UK Aviation Consumer Survey

Wave 11 (Autumn 2022)

Final report by Savanta

Classification: Public

Contents

Background

The Civil Aviation Authority (CAA) has re-commissioned Savanta ComRes, an independent research organisation, to conduct the eleventh wave of its 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 is 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.

It is important to understand results from the last few waves in their proper context with respect to COVID-19; changes in metrics such as satisfaction and propensity to fly should both be understand in the following context:

Wave 8 11th Oct – 5th Nov 2019	**Wave 9** 13th Nov – 8th Dec 2020	**Wave 10** 22nd Sept – 21st Nov 2021	**Wave 11** 10th Oct – 31st Oct 2022
COVID-19 not present	No vaccine roll out Lockdown restrictions (UK second lockdown) until 2nd December 2020	Vaccines available nationwide No national lockdowns Alpha, Beta, Gamma and Delta variants existent (Omicron emerges shortly after fieldwork)	UK population widely vaccinated* No national lockdowns and restrictions eased

* According to GOV.UK, 53.8 million have received a first dose as of 30th October 2022, which amounts to about 80% of the UK population. Around 50.8 million have received a second dose, which amounts to around 75% of the UK population.

Methodology and sample profile

During the fieldwork period of 10th – 31st October 2022, a total of 3500 interviews were conducted, with 3000 of these being online and 500 conducted via telephone.

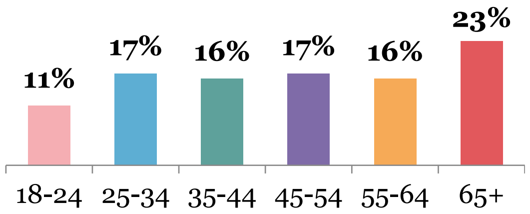
The sample was recruited according to ONS estimates for gender, age, region and working status to ensure that the sample is demographically representative of the UK, and data were then weighted by these factors to address any small discrepancies between the quotas set and sample achieved. The profile of the weighted sample is shown below.

Gender

Female
51%

Male
49%

Age



Regions

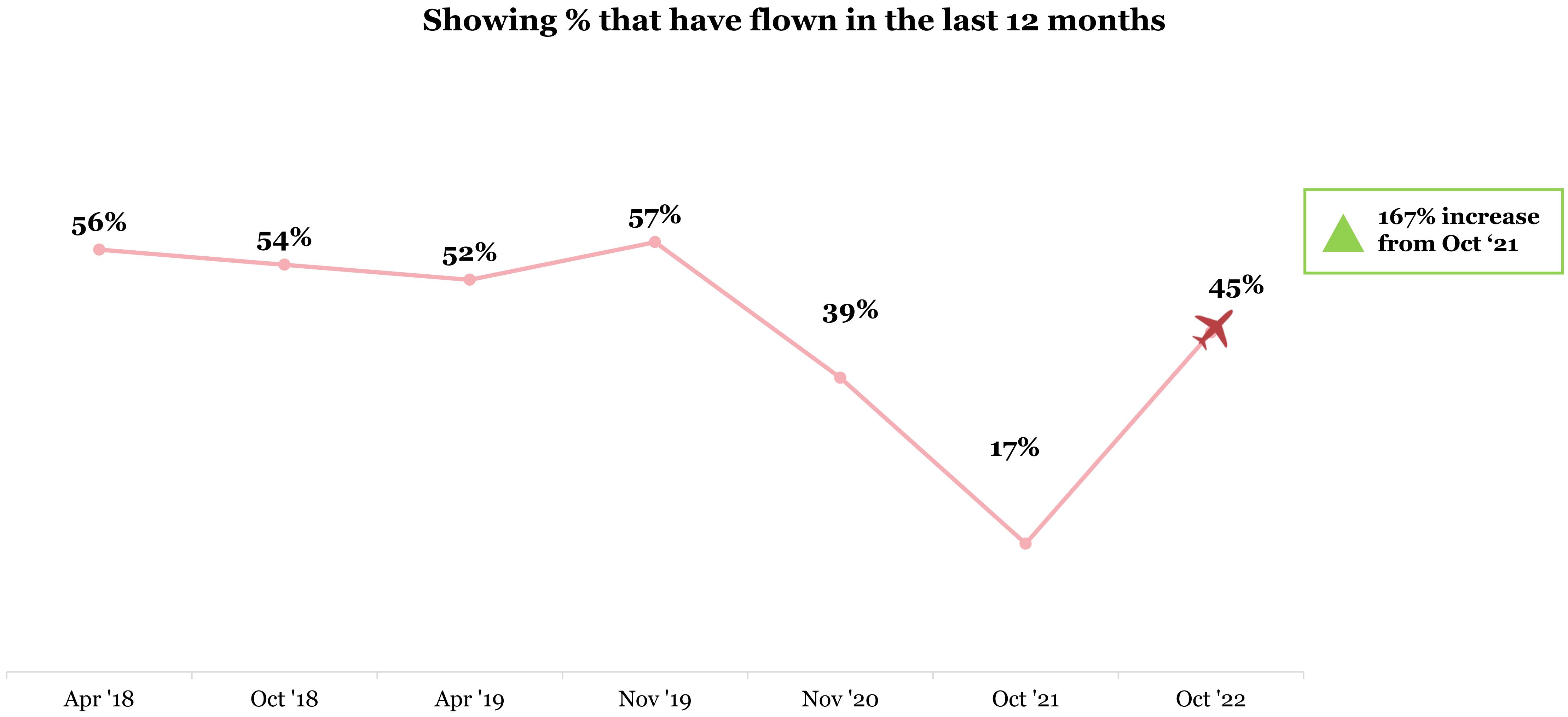
Recruited and weighted based on ONS population figures for each of the 9 English regions, plus Scotland, Wales and Northern Ireland

Working status

Full time	41%
Part time	17%
Not working	42%

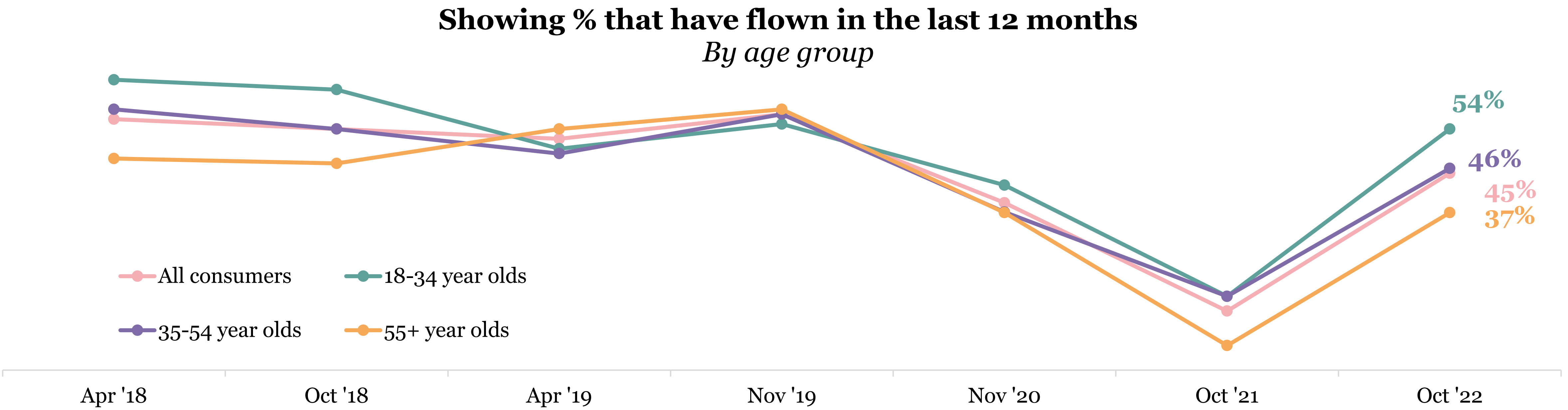
Headline measures

The proportion of consumers flying in the last 12 months has risen significantly, though remains below pre-pandemic levels



Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Base: All respondents (n=3,500 in Oct '22)

The flying behaviour of under 35s is quickly returning to pre-pandemic levels; this is much slower for older adults

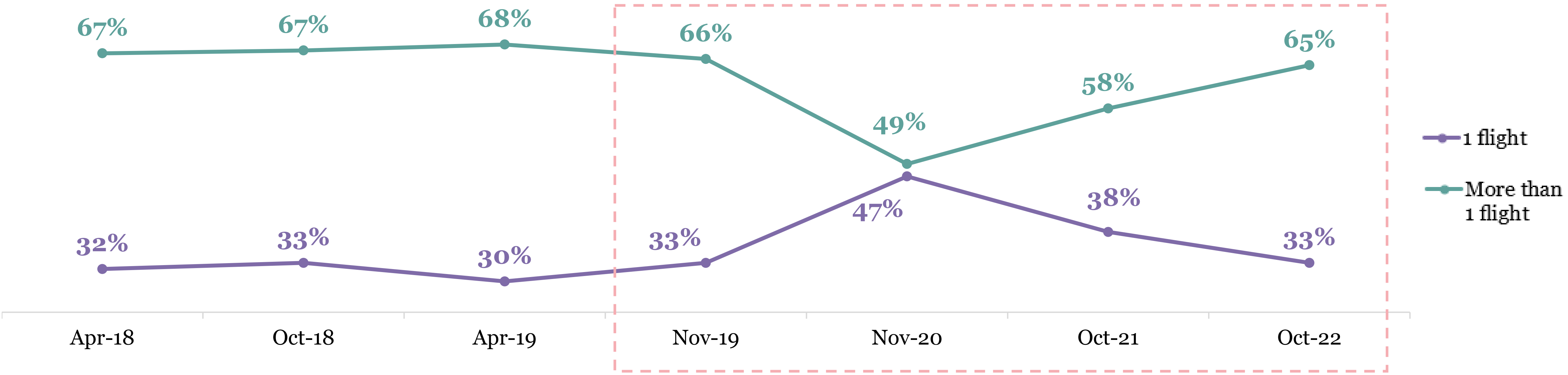


Younger consumers are significantly more likely to have flown in the last 12 months, with over half (54%) of 18-34 year olds having flown in the last 12 months (compared to 46% of 35-54 year olds and 37% of those aged 55 and over). The proportion of 18-34 year olds who flew in the past 12 months is 54% this wave is higher than the 50% recorded in April 2019, underlying how **flying has re-bounded to pre-pandemic levels among under 35s**. Those in **older age groups remain far less likely to say they have flown in the last 12 months than in November 2019,** suggesting that the pandemic has had a more significant and lasting impact on older consumers' attitudes.

Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Q21.12. Please tell us to what extent you agree or disagree with this statement: The COVID-19 pandemic has negatively impacted my perception of flying. Base: All respondents (n=3500 in Oct '22), including 18-34 year olds (n=966), 35-54 year olds (n=1,138), and 55+ year olds (n=1,382).

Flight <u>frequency</u> appears to be returning to pre-pandemic levels amongst those who have flown in the last 12 months

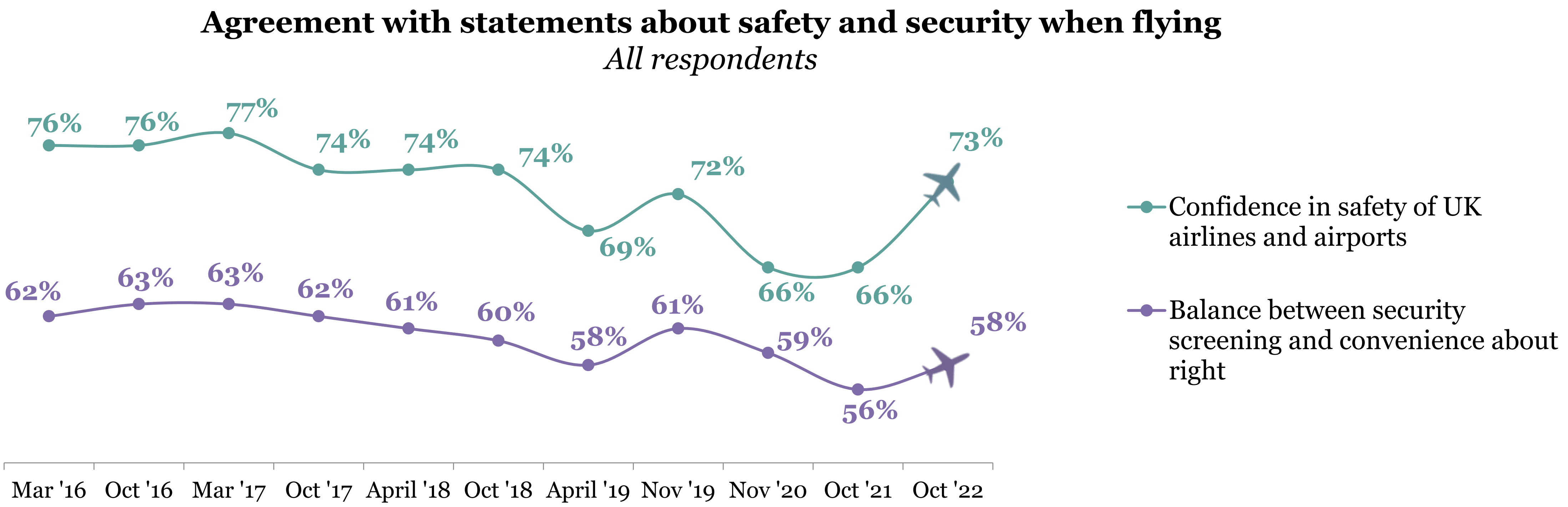
Number of flights in last 12 months – showing those taking 1 flight vs. more than 1 flight
Tracked since Apr 2018
All those who have flown in the last 12 months



Many of those who continued to fly during the pandemic still flew less frequently than they ordinarily would, with half of recent flyers in November 2020 saying that they only flew once in the previous 12-month period (47%, compared to 33% in the prior wave). Since then, flight frequency amongst recent flyers has steadily returned to pre-pandemic levels, with the proportion of recent flyers who flew more than once in the last 12 months rising for the last two waves. **This wave, that figure is level with the figure observed in November 2019 (65% vs. 66% in November 2019), further supporting the finding that consumers are returning to a 'normal' pattern of flying behaviour.**

Q2. 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 respondents who have flown in the last 12 months (n=1,559 in Oct '22).

Consumer confidence in the safety of UK airlines and airports has returned to pre-pandemic levels



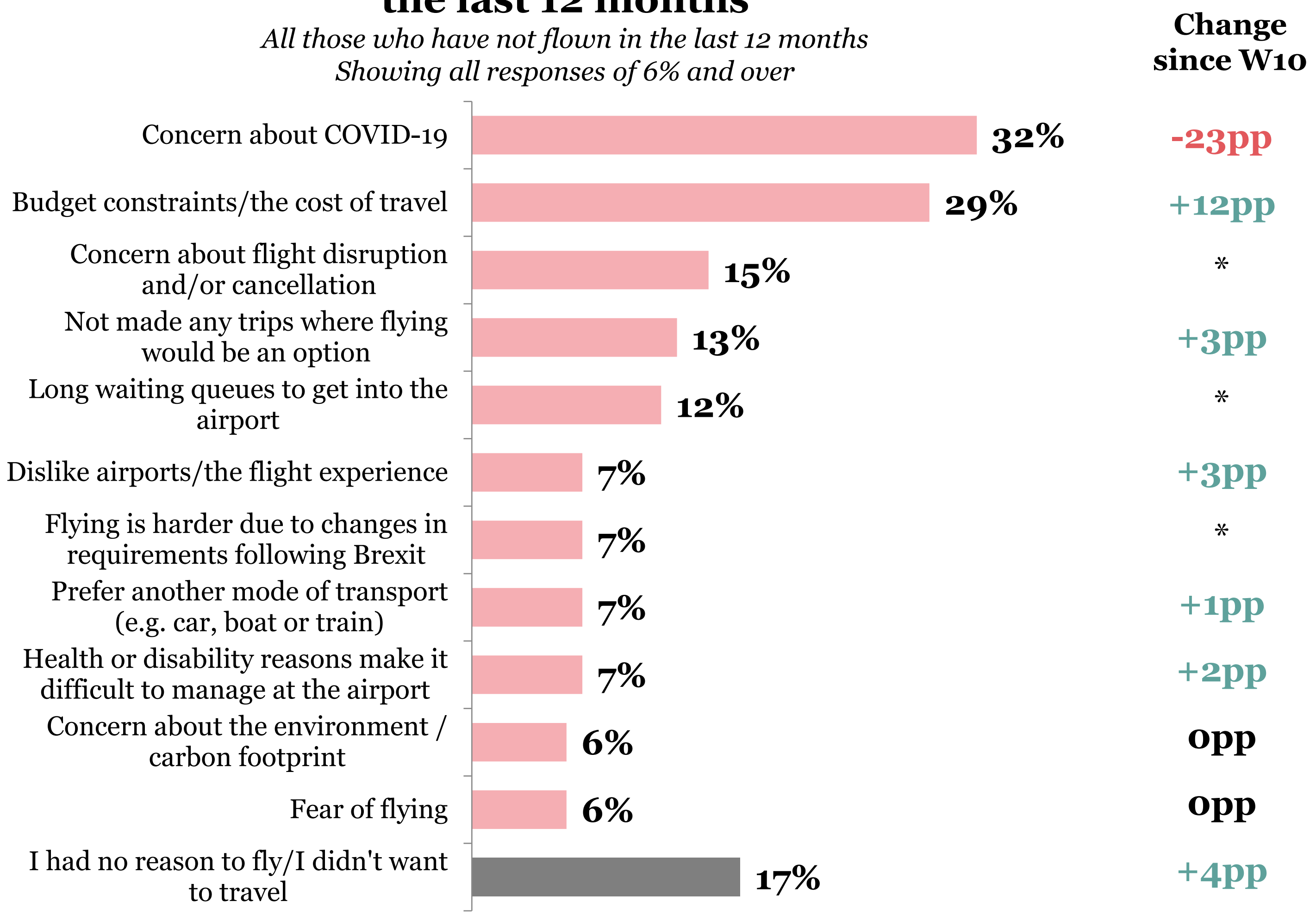
3 in 4 consumers say that they have confidence in the safety of UK airlines and airports (73% agree), in line with the levels of agreement recorded pre-pandemic, suggesting that safety concerns around COVID-19 have diminished overall. However, disabled passengers are twice as likely to disagree with this notion than non-disabled passengers (12% vs. 6%), indicating that this group still require reassurance necessary precautions are still in place.

Q21. 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=3,500).

Concern about COVID-19 has diminished significantly as a barrier, with budget constraints increasingly cited amid the cost-of-living crisis

Barriers to flying amongst those who have not flown in the last 12 months

All those who have not flown in the last 12 months
Showing all responses of 6% and over



The proportion of consumers citing concern about COVID-19 as a barrier to flying has fallen markedly since October 2021, but it remains the most prevalent barrier at 32%, showing that the pandemic has had a lasting impact on consumer attitudes. As was the case during the pandemic, **those in older age groups are significantly more likely to cite this as a barrier** (38% amongst 55+ vs. 24% amongst 18-34).

Conversely, **younger people are significantly more likely more to cite budget constraints as a barrier to flying**, with 18-34 year olds and 35-54 year olds almost twice as likely to identify this as a reason they have not flown recently than those aged 55 and over (36% and 38% respectively vs. 20%).

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=1, 941). *These options were new inclusions in this wave and so no tracked data is available.

Flight disruption is also a significant concern for consumers this wave, and the proportion experiencing it has grown

Disruption is more common than ever amongst recent flyers

61%

of recent flyers* said they experienced some kind of travel issue, **the highest proportion since tracking began.**

Younger recent flyers are significantly more likely to report experiencing some kind of travel disruption (70% of 18-34 year olds vs. 61% amongst 35-54 and 51% amongst 55+).

PRM (disabled passengers) are significantly more likely than non-disabled passengers to report travel issues on their most recent flight (71% vs. 59%).

Concern about disruption is the third most widely cited barrier to flying

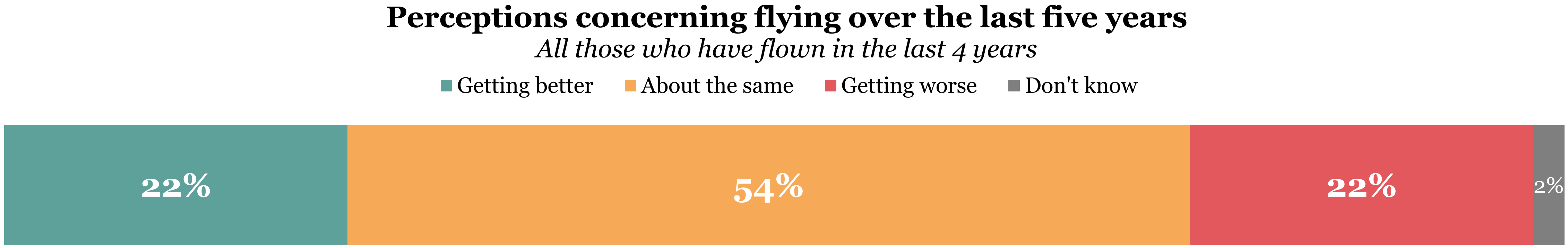
15%

of those who *have not* flown in the last 12 months cited concern about disruption as a reason, **making it the third most prevalent barrier.**

Older consumers are significantly more likely to cite concern about disruption as a reason they have not flown recently. 1 in 5 of those aged 55+ who have not flown in the last 12 months say this (20%), a significantly higher figure than the equivalents for those aged 35-54 (13%) and 18-34 (9%).

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=1,941). Q26. During your most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=1,558).
*Those who have flown in the last 12 months.

Age and income are again dividing lines when it comes to perceptions concerning whether flying has got better or worse over the last five years



Age: Under 35s are significantly more likely to say the experience of flying has improved, whereas those aged 55 and over and significantly more likely to say it has got worse.

Income: Those with an annual household income of over £50,000 are significantly more likely to say that flying is improving than those with a lower income (25% vs 21%).

PRM: Disabled passengers are significantly more likely than non-disabled passengers to say flying is improving (30% vs. 20%).

Disruption: Recent flyers* who experienced an issue on their last trip are over twice as likely to say the experience of flying has worsened (28% vs. 12% amongst those who didn't experience issues).

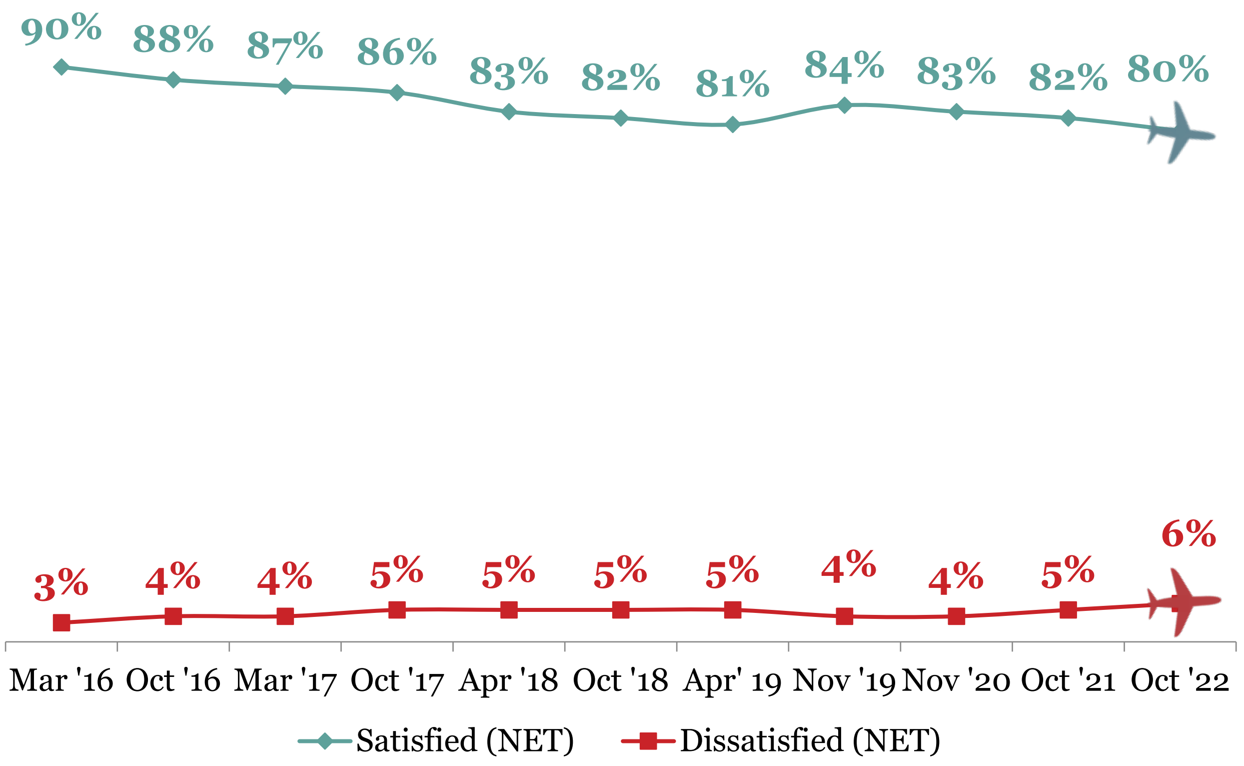
Q4. Thinking about your experiences of flying over the last five years, would you say that flying is:. BASE: All who have flown from the UK in the last 4 years (n=2,477).
*Those who last flew within the last 12 months

Satisfaction measures

Satisfaction with the overall travel experience remains fairly stable, but has seen a slight decline over the last three consecutive waves

Last flight: Overall satisfaction

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



Whilst satisfaction at an overall level has only slightly declined, **the proportion of consumers saying they are 'very satisfied' with the overall travel experience has fallen considerably** (39% in October 2021 to 29% this wave).

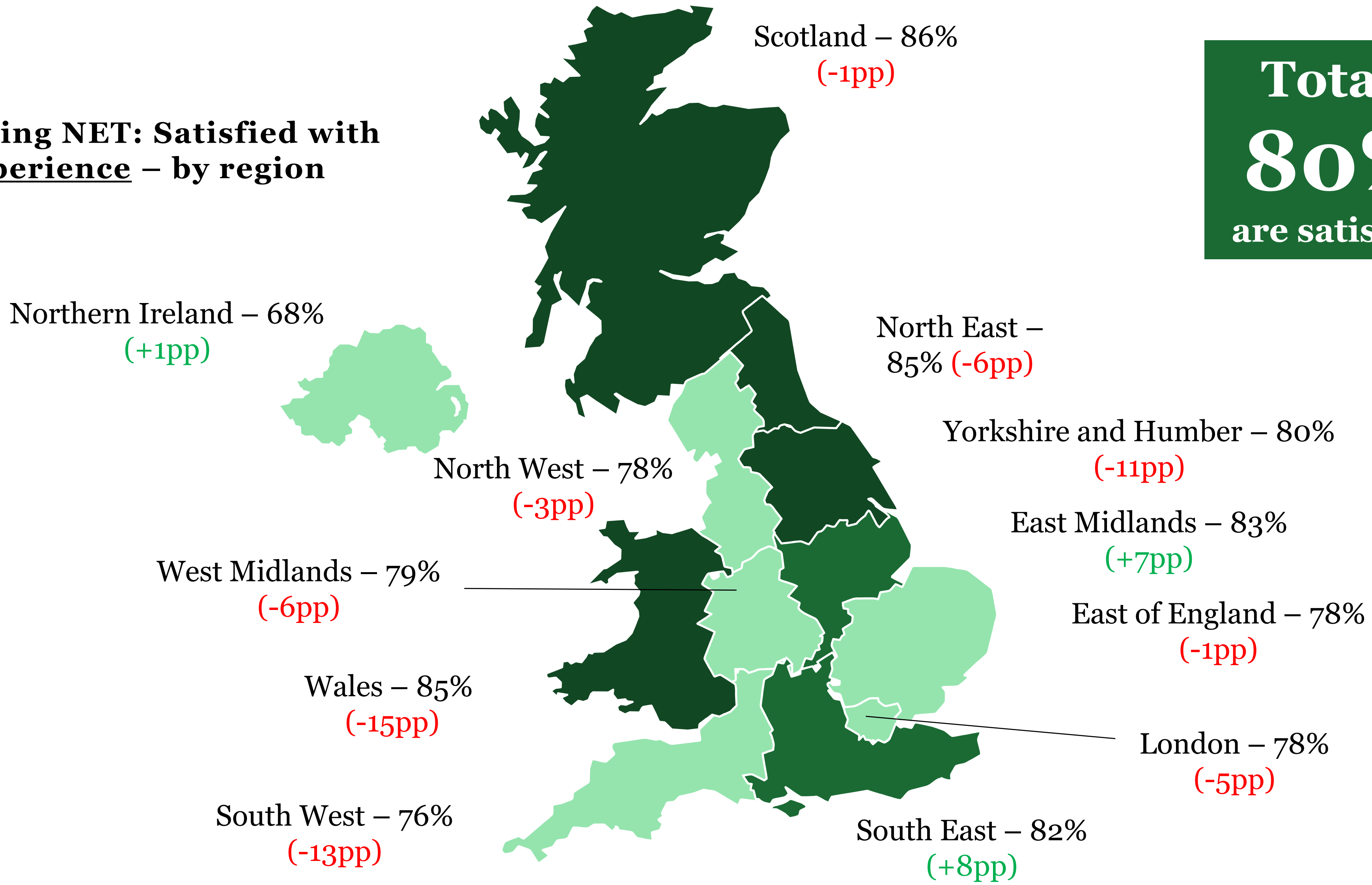
Unsurprisingly, **those who experienced travel issues or disruption on their most recent flight are significantly less likely to be satisfied** with the overall travel experience than those who do not (73% vs. 89%).

Those who required assistance for themselves or for others are also slightly less likely than average to be satisfied (78% and 76% respectively).

Q23.17. The overall travel experience: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,553)

Recent flyers from Scotland, Wales and the North East are most likely to be satisfied with the overall travel experience

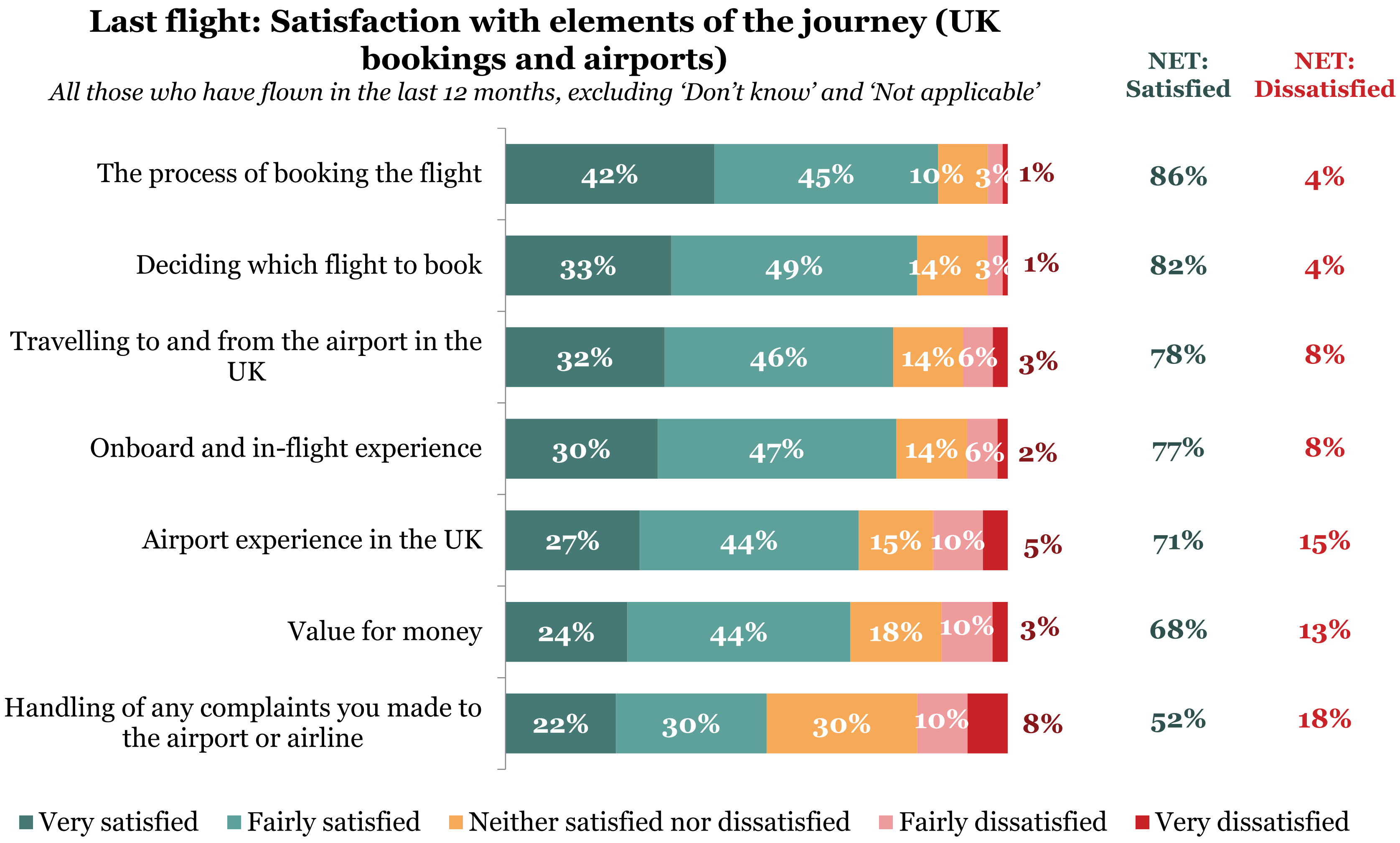
Last flight: Showing NET: Satisfied with <u>overall travel experience</u> – by region



Total: 80% are satisfied

Q23.17. The overall travel experience: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,553)

The booking process remains the area of most widespread satisfaction, with value for money and complaint handling areas for concern

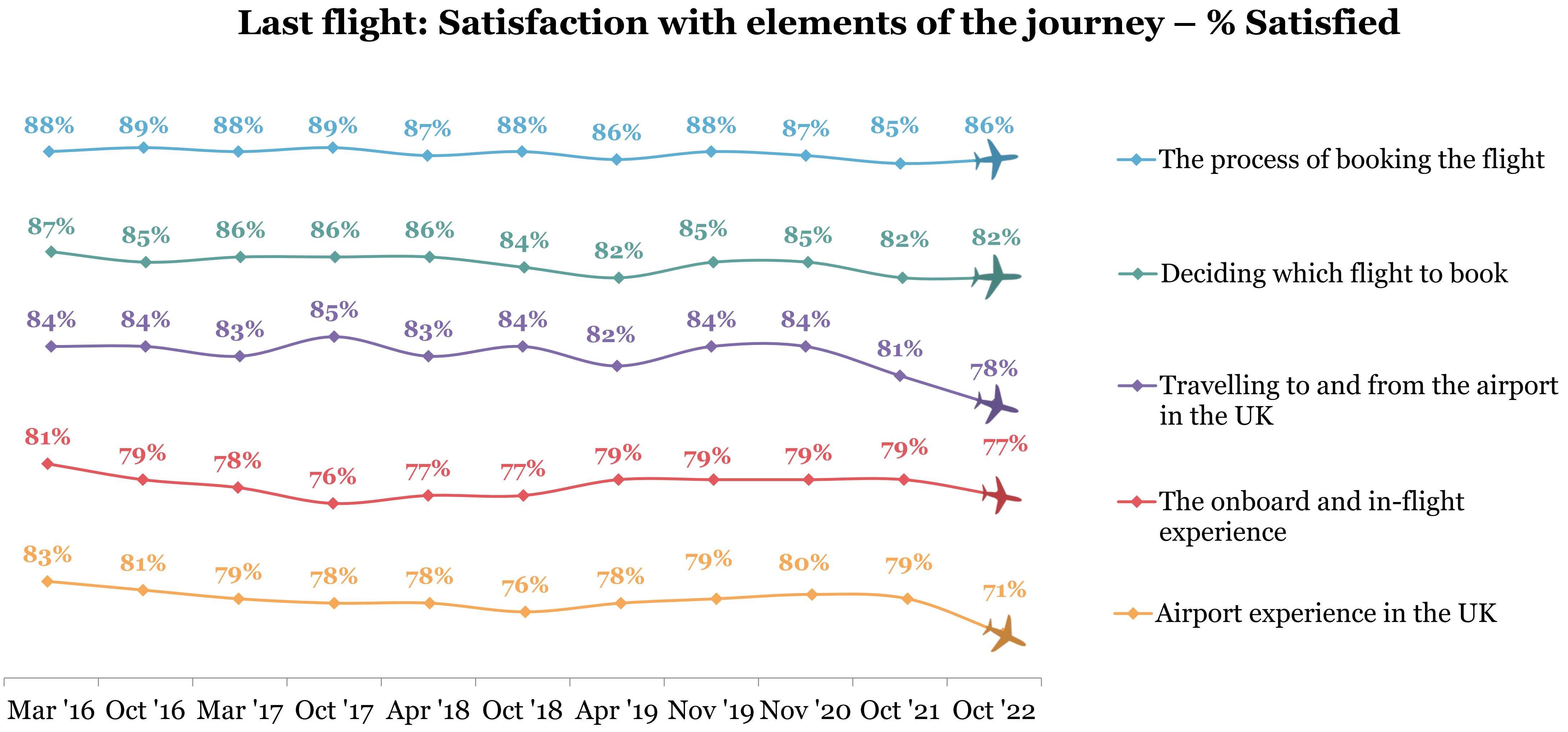


Satisfaction with elements of the journey varies with age. Consumers aged 55 or over are significantly more likely to be satisfied with the booking process, choosing a flight, and the journey to and from the airport, and less likely to be satisfied with the airport experience and complaints handling.

Digital confidence bears significantly upon satisfaction with deciding which flight to book, with 4 in 5 (83%) consumers who are confident using electronic devices satisfied with this, compared to just two thirds(65%) of consumers who are not confident doing this.

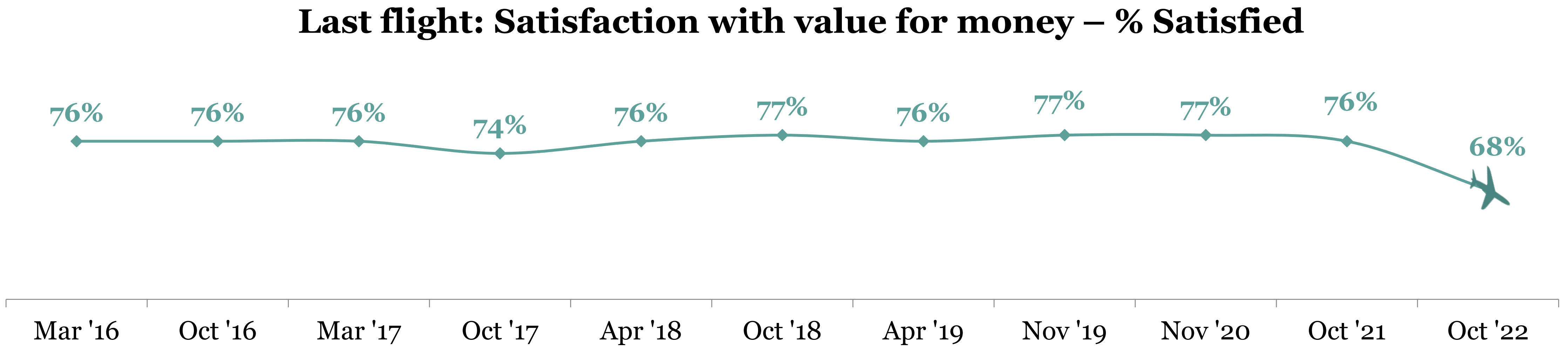
Q22. SUMMARY: How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 814-1,549)

Satisfaction with travel to the airport and the airport experience in the UK has declined



Q22. SUMMARY: How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1520-1549)

Satisfaction with value for money has also declined sharply, perhaps driven by the rising cost of living and widespread airport disruption



The impact of the rising cost of living is clear to see: those who say the rising cost of living has impacted them financially are twice as likely to be dissatisfied as those who say the rising cost of living has had no impact on them (18% vs. 9%).

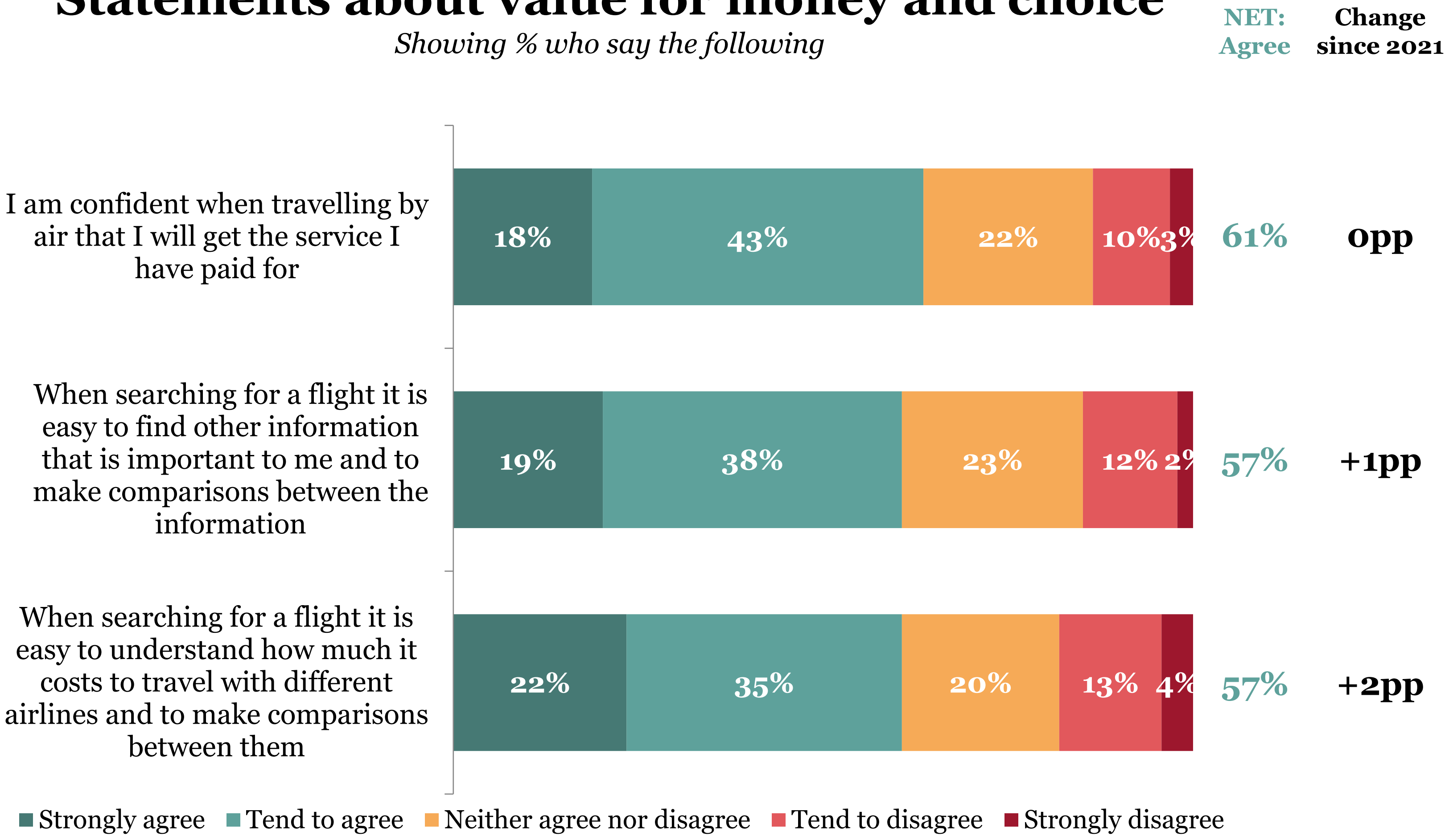
Disruption is also a key factor, as those experiencing a travel issue are over twice as likely to be dissatisfied with value for money (17% vs. 8%). The increasing number of consumers have been affected by disruption has likely contributed to the declining level of satisfaction with value for money.

Q22.6. Value for money: How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n= 1,542)

In line with 2021, the majority of consumers find it easy to weigh up relevant information when searching for a flight, and are confident they will get the service they paid for

Statements about value for money and choice

Showing % who say the following

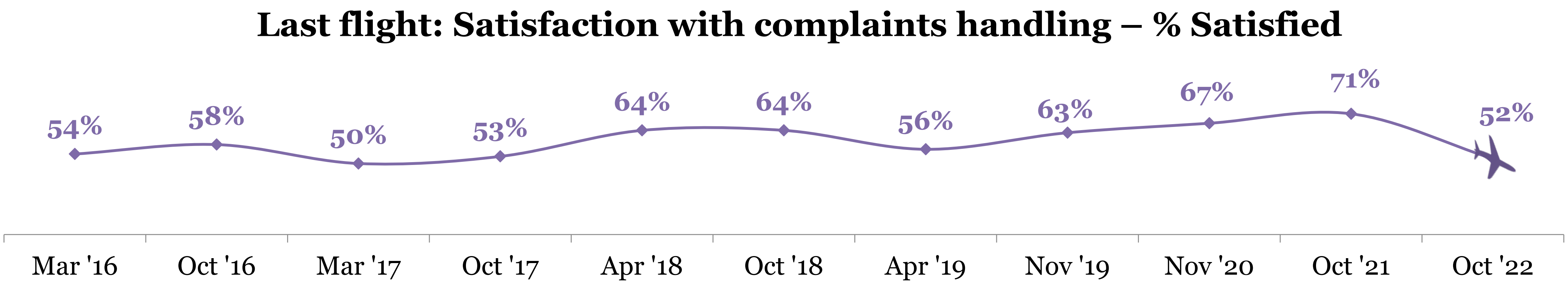


Though consumers are no less confident that they will get the service they paid for when flying than they were last year, this metric cannot be entirely separated from the rising cost of living. **Those who have been impacted by the rising cost of living are significantly less likely to be confident** in this that those who have not (59% vs. 64%), and those with a lower annual household income are also significantly less likely to be confident (59% amongst those with an income below £50,000 per year vs. 67% amongst those with a higher income).

Those in this higher income bracket are also significantly more likely to agree that it is easy to find the information to be able to compare flights. This is important, as it means that **those who are more likely to need to save money on flights feel they are less equipped to gather relevant information.**

Q21. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3,500)

Satisfaction with complaints handling also sees a significant decline, though not amongst older consumers



The greatest decline in satisfaction since last wave was amongst younger age groups, with a 16-percentage-point drop in satisfaction amongst 18-34 year olds and a 24pp drop amongst 35-54s (compared to a decline of just 2pp amongst those aged 55 and over). That said, satisfaction continues to be much higher amongst these younger groups than amongst consumers aged 55+ (57% satisfied amongst 18-34s and 51% amongst 35-54s, vs. 44% amongst those aged 55 and over).

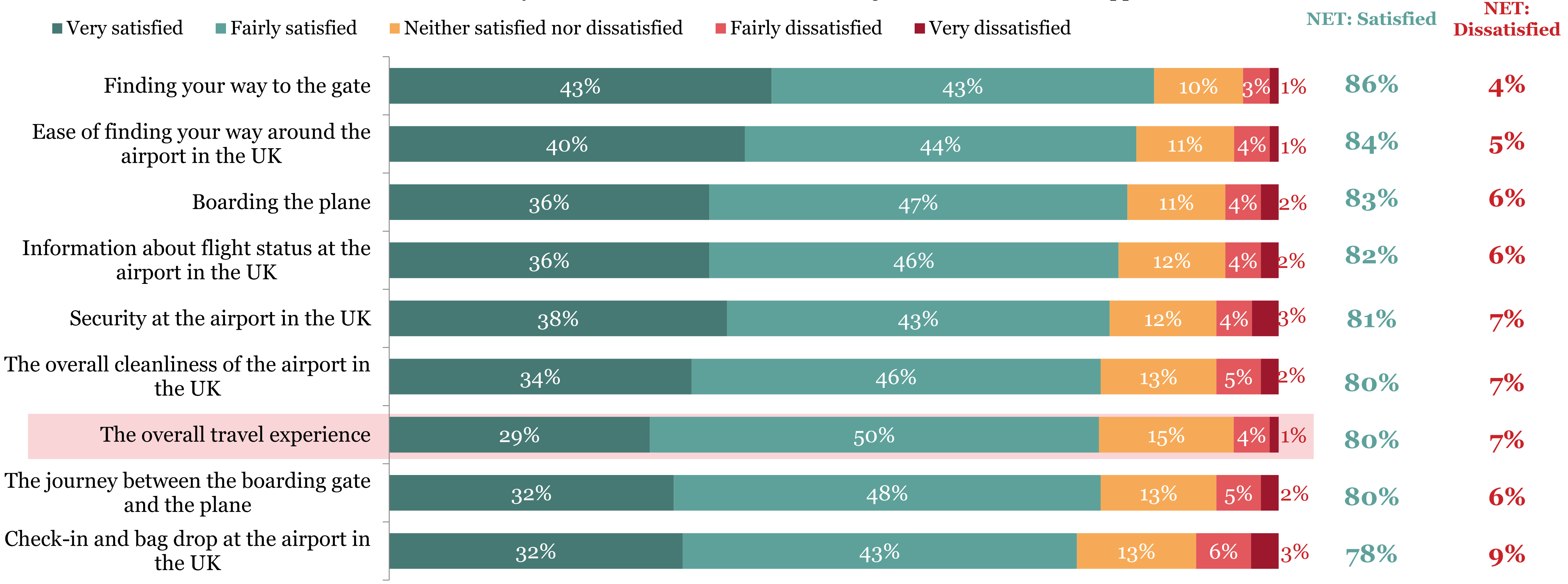
Dissatisfaction with complaints this wave is particularly high amongst those flying from Gatwick (28% dissatisfied, vs. 18% on average). News stories about staff shortages leading to a backlog of flights at Gatwick were widespread earlier in the year, so complaint-handling dissatisfaction may in part reflect dissatisfaction with the explanation given for delays.

Q22.7. Handling of any complaints you made to the airport or airline: How satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months and made a complaint, excluding DK and NA responses (n= 814)

Navigation around the airport and to the gate are areas of particularly high satisfaction

Last flight: Satisfaction with more specific aspects of flight (UK) – Part 1

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

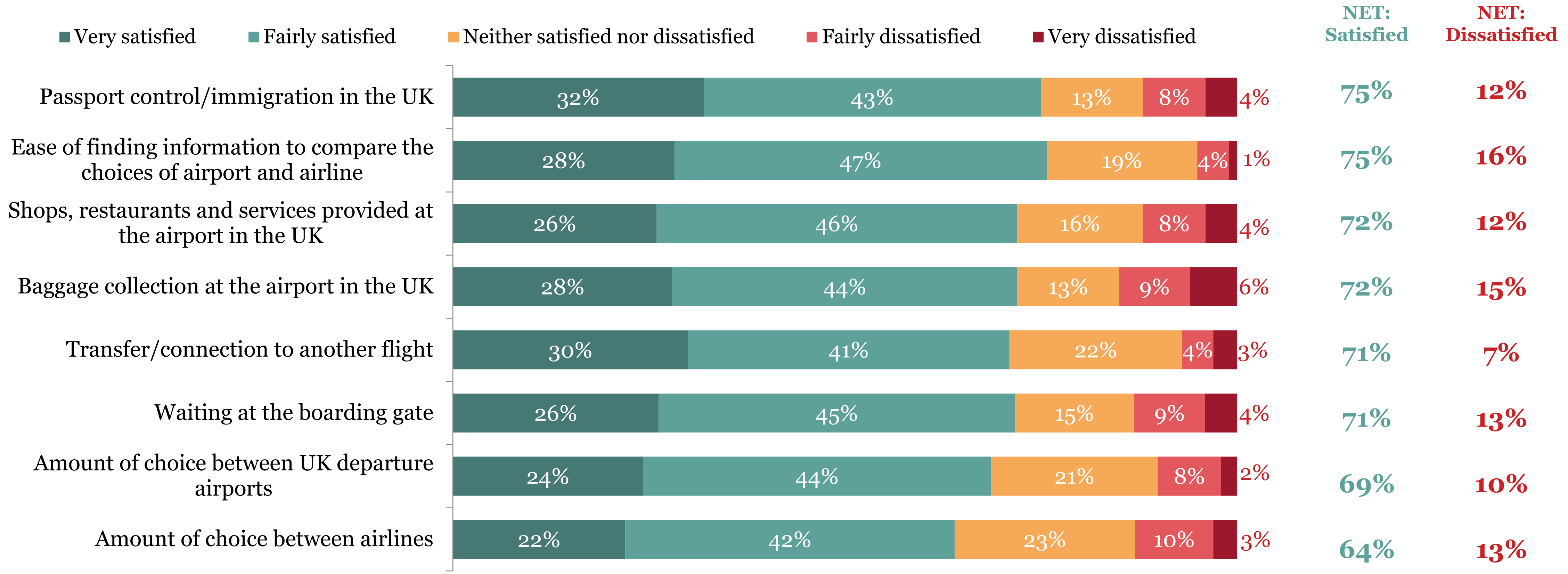


Q23. SUMMARY: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1452-1553)

Choice between UK departure airports and airlines are the flight aspects which see the lowest levels of satisfaction

Last flight: Satisfaction with more specific aspects of flight (UK) – Part 2

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

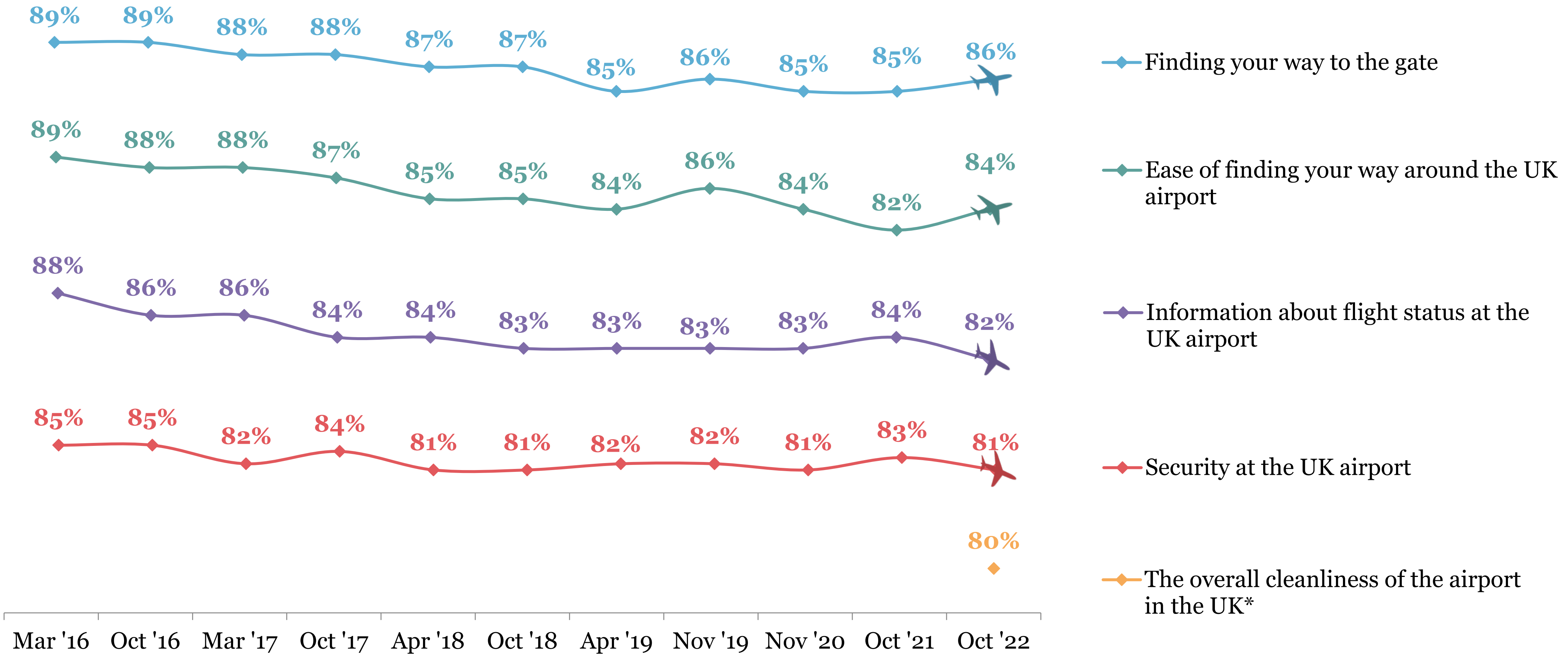


Q23. SUMMARY: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=807-1546)

Satisfaction with airport navigation increases slightly this wave, with the clear majority satisfied with its overall cleanliness

Last flight: Satisfaction with airport experience – Part 1

(% Satisfied)

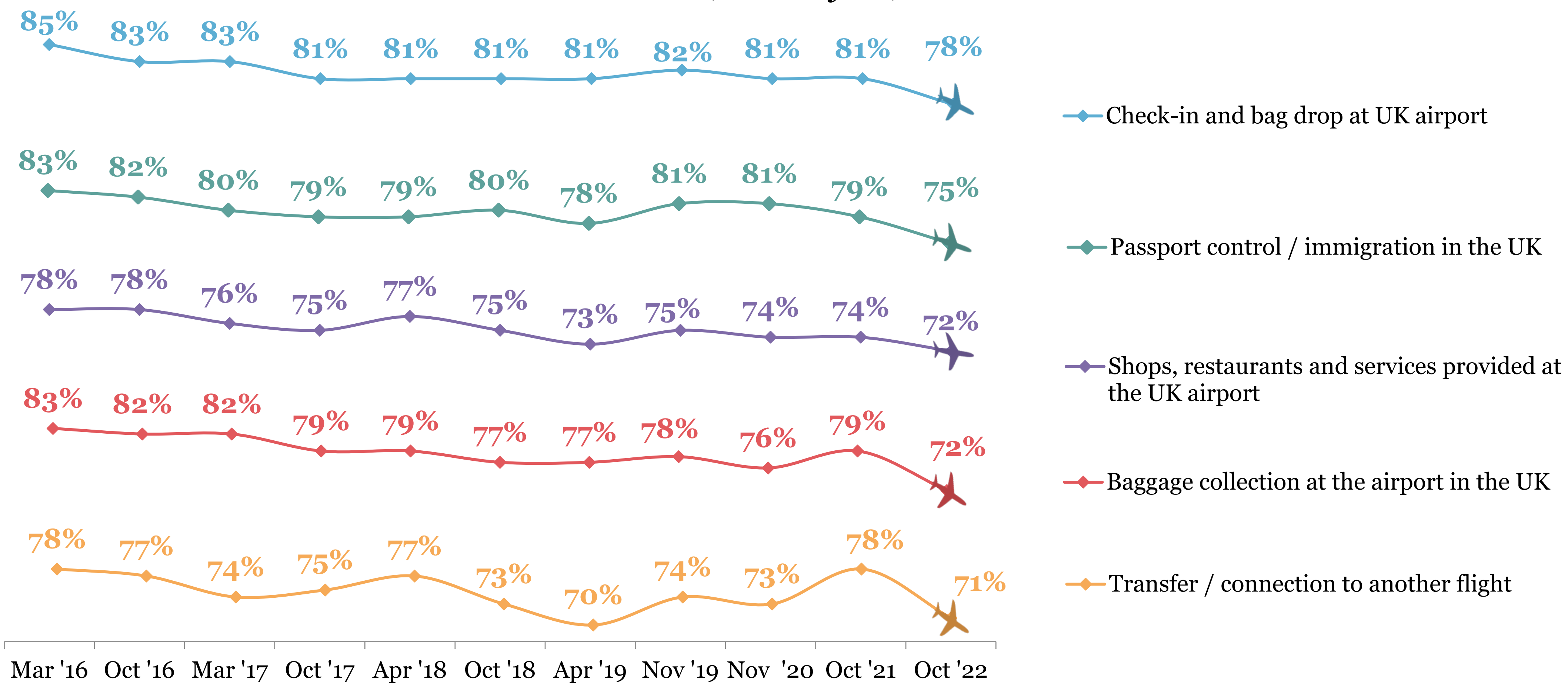


Q23. SUMMARY: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements?
Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1545-1552). *Not tested prior to the current wave so no tracked data available

Perhaps reflecting the disruption experienced this summer, passport control, baggage collection, and transfers see the sharpest declines

Last flight: Satisfaction with airport experience – Part 2

(% Satisfied)

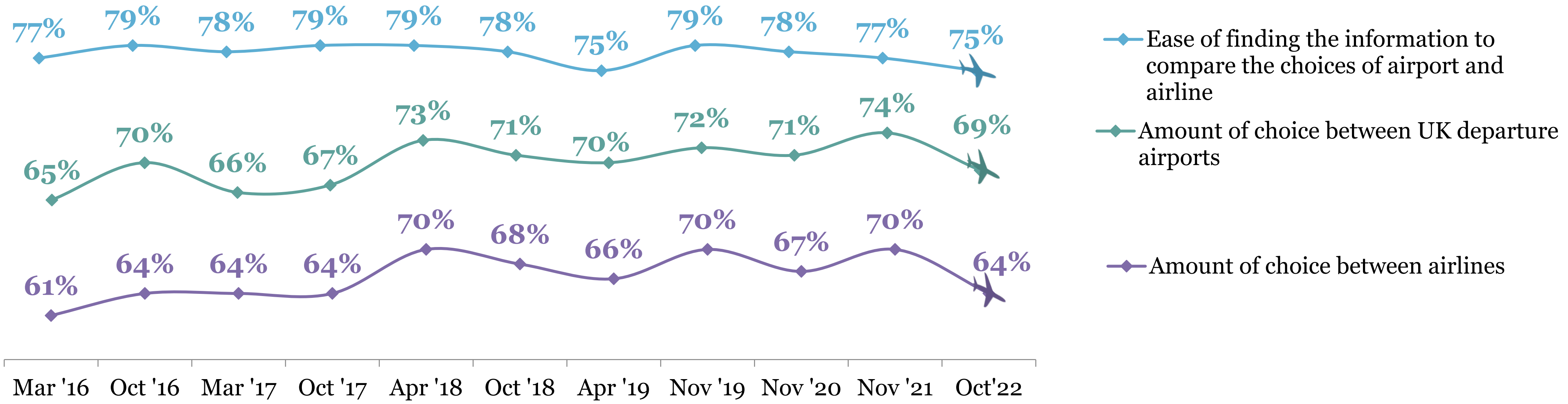


Q23. SUMMARY: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=807-1520)

All pre-booking elements also see a drop in satisfaction, with digital confidence again appearing to bear upon satisfaction here

Last flight: Satisfaction with elements of pre-booking

(% Satisfied)



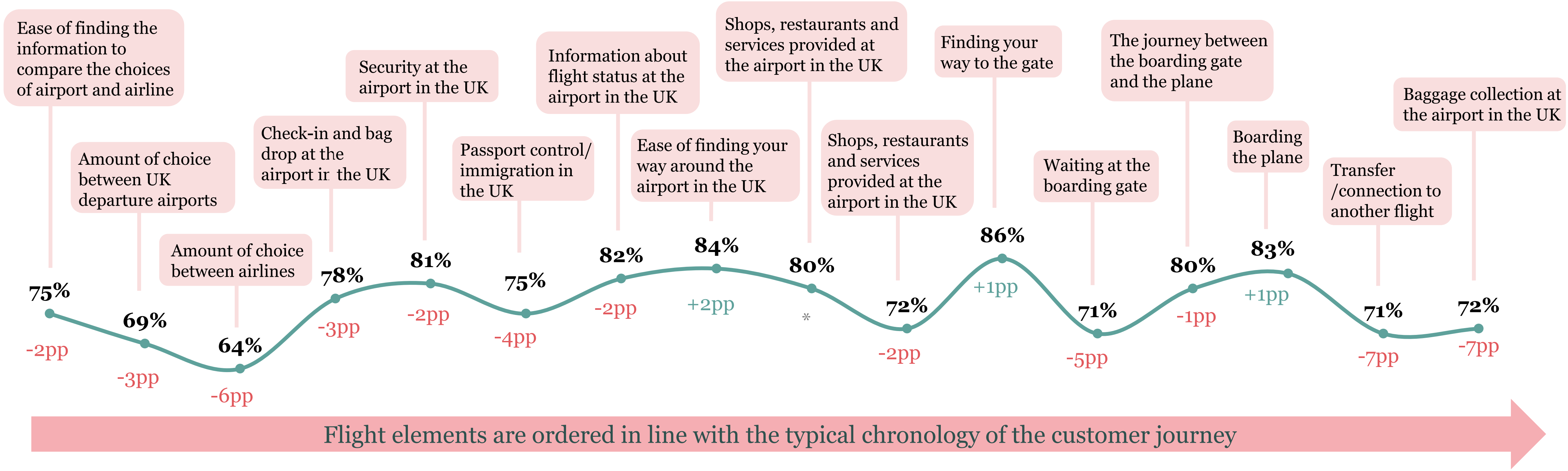
Digital confidence again appears to play a significant role here, with digitally confident consumers significantly more likely to be satisfied with the ease of finding information to compare the choices of airport and airline (76% vs. 56% amongst those who are not digitally confident), as well as the amount of choice between UK departure airports (69% vs. 55%). The strength of satisfaction has also declined, with consumers less likely to say they are ‘very satisfied’ with each area than the previous wave.

Q23. SUMMARY: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1453-1458)

Satisfaction levels remain generally high, but have dropped since last year across the majority of measures

Last flight: Satisfaction with airport experience

Showing NET: Satisfied
Changes from 2021 shown below



It is worth reflecting on the behavioural science principle of the '**peak end rule**', that consumers will judge the journey experience on its **most intense point (its peak, positive or negative), 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**.

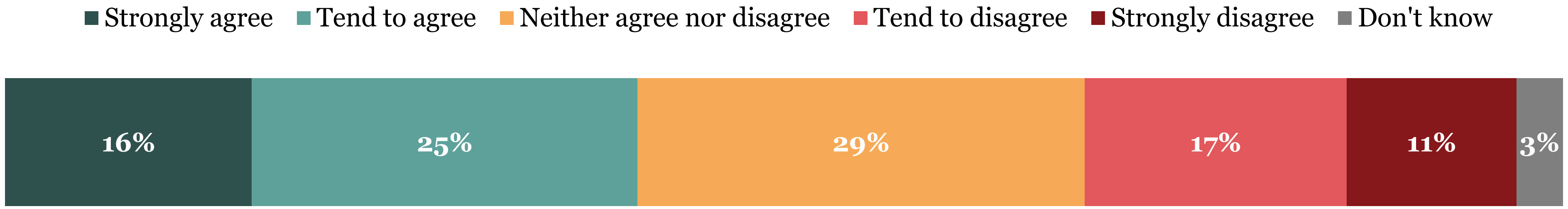
Overall travel experience

80% -2%

Q23. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All those who have flown within the last 12 months, excluding DK and NA responses (n=807-1559). *New statement for 2022 so no historical data available.

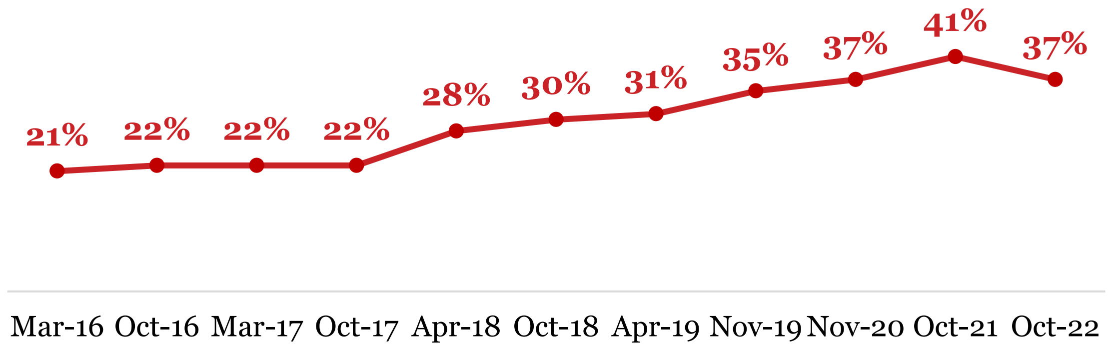
The proportion of consumers who consider the impact of flying on the environment has declined slightly, driven by higher-income consumers

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



NET: Agree	Change since 2021
37%	-4pp

When deciding to travel by air, I think about the impact of flying on the environment (NET: Agree)



Nearly 2 in 5 consumers (37%) agree that they think about the impact of flying on the environment when considering travelling by air, a slight decrease from the all-time high of 41% recorded last wave.

Annual household income seems be a dividing line here: those with an income of under £50,000 per year agree in fairly similar numbers to last wave (39% in 2021 to 37% in 2022), whereas those with a higher income agree in much lower numbers than they did last wave (48% to 38%).

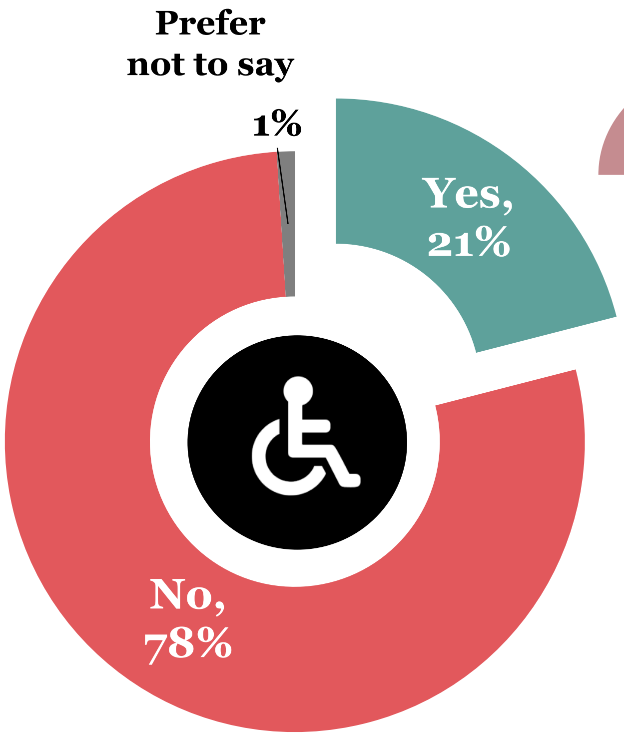
Q21.11. When deciding whether to travel by air, I think about the impact of flying on the environment: Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3,500)

Accessibility and the experience of disabled passengers

Disabled passengers who have flown recently are significantly less likely than those who have not to say they find airport and flying experience difficult

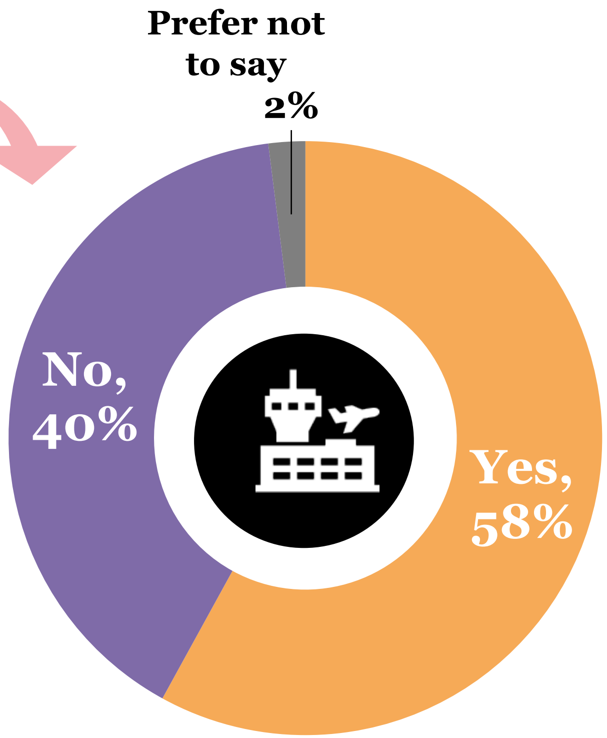
Disability/health condition

Showing % who have a disability



Difficulty in accessing/ using airports or flying

All who have a disability



Difficulty in accessing/using airports or flying (% saying yes)

48%
Last flew within the last 12 months

68%
Last flew during the pandemic but over 12 months ago

63%
Last flew before the pandemic began but less than 4 years ago

Respondents with a non-hidden disability are more likely than those with a hidden disability to experience difficulty in accessing or using airports or flying (67% vs 53%), and same is true for those with a physical disability, compared to a non-physical disability (67% vs 42%).

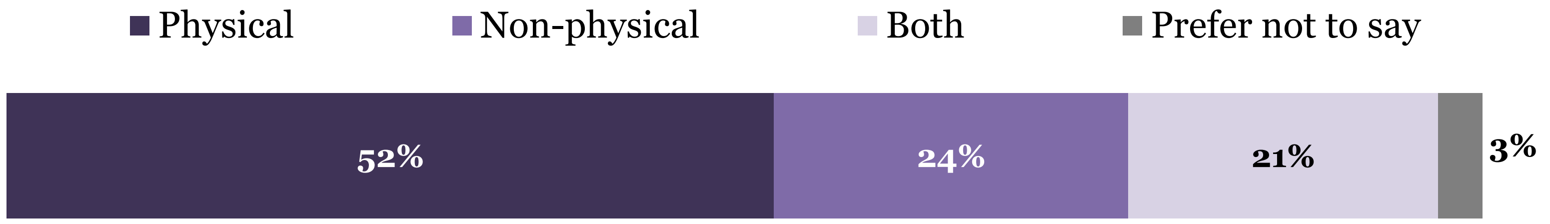
Q6. Do you have any disability or health condition that limits your day-to-day activities? It could include a physical disability or health condition. Base: All respondents (n=3500)
Q7. Does/would your disability or health condition make accessing and/or using airports or flying difficult? Base: All who have a disability (n=735)

Three-quarters of disabled respondents report having a hidden disability

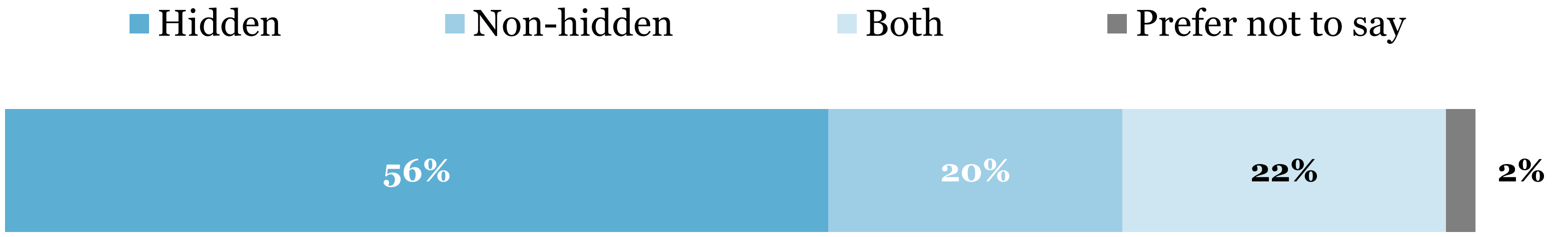
More than half (52%) of disabled passengers say that their disability is a physical one, compared to one in four (24%) who say they have a non-physical disability.

Just over three-quarters (78%) say either that they have a hidden disability or that they have both a hidden and a non-hidden disability, meaning that **the vast majority will not necessarily have their condition immediately recognised by others.**

Physical or non-physical disability
All who have a disability (online only)

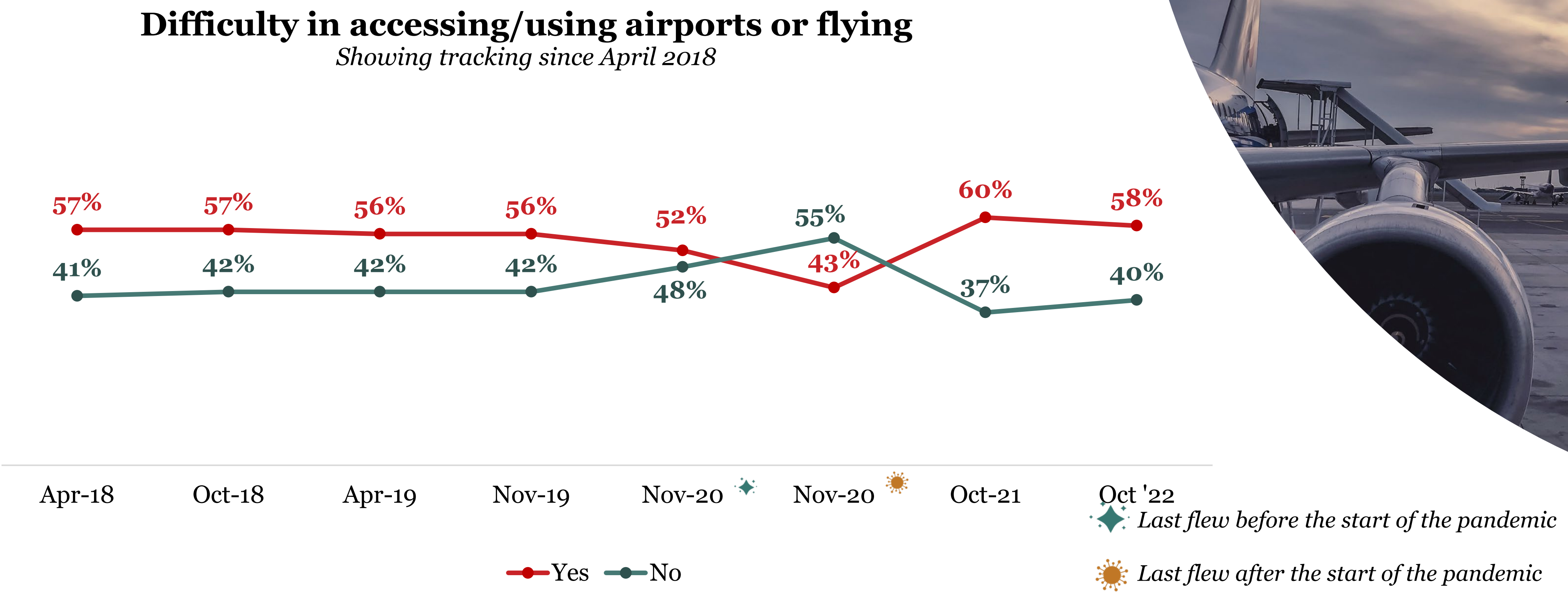


Hidden or non-hidden disability
All who have a disability (online only)



Q8. Would you classify your disability or health condition as physical, non-physical or both? Base: All who have a disability - online only (n=644)
Q9. Would you consider your disability to be a hidden or a non-hidden disability? Base: All who have a disability - online only (n=644)

Disabled passengers are still more likely than pre-pandemic to say their impairment makes flying more difficult

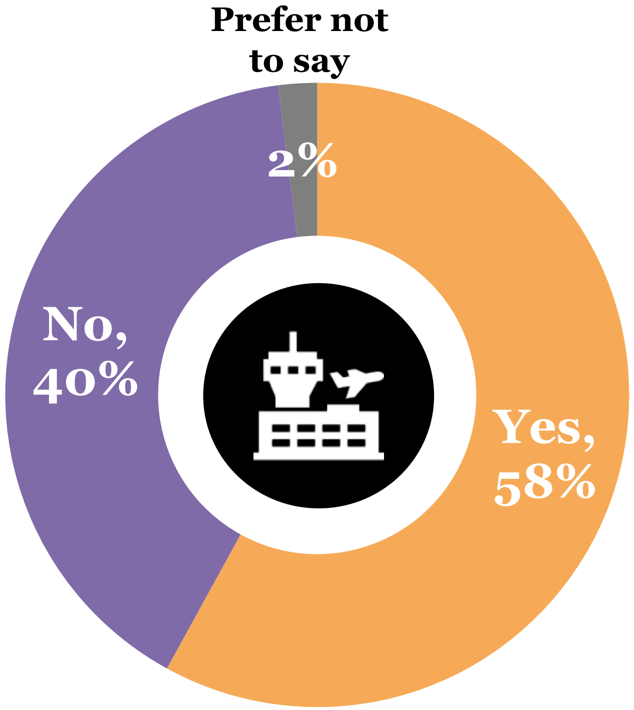


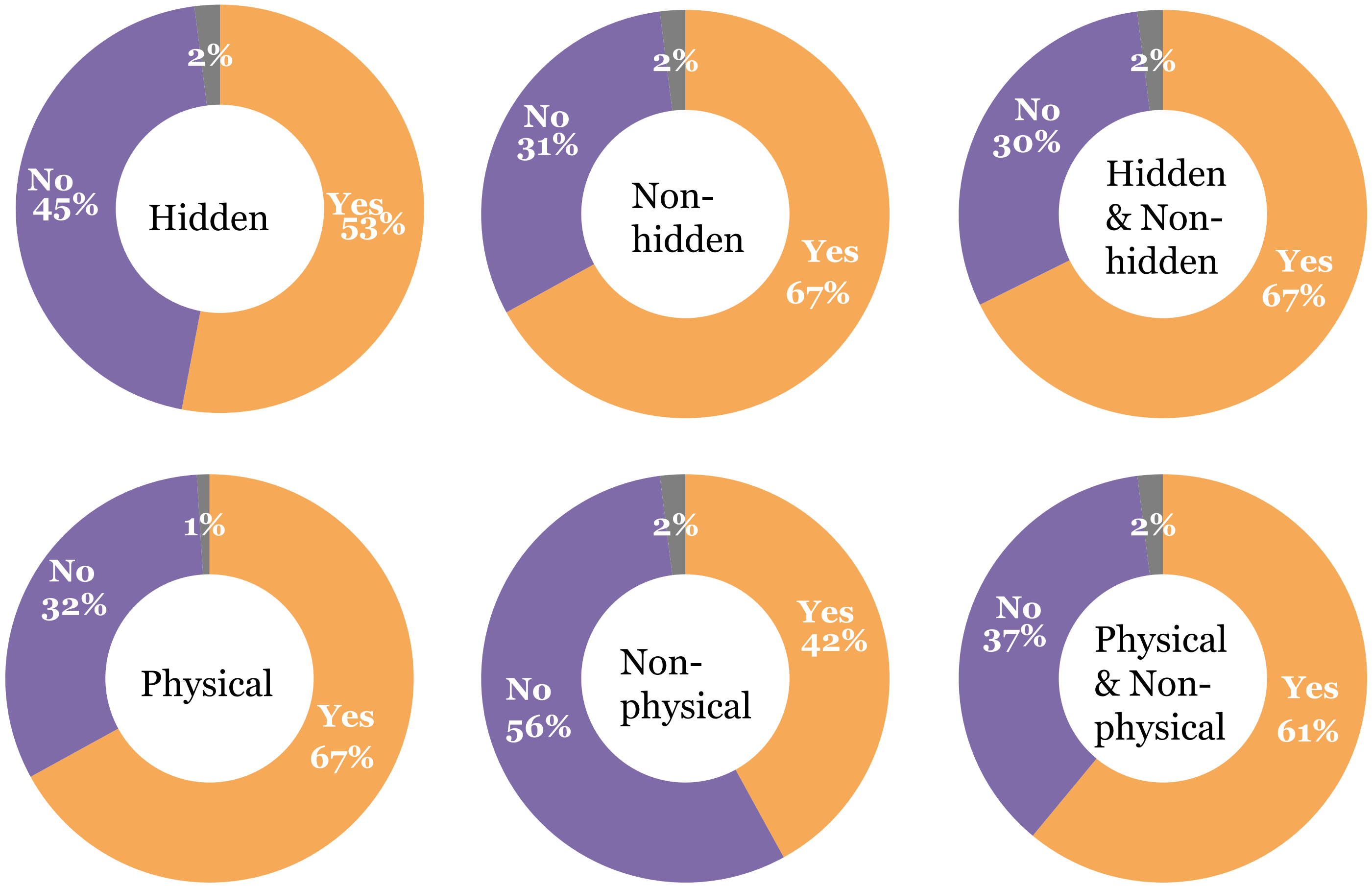
As seen previously, the high figure here is driven by those who have not flown in the last 12 months. This may suggest a need for stronger communication about the measures that have been taken to improve the airport and flying experience for disabled passengers, in case those who have not flown recently are unaware of the steps that are increasingly being taken to mitigate the difficulties that disabled passengers face.

Q7. Does/Would your disability or health condition make accessing and/or using airports or flying difficult? Base: All respondents who have a disability (April 2018 n= 734; October 2018 n= 945; April 2019 n= 875; November 2019 n= 821; November 2020 n=661; October 2021 n=878, October 2022 n=735)

Disabled respondents with physical disabilities or health conditions are considerably more likely than others to have difficulties in accessing or using airports and flying

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

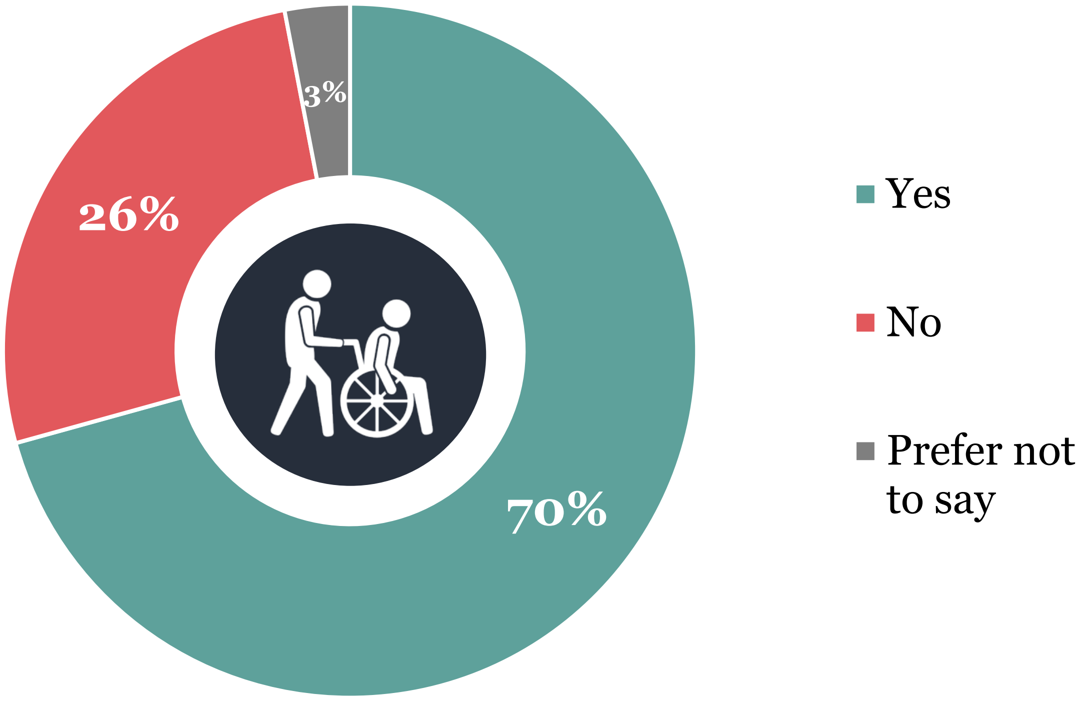




Q7. Does/would your disability or health condition make accessing and/or using airports or flying difficult? Base: All who have a disability (n=735)

7 in 10 disabled passengers require assistance when flying

Would assistance be required?
All who have a disability which makes flying difficult

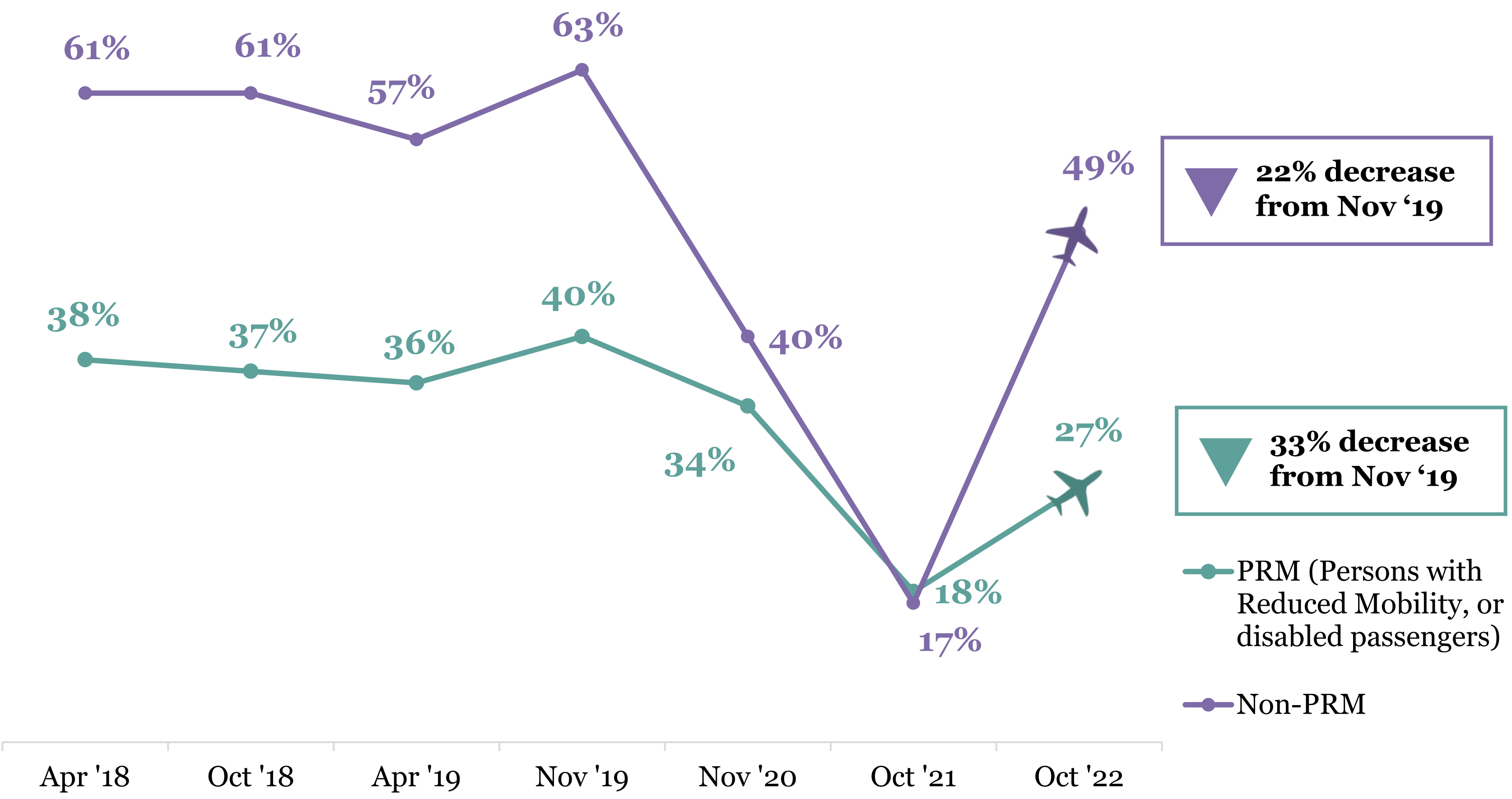


Q11. Does your disability or health condition mean that you would need or think you would need specific assistance from the airport or airline when making a flight?
Base: All those who have a disability which makes accessing/using airports or flying difficult (n=429)

Savanta:

Just 1 in 4 disabled passengers have flown in the last year, and they have been slower to resume flying post-pandemic than non-disabled passengers

Showing % that have flown in the last 12 months
PRM vs. non-PRM



Persons with Reduced Mobility (PRM, or disabled passengers) have historically been less likely to have flown recently than non-PRMs.

It is also noteworthy that **flying behaviour has returned to pre-pandemic levels at a much faster rate amongst non-disabled consumers.**

Q1. When was the last time you flew from a UK airport, either to travel within the UK or to go abroad? Base: All respondents (n=3500 in Oct '22), including PRM / disabled passengers (n=735) and non-disabled passengers (n=2733)

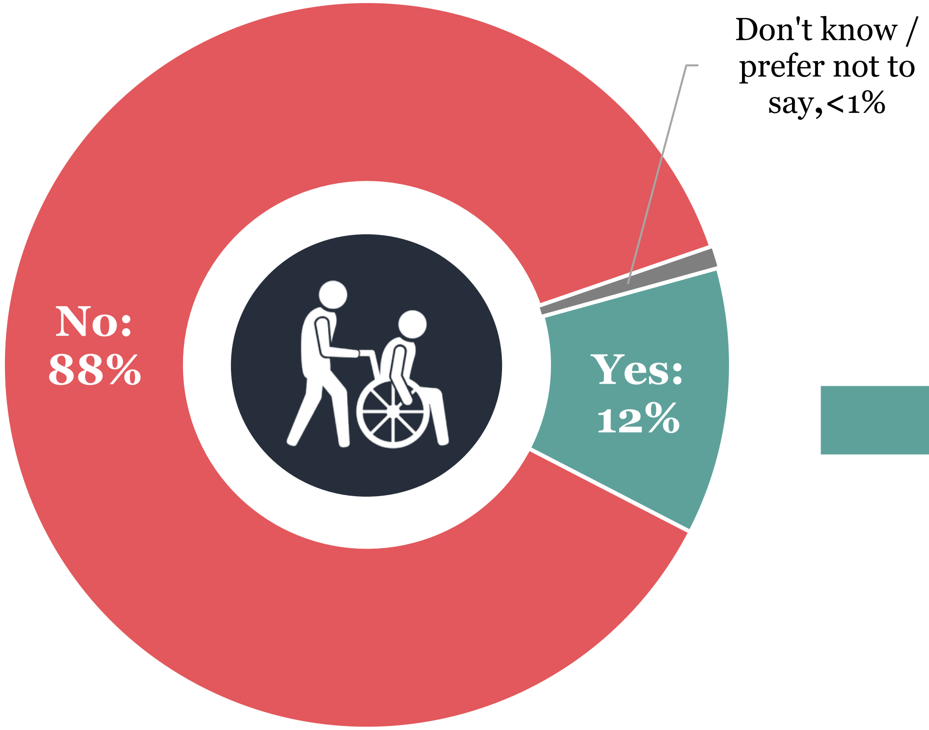
1 in 10 recent flyers say that someone in their party required assistance on their most recent flight

The majority (88%) of flyers did not have anyone in their party requiring assistance. One in ten (12%) *did* need assistance, either for themselves (6%) or for another member of their travelling party (6%).

The proportion reporting that someone in their party required assistance has halved since 2021, dropping from 26% in 2021 to 12% this wave.

Assistance required

Recent flyers or someone in their party who required assistance



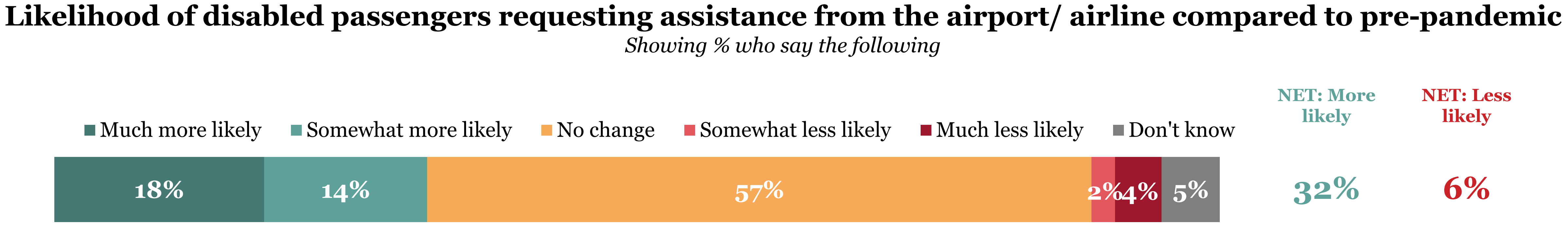
54%
Yes, I required assistance

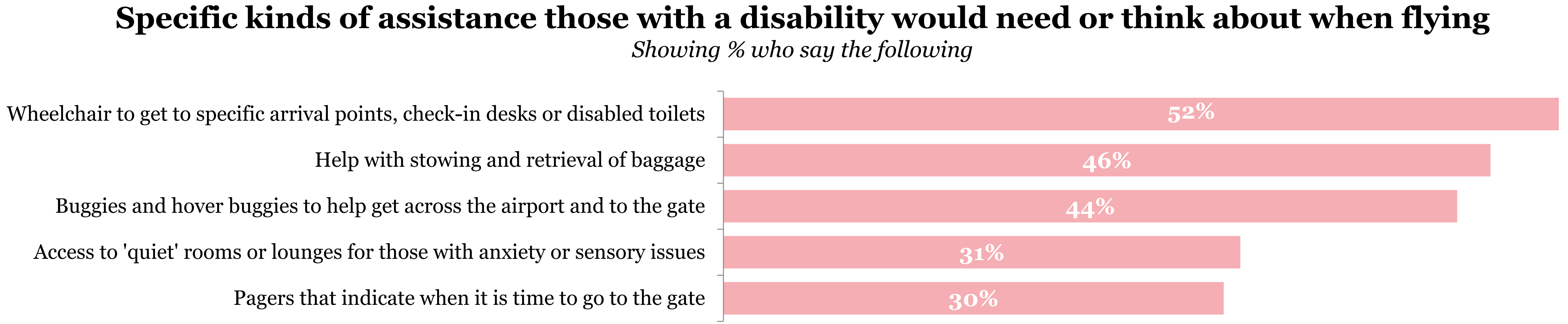
52%
Yes, I was travelling with someone who required assistance

Showing % of those answering 'Yes'

Q18. Did you or anyone in your party have a disability or health condition that meant you required some assistance from the airport or airline on this occasion?
Base: All who have flown in the last 12 months (n=1559)

On balance, disabled passengers are more likely to request assistance from the airport or airline than before the pandemic

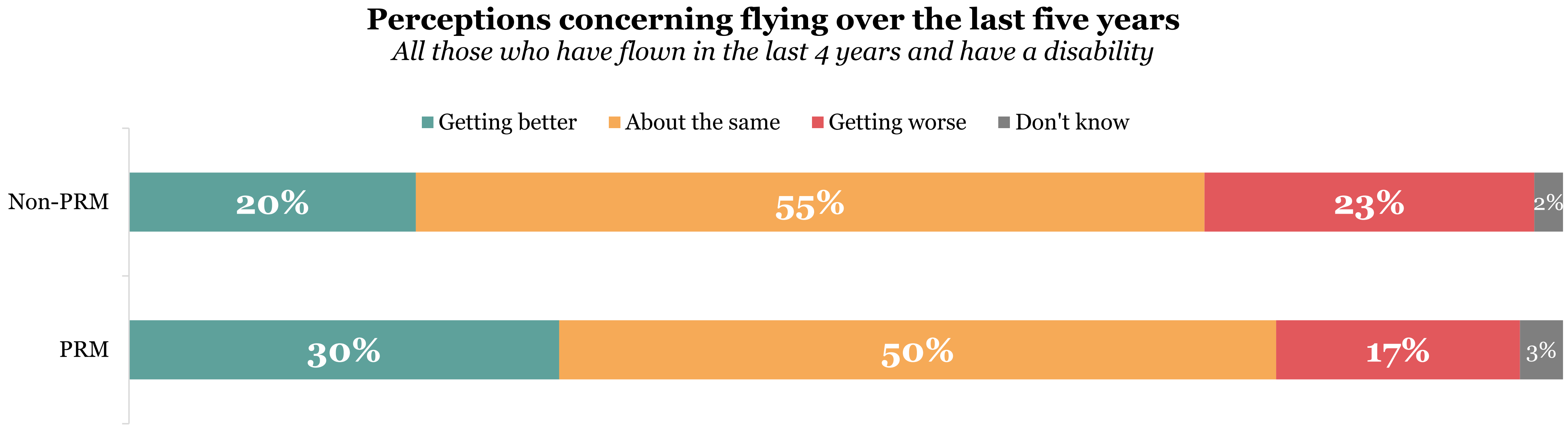




Reasons given for the increased need for assistance are varied, with consumers mentioning their disability having become worse over the COVID-19 period, continued fear about the pandemic itself, and being less confident due to the pandemic meaning they have not flown for a long time.

Q13. Are you more or less likely than before the COVID-19 pandemic began to request specific assistance from the airport or airline when making a flight? Base: all respondents with a disability or health condition that limits their day-to-day activities (n=735). Q12. What types of specific assistance, if any, would you find helpful from the airport or airline when making a flight? Base: All respondents whose disability or health condition would mean they requested specific assistance when making a flight (n=301)

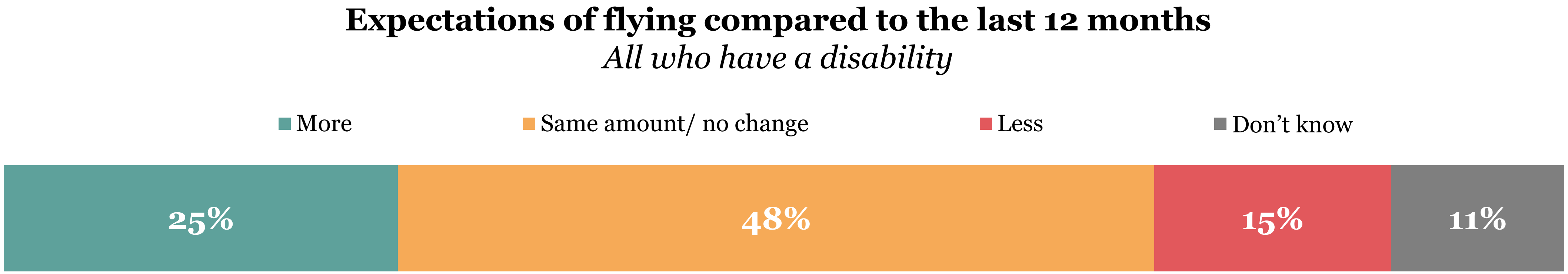
Disabled passengers are particularly likely to say that the experience of flying has got better over the last few years



Disabled passengers are significantly more like to say that the experience of flying has gotten better over the last five years than non-disabled passengers (30% vs. 20%). This view is even **more prevalent amongst those with a non-physical disability** (39%, vs. 29% amongst those with a physical disability). **Those with a non-physical disability are still less likely to be satisfied with the overall travel experience however** (73% satisfaction amongst those with a non-physical disability, 80% overall).

Q4. Thinking about your experiences of flying over the last five years, would you say that flying is:. BASE: All who have flown from the UK in the last 4 years (n=2,477), including PRM / disabled passengers (n=438) and non-disabled passengers (2,023).

Improvement in the airport and flight experience is not necessarily likely to lead to greater flight frequency given the rising cost of living



Income is likely to influence future flying behaviour, in line with the rising cost-of-living. **Disabled consumers with an annual household income of below £50,000 are more than three times as likely to say they expect to travel less than they did in the previous 12-month period** (17% vs 5% of higher household income respondents).

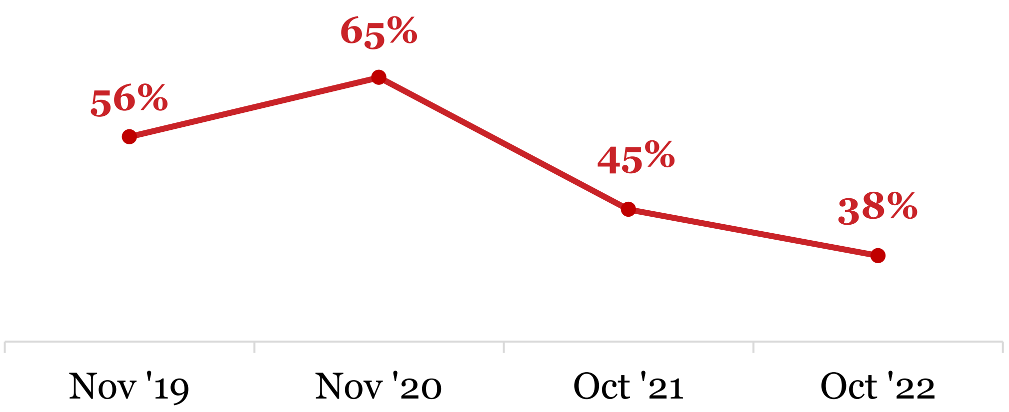
Digital confidence also appears to bear upon disabled passengers' projected behaviour, with those who are not confident using digital devices significantly more likely than those who *are* confident to say that they anticipate flying less over the next 12 months (24% vs. 14%). This should be considered when working with industry to improve the pre-booking of assistance.

Q10. 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?
Base: All respondents who have a disability (n=735)

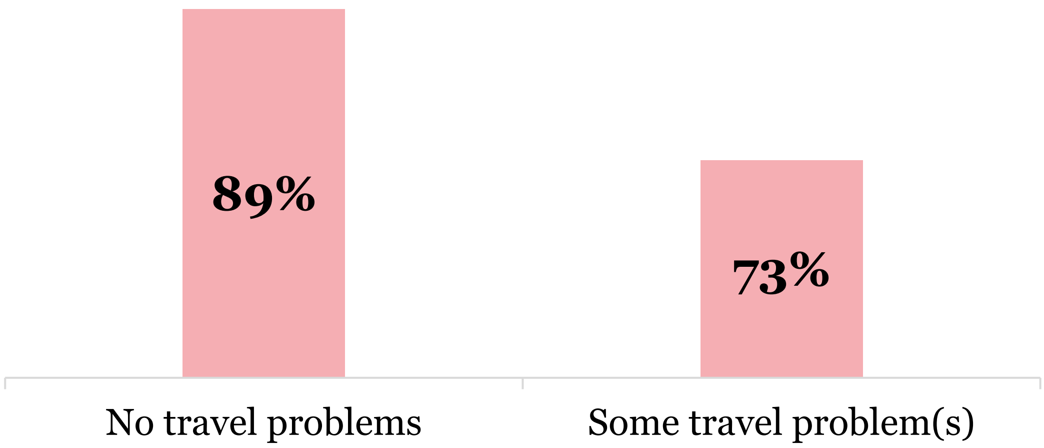
Travel disruption and complaint handling

The proportion of recent flyers reporting no travel problems continues to fall, reflecting widespread airport disruption in Summer 2022

Proportion of recent flyers with no travel problems



Satisfaction with the overall travel experience when there are…



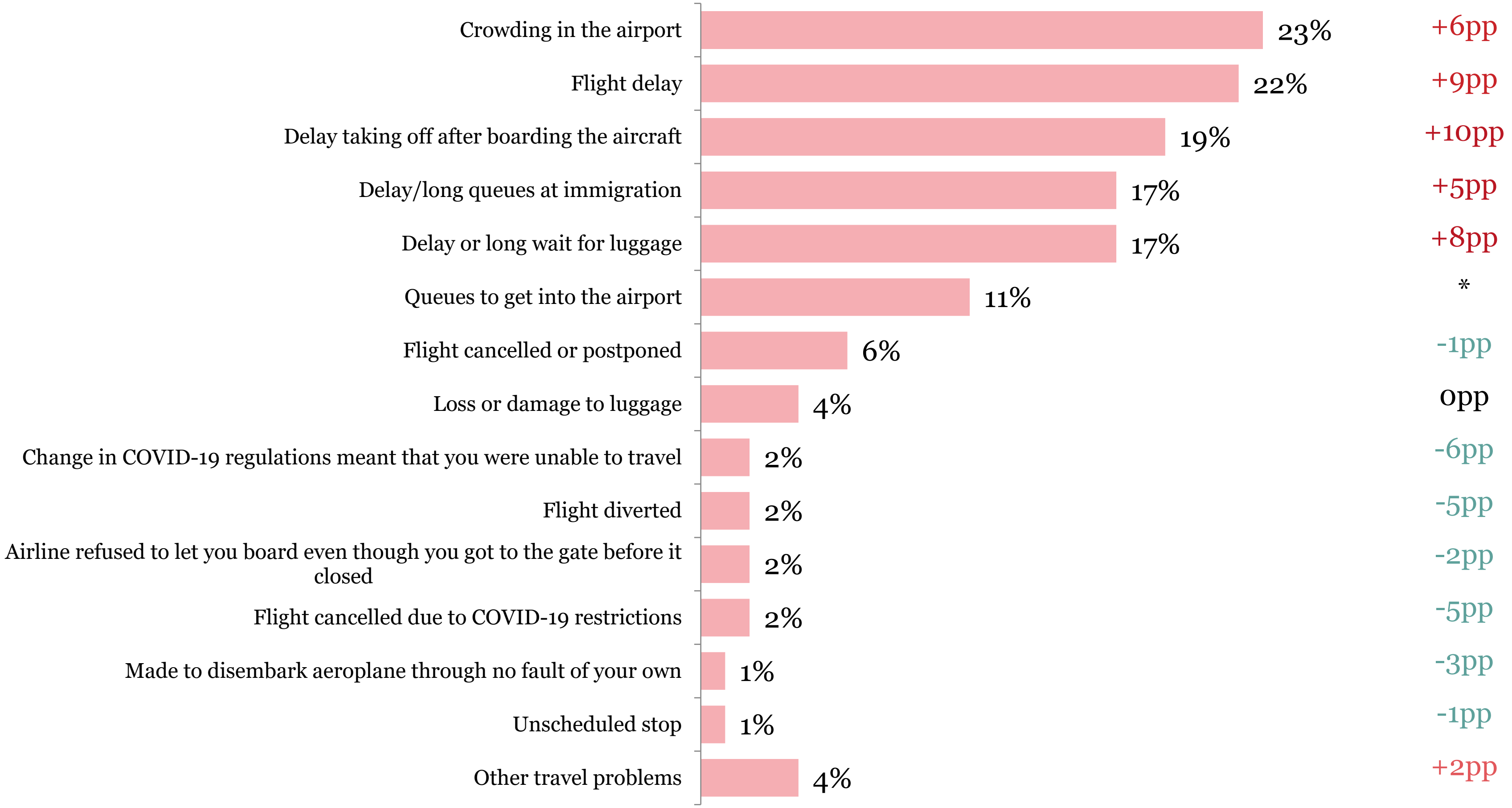
Q26. During your most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=3,100). Q23.17. The overall travel experience: Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1,553).

Crowding and flight delays are the most prevalent forms of disruption, while COVID-related issues have declined

Experience of recent flight issue(s)

Showing % who say the following

Change from 2021



Any issue (NET):

61%

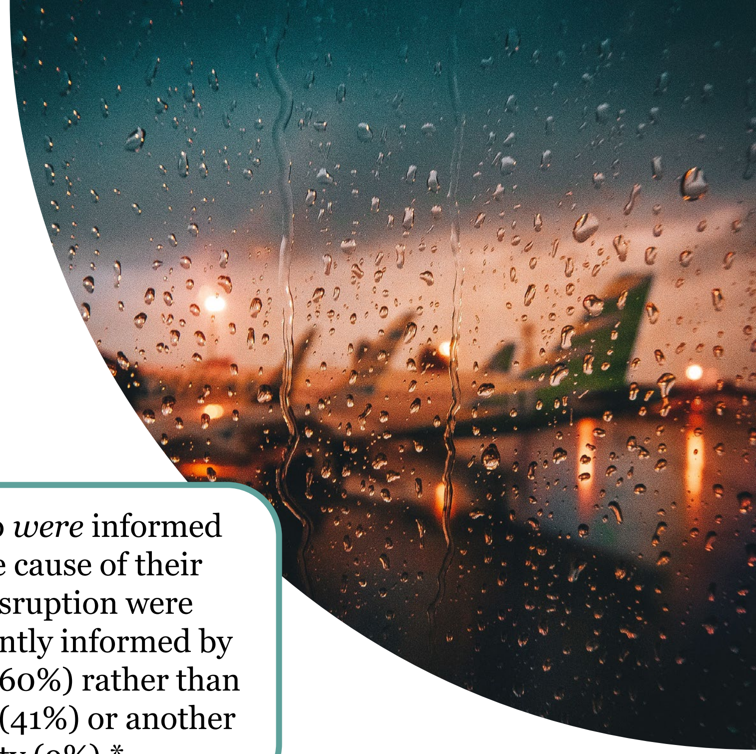
▲ **Age**
18-34: 70%

▲ **Disability**
PRM: 71%

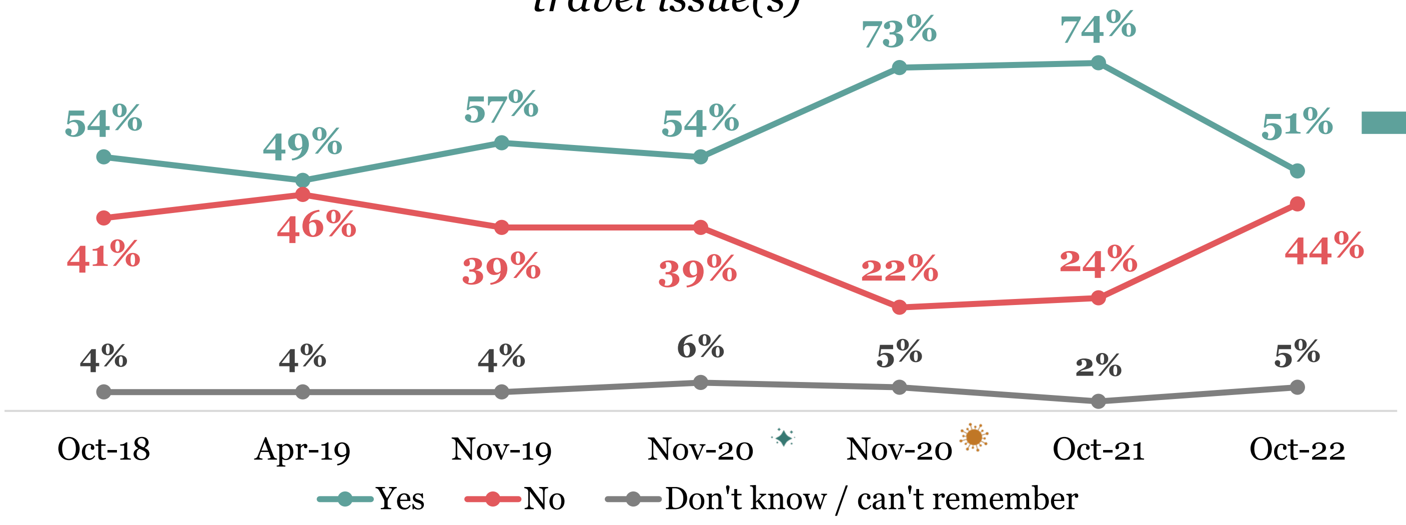
▲ **Departure airport**
London City**: 73%
Luton: 71%
Belfast International**: 70%

Q26. During your most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=1,558). *This was a new option for this wave of the survey, so tracked data is not available. **Base size <50 so should be treated with caution.

The shift towards crowding and delays being the main issue appears to have made airports/airlines less likely to communicate the cause



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



Those who *were* informed about the cause of their travel disruption were predominantly informed by the airline (60%) rather than the airport (41%) or another party (9%).*

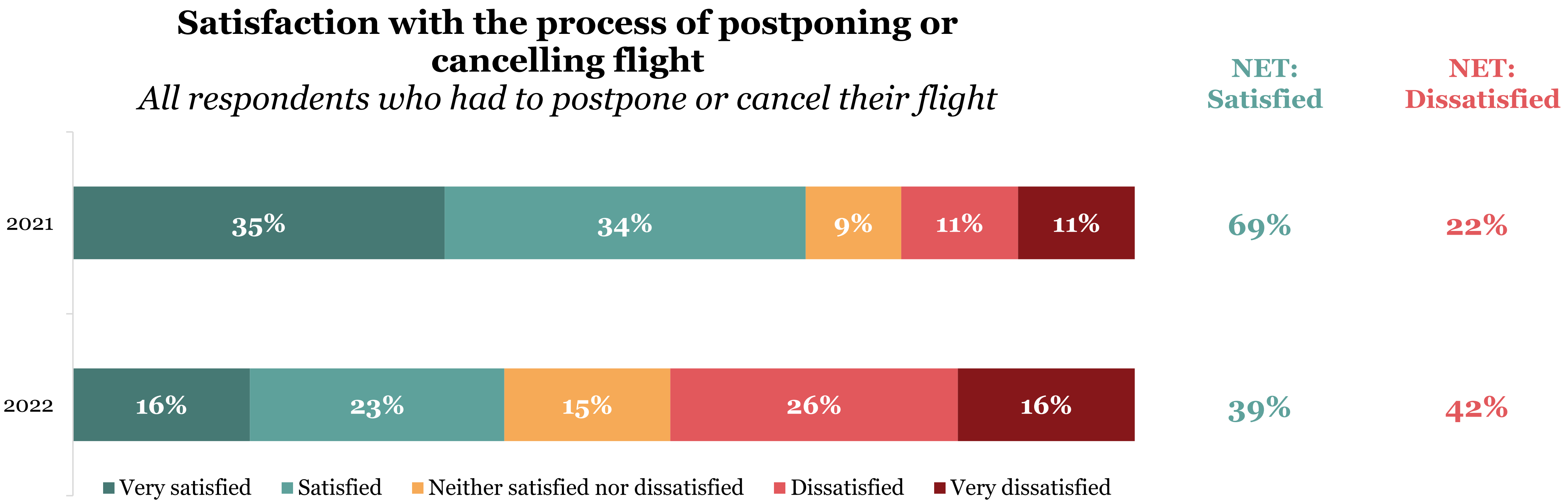
Last flew before the start of the pandemic

Last flew after the start of the pandemic

The drop in the number of passengers who were informed since last wave may in part be due to the nature of the disruptions. During the pandemic, many of the disruptions will have been cancellations and restrictions directly owing to the pandemic. Conversely, overcrowding in the airport is the most prevalent travel issue this wave, and this is a less foreseeable issue with a less obvious cause.

Q28. Were you informed of the cause of the issue(s) you experienced on your most recent journey? Base: All who have flown in the last 12 months and experienced a travel problem (October 2022 n=945, October 2021 n=313; November 2020 n=447; November 2019 n = 843; April 2019 n = 349; Oct 2018 n =508). *Respondents could list multiple sources, hence why responses jointly exceed 100% here.

Satisfaction with the process of postponing or cancelling a flight sees a steep decline

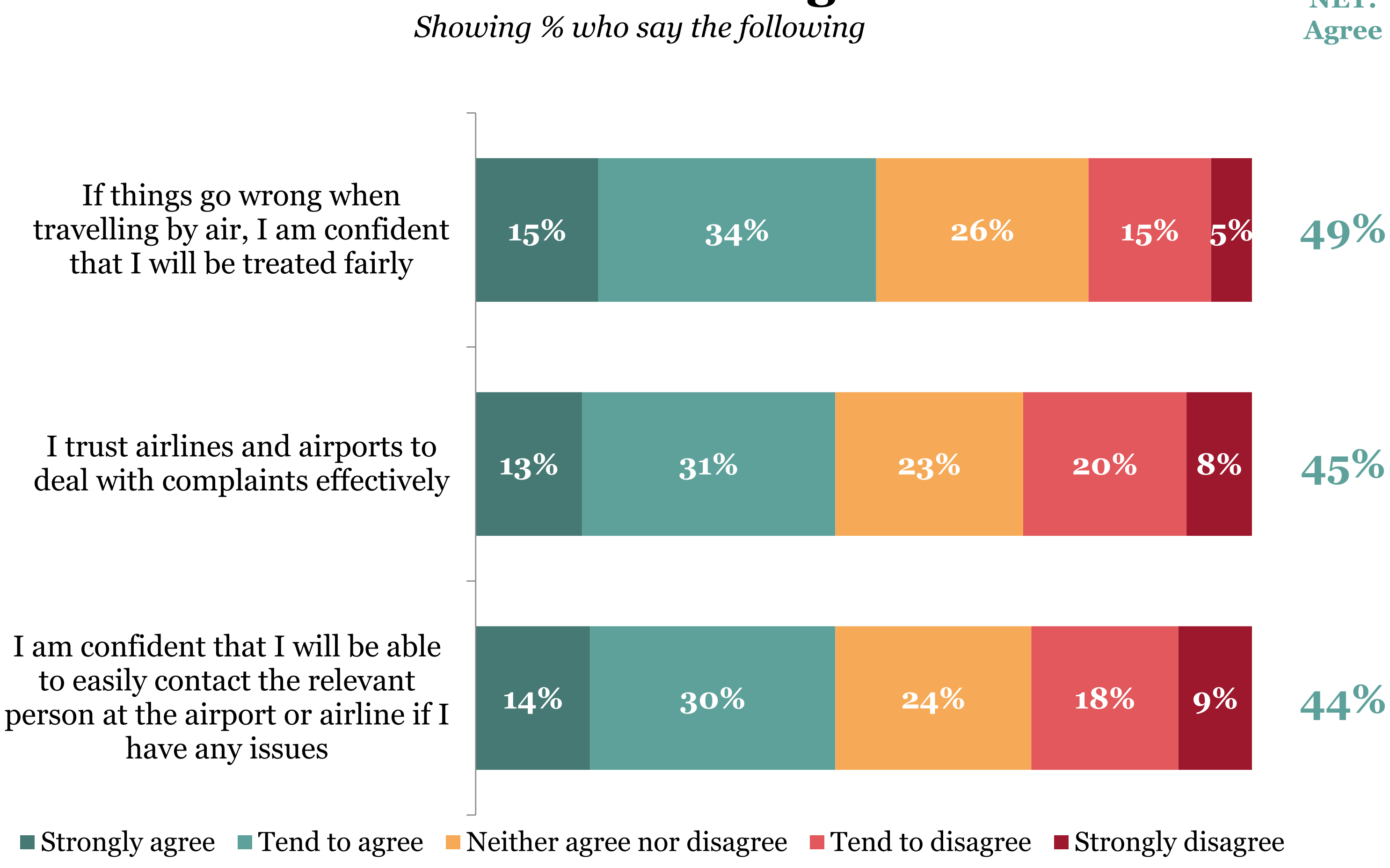


Encouragingly, **the proportion of passengers experiencing a cancellation or postponement on their most recent trip has fallen** since October 2021 (from 11% to 7% this wave). However, satisfaction **with the process of postponement or cancellation has almost halved** in this time, decreasing from 69% to 39%. In turn, dissatisfaction has doubled (22% last wave to 42% this wave).

Q26. During your most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=3,100). Q27. How satisfied, or dissatisfied, were you with the process of postponing or cancelling your flight? Base: All respondents who have had to postpone or cancel their flight (n=104)

Only around half of all consumers are confident they will be treated fairly and their concerns listened to when travel disruption actually occurs

Statements about the handling of travel issues

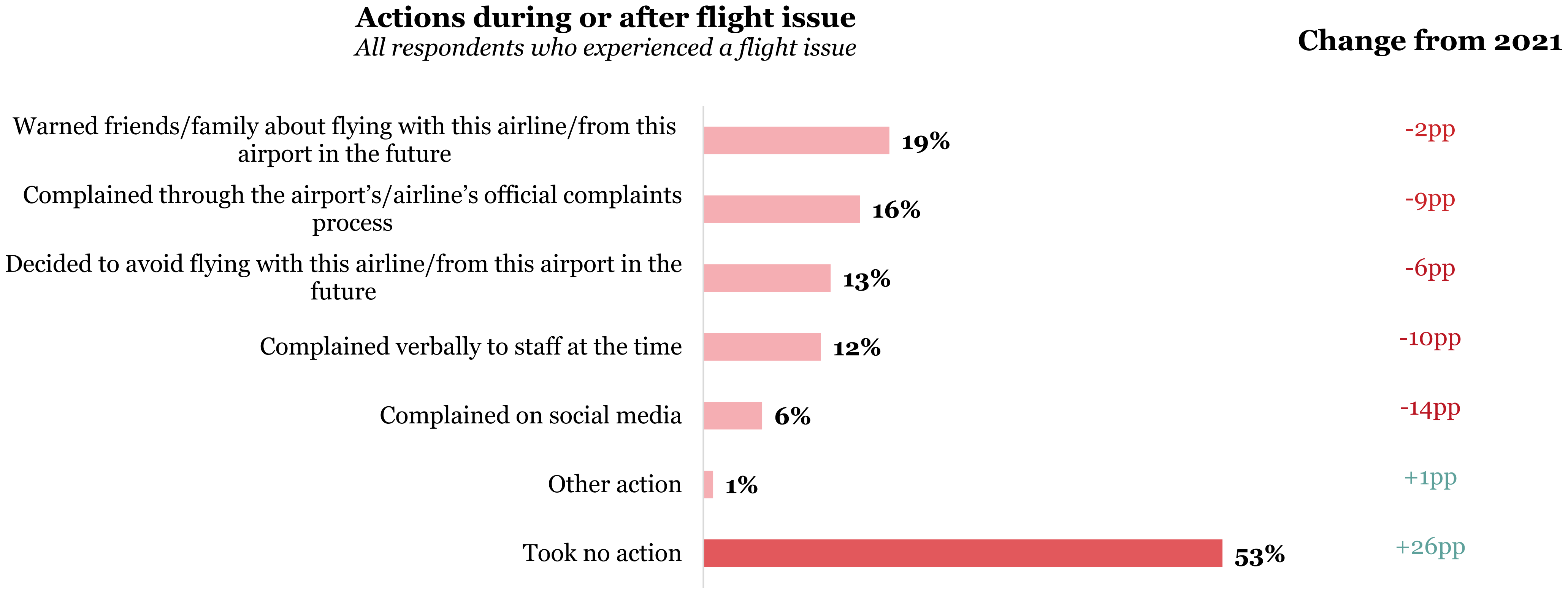


Consumers aged 55 and over, and those who are not digitally confident are significantly less likely to agree with all three of these statements than their counterparts, perhaps suggesting **that complaint procedures could be made more accessible to this audience.**

Those who have flown since the start of the pandemic are significantly more likely to agree with each of the statements than those who last flew immediately prior to the pandemic, showing trust is built through experience.

Q21. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3,500)

The proportion of customers making complaints, whether formal or not, has fallen markedly since last wave



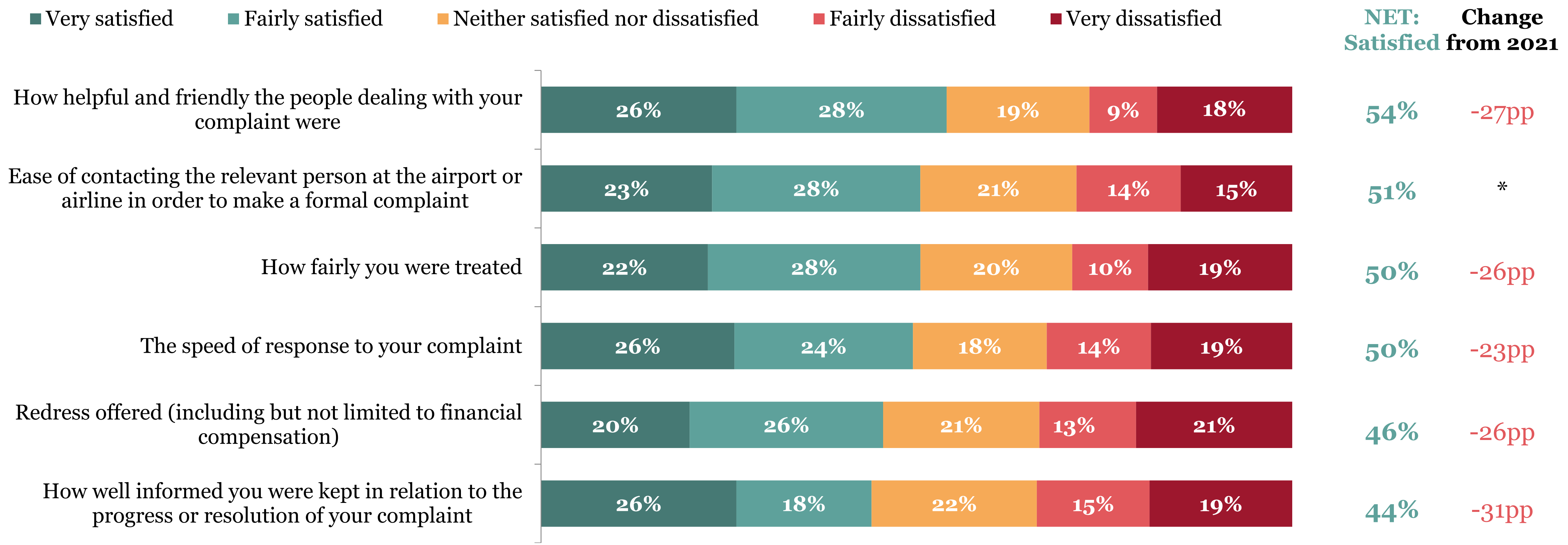
Half (53%) of travellers who experienced a flight issue took no action at all, almost double the proportion who said they took no action last wave (27%). This may reflect that the travel issues most commonly experienced this wave – such as crowding and queues – are the most difficult to make a complaint about beyond the inconvenience caused. For example, 52% of those who experienced crowding in the airport said they took no action, compared to just 19% of those who faced a flight diversion.

Q29. Which, if any, of the following did you do during or after experiencing your flight issue? Base: all who experienced a flight issue (n=945)

Satisfaction with all aspects of complaint handling has fallen sharply, likely because crowding and queues may be more difficult to complain about

Satisfaction with how complaints were handled

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



Q30. 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 'Not applicable' and 'Don't know' responses (n=235-257). *New statement for this wave, so no tracked data available.

One third of those complaining did so because they wanted financial compensation

Expectations after making a formal complaint

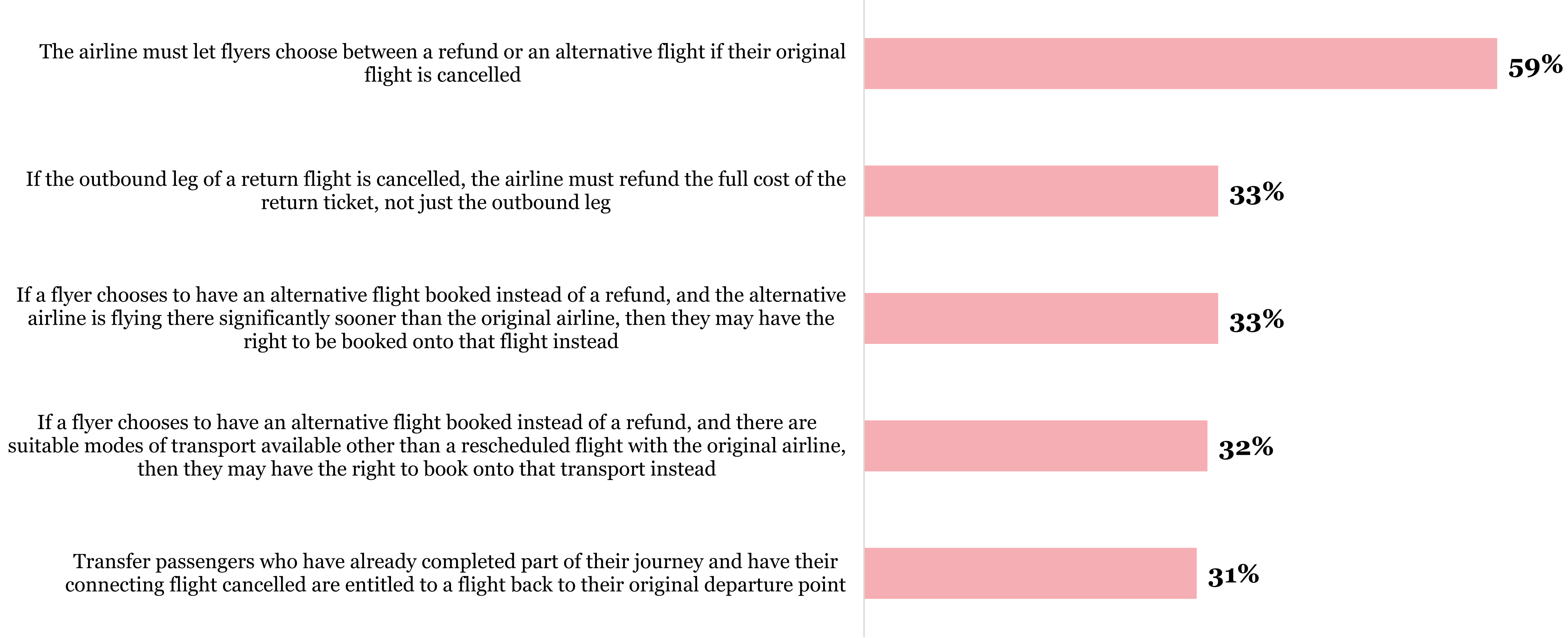
All respondents who complained about a travel problem

Q31. What, if anything, were you expecting when making a formal complaint? Base: all who complained about a travel problem (n=269)

The majority are aware of the right to a refund or alternative flight in the case of cancellation, but awareness of more specific rights is lower

Awareness of rights under UK law when a flight is cancelled

All respondents (showing % who say they are aware)



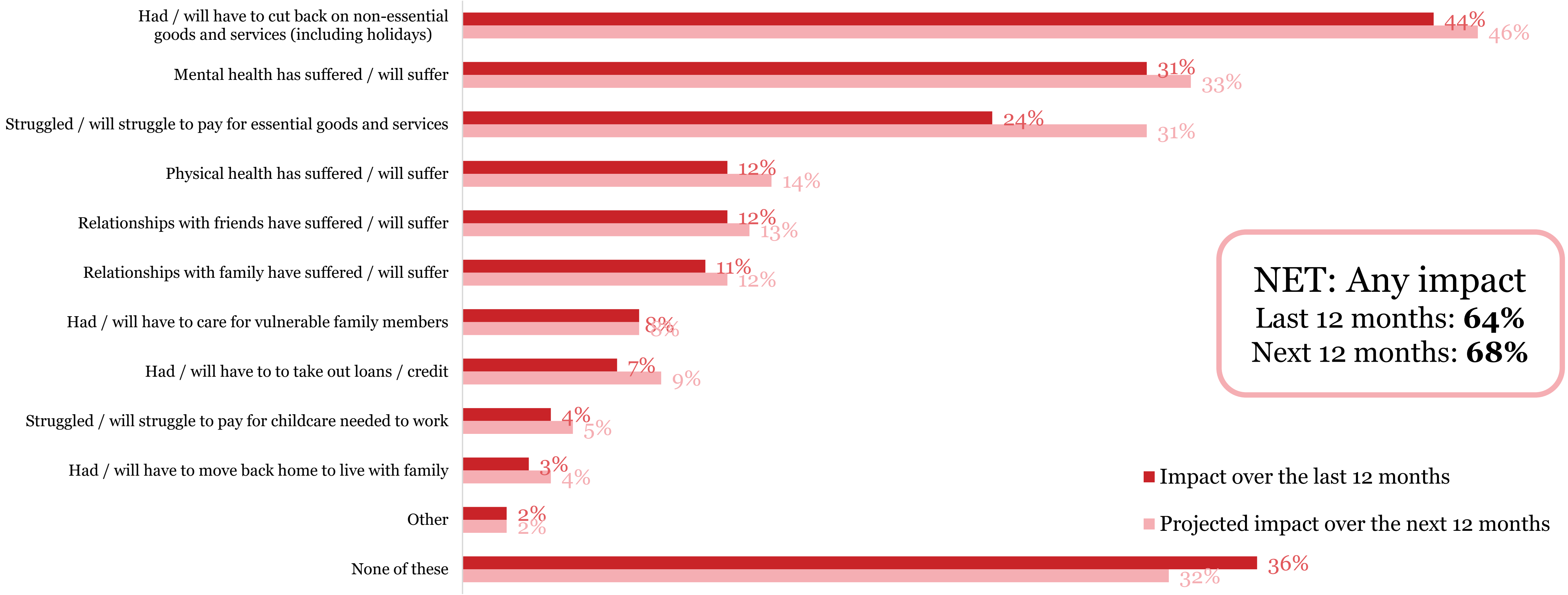
Q32. Under UK law, if a flight is cancelled, the airline must let flyers choose between two options – either a refund on all parts of the ticket that have not been used, or an alternative flight. Please indicate if you were aware or unaware of the following before today. Base: all respondents (n=3,500).

Impact of the rising cost of living

The impact of the rising cost of living is widespread, with almost half of consumers cutting back on non-essential goods such as holidays

Impact of the rising cost of living and anticipated future impact

Showing % who say the following



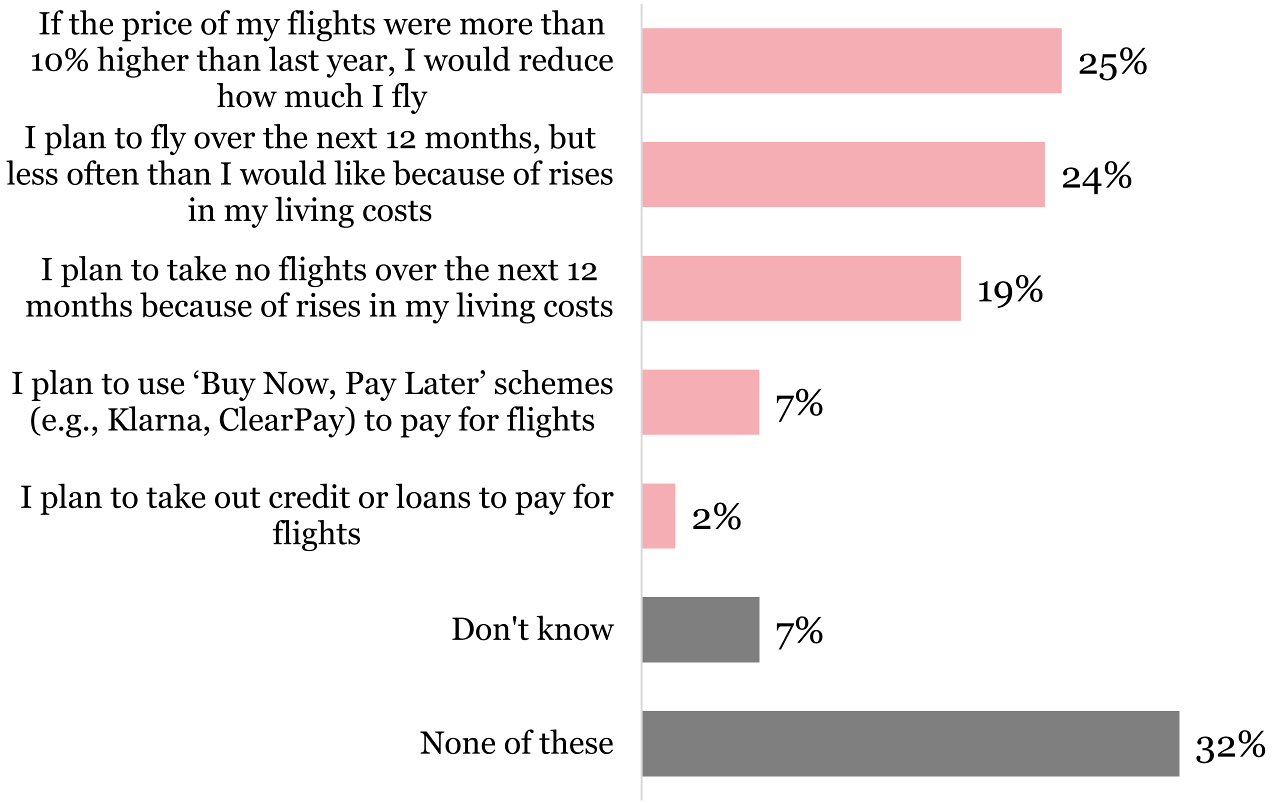
NET: Any impact
Last 12 months: **64%**
Next 12 months: **68%**

Q38. How, if at all, has the rising cost of living impacted you personally over the last 12 months?
Q39. And how, if at all, do you think the rising cost of living will impact you personally over the next 12 months? Base: All respondents (n=3,500)

More than 2 in 5 plan to reduce the amount they fly or plan not to fly at all over the next 12 months

Anticipated changes to flying behaviour

Showing % who say the following



The rising cost of living clearly has a major bearing upon anticipated changes to flying behaviour. Just 1 in 5 (20%) of those who have been impacted by the rising cost of living say they will not make any of these changes to their flight behaviour (compared to 53% amongst those unimpacted by the rising cost of living).

Younger consumers (18-34 year olds) are significantly more likely to plan to use 'Buy Now, Pay Later' schemes than older groups (13% vs. 8% amongst 35-54s and 2% amongst those aged 55 and over).

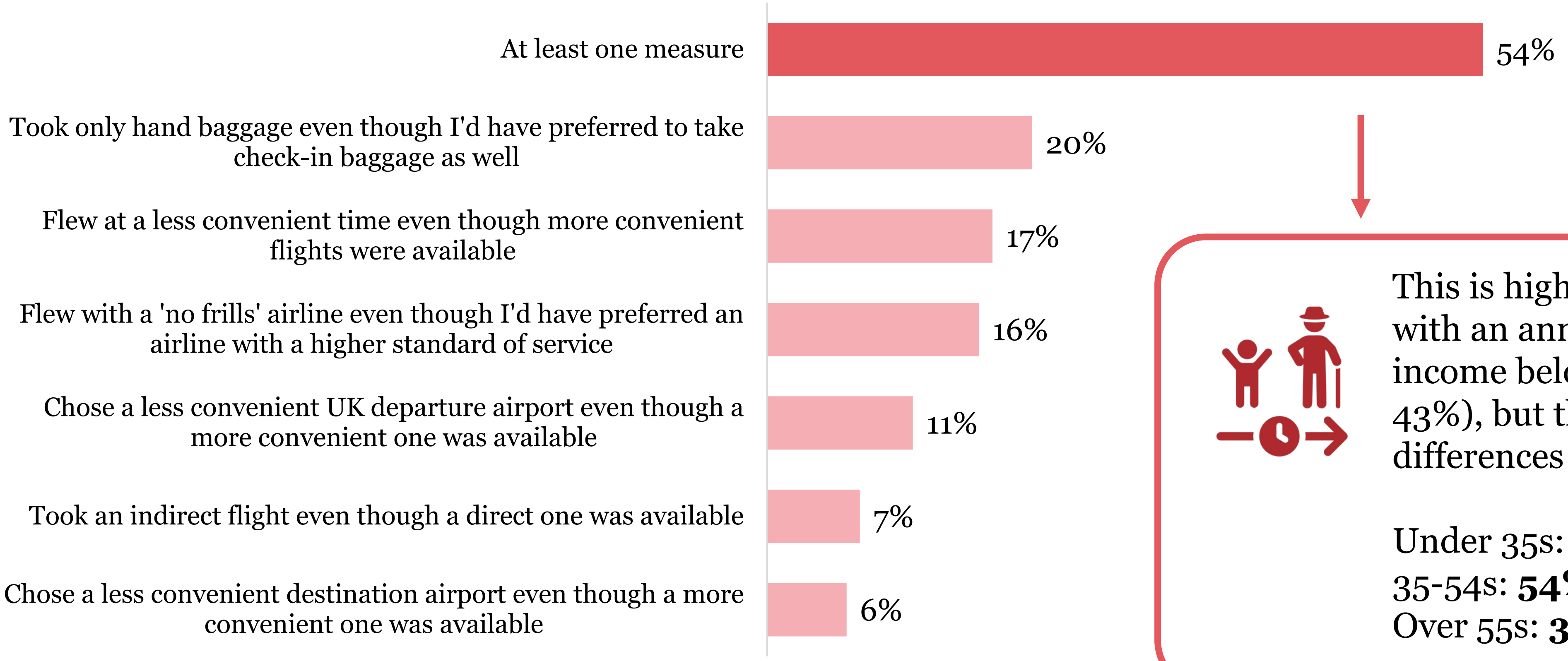
Disruption clearly has an influence in addition to the rising cost of living, as those reporting **no travel problems on their last flight are significantly more likely to say they have made no changes to their flying behaviour** (38%) than those who have had travel problems (24%).

Q40. Thinking specifically about flying, which of the following apply to you? Base: All respondents (n=3,500)

The majority of those who have flown recently have taken measures to save money on their trip

Measures taken to save money

Showing % who say the following



This is higher amongst those with an annual household income below £50k (49% vs. 43%), but the more pronounced differences are by **age**:

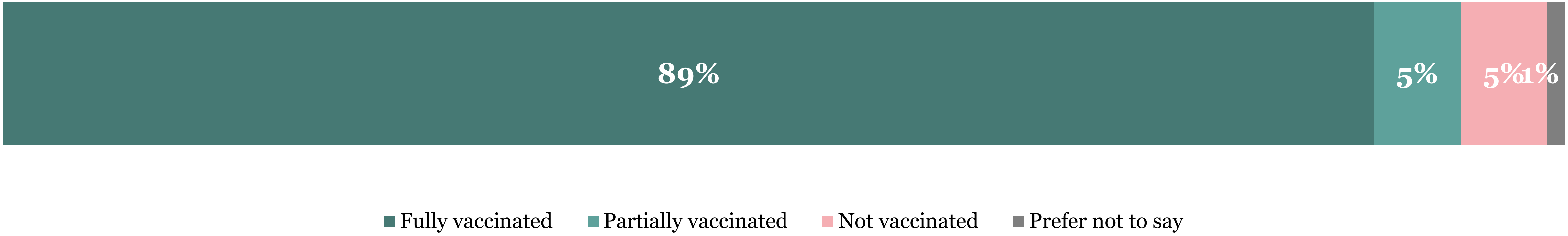
Under 35s: **74%**
35-54s: **54%**
Over 55s: **34%**

Q17. Still thinking about this most recent flight, did you do any of the following to save money on your trip? Base: All who have flown in the last 12 months (n=1,558)

Long-term impact of the pandemic

9 in 10 of those who have flown in the last 12 months were fully vaccinated when they flew

Vaccination status last time travelled
All recent travellers

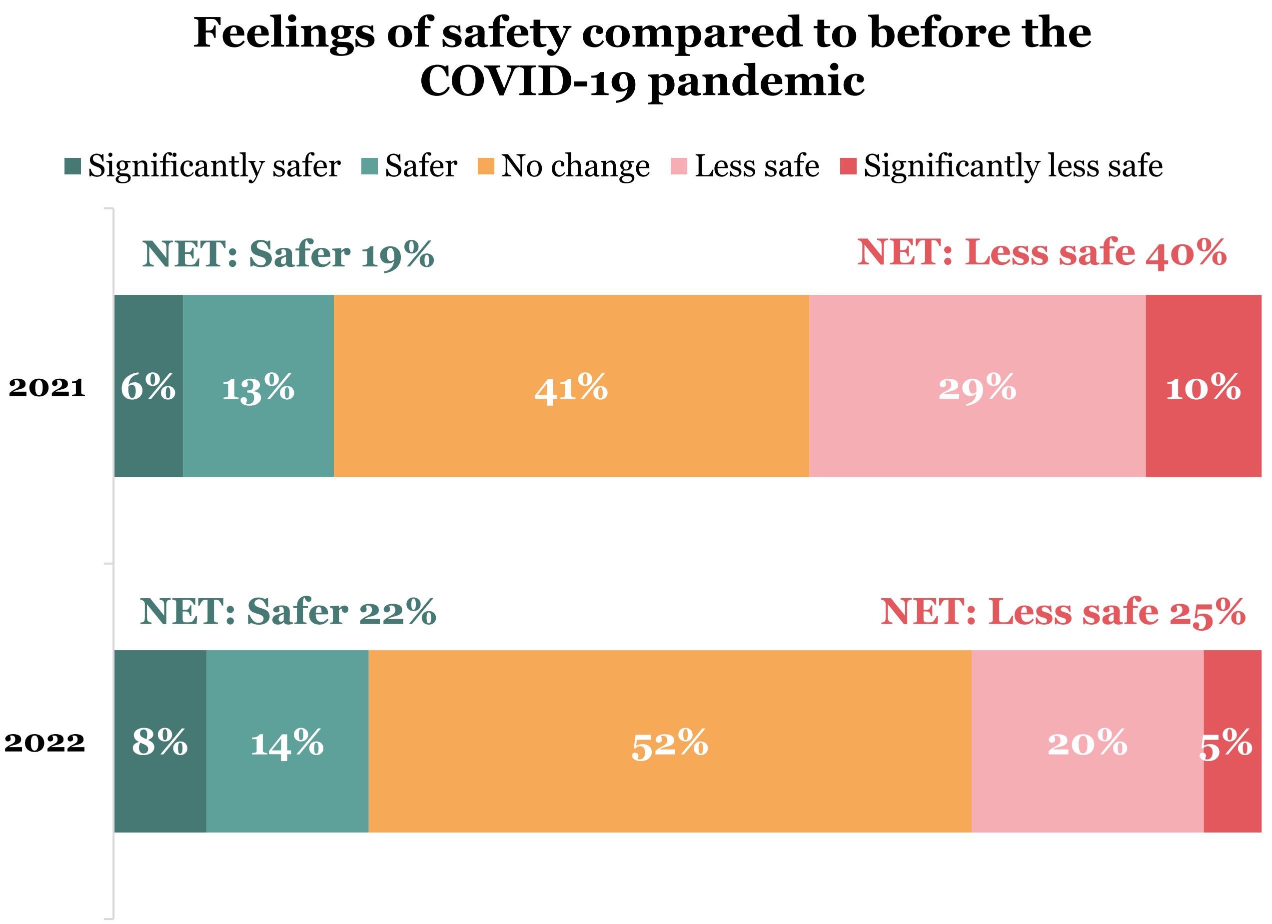


The likelihood of being vaccinated increases with age: just 4 in 5 of those aged 18-34 were fully vaccinated (80%), compared to 88% amongst 35-54 year olds and 99% amongst those aged 55 and over. Among respondents with a disability, those with a physical disability (90%), or a combination of physical and non-physical disability (89%) were significantly more likely to be vaccinated than respondents with a non-physical disability (76%).

Regionally, the South East, South West, Wales and Scotland held the highest proportion of fully vaccinated recent flyers.

Q33. Thinking back to the last time you travelled by air, what was your COVID-19 vaccination status? Base: All respondents who have flown in the last 12 months (n=1,559).

Consumers are increasingly feeling safe when flying again, especially 18-34 year olds



The proportion of consumers who say that the pandemic has made them feel less safe about flying has dropped markedly (from 40% in 2021 to 25% this wave).

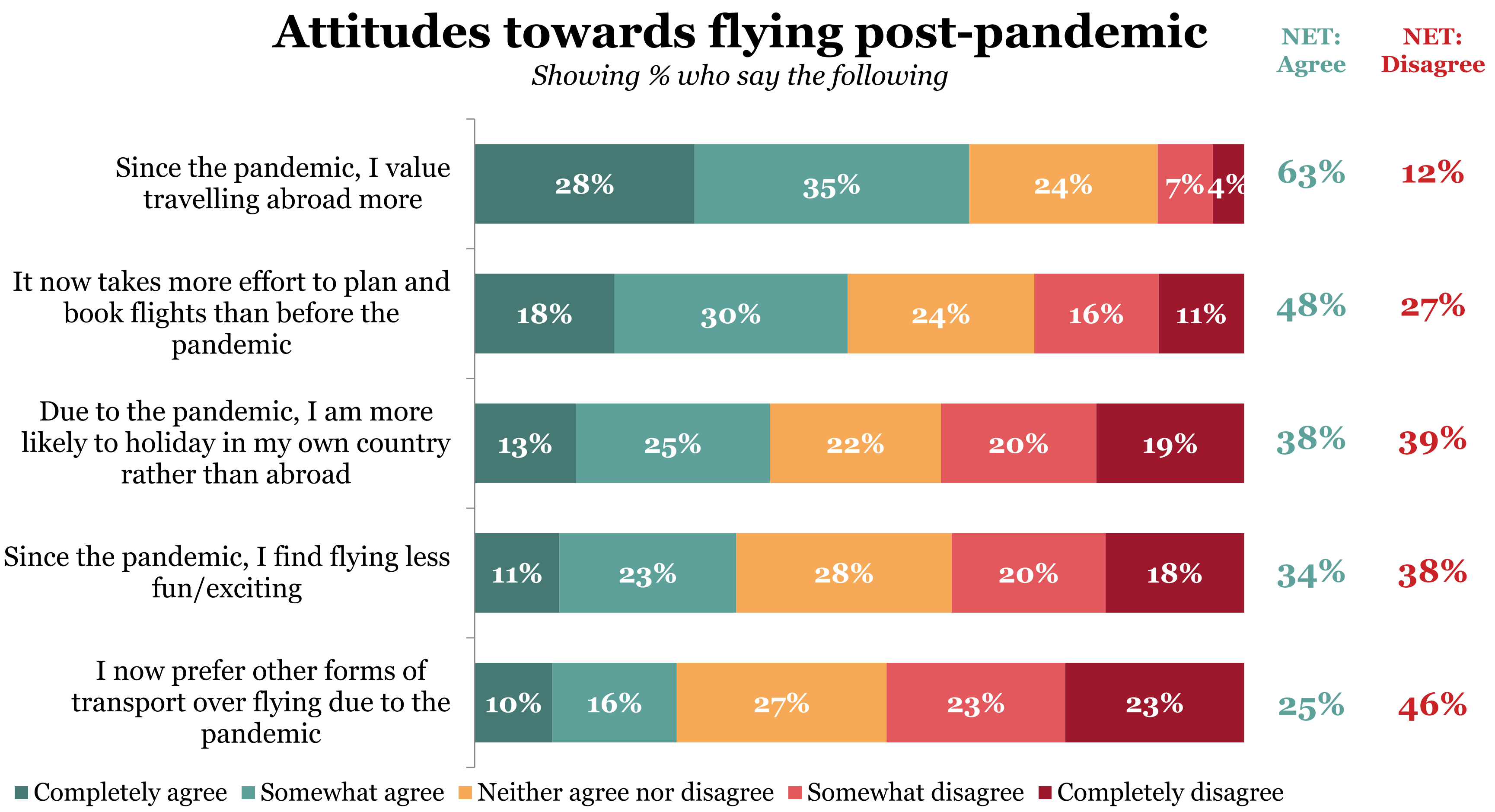
Those aged 18-34 are significantly more likely to say they feel safer (37%) than those aged 35-54 (21%) or 55+ (13%) - reflected in the fact that under 35s a more likely to have flown since the pandemic compared to older consumers.

Disabled passengers are also significantly more likely to say that they feel safer about flying compared to prior to the pandemic (28% vs. 21% amongst non-disabled passengers).

Finally, respondents who were fully (35%) or partially vaccinated (44%) when they last travelled by air are significantly more likely to say that they feel safer than those who were not vaccinated (18%).

Q34. At present, do you feel safer or less safe about flying than you did before the COVID-19 pandemic? Base: all respondents (n=3,500).

Three in five of those who have flown since the pandemic say they value travelling abroad more than ever now



The majority agree they value travelling abroad more (63%) and just 1 in 4 (25%) say that the pandemic has driven them to other modes of transport.

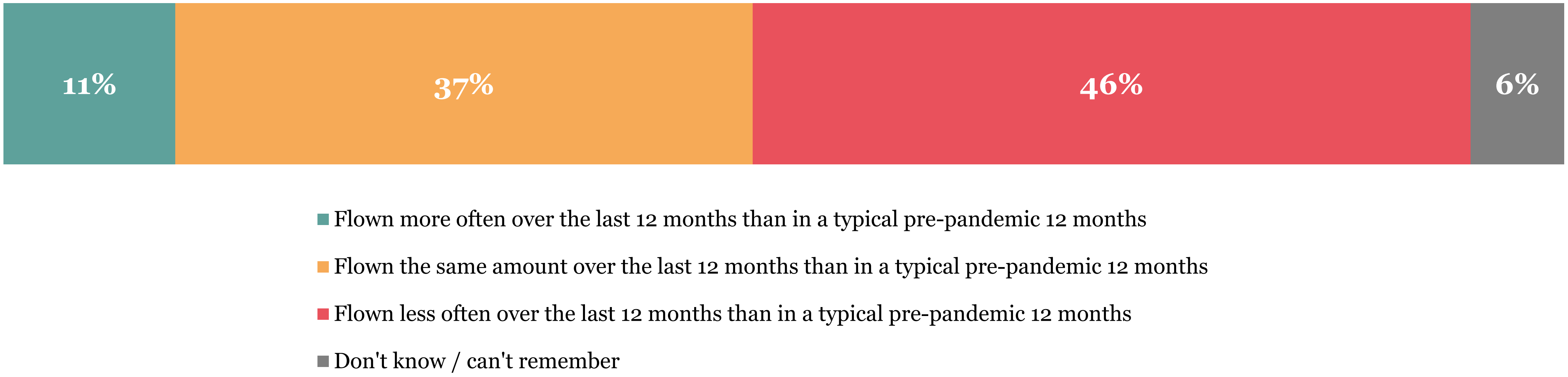
When it comes to holidaying domestically rather than abroad, income is again a major dividing line. Those with an income of over £50,000 are significantly more likely to reject the idea that they will holiday in their own country than those with an income below this (46% vs. 35%).

Q37. SUMMARY: To what extent do you agree with the following statements about the impact of COVID-19 on your attitudes towards flying?
Base: All who have flown since the pandemic (n=1743)

Almost half of consumers are flying less than they were pre-pandemic, especially older people and those with lower incomes

Changes in flying behaviour compared to pre-pandemic

Showing % who say the following

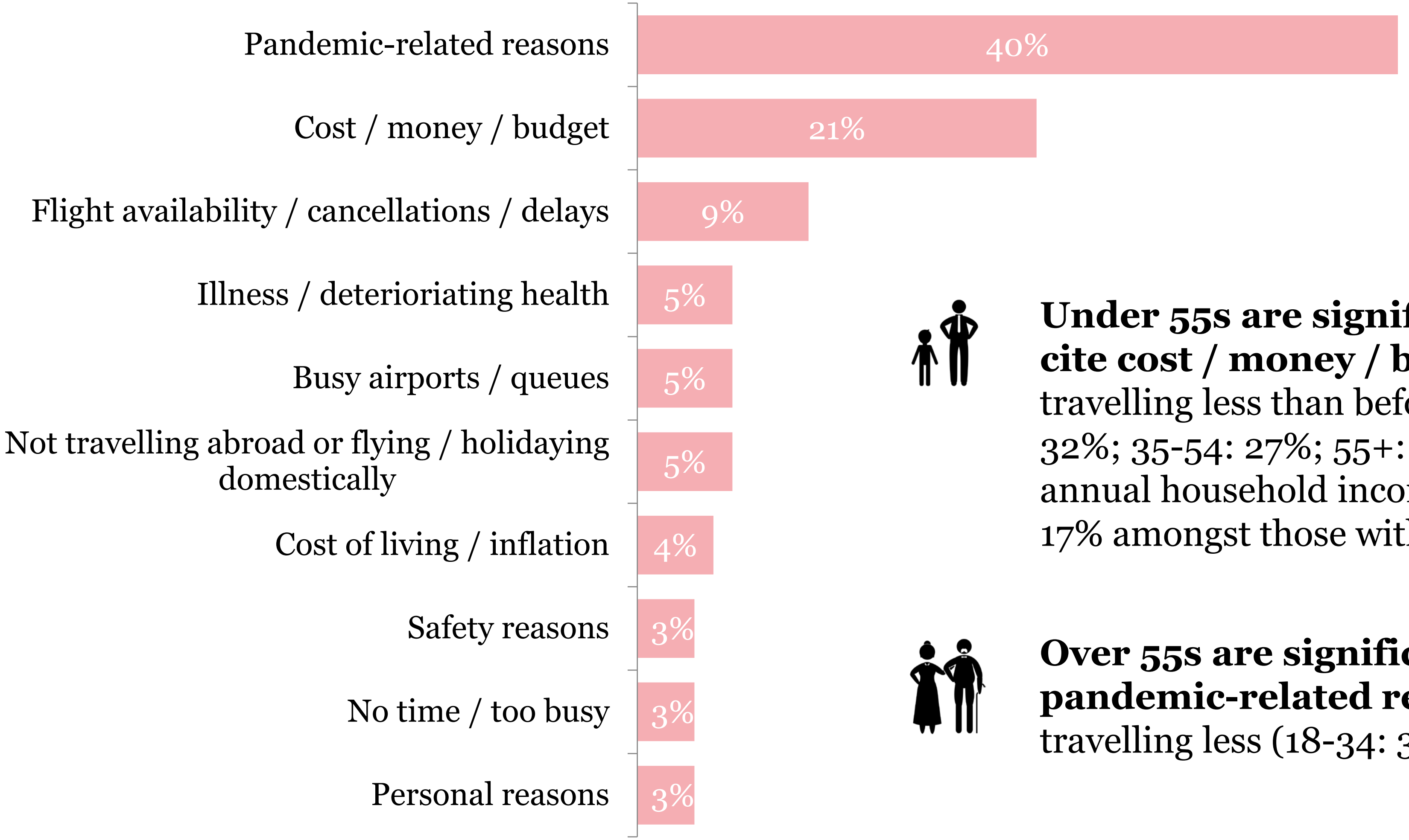


Reflecting other findings in this report, older consumers tend to have flown less often in the last 12 months than in a typical pre-pandemic 12 months (56% amongst those aged 55+ vs. 45% amongst 35-54 year olds and 30% amongst 18-34s).

Those with an annual household income of under £50k+ are half as likely to have flown more over the last 12 months than those with an income greater than this (9% vs. 18% respectively).

Q35. Thinking about the last 12 months, which of the following statements best describes how your flying behaviour has changed, if at all, compared to before the pandemic began in March 2020? Base: All who have flown previously (n=3,291).

Pandemic-related and budgetary reasons are the most common reasons given by those who flew less in the last 12 months



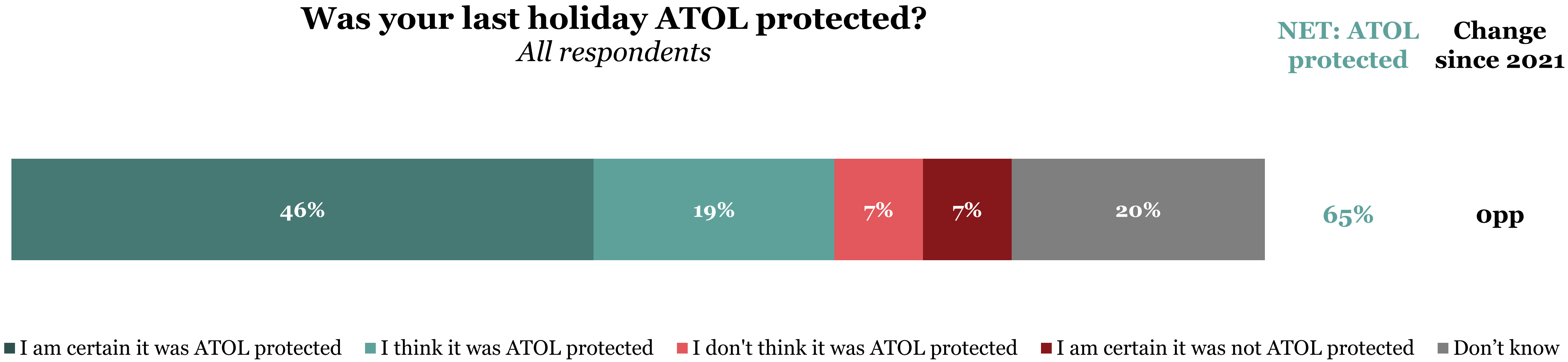
Under 55s are significantly more likely to cite cost / money / budget as a reason for travelling less than before the pandemic (18-34: 32%; 35-54: 27%; 55+: 13%), as are those with an annual household income under £50,000 (24% vs. 17% amongst those with a higher income).

Over 55s are significantly more likely to cite pandemic-related reasons as a reason for travelling less (18-34: 37%; 35-54: 35%; 55+: 45%).

Q36. You said you fly less often than you did before the pandemic began. What are the main reasons for this? Base: all who flew less often in the last 12-month period than in a typical pre-pandemic 12 months (n=1,501).

ATOL

As in 2021, almost two-thirds of respondents believe their last holiday was ATOL-protected

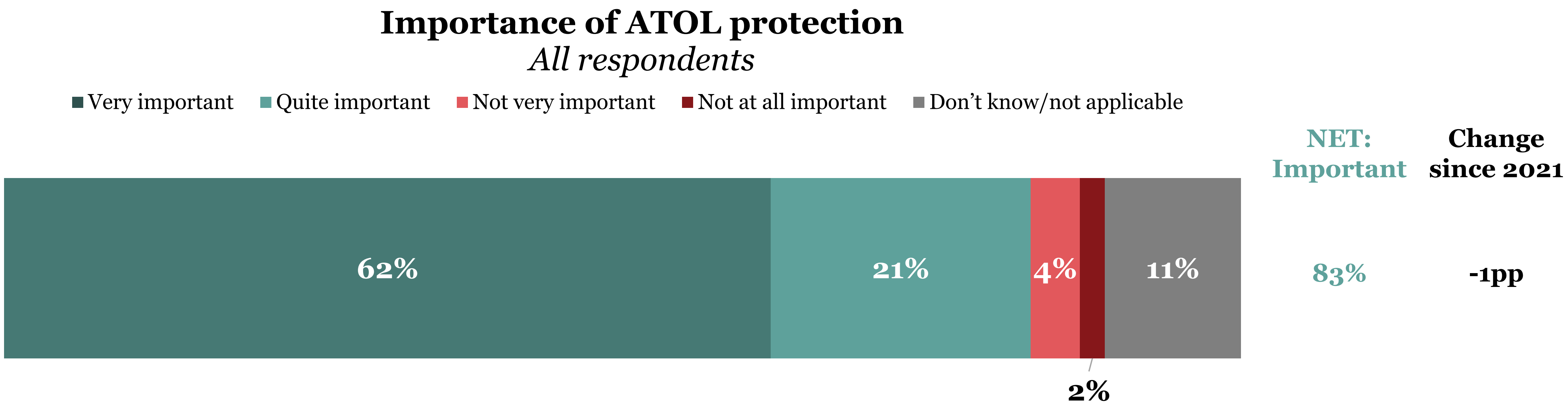


Consumers aged 18-34 are significantly more likely to say they think that their last holiday was *not* ATOL protected than older groups (23% vs. 17% amongst both 35-54s and those aged 55 and over). Younger consumers are also significantly more likely to say that they don’t know whether their holiday was ATOL protected or not.

Those with an annual household income under £50,000 are also significantly more likely to say that they are unsure if their most recent holiday was ATOL protected (21% vs. 11% amongst those with an income above this).

Q43. Was your last holiday ATOL protected? Base: all respondents (n=3,500)

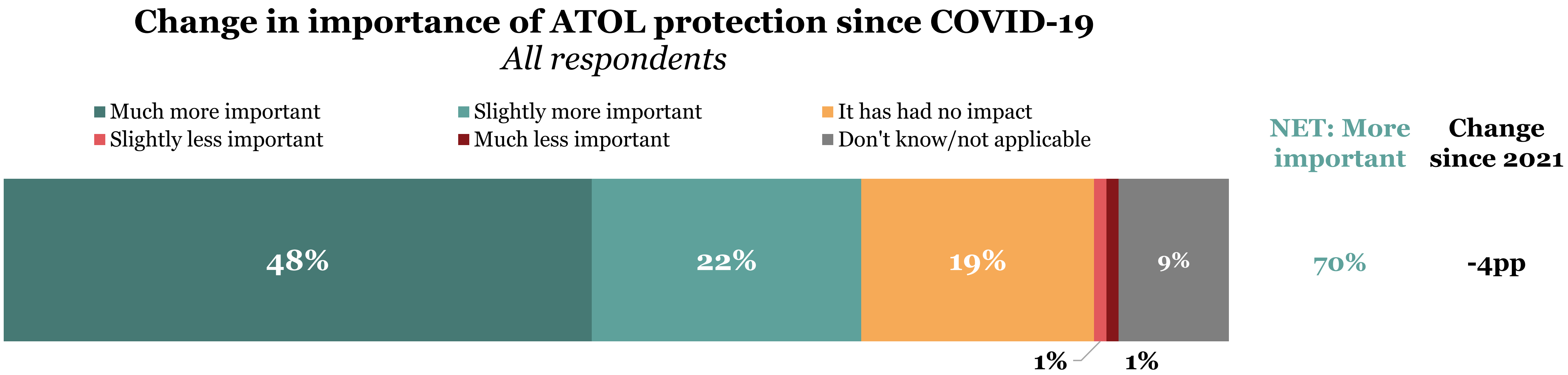
The majority of consumers think that it is important their holiday is ATOL protected



Age and income are again dividing lines here, with consumers aged 18-34 and those with annual household incomes of below £50,000 significantly **less likely** than older and higher-income consumers to say that their holiday being ATOL protected is important.

Q41. How important, if at all, is it that your holiday is ATOL protected? Base: all respondents (n=3,500).

7 in 10 consumers think that it is more important to have an ATOL-protected holiday since the pandemic



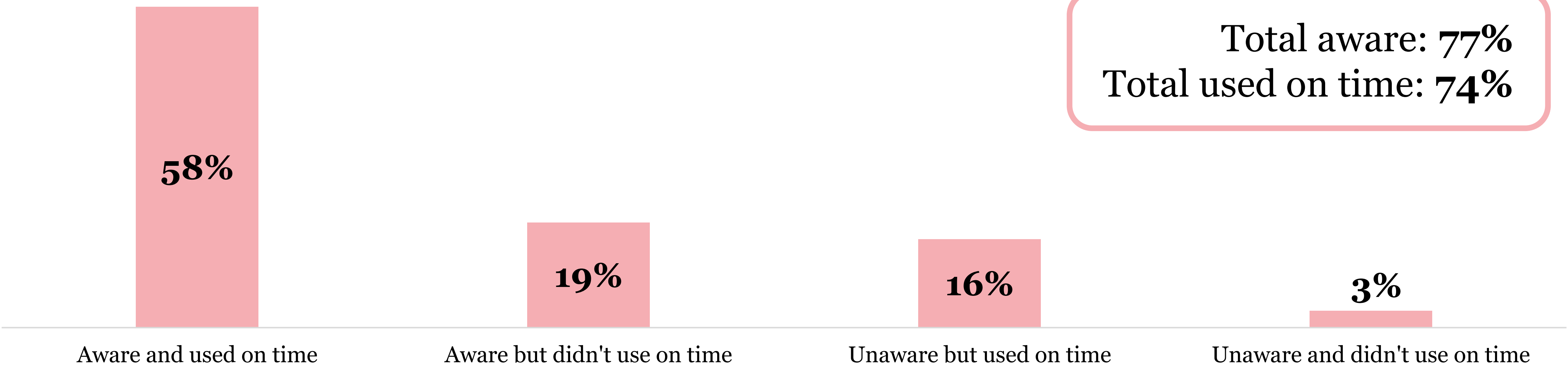
Again, consumers aged 18-34 and those with annual household incomes of below £50,000 are significantly **less likely** than older and higher-income consumers to say that a holiday being ATOL protected has become more important since the onset of the pandemic.

Q42. Do you think it is more, or less, important to have an ATOL-protected holiday since the COVID-19 pandemic? Base: all respondents (n=3,500)

3 in 5 who received Refund Credit Notes or vouchers for cancelled flights were aware that the ATOL protection on them was set to expire, and used them before expiry

514 consumers in our sample received a Refund Credit Note or voucher between 10th March 2020 and 19th December 2021 for flights cancelled due to COVID-19 restrictions. ATOL protection on these vouchers (not the vouchers themselves) expired on 30th September 2022.

Awareness among those who received RCNs of ATOL expiry on 30th September 2022:



Total aware: **77%**
Total used on time: **74%**

Q44. Did you receive an RCN / voucher instead of a cash refund between 10 March 2020 and 19 December 2021 for a flight(s) cancelled due to COVID-19 pandemic restrictions? Base: all respondents (n=3,500). Q45. The ATOL financial protection on refund credit notes (RCNs) / vouchers issued between 10 March 2020 and 19 December 2021 expired on the 30th September 2022. Which statement applies to you? Base: all who received an RCN or voucher (n=514).

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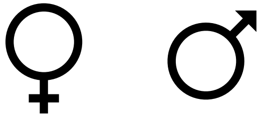
Appendix

Demographic (Weighted) Sample Profile

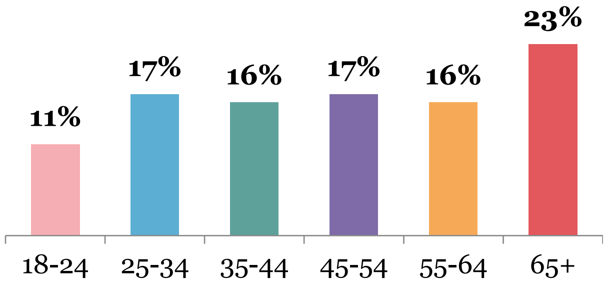
Gender



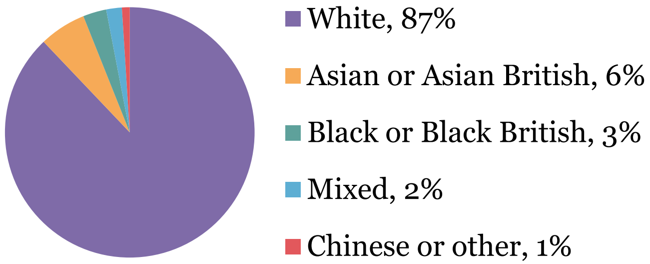
Female
51%

Male
49%

Age



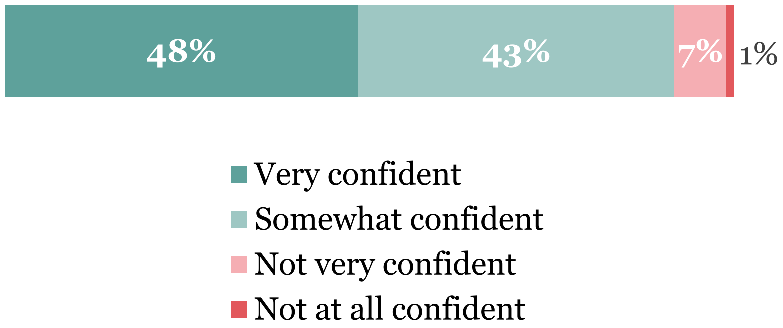
Ethnicity



Internet Access

94% of those interviewed by phone* have internet access

Digital confidence**



Base: All respondents (n=3,500); *All CATI respondents (n=500) **Defined with the following question: D5. Overall, how confident do you feel using computers, smartphones, or other electronic devices to do the things you need to do online?

Savanta:

Demographic (Weighted) Sample Profile

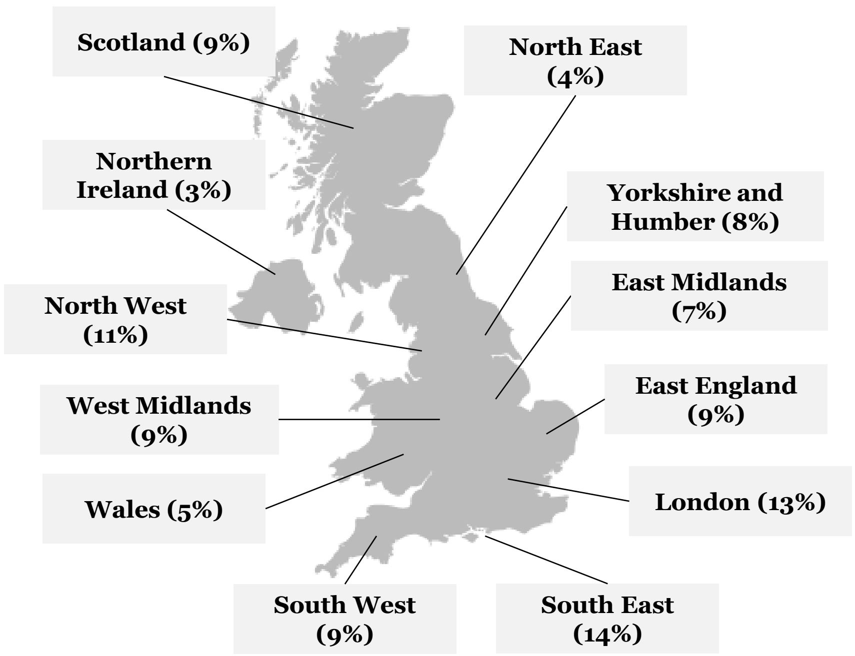
Working Status

Full time (30+ hours per week)	41%
Part time (8-29 hours per week)	16%
Part time (Under 8 hours per week)	2%
Not working	9%
Retired	24%
Homemaker	6%
Student / full time education	3%

Household Income

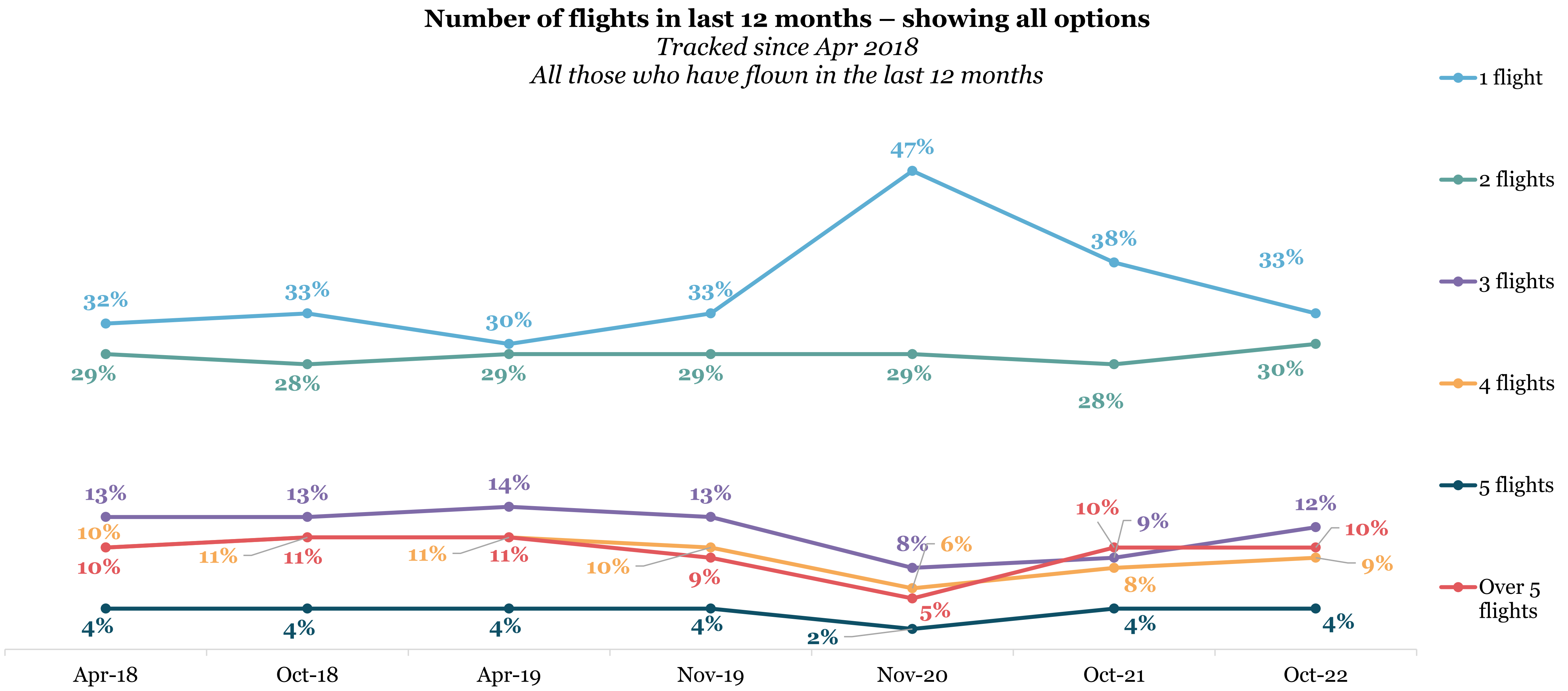
Up to £14,999	15%
£15,000 - £24,999	16%
£25,000 - £39,999	24%
£40,000 - £74,999	26%
£75,000 or more	11%

Regions



Base: All respondents (n=3,500).

The proportion of recent flyers who flew 2-4 times in the previous 12 months increases from last wave

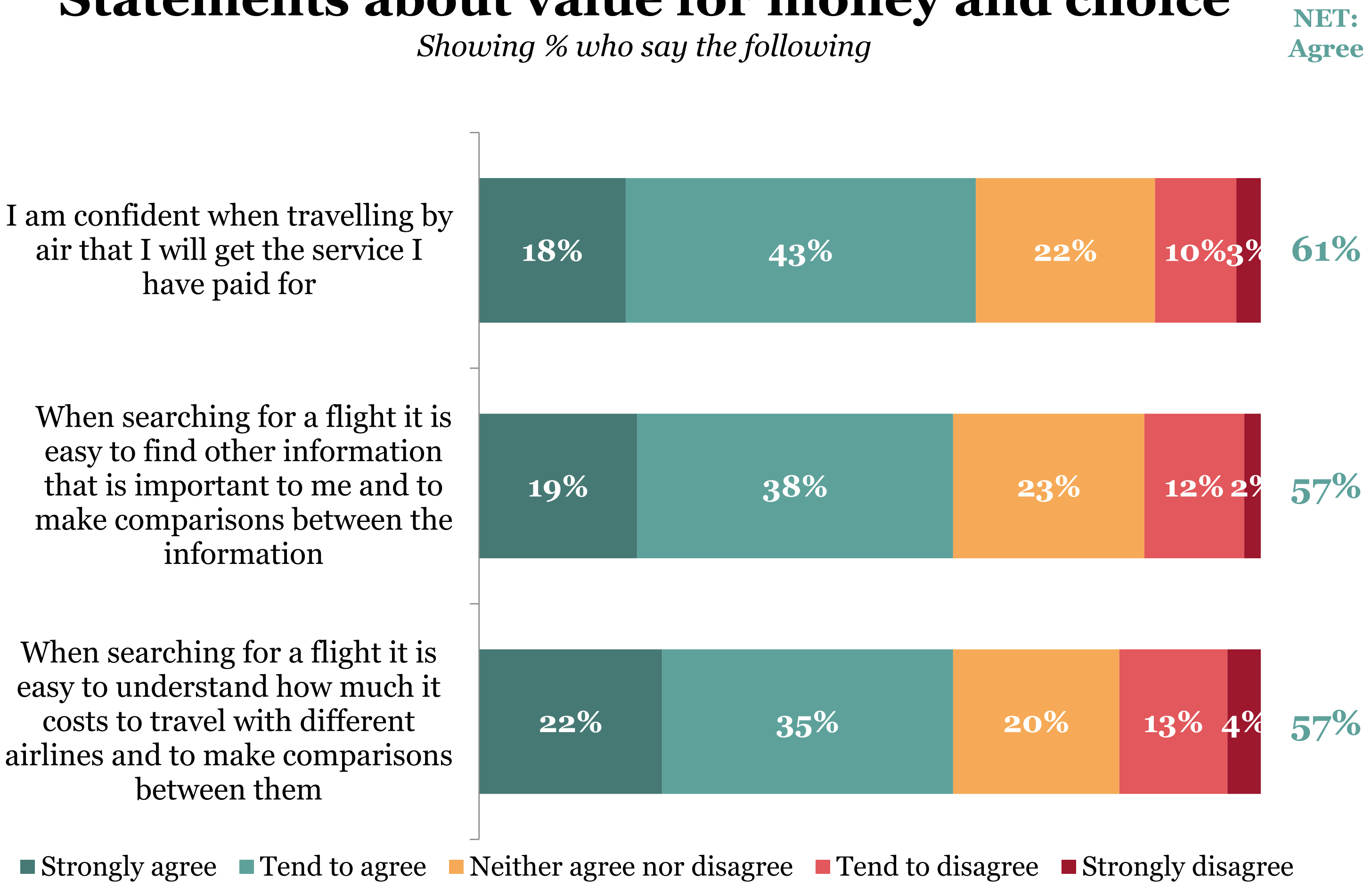


Q2. How many trips by air have you made in the last 12 months? Please count outward and return flights and any transfers as one trip If you are not sure then your best estimate is fine. Base: All respondents who have flown in the last 12 months (n=1,559 in Oct '22).

Q21: Regional analysis – Part 1

Statements about value for money and choice

Showing % who say the following



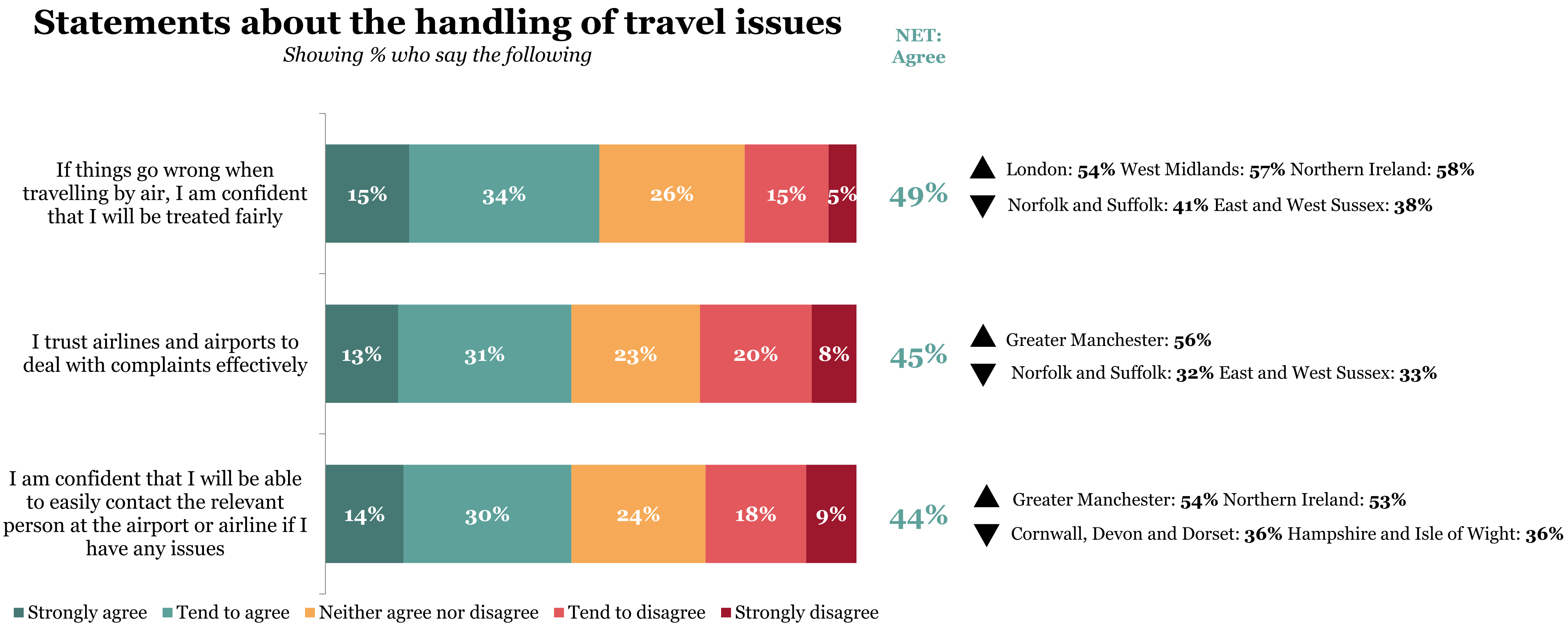
▲ London: **67%**
▼ Hampshire and Isle of Wight: **51%**

▲ London: **67%** Greater Manchester: **66%**
▼ Norfolk and Suffolk: **46%** East and West Sussex: **44%**

▲ London: **71%** Greater Manchester: **67%**
▼ Norfolk and Suffolk: **43%** East and West Sussex: **44%**

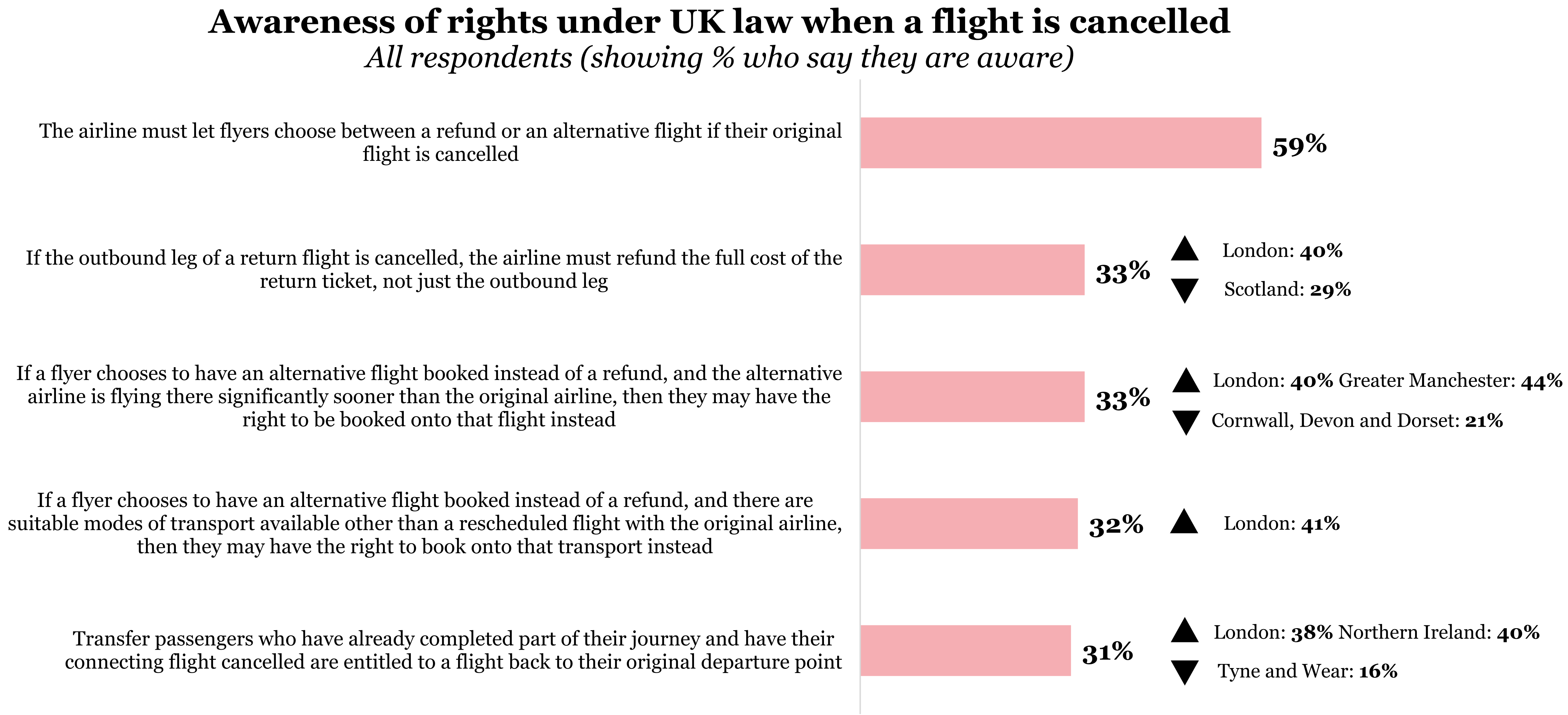
Q21. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3,500)

Q21: Regional analysis – Part 2



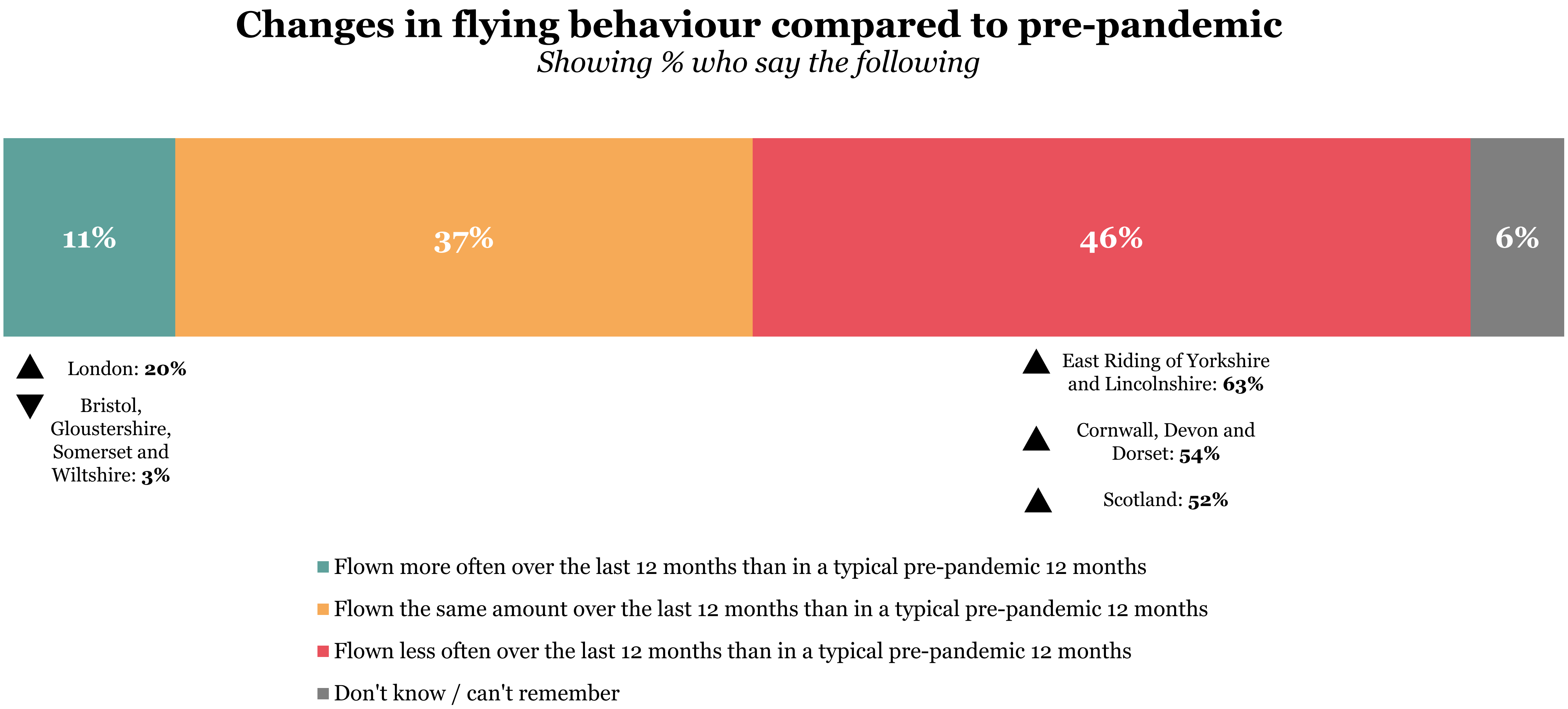
Q21. Please tell us to what extent you agree or disagree with each of the statements. Base: All respondents (n=3,500)

Q32: Regional analysis



Q32. Under UK law, if a flight is cancelled, the airline must let flyers choose between two options – either a refund on all parts of the ticket that have not been used, or an alternative flight. Please indicate if you were aware or unaware of the following before today. Base: all respondents (n=3,500).

Q35: Regional analysis



Q35. Thinking about the last 12 months, which of the following statements best describes how your flying behaviour has changed, if at all, compared to before the pandemic began in March 2020? Base: All who have flown previously (n=3,291).