Consumer research for the UK aviation sector – final report

CAP 1303

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CAA Foreword

Consumer Research

As part of our commitment to taking an evidence-based approach to regulation the CAA commissioned a substantial piece of qualitative and quantitative research to:

- provide insights on the behaviours, needs and concerns of consumers, including vulnerable and disadvantaged groups, and infrequent/non-flyers;
- identify areas where provision of new/additional information could facilitate more informed decisions by consumers; and
- explore the under-researched attitudes towards air travel safety and security.

The research findings were based on a mixed online and telephone survey of 3,000 consumers across the UK between mid December 2014 and mid January 2015.

There were a number of positive findings from the study:

- high level of overall satisfaction
- in most cases, aviation-related issues are not preventing people from travelling by air – main barriers are circumstantial factors (e.g. budget constraints, flying not an option) and preference for other modes;
- consumers appear to be reasonably well-informed and equipped to make air travel choices;
- high levels of satisfaction reported by passengers with restricted mobility and disabilities who have requested assistance from airports/airlines; and that
- confidence in aviation safety and security standards is generally high.

However, the research findings also highlighted some issues where further research would be valuable in helping guide the CAA's response. These included:

- use of price comparison websites was relatively low compared to other markets and some of those who shopped around found purchase/comparison process confusing;
- consumers are not always provided with clear information that maybe important to them before, during and after their journey;
- for consumers with restricted mobility or a disability, access issues were cited as a reason for not flying by a substantial proportion (~40%), and of those who had flown in the last 12 months, around one-third were uncertain that their needs would be met, with only a similar proportion actually requesting assistance for their journey;

- a significant minority (around a quarter) of consumers were dissatisfied with the information and assistance provided when problems occur before or during their journey; and that
- consumers have difficulties seeking redress when things go wrong, reporting high levels of dissatisfaction (40%) with complaints handling.

Consumer research has a key role in providing insights that, in conjunction with other indicators, allow the CAA to identify the risks that consumers may face due to information and/or market imperfection, and improve our understanding of future trends and developments which may impact consumer outcomes.

This report is supported by a detailed report of the qualitative stage of the research: CAP1304 CAA consumer research for the UK aviation sector - report of the qualitative stage.

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Consumer research for the UK aviation sector

Final report

Prepared for:

Civil Aviation Authority

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1. Executive summary

1.1 Introduction

This research has been commissioned to assist the CAA in the development of its 2016 strategic plan by ensuring that current consumer behaviours, needs and attitudes are fully understood. The specific objectives were to:

- Update the evidence on how consumers make air travel decisions, what information they use and value, and what if any gaps in provision there may be;
- Explore the hitherto under-researched topic of atttitudes to air travel safety and security; and
- Provide insights into the views and experiences of people who have disabilities or reduced mobility when travelling by air, as well as infrequent and non-flyers.

Both qualitative and quantitative methods were used in this research:

- The qualitative phase was held in London, Manchester and Bristol in mid-late November 2014, and comprised 6 focus group discussions with recent flyers, 8 face-to-face interviews with people with reduced mobility when travelling by air (or PRM – refer to Footnote 3 for more information), and 6 telephone interviews with non-recent flyers (the total qualitative sample was 61).
- The quantitative phase was a mixed online and telephone survey of 3,000 consumers across the UK which was conducted in mid December 2014 to mid January 2015.

1.2 Key findings

1.2.1 Air travel experience

Similar to other research[1], this survey found that just under half of the UK population (49%) have flown within the last 12 months and therefore can be regarded as 'recent flyers' according to the CAA's definition.

Non-recent flyers break down into 18% who flew between 1 and 3 years ago, 14% who flew 4-10 years ago, 10% who flew more than 10 years ago and 8% who have never flown. As such, fewer than one in ten can be considered to be true 'non-flyers', although some people's flying experience is relatively historic.

In addition, not all non-recent flyers can be regarded as consistently 'infrequent'. Of those who flew most recently within the last 1-3 years, 19% made 3 or more trips during this time and therefore were regular flyers in the recent past.

[1] For example, Department for Transport (July 2014): *Public experiences and of, and attitudes towards, air travel:* https://www.gov.uk/government/statistics/public-experiences-of-and-attitudes-towards-air-travel-2014

A total of 22% self-defined as having a disability or long-term health condition that makes accessing and/or using airports or flying difficult. This is a higher incidence of this group than has been recorded in some earlier CAA surveys. The difference is likely to be based on two factors:

- This question was asked of all consumers including non-recent flyers in the current survey (some of the CAA's previous surveys were conducted at airports and therefore represented recent flyers only); and
- The current question wording specified both physical and non-physical health conditions and listed some examples of each, so is likely to have been more inclusive as a result.

It should also be noted that the question on disabilities and health conditions in this and other past CAA surveys does not measure all those with disabilities and health conditions, but just those for whom this is felt to impact on their access and/or use of airports and flying[2].

Fewer than 40% of people with disability or health-related air travel access issues are recent flyers: 39% flew in the last year, 50% flew less recently and 10% have never flown.

Overall, most people (61%) expect that their flying behaviour will remain consistent over the next year. Of those who anticipate a change, more say that they will fly more (21%) than less (8%).

1.2.2 Understanding non-recent flyers

Concerns or problems related to air travel appear to be a much less significant barrier to flying compared to circumstantial factors and personal preferences. Budget constraints were the main reported reason overall for not flying in the last 12 months (mentioned by 47%).

Concerns about air travel were only mentioned by 8% as a reason for not flying. Some people for whom this was a barrier mentioned safety concerns specifically, but others referred to 'not enjoying flying' for other reasons or generally.

Other specifically aviation-related barriers were mentioned by even fewer – these included access difficulties (6%), environmental concerns (4%), and previous poor experiences (2%).

Access was, not surprisingly, more likely to be one of the barriers mentioned by those who subsequently identified themselves as having a disability or health condition that makes accessing and/or using airports or flying difficult. When these respondents were subsequently asked specifically whether access issues were a reason for not flying

[2] The Family Resources Survey provides the total incidence of the disabled population within the UK: https://www.gov.uk/government/statistics/family-resources-survey-2012-to-2013).

within the last 12 months, 42% of those with restrictions due to a physical disability and 35% of those with restrictions due to a non-physical condition stated that they were.

17% of non-recent flyers travelled abroad using another transport mode over the last 12 months. The remainder presumably either only travelled domestically or did not make a trip by air within that period.

1.2.3 Air travel decision-making and choice factors

The qualitative research revealed that choice factors for travel decision-making are varied and complex. It also found that flight-related choices may be a relatively less important and considered part of travel decision-making compared to factors related to the holiday type or destination.

The survey intentionally focused on air travel decisions specifically and it found that the ‘departure airport’ was second only to ‘price’ as a consideration for recent flyers in choosing their flight. Each was mentioned by a majority as being ‘very important’ (67% for price, 58% for departure airport). The key driver for the selection of a particular airport to depart from is that it is easy to get to.

Among those prioritising price, getting good value was more important than accessing the cheapest fare. Only a minority of price-conscious consumers said that they did ‘a lot’ of shopping around (29%), and some did ‘little or none’ (18%) indicating a level of inconsistency between attitudes and behaviour that was also apparent in the qualitative research. That said, just over half (52%) of those who prioritise price said that they made some sort of trade-off to secure a lower cost fare.

The ‘airline or holiday company’ emerged as the lowest priority overall when choosing a flight (a ‘very important’ consideration to only 29%), behind the ‘flight schedule or route’ (‘very important’ to 47%). Those who consciously prioritised this factor said that familiarity with the carrier, and its reputation for providing low cost fares and/or good customer service, were paramount considerations.

However, the carrier may be a more important influence than flyers realise as by far the main booking channel used (by almost two-thirds) was the airline or holiday company website. In addition, as highlighted in Section 1.2.6, information from suppliers was reported to be second only to the flyer’s own experience in importance as an information source.

Three-quarters of flyers in the last 12 months used an online channel to book their most recent flight (65% an airline or holiday company website and 11% a price comparison site). Offline booking sources were much less used overall, but they were important to package holiday buyers, those aged 65+ and PRM.

Most booked either 4-12 months (41%) or 2-3 months (37%) before travel, while one in five booked within one month of departure (19%). The tendency was to book closer to the date of travel for domestic trips and further ahead for long-haul journeys.

Overall, the majority used a private vehicle to reach their UK departure airport (34% drove and parked, 24% received a lift), followed by a taxi (22%) and public transport (18%). It was most common to decide this at the time of booking (48%) or sometime before departure (45%). However, domestic flyers were more likely than average to decide on their transport at point of booking (56%), and business flyers to have left this decision until the day of flight (13%). Most (65%) claimed to be fully aware of the transport options at the point of booking.

1.2.4 Satisfaction with the air travel experience

There was a high level of reported satisfaction among flyers in the last 12 months with their most recent flight. The average satisfaction score was more than 4 out of a maximum of 5, and 37% gave the top score.

However, the qualitative research suggests that while satisfaction may be high, expectations of the travel experience are generally low and therefore being satisfied may not mean that the flight experience was of particularly high quality. The association of air travel with the excitement of travel and, in most cases, with the commencement of holidays may have a halo effect that is positively influencing satisfaction with the flying experience itself.

Overall, 10% experienced a disruption on their most recent flight within the last 12 months – for 9% it was a delay and 1% a flight cancellation. The majority were satisfied with the handling of the issue – the average satisfaction score was 3.5 out of 5 for the information provided and slightly lower at 3.3 out of 5 for the assistance offered.

14% of those who have flown at any time previously have ever complained about an aspect of their journey. This was mainly because of delays or customer service issues, and the main channel for complaints was the airline (70% complained here).

Satisfaction with complaints handling was lower than for the handling of disruptions – the average rating was less than 3 out of 5 and fewer were ‘very satisfied’ (17%) than ‘very dissatisfied’ (29%).

1.2.5 Travel experience and expectations of PRM

Throughout the rest of this document, for ease of drafting, the abbreviation ‘PRM’ is used to refer to all of those respondents who identified themselves as having either a disability or long-term health condition that affects their access and/or use of airports or flying (they answered yes to Q11a - see Appendix 2 for details the questionnaire). Further, those passengers who were travelling with a companion who would fall under either the PRM or short-term mobility restricted definitions above were also identified separately (Q17a and Q17b)[3].

[3] These passengers are covered by the regulation EC1107/2007, which aims to ensure such people have the same access to air travel as other passengers. Article 2(a) of the Regulation defines‘ disabled person’ or ‘person with reduced mobility’ as meaning any person whose

A total of 18% of recent flyers identified themselves as PRM – 10% have physical conditions, 7% have non-physical conditions and 1% has both. In addition, 5% of flyers in the last 12 months travelled with a PRM companion on their most recent flight, and 5% themselves had a short-term health issue. The net total of all of these groups combined is 25% of all recent flyers that were affected by some sort of health condition that impacted their access to or use of air travel over the last 12 months.

A significant finding from the qualitative research was that accessibility barriers do not just relate to physical access or mobility restrictions. People whose access issues are related to mental health conditions and cognitive disabilities required help and support to access air travel because they can encounter numerous issues when travelling by air. These include anxiety, strong personal preferences, difficulty interacting with people, difficulty processing and retaining information, difficulty navigating spaces etc.

Overall, the attitudes of PRM did not vary substantially from that of other respondents in most cases, however, wherever differences occur, these have been highlighted throughout the report. In addition, a number of specific questions about use of, and satisfaction with, assistance were asked.

Of all PRM, 38% requested assistance and this was mainly at the point of booking. Most likely to have accessed assistance were those whose companion had a health-related access restriction (49%), those with long-term physical conditions (47%), and people with short-term health issues (45%). Conversely, those with long-term non-physical conditions were much less likely to have requested assistance (17%).

Those who used assistance during their most recent journey over the last 12 months tended to be very satisfied with the experience. All aspects measured received an average satisfaction score of more than 4 out of 5, with the highest ratings overall received for UK airports. This aligns with the qualitative research that found that those who accessed assistance were generally very grateful for its provision and happy with the service provided.

In addition, all PRM, even if they have not flown recently, had high expectations that their assistance needs would be dealt with appropriately if and when they next fly. However, those whose air travel experience is more historic or have never flown were less able to answer indicating that these groups may require particular targeting so they are aware of the options available to them.

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mobility when using transport is reduced due to any physical disability (sensory or locomotor, permanent or temporary), intellectual disability or impairment, or any other cause of disability, or age, and whose situation needs appropriate attention and the adaptation to his or her particular needs of the service made available to all passengers. Where passengers had short-term mobility restrictions these have been identified separately for these purposes (those answering yes to Q17b in the questionnaire).

1.2.6 Information needs and consumer issues

The qualitative research found that most people generally felt well informed and equipped to make air travel decisions. However, consumers' actual behaviour varied, with most in the qualitative research limiting their market comparisons, meaning they could potentially make sub-optimal choices as a result. In addition, the comparison process was sometimes not regarded as transparent or easy to navigate due to 'hidden' costs.

In the survey, most of those who had previously flown felt well informed with respect to making most air travel decisions and executing tasks. Flyers felt particularly well equipped to compare deals on the market (average informed score of 3.7 out of 5) and to prepare for their trip (3.8 out of 5). Most were also confident with using the internet for shopping around for (average confidence score of 3.7 out of 5) and booking flights (3.8 out of 5).

The one area they were slightly less certain about was their rights as a consumer if something goes wrong (average informed score of 3.3 out of 5).

In addition, there were certain groups that felt less informed and/or confident:

- Non-recent flyers – about all aspects (likely to relate to not being able to draw on recent flying experience).
- 16-24 age group – about their rights and preparing for their trip (likely to relate to having less life and travel experience).
- 65+ age group – with comparing the market and completing online tasks (likely to relate to lower online access).
- PRM – about preparing for their trip (likely to relate to them having more complicated and specific needs).
- PRM with physical health conditions – with online tasks (this could be related to this group tending to be older than average).

Past flyers were most likely to draw on their own personal experience to make decisions; they also used suppliers' information, online market comparisons and reviews, and informal advice from friends and family.

Significantly, and in line with the qualitative research, most consumers did not themselves identify gaps in available information or indicate an appetite for more or additional information. Therefore, even though there may be areas in which consumers could benefit from additional information (including those highlighted in the preceding bullet points), the majority of consumers do not identify this themselves.

A specific question was also asked about views on extending insolvency protection to companies selling flights only, and which are not currently covered by insurance for the potential eventuality of them going out of business. Once informed about the current state of play, there was a consensus that this protection should be provided and the majority felt this should be both to offer repatriation and refund (57%). However, one-third (33%) did not know if and how much they would themselves be prepared to pay to fund this cover, and almost one in four (23%) said they would not be prepared to pay anything.

1.2.7 Attitudes to safety and security

The qualitative research found that safety and security did not appear to be influencing behaviour in most cases. However, these are sensitive topics and there was a reluctance to discuss them in detail. A number did not want more information about safety or security because it was felt that engaging with this may make them feel less safe.

As such, the quantitative survey was designed to explore views on safety and security initially in an unprompted way so as not to overly sensitise respondents or risk over-inflating the level of concern.

In the quantitative research, of those with some previous flying experience, 36% say they don't think about safety much, while 28% say that they are nervous flyers.

Notwithstanding these differences, there is a high level of confidence in safety and security standards across the board – 70% of the entire population (which includes those who have never flown) agree that standards are higher now than they were 4-5 years ago, 58% consider that air travel is safer than other modes of transport and 54% say that standards are as high as they can be.

In addition, most flyers with some previous experience of security procedures (59%) feel that the right balance has been struck between screening and convenience to passengers.

Of the remainder who did not agree with the safety and security statements above, most opted not to express a view rather than being in active disagreement with any. This fits with the qualitative research finding that there is a reluctance to engage with aviation safety and security issues by some consumers.

However, there is one area where views are more mixed – almost half (49%) agree that a lack of consistency in security procedures sometimes concerns them. The qualitative research found that these concerns related to perceived inconsistency between different airports (particularly those situated in certain other countries compared to the UK) and sometimes also within the same UK airport (e.g. related to differences in approaches by individual staff).

Nonetheless, there is not an overwhelming appetite for more information on safety and security. While 39% would be open to this only 11% agree strongly, while 21% actively disagree that more information would be of interest. In the qualitative research, some people felt that receiving more information in this area would have the effect of making them more fearful. Views on two specific information options presented to participants in the qualitative research (safety ratings and airlines which are barred from operating within the EU) were mixed.

Confidence in safety and security standards has a strong positive correlation to the recency and frequency of travel. On the other hand, little difference in attitudes towards safety and security has been found between the interviews conducted before and after the Air Asia crash on the 28 December 2014.

For the majority, views on safety and security have not had any effect on behaviour. However, 12% of past flyers say they have made changes, such as reducing the frequency or restricting the types of flights they have made, as a result. In addition, 10% of those who have never flown say that safety concerns are a major reason for not flying, and another 13% say these are a minor factor.

1.2.8 Role of the CAA

Awareness and perceptions of the role of the CAA were only explored in depth in the qualitative research. This is because awareness was found to be so low that a considerable amount of information was required to be given about the CAA before participants in the qualitative research could make an informed comment about the regulator and its role. This level of priming would not have been feasible in the survey.

People tended not to think too much about who is responsible for safety and security, because this is not a topic that many felt comfortable discussing or thinking about in detail.

When prompted, participants believed that there is an official body responsible for safety and security standards in the UK, and some limited awareness of the CAA.

Once informed of the CAA’s role, there was general support for the safety and security aspects, although very little desire to know more about its role overall – it was expected to remain a ‘behind the scenes’ regulator.

There was some confusion as to how the CAA could enforce its role in protecting consumer interests and a feeling that this must be secondary to its safety and security role.

One exception to this was the CAA’s role in ensuring PRM have equal access to air travel – this was strongly supported by those directly affected and a more high-profile, customer-facing role could be imagined for CAA in relation to upholding this group’s rights and receiving complaints.

The qualitative work indicated there was very little understanding of the CAA’s environmental remit and this was felt to be much less important than the other aspects of its role, reflective of the low personal priority most appeared to place on the issue relative to the other aspects of the CAA’s work.

1.3 Conclusions

To fulfil its duties to consumers it is important that the CAA:

- Continues to develop its understanding of the behaviours, needs and concerns of consumers, including vulnerable and disadvantaged groups, and infrequent /non-flyers;
- Further explores how consumers and the public make choices so that the provision of relevant information could facilitate more informed decisions by consumers in the air travel market; and
- Ultimately, uses these insights to focus its activities on the areas that present the greatest risks to consumers and the outcomes they value.

The findings summarised in this chapter and presented in more detail in the body of this report provide a comprehensive evidence base on the attitudes, behaviours and needs of UK consumers with respect to aviation. This includes specific insight into how consumers make air travel decisions and the information that supports this. In addition, consumers' views on the newest area of the CAA's remit, aviation security, have also been collected along with perceptions of safety standards. Any sub-group differences of note have been highlighted, particularly with respect to the key audiences of interest to the CAA.

Specifically, this research provides some additional guidance on how the CAA should define and understand certain groups. For example, it shows what subset of non-recent flyers could be considered 'infrequent' and 'non-flyers', and what proportion of PRM have physical issues likely to affect mobility, compared to other health conditions that affect access and use of air travel in different ways.

Another important finding from this research is that in most areas it appears that the market and existing regulation are working well for consumers. For example:

- In most cases there are not aviation-related barriers preventing people from flying.
- Consumers in general feel well informed and equipped to make air travel choices.
- PRM who have received assistance are very satisfied with this.
- There is generally a high level of confidence in aviation safety and security standards.

However, there are some areas where the CAA would be advised to look further and to consider whether additional information remedies or other interventions may be of benefit. These include:

- The extent to which access emerged as a barrier, upon prompting, for PRM who have not flown recently; this is potentially because PRM without recent flying experience are less aware of the assistance options available to them.
- That people generally feel less informed than in other areas related to aviation (e.g. how to search the market and make choices) about their rights as a consumer and how to get redress if required.
- That there are also particular groups who feel comparatively less well informed and confident; these include the youngest and oldest consumers as well as PRM and those who have not flown recently.
- The concern expressed that security procedures are not consistent.

In addition, although consumers are generally satisfied with the experience of air travel, there are indications from the qualitative research that this is in part related to low expectations, and therefore not necessarily reflective of the objective quality of the experience. This indicates the value in the CAA collecting objective quality metrics to accompany data from public perception surveys.

The CAA is currently not well known by consumers as an organisation and it may need to build its public profile if it is considering any directly consumer-facing interventions in these or other areas.

There is also a particular challenge in potentially providing more information on safety and security. The public themselves are very ambivalent about this prospect, with many reluctant to engage in the topics. Consumer reactions in this research indicate that an unintended consequence of further safety and security information could actually be to elevate rather than alleviate consumers' concerns about their safety and security when travelling by air.

Some further recommendations can be found in Appendix 4 about which questions would be most suitable for the CAA to use in the future tracking of consumer atttitudes and behaviour.

2. Introduction

2.1 Background

The CAA is the UK's independent aviation regulator and, across all of its remit, it places the interests of the public at the heart of its work.

While relatively recent data are available on consumers' air travel behaviour and experiences, rapid changes in the market environment and use of technology mean that previous research can become quickly outdated.

In addition, the CAA has recently been given new responsibilities for the regulation of aviation security and it needs to develop a detailed understanding of consumers' attitudes to security as well as to monitor public perceptions of aviation safety.

Finally, there is a gap in the evidence base on the views and concerns of who have disabiltiies or reduced mobility when travelling by air, and people who have not flown recently, that the CAA is looking to address.

2.2 Aims and objectives of this research

This research has been commissioned to assist the CAA in the development of its new strategic plan by ensuring that current consumer behaviours, needs and attitudes are fully understood. The CAA particularly required this research to:

- Update the evidence on how people make air travel decisions, what information they use and value, and what if any gaps in provision there may be;
- Explore the hitherto under-researched topic of atttitudes to air travel safety and security; and
- Provide insights into the views and experiences of people with reduced mobility when travelling by air (PRM), as well as non-recent flyers.

2.3 Methodology

This research used both qualitative and quantitative methods, as outlined below:

2.3.1 Qualitative stage

The qualitative phase comprised 6 x 90 minute focus group discussions, each with 7-8 recent flyers, 8 x 60 minute face-to-face interviews with people with health related access restrictions, and 6 x 45 minute telephone interviews with non-recent flyers. The qualitative research was conducted in London, Manchester and Bristol between 13 and 20 November 2014, and a total of 61 consumers were involved in this stage. More detail on the qualitative research method is provided in Figure 1 below:

Figure 1

The main focus of the qualitative phase was to 'deep dive' into consumers' perceptions and understanding of the safety and security issues around flying. This included exploring whether or not these issues are front-of-mind and have a bearing on air travel decision-making, as well as views, upon prompting, on safety and security standards and the role of the CAA. In addition, the reasons non-recent flyers have not flown were fully explored, as were the experiences of PRM.

2.3.2 Quantitative stage

The quantitative phase was a mixed online and telephone survey of 3,000 consumers across the UK which was conducted between 10 December 2014 and 10 January 2015. The telephone element was focused specifically on those (predominantly older people) without the internet at home. Quotas were set so that the sample is representative of the UK adult (16+) population, including demographically (by age and gender), and according to internet usage at home. All quotas were set based on latest publicly available ONS data[4]. In addition, the fieldwork was closely monitored to ensure responses were representative of other population variables (e.g. geographically and by socio-economic group). The quantitative method is also summarised in Figure 2 below. Full profiling data on respondents is contained in Appendix 1.

Figure 2

The purpose of the survey was to provide robust and representative data on air travel behaviour, decision-making factors, key aspects of the experience and attitudes to safety and security. The full questionnaire is contained in Appendix 2. The average completion length of the survey was 15 minutes, but this increased to almost 20 minutes among those who have flown in the last year and who were asked additional questions about this experience.

2.4 Structure and contents of this report

This report focuses on the main findings from the quantitative survey. Relevant qualitative insights are also included, but more detail from the qualitative research

[4] Links to relevant quota data below:

http://www.ons.gov.uk/ons/rel/pop-estimate/population-estimates-for-uk--england-and-wales--scotland-and-northern-ireland/2013/index.html

http://www.ons.gov.uk/ons/rel/rdit2/internet-access-quarterly-update/q1-2014/index.html?translation-component=&calling-id=77-6175-4&currLang=English&format=normal

(including all the research materials from this phase), is provided in a separate qualitative report[5].

2.4.1 Report sections

The chapters to follow in this report have been structured as follows:

3. **Air travel experience *(all consumers)*:** Details of consumers' previous flights; expected trends in flying; and the overall incidence of PRM.
4. **Understanding non-recent flyers *(non-flyers in the last 12 months)*:** Barriers to flying; and the extent to which they have travelled abroad using another mode of transport.
5. **Air travel decision-making and choice factors *(flyers in the last 12 months):*** Considerations in their most recent choice of flight; booking the flight; and getting to the airport.
6. **Satisfaction with the air travel experiennce *(flyers in the last 12 months/all flyers):*** Overall satisfation; experience of previous disruption or making a complaint.
7. **Travel experience and expectations of PRM *(flyers in the last 12 months/ PRM flyers in last 12 months /PRM flyers at any time previously):*** Identification of all those recent flyers with health-related access restrictions affecting themselves personally or their companions; use of, and satisfaction with, assistance; expectations of assistance of PRM who have ever flown.
8. **Information needs and consumer issues *(all flyers):*** How well informed consumers feel about various aspects of air travel; how confident they feel using the internet for air travel related tasks; relative importance of different sources of information; views on insolvency protection.
9. **Attitudes to safety and security *(all flyers/all consumers):*** Qualitative insights on how front-of-mind safety and security are for consumers are and extent to which they are decision-making considerations; views on attitudinal statements on safety and security; whether attitudes to safety and security have affected flying behaviour; whether airline leasing is a safety concern.
10. **Role of the CAA *(all flyers):*** Qualitative insights on consumers' awareness of the CAA and their expectations of the CAA with respect to safety and security standards and other consumer issues (this was not covered in the survey).

2.4.2 Guidance on interpreting the report

This report includes data charts to accompany the narrative analysis. All sub-group differences identified are statistically significant[6]. Most sub-groups reported on are

[5] CAA Consumer Research - Report of the Qualitative Stage, December 2014.

based on 100 or more responses; any samples between 50 and 100 are marked and no findings based on fewer than 50 responses are reported on. In some cases aggregated findings are slightly greater or less than 100 due to rounding.

Any qualitative findings should be treated as indicative rather than definitive, but in this report we have mainly focused on qualitative insights that support and help to explain the quantitative data rather than standalone findings.

It is worth noting that the survey took place both before and after the Air Asia crash happened on 28 December 2014. Around two-thirds of responses were collected prior to 28 December and one-third after. This means we have robust samples both pre- and post- the accident and data are cut by date of interview when analysing attitudes to safety and security in particular.

2.4.3 Terminology

The definition of terms commonly used in the report are listed below:

- **All consumers** – everyone included in the survey
- **BME** – people from black and minority ethnic groups
- **ABC1/C2DE** – people from different socio-economic groups (ABC1 includes professional/managerial/supervisory occupations, C2DE includes manual occupations and non-workers)
- **All flyers** – everyone who has some past experience of flying (i.e. excluding those who have never flown)
- **Recent flyers** – those who have flown in the last 12 months
- **Non-recent flyers** – those who have not flown in the last 12 months
- **Frequent flyers** – those recent flyers who have flown 3+ times in the last 12 months
- **Business flyers** – those whose most recent flight was for business purposes
- **Leisure flyers** – those whose most recent flight was for a holiday, or to visit friends or relatives

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[6] All differences have been significance tested at 95% confidence intervals

- **PRM** (people with reduced mobility when travelling by air) – those who identified themselves as having either a disability or long-term health condition that makes accessing and/or using airports or flying difficult (those answering yes to Q11a in the questionnaire). In the charts in this report 'PRM Self' is used for those who are personally affected by a long-term health condition that restricts their access, and 'All PRM' to also include air travel restrictions related to short-term health conditions or a companion's health condition.

- **Previous disruption** – those recent flyers who incurred a delay or flight cancellation from their outbound UK airport when they last flew

- **Complainants** – those among all flyers who ever made a complaint in relation to air travel

- **Nervous flyers** – those among all flyers who agreed with the statement that: 'I am quite a nervous flyer'

- **Unconcerned flyers** – those among all flyers who agreed with the statement that: 'I don't think much about safety when I fly'

3. Air travel experience

3.1 Key findings

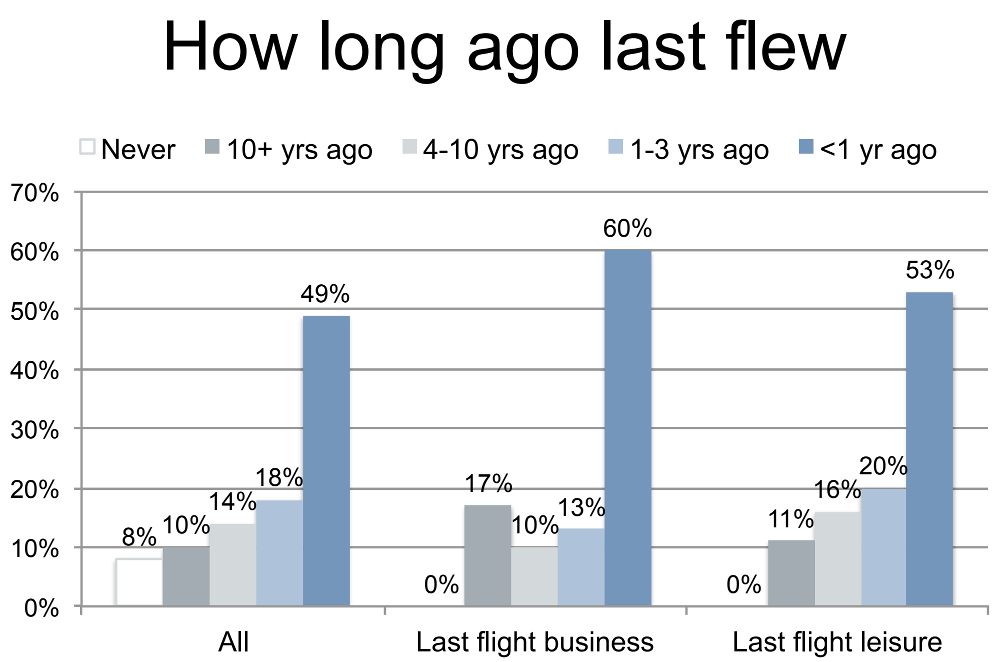
- A total of 49% of the UK population have flown within the last 12 months and can be regarded as 'recent flyers' according to the CAA's definition.
- Non-recent flyers break down into 18% who flew between 1 and 3 years ago, 14% who flew 4-10 years ago, 10% who flew more than 10 years ago and 8% who have never flown. As such, fewer than one in ten can be considered to be true 'non-flyers', although some people's flying experience is relatively historic.
- In addition, not all non-recent flyers can be regarded as consistently 'infrequent'. Of those who flew most recently within the last 1-3 years, 19% made 3 or more trips during this time and therefore were regular flyers in the recent past.
- A total of 22% self-defined as being PRM. This is a higher incidence than has been recorded in some earlier CAA research. The difference is likely to be based on two factors:
    - This question was asked of all consumers including non-recent flyers in the current survey; and
    - The current question wording specified both physical and non-physical health conditions and listed some examples of each, so is likely to have been more inclusive as a result.
- Fewer than 40% of PRM are recent flyers. Of those who regard themselves as PRM, 39% flew in the last year, 50% flew less recently and 10% have never flown.
- Most people (61%) expect that their flying behaviour will remain consistent over the next year. Of those who anticipate a change, more say that they will fly more (21%) than less (8%).

3.2 Recency of flying

Just under half of UK consumers (49%) flew within the last 12 months. This finding is almost identical to that contained in the most recent Department for Transport survey on air travel[7].

The remainder of the population (51%) break down into just under one in five (18%) who flew within the last 1-3 years, one in seven (14%) who flew between 4 and 10 years ago, one in ten (10%) who last flew more than 10 years ago, and just under one in ten (8%) who have never flown. Not surprisingly, those whose last flight was for business were more likely to have flown in the last 12 months.

Figure 3



Q6 When was the last time you flew from a UK airport? This could have been either to travel within the UK or to go abroad. Base: all (3,000)

In addition to business flyers, those residing in London (62%) and those from higher (ABC1) socio-economic groups (57%) are each more likely than average to have flown within the last 12 months. Conversely, PRM due to a physical disability (34%), those from C2DE socio-economic groups (38%), and those aged 65+ (38%) are less likely to have been a recent flyer.

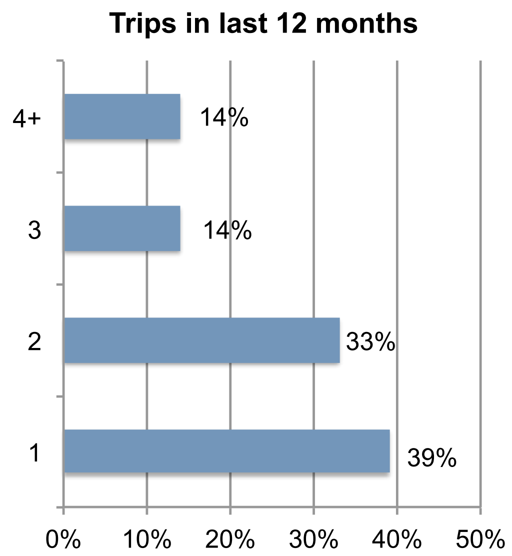
[7] Department for Transport (July 2014): *Public experiences and of, and attitudes towards, air travel.* https://www.gov.uk/government/statistics/public-experiences-of-and-attitudes-towards-air-travel-2014

3.3 Frequency of flying

Of those who have flown within the last 12 months, almost two in five (39%) flew just once during this time, a further third (33%) made two trips, and just under three in ten (28%) made three or more trips. As such, the average number of flights made by recent flyers stands at just over 2 flights in the past year. Those who have made more flights than average during this time include business flyers, London residents and people from black and minority ethnic (BME) groups.

Figure 4

Flyers in last 12 months – frequency of trips



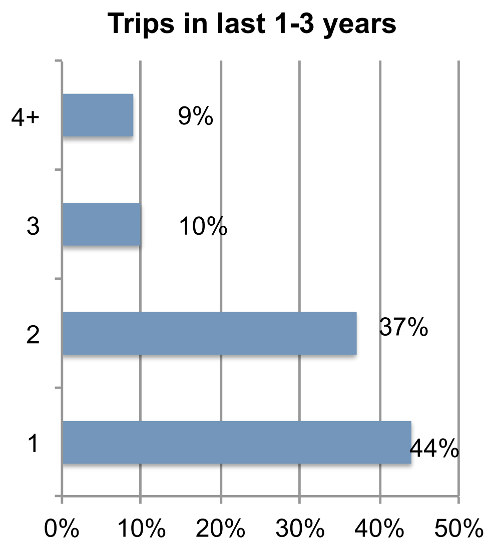
Average flights in past year	
	Mean
Total	2.18
Significantly **higher** among:	
Last flight business	3.35
London residents	2.87
BME (ethnicity)	2.48
Significantly **lower** among:	
SW England residents	1.75
Aged 16-24	2.00
C2DE (SEG)	2.02

Q7a How many trips by air have you made within the last 12 months? Please count outward and return flights and any transfers as one trip. Base: those flown in last 12 months (1,470)

Those who flew within the last 1-3 years were also asked how many trips they made by air over this period. The average was just under 2 trips, however one in five (18%) made three or more trips over this period. This finding indicates that not all non-recent flyers can be regarded as consistently infrequent flyers; some appear to have flown regularly historically but just not within the last 12 months.

Figure 5

Flyers in last 1-3 years - frequency of trips



Average flights in past year	
	Mean
Total	1.93
Significantly **higher** among:	
Aged 65+	2.06
Significantly **lower** among:	
Aged 45-64	1.77

Q7b How many trips by air have you made within the last 1-3 years? Please count outward and return flights and any transfers as one trip.
Base: all whose most recent flight was 1-3 years ago (546)

These findings are supported by the qualitative research which found that some 'non recent' flyers had previously flown quite frequently.

> *"I haven't flown in the past 3 years because I got a new job and we bought a house and had a baby and now we're expecting our second. Before that I lived in Australia for a few years and used to fly all the time. I really enjoy it but I just haven't recently."* (Infrequent flyer, Manchester)

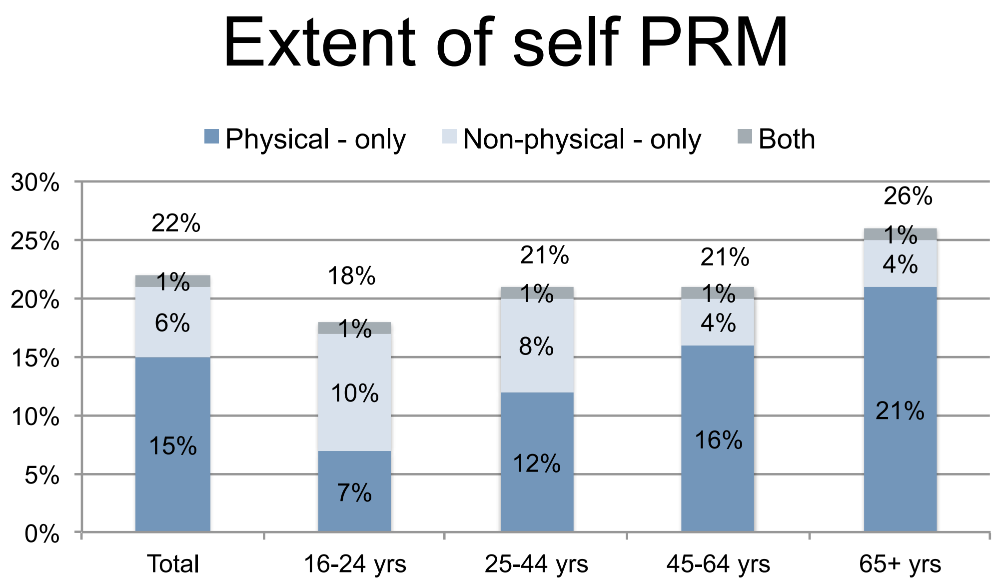
3.4 PRM

All consumers, whether or not they have flown recently, were asked whether they personally have a disability or long-term health condition that makes accessing and/or using airports difficult. In addition, for the first time in a CAA survey, a clarification to the question was added that 'this could include:

- A physical disability or health condition affecting the consumers' movement, balance, vision or hearing.
- A non-physical disability or health condition affecting the consumers thinking, remembering, learning, communications, mental health or social relationships.'

A total of just over one in five consumers (22%) self-defined as PRM in response to this question – 15% have a physical disability or health condition, 6% have a non-physical condition and 1% has both. Not surprisingly, such disabilities and health conditions are more prevalent among those aged 65+ (26% in total, 21% physical).

Figure 6



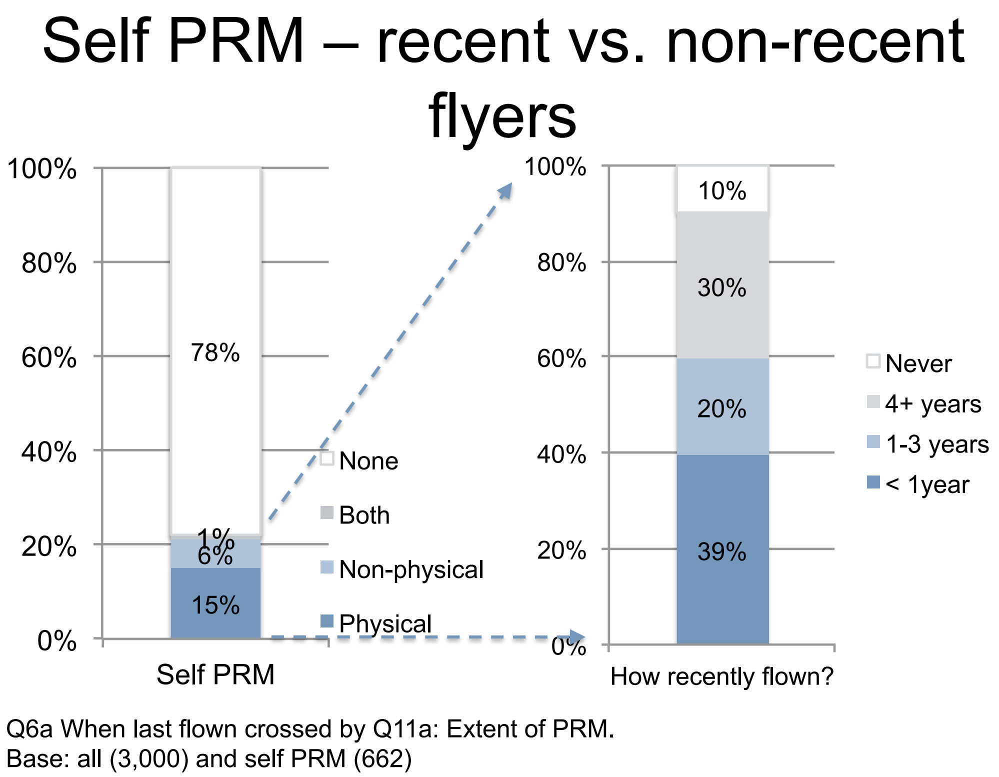
Q11a Do you have a disability or long-term health condition that makes accessing and/or using airports or flying difficult? This could include: A physical disability or health condition e.g. affecting your movement, balance, vision or hearing; or a non-physical disability or health condition e.g. affecting thinking, remembering, learning, communications, mental health or social relationships. Base: all (3,000)

The proportion of the population that self-defined as PRM is higher in this survey than previous CAA research. This is likely to relate to the definition in the current questionnaire having been intentionally designed to be as inclusive as possible. This decision was taken based on findings from qualitative research which revealed that while the CAA's definition is 'a person who requires some support or adaptation in order to use an airport or travel on an airplane', people generally considered themselves to have health-related access restrictions only if they had a significant physical disability and therefore the true size of this population was probably being underestimated.

> *"You don't want to be a nuisance. I suppose you think how disabled do you need to be to need assistance?"* (PRM, London)

Another reason for a greater incidence of PRM in this survey is that the question was asked of the whole population and not just recent flyers. Of those who reported having a health-related access issue, just under two in five (39%) flew within the last 12 months, half (50%) flew less recently than this and one in ten (10%) have never flown. This compares with 49% of the total population who have flown in the past 12 months, 42% who have flown less recently and 8% who had never flown.

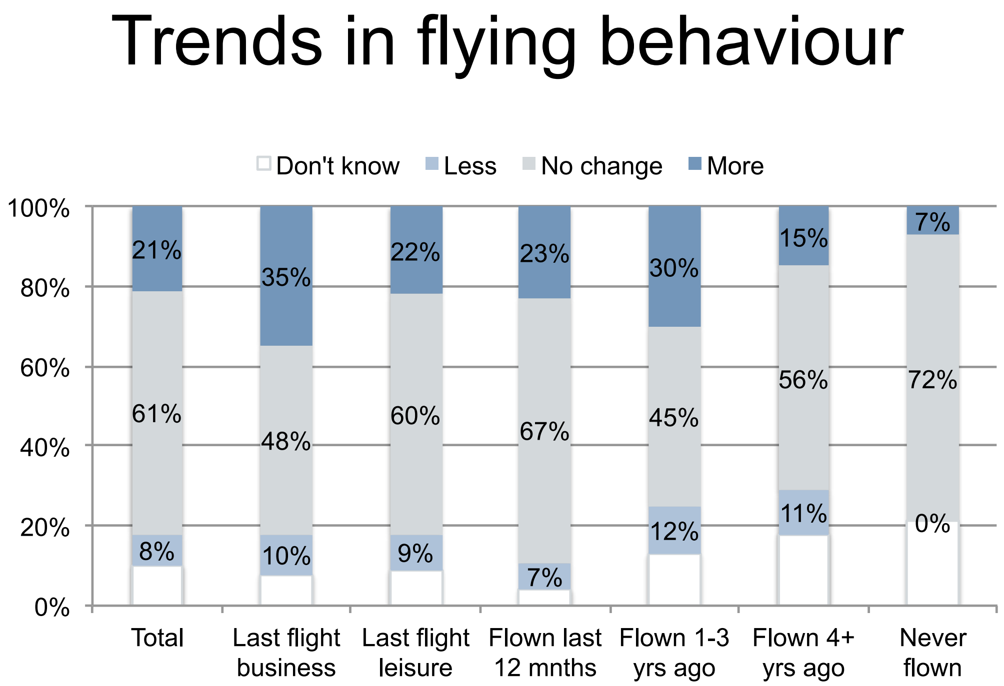
Figure 7



3.5 Expected trends in flying behaviour

All consumers, again whether or not they flew within the last 12 months, were asked how they expect their flying behaviour over the next year to compare to now. The majority (61%) believe that it will be unchanged and, of the remainder, more anticipate that they will fly more than less (21% more vs. 8% less).

Figure 8



Q12 In the next 12 months, do you expect that you will fly more, the same amount or less compared to now? Base: all (3,000)

Groups more likely than average to expect an increase in their flying include those aged 16-24, BME groups, business flyers, those with children at home, and those in ABC1 socio-economic groups. Conversely, those aged 65+, PRM with physical conditions, and those in C2DE socio-economic groups are more likely to expect a decrease in their flying behaviour.

4. Understanding non-recent flyers

4.1 Key findings

- Concerns or problems related to air travel appear to be a much less significant barrier to flying compared to circumstantial factors and personal preferences. Budget constraints were the main reported reason overall for not flying in the last 12 months (mentioned by 47%).
- Concerns about air travel were only mentioned by 8% as a reason for not flying. Some people for whom this was a barrier mentioned safety concerns specifically, but others referred to 'not enjoying flying' for other reasons or generally.
- Other specifically aviation-related barriers were mentioned by even fewer – these included access difficulties (6%), environmental concerns (4%), and previous poor experiences (2%).
- Access was, not surprisingly, more likely to be one of the barriers to flying mentioned by those who previously defined themselves as having health-related access restriction. In addition, when PRM respondents were subsequently asked specifically whether access issues were a reason for not flying with the last 12 months, 42% of PRM with a physical disability and 35% of PRM with a non-physical condition stated that they were.
- In the qualitative research, the issue of airport accessibility for those with non-physical conditions was discussed in depth. People whose access issues are related to mental health conditions and cognitive disabilities required help and support to access air travel not necessarily because of their physical mobility needs but because they can encounter numerous issues when travelling by air. These include anxiety, strong personal preferences, difficulty interacting with people, difficulty processing and retaining information, difficulty navigating spaces etc.
- 17% of non-recent flyers travelled abroad using another transport mode over the last 12 months. The remainder presumably either travelled domestically or did not make a trip by air within that period.

4.2 Barriers to flying

The initial qualitative research suggested that the reasons why some people have not flown recently were many, varied and often due to a combination of personal circumstances including health issues, economic circumstances, family changes and no need to travel abroad etc. There were also some who perceived it to be a 'hassle' to travel by air and/or preferred other forms of transport.

The survey sought to quantify the barriers to flying by asking those who have not flown within the last 12 months to nominate which, from a list of possible factors identified through the qualitative research, were reasons for them not flying more recently. The most prevalent reasons were more circumstantial factors and these were far more likely to prevent flying than issues or problems specifically related to air travel.

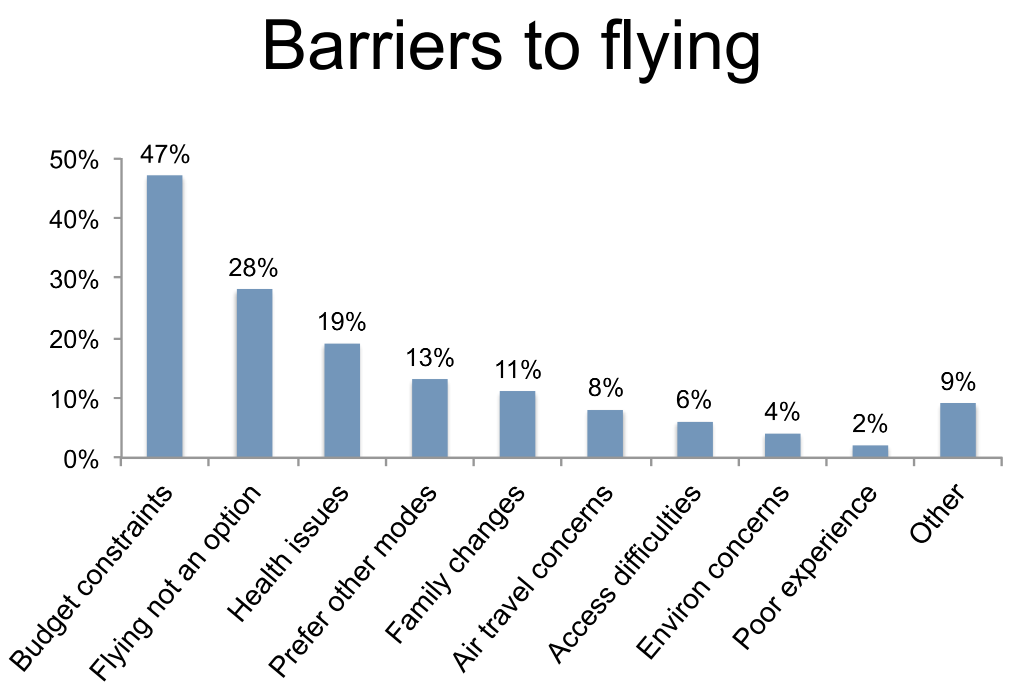
Budget constraints emerged as the main barrier to flying overall (mentioned by 47%). Other circumstantial reasons included flying not being an option for their trips (28%), having health issues (19%) and family changes preventing flying (11%).

Personal preferences were another reason for about one in eight (13%) who favoured another mode of transport.

Having concerns about air travel was mentioned by fewer than one in ten overall (8%), as were having access difficulties (6%), environmental concerns (4%), or a previous poor experience (2%).

Fewer than in one in ten (9%) cited other reasons; these included a preference for local holidays, generally not enjoying the experience of flying, or other circumstantial reasons (e.g. too busy for travel, divorce, bereavement, looking after pets etc.).

Figure 9



Q9 Which of the following were reasons that you have not flown within the last 12 months?
Base: those who have not flown in past 12 months (1,530)

Drilling down further into the 'circumstantial barriers', budget constraints were more of an issue for those aged between 25-44 (57%), as well as those living in Wales (57%). Those who last flew on business were more likely to mention that flying was not an option for their trips over the last 12 months (36%). Health issues were mentioned considerably more frequently by those with health-related access restrictions – particularly those with physical disabilities (53%) but also those with non-physical health conditions (35%) – as well as those aged 65+ (33%). Family changes were, not surprisingly, referred to more often by those with children at home (28%).

Favouring other modes of transport was more of a factor both for those who have previously had cause to complain (determined by a question on complaints[8] - 23%), and those who have never flown (19%); this indicates that this barrier is partly related to previous poor experience of air travel and partly to personal preferences.

In terms of the aviation-related barriers, air travel concerns were more of an issue for those with access restrictions due to non-physical conditions (18%), nervous flyers (in response to a question on attitudes to safety[9] – 16%), and those who have never flown (16%). In addition, an open-ended question to establish reasons for air travel concerns showed that specific fears about airline crashes and terrorism were factors for some,

[8] See Section 6.3 for more detail on complaints
[9] See section 9.2 for more detail on attitudes to safety

however others reported being nervous or not enjoying flying for other reasons than safety or security, or in general without making direct reference to safety or security concerns.

> *"Planes crashing and going missing have put me of flying." (Last flew between 1 and 3 years ago)*
>
> *"With the terrorism threat at an all time high in this country, outbreaks of Ebola continuing to happen.... I wouldn't even travel to central London anymore."* (Last flew between 4 and 10 years ago)
>
> *"I am frightened of heights as well and claustrophobic."* (Last flew more *than 10 years ago)*
>
> *"Phobia. Possibly based on Asperger Syndrome, sensory overload, busy crowds, man made objects not trusted to work."* (Has never flown)

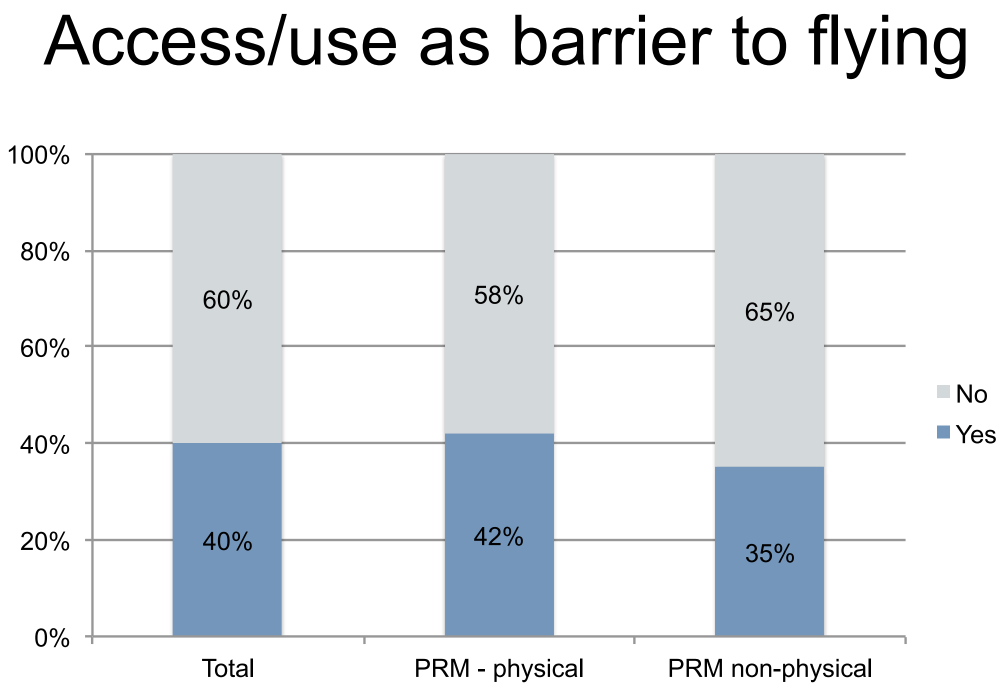
Access difficulties were more prevalent particularly for PRM due to physical disabilities (16%), but also for those with non-physical health conditions (12%). Environmental concerns did not show any significant differences between groups in responses.

Poor experiences were cited more often by those who have previously made a complaint (10%). An open-ended follow up question about the nature of the poor experience received a wide range of responses including references to inflight turbulence or bumpy landings, the passenger being unwell during the flight, dissatisfaction with the waiting and/or journey times, and customer service issues.

4.3 Whether access is a barrier for PRM who are non-recent flyers

PRM who have not flown within the last 12 months were also specifically asked whether difficulties accessing and/or using airports or flying were a reason they have not flown recently. Two in five (40%) of those non-recent PRM flyers said that access was a barrier to flying, and it was more of an issue for those with physical (42%) than non-physical (35%) conditions. This was significantly higher than the proportion of this group which earlier mentioned access as one of the reasons they have not flown (15%). This difference is because the subsequent question prompted them specifically to consider access restrictions as a barrier and, in the qualitative research, it was apparent that there is a reluctance to admit this initially (which also resulted in some people with restrictions reporting that they did not seek assistance).

Figure 10



Q11b Were difficulties accessing and/or using airports or flying a reason you have not flown in the last 12 months? Base: self PRM who have not flown in last 12 months (404)

In the qualitative research, the issue of airport accessibility for those with non-physical conditions was discussed in depth. People whose access issues are related to mental health conditions and cognitive disabilities required help and support to access air travel not necessarily because of their physical needs but because they can encounter numerous issues when travelling by air. These include but are not limited to: feeling anxious in crowds and in situations where they have to wait for a long time; strong preferences about where to sit on board and who they sit next to; interactions with other people that seem inappropriate/rude but are symptomatic of their condition. They may also find it difficult to process and retain information, become disoriented or have other additional conditions that make navigating airports difficult.

The qualitative research also revealed that accessibility was not just about airports. Many of the potential barriers and anxieties to air travel for those with health-related access restrictions pertain to the flight itself as much as the airport experience. Participants with health-related access restrictions reported that their experience on board the plane is just as important as the experience in the airport, and the airline's policies and approach to those with health-related access restrictions has a substantial bearing on their satisfaction with their experience.

4.4 Whether non-recent flyers have travelled abroad using another mode of transport

All non-recent flyers were additionally asked whether they have travelled abroad during the last 12 months using any other mode of transport. About one in six (17%) had done so and this was more prevalent among those residing in London, BME groups, younger groups, those with children at home and nervous flyers.

Figure 11

Travel abroad by other modes

Travelled abroad by other modes	%
Total	17
Significantly **higher** among:	
London residents	36
BME (ethnicity)	32
Aged 16-24	26
Children at home	26
Nervous flyers	25
Base: those not flown in past 12 months (1,530)	

Q10 In the last 12 months, have you travelled abroad for business or leisure purposes using another mode of transport? Base: those who have not flown in last 12 months (1,530)

This finding about some people with children at home favouring other modes of transport was supported by the qualitative research. It found that non-recent flyers with young children had sometimes travelled abroad by other means to avoid luggage restrictions and because the travel experience was easier to manage.

> *"It's the hassle for me, and the luggage restrictions. My wife doesn't pack light. And with a kid as well – it's just easier to get the Eurostar to Disney. Everyone has a nice time and it's so easy."* (Infrequent flyer, London)

5. Air travel decision-making and choice factors

5.1 Key findings

- The qualitative research revealed that choice factors for travel decision-making are varied and complex. It also found that flight-related choices may be a relatively less important and considered part of travel decision-making compared to factors related to the holiday type or destination.
- The survey intentionally focused on air travel decisions specifically and it found that the departure airport was second only to price as a consideration for recent flyers in choosing their flight. Each was mentioned by a majority as being 'very important' (67% for price, 58% for departure airport). The key driver for the selection of a particular airport to depart from is that it is easy to get to.
- Among those prioritising price, getting good value was more important than accessing the cheapest fare. Only a minority of price-conscious consumers say that they did a lot of shopping around (29%) and some did little or none (18%). That said, just over half (52%) of those who prioritise price said that they made some sort of trade-off to secure a lower cost fare.
- The airline or holiday company emerged as the lowest priority overall (a 'very important' consideration to only 29%), behind the flight schedule or route ('very important' to 47%). However, the carrier may be a more important influence than flyers realise as by far the main booking channel used was the airline or holiday company website. Those who consciously prioritised this factor said that familiarity with the carrier, and its reputation for providing low cost fares and/or good customer service, were paramount considerations.
- Three quarters of flyers in the last 12 months used an online channel to book their most recent flight (65% an airline/holiday company website and 11% a price comparison site). Offline booking sources were much less used overall, but they were important to package holiday buyers, those aged 65+ and PRM.
- Most booked either 4-12 months (41%) or 2-3 months (37%) before travel, while one in five booked within one month of departure (19%). The tendency was to book closer to the date of travel for domestic trips and further ahead for long-haul journeys.
- Overall, the majority used a private vehicle to reach their UK departure airport (34% drove and parked, 24% received a lift), followed by a taxi (22%) and public transport (18%). It was most common to decide this at the time of booking (48%) or sometime before departure (45%). Most (65%) claimed to be fully aware of the transport options at the point of booking.

5.2 Qualitative insights about air travel decision-making and choice factors

The qualitative research found that while, for some people, choosing a flight was an important decision, flight choice could also be a 'means to an end' and just one consideration within a wider process of holiday or business trip planning. Therefore, the decision-making process for some was perfunctory and done without too much reflection, while for others it was a more considered process.

In general, flight choice tended to assume greater importance where people had specific needs (e.g. health-related access restrictions, young family) or where the flight was longer or more complex and therefore a more substantial part of the holiday experience. The extent of active choice/decision-making varied considerably due to these factors, but was also dependent on the extent to which market comparisons were being made.

The qualitative research also found that air travel choices could potentially be affected by a wide range of factors not all of which consumers are necessarily in control of and some which they may not even be fully conscious of:

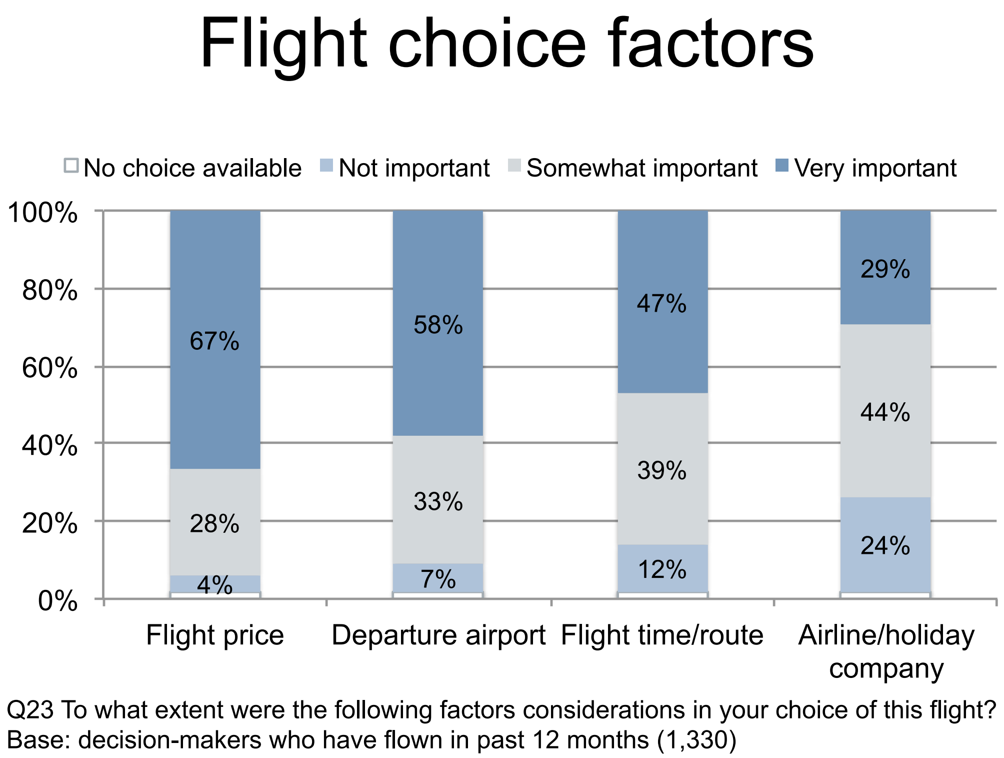
- **Market availability** (e.g. what airlines, prices, routes, schedules and airports it was possible to choose between; as well as how far in advance it was possible to book etc.)
- **Personal preferences and habits** (e.g. in relation to airline or holiday operator brands; and other default choices such as package holidays, aircraft type etc.)
- **Degree of flexibility or personal constraints** (e.g. being flexible on destinations, flight dates, routes and airports vs. having constraints related to any of these e.g. due to purpose of trip; travelling with children; health conditions; limited choice of local airports etc.)
- **Buyer behaviour more generally** (e.g. how spontaneous vs. planned and researched the decision was; who else was involved; what channels and tools were used to compare the market etc.).

5.3 Deciding on the flight

In the quantitative research, the great majority of flyers within the last 12 months (90%) reported that they were either solely or jointly responsible for the choice of their most recent flight. These decision-makers were asked some follow-up questions on their choice factors for this flight.

All flight-related variables included in the survey were at least 'somewhat important' to the great majority. However, price was the highest priority overall as demonstrated by two-thirds of decision-makers (67%) saying that it was a 'very important' consideration in their choice of flight. This was followed by the departure airport, which was 'very important' to almost three in five (58%), and the flight time or route which was 'very important' to almost half (47%). The relatively least important factor appears to be the airline or holiday company which was 'very important to just under three in ten (29%). However, it may be that consumers underestimate the importance of suppliers in decisions as later findings show that the suppliers' websites were the main booking channel (Section 5.4) and information provided by suppliers was the second most important source behind personal experience (Section 8).

Figure 12



There were also some differences in considerations between different population groups: BME consumers rated all of the factors except the departure airport as more important than average. In addition:

- Price was a particularly important factor for women, those who purchased the flight separately to accommodation, younger people (16-24 and 25-44), and those living in the North of England.
- The departure airport was also identified as a particular priority by residents of the North. It was also mentioned more often by PRM – especially if they requested assistance – as well as by those without the internet at home (who may be defaulting to known options as a result), and those who had a flight

disruption when departing on their most recent flight (possibly affected by some post-rationalisation due to the experience of this disruption).

- The flight time or route was a particular consideration for business flyers, PRM, frequent flyers (who made 3+ trips in the last year), domestic flyers and those who have previously made a complaint.
- The airline or holiday company was prioritised by those who requested access assistance, those without the internet at home (again because they may be defaulting to known options), and residents of Wales. It was also more important to business flyers, London residents and nervous flyers (who may also be more comfortable with known brands).

5.3.1 Price considerations in more detail

Those for whom price was at least a ‘somewhat important’ consideration in the quantitative survey were asked whether they were looking for the ‘cheapest possible price for this flight’ or a ‘price that represented good value even if it wasn’t the cheapest’. Overall, the majority of price-sensitive consumers were looking for the latter (62% good value vs. 38% cheapest).

Those prioritising price were also asked about the extent to which they shopped around and compared prices for their most recent flight. Fewer than three in ten (29%) said that they did ‘a lot of shopping around’, while just over half (53%) claimed that they did ‘some’ and almost one in five (18%) admitted to doing ‘little or no shopping around’. Therefore, regarding price as an important choice factor does not necessarily translate into extensive price-comparison behaviour.

Figure 13

Price comparison behaviour

Q26a Which of the following most closely describes the kind of price you were looking for when you chose this flight?			
The cheapest possible price	38%		
A price that represented good value even if it wasn't the cheapest	62%		
Q26b To what extent did you, or someone on your behalf, shop around and compare prices between providers before choosing this flight?			
	Total %	Looking for cheapest price %	Looking for good value price %
A lot of shopping around	29	39	23
Some shopping around	53	48	57
Little or no shopping around	18	13	21
Base: those for whom price was important (1,260)			

In addition, those for whom price was an important consideration were asked whether they did any of the following specifically to secure a cheaper price – choosing a different airline from the one they prefer, choosing a less convenient flight time or route, flying from an airport that is less easy to get to, or only carrying hand luggage. Almost half (48%) did none of these things even though they regarded price as an important consideration. Of those who did, only carrying hand luggage (21%) or flying a less convenient time/route (20%) were the most common trade-offs, while fewer opted for a less preferred airline (15%), or less convenient airport (14%). Preparedness to make one of these trade-offs was, perhaps not surprisingly, more common amongst those consumers who were looking for the cheapest price (69%) compared to those who wanted good value (42%).

Figure 14

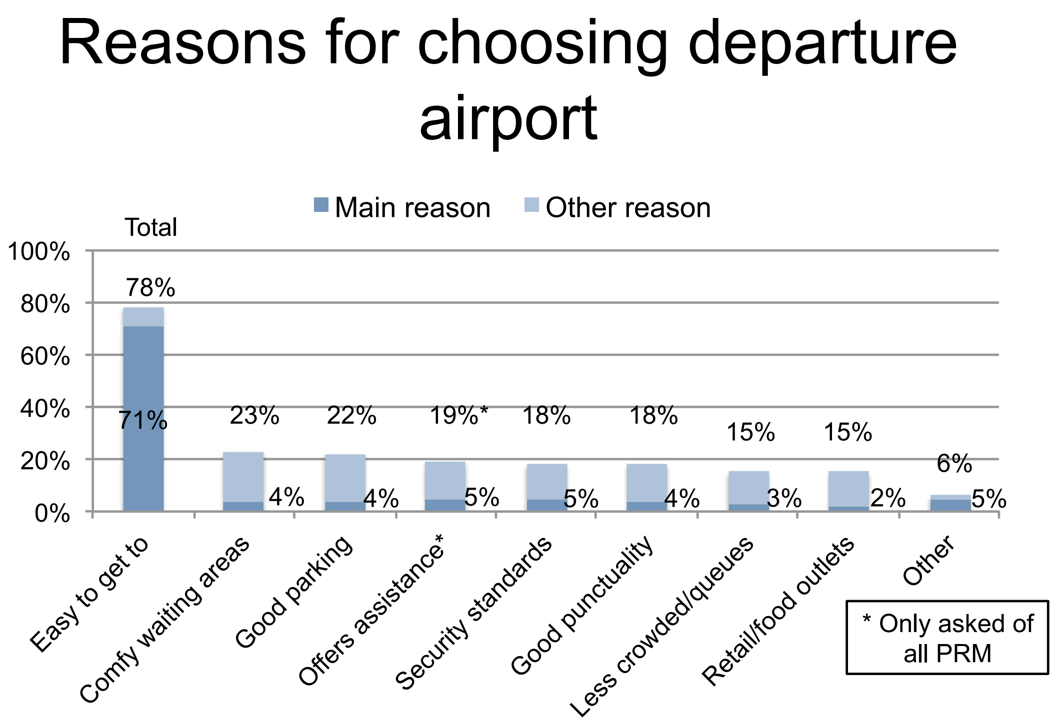
Q26c Did you do any of the following specifically to secure a lower price? Base: decision-makers for whom price was important (cheapest price: 478; good value price: 782)

5.3.2 Departure airport considerations in more detail

Those for whom the departure airport was an important consideration were asked which, from a series of possible factors, were reasons for their choice of departure airport on their most recent flight. They were also asked to nominate which was the main reason overall.

The clear finding from this question was that the airport being ‘easy to get to’ was overwhelmingly the main priority (71% rated it their main consideration, 78% one of their considerations). All other factors measured were secondary to this – these included comfortable waiting areas, good parking, offering assistance (which was only asked of PRM), high standards of security, a good punctuality record, less crowding or queues than other airports, and a variety of retail outlets.

Figure 15



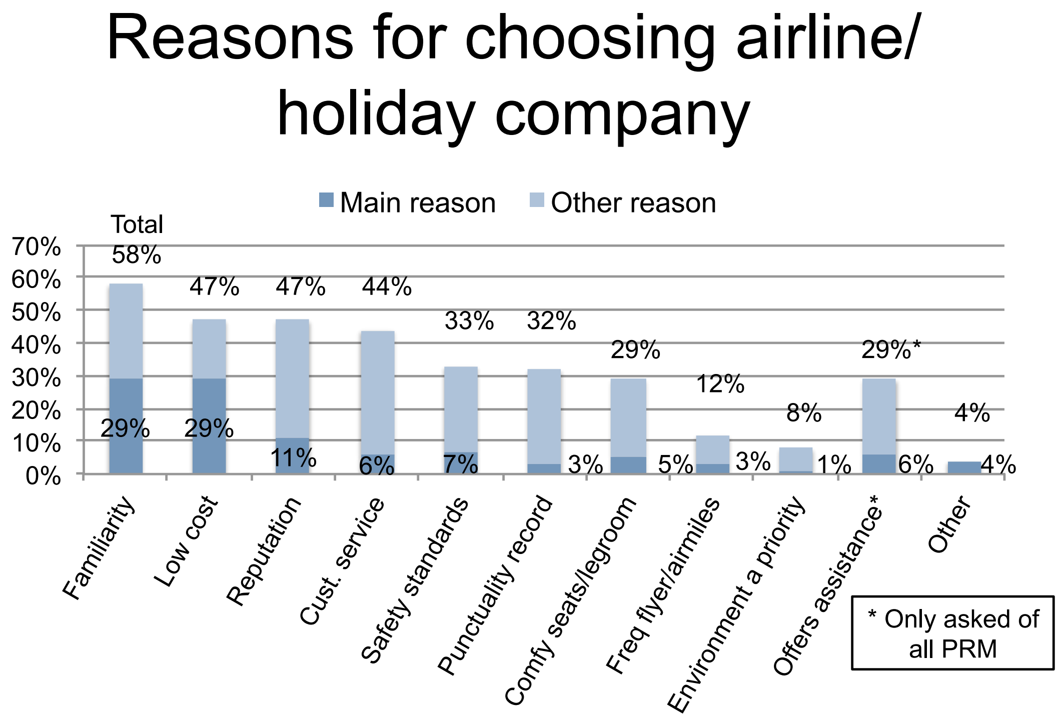
Q25a/b Why did you choose to fly from this airport? And which was the main reason?
Base: decision-makers for whom departure airport was important (1,217)

5.3.3 Airline or holiday company considerations in more detail

Similarly, those for whom the airline or holiday company was an important consideration were asked which, from a series of possible factors, were reasons for their choice of airline or holiday company on their most recent flight. They were also asked to nominate which was the main reason overall.

Familiarity emerged as the most important reason for choosing a particular airline or holiday company, followed by the offer of low cost flights or packages. Each was selected as the most key reason for their choice by three in ten (29%). However, more people nominated familiarity than cost as being at least one of their considerations (58% compared to 47%). All other factors were secondary rather than primary reasons for choice. The most significant of these (mentioned in total by more than two in five) were the reputation of the airline or holiday company, and it offering good customer service. This was followed by safety standards, punctuality record, comfortable seats and legroom and, for the PRM who were asked this, offering assistance. The least significant factors overall were offering frequent flyer points and being concerned about the environment.

Figure 16



Q24a/b Why did you choose to fly with this airline or holiday company? And which was the main reason? Base: decision-makers for whom airline/holiday company was important (974)

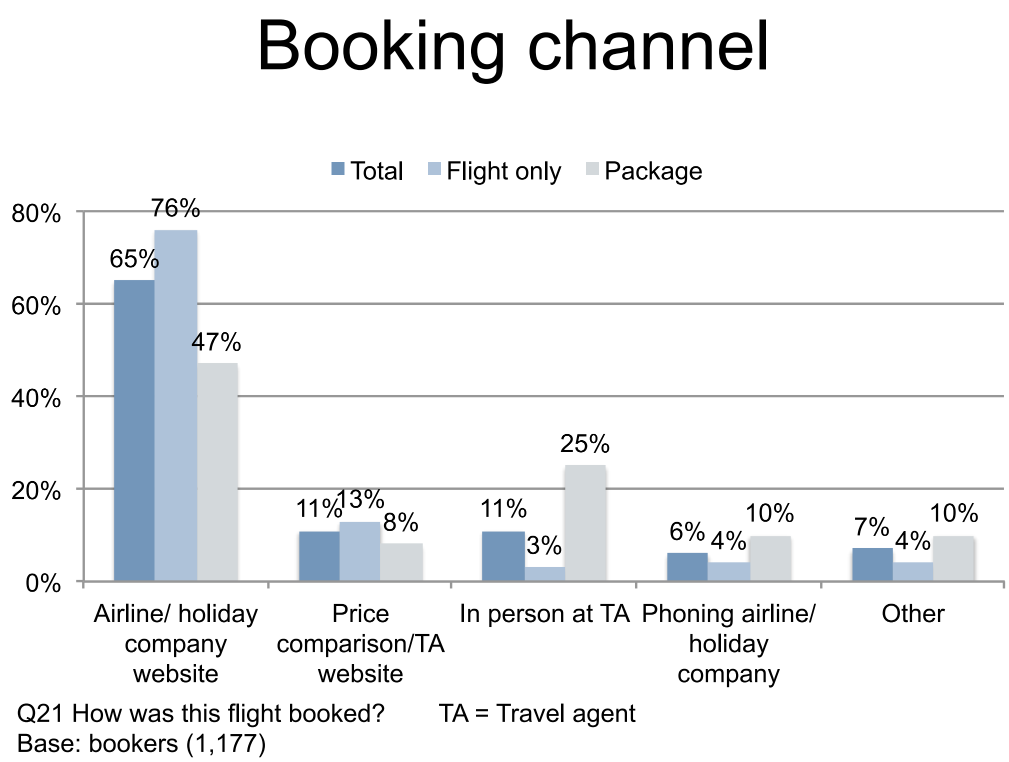
5.4 Booking the flight

Four in five flyers in the last 12 months (80%) were responsible for booking their most recent flight. Bookers were similarly asked some additional questions on the booking process.

5.4.1 Booking channel

Firstly, bookers were asked what channel they used to book their most recent flight. Most (65%) booked via an airline or holiday company website. Other channels were each used by a minority of the sample only; these included a price comparison or travel agency website (11%), in person at a travel agent (11%), and by phone (6%). Those booking a flight only were particularly likely to use an airline or holiday company website to do so, while those booking a package were relatively more likely than flight only bookers to opt for going into a travel agency shop or phoning an airline.

Figure 17



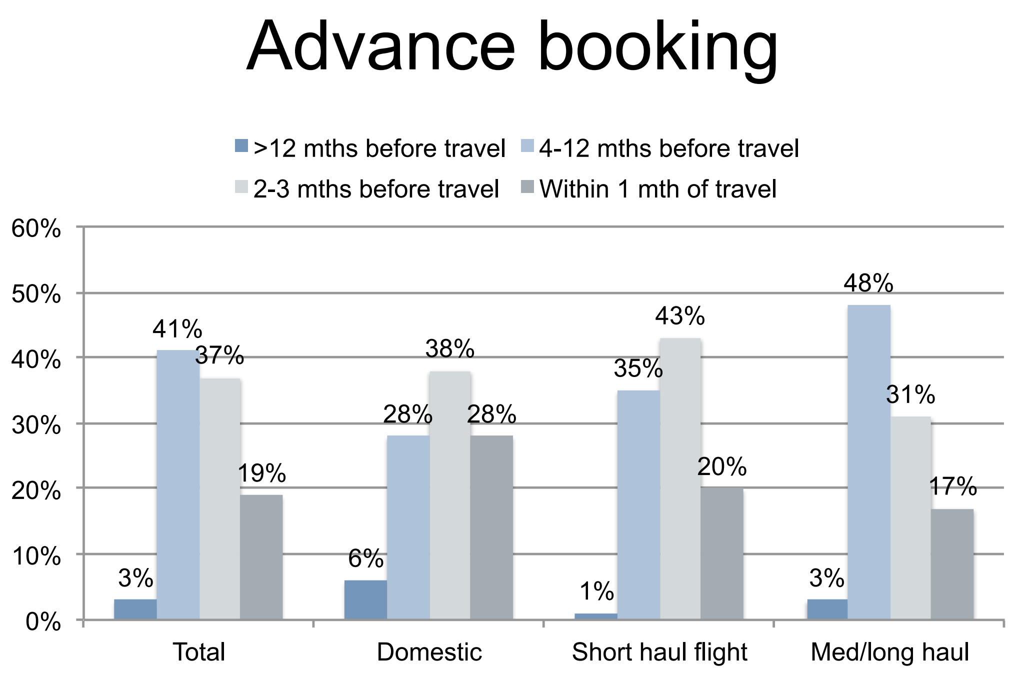
There were also some demographic differences in booking channels, including that 'in person' was particularly important for older people (26% of those aged 65+ booked this way). Older people and PRM are also more likely to have booked by phone (12% of those aged 65+ and 11% of PRM).

5.4.2 How far in advance booked

Bookers were additionally asked how far in advance they booked. The most common responses overall were between 4-12 months before booking (41%) or between 2-3 months before travel (37%). In addition, around one in five booked within one month of travel (19%), while only a tiny minority booked more than 12 months before travel (3%).

Those flying domestically were more likely than average to book within a month of travelling (28%), those flying short haul to book 2-3 months before their departure date (43%) and those travelling medium or long haul to book 4-12 months ahead (48%).

Figure 18



Q22 How far in advance of the date of travel was the booking made for this flight?
Base: bookers (1,177)

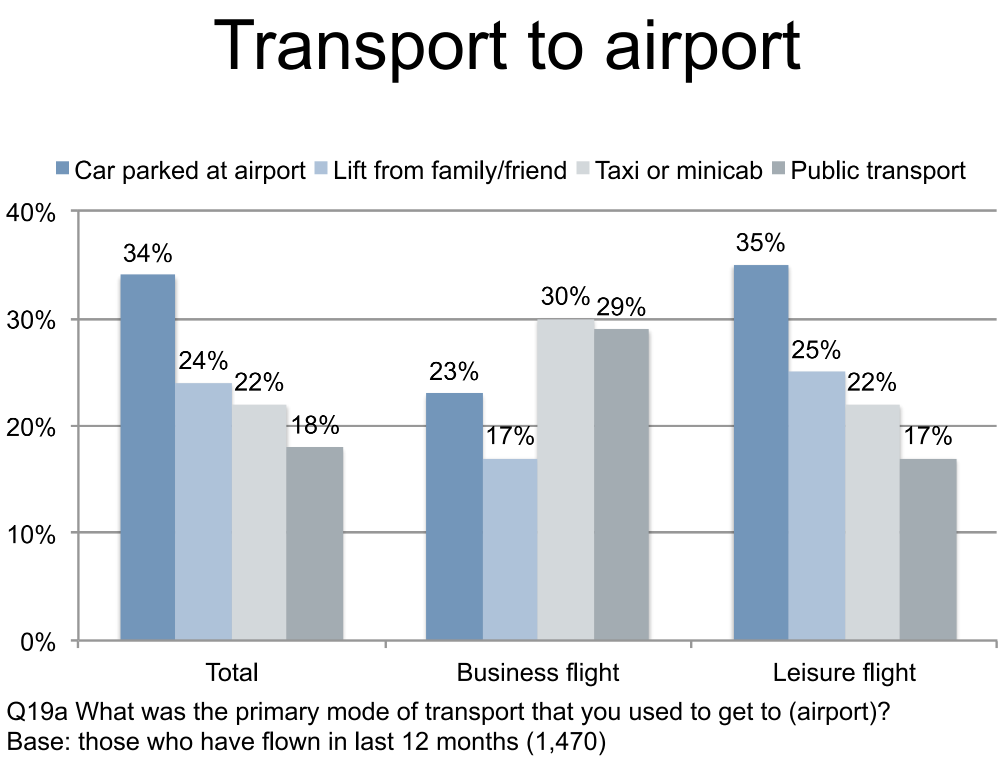
5.5 Getting to the airport

All recent flyers were asked a series of questions on their transport to the UK departure airport on their most recent flight.

5.5.1 Mode of transport

Firstly, they were asked what mode of transport they used to get to their departure airport. Overall, the most prevalent transport mode was driving a car, which was parked, at or near the airport (34%). This was followed by receiving a lift from a family member or friend (24%), taking a taxi or mini-cab (22%), or using public transport (18%). Use of a private vehicle (either self-driven or as a lift) was more common for leisure than business flyers, while business flyers relatively more likely to have opted for a taxi or public transport.

Figure 19



There were also some differences in modes of transport by PRM, departure airport and demographics:

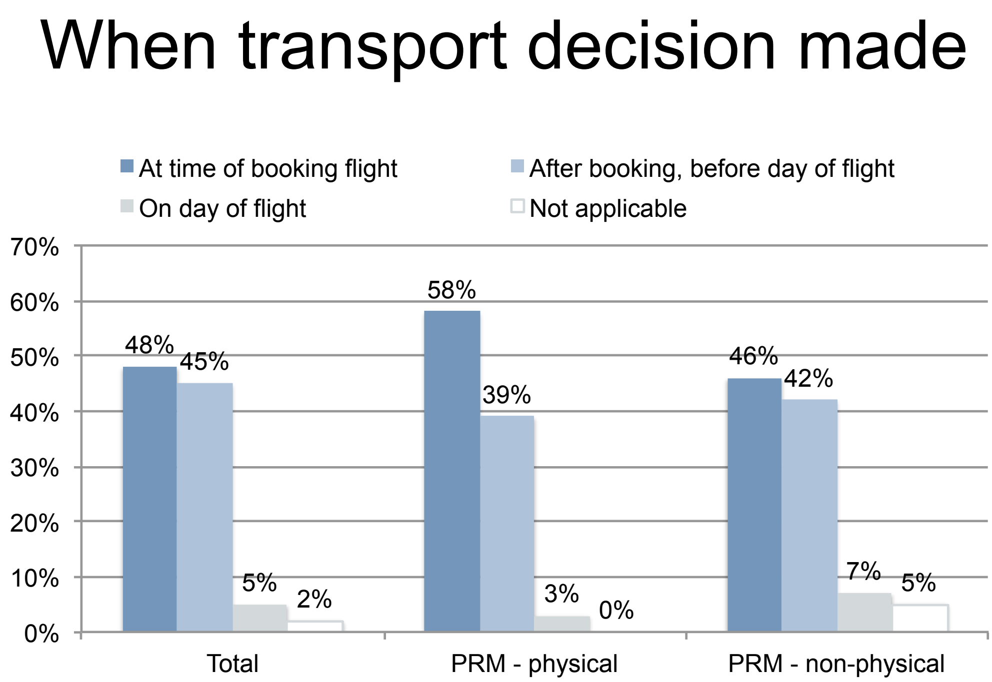
- PRM: Those with physical disability or condition were more likely to opt for a lift or a taxi. Those travelling with a companion with access restrictions, on the other hand, were more likely to drive. Flyers with short-term health conditions were more likely than average either to take a taxi or to drive themselves. Public transport was less likely to be used by most PRM, with the exception of those with non-physical conditions.
- By airport (where samples are 50+): Public transport use was higher for those departing from London airports, particularly Heathrow and Stansted. By contrast, use of private vehicles (self driven or lifts) was higher in Bristol and Newcastle.
- Demographics: Those aged 16-24 are relatively more likely to have received a lift, those aged 25-44 to have used public transport, those aged 44-64 to have driven, and those aged 65+ to have taken a taxi.

5.5.2 When transport decision was made

Recent flyers were also asked when they made their decision to use this particular mode of transport.

Most made the decision on transport either at the time of booking (48%), or sometime after the booking but before departure (45%). Very few waited until the day of the flight (5%). The main sub-group difference identified, as shown in Figure 20, is that those with access restrictions due to physical conditions were significantly more likely to decide on their mode of transport at the time of booking (58%). Other sub-group differences include that domestic flyers were more likely than average to decide on their transport at point of booking (56%), medium to long-haul flyers tend to determine this sometime after booking but before day of travel (50%), and business flyers to have left this decision until the day of flight (13%).

Figure 20



Q19b When was the decision made to (use that mode of transport)?
Base: those who have flown in last 12 months (1,470)

The timing of the decision to use a particular mode of transport also differs depending on the mode of transport used. People using public transport or car parks were more likely than average to have made their decision at the time of booking their flight (61%) as were those taking public transport (55%), while those who took a taxi or received a lift were less likely to decide at the point of booking (29% and 40% respectively).

5.5.3 Awareness of transport options at the time of booking

Recent flyers were additionally asked whether or not they were aware of the transport options and their attributes at the time their flight was booked.

Almost two-thirds (65%) said that they were fully aware of the transport options and their related attributes at the time of booking, and another three in ten (31%) said that they had some idea. Only a very small proportion (4%) admitted that they were not aware.

The extent of awareness increases with age but does not vary by socio-economic group as shown below. It also is not impacted by having a health-related access restriction overall, but within this group those with physical conditions, and those who requested assistance, are more likely to have been fully aware of transport options at the time of booking (70% each). In addition, frequent flyers are, not surprisingly, more likely to have been fully aware (73%).

Figure 21

Awareness of transport options

	Total %	16-24 %	25-44 %	45-64 %	65+ %	ABC1 %	C2DE %	PRM self %
Fully aware	65	54	62	68	77	65	65	66
Had some idea	31	40	34	29	19	32	30	29
Not aware	4	6	4	3	4	3	5	5

Q19c At the time of booking your flight, how aware or otherwise were you of the different attributes (e.g. costs, journey time, availability) of the transport options to get to (airport)?
Base: those who have flown in last 12 months (1,470)

6. Satisfaction with the air travel experience

6.1 Key findings

- There was a high level of reported satisfaction among flyers in the last 12 months with their most recent flight. The average satisfaction score was more than 4 out of a maximum of 5, and 37% gave the top score.
- However, the qualitative research suggests that while satisfaction may be high, expectations are generally low and therefore high satisfaction may not mean that the flight experience was of particularly high quality. The association of air travel with the excitement of travel and, in most cases, commencement of holidays may have a halo affect that is positively influencing satisfaction with the flying experience itself.
- Overall 10% incurred a disruption on their most recent flight within the last 12 months – for 9% it was a delay and 1% a flight cancellation. The majority were satisfied with the handling of the issue – the average satisfaction score was 3.5 out of 5 for the information provided and slightly lower at 3.3 out of for the assistance offered.
- 14% of those who have flown at any time previously have ever complained about an aspect of their journey. This was mainly because of delays or customer service issues and the main channel for complaints was the airline (70% complained here). It was most common to complain to the airline (70% of complainants), with other bodies having only been approached by minorities of those who complained.
- Satisfaction with complaints handling was lower than for the management of disruptions – the average rating was less than 3 out of 5 and fewer were 'very satisfied' (17%) than 'very dissatisfied' (29%).

6.2 Qualitative insights into satisfaction with the air travel experience

The qualitative research found air travel to be inextricably associated with the excitement of travel and, in most cases, the commencement of a holiday. However, most had low expectations of air travel, seeing it as a means to an end. Commonly used words to describe the experience were 'stressful' and 'exhausting'. Highlights of the air travel experience were generally characterised by 'smooth' processes (i.e. absence of problems) and 'added value' to their experience, including good shopping/refreshment facilities at the airport and friendly, helpful staff. Conversely, incurring a significant problem (e.g. flight delay or cancellation, lost luggage etc.) would not surprisingly contribute heavily to a poor experience.

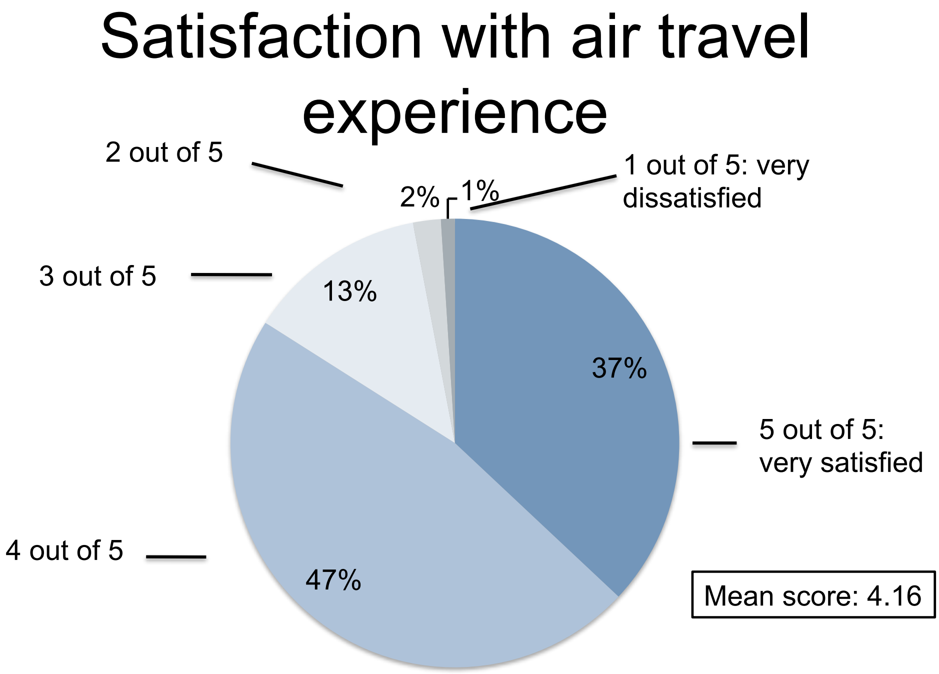
> *"For me it just flew by. We walked in, there was no queues… straight in. That was Easyjet and it's the first time I've ever done it. A couple of minutes, everything gone, I was away. Very easy."* (Leisure flyer, 45+, C2D, Bristol)

> *"When we came back into Manchester we waited an hour and a half to get through passport control. That was quite hard."* (Leisure flyer, 20-44, C2D, Manchester)

6.3 Overall satisfaction

In the survey, those who have flown in the last 12 months were asked how satisfied or dissatisfied they were with their most recent flight. There was a high level of reported satisfaction overall - almost two in five (37%) said that they were 'very satisfied' and almost half (47%) gave a rating of four out of five in terms of their satisfaction. Conversely, only a tiny minority (3%) rated their level of satisfaction a one or two out of five. This translates into an average satisfaction score of more than four out of five.

Figure 22



Q27a Thinking about this most recent flight, please indicate how satisfied or dissatisfied you were with your overall travel experience on this journey?
Base: those who have flown in last 12 months (1,470)

Older people (45-64 and 65+), and those who had purchased a package holiday, were particularly likely to be 'very satisfied'. Not surprisingly, those who incurred a disruption on their most recent flight were least likely to be 'very satisfied', but one-quarter (25%) of this group nonetheless gave the highest possible satisfaction rating.

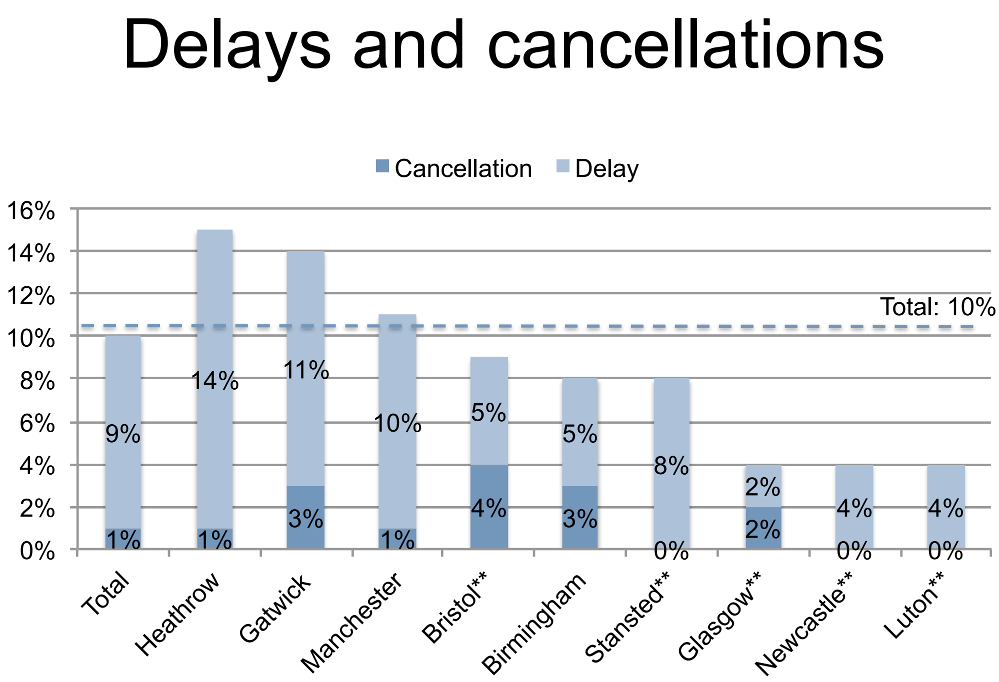
The small number who had given low satisfaction ratings were then asked for their reasons, in an open-ended question. The responses were mainly about problems during the journey, such as flight delays, cancellations and missing luggage. There were also mentions of cramped seating and poor service contributing to dissatisfaction.

6.4 Experience of previous flight disruption

6.4.1 Incidence of disruption on last flight

Flyers in the last 12 months were also asked whether they had experienced either a significant flight delay or cancellation on their most recent outbound flight from the UK. Overall, one in ten (10%) incurred a disruption of some kind and this was mostly delays (9%) rather than flight cancellations (1%). The experience of a disruption was higher than average amongst those departing from London Heathrow and Gatwick, but significantly lower than average among those who used Glasgow, Newcastle or Luton airports.

Figure 23



Q28a During this most recent journey, did you experience a significant delay (i.e.1 hour or more) or flight cancellation on your outbound flight from the UK?
Base: all flown in last 12 months (1,470); Only airports with 50+ flyers listed. **: base <100

6.4.2 Satisfaction with disruption handing

Those who had incurred a flight disruption were asked about their satisfaction with its handling. They were more likely to be satisfied than dissatisfied with both the information they were provided and the assistance they received in relation to the disruption, as highlighted in Figure 24 below.

Figure 24

Satisfaction with handling of disruption

Q28b How satisfied or dissatisfied were you with the following aspects of how this was handled?		
	Information and updates provided to passengers %	Arrangements made to assist passengers such as food, accommodation etc %*
5 Very satisfied	25	22
4	30	31
3	25	20
2	10	12
1 Very dissatisfied	10	15
Mean score	3.52	3.31
Base: all those experiencing a delay or cancellation (155)		
* Excludes 31 respondents who said 'not applicable'		

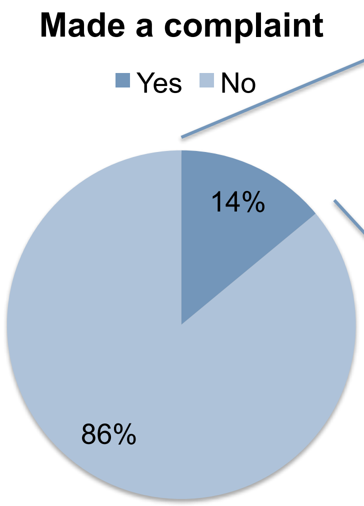
6.5 Experience of complaints

6.5.1 Extent of complaining

All who have at some time flown were also asked whether they have ever made a complaint related to a flight. A total of one in seven (14%) of flyers have done so; this was most often about a flight delay (36% of those who complained), with other relatively prevalent reasons including customer service or staff issues (28% of those who complained) and lost luggage (26%).

Figure 25

Extent of complaints



Reasons for complaint (Q35b)	%
Flight delay	36
Customer service/staff	28
Lost luggage	26
Flight cancellation	16
Missed flight/connection	14
Lack of access/assistance at airport	7
Denied boarding	5
Base: those making a complaint (374) All reasons above 5% listed	

Q35a Have you ever made a complaint in relation to any aspect of air travel?
Base: all who have flown at some point (2,749)

Those who require access assistance are more likely to have made a complaint in the past (28%), however findings in the next section show that the majority of those who requested assistance were very satisfied with their experience. Other groups more likely to have complained include London residents (22%), frequent flyers (21%) and those who bought a flight only (20%).

6.5.2 Treatment of complaints

Those who had complained were asked whom they complained to and how satisfied they were with the handling of this complaint.

It was most common to complain to the airline (70% of complainants), with other bodies having only been approached by minorities of those who complained. Satisfaction with complaint handling was polarised, with more indicating that they were ‘very dissatisfied’ (29%) than ‘very satisfied’ (17%).

Figure 26

Treatment of complaints

Q35c Who did you complain to?	
	%
Airline	70
Holiday company	21
Airport	19
Travel insurance company	11
CAA	6
Other	4
Base: those who complained (374)	

Q35d How satisfied or otherwise were you with how this complaint was handled?	
	%
5 very satisfied	17
4	21
3	22
2	11
1 very dissatisfied	29
Mean score:	2.86
Base: those who complained (374)	

7. Travel experience and expectations of PRM

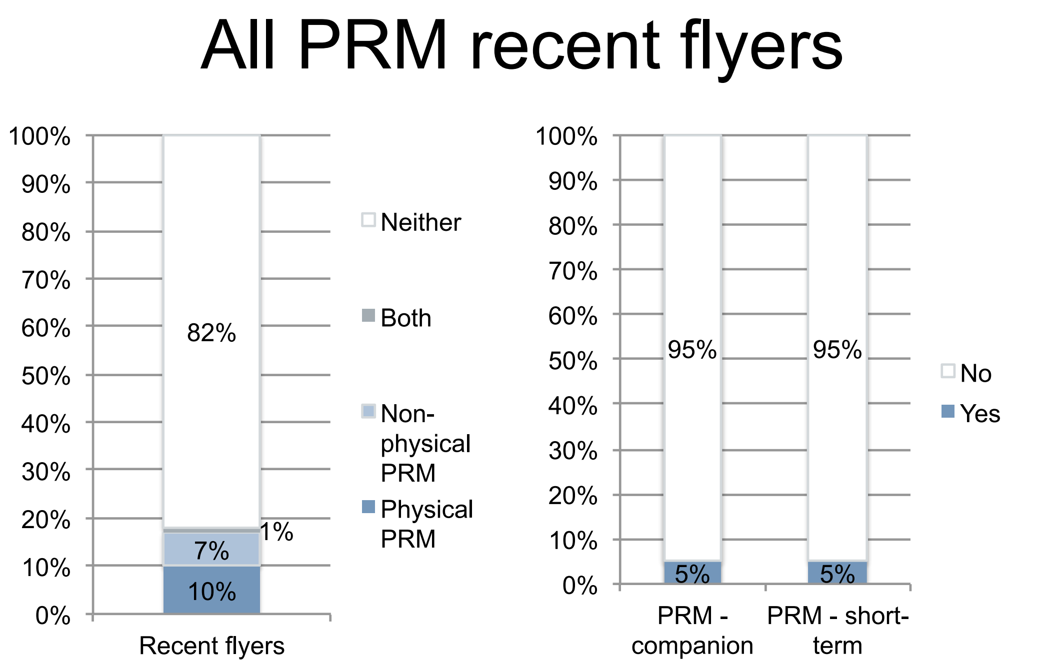
7.1 Key findings

- This section provides more detail on access restrictions, including providing:
    - An incidence of all recent flyers whose access was restricted by a disability or health condition either themselves or in their travelling party.
    - An analysis of the experiences and expectations of receiving access assistance during a flight.
- 18% of recent flyers identified themselves as having a health-related access restriction– 10% have physical conditions, 7% have non-physical ones and 1% has both. In addition, 5% of flyers in the last 12 months travelled with someone with an access restriction on their most recent flight, and 5% themselves had a short-term health issue. The net total of all of these groups combined is 25% of all recent flyers that were affected by some sort of health condition that impacted their air travel over the last 12 months.
- Of this group as a whole, 38% requested assistance and this was mainly at the point of booking. Most likely to have accessed assistance were those whose companion had an access restriction (49%), those with long-term physical conditions (47%) and short-term health issues (45%). Conversely, those with long-term non-physical conditions were much less likely to have received assistance (17%). This is corroborated by the qualitative research, which found that several PRM did not request assistance, especially those with non-physical conditions.
- Those who used assistance during their most recent journey over the last 12 months tended to be very satisfied with the experience. All aspects measured received an average satisfaction score of more than 4 out of 5, with the highest ratings overall received for UK airports.
- In addition, those impacted by access restrictions, even if they have not flown recently, were asked about their expectations of how their assistance needs would be dealt with if and when they next fly. There was a very high level of agreement, and very little disagreement, that these needs will be handled appropriately. However, those whose air travel experience is more historic or have never flown were less able to answer indicating that these groups may require particular targeting so they are aware of the options available to them.

7.2 All PRM recent flyers

Fewer than one in five recent flyers in this survey identified as being PRM (18% - 10% physical, 7% non-physical, 1% both). In addition, one in twenty recent flyers (5%) said that they travelled with some who had such a restriction and one in twenty (5%) that they had a short-term health condition restricting their access when they last flew.

Figure 27

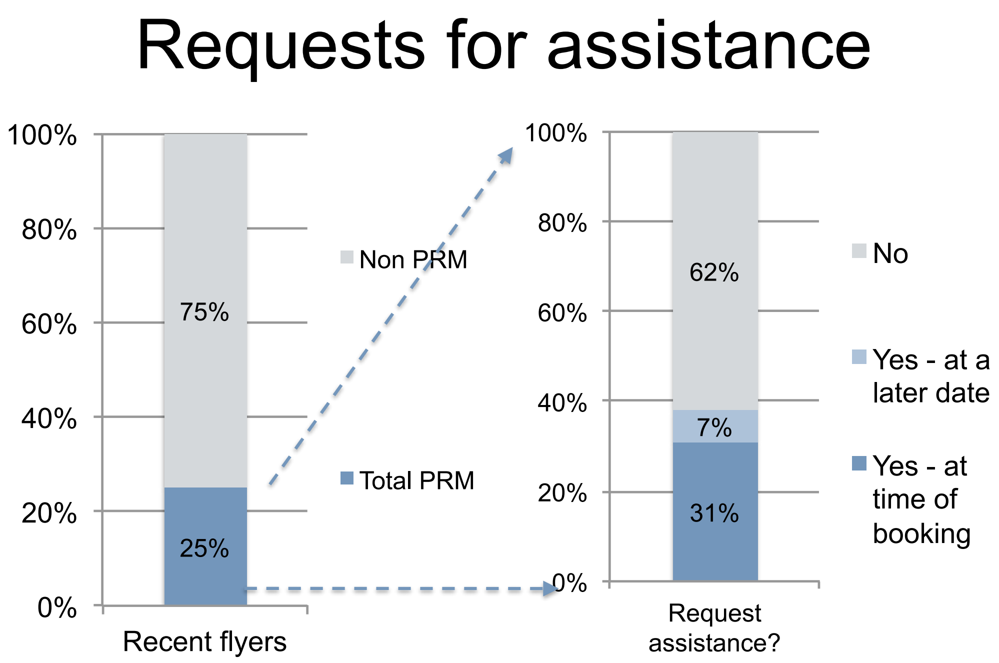


Q6a/Q11a: Recent flyers who are PRM
Base: those flown in past 12 months (1470) and all self PRM (662)

Q17a: Travelling with companions with PRM; Q17b: short-term health conditions
Base: non-PRM (self) who have flown in last 12 months (1,212)

The net total of recent flyers with any long-term or short-term health condition affecting themselves of their party when they last flew is one in four (25%). Of this group, fewer than two in five requested assistance (38%), mainly at the time of booking (31%).

Figure 28



Q29a: Did you request assistance during this journey for [your/your travel companion's disability, health condition or injury]? Q29b: Was this requested at time of booking flight?
Base: all PRM/health conditions who have flown in last 12 months (365)

Those with non-physical conditions were less likely than other groups to have requested assistance:

- Physical condition (47%).
- Non-physical condition (17%).
- Companion (49% - note: small base, n=65).
- Short-term health condition (45% - note: small base, n=56).

The qualitative research found that not all of those who qualified as a PRM under CAA definitions had accessed assistance or were even aware of what was available to them. This was particularly the case for those with non-physical conditions such as autism, dementia and bipolar disorder.

> *"They ask do you have a disability, but I don't say yes because I assume that they just mean physical ones. How can I explain my son's needs and that he might be abusive with staff? It would be the same for people with mental health issues."* (PRM, London)

People with non-physical support needs could find it difficult to express what support they would require, however those with anxiety or bipolar disorders talked about the need for a quiet space to collect their thoughts, calm down or take medication. They also mentioned a desire to know that staff are trained to recognise certain conditions and react appropriately and sympathetically (e.g. autism, bipolar disorder etc.).

In addition, some people who have physical mobility restrictions can feel shy about mentioning them and that they do not 'qualify' as disabled if they do not usually use a mobility aid. The qualitative research found that this issue could pose a barrier to air travel, which may help to explain why people with health-related access issues are so much less likely to have flown recently than the general population. Even those who do access support can mention the difficulty of overcoming the initial barrier of admitting that they need help and support.

> *"I think the trouble with being disabled is you don't want to admit it."* (PRM, London)

7.3 Experience of receiving assistance

Those who had received assistance on their last journey were asked how satisfied or dissatisfied they were with various aspects of this. There was very high levels of satisfaction recorded across the board (average rating of more than 4 out of 5 on all aspects measured). This was particularly the case for the assistance provided at the UK airport they departed from (55% 'very satisfied') and returned to (56% 'very satisfied).

Figure 29

Satisfaction with assistance

Q29c How satisfied or dissatisfied were you with the assistance provided at various stages of this journey?							
	1 very dissatisfied %	2 %	3 %	4 %	5 very satisfied %	N/A %	Mean score
Departure from outbound airport	2	3	10	27	55	3	4.33
During the flight on your outbound journey	0	4	12	28	48	7	4.30
Arrival at your travel destination airport	4	3	12	27	53	1	4.25
Departure from your travel destination airport	1	8	12	23	53	2	4.22
During the flight on your return journey	0	3	15	22	53	7	4.34
Arrival back to the UK	1	6	12	22	56	3	4.29
Base: PRM/health conditions who have flown in last 12 months and requested assistance (137)							

The qualitative research also found that those who received assistance were generally very positive about the experience. This was because they felt genuinely helped by the assistance provided. Some said that without this they would simply not be able to travel by air.

> *"The difference [between not accessing support and accessing support] is night and day. Instead of being traumatised by travel it simplifies it."* (PRM, London)

However, it also uncovered variations reported in the nature of assistance provided between different airports, with some airports apparently providing wheelchair assistance at or before check in and other airports requiring people who do not normally use a wheelchair to navigate check in and security procedures before accessing wheelchair or buggy assistance. Similarly, on the point of arrival some airports provided assistance at baggage reclaim while others did not. This can result in gaps in assistance that can be problematic for PRM, especially in retrieving luggage on arrival, negotiating security procedures and accessing onward transport.

> *"At Gatwick it wasn't very good because you had to go and get a lift and then go on to a next floor before you got [to the special assistance desk."* (PRM, London).

The qualitative research also found that there could be a substantial wait for wheelchair assistance to arrive both in the airport and in the plane on arrival. While this was considered to be acceptable where PRM were free to wait wherever they like in the airport prior to flying, it was less so in airports that required passengers to wait in a specific area or when passengers were kept waiting for long periods on the plane having arrived at their destination. One participant hired her own wheelchair specifically to avoid this problem.

Those airlines that provided the most assistance were greatly appreciated e.g. seating passengers on rows of free seats to allow them to raise their legs during the flight. However, other airlines were felt to make no real adjustments, even where passengers expressed discomfort.

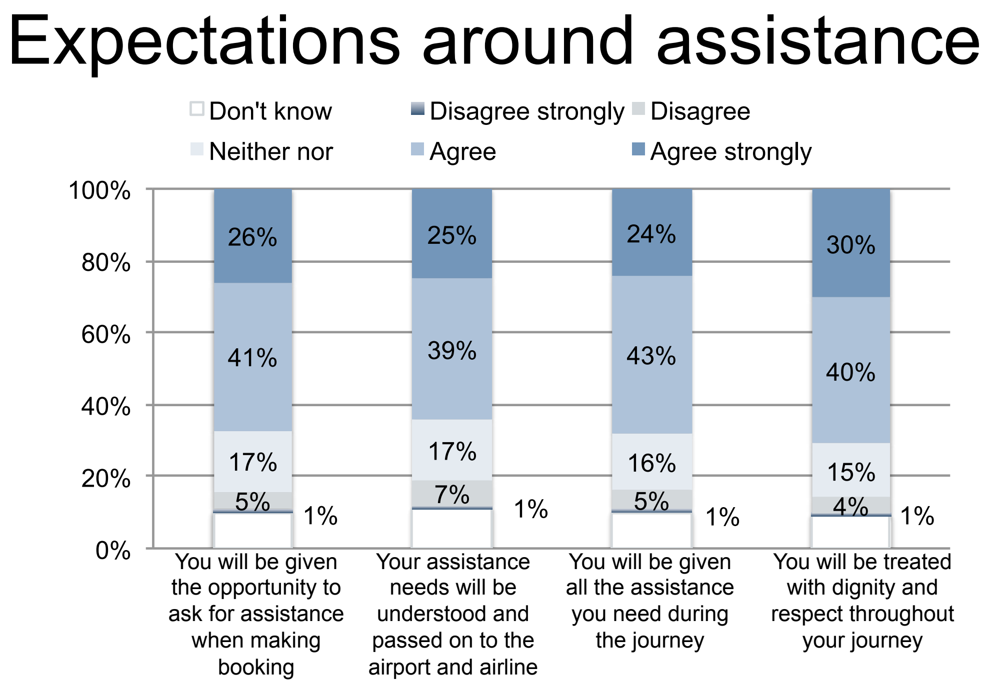
7.4 Expectations of assistance

In addition, in the quantitative research, all who themselves have a health-related access issue, whether or not they have flown recently, together with those who have flown recently with a companion with an access restriction or with a short-term health condition of their own, were asked about their expectations about how their assistance needs would be dealt with if and when they next choose to fly.

Overall, there was a high level of agreement, and very little disagreement, that:

- They will be given the opportunity to ask for assistance when booking (67% agree, 6%, disagree).
- Their assistance needs will be understood and passed onto the airport and airline (64% agree, 8% disagree).
- They will be given all the assistance they need during the journey (67% agree, 6% disagree).
- They will be treated with dignity and respect throughout the journey (70% agree, 5% disagree).

Figure 30



Q30: To what extent do you agree or disagree with the following statements about how your assistance needs will be dealt with if and when you next choose to fly?
Base: all PRM-self, companions and those with short-term health conditions (769)

However, around one in ten do not know enough about the assistance on offer to provide a rating. Not surprisingly, those who last flew 4 or more years ago, and particularly those who have never flown, are more likely to be unsure.

Figures 31 and 32

Expectations by when last flown (1)

	You will be given the opportunity to ask for assistance when making booking		Your assistance needs will be understood and passed on to the airport and airline	
	Agree %	Don't know %	Agree %	Don't know %
Total	66	10	63	11
Flown in past 12 months	79	6	76	7
Last flew 1-3 yrs ago	66	4	65	5
Last flew 4+ yrs ago	53	16	52	16
Never flown **	37 (9% disagree)	28	29 (10% disagree)	28
Requested assistance on last flight	86	2	82	1
Base: all PRM-self, companions and those with short-term health conditions (769) ** Small base size (68)				

Q30: To what extent do you agree or disagree with the following statements about how your assistance needs will be dealt with if and when you next choose to fly?

Expectations by when last flown (2)

	You will be given all the assistance you need during the journey		You will be treated with dignity and respect throughout your journey	
	Agree %	Don't know %	Agree %	Don't know %
Total	66	10	70	9
Flown in past 12 months	79	5	84	4
Last flew 1-3 yrs ago	67	4	67	4
Last flew 4+ yrs ago	56	15	60	15
Never flown **	29 (13% disagree)	31	35 (4% disagree)	28
Requested assistance on last flight	82	1	85	1
Base: all PRM-self, companions and those with short-term health conditions (769) ** Small base size (68)				

Q30: To what extent do you agree or disagree with the following statements about how your assistance needs will be dealt with if and when you next choose to fly?

8. Information needs and consumer issues

8.1 Key findings

- The qualitative research found that most people felt well informed and equipped to make air travel decisions. However, consumers' actual behaviour varied, with most limiting their market comparisons and potentially making sub-optimal choices. In addition, the comparison process was not regarded as transparent or easy to navigate due to 'hidden' costs.
- In the survey, most of those who had previously flown felt well informed with respect to making most air travel decisions and executing tasks. Flyers felt particularly well equipped to compare deals on the market (average informed score of 3.7 out of 5) and to prepare for their trip (3.8 out of 5). Most were also confident with using the internet for shopping around (average confidence score of 3.7 out of 5) and booking flights (3.8 out of 5).
- The one area they were slightly less certain about was their rights as a consumer if something goes wrong (average informed score of 3.3 out of 5).
- In addition, there were certain groups who felt less informed and/or confident:
  - Non-recent flyers – about all aspects (likely to relate to not being able to draw on recent flying experience).
  - 16-24 age group – about their rights and preparing for their trip (likely to relate to having less life and travel experience).
  - 65+ age group – with comparing the market and completing online tasks (likely to relate to lower confidence online).
  - PRM – about preparing for their trip (likely to relate to them having more complicated and specific needs).
  - Access restriction due to physical conditions– with online tasks (potentially relating to the tendency of this group to be older).
- Past flyers were most likely to draw on their own personal experience to make decisions; they also used suppliers' information, online market comparisons and reviews, and informal advice from friends and family.
- Significantly, and in line with the qualitative research, most consumers did not themselves identify gaps in available information or indicate an appetite for more or additional information. Therefore, even though there were apparent areas in which consumers could benefit from additional information (as highlighted above), the majority of consumers do not identify this themselves.

8.2 Qualitative insights on information needs and consumer issues

The qualitative research found that most people felt reasonably well informed and equipped to make air travel decisions. As a result, there was no strong call for additional information or identification of significant information gaps.

However, consumers' actual behaviour varied considerably. Some people reported conducting full and varied searches, including visiting high street and online travel agents, using online comparison sites. However, these were in the minority and most used heuristics in relation to 'value/cheapness' or 'quality/reliability' to limit their searches to save time or due to pre-existing biases or preferences for certain airlines, destinations and operators.

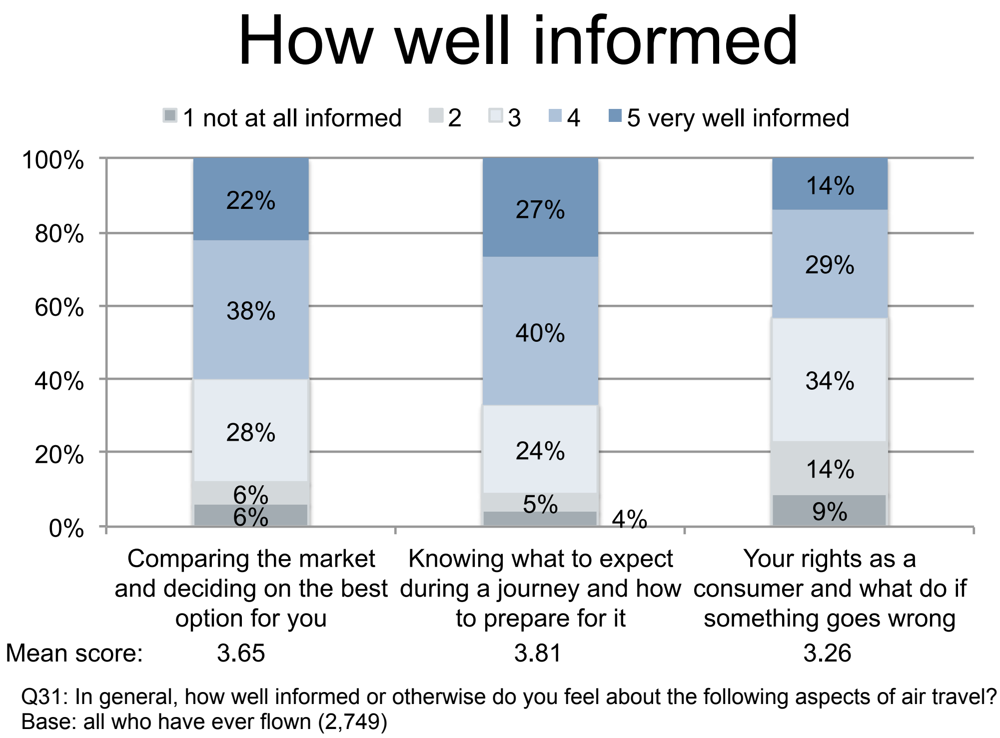
In addition, those who searched the market more fully tended to report a more 'stressful' experience than those who resorted to habitual or edited choices. Where people were exploring a range of options and comparing and contrasting between airlines, the purchase and comparison process was not seen to be transparent or easy to navigate due to 'hidden' costs such as charging for checked luggage, charging for allocated seating and various other premium services. This could result in a lengthy decision-making process and a possible nagging doubt about whether they had actually got the best deal or combination of flights.

> *"I always think it's quite nerve-racking… as you're investigating, everything's dwindling away or the price suddenly changes."* (Leisure flyer, 45+, ABC1, London)

8.3 How well informed do consumers feel about various aspects of air travel

In the survey, all those who have ever flown were asked how informed or otherwise they feel about various aspects of air travel. Similar to the qualitative research, the majority reported feeling well informed about all three aspects measured, with most knowledge overall being about 'what to expect during a journey and how to prepare for it' (average score 3.8/5), followed by 'comparing the market and knowing the best option for you' (average score 3.7/5), and slightly lower again for 'your rights as a consumer and what to do when things go wrong' (average score 3.3/5 with 23% admitting that they are not well informed in this area).

Figure 33



There were some differences in how well informed various population groups felt. In general, frequent flyers (3+ flights in the last year) were more likely to feel informed in all areas. By contrast, non-recent flyers (have not flown in the last year) consistently reported feeling less well informed. Young people (16-24) indicated that they know less with respect to preparing for their journey and their rights if something goes wrong. Conversely, while older people (65+) feel better informed on their consumer rights, they are less so with respect to comparing the market and securing the best deal. Those without the internet at home are also likely to feel disadvantaged in this area. In addition, those who have health-related access restrictions feel less equipped to know how to prepare for their journey. These variations are highlighted in Figure 34 below.

Figure 34

How well informed – differences

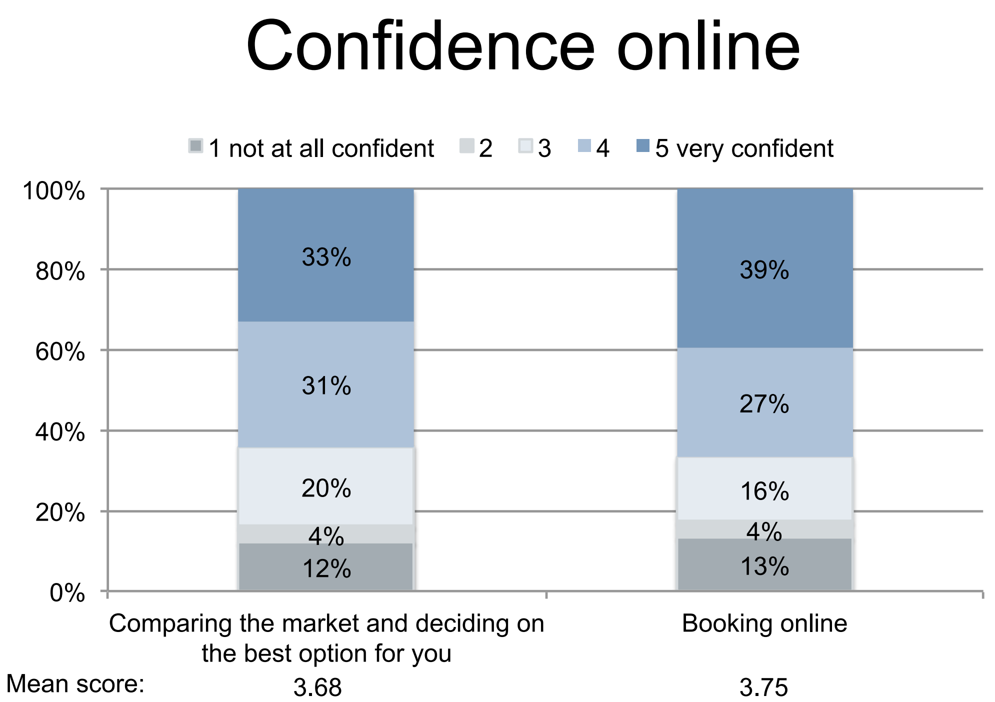
Comparing the market and deciding on the best option for you		Knowing what to expect during a journey and how to prepare for it		Your rights as a consumer and what do if something goes wrong	
Total mean score	3.65	Total mean score	3.81	Total mean score	3.26
Significantly **higher** among:					
Frequent flyers	4.05	Frequent flyers	4.18	Frequent flyers	3.66
Aged 25-44	3.72	Aged 45+	3.88	Aged 65+	3.32
				Men	3.36
Significantly **lower** among:					
Non-recent flyers	3.32	Non-recent flyers	3.54	Non-recent flyers	2.96
No internet at home	3.42	Aged 16-24	3.65	Aged 16-24	3.15
Aged 65+	3.49	Self PRM	3.66	Women	3.16

Q31: In general, how well informed or otherwise do you feel about the following aspects of air travel?
Base: all who have ever flown (2,749)

8.4 Confidence in using the internet for air travel related tasks

All those who have ever flown were also asked about their level of confidence in using the internet both for comparing the market and booking travel. Most felt confident in both cases (average score of 3.8/4 for online booking and 3.7/4 for comparing the market).

Figure 35



Q32: How confident or otherwise are you in using the Internet for the following tasks related to air travel?
Base: all who have ever flown (2,749)

However, here again there were some sub-group differences with those aged 65+, those with access restrictions due to physical conditions and non-recent flyers consistently less confident than average as shown in Figure 36 below.

Figure 36

Confidence online - differences

COMPARING THE MARKET AND DECIDING ON THE BEST OPTION	
Total mean score	3.68
Significantly **higher** among:	
Frequent flyers	4.10
Aged 25-44	4.00
Significantly **lower** among:	
Non-recent flyers	3.30
PRM - physical	3.44
Aged 65+	2.87

BOOKING ONLINE	
Total mean score	3.75
Significantly **higher** among:	
Frequent flyers	4.17
Aged 25-44	4.11
Significantly **lower** among:	
Non-recent flyers	3.35
PRM - physical	3.42
Aged 65+	2.82

Q32: How confident or otherwise are you in using the Internet for the following tasks related to air travel?
Base: all who have ever flown (2,749)

These findings also agree with the qualitative research, which found that infrequent flyers and older travellers could find the process of booking online confusing and stressful.

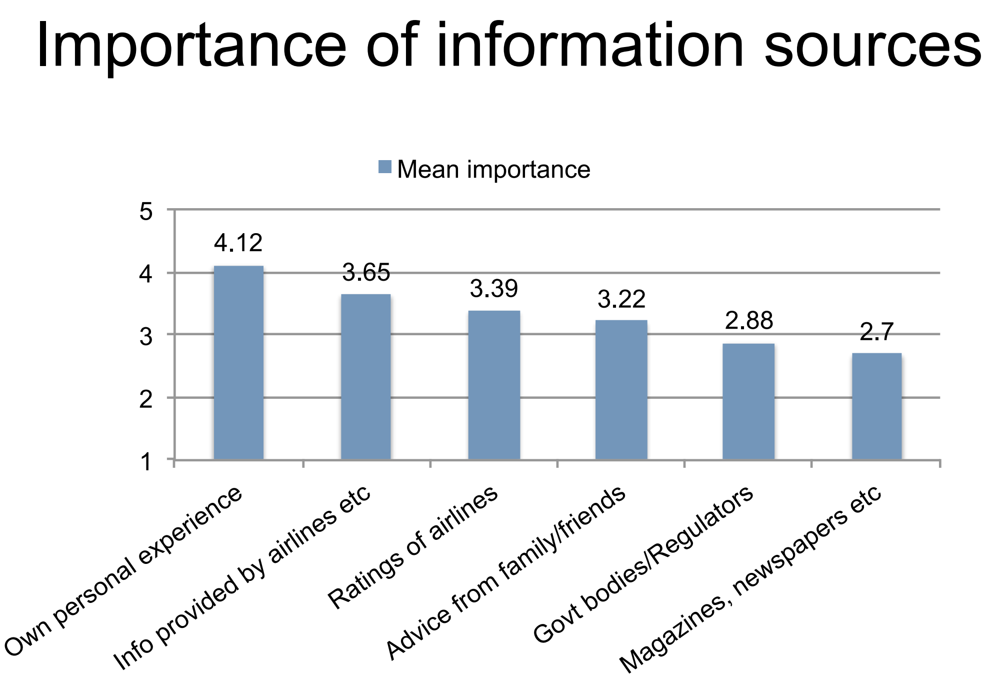
> *"Everybody can make a mistake but with these airline companies you make a mistake and they just charge you a load of money. So you're paranoid about getting it right."* (Leisure flyer, 45+, C2D, Bristol)

8.5 Relative importance of different sources of information

Flyers in the last 12 months were asked to rate the importance of various sources of information to them when making decisions about their most recent flight.

The flyer's own personal experience emerged as the most important information source overall. This was followed by information from suppliers (e.g. airlines, holiday companies, travel agents). A number also claimed that ratings were important, however when asked to specify which sources were used, most could not recall specific sites or referred to price comparison and user review sites rather than professional ratings services. Therefore, the actual level of usage of impartial airline safety or customer service ratings information is likely to be somewhat lower.

Figure 37



Q33a: When making decisions about your last flight, how important or not important to you were the following sources of information?
Base: all flown in last 12 months (1,470)

The qualitative research also found that previous personal experience and advice of friends and family were also seen as important sources of intelligence. People generally felt that a 'good' flight experience often came with trial and error of previous experience –more frequent flyers learnt the 'tricks' of the departure airport they had selected which meant they could avoid problems (e.g. when security was less busy, organising liquids into a transparent bag before arrival at the airport, the best places to wait/eat etc.).

> *"You learn when the queues are smaller for security – early in the morning you just sail through."* (Business flyer, 45+, Manchester)
>
> *"My parents flew South African Airlines and they said they were good – I'd consider them."* (Infrequent flyer, London)

In terms of specific online sources, price comparison sites were commonly used by people in the qualitative research. Tripadvisor was also popular to guide accommodation choices. In addition, a small number used specific tools such as SeatGuru or airline ratings sites to make flight-related decisions.

8.6 Gaps in information

All who have flown in the last year were also asked, in an open-ended question, whether there were any gaps in the information they had for this journey, or anything they wish they had known before embarking on it. Very few (just over 50 consumers out of the 3,000 sample) could nominate any information gap. Among those who did, there were a few mentions each of benefiting from more information on:

- Transport to/from airports and parking options at airports.
- Distances and procedures inside airports.
- Baggage allowances and hand luggage restrictions.
- Assistance options at airports and on-board.
- On-board aspects such as food, legroom, entertainment.

The qualitative research also uncovered some specific situations in which people felt less informed, for example when flying to new destinations or on ‘once in a lifetime’ holidays or a more complex travel journey – e.g. facilities at stopover airports, more information about connecting flights, or being ‘stung’ with additional charges (e.g. baggage allowance, charges for not bringing printed tickets).

> *“We had 4 hours at Abu Dhabi, which was awful, there was nowhere to sit! I wish I’d known in advance.”* (Leisure flyer, 45+, ABC1, London)

More generally, there was a view in the qualitative research that air travel pricing, while competitive, lacked transparency and could be confusing. For example, people mentioned not understanding differences in pricing between websites for seemingly identical airlines and flights. In addition, and of greater concern, were the apparently hidden costs on some websites (e.g. where the initially advertised price excludes checked luggage, taxes and credit card fees).

> *“It all gets a bit confusing, it’s all so competitive and then I often wonder why the airlines vary their prices from website to website.”* (Leisure flyer, 45+, ABC1, London)

In addition, in the qualitative research some PRM requested access to guidelines that airports and airlines are required to follow, and even a ‘charter of rights’, so that they knew what they should expect, as well as the process of getting redress where this was not followed.

Those with non-physical conditions and their carers would be interested in knowing what help is available for them. Even if they have no mobility-related needs, they would appreciate being able to notify the airport and airline of their condition so that staff are aware and respond appropriately and sensitively as required.

8.7 Views on insolvency protection

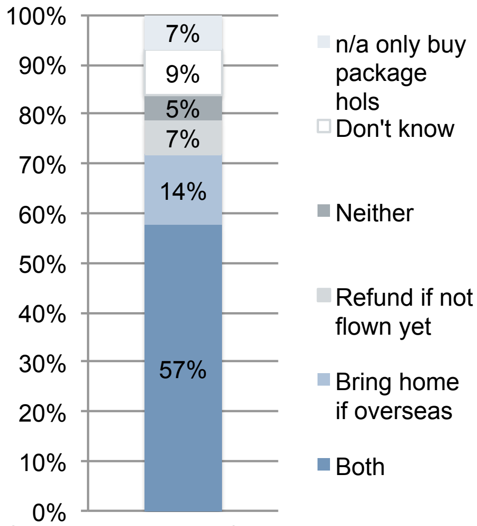
All who have ever flown were asked for their views on insolvency protection for companies which sell flights only and are not currently covered by insurance for the eventuality of them going out of business. There was an explanation provided about the current state of play with respect to insolvency protection prior to asking this question as it was expected that consumer knowledge of this area would be low.

When asked in this way, most felt that protection should be provided to consumers, with more than half (57%) wanting flight companies to be required either to bring the passenger home if they are overseas or to refund their money if they have not yet flown. An additional one in five (21%) felt that one or other of these options should be provided (14% said that companies should repatriate passengers and 7% that their money should be refunded if they have not travelled yet).

However, when asked what if anything they would be prepared to pay to contribute to this insurance, one-third (33%) were not able to answer and more than one in five (23%) said they would not pay anything. Of those who did nominate a figure, willingness to pay was unsurprisingly skewed towards lower end prices (only 4% were willing to pay more than £100, but this rises to 22% at £30 or less and 44% said they would pay £10 or less). These findings are also depicted in Figure 38 below.

Figure 38

Insolvency protection



Q36b How much, if anything, would you be willing to pay for this insurance?		
	%	Cumulative %
£101+	4	4
£51 - £100	4	8
£31 - £50	8	16
£21 - £30	6	22
£11 - £20	9	31
£1 - £10	13	44
Nothing	23	
Don't know	33	
Base: all saying yes to cover (2,146)		

Q36a: When you buy a flight on its own (rather than as part of a package), the company selling it is not generally required to have insurance in case of them going out of business. This differs from buying package holidays where companies have this insurance. Do you think companies selling flights on their own should be required to be have either of the following insurance in case of them going out of business? Base: all who have ever flown (2,749)

9. Attitudes to safety and security

9.1 Key findings

- The qualitative research found that safety and security did not appear to be influencing behaviour in most cases. However, safety and security are sensitive topics and there was a reluctance to discuss them in detail. A number did not want more information about safety or security because it was felt that engaging with this may make them feel less safe.
- As such, the quantitative survey was designed to explore views on safety and security initially in an unprompted way so as not to overly sensitise respondents or risk over-inflating the level of concern.
- In the quantitative research, of those with some previous flying experience, 36% say they are don't think about safety much, while 28% say that they are nervous flyers.
- Notwithstanding these differences, there is a high level of confidence in safety and security standards across the board – 70% of the entire population (which includes those who have never flown) agree that standards are higher now than they were 4-5 years ago, 58% that air travel is safer than other modes of transport and 54% that standards are as high as they can be.
- In addition, most flyers with some previous experience of security procedures feel that the right balance has been struck between screening and convenience to passengers (59%).
- However, there is one area where views are more mixed – almost half (49%) agree that a lack of consistency in security procedures concerns them. The qualitative research showed that this was seen to occur particularly between countries but also even sometimes within the same airport.
- Nonetheless, there is not an overwhelming appetite for more information on safety and security. While 39% would be open to this only 11% agree strongly, while 21% actively disagree that more information would be of interest.
- Confidence in safety and security standards overall has a strong positive correlation to the recency and frequency of travel. On the other hand, there was little difference in attitudes recorded between the interviews conducted before and after the Air Asia crash on the 28 December 2014.
- For the majority, views on safety and security have not had any effect on behaviour. However, 12% of past flyers say they have made changes either to the frequency or types of flights they have made as a result. In addition, 10% of those who have never flown say that safety concerns are a major reason for not flying, and another 13% say these are a minor factor.

9.2 Qualitative insights about consumer views on safety and security

9.2.1 General qualitative insights on safety and security

The qualitative research discussed safety and security in detail, and the findings from this phase fed into the way in which these issues were tackled in the quantitative research.

Safety and security in air travel were not generally front-of-mind considerations for participants in the qualitative research, whether in decision making, at point of booking or during their air travel experience. However, there was a strong latent awareness of safety and security issues in relation to air travel, due to the prominence of safety and security processes when people fly. This suggests that safety and security are fundamentally important issues, but things that people put to the back of their minds when flying.

Once prompted, people expressed a variety of feelings about safety and security. Some were inherently more nervous and fearful flyers while others were much more sanguine. There appeared to be some inverse correlation between level of concern and frequency of travel.

However, across the board there was a perception that air travel, particularly from the UK, is as safe and secure as it can be, and confidence that ‘someone’ is setting standards and monitoring practices to ensure this is the case.

Safety and security were felt to go hand in hand as terms, with keeping passengers safe being the fundamental intention of all measures. Participants’ definition extended beyond the CAA’s remit to include passenger health, heath and safety issues on-board aircraft, as well as immigration and customs risks to the UK.

A key finding with a bearing on future information provision is that people can be resistant to having safety and security brought to the front of their minds. This can make them feel very uncomfortable and could have the unintended consequence of making them feel less safe and possibly of undermining confidence in the aviation sector in general. It was found to be particularly challenging and emotionally difficult to engage with issues of risk and uncertainty in relation to safety and security, which could be brought to the forefront of people’s minds by information such as star ratings.

> *“I don’t think about things like that. I just book it and I get on with it, but now talking about all this it’s like ‘oh my word, all this could go wrong!’”* (Leisure flyer, 45+, ABC1, London)

9.2.2 Insights on views of PRM on safety and security

Another important finding from the qualitative research was that PRM could have specific needs and perceptions in relation to safety and security. Their views on safety in relation to air travel were often quite different to the general public, because they see many threats to their personal safety in the design of the aircraft cabin (e.g. narrow aisles, small toilet facilities, sharp edges of the drinks trolleys, risk of falling). Most of those with physical mobility problems employed a number of strategies to avoid having to stand up at any time during the flight.

PRM felt that the safety briefings on board the plane made no reference to their needs and were irrelevant to them – a few expressed concern that they could be 'left there' by staff, while others felt that they would probably be looked after in the event of an emergency but were unclear about how this would happen.

> *"With regards to me personally, you know you've got the oxygen mask and life jacket under the seat, but I can't bend."* (PRM, London)

With respect to security measures, those using wheelchairs could feel very uncomfortable being asked to stand up in public as they are at risk of falling even where they are technically able to stand up, and more than one participant felt that a private area should be provided for this purpose. PRM may encounter problems both removing and replacing shoes, belts and other items of clothing and are not always assisted to do this. They may require support to replace items in their luggage if removed for screening and they are not always assisted to do this.

> *"Last time I went… they said you have to take your shoes off. And even just taking off my shoes to go and pick the shoes up now I have to bend down. I can't bend and I'm not going to ask someone to pick up my shoes."* (PRM, London)

9.2.3 Guidance on design of safety and security quantitative questions

The quantitative questions about safety and security were designed using the insights from the qualitative research phase. This included ensuring the questions did not artificially prime respondents to consider safety and security, rather allowing it to be considered alongside other factors with respect to the different questions on attitudes, behaviour and choices.

The attitudinal statements about safety and security were also drafted after analysis of key findings from the qualitative stage. They represent some of the commonly mentioned themes highlighted in the qualitative research, which were then tested quantitatively to understand their prevalence in the general population.

9.3 Views on atitudinal statements about safety and security

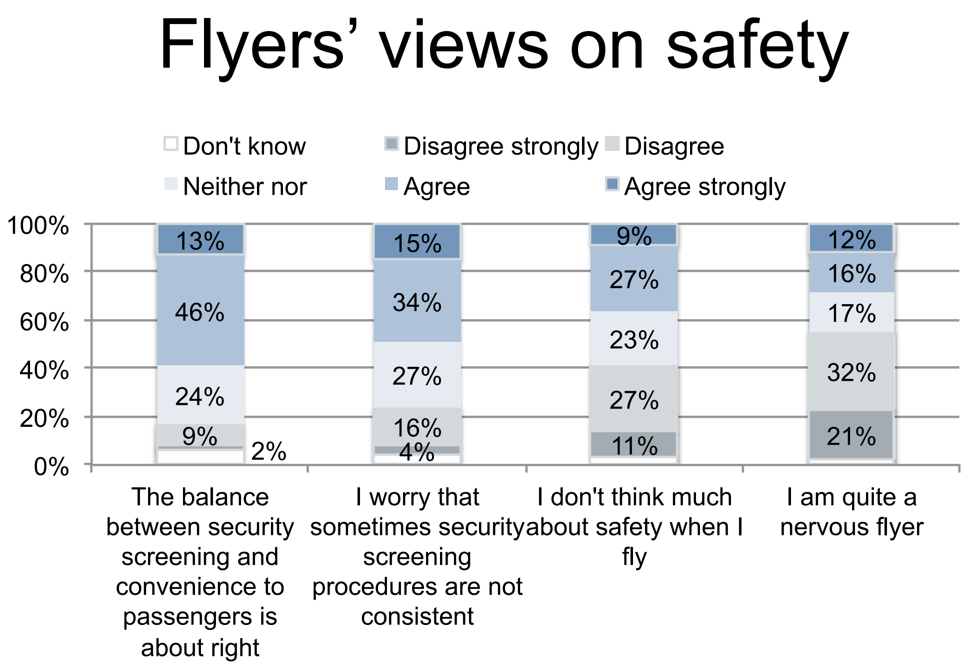
In the quantitative survey, consumers were asked the extent to which they agree or disagree with a number of statements about aviation safety and security. Some of the statements were asked of all consumers even if they had never flown, while others were relevant only to those who had at some time previously flown.

9.3.1 Flyers' views on safety

Of the statements asked just of flyers, there was majority agreement (59%) that 'the balance between security screening and convenience to passengers is about right'. However almost half (49%) also agreed that they 'worry that sometimes security procedures are not consistent'. This is broadly in line with the findings from the qualitative research where these concerns related particularly to perceived inconsistency between airports in different countries, but also in some cases also to differences within the same airport (e.g. due to inconsistencies between individual staff).

There were also two statements that were designed to help segment the flying population into those who are relatively unconcerned about safety and security compared to the more nervous flyers. In total, more than one in three (36%) fall into the former category, while fewer than three in ten (28%) agree that they are nervous when flying.

Figure 39



Q38a: To what degree do you agree or disagree with the following statements about air travel safety and security?
Base: all who have ever flown (2,749)

A number of groups were more likely to be unconcerned about air travel safety – these included business flyers, those aged 65+, frequent flyers and men. Therefore being less concerned appears to be driven by having more experience of air travel as well as possibly being more sanguine about life in the case of older groups. Conversely, those with access restrictions related to non-physical conditions were more likely to be nervous flyers, as were those who incurred previous disruption and those who requested access assistance. This indicates that being a nervous flyer may not be entirely related to safety fears but could also be related to other worries about the journey. Other groups more likely to be nervous included those aged 25-34 and with children at home, and BME groups.

There were also some variations in views about security procedures. The groups more likely to feel that the security balance is right include those unconcerned about safety, those who received access assistance, those who bought package holidays, medium-long haul flyers and frequent flyers. By comparison, nervous flyers are more likely to worry about inconsistency of security procedures, as are those who have previously made a complaint, those with access restrictions related to a physical condition and those aged 65+. Therefore views on security procedures appear to be influenced by a variety of factors including flyers' attitudes to safety, their expectations and experiences of travel, the type of journey they are embarking on and any physical limitations they may have.

These findings were also analysed by recency of flying, as well as any differences in attitudes between interviews conducted before and after the Air Asia crash which took place on 28 December 2014. The results are shown below – a significant finding is that the Air Asia incident did not appear to have much bearing on flyers' attitudes to safety and security in this survey.

Figure 40

Flyers' views on safety – other key sub-group comparisons

All who agree	Total %	Recent flyers %	1-3 years %	4+ years %	Before 28/12 %	After 28/12 %
Balance between safety and security about right	59	65	57	48	59	59
Security procedures not consistent	49	48	54	46	49	48
Don't think much about safety when I fly	36	37	40	32	38	33
I'm quite a nervous flyer	28	27	32	29	30	26

Q38a: To what degree do you agree or disagree with the following statements about air travel safety and security?
Base: all who have ever flown (2,749)

9.3.2 The public's views on safety

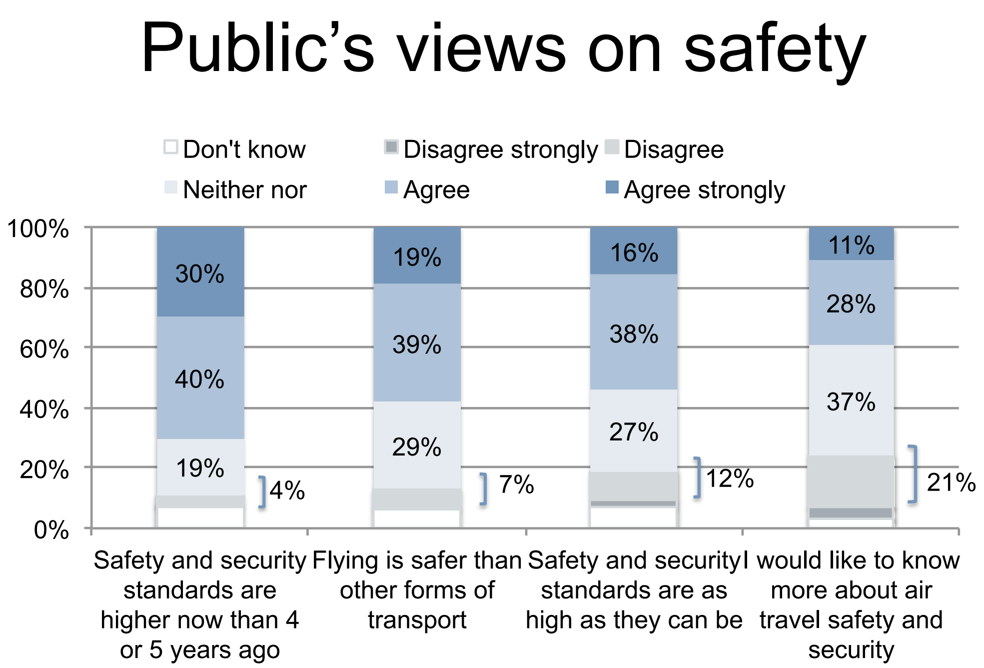
All consumers, even those who had never flown, were asked the extent to which they agree or disagree that:

- 'Safety and security standards are higher now than they were 4 or 5 years ago'.
- 'Flying is safer than other forms of transport'.
- 'Safety and security standards are as high as they can be'.
- They 'would like to know more about air travel safety and security'.

A clear majority agreed that safety and security standards are relatively higher than they were 4 or 5 years ago (70%). More than half also agreed that flying is comparatively safer than other forms of transport (58%) and that standards are as high as possible (54%). And on all of these measures, only tiny minorities disagreed, with most of the remainder not offering a view.

However, as expected given the qualitative research findings, there was a polarised response on whether more safety and security information would be of interest. Just under two in five said they would be interested (39%) but one in five said they would not (21%) and more than a third neither agreed nor disagreed on this (37%).

Figure 41



Q38a: To what degree do you agree or disagree with the following statements about air travel safety and security?
Base: all (3,000)

There were some clear differences in responses according to recency of flying behaviour and attitudes to safety. Recent flyers and those unconcerned about safety were more likely to regard standards to be higher now, standards to be as high as they can be and flying to be safer than other transport modes. Non-recent flyers along with nervous flyers were relatively less likely to feel this way (although the majority still agreed), and nervous flyers expressed a greater interest in more safety and security-related information.

Figure 42

Public's views on safety – key sub-group comparisons

All who agree	Total %	Recent %	Non-recent %	Nervous %	Uncon-cerned %	Before 28/12 %	After 28/12 %
Standards higher now than 4-5 years ago	69	75	67	78	77	70	69
Flying safer than other forms of transport	58	67	53	56	77	59	55
Standards as high as they can be	54	61	50	57	70	54	55
Would like to know more about safety & security	39	39	41	60	41	39	37

Q38a: To what degree do you agree or disagree with the following statements about air travel safety and security?
Base: all (3,000)

A further breakdown of non-recent flyers into those who flew 'within the last 1-3 years', '4+ years ago', and 'never', shows an positive relationship between confidence in safety standards and recency of travel, with the lowest agreement levels overall coming from those who have never flown. Interest in receiving more safety and security related information also peaks for those who flew within the last 1-3 years.

Figure 43

Public's views on safety – further breakdown of non-recent flyers

All who agree	Total %	All Non-recent %	1-3 years %	4+ years %	Never %
Standards higher now than 4-5 years ago	70	67	72	63	47
Flying safer than other forms of transport	58	53	58	50	31
Standards as high as they can be	54	50	56	45	37
Would like to know more about safety & security	39	41	45	37	24

Q38a: To what degree do you agree or disagree with the following statements about air travel safety and security?
Base: all (3,000)

Other groups who were more likely to express an interest in safety and security information included those who requested access assistance, people in BME groups and those who incurred a previous disruption.

The concerns of people with heath-related access restrictions in relation to safety and security were explored in more detail in the qualitative research. It found that more information on safety procedures, particularly for physically disabled passengers, was requested because the current briefings make no reference to them and how they will be assisted in the event of an emergency.

> *"Amongst the panic, I need to know that someone's going to come to me."* (PRM, London)

Those with an appetite to know more about safety and security were also asked what specifically they would wish to know, in a open-ended question. A number were not able to specify what they were looking for, and some expressed a desire for general reassurance that everything possible was being done. More specific suggestions, each made by a few people only, were to provide information on:

- Behind the scenes procedures, particularly any improvements to these; and
- Safety ratings, the incidence of accidents or near misses.

However, it is worth noting that in the qualitative research, where this issue was explored in greater depth, the majority did not see any role for more information on safety, and some were actively against this as they felt it would increase their fears and anxieties. For some, even the process of discussing air travel safety and security as part of this research made them feel anxious (and the discussions needed to be handled with care and sensitivity as a result).

> *"It's like the small print. We know it's there but… people can go into too much detail. You'd never leave the country again would you?"* (Leisure flyer, 20-44, C2D, Manchester)

There was a view in the qualitative research that most of what was involved in making it safe and secure for people to travel by air was outside the control of individual passengers and so they were not convinced that more information would have any benefit. There was also a view that some of the information relating to security needed to be kept out of the public domain to avoid the risk of security breaches.

> *"There's certain information that for our security I believe has to be kept from the public. Just tell me what I've got to do to stay safe. Maybe I'm ignorant, but that's enough for me."* (Business flyer, 45+, Manchester)

9.3.3 Views on specific safety information options from the qualitative reserach

In the qualitative research, participants were prompted with two specific ideas for safety related information:

- Publishing lists of airlines blacklisted in the European Union; and
- Publishing a safety star rating system for airlines.

Reactions to publishing lists of blacklisted airlines were mixed, with only a minority seeing a practical role for this information when deciding which carriers to use for internal flights in foreign countries. The blacklisted airlines were felt to be irrelevant by others, because they would be extremely unlikely to come into contact with them. However, some felt that it highlighted the CAA's active role in protecting the British public and that it increased confidence in the safety of airlines that were able to use our airspace.

> *"If you've gone into a travel agent to book your holiday, they're not going to put you on a flight if they're not allowed in the UK. They're not going to be in the UK."* (Leisure flyer, 20-44, ABC1, Bristol)

People also had mixed reactions to the safety ratings idea when this was presented. Safety and security are not currently choice factors in decision-making and people felt that there were risks in making them more prominent. The majority felt that focussing on safety and security might put them off air travel and undermine confidence in the sector; however a minority expressed interest in seeing this information once prompted. It was also suggested by a few that while the safety rating might not present an active choice factor for consumers, it would encourage airlines to ‘raise their game’ in order not to have a competitive disadvantage against their rivals.

> *“It promotes competition between airlines so ultimately the standards will rise as well.”* (Leisure flyer, 20-44, C2D, Manchester)

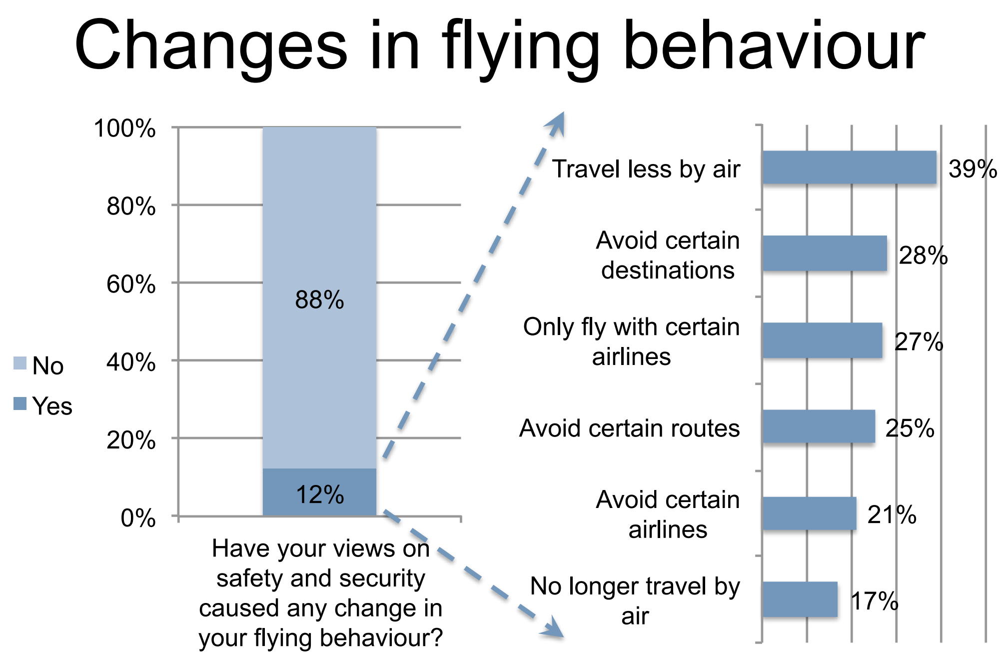
It is important to consider potential knock-on effects of introducing a star ratings system into this market. The star rating system could potentially undermine trust in air travel in general by forcing people to engage with risk and uncertainty in relation to safety and security. There is also a difficulty in establishing how safe is ‘safe enough’ and some difficulty in understanding the basis of the measures.

> *“The hours that they fly and the age of aircraft, it’s quite hard to put a 4 star on an aircraft.”* (Leisure flyer, 20-44, ABC1, Bristol)

9.4 Whether flying behaviour been affected by views on safety and security

All who have ever flown were asked in the survey whether their views on safety and security have resulted in any change to their flying behaviour. A large majority (88%) reported no change, while just over one in ten (12%) said that there had been. Of this minority, the main change reported was travelling less by air (39%), followed by avoiding certain destinations (28%), only flying with certain airlines (27%), avoiding certain routes (25%) and avoiding certain airlines (21%). Fewest report no longer flying by air as a result (17%). Flyers who are more likely to have changed their behaviour in some way include nervous flyers, PRM and people from BME groups.

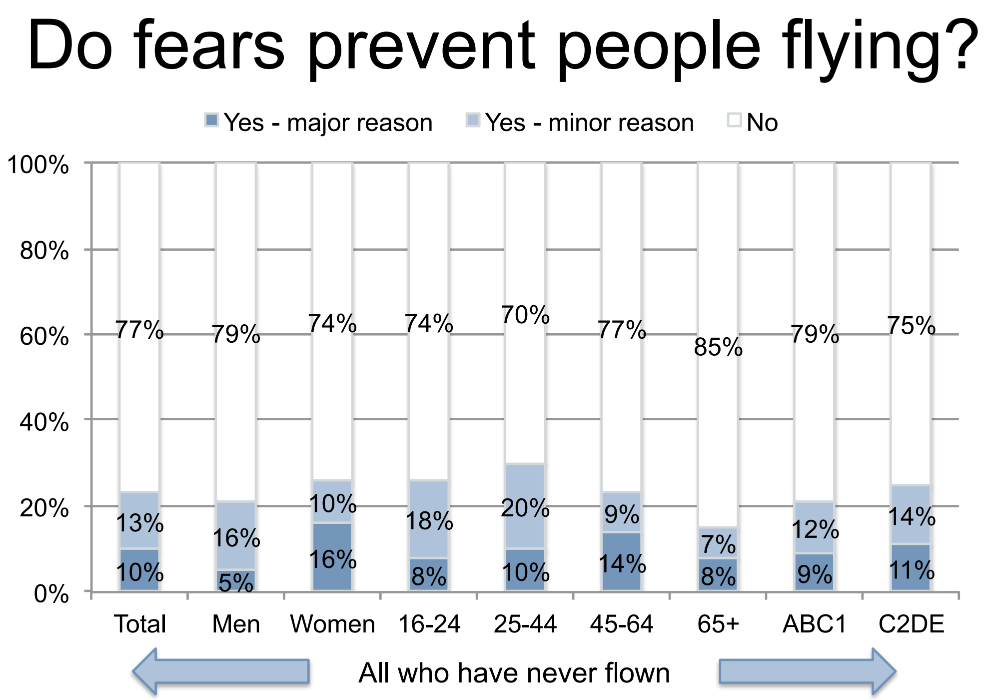
Figure 44



Q39a: Have your views on safety and security caused any change in your flying behaviour? Base: all who have ever flown (2,749)
Q39b In what way has your flying behaviour changed? Base: all changed behaviour (323)

In addition, those who have never flown were asked whether concerns about safety and security are a reason that they have never flown. A large majority (70%) say it is not but one in ten (10%) say it is a major reason and another one in eight (13%) say it was a minor reason. The impact of safety concerns among this group is higher among younger groups (25-44, 16-24) and women.

Figure 45



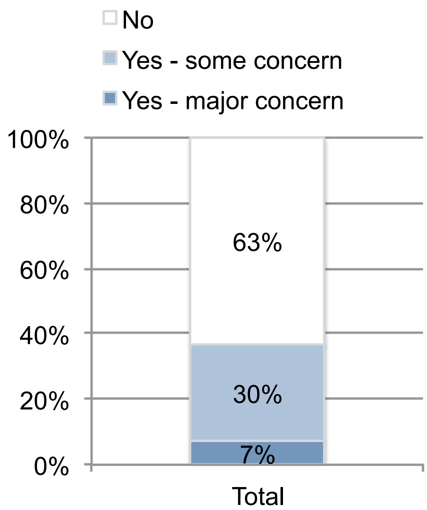
Q40: Are concerns about safety or security a reason that you have never flown?
Base: all who have never flown (251)

9.5 Whether airline leasing is a safety concern

All who have ever flown were also informed that the airline they choose for a flight may sometimes lease the plane and its flight crew from another airline. They were then asked whether this would cause them any concern or not. Most previous flyers say they would be unconcerned about this (63%) and, of the remainder, far more said it would be of 'some concern' (30%) than that it would be a 'major concern' (7%). These findings are highlighted in Figure 46 below.

Figure 46

Concerns over aircraft leasing



Sub-group differences	
	%
Total concerned	37
Significantly **higher** among:	
Made complaint	54
Nervous flyers	52
Previous disruption	52
Self PRM	47
Significantly **lower** among:	
Unconcerned	30
Flew 4+ years ago	32

Q37a: Sometimes the airline you choose for a flight may lease the plane you fly on and its flight crew from another airline. Would this cause you any concern, or no concern?
Base: all who have ever flown (2,749)

More likely to be concerned include those who have previously made a complaint, nervous flyers, those who incurred previous disruption and PRM. This suggests that safety is not the only issue that has a bearing on concerns, among the minority who express them, but that it also has relevance to some in terms of the potential impact on flight punctuality and access assistance offered on-board.

Those who said leasing would be of concern were asked to specify the nature of their concerns in an open-ended question. A number of the responses relate to questions over safety and security standards in a leased operation, however there were also comments about potential differences in the customer service quality or standards generally, and also about losing the benefits of familiarity and reputation if the service is being leased from an airline unknown to the passenger.

This finding is supported by the qualitative research in which there was little safety concern or interest in the fact that airlines may lease from foreign companies or not manage their own fleet. Leased planes were still perceived to be required to adhere to the same standards, and consumers were used to these types of 'outsourcing' arrangements in other sectors so saw nothing strange in it.

> "*My belief is most of the aircrafts are leased anyway. When you look at the capital cost of buying an aircraft most of them are leased, they're not going to invest in a million jumbo jets.*" (Business flyer, 45+, Manchester)

"British Gas and BT are owned by overseas companies. Eon's owned by overseas, so why shouldn't the airlines be? It's quite common." (Leisure flyer, 45+, ABC1, London)

10. Role of the CAA

10.1 Key findings

- Awareness and perceptions of the role of the CAA were only explored in depth in the qualitative research. This is because awareness was found to be so low that a considerable amount of information was required to be given about the CAA before participants could make an informed comment about the regulator and its role. This level of priming would not have been feasible in the survey.
- People tend not to think too much about who is responsible for safety and security, because this is not a topic that many feel comfortable discussing or thinking about in detail.
- When prompted, participants believed that there is an official body responsible for safety and security standards in the UK, and some limited awareness of the CAA.
- Once informed of the CAA's role, there was general support for the safety and security aspects, although very little desire to know more about this – it was expected to remain a 'behind the scenes' regulator.
- There was some confusion as to how the CAA could enforce its role in protecting consumer interests and a feeling that this must be secondary to its safety and security role where the market is functioning effectively.
- One exception to this was the CAA's role in ensuring PRM have equal access to air travel – this was strongly supported by those who are affected and a more high-profile, customer-facing role could be imagined for CAA in relation to upholding this group's rights and receiving complaints.
- The qualitative research indicated there was very little understanding of the CAA's environmental remit and this was felt to be much less important than the other aspects of its role, reflective of the low personal priority most appeared to place on the issue relative to the other aspects of the CAA's work.

10.2 Awareness and perceptions of the CAA

The CAA was initially introduced through the lens of safety and security and it was therefore difficult to elicit an unprompted response about perceptions of the organisation and its role and responsibilities.

When prompted, people believe there is an official body responsible for safety and security standards in the UK. There was some mention of the CAA, with other organisations mentioned as perhaps having a role varying from ATOL/ABTA to ‘government’ or ‘a regulator/standards body’.

> *“Everything is regulated. Schools, communications. You would think so… it’s a million dollar business.”* (Leisure flyer, 20-44, C2D, Manchester)

Perceptions of the CAA were limited but where people had any familiarity at all it was usually associated with air traffic control, as an established, respected and authoritative organisation. However, there was also a sense that low awareness of a regulator was a good thing, because it meant that the sector was functioning well and the regulator was performing its duty.

Only a small minority mentioned without prompting that the CAA might be responsible for safety and security, but there was no great surprise when the CAA was introduced and its remit described, except in relation to its role in improving consumer choice and value, which some did not understand, having not seen any obvious evidence of this.

> *“I think government bodies in general you never hear of them until there’s been a massive disaster and then they’re called to account and then there’s a big sort of scare and changes. You don’t hear about them generally because it means they’re doing their job.”* (Leisure flyer, 20-44, ABC1, Bristol)

10.2.1 Response to CAA’s role and remit

The role and remit of the CAA, once described, sounded plausible and sensible to consumers. There was approval for the idea that all government responsibilities in relation to air travel should be ‘under one roof’ and a feeling that the CAA was probably the best body to do this.

Knowing that the CAA has an active, hands-on role in ensuring safety and security through setting standards but also inspecting compliance visibly relaxed some participants who had become nervous at the in-depth discussion of safety and security issues.

> *“It’s good that it’s going on, but I don’t want to know about it.”* (Leisure flyer, 20-44, C2D, Manchester)

However, whilst not in conflict with its role in ensuring safety and security, people had no idea how the CAA might fulfil its consumer choice and value role and could not point to any examples of work it might do in this area. Although the process of choosing a flight can be confusing, people felt that the air travel market functioned relatively well, that consumers did have choice and that they knew what they were getting if they chose a budget airline over a more premium carrier. However, there was felt potentially to be some latent benefit to consumers in knowing that someone was looking out for their interests.

There was even less awareness, comprehension or interest in the CAA's role in relation to environmental matters. People generally felt that the CAA's work in relation to safety and security was most important and that its environmental and consumer choice role should not distract from these activities.

There may also be some difficulty in the CAA assuming a public information role, because it is currently seen as a 'behind the scenes' regulator. People have no awareness of the CAA's website or any communications activity it has undertaken with the public. In fact, there is some scepticism of the CAA assuming a public facing role – its energies are felt to be best deployed in ensuring safety and security rather than informing people about it. This could also have the knock-on effect of making people feel less safe and secure rather than more so.

> *"I think they could do a lovely advert and loads of banners at the airport but I don't care, because I just want to get where I'm going."* (Leisure flyer, 20-44, ABC1, Bristol)

10.2.2 Views on CAA's role in relation to PRM

Similarly, there was no unprompted awareness of the role of the CAA in relation to PRM but significant support, especially from those who themselves have such restrictions, for both the duty of equality of access and the role in handling complaints. PRM themselves felt positive and empowered when they heard about this role.

> "*It's good because we should all be able to go on holiday, disabled people too. So I think it's really good to make sure that happens."* (PRM, Manchester)

A more high profile, customer-facing role could be imagined for CAA in relation to upholding access rights and receiving complaints. Some PRM requested felt the CAA should provide a 'charter of rights' so that they knew what they should expect, as well as the process of getting redress where this was not followed, for example, at point of booking. However, in order for all PRM to be able to access it, the question about mobility assistance in the booking process would need to explicitly mention people with non-physical disabilities and conditions.

"They should send out a brochure with all that information – your rights and where to go if you have a problem – when you tick the box when you book." (PRM, Manchester)

Appendix 1 – Additional profiling data

A1.1 Characteristics of most recent flight

Purpose of most recent trip (Q8)			**Length of most recent flight (Q13)**		
	Sample	%		Sample	%
Holiday	2,115	77	Domestic	156	11
Visiting friends or relatives	474	17	International < 3 hours	595	40
Business	144	5	International more than 3, less than 7	448	30
Can't remember	16	1	International 7 or more	271	18
Base: all who have ever flown (2,749)			Base: all flown in last 12 months (1,470)		
Package vs. flight only (Q14)			**Accompanied by children under 16 (Q15)**		
	Sample	%		Sample	%
Flight only	845	61	Yes	383	28
Flight and accommodation booked as part of a package	520	38	No	998	72
Don't know	16	1			
Base: all flown in last 12 months, most recent flight leisure (1,381)			Base: all flown in last 12 months, most recent flight leisure (1,381)		

Airline - most recent trip (outbound flight) (Q16)			Departure airport – most recent trip (Q18a)		
	Sample	%		Sample	%
EasyJet	302	21	London Heathrow	287	20
British Airways	295	20	Manchester	280	19
Ryanair	165	11	London Gatwick	237	16
Thomson Airways	138	9	Birmingham Intl	117	8
Thomas Cook Airlines	89	6	London Stansted	95	6
Monarch Airlines	79	5	London Luton	70	5
Virgin Atlantic	75	5	Newcastle	57	4
Flybe	46	3	Bristol	55	4
Jet2	40	3	Glasgow	51	3
Aer LIngus	25	2	Edinburgh	34	2
Emirates	19	1	Belfast Intl	33	2
bmi	15	1	East Midlands	31	2
Lufthansa	13	1	Leeds Bradford	24	2
KLM	12	1	Liverpool	21	1
Delta	10	1	Cardiff	12	1
American Airlines	8	1	Doncaster	9	1
Norwegian	8	1	Belfast City	8	1
United Airlines	8	1	Exeter	8	1
Less than 1% not listed			Less than 1% not listed		
Base: all flown in last 12 months (1,470)			Base: all flown in last 12 months (1,470)		
			Return to same airport – most recent trip (Q18a)		
				Sample	%
			Yes	1,432	97
			No	38	3
			Base: all flown in last 12 months (1,470)		

A1.2 Demographics[10]

Gender (Q3)			**Children under 16 living at home (Q42)**		
	Sample	%		Sample	%
Male	1,455	48.5	Yes	814	27
Female	1,545	51.5	No	2,186	73
Age (Q4)			**Ethnicity (Q43)**		
	Sample	%		Sample	%
16 - 19	179	6	White	2,734	91
20 - 24	248	8	Black	48	2
25 - 34	495	17	Asian	100	3
35 – 44	484	16	Chinese	24	1
45 - 54	518	17	Mixed race	41	1
55 – 64	421	14	Other ethnicity	12	< 0.5%
65 – 74	357	12	Prefer not to say	41	1
75+	298	10			
Region (Q2)			**Internet access at home (Q5)**		
	Sample	%		Sample	%
London	311	12	Yes	2,609	87
South East excl London	521	21	No	391	13
South West	197	8			
East of England	199	8	**Nation (Q1)**		
East Midlands	170	7		Sample	%
West Midlands	262	10	England	2,503	83
North East	158	6	Scotland	224	7
North West	514	21	Wales	166	6
Yorkshire and Humberside	174	7	Northern Ireland	107	4

[10] As mentioned in the introduction, ONS-based quotas were set to ensure that the sample is representative of gender, age and internet usage at home. In addition, responses by location were carefully monitored during the data collection and the maximum variation from actual population distributions is 1% at a nation level and 6% at an English region level

Appendix 2 – Questionnaire

Civil Aviation Authority (CAA) air travel consumer survey

INTRODUCTION

This research is about air travel and is being undertaken on behalf of the Civil Aviation Authority, the UK's aviation regulator. We are interested in hearing from you even if you have not flown recently. The survey should take no longer than 15 minutes to complete and your answers will be treated in confidence, in accordance with the Market Research Society's Code of Conduct.

Section 1: Initial quota-based questions

Firstly, some quick questions to check whether you are eligible to complete the survey.

Q1 ASK ALL: Which country to you live in?

England 1
Scotland 2
Wales 3
Northern Ireland 4

Q2 ASK THOSE LIVING IN ENGLAND (Q1 CODE 1): In which of the following regions do you live?

London 1
Elsewhere in South East (not London) 2
South West 3
East of England 4
East Midlands 5
West Midlands 6
North East 7
North West 8
Yorkshire and Humberside 9

Q3 ASK ALL: Are you male or female?

Male 1
Female 2

Q4 ASK ALL: In which age range do you fit?

16-19 1
20-24 2
25-34 3
35-44 4
45-54 5
55-64 6
65-74 7
75+ 8

Q5 FOR TELEPHONE SURVEY ONLY, ASK ALL: Do you have access to the Internet at home?

Yes .... 1 - THANK AND CLOSE
No .... 2 - CONTINUE

Section 2: Air travel experience

Now we would like to find out about your flying experience.

Q6 ASK ALL: When was the last time you flew from a UK airport? This could have been either to travel within the UK or to go abroad.

Within the last 12 months 1
Between 1 and 3 years ago 2
Between 4 and 10 years ago 3
More than 10 years ago 4
Never 5

Q7a ASK THOSE WHO HAVE FLOWN WITHIN LAST 12 MONTHS: How many trips by air have you made within the last 12 months? Please count outward and return flights and any transfers as one trip.

1 1
2 2
3 3
4+ 4

Q7b ASK THOSE WHO HAVE FLOWN BETWEEN 1-3 YEARS AGO: How many trips by air have you made within the last 1-3 years? Please count outward and return flights and any transfers as one trip.

1 1
2 2
3 3
4+ 4

Q8 ASK ALL EXCEPT THOSE WHO HAVE NEVER FLOWN: What was the main purpose of your most recent trip by air? SINGLE RESPONSE ONLY.

Holiday 1
Visiting friends or relatives 2
Business 3
Can't remember 4

Q9 ASK THOSE WHO HAVE NOT FLOWN WITHIN LAST 12 MONTHS: Which of the following were reasons that you have not flown within the last 12 months? RANDOMISE LIST, MULTI-CODE ALLOWED.

Budget constraints 1
Family changes (e.g. pregnancy, looking after small children)........ 2
Health issues 3
Difficulty accessing and/or using airports or flying.......................... 4
FLYERS: Previous poor experience when travelling by air (specify)5
Concerns about the environmental impacts of flying 6
Concerns about air travel (specify) 7
Prefer another mode of transport (e.g. car, train, boat) 8
Have not made any trips where flying would be an option 9
Other (specify) 10

Q10 ASK THOSE WHO HAVE NOT FLOWN WITHIN THE LAST 12 MONTHS: In the last 12 months, have you travelled abroad for business or leisure purposes using another mode of transport?

Yes 1
No 2

Q11a ASK ALL: Do you have a disability or long-term health condition that makes accessing and/or using airports or flying difficult? This could include:

- A physical disability or health condition e.g. affecting your movement, balance, vision or hearing
- A non-physical disability or health condition e.g. affecting thinking, remembering, learning, communications, mental health or social relationships

Yes - physical disability/health condition .... 1 (PRM ROUTING)
Yes – non-physical disability/health condition .... 2 (PRM ROUTING)
No 3

Q11b ASK PRM WHO HAVE NOT FLOWN IN THE LAST 12 MONTHS (Q6 CODES 2-5 AND Q11a CODES 1-2): Were difficulties accessing and/or using airports or flying a reason you have not flown in the last 12 months?

Yes 1
No 2

Q12 ASK ALL: In the next 12 months, do you expect that you will fly more, the same amount or less compared to now?

More 1
Same amount/no change 2
Less 3
Don't know 4

Section 3: Recent flyers - Further flight details

These next questions are to understand the details of your most recent flight within the last 12 months, and how decisions were made about it.

Q13 ASK FLYERS WITHIN LAST 12 MONTHS (Q6 CODE 1): Was this flight domestic (i.e. within the UK) or international? If international, how long was the flying time?

Domestic.. 1
International - less than 3 hours .... 2 (SHORT HAUL CODING)
International – more than 3 but less than 7 hours .... 3 (MID HAUL CODING)
International - 7 hours or more .... 4 (LONG HAUL CODING)

Q14 ASK FLYERS WITHIN LAST 12 MONTHS (Q6 CODE 1) WHO TRAVELLED FOR LEISURE PURPOSES (Q8 CODES 1&2): Was this flight booked separately from your accommodation or as part of a package that also included accommodation?

Flight booked separately from accommodation.............................. 1
Flight and accommodation booked as part of a package............... 2
Don't know.. 3

Q15 ASK FLYERS WITHIN LAST 12 MONTHS (Q6 CODE 1) WHO TRAVELLED FOR LEISURE PURPOSES (Q8 CODES 1&2): Were you accompanied on this flight by any children aged under 16 years?

Yes 1
No.. 2

Q16 ASK FLYERS WITHIN LAST 12 MONTHS (Q6 CODE 1) Which airline did you travel with on this most recent flight? If you flew with more than one airline, please indicate which airline you flew on your outbound journey from the UK.

Aer Lingus 1
bmi... 2
British Airways 3
CityJet.. 4
EasyJet... 5
Flybe 6
Monarch Airlines.. 7
Ryanair 8
Thomas Cook Airlines 9
Thomson Airways.. 10
Virgin Atlantic.. 11
Other (specify) 12

Q17a ASK FLYERS WITHIN LAST 12 MONTHS (Q6 CODE 1) WHO ARE NOT PRM (Q11a CODE 3): Did you make this flight with anyone who has a disability or long term health condition that makes accessing and/or using airports or flying difficult? This could include:

- A physical disability or health condition e.g. affecting your movement, balance, vision or hearing
- A non-physical disability or health condition e.g. affecting thinking, remembering, learning, communications, mental health or social relationships

Yes – long-term physical disability/health condition .... 1 (ADD TO PRM ROUTING)
Yes – long-term non-physical disability/health condition .... 2 (ADD TO PRM ROUTING)

No 3

Q17b ASK FLYERS WITHIN LAST 12 MONTHS (Q6 CODE 1) WHO ARE NOT PRM (Q11a CODE 3): Did you, or anyone travelling with you, have any short-term injury, temporary health condition or pregnancy that made accessing and/or using the airport or flying difficult on this most recent flight?

Yes .... 1 (ADD TO PRM ROUTING)
No 2

Q18a ASK FLYERS WITHIN LAST 12 MONTHS (Q6 CODE 1): From which UK airport did you depart on this flight? MAKE LIST ORDER ALPHABETICAL.

London Heathrow 1
London Gatwick 2
London Stansted 3
London Luton 4
Manchester 5
Edinburgh 6
Birmingham 7
Glasgow 8
Bristol 9
Newcastle 10
Other (specify) 11

Q18b ASK FLYERS WITHIN LAST 12 MONTHS (Q6 CODE 1): Did you return to the same UK airport?

Yes 1
No 2

Q19a ASK FLYERS IN LAST12 MONTHS (Q6 CODE 1): What was the primary mode of transport that you used to get to [AIRPORT MENTIONED IN Q18a}? SINGLE RESPONSE ONLY.

A car which you parked at or near the airport................................ 1
A lift from a family member or friend.. 3
A taxi or mini-cab 4

Public transport (e.g. train, the Underground, bus) 5
Other.. 8

Q19b ASK FLYERS IN LAST 12 MONTHS (Q6 CODE 1): When was the decision made to use [MODE OF TRANSPORT MENTIONED IN Q19a]?

At the time of booking the flights 1
After the time of booking but before the day of the flight................. 2
On the day of the flight 3
Not applicable/someone else made the decision on transport........ 4

Q19c ASK FLYERS IN LAST 12 MONTHS (Q6 CODE 1): At the time of booking your flight, how aware or otherwise were you of the different attributes (e.g. costs, journey time, availability) of the transport options to get to [AIRPORT MENTIONED IN Q18a]?

Fully aware 1
Had some idea 2
Not aware 3

Section 4: Recent flyers - Decision-making and choice factors

Q20a ASK FLYERS IN LAST 12 MONTHS (Q6 CODE 1): Were you solely or jointly responsible for the choice of this flight?

Yes, solely or jointly responsible for choice of this flight................. 1
No, not responsible for choice of this flight..................................... 2

Q20b ASK FLYERS IN LAST 12 MONTHS (Q6 CODE 1): Were you the one who booked this flight

Yes 1
No... 2

Q21 ASK BOOKERS (Q20b CODE 1): How was this flight booked? SINGLE RESPONSE ONLY.

On the website of the airline or holiday company........................... 1
By phoning the airline or holiday company...................................... 2
On the website of a price comparison service or travel agent......... 3
By phoning a flight comparison service or travel agent.................. 4
In person at a holiday company's office 5
In person at a travel agent... 6
Through my company's travel agent or department........................ 7
At the airport... 8
Other... 9
Can't remember... 10

Q22 ASK BOOKERS (Q20b CODE 1): How far in advance of the date of travel was the booking made for this flight?

More than 12 months before date of travel....................................... 1
4-12 months before date of travel.. 4
2-3 months before date of travel.. 5
Within 1 month of date of travel... 6
Can't remember.. 7

Q23 ASK DECISION MAKERS (Q20a CODE 1): To what extent were the following factors considerations in your choice of this flight? Please note that while all of these factors might be important to you as a flyer, we are interested in your specific considerations for this flight. RANDOMISE LIST

	Very important consideration	Somewhat important consideration	Not important	No choice available
a) The airline or holiday company to fly with	1	2	3	4
b) The departure airport	1	2	3	4
c) The flight time or route	1	2	3	4
d) The price of this flight	1	2	3	4

Q24a/b ASK THOSE FOR WHOM AIRLINE/HOLIDAY COMPANY WAS IMPORTANT (Q23a CODES 1&2): You said that the airline or holiday company was an important consideration in your choice of this flight. Why did you choose to fly with this airline or holiday company? Please note that while all of these factors might be important to you as a flyer, we are interested in the specific reasons that you chose this airline or holiday company. RANDOMISE LIST, MULTI-CODE ALLOWED IN 24a, SINGLE RESPONSE IN Q24b

		(a) Select all reasons	(b) Select main reason
I.	Previous experience/familiarity	1	1
II.	Good reputation or brand	2	2
III.	Has low cost flights or packages	3	3
IV.	Good customer service	4	4
V.	Comfortable seats or legroom	5	5
VI.	Collect Frequent Flyer Points/Air Miles	6	6
VII.	Good record of punctuality/not many delays	7	7
VIII.	High standards of safety	8	8
IX.	Airline is concerned about the environment (e.g. carbon offsetting policy, use modern fuel efficient aircraft etc.)	9	9
X.	PRM ONLY – Offers assistance that meets my/my companion's needs	10	10
XI.	Other (specify)	11	11

Q25a/b ASK THOSE FOR WHOM DEPARTURE AIRPORT WAS IMPORTANT (Q23b CODES 1&2): You said that the departure airport was an important consideration in your choice of this flight. Why did you choose to fly from this airport? Please note that while all of these factors might be important to you as a flyer, we are interested in the specific reasons that you chose this departure airport.

		(a) Select all reasons	(b) Select main reason
I.	Easy to get to from where I live	1	1
II.	Variety of retail and food outlets	2	2
III.	Normally less crowded/has fewer queues than other airports	3	3
IV.	Comfortable waiting areas and departure lounges	4	4
V.	Good record of punctuality/not many delays	5	5
VI.	High standards of security	6	6
VII.	Good parking facilities at the airport	7	7
VIII.	PRM ONLY – Offers assistance that meets my needs	8	8
IX.	Other (specify)	9	9

Q26a ASK THOSE FOR WHOM PRICE WAS IMPORTANT (Q23d CODES 1&2): You said that the final price of the flight was important consideration in your choice of this flight. Which of the following most closely describes the kind of price you were looking for when you chose this flight?

The cheapest possible price 1
A price that represented good value even if it wasn't the cheapest 2

Q26b ASK THOSE FOR WHOM PRICE WAS IMPORTANT (Q23d CODES 1&2): To what extent did you, or someone on your behalf, shop around and compare prices between providers before choosing this flight?

A lot of shopping around/comparing prices 1
Some shopping around/comparing prices 2
Little or no shopping around/comparing prices................................ 3

Q26c ASK THOSE FOR WHOM PRICE WAS IMPORTANT (Q23d CODES 1&2): Did you do any of the following specifically to secure a lower price? RANDOMISE LIST, MULTI-CODE ALLOWED.

Choosing a different airline from the one you prefer 1
Choosing a less convenient flight time or route............................... 2
Flying from an airport less easy to get to from where you live 3
Only carrying hand-luggage 4
Other (specify) 5
None of these 6

Section 5: Recent Flyers – Satisfaction with air travel experience

Q27a ASK FLYERS IN LAST 12 MONTHS (Q6 CODE 1): Thinking about this most recent flight, please indicate how satisfied or dissatisfied you were with your overall travel experience on this journey? Please record your responses on a scale of 1-5, where 1 means very dissatisfied and 5 means very satisfied.

	Select score between 1-5
Your overall travel experience on this journey	

Q27b ASK THOSE DISSATISFIED WITH ANY ASPECT (Q27a CODES 1-2): Why did you give this rating your overall travel experience on this journey? OPEN-ENDED QUESTION.

Q28a ASK FLYERS IN LAST 12 MONTHS (Q6 CODE 1): During this most recent journey, did you experience a significant delay (i.e.1 hour or more) or flight cancellation on your outbound flight from the UK? SINGLE CODE ONLY.

Yes, delay 1
Yes, fight cancellation 2
No 3
Can't remember 4

Q28b IF EXPERIENCED SIGNIFICANT DELAY OR CANCELLATION FROM DEPARTURE FROM UK AIRPORT (Q28a CODES 1&2): How satisfied or dissatisfied were you with the following aspects of how this was handled. Please record your responses on a scale of 1-5 where 1 means very dissatisfied and 5 means very satisfied.

		Select score between 1-5	Not applicable
I.	The information and updates provided to passengers on the situation		
II.	The arrangements made to assist passengers such as providing food vouchers, accommodation and alternative travel arrangements if relevant		

Section 6: PRM specific questions

Q29a ASK ALL PRM WHO WERE FLYERS IN THE LAST 12 MONTHS (Q6 CODE 1 AND Q11a CODES 1&2, Q17a 1& 2 OR Q17b CODE 1): Did you request assistance during this journey for [your/your travel companion's disability, health condition or injury]?

Yes 1
No 2

Q29b ASK THOSE WHO REQUESTED ASSISTANCE (Q29a CODE 1): Was this requested at the time of booking the flight?

Yes 1
No 2

Q29c ASK THOSE WHO REQUESTED ASSISTANCE (Q29a CODE 1): How satisfied or dissatisfied were you with the assistance provided at various stages of this journey? Please record your responses on a scale of 1-5 where 1 means very dissatisfied and 5 means very satisfied.

		Select score between 1-5
I.	Departure from [AIRPORT MENTIONED IN Q18a]	
II.	During the flight on your outbound journey	
III.	Arrival at your travel destination airport	
IV.	Returning from your travel destination airport	
V.	During the flight on your return journey	
VI.	Arrival back to the UK	

Q30 ASK ALL PRM INCLUDING NON-RECENT FLYERS (Q6 CODES 1-4 AND Q11a CODES 1&2, Q17a CODES 1-2 OR Q17b CODE 1): To what extent do you agree or disagree with the following statements about how your assistance needs will be dealt with if and when you next choose to fly? CODES - AGREE STRONGLY, AGREE, NEITHER AGREE NOR DISAGREE, DISAGREE, DISAGREE STRONGLY.

		5 codes plus provision for D/K
I.	You will be given the opportunity to ask for assistance when making booking	
II.	Your assistance needs will be understood and passed on to the airport and airline	
III.	You will be given all the assistance you need during the journey	
IV.	You will be treated with dignity and respect throughout your journey	

Section 7: Information needs and consumer issues

Q31 ASK ALL EXCEPT THOSE WHO HAVE NEVER FLOWN (Q6 CODES 1-4): In general, how well informed or otherwise do you feel about the following aspects of air travel? Please record your responses on a scale of 1-5 where 1 means not at all informed and 5 means very well informed.

.

		Select score between 1-5
I.	Comparing the market and deciding on the best option for you	
II.	Knowing what to expect during a journey and how to prepare for it	
III.	Your rights as a consumer and what do if something goes wrong	

Q32 ASK ALL EXCEPT THOSE WHO HAVE NEVER FLOWN (Q6 CODES 1-4): How confident or otherwise are you in using the Internet for the following tasks related to air travel? Please record your responses on a scale of 1-5 where 1 means not at all confident and 5 means very confident.

		Select score between 1-5
I.	Comparing the market and deciding on the best option for you	
II.	Booking online	

Q33a ASK THOSE WHO HAVE FLOWN IN THE LAST 12 MONTHS (Q6 CODE 1): When making decisions about your last flight, how important or not important to you were the following sources of information? Please record your responses on a scale of 1-5 where 1 means not at all important or you did not use, and 5 means very important. Please note that while all of these sources may be useful to you as a flyer, we are interested in the information you specifically used to make decisions about your last flight. RANDOMISE LIST

		Select score between 1-5
I.	Information provided by airlines, holiday companies, or travel agents (online, by phone or in person)	
II.	Magazines, newspapers or travel guides (in print or online)	
III.	Ratings of airline performance or service quality	
IV.	Advice from family, friends or colleagues	
V.	Your own personal experience	
VI.	Information from government bodies or regulators (e.g. Foreign & Commonwealth Office, Civil Aviation Authority, International Civil Aviation Organisation)	
VII.	Other (specify)	

Q33b ASK THOSE WHO HAVE MENTIONED RATINGS OF AIRLINE PERFORMANCE OR SERVICE QUALITY (Q33a Code IV): What specific airline rating sources did you use?

Q34 ASK THOSE WHO HAVE FLOWN IN THE LAST 12 MONTHS (Q6 CODE 1): Were there any gaps in the information you had for this journey, or anything that you wish you had known before you embarked on it?

Q35a ASK ALL EXCEPT THOSE WHO HAVE NEVER FLOWN (Q6 CODES 1-4): Have you ever made a complaint in relation to any aspect of air travel?

Yes 1
No 2

Q35b ASK THOSE WHO HAVE COMPLAINED (Q35a CODE 1): What was the reason for this complaint? If made more than one complaint, please indicate reason for most recent complaint. MULTI-CODE ALLOWED.

Flight delay 1
Flight cancellation 2
Missed flight/connection 3
Denied boarding 4

Lost luggage 5
Poor customer service/rude staff 6
PRM ONLY – lack of access or assistance at the airport 6
PRM ONLY – lack of access or assistance onboard the plane 7
Other (specify) 8

Q35c ASK THOSE WHO HAVE COMPLAINED (Q35a CODE 1): Who did you complain to? If made more than one complaint, please indicate you complained to most recently. MULTI-CODE ALLOWED.

Airport 1
Airline 2
Holiday company 3
Travel insurance company 4
Civil Aviation Authority 5
Other (specify) 6

Q35d ASK THOSE WHO HAVE COMPLAINED (Q35a CODE 1): How satisfied or otherwise were you with how this complaint was handled? Please record your responses on a score of 1-5, where 1 means not at all satisfied and 5 means very satisfied.

	Select score between 1-5
Satisfaction with complaint handling	

Q36a ASK ALL EXCEPT THOSE WHO HAVE NEVER FLOWN: When you buy a flight on its own (rather than as part of a package), the company selling it is not generally required to have insurance in case of them going out of business. This differs from buying package holidays where companies have this insurance. Do you think companies selling flights on their own should be required to be have either of the following insurance in case of them going out of business? SINGLE CODE.

To bring you home if you are overseas when it happens 1
To refund your money if you haven't left yet.................................. 2
Both of these 3
Neither of these 4
Not relevant to me – I only buy package holidays 5
Don't know 6

Q36b ASK THOSE WHO SAY YES (CODES 1 OR 2 IN Q35a): How much, if anything, would you be willing to pay for this insurance cover?

Up to [£OPEN NUMERIC] 1
Nothing 2
Don't know 3

Q37a ASK ALL EXCEPT THOSE WHO HAVE NEVER FLOWN (Q6 CODES 1-4): Sometimes the airline you choose for a flight may lease the plane you fly on and its flight crew from another airline. Would this cause you any concern, or no concern?

Yes – major concern.. 1

Yes - some concern 2
No 3

Q37b ASK THOSE CONCERNED: Why would you be concerned? OPEN ENDED.

Section 8: Attitudes to safety and security

Q38a ASK ALL/ FLYERS (Q6 CODES 1-4): To what degree do you agree or disagree with the following statements about air travel safety and security? – CODES AGREE STRONGLY, AGREE, NEITHER AGREE NOR DISAGREE, DISAGREE, DISAGREE STRONGLY. RANDOMISE LIST.

		5 codes plus provision for D/K
I.	FLYERS - I don't think much about safety when I fly	
II.	FLYERS - I am quite a nervous flyer	
III.	ALL - Safety and security standards when flying are as high as they can be	
IV.	ALL - Safety and security standards when flying are higher now than they were 4 or 5 years ago?	
V.	ALL - Flying is safer than using other forms of transport	
VI.	FLYERS – The balance between security screening and convenience to passengers is about right	
VII.	FLYERS - I worry that sometimes security screening procedures are not consistent	
VIII.	ALL - I would like to know more about air travel safety and security	

Q38b IF AGREE THAT WANT TO KNOW MORE ABOUT AIR TRAVEL SAFETY AND SECURITY (Q38a/VIII AGREE STRONGLY/AGREE): What more would you want to know about air travel safety and security? OPEN ENDED.

Q39a ASK ALL EXCEPT THOSE WHO HAVE NEVER FLOWN (Q6 CODES 1-4): Have your views on safety and security caused any change in your flying behaviour?

Yes 1
No 2

Q39b ASK THOSE WHOSE FLYING BEHAVIOUR HAS CHANGED (Q39a CODE 1): In what way has your flying behaviour changed? RANDOMISE LIST ORDER, MULTI-CODE ALLOWED.

Only fly with certain airlines 1
Avoid certain airlines 2
Avoid certain destinations 3
Avoid certain routes 4
Travel less by air 5
No longer travel by air 6
Other (specify) 7

Q40 ASK THOSE WHO HAVE NEVER FLOWN (Q6 CODE 5): Are concerns about safety or security a reason that you have never flown? If yes, is this a major or a minor reason?

Yes – major reason 1
Yes - minor reason 2
No 3

Section 9: Further demographics

And finally, some questions to help us analyse the results.

Q41 Which of these is closest to the occupation of the main income earner in your household? If that person is currently retired, please select whichever is closest to his or her former occupation.

Professional/senior managerial 1
Middle managerial 2
Junior managerial/clerical/supervisory 3
Skilled manual (with qualifications/served an apprenticeship) 4
Unskilled manual 5
Full time student 6
Unemployed/between jobs 7
Homemaker 8

Q42 Do you have any children aged under 16 living in your household?

Yes 1
No 2

Q43 Which of the following best describes your ethnic origin?

White 1
Black 2
Asian 3
Chinese 4
Mixed race 5
Other ethnicity 6
Prefer not to say 7

Thank and end.

Appendix 3 – Segmentation analysis

A3.1 Introduction

As requested, Collaborate Research conducted a segmentation analysis as an additional method of interrogating the quantitative survey data. There were three stages involved:

- Factor reduction through factor analysis of all attitudinal and behavioural questions
- Assigning respondents to the closest segment through clustering
- Profiling the resulting segments

It should be noted that this survey was not primarily designed to facilitate segmentation and the data set presented a number of additional challenges as a result:

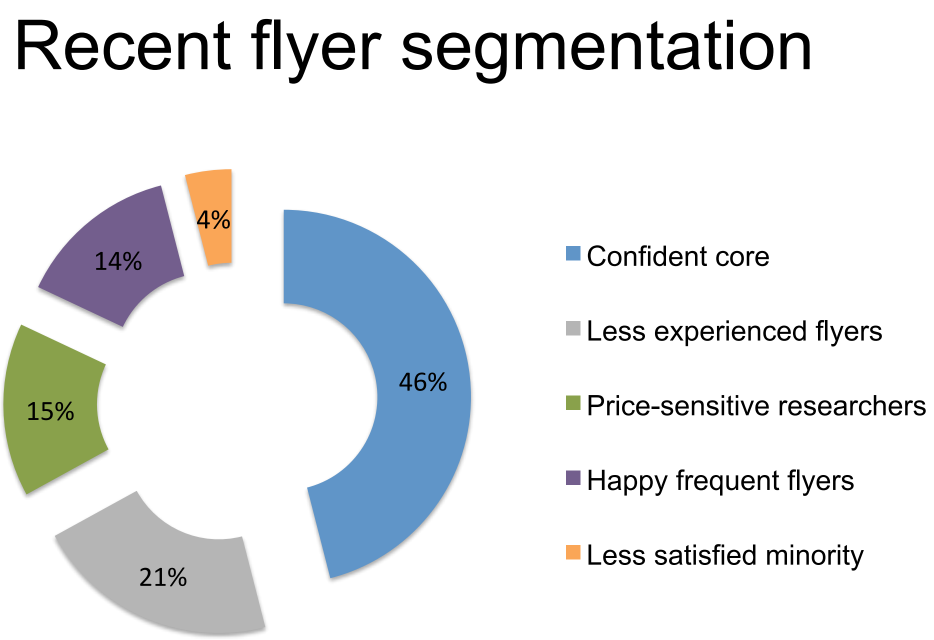
- Not all questions were asked of the whole population (the survey intentionally asked a more detailed set of questions of recent flyers and fewest questions of those who had never flown).
- The survey did not cover all possible ground with respect to the flying experience (for example, it intentionally only touched lightly on the inflight experience and had a heavy focus in other areas).
- The questions were not all asked in the same way (for a purpose-built segmentation it would be normal practice for the questionnaire to be predominantly comprised of a battery of attitudinal questions all using the same rating scale (e.g. degree of agreement/disagreement).

This made the segmentation a more complex exercise overall. For example, it required the recalibration of question scales within the modelling to allow consistent analysis of positive and negative responses. It also meant that it was necessary to run two segmentations rather than a single one – one of these was for recent flyers and the other was for non-recents (excluding those who have never flown).

If the CAA wishes to undertake a more detailed and definitive segmentation we would recommend that a purpose built study be designed. Nonetheless, we believe that this exercise provides a useful starting point and that there is significant initial insight to be gained from the findings that follow.

A3.2 Recent flyers' segmentation

A total of six distinct recent flyers' clusters were identified overall:



More detail on each of these segments is provided below:

46% of recent flyers

Confident core

Summary

- Confident and informed flyers, they tend to be highly satisfied with their flight experience

Attitudes

- Most confident group with booking and comparing the market online
- Feel informed about flying
- Are not nervous flyers

Behaviours

- Least likely to make tradeoffs to get a cheaper price
- Rely on personal experience as an information source
- Least likely to have changed behaviour due to safety fears

Demographics

- Older (59% aged 45+)
- More female (52% vs. 48% total)

21% of recent flyers

Less experienced flyers

Summary

- A group that flies less frequently and feels less informed

Attitudes

- Least well informed and confident in making decisions
- Less satisfied

Behaviours

- Least regular flyers (48% made 1 flight only in last 12 months)
- Least likely to have booked themselves

Demographics

- Slightly younger (24% under 25)

15% of recent flyers

Price-sensitive researchers

Summary

- Price-sensitive flyers who are prepared to shop around and make tradeoffs to access the best possible price

Behaviours

- More likely to be flight only bookers
- Most likely to shop around and to made tradeoffs for cheaper prices
- More likely to have changed behaviour due to safety concerns

Attitudes

- Group for whom price is most important
- Most confident online comparisons and booking
- Feel informed about flying
- Mix of nervous flyers and those unconcerned re safety

Demographics

- Younger (71% aged <45)
- More male (60% vs. 52% total)
- 45% with children at home and 39% travelled with children
- 98% have the internet at home

14% of recent flyers

Happy frequent flyers

Summary

- A group that flies frequently, considers a number of factors in their decision-making and are satisfied with their experience

Behaviours

- All booked themselves
- Frequent flyers – 36% made 3+ trips in last 12 months
- 46% booked package holidays
- Relied on range of info including personal experience

Attitudes

- Group more likely to prioritise a number of factors (e.g. airport, holiday co, flight details, price)
- Value not just cheapest price
- Highest satisfaction levels
- Confident in safety measures

Demographics

- More male (57% vs. 53% total)
- Older (56% aged 45+)

4% of recent flyers

Less satisfied minority

Summary

- A small niche of flyers who are distinct for being less satisfied due to specific experiences and needs, as well as lower engagement

Attitudes

- Less positive flying experience than others, but still only 8% dissatisfied
- Less satisfied with PRM assistance provided and least positive expectations around assistance – but more 'neutral' than negative
- Less well-informed and confident

Behaviours

- 33% experienced disruption (vs. 10% total)
- No more likely to have requested PRM assistance
- Most likely to have changed behaviour because of safety concerns (31%)

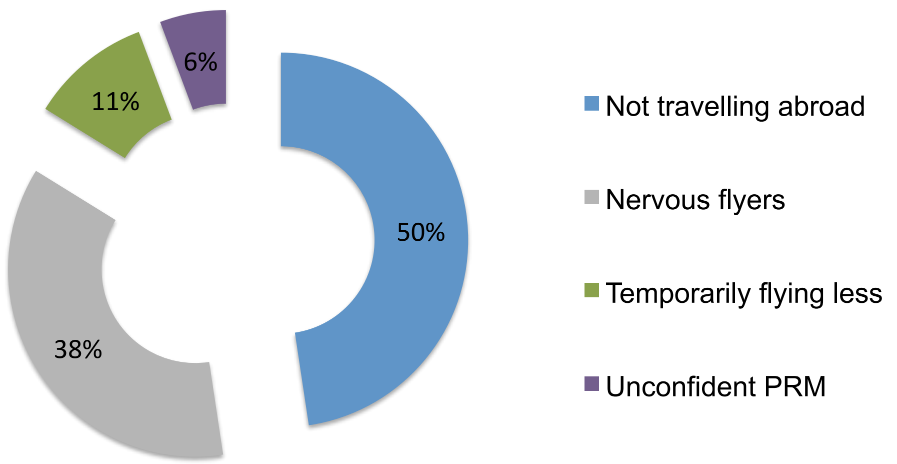
Demographics

- 69% PRM (vs. 18% total)
- Younger (50% aged <35 years)
- 51% accompanied by children

A3.3 Non-recent flyers' segmentation

Four clusters of non-recent flyers were additionally identified through a second segmentation and the charts to follow show the summary and detail of these.

Non-recent flyer segmentation



50% of non-recent flyers

Not travelling abroad

Summary

- Older people without specific access needs who are not wishing to travel abroad

Attitudes

- Informed and confident about most aspects of flying with the exception of online searching and booking

Behaviours

- Lowest level of travelling abroad using other transport (13%)
- Least likely to have changed behaviour due to safety concerns

Demographics

- Older (22% 75+ vs. 15% total)
- More likely to be without internet at home (74% vs. 84% total)
- Only 16% PRM

33% of non-recent flyers

Nervous flyers

Summary

- A group that flies least frequently and are nervous flyers

Attitudes

- 50% define themselves as 'nervous flyers'
- However, feel informed about flying and confident with respect to online booking

Behaviours

- Least regular flyers (51% just 1 trip in last 1-3 years; 34% last flew 10+ years ago)

Demographics

- More female (62% vs. 56% total)
- Slightly younger (34% aged <35 vs. 26% total)

11% of non-recent flyers

Temporarily flying less

Summary

- Group who have not flown in last 12 months but whose flying behaviour may increase in future

Attitudes

- Informed and confident about all aspects of flying measured

Behaviours

- Not particularly infrequent flyers (55% flew in last 1-3 years; 33% made 3+ flights in this time)
- 92% of PRM said access issues were a reason for not flying recently
- 44% travelled abroad using other transport in last year
- 33% expect to fly more in

Demographics

- More male (60% vs. 44% total)
- More likely to be PRM (51% vs. 26% total)

6% of non-recent flyers

Unconfident PRM

Summary

- A niche group of PRM who have not flown for a long period and lack confidence as a result of this lack of recent experience

Attitudes

- Feel less well informed and confident on most aspects of flying
- Have low expectations of PRM assistance

Behaviours

- Least recent flyers (34% last flew 10+ years ago)

Demographics

- All are PRM

Appendix 4 - Recommendations for future tracking surveys

It is common for regulators to use regular survey research to monitor changes in consumer attitudes and behaviours, particularly those that may be expected in response to their own interventions or other market developments. We recommend that the CAA considers embarking on this kind of regular tracking research and below have highlighted what we believe will be particularly useful substantive questions to retain for future surveys of this nature:

- Reasons for not flying within last 12 months (Q9)
- Whether access a reason for not flying within last 12 months (Q11b)
- Flight choice factors (Q23-26)
- Satisfaction with flight (Q27a)
- Experience of disruption (Q28) – additional questions could also be added to measure the incidence of other problems experienced during the flight
- Whether requested assistance and satisfaction with this Q29c)
- Expectations about future assistance (Q30)
- How well informed to make decisions (Q31)
- How confident using internet for travel related tasks (Q32)
- Attitudes to safety and security (Q38a)
- Impact of attitudes to safety and security on flying behaviour (Q39a/b)

In addition, we recommend keeping a range of demographic and flyer classification questions in any future survey to enable profiling of responses:

- Demographics: Location; gender; age; children at home; SEG; ethnicity
- PRM classification: Whether have access constraints – which should continue to be asked of all and not just recent flyers (Q11a – and also Q29a &b)
- Other flyer classification: Last time flew; number of trips in last 12 months/1-3 years; purpose of trip; whether a decision-maker; whether the booker; type of flight (domestic, international short, medium and long-haul); type of leisure booking (flight only vs. package); whether accompanied by children

As mentioned in Appendix 3, if the CAA wishes to undertake a future segmentation we recommend that it does so as a purpose built exercise and consolidates what is being asked into a reduced set of golden questions which are all phrased in the same way and asked of the whole population base. We would envisage that these questions would cover, as a minimum, the following themes:

Attitudes:	Behaviour:
• Being informed and confident with respect to decision-making and booking • Priorities in decision-making • Satisfaction with the flight experience • Confidence in safety and security standards	• Recency and frequency of flying • Shopping around and making trade-offs for lower prices • Changed behaviour due to safety concerns • Non-recent flyers: reasons for not flying; alternative transport; and expected future flying