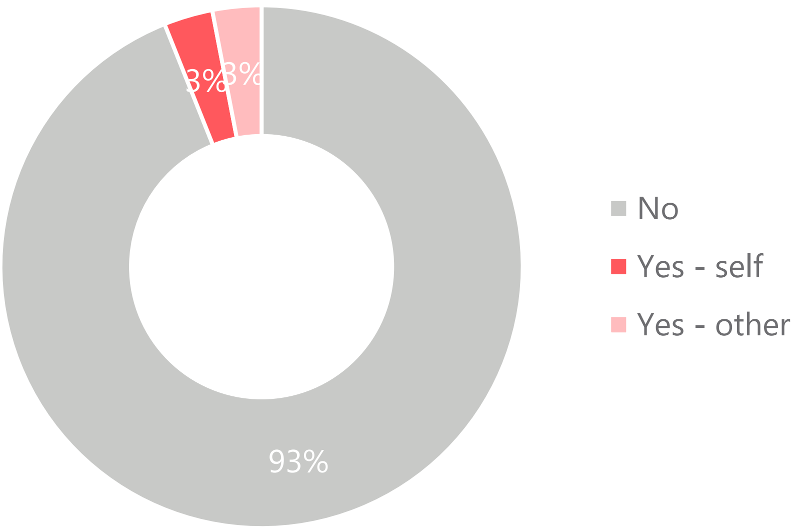
Q50. Roughly, when was the last time that you flew? Q52. What was the main reason for your last flight? Q54. Which cabin class did you travel in for your last flight? Base: All who have flown in the last 12 months (1,899)

# Last flight: Journey details (3)

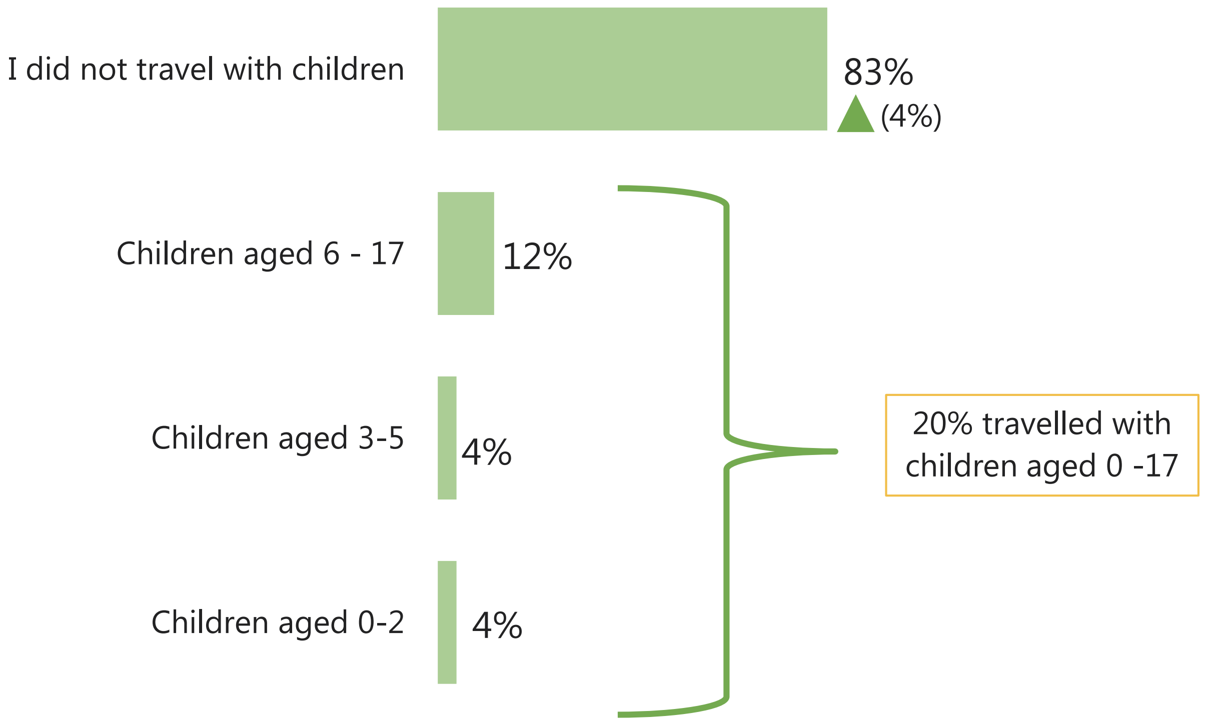
8% were travelling with at least one person in the party requiring assistance and over a fifth were travelling with children. There is a significant increase in fliers not travelling with children.

## Assistance needed last flight due to disability/health condition?

8% had at least one member of the party that required assistance




## Travelling with children on last flight?



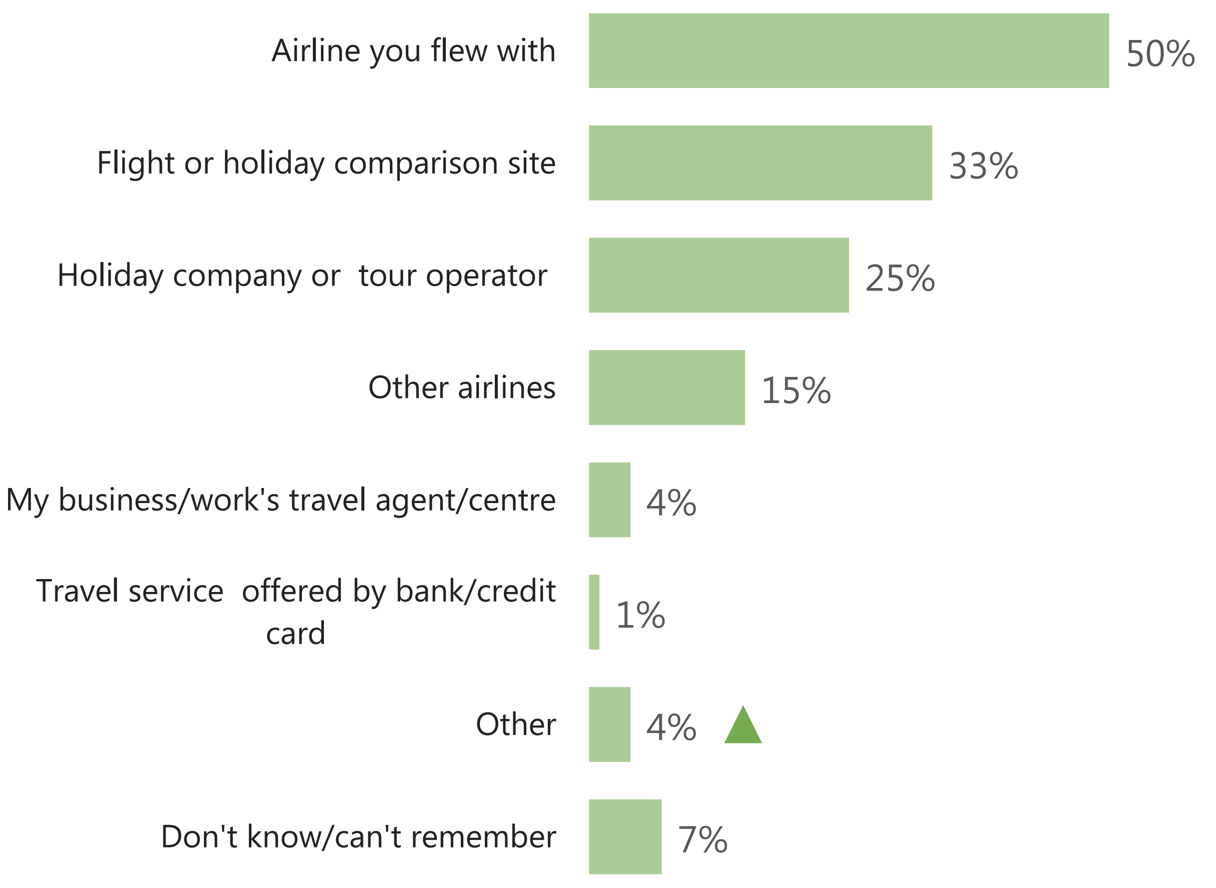

Ipsos Loyalty

Q55. If you travelled with children on this occasion, what age were the children?, Q56. Did you or anyone in your party have a disability or health condition that meant assistance from the airport or airline on either the outward or return flight?: Base: All who have flown in the last 12 months (1,899)

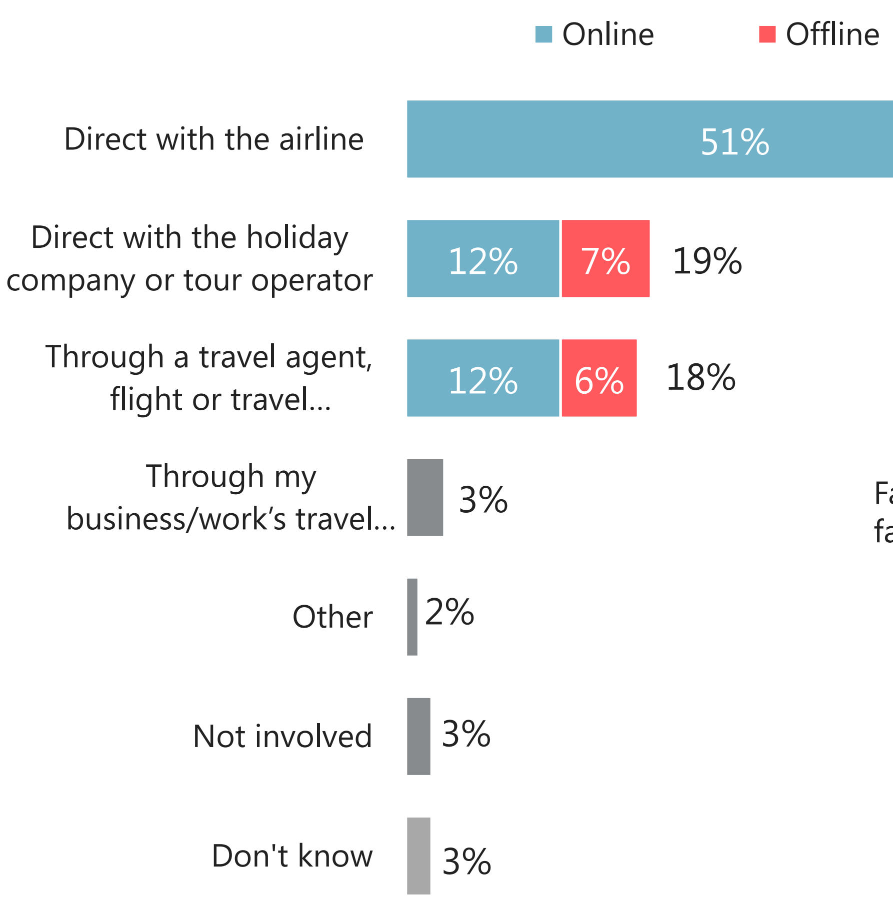
# Last flight: Booking method

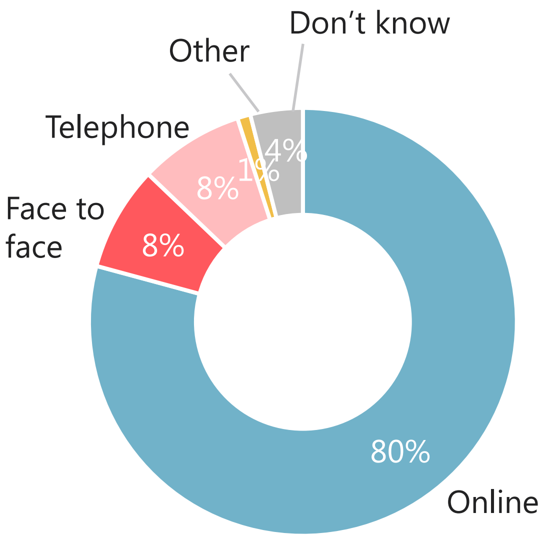
Half of travellers use the airlines they flew with to research their flight, and a similar proportion book directly with the airline itself. However, a minority research flights with other airlines. Comparison sites and holiday/tour companies are both more frequently used.

## Research sources




## Booking method on last flight




Q56b Which sources of information did you use when you were researching which flight to book? Q57. How was this most recent flight booked? Please tell us who you booked the flight with and then the method used. Base: All who have flown in the last 12 months (1,899)

Ipsos Loyalty

Civil Aviation Authority

# Extra information required when choosing and booking

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

Fast tracking for children with autism is not widely available yet. Hidden disabilities can prove problematic for airport staff and I think more training is needed."

My son needed to take medication for his kidney transplant so we needed information about carrying medicines on board our flight."

When booking I had to pay for a seat for the outbound flight and it was not clear you could avoid this until I searched their website afterwards. The fact that is was optional to book a seat in advance was not made at all clear."

I found it quite hard to work out the baggage rules for what is allowed in hand luggage - liquid, lipsalve, medicines etc. I fly very rarely and was worried about getting something wrong."

I just found it confusing looking at all the costs and deals available. Booking in general was quite complicated and I couldn't see any information about seats on the flight."

Information about transfer from the airport to the destination – due to time of arrival it wasn't clear whether the hotel would provide transfers. I tried to research it but in the end we paid extra for these at an inflated price.

The food. This company gives food during the flight but I have restrictions (gluten-free). It's hard to understand how to get that and I think you actually have to pay more for it."

I struggled to find anything about what the weight allowance was for golfing equipment.

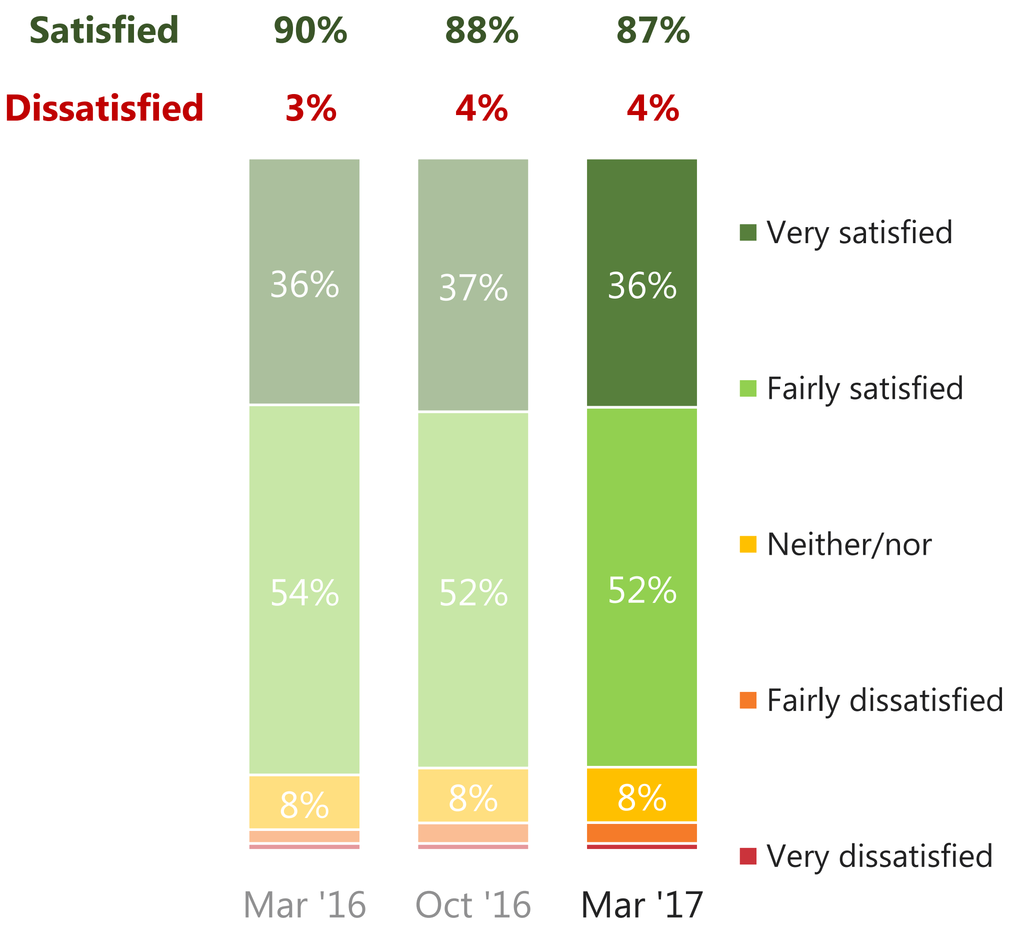
Ipsos Loyalty

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

Civil Aviation Authority

# Last flight: Overall satisfaction

Overall satisfaction levels remain high overall, but there has been a slight but significant drop in overall satisfaction compared to March 2016.




Overall satisfaction with travel experience

- With almost nine in ten satisfied with their recent flight experience, overall satisfaction remains consistently high across most sub-groups, but there is a slight but significant decrease on overall satisfaction since march 2016.
- Disruption has the greatest impact on satisfaction overall. If disruption is experienced, overall satisfaction falls to 69%, while dissatisfaction also increases significantly, to 18%, highlighting the importance of a smooth flight to consumers. **Disruption**
- The purpose of the trip also has an impact, with 82% of business travellers satisfied with their most recent flight. This group is also more lukewarm in their overall rating, with only 28% 'Very Satisfied.' **Business**
- PRM with non-hidden disabilities are also less satisfied overall, with 75% satisfied and significantly more also dissatisfied (14%). For those with hidden disabilities, overall satisfaction is similar to the overall figure. **Non-hidden disability**
- Among those who required assistance on their last flight, satisfaction drops to 82%, which although not statistically significant, compares negatively to the overall figure. **Required Assistance**
- Booking channel impacts on overall satisfaction levels, with those booking online with an airline significantly more satisfied (89%) than others. **Booking Channel**

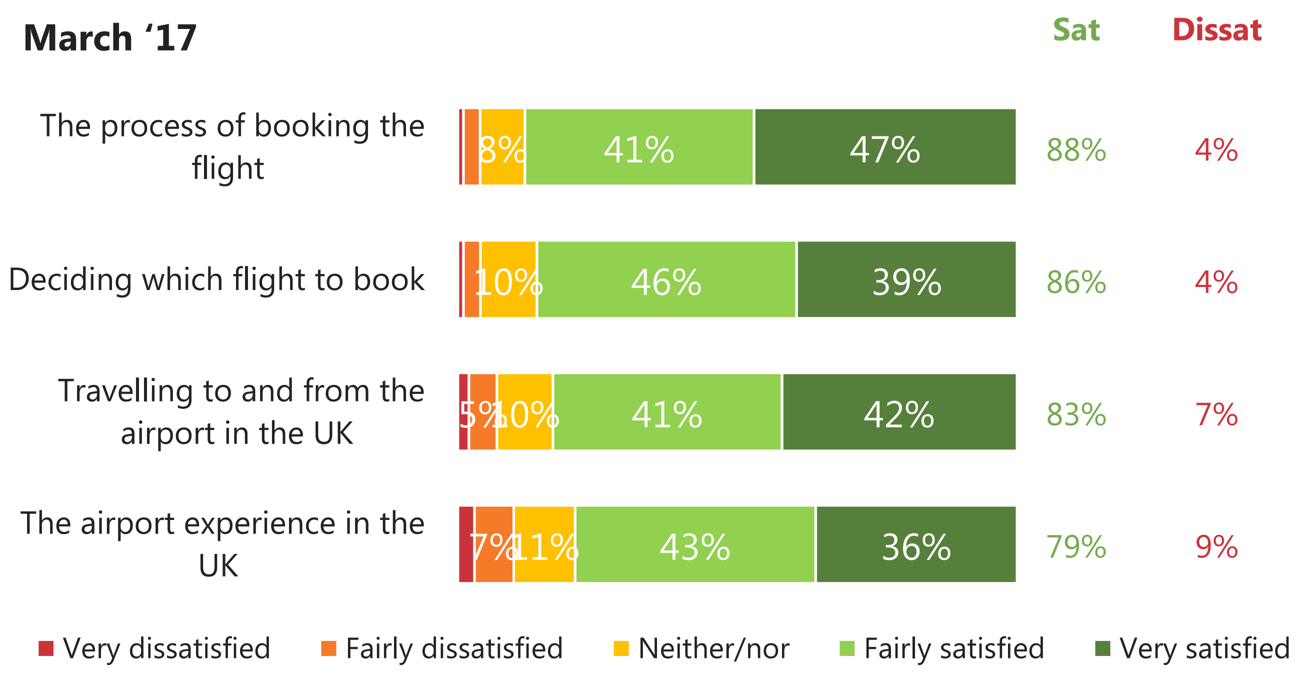
Ipsos Loyalty

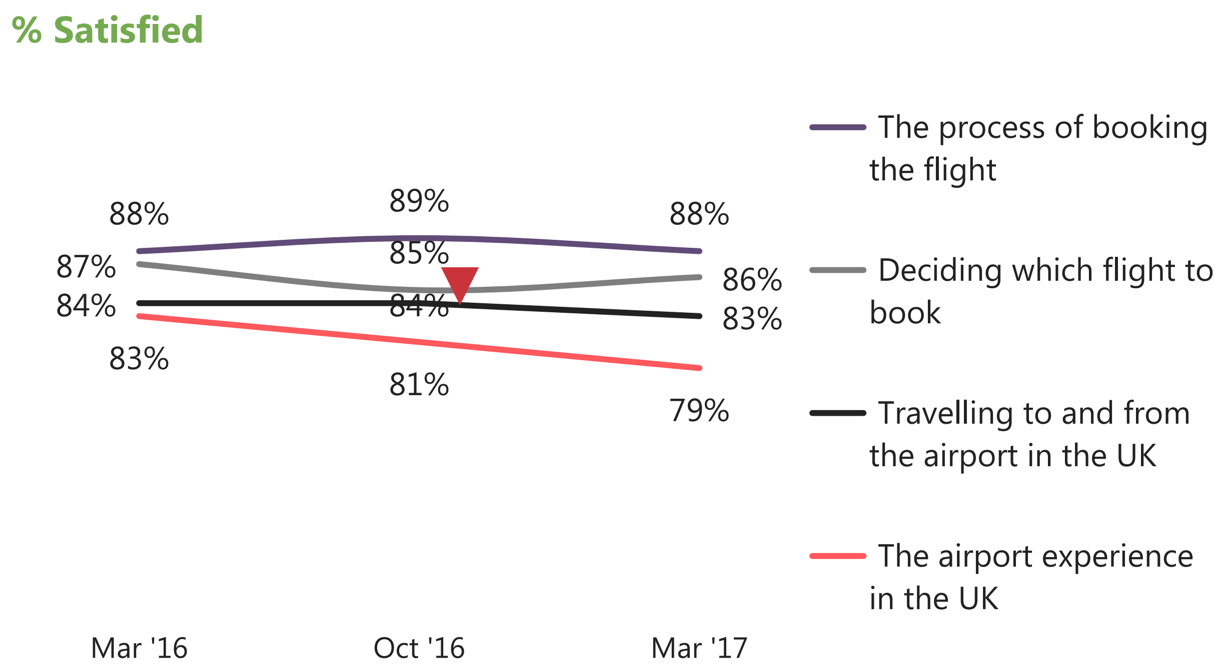
Q61. Now taking all the elements into account, how satisfied or dissatisfied were you with the overall travel experience on this most recent occasion? Base: All who have flown in the last 12 months exc. DK (1,893; sub-groups 57-993).

Civil Aviation Authority

# Last flight: Satisfaction with elements of the journey

Satisfaction across most measures remains high and stable. However, ratings of the airport experience in the UK have dropped significantly compared to March 2016.




The process of booking the flight and deciding which flight to book are both generally rated highly across sub-groups. However, there are some differences, with those who booked online with an airlines slightly but significantly more satisfied (90%). Those who booked with a holiday company are also more satisfied (91%), but this difference is not statistically significant.

Age also appears to have an impact on how the process of booking is rated, with younger consumers slightly less satisfied than older generations, with 85% of 18-24s satisfied compared to 92% of 45-64s.

Ratings of surface access and airport experience drop among business travellers and frequent fliers, indicating that familiarity with the experience makes it more mundane. 80% of frequent fliers, who have flown four or more times in the last year, and 76% of business travellers are satisfied with getting to and from the airport, compared to 87% of those who have flown only once in the last year. Frequent fliers are also less satisfied with the airport experience, with 77% satisfied compared to 83% of those who have flown once in the last year.

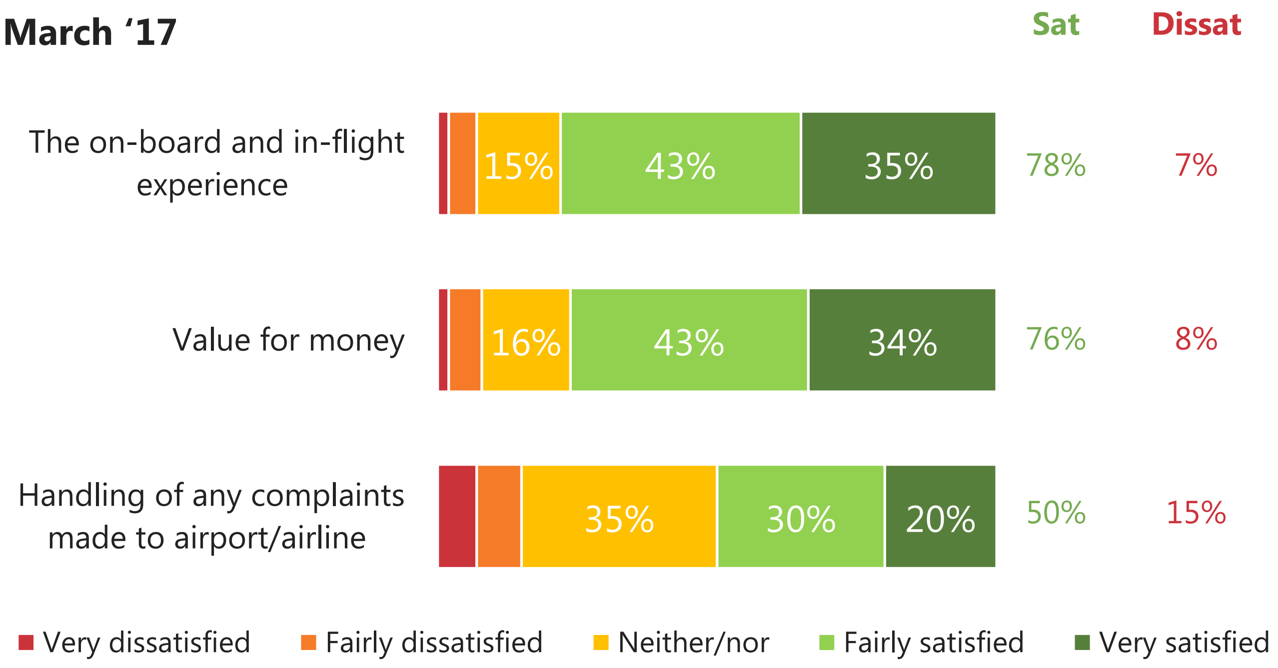
Ipsos Loyalty

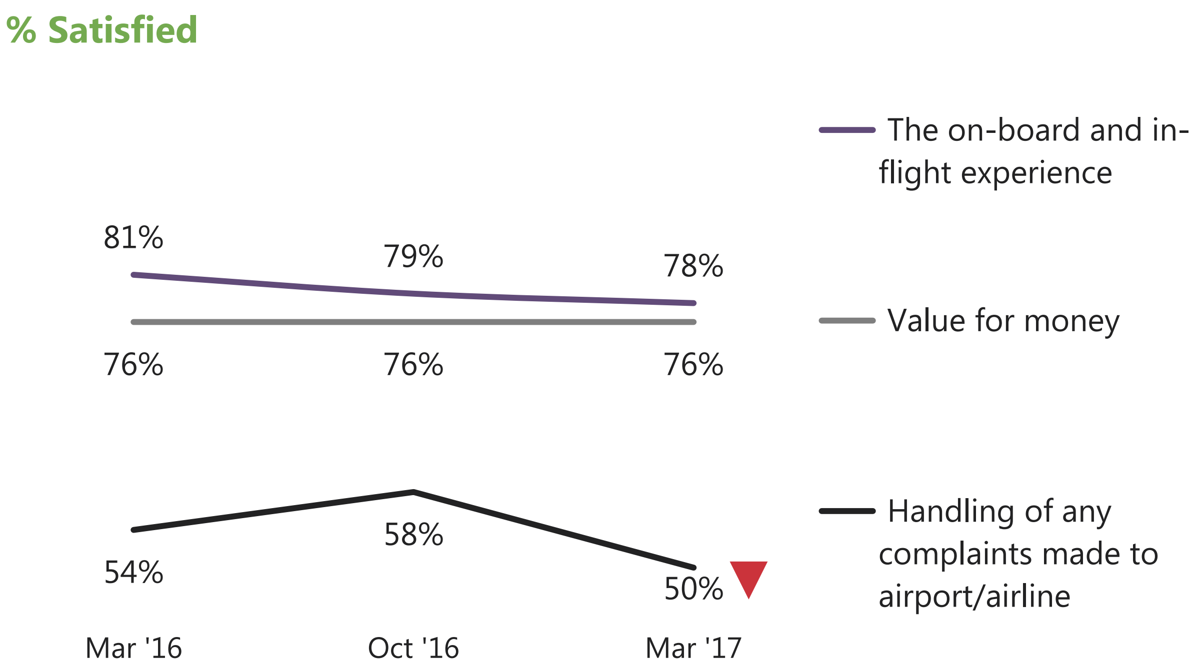
Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK (1784 – 1,890)

Civil Aviation Authority

# Last flight: Satisfaction with elements of the journey

## Satisfaction with the on-board and in-flight experience has dropped slightly, and is significantly lower than in March 2016. Meanwhile, satisfaction with complaint handling has dropped significantly compared to October 2016.




Ratings of on-board and in-flight experience and complaint handling varies across sub-groups, with particular differences between Premium and Standard class consumers emerging.

When it comes to the on-board experience, Premium passengers appear to be more satisfied than Standard passengers, with 84% satisfied compared to 78% in the latter group, however this is not a statistically significant difference. Ratings also differ between long and short-haul fliers. 80% of long-haul fliers are satisfied, compared to 76% of short-haul passengers, reflecting the extra services included in a long-haul flight.

Among those making a complaint, Premium customers rate compliant handling more highly, with 71% satisfied with the outcome of their complaint compared to 50% of Standard customers. Older fliers are also less likely to be satisfied with the handling of their complaint, with only 31% satisfied compared with more than half of complainants aged 18-54.

When consumers face disruption on their journey, satisfaction with value for money falls to 68%. Additionally, business travellers are less satisfied with value for money – only 62% of business travellers are satisfied compared to 77% of non-business travellers.

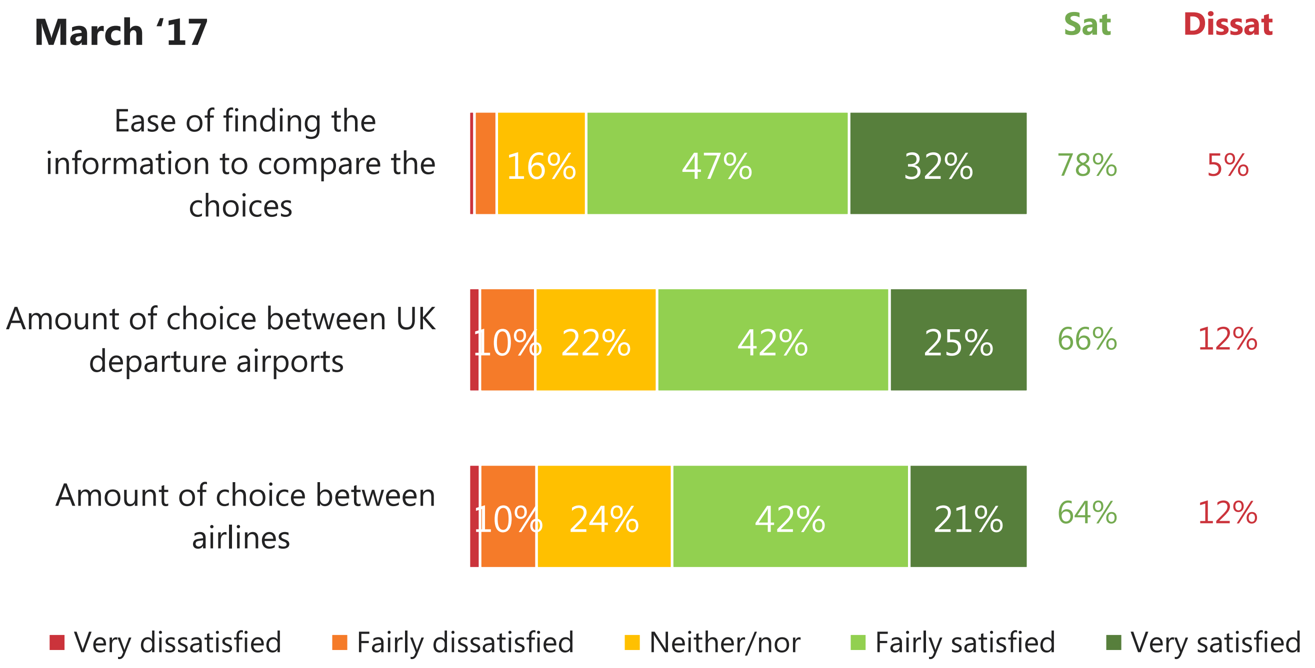
Ipsos Loyalty

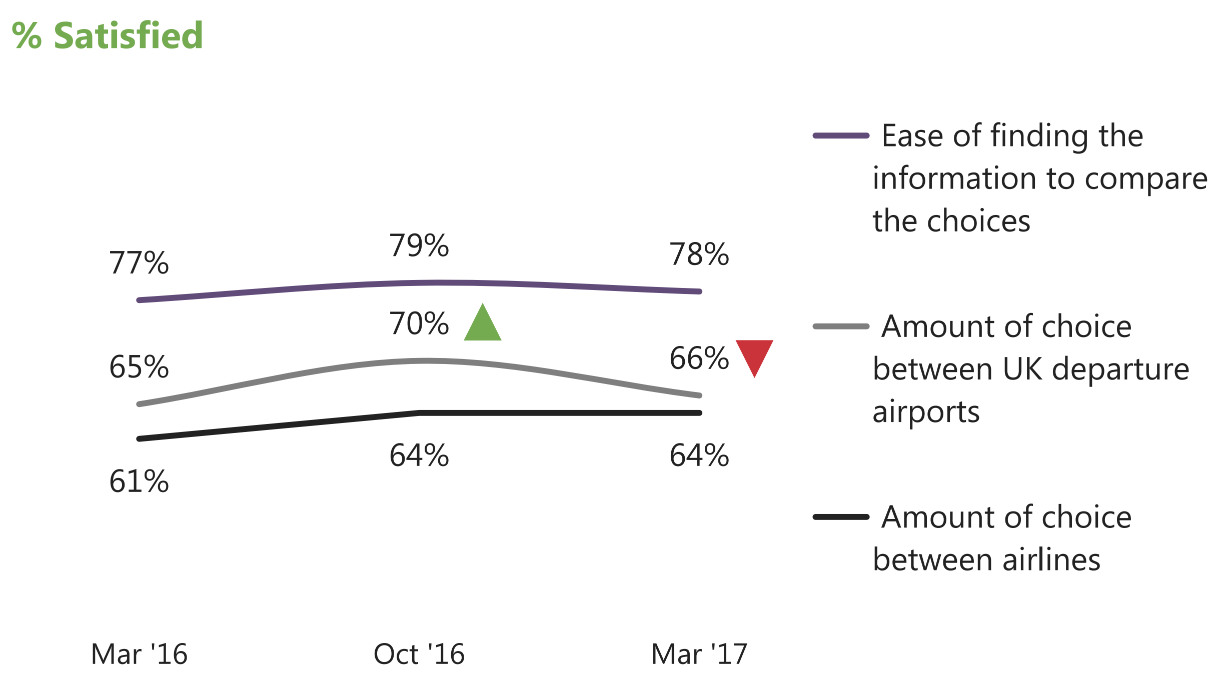
Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK (1,858 - 1,889). All who have flown in the last 12 months and made a complaint exc. DK (516)

Civil Aviation Authority

# Last flight: Satisfaction with elements of pre-booking

Generally, most consumers are satisfied with the ease of finding information to help them compare the choices. When it comes to satisfaction with the options available, ratings of choice between airlines remains consistent, but choice between airports has dropped.




Familiarity means that more frequent fliers are more satisfied with the ease of finding information when comparing choices, with 84% of frequent fliers satisfied with this aspect compared to 76% of those who have flown once in the last year. Long-haul fliers are also more satisfied with choice between airlines (71% satisfied), than those taking short (62%) and mid-haul (60%) flights.

Consumers taking long-haul flights are more satisfied than those taking short-haul flights when it comes to the amount of choice between departure airports, with 71% satisfied compared to 63% in the latter group. This pattern is mirrored when comparing those flying in Premium cabin classes (76% satisfied) to Standard cabin classes (66% satisfied).

Regional differences emerge when comparing satisfaction with choice between UK departure airports. Those in the North East (53% satisfied) and South West (56% satisfied) are the least satisfied, whilst those in the North West (72%) and Yorks and Humber (73%) are the most satisfied.

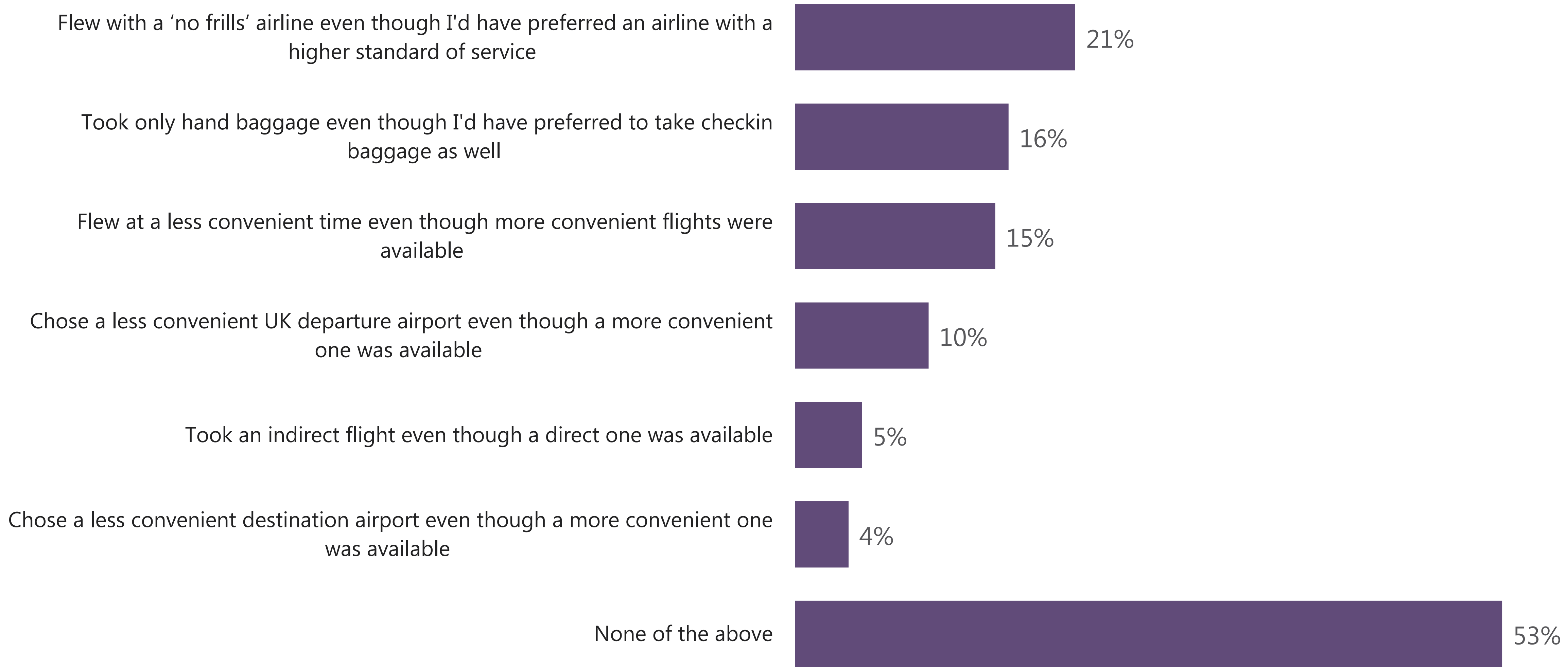
Ipsos Loyalty

Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (1,582 – 1,625)

Civil Aviation Authority

# Value and compromise

When comparing choices, many consumers choose a variety of options to get the best value they can. Flying with a ‘no frills’ airlines is most commonly used, with one in five selecting a low-cost airline when they would have preferred a higher standard of service.



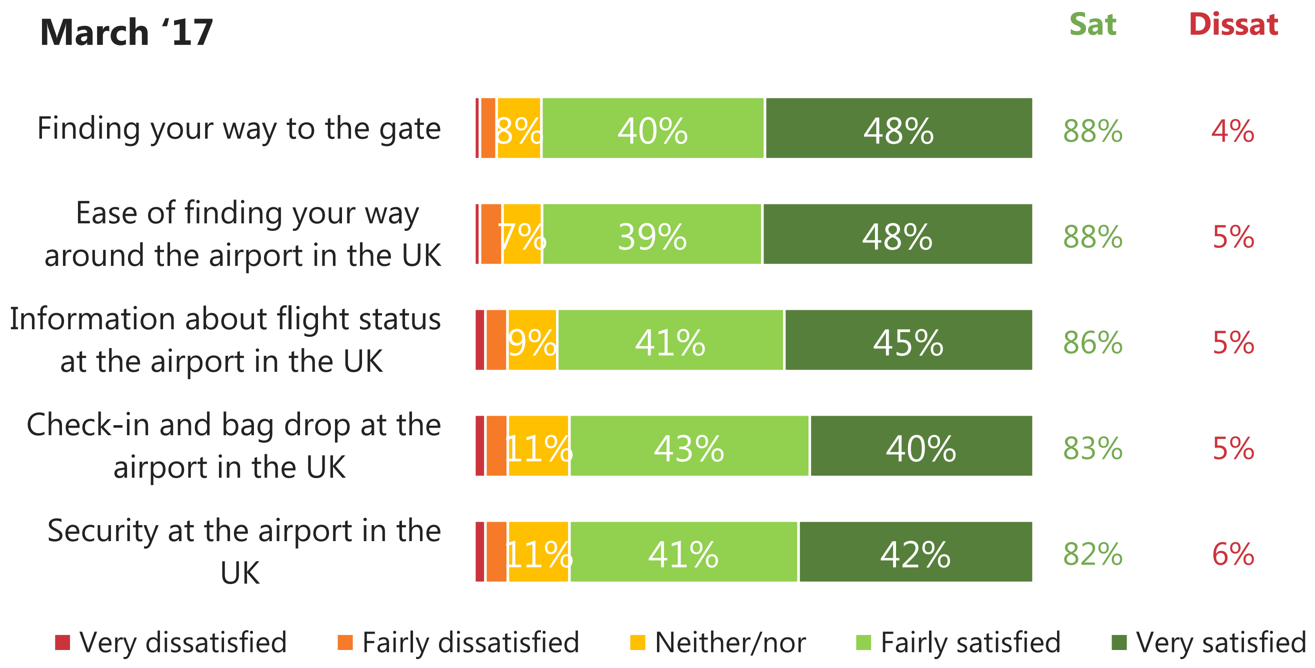

Ipsos Loyalty

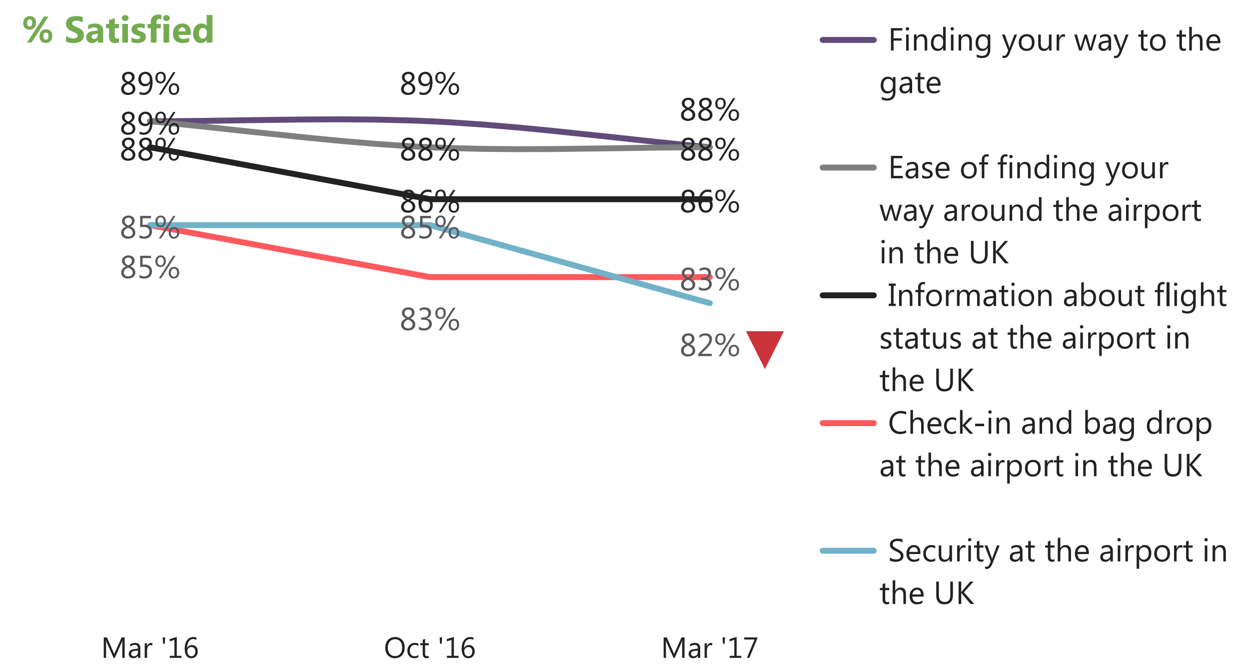
Q53b Still thinking about this most recent flight, did you do any of the following to save money on your trip? Base: All who have flown in the last 12 months (1899)

Civil Aviation Authority

# Last flight: Satisfaction with airport experience

Overall, satisfaction remains consistently high across airport touch-points. However, satisfaction with airport security shows a slight but significant decline since October 2016.




Security appears to be correlated to overall satisfaction, with those 87% of those who are satisfied with their experience overall satisfied with airport security, compared to only 62% of those who were dissatisfied, highlighting the importance of this touchpoint.

Demographic differences emerge, with female consumers are more satisfied with airport security than males (87% compared to 78%). Additionally, older travellers tend more satisfied with security than younger generations, but there is a notable if not statistically significant drop off among the oldest travellers (87% satisfaction among 55-64s compared to 78% among 25-34s and 83% among 65+). This trend that extends to ratings of check-in and bag-drop (82% of 65+ are satisfied, compared to 80% of 18-24s and 87% of 55-64s).

Ratings of security are lower among those travelling with babies (0-2 years old). Only 75% of this group are satisfied with this aspect of their trip. Passport control and immigration also poses a challenge to this group, with satisfaction dropping to 74% for these attributes – an important if not statistically significant finding.

Additionally, those booking with a holiday company are also significantly more satisfied (89%) with this touchpoint than those booking with an airline (81%) and travel agents (82%)

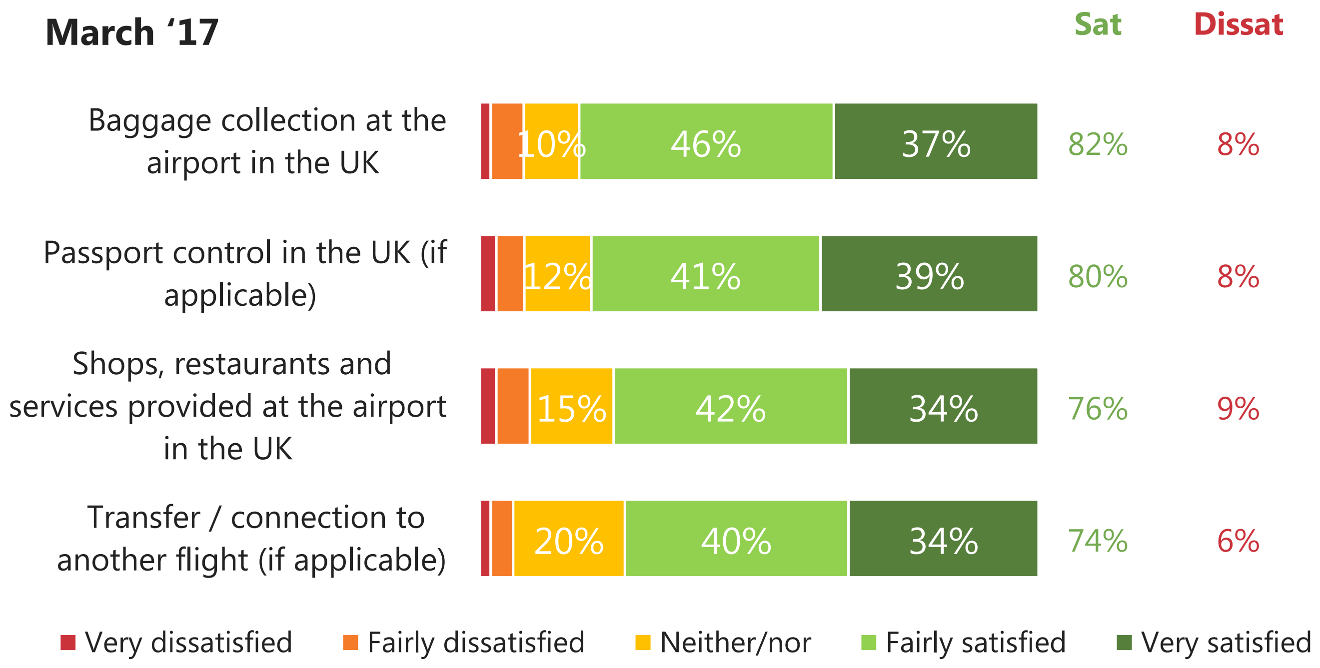
Ipsos Loyalty

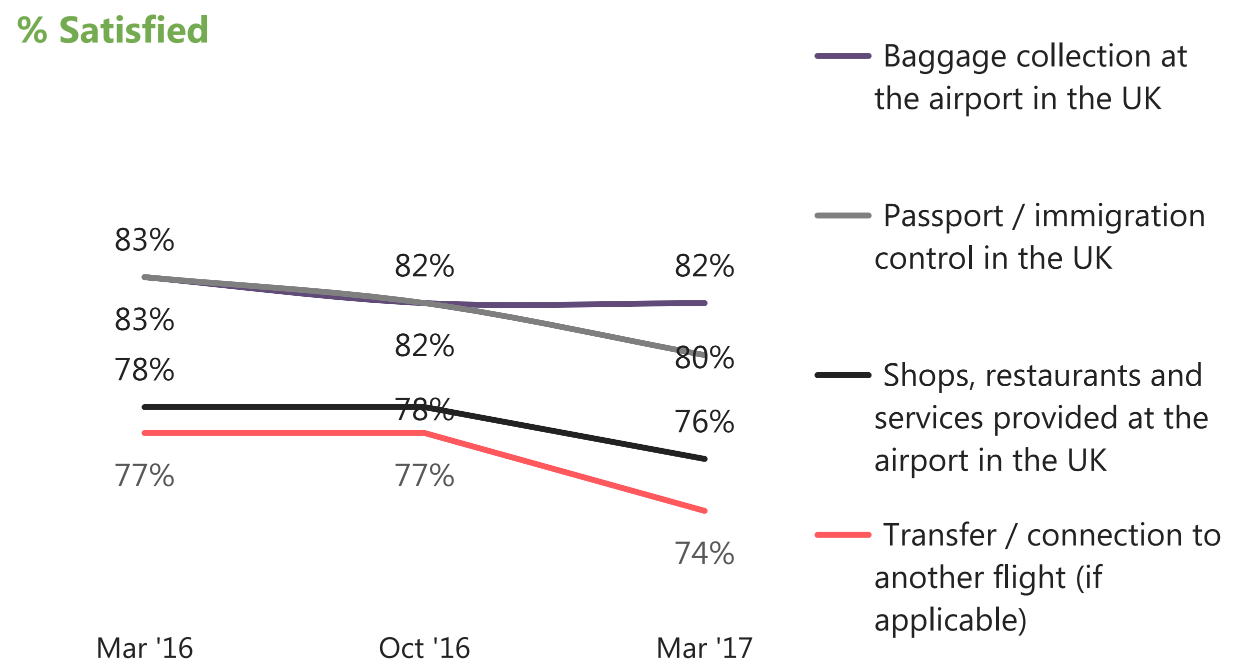
Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (1,837- 1,951)

Civil Aviation Authority

# Last flight: Satisfaction with airport experience

## There has been slight decreases in satisfaction with passport and immigration control in the UK; shops, restaurants and services, and transfers/connections to other flights, but these changes are not statistically significant.




Although three quarters of recent fliers who experienced a transfer to other flights are satisfied with their experience, this remains the lowest rated touchpoint, and is a particular issue for PRM who need assistance (only 55% satisfied). This group is also less satisfied with finding their way to the gate, with 75% satisfied compared to 89% of non-PRM. For those with hidden disabilities, satisfaction with finding the gate drops further to 65%.

Baggage collection is a particular issue for those who required assistance. Satisfaction with this touchpoint among this group is 75%, compared to 83% of those who did not require any assistance on their most recent flight.

Meanwhile, passengers flying in Premium Cabin Classes are more satisfied with transfers than those in Standard Cabin Classes (89% satisfied compared to 74% satisfied). When it comes to shops, restaurants and services at the airport, these passengers are significantly more likely to be 'Very Satisfied' than Standard Passengers (46% compared to 33%).

Ipsos Loyalty

Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (677 - 1,839)

# 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** | 83% | **78%** | 80% | 84% | **88%** |
| **Recent airport experience** | 79% | 77% | **84%** | 77% | **83%** |
| **Value for money** | 76% | 77% | **67%** | 78% | **80%** |
| **Check in and bag drop** | 83% | 82% | **88%** | 82% | 84% |
| **Security** | 82% | 81% | 85% | 81% | 85% |
| **Passport control/immigration** | 80% | 78% | 83% | 78% | 83% |
| **Flight status information** | 86% | 83% | 89% | 85% | 87% |
| **Finding way around airport** | 88% | 90% | 88% | 87% | 91% |
| **Shops and restaurants** | 76% | 76% | 80% | 75% | 75% |
| **Finding way to gate** | 88% | 86% | 92% | 87% | 89% |
| **Transfer/connection to another flight** | 74% | 70%** | 78% | 72% | 80% |
| **Baggage collection** | 82% | 80% | 84% | 80% | **86%** |

| 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: 1576-1890, Gatwick: 270-332, Heathrow: 302-332, Other large airports: 265-324, Other airports: 250-321), except 'Transfer/connection to another flight (Overall: 677, Gatwick: 87*, Heathrow: 135, Other large airports: 137, Other airports: 102),

Ipsos Loyalty

Civil Aviation Authority

# Understanding dissatisfaction with travel experience

## Poor service and communication contribute to dissatisfaction.

I paid extra for priority boarding but this was not in place at XXXXXX although it was fine at XXXXXXX.  We complained to the staff on board and also to the company (XXXXX) but received no apology, refund or compensation which makes me wonder whether it is worth paying the extra. Its not the first time this has happened at XXXXX with XXXXXX.

My allocated seating was scattered all over the plane despite travelling with children. I tried to let the airline know before travelling but we had to wait until we were on board the plan to sort it out. We were relying on other passengers not turning up in order to have seats moved so I could sit with my children.”

The seats were the most uncomfortable I've ever flown on! There was very limited space, even to put the tray table down. Also, the frequency of the trollies being wheeled up and down the aisle offering refreshments was quite irritating.”

Flying economy means passengers are treated like cattle.  Along with diminishing customer service there aren't enough seats in departure lounges.  As a result we have stopped flying and now travel by car and ferry.

My return flight was delayed and then cancelled. I was getting occasional emails with information that was not on the departure board, and our flight eventually disappeared from it altogether. We ended up finding out it was cancelled from a fellow passenger and were put up in a hotel for the night.”

I almost always have to endure long periods (2 hours at the airport, plus 7 or 8 hours flight time, then transfer time) with no food as airports (often) and airlines (always-100%) cannot provide suitable food for my medical requirements.”

We had a 24 hour delay and now we’ve had involve our solicitors to try and get any compensation as the airline is refusing to pay out.”

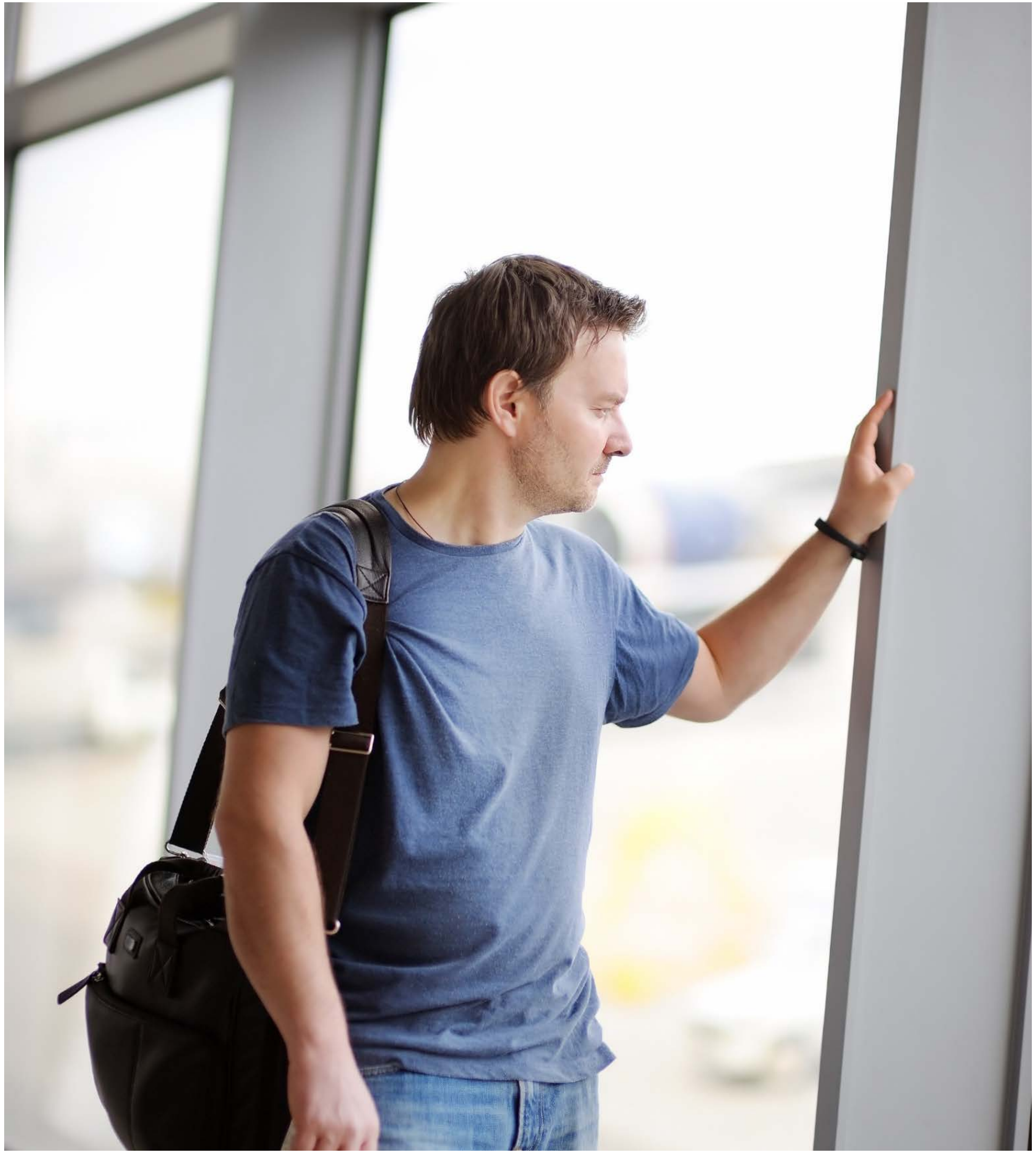
Ipsos Loyalty

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

Civil Aviation Authority

# Disruption and complaint handling

Ipsos Loyalty



# Disruption and complaint handling - summary

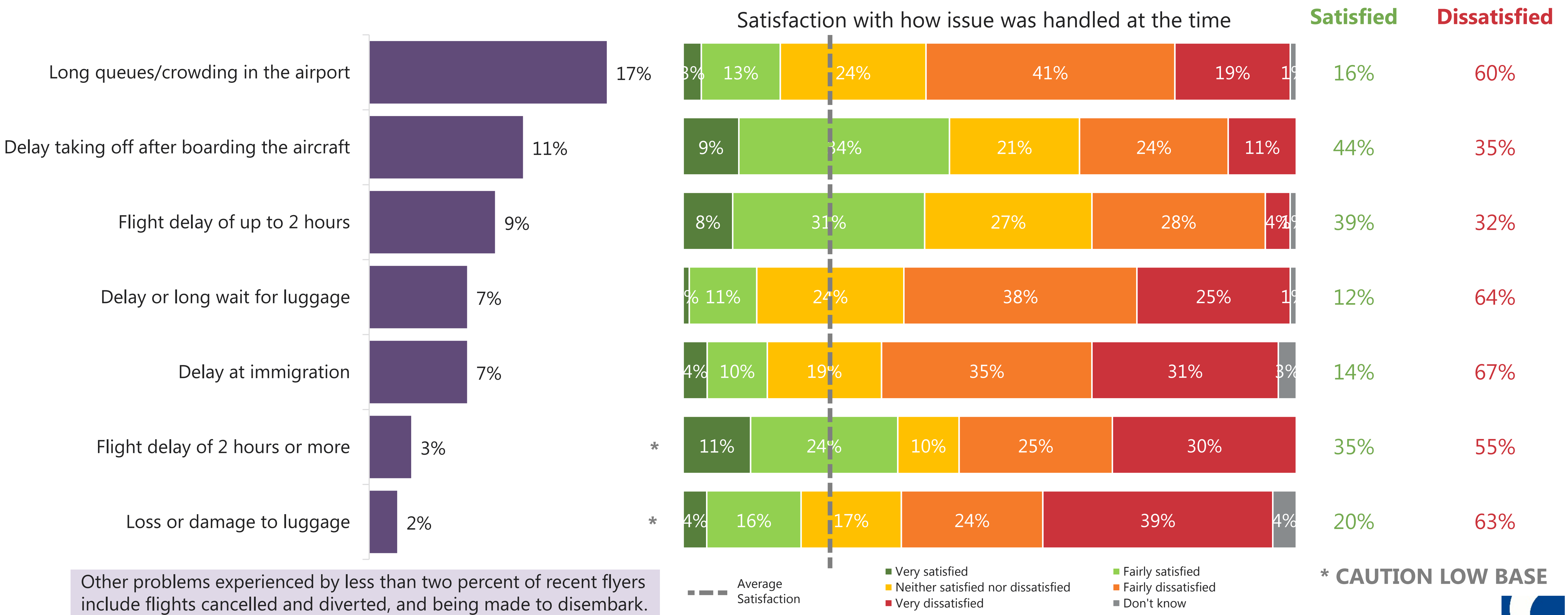
**The biggest cause of disruption is long queues and overcrowding at the airport. Lack of arrangements for customers during delays causes the greatest dissatisfaction. Satisfaction with aspects of problem handling is typically low, however, the majority of complaints are not escalated further.**

- **Three in ten (31%) of those who experienced disruption are unaware of the cause of the disruption.**
  - The most common types of disruption experienced were long queues at the airport (17%), a delay taking off after boarding the flight (11%) and flight delay of up to two hours (9%).
- **Satisfaction with types of disruption is mixed, though fewer than half are satisfied across all types measured.**
  - The highest rates of dissatisfaction with disruption occur when there is a delay or long wait collecting luggage (64%) or delays at immigration (67%). Customers felt that delays taking off after boarding (44%) and delays of more than 2 hours (35%) were handled most satisfactorily.
  - Satisfaction with the extent to which the effects of disruption where mitigated (information and updates provided, arrangements made to look after passengers, the outcome of complaints), with between three in ten and four in ten dissatisfied with these aspects.
  - When looking at experiences of disruption, dissatisfaction is also quite low (36% are dissatisfied with arrangements made to look after passengers, 35% are dissatisfied with information and updates provided and 31% are dissatisfied with the outcome of any complaints), although the majority of complaints (83%) are not escalated to a third party as part of an alternative dispute resolution (ADR).
  - Only 27% of customers felt satisfied with the outcome of a complaint made to the airport, airline or holiday company. Despite this, a large number did not escalate their complaint to a third party. Among those who did escalate their complaint to a third party, including the CAA's Passenger Advice and Complaints Team, satisfaction with the outcome is much higher, with over half (55%) very or fairly satisfied.

Ipsos Loyalty

# Last flight: Travel disruption

Long queues and crowding in the airport are the most commonly experienced forms of disruption, with three in five travellers dissatisfied with how this is handled. Traveller dissatisfaction is highest with delays at immigration and long waits when collecting luggage.




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

Ipsos Ipsos Loyalty

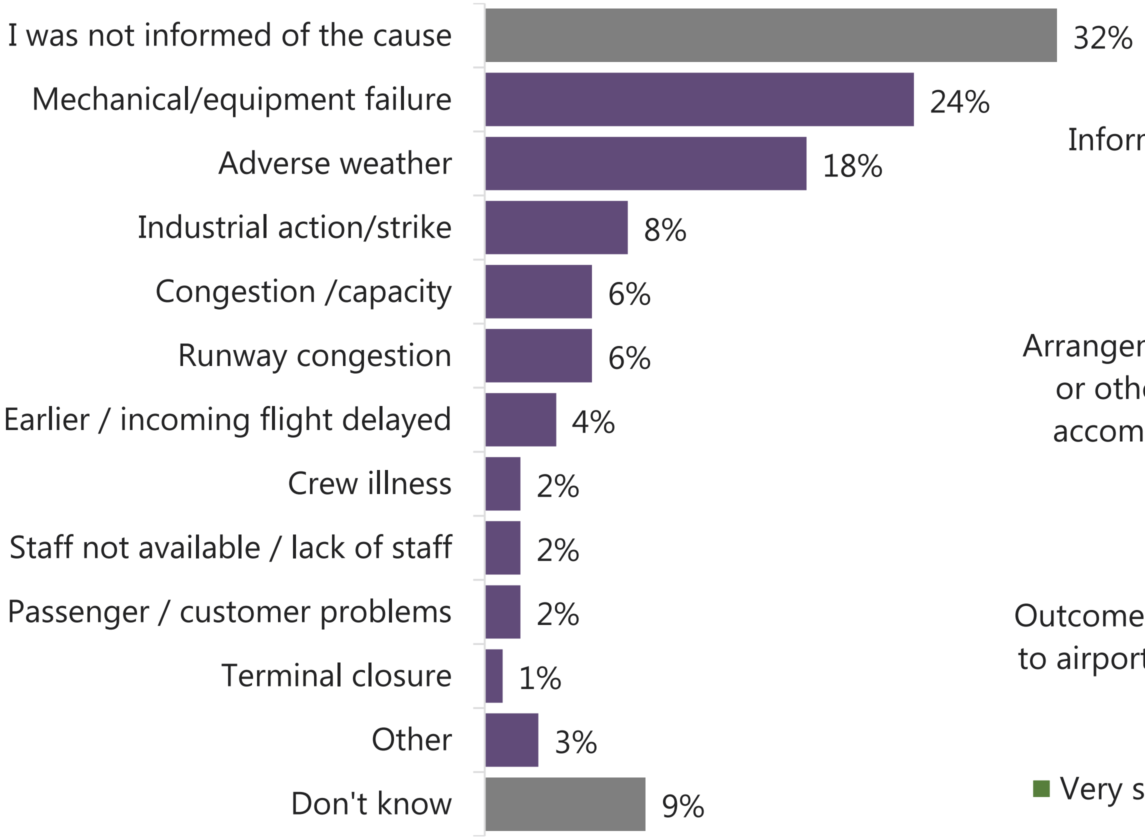
Q80. During the most recent journey, did you experience any of the following types of travel problem? Base: All who have flown in the last 12 months (1,988) | Q81. Satisfaction with the handling of each travel problem. Base: All who have flown in the last 12 months and experienced a travel problem (41-316)

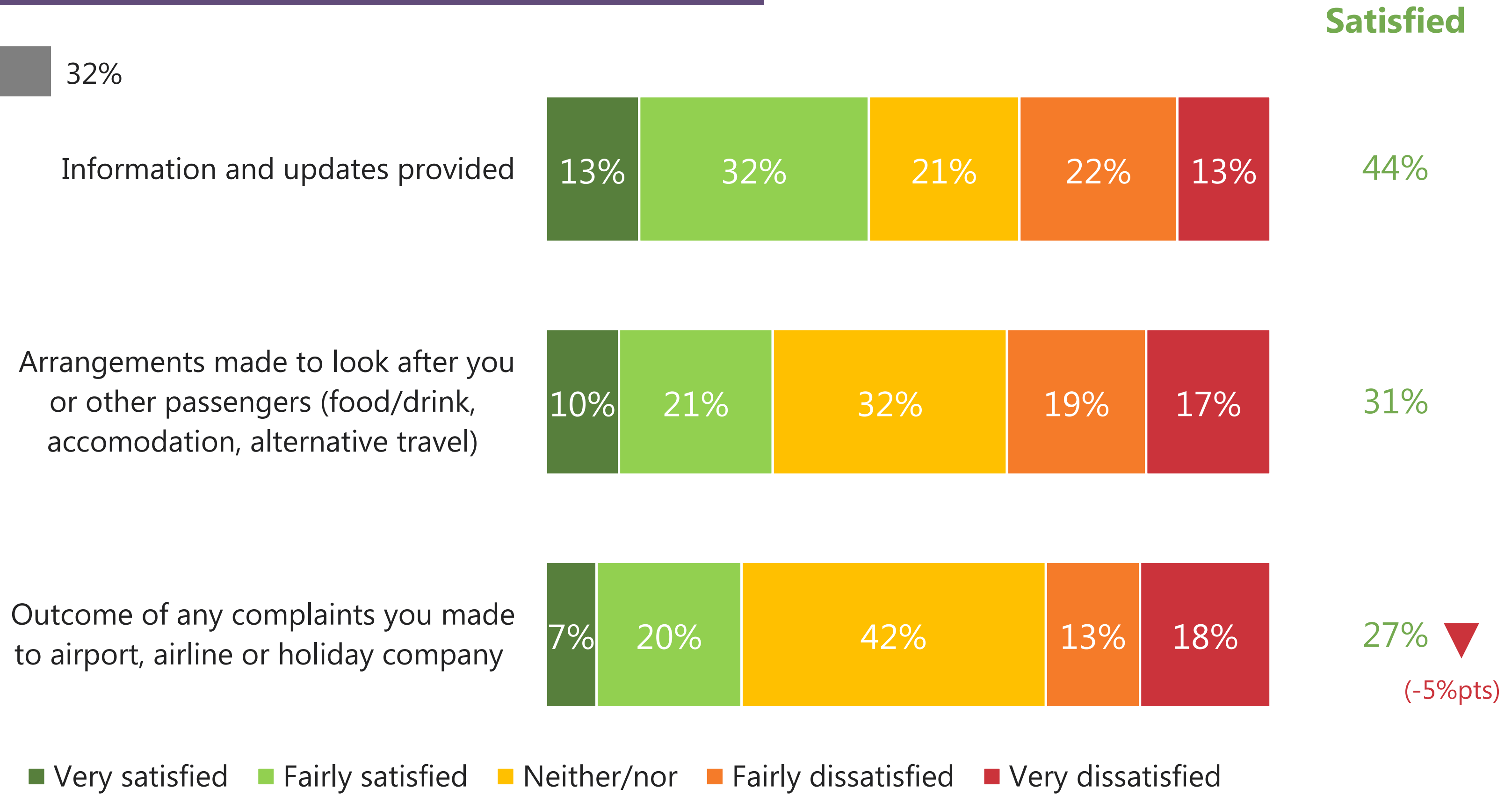
Civil Aviation Authority

# Last flight: Travel disruption

Almost one third of passengers experiencing disruption are not informed of the cause, and less than half are satisfied with information and updates provided. Significantly fewer passengers were satisfied by the outcome of any complaints made.

## Causes of disruption and satisfaction with problem handling



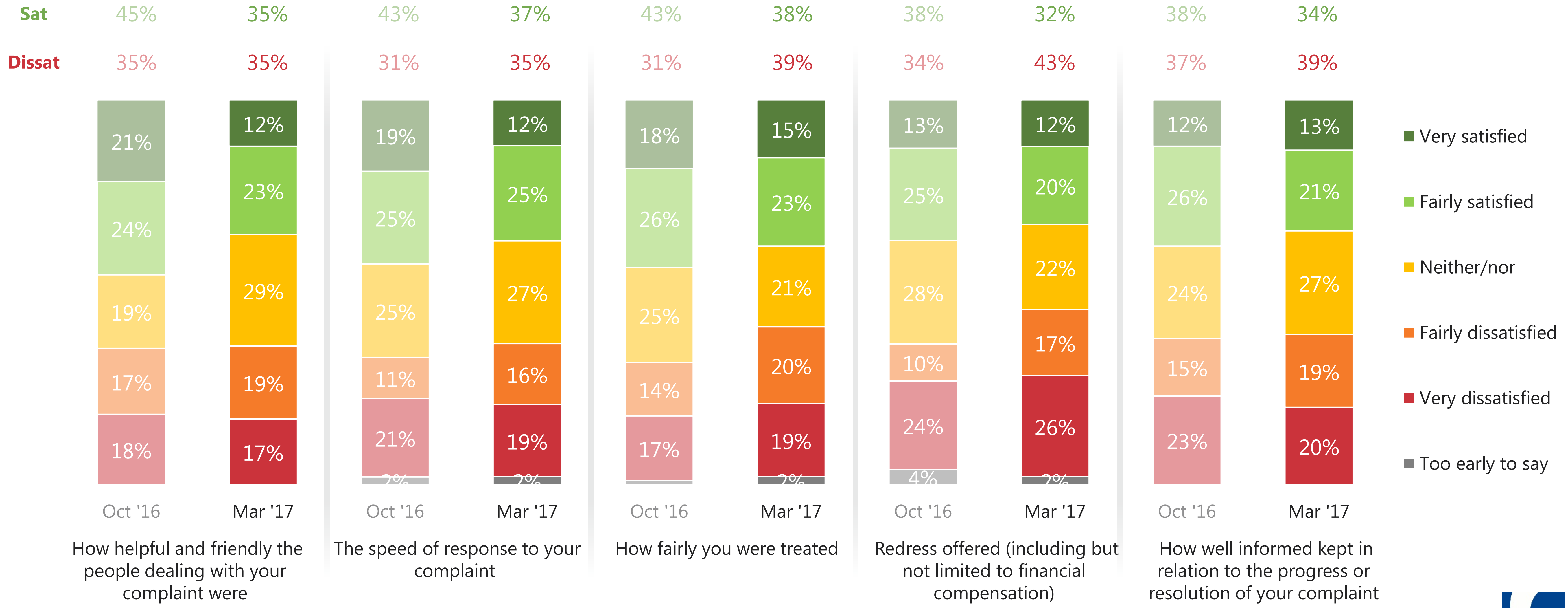

Ipsos Loyalty

Q80b. What was the cause of the delay to your recent flight? Base: All who have flown experienced disruption on last flight (230) | Q83. How satisfied or dissatisfied were you with the following aspects in terms of your flight problem? Base: All who have flown in the last 12 months and experienced any travel problem exc. DK (282-656)

Civil Aviation Authority

# Satisfaction with complaint handling aspects

Levels of satisfaction decreased across all aspects of the complaint handling process, with peak satisfaction achieved when considering fairness. The redress offered proved most dissatisfying to complainants.




Ipsos Loyalty

Q84. Thinking more specifically about any complaints you made to the airport, airline or holiday company about the travel issue, how satisfied or dissatisfied were with the following aspects? Base: All participants who experienced a travel problem and commented about their complaint (177-196)

# Understanding dissatisfaction with handling of problems

A lack of communication is a key cause of dissatisfaction amongst those experience disruption. Long waits, luggage problems, staff and a perception that nothing was  being done about the problem also proved popular sources of dissatisfaction.

There was no information given and we were all just left to stand in a queue at the departure gate."

My companion's luggage wasn't put on the flight and he wasn't given any immediate compensation so we spent the first few hours of our holiday trying to find him clothes to buy.  It also took ages to establish what was happening at the airport, even with several different parties affected."

If there is a delay I would prefer to be left in the airport rather than boarded. Passengers are stuck waiting while problem is fixed, adding an extra hour of being cooped up and unable to move around/stretch our legs. Not everyone on the flight may have been comfortable flying so for them this would cause stress and discomfort."

I was told that the airline didn't cater for 'retards'."

Nothing was done - just huge queues that took forever to be dealt with - this makes the experience very uncomfortable and stressful - it definitely puts me off flying."

There are always delays at immigration wherever one is in the world. What is always irritating is that there are always empty immigration desks, with just a few staff working a small number of the available desks and very few of the biometric scanner lanes open."

We waited on the plane for an hour before being told that plane's battery needed to charge so the engines could be started. Firstly, this should not be problem for an airline and secondly, we should have been told why we were delayed, earlier."

Ipsos Loyalty

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

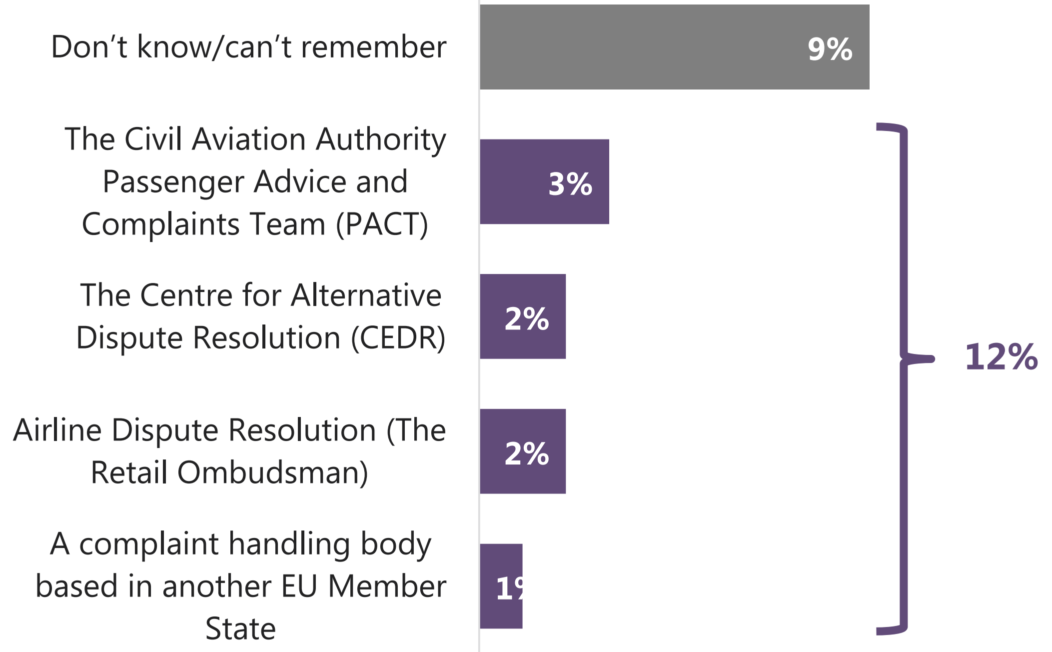
Civil Aviation Authority

# ADR complaint handling

The vast majority did not escalate their complaint to a third party. However, this does not mean that complainants were satisfied with the outcome of their complaints: three in ten remain dissatisfied. Those escalating their complaint were more satisfied with how it was handled.

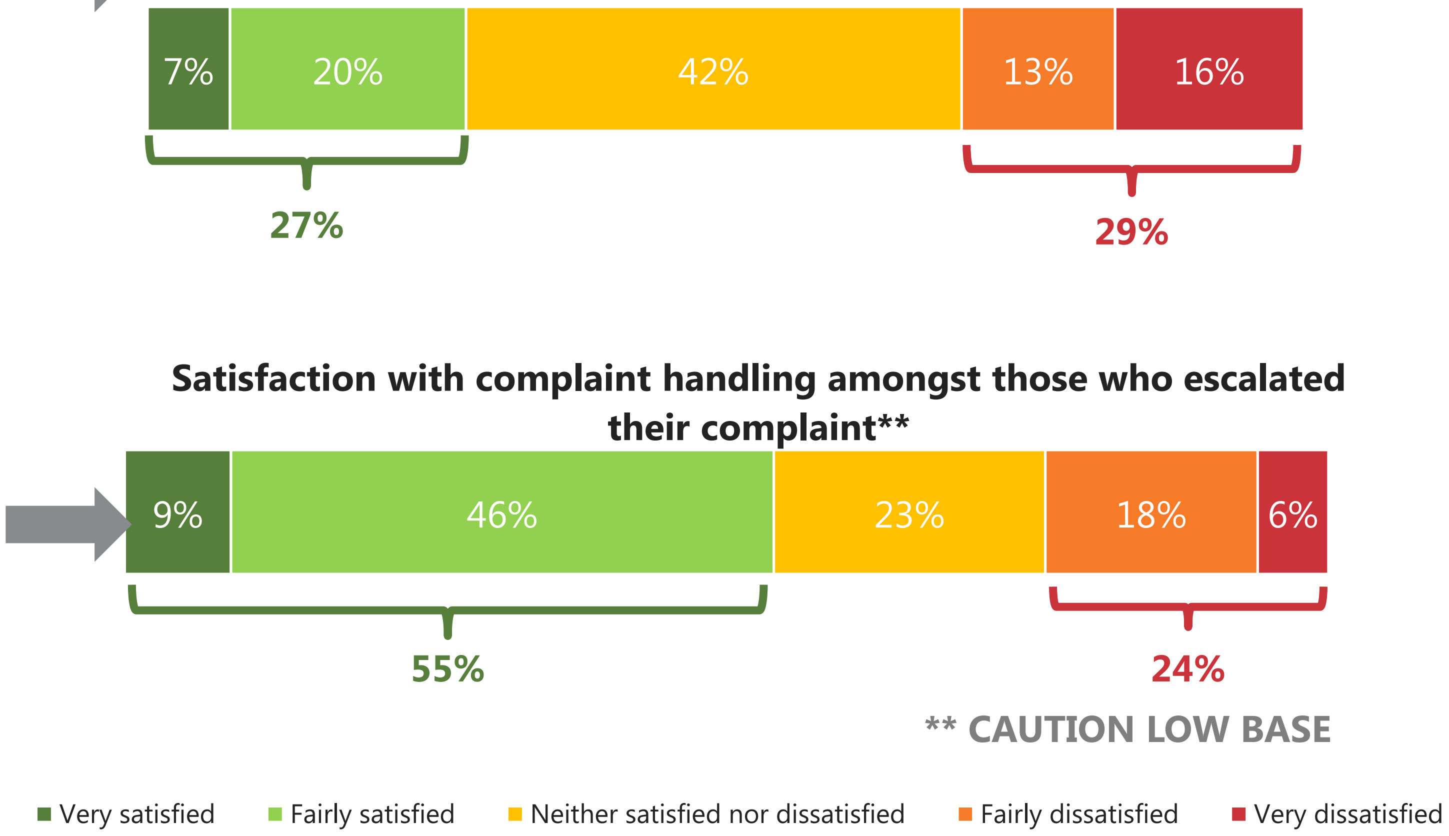
**83%** did not escalate to any other organisation

**% escalating complaint to third party**




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

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




** CAUTION LOW BASE

Ipsos Loyalty

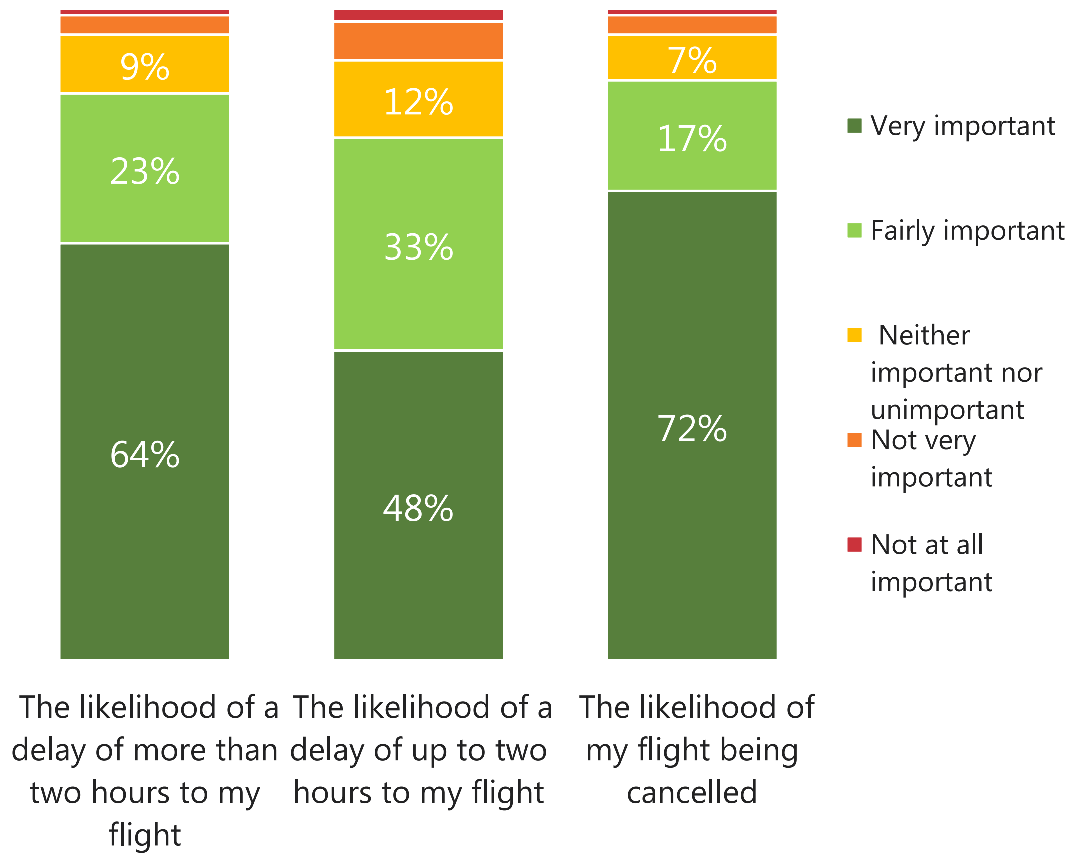
Q83d. How satisfied or dissatisfied were you with the following aspects in terms of your flight problem? Base: Flyers who complained to their airline, airport or holiday company but did not escalate it to a third party (282); Q85. Did you escalate your complaint or problem to any of the following organisations following after your recent flight experience? Base: All participants who commented about complaint (282); 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 (22** CAUTION LOW BASE)

Civil Aviation Authority

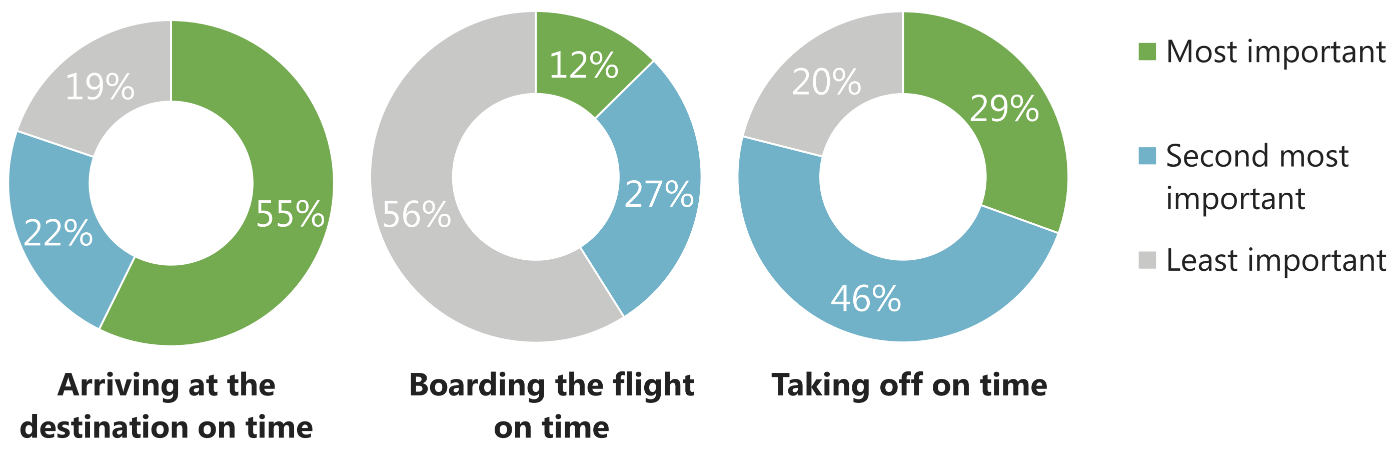
# Customer Information

Information about disruption to flight plans has great importance to customers, although information about short delays was viewed slightly less critically. Passengers care most about arriving at their destination on time, but also value a punctual take off time.

## Importance of knowing the following while booking your flight…?




## Importance of journey factors




Q160. We'd now like you to think about the next time you take a trip similar to your most recent, where you flew from (airport from Q53), for (reason for flight from Q52b). When in the process of booking your flight for this trip, how important is knowing about each of the following? Base: All who have flown in the last year (1,902) | Q161 I'm now going to read out some statements that I'd like you to rank in order of importance. Still thinking of a trip similar to your most recent one, which of the following factors are most important? Base: All who have flown in the past year (1902).

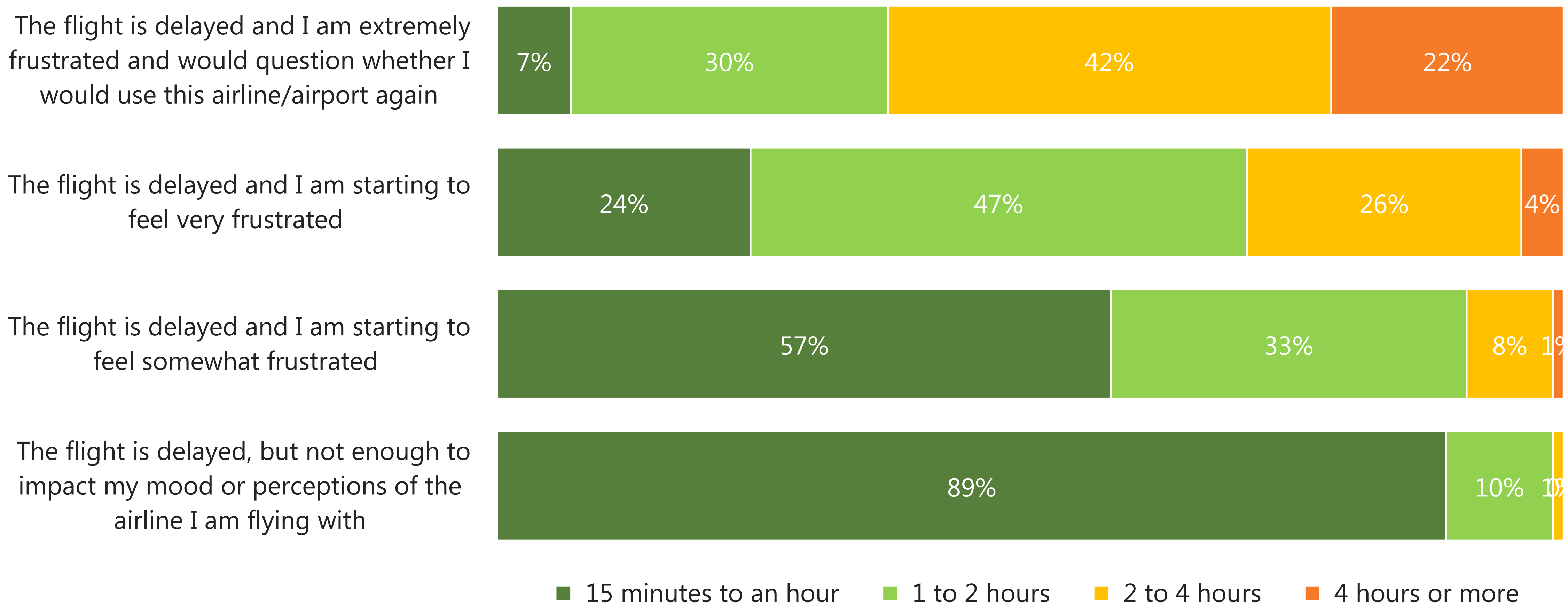
Ipsos Loyalty

Civil Aviation Authority

# Flight delays

Longer delays result in a greater level of frustration. Passengers are reasonably tolerant of delays under 2 hours although half of passengers said a delay of 1 to 2 hours would be very frustrating and a third said it would make them question using the airline or airport again.

How late would you flight have to arrive at your destination for you to feel the following…

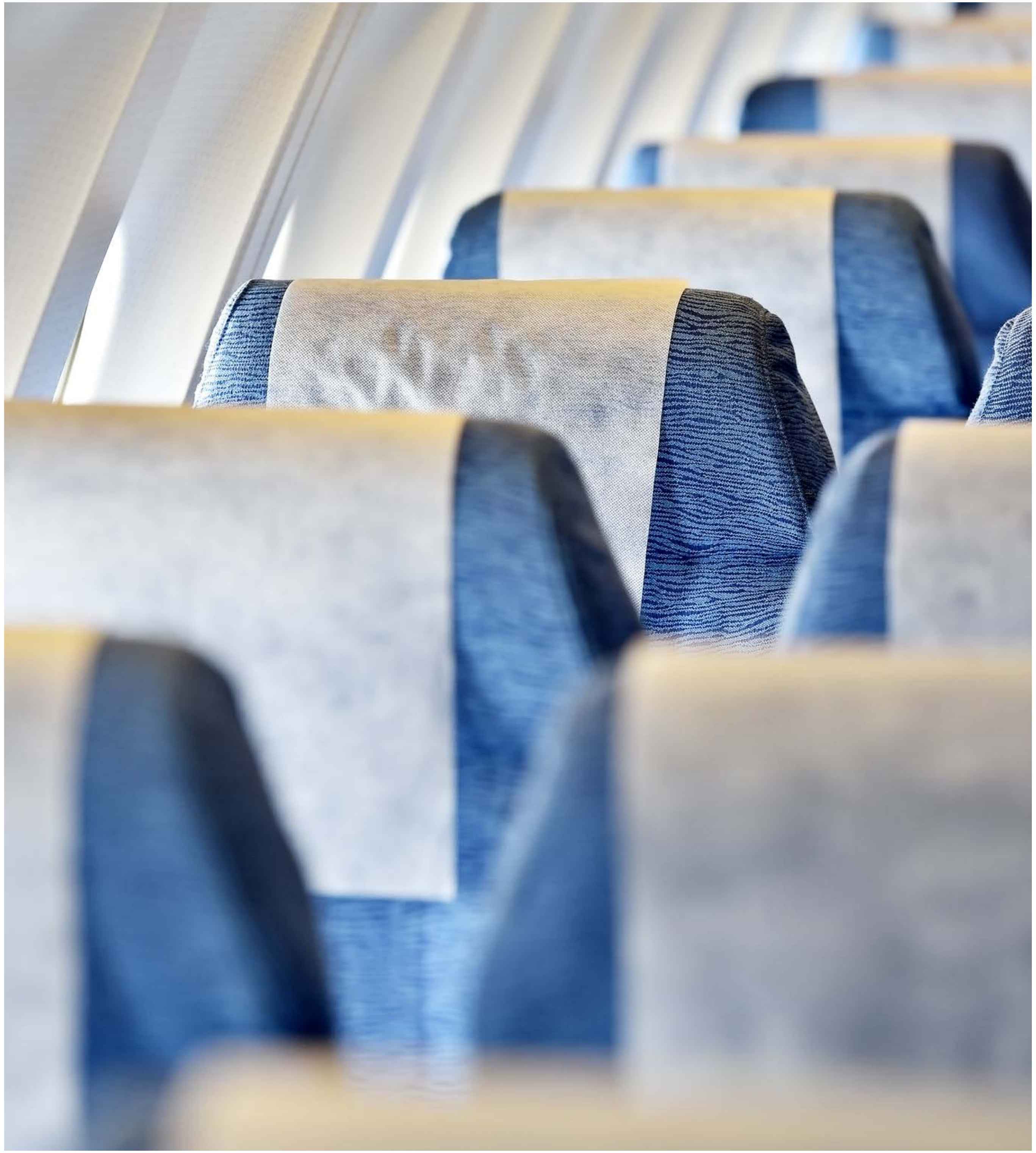



Ipsos Loyalty

Q162. Again, thinking of a trip similar to your most recent one, how late would a flight have to arrive at your destination for you to feel each of the following. Base: All who have flown in the last year (1560).

# Experience of PRM

Ipsos Loyalty



# Experience of PRM - summary

**Disabilities and health conditions continue to act as barriers that prevent PRM flying. Among those who do fly, satisfaction with the airport experience is lower than among non-PRM. Assistance provided is rated highly, but awareness is limited among PRM.**

- **Half of PRM believe that their disability makes flying difficult, and this impacts their likelihood to have flown in the last year. Many state that their disability is the reason they have not flown in the last year.**
    - A much lower proportion of PRM have flown in the last year (34%) compared to non-PRM (58%). For PRM, the most recent flight experience is more likely to be more than four years ago, and the proportion of PRM who have never flown is more than double the number of non-PRM who have never flown (11% compared to 4%).
    - Disability is raised as a specific factor for one third of PRM who have not flown in the last year in their decision not to travel by air.
- **Satisfaction with the overall airport experience is lower among PRM, with 73% satisfied compared to 80% of non-PRM. More specific touchpoints also show a significant difference, including security, navigation and handling of complaints.**
    - Ratings of security have drop to 77% satisfied among PRM compared to 83% of non-PRM. Navigability in the form of finding their way around the airport and finding their way to gate shows a similar difference between the two groups. The proportion of PRM dissatisfied with complaint-handling is double that among non-PRM (29% of PRM are dissatisfied compared to 14% of non-PRM).
- **Assistance is generally rated highly, with more than half stating that they were 'Very Satisfied' with the assistance they received overall, but awareness is limited and many do not feel well informed about assistance available.**
    - One third of those receiving assistance were first time-users. Although not a statistically significant difference, those who had used assistance previously are less satisfied with their most recent experience than first time users. For this group, their most recent experience is broadly representative of their experiences overall.
    - PRM are divided in terms of how well informed they feel about assistance. Two in five believe they are well informed and three in five are not well informed. However, only one in ten state that they are well informed about assistance available.
    - When choosing airports for their next flight, almost half of PRM (48%) would choose the airport based on the quality of assistance provided. This rises to 56% among those with air travel difficulties and 60% of those who require assistance.

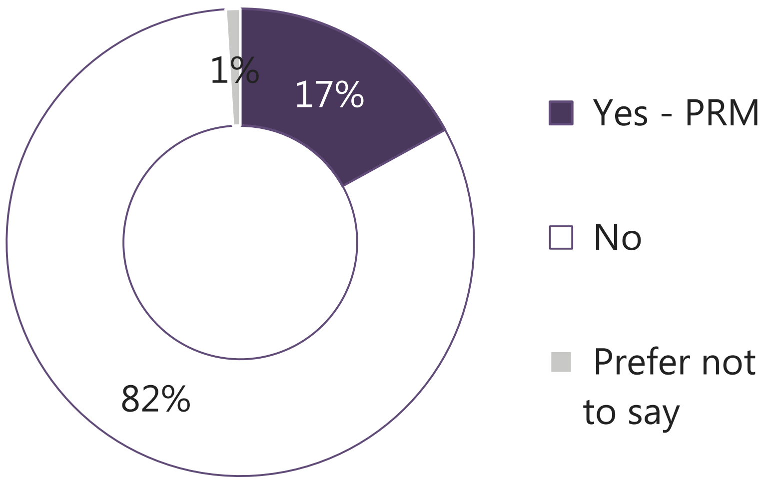
Ipsos Loyalty

Civil Aviation Authority

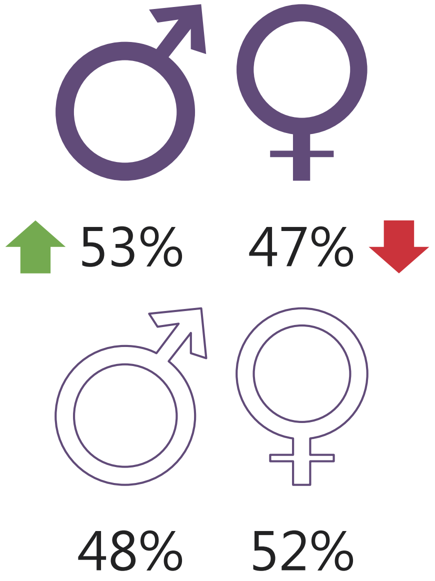
# PRM profile

PRM have an older age profile than non-PRM and are also slightly more likely to be male.

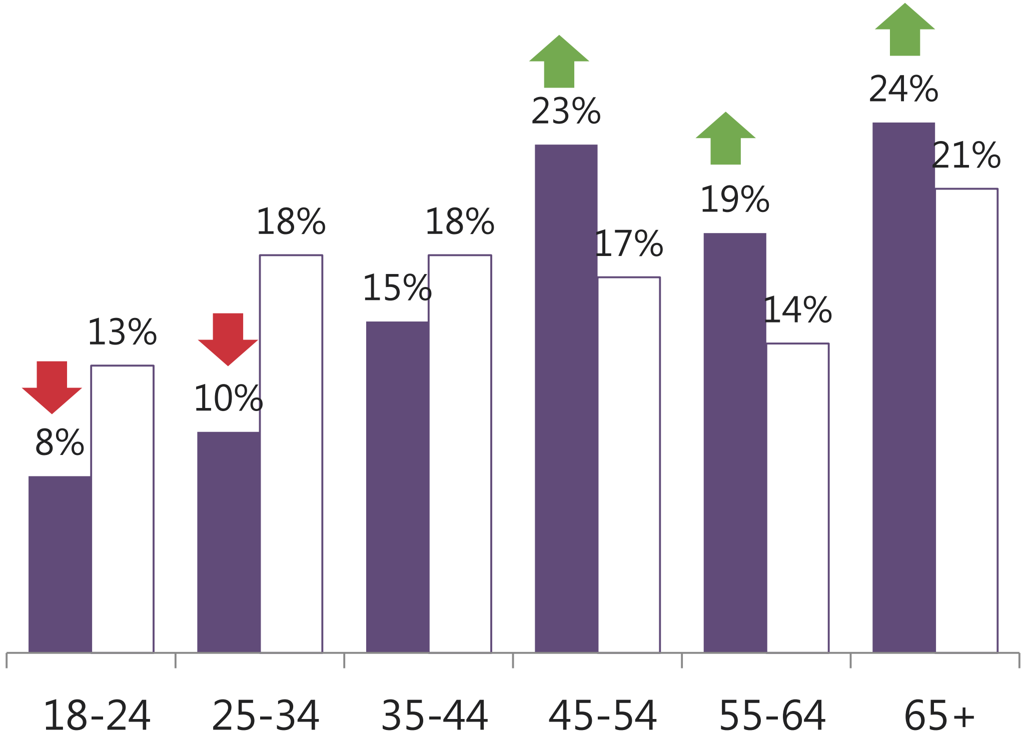
Disability or health condition?




Gender




Age




PRM Non-PRM

= significant difference v Non-PRM

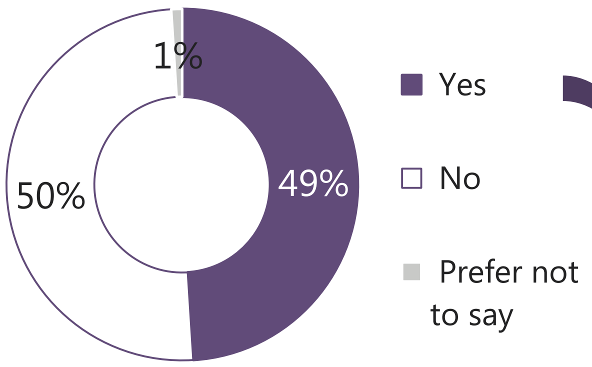
Ipsos Loyalty

Q30. Do you have any disability/health condition that limits your day-to-day activities? Base: All (3,502) | Q1. Gender, Q2. Age. Base: PRM (585), non-PRM (2,872)

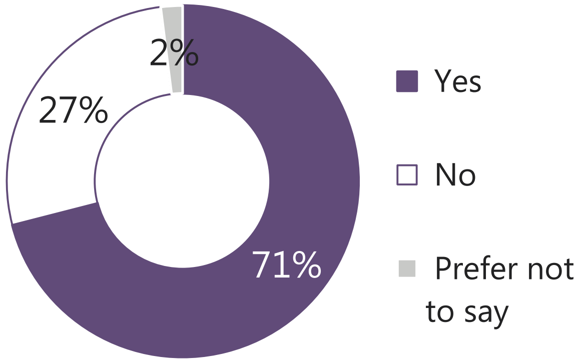
# PRM profile

Half of PRM say their disability or health condition makes flying difficult; seven in ten of these would need assistance when taking a flight.

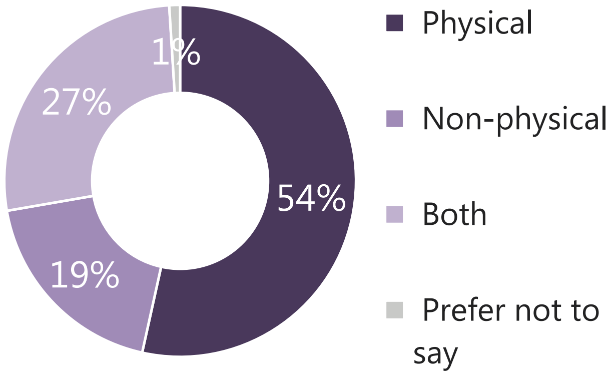
Does/would disability or health condition make airports/flying difficult?



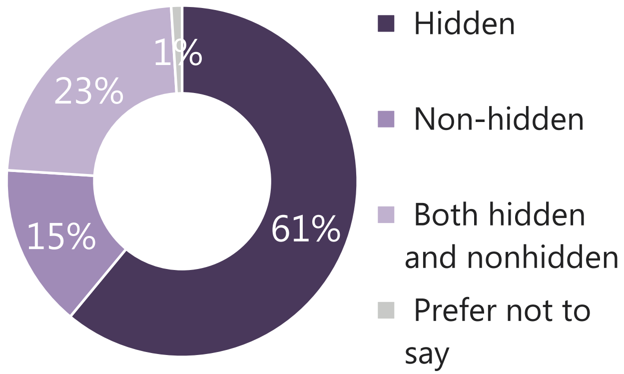

Disability or health condition means assistance would be needed when taking a flight




Is disability physical/non-physical or both?




Is disability hidden/non-hidden or both?




**Type of disability among PRM**

| | Hidden | Non-hidden | Both hidden and non-hidden |
|---|---|---|---|
| Physical | 32% | 12% | 9% |
| Non-physical | 15% | 2% | 1% |
| Both physical and non-physical | 13% | 1% | 12% |

Ipsos Loyalty

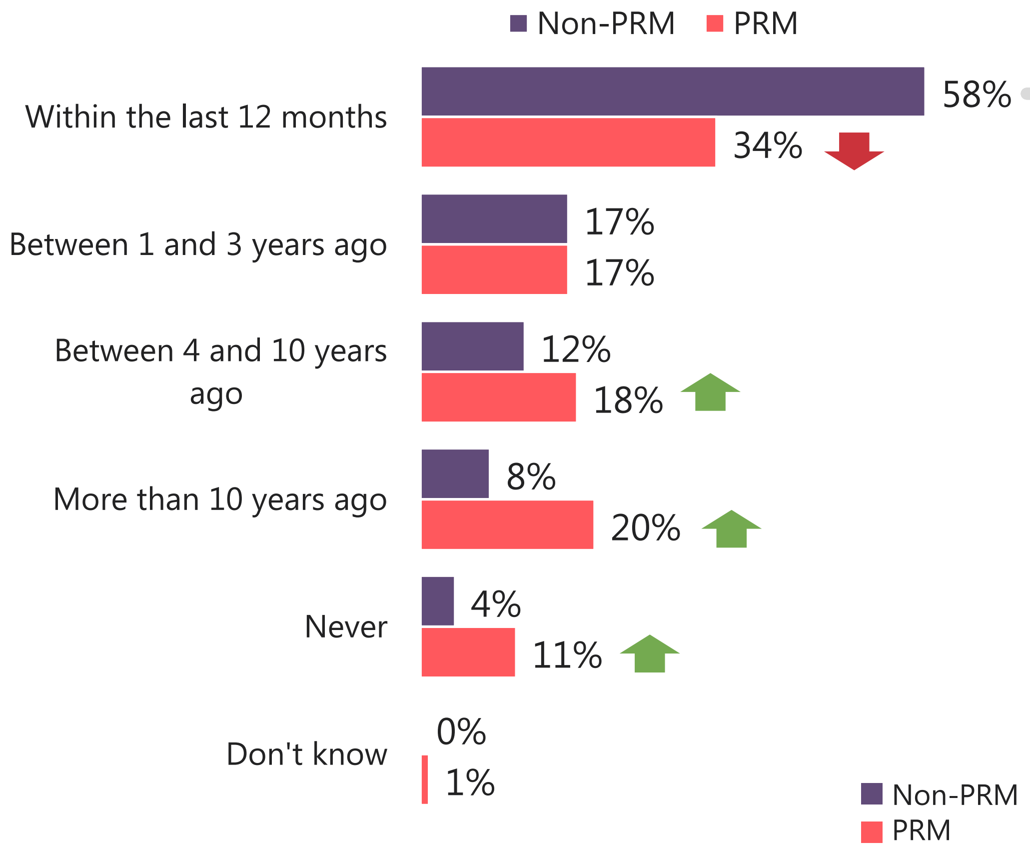
Q31. Does/would your disability make accessing/using airports/flying difficult? Base: All PRM (585) | Q32. Would you classify your disability as physical/non- physical/both? Base: All PRM (online participants only, 534) | Q32b. Would you classify your disability as hidden/non-hidden/both/both? Base: All PRM (online participants only, 534) | 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 (284)

Civil Aviation Authority

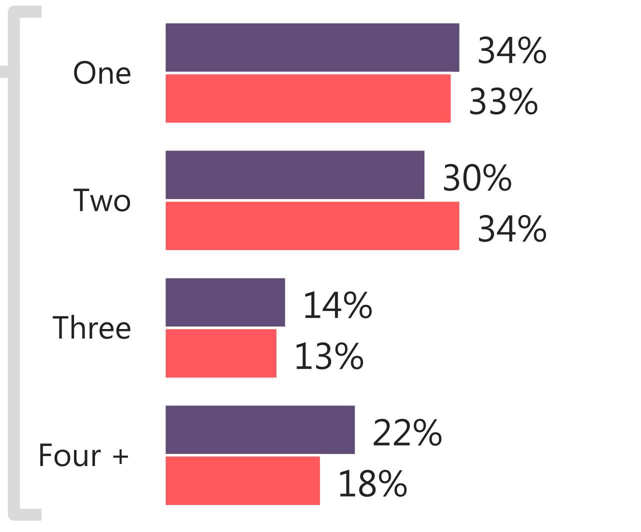
# PRM: Flying behaviour overview

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. However, differences between PRM and non-PRM recent fliers are less pronounced.

## Last flown from a UK airport

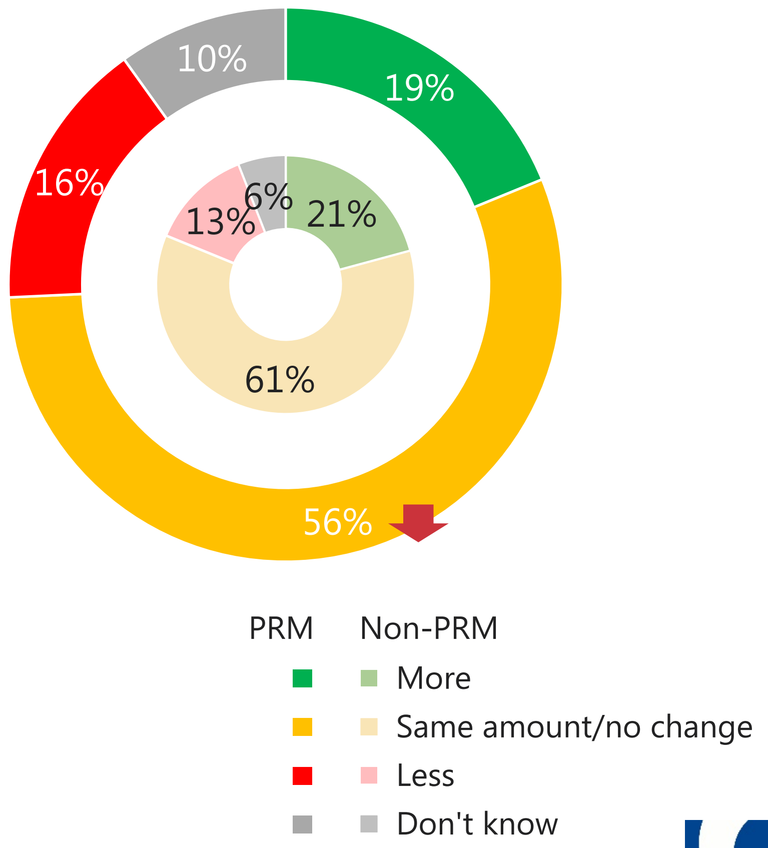



## Flights in last 12 months




= significant difference v non-PRM

## Flying frequency in next 12 months




Ipsos Loyalty

Q10. When was the last time you flew from a UK airport? Q13. In the next 12 months, do you expect that you will fly more, the same amount or less compared to now? Base: PRM (585), Non-PRM (2872). Q11. How many trips have you made by air in the last 12 months? Base: PRM (198), Non-PRM (1685).

# 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 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 | 34% | 17% | 18% | 20% | 11% |
| Physical | 34% | 17% | 17% | 21% | 10% |
| Non-physical | 32% | 15% | 13% ↓ | 25% ↑ | 15% ↑ |
| Physical & require assistance | 29% | 15% | 22% | 24% | 9% |
| Non-physical & need assistance* | 19% ↓ | 9% | 13% | 33% ↑ | 25% ↑ |
| Hidden | 34% | 17% | 17% | 20% | 11% |
| Non-hidden | 28% | 12% ↓ | 20% | 25% ↑ | 13% |
| Hidden & require assistance | 24% ↓ | 15% | 20% | 25% | 14% |
| Non-hidden & need assistance | 28% | 11% | 22% | 26% | 11% |

↑ ↓ = significant difference v PRM

* CAUTION LOW BASE

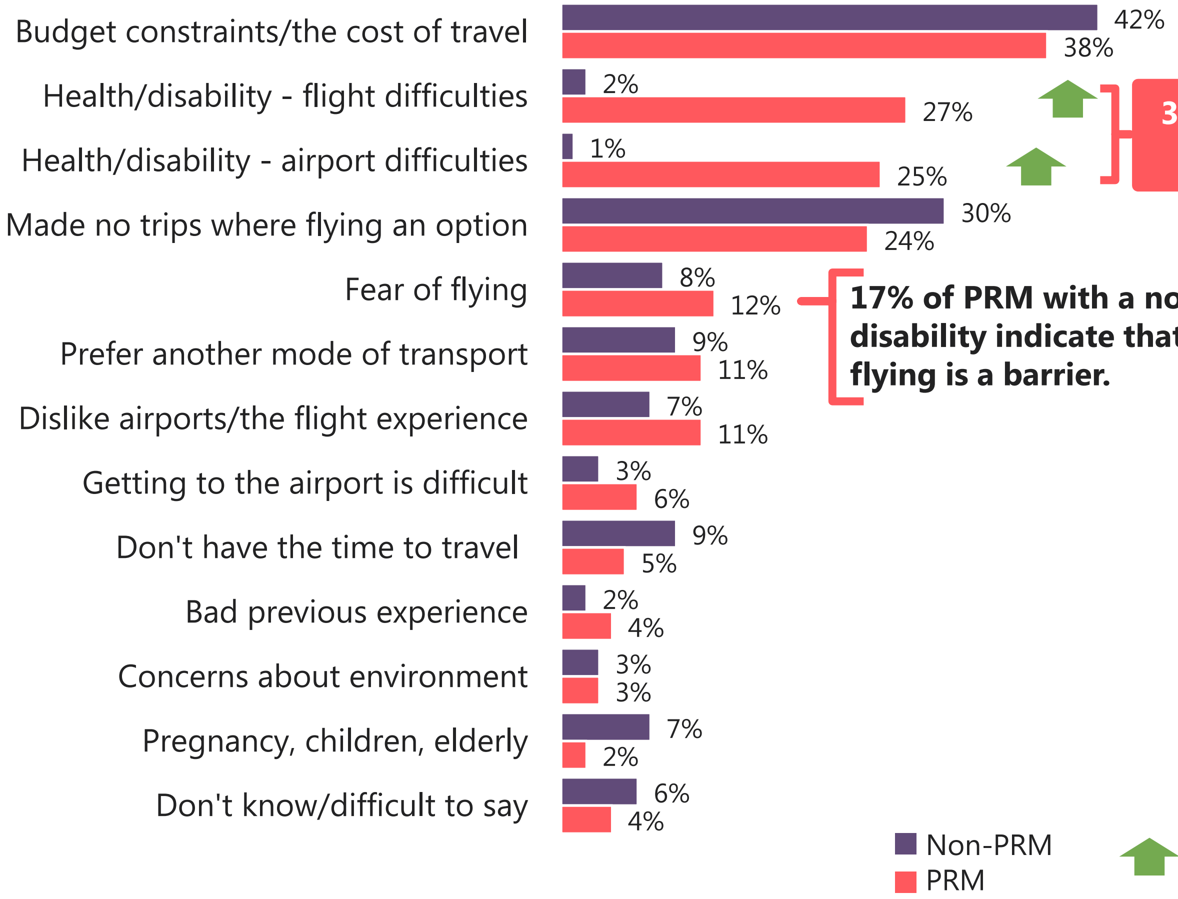
Ipsos Loyalty

Q10. When was the last time you flew from a UK airport? Base: PRM (585), non-PRM (2,872), physical (430), non-physical (241), physical and require assistance (166), non-physical and require assistance (69), hidden (446), non-hidden (202), hidden and require assistance (131), non-hidden and require assistance (108)

# PRM: Flying behaviour overview

Health is cited by more than one third of PRM as a barrier to flying. This is a particular issue for those who believe their disability makes air travel difficult and those who need assistance, highlighting the challenge among some PRM.

**Barriers to flying**
(Mentions above 2%)




**34% of PRM mention health/ disability, consistent with previous waves.**

**57% of PRM who need assistance with flying, 55% with air travel difficulties and 41% of those with non-hidden disabilities identify health as a reason they have not travelled by air in the last year.**

**17% of PRM with a non-physical disability indicate that a fear of flying is a barrier.**

= significant difference v non-PRM

Ipsos Loyalty

Q20. Why have you not flown? Base : All who have not flown in the last 12 months. Non-PRM (1,187), PRM (387).

Civil Aviation Authority

# PRM: Barriers to Flying by segment

Significant difference vs PRM

## Barriers to flying (Mentions by PRM above 5%)

| | 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 | 38% | 36% | 43% | 30% | 37% | 44% | 36% | 40% | 29% |
| Health/disability - flight difficulties | 27% | 27% | 28% | 47% | 52% | 25% | 33% | 47% | 50% |
| Health/disability - airport difficulties | 25% | 27% | 26% | 47% | 45% | 25% | 33% | 47% | 49% |
| Made no trips where flying an option | 24% | 26% | 27% | 19% | 18% | 28% | 25% | 20% | 15% |
| Fear of flying | 12% | 12% | 17% | 13% | 27% | 12% | 12% | 15% | 13% |
| Prefer other mode of transport | 11% | 12% | 10% | 10% | 14% | 12% | 12% | 12% | 15% |
| Dislike airports/flight experience | 11% | 11% | 12% | 13% | 18% | 13% | 10% | 17% | 12% |
| Getting to the airport is difficult | 6% | 7% | 6% | 11% | 9% | 6% | 10% | 12% | 13% |
| Don't have time to travel | 5% | 5% | 7% | 4% | 4% | 5% | 6% | 4% | 4% |

* CAUTION LOW BASE

Ipsos Loyalty

Q20. Why have you not flown? Base not flown in the last 12 months: PRM (387), physical disability (284), non-physical disability (165), physical disability requiring assistance (118) and non-physical disability requiring assistance (56*), hidden (294), non-hidden (145), hidden disability requiring assistance (99*) and non-hidden disability requiring assistance (78*)

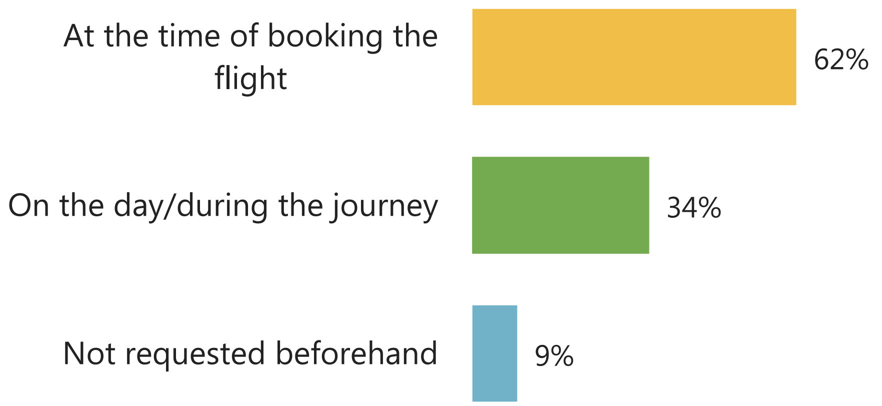
Civil Aviation Authority

# Satisfaction with assistance received

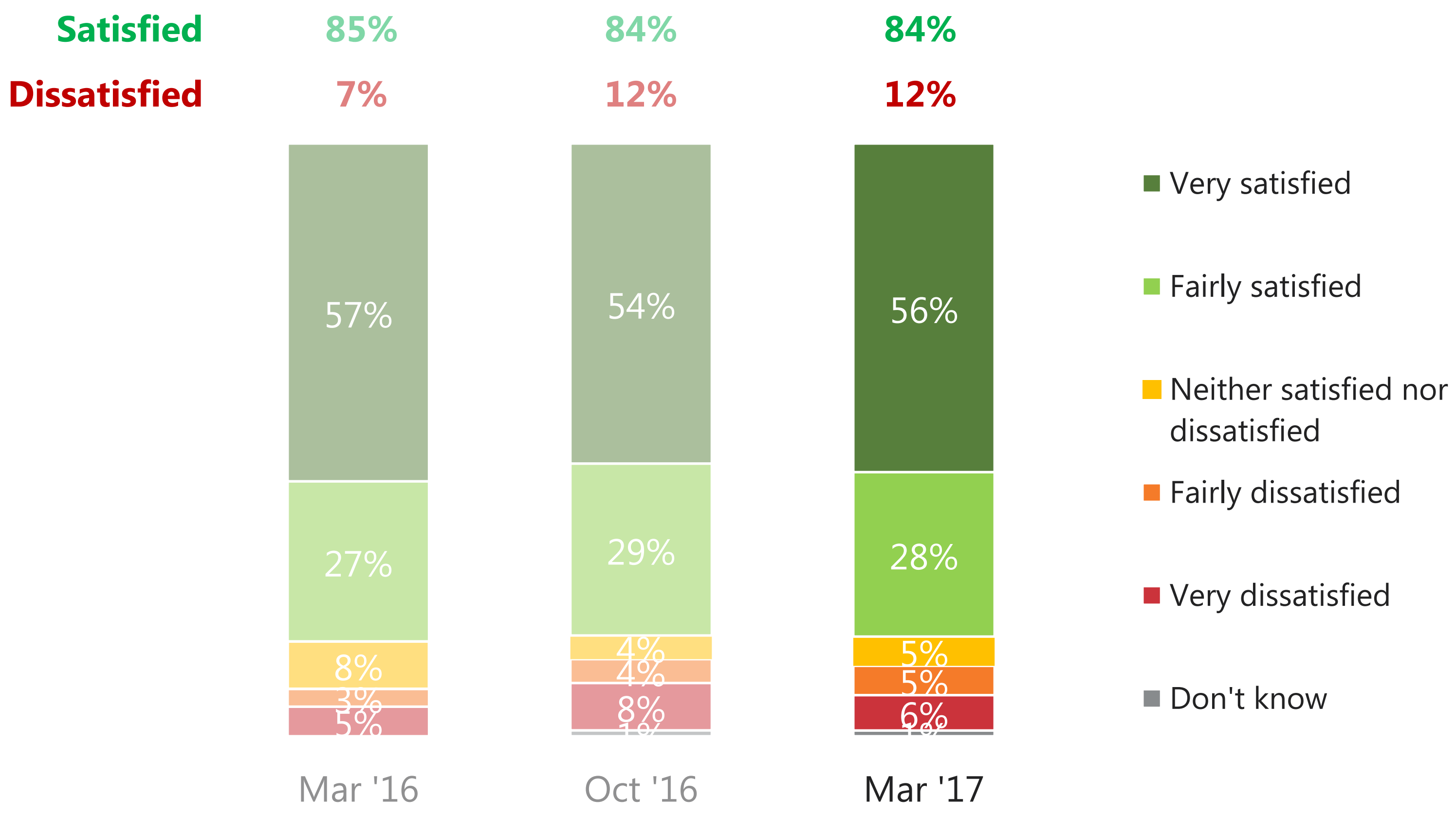
At an overall level, satisfaction levels remain consistent since October 2016.

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

**How assistance was requested?**




**Overall satisfaction with assistance received**



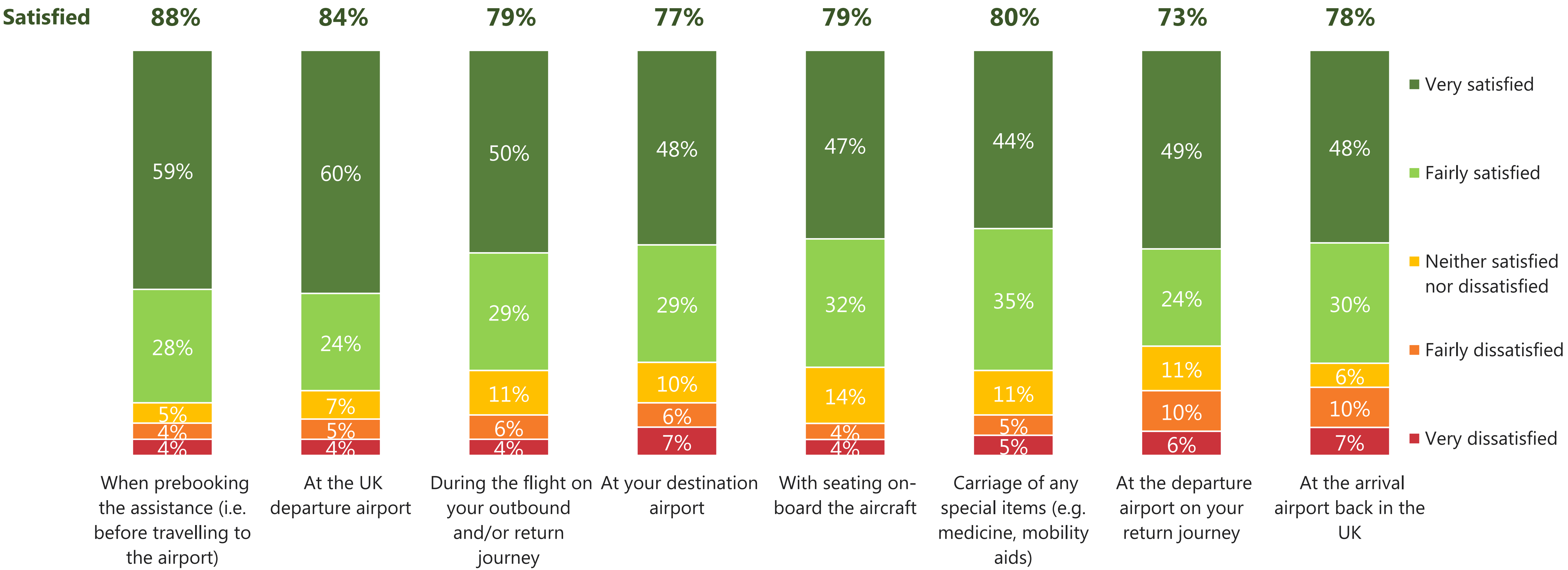

Q70. During this recent flight did you actually request assistance either from the airport, airline or holiday company? Base: All PRM who have flown in the last 12 months and required assistance, exc. DK and N/A (156). Q71. How satisfied or dissatisfied were you with the assistance you received overall?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

Ipsos Loyalty

Civil Aviation Authority

# Satisfaction with assistance at each point in the journey

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



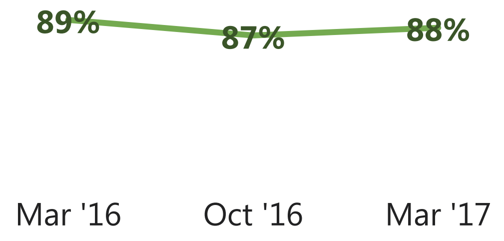

Ipsos Loyalty

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

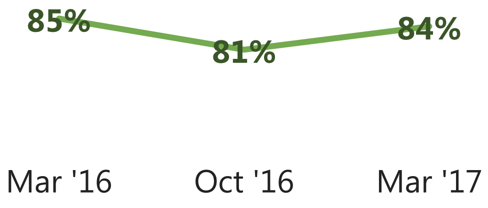
# Satisfaction with assistance at each point in the journey

## Satisfaction with many aspects of assistance remains stable, and improvements in ratings in 2016 are maintained in results from March 2017.

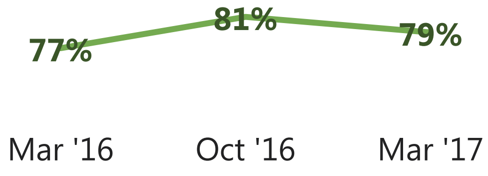
### When pre-booking assistance



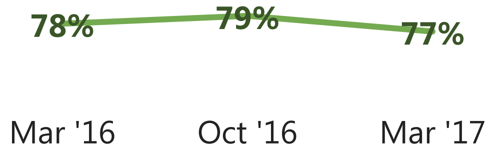

### At UK departure airport



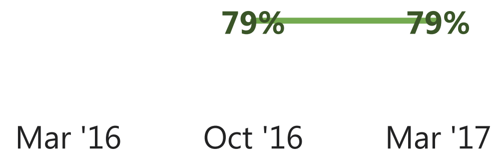

### During flight



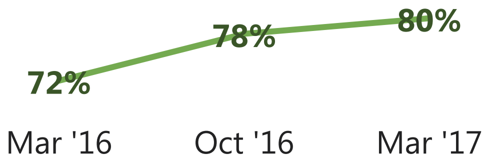

### At destination airport



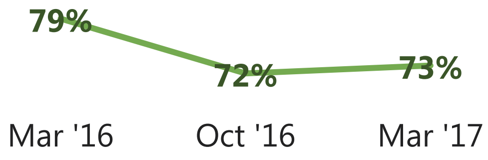

### Seating on-board



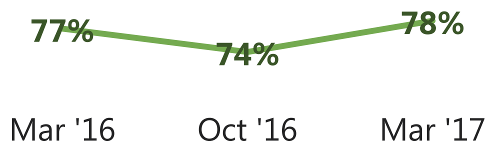

### Carriage of any special items




### Departure airport on return journey




### At arrival airport back in UK




Ipsos Loyalty

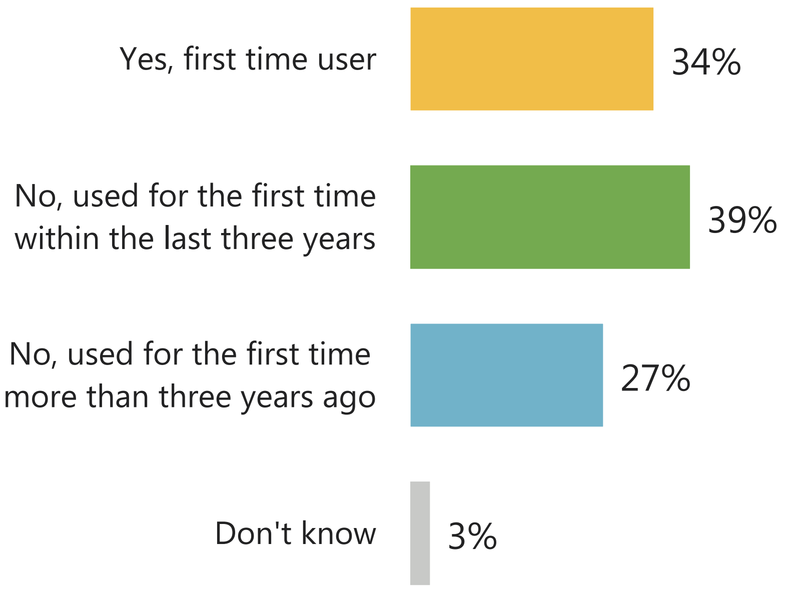
Q73. How satisfied or dissatisfied were you with the assistance you received at each of these points in the journey? Base: Participants who have flown in the last 12 months and required and requested assistance, excl. DKs and NAs (153-225).

Civil Aviation Authority

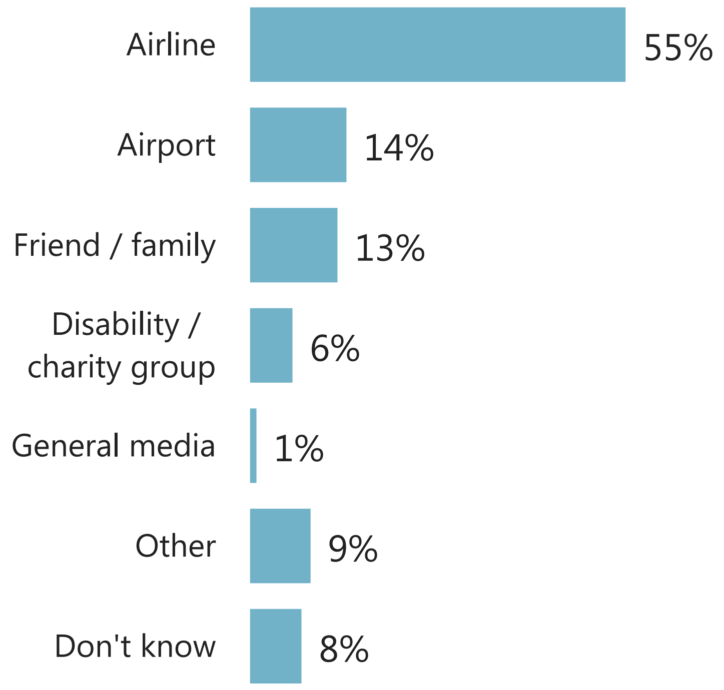
# Satisfaction with assistance overall

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.

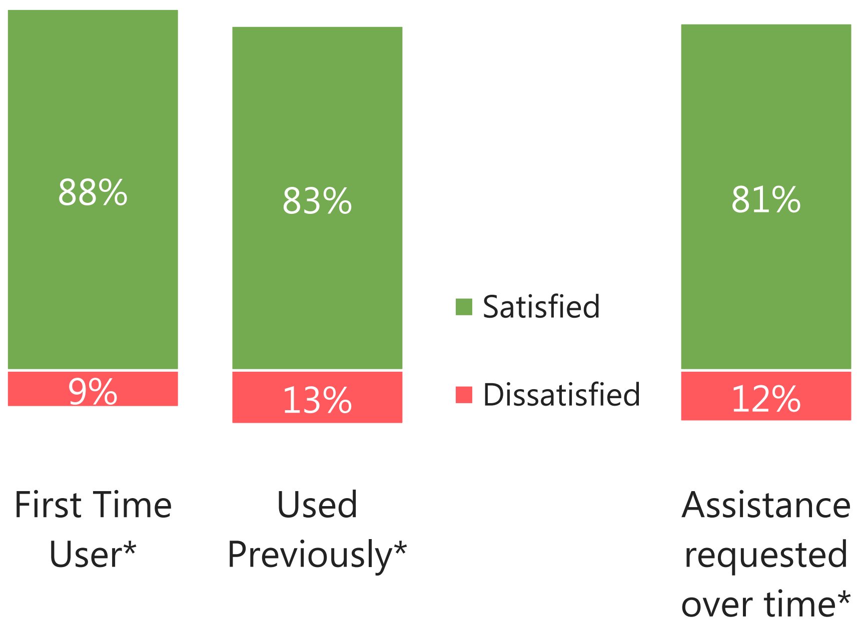
## Was this the first time you had requested assistance?




## How found out that assistance was available*




## Satisfaction with assistance received




**Last Flight** **All occasions**

*** CAUTION LOW BASE**

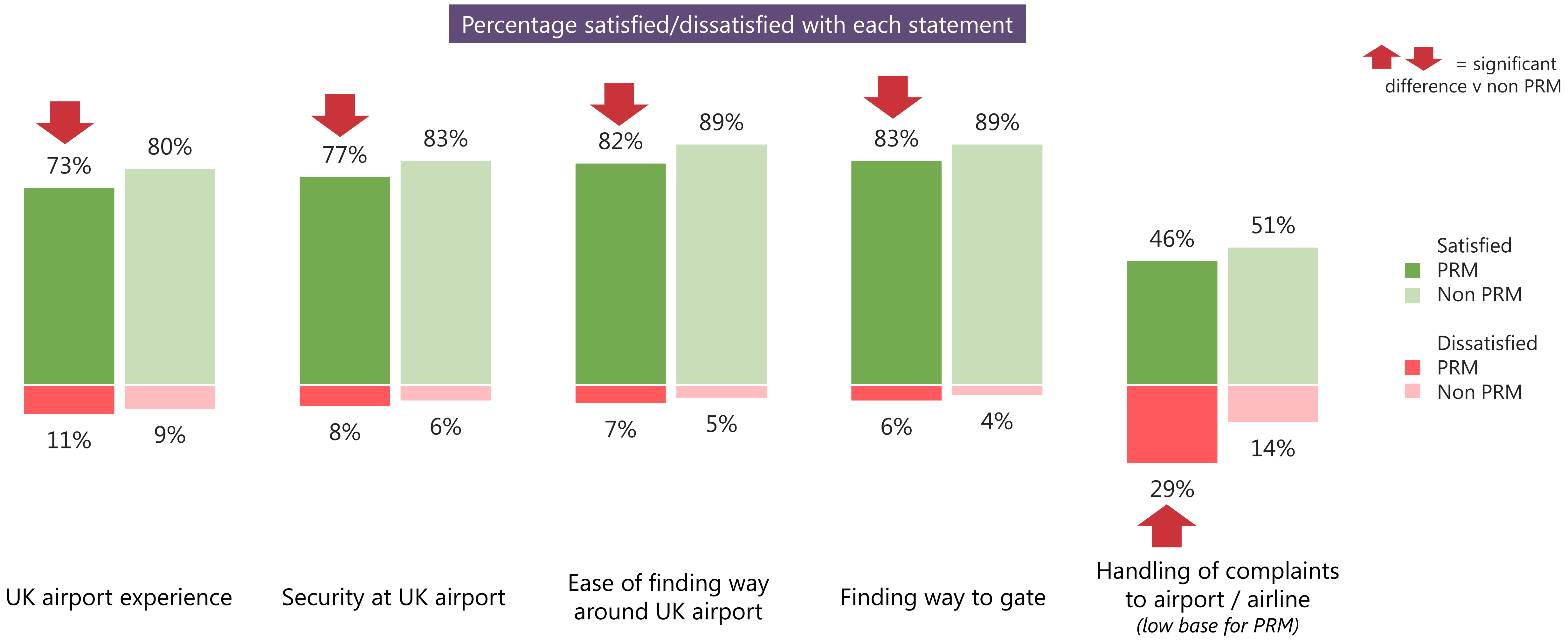
Q74. First time requested assistance? Base: Recent fliers who had received assistance (109). Q76. How found out that assistance at the airport was available first time requested. Base: All who received assistance for the first time in the last three years (78*). Q71. How satisfied or dissatisfied were you with the assistance you received overall? Base: First time user (37*), Used previously (69*). Q77. Satisfaction with the assistance provided across all past occasions? Base: All who have flown previously and received assistance (69*).

Ipsos Loyalty

Civil Aviation Authority

# PRM: Differences compared to non-PRM

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




Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? The airport experience in the UK Base: All who have flown in the last 12 months exc. DK (PRM: 442, non PRM: 1,675). Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Handling of any complaints you made to the airport or airline. Base: All who have flown in the last 12 months exc. DK (PRM: 64, non PRM: 442). 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: 194-195, non PRM: 1,661-1,669)

Ipsos Loyalty

# Understanding dissatisfaction with the assistance

## Failure to provide customers with required assistance is frequently mentioned in relation to dissatisfaction.

> They had difficulty getting me through the security scanner and I had to be physically manhandled - it was humiliating.

> Even though we had requested a lift for myself, I was asked if I would be okay to walk up the stairs, which I felt I had to accept to avoid further delays to the flight. I was also separated from the rest of my party during the process of boarding the plane and taken to the wrong door, so that I had to walk up most of the plane aisle to reach my seat.

> There were too many disabled people and not enough staff available to help.

> I was promised when booking and again when checking in that my special dietary requirements were met. On the flight I was told "no one made a note of that"...so I had no food for the 8 hour flight apart from 2 apples that came from a staff meal!

> I have a severe nut allergy and had to frequently fly for work – it was only short haul so it was kind of fine - but occasionally the staff would be quite blasé about making the announcements and occasionally a few people were still openly eating nuts after not hearing them. Most of the time the staff were quite helpful and good. But it only takes one time to have somebody die on your plane. It might actually help to have some information published about how medical emergencies are dealt with on planes just so people that are concerned don't have to freak out about the time it would take to get treatment.

> They didn't sort out my assistance needs at the other end.

> There were only two captioned inflight movies both ways for the deaf passengers. This is discrimination when all the hearing passengers have more choice of movies.

Ipsos Loyalty

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

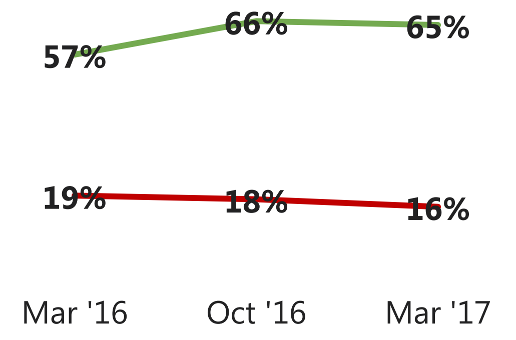
Civil Aviation Authority

# PRM expectations for future travel

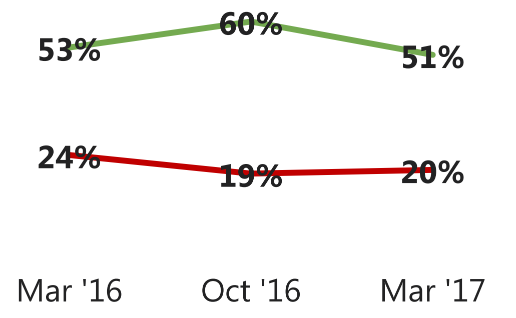
PRM feel generally optimistic about their future travel, if somewhat less so than previously, with two thirds of passengers feeling that they would be treated with dignity and respect. Over 65's are the age group most positive about future travel.

Net Agree  Net Disagree

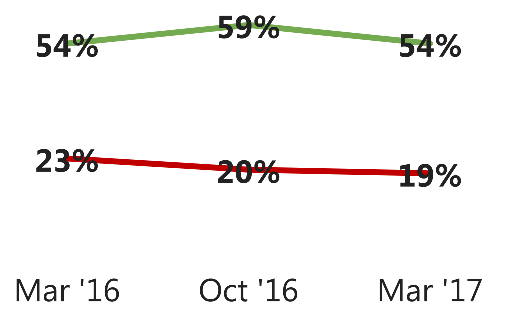
### Opportunity to ask for assistance



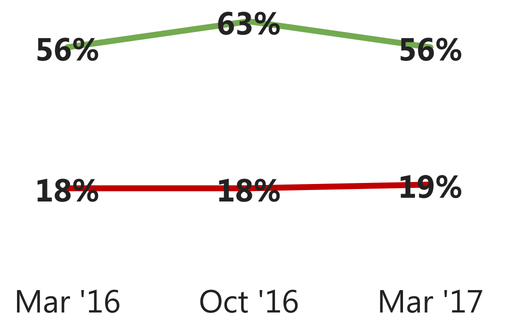

### Information about assistance



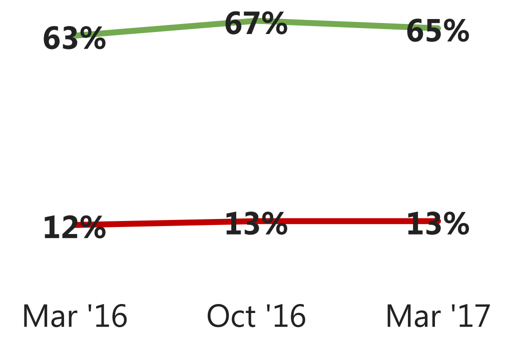

### Needs understood and passed on to airport




### Assistance give during journey




### Treated with dignity and respect




**Agreement amongst those aged 65+**

| Opportunity to ask for assistance | Information about assistance | Needs understood and passed on | Assistance given during journey | Treated with dignity and respect |
|---|---|---|---|---|
| 75% | 61% | 64% | 60% | 76% |

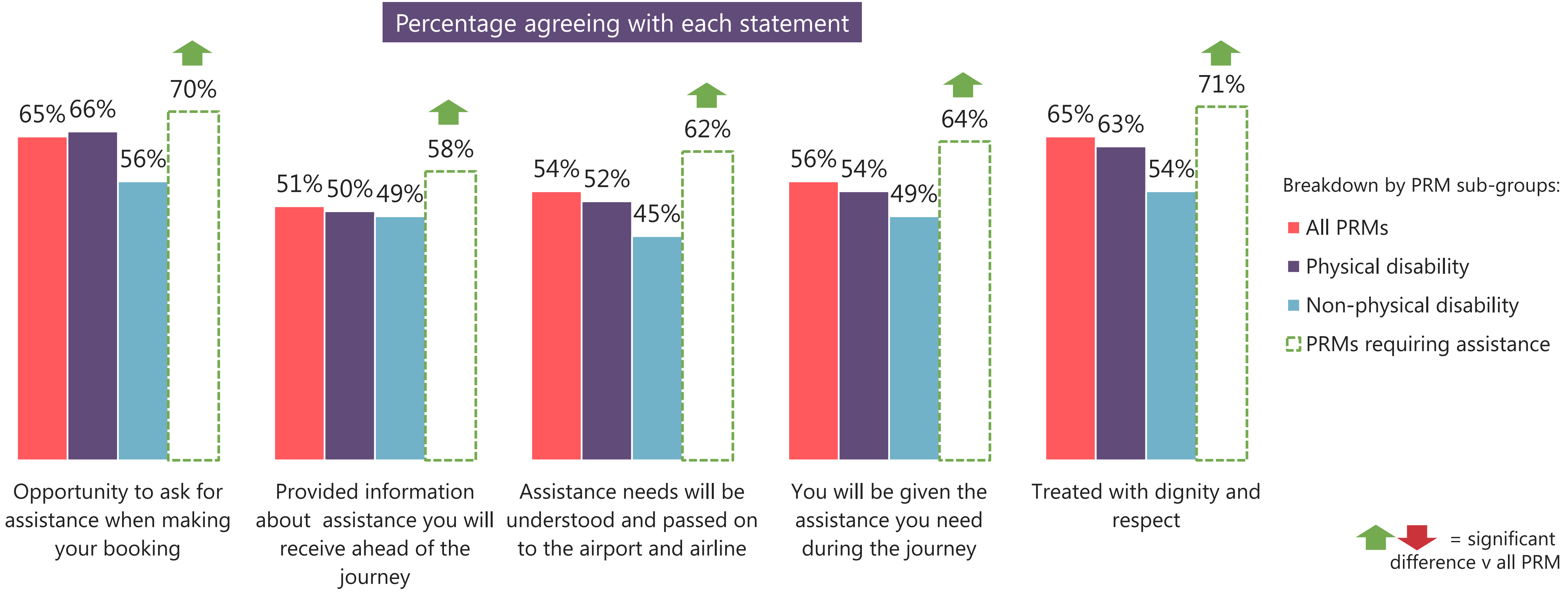
Ipsos Loyalty

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 (158); PRM and flown in last 10 years aged 65+, excl. DKs (50).

Civil Aviation Authority

# PRM with physical and non-physical disabilities

PRM requiring assistance are most positive about future assistance, particularly in regard to asking for assistance when booking and being treated with dignity and respect. Non- physical PRM's feel the least positive, especially in regard to their needs being understood.

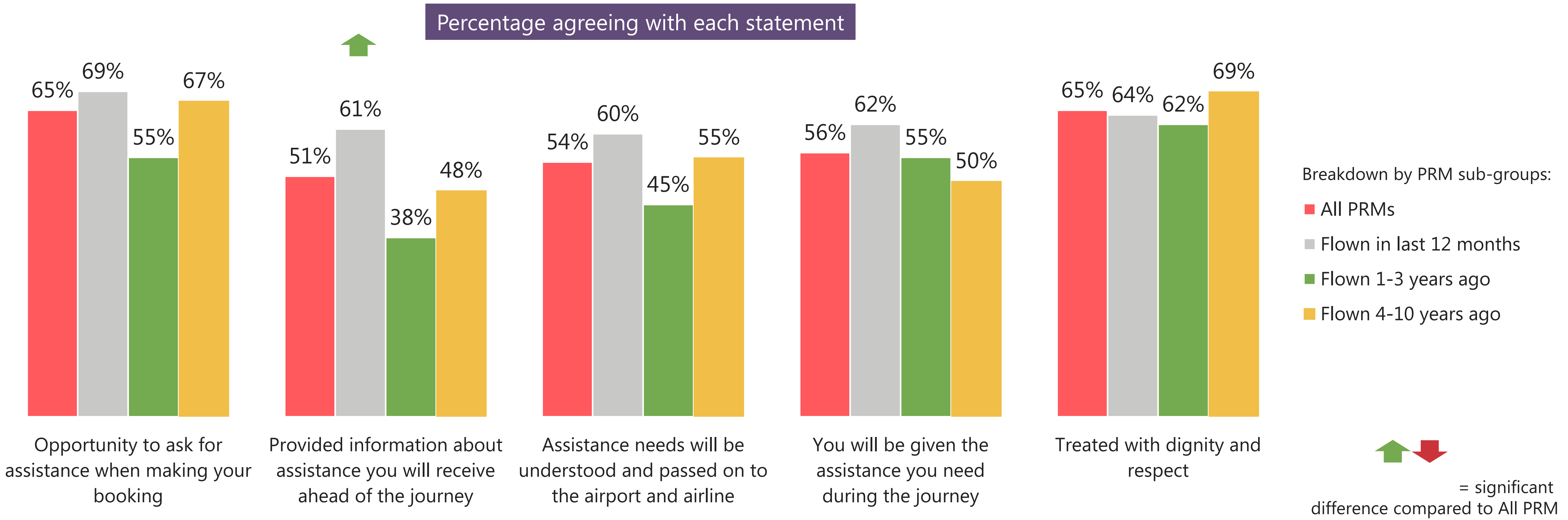



Q90. To what extend do you agree or disagree with each of these statements about how your disability or health condition needs will be dealt with if and when you next choose to fly? Base: PRM and flown in last 10 years, excl. DKs (163); PRM with physical disability, excl. DKs (132); PRM with non-physical disability, excl. DKs (48); PRM requiring assistance, excl. DKs (114).

Ipsos Loyalty

# PRM with recent flight experience

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



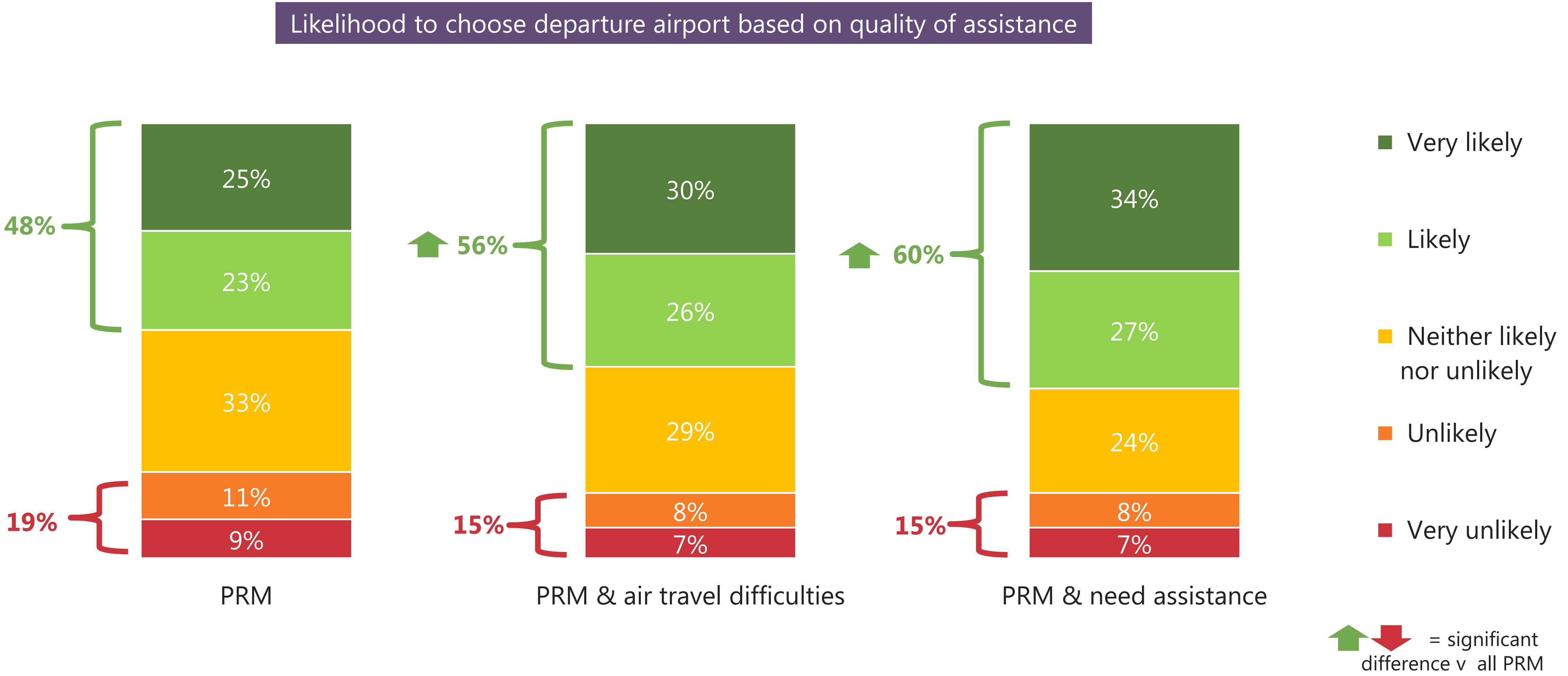

Q90. To what extend do you agree or disagree with each of these statements about how your disability or health condition needs will be dealt with if and when you next choose to fly? Base: PRM and flown in last 10 years, excl. DKs (177); PRM flown in last 12 months, excl. DKs (66-69); PRM flown in last 1-3 years, excl. DKs (39-40); PRM flown in last 4-10 years, excl DKs (53-56).

Ipsos Loyalty

Civil Aviation Authority

# PRM: airport choice and assistance provision

The quality of assistance provided at airports plays an important role in choosing the departure airport. PRM's who need assistance are most influenced and around half of all PRM passengers said it would influence their airport choice in future.

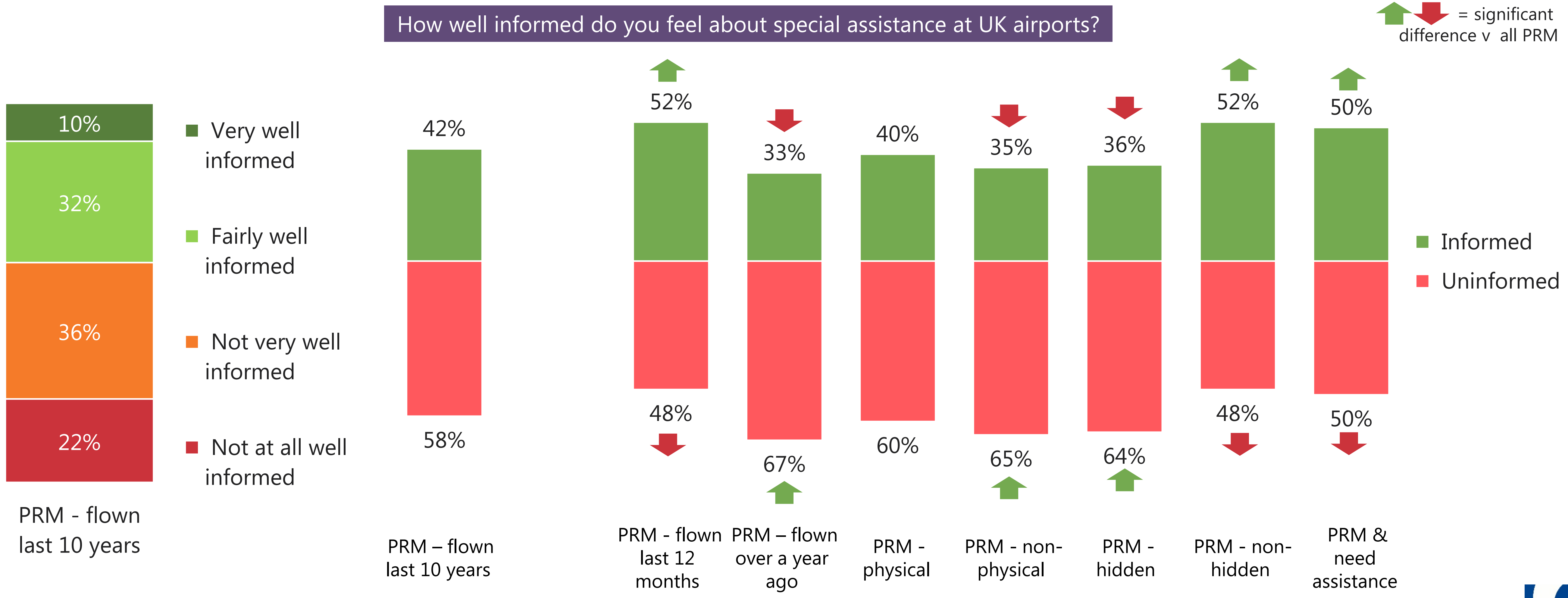



Ipsos Loyalty

Q91. Thinking ahead to when you next choose to fly, how likely or unlikely are you to choose the airport you depart from based on the quality of assistance provided? Base: Excl. DK and NA; PRM and flown in last 10 years (341); PRM and air travel difficulties (153), PRM and need assistance (112)

# PRM: airport choice and assistance provision

PRM passengers did not feel well informed about assistance available, although more recent flyers felt significantly better informed. Those who had flown over a year ago or have a hidden or non physical disability felt the least well informed of all about availability of assistance.




Ipsos Loyalty

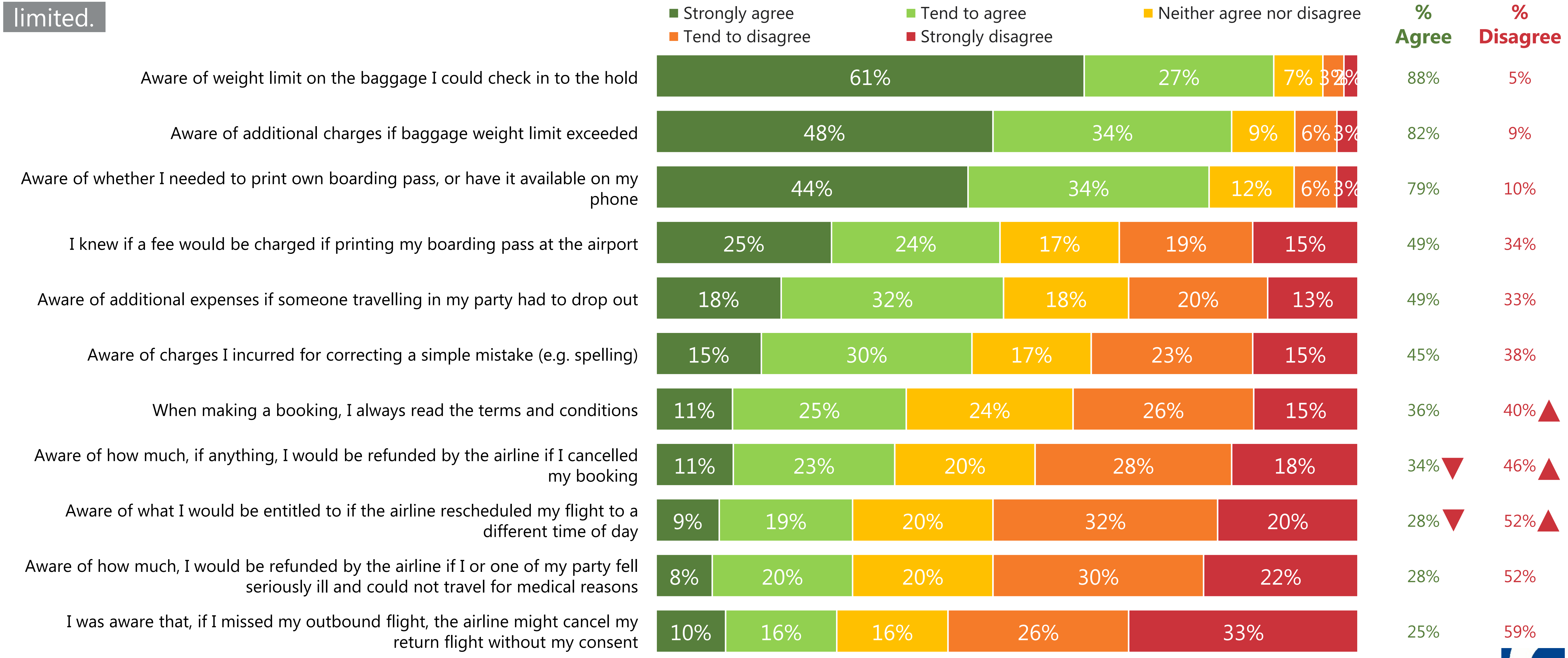
Q92. And how well informed do you feel about special assistance available at UK airports? Base: Excl. DK and NA; PRM and flown in last 10 years (369); PRM and flown last 12 months (182); PRM and flown over a year ago (187); PRM physical (276); PRM non-physical (133); PRM hidden (279); PRM non-hidden (120); PRM & need assistance (121)

# Flight terms and conditions

Ipsos Loyalty

# Awareness of terms and conditions

## Awareness of baggage limits and boarding pass printing continues to be high, though knowledge of T&Cs and hidden charges remains limited.

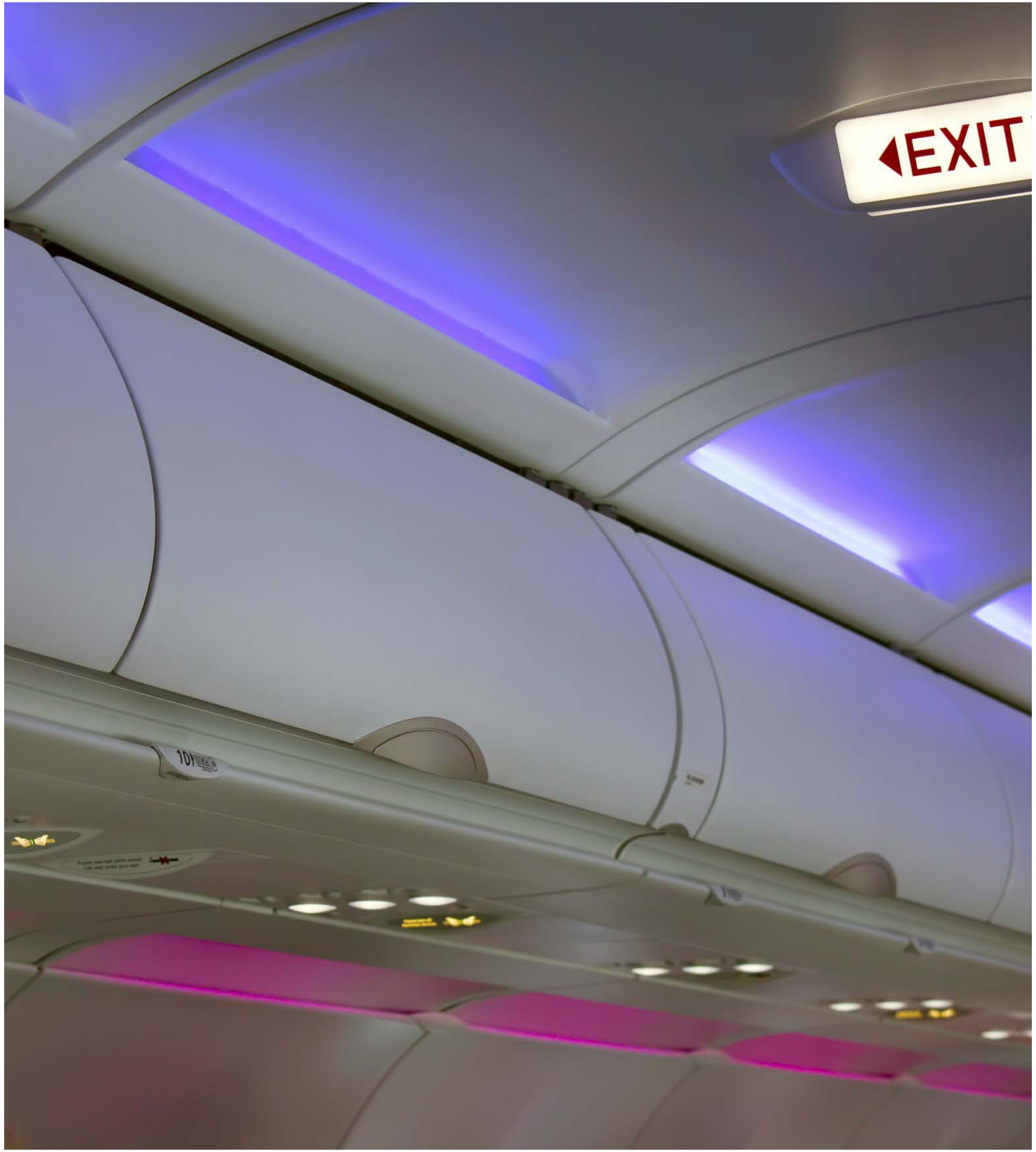



Ipsos Loyalty

Q140. When booking a flight there are certain terms and conditions that you agree to. Thinking about flights you've made in the last three years, to what extent do you agree or disagree with each of these statements about any changes made to a flight or the booking details? Base: All participants who have flown in the last 3 years exc. DK (2286-2472)

# 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.

Jacquie Collins
Director
☎ 020 3059 4729
🖂 Jacquie.Collins@ipsos.com

Trevor Taylor
Associate Director
☎ 020 7347 3005
🖂 Trevor.Taylor@ipsos.com

David Ireland
Research Executive
☎ 020 7437 3228
🖂 David.Ireland@ipsos.com

Daniel Wynn
Graduate Research Executive
☎ 020 3059 5088
🖂 Daniel.Wynn@ipsos.com

**Ipsos Loyalty**

**www.ipsos-mori.com/loyalty**