
Civil Aviation Authority

UK Aviation Consumer Survey
Wave 8 (Autumn 2019)



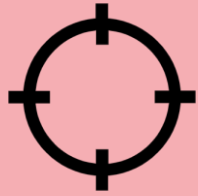
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Background and method

The Civil Aviation Authority (CAA) has re-commissioned Savanta: ComRes, an independent research organisation, to conduct the eighth 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



Sample

A total of 3,501 interviews were conducted with a demographically representative sample of UK adults (18+).



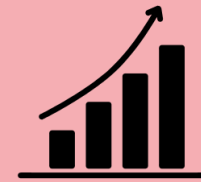
Method

Interviews were conducted online and over the telephone.
Online - 3001
Telephone – 500



Fieldwork dates

11th Oct – 5th Nov 2019



Interpretation

With a sample size of 3,501 the margin of error on results at a 95 per cent confidence level is ± 1.66
Findings marked with an asterisk (*) indicate a low base size. These results should be treated with caution.
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	Category	Sub-category	Weighted proportion	Unweighted proportion
Gender	Male	49%	49%	Region	North East	5%	4%
	Female	51%	51%		Yorkshire & Humber	8%	8%
Age	18-34	29%	28%		North West	11%	11%
	35-54	36%	36%		East Midlands	7%	7%
	55+	35%	36%		West Midlands	9%	9%
Working Status	Full time	41%	41%		London	13%	12%
	Part time	16%	18%		South East	14%	14%
	Not working	9%	8%		East England	9%	9%
	Retired	21%	22%		South West	8%	8%
	Homemaker	8%	8%		Wales	5%	5%
	Student	4%	3%		Scotland	8%	8%
				Northern Ireland	3%	3%	

Demographic (Weighted) Sample Profile

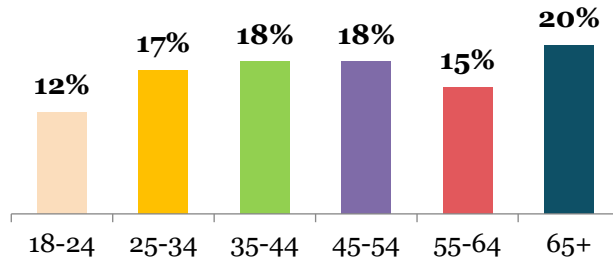
Gender



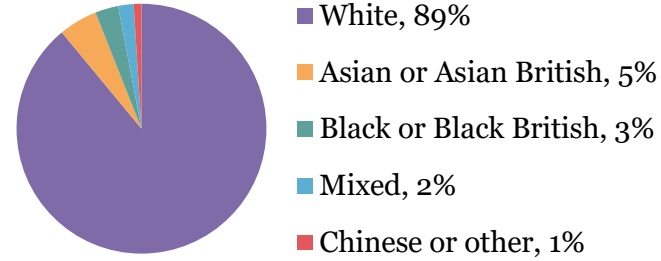
Male
49%

Female
51%

Age



Ethnicity



Internet Access

99 per cent of those interviewed by phone have internet access



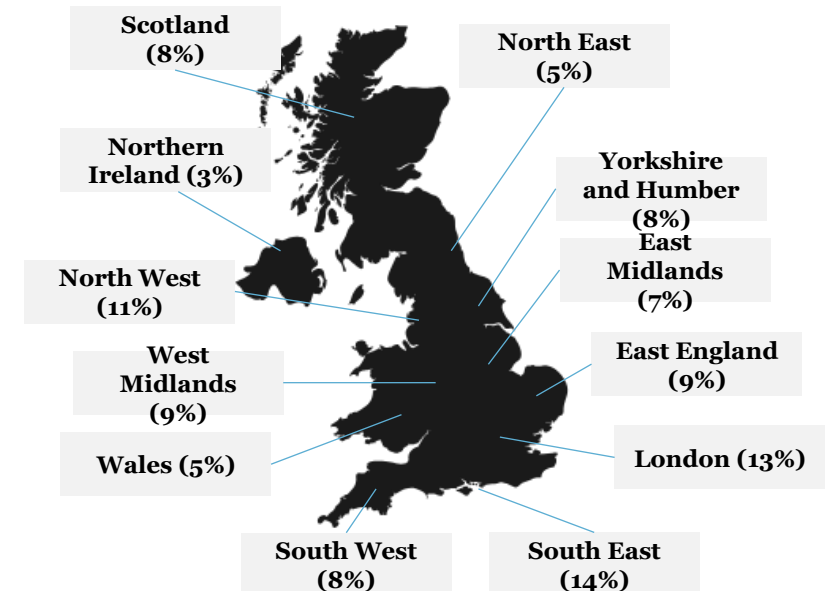
Working Status

Full time (30+ hours per week)	41%
Part time (8-29 hours per week)	15%
Part time (Under 8 hours per week)	1%
Not working	9%
Retired	21%
Homemaker	8%
Student / full time education	4%

Household Income

Up to £14,999	18%
£15,000 - £24,999	18%
£25,000 - £39,000	27%
£40,000 - £74,999	22%
£75,000 or more	7%

Regions



Headline measures

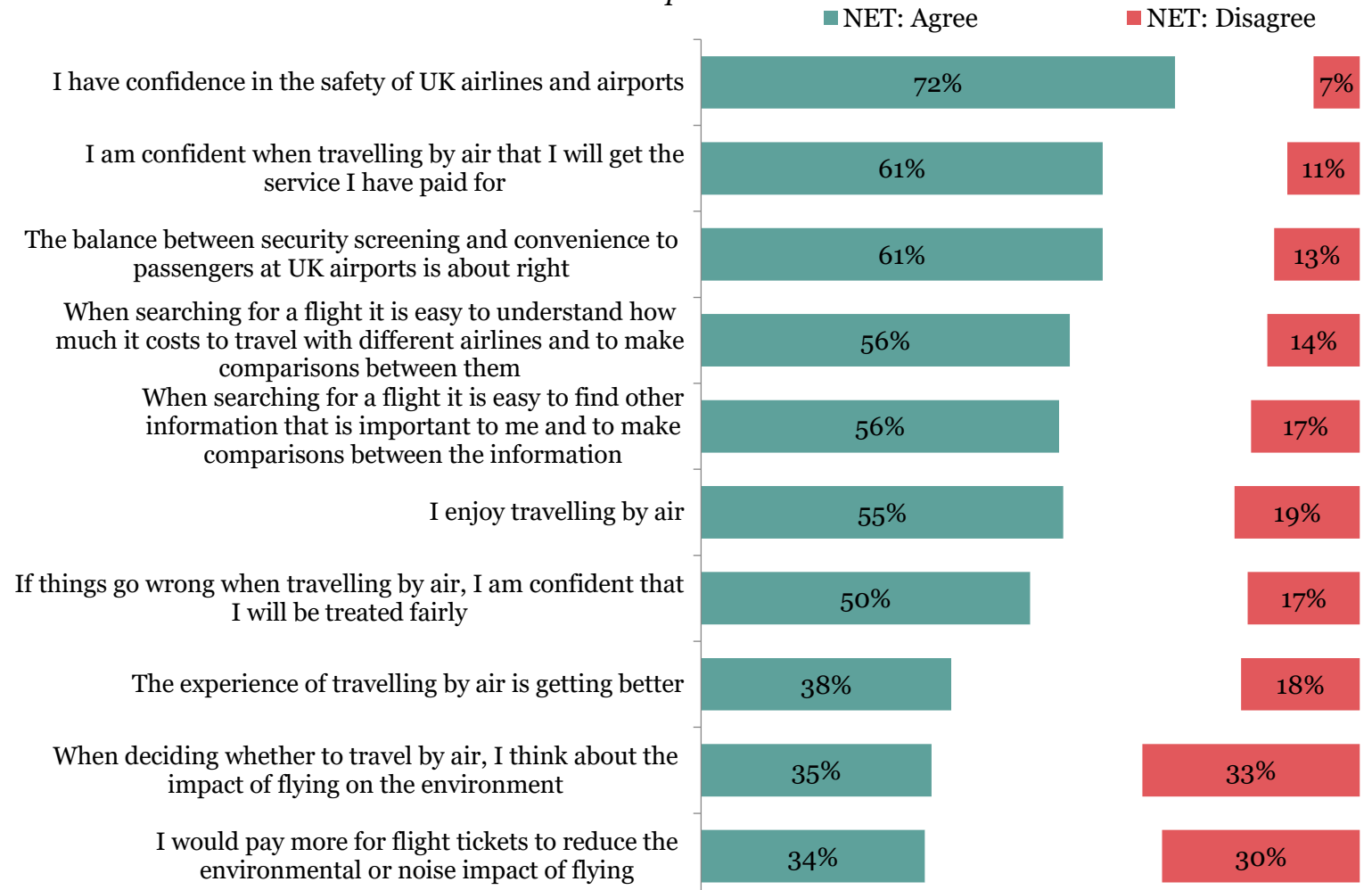


Confidence in the safety of UK airlines and airports has risen since wave 7

Over seven in ten (72%) UK adults have confidence in the safety of UK airlines and airports, rising 3 percentage points from 69% in wave 7. There is a general increase across the board in agreement with the statements with all metrics reporting higher figures than in the previous wave conducted in Apr 2019.

Statements about travelling by air

All respondents



Agreement with statements about travelling by air

Demographic analysis

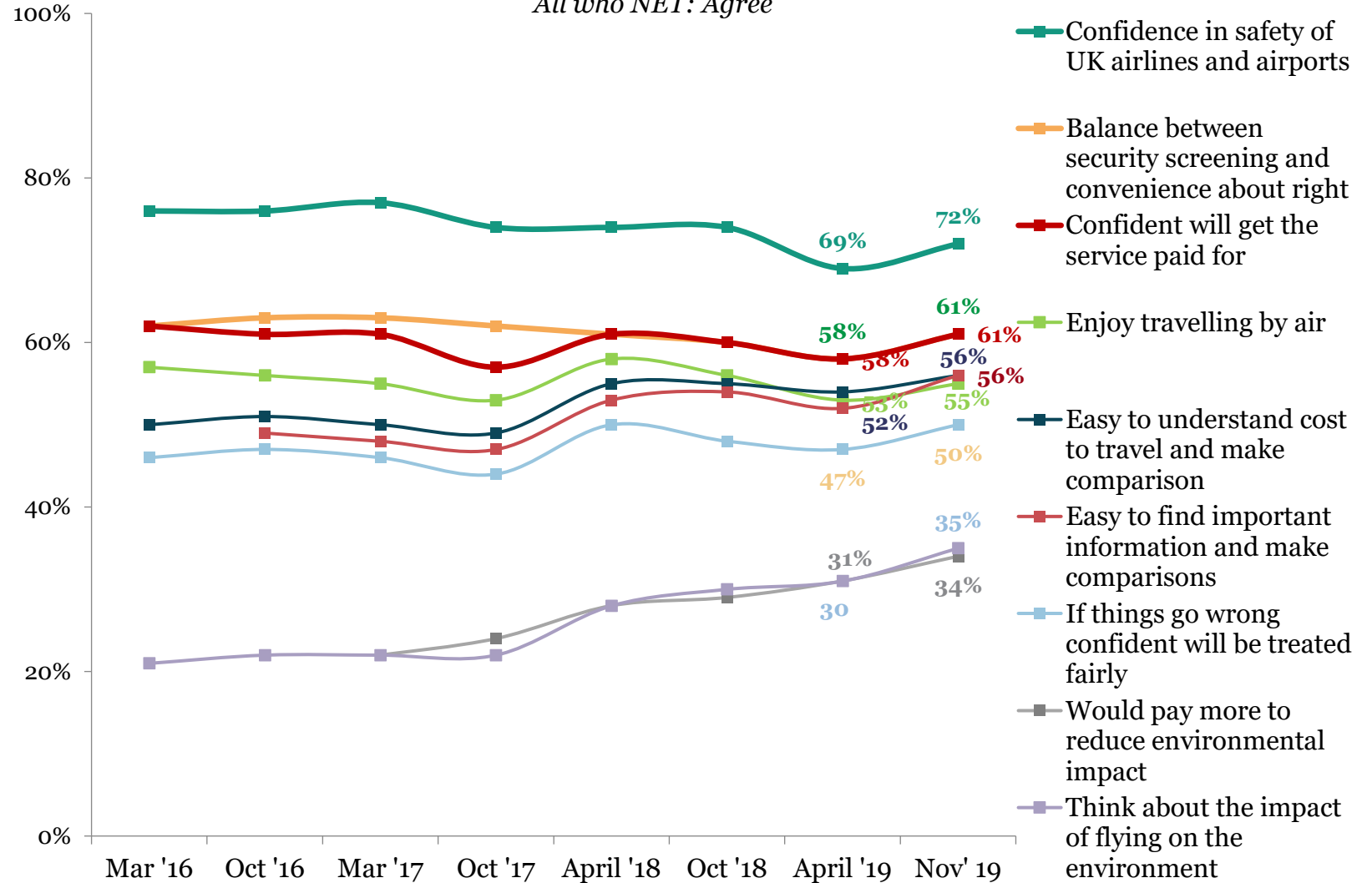
	Statements about travelling by air					
	NET: Agree			NET: Disagree		
I have confidence in the safety of UK airlines and airports	72%	▲ Age 55+ 77%	▲ >£50k 81%	7%	▲ Age 18-34 11%	▲ East Midlands 11%
I am confident when travelling by air that I will get the service I have paid for	61%	▲ >£50k 67%	▲ North East 68%	11%	▲ N. Ireland 16%	
The balance between security screening and convenience to passengers at UK airports is about right	61%	▲ >£50k 70%	▲ South West 68%	13%	▲ N. Ireland 31%	
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	56%	▲ >£50k 67%	▲ North West 61%	14%	▲ Age 55+ 19%	
When searching for a flight it is easy to find other information that is important to me and to make comparisons between the information	56%	▲ >£50k 67%	▲ North West 63%	14%		
I enjoy travelling by air	55%	▲ >£50k 64%	▲ Full time employment 62%	19%	▲ Age 55+ 22%	▲ East England / South West 23%
If things go wrong when travelling by air, I am confident that I will be treated fairly	50%	▲ >£50k 56%	▲ North West 56%	17%	▲ Northern Ireland 26%	
The experience of travelling by air is getting better	38%	▲ 18-34 47%	▲ London 43%	18%	▲ Age 55+ 23%	
When deciding whether to travel by air, I think about the impact of flying on the environment	35%	▲ 18-34 40%	▲ London 42%	33%	▲ >£50k 37%	▲ Northern Ireland 49%
I would pay more for flight tickets to reduce the environmental or noise impact of flying	34%	▲ Age 18-34 43%	▲ London 40%	30%	▲ Age 55+ 35%	▲ Northern Ireland 42%

Positive views towards travelling by air have seen a slight incline in the last 6 months

All metrics have increased slightly, by around 3 percentage points compared to passenger responses in Autumn last year. Confidence in safety of UK airports and airlines has risen to nearly three quarters (72%). The environmental consciousness of passengers is the area that continues to increase the most. More than a third now say that they would think about the environmental impact of flying (35%), or would pay more to reduce this impact (34%) continuing a steady increase since tracking began.

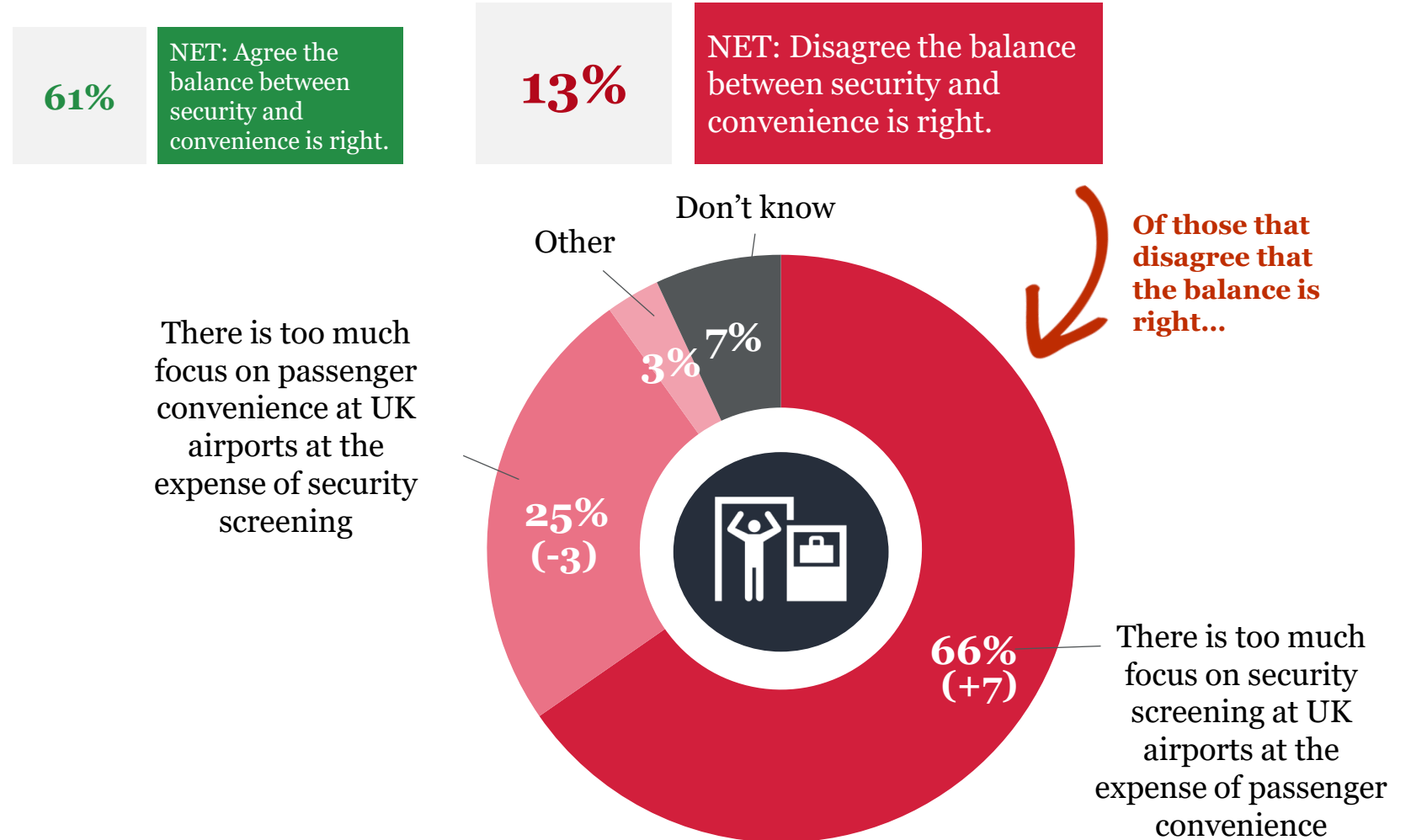
Headline Measures: Trend

All who NET: Agree



The majority of people still think that the balance between security and convenience is right

Three in five (61%) respondents agree that the balance between security and convenience is right, up 3 percentage points from the previous wave. Of those who disagree, two thirds (66%) think there is too much focus on security screening at UK airports, up 7 points from wave 7. A quarter (25%) think there is too much focus on passenger convenience.



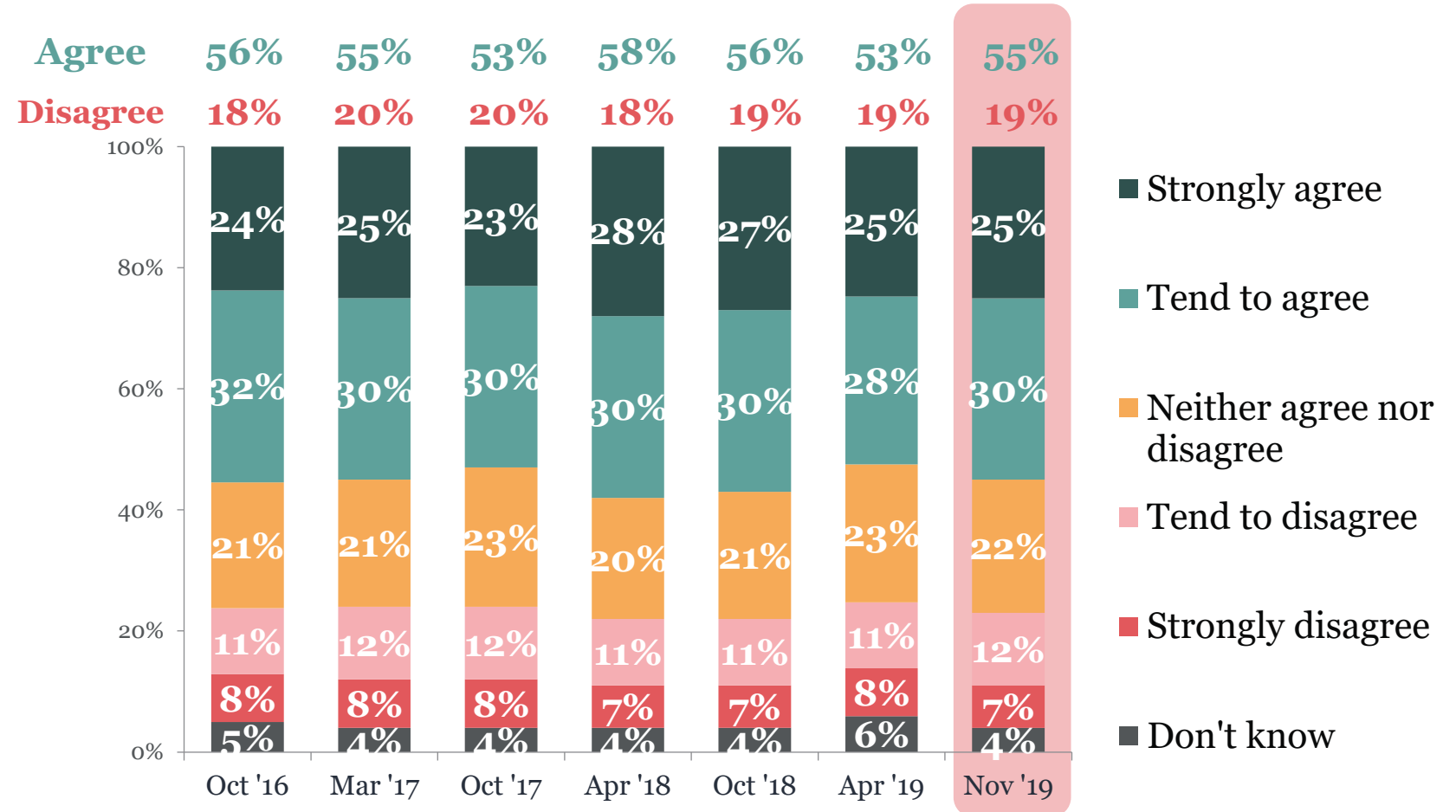
UK adults are slightly more likely to agree that they enjoy travelling by air, but this is still below 2018 levels

Headline measures: Overall

I enjoy travelling by air

In wave 8 55% of respondents say they enjoy travelling by air, up by 2 percentage points from wave 7, but this is still lower than the wave 5 and wave 6 results (58% and 56% respectively).

The proportion of respondents who disagree has not changed over the last 3 waves.



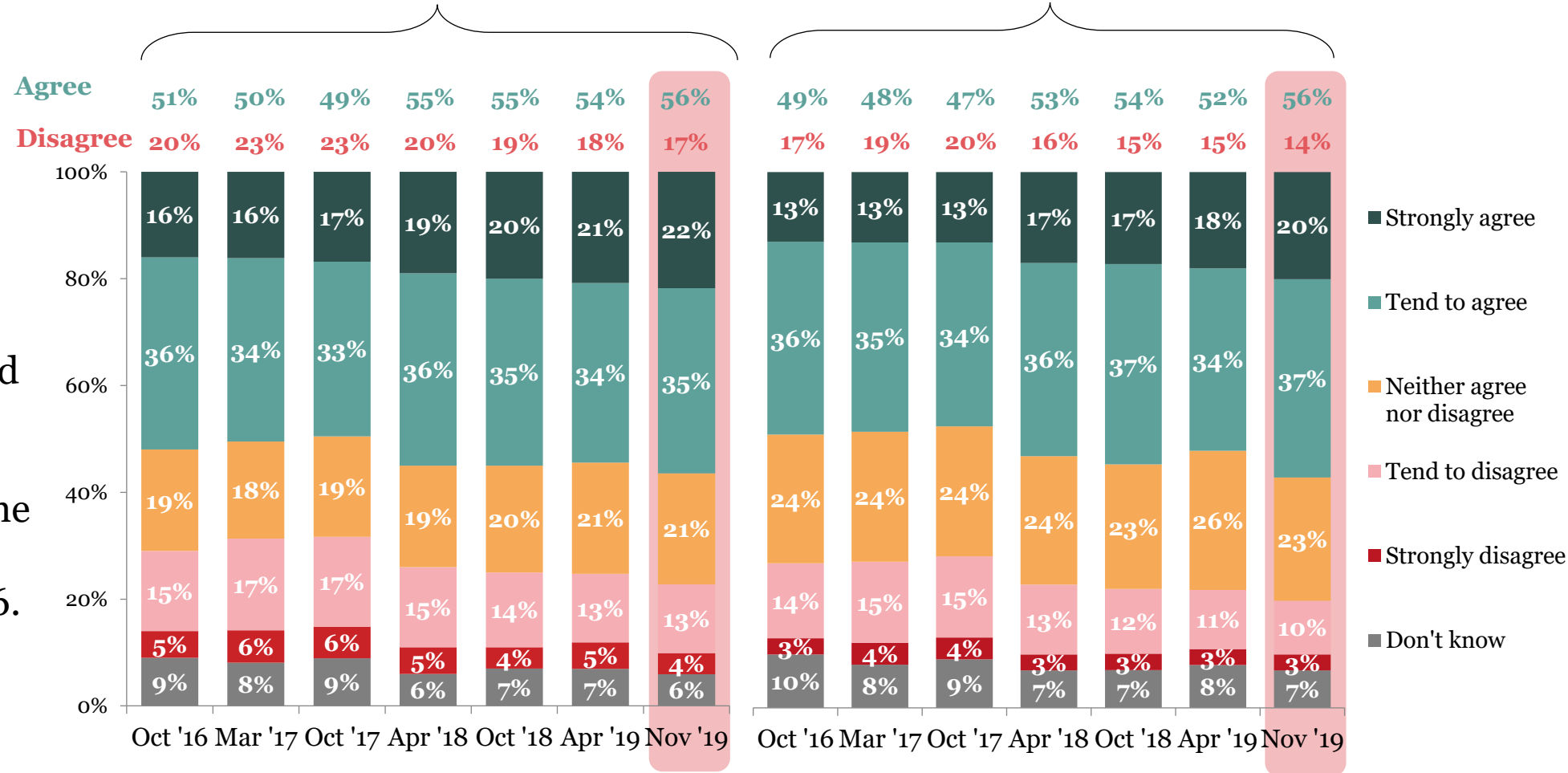
More UK adults strongly agree that it is easy to understand the cost of travel and find comparison information than ever before

Headline measures: Consumer Choice

Easy to understand how much it costs to travel with different airlines and to make comparisons between them

Easy to find other information that is important to me and to make comparisons between the information

In both categories, 56% agree that it is easy to understand comparison data about how much it costs between airlines and information that is important to the respondents. These are the highest figures since the tracker began in Oct 2016.



Confidence in fair treatment when things go wrong has increased since Spring 2019

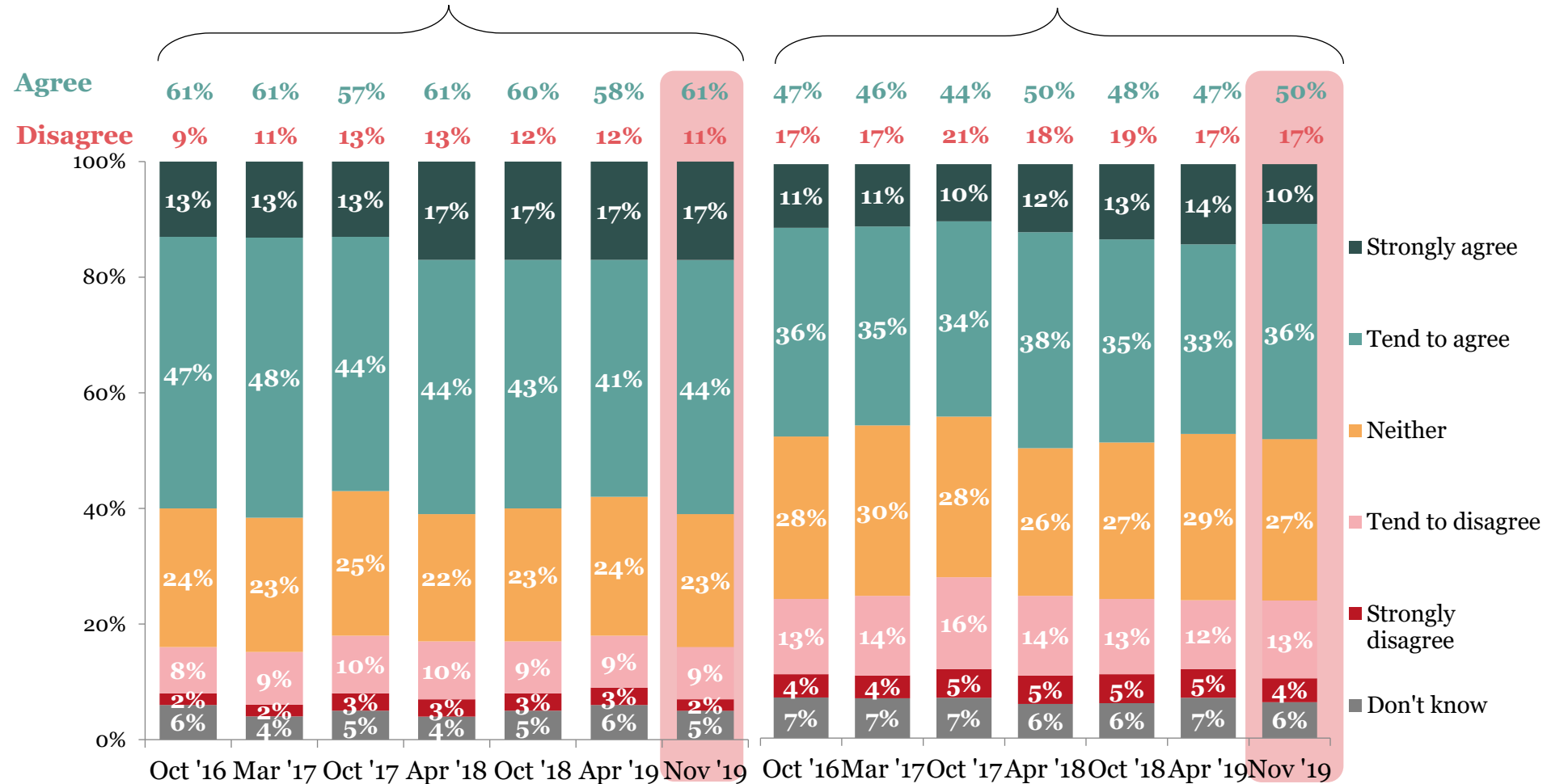
Headline measures: Consumer Confidence

Confident I will get the service I paid for

If things go wrong, I am confident I will be treated fairly

UK adults are more likely to agree that if things go wrong, they would be confident that would be treated fairly. This metric has risen 3 percentage points from wave 7 (47% to 50%) and is at the highest it has been since April 2018.

Confidence in getting the service paid for has risen by 3 percentage points and is now back to April 2018 levels.



The security and safety headline measures have both improved since Apr 2019

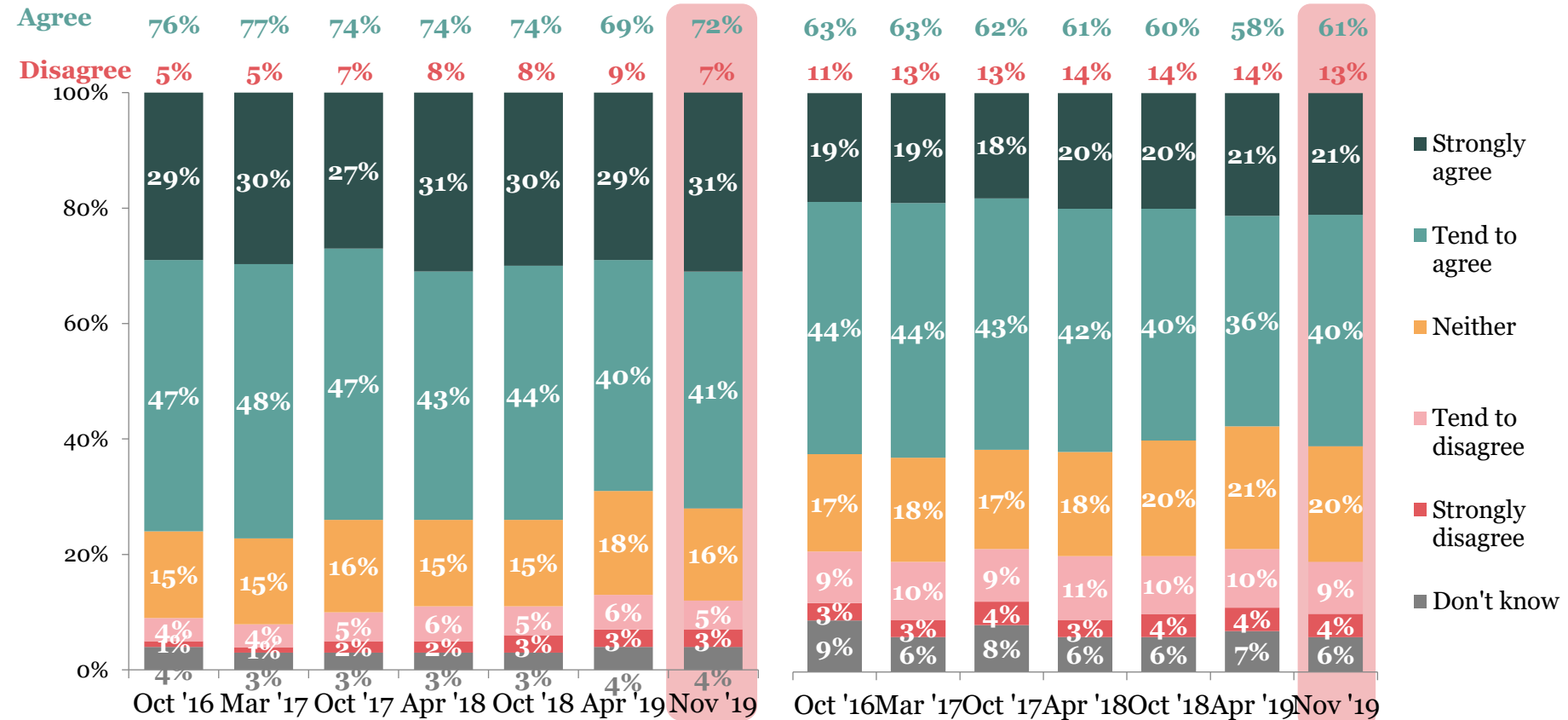
Headline measures: Security and Safety

Confidence in the safety of UK airlines and airports

Balance between security screening and convenience about right

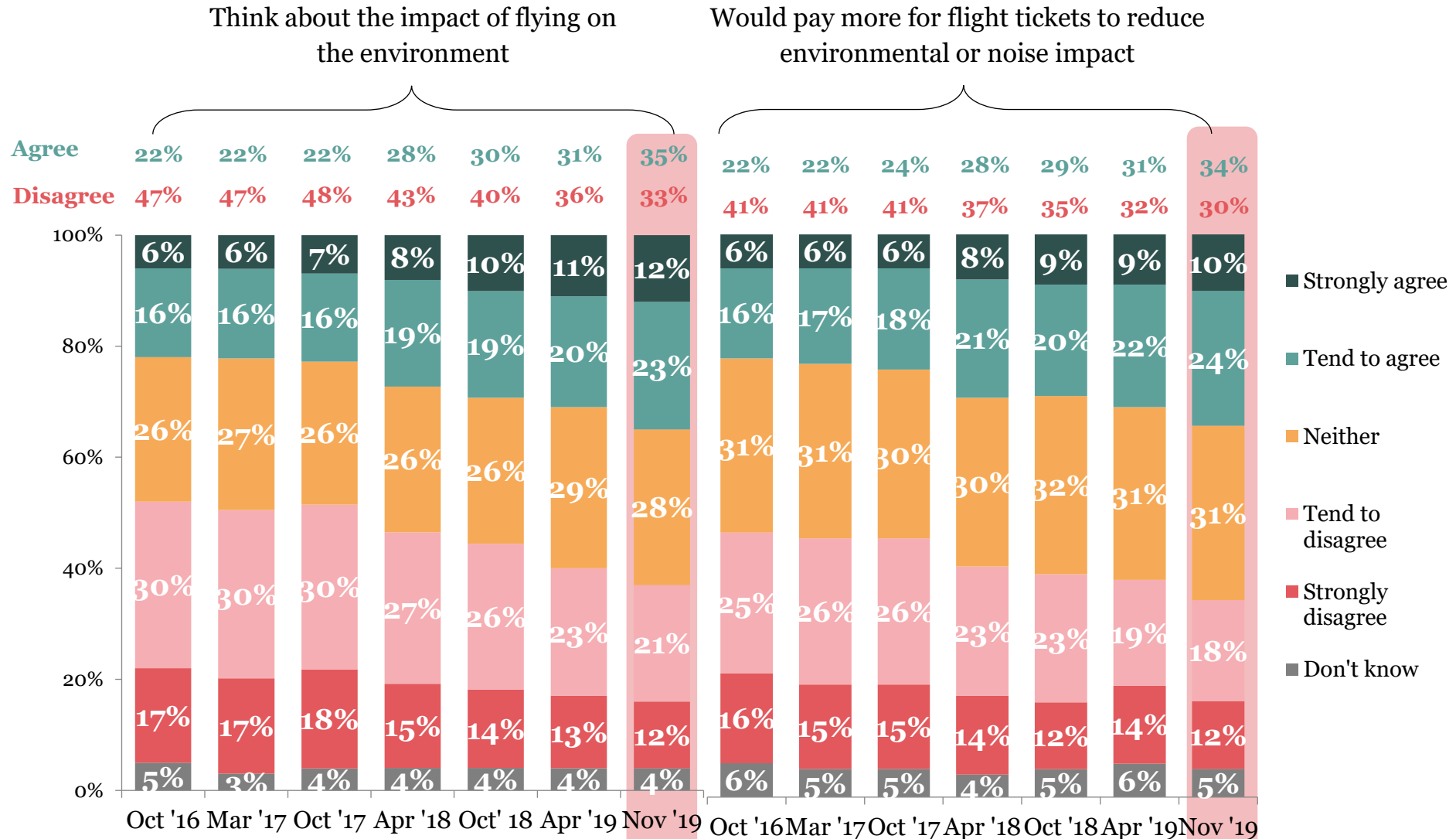
Nearly three quarters (72%) of respondents agree that they have confidence in the safety of UK airlines, up 3 percentage points from April 2019, but still far lower than the 76% of Oct 2016.

The proportion who say the balance between security and convenience is about right has returned to its April 2018 level of 61%.



Over a third of UK adults think about the impact of flying on the environment

Headline measures: Environment



The proportion of UK adults who disagree with the statement that they think about the impact of flying on the environment has fallen 14 percentage points since Oct 2016. For the first time in the tracker in both measures, more people are likely to agree than disagree.

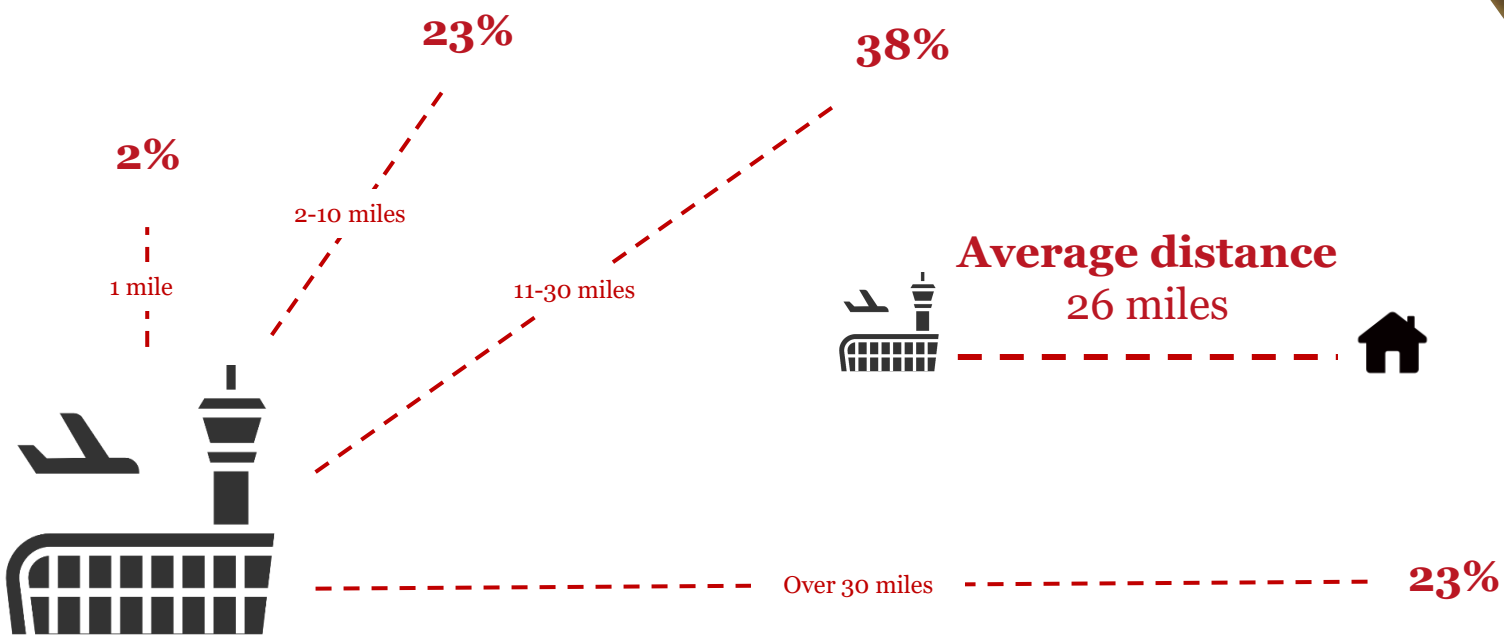
Flying Behaviour



Just a quarter of respondents say they live within 10 miles of an airport



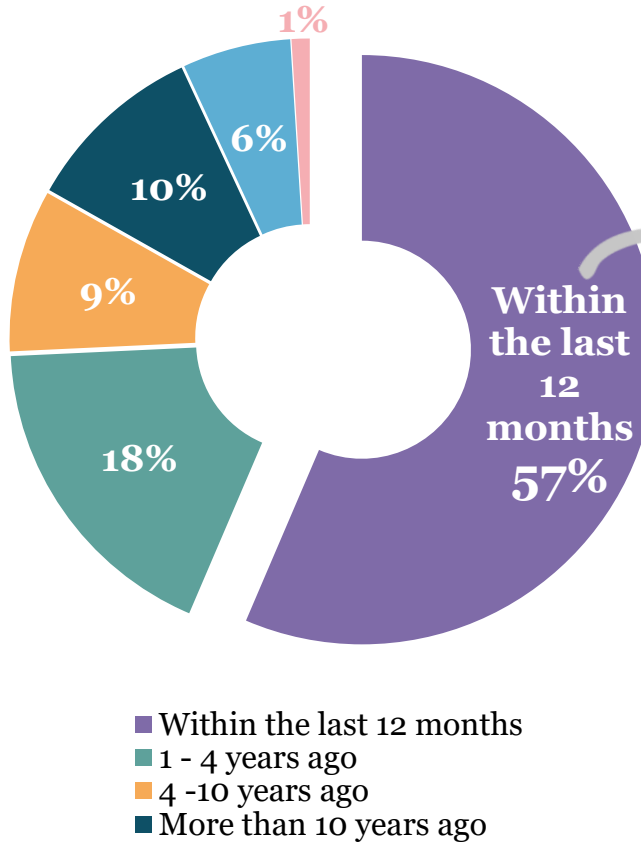
Distance living from nearest airport



Nearly three in five UK adults have flown from a UK airport in the last 12 months

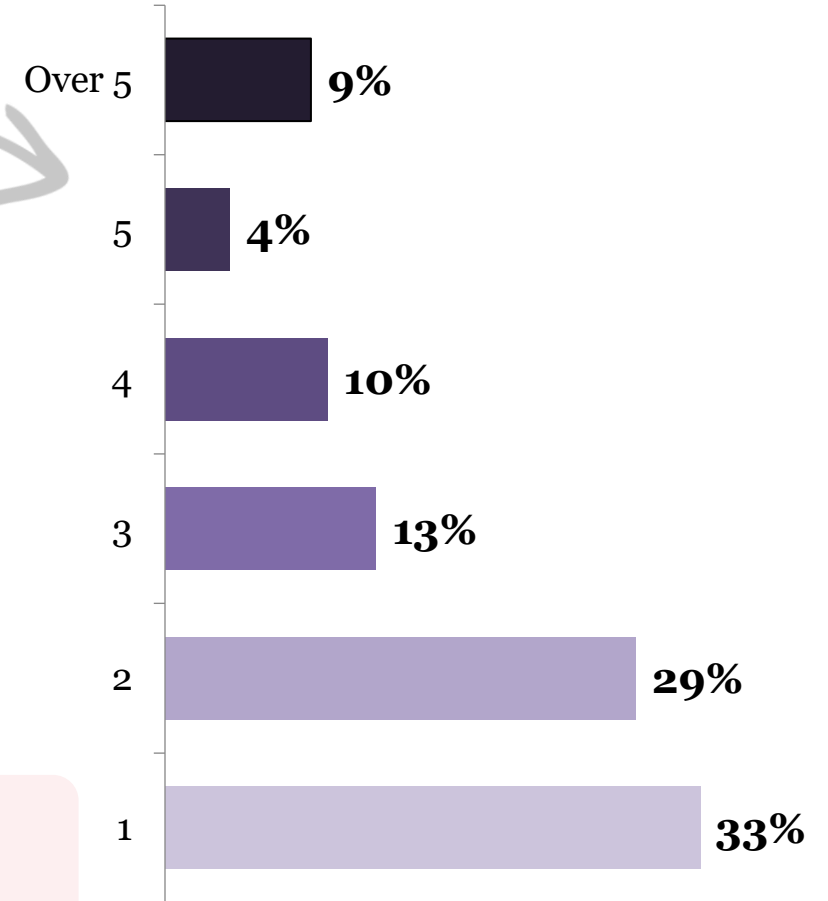
The proportion of UK adults who say they have flown in the last 12 months has risen 6 percentage points from 51% to 57% since Spring 2019, with one in ten (9%) of those having flown more than 5 times in the last 12 months.

Time since flight from a UK airport



Number of flights in the last 12 months

All those who have flown in the last 12 months



Don't know: 2%

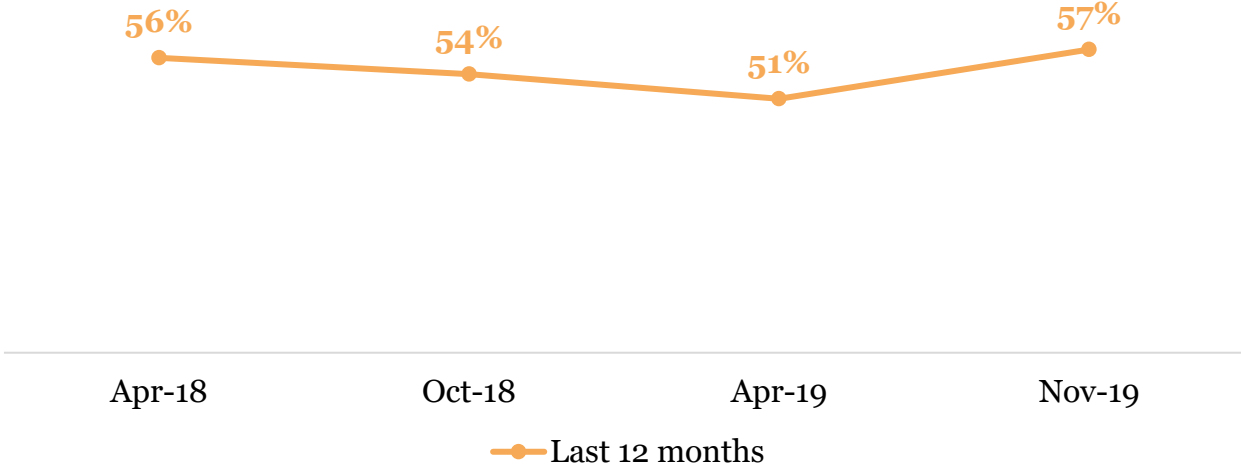
Within last 12 months:

- ▲ London 66%
- ▲ Northern Ireland 69%
- ▲ H.I. >£50k 81%
- ▲ October 2018 51%

18 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=3501)
 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=1994)

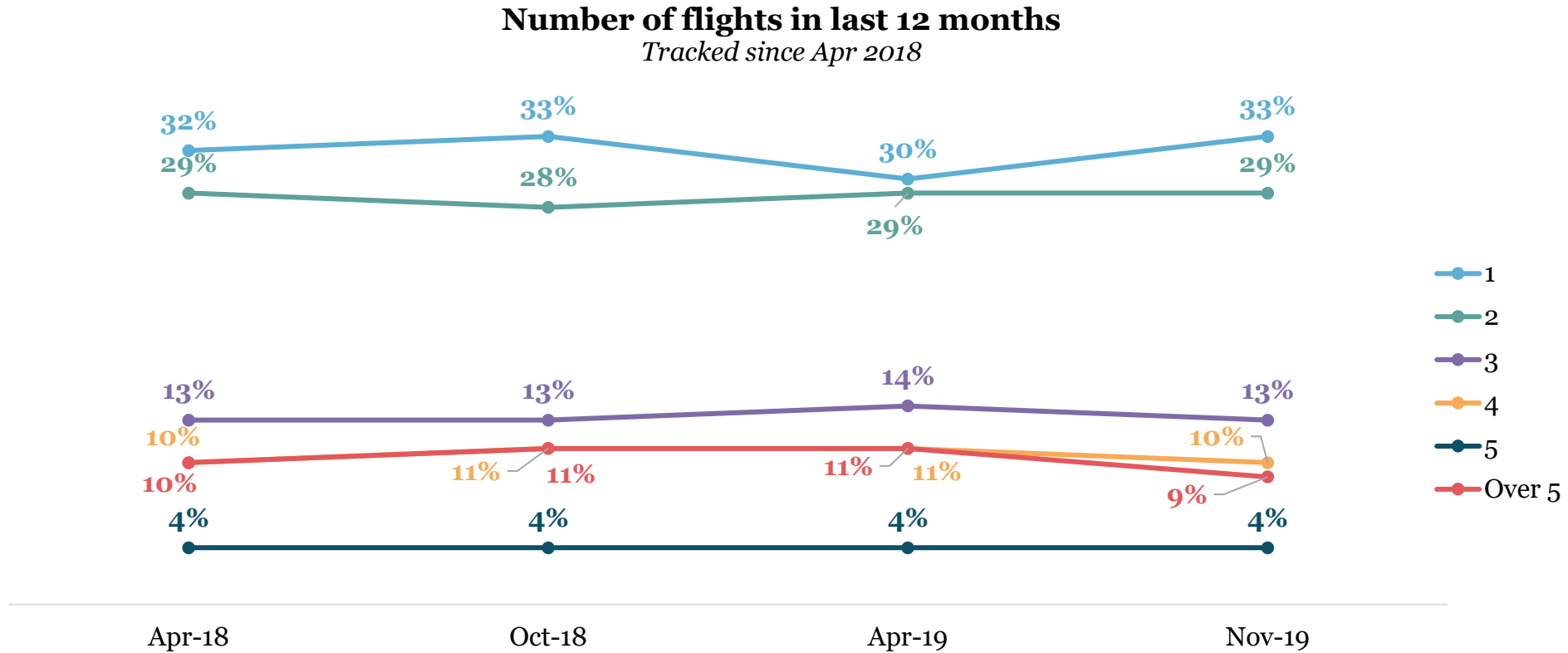
A higher proportion of people have flown in the last 12 months than any year tracked

Frequency of flying
Tracked since August 2018



The proportion of people who have flown in the past 12 months is higher than in recent waves of the aviation tracker, returning to levels last seen in August 2018. In November 2019, approaching three in five (57%) respondents report having flown in the last 12 months. This has increased by six percentage points from April 2019, when just half (51%) of respondents said the same.

The proportion of people taking different numbers of flights has remained consistent since April 2018



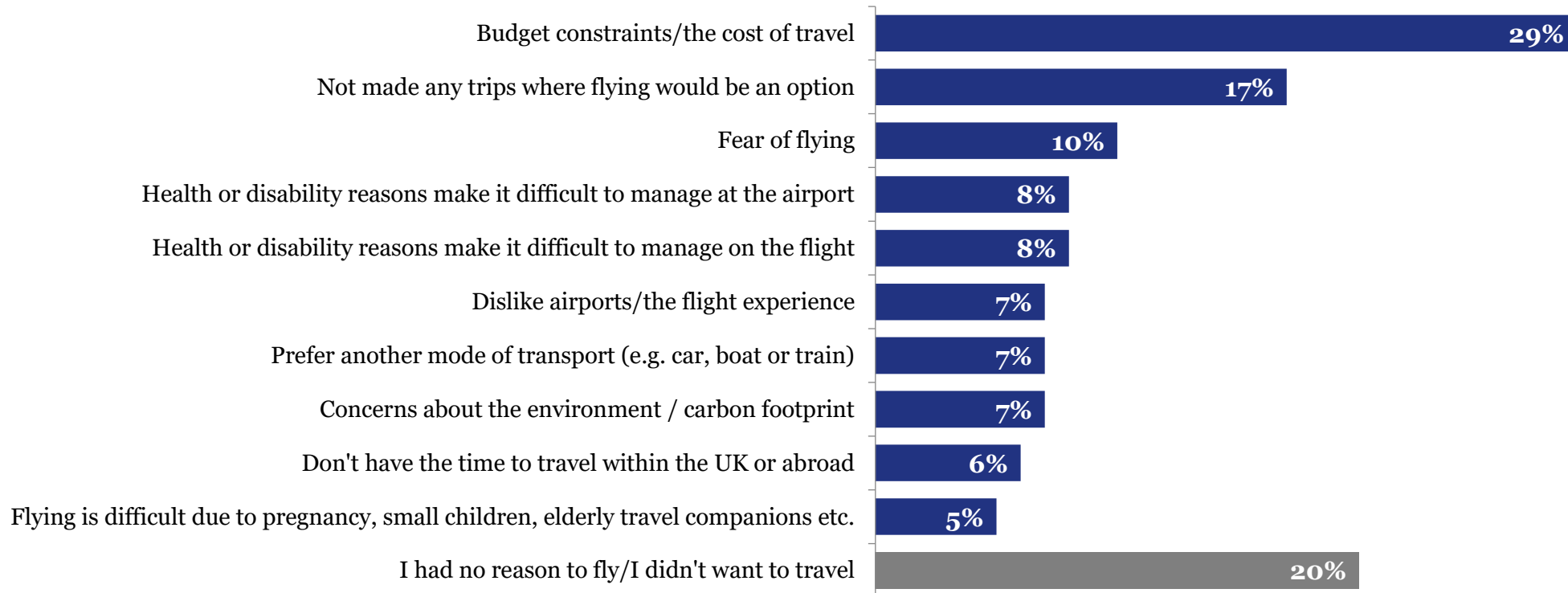
The proportion of people who have taken one flight in the last 12 months has risen by three percentage points since April 2019 (33% November 2019; 30% April 2019). Otherwise, most measures remain consistent.

Budget constraints and the cost of travel remains the largest barrier to flying in the past 12 months

Barriers to flying in the past 12 months

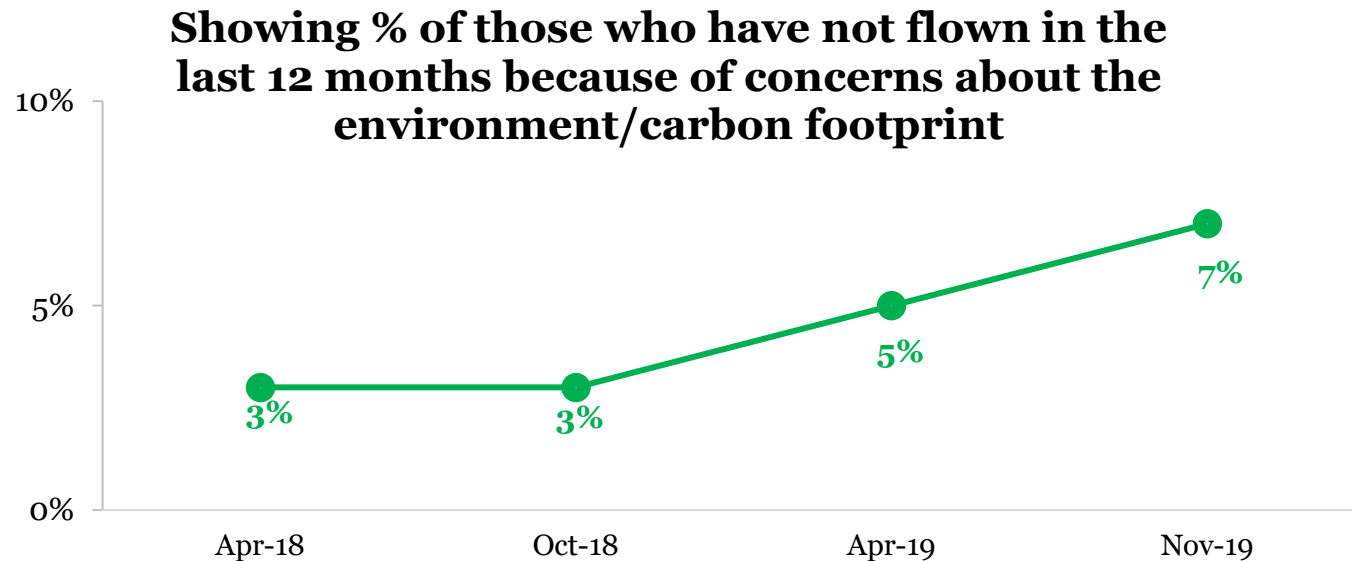
All those who have not flown recently

Showing all responses of 5% and over



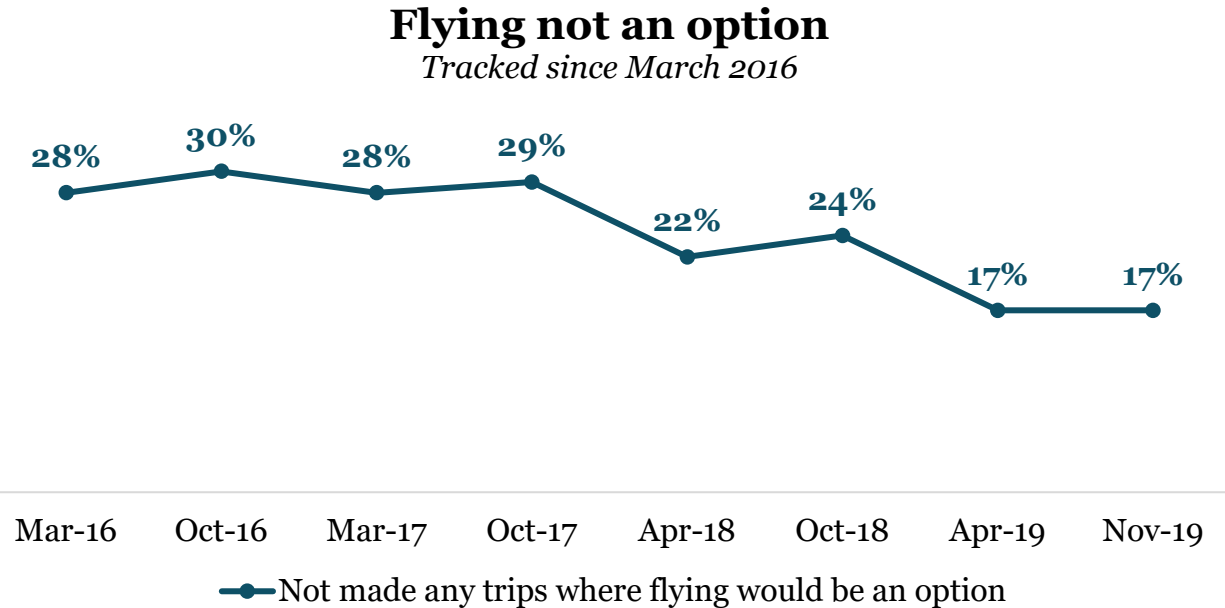
Budget constraints and/or the cost of travel remain the most common barriers to flying in the last year, with 29% of non-recent flyers citing this as the main reason. This has decreased slightly compared to the results of the previous wave (31% in April 2019).

The proportion of passengers not flying due to environmental concerns has doubled since April 2018



In wave 5 of the aviation tracker, just 3% of respondents who had not flown in recent memory did so because of the environment or carbon footprint concerns. This figure has been rising and as of November 2019 is now at 7% of those who have not flown in recent memory. For those with a household income over £50,000, one in ten (9%) have not flown because of these concerns in wave 8.

Fewer people say they have not flown because they have not made trips where flying would be an option



In November 2019, those who have not flown in the last 12 months/in the last few years/never flown are 11 percentage points less likely than they were in March 2016, to say the reason they have not flown recently is because they have not made trips where flying would be an option.

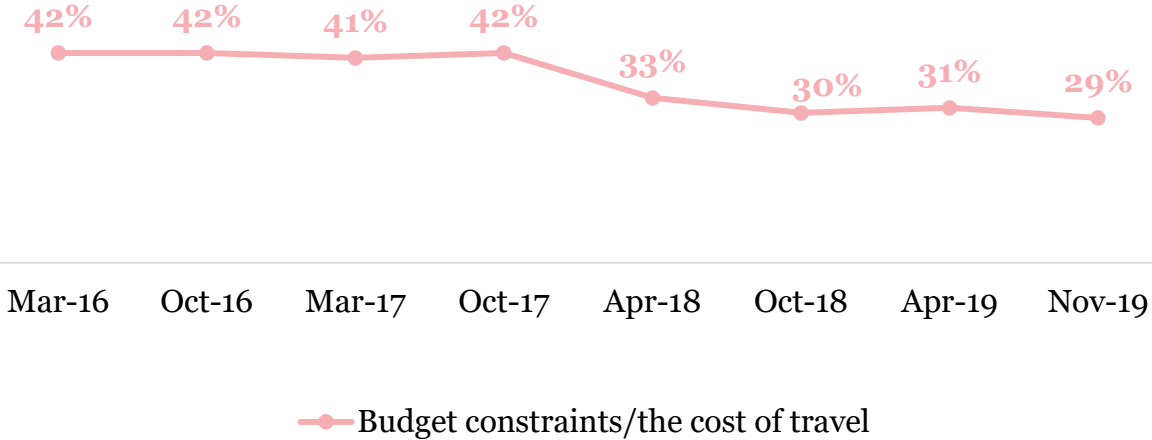
Between March 2016-October 2017 around three in ten respondents (March 2016 28%; October 2016 30%; March 2017 28%; October 2017 29%) said the reason they have not flown recently was because they have not made trips where flying would be an option. This is compared to less than one in five in April 2019 and November 2019 who say the same (17% for both).

This decline might indicate the increased availability of air travel to a variety of destinations.

Fewer people report the cost of travel as a reason they have not flown



Cost of Travel
Tracked since March 2016



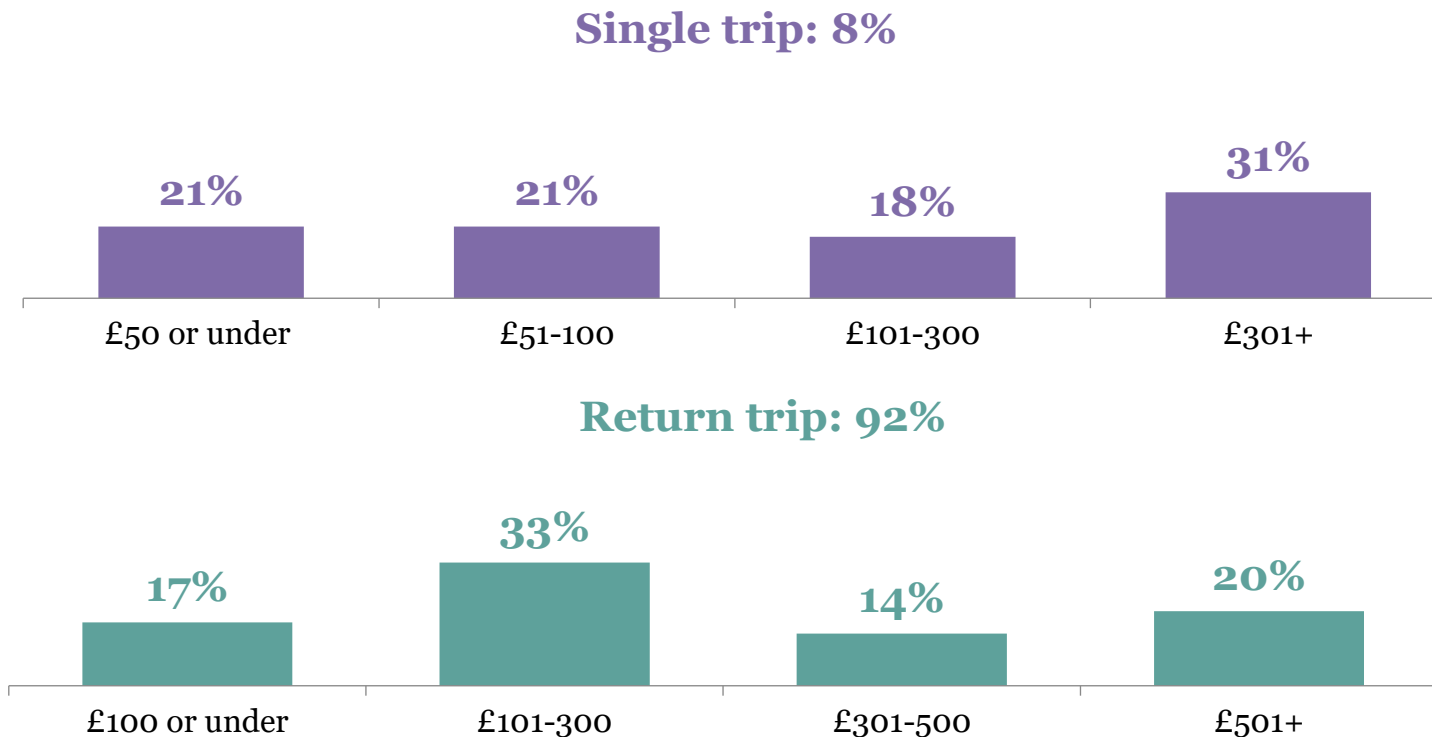
The proportion of respondents who say the cost of travel is the reason they have not flown recently has steadily declined since March 2016. In November 2019, respondents are 13 percentage points less likely than in March 2016 to cite budget constraints as a reason they have not flown recently.

Between March 2016 to October 2016 around two in five respondents (March 2016 42%; October 2016 42%; March 2017 41%; October 2017 42%) said the reason they had not flown recently was the cost of travel. This is compared to just three in ten (29%) in November 2019.

Though the amount of return trips has increased, the amount of £101-300 trips has fallen

Price paid for last flight

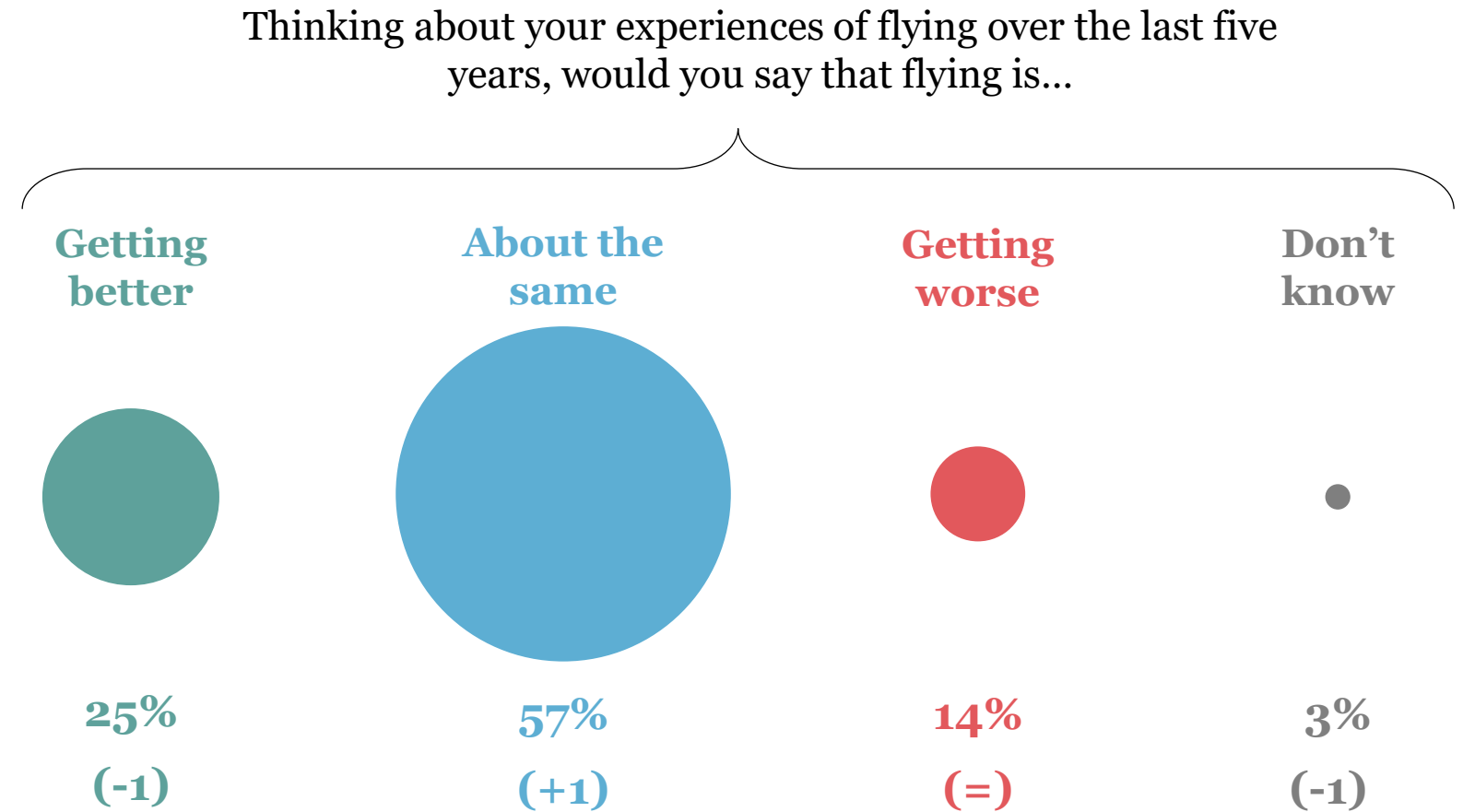
All those who have flown from a UK airport in the last 10 years



A vast majority of passengers who flew from a UK airport in the past 10 years purchased a return ticket and is 2 percentage points higher than in wave 7 (92% vs 90% respectively). The most common fare range for return trips is £101-300, with a third (33%) of respondents fitting in this bracket, though this is down 4 percentage points from the 37% registered in wave 7.

For the majority, their experiences of flying over the last five years remain about the same

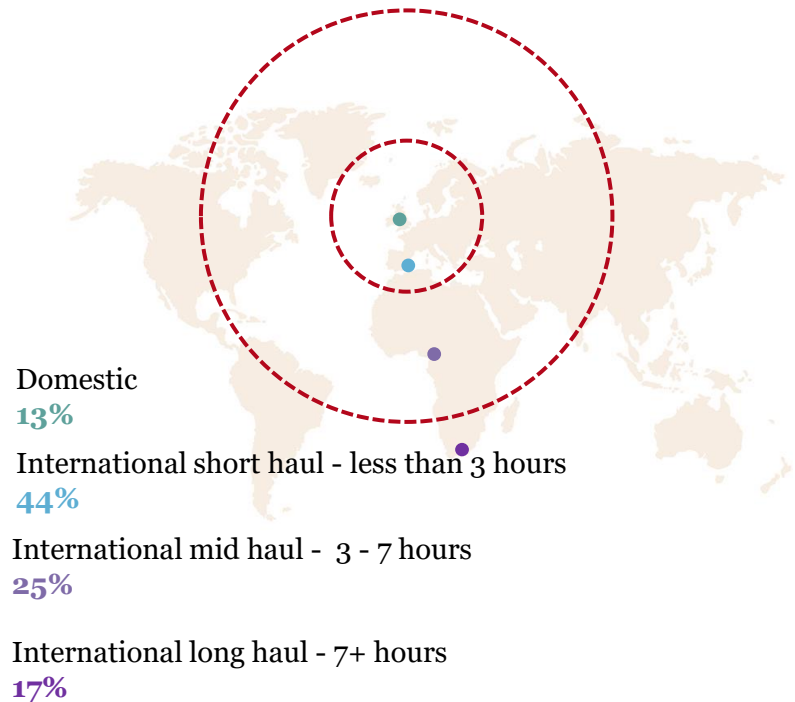
Over half (57%) of passengers say that their experience of flying is about the same as it has been over the past 5 years. The proportion who say it is getting better or worse (25%) have remained about the same as in wave 7.



More UK flyers report travelling from Gatwick than Heathrow for the first time

Domestic or international flights

All recent flyers



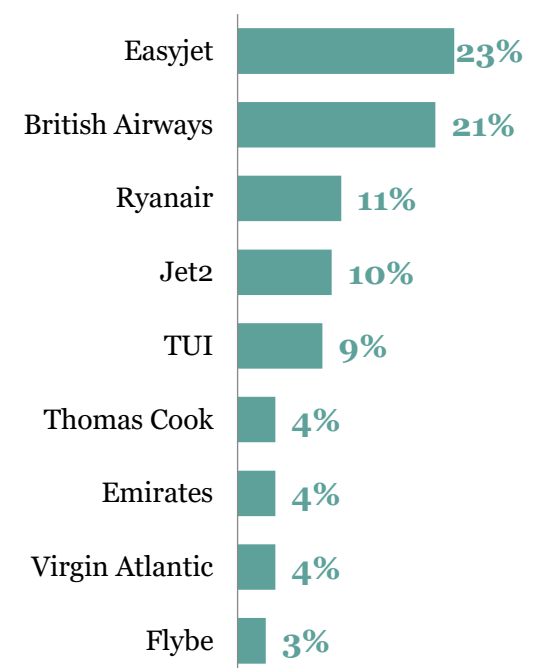
Departure airport

Used by >1%



Airline used

Used by >2%



International short haul flights of less than 3 hours remain the most common form of flight among recent flyers, with nearly half (44%) using these services.

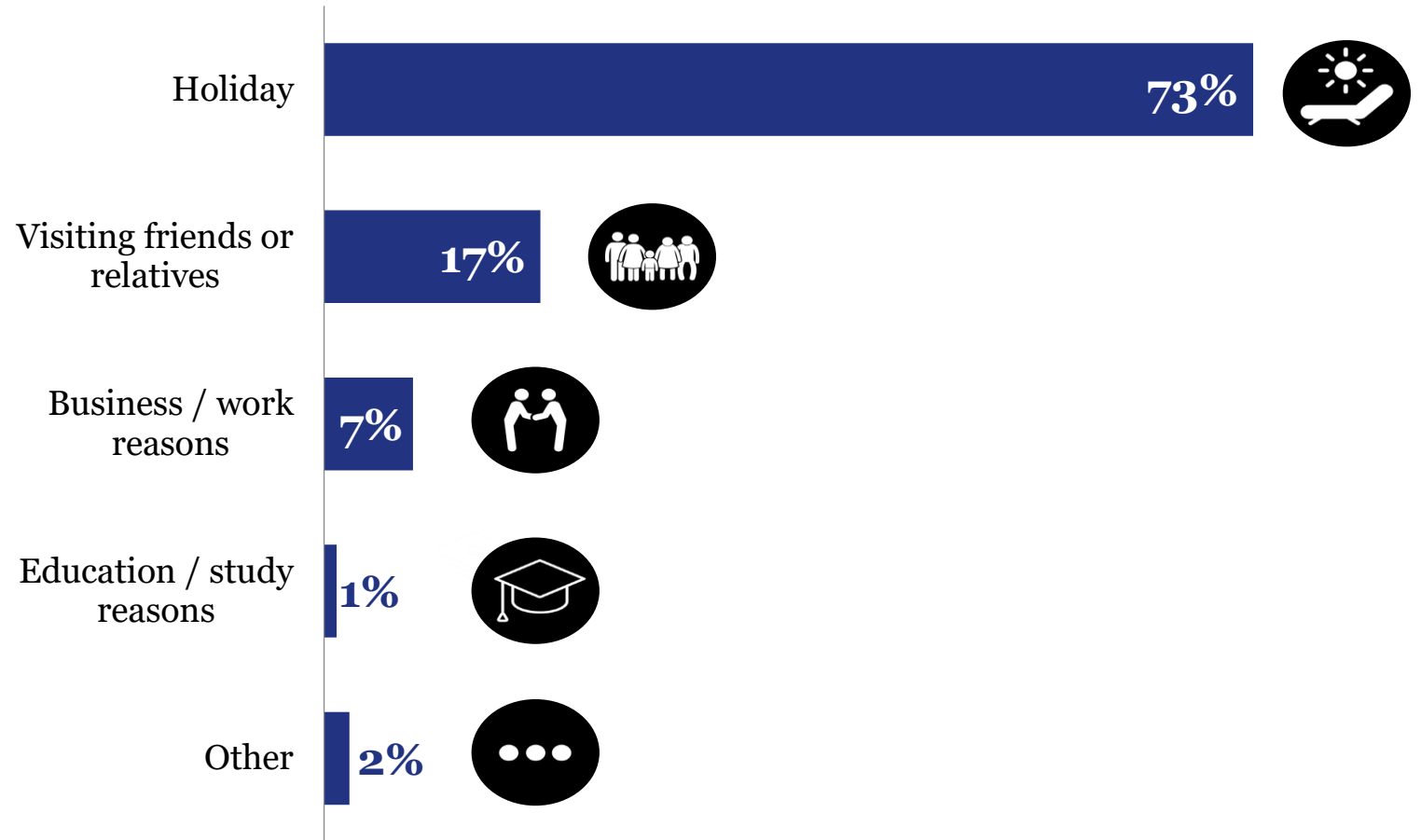
Just under three quarters of recent flyers travelled for holiday purposes

Seven in ten (73%) recent flyers travelled to go on holiday – the most common reason for flying and this has remained unchanged from wave 7.

One in six (17%) flew to visit friends or relatives, down 2 percentage point from wave 7 and fewer than one in ten (7%) travelled because of business/work, up 1 percentage point from wave 7.

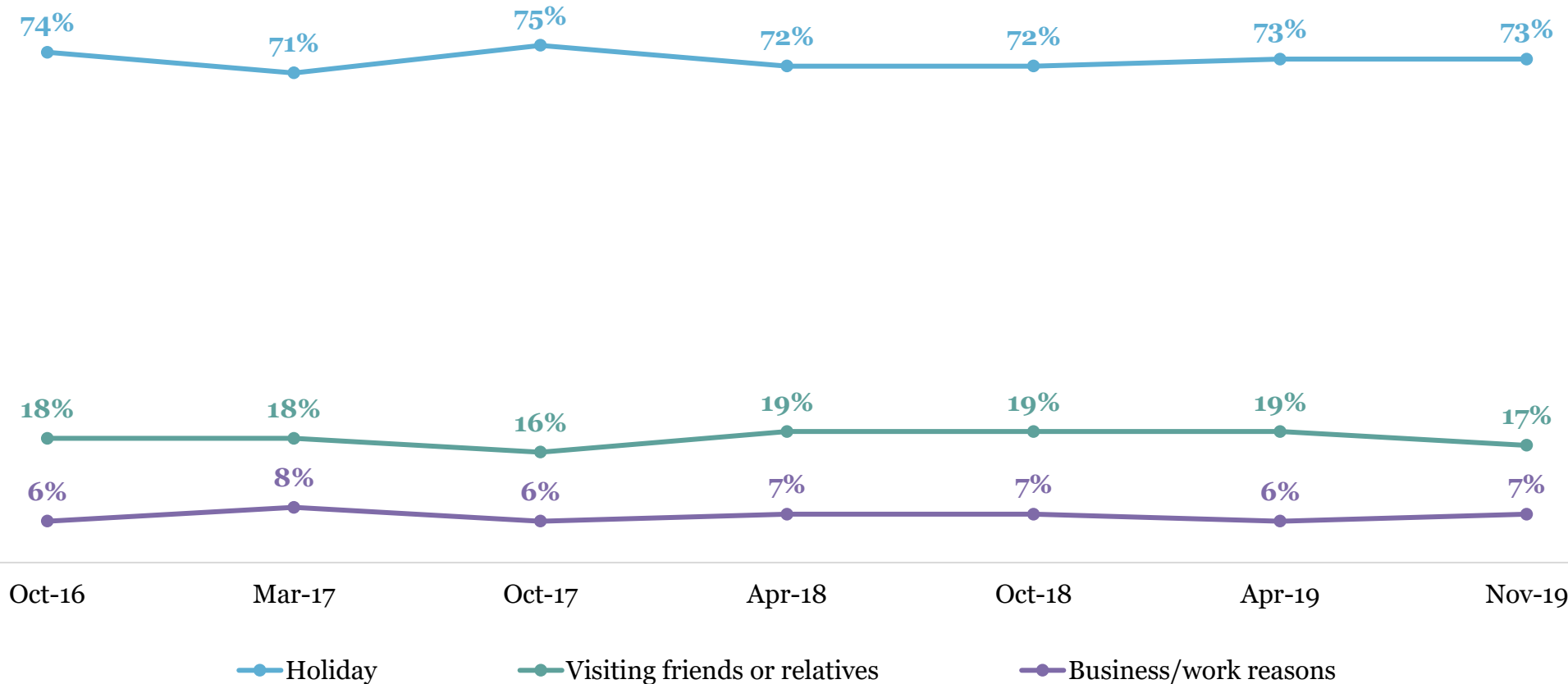
Main reason for last flight

All those who have flown in the last 12 months



The reasons people travel have remained consistent over time

Reason for last flight
Showing tracking since October 2016

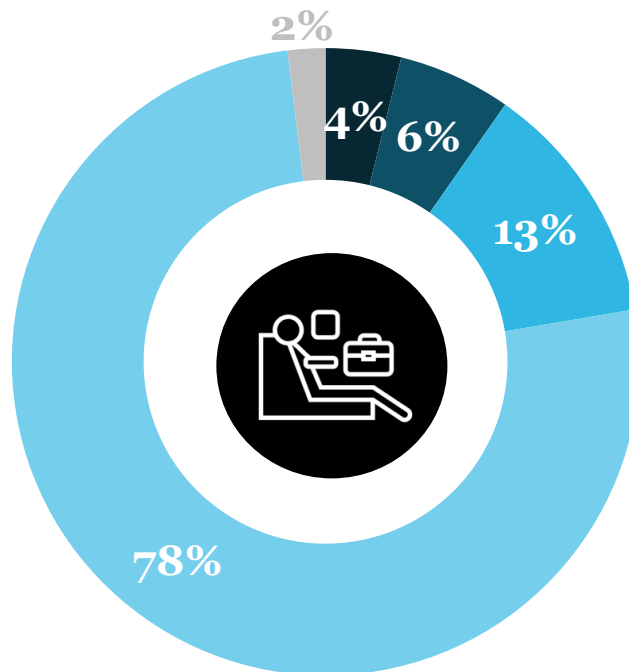


Economy class flights continue to make up the majority of flights

In their recollections, four in five (78%) recent flyers flew economy class, unchanged from wave 7. First class flying has stayed consistent from wave 7 dropping 5% to 4%. The proportion of passengers who flew with children has risen when compared to the previous wave (18% to 24%). Broadly, this figure is in line with the previous post-summer survey of Oct 2018 (27%).

Cabin class

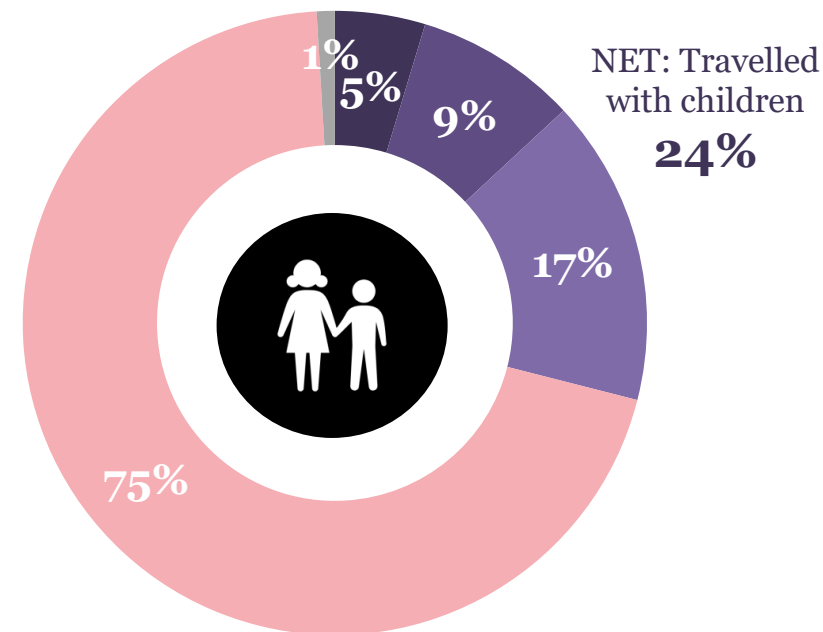
All those who have flown in the last 12 months



- 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
- Prefer not to say

30 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=1994)
 Q22. Did you travel with children on this occasion? Base: All who have flown from a UK airport in the last 12 months (n=1994)

Satisfaction ratings



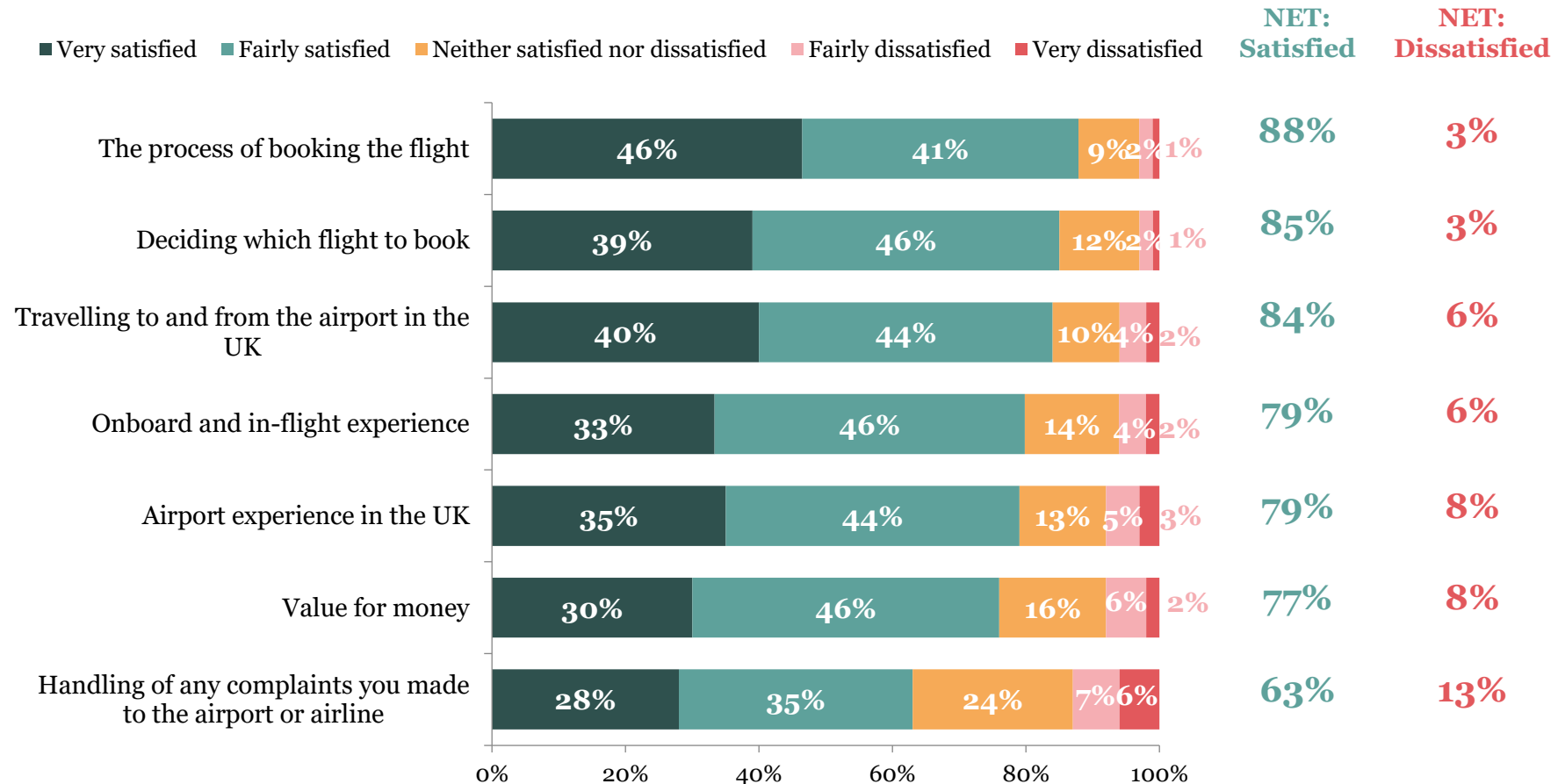
The process of booking the flight continues to be the most satisfactory element of passengers' UK bookings and airport experience

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'

Since October 2018, the process of booking the flight has been the element that passengers are most satisfied with, with wave 8 seeing a 2 percentage point rise to 88%.

Deciding which flight to book and travelling to and from the airport in the UK continue to make up the top factors that passengers are satisfied with.



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

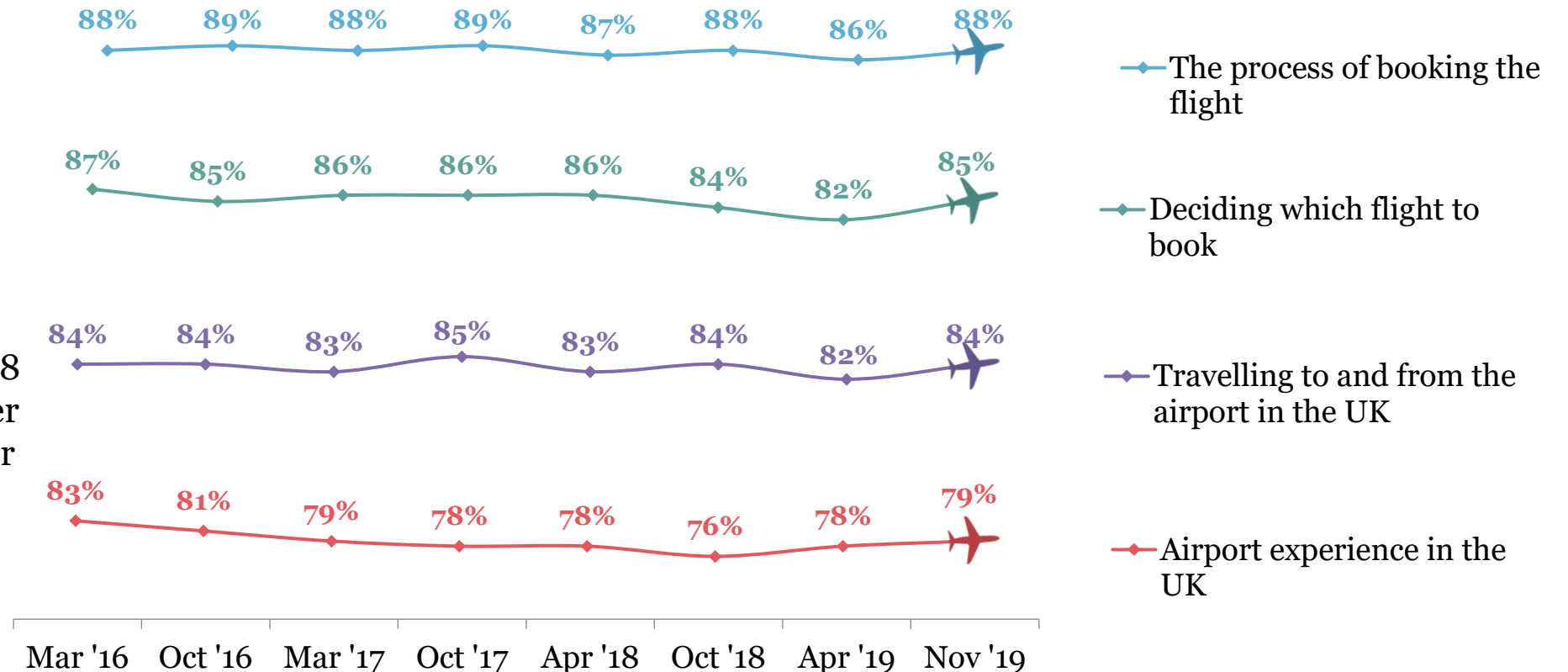
Demographic analysis



With the exception of the airport experience in the UK, levels of satisfaction with each area tested have increased slightly since April 2019

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

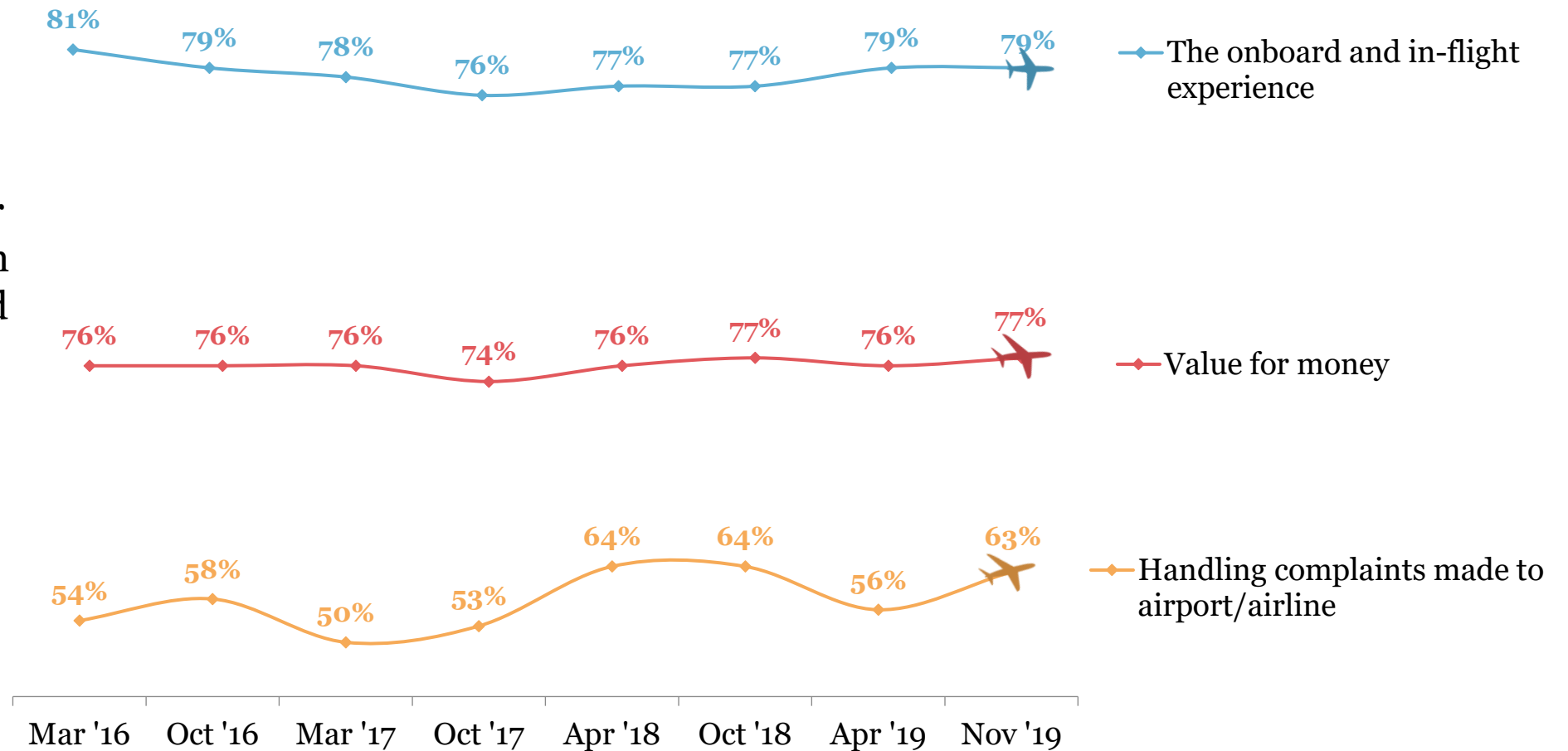
The proportion who say they were satisfied with the experience when deciding which flight to book has risen most sharply out of the top four statements (85% up from 82%). Airport experience in the UK continue its steady increase from 76% satisfaction in October 2018 (the lowest since the tracker began) to 79% in November 2019.



Satisfaction with complaints handling made to the airport/airline has increased significantly, however it remains lower than other metrics

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

Satisfaction with the onboard and in-flight experience (79%) has increased slightly since Autumn 2018. Value for money (77%) remains in line with levels recorded in October 2018. However, satisfaction with handling of complaints has risen from 56% to 63% since the previous wave.

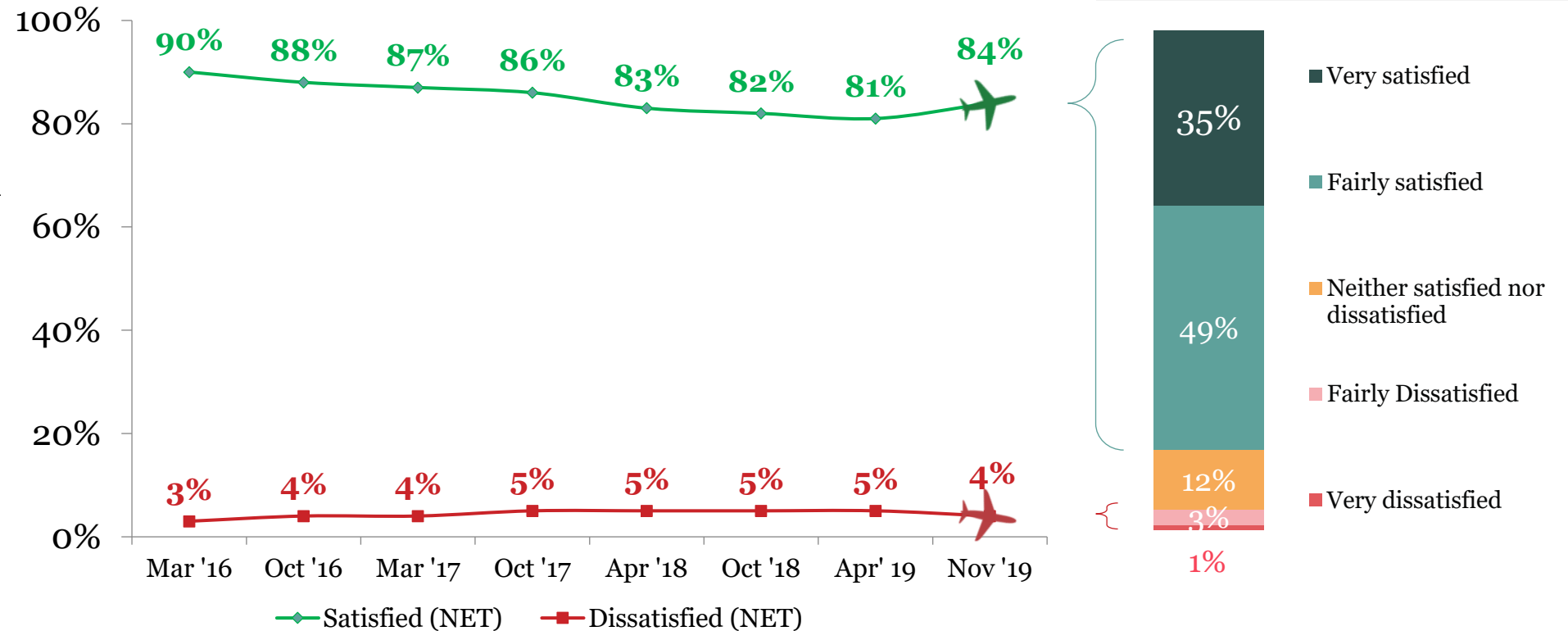


In line with the specific elements of the journey discussed, satisfaction with the overall travel experience has risen since April 2019

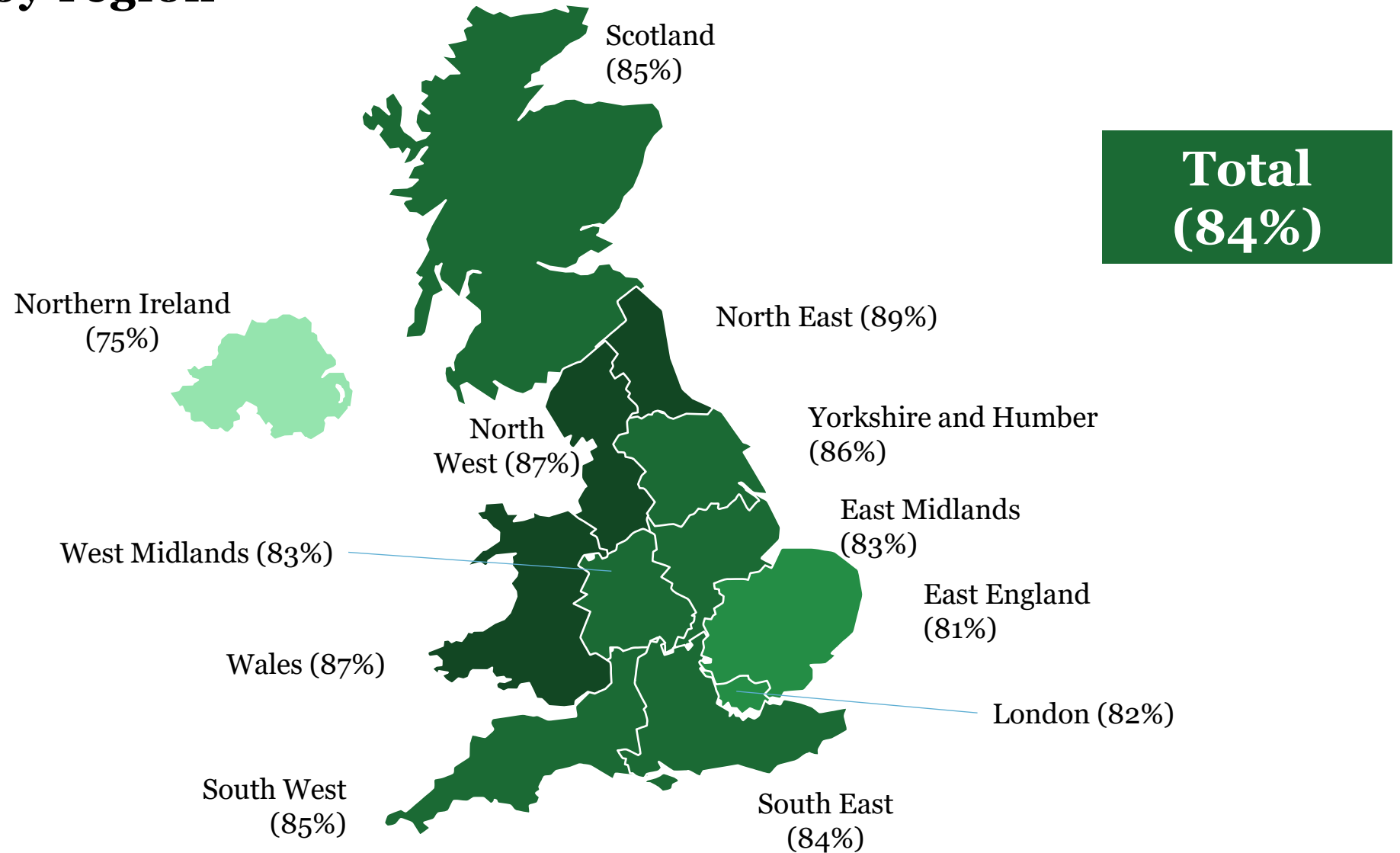
Last flight: Overall satisfaction

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

After a steady decline since the beginning of the tracker in March 2016, overall satisfaction of respondent's most recent flight has increased to 84%, with over a third saying they were very satisfied with this. Concurrently, only 4% say they were dissatisfied.



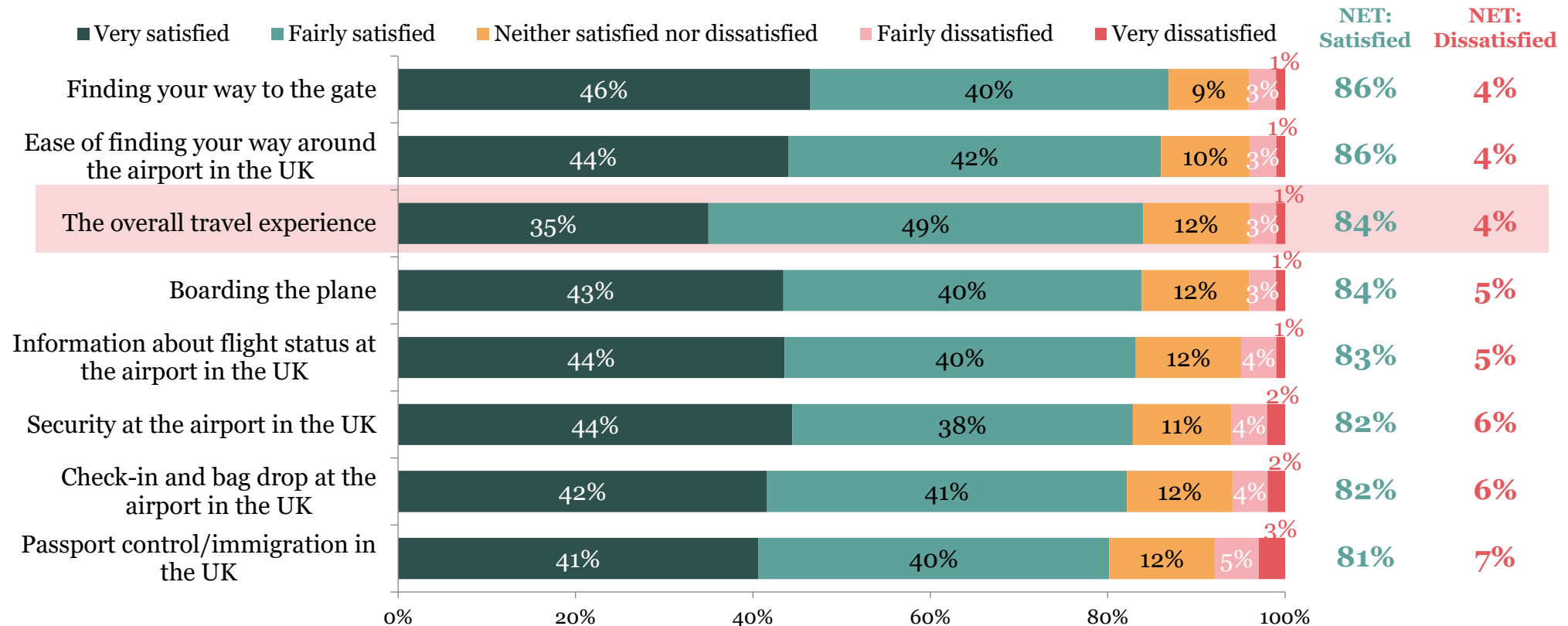
Showing NET: Satisfaction with overall travel experience of most recent flight – by region



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

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

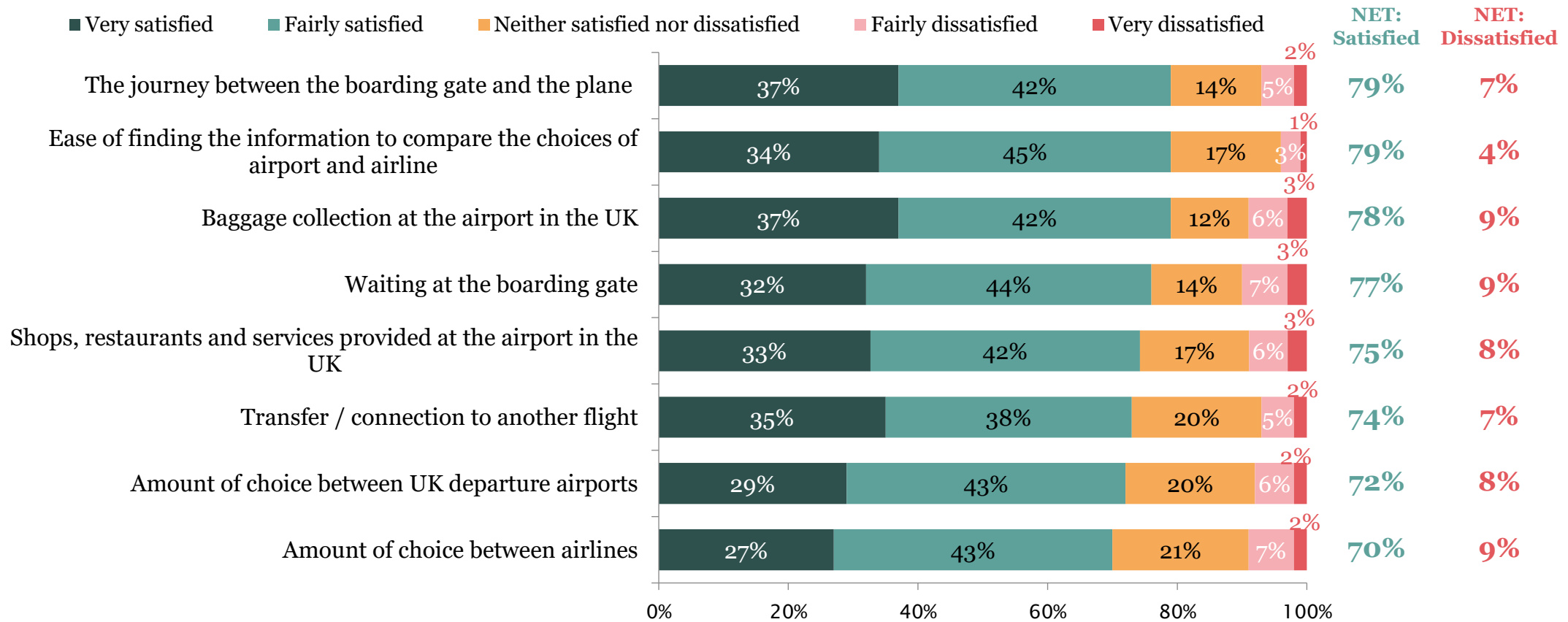
All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



For their most recent flight, passengers are least likely to have been satisfied with the amount of choice between airlines or between UK departure airports

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'

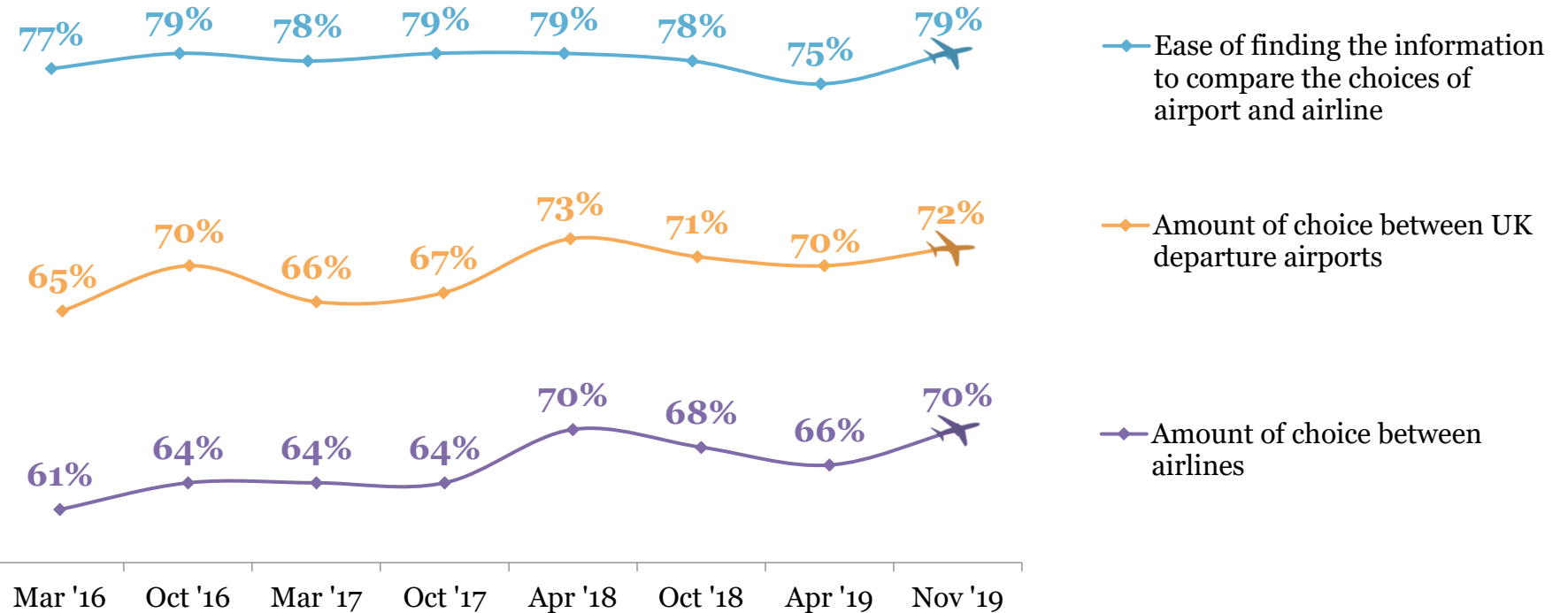


Levels of satisfaction with each element of the pre-booking process have increased by between 2 to 4 percentage points

As in each wave since 2016, with the exception of April 2019, around four in five passengers say they were satisfied with the ease of finding the information to compare their choices of airport and airline. This has returned to a high of 79%.

These increases see satisfaction in choice between UK departure airports and airlines of the UK airport experience stabilising, returning to levels seen in 2018 after a steady decline from the start of the tracker. This is despite levels of satisfaction with the amount of choice between UK departure airports or UK airlines being lowest out of all measures tested.

Last flight: Satisfaction with elements of pre-booking
% Satisfied

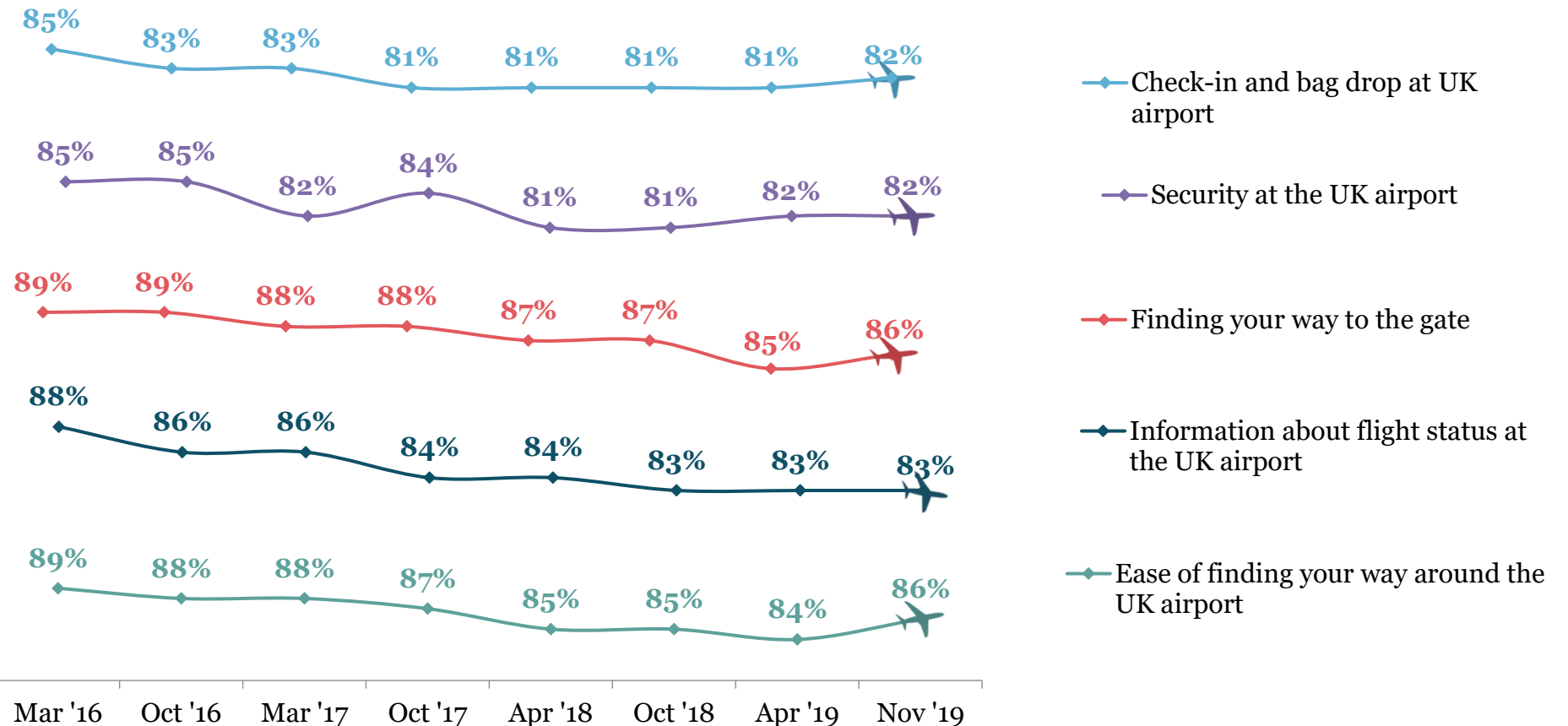


Levels of satisfaction with check-in and bag drop, information about flight status, and security at the UK airport have remained broadly consistent

Last flight: Satisfaction with airport experience

% Satisfied – Part 1

Recent flyers' satisfaction with each of these areas of the UK airport experience is consistent with the levels recorded in April 2019. With the exception of finding your way to the gate and finding your way around the airport in general, which have both increased slightly to 86%.

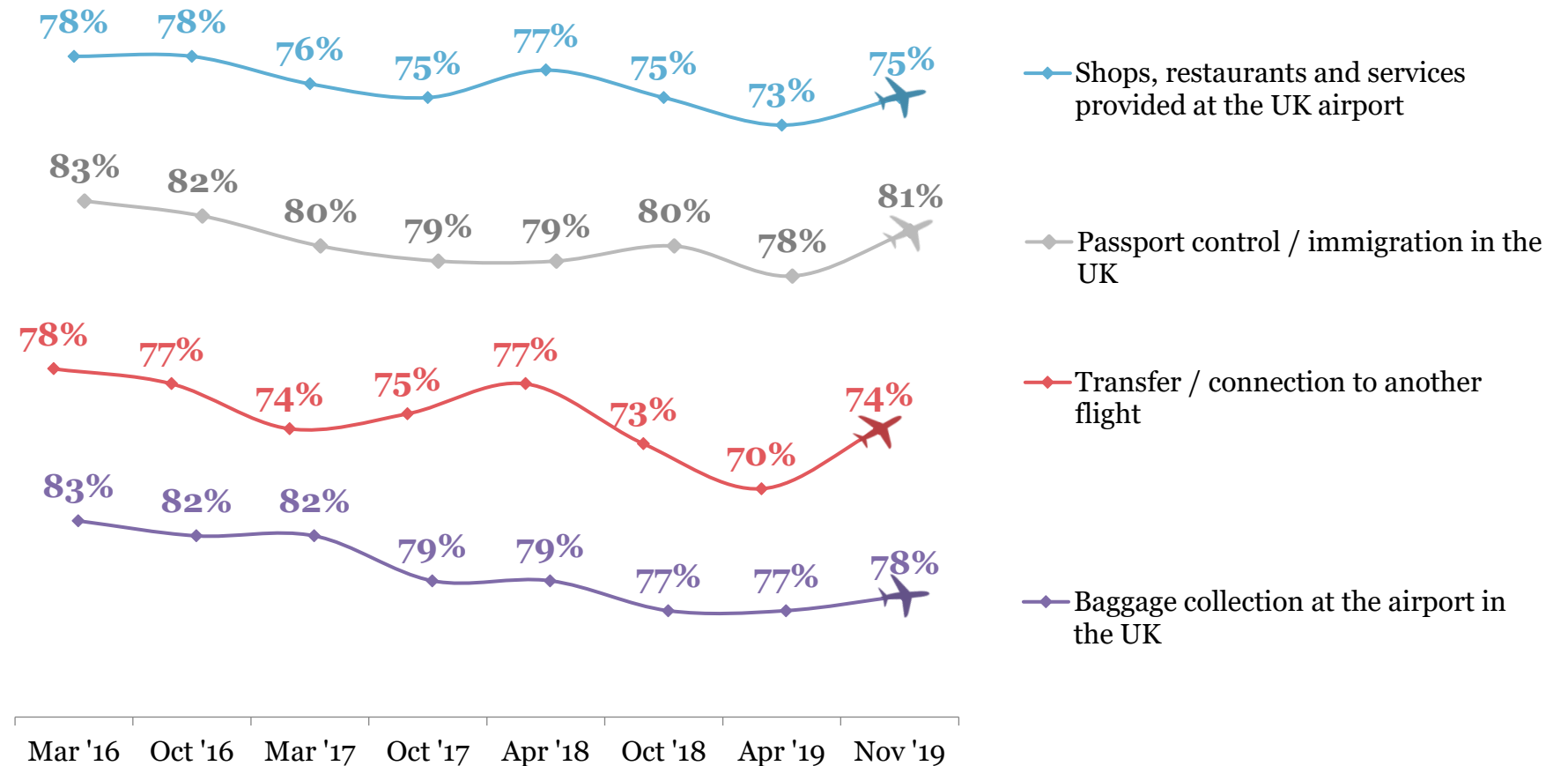


As with other aspects of the journey, satisfaction with transfers and connections to another flight, shops, restaurants and services, and passport control have all increased slightly

Last flight: Satisfaction with airport experience

% Satisfied – Part 2

Levels of satisfaction with passport control / immigration (81%) and with shops, restaurants and services provided at UK airports (75%) have seen a small increase compared to the previous wave of research. This indicates an improvement in the airport industry, however a similar pattern was demonstrated in previous months, which was then followed by a drop in satisfaction, suggesting efforts should be consistently made to improve.



Travel disruption and complaint handling



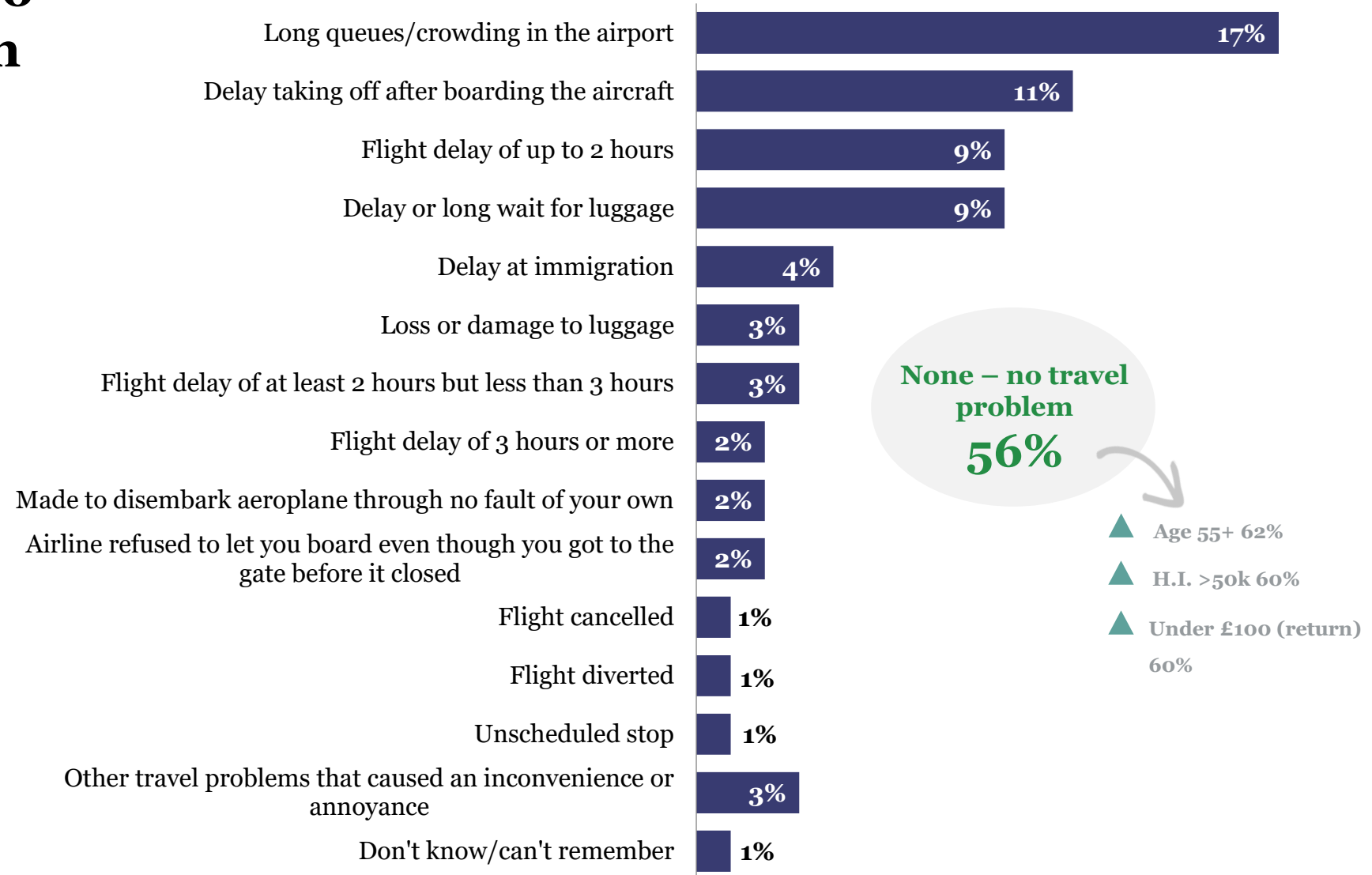
Long queues and crowding continue to be the most common travel issue

Long queues/crowding, delays taking off after boarding and flight delays up to 2 hours make up the top three most common travel issues.

Slightly fewer passengers say they had no travel problems (down from 59% to 56%) than in wave 7. This wave saw three in five of those aged over 55 (62%), with a household income more than £50,000 (60%) and travelling via under £100 return flights (60%) say they had no travel problems.

Experience of recent flight issue(s)

All who have flown in the last 12 months



A majority of passengers who receive information about travel issues are kept up-to-date by their airline

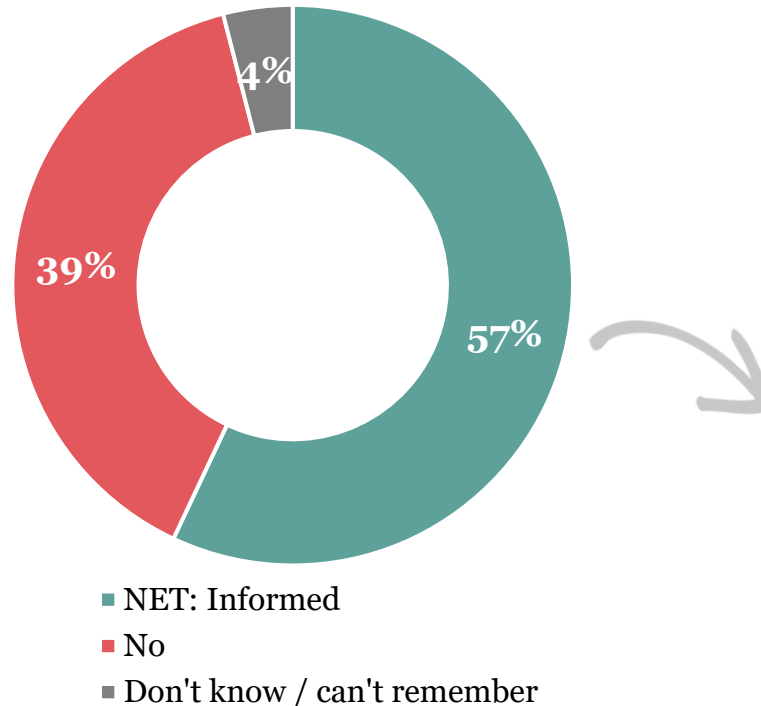
Nearly three in five (57%) of passengers say they received information on the cause of their travel issue when flying in the last 12 months. However, two in five (39%) say they did not receive any information.

Of those who did receive information, just under three in five (57%) say they received this information from the airline, while two in five say they received this information from the airport.

Receiving information on travel issues

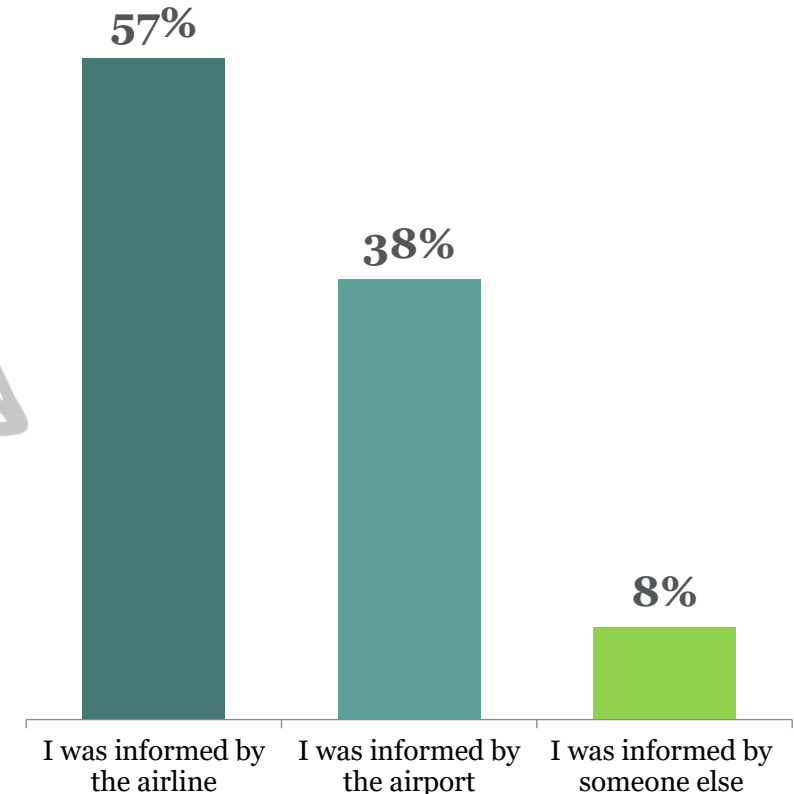
Receiving information on the cause of the issue(s)

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



Source of information

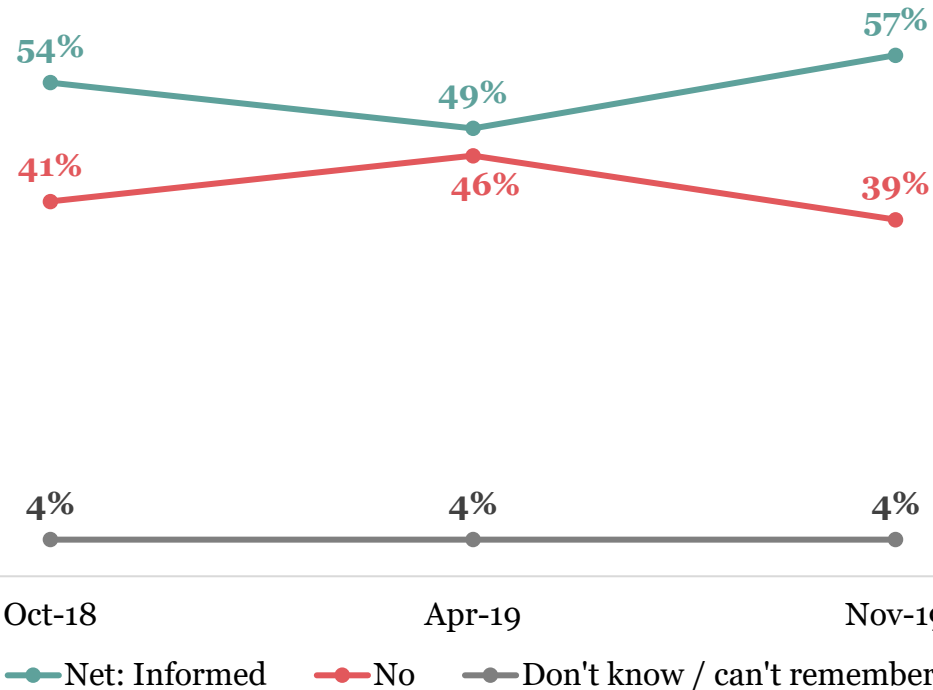
All who have flown in the last 12 months and experienced travel issue(s) and received information



The proportion of passengers who say that they were informed of the cause if their issue has improved since an initial drop in April 2019

Receiving information on the cause of the issue(s)

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

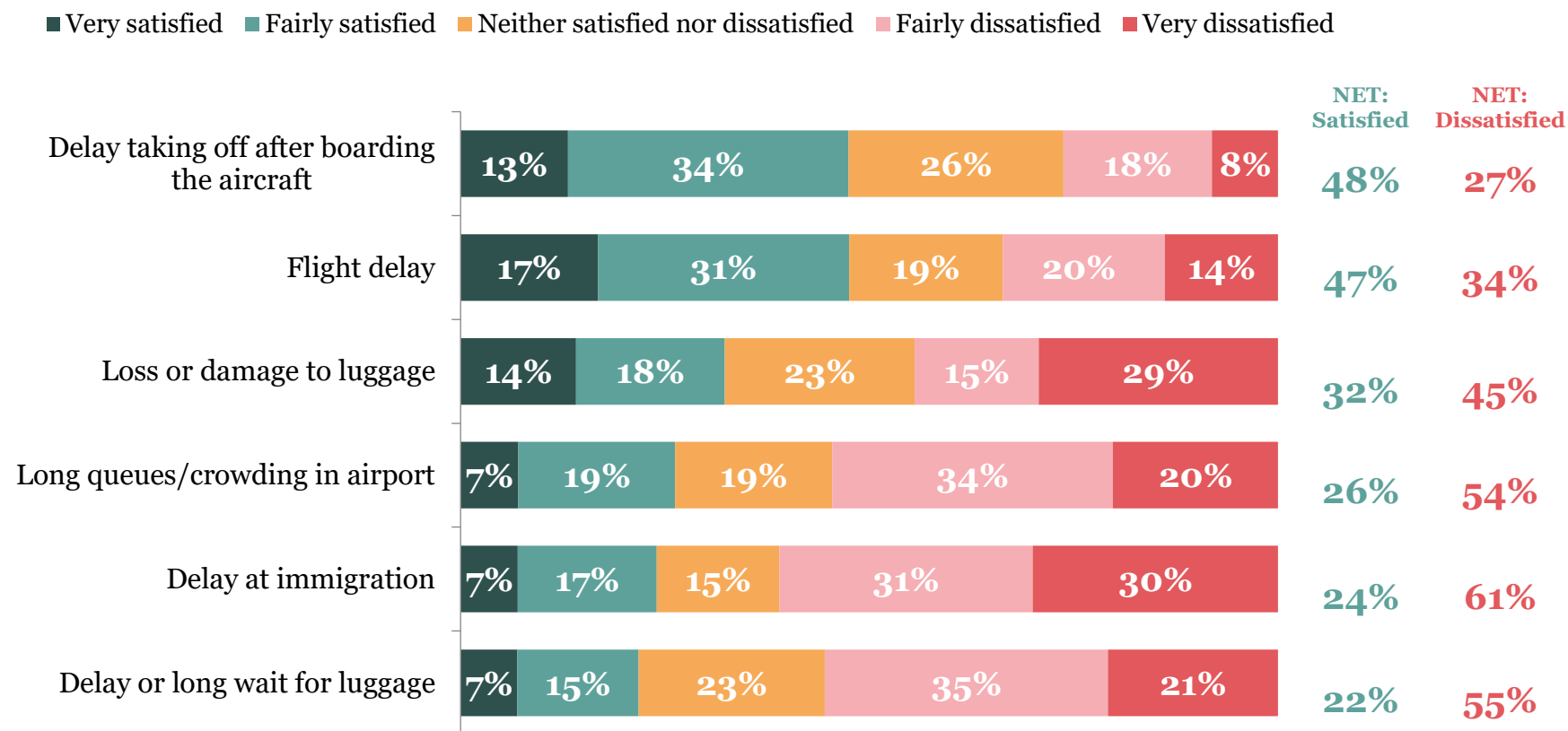


Satisfaction for the resolution of flight delays and delays taking off are higher than in wave 7

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

Just under half (48%) of passengers who had a delay taking off after boarding the aircraft say they were satisfied with how the issue was handled. This is up 5 percentage points from wave 7 (43%), while dissatisfaction has fallen 8 percentage points (35% to 27%). Dissatisfaction with delay or long waits for luggage has dropped 6 percentage points from wave 7 (61% to 55%).



Showing bases n=50+

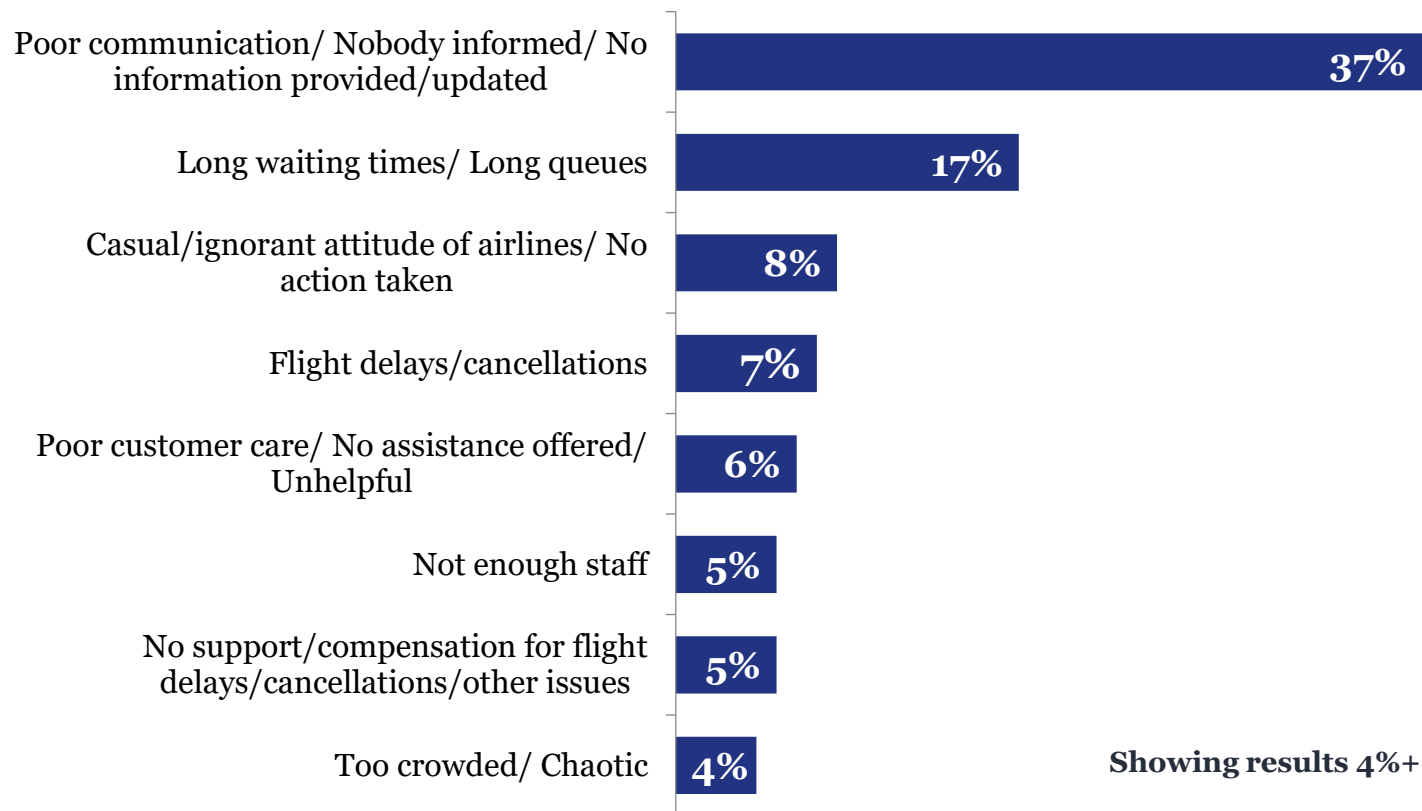
Poor communication and lack of information remains by far the biggest issue of dissatisfaction for passengers

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

Nearly two in five (37%) passengers say that poor communication is the reason for their dissatisfaction when dealing with a travel issue. This remains the top issue, carrying over from wave 7.

The amount who say long waiting times and queues were their cause of dissatisfaction has risen from wave 7 by 3 percentage points.



Showing results 4%+

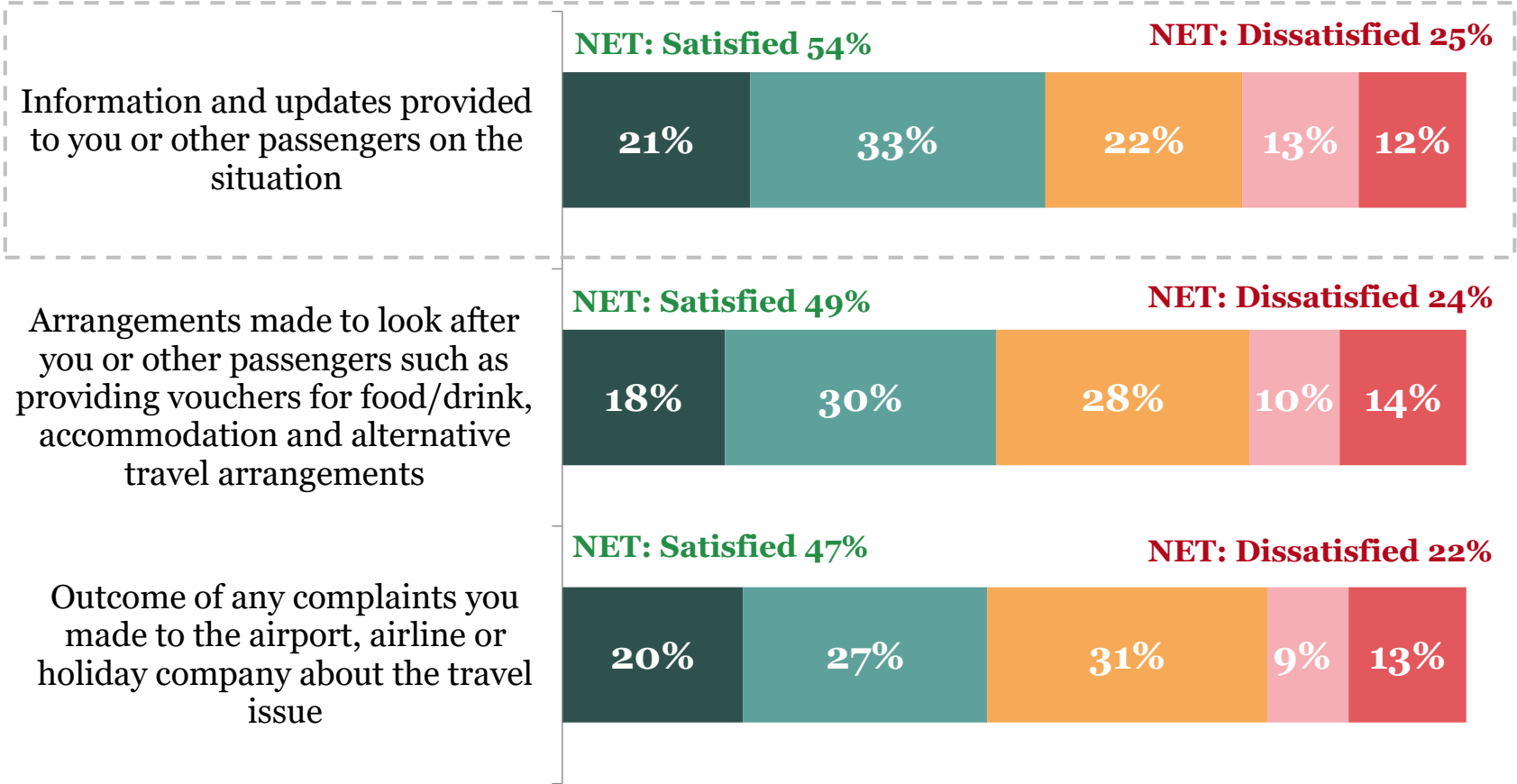
Though improving slightly since wave 7, satisfaction with steps to rectify travel problems remains relatively low

Just over half (54%) of passengers who had travel problems were satisfied with the amount of information provided to resolve the problems. This is 2 percentage points higher than in wave 7, but with a quarter (25%) dissatisfied with the information provided, more work needs to be done. Less than half of customers were satisfied with the arrangements made to look after them (49%) or the outcome of their complaints (47%), though both are slightly up on wave 7's results (48% and 45% respectively).

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

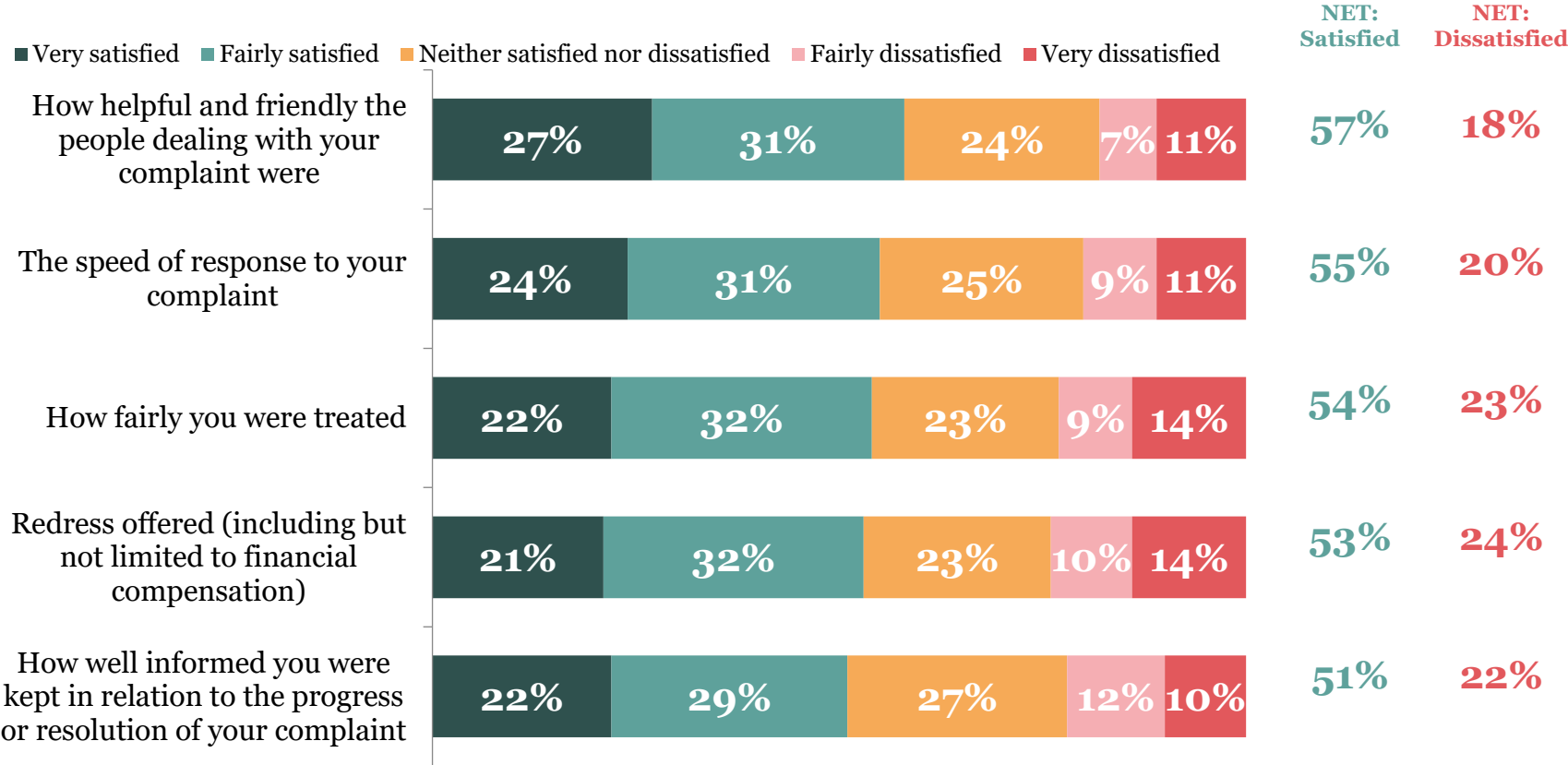


Satisfaction with how complaints were handled improves from wave 7, but is still lower than previous waves.

Satisfaction with how complaints were handled

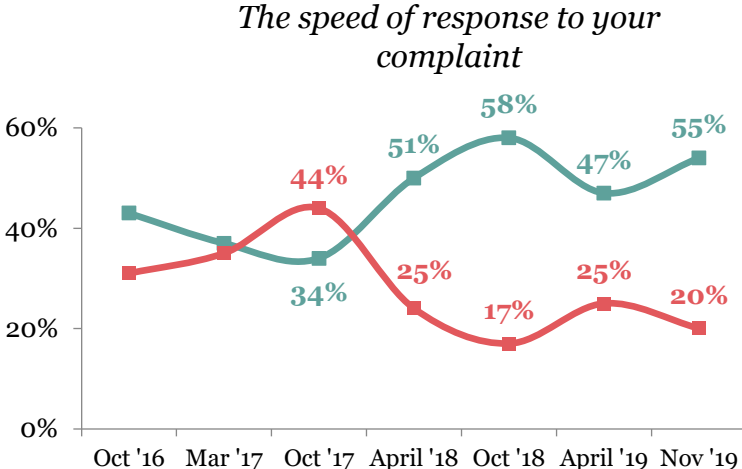
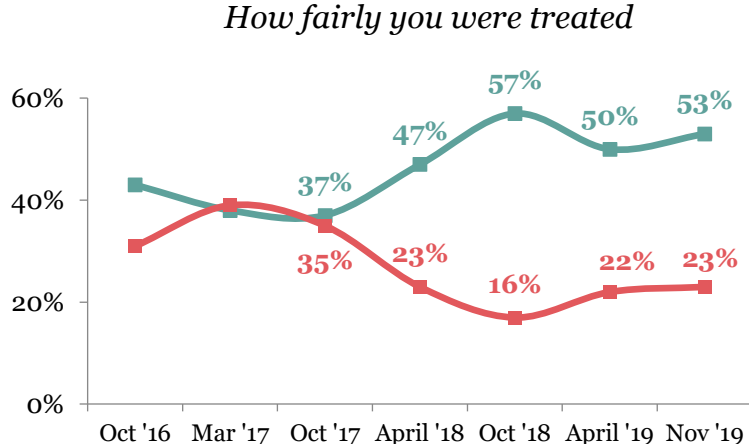
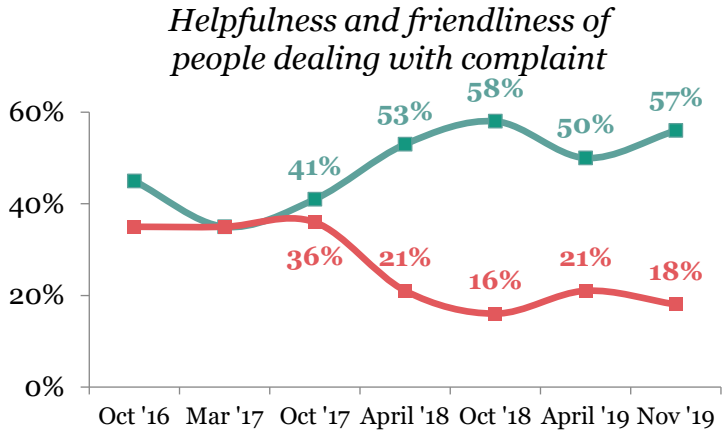
All who have flown in the last 12 months, experienced a travel issue and complained, excluding 'Too early to say' and 'Don't know' responses

In wave 7, satisfaction with how well informed the customer was kept in relation to their complaint had dropped 10 percentage points from 56% to 46%. This wave sees a recovery of 5 percentage points to 51%, though this is ultimately still lower than the recorded figures for wave 6 (56%). Nearly three in five (57%) recall that they were satisfied with how helpful and friendly the people dealing with their complaint was.



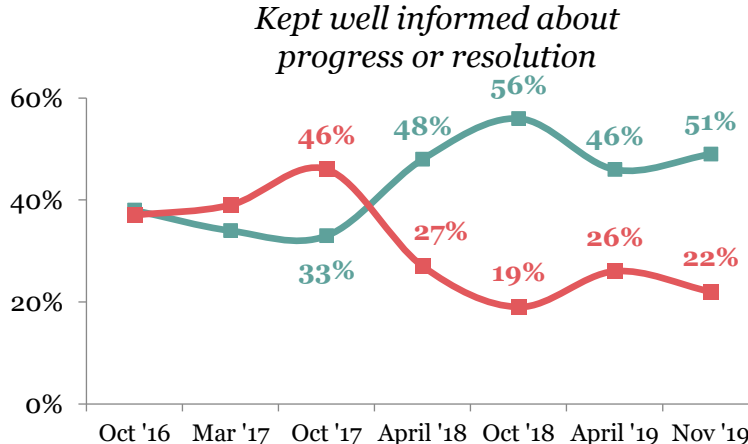
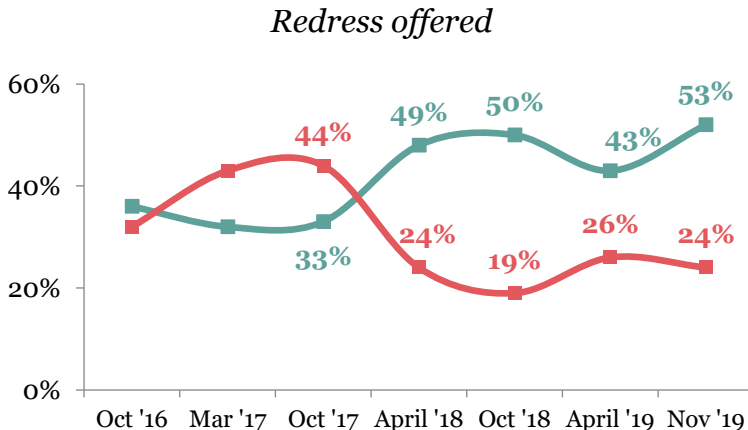
Satisfaction with complaints handling has increased this wave, but in most metrics is still lower than the highs of October 2018

Satisfaction with complaint handling - Tracking



NET: Satisfied — (green line)

NET: Dissatisfied — (red line)



51 Q42. 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=369-391)

Accessibility and the experience of disabled passengers

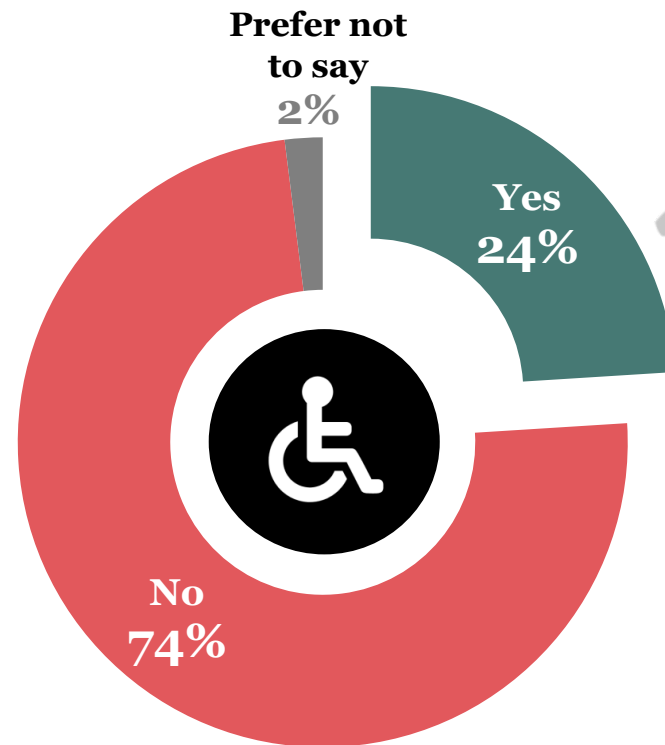


Over half of people flying with a disability or health condition find difficulty in accessing and using airports or flying

The proportion of passengers who have a disability and say they have difficulty in accessing/using airports or flying has remained relatively unchanged since wave 7, with both wave 7 and wave 8 showing 56% who say they do have difficulties.

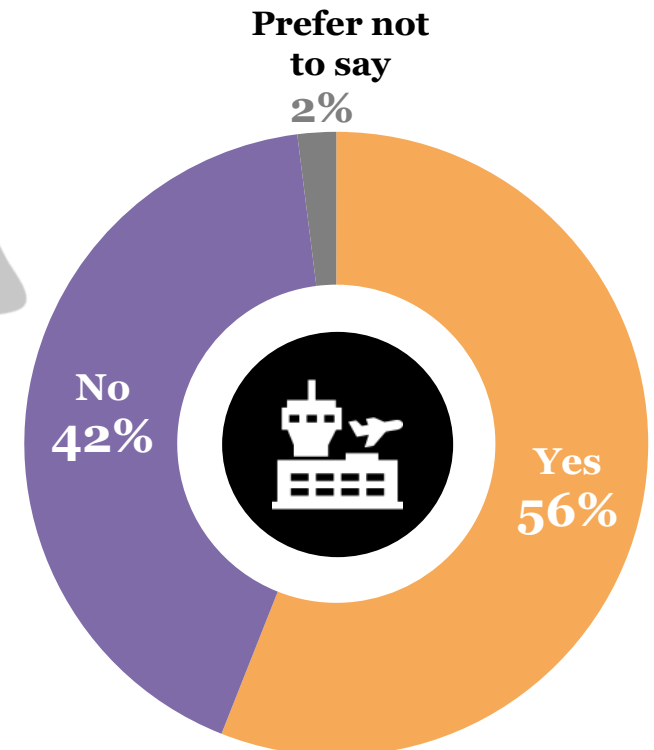
Disability/health condition

% who have a disability



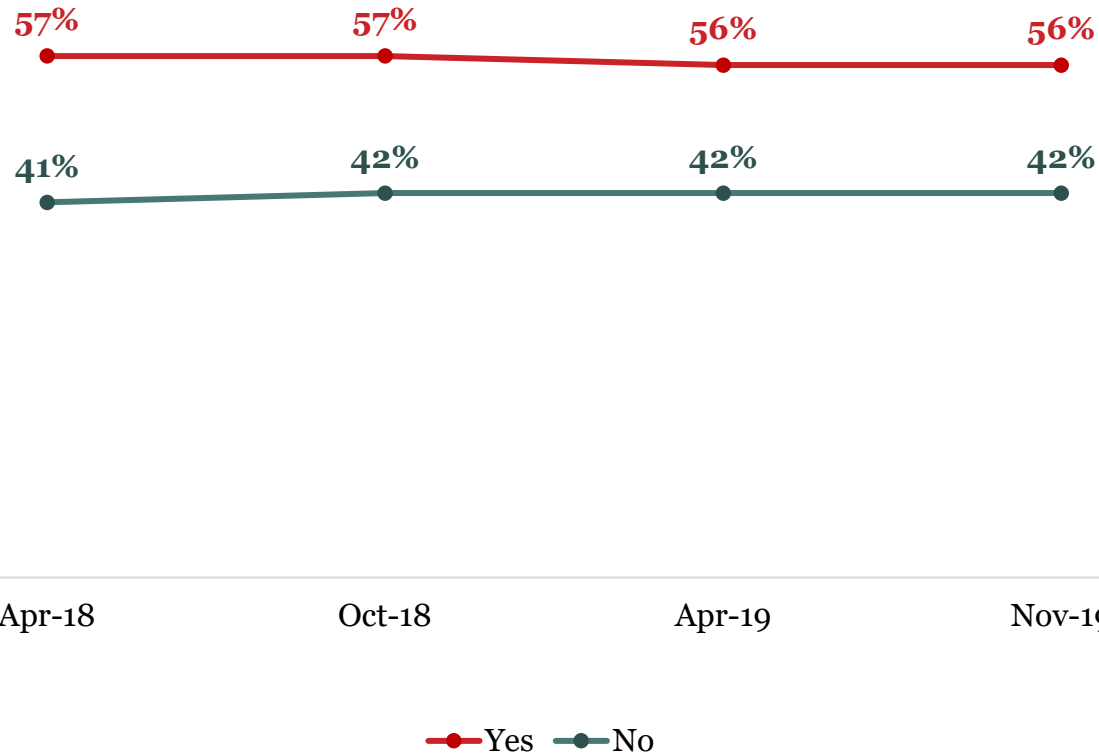
Difficulty in accessing/using airports or flying

All who have a disability



Difficulty in accessing airports has remained consistent over time

Accessibility of airports
Showing tracking since April 2018



The proportion of respondents with a disability who say their disability makes accessing and/or using airports or flying difficult has remained consistent since April 2018. More than half of respondents have said this since April 2018 (April 2018 57%; October 2018 57%; April 2019 56%; November 2019 56%).

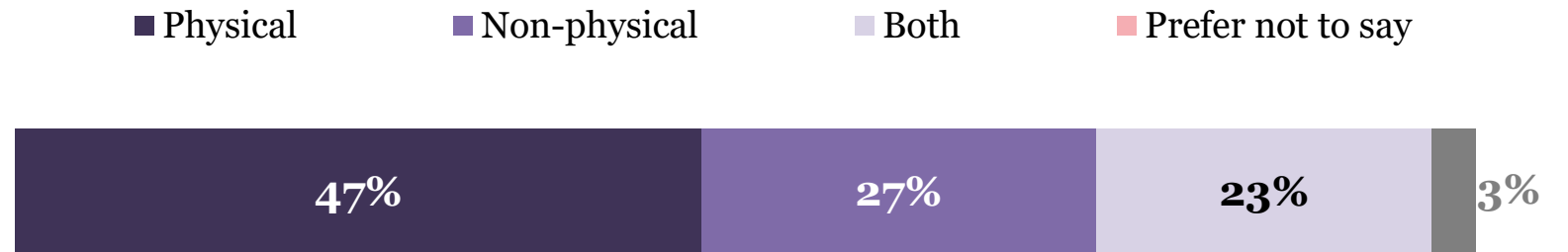
Half of passengers with disabilities say that their disability is hidden

Nearly half (47%) of passengers with a disability say that their disability is a physical one, compared to a quarter (27%) who say that it is a non-physical disability.

Three quarters (76%) of respondents say that their disability is either hidden or both hidden and non-hidden, meaning that many disabilities may not be easily recognisable at first.

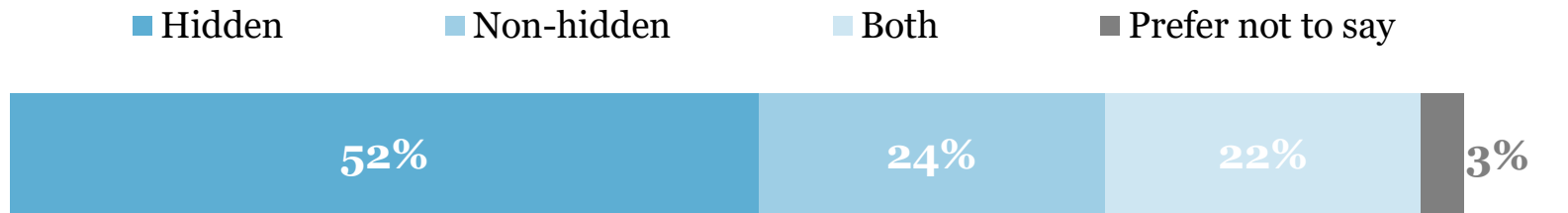
Physical or non-physical disability

All who have a disability (online only)



Hidden or non-hidden disability

All who have a disability (online only)



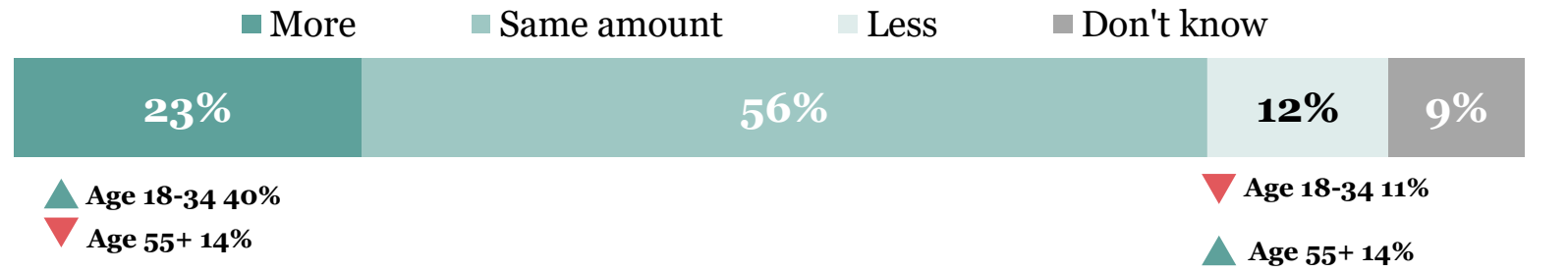
0% 20% 40% 60% 80% 100%

Only a quarter of disabled passengers expect to fly more in the next 12 months

The majority of disabled adults do not expect their flying frequency to change much, with 56% saying that they expect the same amount of flying as the past 12 months. Over two thirds of disabled adults (68%) say that their disability means that they would need assistance from the airline or airport when making a flight. This is up 6% from wave 7 (62%).

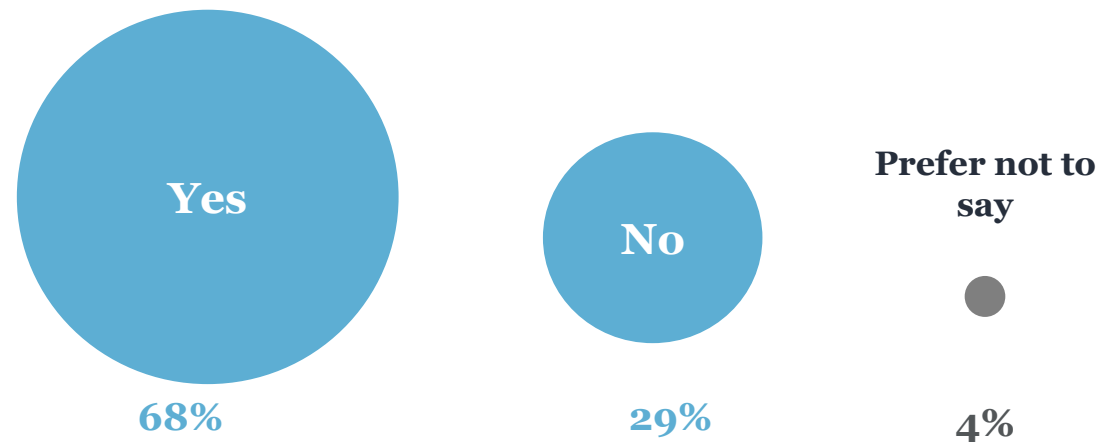
Expected flying behaviour (frequency) in next 12 months, as compared to previous year

All who have a disability



Assistance required

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



56 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=821)
 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=460)

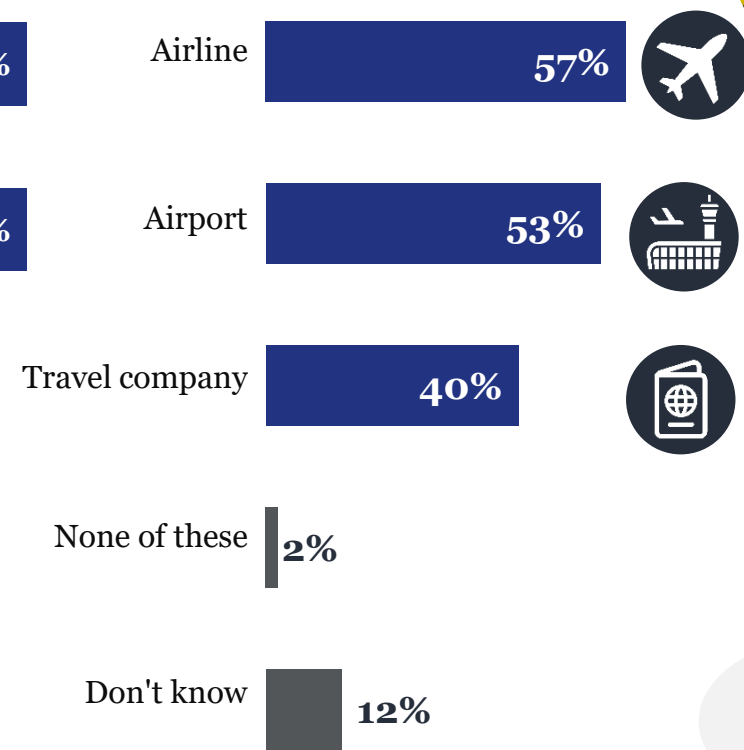
There is a high level of awareness of special disability assistance among disabled UK adults, though few are aware of the full details



Awareness of special assistance



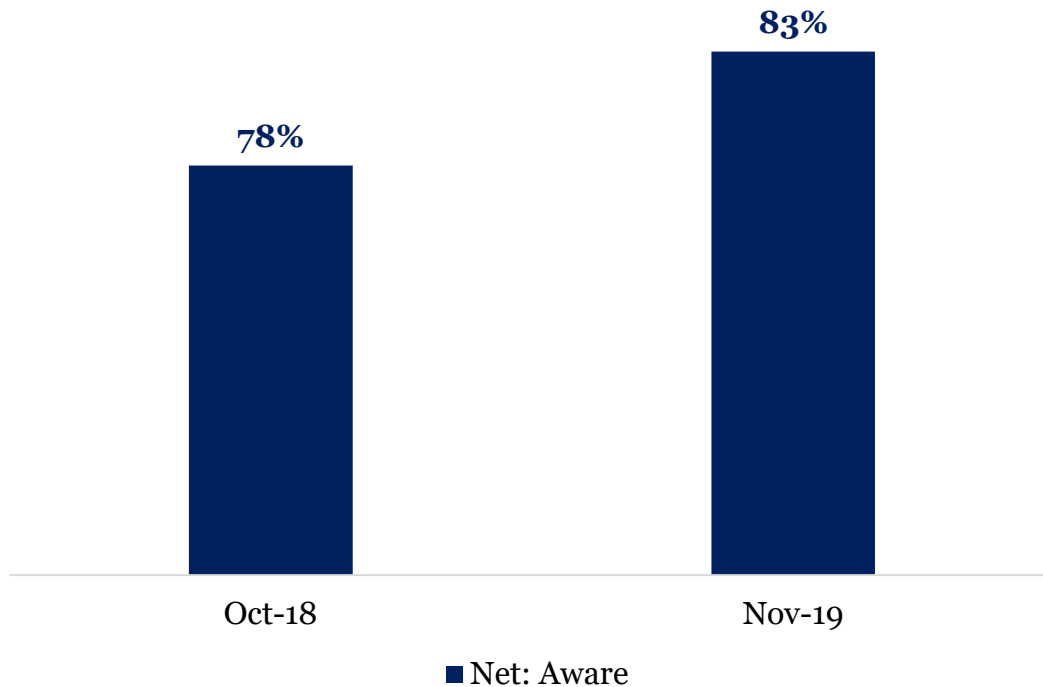
Knowledge of who to inform



Net: Aware 83%

Awareness of entitlement to special assistance when travelling by air has risen in the last year

Disabled passengers' net awareness about the availability of special assistance when travelling by air
(Showing tracking since Oct 2018)



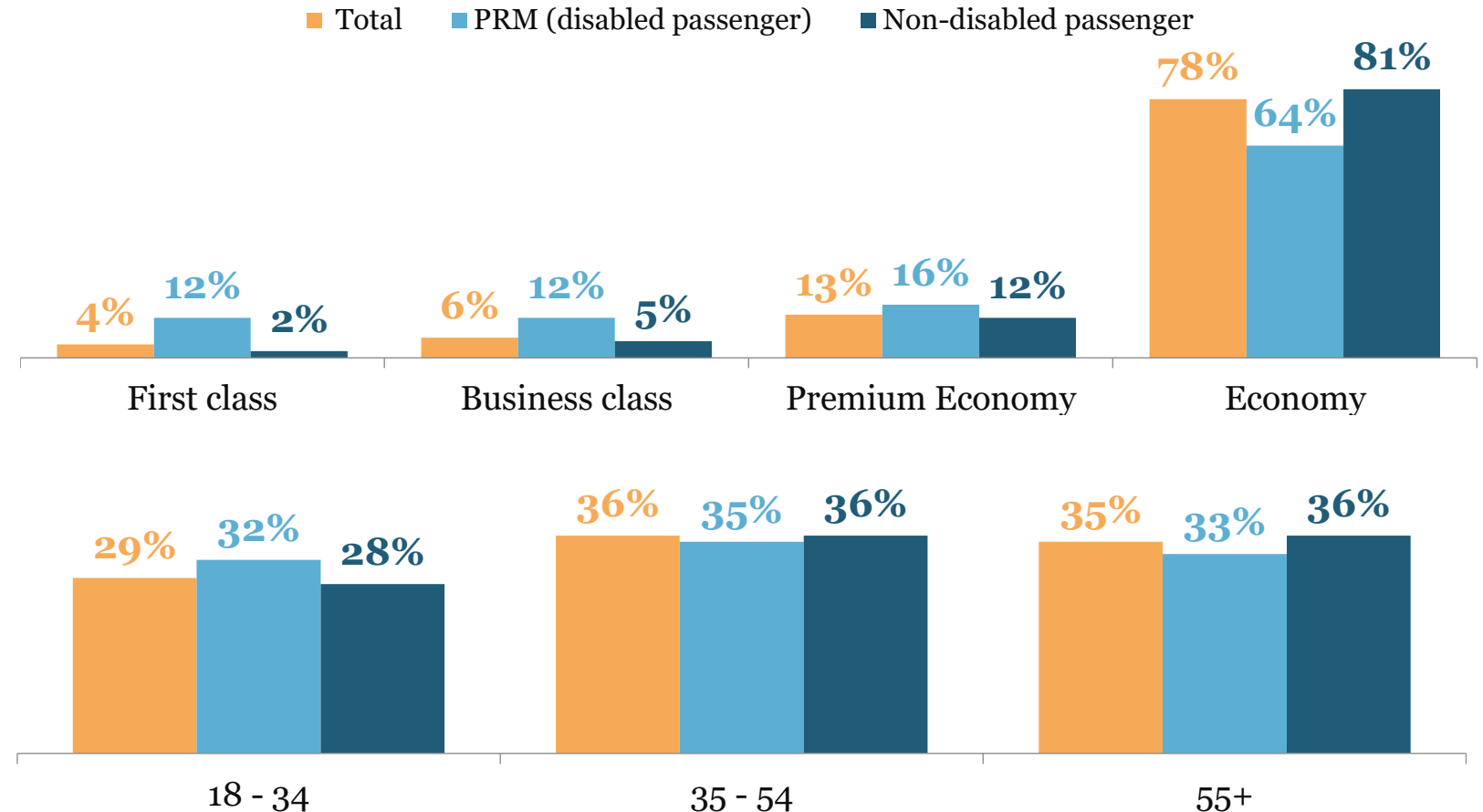
+5%

Disabled passenger awareness about assistance has risen 5 percentage points from 78% in October 2018 to 83% in November 2019.

Disabled passengers are more likely than average to travel first or business class, but most travel economy

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

Disabled people are more likely to travel first class than non-disabled passengers (12% vs 2% respectively) and twice as likely to travel business class (12% vs 5% respectively).

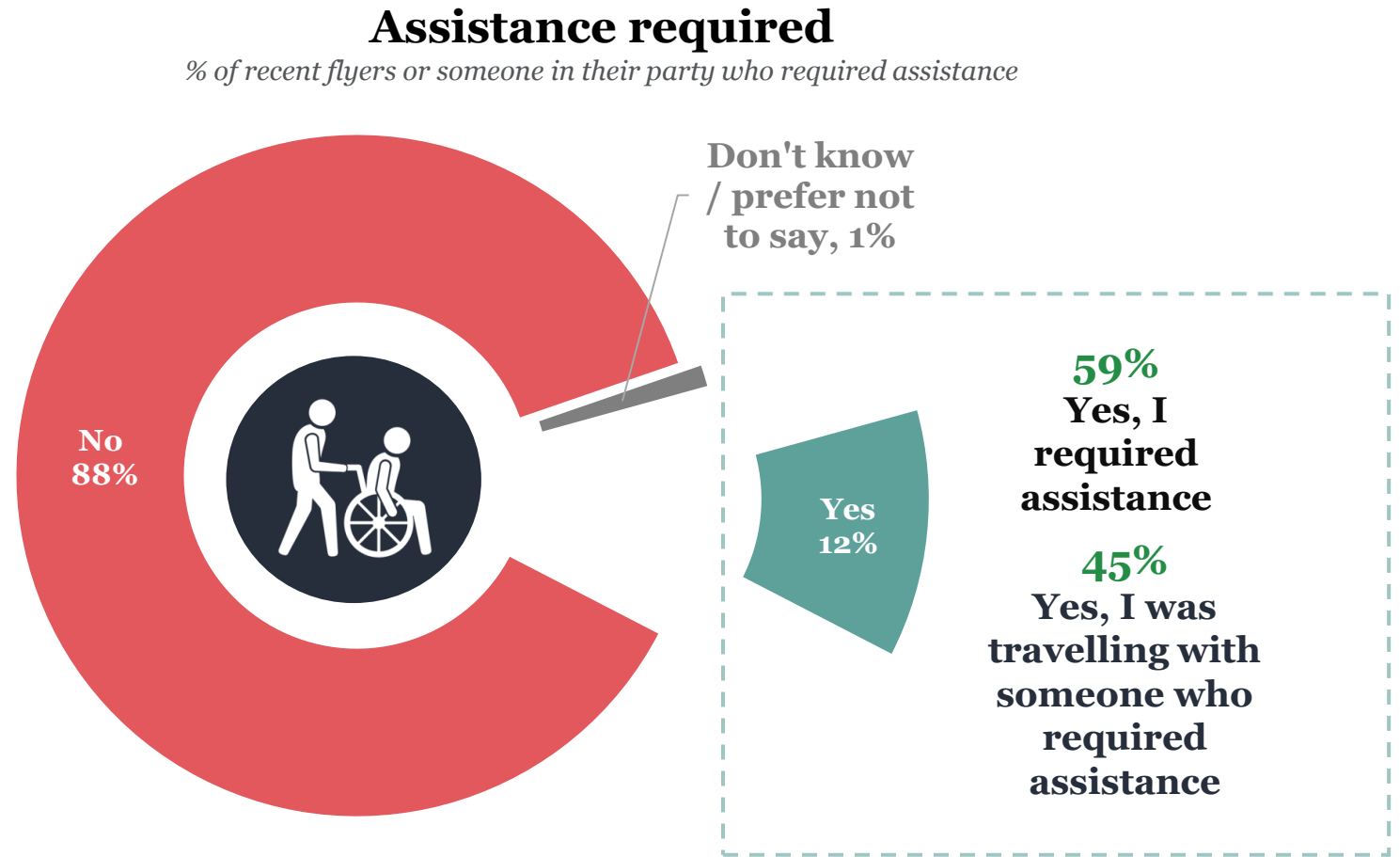


QD2. Age Base: All respondents (n=3501) Respondents with a disability (n=821)

59 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=1994) All who have flown in the last 12 months and have a disability (n=331) All who have flown in the last 12 months and don't have a disability (n=1647)

Nine in ten recent flyers did not require special assistance on their most recent flight

Though the majority (88%) of flyers did not need any special assistance, of those where assistance was needed, three in five (59%) needed assistance for themselves, while 45% needed assistance for someone they were travelling with.

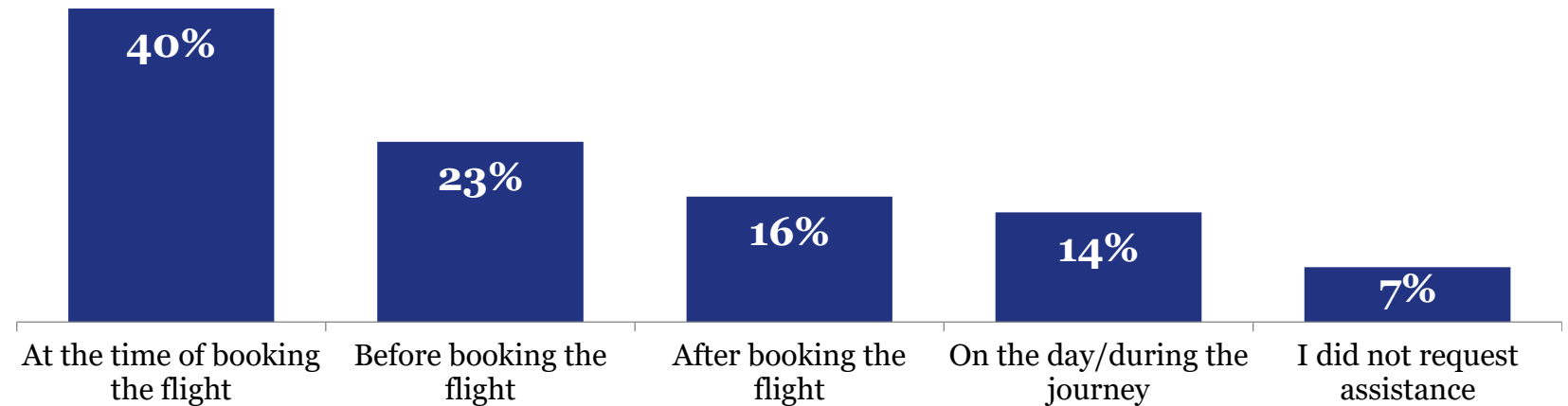


The point where the flight was being booked is the most likely time where assistance was requested

The proportion of respondents who say they needed assistance at the time of booking remains the highest point of need and has increased slightly since the previous wave from 38% to 40%.

Point during booking process when assistance was requested

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

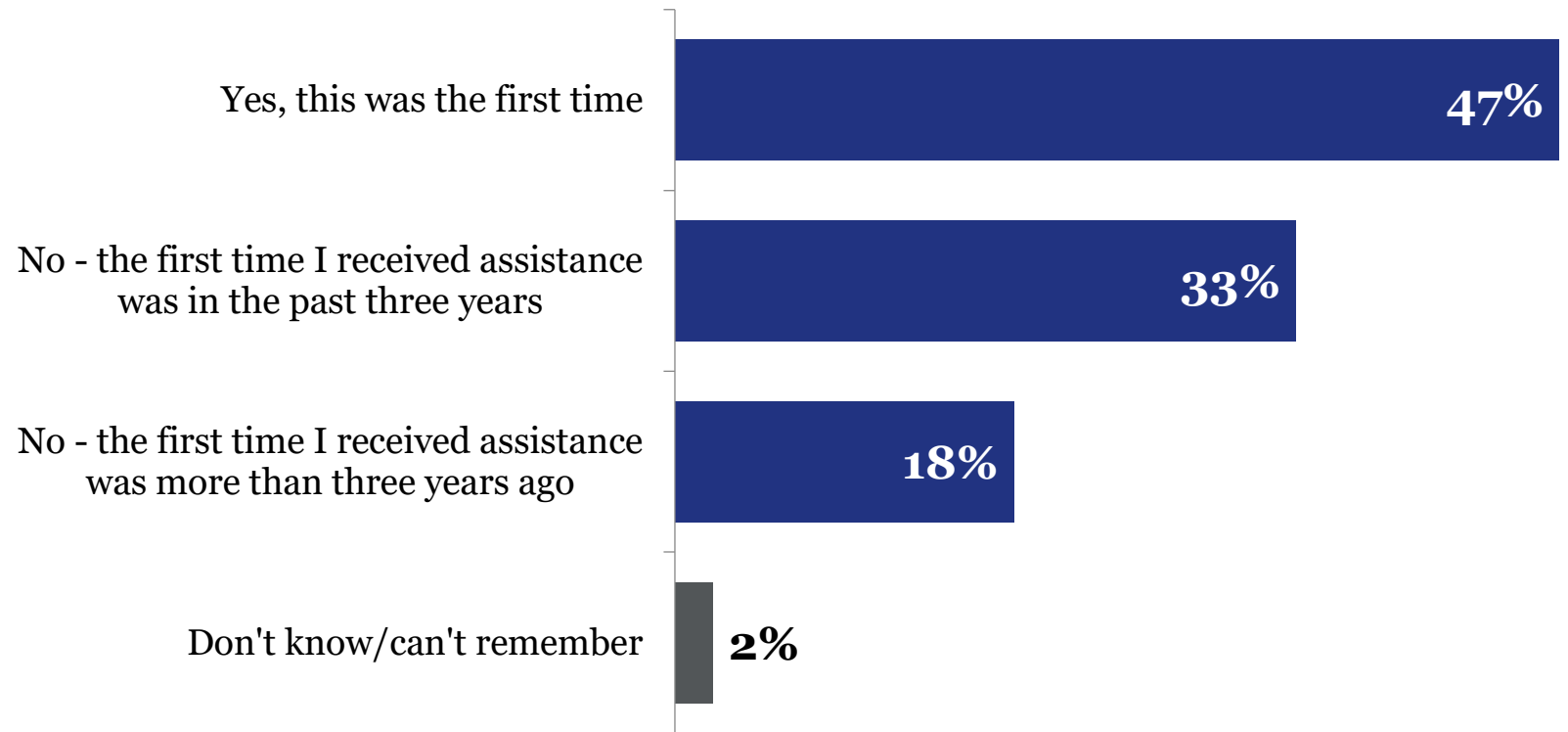


For nearly half of those who had flown and needed assistance, their recent flight was the first time that they had requested assistance

Just under half (47%) of those who had flown from a UK airport and needed assistance said that that experience was their first time. A further third (33%) say that they had received assistance for the first time in the last three years, while one in five (18%) say they received assistance for the first time more than three years ago.

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



One fifth of those for whom this was the first time they had requested assistance said that they were not previously aware that it was available

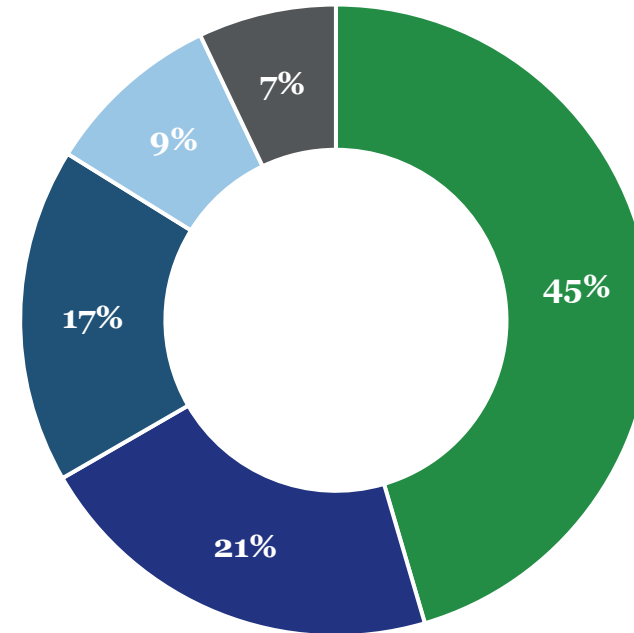
One fifth (21%) said that they would have requested special disability assistance for previous journeys, however they did not know it was available at the time. This shows that lack of information is a common barrier preventing passengers with a disability from getting the support that they need.

One in ten (9%) claim that this was the first time they felt able of confident enough to request assistance. This could be down to a number of reasons, such as the request process being daunting or inaccessible, or that the individuals' conditions had worsened since their previous journey.

A majority (62%) say that this was the first time they had needed assistance either by being the first time they had flown or had flown before but that this was the first time they had requested assistance.

Reason this was first time requesting assistance

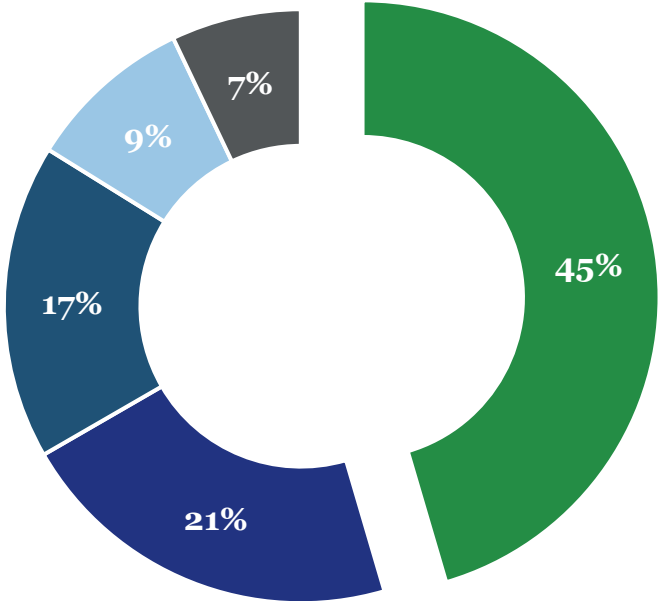
% saying the following



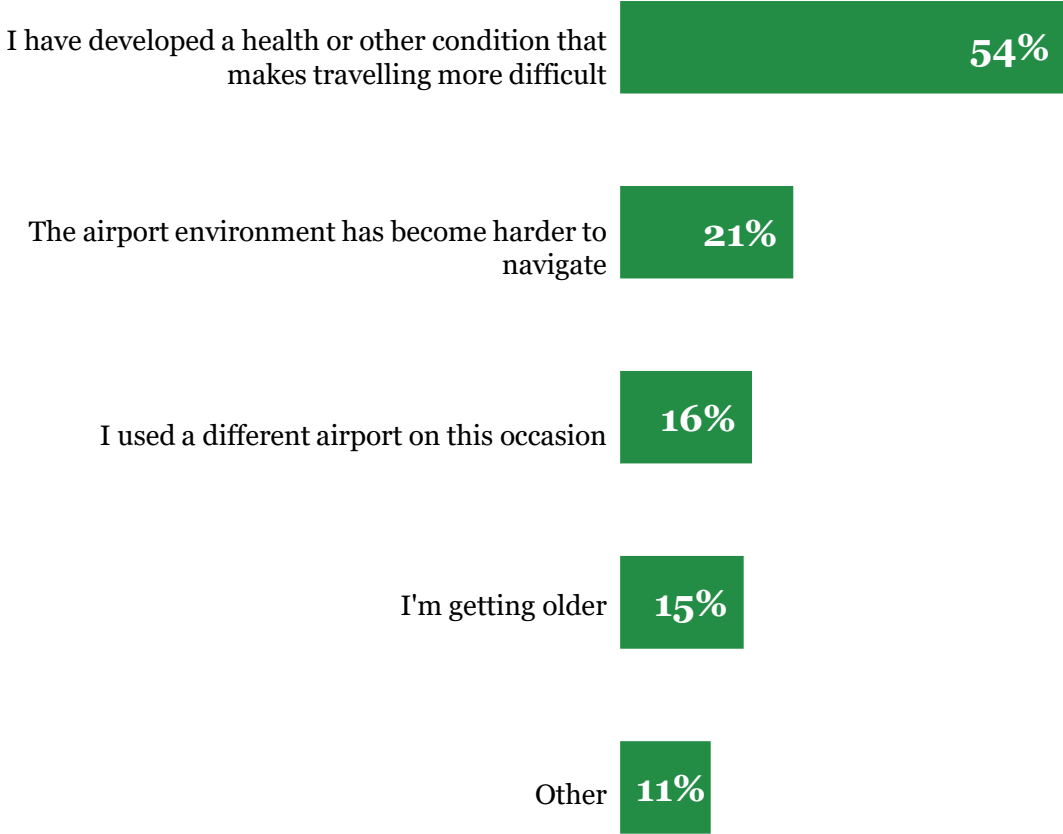
- It was the first time I needed assistance, but I had flown before
- I would have requested assistance before but I did not know it was available at the time
- It was the first time I had flown
- This was the first time I felt able or confident enough to request it
- Other

Among those who have requested assistance for the first time, the majority have only just developed a health condition that makes travel difficult

Why was this the first time using assistance?



- It was the first time I needed assistance, but I had flown before
- I would have requested assistance before but I did not know it was available at the time
- It was the first time I had flown
- This was the first time I felt able or confident enough to request it
- Other



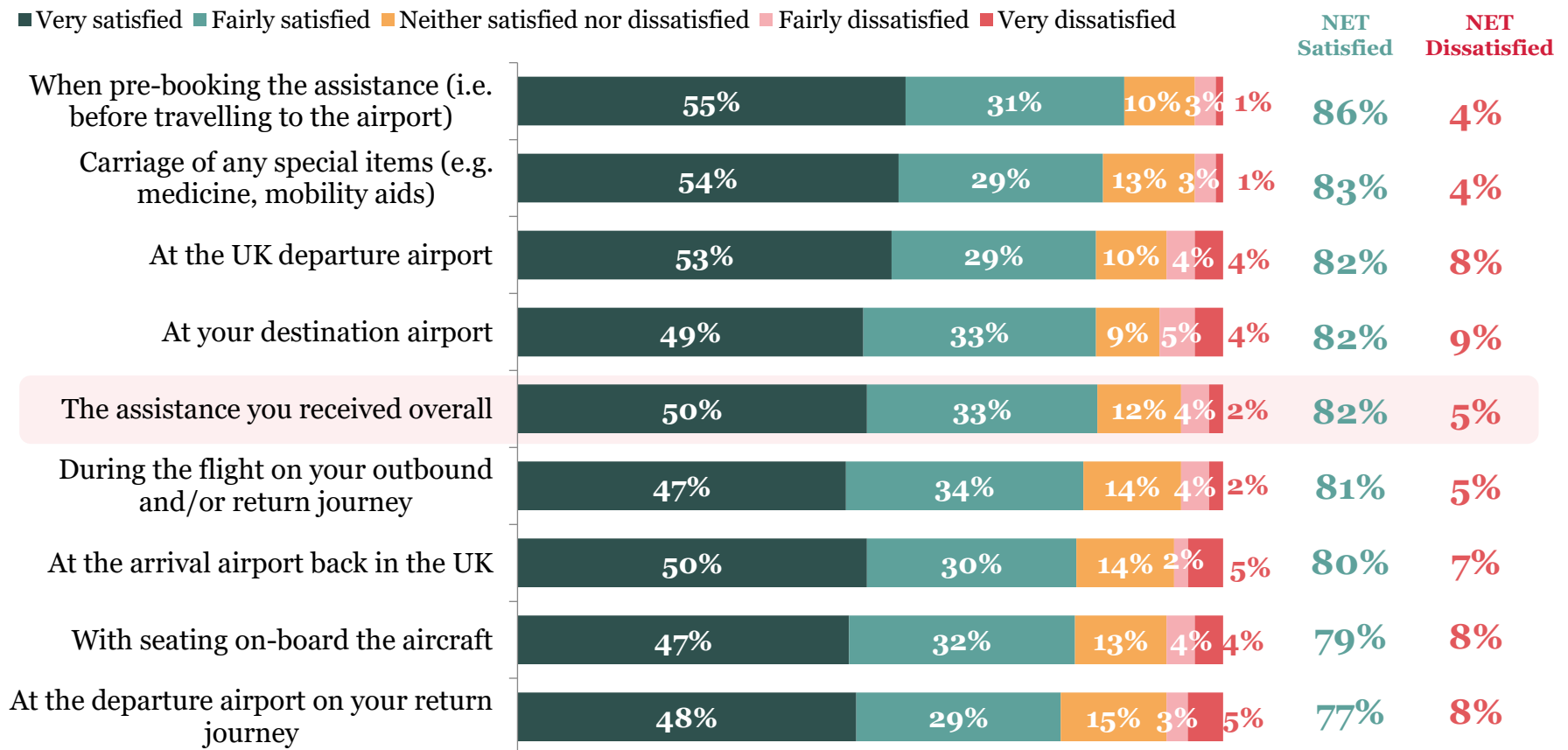
Q33. Base: All those who have flown in the last 12 months and previously received assistance for the first time in the last three years excluding DK/prefer not to say (n=168)
 Q34. Which of the following best describes why you needed assistance when you flew on this occasion, but had not previously needed it? Base: All those who have flown in the last 12 months and previously received assistance for the first time in the last three years, and this was the first time assistance needed excluding DK/prefer not to say (n=76)

When assistance was received, satisfaction for the different elements is generally to a high standard, returning to levels perceived in wave 6.

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

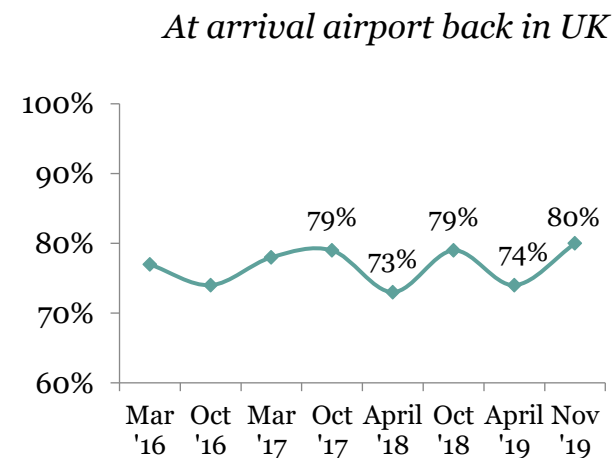
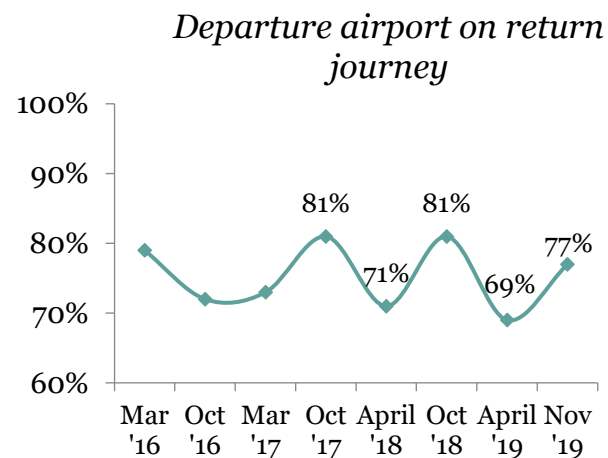
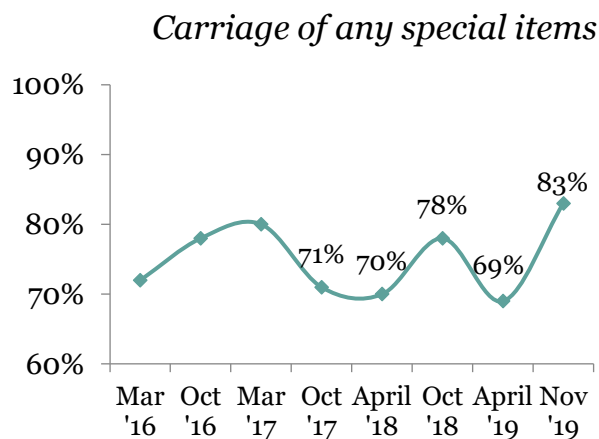
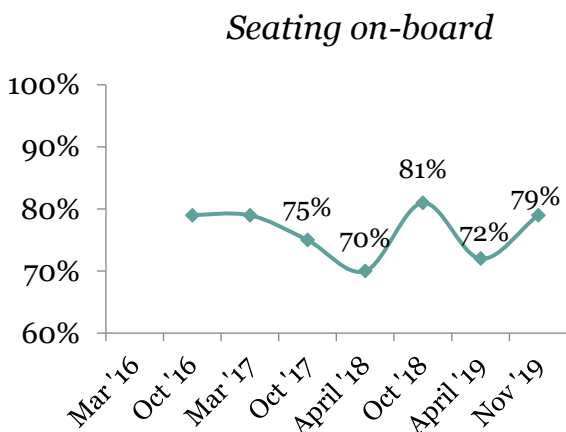
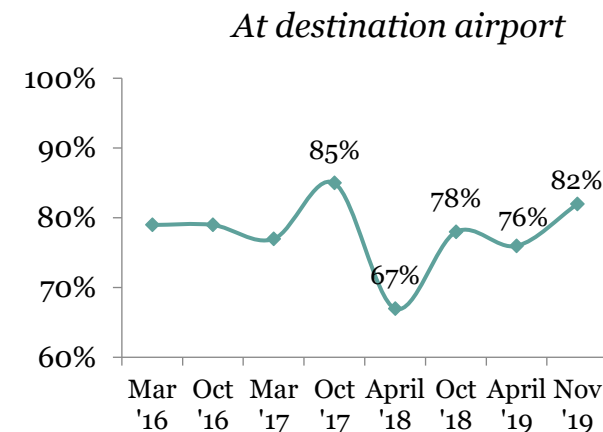
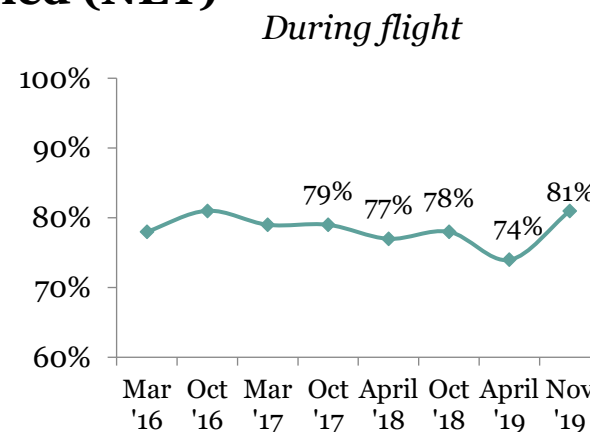
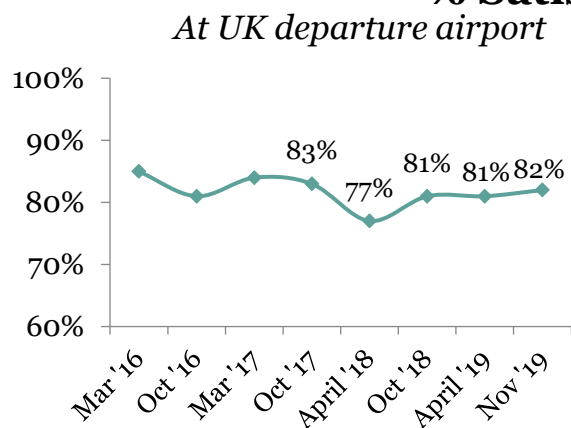
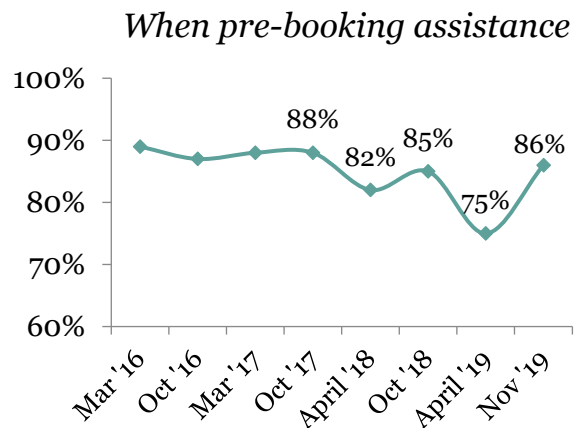
Recent flyers have excellent satisfaction scores and low dissatisfaction for a variety of elements in their flight experience, where assistance has been needed, with 86% being satisfied when pre-booking assistance and 83% satisfied with carriage of special items.



Satisfaction levels have increased across the board compared to the previous wave; this is particularly noticeable regarding pre-booking assistance and carriage of special items

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

% Satisfied (NET)

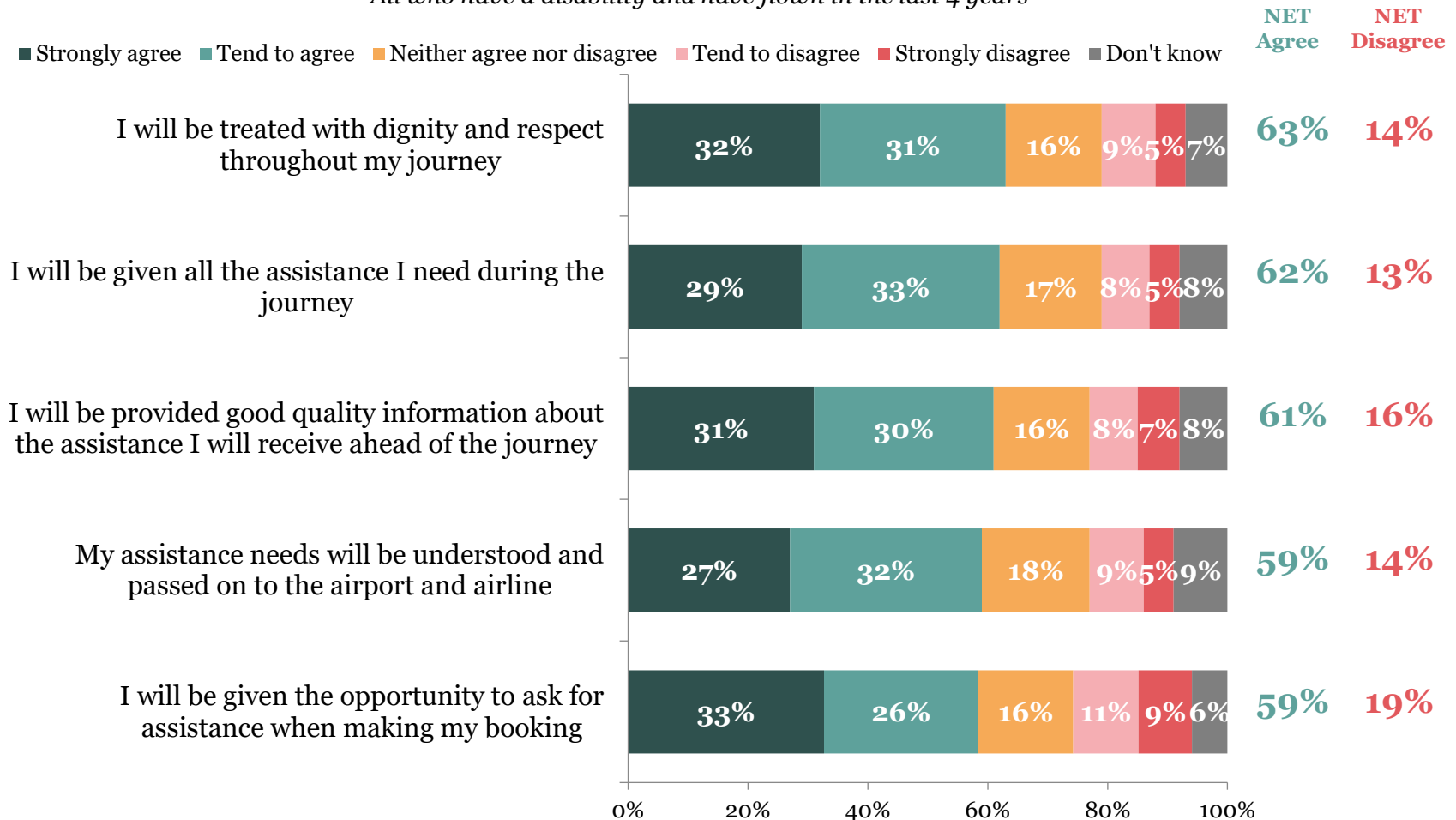


A majority of disabled passengers have positive expectations of how their flying needs will be dealt with

Across the different expectations tested, three in five (59%-63%) disabled passengers agree positively. 63% agree that they will be treated with dignity and respect, while 62% agree that they will be given all the assistance they will need. However, there is a notable majority who disagree in each case (at least 13%), and one in five (19%) disabled passengers disagree with the statement that they will be given the opportunity to ask for assistance when making their booking.

Expectations among PRMs for service when flying

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



Flight Booking

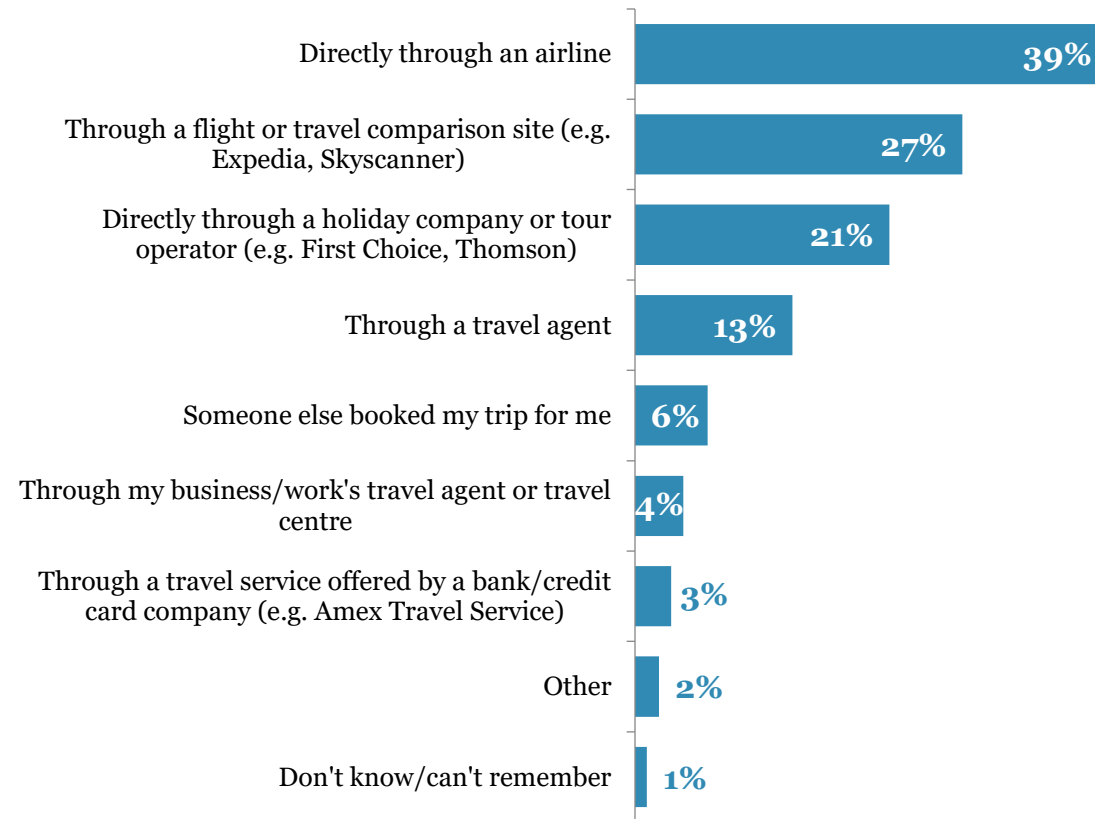


The most common source of information on booking flights is directly through an airline

Two in five (39%) of those who have flown in the last 12 months find information when researching which flight to book directly through an airline.

Following this, over a quarter (27%) of recent flyers find their information through a flight comparison site such as Expedia or Skyscanner, while one in five (21%) find their information through a holiday company or tour operator.

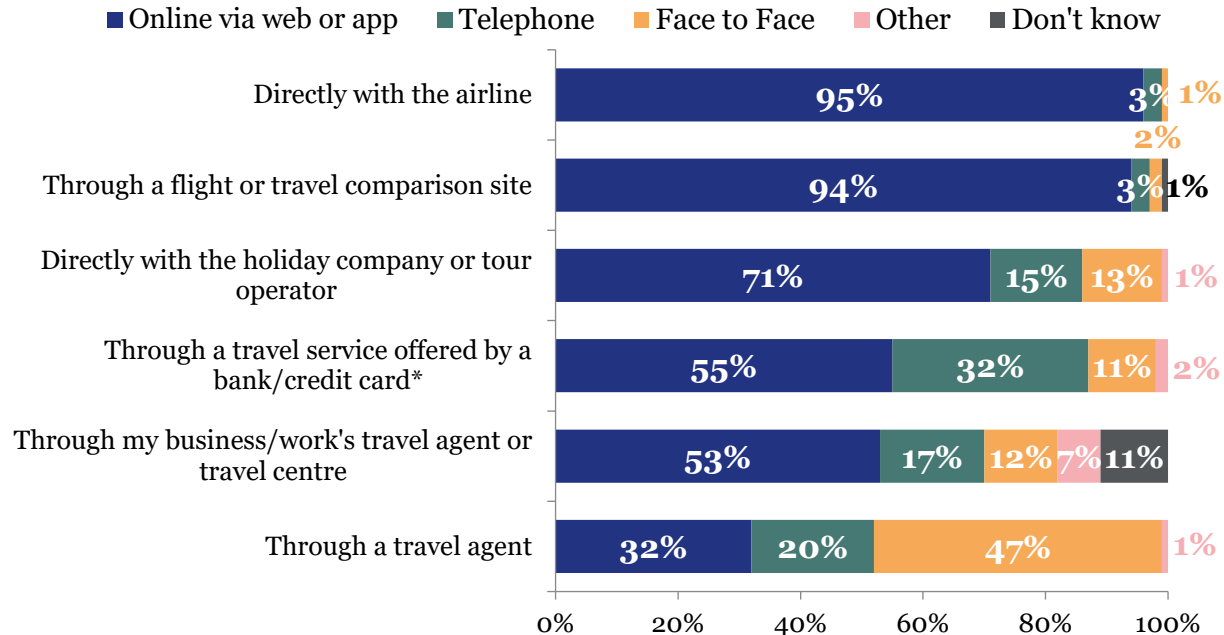
Source of information on booking flights



Nearly all bookings with an airline were completed online via website or an app

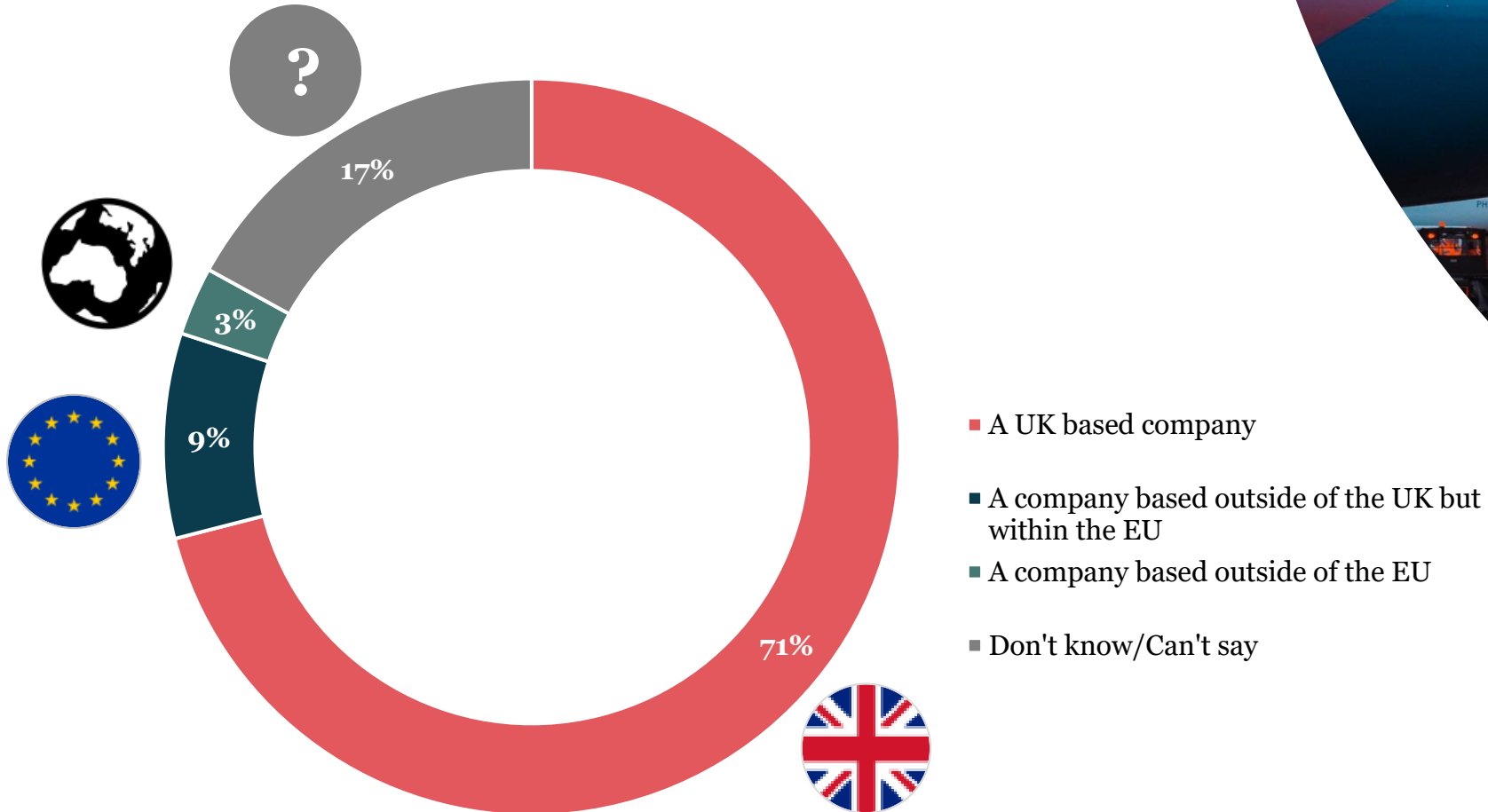
How was this most recent flight booked?

By method used



For bookings directly with the airline, 95% of recent flights booked were done online via website or app. Face to face bookings were most prevalent where the booking was made through a travel agent with nearly half (47%) using this method. A third of those who booked through a travel service offered by a bank or credit card did so via telephone.

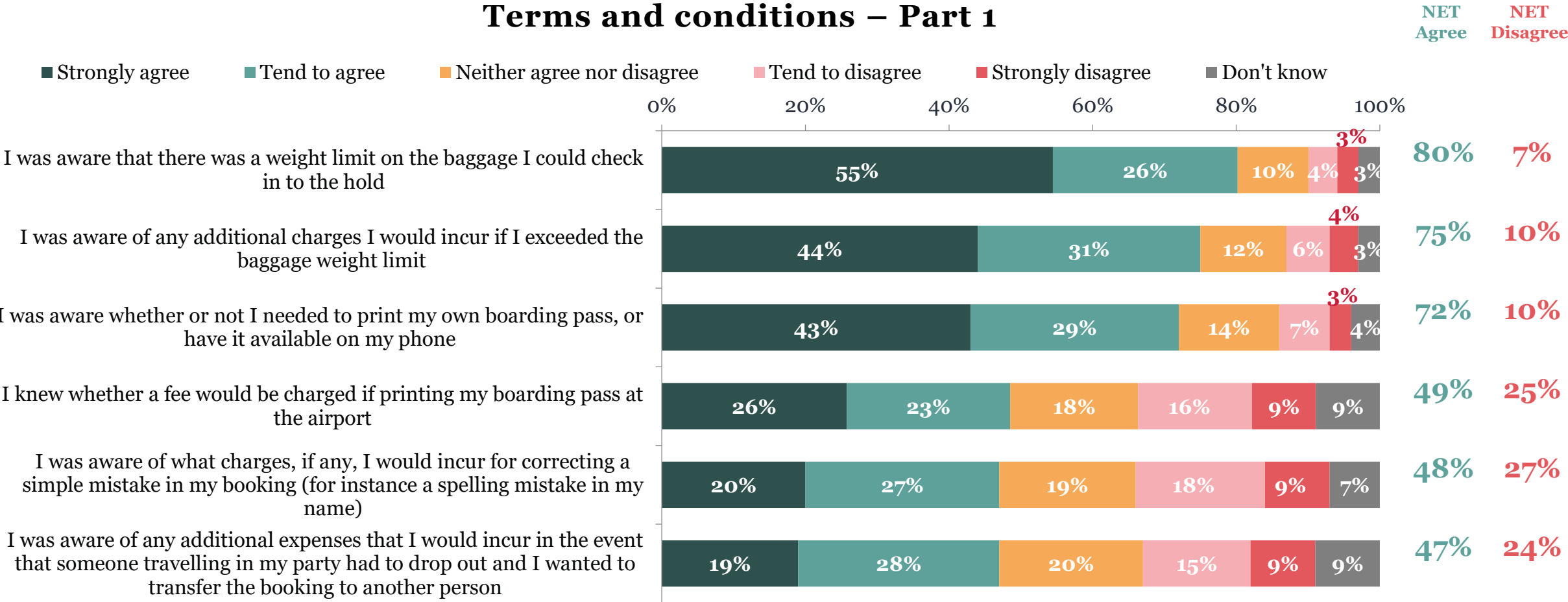
The majority of flights booked by those who have flown in the last 12 months are booked with a UK based company



- A UK based company
- A company based outside of the UK but within the EU
- A company based outside of the EU
- Don't know/Can't say

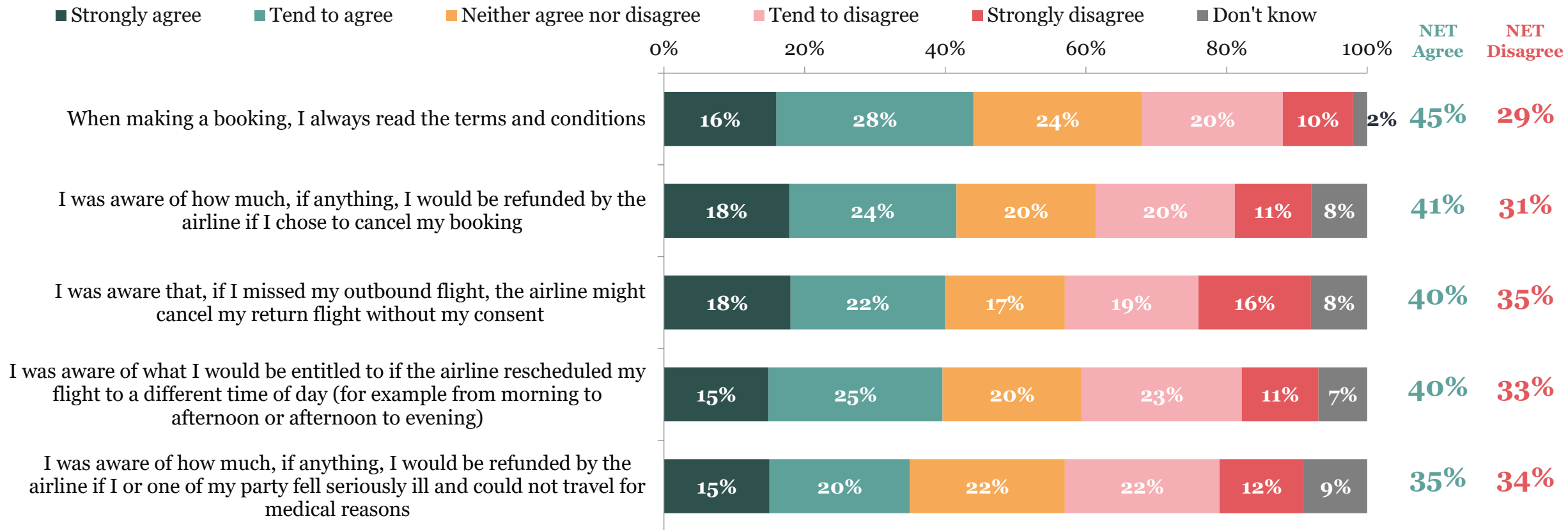
A quarter of passengers were unaware of whether they would incur a fee for printing a boarding pass at the airport, correcting a spelling mistake or changing a passenger on their booking

Terms and conditions – Part 1

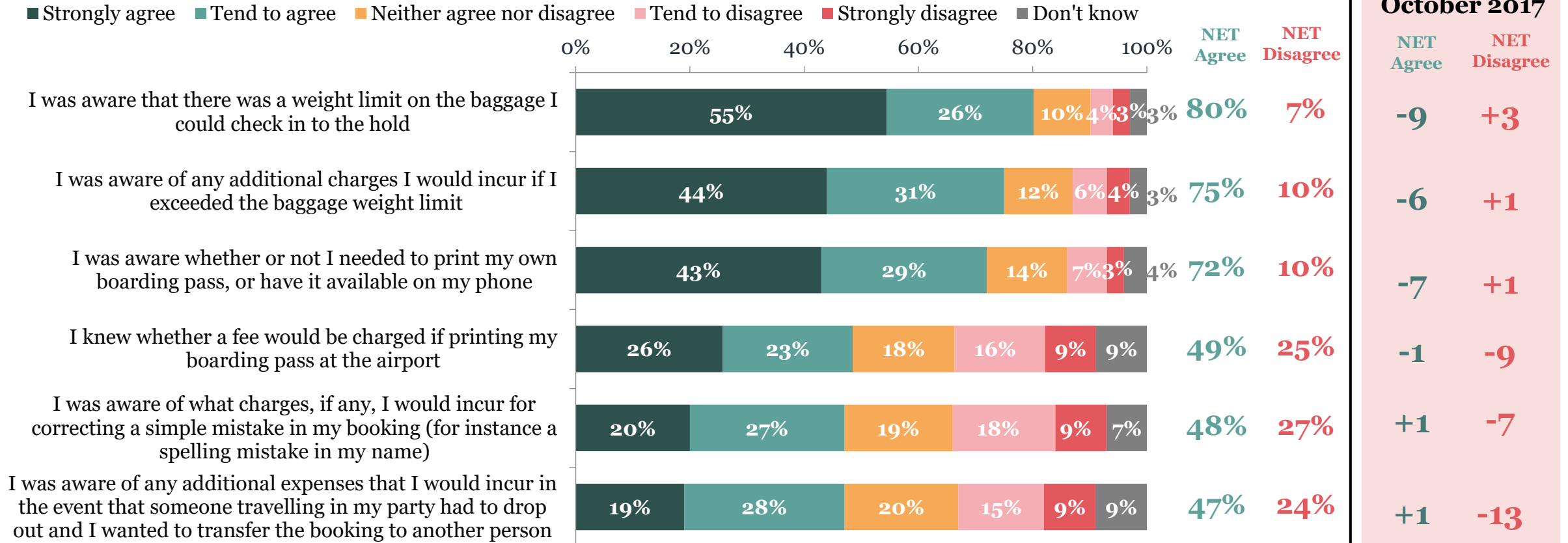


Less than half of passengers always read the terms and conditions, meaning many passengers are unaware of terms regarding missed and cancelled flights

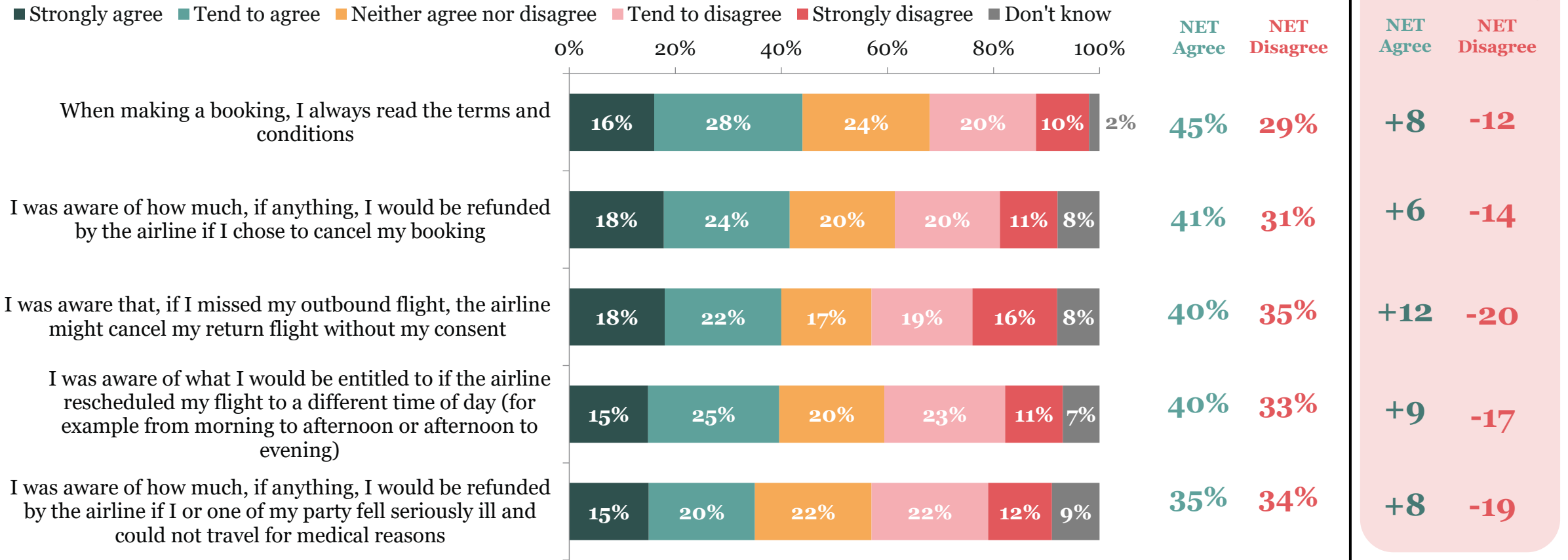
Terms and conditions – Part 2



The proportion of people who say they were aware of any weight and baggage charges has dropped since October 2017

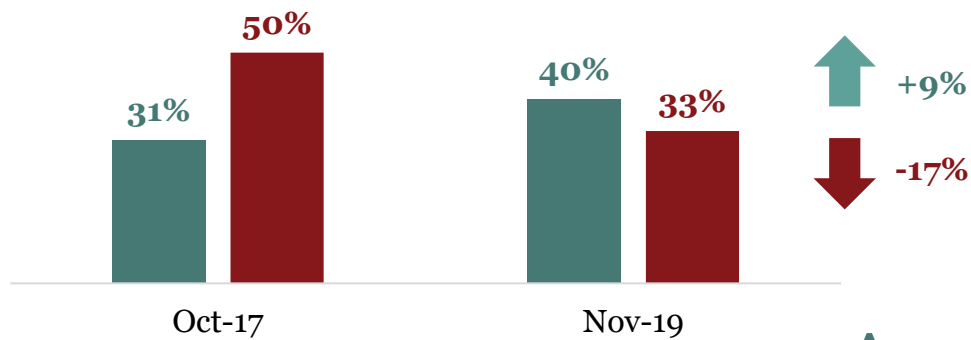


Awareness of terms and conditions regarding flights cancellations and rescheduling has increased since October 2017

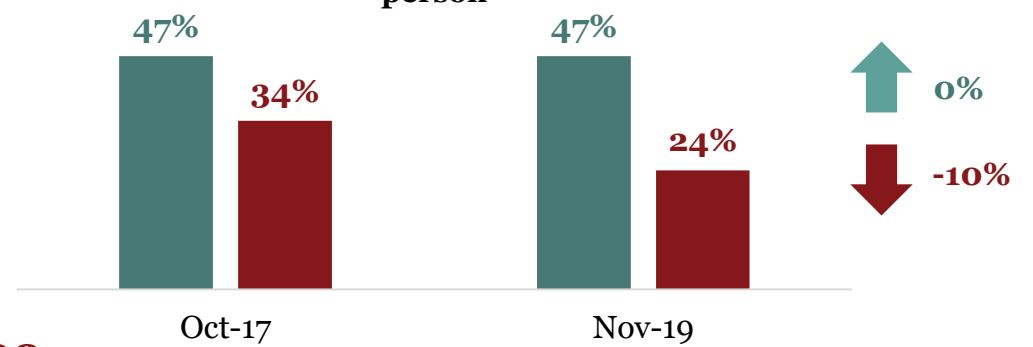


Disagreement on awareness of terms and conditions regarding flights cancellations and rescheduling has decreased significantly since October 2017

I was aware of what I would be entitled to if the airline rescheduled my flight to a different time of day (for example from morning to afternoon or afternoon to evening)

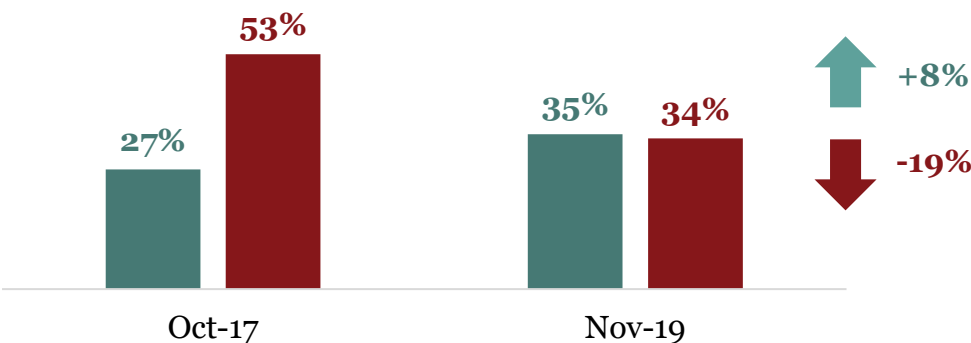


I was aware of any additional expenses that I would occur in the event that someone travelling in my part had to drop out and I wanted to transfer the booking to another person

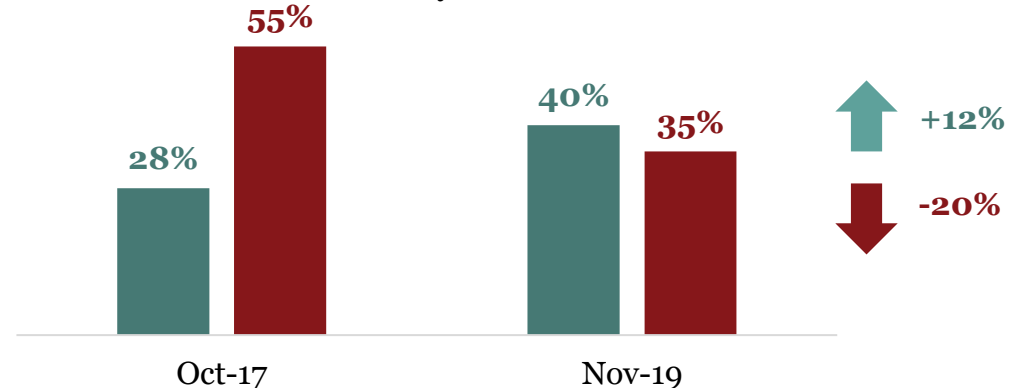


Agree | Disagree

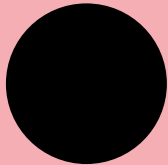
I was aware of how much, if anything, I would be refunded by the airline if I or one of my party fell seriously ill and could not travel for medical reasons



I was aware that if I missed by outbound flight, the airline might cancel my return without my consent



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