



**Civil Aviation
Authority:
UK Aviation
Consumer Survey**

October 2018





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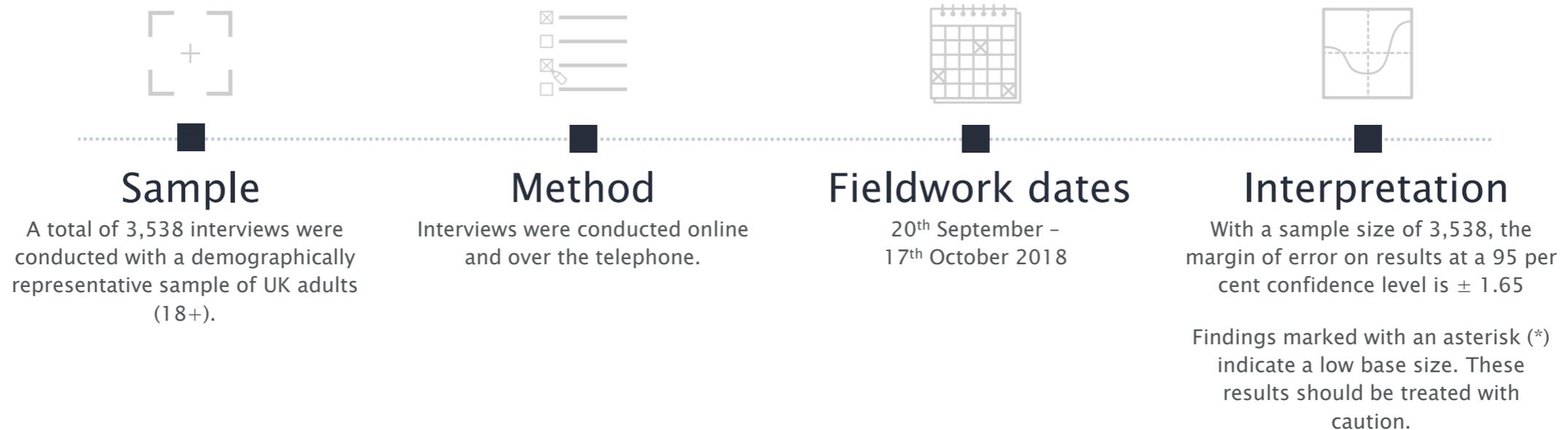
Sections shown in **blue** denote the variable component of the survey. These sections change with every wave of research.



Background and method

The Civil Aviation Authority (CAA) commissioned ComRes, an independent research organisation, to conduct the sixth wave of its bi-annual consumer research tracking study. The research is used by the CAA to develop a deeper understanding of UK consumers' flying behaviours and their attitudes towards the aviation industry. This research programme was carried out in accordance with the requirements of the international quality standard for market research and will inform the CAA's policy and strategy as it regulates the aviation market.

Methodology



  Indicates significant differences among demographic sub-groups.



Demographic weighting and quotas

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

Category	Sub-category	Weighted proportion	Unweighted proportion
Gender	Male	49%	49%
	Female	51%	51%
Age	18-24	12%	12%
	25-34	17%	17%
	35-44	18%	18%
	45-54	18%	18%
	55-64	15%	15%
	65+	20%	21%
Working Status	Full time	41%	41%
	Part time	17%	17%
	Not working	42%	41%

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



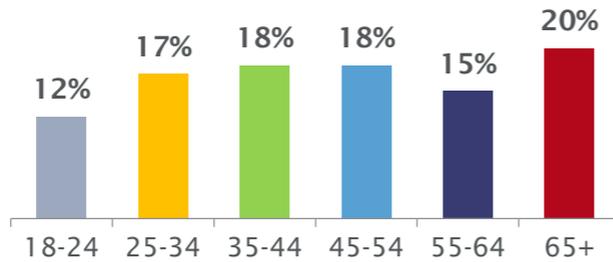
Demographic (Weighted) Sample Profile

Gender

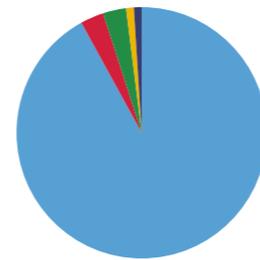


Male 49%
Female 51%

Age



Ethnicity



- White, 92%
- Asian or Asian British, 3%
- Mixed, 3%
- Black or Black British, 1%
- Chinese or other, 1%

Internet Access

99 per cent of those interviewed by phone have internet access



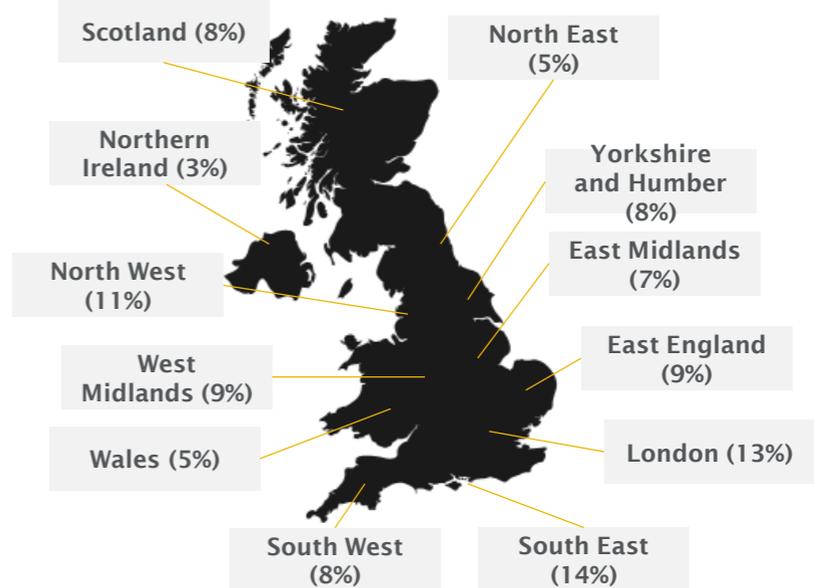
Working Status

Full time (30+ hours per week)	41%
Part time (8-29 hours per week)	15%
Part time (Under 8 hours per week)	2%
Not working	15%
Retired	23%
Homemaker	3%
Student / full time education	1%

Household Income

Up to £14,999	21%
£15,000 – £24,999	20%
£25,000 – £39,000	25%
£40,000 – £74,999	20%
£75,000 or more	7%

Regions





Section 1

Headline Measures

Three-quarters of UK adults have confidence in the safety of UK airlines and airports

Similar to previous waves, the majority of UK adults feel positive about safety and security processes, with three-quarters (74 per cent) agreeing that they have confidence in the safety of UK airlines and airports. Similarly, three in five agree that the balance between security screening and passenger convenience is about right (60 per cent for both).

The environmental impact of flying appears to be of relatively little importance to the UK public: only three in ten think about the impact of flying on the environment when deciding whether to travel by air (30 per cent), or agree that they would pay more for tickets to reduce the environmental/noise impact of flying (29 per cent). However, it should be noted that respondents' reported level of environmental concern is growing.

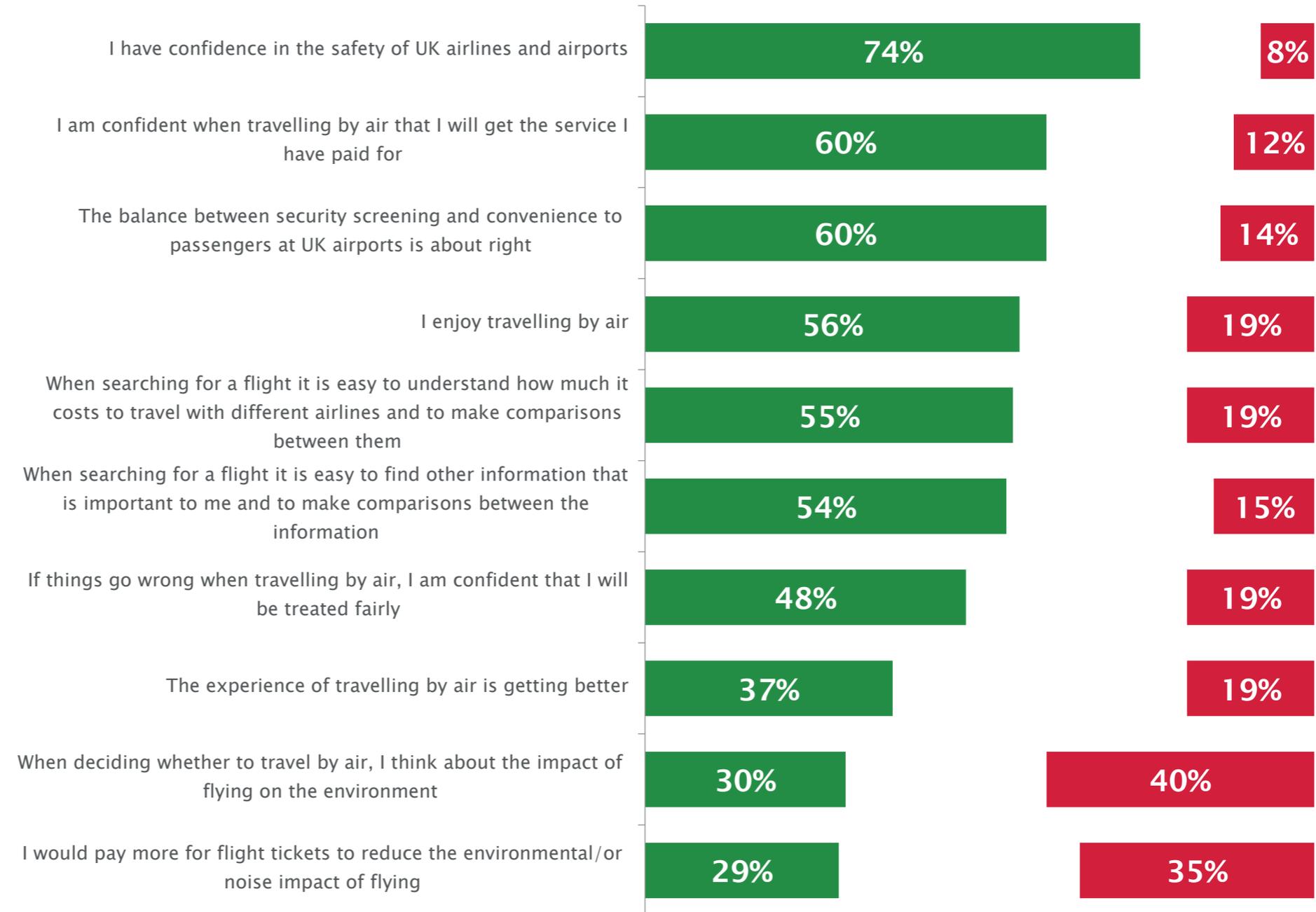
Statements about travelling by air

All respondents



NET: Agree

NET: Disagree



Q15. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3538)

Higher earners are generally more likely to be positive about the experience of travelling by air. Older or disabled passengers are more likely to hold negative views.



Statements about travelling by air

	NET: Agree		NET: Disagree	
I have confidence in the safety of UK airlines and airports	74%	▲ Age 55+ 80% ▲ >£50k 80%	8%	▲ Age 18-34 11% ▲ Disabled 11%
I am confident when travelling by air that I will get the service I have paid for	60%	▲ >£50k 64% ▲ N. Ireland 75%	12%	
The balance between security screening and convenience to passengers at UK airports is about right	60%	▲ >£50k 64% ▲ North East 72%	14%	▲ Disabled 17%
I enjoy travelling by air	56%	▲ >£50k 63% ▲ Full time employment 63%	19%	▲ Disabled 22%
When searching for a flight it is easy to understand how much it costs to travel with different airlines and to make comparisons between them	55%	▲ >£50k 65% ▲ Non-disabled 58%	19%	▲ Age 55+ 22%
When searching for a flight it is easy to find other information that is important to me and to make comparisons between the information	54%	▲ >£50k 64% ▲ Non-disabled 57%	15%	▲ Age 55+ 18%
If things go wrong when travelling by air, I am confident that I will be treated fairly	48%	▲ Full time employment 53%	19%	
The experience of travelling by air is getting better	37%	▲ >£50k 44%	19%	▲ Age 55+ 24%
When deciding whether to travel by air, I think about the impact of flying on the environment	30%	▲ London 40%	40%	▲ Age 55+ 46%
I would pay more for flight tickets to reduce the environmental or noise impact of flying	29%	▲ >£50k 36% ▲ Age 18-34 36%	35%	▲ Age 55+ 38%



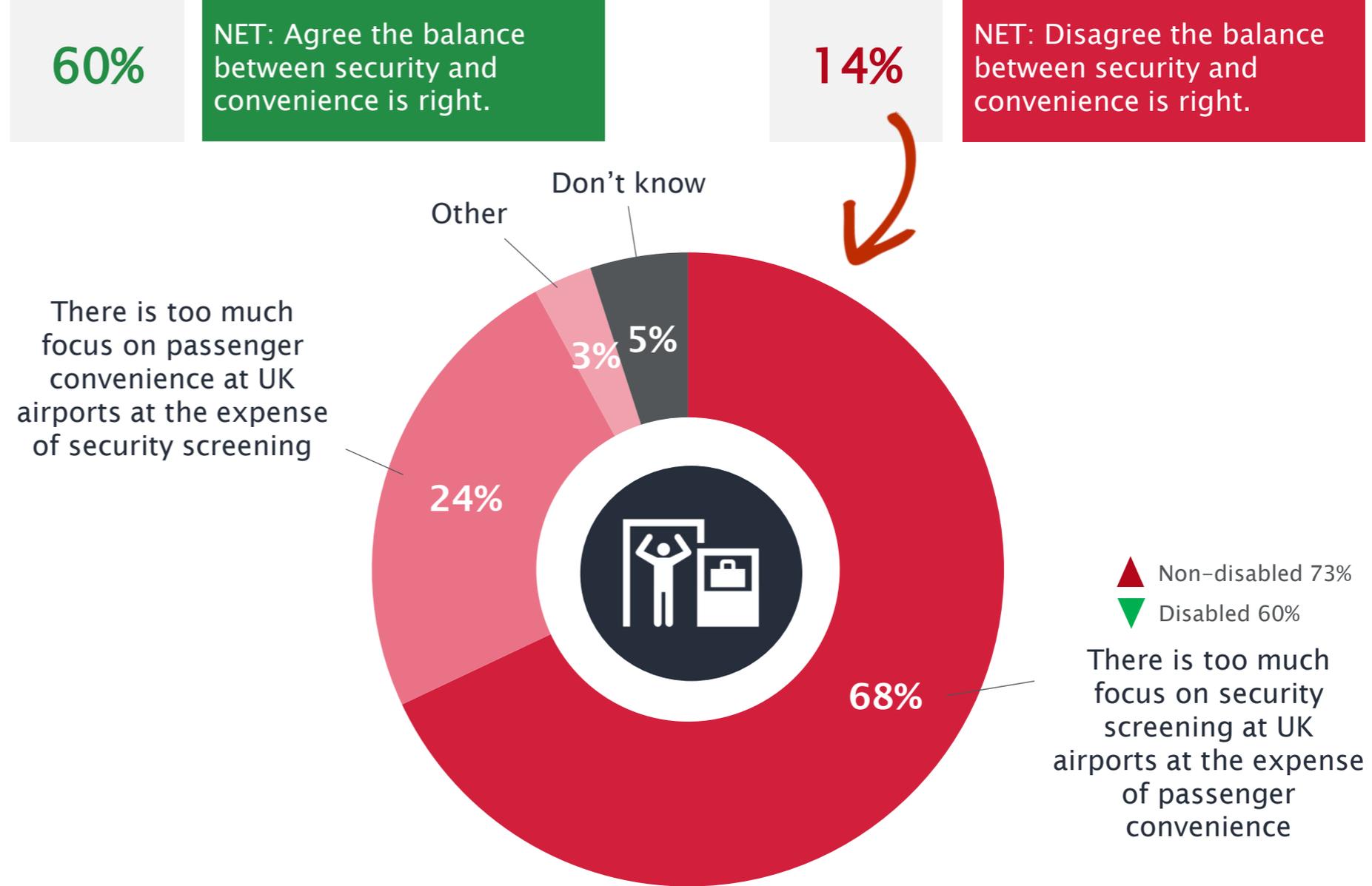
Security vs. Convenience Balance

Three in five agree that the balance between security screening and passenger convenience is about right

60 per cent of respondents agree that the balance between security and passenger convenience is about right.

The 14 per cent who disagree are more likely to say that there is too much focus on security screening to the expense of passenger convenience (68 per cent) than the other way round (24 per cent).

Disabled passengers are significantly less likely than non-disabled passengers to say that there is too much focus on security screening at the expense of convenience (60 per cent vs. 73% respectively).



Q15. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3538)

Q16. You said 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 between security screening at UK airports and convenience to passengers is about right (n=505)

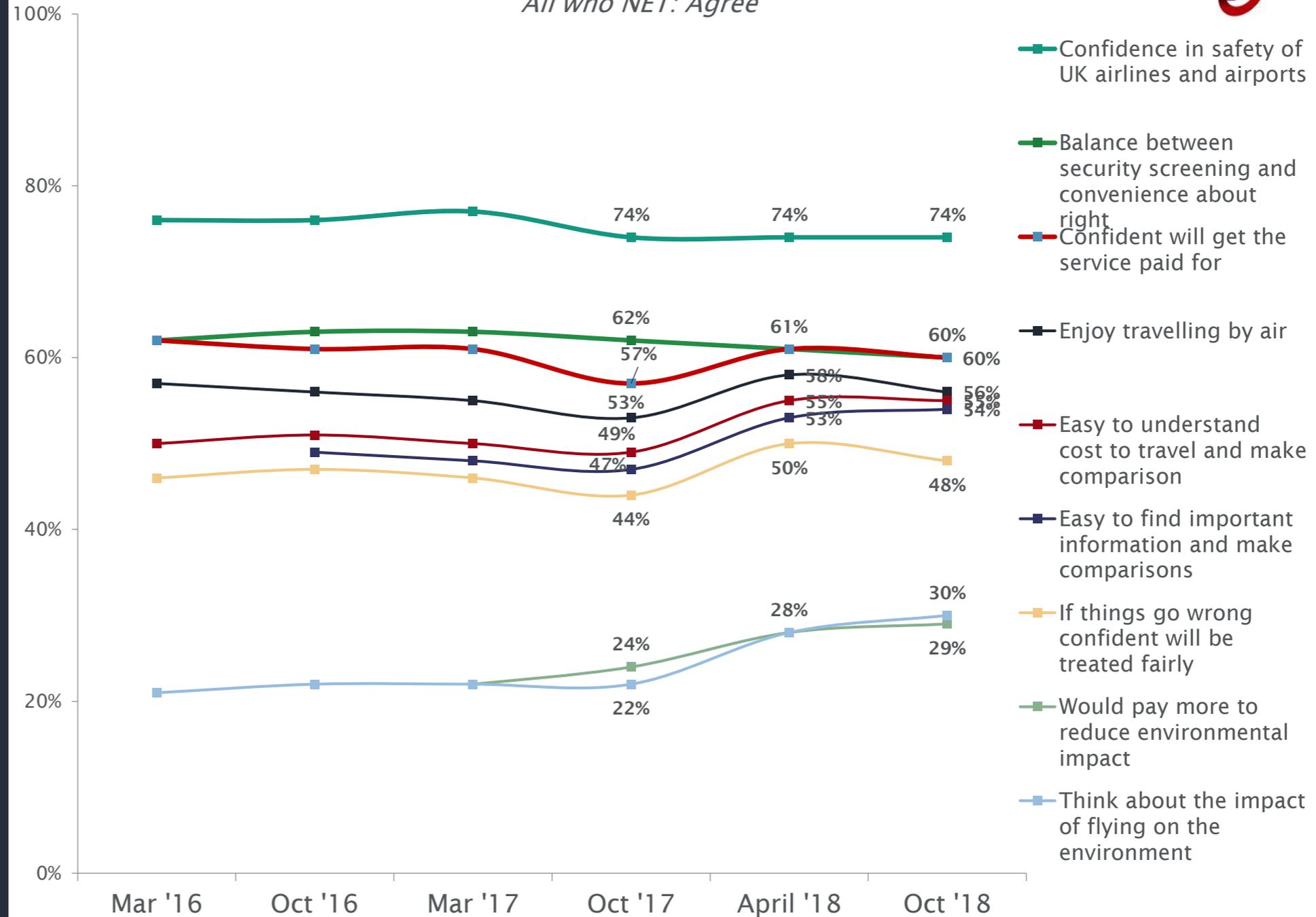
Views towards travelling by air have remained broadly consistent since Spring 2016

All metrics remain broadly the same compared to passenger responses in Spring earlier this year. UK adults are as likely as in April 2018 to say that they are confident in the safety of UK airlines and airports (74 per cent), and that it is easy to understand how much it costs to travel with different airlines when searching for a flight (55 per cent). Passengers are also as likely to agree that the security screening/passenger convenience balance is about right, that they are confident they will get the service they paid for, that they enjoy travelling by air, and that they are confident they will be treated fairly if things go wrong.

The transparency of flight information and environmental consciousness of passengers are areas that continue to improve the most. 54 per cent of respondents agree that it is easy to find and compare important flight information, whilst three in ten say that they would think about the environmental impact of flying (30 per cent), or would pay more to reduce this impact (29 per cent) – representing a shallow increase since Spring 2016.

Headline Measures: Trend

All who NET: Agree



Q15. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3538)



UK adults are as likely to agree that they enjoy travelling by air compared to Spring 2018

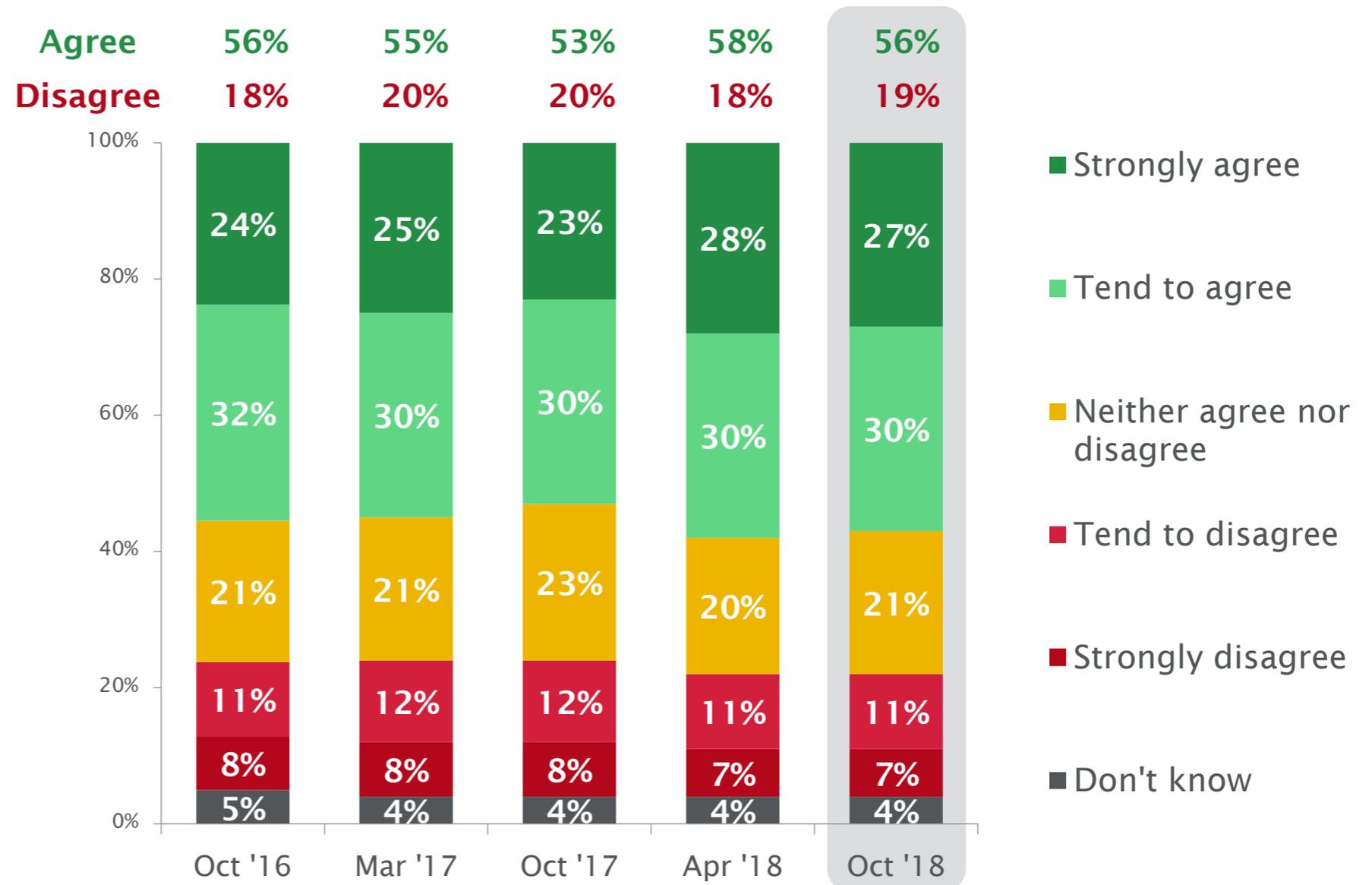
The proportion of passengers who say they enjoy travelling by air has remained broadly consistent with the previous wave, with just over half (56 per cent) agreeing with this statement (vs. 58 per cent April 2018). Accordingly, approaching one in five (19 per cent) disagree with the statement (vs. 18 per cent April 2018).

There are a number of significant differences in the enjoyment of travelling by air across demographics and regions, namely:

- Those employed full time are significantly more likely to say that they enjoy travelling by air (63 per cent), with a third (33 per cent) strongly agreeing with this.
- Scottish passengers are also more likely to agree with the statement than adults from other UK regions, with three in five (63 per cent) doing so.
- Those with higher incomes are more likely than those with lower incomes to agree with this statement (63 per cent >£50k vs. 55 per cent <£50k).
- Non-disabled passengers are more likely than those who are disabled to agree with this statement (59 per cent vs. 49 per cent respectively).

Headline measures: Overall

I enjoy travelling by air



Passengers are just as likely to agree that it is easy to understand the cost of travel or to find important information to make comparisons as those in the previous wave

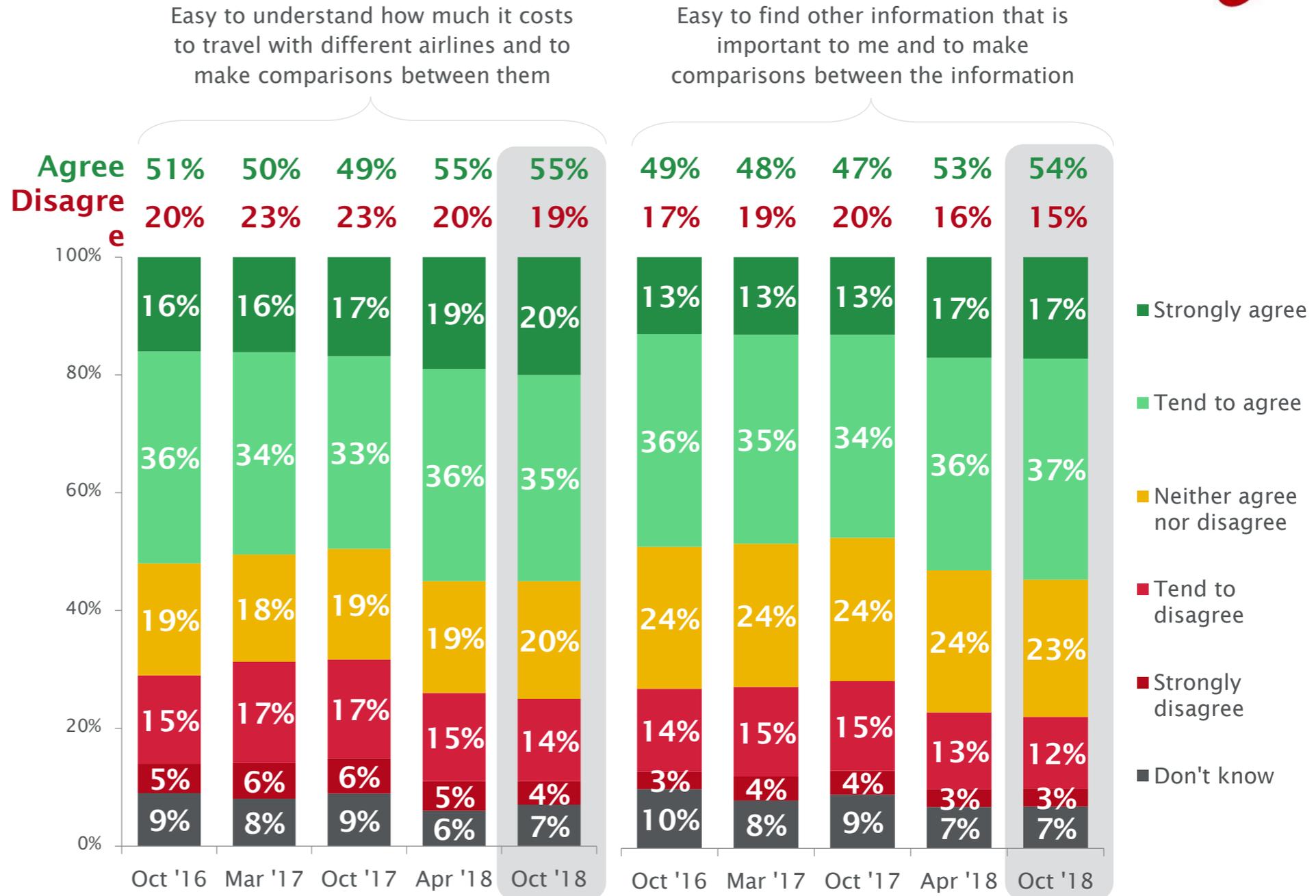
UK adults remain consistent in their thoughts regarding the clarity of travel costs with different airlines and ease of comparison between them, with 55 per cent agreeing with this – the same proportion as April 2018. Respondents also remain broadly consistent with their views on consumer information: 54 per cent agree that it is easy to find other important information (compared to 53 per cent in April 2018), whilst only 15 per cent disagree (vs. 16 per cent in April 2018).

Within this, the following groups are more likely to agree with each of these statements:

- UK adults with an annual income of £50,000 or more (65 per cent and 64 per cent respectively);
- Those employed full time (64 per cent and 62 per cent respectively);
- Younger passengers aged 18–34 (58 per cent and 57 per cent respectively).

Those with a disability are significantly less likely to agree that it is easy to understand the cost of travel and make comparisons between them (48 per cent vs. 58 per cent non-disabled), or to find and compare important flight information (48 per cent vs. 57 per cent non-disabled).

Headline measures: Consumer Choice



Q15. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3538)

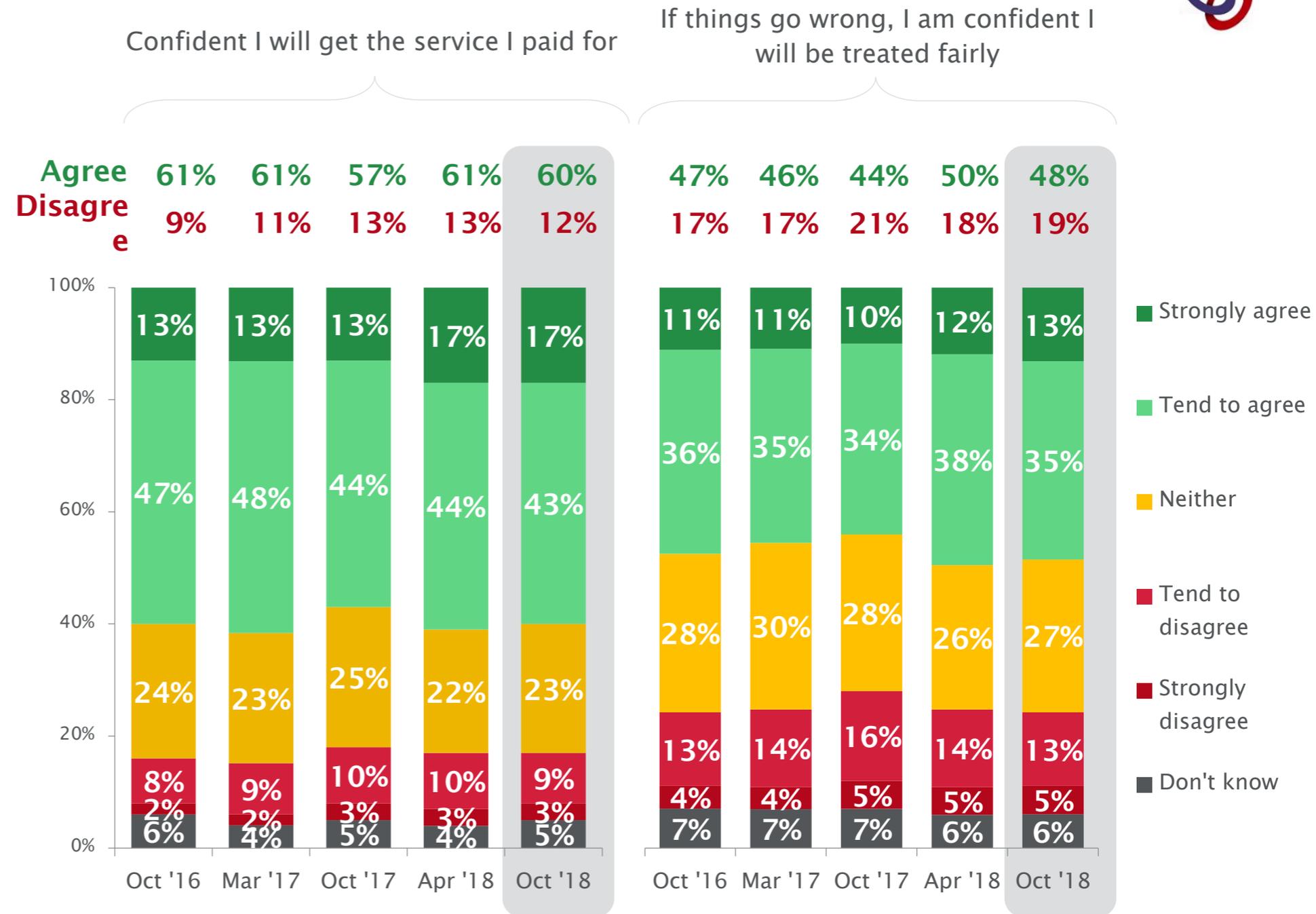


Levels of consumer confidence have also remained consistent across both measures with the previous wave

Three in five adults (60 per cent) agree that they are confident they will get the service they paid for, and less than half (48 per cent) agree that they are confident they will be treated fairly when things go wrong. This remains in line with findings from the previous wave (61 per cent and 50 per cent respectively April 2018), but are nonetheless key areas for improvement.

Northern Irish passengers are significantly more likely to agree, with three-quarters (74 per cent) saying that they are confident they will get the service they paid for. Likewise, those who perceive flying to be 'getting better' appear particularly pleased with the value of service, with more than four in five (81 per cent) agreeing they are confident in this. Non-disabled passengers are also more likely to agree with this than disabled passengers (63 per cent vs. 54 per cent respectively).

Headline measures: Consumer Confidence



Q15. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3538)

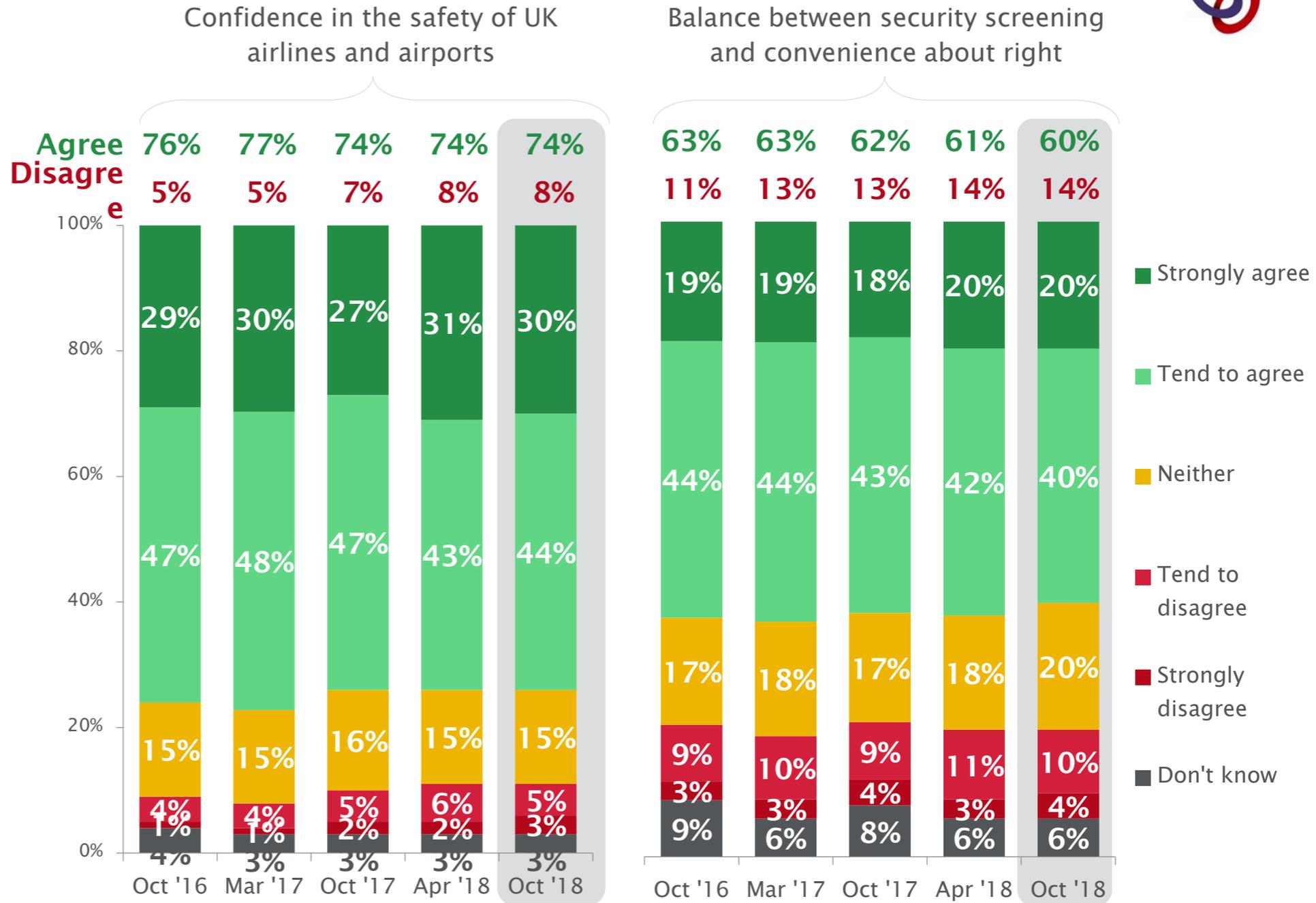


A majority of UK adults feel positive about flight safety and airport security, in line with Spring 2018

Attitudes towards safety and security have remained in line with those expressed in the previous wave of research. Specifically, three-quarters (74 per cent) are confident in the safety of UK airlines and airports, whilst three in five (60 per cent) consider the balance between airport security screening and passenger convenience to be about right.

Those aged 55+ are significantly more likely to be confident in air travel safety, with 80 per cent agreeing with this compared to only 66 per cent of younger adults aged 18-34. Regional data indicates that Northern Irish and Scottish adults are more confident as well, with four in five (81 per cent and 79 per cent respectively) agreeing with this, whilst seven in ten (72 per cent) adults in the North East agree that the balance between security screening and convenience is about right. However, disabled passengers are significantly less likely than non-disabled to agree that this balance is about right (51 per cent vs. 63 per cent).

Headline measures: Security and Safety



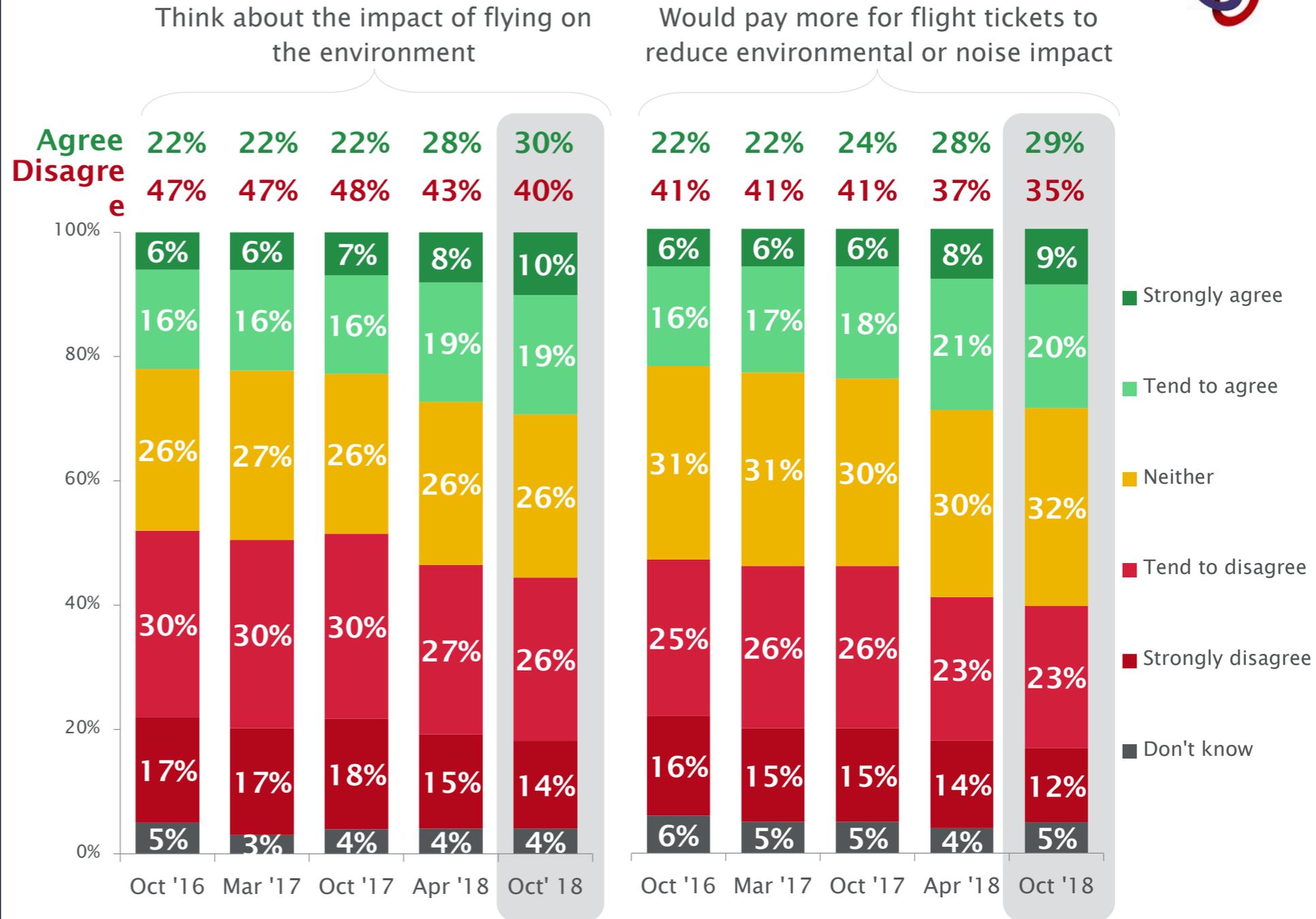
Q15. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3538)

Consideration of the environmental impact of flying has grown since Autumn 2016, but remains low

Three in ten UK adults (30 per cent) say that they would think about the impact of flying on the environment. Similarly, 29 per cent agree that they would be willing to pay more for tickets to reduce the environmental or noise impact of flying (vs. 28 per cent for both in April 2018.)

More specifically, those aged 18–34 are more likely to agree that they think about the environmental impact of flying compared to those aged 55+ (34 per cent vs. 24 per cent respectively), and more likely to agree to pay more to reduce this impact (36 per cent vs. 23 per cent respectively). Those earning more are also more likely to agree to pay more to benefit the environment (36 per cent >£50k vs. 27 per cent <£50k), whilst Londoners are most likely to think about the environmental impact and pay more accordingly (40 per cent and 33 per cent respectively).

Headline measures: Environment



Q15. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3538)



Section 2

Flying Behaviour



Distance from nearest UK airport

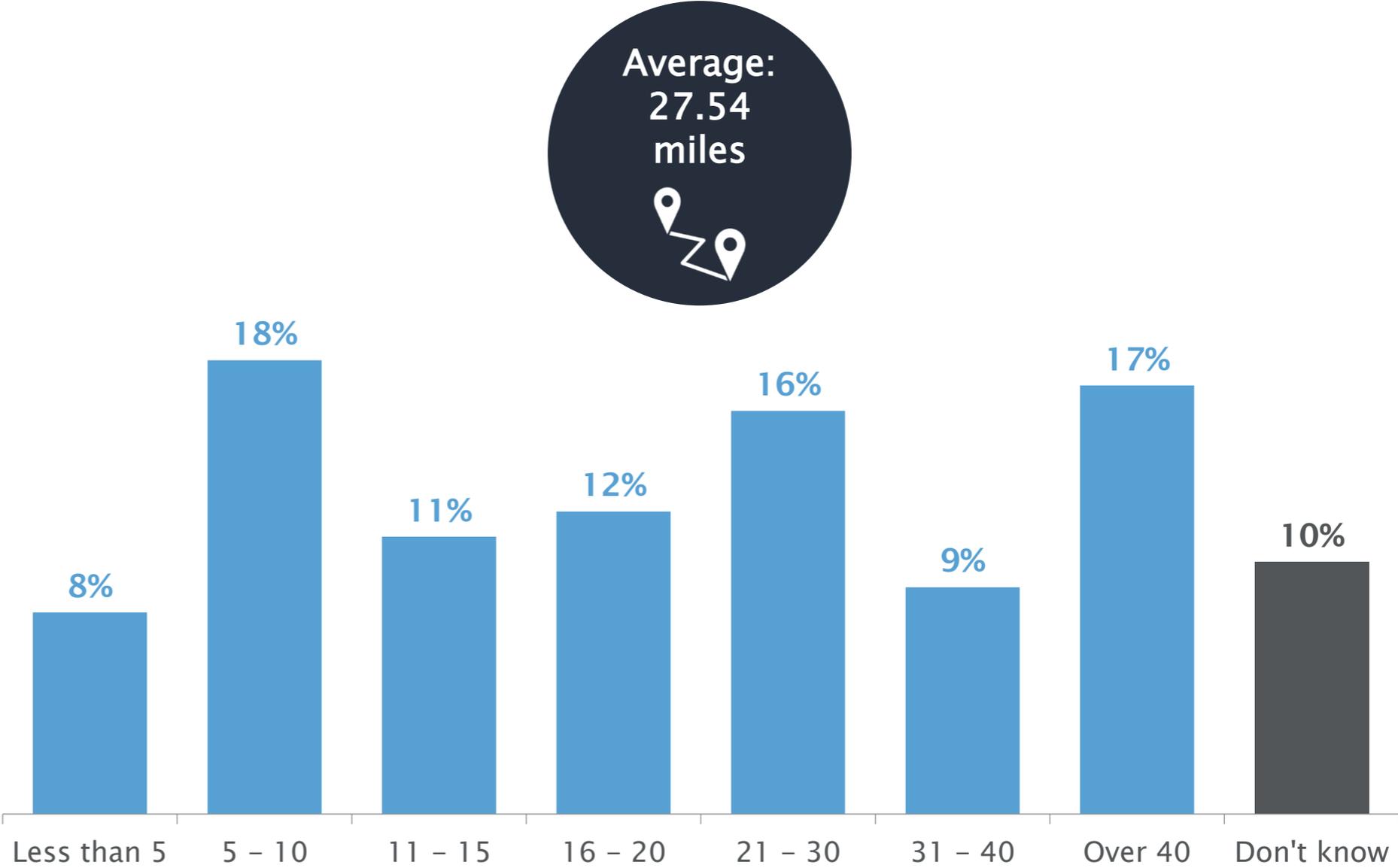
Distance in miles

A quarter of UK adults report living within 10 miles of a UK airport

Close to one in ten (8 per cent) UK adults live less than 5 miles from a UK airport, and one in five (18 per cent) live within a 5–10 mile radius.

Almost one in five (17 per cent) also live over 40 miles from a UK airport.

There does not seem to be any clear correlation between the distance passengers live from their nearest airport and their satisfaction with the overall travel experience.



Q1. Approximately how far do you live from your nearest UK airport? Base: All respondents (n=3538)

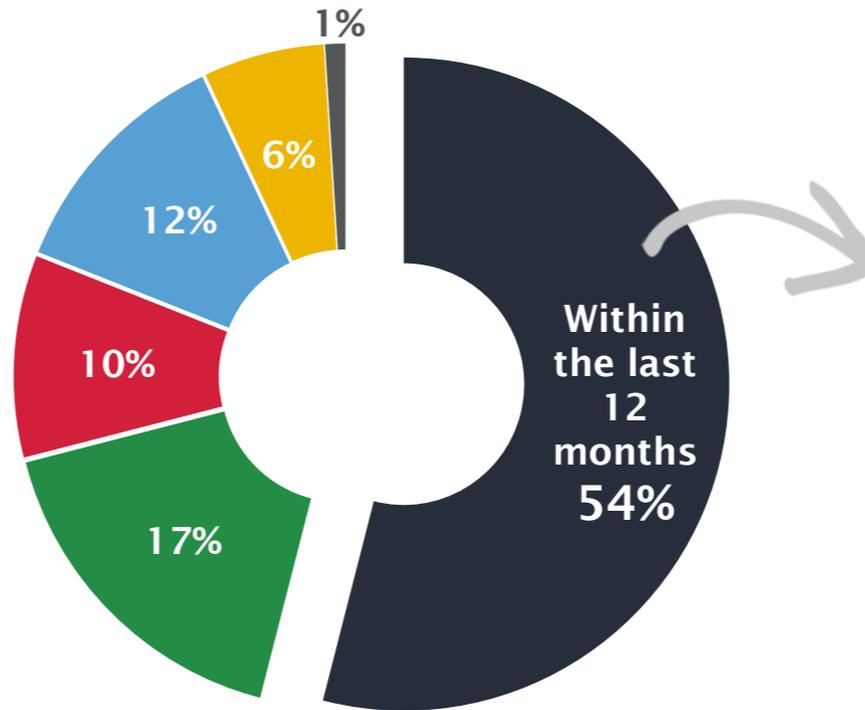


More than half of UK adults have flown from a UK airport within the last year

The majority of UK adults (54 per cent) have flown from a UK airport within the last 12 months, whilst only 6 per cent have never flown before. Those who are younger, higher-earning, or in full time employment are more likely to have flown in the last 12 months than other demographics.

Those who have flown in the last year are most likely to have taken only one flight (33 per cent), whilst approximately one in ten (11 per cent) have flown over 5 times in that period.

Time since flight from a UK airport



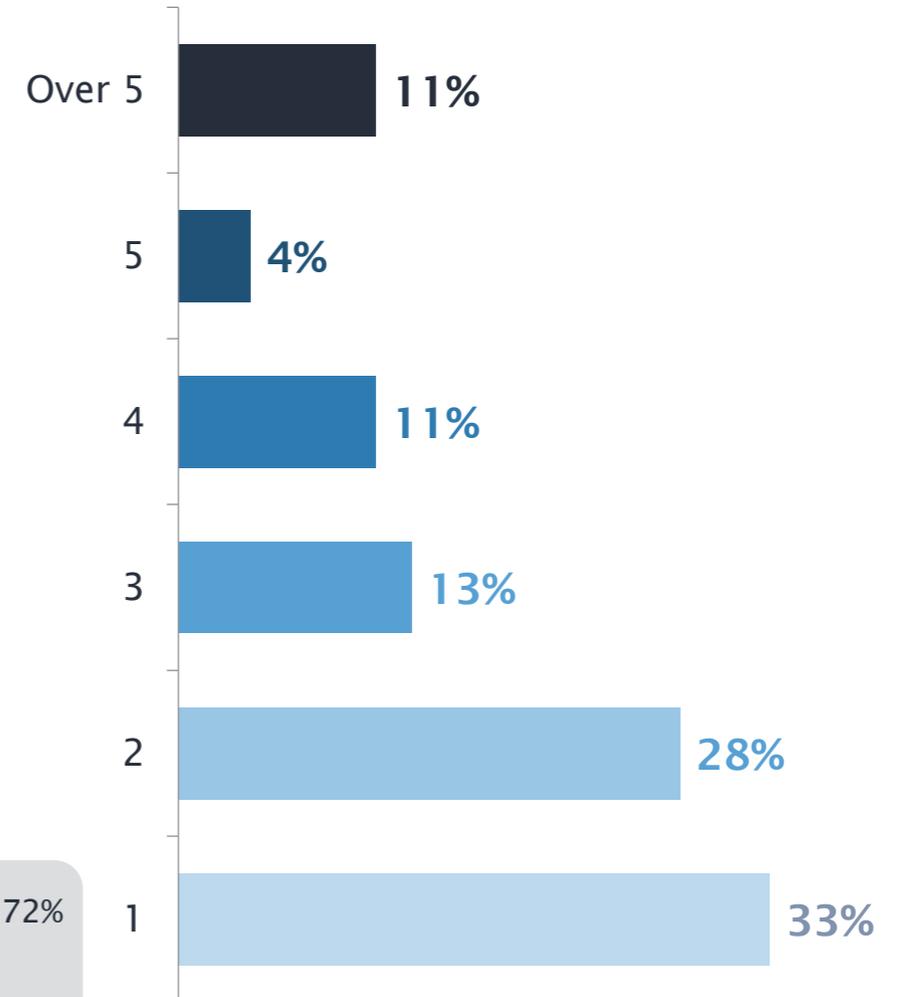
- Within the last 12 months
- 1 - 4 years ago
- 4 - 10 years ago
- More than 10 years ago
- Never
- Don't know/can't remember

Within last 12 months:

- ▲ Aged 18-34 62%
- ▲ Full time employment 72%
- ▲ > £50k 79%
- ▼ April 2018 56%

Number of flights in the last 12 months

All those who have flown in the last 12 months



Q2. When was the last time you flew from a UK airport? This could have been either to travel within the UK or to go abroad. This could have been from any airport, not just your nearest one. Base: All respondents (n=3538)

Q3. How many trips by air have you made in the last 12 months? Please count outward and return flights and any transfers as one trip. If you are not sure then your best estimate is fine. Base: All who have flown in the last 12 months (n=1920)

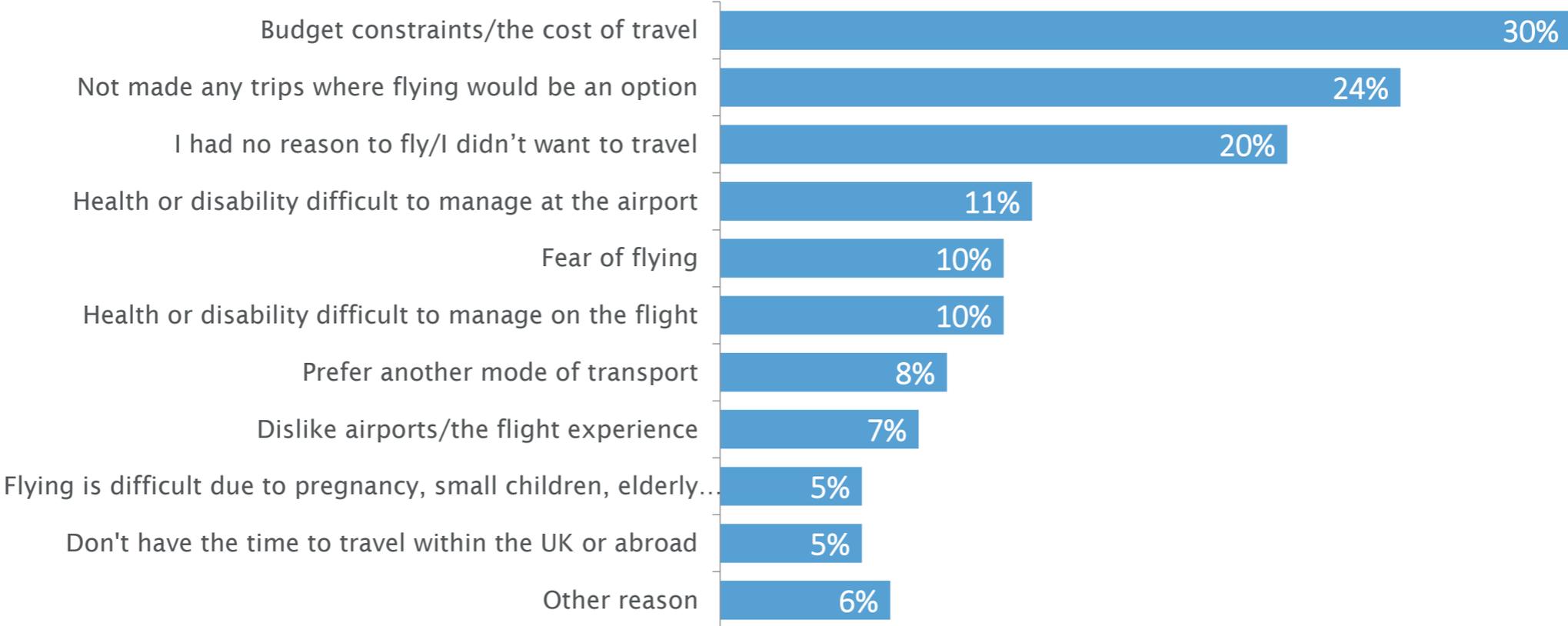
Budget constraints and the cost of travel remain the greatest barriers to flying



Barriers to flying in the past 12 months

All those who have not flown recently

Showing all responses of 5% and over



Budget constraints and/or the cost of travel remain the most common barriers to flying in the last year, with 30 per cent of non-recent flyers citing this as the main reason. This remains broadly consistent with the results of the previous wave (33 per cent in April 2018).



Passengers are most likely to say they purchased a return flight worth £101 – £300 for their last trip

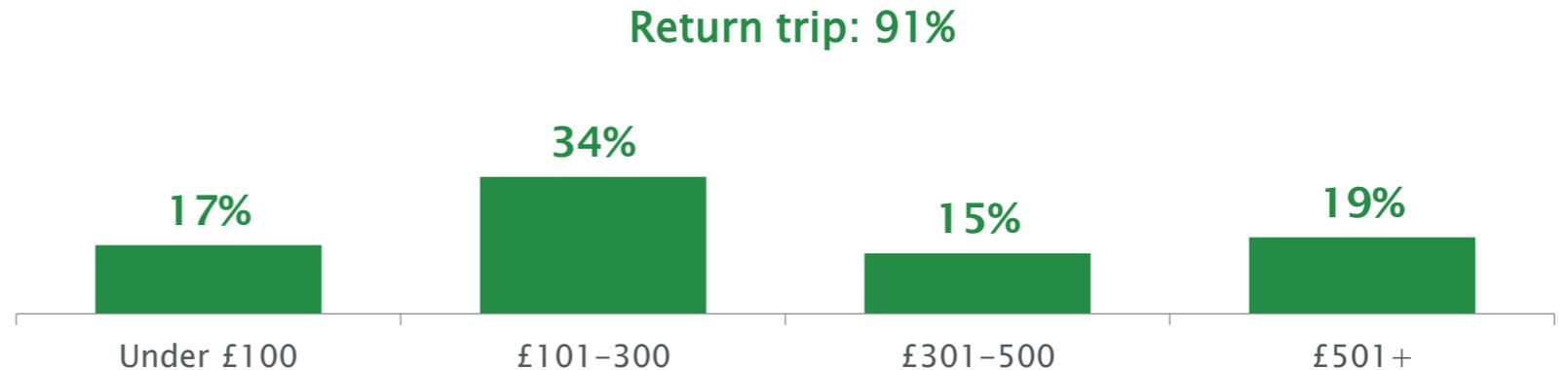
The vast majority of passengers (91 per cent) who flew from a UK airport in the last 10 years purchased a return ticket.

Approaching one in five of those who purchased a return ticket spent under £100 (17 per cent) or over £500 (19 per cent), but overall, return trip passengers were most likely to have spent between £101 and £300 (34 per cent) for their ticket.

Price paid per ticket does not seem to significantly impact satisfaction rates of the overall travel experience.

Price paid for last flight

All those who have flown from a UK airport in the last 10 years



The vast majority of passengers would say that their experience of flying over the last five years is either getting better or is about the same

Around half of passengers (53 per cent) who have flown from a UK airport in the last decade would say that their experience of flying is about the same relative to the last 5 years, and three in ten (28 per cent) would say that flying is getting better.

Only one in seven (15 per cent) would say that, from their experiences of flying over the past 5 years, flying is getting worse.

In particular, passengers from London are significantly more likely than those from other regions to say that flying is getting better (36 per cent), whilst older respondents aged 55+ are more likely to say that flying is getting worse (22 per cent vs. 7 per cent age 18–34).

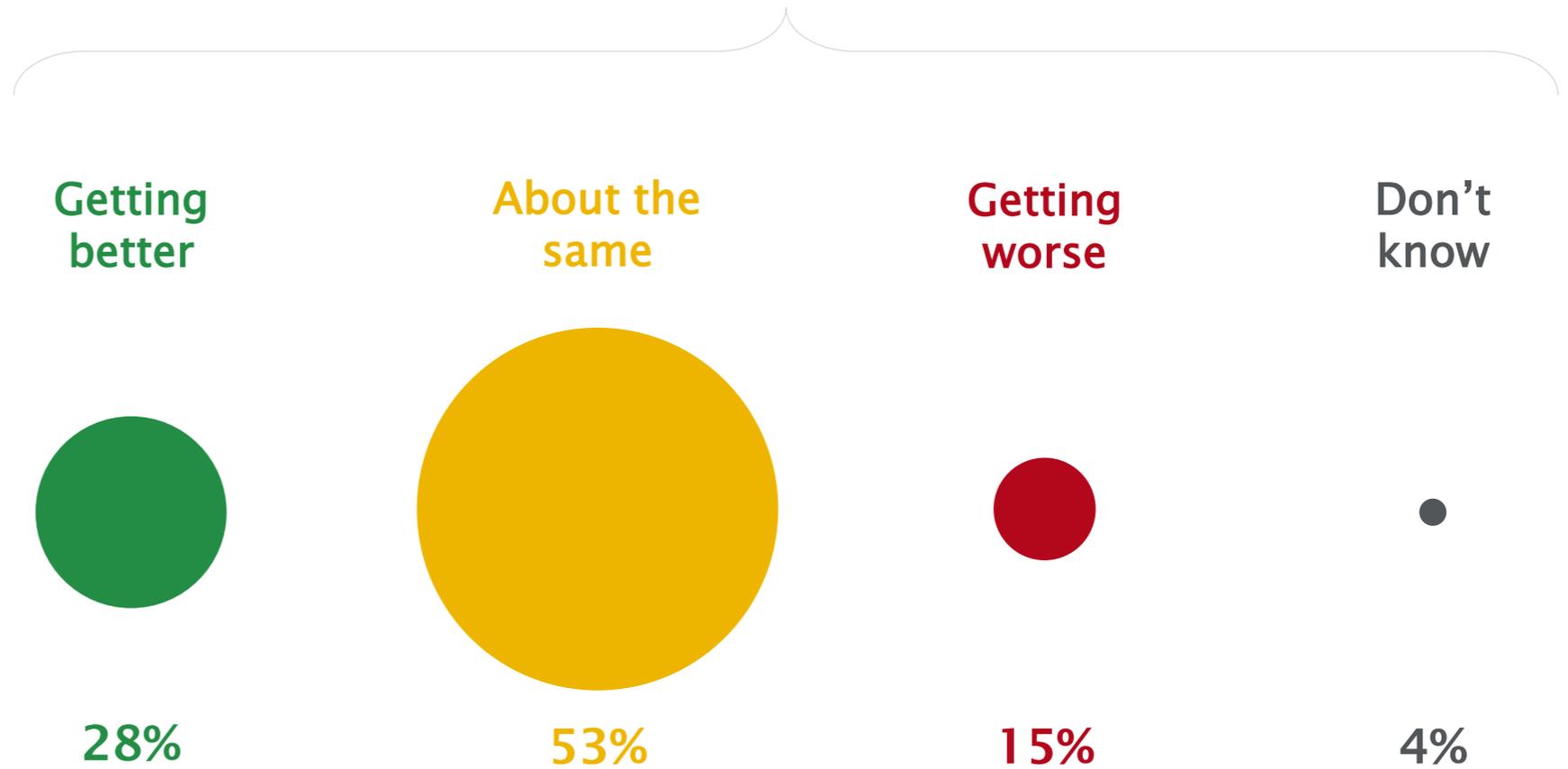
Disabled passengers are also significantly more likely than non-disabled passengers to say that flying is getting better (35 per cent vs. 26 per cent respectively).



Perceptions of flying experience over time

All those who have flown from a UK airport in the last 10 years

Thinking about your experiences of flying over the last five years, would you say that flying is...

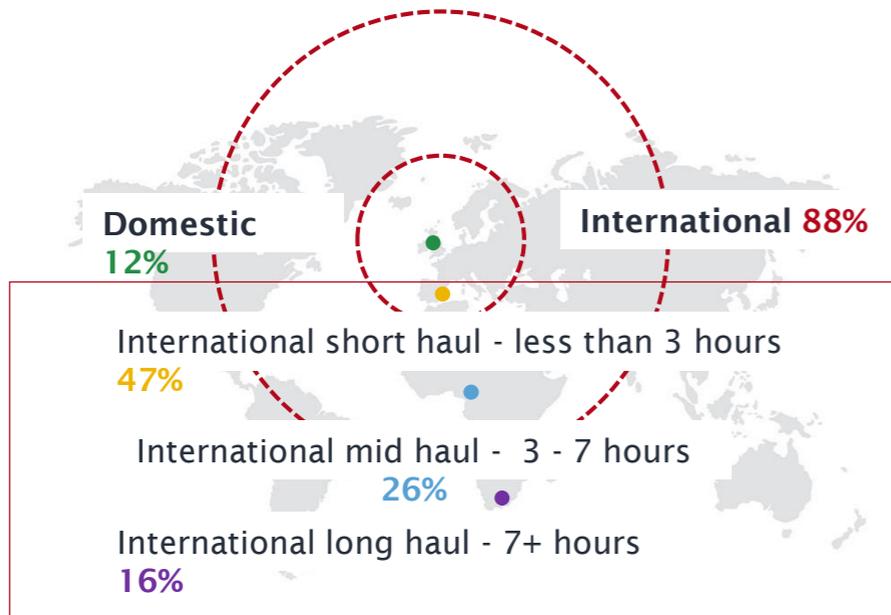




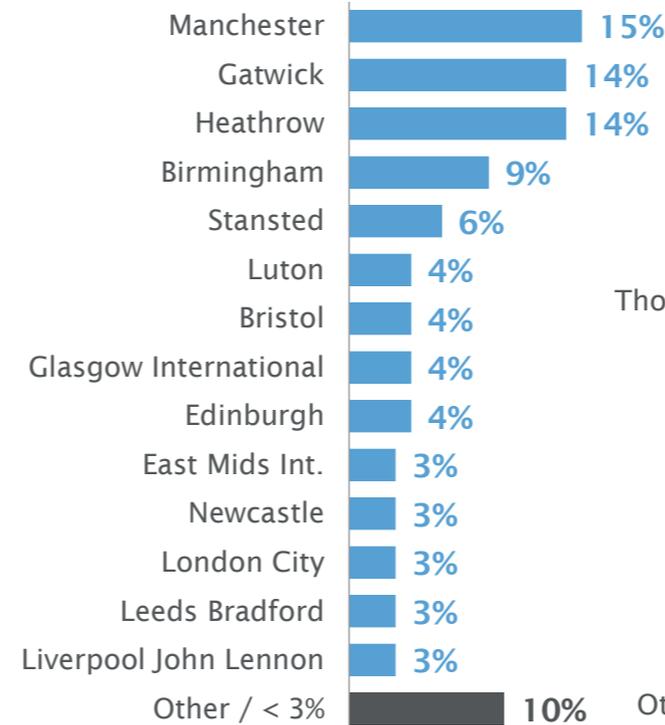
International short haul flights remain the most common flights taken by recent passengers

Domestic or International flight

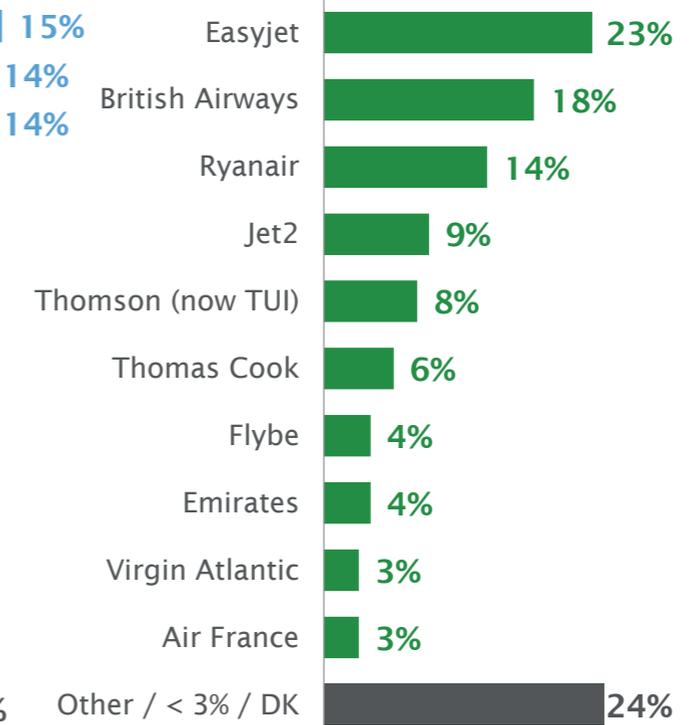
All recent flyers



Departure airport



Airline used



International short haul flights (less than 3 hours long) remain the most common flights taken by those who have flown within the last year (47 per cent). By comparison, only a quarter of recent flyers took international mid haul flights of 3–7 hours, and one in ten took domestic flights (26 per cent and 12 per cent respectively).

Manchester (15 per cent) is the most popular departure airport amongst recent flyers, followed closely by Gatwick (14 per cent), Heathrow (14 per cent) and Birmingham (9 per cent). Approaching a quarter of passengers (23 per cent) recorded Easyjet as the airline they used on their most recent trip, with one in five (18 per cent) using British Airways and one in seven (14 per cent) using Ryanair.

Q17. Earlier you said that you have flown within the last 12 months. We'd like to find out more about your most recent experience of flying. Firstly, was your most recent flight domestic (i.e. within the UK) or international? If international, how long was the flying time? Base: All who have flown from a UK airport in the last 12 months (n=1920)

Q19. Which airline or airlines did you fly with on your most recent trip? Base: All who have flown from a UK airport in the last 12 months (n=1920)

Q20. What was your departure airport in the UK? Base: All who have flown from a UK airport in the last 12 months (n=1920)

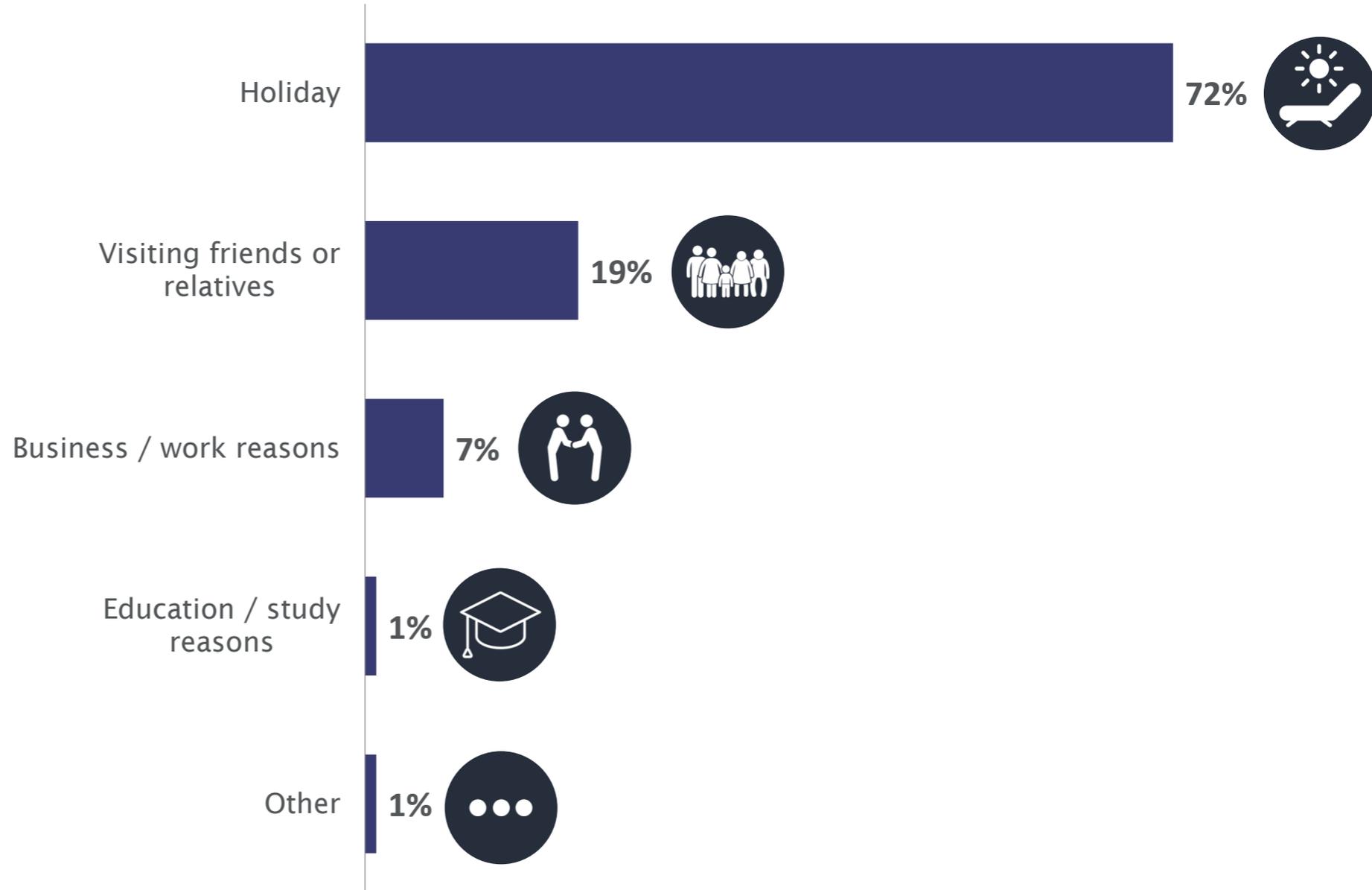
The vast majority of recent flyers travelled for leisure, with fewer than one in ten travelling for business

Seven in ten (72 per cent) recent flyers travelled to go on holiday – the most common reason for flying.

Only one in five (19 per cent) flew to visit friends/relatives, and fewer than one in ten (7 per cent) travelled because of business/work.

Main purpose of last flight

All those who have flown in the last 12 months





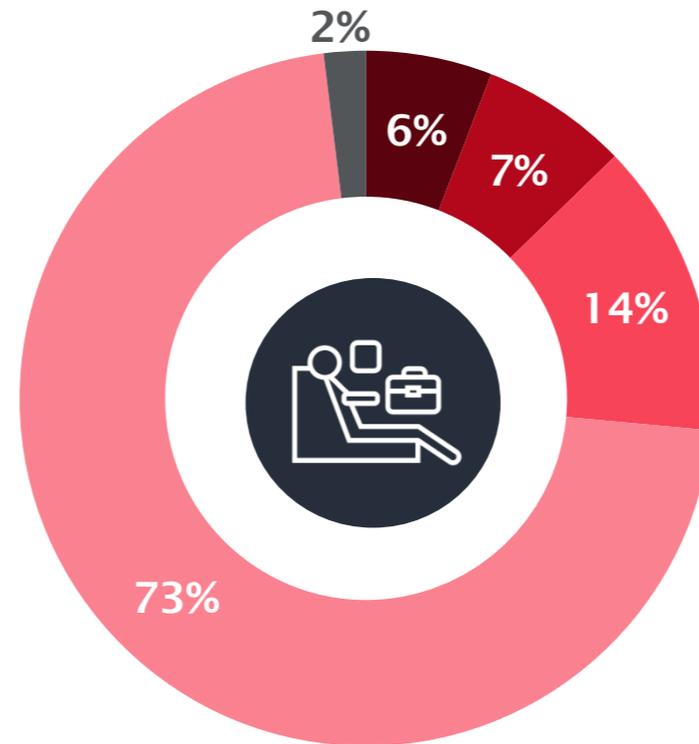
The vast majority of passengers fly economy class, and a similar proportion fly without children

Three-quarters (73 per cent) of recent flyers purchased economy class tickets, with only 6 per cent travelling first class.

The vast majority (73 per cent) of recent flyers travelled without children.

Cabin class

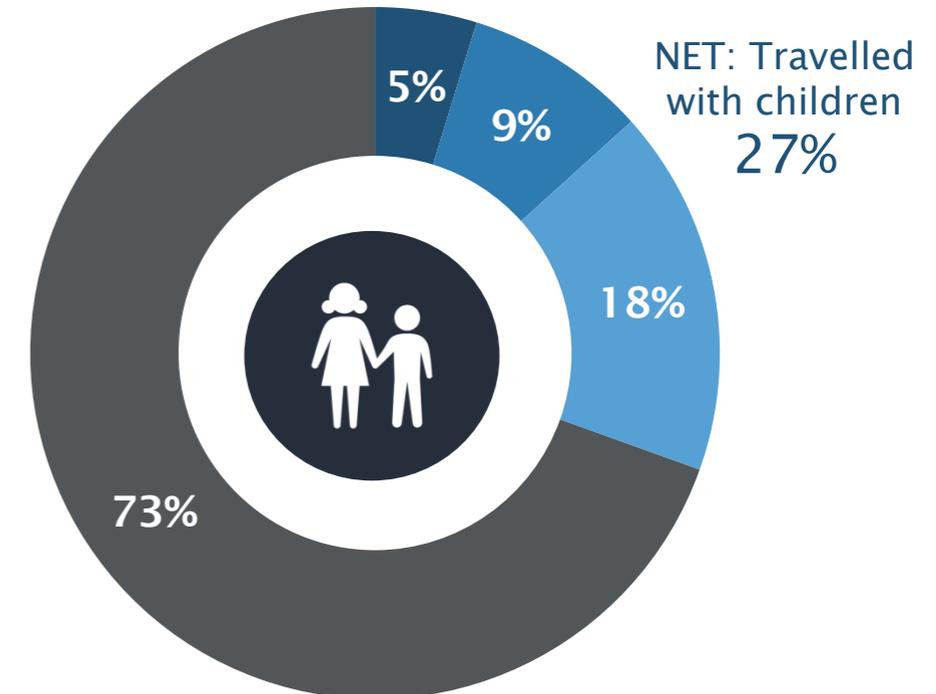
All those who have flown in the last 12 months



- First class
- Business class
- Premium Economy
- Economy
- Don't know

Travelling with children on last flight

All those who have flown in the last 12 months



- Children aged 0-2
- Children aged 3-5
- Children aged 6 - 17
- I did not travel with children

Q21. Which cabin class did you travel in the last time you flew? (If you travelled in different classes for your outbound and return flight, please select all that apply) Base: All who have flown from a UK airport in the last 12 months (n=1920)

Q22. Did you travel with children on this occasion? Base: All who have flown from a UK airport in the last 12 months (n=1920)

Two in five researched their flight directly through the airline and the same proportion booked via this method

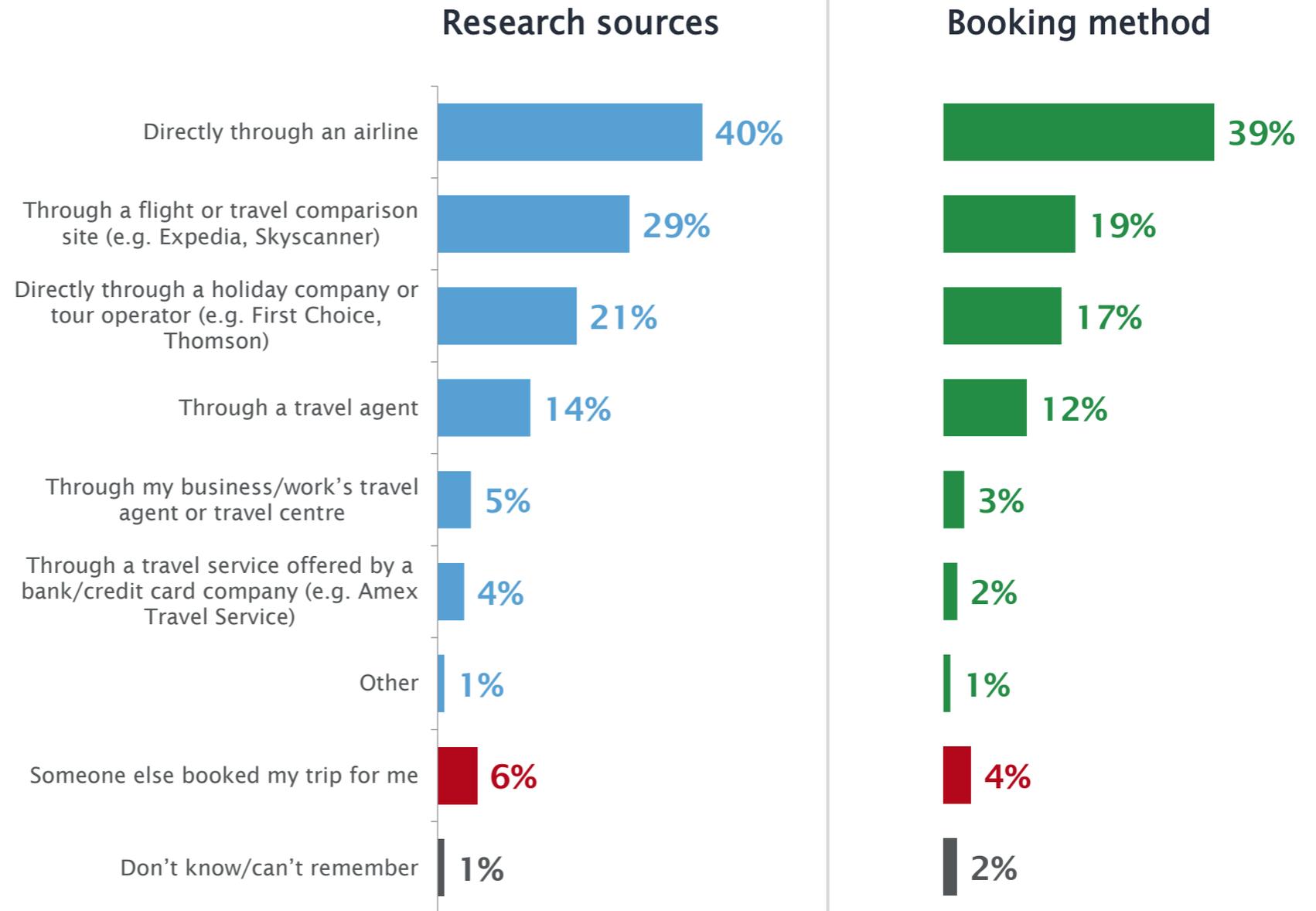
40 per cent of recent flyers used the airline they flew with to research which flight to book – remaining the most popular source for flight information. This is followed by flight or travel comparison sites, with 29 per cent of passengers researching information through this medium, and holiday companies/tour operators (21 per cent).

Two in five (39 per cent) recent flyers booked their tickets directly through the airline, and approaching one in five booked through a travel comparison site or a holiday company/tour operator (19 per cent and 17 per cent respectively).

Younger passengers are significantly less likely to book directly through the airline (31 per cent aged 18–34 vs. 45 per cent aged 35–54) or with a holiday company/tour operator (13 per cent 18–34 vs. 25 per cent 55+), but are more likely to book through a comparison website than their older counterparts (26 per cent 18–34 vs. 12 per cent 55+).

Last flight research/booking method

All those who have flown in the last 12 months



Q24. How did you find information when you were researching which flight to book? Base: All who have flown from a UK airport in the last 12 months (n=1920)

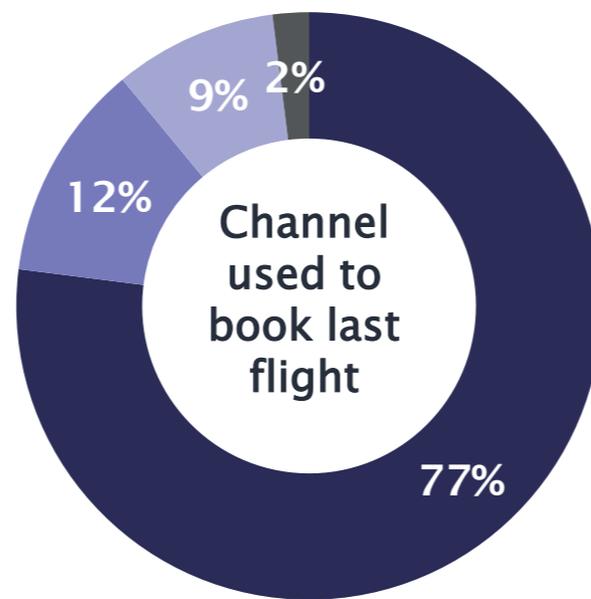
Q25. How was this most recent flight booked? Base: All who have flown in the last 12 months (n=1920)



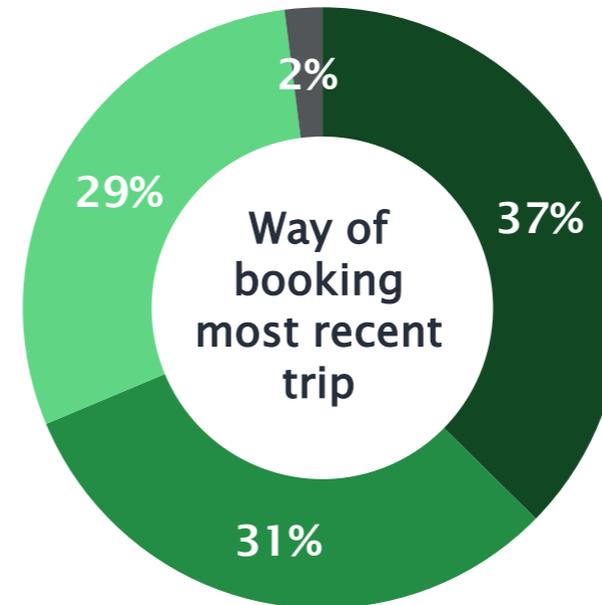
Most passengers booked package trips, online, and through a UK based company

Approaching four in five (77 per cent) recent flyers booked tickets online via a website or app, and roughly seven in ten (69 per cent) booked through a UK based company – representing the vast majority of respondents.

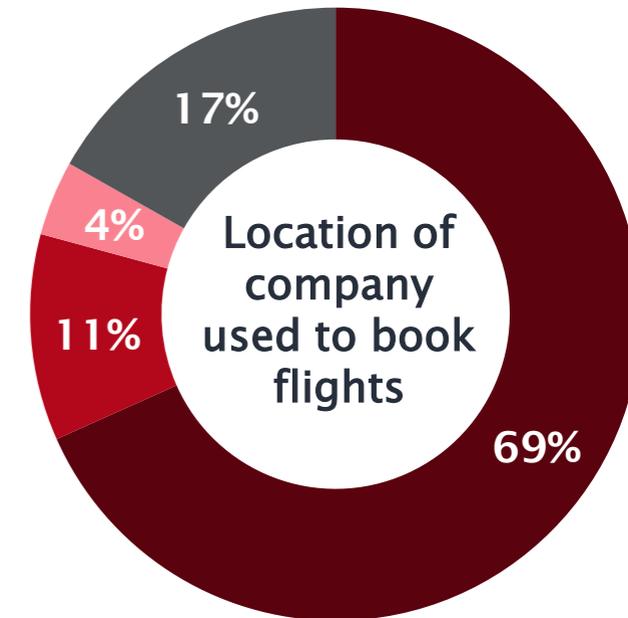
The ways the most recent trip was booked is more varied, with 37 per cent of passengers booking flights and accommodation together from the same company as part of a package, 32 per cent booking flights and accommodation from separate companies, and 29 per cent booking flights only. Package holidays are more popular amongst lower-earners (40 per cent <£50k vs. 31 per cent >£50k), as are face-to-face bookings (13 per cent <£50k vs. 9 per cent >£50k).



- Online via a website or app
- Face-to-face
- Telephone
- Don't know/can't remember



- I booked flights and accommodation together from the same company as part of a package
- I booked flights and accommodation from separate companies
- I only booked flights, I did not need to book accommodation
- Don't know/can't remember



- A UK based company
- A company based outside of the UK but within the EU
- A company based outside of the EU
- I don't know where the company I booked through is based

Q25. How was this most recent flight booked? Base: All who have flown from a UK airport in the last 12 months (n=1920)

Q26. Thinking about how you booked your most recent trip, which of the following statements best applies? Base: All who have flown from a UK airport in the last 12 months (n=1920)

Q27. When booking your trip, where was the company you booked through based? Base: All who have flown from a UK airport in the last 12 months (n=1920)



Section 3

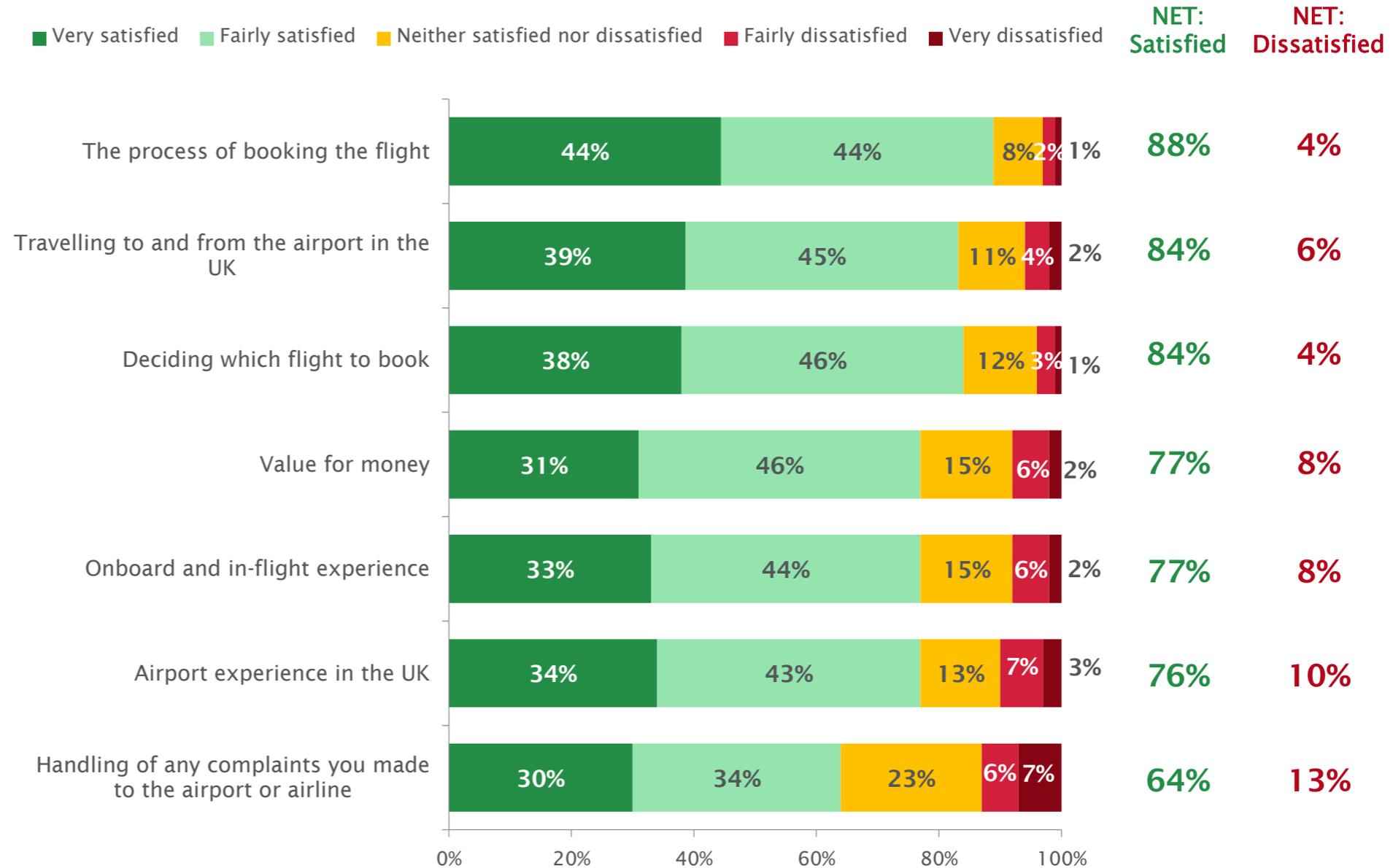
Satisfaction Ratings

Recent flyers are most likely to have been satisfied with the process of booking the flight, deciding which flight to book, or travelling to / from the airport in the UK

A majority of recent flyers say they were satisfied with the different elements of their most recent flight tested, particularly the process of booking the flight (88 per cent), travelling to and from the airport in the UK (84 per cent), or deciding which flight to book (84 per cent).

Although still a majority, recent flyers were least likely to be satisfied with the handling of any complaints they made to their airport or airline (64 per cent). A quarter (23 per cent) were neither satisfied nor dissatisfied while just over one in ten (13 per cent) say they were dissatisfied with how their complaint was handled.

Last flight: Satisfaction with elements of the journey (UK bookings and airports)
All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



Q28. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight. How satisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=808-1908)



Last flight: Satisfaction with elements of the journey (UK bookings and airports) Demographic analysis

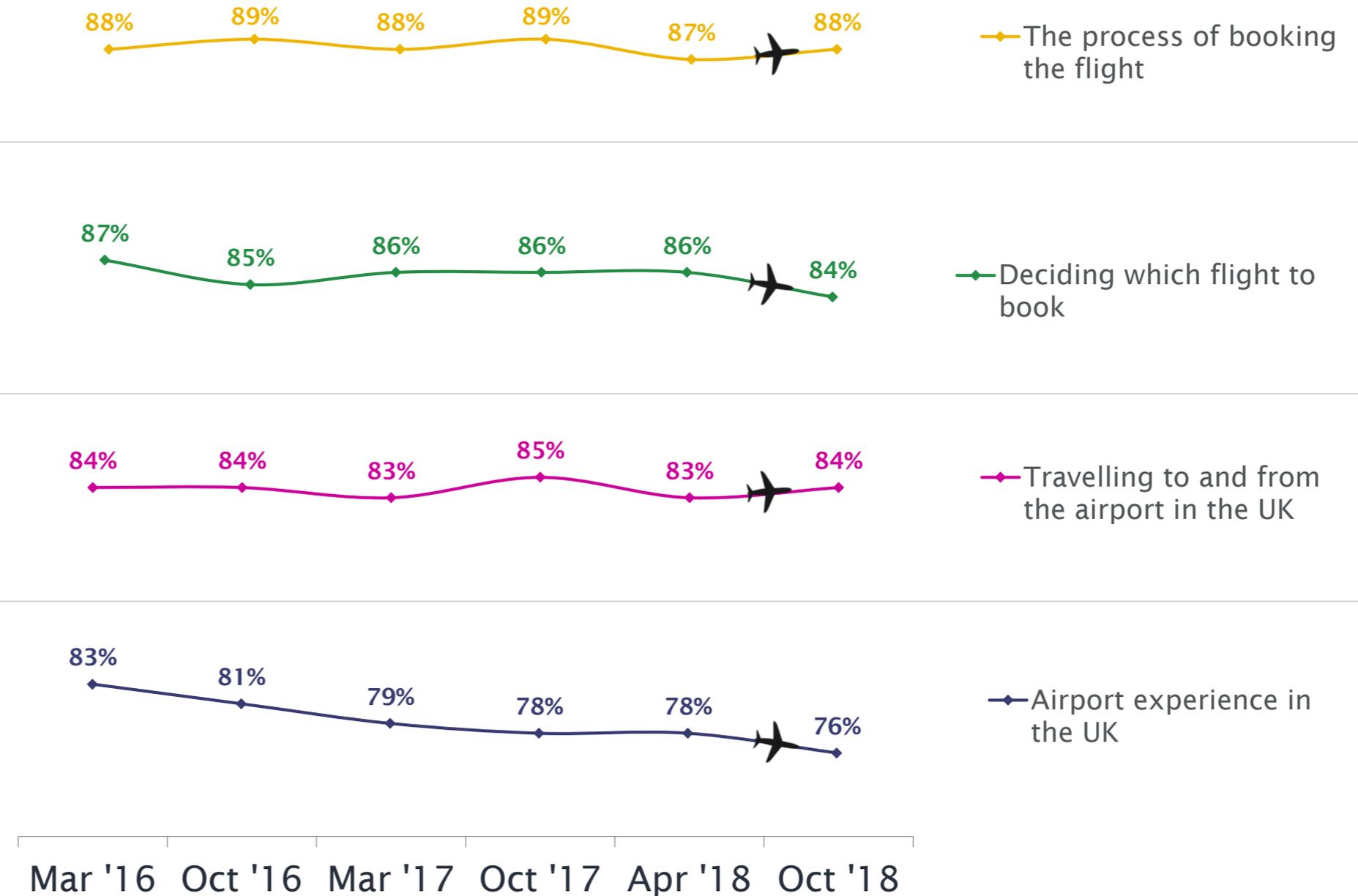
	Satisfied		Dissatisfied
The process of booking the flight	88%		4% ▲ London 7%
Travelling to and from the airport in the UK	84%		6%
Deciding which flight to book	84%		4%
The onboard and in-flight experience	77% ▲ Northern Ireland 88%*		8%
Value for money	77% ▲ Age 55+ 81%		8% ▲ London 12%
The airport experience in the UK	76% ▲ Female 80%		10%
Handling complaints made to the airport/airline	64% ▲ Age 35-54 70%		13% ▲ Age 55+ 17%

With the exception of the airport experience in the UK, levels of satisfaction with each area have remained broadly consistent since Spring 2016

The proportion of recent flyers who say they were satisfied with the process of booking the flight (88 per cent), deciding which flight to book (84 per cent), or travelling to and from the airport in the UK (84 per cent) is broadly in line with that of the previous wave. Moreover, satisfaction levels with these different elements have remained stable since Spring 2016.

The proportion who say they were satisfied with the airport experience in the UK remains broadly in line with those who said the same in the previous wave (76 per cent and 78 per cent respectively), although there has been a steady decline in satisfaction with this element of the journey since March 2016 (83 per cent Mar '16 vs. 76 per cent Oct '18).

Last flight: Satisfaction with elements of the journey – % Satisfied (Part 1)

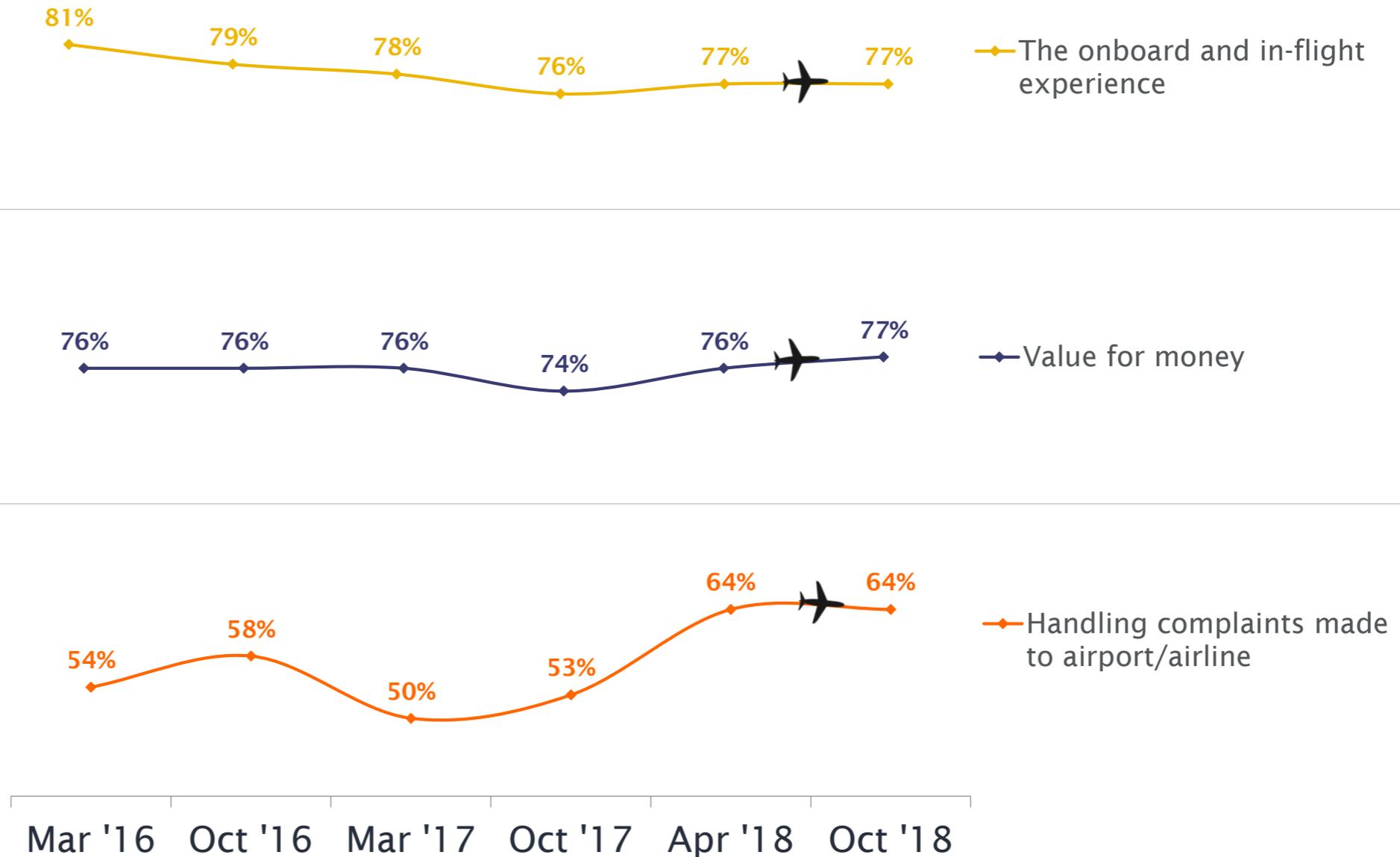


Q28. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight. How satisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=808-1908)

Satisfaction with the flight experience, value for money or handling complaints remains in line with the previous wave

As with the pre-flight experience, satisfaction with the onboard and in-flight experience (77 per cent), value for money (77 per cent) or the handling of any complaints made to the airport / airline (64 per cent) remain in line with levels recorded in April 2018. This indicates a stabilisation of satisfaction levels with regards to complaint handling following a significant increase between October 2017 and April 2018, but there is room for further improvement on this measure.

Last flight: Satisfaction with elements of the journey – % Satisfied (Part 2)



Q28. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight. How satisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=808-1908)



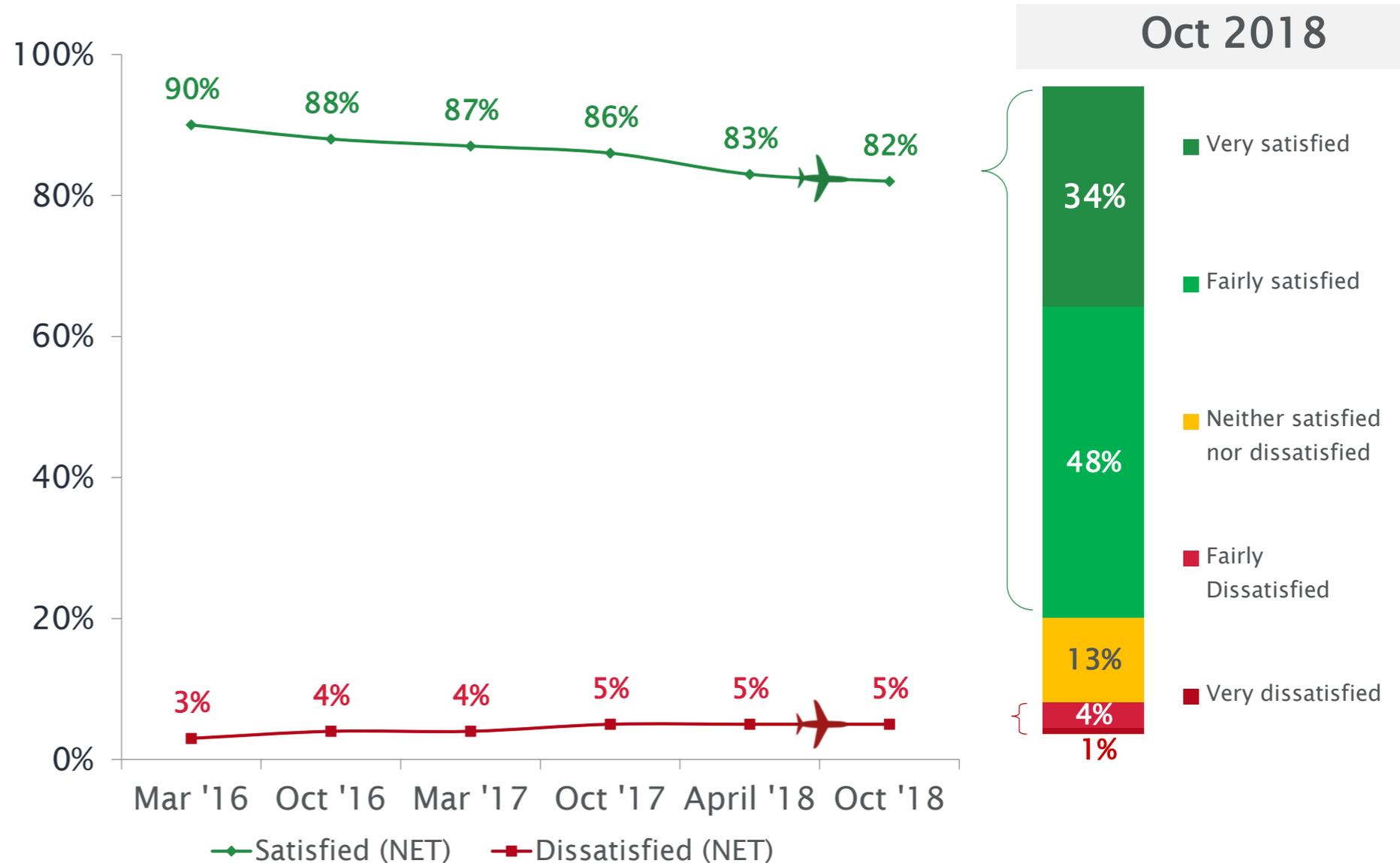
In line with Spring 2018, four in five recent flyers say they were satisfied with the overall travel experience of their most recent flight

Four in five (82 per cent) recent flyers say they were satisfied with the overall travel experience of their most recent flight, with a third saying they were very satisfied with this. Concurrently, only 5 per cent say they were dissatisfied.

Satisfaction with the overall travel experience is in line with the previous wave of research (82 per cent April 2018 vs. 83 per cent in October 2018), although there has nevertheless been a shallow decline since March 2016 (90 per cent).

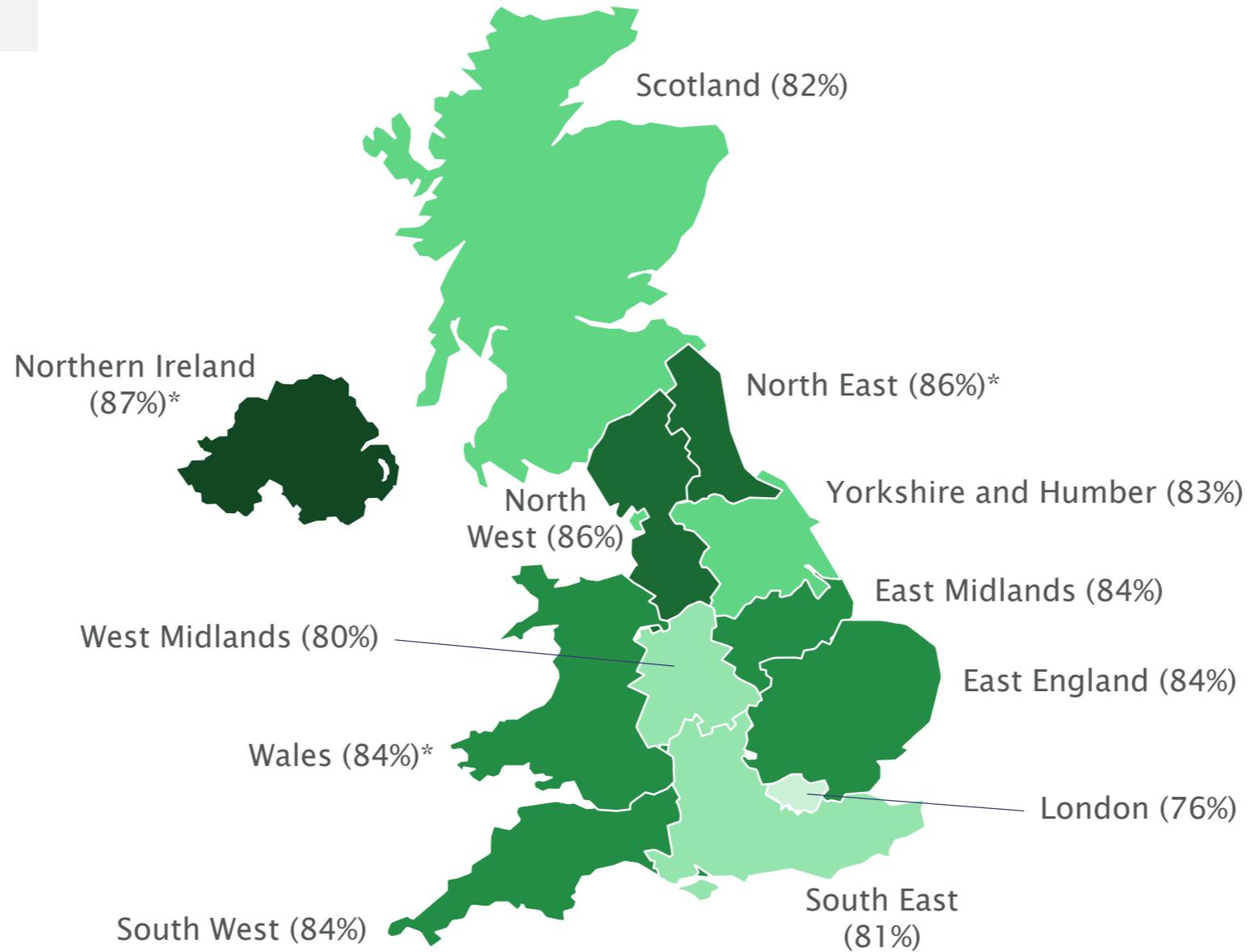
Last flight: Overall satisfaction

All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



Q30. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1911)

Last flight: Satisfaction with overall travel experience – Regional breakdown



When asked openly, flight delays / cancellations are most likely to be cited by recent flyers as the reason for being dissatisfied with the overall travel experience

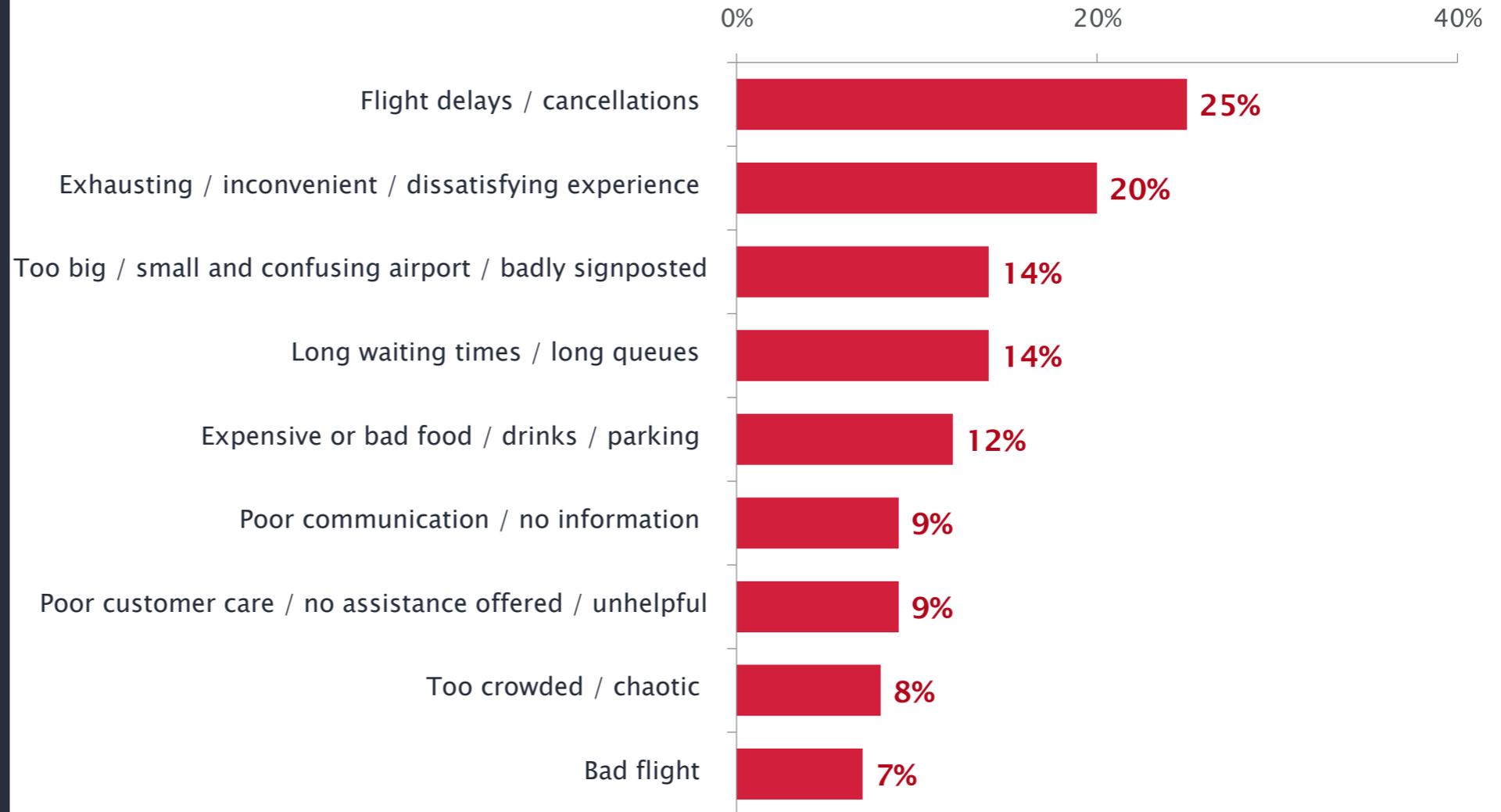
Flight delays / cancellations are most likely to be given as the reason for being dissatisfied with the overall travel experience (25 per cent), an issue which is raised considerably more frequently than in Spring 2018 (7 per cent). One in five also say that they were dissatisfied because they found the experience 'exhausting' or 'inconvenient' (20 per cent).



Understanding dissatisfaction with travel experience

Coded open-text responses, showing all responses of 7% +

% who were dissatisfied with their overall travel experience (on last flight) on reasons they were dissatisfied



*Q31. Why were you dissatisfied with the overall travel experience? Please tell us about any issues you had. Base: All who have flown in the last 12 months and were dissatisfied with the overall experience (n=98)**

At least four in five recent flyers were satisfied with each aspect, particularly with navigating around and finding their way to the gate in the UK airport

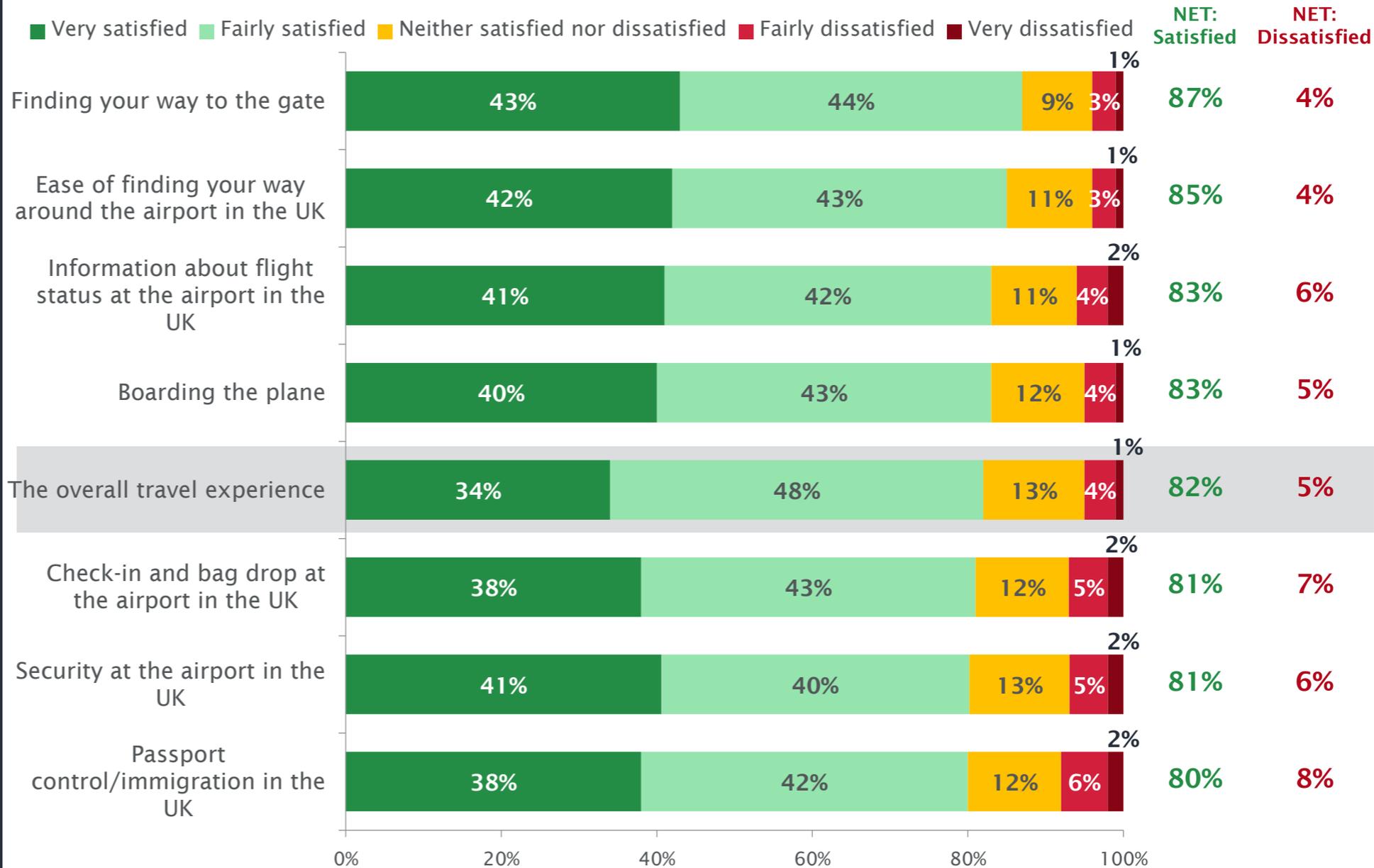
When asked about their most recent flight, recent flyers are most likely to have been satisfied with finding their way to the gate (87 per cent), although at least four in five were also satisfied with aspects such as navigating around the airport (85 per cent) or checking in (81 per cent), security (81 per cent), or passport control in the UK (80 per cent).

Those aged 55+ are significantly more likely than their younger counterparts to be satisfied with most of different elements tested. This is most pronounced regarding information about the flight status at the airport in the UK (89 per cent 55+ vs. 76 per cent 18–34) and check-in and bag drop at the airport in the UK (87 per cent 55+ vs. 74 per cent 18–34).

Last flight: Satisfaction with airport experience (UK) – Part 1



All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



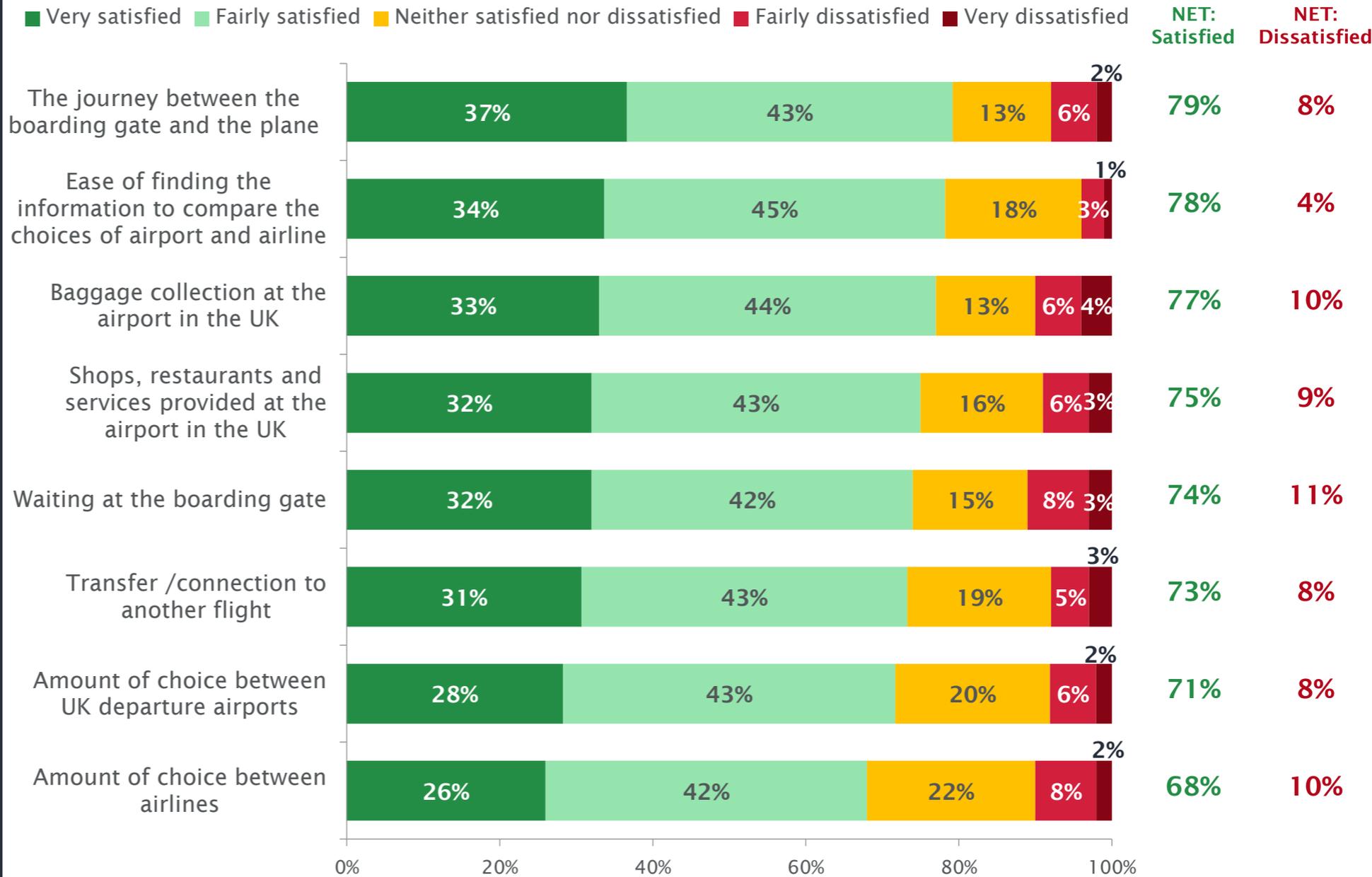
Q30. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=903–1916)

Recent passengers are least likely to have been satisfied with the amount of choice between airlines for their most recent flight

At least seven in ten passengers were satisfied with the remaining elements of their most recent journey. They are least likely to have been satisfied with the amount of choice between airlines (68 per cent) and one in ten were dissatisfied with this (10 per cent). Dissatisfaction with the other elements is relatively low, although one in ten say they were dissatisfied with waiting at the boarding gate (11 per cent) or baggage collection at the airport in the UK (10 per cent).

Last flight: Satisfaction with airport experience (UK) – Part 2

All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



Q30. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=903-1916)



**Last flight:
Satisfaction
with airport
experience (UK)
– Demographic
analysis**

	Satisfied		Dissatisfied	
Finding your way to the gate	87%	▲ Age 55+ 93% ▲ Retired 91%	4%	
Ease of finding your way around the airport	85%	▲ Age 55+ 90% ▲ Employed part-time 87% Retired 89%	4%	
Information about flight status	83%	▲ Age 55+ 89% ▲ North East 90%*	6%	▲ Age 18–34 10% ▲ South West 11%
Boarding the plane	83%	▲ Age 55+ 88% ▲ North East 91%*	5%	▲ Age 18–34 7% ▲ Homemaker 13%*
The overall travel experience	82%	▲ Over 40 miles from airport 87%	5%	
Check-in and bag drop	81%	▲ Age 55+ 87%	7%	
Security at the airport	81%	▲ Age 55+ 86%	6%	▲ Northern Ireland 16%*
Passport control / immigration	80%		8%	
The journey between the boarding gate and plane	79%	▲ Over 40 miles from airport 84%	8%	
Ease of finding the information to compare the choices of airport and airline	78%		4%	
Baggage collection at the airport	77%		10%	
Shops, restaurants and services at the airport	75%		9%	▲ Yorkshire and Humber 14%
Waiting at the boarding gate	74%	▲ Age 55+ 80% ▲ North East 85%*	11%	
Transfer/connection to another flight	73%	▲ Over 40 miles from airport 81%	8%	▲ Retired 14%
Amount of choice between UK departure airports	71%		8%	▲ Wales 17%*
Amount of choice between airlines	68%	▲ Age 35–54 73%	10%	▲ East Midlands 15%

Q30. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=903–1916)

Levels of satisfaction with each element of the pre-booking process are broadly consistent with the previous wave

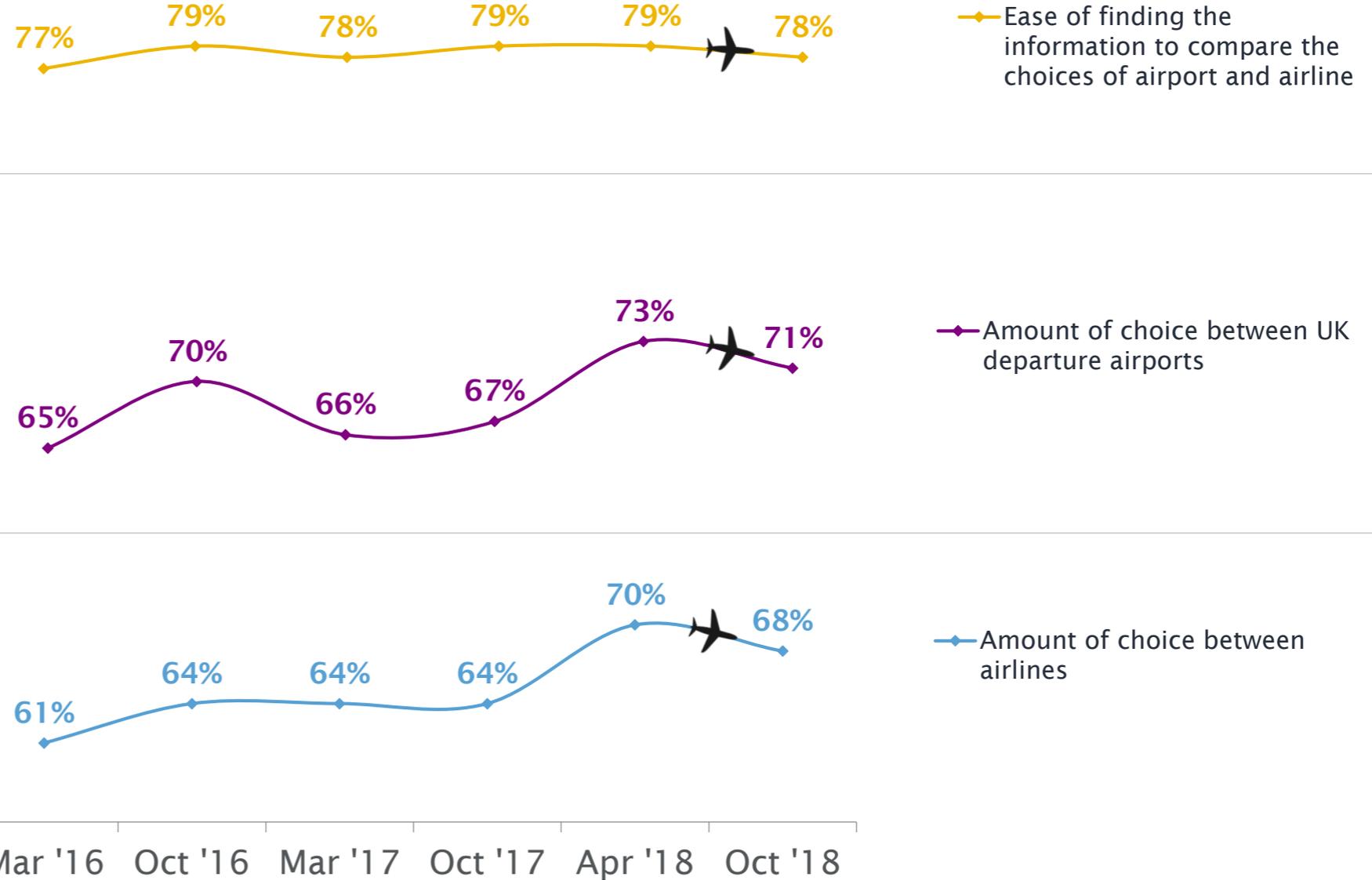
As in each wave since March 2016, around eight in ten passengers say they were satisfied with the ease of finding the information to compare the choices of airport and airline.

Seven in ten say they were satisfied with the amount of choice between UK departure airports (71 per cent) or the amount of choice between airlines (68 per cent). This is consistent with the satisfaction levels recorded in April 2018, following an increase from October 2017.



Last flight: Satisfaction with elements of pre-booking

% Satisfied (NET)



Q30. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1735-1753)

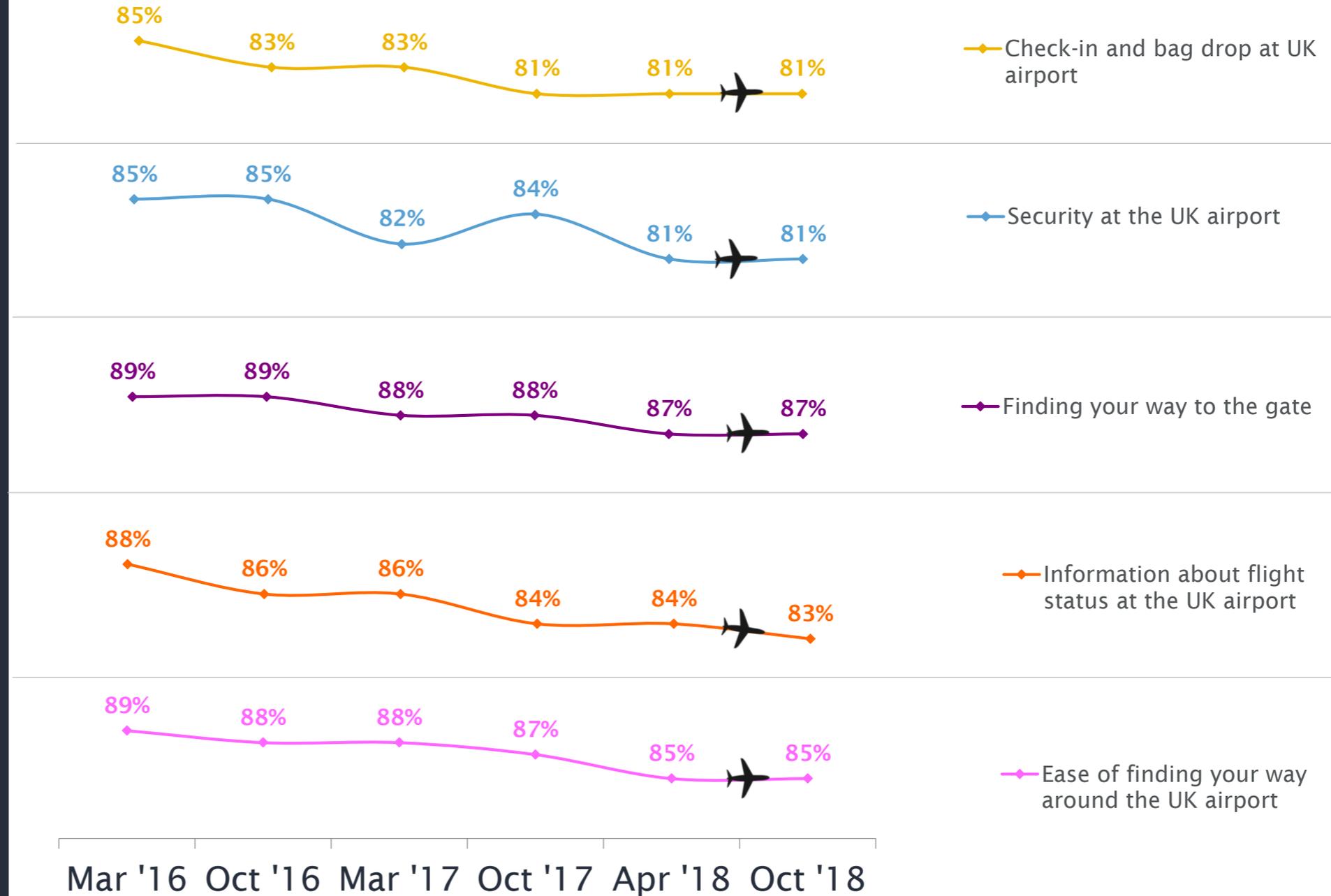
Satisfaction with check-in and bag drop, information about flight status, and ease of navigating around the airport has each declined slightly since Spring 2016

Recent flyers' satisfaction with each area of the UK airport experience is consistent with the levels recorded in April 2018. Nevertheless, satisfaction levels have seen a shallow decline in most areas since March 2016, particularly regarding check-in and bag drop (81 per cent Apr '18 vs. 85 per cent Mar '16), information about flight status (83 per cent vs. 88 per cent) or the ease of finding their way around the UK airport (85 per cent vs. 89 per cent).

Last flight: Satisfaction with airport experience - Part 1



% Satisfied (NET)



Satisfaction with transfers / connections to another flight has decreased since the previous wave, while satisfaction with each of the other areas has remained broadly consistent – though baggage collection continues on a long-term shallow decline

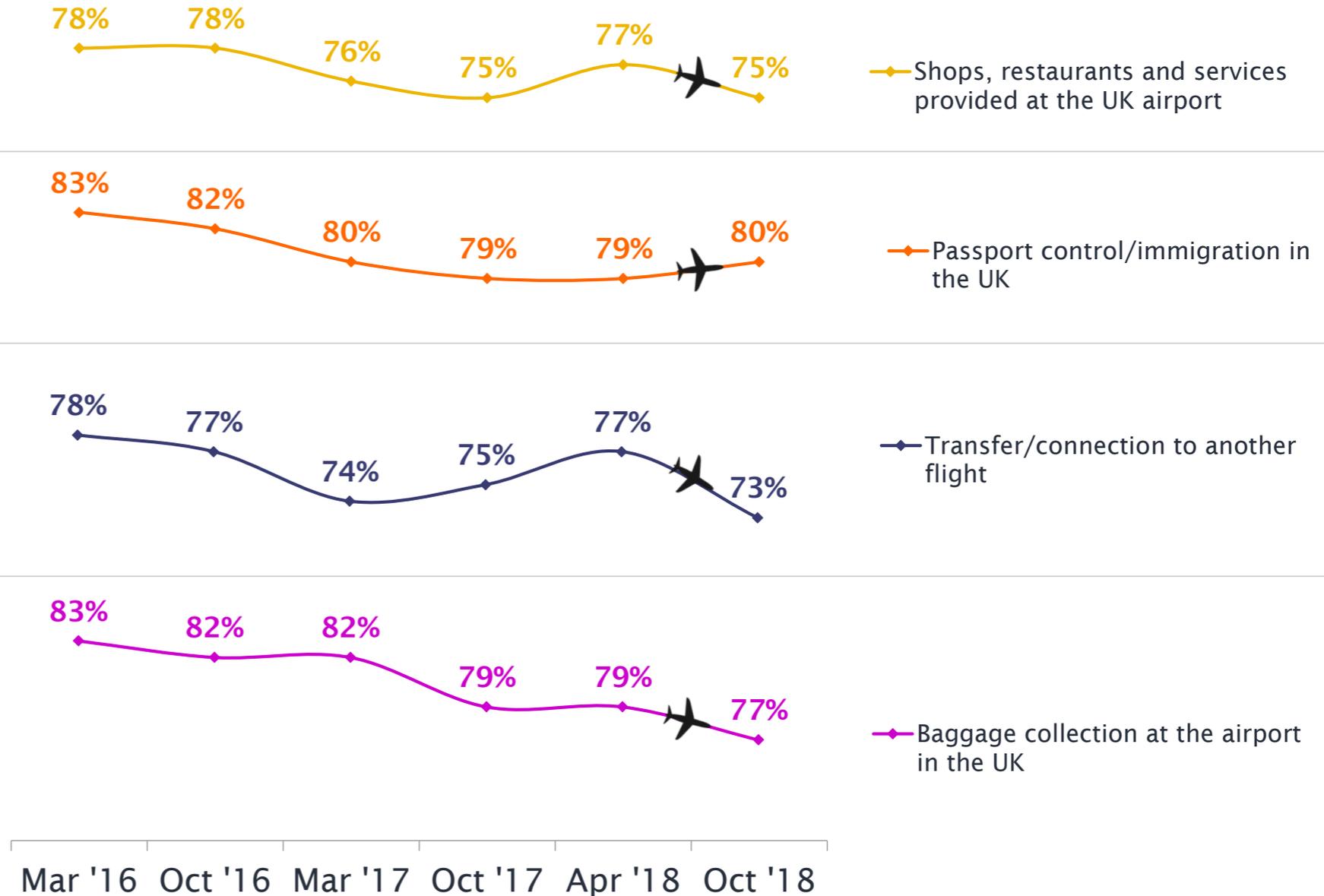
Levels of satisfaction with shops, restaurants and services provided at the UK airport (75 per cent) or with passport control / immigration (80 per cent) has remained largely consistent both compared to the previous wave of research, and since March 2016.

Satisfaction with transfer / connections to another flight has decreased compared to the previous wave (73 per cent Autumn 2018 vs. 77 per cent Spring 2018). Similarly, levels of satisfaction with baggage collection at the airport in the UK have steadily decreased since tracking began (77 per cent Autumn 2018 vs. 83 per cent Spring 2016).

Last flight: Satisfaction with airport experience – Part 2



% Satisfied (NET)





Section 4

Travel Disruption



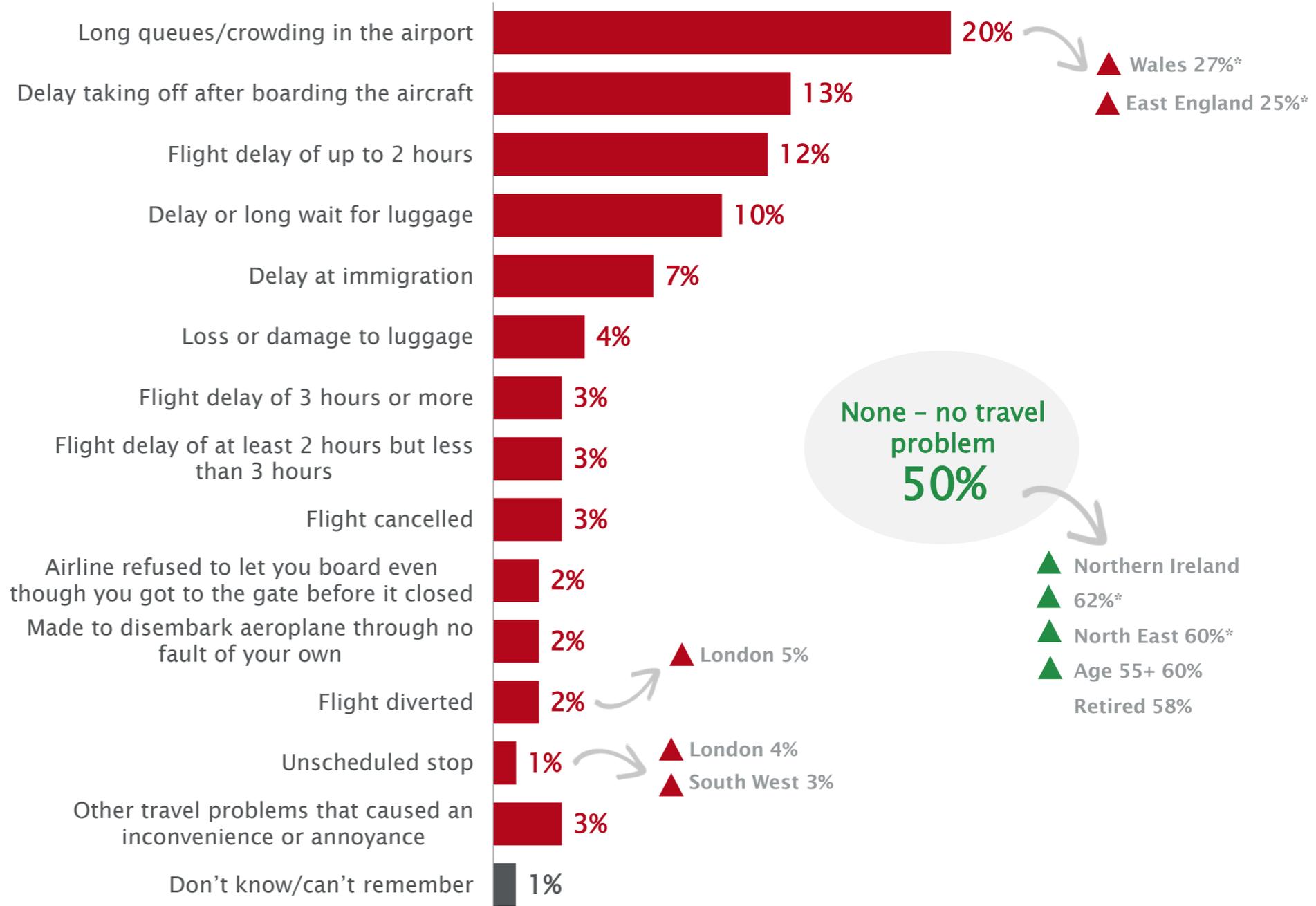
Experience of recent flight issue(s)

All who have flown in the last 12 months

Long queues/crowding in the airport is the most commonly experienced travel issue

As in Spring 2018, the travel issue most commonly experienced among recent flyers remains long queues/crowding in the airport (20 per cent vs. 19 per cent Spring 2018). This is followed by a delay taking off after boarding the aircraft (13 per cent vs. 11 per cent Spring 2018), a flight delay of up to 2 hours (12 per cent vs. 9 per cent Spring 2018), and a delay or long wait for luggage (10 per cent vs. 8 per cent Spring 2018).

While half of recent flyers say they did not experience any travel problems, this has dropped by 6 percentage points since Spring 2018 (56 per cent vs. 50 per cent).



Q39. During this most recent journey, did you experience any of the following issues? Please count onward and return flights and any transfers as one journey. Base: All those who have flown in the last 12 months (n=1920)

More than half of recent flyers who experienced travel issues received information on the cause of the problem, most commonly from the airline

More than half of recent flyers who experienced any travel issue say they received information on the cause of the issue(s), compared to two in five who say they did not receive any information (54 per cent vs. 41 per cent respectively).

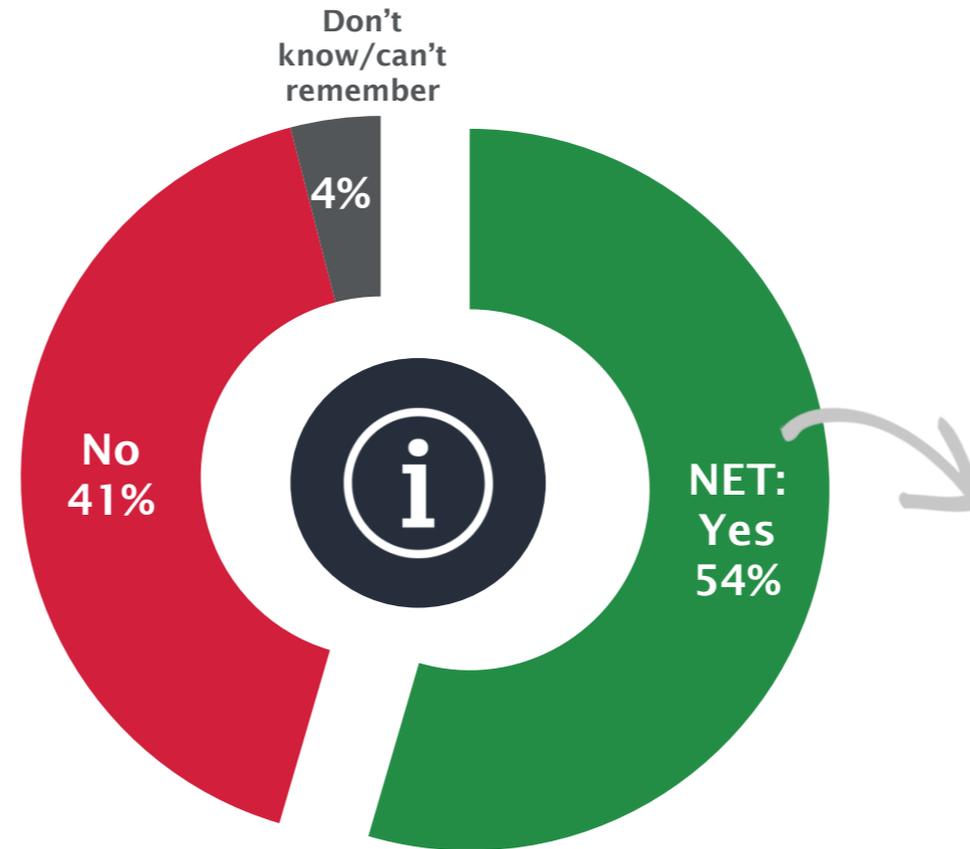
Three in five of those who were informed say they received information from the airline itself (59 per cent), while two in five say they were informed by the airport (43 per cent).

Those living in Yorkshire and Humber, the West Midlands and London are the most likely to say that they received information (66 per cent, 62 per cent and 60 per cent respectively), while those from Wales are the least likely to say so (33 per cent).

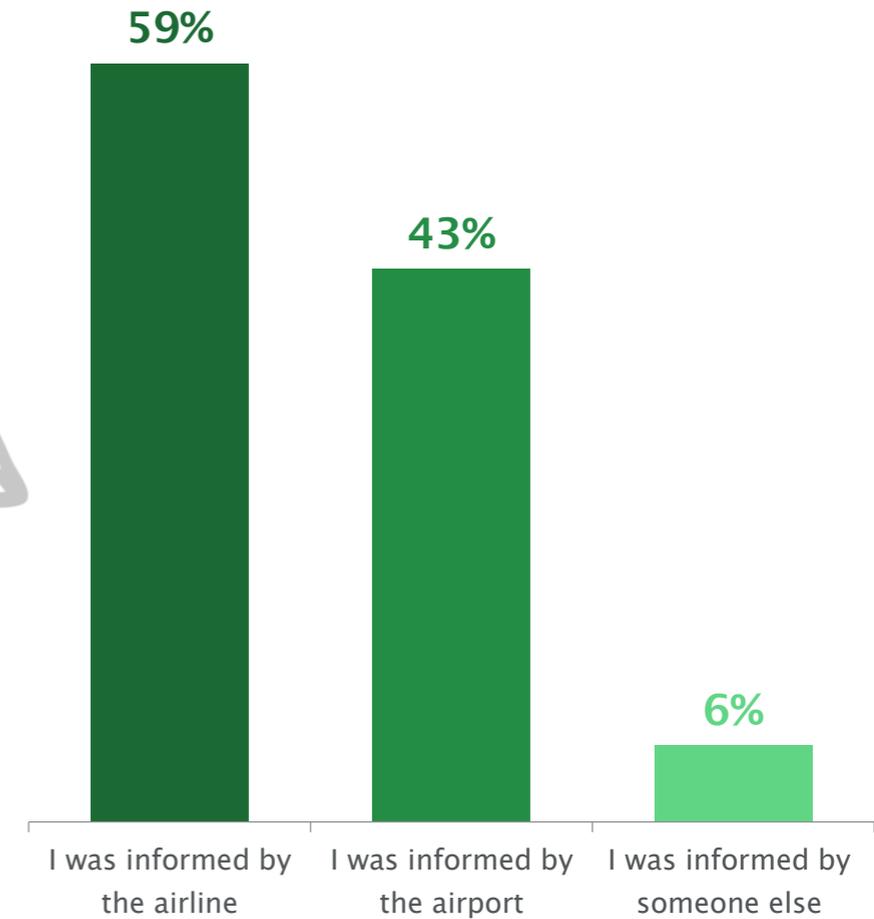


Receiving information on travel issues

Receiving information on the cause of the issue(s)
All who have flown in the last 12 months and experienced travel issue(s)



Source of information
All who have flown in the last 12 months and experienced travel issue(s) and received information



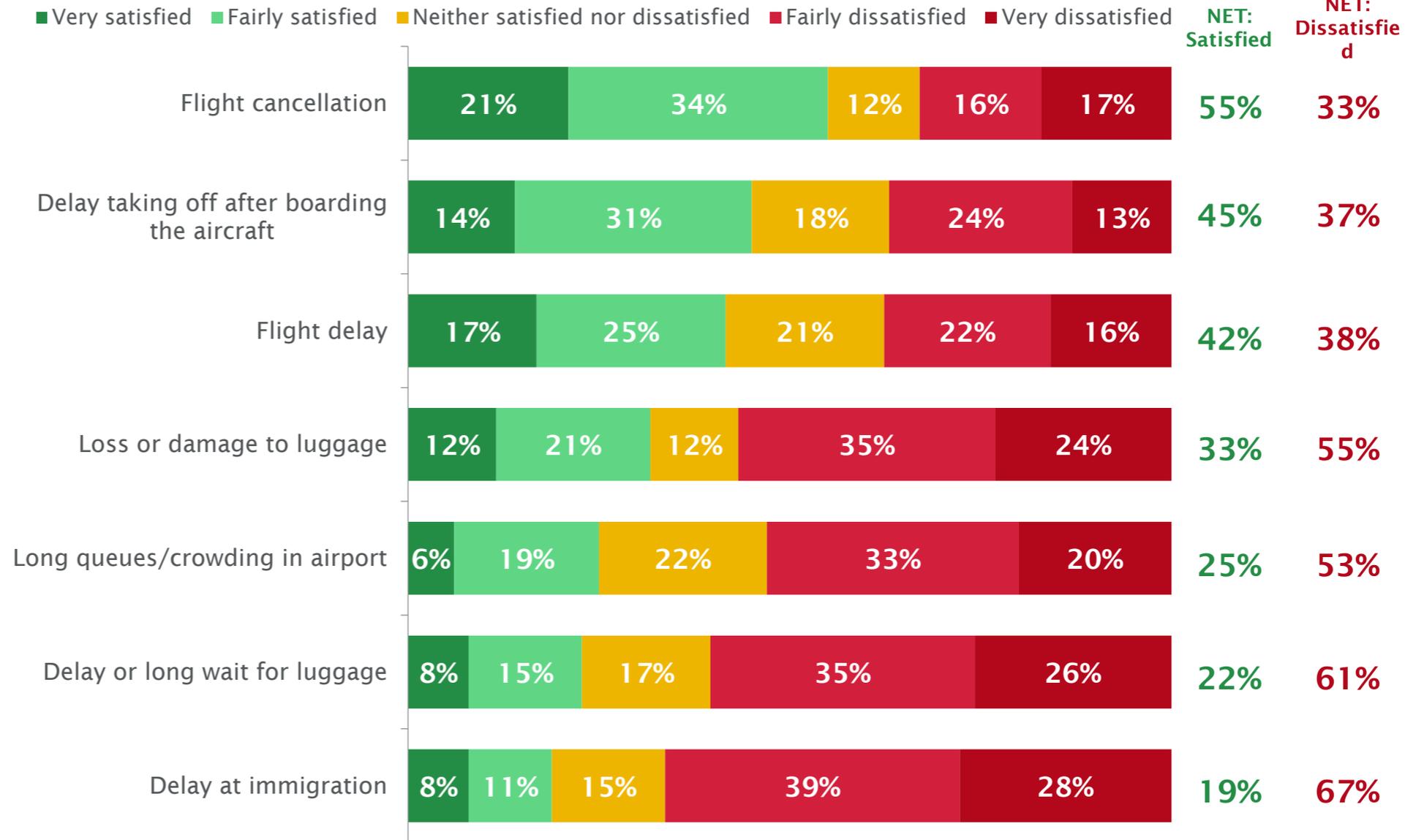
Q40. Were you informed of the cause of the issue(s) you experienced on your most recent journey? Please count outward and return flights and any transfers as one journey. Base: All who have flown in the last 12 months and experienced travel issues (n=939) Base: All who have flown in the last 12 months and experienced a travel problem excluding 'No' and 'Don't know / can't remember' responses (n=508)

Levels of satisfaction with the handling of the most commonly experienced travel issues are relatively low

Recent flyers are most likely to be satisfied with how a flight cancellation was dealt with (55 per cent), although a third say they were dissatisfied (33 per cent). Passengers who experienced delays at immigration (19 per cent satisfied vs. 67 per cent dissatisfied), or a delay or long wait for luggage (22 per cent satisfied vs. 61 per cent dissatisfied) show the highest levels of dissatisfaction with how these issues were handled.

Satisfaction with how each travel issue was handled

All who have flown in the last 12 months and experienced a travel problem, excluding 'Don't know' responses



Showing bases n=50+

Q41. How satisfied or dissatisfied were you with the way your travel issue was handled overall / with the way each of the following travel issues were handled overall? Base: All who have flown in the last 12 months and experienced travel issues excluding 'Don't know' responses (n=52-374)

Poor communication, insufficient information and long waiting times are the most common reasons for being dissatisfied with the way a travel issue was handled

When asked about why they were dissatisfied with the way their flight issue(s) were handled, passengers are most likely to refer to poor communication/insufficient information (37 per cent), or long waiting times/queues (26 per cent).

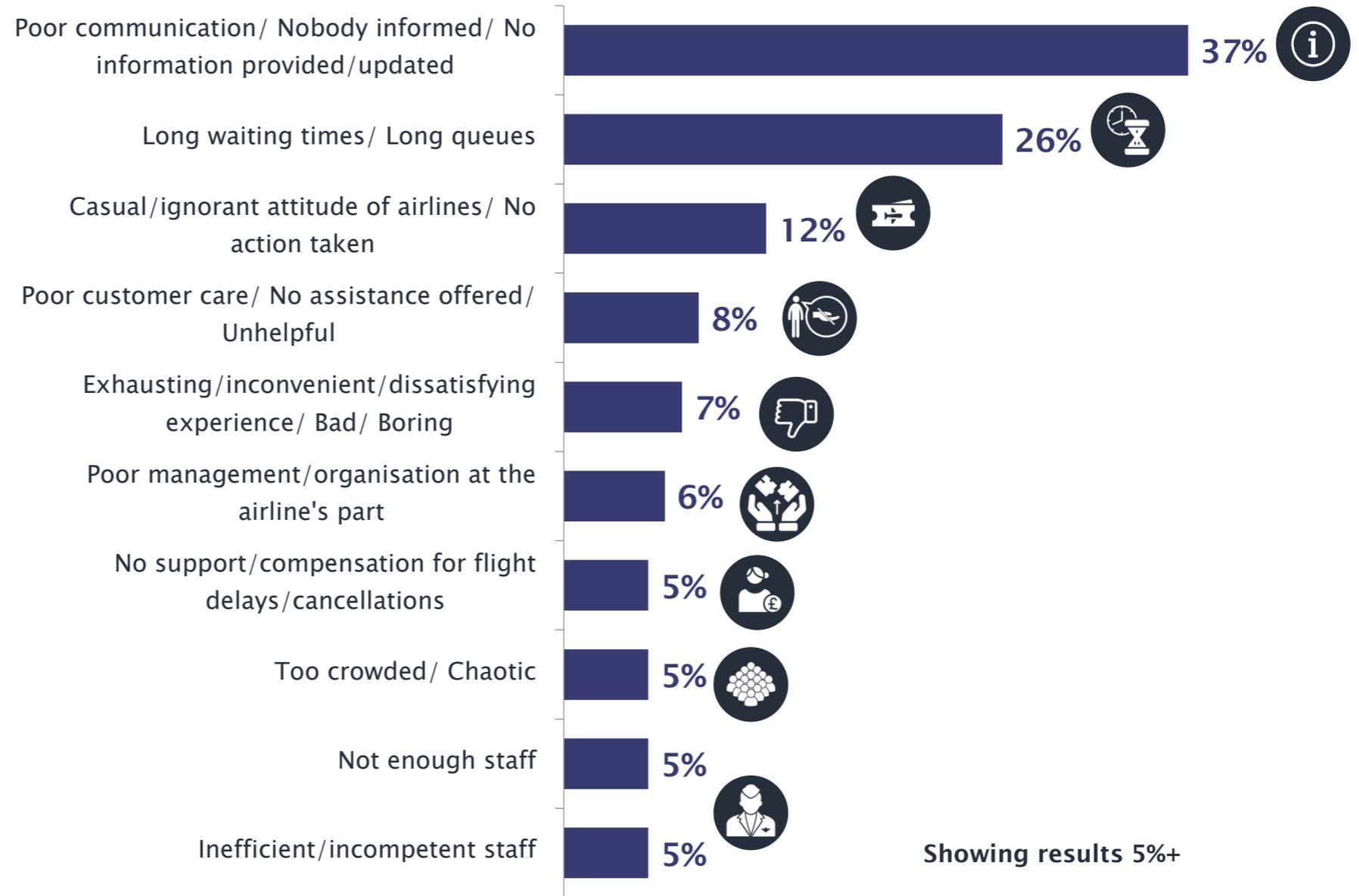
Around one in ten mentions the casual/ignorant attitude of airlines and the lack of action taken by airlines (12 per cent), or poor/unhelpful customer care or lack of assistance (8 per cent).

Dissatisfaction due to the overall bad/boring experience (7 per cent), poor management/organisation on the airline's part (6 per cent), lack of support/compensation for flight delays/ cancellations (5 per cent), crowd/chaos at the airport (5 per cent), or staff shortage/incompetence (5 per cent for each) are also identified by a significant minority of respondents.

Reasons for being dissatisfied with the way a travel issue was handled



All who have flown in the last 12 months, experienced a travel issue(s) and were dissatisfied with the outcome



Q42. Why were you dissatisfied with the way your flight issue was / flight issues were handled? Base: All who have flown in the last 12 months, experienced a travel problem, and were NET: Dissatisfied with the outcome (n=423). N.B. Chart excludes code 'flight delays/cancellations'.



Section 5

Complaint Handling and Alternative Dispute Resolution

Half of those who experienced any travel issue(s) did not take any action

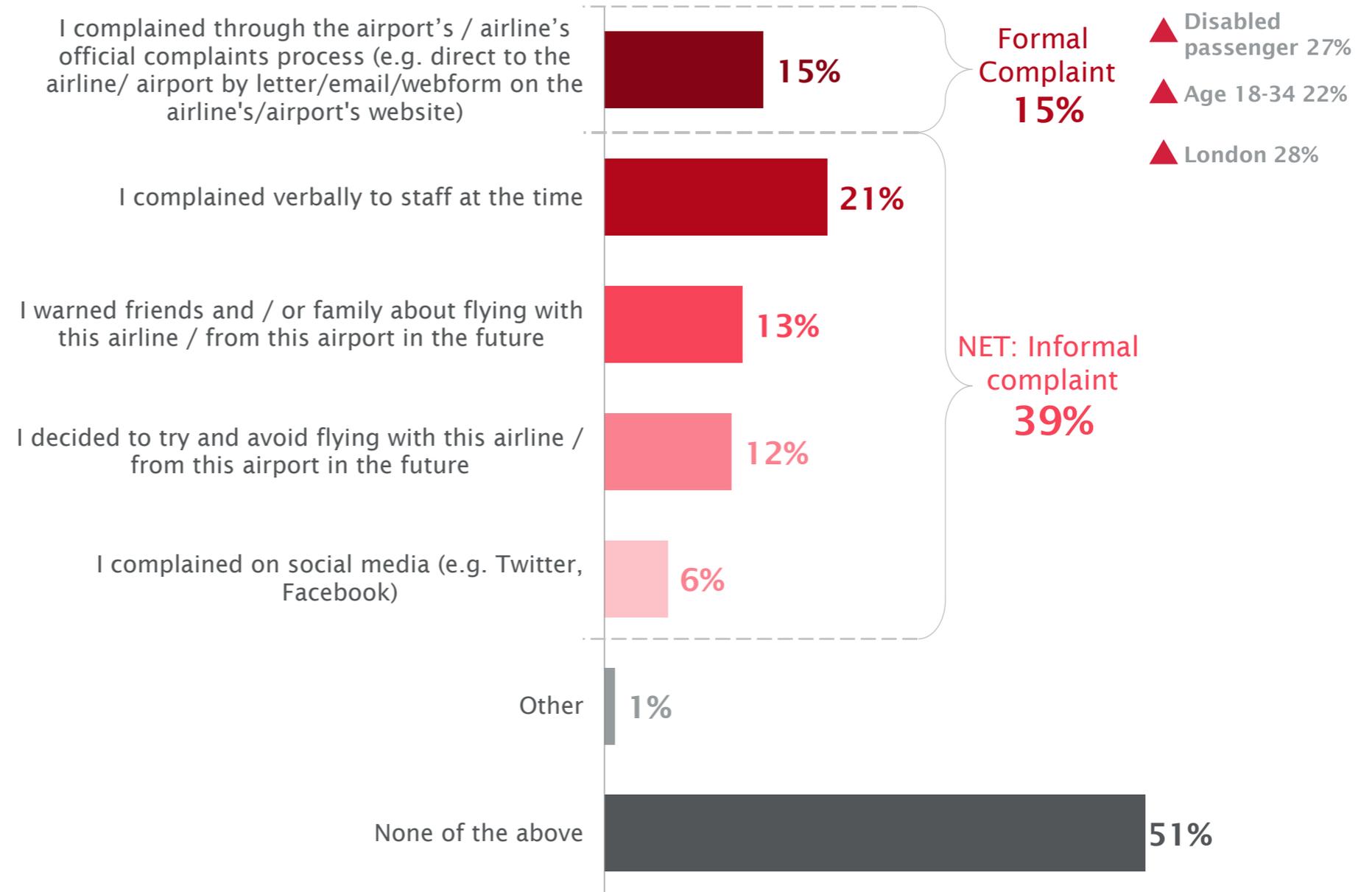
Those who complained about experiencing their flight issue(s) are more likely to have done so informally than formally.

One in seven recent flyers who experienced a flight issue made a formal complaint compared to two in five of those who made an informal complaint (15 per cent vs. 39 per cent respectively).

Within this, respondents are most likely to say they complained verbally to staff at the time (21 per cent) and/or through the airport's/airline's official complaints process (15 per cent). This highlights the importance of the efficiency and transparency of these engagement processes between passengers and airlines/airports.

Reacting to flight issue(s)

All who have flown in the last 12 months and experienced a travel problem



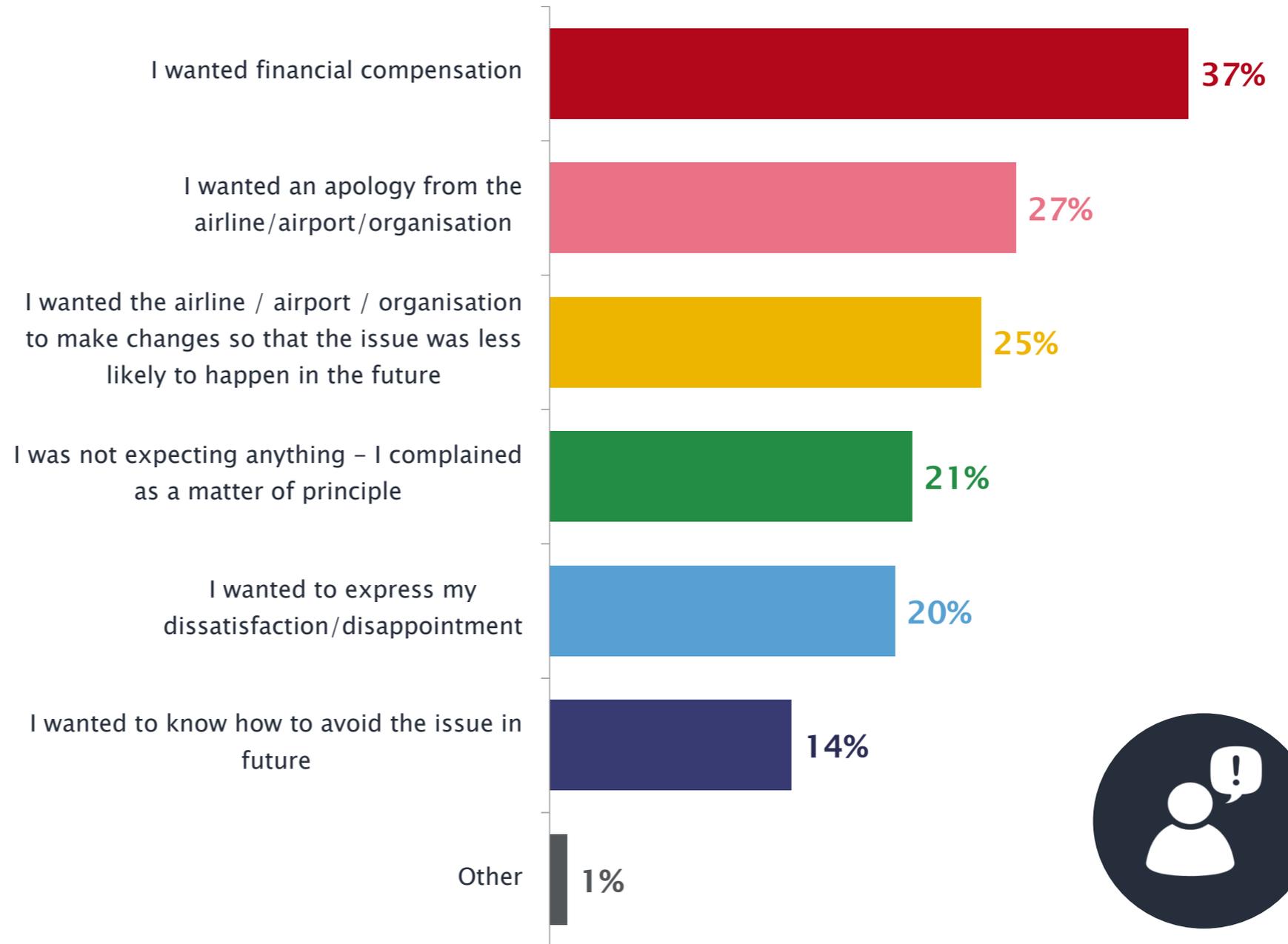
Recent flyers had a number of expectations from making a formal complaint about the travel issue they experienced, most notably financial compensation

Close to two in five (37 per cent) of those who formally complained about a travel problem did so because they wanted financial compensation.

However, a significant proportion expected an apology from the airline/airport/organisation (27 per cent) and/or changes so that the issue was less likely to happen in the future (25 per cent). Indeed, one in five passengers did not expect anything, saying that they complained as a matter of principle and/or to express their dissatisfaction/disappointment (21 per cent and 20 per cent respectively).

Expectations from making a formal complaint

Showing those who experienced travel issues and made a formal complaint excluding 'I did not make a formal complaint' responses



Recent flyers who did not complain about a travel issue are most likely to say that this was because they did not expect anything to change or did not expect to gain anything as a result of the complaint

When asked about the reasons for not making a formal complaint one in seven respondents say they didn't do so as they didn't expect anything to change as a result of their complaint (14 per cent) or they didn't expect to gain anything from complaining (13 per cent).

Other barriers commonly cited were that they expected the process to be too time-consuming (7 per cent) or too complicated (6 per cent). Only 4 per cent say they did not know how to complain.

These findings suggest the need for more effective communication with the purpose of increasing passengers' trust in the complaints process.

Reasons for not making a formal complaint

All those who have experienced a travel issue but did not formally complain excluding 'I did make a formal complaint' responses



Why didn't you make a formal complaint?





A quarter of recent flyers who experienced a travel issue during their last flight have heard of Alternative Dispute Resolution (ADR)

A quarter of recent flyers who have experienced a travel issue(s) say that they have heard of ADR, while seven in ten say they have not (24 per cent vs. 70 per cent respectively).

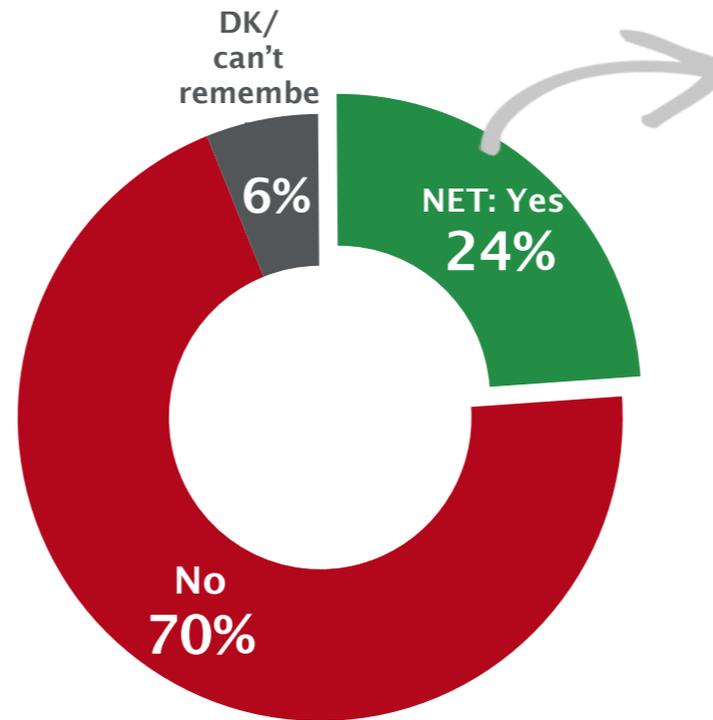
There is some divergence in where passengers first became aware of ADR, with a similar proportion saying that they found out about it online via their airline's website (29 per cent), told about it by their airline (28 per cent), or through an internet search (24 per cent).

% who have heard of ADR

All those who have experienced a travel issue(s)

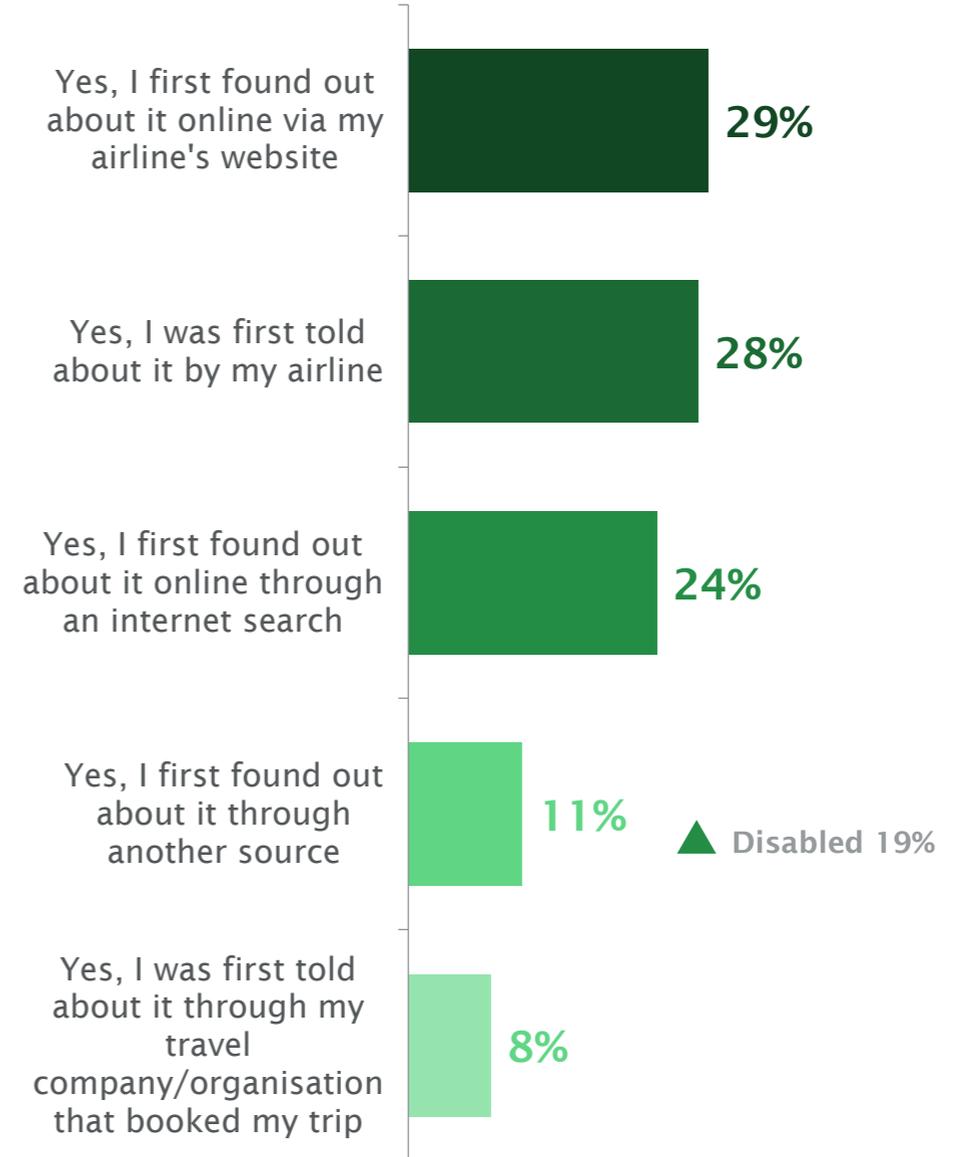
NET: Yes

- ▲ Age 18-34 34%
- ▲ Employed full-time 31%
- ▲ London 37%
- ▲ Disabled passenger 44%



Source of first information on ADR

All those who have experienced a travel issue(s) and have heard of ADR



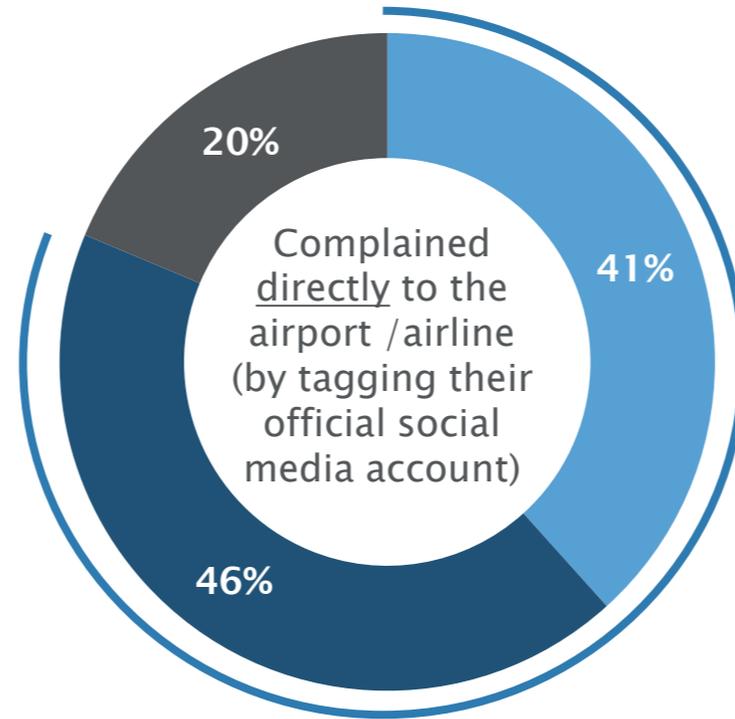
Q45. Have you heard of a term/process called Alternative Dispute Resolution (ADR)? Base: All who have flown in the last 12 months and experienced travel issue(s) (n=939) Base: All who have flown in last 12 months and experienced a travel issue(s), excluding 'No, I have not' and 'Don't know / can't remember' responses (n=225)



Complaints on social media tend to have been made after experiencing the flight issue

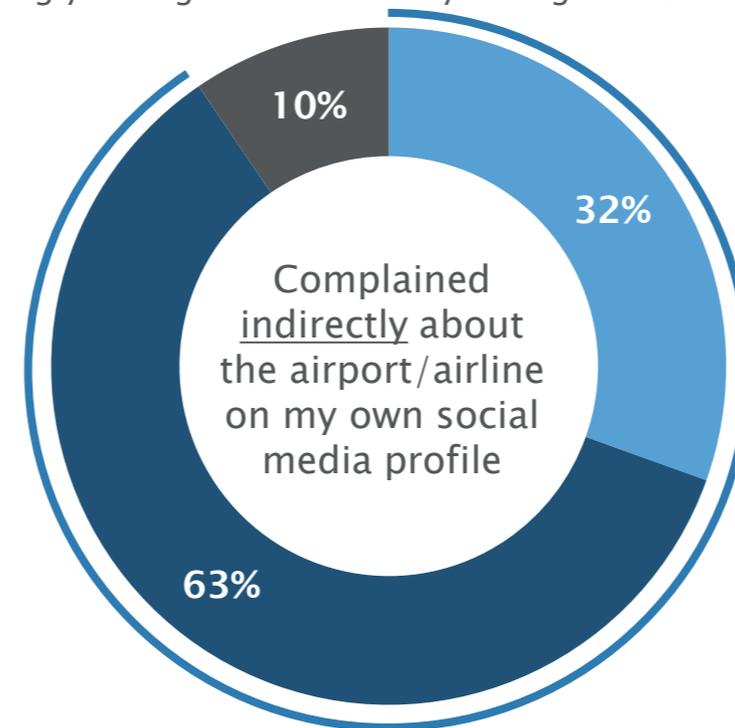
Those who made complaints on social media about a travel issue are likely to have complained both directly (80 per cent) and indirectly (90 per cent).

Those making either type of complaint via social media tend to have done so after experiencing the flight issue. For example, three in five (63 per cent) of those who complained indirectly via social media did so afterwards, compared to a third who did so during the flight issue (32 per cent). Those who complained directly via social media also tend to have done so after the flight issue (46 per cent), although a similar proportion did so during the issue (41 per cent). This may be due to customers trying to seek information or assurances from the airline while the issue is ongoing, such as a flight delay.

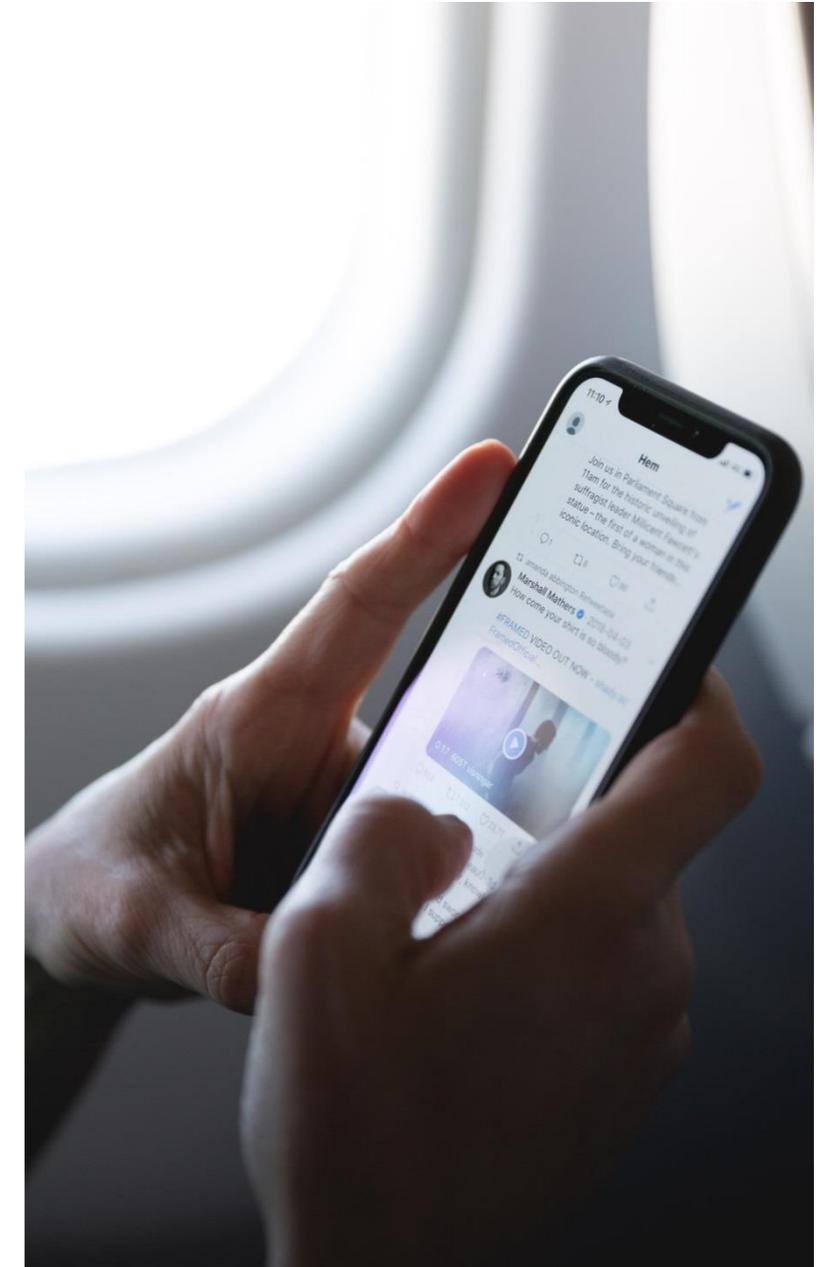


NET: Complained directly **80%**

■ During your flight issue ■ After your flight issue ■ Neither



NET: Complained indirectly **90%**



Recent flyers are more likely to be satisfied than dissatisfied with each aspect of how a flight issue was handled

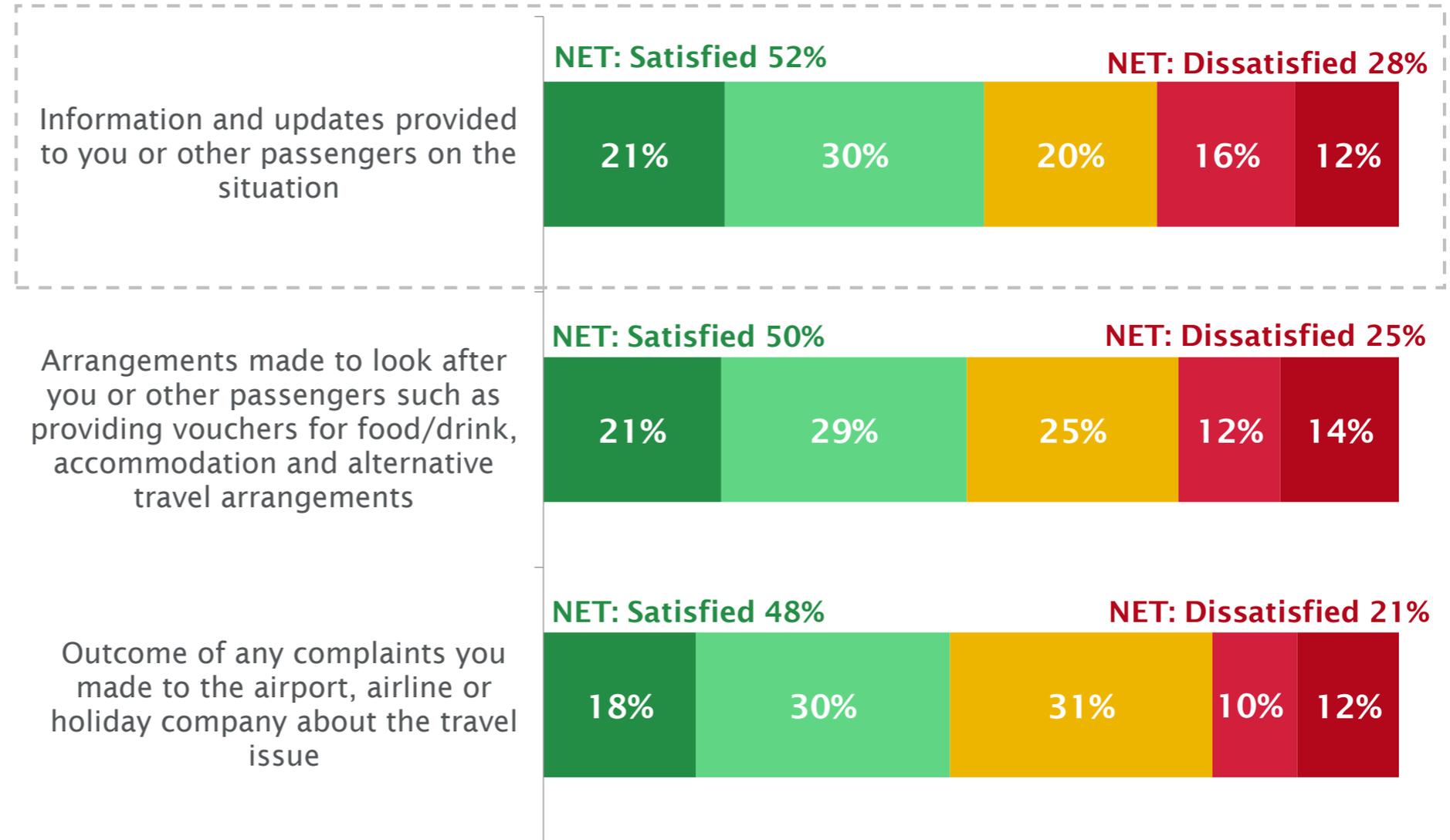
Around half of recent flyers who experienced a travel issue were satisfied with the information and updates provided (52 per cent), arrangements made to look after them or other passengers (50 per cent), or the outcome of any complaints they made (48 per cent). Nevertheless, a significant minority were dissatisfied with each of these aspects, most notably the information and updates provided (28 per cent).

Satisfaction with the different aspects of flight issue(s)

All who have flown in the last 12 months and experienced a travel problem



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



Q46. How satisfied or dissatisfied were you with each of the following aspects in terms of your flight issue(s)? Please select one answer for each statement. Base: All who have flown in last 12 months and experienced a travel problem, excluding 'Don't know' and 'Not applicable/Not required' responses (n=490-875)

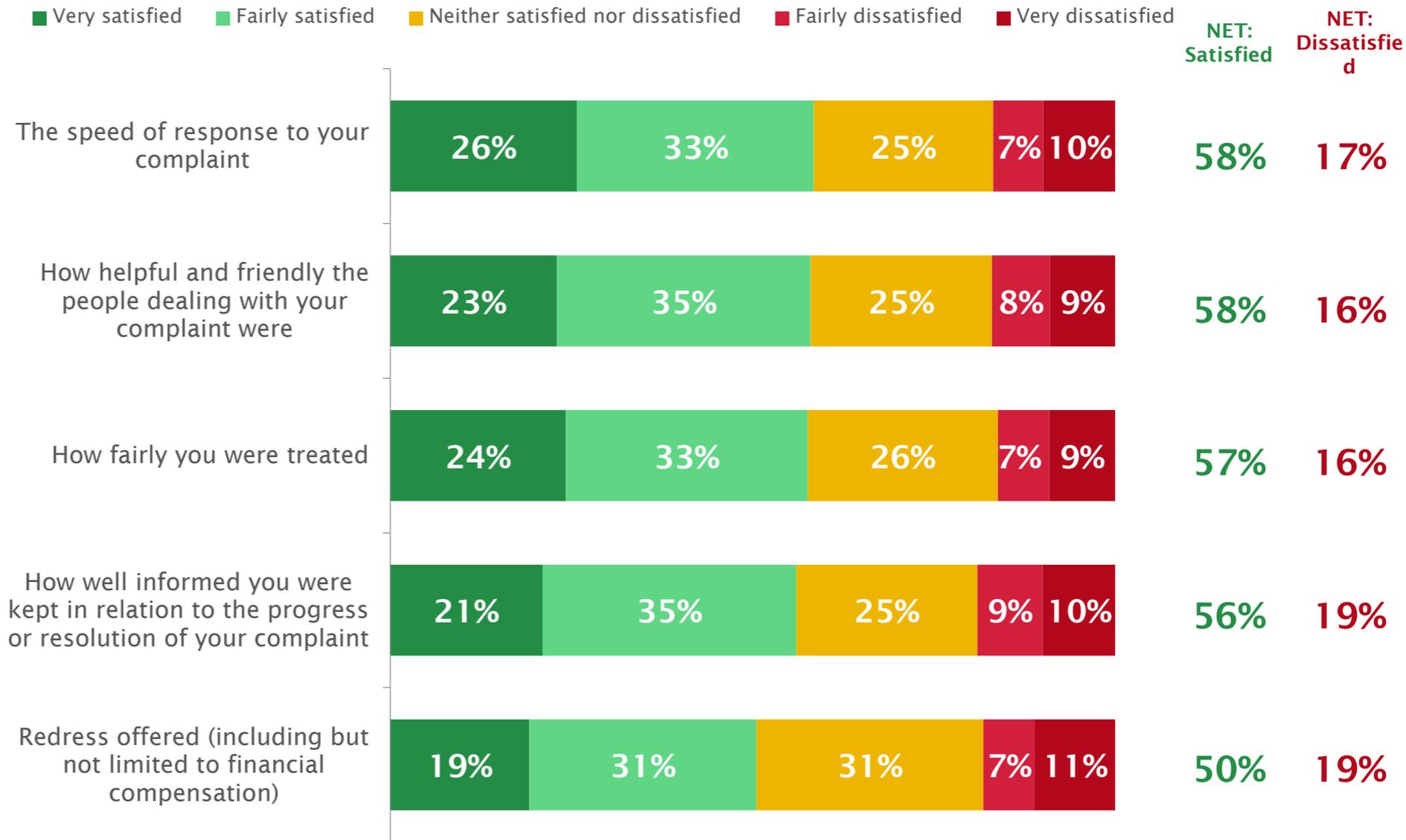
Recent flyers are more likely to be satisfied than dissatisfied with each aspect of how their travel complaint was handled

Around half of recent flyers were satisfied with how their travel complaint was handled – a slightly higher proportion on each issue tested compared to previous findings (50 per cent–58 per cent vs. 47 per cent–53 per cent Spring 2018). The most significant improvement was seen with regards to how fairly passengers feel they were treated (57 per cent vs. 48 per cent Spring 2018).

Similar to previous findings, passengers are most likely to be satisfied with the speed of response to their complaint and/or the helpfulness and friendliness of the people dealing with their complaint (58 per cent for each). However, around a fifth remains dissatisfied with each aspect, and around a quarter remains neutral, implying the necessity of further improvements in each area.

Satisfaction with how complaints were handled

All who have flown in the last 12 months, experienced a travel issue and complained, excluding 'Too early to say' and 'Don't know' responses



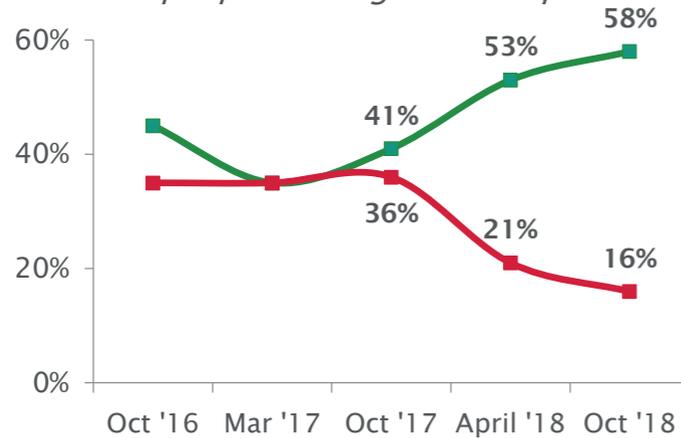
Q48. Thinking more specifically about any complaints you made to the airport, airline or holiday company about the travel issue, how satisfied or dissatisfied were you with each of the following aspects? Base: All who have flown in the last 12 months and made a complaint about a travel issue(s) excluding 'Too early to say' and 'Don't know' responses (n=449-466)

Satisfaction rates on each area of complaint handling continue to steadily increase

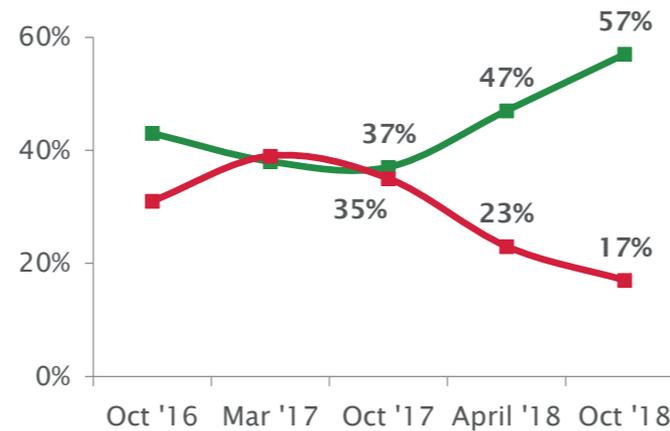


Satisfaction with complaint handling – Tracking

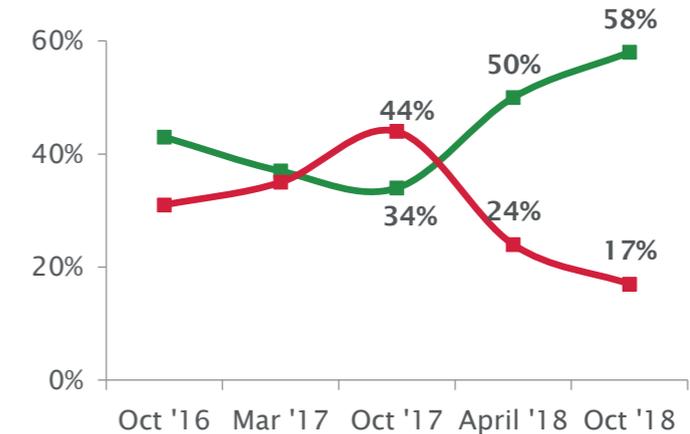
Helpfulness and friendliness of people dealing with complaint



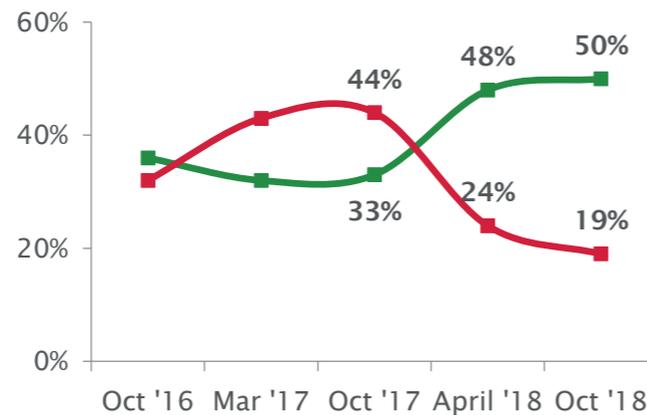
How fairly you were treated



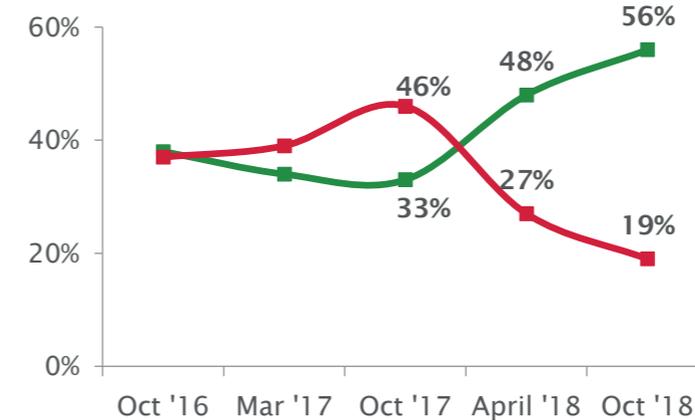
The speed of response to your complaint



Redress offered



Kept well informed about progress or resolution



NET: Satisfied 
 NET: Dissatisfied 

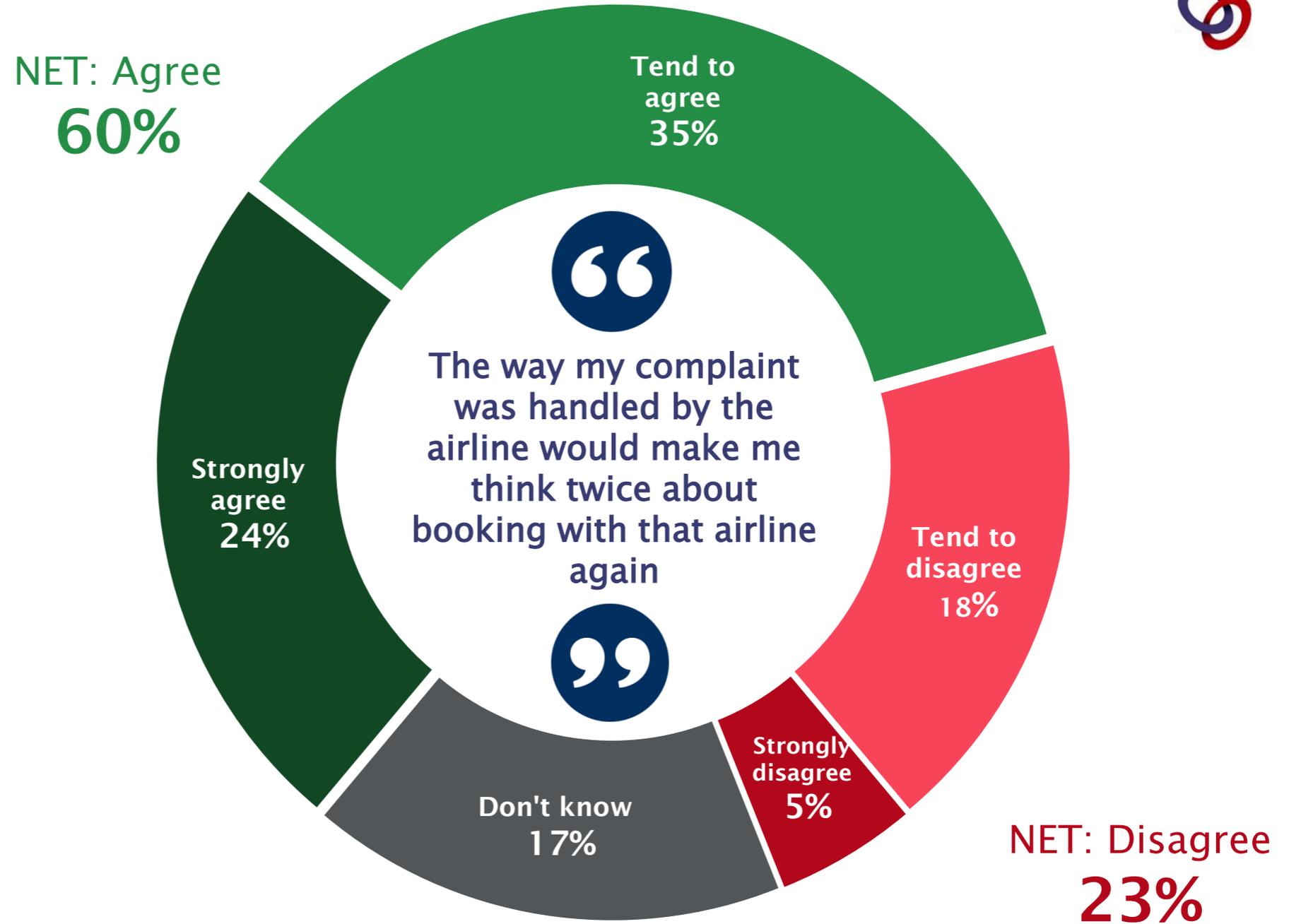


Results suggest that the mishandling of complaints could make passengers think twice about booking with the airline again

Three in five (60 per cent) recent flyers who have experienced any travel issues and were neutral/dissatisfied with how the issue was handled agree that the way their complaint was handled by the airline would make them think twice about booking with that airline again. Within this, a quarter of passengers say they strongly agree with this statement (24 per cent), showing that sentiment is relatively strong.

Concurrently, only a quarter disagree with this overall (23 per cent).

This indicates the importance of ensuring the effective operation of complaint handling systems by airlines in order to maintain customers' trust.





Section 6

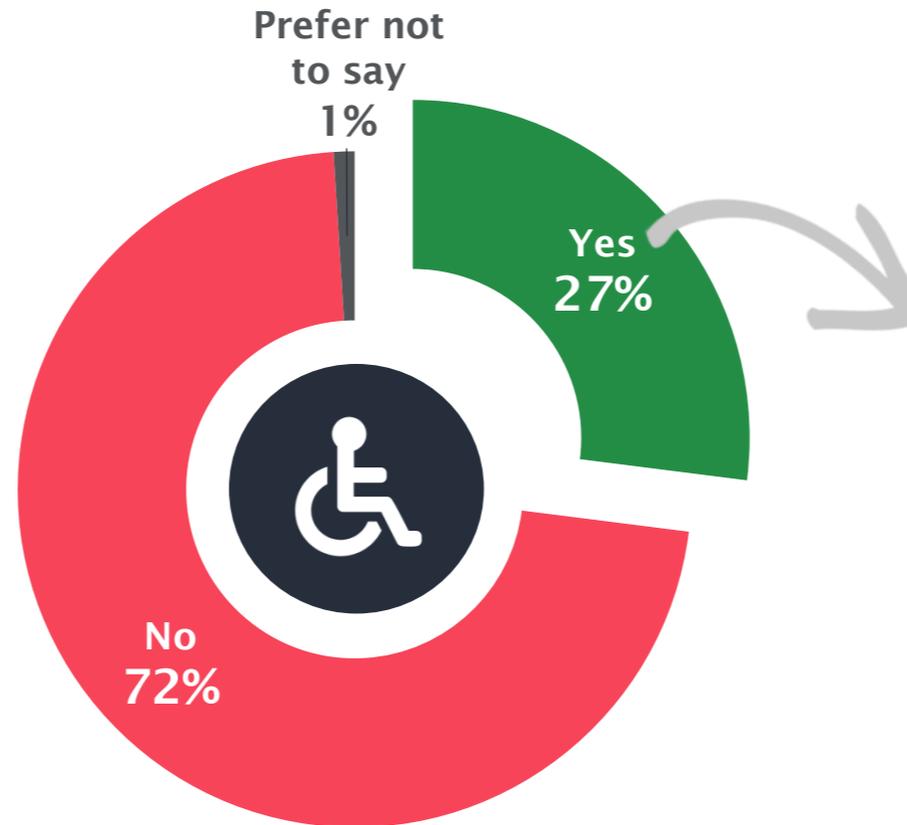
Accessibility and the experience of disabled passengers



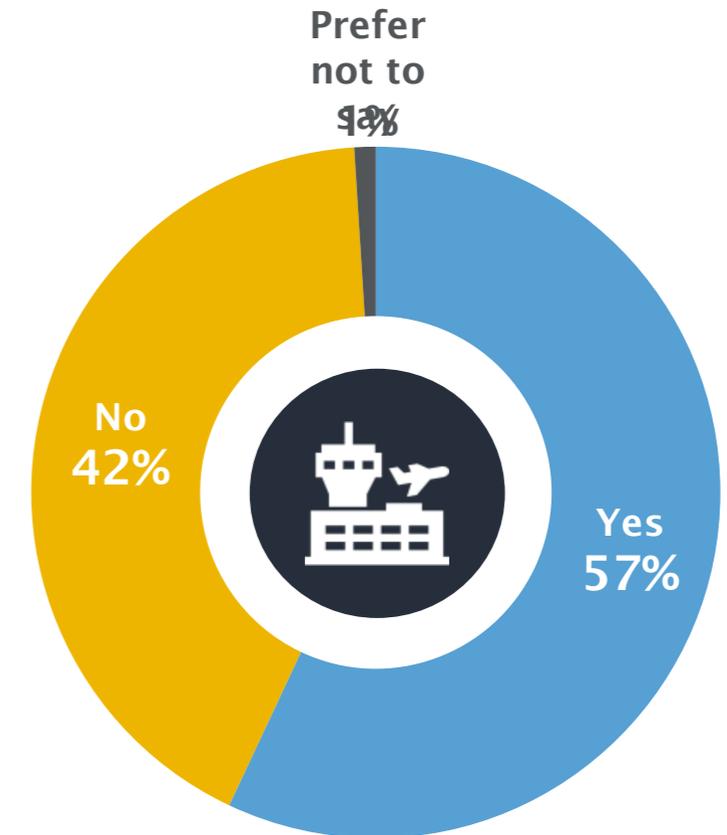
Close to three in five of those with a disability/health condition find using airports or flying difficult

Of those who describe themselves as having a disability/health condition that limits their day-to-day activities (27 per cent of all respondents), 57 per cent say that they find accessing/using airports or flying difficult. This is in line with findings from the previous wave of research (also 57 per cent in April 2018).

Disability/health condition *% who have a disability*



Difficulty in accessing/using airports or flying *All who have a disability*



Q7. Do you have any disability or health condition that limits your day-to-day activities? It could include a physical disability or health condition (e.g. affecting your movement, balance, vision or hearing) or a non-physical disability or health condition (e.g. affecting thinking, remembering, learning, communications, mental health or social relationships). Base: All respondents (n=3538)

Q8. Does your disability or health condition make accessing and/or using airports or flying difficult?/ Would your disability or health condition make accessing and/or using airports or flying difficult? Base: All who have a disability (n=945)



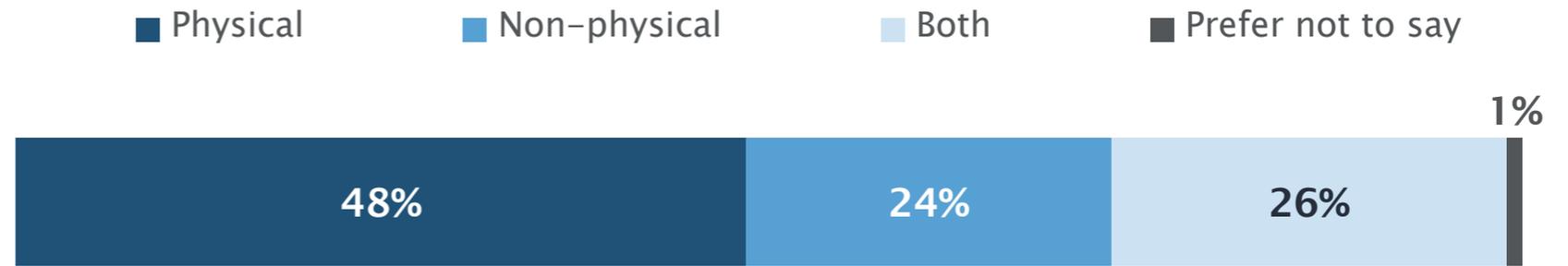
Around half of those living with a disability or health condition say that their disability/condition is physical and hidden

Half of those living with a disability say that their condition is physical (48 per cent), while around a quarter say that their condition is either non-physical (24 per cent), or both physical and non-physical (26 per cent).

Furthermore, the majority of disabled respondents say that their condition is hidden (56 per cent), while similar proportion of around one in five say that their condition is either non-hidden (19 per cent) or both hidden and non-hidden (23 per cent).

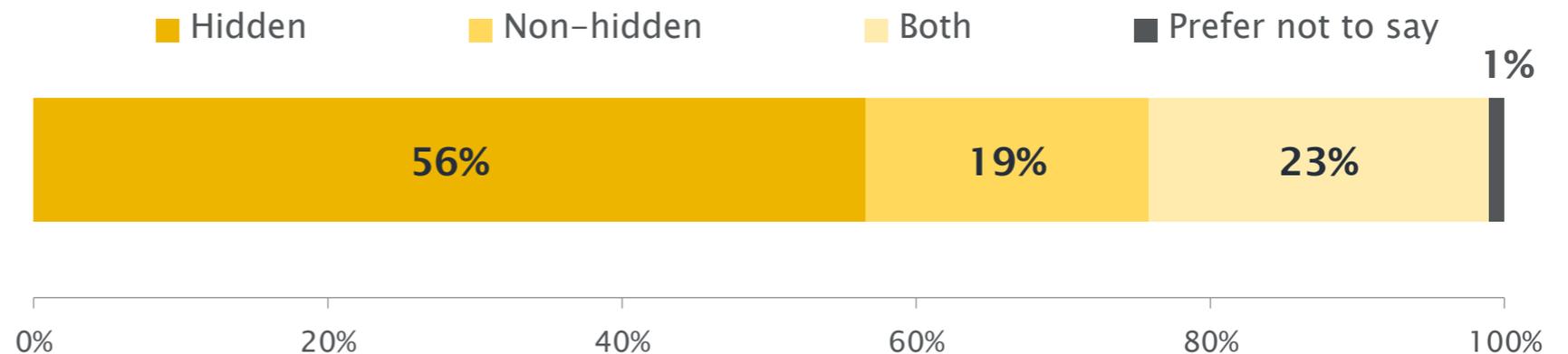
Physical or non-physical disability

All who have a disability (online only)



Hidden or non-hidden disability

All who have a disability (online only)



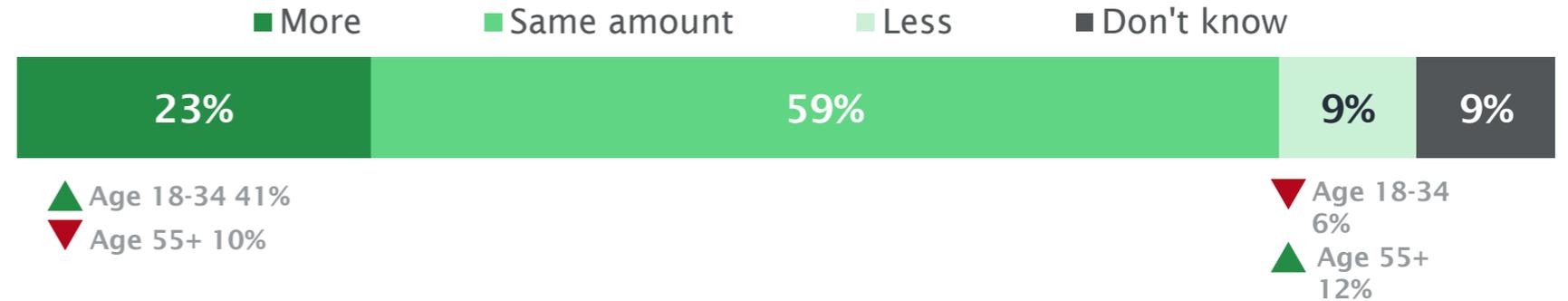
Q9. Would you classify your disability or health condition as physical, non-physical or both? By physical we mean something that affects your movement, balance, vision or hearing etc. By non-physical, we mean something that affects your thinking, remembering, learning, communication, mental health or social relationships. Base: All who have a disability, - online only (n=860)

Q10. The UK Aviation Regulator works to ensure that people with all kinds of disabilities receive the support they are entitled to, including those with disabilities which could be described as 'hidden' as they are not outwardly visible. Would you consider your disability to be a hidden or a non-hidden disability? Base: All who have a disability - online only (n=860)



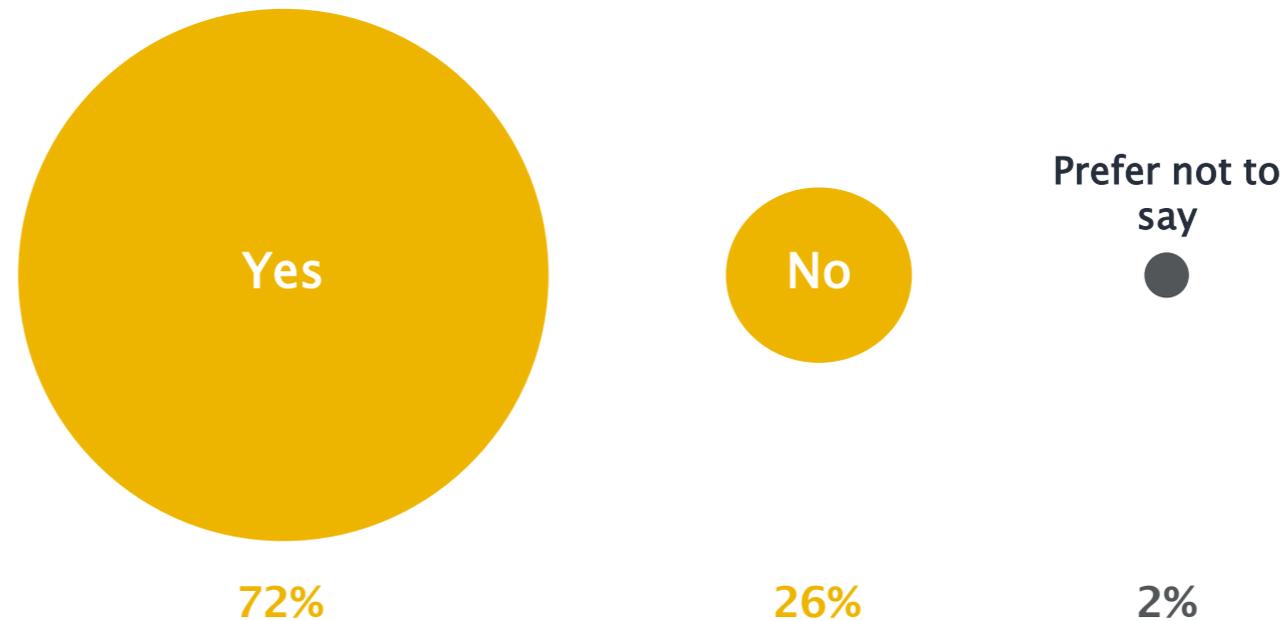
Expected flying behaviour (frequency) in next 12 months, as compared to previous year

All who have a disability



Assistance required

All who have a disability and find accessing/using airports and/or flying difficult



The majority of disabled people expect to fly about the same amount in the next 12 months

Three in five disabled people expect to fly about the same amount in the coming year (59 per cent), while a significant minority of around a quarter say that they expect to fly more (23 per cent). Younger disabled passengers are significantly more likely to expect to fly more in the coming year than their older counterparts (41 per cent 18–34 yr. vs. 10 per cent 55+). Correspondingly, disabled people over 55 are twice as likely than those 18–34 to say that they expect to travel less in this time period (6 per cent vs. 12 per cent respectively).

Seven in ten of those disabled passengers who find accessing/using airports and/or flying difficult say that their disability or health condition means that they would need specific assistance from the airport or airline – a significantly higher proportion than those who say they would not (72 per cent vs. 26 per cent respectively).

Q11. In the next 12 months, do you expect that you will fly more, the same amount or less compared to the number of times you have flown over the last 12 months? Please select one answer only Base: all who have a disability (n=945)
 Q12. Does your disability or health condition mean that you would need or think you would need specific assistance from the airport or airline when making a flight? Base: all those who have a disability and find accessing/using airports difficult and/or find flying difficult (n=536)



Four in five of those whose disability makes flying difficult are aware of the availability of special assistance to some extent

Four in five of those disabled passengers who find accessing/using airports and/or flying difficult have some level of awareness of special assistance when travelling by air (78 per cent).

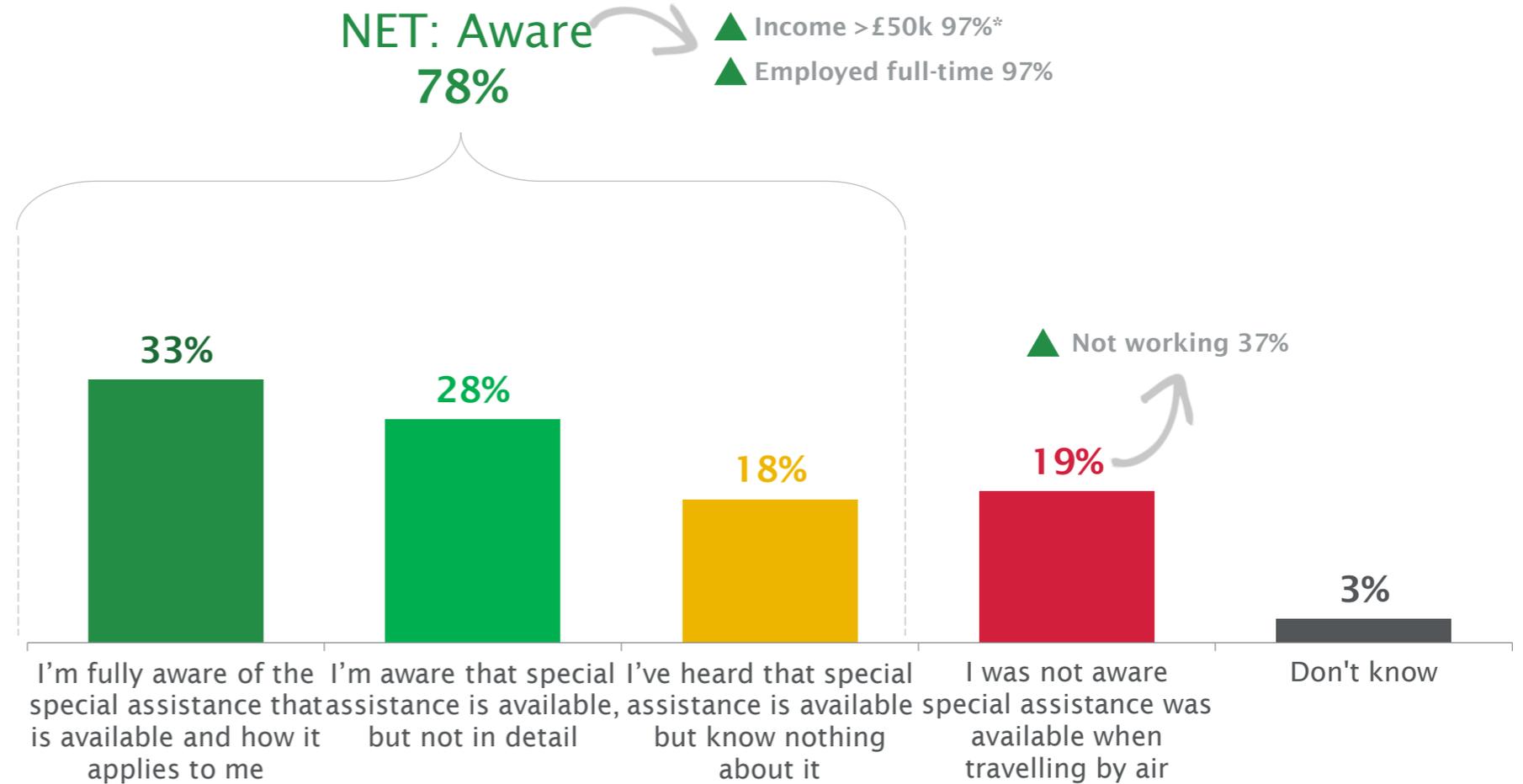
However, only a third say that they are fully aware of the special assistance that is available and how it applies to them (33 per cent), while over a quarter say that they are aware of it but not in detail (28 per cent), and one in five say they have heard of it but know nothing about it (18 per cent).

Furthermore, it is crucial to note that a relatively high proportion, 19 per cent, say that they were not aware special assistance was available when travelling by air.

Thus, despite the overall high level of awareness there is clear opportunity to increase disabled passengers' knowledge of the kinds of special assistance available.

Awareness of special assistance when travelling by air

All those who have a disability and find accessing/using airports difficult and/or find flying difficult



Q13. Before today, to what extent were you aware or not aware that people with disabilities or health conditions that limit day to day activities are entitled to special assistance when travelling by air? Base: All those who have a disability and find accessing/using airports difficult and/or find flying difficult (n=536)

The majority of disabled passengers who find flying difficult would inform airlines and/or the airport in order to ensure they receive special assistance

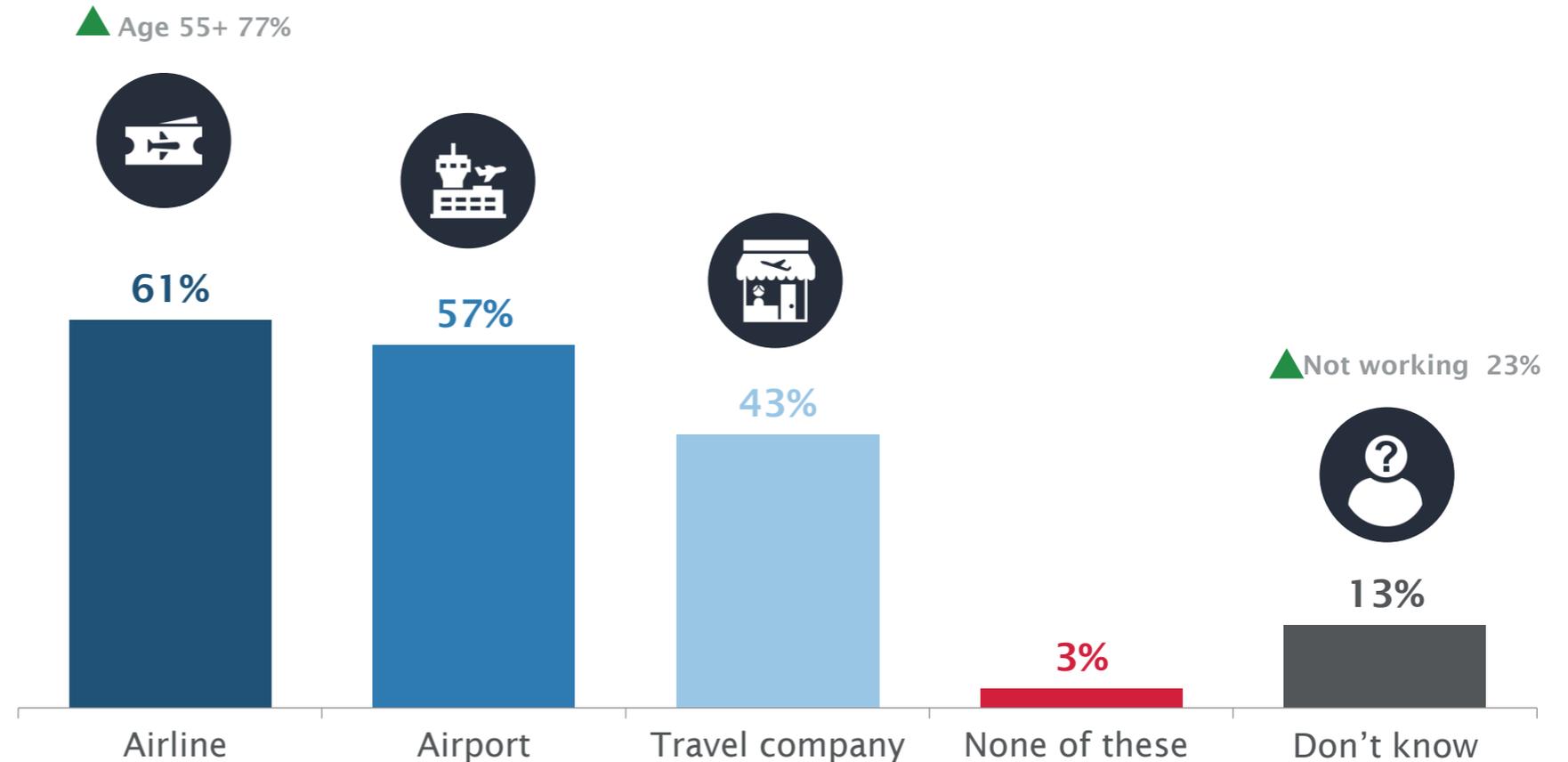
Of those disabled passengers who have difficulties travelling by air, the majority believe that they would need to inform the airline (61 per cent) or the airport (57 per cent) in order to ensure that the special assistance they require is received.

More than one in ten (13 per cent) say they don't know who they would need to inform to get the assistance they require in order to ensure their special needs are met.

Perceptions of who to inform to receive special assistance when travelling by air



All those who have a disability and find accessing/using airports difficult and/or find flying difficult



EU legislation states that a person who requires assistance should only have to provide information to whoever the reservation is made with – airline, travel agent or tour operator. By law this information must be passed to the relevant airports and operating airlines. It is not necessary for them to inform the airport but there is nothing to prevent a passenger contacting an airport as well to verify that assistance will be available as requested if they should so wish.

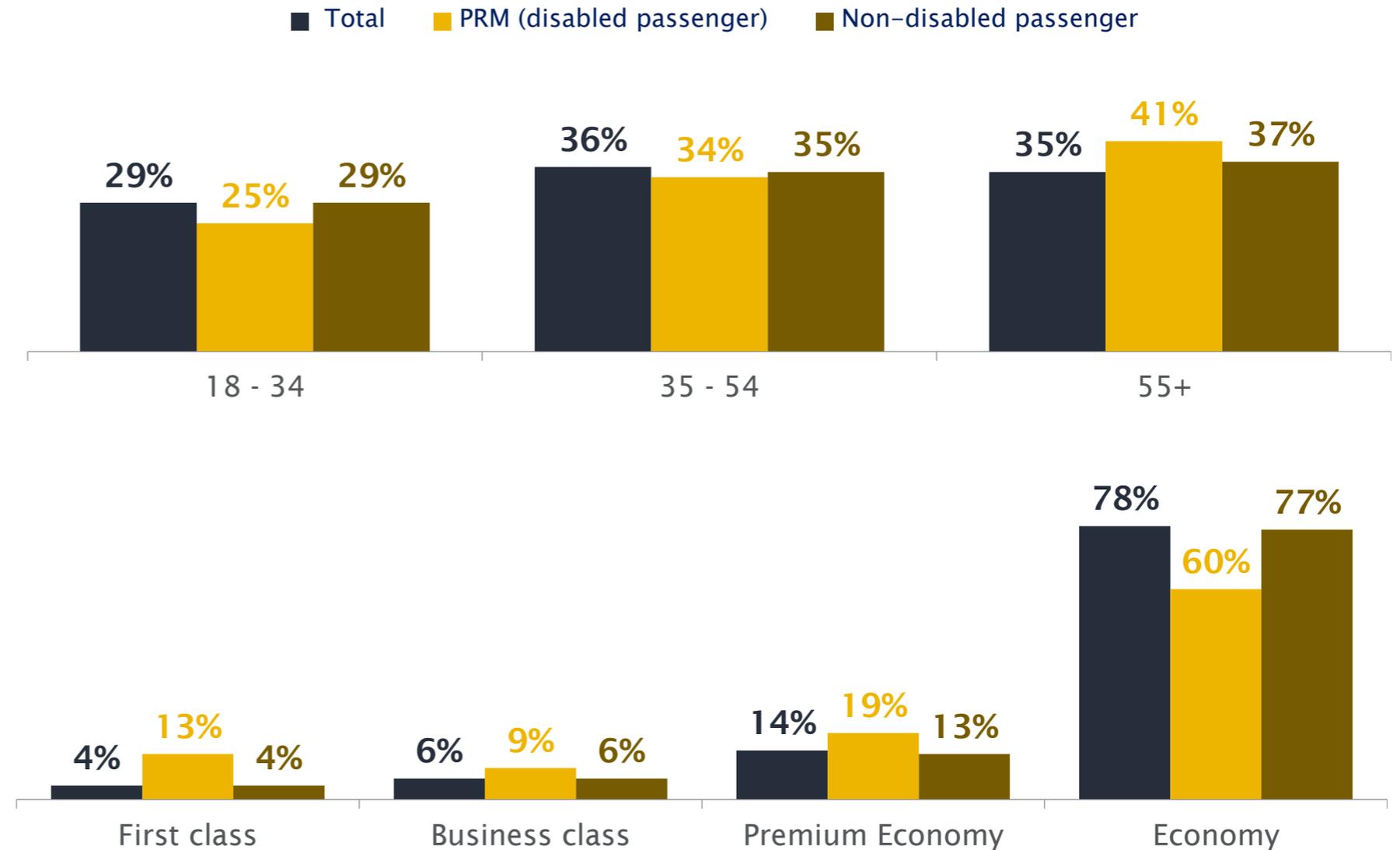


Disabled passengers are more likely than average to travel first, business and premium economy class

Disabled passengers are about three times more likely to travel first class than non-disabled passengers (13 per cent vs. 4 per cent). They are also more likely to opt for travelling business class as well as premium economy class (9 per cent vs. 6 per cent and 19 per cent vs. 13 per cent respectively).

However, disabled passengers – just like non-disabled passengers – are most likely to travel economy class, although the proportion of disabled passengers travelling this way is significantly lower (60 per cent disabled vs. 77 per cent non-disabled).

Disabled passengers compared to non-disabled passengers: across ages and cabin class flown



QD2. Age Base: All respondents (n=3538) Respondents with a disability (n=945)

Q21. Which cabin class did you travel in the last time you flew? (If you travelled in different classes for your outbound and return flight, please select all that apply) Base: All who have flown from a UK airport in the last 12 months (n=1920) All who have flown in the last 12 months and have a disability (n=351) All who have flown in the last 12 months and don't have a disability (n=1558)



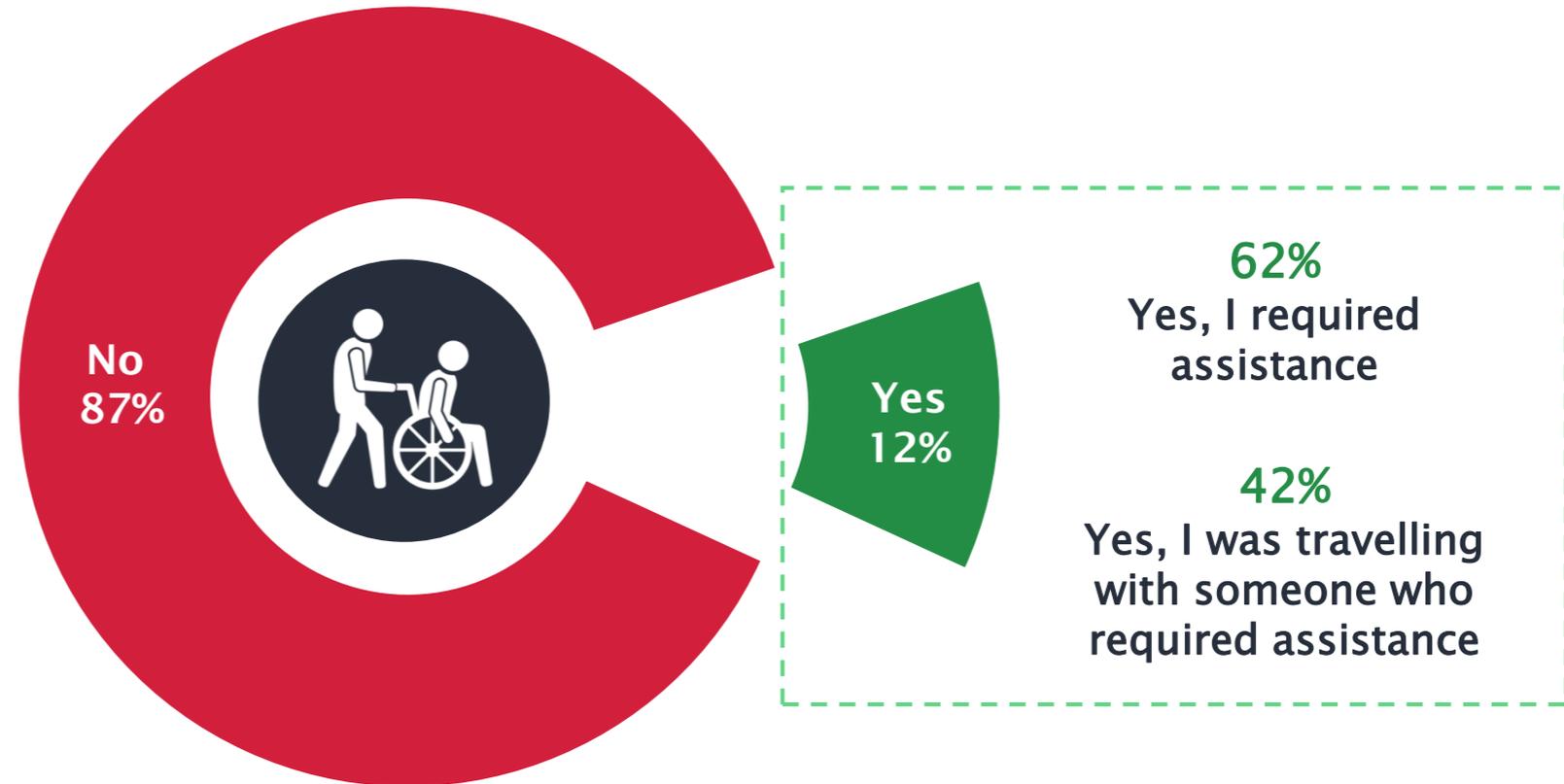
The vast majority of recent flyers did not require special assistance on their last flight neither for themselves nor for someone else

In line with previous findings, the majority of recent flyers did not require any special assistance on their most recent trip (87 per cent vs. 89 per cent Spring 2018), while around one in ten say otherwise (12 per cent vs. 10 per cent Spring 2018).

Of those who say they did require special assistance, 62 per cent say they required it for themselves, while 42 per cent required it for someone in their party.

Assistance required

% of recent flyers or someone in their party who required assistance



*Q23. Did you or anyone in your party have a disability or health condition that meant you required some assistance from the airport or airline on this occasion? Please continue to think about both the outward and return flight. Base: All who have flown in the last 12 months (n=1920)
Base: All who have flown in the last 12 months, excluding 'No' and 'Don't know/prefer not to say' responses (n=237)*



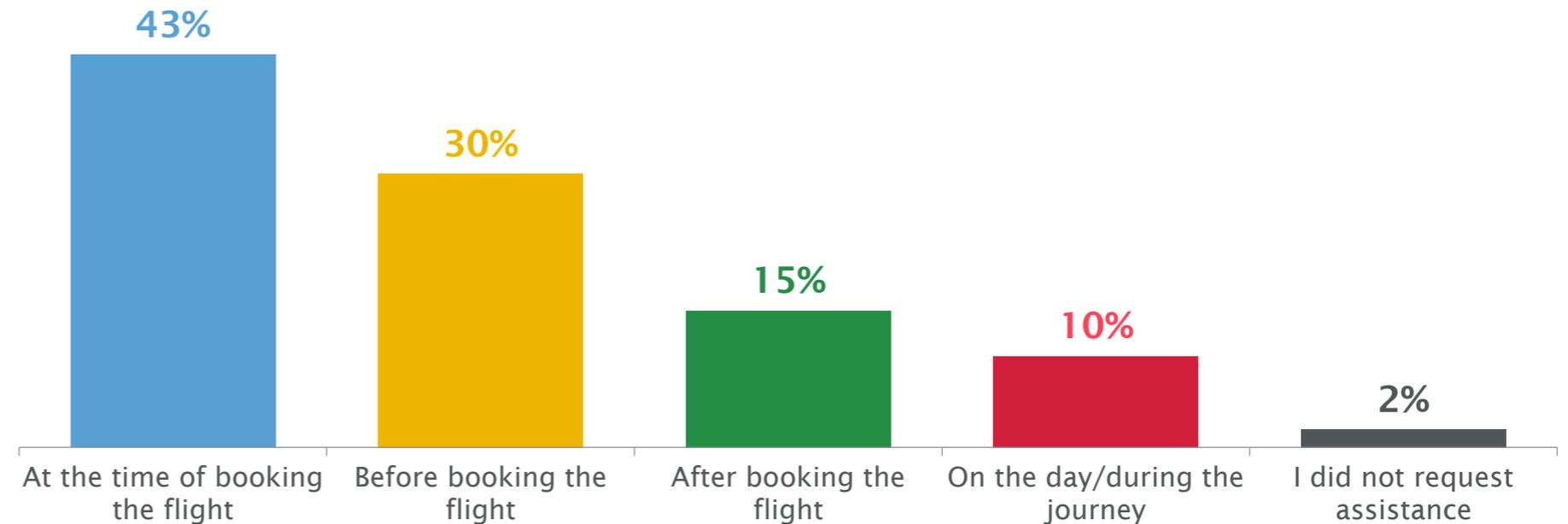
Assistance is most likely to be requested at the time of booking the flight

The majority of recent flyers who required assistance either for themselves or for someone else requested it before the journey itself.

Respondents are most likely to say that they requested assistance at the time of booking their flight (43 per cent), followed by those who did so before booking the flight (30 per cent).

Point during booking process when assistance was requested

All who have flown in the last 12 months and required assistance





The majority of those who requested assistance on their last trip did so for the first time on that occasion or within the past three years

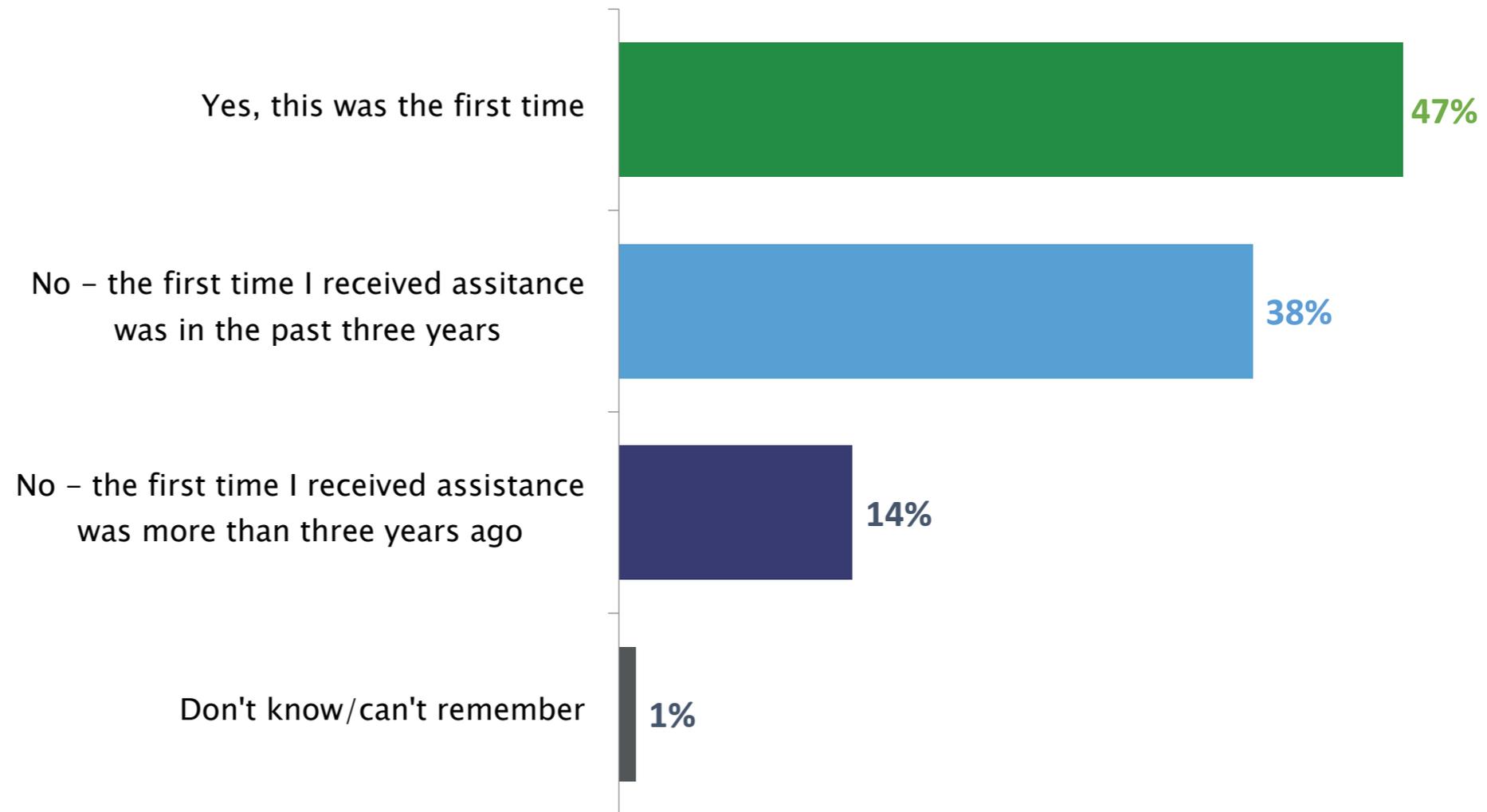
Around half of those who requested assistance on their last trip did so for the first time (47 per cent).

Of those who requested assistance before, two in five say the first time they received assistance was in the past three years, compared to just one in seven who say they did so more than three years ago (38 per cent vs. 14 per cent respectively).

This suggests that asking for assistance is still a relatively new process for a significant proportion of passengers, thus clear communication on these services is crucial from airlines/airports.

Was this the first time you had ever requested assistance when flying from a UK airport?

All those who have flown in the last 12 months, required assistance and requested it



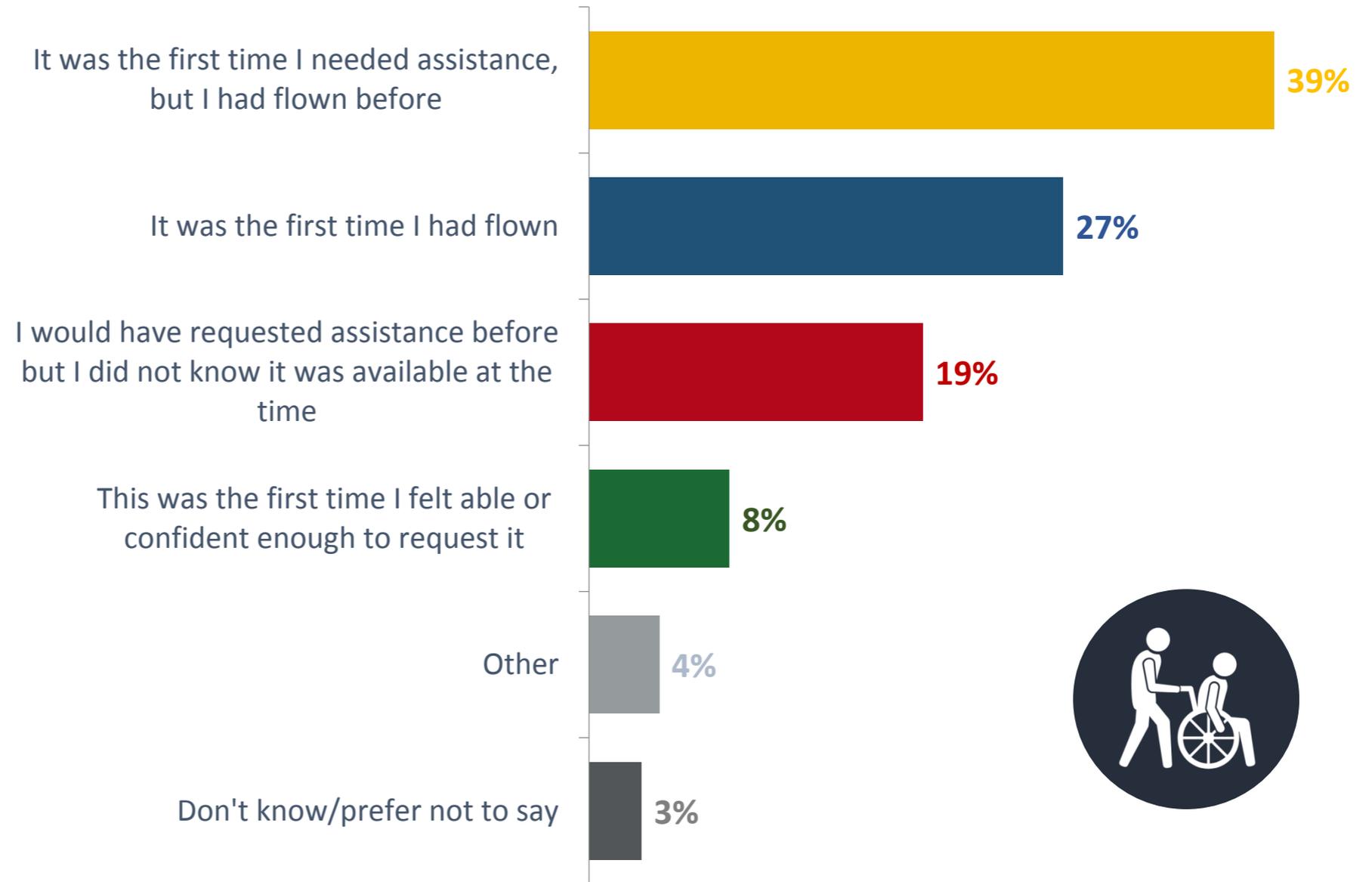
Those who requested assistance for the first time within the past three years are most likely to have done so because it was the first time they needed it

Those who required assistance for the first time within the past three years are most likely to say they did so because it was the first time they needed assistance but they had flown before (39 per cent). This is followed by those who say they required assistance for the first time because it was their first time they had flown (27 per cent).

A lower, but significant, proportion of one in five respondents say that they would have requested assistance before but did not know it was available at the time (19 per cent), while around one in ten say that this was the first time they felt able or confident enough to request it (8 per cent). This indicates the existence of some barriers to requesting assistance.

Reasons for use of assistance for the first time

All who have flown in the last 12 months and previously received assistance for the first time in the last 3 years



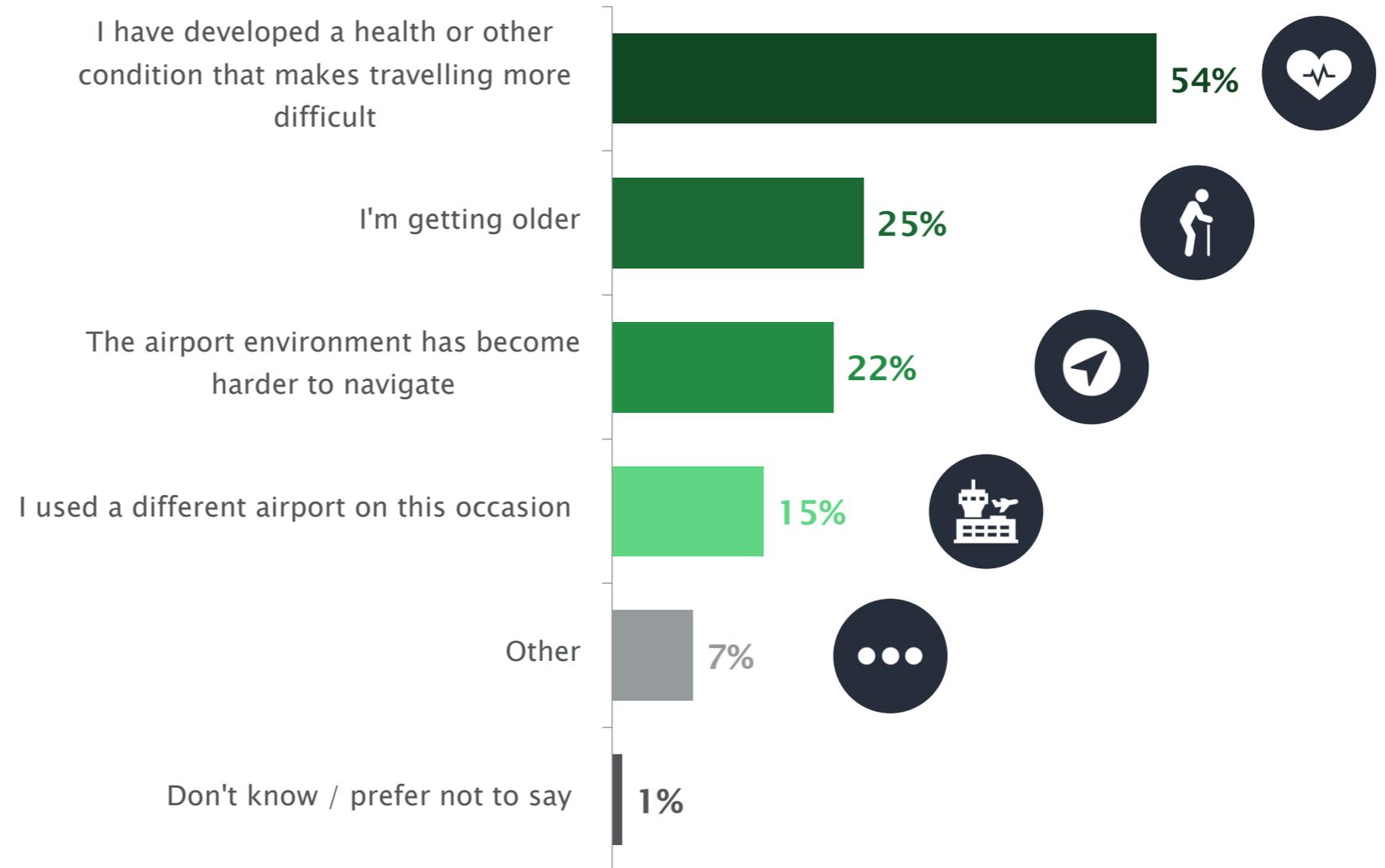
The majority of those who recently received assistance for the first time asked for it due to developing a health or other condition that makes travelling more difficult

The majority of recent flyers who say they asked for assistance for the first time in the last three years did so due to developing a health or other condition that makes travelling more difficult (54 per cent), while a quarter say they did so as they are getting older (25 per cent).

In comparison, the proportion of those who say they asked for assistance for the first time due to reasons related to the airport is significantly lower, with one in five saying they required assistance because the airport environment has become harder to navigate (22 per cent), and one in seven saying it was a result of using a different airport on this occasion (15 per cent).

Understanding why assistance was needed the first time it was requested

All those who have previously received assistance for the first time in the last 3 years and this was the first time assistance was needed



Q36. Which of the following best describes why you needed assistance when you flew on this occasion, but had not previously needed it? Base: All those who have flown in the last 12 months and previously needed assistance for the first time in the last three years, and this was the first time assistance was needed (n=78)*

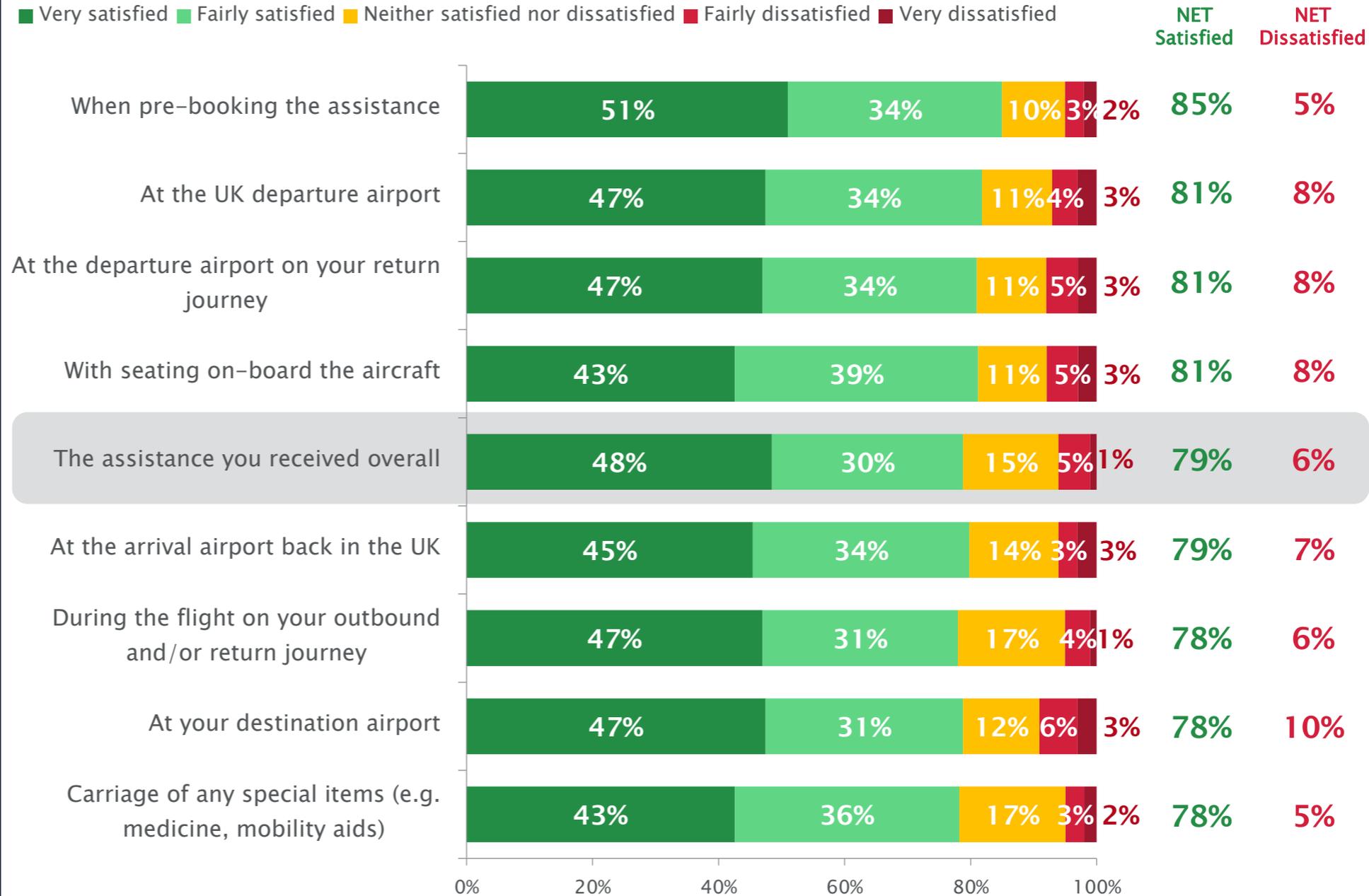
The clear majority of those who received assistance for their last journey were satisfied with each aspect of this service

In line with previous findings, recent flyers are far more likely to be satisfied than dissatisfied with each aspect of assistance tested at any point of their journey – with the level of satisfaction broadly increasing compared to the previous wave of research. For example, the proportion of those satisfied with the assistance they received overall rose by 6 percentage points since the last wave of research (79 per cent vs. 73 per cent Spring 2018).

Concurrently, dissatisfaction is low, although one in ten (10 per cent) say they were dissatisfied with the assistance received at the destination airport.

Satisfaction with the services received at each point of the journey

All who have flown in the last 12 months and received assistance for their last journey, excluding 'Don't know' and 'Not applicable' responses



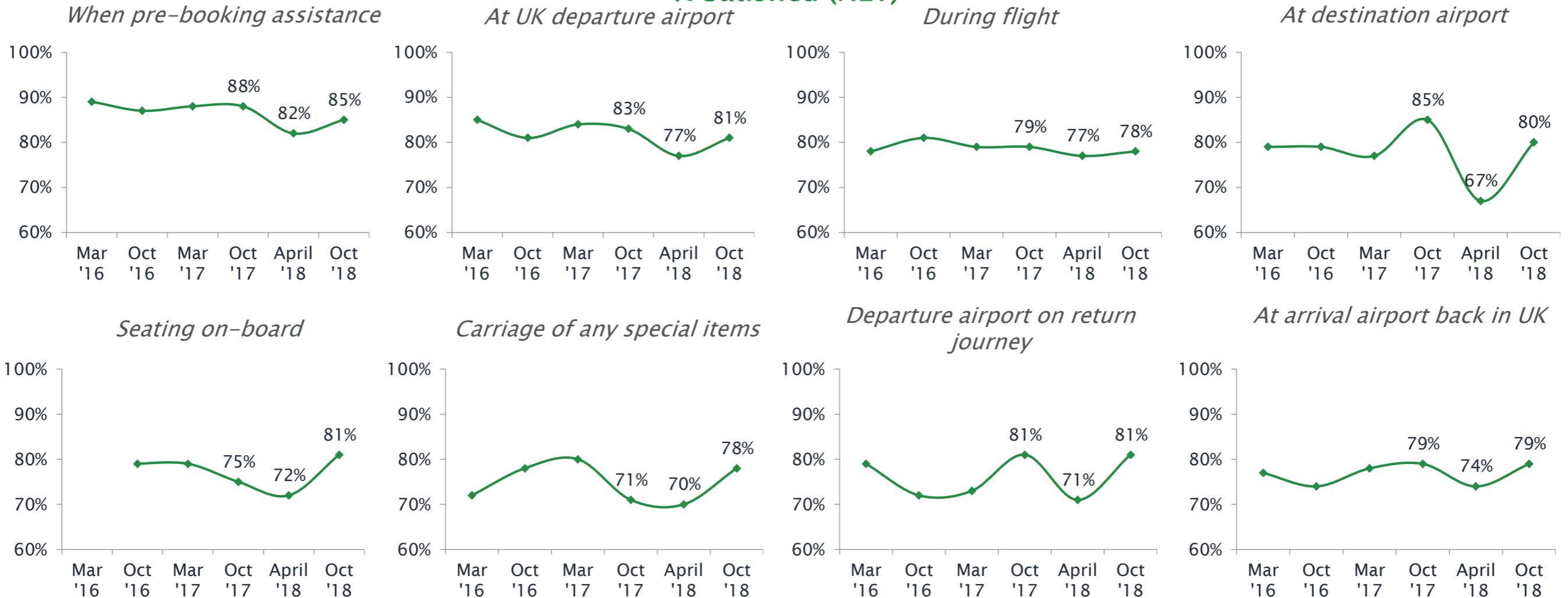
Q37. How satisfied or dissatisfied were you with the service you received at each of these points in the journey? Base: All who have flown in the last 12 months and requested assistance (excluding DK and NA responses) (n=188-230)

Satisfaction rates are on the rise with the services received at each point in the journey, though there remains room for improvement particularly during the flight and regarding the carriage of special items



Satisfaction with the services received at each point in the journey – Tracking

% Satisfied (NET)



Q37. How satisfied or dissatisfied were you with the service you received at each of these points in the journey? Base: All who have flown in the last 12 months and requested assistance (excluding DK and NA responses) (n=188-230)



Poor customer care, staff shortages or the attitude of staff are among the most common reasons for why disabled passengers were dissatisfied with the assistance they received

Reasons for being dissatisfied with the assistance received

All disabled passengers who were dissatisfied with the assistance they received overall

"[I got] left until last to board and un-board the plane as they had forgotten about me."

Poor customer care



Rude/arrogant staff



"I have not received any feedback on an incident I faced on-board that aggravated some of my symptoms."

"Insufficient staff to take all the disabled people from the plane. We were left waiting for further staff to arrive to take us further. After about 15 minutes we gave up and walked. We had a taxi waiting. Not what you want after a long flight."



Not enough staff

"I had a wheelchair so the cabin crew said I was holding up the queue, [the] staff were very rude."

Q38 percentages are not shown because of a low base size.

Q38. Why were you dissatisfied with the assistance you received overall? Base: All those who were dissatisfied with overall assistance (n=14*)

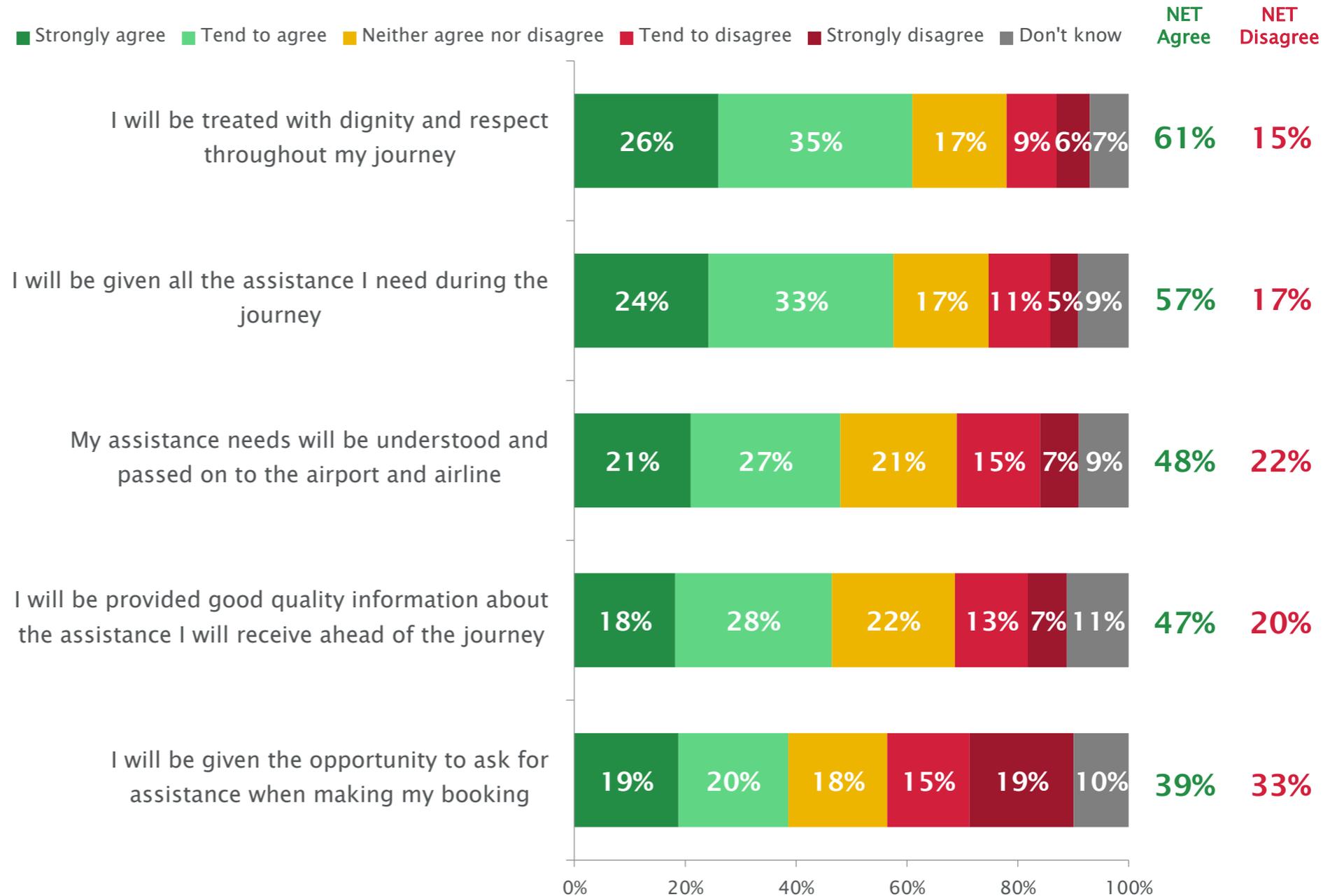
Those with a disability are generally more likely to have a positive than negative outlook on how their needs will be dealt with during their next flight, but there is much room for improvement

When making considerations about how their disability or health condition needs will be dealt with if and when they next choose to fly, around three in five disabled passengers agree that they will be treated with dignity and respect throughout their journey (61 per cent), or that they will be given all the assistance they need during the journey (57 per cent).

In addition, only two in five agree that they will be given the opportunity to ask for assistance when making their booking, while a third disagrees with this (39 per cent vs. 33 per cent respectively). This may be due to the relatively high proportion of those who are unaware or know nothing about the special assistance available, as shown earlier in this report.

Expectations among PRMs for service when flying

All who have a disability and have flown in the last 4 years



Q50. To what extent 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: All those who have a disability and have flown in the last 4 years (n=527)



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