Civil Aviation Authority

Understanding the impact of COVID and the future of air travel
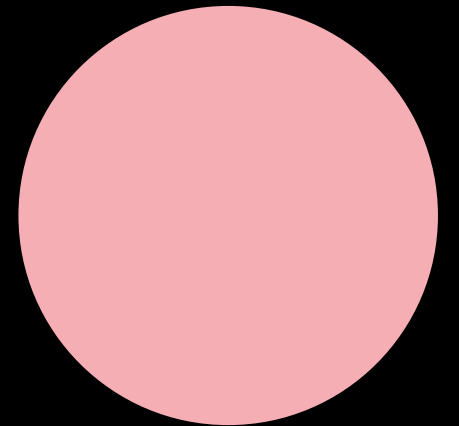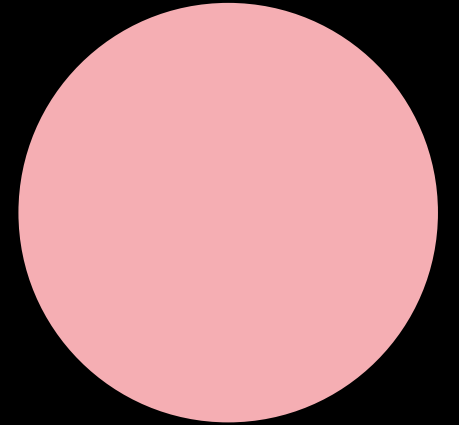
Contents

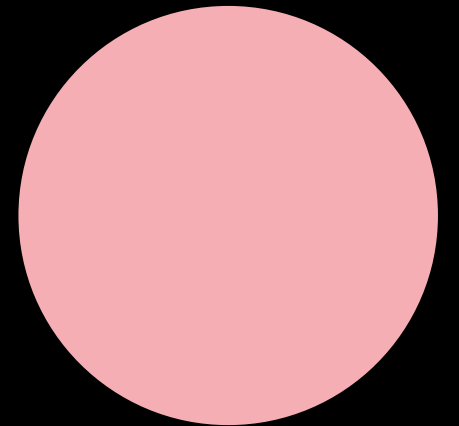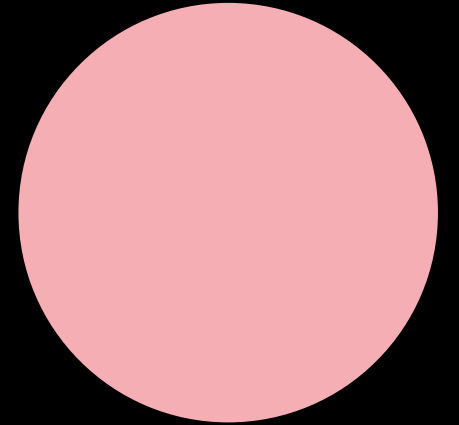Savanta:

Section 1

Executive Summary

Executive summary (1/2)

Anxiety about flying was initially high after the relaxation of the strictest controls on flying in Summer 2020. However, those who have flown over the course of the pandemic quickly gained confidence and knowledge after their first journey. Reflecting the final easing of restrictions in early 2022, most of those who are yet to fly or reduced the amount they travelled are looking to get back to their normal pre-pandemic flying behaviour. This can be facilitated by streamlining the COVID processes, providing clear information online / digitalising processes where possible, all of which will lead to minimal disruptions & delays.

The most notable impact of the pandemic is that it has served to intensify the negative peak pain points across the journey, namely the booking process, check in and security and the flight itself. Those travelling with additional challenges, such as elderly consumers, people with young families and vulnerable consumers tend to be more anxious and their levels of anxiety have remained higher, even after going on a flight post-pandemic.

Trust in airlines and airports has also been eroded as a result of perceived poor communication and 'penny pinching' behaviour over refunds and vouchers. This has impacted both low cost operators and those traditionally considered more trustworthy, and is likely to intensify with current staffing issues. Regular, clear and honest communication is essential to improve consumer trust, airlines that have done this best over the past couple of years stick out positively for individuals.

Executive summary (2/2)

In future, consumers expect the aviation industry to follow the current government restrictions, but have higher expectations over hygiene standards both in the airport and in the flight itself. While fears of catching COVID have subsided since the start of the pandemic, an expectation of regular cleaning and visible hygiene cues is likely to remain long term. This is in relation both to COVID and a general higher awareness of catching illness from other passengers in an enclosed space with limited air filtration.

Another consistent theme is that consumers have become more risk averse through the pandemic, and this is likely to be a lasting change. Consumers are so used to seeing crisis after crisis, impacting their health, life plans and finances, that there is a broad desire for more financial guarantees and flexible policies from airlines should things go wrong. Negative experiences with restrictive travel vouchers and holiday cancelation means that a lack of financial assurance is a significant cause for anxiety.

Despite being more risk averse, and anxious over plans changing or money being lost, consumers nevertheless continue to place high value on air travel for leisure, and want to return to their pre-COVID behaviour. The main area of concern now is around the disruption caused by staff shortage, while the cost of living crisis is expected to be a big barrier in the coming months. This is not impacting desire to fly yet, but may do in the future. Improving the experience now through excellent communication and customer care will help improve consumer confidence in the industry.

Savanta:

Actions for further consideration

- Many find it hard to articulate what 'trust' means in the context of flying. Budget airlines are generally perceived as more unreliable and have lower standards of customer service. Most consumers tend not to think about the overall safety of planes, airline staff and training – this is seen as a minimum standard for all airlines.

- There is a desire for airlines to provide information on destinations/restrictions directly on their website – integrated in to the booking stage - rather than forcing consumers onto the Government website. This would help alleviate stress and confusion early on.

- A system which allows documents to be checked without adding additional time, such as having a member of staff walking down the queue as they wait, would be preferred. Some comment that this has improved over the course of the pandemic.

- Flyers do not necessarily expect other people to be wearing masks and would prefer not to have to. But some will continue to do so themselves. Generally most do not expect airlines to be doing more than the government requires (apart from increased cleanliness).

- There is agreement that there should be more communication / consistency around what is expected in terms of restrictions and how they will be enforced, with some citing differences between outbound and return flights.

- Consumers have not always personally felt the effects of the cost of living crisis yet, instead they expect to in the near future. This may explain the high number of flights purchased for the upcoming 2022 summer. A cut back in flight bookings, impacting the aviation industry more significantly, is likely in 2023.

- Some that had flights cancelled during recent disruption were asked for feedback regarding their in-bound flights and felt that this lacked some sensitivity after having plans cancelled, disrupted or changed.

Savanta:

Section 2

Introduction & Methodology
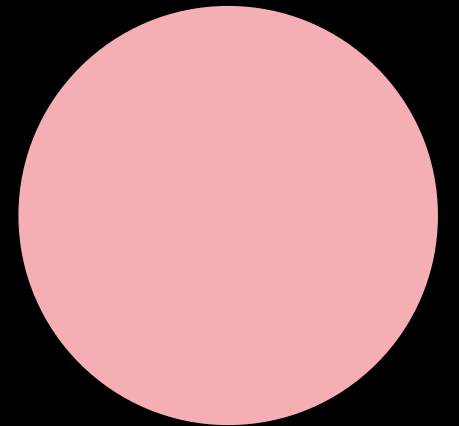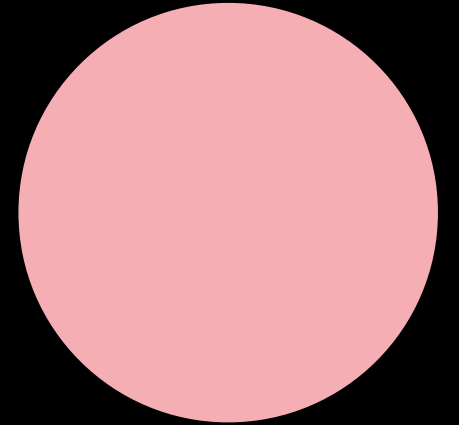
Background and objectives

Following two years of severe disruption to the aviation sector, the Civil Aviation Authority (CAA) are looking to take a step back and build a fresh picture of the attitudes and behaviours that consumers have when it comes to flying in the UK, in order to ensure they can better support travellers.

With this in mind, the CAA commissioned Savanta to carry out a detailed piece of deliberative research looking specifically at the following aims:

- Providing a comprehensive understanding of baseline attitudes towards COVID and flying among the general public;
- Identifying what factors trigger changes in confidence and willingness to fly, and what the 'tipping-points' are for stopping / starting flying again, to support CAA's ongoing activities;
- Understanding how people's expectations have changed as a result of the pandemic, and other factors;
- Gathering direct voice of the consumer insight to inform CAA's approach to regulation.

Savanta:

Methodology (1/3)

Savanta designed a deliberative approach alongside the CAA to enable us to fully explore the views and behaviours of flyers.

Our sample was split into 3 main audiences: those taking part in focus groups (General consumers), vulnerable consumers who took part in one-on-one interviews, and those who were due to take a flight imminently. Our focus group audience was segmented further into 3 separate groups: those who **did not fly** during the pandemic, those who **reduced their flying**, and those who **flew as much as possible** in line with the COVID restrictions. All participants were UK residents.

Each of the audiences took part in 3 phases of fieldwork:

- **Phase 1 –** an initial discussion to understand people's current position, and to brief them on phase 2;
- **Phase 2 –** a diary based task where participants explored various issues around the flying journey;
- **Phase 3 –** a consolidation of the full research process, where participants reflected on what they had learnt and how their views may have changed or been reinforced over the fieldwork period.

A sample framework outlining the 'General consumer' focus group audience is on the following slide.

Savanta:

Methodology (2/3)

Characteristic		n=
Gender	Male	9
	Female	11
Age	18-34	6
	35-54	6
	55+	8
Social grade	ABC1	14
	C2DE	6
Life stage	No dependents	7
	Young family (children <10 at home)	3
	Older family (children 10+ at home)	5
	Empty nester/retired	5
Ethnicity	Ethnic minority backgrounds	4
Region	England (North)	5
	England (Midlands)	4
	England (South)	5
	Scotland	2
	Wales	2
	Northern Ireland	2
Flying behaviour	Did not fly at all during the pandemic	6
	Reduced their flying behaviour during the pandemic	7
	Flew as much as possible during the pandemic	7

A chart outlining the full methodology for each of the audiences is on the following slide.

Savanta:

Methodology (3/3)

	Set up		Fieldwork			
Audience 1 General consumers	Kick-off workshop	Sampling and recruitment	**1:** 3 90-minute focus groups with min. 18 consumers	**2: 5**-day diary task	**3:** 3 90-minute reconvened focus groups	Analysis and reporting
Audience 2 Vulnerable consumers			**1:** 6 30-minute in-depth interviews with vulnerable consumers		**3:** 6 30-minute reconvened in-depth interviews with vulnerable consumers	
Audience 3 Imminent flyers			**1:** 6 30-minute in-depth interviews with those about to fly	**2:** flight	**3:** 6 30-minute in-depth interviews with those who have just flown	

Respondents are increasingly informed and engaged

Savanta:

Report symbol key

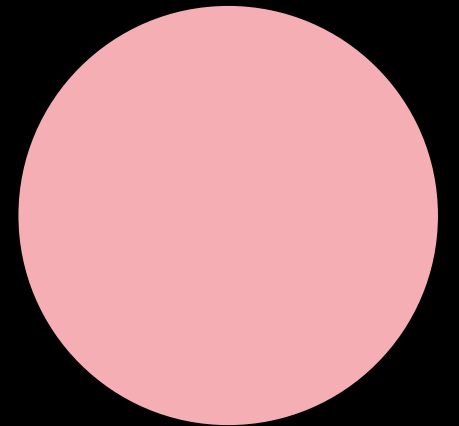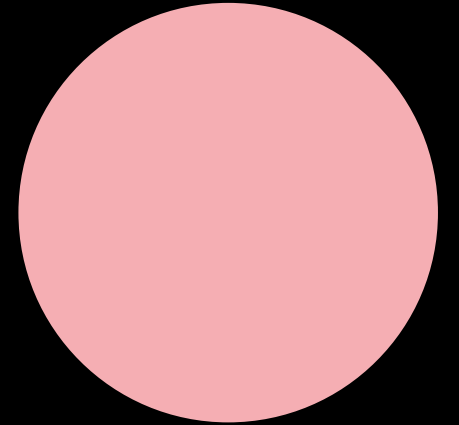= **Actions for further consideration**
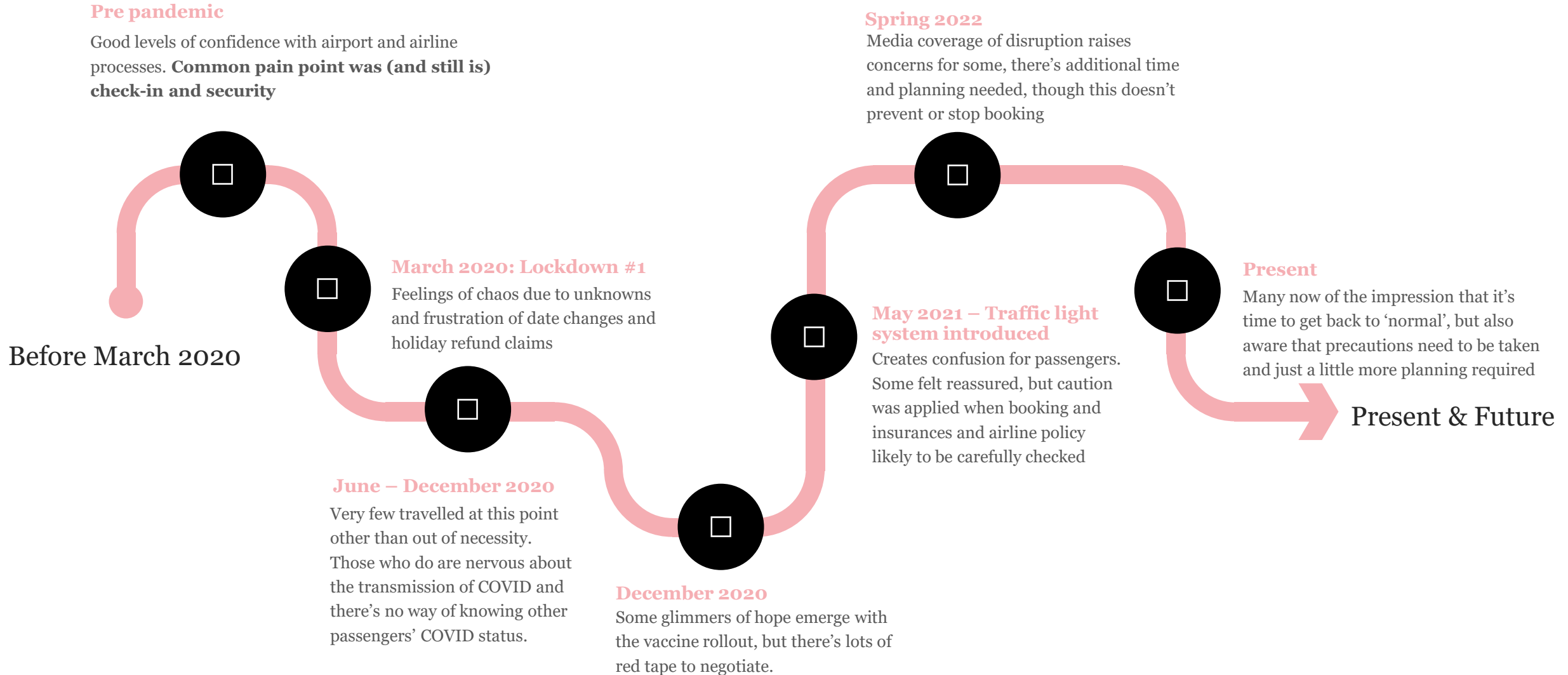
= **Imminent flyer findings**

CLICK TO PLAY

= **Audio clip**

CLICK TO PLAY

= **Video clip**

Savanta:

Section 3

Background and context

Timeline: summary of the pandemic against key aviation milestones

Pre pandemic

Good levels of confidence with airport and airline processes. **Common pain point was (and still is) check-in and security**

March 2020: Lockdown #1

Feelings of chaos due to unknowns and frustration of date changes and holiday refund claims

Before March 2020

June – December 2020

Very few travelled at this point other than out of necessity. Those who do are nervous about the transmission of COVID and there's no way of knowing other passengers' COVID status.

December 2020

Some glimmers of hope emerge with the vaccine rollout, but there's lots of red tape to negotiate.

Spring 2022

Media coverage of disruption raises concerns for some, there's additional time and planning needed, though this doesn't prevent or stop booking

May 2021 – Traffic light system introduced

Creates confusion for passengers. Some felt reassured, but caution was applied when booking and insurances and airline policy likely to be carefully checked

Present

Many now of the impression that it's time to get back to 'normal', but also aware that precautions need to be taken and just a little more planning required

Present & Future

Savanta:

Throughout the research, we identified a number of different passenger typologies. These mostly reflect different life stages, and influence their overall behaviours
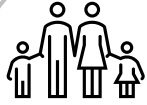
Families

- More hesitant to begin flying as they want there to be minimal disruption to their plans; cost to them is more than financial.
- Very aware of risks of isolation with children.
- If they have not yet flown, when the opportunity presents they will get back, but will seek assurances that it's fully safe to do so.

Pre-children / empty nesters

- The younger members of this group have low risk of severe illness, so have consistently been keen to 'get back to normal'.
- Those who are older needed more assurances, but air travel is an important part of their lifestyle.
- Regular travellers pre-pandemic, and tend to be the passengers who returned to air travel first (and are now more confident with processes).

Visiting family

- Tend to be travelling out of necessity rather than purely leisure.
- Therefore more likely to have ongoing anxieties about travelling, and feel happier if everyone is following the rules and taking precautions (e.g., high levels of cleanliness, mask wearing, pre-flight testing).
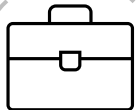
Business flyers

- More confident as very regular flyers pre-pandemic, and also tend to have returned to air travel early on.
- They are happy to follow any necessary procedures such as mask wearing as they want to protect their ability to fly and maintain the point of confidence with flying that has been established.

Vulnerable flyers

- Heightened awareness of the risks and scenarios that they may find themselves in, for example extended queue / standing time.
- Most likely to be aware of restrictions and how they will cope with these if their disability needs to be taken into account.
- Generally still more anxious about the process of getting through the airport and flying.

Before the pandemic, many had confidence in flying, the main cause of concern was getting to the air side of the airport

Before the pandemic **flying was seen as a necessary inconvenience but nevertheless still the quickest and easiest method of going abroad**. Just under three quarters (72%) of adults had confidence in airlines and airports, with six in ten (61%) saying the balance between security screening and convenience to passengers at UK airports is about right.
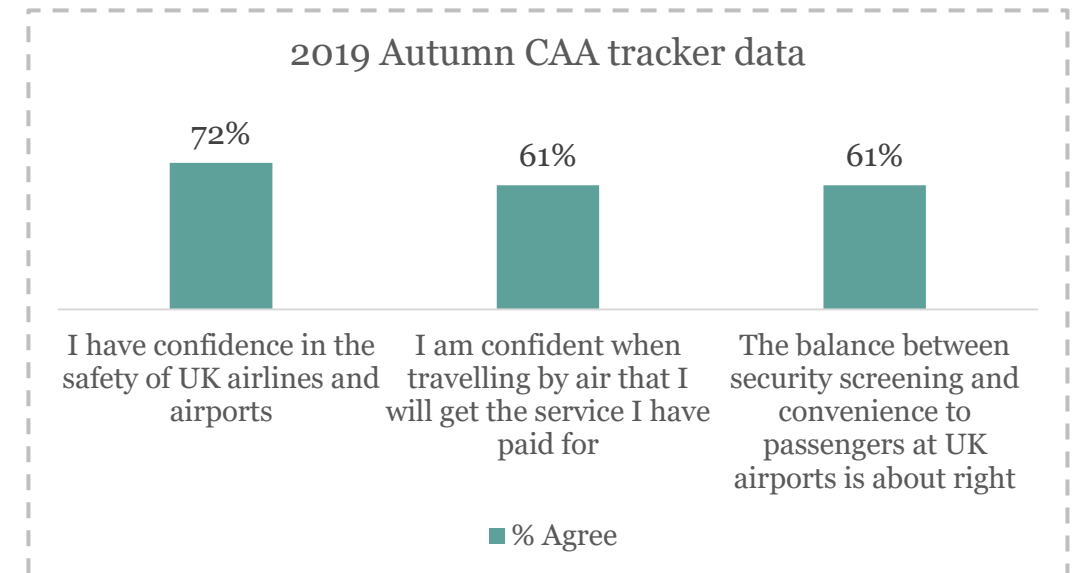
When planning and booking a holiday many felt excited about the prospect of going away, so generally enjoyed the process. There was (and still is) some **friction caused by check in and security within the airport**. For most this was the hardest part of the journey. Once past security the excitement of holidays builds again.

Many were aware that opting for the lower budget or no frills airlines resulted in some hidden costs such as seat choice and hold luggage costs.

"You always feel you're not really on holiday until you've passed security."
Reduced flying during the pandemic

"Well, to be fair, I do like flying, I like the take-off, I like the feeling, and I probably do like the landing. I don't like the turbulence and I don't like it when it's even just a bit bumpy in the clouds, but as long as it's a smooth flight I like it."
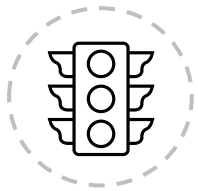*Did not fly during the pandemic, reduced mobility*

2019 Autumn CAA tracker data

72%	61%	61%
I have confidence in the safety of UK airlines and airports	I am confident when travelling by air that I will get the service I have paid for	The balance between security screening and convenience to passengers at UK airports is about right

■ % Agree

*Data source: Autumn 2019 – CAA tracker, wave 8_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=3501)

Savanta:

During the height of the pandemic there are some key touchpoints that changed perceptions and behaviours over the short and long-term

Vaccine rollout – Winter 2020/21

With the majority of consumers getting vaccinated, concerns about the safety of flying diminished. **The biggest barrier became about the paperwork** and pre-flight preparations which created a sense of uncertainty about flying. Clearer and centralised guidelines would have been appreciated.

> "I feel more confident now we've got the vaccine going all across the world. It's more relaxed then, I know I won't get COVID so bad. [Now] there's no forms to come back into the UK, there's only one going out depending on the country you're going to, and no isolation... That makes it easier and acceptable to travel."
> *Did not fly during the pandemic*

Traffic light system introduced – May 2021

Regularly changing rules and categories were hard to follow, and there was also a risk that changes made while you were away could lead to isolation or additional expense. This has also had a long-term impact on behaviour, with consumers now **taking credit cards and laptops away** with them should they be stuck abroad, as well as being more likely to **monitor travel advice** during their holiday.

> "The traffic light system just caused a lot of unnecessary confusion for such a long time, and, as much as we were desperate to get away last year for a break, it did kind of put us off for a while because nothing was every clear, and everything just kept changing so rapidly."
> *Reduced travel in pandemic*

Media coverage – Spring 2022

Most respondents have heard regular reports of **flight cancellations and delays at airports**. While concerning, this is generally believed to be temporary. Nevertheless, those with trips this Summer are planning to arrive at the airport earlier than usual to mitigate any risk to their journey.

> "I will arrive at the airport at least three hours before my flight to Prague...Security is quite a serious thing. They can't just put somebody in security. You can't start them one day, and then doing security the next day. I imagine there's a lot of training and screening for people like this."
> *Did not fly during the pandemic*

Savanta:

However, perceptions of flying are heading in a positive direction, with concerns more likely driven by non-COVID variables

There is a good level of confidence amongst those that have completed their first flight since lifting of restrictions. Generally there is an acceptance of personal responsibility in terms of mask wearing, being fit to fly and taking necessary precautions as part of the return to 'normal'. There's an element of being more relaxed now that to return to the UK there is no requirement to present paperwork.

Just over half (55%)* that have not flown within the last 12 months cite pandemic-related concerns as the reason. However, they are also feeling more confident and expect to return to air travel in the near future.

With the wider economic landscape **squeezing disposable income,** cost is becoming a more significant barrier to travel. With this in mind, some are considering changing the frequency and type of holidays they chose, for example those with more available time, such as empty nesters, may opt for more frequent, shorter-haul flights rather than long-haul flights.

There are other variables that are mentioned, including the ongoing staffing issues in UK airports, and less frequently, the war in Ukraine and the impact on the environment, although these are not currently having a noticeable impact on behaviour.

"I am paranoid about germs in the air when you're flying, but also even on public transport anyway, but there's also that other side then that COVID isn't going to go away. I want life to get back to normal and, for me, holidays were a massive part of my life, it's just a risk you take on any transport now, unfortunately."
Reduced flying during pandemic

"As far as the flying industry is concerned, having lifted all of the restrictions, it's back to normal, isn't it? The travel industry has picked up. In fact, at the weekend the restrictions were picked up, the travel industry was so busy because there was a big rise in people booking again. So, it wouldn't affect me going forward."
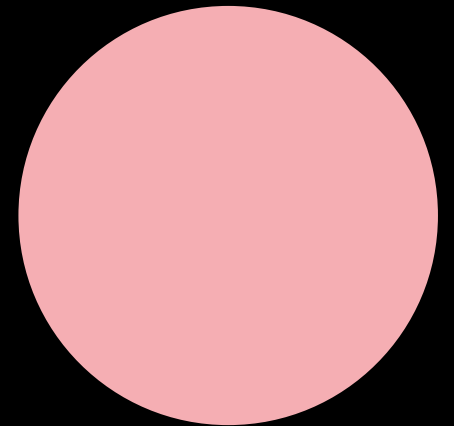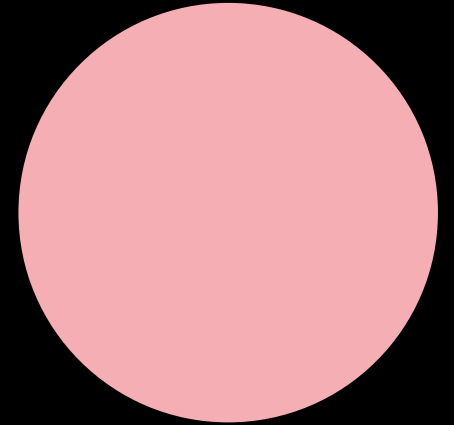*Reduced flying during pandemic*

Many find it hard to articulate what 'trust' means in the context of flying. Budget airlines are generally perceived as more unreliable and have lower standards of customer service. Most consumers tend not to think about the overall safety of planes, airline staff and training – this is seen as a minimum standard for all airlines.

*Data source: Autumn 2021 – CAA tracker, wave 10_Q5. Why have you not flown within the last 12 months / last few years / never flown? Base: All who have not flown in the last 12 months (n=2,917)

Savanta:

Section 4

Impact of COVID on the end-to-end journey

Before COVID, the typical journey pain points were around check in and the flight itself

Planning/booking	Travelling to the airport	Arrival – check in and security	Departure lounge/boarding	In-flight experience	Experience at destination / connections	Returning to the UK
Higher points						
Excitement about the holiday and having something to look forward to			This comes as a point of relief following check in and security		Most are more patient about being made to wait at their destination	
Companies generally do a good job making it easy to research and compare	Many are used to this journey and know the most suitable mode for them			For many this is an exciting and relaxing part of the journey		Some are relieved and happy to be returning home
	This can be more stressful for those with children or accessibility needs			Those with accessibility issues face additional difficulties here, which can put them off booking a trip	Connections are generally stressful, travellers either have too much or too little time	The airport experience can be more stressful with the language barrier, and fewer members of staff.
Lower points		This is the most stressful point for most travellers				The return journey can be negative with the sentiment of 'just wanting to be back home'

In our research we have seen the impact of the behavioural science principle of the '**peak end rule**', that consumers will judge the journey experience on its **most intense point (its peak), and the ending**. For the aviation industry this puts added pressure on measures (often small) that can be done to **alleviate stress at these peak points**. This can include improving communication, streamlining the in-airport experience, simplification of processes and customer care. Smoothing out these peaks can **improve general trust in airlines and the overall experience**.

Savanta:

Post-pandemic, the negative peaks have intensified, but not the positive peaks

	Planning/booking	Travelling to the airport	Arrival – check in and security	Departure lounge/boarding	In-flight experience	Experience at destination / connections	Returning to the UK
Higher points	Excitement about the holiday and having something to look forward to			This comes as a point of relief following check in and security		Most are more patient about being made to wait at their destination	
	~~Companies generally do a good job making it easy to research and compare~~	Many are used to this journey and know the most suitable mode for them		People like a more structured boarding process, finding it more efficient	For many this is an exciting and relaxing part of the journey		Some are relieved and happy to be returning home
	The biggest change post-pandemic comes at this stage. There is additional concern over local regulations, additional planning needed, chance of cancelation and people not getting money back fairly	This can be more stressful for those with children or accessibility needs	Additional queues add to the challenges and mean people need to allow more time	More recently, the disruption caused by staff shortages has negatively impacted what was previously a positive peak	Those with accessibility issues face additional difficulties here, which can put them off booking a trip	Connections are generally stressful, travellers either have too much or too little time	People have found different rules confusing, with planes often having the same signage but different standards on outbound and return flights
Lower points			This is the most stressful point for most travellers		There are added hygiene concerns, and some confusion over requirements	Issues around Brexit and staffing have made connections more difficult	

As a result of the pandemic, and other related issues including staffing and the cost of living, **the 'peaks' of the journey have intensified**. Consumers feel that in the case of air travel, **a 'flat' experience is a good one**, meaning those travelling with low expectations can be pleasantly surprised by a stand out experience. Loss aversion among consumers appears to have been accentuated by the pandemic and this trend will likely continue in the context of the cost of living crisis. This is particularly evident in the planning an booking stage as people have lost trust in airlines and fear the impact of changes.

Savanta:

Emerging from the pandemic, there are some clear changes consumers would like to see across the journey

Planning/booking	Travelling to the airport	Arrival – check in and security	Departure lounge/boarding	In-flight experience	Experience at destination / connections	Returning to the UK
Accessible Information – many have said would be useful at the point of booking, however, they are happy to be directed to a verified single source of information **Clear policies** – Insurance companies need to clearly highlight how their policies are flexible to future changes Consumers want a flexible airline policy in the case of cancelation, with an option for receiving cash back or vouchers.		**Security** – additional staff are needed as we 'return to normal', but passengers sympathise that it's not a quick fix. There is also suggestion of using technology and digitalisation to speed processes e.g., an app for paperwork which links to boarding tickets	**Staggered boarding** – consumers like a more structured boarding process, loading the plane section by section	**Staff** – Exemplary behaviour from staff can set the tone, offering hand sanitizer and wearing masks where applicable		**Consistency** – travellers expect some consistency over standards, and good communication on what is expected of them

Visual cues – seeing staff cleaning the airport and being offered sanitizer amenity packs on board a flight is reassuring and allows them to take some control.

Checking procedures – this may well be outdated shortly, however, there is a key theme that many want to see their documents actually checked by a member of staff

Savanta:

Exploring the typical journey: stage by stage
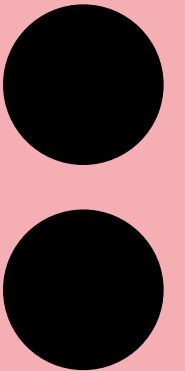
COVID restrictions and the risk of plans changing are playing a significant part in people's holiday destination decisions

Generally, consumers are more likely to consider traveling to countries that **have eased their restrictions** in an effort to minimise cost and hassle. This behaviour is **likely to continue long term** while restrictions are in place abroad.

Some, suggested they would rather opt for **more short-haul flights**, while others, particularly those without children or empty nesters, are looking **more into staycations** as opposed to frequent trips abroad, with a view to going on 'one big trip a year'.

Some found (or continue to find) it difficult to get past the planning stage due to these additional considerations. This can be for a number of reasons, e.g. they find the additional hassle frustrating, they cannot afford to lose money due to cancellation or changes, or they had their fingers burnt during the pandemic and have lost faith.

However, we found that once people have done their first flight 'post-COVID' they **feel a lot more confident choosing from a wider pool of destinations** – as they are able to find the information needed quicker and are less worried about getting it wrong.

"Confidence has returned, [at first] I didn't want to bother with the hassle of all these different tests that you have to pay for and the forms to fill in. And if it got cancelled, you might get money back but you might get vouchers, so then you'd have to rebook. It's just more hassle than it's worth really. So yes, definitely, things are a bit more predictable now."
Did not fly during the pandemic

"Communication is key. The airlines should be giving you information, what the restrictions are, what the new rules are, rather than passengers having to go searching for it. In the world of mobile phones and apps and push notifications, that shouldn't be an issue."
Reduced flying during the pandemic

There is a desire for airlines to provide information on destinations/restrictions directly on their website – integrated in to the booking stage - rather than forcing consumers onto the Government website. This would help alleviate stress and confusion early on.

Savanta:

Media coverage of recent delays in airports has caused concern, however this does not greatly impact decisions when booking

Additional pre-flight considerations

Imminent flyers especially felt more anxious pre-flight due to the large amount of media coverage about flight disruptions.

"Very nervous, not sure what to expect when I arrive due to the issues I've seen at Manchester airport on the media."
Imminent flyer

Around the time of booking – having had their 'fingers burnt' during the pandemic, many are doing more **research into insurance options** in the case of cancelation or last minute restriction changes. This is expected to be a long term behaviour change, especially with reduced trust in airlines. Generally, when booking, people aren't thinking ahead to the airport experience, with the excitement of planning a holiday overriding any concerns.

A few days before the flight – the current level of restrictions (c. May 2022) for most destinations are not an issue, **most are happy to do quick and easy** PLFs and know how to navigate government website. In the future, an extra cost would make people reconsider potential locations.

On the day of the flight – most would plan to allow extra time to account for extra queues. When probed they **could not think of any other solutions** however, this would not be enough to put them off booking a flight.

Savanta:

The pandemic, combined with associated challenges such as the cost of living crisis, has led to some changing their travel habits

Additional pre-flight considerations

Behaviour change

Imminent flyers say that they've been asked by airlines to arrive in good time before their departure for flights to mainland Europe whereas before they would have just needed a couple of hours.

"I've had an email to make sure I am at the airport at least 3 hours before my flight, I will make sure I am there before that."
Imminent flyer

Some consumers, generally families or vulnerable flyers, are more likely to book through packages for the increased security around refunds, **even at a higher cost**. Younger people are more likely to risk booking separately.

Many are not actively thinking about a switching to a cheaper operator, although they would be open. Empty nesters and those without children report having a little **more flexibility on cost and timings**.

There is a large contingent of people who already consistently picked cheaper airlines even though they knew it would be a worse service. This is typically younger travellers who are more willing to sacrifice comfort.

People who are more anxious about flying, and are more sceptical about where to go and how to get there, face higher barriers at this stage than other groups.

CLICK TO PLAY

Reduced flying in pandemic

Being more likely to book through a package

Savanta:

Most have gone back to travelling to the airport the way they would have pre-COVID

The majority mention that they now plan to **get to the airport slightly earlier** to avoid additional queues after seeing stories in the media. This does **not necessarily put consumers off flying**.

Aside from looking to take into account longer queue times, most have been quick to return to pre-pandemic behaviour:

- Some, such as those with less financial security mention a preference for public transport to save money;
- others prefer driving or getting a lift to guarantee timings, reduce and carrying luggage;
- this stage can be more stressful vulnerable flyers or those with children who may have to pay more for a private taxi.

Only one participant (who did not fly during the pandemic) mentioned that they would now rather use a personal car as its less crowded than public transport.

"Although I am slightly concerned regarding busy public transport with many passengers not wearing masks, it doesn't concern me too much. I would allow for more time at airports, as the various form filling and rechecking can take a while."
Reduced flying during the pandemic

A picture from an imminent flyer who parked at the airport and rode a bus shuttle to the terminal as they would have pre-COVID. They struggled to find a parking space initially, however the bus shuttle was regular and easy to navigate.

"You have to find your own parking space and we've been driving around for ages, we feel a little stressed about this and wonder if we will ever find a place, there is nobody to guide you. We finally find a place, go to one of the many bus stops and a bus arrives almost immediately, the bus is clean and tidy and soon drops us off at Terminal 1.M."
Imminent flyer

Savanta:

Navigating through the airport has always been the biggest point of anxiety, and this has been reinforced over the past 2 years

Towards the start of the pandemic there was added concern about close contact, and a **desire for more organisation and social distancing.** Over time, **most consumers have become less nervous about COVID** and have returned to normal behaviour and expectations of other passengers.

Now the main issues at this stage are over **delays and staffing**, with many check in windows being closed adding to the stress as soon as you arrive. Consumers **don't see staff as being knowledgeable** about what's going on which makes experience worse.

At this stage travellers would like to see:

- Flexible check in windows (longer check in hours)
- Online check in (including uploading any COVID documents)
- Self-service check in windows
- 'Twilight check in'

This stage is the most challenging for the majority of travellers, although vulnerable flyers and those travelling with small children face additional barriers.

"One colleague commented that it took 1.5 hours to get through security at Schiphol airport, the only reason they made their flight home was because it was delayed."
Flew from East Midlands to Barcelona for leisure

"I've used twilight check in. You can check in your bag the night before, come back home, and then the next day you just go straight through to security, I really like that."
Vulnerable consumer, hearing impaired

CLICK TO PLAY

Vulnerable consumer, hearing impaired

On flexible check in hours reducing stress and queue times

Savanta:

Hygiene expectations when navigating through the airport have increased over the past couple of years

Travellers are broadly **less concerned about COVID than they were earlier in the pandemic.** However, they still want visual cues that hygiene is being considered.

Cleanliness concerns peak around this point as travellers are closer to people, and there is additional contact around touching trays and searching bags. This will become more important if there's a resurgence in cases or variants.

Generally, **travellers are still holding staff to higher standard than before the pandemic**. For example, some expect staff to continue to wear masks despite believing passengers should have the choice over this.

People expect staff to set an example, both in terms of hygiene restrictions and the checking of documents – especially after having spent the time and/or money on getting them. However, people want this to be done seamlessly, either before arriving on the check in, or while waiting in queues.

"Something that I feel across the airport experience is the cleaning side of things. The second I see something that's dirty, I'm going to assume that it's not being cleaned fully. I just expect to maybe see more cleaners out and about doing things."
Did not fly during the pandemic

"I like to see the airport is clean and tidy, surfaces being regularly sanitised. I expect the same when going through security and am pleased to see staff wearing masks and gloves here as they are in close proximity with others."
Reduced flying during the pandemic

Imminent flyers rarely noticed extra hygiene precautions being taken in airports.

"...there wasn't really any like Covid precautions there at all. Pretty much like back to normal."
Imminent flyer

Savanta:

This negative journey peak is further intensified for vulnerable audiences

The prospect of getting stopped by security is a significant cause for anxiety. Some specific challenges include **transporting medication** through security, difficulty **hearing announcements or reading signs,** and spending a **long time standing**.

Those who have used assistance have had very positive experiences and are full of praise for the service and staff. However, **many impaired travellers who have not applied for assistance will still face challenges** moving through check in and security.

Those with more severe disabilities will have increased levels of anxiety at this stage and say they will be "more cautious" moving through the airport. But this will not change their behaviour significantly.

"I have a lot of medication, and it's the fuss that they have to check the medication is all legal and I just get very stressed with that. I once had my bag taken out of my hold luggage without them telling me."
Vulnerable consumer, long term health condition and low digital literacy

Picture of security from an imminent flyer

"I have special assistance, so I haven't got to queue. [It works] very well. I get to the airport, go straight to special assistance, they take you straight through check in, security, and right up to boarding the plane. When you get back they take you all the way back through, outside to your taxi or whatever you've got waiting."
Uses passenger assistance for mobility and hearing loss

Savanta:

The departure lounge / plane boarding is generally seen as a relief after the most stressful part of the journey

Coming just after the most challenging stage, there is a sense among consumers that once you are through security *"the holiday starts here"*. **Excitement starts to build** at this point and continues on the flight.

Consumers like a more structured boarding process, finding it less stressful, and resulting in less standing around in the plane. This also gives staff more time to help passengers who may need assistance. People comment that this is a positive change resulting from the pandemic that they **would like to remain, long term**.

Consumers are **conflicted over COVID document checking**, as mentioned previously, they like to know that this is being checked after going to the effort to meet the requirements, however they would prefer a quicker boarding process. The impact of staff shortages on the departure / boarding stage is explored further in section 5.

"It seemed a bit more congested when we were waiting to get onto the plane, everyone was huddled together. When we've flown with some other airlines they have split up the boarding which I found a more pleasant experience. It saved the chaos of people pushing in and any arguments."
Flew from East Midlands to Barcelona for leisure

"Boarding and flying would be a positive experience, only because it comes immediately after going through check in and security. As soon as you get through that means you're basically on holiday. That's when the excitement starts for me."
Flew as much as possible during the pandemic

A system which allows documents to be checked without adding additional time, such as having a member of staff walking down the queue as they wait, would be preferred. Some comment that this has improved over the course of the pandemic.

Some imminent flyers reported that a staggered boarding process had been adopted by the airline which was more organised and preferred.

"…I started queuing quite early, and then they said, 'Actually we're going to call you up section by section'.' So yes, that was really good actually, really well organised."
Imminent flyer

Savanta:

Consumers generally have higher expectations of hygiene standards on the plane than before COVID, a trend expected to remain

Many are now able to feel excited about going away, most consumers are **positive about the flight itself**.

Concerns around safety have subsided compared to the start of the pandemic, with increasing numbers of people having completed trips without getting ill. This increasing confidence has been supported by the vaccine rollout and a shift in the public conversation around COVID toward needing to 'get back to normal'.

However, there is still a **higher awareness of exposure to germs and other ill passengers than pre-COVID**. Passengers therefore expect **higher hygiene standards as a long term trend**.

Expectation of increased hygiene / safety cues include:

- Masks usage when passengers are ill
- Air filtration
- Hand sanitiser stations
- Regular cleaning
- Informing flyers on what is being done

Flyers do not necessarily expect other people to be wearing masks and would prefer not to have to. But some will continue to do so themselves. Generally most do not expect airlines to be doing more than the government requires (apart from increased cleanliness).

There is agreement that there should be more communication / consistency around what is expected in terms of restrictions and how they will be enforced, with some citing differences between outbound and return flights.

Savanta:

Most are more patient if being made to wait at their destination airport, compared to when they leave the UK

Generally, consumers are more patient about security and baggage reclaim at their destination due to the excitement about the holiday starting. There is still **some nervousness around security checks;** if you need to catch a bus or train onto your final destination, then **the stress of waiting for baggage** can be challenging.

There are some frustrations around COVID documentation not being checked at the destination, but consumers are generally content **knowing it has been checked when they left the UK,** and glad for the reduced queuing time.

"I don't love that process of moving through the airport until I get through [customs]. If your baggage isn't there in a reasonable time, that's very stressful."
Flew as much as possible during the pandemic

"I'd say moving through the destination airport is a high point. I think it's the reality that it's all happening, you're like 'Oh, I got here, It's not gone wrong.' You know the fun's about to happen."
Did not fly during the pandemic

CLICK TO PLAY

A video from an imminent flyer arriving at their destination airport

Savanta:

Making a connecting flight has become more difficult over the past couple of years due to multiple interacting factors

Connections are almost always a **negative experience** for passengers. It is rare to feel there is enough time between flights, meaning a stressful rush through the airport and pressure to skip queues. However, longer transfer windows can make passengers feel restless and bored.

Connections have become **more of an issue post-COVID and in the context of Brexit**. Additional queues caused by staff shortages (and border control when traveling in Europe) means that the parameters have changed and passengers find it difficult to tell if they have 'enough' time.

This is particularly an **issue for those on business travel who often have a quick turnaround**. It has been compounded by a reduced flight timetable post-COVID meaning fewer direct flights. There is some confusion over why flight numbers have not returned to pre-pandemic levels.

"[Connections are] always really quite stressful, sometimes your flight is delayed getting in and it's break-neck speed to go and get your connection. I've had it where I've had to ask, 'Please let me go in front, the flight's about to go'. That's really, really stressful."
Flew as much as possible during the pandemic

"When restrictions first got lifted, one of the first challenges was there were fewer flights on. Many just completely stopped. This week I had to go via Frankfurt to get to Zurich whereas before I wouldn't even think about that. This compounds the delays, because you're going via a hub you've got to go through European Security. When we were in the EU that's fine because you'd just walk straight through. But now because of Brexit you're in this massive queue. I had to push through to get through and that was an absolute disaster."
Flew from Birmingham to Zurich for business

CLICK TO PLAY

Frequent business traveller

On flight capacity

Savanta:

Most do not have concerns about the return journey, although navigating through an overseas airport can be more challenging

Lots of participants comment that they have **no concerns over the return journey home**. However, for consumers travelling as a young family the airport experience can be more stressful, including check in and security, with many tired after their trip, often experiencing a language barrier, and fewer members of staff in some quieter airports meaning navigation is more difficult.

Different requirements for mask usage and social distancing can be confusing. Some referenced airports and planes having the same signage as on the outbound journey, but seeing different levels of adherence.

After returning to the UK airport, **many who have flown recently report seeing worse queues and more staffing issues than when abroad**, coupled with being eager to get home the additional time spent queuing can be frustrating, and some are **confused about why the situation seems worse** in the UK.

"I think there are delays with the UK with the passport scanners and particularly new passports with Brexit etc so I would expect some staff on hand to make sure that things are moving properly."
Vulnerable consumer, long term health condition and low digital literacy

"I find for the destination airports, in Egypt for example, there's still a little bit of a language barrier and they just want to shift you along as quickly as possible so there's not much communication. So that does feel stressful coming back."
Reduced flying during the pandemic

"Flying out to Germany we had to have a mask on, but on the way back there were no masks in the airport, and no masks on the plane. So completely different, but the difference wasn't really documented."
Flew from Birmingham to Zurich for business

Some imminent flyers noticed that there were different COVID requirements on outbound and inbound flights.

"The only thing that was different was when we flew into USA and upon arriving we were told to wear masks, however when we left USA to fly back into UK – there was hardly anyone in JFK wearing a mask so that was pretty interesting."
Imminent flyer

Savanta:

Section 5

Future travel behaviour
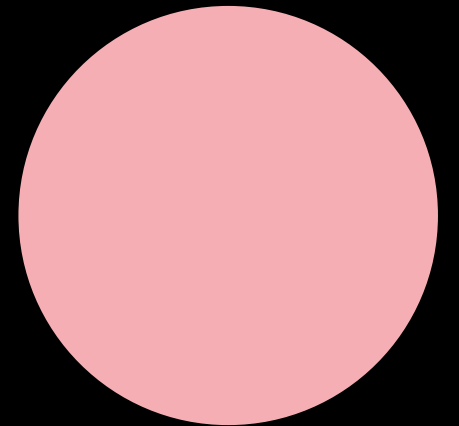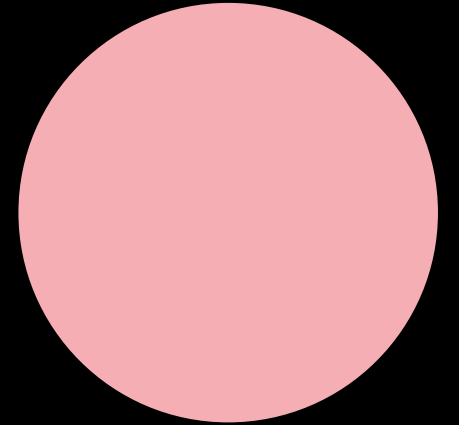
In the long-term consumers expect increased uncertainty to continue, making extra planning necessary

Through the pandemic, **consumers have become accustomed to regular disruption**; despite restrictions lifting, most still feel an increased level of uncertainty surrounding flying which is expected to continue. Despite this, leisure travel is still a priority for the majority.

Consumers are **therefore expect to continue taking extra steps** to mitigate any disruption in the planning process:

Extra planning steps:

Checking UK/destination COVID restrictions	Travel insurance covering COVID disruptions	Ensuring refund/voucher policies
Short-haul > long-haul flights (closer to UK)	More comfortable with 'staycations'	Leaving extra time throughout the airport journey

"It doesn't put me off, I just think you've got to make more time to plan around...it's a lot more long-winded, like everybody's saying, isn't it now, with the planning and booking..."
Reduced flying during the pandemic

"I feel as though things like cancellation policy might be taken in to account..."
Vulnerable consumer

"Since the pandemic I have thought more carefully about what is covered in my insurance policy...This year I have only booked shorter flights within Europe so that if anything happens it would be easier for me to get home without too much expense..."
Vulnerable consumer, mental health

"I would want to make sure I knew what the refund policy for the flight was in terms to COVID. I would also want to know about the COVID situation in the country I was looking to travel to."
Did not fly during the pandemic

Savanta:

For most, a resurgence in COVID cases would not stop them flying, rather the responsibility lies with airlines/airports to reassure on safety

- Consumers struggled to imagine a COVID resurgence on a scale big enough to stop flights altogether. **Most people value flying for leisure and would be eager to continue**.

- Instead, if there was a resurgence in cases they would expect airlines/airports to react by **reintroducing pre-flight tests, mask wearing, social distancing and uphold cleanliness**.

- Additional small measures to manage queues and make processes seamless would be expected to facilitate an ideal level of travel.

- If flying was still possible, **consumers would want airlines/airports to communicate better** about any disruptions, restrictions and delays, as well provide the appropriate refunds/vouchers. Some suggested regular SMS updates from airlines before and during a trip.

- Post-pandemic people are more aware of the possibility of catching an illness from other passengers. Some vulnerable flyers would reduce/stop flying due to health and safety concerns and also anxieties surrounding flight cancellations should there be a significant resurgence of COVID.

[If there was a resurgence] "I reckon they would put a process in again to make you feel secure if you're flying. I don't think it would put me off flying because the one thing you want to do is go out and about, you don't want to be confined in the same space…we've got to learn to live with and just take it as it comes."
Vulnerable consumer

"I reckon maybe when you're going on a flight and it's going to be busy, there should be maybe a staggered timing for people to time up so there's no massive queues waiting…Security is always, well, frustrating…everything's totally all over the place, take belts off, shoes off, whatever, that's just something that could be streamlined…I just think generally make the customer feel more relaxed about the whole experience."
Vulnerable consumer, long term health condition and low digital literacy

"I mean, now they're talking monkey pox is out, is that going to be the next thing? Are we going to start being tested for monkey pox now? I mean, is this the new normal now for when you go abroad?"
Imminent flyer

Savanta:

Consumers expect the cost of living crisis to be among the biggest issues impacting future travel behaviour

Looking to the future of flying, consumers expect the cost of living crisis/inflation to impact the aviation industry and flying behaviours. The most likely cause of behaviour change is **rising costs in other areas of life reducing the budget available for travel**. Consumers also expressed concern about the rising cost of fuel, and inflation more generally, increasing the cost of flying itself.

A large proportion of consumers referenced that at the planning/booking stage of travelling, affordability and low cost is a priority. Most consumers expected there would be a slight increase in prices, in response some **would start to consider changing the frequency or type of trips they book**.

Currently, however, many of those who were frequent flyers pre pandemic expect to continue prioritising leisure travel, and are **happy to make sacrifices financially in other areas of their life** to allow them to do so. Those who do have to make cut backs due to financial insecurity would be most likely to change the type and frequency of trips, rather than abandoning travel all together.

CLICK TO PLAY

Did not fly during the pandemic

On continuing to prioritise leisure travel when budgets are stretched

"Yes, it is a bit of a concern now, seeing how much fuel prices have gone up for holidays in the last two years that we didn't travel, and we budgeted and thought that we had enough, and we didn't."
Reduced flying during the pandemic

"I think the frequency that people are flying now is going to be restricted. You may have gone on three flights a year, I know for one, I am limiting mine now with the bills going up. Everything's going up around it, so I've got to make cuts somewhere, and unfortunately holidays seem to be the thing that gets hit the most."
Reduced flying during the pandemic

Consumers had not always personally felt the effects of the cost of living crisis yet, instead they expect to in the near future. This may explain the high number of flights purchased for the upcoming 2022 summer. A cut back in flight bookings, impacting the aviation industry more significantly, is likely in 2023.

Savanta:

A minority of consumers expressed concern about the Russia-Ukraine war and climate crisis

| The Russia-Ukraine war was mentioned as an issue which had the **potential to impact flying behaviours**. Already a few consumers would avoid Eastern European countries and are more aware of no-fly zones.

| A small minority of consumers had concerns over the climate crisis and felt that flight options and prices could change in relation to this. Some are becoming more conscious of the option to choose a more environmentally-friendly flight. However, **environmental taxes were also mentioned as a concern for increasing the cost of flying**.

"The biggest consideration, I suppose, would be the state of the world, the health of the world, what's going on between Russia and Ukraine would be a consideration. Yes, all those things would be a consideration. Maybe some would stop you, but you'd have to wait up at the time."
Vulnerable consumer

Image from an imminent flyer boarding the plane

"I guess beyond the pandemic, I feel like the environmental issues are going to be the big thing…I guess trying any kind of technology or ways in which we can minimise the environmental impact."
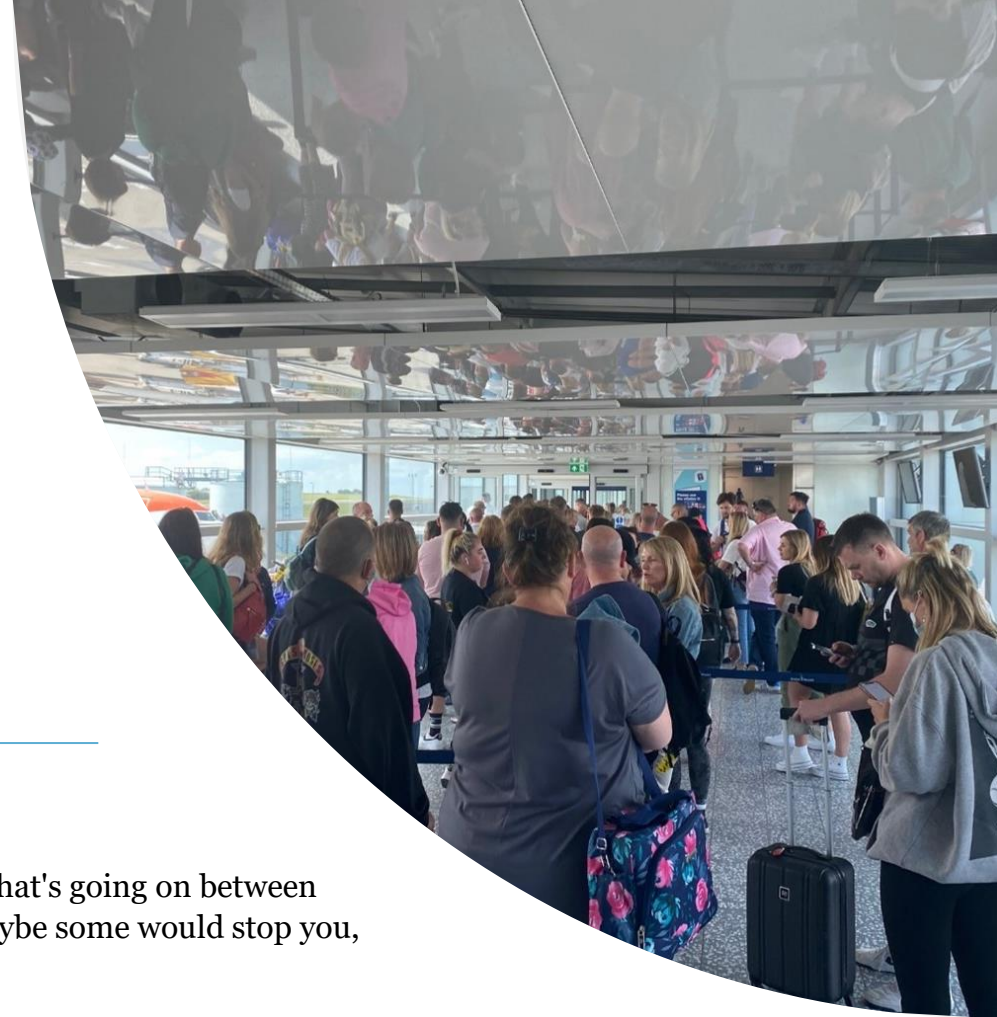*Vulnerable consumer*

Savanta:

Communication from airlines and airports is key to improving consumer confidence in uncertain times

In the case of any future disruptions to flying, **communication between airlines and airports, and consumers is key to improving confidence**. Experienced travellers would have a level of acceptance for future disruptions **if airlines are clear up front** about what these are and any implications.

If future issues are likely to cause disruptions to flying and increase queues, passengers want airlines to inform them so they can plan their time as well as try to **streamline airport processes as much as possible**. Some suggested live updates on wait times.

Image of airport queues from an imminent flyer

Consumers want to be informed about changes to necessary documents for flying, refund policies and which destinations the Russia-Ukraine war impacts. A minority of consumers also mentioned that they want airlines to communicate any steps they are taking to reduce their environmental impact such as alternative fuel options.

"If for example there were any issues relating to the journey home I would expect contact from the airline if it was a delay which was down to them or if it was a more serious matter then contact from higher sources e.g. embassy or UK government."
Reduced flying during the pandemic

[Support from airlines] "I think if they're more open and honest. Because of the cost-of-living crisis and everything going up, like we've mentioned, we have to turn to low-costers [low-cost airlines] more but low-costers can be pretty sneaky, you end up getting charges for things that you didn't realise, for example if you go to the airport and you check in at the airport, you have to pay."
Flew as much as possible during pandemic

Savanta:

Delays in passport renewals is an emerging risk for consumer confidence

An issue in the industry recorded by some consumers was that of delays in passport renewals in the UK. There were some concerns that passport renewal applications would not come back in time for an upcoming trip.

A minority of consumers suggested that **airlines could reassure and support them by guaranteeing money or vouchers back for booked flights if a passport renewal was delayed prior to an upcoming trip**. While there is an appreciation that passport processing delays is not the fault of airlines, there appears to be a misperception among some that airlines should take action or at least communicate to flyers on this.

"Read an article in my local newspaper about passports needing to be valid – Schengen area countries require a passport which is no more than 10 years old."
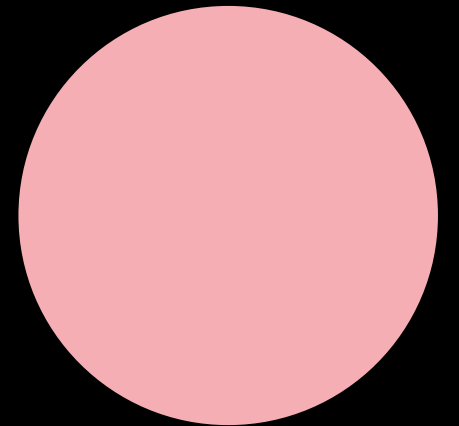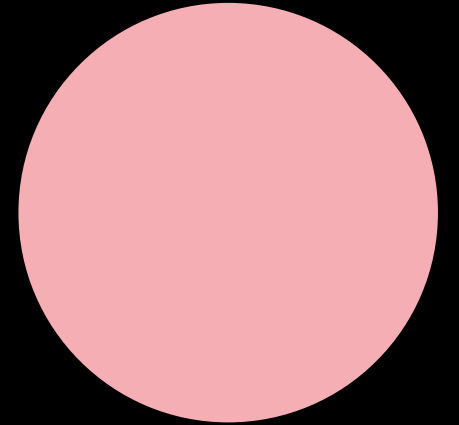*Vulnerable consumer*

CLICK TO PLAY

Did not fly during the pandemic

On the additional anxiety caused by a lack of financial guarantee in relation to passport office delays

Savanta:

Section 6

Current airport disruption deep dive

Staff shortages within airports are resulting in shops and restaurants airside being closed / struggling to manage with consumer demand

Imminent flyers noticed disruptions in the airside shops and restaurants where staff shortages meant that many were closed, resulting in large queues for those that were still open. This caused frustration among consumers as part of the enjoyment for many is being able to relax and buy refreshments after going through security - this is when they feel their holiday 'really' begins and they want to make sure they are ready for their flight.

"I was thinking, 'Oh gosh, there's nowhere I could eat.' I tried to go to a restaurant and one of them closed quite early, so then I went to one of the cafes, like, I think it was Costa or Pret a Manger. They had run out of food as well, so I just got a coffee. So, that was the only thing that I was a little bit concerned about...I'm assuming maybe they ran out of food or they were short staffed, I don't know."
Imminent flyer

"WHSmith closed .. no staff in duty free either."
Imminent flyer diary entry

"We were halfway through our drinks sat watching the runway and we were asked to drink up as the restaurant was closing...it was 12.10, lunchtime."
Imminent flyer

"But there's definitely a problem with the staff and stuff, I think, in that, well, the biggest thing that we noticed was I wanted to get some food...I was looking for something to eat, and there were queues, that's where there were queues. Queueing for food, everything, Costa coffee, everywhere, so I kept jumping from one to the other, wherever it was a bigger queue, and that was the most frustrating because I couldn't get anything to eat. And that was what really bothered me."
Imminent flyer

Savanta:

Imminent flyers experienced flight cancellations and delays

An imminent flyer had their flight cancelled last minute due to airline IT issues. Despite receiving a refund for the flight, they were unable to book an alternative flight and missed the holiday.

"There is an announcement. easyJet has had a Nationwide IT failure, they do not expect the flight to go ahead, the captain of the plane is speaking to us and says he will try to get more information but the situation is chaotic and he is not promising anybody anything...About 20 minutes later it is confirmed that the flight is cancelled and he doesn't give much hope of things being normal tomorrow."
Imminent flyer

Some that had flights cancelled were asked for feedback regarding their in-bound flights and felt that this lacked some sensitivity after having plans cancelled, disrupted or changed.

One imminent flyer had their return flight delayed and another had their connection flight delayed and changed last-minute which resulted in lost baggage.

"Yes, we were just sitting on the plane and then they told us. I could tell it was already delayed anyway, but then they told us maybe, like, half an hour in that it was going to be 50 minutes delayed."
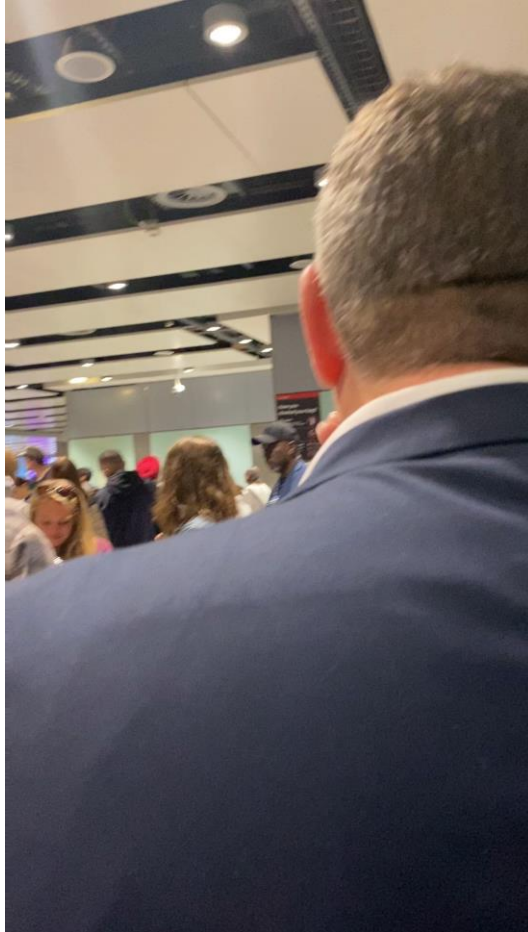*Imminent flyer*

"On the return, our flight was delayed and, again, we had to change flights in Brussels on the return. And the plane was late and we were told on the airplane what gate to go to because it's going to be late...clearly, they didn't manage in time to get the luggage off our aircraft and onto-, because it was so tight, we had literally run all the way there and then we literally ran onto the plane."
Imminent flyer

Savanta:

Queues at check in/security were notably longer for some imminent flyers

CLICK TO PLAY

A video of airport queues from an imminent flyer

CLICK TO PLAY

*A video of check-in/baggage drop off queues from an imminent flyer*

A picture of security queues from an imminent flyer

Savanta:

Boarding and departure is one of the stages most impacted by staff shortages

Mirroring some of the dramatic stories seen in the media, some of our imminent flyers experienced disruption between the point of security and the plane taking off. This ranges from issues such as gates opening late, and slow boarding due to limited staff, through to more severe cases of flights being cancelled at the very last minute.

This disruption comes at a stage that is typicaly a positive peak in the journey, causing a great deal of anxiety, especially within the context of the negative stories passengers have read about in the media, and a fear of cancelation even after they have boarded the plane.

However, it is worth noting that other imminent flyers did not experience this, and had a positive, more *typical*, boarding experience.
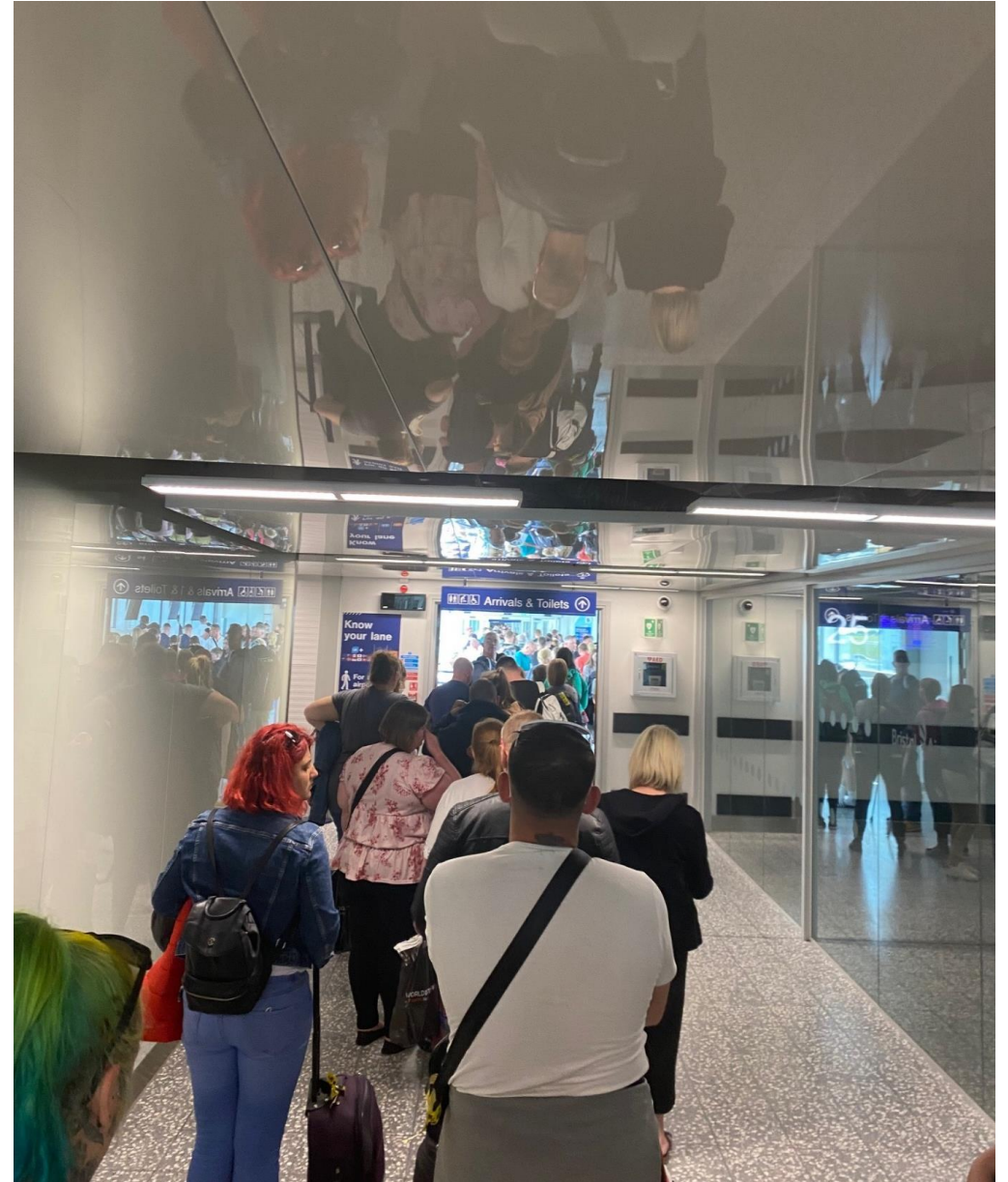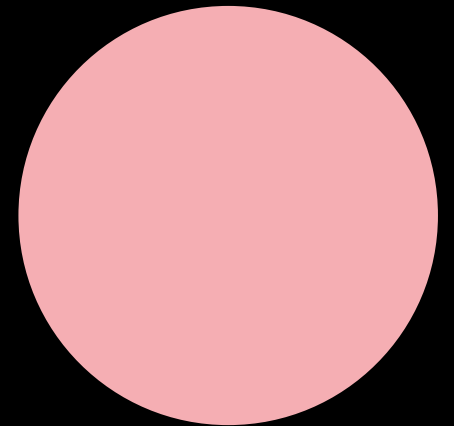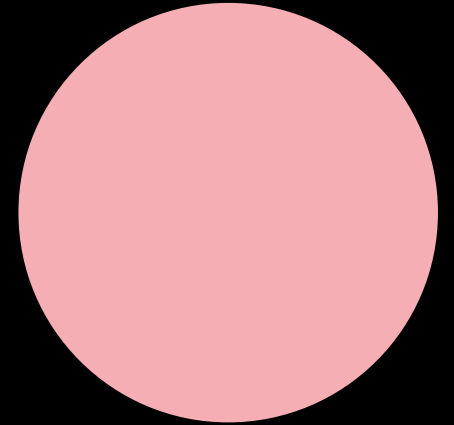
Section 7

Appendix

Further detail on:
Passenger attitudes at different stages of the pandemic;
Current media coverage;
Assistance awareness

During the initial stages of the pandemic many felt the uncertainty; flights were cancelled and alternatives were being arranged

Some respondents know people that were directly impacted at the very start of the first UK national lockdown and found it harder to get back into the country. Some note that their travel agents made contact and helped to sort everything out.

As the early stages of the pandemic played out some were still thinking about booking holidays (those without families), but were more cautious about outlaying their money to companies due to uncertainty, and were sure to look into cancelation policies and what their holiday insurance would protect them against.

Many had flights cancelled at this time, it was viewed as very stressful trying to re-book flights for the summer or claim for refunds.

"We went to Poland for someone's wedding in early March 2020, just before COVID, literally. The bride and groom had to come back but they really struggled to get back, they were on their honeymoon, they had to cut it short." Female, person of reduced mobility."
Reduced flying during the pandemic

"We were on holiday during the pandemic, when we got a message to say, 'You're having to come home early,' which was rather concerning because we thought, 'What do we do?' but we were able to call the holiday company and they got everything sorted out."
Reduced flying during the pandemic

"We booked a flight but we couldn't go out to Italy to see one of our students that had been staying with us, but they wouldn't refund us our money. We needed too much evidence to prove that we've booked the flight, so we didn't get that money back."
Did not fly during the pandemic

Savanta:

As the pandemic progressed many were nervous about flying due to unknowns about transmission and other passengers COVID-status

There was a noticeable decline in the number of flights and many flights that were operating were very quiet. Those that were flying at this point were most likely to be either for business out of necessity rather than leisure.

Initially there was anxiety with regards to flying, particularly among vulnerable consumers/those who needed to shield. Main causes of concern were the unknowns of the virus and it's severity, prolonged mask wearing on a flight and the unknowns of isolation upon return and a general fear for their own safety. There was particular concern about those that were asymptomatic onboard flights.

The rules of travel were strict which meant additional research during the booking phase, a mix of visiting domestic Government websites and destination Government websites to ensure up to date knowledge of restrictions and paperwork / proof of testing that was required. Many note that there was a uptick in the desire to remain in the UK on staycations.

"I went to the best of places, the FCOS website. The Foreign Commonwealth, I'm not actually sure of the acronym, but it's the government website that tells us all the requirements for which country you've got to go to. Well, there is a certain element of doubt. You know, don't get me wrong, I've checked it, and I've checked it again. You know, I haven't just looked at it and said that's it, I don't need anything for, to go to the Czech Republic, but I do keep checking it. I think we've got everything."
Reduced flying during the pandemic

Savanta:

The vaccine rollout was one of the pivotal points, giving some the confidence to fly. Despite unknown risks, there was something to protect 'me'

At this point, the main barrier switches to being the bureaucracy and hassle of preparing so that they can be confident the flight will run smoothly, especially when the vaccine had been rolled out more widely.

As more people were vaccinated, flyers felt happier to take more calculated risks with flying, especially if they knew that they themselves had taken necessary precautions to minimise any possible risks. Many have said that there were (and still are) additional layers of planning that can also mitigate risks, for example, taking a credit card away should flights be delayed or isolation required.

In addition at this time people were starting to have more visibility on COVID, with increasing numbers catching the virus and successfully recovering, the associated risks were starting to reduce.

At this point flying was seen as more of a necessity rather than leisure. Flying at this time was driven by those with a need to see family, or those within older age groups that were more keen to resume their normal flight behaviour.

Savanta:

Confusion was sparked by the traffic light system. Those with a greater need to fly were nervous about 'getting it right'

- The traffic light system presented a major pain point and caused lots of frustration and confusion, many felt it was not to be a practical to keep flying, rules were hard to understand and follow at this time.

- There was a feeling of nervousness, would passengers be carrying the correct documentation, would they have their plans cancelled last minute, would they be accepted on a flight or turned away at the airport?

- There was a lower expectation of social distancing, particularly once onboard, although, still a high awareness of recirculated air on flights and those that were coughing (based on previous experience of increased chances of getting a cold when coming back from holiday). However, the hands, face, space messaging resulted in an expectation that high levels of hygiene were maintained, both in the airport and when onboard a flight.

"The traffic light system, I think, just caused a lot of unnecessary confusion for such a long time, and, as much as I love going away, and we were desperate to get away last year for a break, it did kind of put us off for a while because nothing was every clear, and everything just kept changing so rapidly."
Did not fly during the pandemic

They can't really social distance you and although I'm taking a mask, I believe I don't need one now. To me, it's very hard to, it must be the hardest place in the world to protect people from COVID in an aircraft. It's definitely a unique environment, isn't it?
Reduced flying during the pandemic

There has been lots of negativity in the media recently which is resulting in a mixed reaction from consumers

There are lots of news stories about flights being cancelled. There is a perception that this experience getting worse even among 'trustworthy' airlines that are considered to be reputable. The wide-spread cancelling of flights creates some nervousness about booking flights and holidays as there are memories of uncertainty about the refund policies that they may receive (vouchers or date changes).

The majority of passengers that we spoke to shared articles including lots of chaos in airports, mainly through extended queue times as there are now fewer staff members in the airports to get customers through check in and security. However, when reflecting on this theme in the news, there is an awareness that these are potentially snap shots in time, and a hope that their own experiences may well differ when they get to the point going to the airports / it might not be the same at the airport they visit.

"All I'm really seeing is just staffing issues really. Whether that be at the check-in desk or security or boarding gates, that kind of thing. And then I have seen, again, a couple of flights being cancelled because of staffing issues again. See I think it's just a knock-on effect as a whole and obviously now you've got holiday season as well haven't you?"
Did not fly during the pandemic

"I've really heard from a wider perspective is the whole chaos at the airport thing. Which, luckily, we avoided. Although, I'm flying from Birmingham at the end of the month and that queue, they are queueing like you wouldn't believe out the doors. So I'm a bit worried about flying from Birmingham to be fair."
Reduced flying during the pandemic

Savanta:
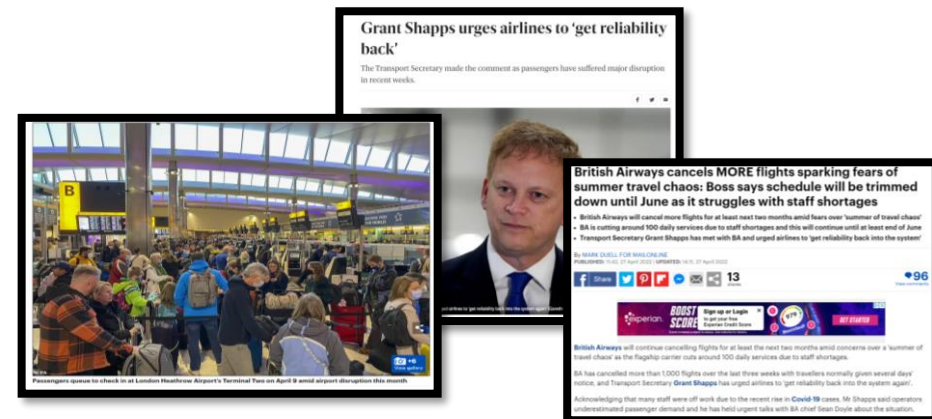
Many are only now finding out that assistance is available for them

Having flown less over the past couple of years, and with new sources of anxiety such as close contact in the airport, many people are viewing the hassle of navigating through the airport as being too difficult. While many were already using passenger assist, others with what they would consider more minor disabilities, are only now aware that they are eligible for support.

More people are becoming aware through word of mouth that this is available for a wider range of conditions than they previously thought, such as hearing loss or chaperoning people travelling with children with a disability. While this results in vulnerable groups feeling less anxious about air travel, the additional demand may stretch an already thin workforce.

"We don't get assistance because she's in a wheelchair but I have to push it, she won't let a stranger push it. It would be good to have somebody who almost acts as a chaperone, so you push the wheelchair but they walk alongside you. If you're pushing the chair and you've got a few bags of luggage, and a disabled child, it would be nice to have some help, but I've never come across that."
Has two young disabled children

[*In response*] "If you ask them for special assistance, they will carry your suitcases and all that until you're checked in and then help you to the plane like a chaperone while you push the wheelchair, I've had friends do that. Not many people know what's available, it's the same for my hearing aid, I phone them now, but it was only about 4 years ago I was told about [the support available]."
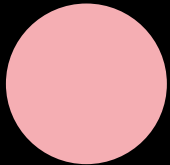***Uses passenger assistance for mobility and hearing loss***

Savanta:

Contact information
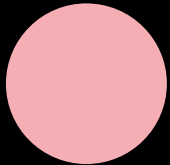
James Rentoul
Director
James.Rentoul@savanta.com

Helena Page
Associate Director
Helena.Page@savanta.com

Harry King
Senior Consultant
Harry.King@savanta.com

Zoe Taylor
Senior Consultant
Zoe.Taylor@savanta.com

Lily Clark
Research Executive
Lily.Clark@savanta.com

Savanta:

Savanta:
Make better decisions