CAA consumer research for the UK aviation sector - report of the qualitative stage

CAP 1304

Civil Aviation Authority

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.

Insights from this report of the qualitative stage are fed into the final research findings: CAP1303 Consumer research for the UK aviation sector – final report.

CAA consumer research

Report of the qualitative stage

Prepared for:

CAA

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Contents

1.   Executive Summary

This report relates to the qualitative phase of the consumer research, which was conducted in November 2014. Quantitative research will be conducted in December 2014 – January 2015, and a full report integrating findings from both phases of the research will be produced in early 2015.

A particular focus of the qualitative research was on exploring in detail consumers' attitudes to aviation safety and security, and if and how this affects choices and flying experiences. The research was also designed to provide evidence on two groups of interest to the Civil Aviation Authority (CAA) but of whom less is known – these include passengers with restricted mobility (PRM) and infrequent flyers. The qualitative sample therefore included recent business and leisure flyers, as well as those who have not flown within the last year, and PRM respondents.

The main findings from the qualitative phase of research are as follows:

1.1   Attitudes to safety and security

- Safety and security in air travel were not generally front of mind considerations for consumers, 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 appears 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. The public 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 their minds by information such as star ratings.

- Awareness of the CAA was low and there was little knowledge that it is the body responsible for setting and monitoring safety and security standards (even though the CAA was introduced through the lens of discussions about safety and security). Nonetheless, once the CAA's role safety and security role was introduced there was a broadly positive and supportive reaction. However, people did not want to know more about its work, believing it would not help them to make better decisions about travel and that some things are better done 'behind the scenes'.

1.2 PRM needs and experiences

- The CAA's definition of PRM includes a wide range of people and the term can feel misleading because many of those who would benefit from assistance do not have any mobility restriction per se. Many would not self-define as a PRM and several people who would qualify for assistance had not accessed it. Some were not even aware of what was available to them.

- PRM restrictions can affect more than access and/or use of airports and flying, but also often have a major bearing on choice of destinations and accommodation. In addition, even with assistance from airports and airlines, some PRMs would not be able to travel unaccompanied.

- The strongest association with assistance was wheelchair provision at the airport and help with embarking and disembarking. This tended to be requested in advance, at the point of booking, and those receive this support were generally very positive about the experience.

- However, there were reports of some variations in the nature of assistance provided between different airports. Having a choice of mobility assistance, where provided, was appreciated. Conversely, having to wait long periods could be an issue in some cases. There also appeared to be gaps in the arrangements at in some airports. For example, in some cases people mentioned not receiving assistance at the arrival airport with their baggage or to their onward transport.

- PRM's views on safety and security were in many ways consistent with those of other flyers. However, they have some specific needs in relation to security procedures which were not always met. In addition, their views on safety on-board diverged from the general public as they can face more risks on an aircraft due to their disability or health condition.

- There were some clear information requests from PRM consumers. Current safety briefings make no reference to PRM and how they will be assisted in the event of an emergency. Some also called for information on what assistance airlines and airports are obliged to provide. Those with non-physical conditions and their carers would be interested in knowing what help is available to them. Even those with no mobility-related

needs would appreciate being able to notify the airport and airline of their condition so that staff are aware and can respond appropriately and sensitively as required.

1.3   Understanding Non-recent and infrequent flyers

- There are issues with the CAA's definitions of 'infrequent' flyers – although all were non-recent (have not flown in the last 12 months), some had been frequent flyers in the past.

- Even for genuinely infrequent flyers, the experience of flying was still well recalled, and views about the experience were similar in the most part to those expressed by recent flyers.

- The reasons people have not flown recently were mainly circumstantial including health issues, economic circumstances, family changes, no need to travel abroad etc. There were also some who perceived it to a 'hassle' to travel by air and/or preferred other forms of transport.

- On the other hand, there was little evidence of barriers to travelling, whether this be safety or security concerns, access issues, concerns about the environmental impacts of flying, previous bad experiences or anything else. However, this will need to be confirmed in the quantitative survey.

2. Introduction

2.1 Background

The CAA is the UK's independent aviation regulator and, across all of its remit, the CAA has a duty to make consumer interests the focus of its work. As such, it is important that the CAA:

- Develops an understanding of the behaviours, needs and concerns of consumers, including vulnerable and disadvantaged groups, and infrequent /non-flyers;

- Explores how consumers and the public make choices so that the provision of relevant information could facilitate more informed choices by consumers in the air travel market;

- Understands better how it can empower, where feasible, aviation consumers to understand and manage the risks they face when making choices based on relevant information that is available to them; and

- Focuses its activities on the areas that present the greatest risks to consumers and the outcomes they value.

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 safety and security. Finally, there is a gap in the evidence base on the views and concerns of passengers with PRM and infrequent flyers 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 needs 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 the air travel safety and security; and

- Provide insights into the views and experiences of PRM and infrequent flyers.

The qualitatative phase was particularly focused on:

- Exploring in detail consumers' perceptions of and attitudes to aviation safety and security, including how this impacts on choice and the air travel experience, and views on safety and security standards in aviation;

- Understanding infrequent flyers in more detail, including how their views about aviation compare to those of recent flyers and their reasons for not flying recently; and

- Asking PRMs about their access and usage needs, as well as about their experience of any assistance they have previously received.

2.3   Method and sample

6 group discussions with 7-8 people in each, 8 face-to-face individual interviews and 6 telephone interviews were conducted between 13th and 20th November 2014. The research was conducted in London, Manchester and Bristol. More detail on the method and sample breakdowns is provided below:

6 x telephone depth interviews with infrequent flyers	8 x in-home depth interviews people with restricted mobility*
3 x have flown in past 1-3 years but not in past 12 months	4 x recent flyers
3 x have flown more than 3 years ago	4 x infrequent flyers

6 x Group Discussions

2 x business flyers	1 x aged 20-44	Central London
	1 x aged 45+	Manchester
4 x leisure flyers	1 x aged 20-44 C2D	Manchester
	1 x aged 20-44 ABC1	Bristol
	1 x aged 45+ C2D	Bristol
	1 x aged 45+ ABC1	Central London

3. Main findings

3.1 Decision-making process and considerations

3.1.1 Air travel choices as part of an overall trip decision-making process

While for some people, choosing a flight was an important decision, it is important to recognise that 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/consideration.

"We booked the whole trek and trip through Exodus. So actually the flight choice didn't come into it because if you were going on the trek on that day you were going to fly on this day so… we had no choice really." (Leisure traveller, 20-44, ABC1, Bristol)

Leisure travellers were sometimes more interested in the 'holiday' than the air travel experience (e.g. hotel, star rating, trip advisor reviews etc. may be more important than airline/flight choice).

"What I would want to know is, is it good for kids? Or am I going to turn up there and they go 'mum there's nothing to do here'" (Leisure traveller, 20-44, C2D, Manchester)

"I want to make sure it's warm, especially when you're booking in September" (Leisure traveller, 45+, ABC1, London)

For some business travellers short-haul flights were seen as 'part of the commute' and therefore the booking process could become routine and habitual.

"It's just another commute. It's part of your commuting journey" (Business traveller, 45+, Manchester)

Flight choice tended to assume greater importance where people had specific needs (e.g. PRM, young family) or where the flight was longer or more complex and therefore a more substantial part of the holiday experience.

"A few years ago I did Cyprus by Easyjet and it was a really long flight actually. I think it was about 4-4.5 hours and it was the most boring flight of my life because it's not comfortable for that long. And there's nothing to do. There was no telly, no food. I wouldn't fly Easyjet for that kind of flight again" (Leisure traveller, 20-44, ABC1, Bristol)

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, as will be explored below.

3.1.2 Differences in market comparisons

The types of tools used to compare the market and the extent to which people fully uncovered market availability varied considerably.

Some people reported conducting full and varied searches, including visiting high street and

online travel agents, using online comparison sites such as Sky Scanner and Go Compare etc. 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.

Some limited their search to airlines that they perceived to be 'cheaper' (generally Easyjet and Ryanair) without comparing prices with other airlines, and then made trade-offs in terms of the departure day, time and/or airport in order to secure the cheapest flight. Some limited their search to 'premium' airlines that they perceived to provide quality of service and reliability they were looking for (especially in relation to business travel and long-haul destinations). Others limited their search to a single trusted operator, such as Thomson's, and then looked for prices/dates/departure airports/destinations/flight times/hotels etc. within the operator's offer.

Some business travellers delegated initial searches to other staff or external intermediaries, then choosing from an edited selection according to flight times, preferred airline (including consideration of air miles, on-board and lounge facilities for business class in some cases) or price. Other business travellers booked the same flight each time, only entering into an extended decision-making process where the price was unusually high or the flight unavailable.

"The secretary will look it all up. She'll ask me what's the price. It's the times for me. Usually she'll give me two different airlines, different prices" (Business traveller, 45+, Manchester)

Some leisure travellers preferred to delegate the 'choice' process to trusted intermediaries such as local travel agents. This was generally in order to avoid the 'hassle' of weighing up different options and combinations. It also took out the anxiety of having potentially missed out important details such as transfers, luggage allowances etc. There was a belief that the travel agent would provide them with a good 'deal' especially in relation to the balance between quality and price.

"I just want somebody to give me the options and the places, prices, and then I look at them and then I go from there" (Leisure traveller, 20-44, Manchester)

"I just start doing it myself but it's too confusing all this, so I went to the shop" (Leisure traveller, 20-44, Manchester)

"If I was going somewhere that I had never been before, the knowledge of the agent is important because I haven't got a clue" (Leisure traveller, 20-44, ABC1, Bristol)

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.

*"When you do it on the internet it starts all good, then you're p***ing about, putting the dates in, you put one date in wrong and you go to the end and you go back [to the beginning] again"* (Leisure traveller, 20-44, C2D, Manchester)

"You forget about little things like getting picked up from one place to the other. Transfers." (Leisure traveller, 20-44, C2D, Manchester)

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

"With all the websites and travel agents and you sort of find a cheaper price and then you think, well, will there be a better one tomorrow, or if I look at another 10 places and make more phone calls, will I find better deals? So you never quite know if you've got the best deal" (Leisure traveller, 45+, ABC1, London)

3.1.3 Choice factors

As highlighted above, air travel decision-making was a variable and often complex process, with choices potentially influenced by a range of factors:

- **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.)

Not surprisingly, price was claimed by most to be a major consideration when discussing their recent air travel decisions. However, the way prices influenced decision-making was not always clear-cut. For example, some people did not always compare prices between airlines but could alternatively consider other trade-offs with their chosen carrier as a way of accessing cheaper prices (e.g. choosing a more indirect route, inconvenient flight time or further afield departure or arrival airport). Some were also satisfied if the price 'seemed reasonable' and did not feel the need to shop around. In addition, there was a common view that determining the best price is not a straightforward process, with a number of additional costs that need to be taken into consideration.

"To save about £30-£40 to go from another airport you sometimes think with the taxis and the drop offs you might as well just go from your local, Manchester. Time is the essence when you're away" (Leisure traveller, 20-44, C2D, Manchester)

"The next thing I look at after the price is probably the baggage allowance because we do travel very heavy. So if I've got to pay an extra £50 to get up to 30 kilos per case then that's cheaper for me to do that than pay for a cheaper flight but then get whacked with excess

baggage charges" (Leisure traveller, 20-44, ABC1, Bristol)

Flight times or routes were a priority for some people, but preferred options were not always possible to secure in which case it may need to be discarded as a consideration.

"You try and get nice flight times where you get in there nice and early where you're going and then you're going home late but that's not always possible... the last couple of times I've had to get up about 5 o'clock in the morning" (Leisure traveller, 45+, C2D, London)

"My criteria (sic) is direct flights. I only go short haul so I don't want to be stopping off anywhere. But with some of the locations I go to... it's actually quite difficult to get to direct from Manchester" (Business traveller, 45+, Manchester)

Previous experience with, and the reputation of, airlines and/or travel companies were often important, and most had some sort of consideration set. For some business flyers, the possibility of collecting air miles also contributed to airline preferences.

"For me the airline's very important, because very often you know, those budget airlines when you actually go online, you look at the price and then you go back to those better reputable airlines and you compare the price, it's better to go with those... I usually will go for British Airways rather than Easyjet, because sometimes they give more flexibility" (Leisure traveller, 45+, ABC1, London)

"I trust them [British Airways] and they've got a good reputation and they've never let me down" (Leisure traveller, 45+, ABC1, London)

"I've never had a problem with the budget airlines. I've never had delays or anything with them. I mean obviously you're cramped up... but you get your seats" (Leisure traveller, 45+, ABC1, London)

There were different priorities for long haul compared to short haul travel. For long haul trips the air travel experience tended to mean more and people were more likely to consider the quality of an airline's service, the type of plane or its on-board facilities.

"If you're flying more than 10 hours, normally I go for a bigger airline, like the aircraft A380, so you get better legroom and if you look at the map sometimes they tell you how to find that seat in the plane" (Leisure traveller, 45+, ABC1, London)

"If I was flying long haul... I'd certainly go to one of the best airlines – BA, Virgin" (Leisure traveller, 45+, C2D, Bristol)

By contrast, environmental impacts, as well as reliability and punctuality of airlines, were not mentioned by any participants as choice factors in their decision-making. In addition, safety and security did not appear to be overt considerations as will be explored below.

3.1.4 Safety and security as choice factors

There was little to no reference to safety and security as considerations in flight choices. It was only mentioned explicitly in one instance where the person had to book Ethiopian Airlines for a safari trip at the same time as the Malaysian Airlines tragedies/Ebola outbreak. While this

caused the person some concern it did not prevent her from booking.

On prompting, some said that they would now avoid certain airlines or destinations, but in most cases these exclusions were unlikely to have ever been considered options e.g. Aeroflot, West Africa. Some travellers also mentioned editing out Middle Eastern package holiday destinations (e.g. Egypt. Turkey) from their consideration set, however others had recently travelled to these locations and mentioned perceptions of risk but discounted them based on personal experience.

"I wouldn't go back to Egypt now with what's going on" (Leisure traveller, 20-44, C2D, Manchester)

"I wouldn't fly Aeroflot. They're really old cargo planes. Poor safety and the customer service is terrible" (Business traveller, 20-44, London)

3.1.5 Decision-making information sources and needs

A lot of information sourcing and booking was done online but, as mentioned before, travel agents and intermediaries were also used, particularly by older and less frequent flyers, those wanting a package holiday and some business flyers.

Previous personal experience and advice of friends and family were also seen as important sources of intelligence. In terms of specific online sources, price comparison sites were commonly used. 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.

"I looked at the reviews [on Tripadvisor] but I also specifically look for people that went with kids the same age, and then I contacted them direct... through their email" (PRM, Female, London)

"My parents flew South African Airlines and they said they were good – I'd consider them" (Infrequent flyer, Male, London)

Overall, most people felt that they had sufficient information available to them and were well equipped to make good travel choices. There was not a major appetite overall for more information. However, this is not to say that choices were always optimal because people were often making heavily edited choices based on a limited consideration set.

There were also some specific situations in which people felt less informed:

- Those travelling to new (previously not visited) destinations, more unusual trips (e.g. safaris, 'once in a lifetime' holidays, golf holidays with kit), or more complex journeys (e.g. multiple stop-offs) tended to be less confident that they had all the information they needed to avoid any pitfalls.

- Some more infrequent flyers and older travellers found the process of booking online confusing and stressful. In particular, they were anxious about 'getting something wrong' and being liable for hefty fees to correct this.

"I did get all the information but there was things like when you leave Mexico you have to

pay to leave but it was written in nothing" (Leisure traveller, 20-44, C2D, Manchester)

"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 traveller, 45+, C2D, Bristol)

"Going from Bristol to Newcastle, I know exactly where I'm going, whereas you get off in Kilimanjaro, where on earth are you going? You can't read in Swahili. That can be stressful" (Leisure traveller 20-44, ABC1, Bristol)

More generally, there was a view 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).

"The more you click on to get to the end, there's another extra cost added, so sometimes the websites they'll initially give you a fee, but then you're going through and you think, I'm going to need my luggage, because I can't go away for a week with just hand luggage, so that's an extra that is so much, so in the end it's not such a good deal that you think it's going to be" (Leisure traveller, 45+, ABC1, London)

"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 traveller, 45+, ABC1, London)

There was also perceived to be some lack of fairness in pricing, the main example cited being the differential between school holidays and term time prices.

"They should do more to stop them putting up the prices when it comes to the school holidays" (Leisure traveller, 45+, C2D, Bristol)

3.1.6 Information needs at the time of decision-making and booking

As mentioned above, most people felt they had all the information they needed to make informed decisions and did not require more information. Where people more information was sought it was generally due to a more complex travel journey – e.g. facilities at stopover airports, more information about connecting flights, or because they had been '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 traveller, 45+, ABC1, London)

"Coming back on those aircraft with no reclining seats. If I'd have known that I'd have booked a different aircraft. There was no way I'll travel on that again" (Business traveller, 45+, Manchester)

People were not looking for information about safety and security at time of booking, and nor were there any requests for information about environmental impacts, airline reliability or timeliness.

"It's never in my thought process before I book my holiday – safety" (Leisure traveller, 45+, ABC1, London)

3.2   Attitudes to, and experience of, air travel

3.2.1   Attitudes to air travel

Air travel was inextricably associated with the excitement of travel and, for most of those involved in this research, the commencement of a holiday. Even business travellers could experience some excitement when travelling long-haul or to new destinations, especially if travelling in business class.

However, travellers tended not to have very high expectations of the air travel experience itself. This is because it was associated with being processed and confined for lengthy periods, and potentially facing issues outside their control (queues, crowded conditions delays etc.).

"You're paying for what you get, aren't you, so your aspirations are not high" (Leisure traveller, 45+, ABC1, London)

"It's just a nightmare experience from start to finish. You get on the plane… and the pitch is getting smaller and smaller. So you've got to pay more and more to move further up the plane to get a bit more comfort" (Business traveller, 45+, Manchester)

Those who looked forward to flying are often expecting a better experience due to travelling in a premium class. Only a minority of those who fly economy expect to enjoy the experience end-to-end.

"I'm going to Jamaica tomorrow and I'm dead excited because I've booked the VIP lounge" (Leisure traveller, 20-44, C2D, Manchester)

A minority of travellers also reported feeling anxiety at the prospect of air travel. This could have a number of motivations:

- Business travellers could be very time-pressured and concerned about whether they would be let down/inconvenienced by delays or tired on arrival.

- PRMs could find the experience of air travel extremely uncomfortable and tiring.

- Passengers travelling with young families could have concerns about their children's behaviour and/or comfort, controlling their children and safety of children in the airport and on the flight and about whether they had remembered everything they need.

- Nervous fliers could feel apprehensive about the flight experience well in advance of boarding the plane.

- People could feel anxiety about the destination experience where they were flying somewhere new: how user-friendly the arrival airport would be, whether they would easily find onward transfer, quality of hotel and expected holiday experience etc.

"[With children] you don't know how they're going to react. I took my 2 year old last year for

the first time and he had an ear infection. I was dead scared he was going to start screaming and whinging and then you're worried about everybody else" (Leisure traveller, 20-44, C2D, Manchester)

"I'm a bit nervous at first because I think I'm going to get charged because my case weighs too much" (Leisure traveller, 20-44, C2D, Manchester)

"I get quite irritated by just wondering if I'm going to get someone who's slightly rotund next to me, or very noisy children around, so I get a bit edgy about 'is this seat going to be the right seat?'" (Leisure traveller, 20-44, C2D, Manchester)

"Business flight is just a means to an end. You know it's not going to be pleasant. You know it's going to be time consuming and time wasting but unfortunately it's just something that you have to undertake to get where you need to go" (Business traveller, 45+, Manchester)

3.2.2   Experiences of air travel

For many, the actual experience of their most recent journey met their low expectations and was found to be 'stressful' and 'exhausting'.

"It is a rollercoaster of emotions I think. I'm always exhausted whether I do a 1 or 2 hour flight, or a 10 hour flight, I feel absolutely exhausted at the end of the journey. It's a good point – then a bad point!" (Leisure traveller, 45+, ABC1, London)

Travel-related stress could commence from the time of leaving home if there were worries about the transport or arriving on time. At the airport, each of the main touch points (check-in, security, boarding, departure) could cause frustration if they were not smooth running. In addition, getting settled on-board could come with its own anxieties (e.g. will there be enough overhead luggage space, who will I be sitting next to), and there was also the anticipation of unknowns at the arrival side (e.g. what is immigration going to be like, will my bags arrive, will it be straightforward to access the onward transport).

"[The] stress of so much of flying. Just making sure you've got your tickets and you get there on time and all of that." (Leisure traveller, 45+, ABC1, London)

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.

"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 traveller, 45+, C2D, Bristol)

"I had a very early flight to New York from Heathrow Terminal 5… I was through in no time, it was City airport quality" (Business traveller, 20-44, London)

Conversely, incurring a significant problem (e.g. flight delay or cancellation, lost luggage etc.) would not surprisingly contribute heavily to a poor experience. In addition, a range of other factors could also cause inconvenience or frustration:

- Travelling to airport – e.g. transport delays, heavy traffic.

- At the airport – e.g. crowding, queues, long walks to departure gates, unhelpful or unfriendly staff, and lack of facilities for children and families.

- On-board – e.g. problems with seats, overhead luggage space, neighbouring passengers, food or entertainment.

- On arrival – issues with visas, long waits to retrieve luggage or problems with onward transport.

"We were at Luton in September and it was just crazy busy. There weren't enough seats in the waiting area for everyone. There was loads of people standing around, it was really hustly and bustly and it was like 6 in the morning, people drinking already." (Leisure traveller, 45+, ABC1, London)

"You know what's annoying? As you sit down on the plane someone in front of you, even if they're quite small, they bang their chair straight back" (Leisure traveller, 20-44, C2D, Manchester)

"The only stress I've got is how my 2 year old behaves, about how he's gonna behave on the flight and running up and down the aisles and all that" (Leisure traveller, 45+, ABC1, London)

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

"Finding your luggage, that's stressful in itself, because sometimes your luggage gets lost and it's all more stress isn't it?" (Leisure traveller, 45+, ABC1, London)

3.2.3   Information needs while embarking on the air travel journey

Despite the variability of flight and airport experiences, there was no real demand for more information related to any aspect of the journey. Signage and real-time flight information was felt to be generally good in the airport. People were often distracted and busy as they went through the airport procedures and felt they would not find time to read more information. Some people were also aware that there were a number of smartphone apps/text alerts to update them about flight delays etc. which meant they were not entirely dependent on in-situ information

"You get most of the information about your flight from your apps. So you don't even have to look at the view. You just go on your app and it tells you whether it's due, it's late, what time" (Business traveller, 45+, Manchester)

People generally felt that a 'good' flight experience often came with trial and error of previous experience – they 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.).

"I went to Ibiza in September and didn't print off my boarding pass. For two of us [it was] 170

Euros" (Leisure traveller, 20-44, C2D, Manchester)

"You learn when the queues are smaller for security – early in the morning you just sail through" (Business traveller 45+, Manchester)

3.3   Safety and security

3.3.1   Overall views

When they were prompted, it was apparent that travellers associated safety and security issues with flying more than with other forms of transport, even though many knew that it is 'statistically the safest form of travel'. Some of the reasons for this were:

- The prominence of airport security screening and on-board safety demonstrations.

- The view that any accident or incident involving a flight is likely to have catastrophic consequences.

- The high profile cases reported in the media, from 9/11 through to the two relatively recent MH flights.

- People feel that they have no control or agency in preventing these catastrophic consequences.

- A minority felt less comfortable with the concept of air travel than land or sea-based travel.

"It's just the fact that you can't get out. If there's turmoil that's it now, [I can] climb out the car window if the car goes over" (Leisure traveller, 20-44, C2D, Manchester)

"You are worried because you're up in the air and it's just not natural is it?... I always look at the luggage going on if I'm by the window and I'm thinking, how does this bloody thing stay up there?" (Leisure traveller, 45+, ABC1, London)

At the time of research, fears and concerns in relation to the two Malaysian Airlines disasters were already beginning to recede, although people mentioned avoiding Malaysian Airlines flights. However, 9/11 was still mentioned as a 'watershed' moment when taking safety and security for granted became no longer possible.

"They went through a period where there was quite a few crashes. So it makes it more prominent. [You think] what the hell's going on? But after a few months you forget" (Business traveller, 20-44, London)

"You think about it more since what we know as terrorist acts. Since the twin towers. I'd go on an aircraft and my dad would always say, 'stewardess, can my son meet the pilot?' I would go up and sit with my dad in the pilot seat at the left, and he'd say 'these are the Pyrenees' and he'd put his hat on me. Wow. You wouldn't dream of doing that now because of the security threats." (Leisure traveller, 20-44, ABC1, Bristol)

There were a variety of feelings expressed about safety and security. There were clearly some people who were inherently more nervous and fearful flyers, and others who were not as concerned about safety and security. More frequent travellers tended to be more sanguine.

"In comparison to every other travel it's safe as houses isn't it, so I don't know what you're worried about" (Leisure traveller, 45+, ABC1, London)

"I think it's very safe and secure. You only have to look at the crash record. It says how many flights take off a day around the world. You never hear one thing." (Business traveller, 45+, Manchester)

"The more you fly, the more comfortable you become" (Leisure traveller, 45+,C2D, Bristol)

There was also an aversion to thinking too deeply about the reasons for safety and security measures while flying. In-depth discussions of safety and security made many, especially nervous flyers, feel anxious and stressed. For this reason, people tried to put the reasons for the safety/security procedures out of their minds and concentrate on the processes. Most flyers would not contemplate stopping or reducing flying for safety or security reasons. As mentioned previously, there were very few mentions of avoiding airlines, destinations or routes because of safety or security fears.

"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 traveller, 45+, ABC1, London)

"It's not in the forefront of my mind, but it's always in the back of my mind. You hear stories and things and worry about, you know, if you're going to land safely. If it was in the forefront of my mind obviously I wouldn't travel. But it's in the back of my mind, you know, this nagging thing" (Leisure traveller, 45+, ABC1, London)

"I'm not the biggest fan of flying. I don't particularly like it. I'd rather not but then I'd rather go on holiday so I do it. I'm not going to not do it because there's a bit of a risk" (Leisure traveller, 20-44, ABC1, Bristol)

3.3.2 Public understanding of safety and security

Safety and security were understood to go hand in hand – in consumers' minds both security and safety measures contributed to the passenger feeling safe. However, when prompted they were also able to split out the two concepts, the prevailing division being:

- Security – focused on terrorism, takes place in the airport
- Safety – focused on accidents, takes place on/concerning the plane

"Safety, like the age of the plane, the parts, the checks. Security is the people who want to harm you" (Business traveller, 45+, Manchester)

Safety was additionally thought to have a wider remit than 'accidental harm'. Participants included in the definition:

- protection from drunk or unruly passengers whilst in air;

- being taken ill while on the plane;

- deep vein thrombosis; and

- health and safety issues such as food hygiene and tripping hazards.

"I think for me, safety is actually where there's no intent to cause trouble, so if you've got a drunk person running around on the plane, it's not that he's deliberately trying to do it, he's just not in control" (Leisure traveller, 45+, ABC1, London)

In addition, several people thought that 'accidental harm' was relatively unlikely in comparison with harm caused through negligence or neglect e.g. drunk pilots or aircraft not being correctly maintained.

"Safety is to make sure everything's in place. Nothing can fall out. Nothing can make you trip up, everything is secure. Security is to make sure you don't let undesirables on board. People that drink, if they've drank a little bit, double check to make sure they are okay to come on the plane." (PRM, London, Female)

Security could also have the additional meaning of border security, involving issues such as immigration and the import of dangerous foodstuffs or plants. There was some awareness of potential measures to prevent Ebola transmission via air travel and this was generally thought to be an additional security measure.

Other non-passenger facing activities (e.g. air traffic control, pilot certification, decisions on runway use in extreme weather conditions) were not top of mind with respect to their role in maintaining safety or security. However, when prompted these were accepted to be important.

3.3.3   Perceptions of safety and security

As mentioned, the main touch-points when passengers were made aware of these issues were at the time of security screening and safety demonstrations.

The UK was generally believed to have high safety and security standards. This was partly because we are perceived to do things 'by the book' and partly because the UK is acknowledged as a under high threat of terrorist activity.

"It's got to be safe because health and safety and security laws are just so tight that there's no issues" (Leisure traveller, 45+, ABC1, London)

"I think the British regulations are very good. It's after so many hours they have to go in for servicing and I'm happy with that." (Business traveller, 45+, Manchester)

People did not think that there were any differences in standards or oversight for departing compared to arriving or over-flying air traffic, and there were suggestions that this being the case might cause some concern. People naturally expected some countries to be more 'relaxed' in relation to security (e.g. Greece, Spain) because they are not under the same level of threat as the UK. However there is also some disapproval of this approach to security (e.g. because one could be departing from a low risk country back to a high risk one). The USA was cited as

particularly strong on security, which many approved of but some felt was potentially going 'too far' in the suspicious attitude of security staff towards travellers.

"Places like America… they're fine, but the third world countries like Tunisia and that lot, they are lax." (PRM, Female, London)

"There's no point in this country looking out for this particular type of things and that country looking out for that. The bottom line is a person, if they're a threat they're a threat, no matter which way. So you need to look at all angles and make it consistent." (PRM, Female, London)

"When I went to Cork… we basically walked past passport control, there was no one there… it was like, should we even walk through?" (Leisure Traveller, 20-44, C2D, Manchester)

There was a belief that there is international co-operation in relation to safety and security standards and radar tracking. There was some awareness that there are radar 'black spots' due to the disappearance of Malaysian Airlines flight MH370 and some found this inexplicable and unacceptable given the worldwide coverage of imaging satellites and other technologies.

"With the technology they've got in the world these days, to have black spots with the amount of satellites they've got circling the earth – not to be able to find out about that plane that went down in Malaysia – disgusting that" (Leisure traveller, 20-44, C2D, Manchester)

However, overall there was a general view that 'it is as safe and secure as it can be', particularly when flying from the UK.

3.3.4   Atttitudes to security in more detail

Security procedures featured prominently in people's recollection of their airport experiences and this part of the experience could have a significant bearing on whether the overall experience was positive or negative.

"Queuing at security. I hate it. Never enough security stations open. You always end up queuing for ages…That's my bugbear" (Business traveller, 45+, Manchester)

Security was mostly associated with going through metal detectors and passport control. A few also thought about in-hold luggage checks and a small minority mentioned 'behind the scenes' processes such as electronic passenger screening (e.g. credit card details, background checks etc.).

Whilst waiting to go through security people reported a heightened awareness of security concerns – e.g. judging other passengers, feeling inexplicably guilty themselves (although this tended to dissipate once security had been cleared). The process of removing shoes and belts, going through metal detectors was, however, a reassuring and calming ritual. Some of the most important elements of reassurance included professional and vigilant looking staff.

"At the passport bit I was queuing up and looking. I'm going to beep now and the person in front of you beeps, what have they got on them?" (Leisure traveller, 20-44, C2D, Manchester)

"It does make you a bit nervous, taking your shoes and socks off and everyone's laughing. It's embarrassing but I do understand why they've got to do it, but you think what on earth do you think I've got?" (Leisure traveller, 20-44, C2D, Manchester)

There was very little challenge of the need for the procedures to take place – participants felt that they would do whatever was necessary to keep themselves safe. They trusted that the security procedures were necessary to deter threat (although they could provide a reasonable explanation of the reason for the measures when called to, they did not routinely reflect on these reasons).They understood the nature of that threat to be terrorism.

"I think it's good. I know it's frustrating but it's just for the sake of what goes on in the world now" (Leisure traveller, 20-44, C2D, Manchester)

"I support it completely, I think it's a really good thing" (Infrequent flyer, female, Manchester)

"We moaned about queuing at security but the fact that it is so visible is a pain but it's also quite reassuring that they are so vigilant" (Business traveller, 45+,Manchester)

There was some inconsistency perceived in current security processes, particularly between countries but sometimes even in the same airport (due to differences in approaches by individual staff). Most could not see any legitimate reason for this and would prefer greater consistency for more peace of mind.

"[Security procedures give you] peace of mind, definitely. You just don't want that thought running round… Some lunatic being in the queue. At least they can be eliminated before you get into that zone." (Leisure traveller, 20-44,C2D, Manchester)

"Some airports you take your belt off, some you don't. Sometimes you get asked to take your shoes off, sometimes they don't. I'm not sure why" (Business traveller, 20-44, London)

People expressed concerns where they felt that staff had been too 'lackadaisical', the procedures had not been properly followed, or where they found a liquid or other prohibited item in their luggage which had escaped security checks. They also disliked staff who treated them in an offhand manner or who were disrespectful – there is a fine line between a professional manner that inspires confidence and rudeness/causing offence.

"Some of the workers at the airport, they feel they've got that control and I think some of them actually do go over the top and with rudeness as well." (Leisure traveller, 45+, C2D, Bristol)

"Sometimes it's just the attitude of the staff in the airport. They don't seem professional enough for me. If you've not done anything wrong I don't mind if one's dead stern and going through every item of clothing I've got" (Infrequent flyer, female, Manchester)

A small minority of people (including one member of an ethnic minority) felt that there was sometimes ethnic stereotyping and different behaviour towards people from certain ethnic minorities. This was felt to be particularly true in the USA, but also to be possible in the UK.

"I think certain people… actually kind of get stopped a lot more than other people. I have a Muslim friend I often travel with, who does look like your stereotypical terrorist, I admit that,

but he's always stopped every time. It annoys me… if you're going to send a terrorist it's going to be a little old lady isn't it, it's not going to be someone who looks like one" (Leisure traveller, 45+, ABC1, London)

"There's a slight difference for me going to the States. They really are racist in terms of the whole Al Quaida thing now. You are automatically regarded almost as a terrorist so you'll see the black males get picked out" (Business traveller, 45+, Manchester)

The presence of armed security officers was polarising – some felt less safe, while others felt safer and some had conflicting feelings. In unfamiliar foreign countries people were likely to notice and be least comfortable with armed security officers, while they were not often noticed in familiar or UK airports.

"November last year I went to Egypt and there were guys there with AK47 machine guns and rifles and they looked well used. I don't know if I felt safer" (Leisure traveller, 20-44, ABC1, Bristol)

People undeniably felt security processes to be boring, long-winded and to involve an element of hassle (removing clothing, sorting liquids, bag searches etc.). This was particularly true for PRMs and people travelling with small children. However, they tended to blame delays on other passengers 'taking a long time' or on lack of adequate staffing rather than the processes themselves.

"I don't mind it, unless there's a really long queue or something. I think recently they went through all my hand luggage at the other end of security and I had to stand there and wait and wait and wait and that was well… It was just a bit of a pain really hanging around" (Leisure traveller, 45+, ABC1, London)

"Half the delays are people who know what they've got to do, know they've got to take their belt off. They know they've got to remove their phone, they know they've got to take their laptop out. And then they'll get there and they'll stop and have to do it all. Half the delay is because of someone else" (Business traveller, 45+, Manchester)

People expected that there would be additional security processes as terrorists developed new methods of attack. They found it very difficult to articulate when the security procedures would be 'too much' – although one participant felt that measures affecting bodily integrity (e.g. blood tests, routine strip searches) would be a step too far.

"I think they still have to do more things. You see where they've figured out someone's tried to take this on a plane… I'm expecting it to change" (Leisure traveller, 20-44, C2D, Manchester

Therefore, being subjected to more time-consuming procedures and inconvenience would be acceptable to most (as long as this was for more stringent procedures and not due to under-staffing). However, the concept of paying more caused confusion (e.g. would it be compulsory or discretionary?) and people could not engage with this in the abstract.

"If they needed to do [something new], surely they should just do it, if there's a good reason to do it. It should be a matter of fact, we shouldn't have to pay extra for it" (Leisure traveller,

45+, ABC1, London)

There was also active support for any measures that could maintain security while reducing the burden on passengers, particularly in terms of queuing time and the hassle of removing clothing etc.

"Only some airports do it, but why can't you walk through, stand in it, it scans you and… they can see everything. That's all they've got to do, you don't have to take your shoes off" (Business traveller, 20-44, ABC1, Bristol)

3.3.5   Awareness of security restrictions

There was widespread awareness of the liquid restrictions but limited awareness of the lithium battery restrictions. In fact, people did not understand what lithium batteries are or where they might be found. They assumed that this related to alkaline/non-rechargeable batteries for personal electronics which are not commonly used any more in most devices.

"You don't need them… why would you take a battery through?" (Leisure traveller, 20-44, C2D, Manchester)

There was also some spontaneous awareness and mention of the need to ensure electronic devices were charged.

The main concerns that people had about these additional restrictions centred on the liquid restrictions and were more around being made to pay for plastic bags at airports or not being able to use your own transparent bag rather than due to the need to limit liquids. However, most people felt that the rules were clear and easy to follow.

"If you stick to the rules, I think you're pretty much there. You have to have this size bag, you're only allowed 10 x 100 ml bottles with liquid in. it's very clearly laid out… If you do it right and don't try to get through with the best perfumes and then complain because you have it taken off you and you don't get it back again. If you stick to it you're going to get it right" (Leisure traveller, 20-44, ABC1, Bristol)

3.3.6   Attitudes to safety in more detail

When prompted 'safety' was mainly experienced through the safety briefing when passengers are seated on the airplane. Although this was the principal reminder of safety, it was not generally given much focus largely because it had become part of the routine but also because many doubted that the safety procedures outlined would have any effect in the case of an emergency mid-flight. Instead there was an implicit assumption that everything possible being done to ensure safety and prevent any accident including that all planes are regularly serviced and maintained, and that the flight crew are well trained.

"When you actually get on the plane and they tell you about the lifejackets, you expect that on any flight. And I do pay attention to it, and I do read the card. But other than that I don't really think about it" (Infrequent flyer, female, Manchester)

Factors that could enhance a feeling of being safe include: larger planes; certain positions on

the plane (e.g. over the wing, near an emergency exit); strict screening; clean and modern planes; functioning seat trays, recliners and lighting; and smooth running services with no suggestions of technical problems. Perceptions of safety could also be enhanced in business class and premium economy because the cabins have more room, there are fewer people in the space and the whole experience is more controlled, calm and positive.

"It sounds really crazy but I actually feel more secure sitting in a business class seat than I do in an economy seat. It's really bizarre. I think in economy you're more closed in and squeezed in and the seats aren't comfortable" (Business traveller, 20-44, London)

"I always heard the wing was the safest place to be. I always book a seat there" (Business traveller, 20-44, London)

Factors that negatively impact on feelings of safety include: dirty planes, old planes, very small planes that are noisier and where turbulence is felt more strongly, delays due to technical problems on the plane, difficult take offs or landings. People feel least safe at take-off and landing and during periods of turbulence and most safe during the flight when distracted by in-flight entertainment or other routine activity.

"I always say my prayers before the plane goes off" (PRM, London, Female)

"Scandinavian Airlines, the plane was tiny, I've never been on a plane so small. I was worried a bit all the way, even though it was a short flight" (Leisure traveller, 20-44, C2D, Manchester)

"I only think about it when the plane dips or something" (Leisure traveller, 45+, ABC1, London)

"I get really anxious flying to the Isle of Man. It's usually a turbo prop so it's like going back in time" (Business traveller, 45+, Manchester)

"You could tell that last Thomson's flight was an old plane – it still had ashtrays. You clock this but you don't give too much attention to it. You just hope that is a well-maintained plane. We as passengers have to go through lots of procedures so I'm sure the plane will have to as well" (PRM, London)

Clear communication from flight crew about reasons for turbulence can help to mitigate fear. Nervous flyers look to cabin crew to reassure them about safety. When cabin crew appear calm, professional and in control the passengers in turn feel reassured and more safe.

"I hate flying actually, but the moment I get on the flight when I see the confidence of the crew – I always look at their face when there is turbulence and then they are very calm and I think it's okay" (Leisure traveller, 45+, ABC1, London)

Nervous flyers also often employ self-distraction techniques at key moments in the flight to control their fears.

However, for all passengers anxieties and concerns tend to be quickly forgotten once the plane has landed safely and people then look forward to their onward travel and/or holiday experience.

"I think the anxieties are before the flight and the flight lands and you start thinking about

getting out of the airport with the children" (Leisure traveller 20-44, ABC1, Bristol)

Confidence in safety standards came down to trust because people had no clear idea what safety standards are or how they are maintained. There was very little interest in finding out more about the safety regime as people felt it could reduce the perception of safety rather than increasing it by making people focus on the issue of safety and scrutinise safety procedures in a way that could undermine trust. As a result, it is a reasonable conclusion that consumers are unlikely to feel empowered by finding out more about safety procedures because safety still feels ultimately out of their control and not something they could reliably make an informed decision about. Nervous flyers in particular could become quite distressed at the idea of being forced to engage with risk and safety in detail in relation to air travel.

> *"I'm not going to ask that question. I'm assuming it's regulated, I'm not going to check it out [myself], has the plane passed its MOT?"* (Leisure traveller, 20-44, C2D, Manchester)

People assumed that there are consistent safety standards across all airlines departing from or flying to the UK and did not expect that the price they pay should have any direct correlation with safety. That said, there was a lot of post-hoc justification of choices in the discussion of safety. For example, those who chose premium airlines justified their choice in relation to safety (once prompted) by pointing out perceptions of greater competence – "a safe pair of hands", while those who choose budget airlines justified their choice by saying that they felt budget providers have too much to lose in the case of a crash. Those who chose less well known airlines, such as Norwegian Air or Jet Airlines, could also justify their choice by pointing out that they have very new fleets and therefore these planes were likely to be very safe.

> *"It would be absolutely ridiculous for them not to do the checks. They'd lose so much money. Bankrupt the airline"* (Leisure traveller, 20-44, C2D, Manchester)

> *"I've flown BA and Easyjet and on the flights that I've taken there was no perceptible difference"* (Business traveller, 45+, Manchester)

There was little safety concern or interest in the fact that airlines may lease from foreign companies or not manage their own fleet. They 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 traveller, 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 traveller, 45+, ABC1, London)

3.3.7   Views on safety-related information

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 traveller, 20-44, C2D, Manchester)

"I think we're sort of bombarded with so much information all the time, it's just like, oh dear… just not interested"

There was a view 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 traveller, 45+, Manchester)

When prompted with specific ideas, 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 traveller, 20-44, ABC1, Bristol)

"I like to know stuff like that. If I end up getting stuck in the middle of Mozambique and thinking they've got these planes that fly internal that are absolutely garbage… me knowing that now I'm not going to book" (Leisure traveller, 20-44, C2D, Manchester)

"I remember when I was younger, going to Africa, and I was like… there's no way I'm going Africa Airlines, or anything like that, because I just have this feeling they're not checking their planes as well as BA are… but it's probably rubbish" (Leisure traveller, 45+, ABC1, London)

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 of people 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 traveller, 20-44, C2D, Manchester)

"I don't really care whether it's a 9 or a 10. If it's a 4 against a 10 that would make a difference" (Leisure traveller, 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 traveller, 20-44, ABC1, Bristol)

3.4 Infrequent/non recent flyers

3.4.1 Infrequent flyer terminology

We discovered some issues with the CAA's definition of 'infrequent' flyers – although all involved in the qualitative research were not recent flyers (they had last flown either 1-3 years ago or more than 3 years ago), some had previously flown quite frequently but just not recently.

"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)

3.4.2 How views compare to recent flyers

For those who were actual 'infrequent' flyers, the flight experience was nonetheless often clearly remembered because it was a rare and notable experience in their past. People who had flown more than 1 year ago often recalled their airport and flight experiences clearly but were less likely to recall the decision-making process. The views of both non-recent and infrequent flyers about their most recent flight experience tended to be very similar to that of recent flyers.

3.4.3 Reasons for not flying

The reasons why participants had not flown recently were many, varied and often due to a combination of personal circumstances including health issues; economic circumstances; family changes; 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.

"I'm not that bothered about the sun. I'm not a sun worshipper. I like the countryside and the UK does have some of the most beautiful countryside and that's my kind of getaway really" (Infrequent flyer, Manchester)

"I'm very active and I hate sitting down for that long. I'm not the least bit afraid, I just get so bored" (Infrequent flyer, Manchester)

"I don't really enjoy travelling too much because I've got a health issue which I've had for 4

years now" (Infrequent flyer, London)

"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, Male, London)

Safety and security concerns did not appear to be a barrier to air travel for most. Nor did there appear to be other overt barriers to travelling by air such as concerns about the environmental impact of aviation, access issues for PRMs or a bad experience during a previous air travel journey. However, is important to note that this was a relatively small qualitative sample from which we intentionally excluded people from the qualitative sample who had never flown or air travel rejecters. In a representative sample of the population barriers, including safety and security concerns, may factor more prominently as will be established in the quantitative stage.

3.5   PRM experiences and views

3.5.1   PRM terminology

The CAA's definition of PRM includes a wide range of people and the term can feel misleading because many of those who would benefit from assistance do not have any mobility restriction per se.   Not all of those included in the research 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)

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. This could potentially be a barrier to air travel – one infrequent traveller did not travel because of her mobility restriction but would never think to ask for help or support to enable her to fly. 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)

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

Some people, including those with non-physical, temporary or fluctuating needs, would also not self-define as PRM, based on the current definition.

3.5.2   Understanding accessibility

Accessibility was not just seen to be about airports. Many of the potential barriers and anxieties to air travel for PRMs relate to the flight itself as much as the airport experience. PRMs 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 PRMs has a substantial bearing on their satisfaction with their experience.

PRMs with 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, including but 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 such as dyslexia that make navigating airports difficult.

3.5.3   Effects of mobility restrictions on choice factors

Most of those interviewed as PRMs stated that their conditions affected their choice factors in booking and choosing their flights and destinations, including:

- Those who required physical mobility assistance would often check the arrival airport facilities and would avoid airports with long distances to travel or lengthy transfers to their accommodation.

- The type of accommodation available was often a limiting factor that affected flight choice, with people choosing hotels and resorts without too many steps or too much walking and those hotels perceived to offer the best assistance during a stay.

- Some travellers could not manage the discomfort of long flights and therefore had to limit their destinations to no more than 4 hour flights.

- PRM travellers who had had a good experience of help and support on board were likely to re-book with the same tour operator or airline again.

- They were also likely to revisit the same destinations where they knew that their needs would be met, rather than 'risking' new and unfamiliar destinations.

3.5.4   Accessing help and support

Although not all of the PRMs interviewed were accessing help, those with a physical mobility restriction were more likely to be securing assistance than those with other conditions. This is because strongest association with 'help and support' at the airport was wheelchair assistance for people with physical mobility problems.

As a result, many of those with non-physical reasons for mobility restrictions were not aware that they could access help or support. They are 'getting by' without support but it is a very difficult and stressful experience and it often falls to carers to manage the stresses and strains of travel for this group of passengers.

Passengers 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.).

3.5.5 Experience of assistance

PRM assistance where received was generally requested in advance, at point of booking. Those who received such assistance were generally very positive about the experience, stating that without it they would not be able to fly.

"They were really good in Bristol. Very attentive to what you might need. Very considerate and smiley" (PRM, Bristol)

"They took the responsibility out of your hands. It was a big relief as by the time we got to San Francisco he was so tired" (PRM, Bristol)

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

"(Since having the experience of this assistance) I wouldn't hesitate to travel again as long as his health holds up. If it had been horrendous I wouldn't be attempting it again." (PRM, Bristol)

There were substantial 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 which can be very problematic for PRMs, 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)

"When you get to the airport you go to the departure lounge, you check in and then you go through passport control, so there's no assistance there. It's only after passport control" (PRM, London)

"They could have helped with my luggage. There were delays so the airport was rammed with people and there was no dispensation at all." (PRM, Bristol)

Having a choice in the type of mobility assistance was greatly appreciated, especially whether to use a wheelchair or buggy and whether to use a porter or not. PRMs often valued porter assistance, especially when they are unaccompanied by friends. On the other hand, some PRM passengers avoided using porters if accompanied by friends or family because they preferred to have greater freedom of movement within the airport prior to boarding and because they do not

want to 'cause any trouble'. One preferred a buggy where given the choice as this way her young son could sit next to her.

> *"I don't want a wheelchair, I want a buggy because I've got my son with me and he can't be walking beside a wheelchair."* (PRM, London)

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 passengers 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 PRM 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 at all, even where passengers expressed severe discomfort.

3.5.6 PRM attitudes towards safety and security

PRMs could have specific needs in relation to security procedures, which were not always met. 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. They 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.

> *"The security people, it depends on who you meet on the day. Some of them will say to you can you stand? If I need a stick to stand it's a bit difficult when they say stand"* (PRM, London)

> *"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)

In addition, their views on 'safety' in relation to air travel were often quite different to the general public, because they see many personal threats to their 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.

> *"If you're trying to get yourself in and out of seats without disrupting someone else, people can be difficult"* (PRM, London)

PRMs felt that the safety briefings on board the plane made no reference to their needs and were irrelevant to them – several expressed the concern that they would 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)

3.5.7 PRM information requirements

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)

In addition, some PRMs 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.

3.6   Role of CAA

3.6.1 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 recognition that this was 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 traveller, 20-44, C2D, Manchester)

Perceptions of the CAA are limited but where people have any familiarity at all it is 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.

"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 traveller, 20-44, ABC1, Bristol)

Only a small minority mentioned it might be responsible for safety and security when prompted

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 saw as needless.

3.6.2   Response to CAA's role and remit

The role and remit of the CAA, once described, sounds plausible and sensible. 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.

"I didn't realise they had so much jurisdiction over all the airlines in terms of making sure that staff and vehicles, planes, meet requirements. I didn't realise they had that much control over it" (Business traveller, 45+, Manchester)

"It's good that it's going on, but I don't want to know about it" (Leisure traveller, 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 potentially some latent benefit to consumers in knowing that someone was looking out for their interests.

"I think it's quite nice to know that perhaps there is somebody fighting your corner that you can turn to, like a little bit of an ombudsman. I didn't realise they were quite so involved in looking out for you as they are. So it's quite reassuring" (Leisure traveller, 20-44, ABC1, Bristol)

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 is also 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 traveller, 20-44, ABC1, Bristol)

3.6.3   Views on CAA's role in relation to PRMs

Similarly, there was no unprompted awareness of the role of the CAA in relation to PRMs but significant support, especially from PRMs themselves, for both the duty of equality of access and the role in handling complaints. PRMs 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 PRM rights and receiving complaints. Some PRMs 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 PRMs 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)

4.   Appendices

4.1   Recruitment documents

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**CAA consumer research qualitative recruitment questionnaire –
Group discussions – leisure flyers**

INTRODUCTION

Good morning/afternoon/evening. My name is _____ and I am calling from Collaborate Research, an independent research organisation. We are currently conducting research about air travel. Everything you say in the discussion will be entirely confidential. Should you take part in this research, to say thank you for your time and cover any expenses incurred we would like to offer you **£XX** in cash.

We would like to ask you some questions to see if you are eligible for the study. It will only take 5 minutes, are you interested in taking part?

Yes	1	**CONTINUE**
No	2	**CLOSE**

MARKET RESEARCH AND INDUSTRY EXCLUSIONS

ASK ALL:

Q1a   First of all, have you ever attended a market research group discussion or interview?

Yes	1	**GO TO Q1b**
No	2	**GO TO Q2**

ASK ALL:

Q1b   When was the last time you participated in a market research discussion group or

individual interview and what was it about?

DATE:	**IF WITHIN LAST 6 MONTHS THANK & CLOSE**
SUBJECT:	**IF SUBJECT IS SIMILAR TO THIS RESEARCH THANK & CLOSE**

ASK ALL:

Q2   Do you, or does any member of your immediate family or close friends, work in any of the following industries?

Advertising	1	**THANK & CLOSE**
Market research	2	**THANK & CLOSE**
Public Relations	3	**THANK & CLOSE**
Media (TV, Radio, Magazine or Newspaper)	4	**THANK & CLOSE**
Marketing	5	**THANK & CLOSE**
Emergency Services (Fire, Police, Ambulance)	6	**THANK & CLOSE**
Air travel (working in an airport, working for an airline)	7	**THANK & CLOSE**
Travel Agent	8	**THANK & CLOSE**
None of the above	9	**CONTINUE**

INITIAL DEMOGRAPHICS

FOR ALL:

Q3   RECORD GENDER (do not ask unless necessary)

Male	1	**CONTINUE**
Female	2	**CONTINUE**

REFER TO QUOTAS

ASK ALL:

Q4   How old are you?

19 or under	1	**THANK & CLOSE**
20 to 24	2	**CONTINUE**

25 to 34	3	**CONTINUE**
35 to 44	4	**CONTINUE**
45 to 54	5	**CONTINUE**
55 to 59	6	**CONTINUE**
60 to 64	7	**CONTINUE**
65 to 74	8	**CONTINUE**
75 to 84	9	**CONTINUE**
Over 85	10	**CONTINUE**
Refused	11	**THANK & CLOSE**

REFER TO QUOTAS

QUESTIONS ABOUT AIR TRAVEL

ASK ALL:

Q5   When is the last time you took a flight from a UK airport for leisure purposes? (e.g. holiday, visiting friends/relatives, other personal reason)

| 0-6 months ago | 1 | **CONTINUE** |
| 7+ months ago | 2 | **THANK & CLOSE** |

ALL PARTICIPANTS MUST HAVE FLOWN FOR LEISURE PURPOSES IN PAST 6 MONTHS

Q6   Are you solely or jointly responsible for making decisions about your air travel?

| Yes | 1 | **CONTINUE** |
| No | 2 | **THANK & CLOSE** |

ALL PARTICIPANTS MUST BE SOLE OR JOINT DECISION-MAKERS ABOUT THEIR AIR TRAVEL

Q7   How many times have you flown from a UK airport for leisure purposes over the past 12 months?

| Once | 1 | **CONTINUE** |
| 2+ | 2 | **CONTINUE** |

REFER TO QUOTAS

Q8   Over the past 12 months have you flown from a UK airport for leisure purposes with children under the age of 16 who you were responsible for?

Yes	1	**CONTINUE**
No	2	**CONTINUE**

IF YES, WRITE AGES OF CHILDREN HERE: _____

REFER TO QUOTAS

TRY TO ACHIEVE A RANGE OF AGES OF CHILDREN AMONG THOSE WHO HAVE TRAVELLED WITH CHILDREN

Q9   Thinking about your <u>most recent flight</u>, was it domestic (within the UK), short haul (Europe, North Africa) or long haul (Americas, Asia, Australasia, Southern Africa)?

Domestic	1	**CONTINUE**
Short haul	2	**CONTINUE**
Long haul	3	**CONTINUE**

OBTAIN A MIX OF DOMESTIC, SHORT HAUL AND LONG HAUL FLIGHTS

Q10   What was the reason for your most recent leisure flight?

Holiday	1	**CONTINUE**
Visiting friends or relatives	2	**CONTINUE**
Other (please write in)	3	**REFER TO RESEARCH TEAM TO CHECK WHETHER ELIGIBLE AND UNDER WHAT QUOTA**
Never	4	**CLOSE**

REFER TO QUOTAS

Q11   What is the current occupation (if retired ask what was the former occupation) of the main income earner in your household ?

WRITE IN: _____

Code socioeconomic group

A	1	**CONTINUE**
B	2	**CONTINUE**
C1	3	**CONTINUE**
C2	4	**CONTINUE**
D	5	**CONTINUE**
E	6	**CLOSE**

REFER TO QUOTA

ADDITIONAL DEMOGRAPHIC QUESTION

Q11   How would you describe your ethnic origin?

	British	1
White	Irish	2
	Any other white background	3
	Indian	4
Asian or Asian British	Pakistani	5
	Bangladeshi	6
	Any other Asian background	7
	Caribbean	8
Black or Black British	African	9
	Any other black background	10
	White & Black Caribbean	11
Mixed	White & Black African	12
	White & Asian	13
	Any other mixed background	14
Chinese		15
Other ethnic group	Write in: _____	16
Refused		17

NO QUOTAS - RECORD ONLY

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CAA consumer research qualitative recruitment questionnaire – Group discussions – business flyers

INTRODUCTION

Good morning/afternoon/evening. My name is _____ and I am calling from Collaborate Research, an independent research organisation. We are currently conducting research about air travel. Everything you say in the discussion will be entirely confidential. Should you take part in this research, to say thank you for your time and cover any expenses incurred we would like to offer you **£XX** in cash.

We would like to ask you some questions to see if you are eligible for the study. It will only take 5 minutes, are you interested in taking part?

Yes	1	**CONTINUE**
No	2	**CLOSE**

MARKET RESEARCH AND INDUSTRY EXCLUSIONS

ASK ALL:

Q1a   First of all, have you ever attended a market research group discussion or interview?

Yes	1	**GO TO Q1b**
No	2	**GO TO Q2**

ASK ALL:

Q1b   When was the last time you participated in a market research discussion group or individual interview and what was it about?

DATE:	**IF WITHIN LAST 6 MONTHS THANK & CLOSE**
SUBJECT:	**IF SUBJECT IS SIMILAR TO THIS RESEARCH THANK & CLOSE**

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ASK ALL:

Q2   Do you, or does any member of your immediate family or close friends, work in any of the following industries?

Advertising	1	**THANK & CLOSE**
Market research	2	**THANK & CLOSE**
Public Relations	3	**THANK & CLOSE**
Media (TV, Radio, Magazine or Newspaper)	4	**THANK & CLOSE**
Marketing	5	**THANK & CLOSE**
Emergency Services (Fire, Police, Ambulance)	6	**THANK & CLOSE**
Air travel (working in an airport, working for an airline)	7	**THANK & CLOSE**
Travel Agency	8	**THANK & CLOSE**
None of the above	9	**CONTINUE**

INITIAL DEMOGRAPHICS

FOR ALL:

Q3   RECORD GENDER (do not ask unless necessary)

Male	1	**CONTINUE**
Female	2	**CONTINUE**

REFER TO QUOTAS

ASK ALL:

Q4   How old are you?

19 or under	1	**THANK & CLOSE**
20 to 24	2	**CONTINUE**
25 to 34	3	**CONTINUE**
35 to 44	4	**CONTINUE**
45 to 54	5	**CONTINUE**
55 to 59	6	**CONTINUE**

60 to 64	7	**CONTINUE**
65 +	8	**CLOSE**
Refused	11	**THANK & CLOSE**

REFER TO QUOTAS

QUESTIONS ABOUT AIR TRAVEL

ASK ALL:

Q5   When is the last time you took a business flight from a UK airport?

| 0-6 months ago | 1 | **CONTINUE** |
| 7+ months ago | 2 | **THANK & CLOSE** |

ALL PARTICIPANTS MUST HAVE FLOWN IN PAST 6 MONTHS

Q6   Are you solely or jointly responsible for making decisions about any of the following aspects of your business air travel? READ OUT LIST

Airline choice	1	**CONTINUE**
Flight times or routes	2	**CONTINUE**
Departure airport	3	**CONTINUE**
None of the above	4	**THANK & CLOSE**

ALL PARTICIPANTS MUST BE SOLE OR JOINT DECISION-MAKERS ABOUT THEIR AIR TRAVEL

Q7   Thinking about your most recent flight, was it domestic (within the UK), short haul (Europe, North Africa) or long haul (Americas, Asia, Australasia, Southern Africa)?

Domestic	1	**CONTINUE**
Short haul	2	**CONTINUE**
Long haul	3	**CONTINUE**

PLEASE OBTAIN A MIX OF DOMESTIC, SHORT AND LONG HAUL FLIGHTS

ADDITIONAL DEMOGRAPHIC QUESTION

Q8   How would you describe your ethnic origin?

| White | British | 1 |

	Irish	2
	Any other white background	3
Asian or Asian British	Indian	4
	Pakistani	5
	Bangladeshi	6
	Any other Asian background	7
Black or Black British	Caribbean	8
	African	9
	Any other black background	10
Mixed	White & Black Caribbean	11
	White & Black African	12
	White & Asian	13
	Any other mixed background	14
Chinese		15
Other ethnic group	Write in: _____	16
Refused		17

NO QUOTAS - RECORD ONLY

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CAA consumer research qualitative recruitment questionnaire – Face-to-face depth interviews – people with restricted mobility (PRM)

INTRODUCTION

Good morning/afternoon/evening. My name is _____ and I am calling from Collaborate Research, an independent research organisation. We are currently conducting research about air travel. Everything you say in the discussion will be entirely confidential. Should you take part in this research, to say thank you for your time and cover any expenses incurred we would like to offer you **£XX** in cash for an interview in your home or another place nominated by you.

We would like to ask you some questions to see if you are eligible for the study. It will only take 5 minutes, are you interested in taking part?

Yes	1	**CONTINUE**
No	2	**CLOSE**

MARKET RESEARCH AND INDUSTRY EXCLUSIONS

ASK ALL:

Q1a   First of all, have you ever attended a market research group discussion or interview?

Yes	1	**GO TO Q1b**
No	2	**GO TO Q2**

ASK ALL:

Q1b   When was the last time you participated in a market research discussion group or individual interview and what was it about?

DATE:	**IF WITHIN LAST 6 MONTHS THANK & CLOSE**
SUBJECT:	**IF SUBJECT IS SIMILAR TO THIS RESEARCH THANK & CLOSE**

ASK ALL:

Q2   Do you, or does any member of your immediate family or close friends, work in any of the following industries?

Advertising	1	**THANK & CLOSE**
Market research	2	**THANK & CLOSE**
Public Relations	3	**THANK & CLOSE**
Media (TV, Radio, Magazine or Newspaper)	4	**THANK & CLOSE**
Marketing	5	**THANK & CLOSE**
Emergency Services (Fire, Police, Ambulance)	6	**THANK & CLOSE**
Air travel (working in an airport, working for an airline)	7	**THANK & CLOSE**
Travel Agent	8	**THANK & CLOSE**
None of the above	9	**CONTINUE**

INITIAL DEMOGRAPHICS

FOR ALL:

Q3   RECORD GENDER (do not ask unless necessary)

Male	1	**CONTINUE**
Female	2	**CONTINUE**

REFER TO QUOTAS

ASK ALL:

Q4   How old are you?

19 or under	1	**THANK & CLOSE**
20 to 24	2	**CONTINUE**
25 to 34	3	**CONTINUE**
35 to 44	4	**CONTINUE**
45 to 54	5	**CONTINUE**
55 to 59	6	**CONTINUE**

60 to 64	7	**CONTINUE**
65 to 74	8	**CONTINUE**
75 to 84	9	**CONTINUE**
Over 85	10	**CONTINUE**
Refused	11	**THANK & CLOSE**

TRY TO ACHIEVE A SPREAD ACROSS DEPTHS

Q5: Does the following describe you?

""I require some form of assistance, support, or adaptation in order to use an airport or travel on an airplane"

| Yes | 1 | **CONTINUE** |
| No | 2 | **THANK & CLOSE** |

Q6: What is the reason why you would require assistance, support or adaptation in order to use an airport or travel on an airplane?

WRITE IN HERE: _____

REFER TO QUOTA

QUESTIONS ABOUT AIR TRAVEL

ASK ALL:

Q5   Are you solely or jointly responsible for making decisions about your leisure travel arrangements?

| Yes | 1 | **CONTINUE** |
| No | 2 | **THANK & CLOSE** |

ALL PARTICIPANTS MUST BE SOLE OR JOINT DECISION-MAKERS ABOUT LEISURE TRAVEL

Q6   When is the last time you took a flight from a UK airport for leisure purposes? (e.g. holiday, visiting friends/relatives, other personal reason)

| Less than 12 months ago | 1 | **CONTINUE** |
| Between 1-3 years ago | 2 | **CONTINUE** |

More than 3 years ago	3	**CLOSE**
Never	4	**CLOSE**

REFER TO QUOTA

Q7   What was the reason for your leisure flight?

Holiday	1	**CONTINUE**
Visiting friends or relatives	2	**CONTINUE**
Other (please write in)	3	**REFER TO RESEARCH TEAM TO CHECK WHETHER ELIGIBLE AND UNDER WHAT QUOTA**
Never	4	**CLOSE**

Q8   What is the current occupation (or what was the former occupation if retired) of the main income earner in your household?

WRITE IN: _____

Code socioeconomic group

A	1	**CONTINUE**
B	2	**CONTINUE**
C1	3	**CONTINUE**
C2	4	**CONTINUE**
D	5	**CONTINUE**
E	6	**CLOSE**

ACHIEVE A SPREAD WHERE POSSIBLE

ADDITIONAL DEMOGRAPHIC QUESTION

Q9   How would you describe your ethnic origin?

White	British	1
	Irish	2
	Any other white background	3
Asian or Asian British	Indian	4
	Pakistani	5
	Bangladeshi	6
	Any other Asian background	7
Black or Black British	Caribbean	8
	African	9
	Any other black background	10
Mixed	White & Black Caribbean	11
	White & Black African	12
	White & Asian	13
	Any other mixed background	14
Chinese		15
Other ethnic group	Write in: _____	16
Refused		17

NO QUOTAS - RECORD ONLY

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CAA consumer research qualitative recruitment questionnaire – Telephone depth interviews – infrequent flyers

INTRODUCTION

Good morning/afternoon/evening. My name is _____ and I am calling from Collaborate Research, an independent research organisation. We are currently conducting research about air travel. Everything you say in the discussion will be entirely confidential. Should you take part in this research, to say thank you for your time and cover any expenses incurred we would like to offer you **£XX** in cash for a telephone interview.

We would like to ask you some questions to see if you are eligible for the study. It will only take 5 minutes, are you interested in taking part?

Yes	1	**CONTINUE**
No	2	**CLOSE**

MARKET RESEARCH AND INDUSTRY EXCLUSIONS

ASK ALL:

Q1a   First of all, have you ever attended a market research group discussion or interview?

Yes	1	**GO TO Q1b**
No	2	**GO TO Q2**

ASK ALL:

Q1b   When was the last time you participated in a market research discussion group or individual interview and what was it about?

DATE:	**IF WITHIN LAST 6 MONTHS THANK & CLOSE**
SUBJECT:	**IF SUBJECT IS SIMILAR TO THIS**

RESEARCH THANK & CLOSE

ASK ALL:

Q2   Do you, or does any member of your immediate family or close friends, work in any of the following industries?

Advertising	1	**THANK & CLOSE**
Market research	2	**THANK & CLOSE**
Public Relations	3	**THANK & CLOSE**
Media (TV, Radio, Magazine or Newspaper)	4	**THANK & CLOSE**
Marketing	5	**THANK & CLOSE**
Emergency Services (Fire, Police, Ambulance)	6	**THANK & CLOSE**
Air travel (working in an airport, working for an airline)	7	**THANK & CLOSE**
Travel Agent	8	**THANK & CLOSE**
None of the above	9	**CONTINUE**

INITIAL DEMOGRAPHICS

FOR ALL:

Q3   RECORD GENDER (do not ask unless necessary)

Male	1	**CONTINUE**
Female	2	**CONTINUE**

REFER TO QUOTAS

ASK ALL:

Q4   How old are you?

19 or under	1	**THANK & CLOSE**
20 to 24	2	**CONTINUE**
25 to 34	3	**CONTINUE**
35 to 44	4	**CONTINUE**
45 to 54	5	**CONTINUE**

55 to 59	6	**CONTINUE**
60 to 64	7	**CONTINUE**
65 to 74	8	**CONTINUE**
75 to 84	9	**CONTINUE**
Over 85	10	**CONTINUE**
Refused	11	**THANK & CLOSE**

TRY TO ACHIEVE A SPREAD OF AGES ACROSS DEPTHS

QUESTIONS ABOUT AIR TRAVEL

ASK ALL:

Q5   Are you solely or jointly responsible for making decisions about your leisure travel arrangements?

| Yes | 1 | **CONTINUE** |
| No | 2 | **THANK & CLOSE** |

ALL PARTICIPANTS MUST BE SOLE OR JOINT DECISION-MAKERS ABOUT LEISURE TRAVEL

Q6   When is the last time you took a flight for leisure purposes? (e.g. holiday, visiting friends/relatives, other personal reason)

Less than 12 months ago	1	**CLOSE**
Between 1-3 years ago	2	**CONTINUE**
3+ years ago	3	**CONTINUE**
Never	4	**CLOSE**

ALL PARTICIPANTS MUST NOT HAVE FLOWN IN THE PAST YEAR BUT THEY MUST HAVE SOME PREVIOUS FLYING EXPERIENCE

REFER TO QUOTAS FOR MOST RECENT FLIGHT

Q7   Why have you not flown for leisure purposes in the last 12 months? DO NOT READ – CODE RESPONDENT'S ANSWERS

| Cost/too expensive | 1 | **CLOSE IF NO OTHER REASON** |
| No need to travel | 2 | **CONTINUE** |

No time/other priorities	3	**CONTINUE**
Health issues	4	**CONTINUE**
Concerns about safety/security	5	**CONTINUE**
Environmental concerns	6	**CONTINUE**
Previous bad experience e.g. at airport or inflight (specify_____)	7	**CONTINUE**
Other (specify_____)	8	**CONTINUE**

ALL TO HAVE NOT FLOWN RECENTLY FOR REASONS OTHER THAN SOLELY COST-RELATED

Q8   Would you consider flying again in the future?

Yes	1	**CONTINUE**
No	2	**THANK & CLOSE**

NO PARTICIPANT SHOULD BE A REJECTER OF AIR TRAVEL

Q9   Have you booked or do you have any specific plans to fly in the near future (i.e. within the next 3 months)?

Yes	1	**THANK & CLOSE**
No	2	**CONTINUE**

NO PARTICIPANTS SHOULD HAVE PLANS TO FLY IN THE NEAR FUTURE

<u>ADDITIONAL DEMOGRAPHICS</u>

Q10   What is the current occupation (or if retired, what was the former occupation) of the main income earner in your household?

      WRITE IN: _____

Code socioeconomic group

A	1	**CONTINUE**
B	2	**CONTINUE**
C1	3	**CONTINUE**
C2	4	**CONTINUE**
D	5	**CONTINUE**

E	6	**CLOSE**

ACHIEVE A SPREAD WHERE POSSIBLE

Q11   How would you describe your ethnic origin?

	British	1
White	Irish	2
	Any other white background	3
	Indian	4
Asian or Asian British	Pakistani	5
	Bangladeshi	6
	Any other Asian background	7
	Caribbean	8
Black or Black British	African	9
	Any other black background	10
	White & Black Caribbean	11
	White & Black African	12
Mixed	White & Asian	13
	Any other mixed background	14
Chinese		15
Other ethnic group	Write in: _____	16
Refused		17

NO QUOTAS - RECORD ONLY

4.2   Discussion guides

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Leisure/business groups discussion guide

Introduction and warm up (10 mins)	**Introductions**
	
	• Moderator introduction
	
	    o Purpose of research to understand experiences of air travel for leisure (holiday, VFF)/business purposes
	
	    o Ground rules – not a test, no right or wrong answers, confidential, recording, one at a time, explain viewing or colleagues sitting in
	
	    o Housekeeping – refreshments, toilets, fire procedures
	
	    o Check all participants have brought their pre-task with them
	
	• Participant introductions – first name, age, occupation, family status
	
	Warm up
	
	• Word association - thoughts, feelings or visual images that they associate with 'air travel'
	
	• Discuss responses fully
	
	• Moderator to record associations on a flipchart

Mapping consumer choice/ flight journey (20 mins)	**Initial discussion of pre-task** • Ask everyone to refer to their pre-task • Go around the room asking which journey the participants had written about: trip type, who they were flying with, destination, airline and departure airport o Which moments in the process stood out? Why?

	o Is there anything you realised that you hadn't thought about before?
	o Were there any moments in the process that weren't highlighted in the task but were very important to you?
	Walking through the process
	• Ask participants to volunteer to talk about their process
	• Ask one to focus on beginning of the process, at planning and booking stage
	o Probe for what they did, how they felt and what sorts of things they were considering at the time
	o Ask other participants for similar/contrasting experiences
	• Ask others to focus on experience at departure airport, onboard and at arrival airport following the same process
	Summing up booking/flying journey
	• Moderator to flipchart key points of process and group to discuss main positive and negative moments overall
	o Probe nature of any negative feelings (frustration, annoyance, fear etc.) and reasons for these
	Discussion of parameters of choice
	• Refer back to the journey and ask for key moments when participants felt that they made choices
	o What were these choices (e.g. destination, fare type, class of travel, airline, flight times, route, departure/arrival airport?)
	o What did they feel they were choosing between?
	o What kinds of things were they taking into account? Main priorities overall?
	o Were there any places/airlines/airports they would not choose? Explore reasons
	o How much information did they feel they had? What specifically did they use/find helpful?
	o What more information, if any, they would like to have that will be useful for making their choices?
Introduction to issues of safety	• Now we are going to think about 'safety and security' in relation to air travel

and security (10 mins)	• Overall, how much or little do you tend to think about this? And at what points?
	• How top of mind was safety and security in relation to decisions you made about your air travel? Why/not?
	o Did it make any difference to your decisions – how? (Look out for mentions of, but don't prompt for - only choosing certain airlines/paying more for 'safer airline', avoiding certain airlines, avoiding certain locations or routes or travelling less by air)
	• How top of mind was safety and security when you were actually travelling? Why/not? At what points?
	• As a group reflect on any differences between importance of safety/security in decision making vs. travel experience and reasons
	• Overall, how safe/secure do you feel when travel?
	• Overall, how safe/secure do you regard air travel as being?
	o Compared to other forms of travel e.g. cars, trains, boats?
	o Any changes over time – more/less safe/secure?
	• Do you feel that the right balance has been struck between safety/security measures and interruption to passengers' journeys?
	o Do you consider the list of prohibited items to be reasonable? What do you recall these as being? Probe awareness of rules on liquids and lithium batteries
Focus on security (15 mins)	• Now we are going to focus specifically on the issue of 'security'. Do you see any difference between this and safety – if so, what?
	• Brainstorm key associations with security in relation to air travel
	o Write up on flipchart
	o Clarify, if needed, that security is primarily 'protection against deliberate attacks/counter-terrorism'
	▪ Explore responses to this definition
	• Going back to your experience can you identify any key points in your journey where security was brought to your attention?
	o When/where/how?
	o Had you thought about it before this point at all?
	o How did you feel about your experience of security?
	▪ Probe if any inconvenience and whether proportional to

	perceived threat
	• Have you noticed any differences in the level of security in different countries/airports/carriers?
	o How do you feel about this?
	o Probe perceptions of low cost airlines in relation to security
	• Overall, how satisfied were you with security measures and your experience of security? If/how could security and your experience of security be improved?
	• Do you think there is clear and sufficient information currently available to passengers on security? If not, probe fully on:
	o What more want to know
	o What are key points when they want this information
	o How they would like it communicated and by whom
	o What difference would this have made to the air travel experience they had recently
	• Would you be willing to pay more for the measures/information you mentioned?
	o Probe on financial cost and also in terms of extra time, more intrusive procedures etc.
	o For financial cost, probe what would be a reasonable additional charge per passenger for this
Focus on safety (15 mins)	• Now we are going to focus specifically on the issue of 'safety'
	• Brainstorm key associations with safety in relation to air travel
	o Write up on flipchart
	o Clarify, if needed, that safety is primarily 'reducing and avoiding the risk of accidental harm'
	▪ Explore responses to this definition
	• Going back to your experience can you identify any key points in your journey where safety was brought to your attention?
	o When/where/how?
	o Had you thought about it before this point at all?
	o How safe did you feel while travelling?
	• Have you noticed any differences in the level of safety in different

| | countries/airports/carriers?

o How do you feel about this?

o Probe perceptions of low cost airlines in relation to safety

o Probe perceptions of safety in premium airlines/airfares

o Probe whether aware that some UK airlines are maintained by an overseas company or are leased from or operated by another non-UK airline. Explore responses in relation to safety perceptions

• Overall, how satisfied were you with safety and your experience of safety? If and how could safety and your experience of safety be improved?

• Do you think there is clear and sufficient information currently available to passengers on safety? If not, probe fully on:

o What more want to know

o What are key points when they want this information

o How they would like it communicated and by whom

o What difference would this have made to the air travel experience they had recently

• Would you be willing to pay more for the measures/information you mentioned?

o Probe on financial cost and also in terms of extra time, more intrusive procedures etc.

o For financial cost, probe what would be a reasonable additional charge per passenger for this |
| Safety and security standards and the role of the CAA

(20 mins) | • What bodies do you think are responsible for safety in the UK? Probe role of each organisation mentioned

• What bodies do you think are responsible for security in the UK? Probe role of each organisation mentioned

• If not already mentioned, who is responsible for:

o Closing runways e.g. in case of fog

o Certifying pilots

o Tracking aircraft on radar (and do participants know that there are times when airlines will not be tracked – how feel about this) |

- To what extent do they think about these things? To what extent associate them with safety/security?

- Who do you think sets overall safety and security standards in the UK? How about internationally?

- How do you think the UK compares to other countries in relation to safety and security?

- Have you heard of the Civil Aviation Authority?

    o What do you think they do?

    o What role do you think they play in relation to safety and security?

    o How feel about them?

- SHOWCARD ON CAA ROLE:

    o Explain that CAA advises the government on safety and security standards, and conducts inspections

    o Potentially also explain that the CAA has different responsibilities in terms of departing/inbound/over flights

- How feel about this role – any area that you would like them to invest more (or less) effort?

- What kind of information should CAA provide to the public about safety and security?

    o What difference would this make?

- Reactions to ideas:

    o CAA promoting awareness of the EU list of non-EU airlines banned from operating in the EU due to safety concerns

    o A safety score for individual airlines (Germany provides)

- Summing up: one message to CAA about you would like them to do about safety and security

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Infrequent flyers (including infrequent PRM flyers) depth interview guide

Introduction and warm up (5 mins)	• Moderator introduction
	
	    o Purpose of the research to understand experiences of travel and also why people don't travel
	
	    o Ground rules – not a test, no right or wrong answers, confidential, recording
	
	• Participant introduction – first name, age, occupation, family status
	
	• If PRM – nature of disability or health condition
	
	• Have you been away in the last year or so?
	
	    o When? Where? Why? With whom? How get there?
	
	    o What is your biggest memory of that experience?
	
	• If no recent journey, ask them about most recent (non-air) travel experience they have undertaken – what do they remember about it

Recent journey (10 mins)	• Let's think in detail about the travel experience you just mentioned
	
	• How did you plan that trip?
	
	    o What did you do first? What did you do next?
	
	    o What information did you look for/use?
	
	        ▪ What were the main things you considered?
	
	        ▪ What kinds of transport did you consider? Why?
	
	    o Who did you talk to about it?
	
	    o How did you feel about planning the trip?
	
	    o PRM: Did you have particular assistance needs when making the booking? If so, what were these and how well were these

	met?
	• Now let's think about the journey itself, take me through what you did and what happened when you travelled
	○ What did you do first? What did you do next?
	○ What information did you look for/use?
	○ How did you feel at this point?
	○ PRM: Did you have particular needs when travelling? If so, what were these and how well were these met?
	• Looking back, is there anything you would change about that trip?
Discussion of air travel (5 mins)	• What are your general thoughts and feelings about 'air travel'? Probe fully
	• When is the last time you have travelled by air for leisure purposes?
	• What are some of the reasons you haven't flown recently? Probe beyond first response to ensure all reasons fully uncovered (look out for, but don't prompt on: cost, health/mobility issues, previous bad experience, environmental concerns, concerns about safety/security)
	• If have undertaken a different type of journey recently, did you consider air travel instead of your other travel choice? If so, why did you not choose to fly?
	• "What kind of assistance do you think you would need during the process of booking a flight and flying?"
	• "What kind of assistance do you expect would actually be provided? Would it meet your needs?" – probe if not why not etc.
	• What, if anything, would encourage you to travel by air more often? Probe fully
	• PRM: Would more/better assistance encourage you to travel by air more often? If so, what changes/improvements would encourage you to travel by air more often?
Introduction to issues of safety and security (5 mins)	• Now we are going to think about 'safety and security'
	• What are your thoughts and feelings about safety and security in relation to air travel?
	○ And what about in relation to other forms of travel – probe cars, trains, boats
	○ How safe/secure do you feel air travel is compared to other forms of travel?

	• How top of mind was safety and security for you in your last air travel experience?
	• How much of a factor was safety and security in why you have not flown recently? Probe fully
Focus on security (10 mins)	• Now we are going to focus specifically on the issue of 'security'. Do you see any difference between this and safety – if so, what?
	• Brainstorm key associations with security in relation to air travel – What? Who? When? Where? How?
	o Clarify that security is primarily 'protection against deliberate attacks/counter-terrorism measures' if needed
	▪ Explore responses to this definition
	• Do you think there are any differences in the level of security in different countries/airports/carriers?
	o How do you feel about this?
	o Probe perceptions of low cost airlines in relation to security
	• Are there any improvements you think should be made in security or in information about security in air travel? Probe fully
	o Would improvements make you more likely to fly?
	• PRM: does clearing airport security pose any particular issues or difficulties for you in relation to your mobility issue? Would improvements make you more likely to fly?
Focus on safety (10 mins)	• Now we are going to focus specifically on the issue of 'safety'
	• Brainstorm key associations with safety in relation to air travel – What? Who? When? Where? How?
	o Clarify that safety is primarily 'reducing and avoiding the risk of accidental harm' if needed
	▪ Explore responses to this definition
	• Do you think there are any differences in the level of safety in different countries/airports/carriers?
	o How do you feel about this?
	• Are there any improvements you think should be made in safety or in information about safety in air travel? Probe fully
	o Would these improvements make you more likely to fly?
	• PRM: with regard to your mobility issue, have you encountered any

	particular issues or difficulties relating to safety? Would these improvements make you more likely to fly?

Safety and security standards, the role of the CAA and overall summing up
 	
(10 mins)
	• What bodies do you think are responsible for air travel safety and security in the UK?
	
	• Who do you think sets safety and security standards in the UK? How about internationally?
	
	• How do you think the UK compares to other countries in relation to safety and security?
	
	• Have you heard of the Civil Aviation Authority?
	
	    o What do you think they do?
	
	    o What role do you think they play in relation to safety and security?
	
	    o What role do you think they play in relation to ensuring disabled people can travel by air?
	
	    o How feel about them?
	
	• Introduce role of CAA (pre-prepared SHOWCARD)
	
	    o Explore reactions to the CAA's role
	
	    o Any areas that you would like them to invest more (or less) effort?
	
	• What kind of information should CAA provide to the public about safety and security?
	
	    o What difference would this make?
	
	• What kind of information should CAA provide to the public about disability access to air travel?
	
	    o What difference would this make?
	
	• Summing up: Thinking more broadly, what would your top 3 priorities be for air travel which would make you more likely to fly in the future?

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PRM recent flyers depth interview guide

Introduction and warm up (5 mins)	• Moderator introduction
	o Purpose of research to understand experiences of air travel including for people with disabilities/mobility issues
	o Ground rules – not a test, no right or wrong answers, confidential, recording
	o Check participant has pre-task with them
	• Participant introduction – first name, age, occupation, family status, nature of disability/mobility issue
	• Warm up
	o Word association - thoughts, feelings or visual images that you associate with 'air travel'
Mapping consumer choice/ flight journey (10 mins)	• Ask participant to refer to pre-task
	• Establish nature of journey written about: trip type, who they were flying with, destination, airline and departure airport
	o Which moments in the process stood out? Why?
	o Is there anything you realised that you hadn't thought about before?
	o Were there any moments in the process that weren't highlighted in the task but were very important to you?
	• Walk through the process – focus on each stage (planning/booking, at departure airport, on board, at arrival airport)
	o Probe on what they did, how they felt and things they considered
	• Sum up main positive and negative moments overall
	o Probe nature of any negative feelings (frustration, annoyance, fear etc.) and reasons for these
	• Refer back to the journey and ask for key moments when participant felt that they made choices
	o What were these choices (e.g. destination, fare type, class of travel, airline, flight times, route, departure/arrival airport?)

	o What did they feel they were choosing between?
	o What kinds of things were they taking into account? Main priorities overall?
	o Were there any places/airlines/airports they would not choose? Explore reasons
	o How much information did they feel they had? What specifically did they use/find helpful?

Accessibility of, and assistance in, air travel (5 mins)	• If not already mentioned, probe on whether had particular needs when
	
	    o Booking? (did you request assistance when booking?)
	    o At departure airport
	    o Onboard the plane
	    o At arrival airport
	
	• If so, at each stage probe for what these needs were and how well were these met?
	
	    o Did you receive assistance when you travelled?
	    o What type of assistance? When? From whom?
	
	• Overall, how satisfied were you with the assistance provided on your last trip? Why/why not? Probe fully
	
	• If you did not receive assistance, with hindsight, would this have improved your flying experience? How?
	
	• If/what changes/improvements would improve your experience of air travel?

Introduction to issues of safety and security (5 mins)	• Now we are going to think about 'safety and security'
	
	• What are your thoughts and feelings about safety and security in relation to air travel?
	
	    o And what about in relation to other forms of travel – probe cars, trains, boats
	    o How safe/secure do you feel air travel is compared to other forms of travel?
	
	• How top of mind was safety and security for you in your last air travel experience?
	
	• How much of a factor was safety and security in why you have not flown recently? Probe fully

Focus on security
 	
(10 mins)
	• Now we are going to focus specifically on the issue of 'security'. Do you see any difference between this and safety – if so, what?
	
	• Brainstorm key associations with security in relation to air travel – What? Who? When? Where? How?
	
	    o Clarify that security is primarily 'protection against deliberate attacks/counter-terrorism measures' if needed
	
	        ▪ Explore responses to this definition
	
	• Do you think there are any differences in the level of security in different countries/airports/carriers?
	
	    o How do you feel about this?
	
	    o Probe perceptions of low cost airlines in relation to security
	
	• Are there any improvements you think should be made in security or in information about security in air travel? Probe fully
	
	    o Would improvements make you more likely to fly?
	
	• PRM: does clearing airport security pose any particular issues or difficulties for you in relation to your mobility issue? Would improvements make you more likely to fly?

Focus on safety
 	
(10 mins)
	• Now we are going to focus specifically on the issue of 'safety'
	
	• Brainstorm key associations with safety in relation to air travel – What? Who? When? Where? How?
	
	    o Clarify that safety is primarily 'reducing and avoiding the risk of accidental harm' if needed
	
	        ▪ Explore responses to this definition
	
	• Do you think there are any differences in the level of safety in different countries/airports/carriers?
	
	    o How do you feel about this?
	
	• Are there any improvements you think should be made in safety or in information about safety in air travel? Probe fully
	
	    o Would these improvements make you more likely to fly?
	
	• PRM: with regard to your mobility issue, have you encountered any particular issues or difficulties relating to safety? Would these improvements make you more likely to fly?

Safety and security	• What bodies do you think are responsible for air travel safety and security in the UK?

standards, the role of the CAA and overall summing up
 	
(10 mins)
	• Who do you think sets safety and security standards in the UK? How about internationally?
	
	• How do you think the UK compares to other countries in relation to safety and security?
	
	• Have you heard of the Civil Aviation Authority?
	
	    o What do you think they do?
	
	    o What role do you think they play in relation to safety and security?
	
	    o What role do you think they play in relation to ensuring disabled people can travel by air?
	
	    o How feel about them?
	
	• Introduce role of CAA (pre-prepared SHOWCARD)
	
	    o Explore reactions to the CAA's role
	
	    o Any areas that you would like them to invest more (or less) effort?
	
	• What kind of information should CAA provide to the public about safety and security?
	
	    o What difference would this make?
	
	• What kind of information should CAA provide to the public about disability access to air travel?
	
	    o What difference would this make?
	
	• Summing up: Thinking more broadly, what would your top 3 priorities be for air travel which would make you more likely to fly in the future?

4.3 Showcard

See overleaf

What is the CAA ?

- It's the UK's **aviation regulator**
- It works across **all aspects of aviation**: from safety, security and airspace management to the economic and environmental impacts of the aviation sector

What does it do?

- Its role is to ensure the **needs of all users are met and consumer interests are protected**, ensuring that safety and security standards are met and environmental impacts reduced
- Its specific objectives include:
    - Enhancing **aviation safety performance**
    - Ensuring that civil aviation entities operating in the UK maintain **security arrangements** which fully address the risk to their operations and to the public
    - Improving **choice, value** and the ability of consumers to make **informed decisions**
    - Improving **environmental performance** of the aviation sector

How does it fulfil its role on safety and security?

- It advises the government on setting **safety standards**
- It **inspects** and ensures that all aspects of aviation (aircraft, airlines, flight crews, aircraft maintenance engineers, air traffic controllers etc.) **meet required safety standards**
- It develops regulatory requirements and guidance to **support UK aviation security polic**y, makes recommendations to the Secretary of State for Transport about amendments to aviation security directions, and ensures that the **aviation industry follows the security requirements s**et out in UK and international law

What is the CAA's role in relation to people with mobility restrictions?

- The CAA is the body charged with enforcing European Legislation ensuring that disabled people and people with restricted movement receive **assistance from airports and airlines** so as to ensure that they receive equal access to air travel

- The CAA also provides **information and advice** to disabled people and people with restricted movement in relation to air travel and also handles individual **passenger complaints**