Civil Aviation Authority

Consumer Tracker for the Aviation Sector

Wave One, Final Report: June 2016

Ipsos Loyalty

Contents

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Background to the research

The Civil Aviation Authority (CAA) commissioned Ipsos MORI, an independent research organisation, to conduct research into UK consumers' flying behaviours and their attitudes towards aviation. This independent research, carried out in accordance with the requirements of the international quality standard for market research, will help inform the CAA's work to put consumers' interests at the heart of the way it regulates the aviation market.

The main objectives of this research are to:

- Understand flying behaviours and attitudes towards flying, including barriers for non-flyers and priorities for choosing future flights
- Understand perceptions of the aviation industry in terms of levels of safety, choice, value and fair treatment, environmental performance and security, as aligned with CAA's four strategic objectives set out in the strategic plan for 2016-21
- Measure satisfaction with the flying experience
- Understand awareness of rights in the aviation sector among UK consumers
- Compare perceptions of the aviation industry with perceptions of other sectors

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Methodology

- A total of 3,507 interviews were conducted with a nationally representative sample between 23rd February – 15th March 2016. 3,007 interviews were conducted online and 500 were conducted over the telephone.

- This mixed methodology approach was adopted to make the survey as inclusive as possible. Conducting the survey by telephone meant it was possible to capture those that are not online and conducting an online survey enabled us to interview certain groups that tend to be more difficult to reach by telephone (e.g. younger males).

- For the online interviews, participants were recruited from Ipsos' online panel. For the telephone interviews, predominantly these were conducted through a random digit dialling approach, but some targeted sample was also included.

- To ensure the sample was nationally representative, interview quotas were set to reflect the UK adult population in terms of gender, age, region and working status. Where the final number of interviews did not exactly match quotas, weighting was then applied to the final data according to these criteria.

- The questionnaire was designed to average 12 minutes online and 15 minutes by telephone. To keep the telephone interview length to a minimum, some questions were only asked on the online survey and not the telephone survey. This is highlighted in this report where this is the case.

- This research has been conducted in accordance with Ipsos MORI's standards and accreditations (see the appendix to this report).

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Analysis

- A large sample size was used overall for this study to allow for sub-analysis by key groups.   Key subgroups in the report are:
  - **Recent flyers,** defined as those who have flown within the 12 months before the research (unless otherwise stated).
  - **PRM (Persons of Reduced Mobility),** defined as those who have a disability or health condition that limits their day to day activity.
    - Physical condition; something that affects your movement, balance, vision or hearing etc.
    - Non-physical; something that affects your thinking, remembering, learning, communication, mental health or social relationships.
- Throughout this report only differences that are statistically significant to the 95% confidence level have been commented upon. If a result is statistically significant if it is unlikely to have occurred by chance and it simply means there is statistical evidence of a difference between two figures; it does not mean the difference is necessarily large, important or significant in the common meaning of the word.
- As part of the online survey, a relative importance exercise ('max diff') was conducted to identify travellers' priorities during the flight booking stage. For this exercise, participants were each presented with a number of screens showing different aspects and asked to select (from each presented list) the aspect of most importance and the aspect of least importance. At the analysis stage, the max diff approach allows us to estimate a utility of each item for the participant, and we can aggregate these utilities up to gain an understanding about the item hierarchy across a large number of participants or respondent types (e.g. different segments or markets).
- Key driver analysis (a logistic regression analysis) has also been applied at the analysis stage to assess and identify the impact of aspects of the flight experience on overall satisfaction with the flight. This analysis looks at the relationship between different measures within the survey.

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Weighting scheme

Quotas were set on the survey, based on 2011 UK Census information. At the analysis stage, small scale weighting was applied to the overall sample to address any small discrepancies in the achievement of the quotas.

Category	Sub-category	Weighted proportion	Unweighted proportion
Gender	Male	49%	49%
	Female	51%	51%
Age	18 – 24	12%	11%
	25 – 34	17%	17%
	35 – 44	18%	18%
	45 – 54	18%	18%
	55 – 64	15%	16%
	65 +	21%	21%
Working status	Working Full Time	41%	43%
	Working Part Time	17%	16%
	Not Working	42%	41%

Category	Sub-category	Weighted proportion	Unweighted proportion
Region	North East	4%	4%
	Yorkshire & Humber	8%	8%
	North West	11%	11%
	East Midlands	7%	7%
	West Midlands	9%	9%
	London	13%	12%
	South East	14%	14%
	Eastern	9%	9%
	South West	8%	8%
	Wales	5%	5%
	Scotland	8%	9%
	Northern Ireland	3%	3%

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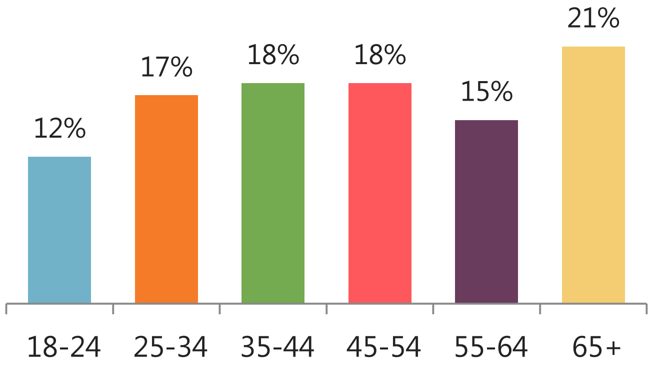
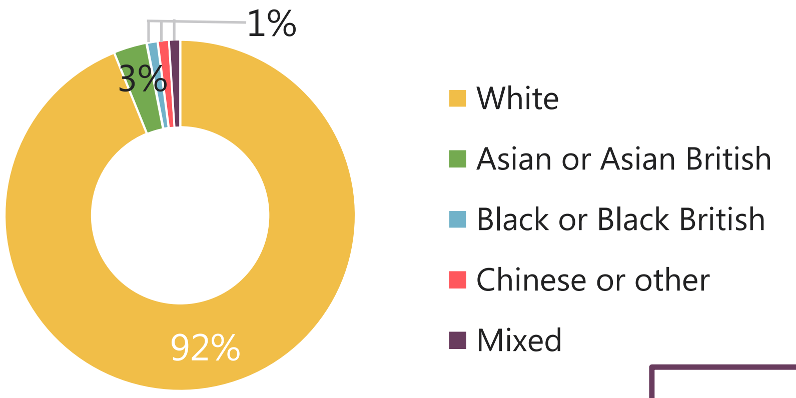
Demographic (weighted) sample profile

Gender

Age



Ethnicity



90% of those interviewed by phone have internet access

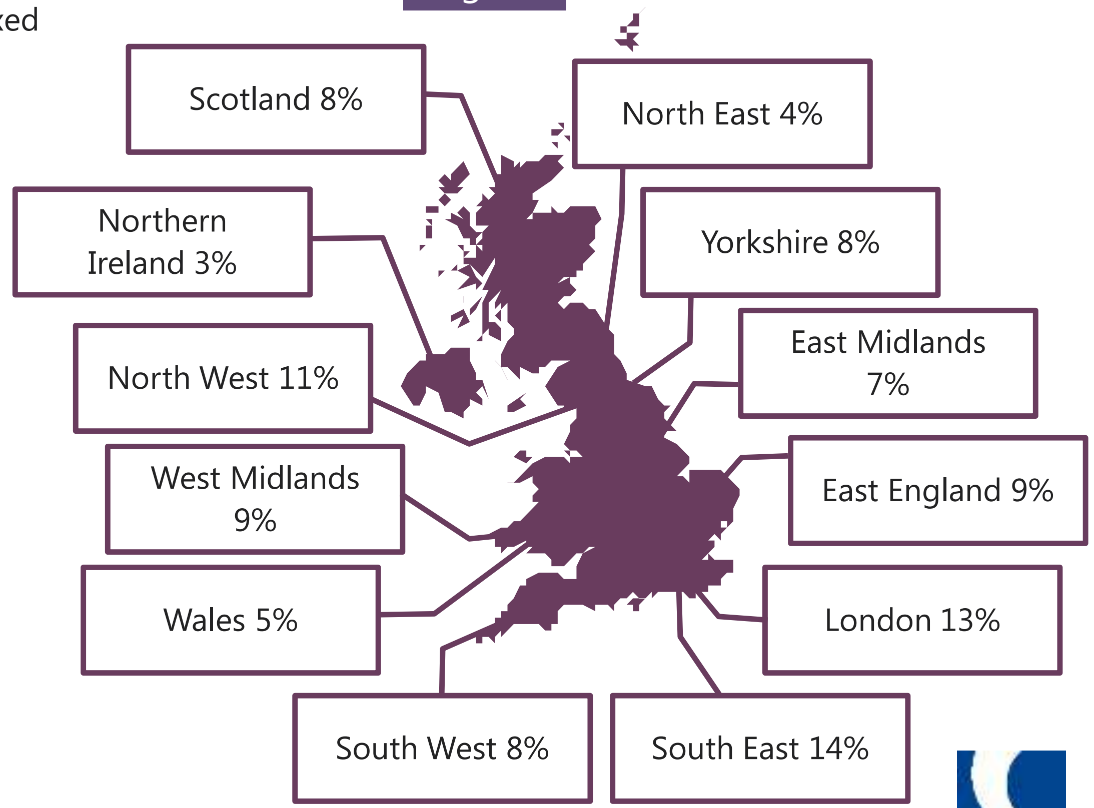
Working Status

Employed full time (30+ hours per week)	41%
Employed part time (8-29 hours per week)	15%
Employed part time (under 8 hours per week)	2%
Not working	9%
Retired	21%
Housewife/househusband	7%
Student/full time education	5%

Household Income

Up to £14,999	15%
£15,000-24,499	17%
£25,000-39,999	24%
£40,000-74,999	22%
£75,000 or more	7%

Regions



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Q1. Gender, Q2. Age, Q3. Working status, Q4. Region, Q130. Ethnicity, Q131. Household income, Base: all participants (3507), Q132. Do you have internet at home? Base: all telephone participants (500)

Executive Summary

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Flying behaviour and enjoyment

Behaviour

- The vast majority have some experience of flying (94% have 'ever' flown) and just over half (54%) have flown in the past 12 months (these are described as 'recent flyers' throughout this report). Around a fifth (18%) could be termed as frequent flyers, having made three or more flights in the past 12 months.
- Flying is predominantly but not exclusively for holiday purposes. In fact three in ten (29%) have flown in the past 12 months to visit friends/relatives and one in ten (13%) have flown for business/work reasons.

Enjoyment

- Over half (57%) enjoy travelling by air, but there is not universal enjoyment of the activity; in fact, one in five actively disagree with the statement about enjoying travelling by air.
  - Enjoyment levels are lower for those who are PRM - only 50% enjoy the experience.
  - They are also lower for those who have not flown recently (66% amongst recent flyers, dropping to 45% amongst those who last flew 4+ years ago).

Barriers

- Budget constraints/cost of travel is the most cited reason for not flying within the past 12 months (42%). However, no doubt a reflection of enjoyment levels, there are relatively frequent mentions of having a preference for other transport modes and a fear of flying (both 11%).
- Of those who have not flown in the past 12 months, almost one in ten cite health and disability issues as barriers that make using the airport or being on-board the flight difficult.
  - Reflecting this, PRMs are less likely than others to have flown in the past 12 months (36% vs 58% of those who are non-PRM), and also more likely to have never flown (10% vs 5% non-PRM).

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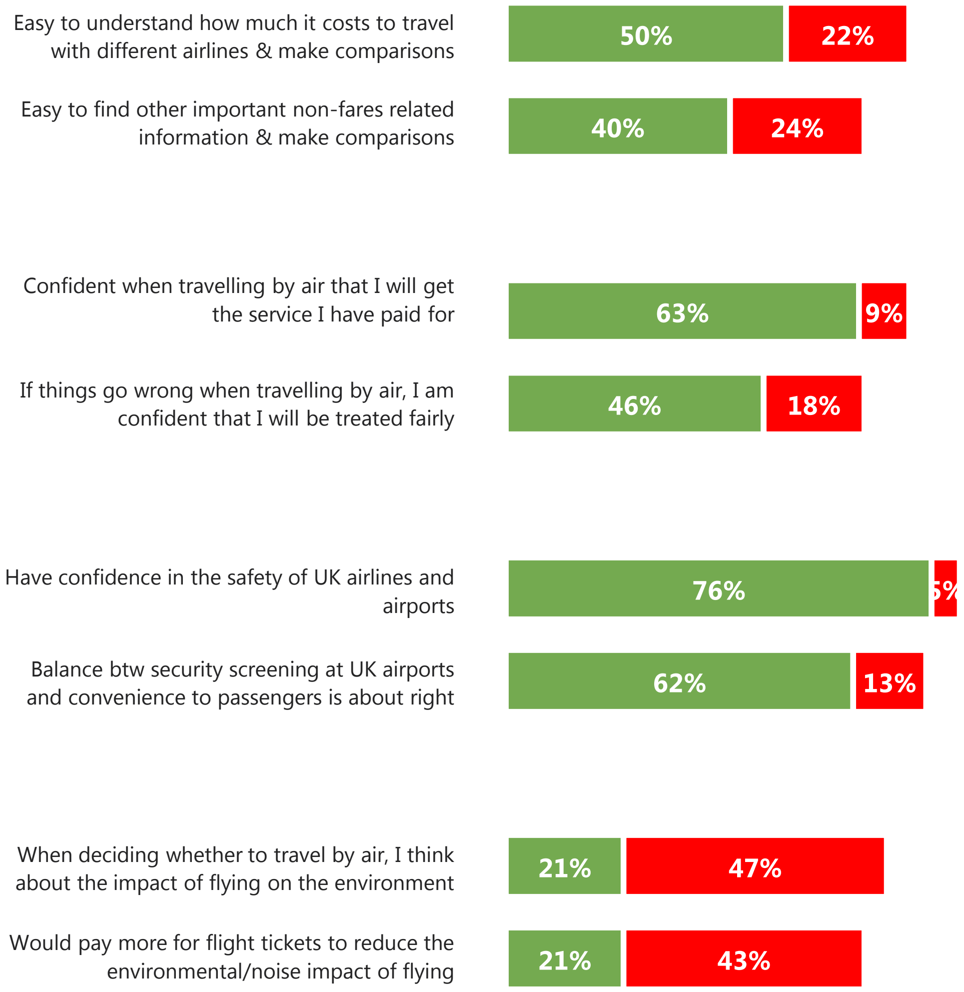
Headline measures

Consumer Choice Whilst half agree it is easy to understand how much it costs to travel with different airlines and to make comparisons, nearly a quarter disagree. Equally, a similar proportion indicates that they struggle to find information about product attributes other than the price of the flight and to make comparisons.

Consumer Confidence Confidence is generally high that consumers will get what they have paid for (only 9% disagree), but there is less confidence that they will be treated fairly when things go wrong.

Security & Safety There is strong confidence in UK airline and airport safety, with three quarters (76%) agreeing that they have confidence. Positively this is even higher amongst those who have recently flown.

Environment Most do not think about the impact of flying on the environment (only a fifth claim to be concerned about it) and there is little willingness to pay more for flight tickets to reduce the environmental/noise impact of flying. Of note, however, concern and willingness to pay more is slightly higher amongst business flyers.



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Booking behaviour and experience

Habits

- Booking flights nowadays is very much online based, with three quarters (78%) booking their last flight via this channel.
  - It is the most common channel across all age groups, but particularly dominant amongst younger flyers (85% of 25-34 year olds booked their most recent flight online).
- Around half book directly with the airline.

Importance

- When asked to trade-off different elements that could be important when booking the flight in the MaxDiff exercise, the most important aspect proved to be price. This is closely followed by the airline's safety reputation, confidence in security standards, convenience of flight times and confidence in how the airline deals with unexpected events.
  - Of least importance are the airline's environmental reputation, the facilities, shops and services at the departure airport, aircraft type and the ability to collect frequent flyer loyalty points.
- The importance priorities were broadly the same for PRMs, except 'assistance provided to those with disability/health issues that make travel difficult' becomes a top area of importance for this group (moving from tenth position, up to fifth position on the importance hierarchy).

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Travel experience

Overall

- Overall satisfaction with the most recent travel experience is high (90%), although ratings tend to be more muted and fall into the ‘fairly’ rather than ‘very’ satisfied category (53% and 36% respectively).
- Satisfaction levels are similar across all traveller groups and, of note, there was no real difference between those who required assistance on their last flight and those who didn’t (6% actually required some assistance from the airport or airline for themselves or a member of their party on their last flight).
  - That said, overall satisfaction levels are lower for PRM travellers who generally find accessing and/or using airports or flying difficult, dropping to 82%.
- Satisfaction for those travelling with children under two years of age is in line with other groups, but dissatisfaction rises to seven percent (against three percent on average). This indicates that most experiences of travelling with young children are positive, but any problems are magnified.

Elements

- The survey captures reflective perceptions of the air travel experience and satisfaction across different elements of the flight and travel experience are all relatively positive. That said, there is a significant minority group (ranging from 3%-15%) who proved to be dissatisfied at each measure.

	Satisfied	Dis-satisfied
Process of booking the flight	89%	4%
Finding way to gate	89%	4%
Ease of finding way around airport in UK	89%	3%
Information about flight status at the UK airport	88%	3%
Deciding which flight to book	87%	4%
Security at the airport in the UK	85%	6%
Check-in and bag drop at airport in the UK	85%	5%
Travelling to/from airport in UK	84%	7%
Baggage collection at the airport in the UK	83%	7%
Passport control in the UK	83%	7%
Overall airport experience	83%	7%
Overall on-board and in-flight experience	81%	6%
Shop, restaurants & services at UK airport	78%	8%
Transfer/connection to another flight	77%	5%
Value for money	76%	7%
Ease of finding information to compare choices	77%	5%
Amount of choice btw UK departure airports	65%	14%
Amount of choice between airlines	61%	12%
Handling of any complaints	54%	15%

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Travel disruption

Lower ratings

- Value for money is towards the lower end of the satisfaction ratings with just three quarters satisfied.
  - Although the findings suggest that in general consumers struggle to make meaningful comparisons between aviation and other sectors, it is worth noting that 42% believe it offers better value than the rail industry, with only 10% believing it offers worse value.
- Whilst most are satisfied with the choice between UK airports and airlines, these elements do attract the least positive ratings.

Disruption

- Around one in seven (14%) recent flyers claimed they experienced some form of disruption on their most recent flight; most commonly this was a flight delay of 2 hours or more. Overall flight experience satisfaction drops markedly for this group to just 77%, and satisfaction levels for the way the problem was handled are quite low (as is often the case with such measures).

Complaints

- A quarter of recent flyers rated a complaint handling experience, and just over half (54%) were satisfied with the way their complaint was handled.

	Satisfied	Dis-satisfied
Process of booking the flight	89%	4%
Finding way to gate	89%	4%
Ease of finding way around airport in UK	89%	3%
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PRM experience

Barriers

- Amongst PRMs, budget constraints and the cost of travel is the most commonly mentioned barrier to having flown in the past 12 months, but is very closely followed by mentions that their health/disability made using the airport or flying difficult (41% budget constraints, 36% mentioned health/disability issues).
- Those with non-physical disabilities are more likely to mention fear of flying as barrier, those with physical disabilities mention access/flight/airport difficulties.

Assistance

- Most of those who require assistance request it at the time of booking the flight. Generally ratings of the assistance are high; 85% satisfied overall and 57% very satisfied. However, as found with other rating attributes, there is still a rumbling element of dissatisfaction (7%, or one in every fourteen).
- In terms of satisfaction levels for the assistance across the journey phases, these were all relatively strong with little difference in results. That said, ratings were a little higher for assistance at the UK departure airport rather than latter stages of the journey.

Expectations

- Based on PRMs who had flown in the past 10 years, generally there is an expectation that their disability or health condition will be dealt with positively when they travel in the future. That said there is not full trust and there is scope for improving confidence levels; in particular, around a quarter did not believe they would be provided information about assistance ahead of the journey or that their assistance needs would be understood and passed on to the airport and airline.
- Those with non-physical disabilities are the least positive about the assistance they will be given in the future.

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Consumer rights and protection

Lacks clarity

- There is confusion surrounding what consumers think they are entitled to when experiencing a delay. Although over half correctly identify provision of food and drink and flight information as a requirement of the airline.
- Over one third (38%) correctly think that information about their rights must be provided when a flight is delayed, but over half (56%) incorrectly think that information about flight status must be provided.

ATOL

- The protection provided by ATOL is not fully understood by the public. Whilst half (51%) of UK consumes recognise that UK holidays (i.e. flights and accommodation) purchased via a UK based company are protected, over a third thinks this also applies to holidays purchased through an EU based company.
- There is also confusion as to whether flights are covered by ATOL protection. 46% believe that flights with a UK airline are covered, and 16% that flights with a foreign airline are covered.

Special assistance

- Eight in ten say that those with physical disabilities are entitled to special assistance, but only one third of consumers think that special assistance is available for those with non-physical disabilities.
- There is relatively high awareness that assistance is available once at the airport but that this does not extend to include help from the car park (31% believe assistance is available here).

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Headline measures

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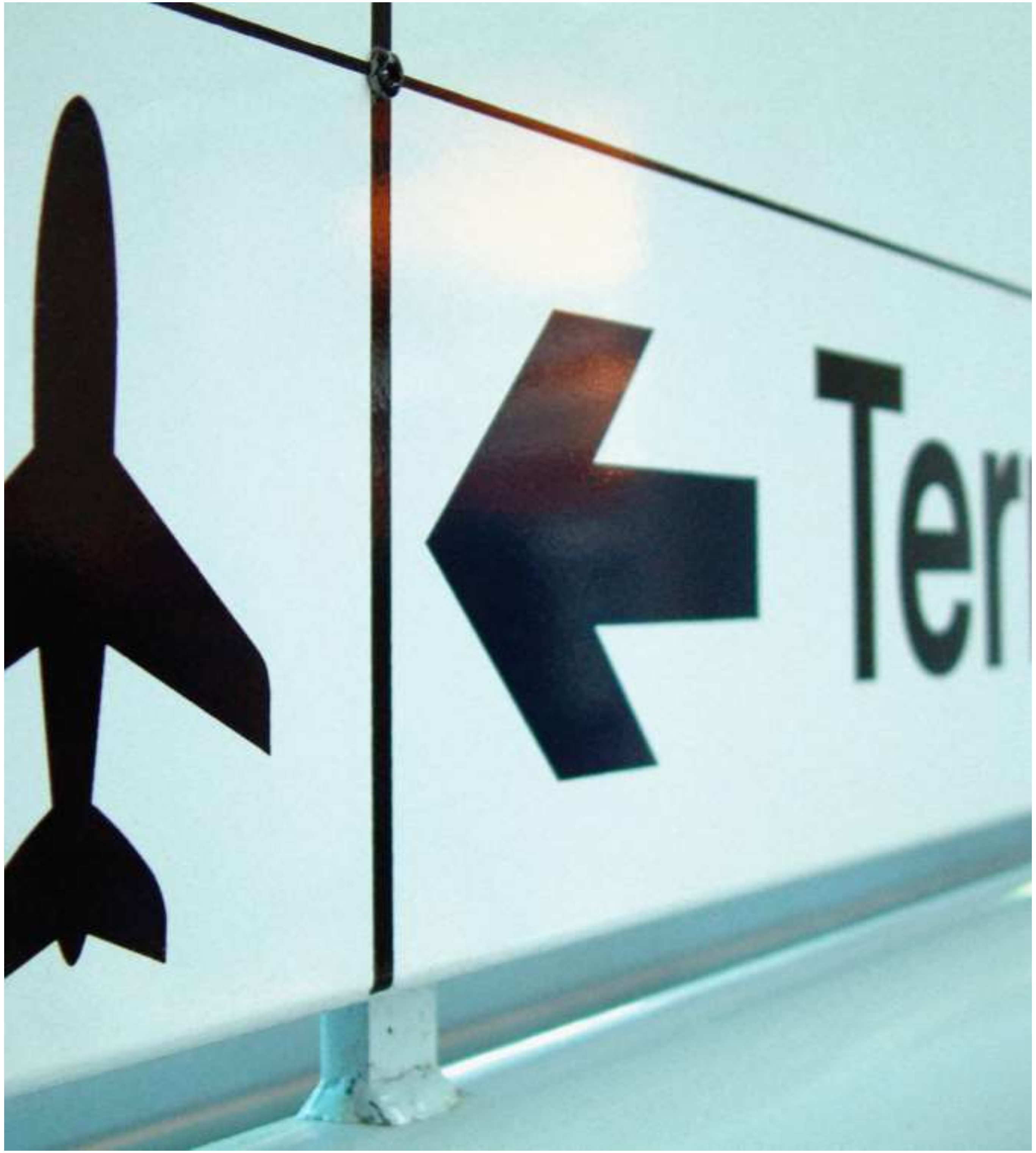
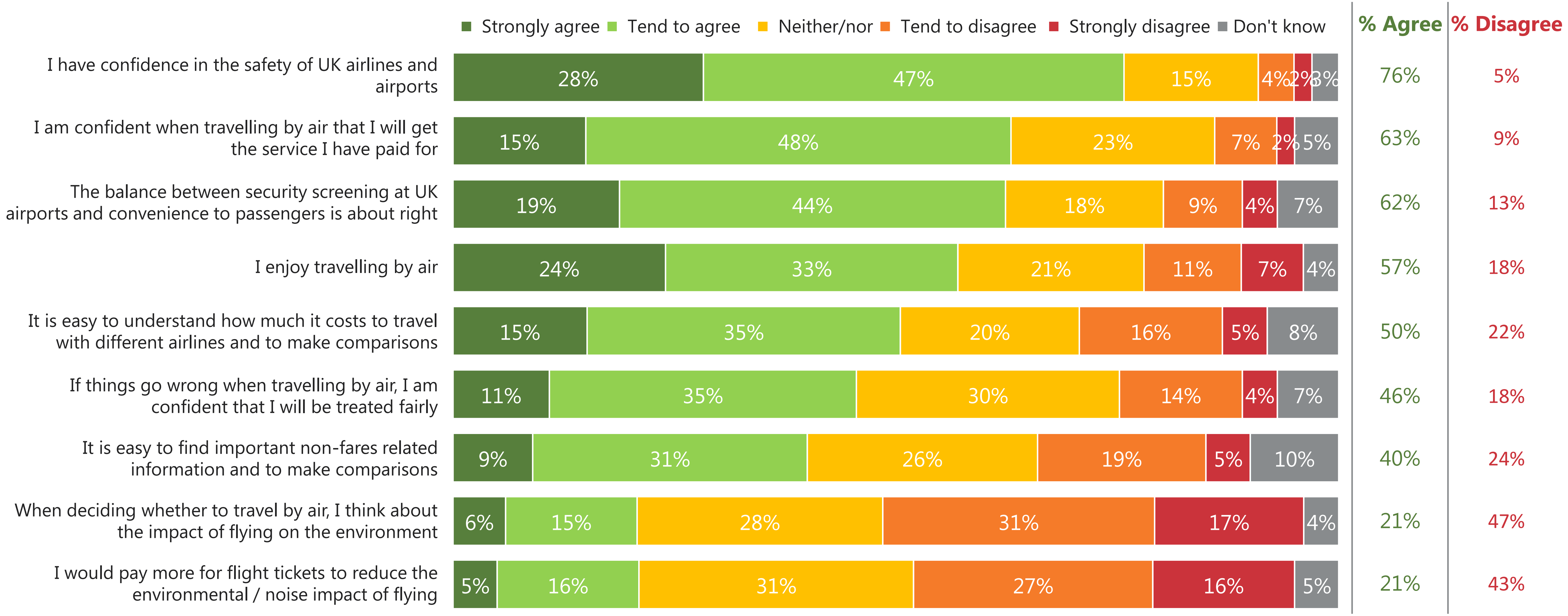


Headline Measures: Overall

Three quarters of UK consumers are confident in the safety of UK airlines and airports



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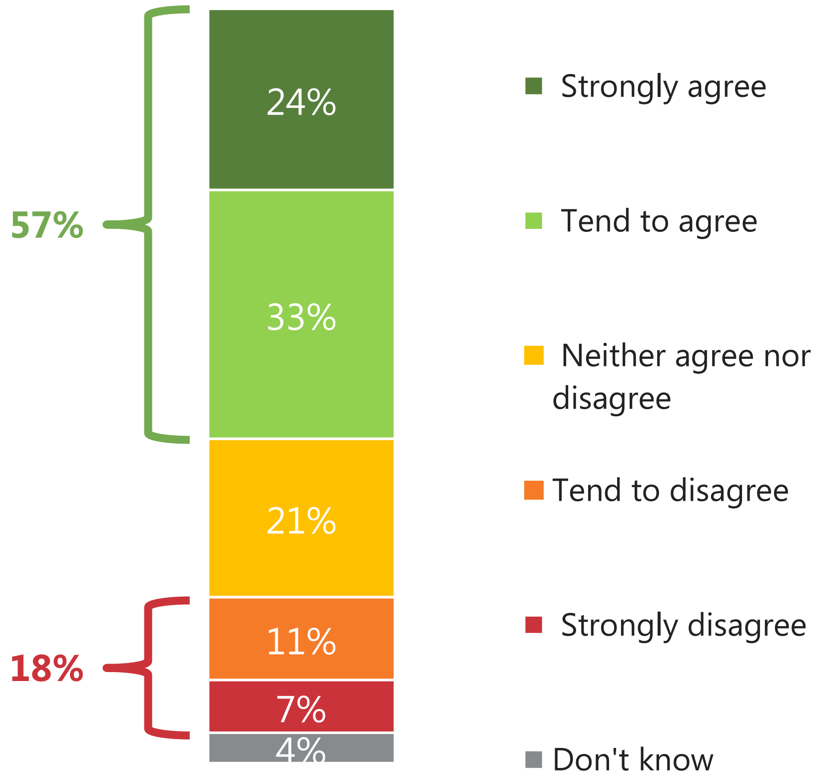
Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3507)

Headline Measures: Overall

Over half of UK consumers enjoy travelling by air, and almost one quarter strongly agree that they enjoy flying. However, a sizeable minority of 18% do not enjoy travelling by air.



I enjoy travelling by air

- More recent flyers (flown in the last 3 years) tend to enjoy flying the most, with almost two thirds (65%) agreeing compared to 49% of those who last flew between four and ten years ago.
- Amongst different age groups, there are broad similarities in the proportions who enjoy and do not enjoy flying, although only 12% of those aged 18-24 disagree with the statement - a lower proportion than across UK consumers as a whole. **Age**
- There is a difference in how much PRMs and non-PRMs enjoy flying. Amongst PRMs, 50% agree they enjoy flying and 23% disagree, compared to 59% and 17% of non-PRM consumers. PRMs with a physical disability are slightly more likely to agree than PRMs with a non-physical disability (51% vs 46%, though this is not a significant difference) and are less likely to disagree (21% vs 27%). **PRM**
- Those who have recently flown with children disagree with this statement the most: nine percent strongly disagree, higher than the four percent of those who flew without children who strongly disagree. However, two thirds of both groups enjoy flying. **Children**
- Paying extra for a premium flight experience does not equate to increased enjoyment: there is very little difference between those whose most recent flying experience was in premium cabin classes (First and Business) compared to those in economy (including 'premium economy' classes). **Premium**

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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3507)

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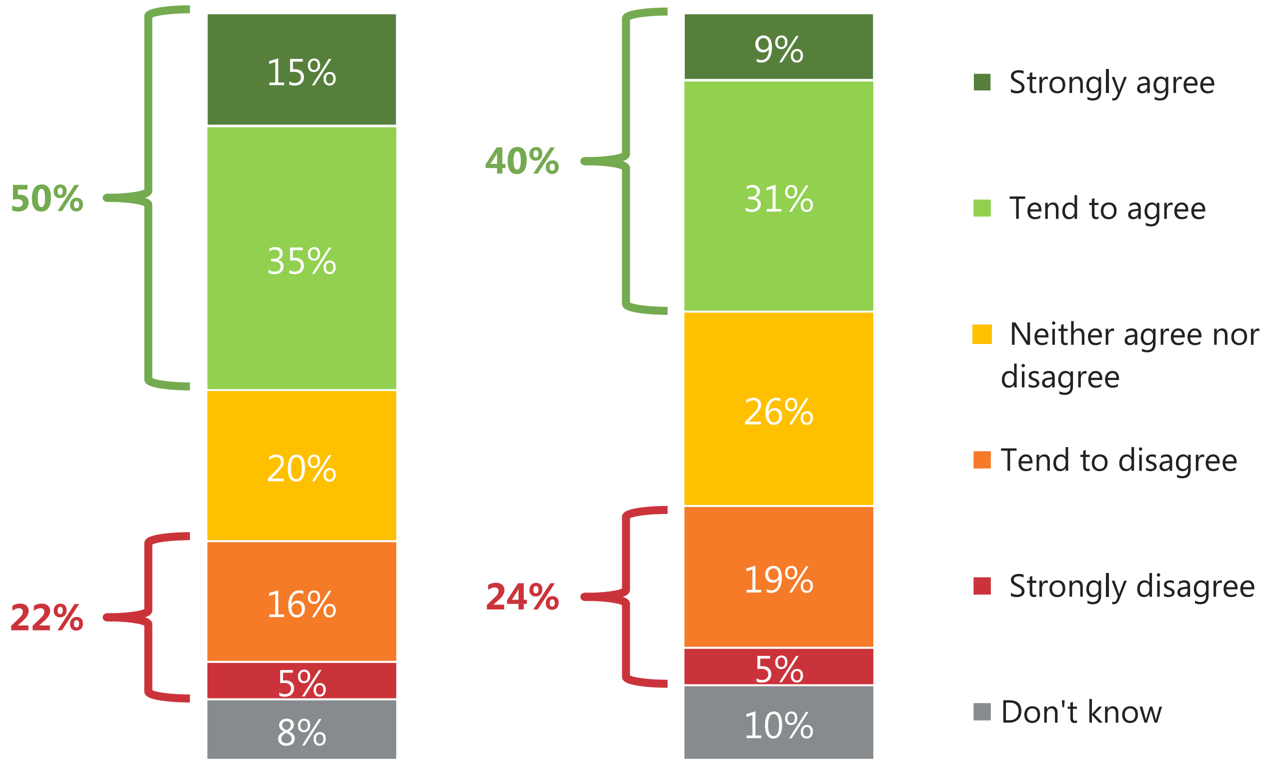
Headline Measures: Consumer Choice

When searching for flights, half of UK consumers find it easy to understand and compare costs of travelling with different airlines, but slightly fewer find it easy to find non-fares related information.



It is easy to understand how much it costs to travel with different airlines and to make comparisons

It is easy to find other important non-fares related information and to make comparisons

- More recent flyers (flown in last 3 years) are more likely to agree with both statements; 58% of recent flyers agree it is easy to understand costs and 47% agree it is easy to find important non-fares information.
- Amongst those who book online, 63% of travellers agree that it is easy to understand and compare costs between airlines, a difference compared to general UK consumers.
- Those who book with travel agents and directly with airlines are also more likely to find it is easy to compare and understand costs, with 61% and 65% agreeing with this statement respectively.
- Those who book online or by telephone are more likely to agree that it is easy to find non-fares related information (50% and 51% agree respectively).

Booking method

- A quarter of those aged between 45 and 64 find it difficult to understand and compare prices between flights, higher than younger generations (18-34), of whom 18% find it difficult.

Age

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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3507)

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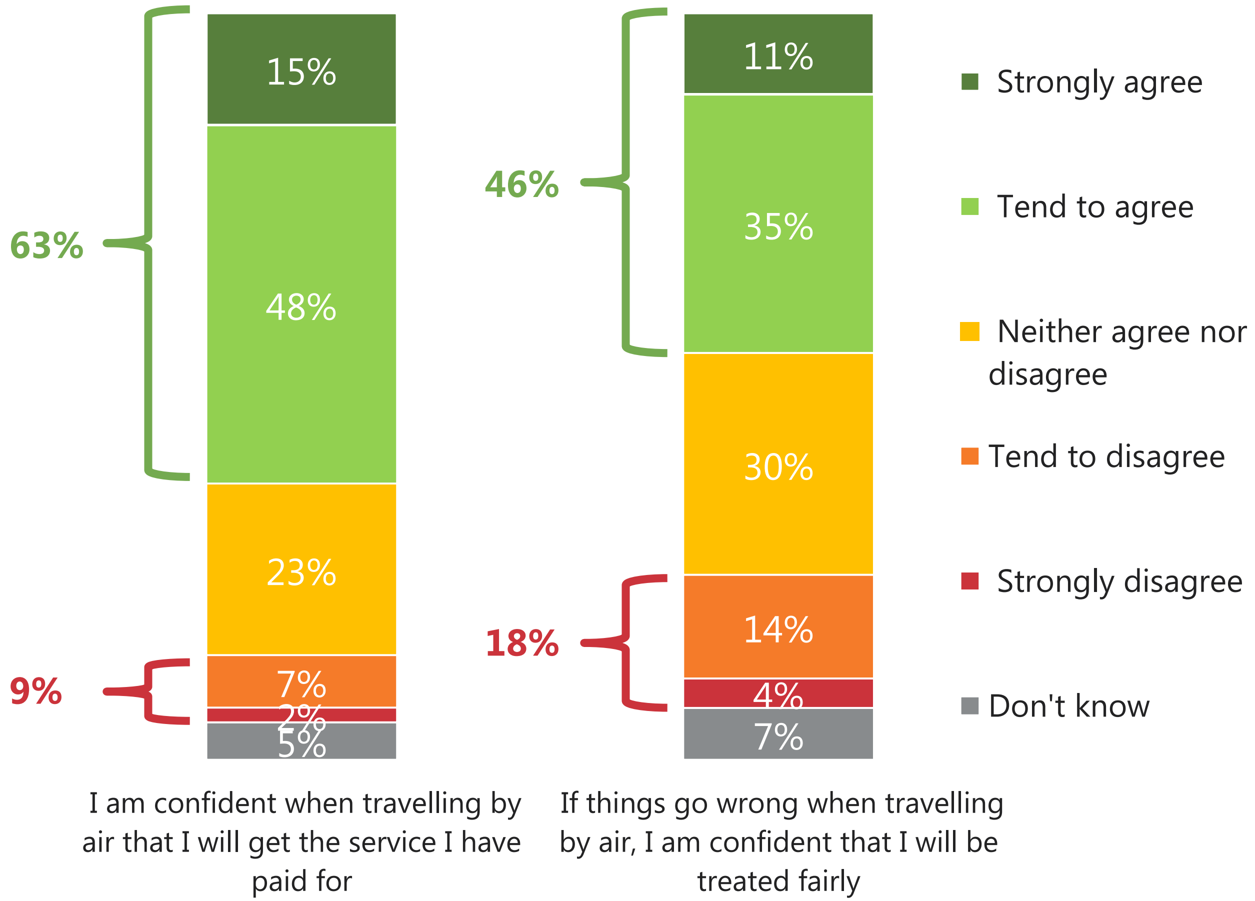
Headline Measures: Consumer Confidence

UK consumers are generally confident that they will get what they pay for when they book, but are less confident that they will be treated fairly if things go wrong.



- Those who have flown relatively recently (within the last 3 years) are more confident than UK consumers overall that they will get the service they have paid for (69% agree) and that they will be treated fairly in the event of something going wrong (49% agree).
- 58% of PRMs are confident that they will get what they paid for, compared to 64% of non-PRM flyers. However, both groups are similarly less confident that if something goes wrong they will be treated fairly
- Half of flyers who booked online are confident that they will be treated fairly if things go wrong. 54% who booked their flights face to face share this confidence, more than those who have booked over the phone, of whom 42% are agree with the statement.

PRM

Booking method

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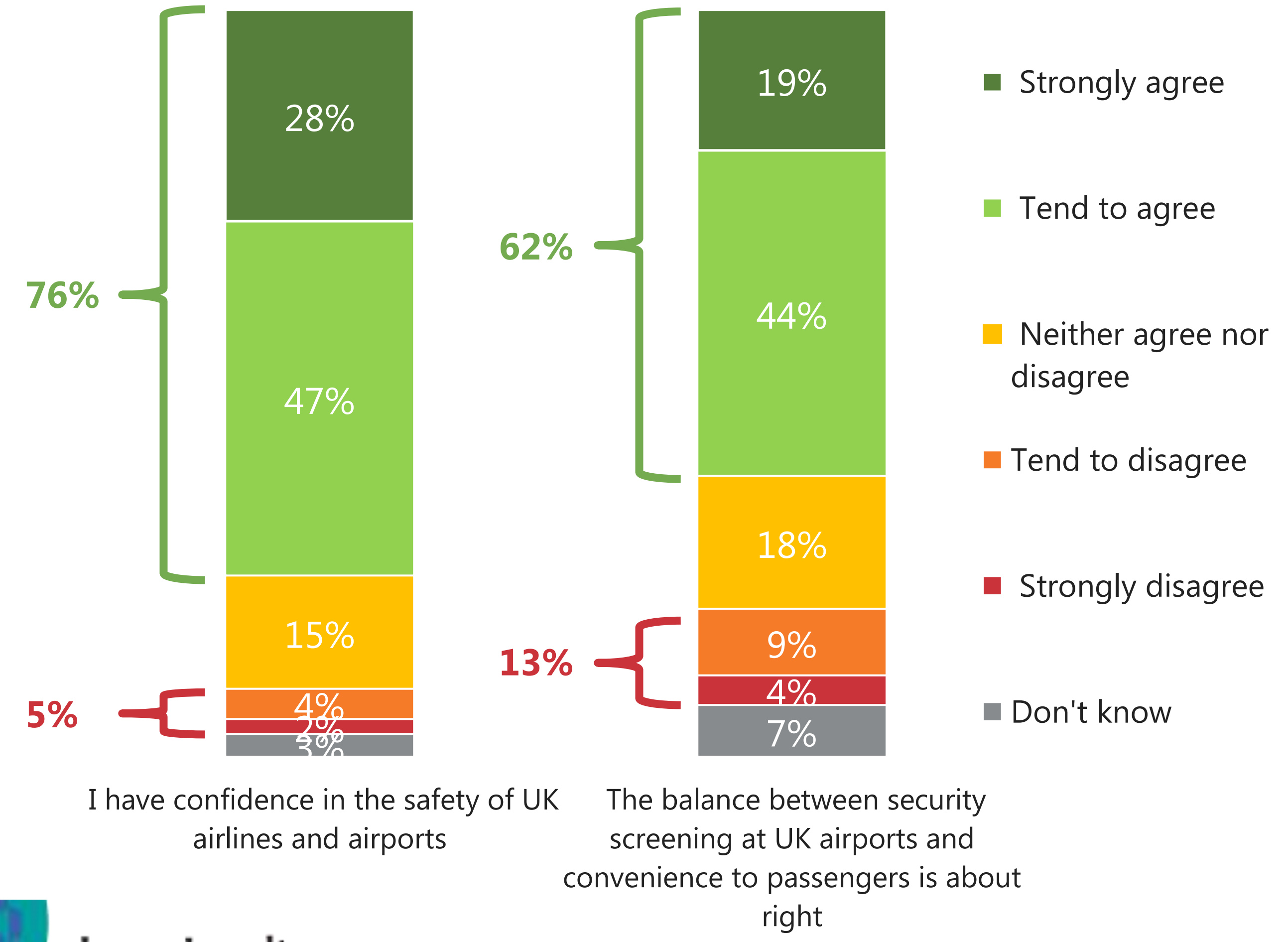
Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3507)

Headline Measures: Security and Safety

Confidence in the safety of UK airlines and airports is the highest rated headline measure: three quarters of UK consumers and 82% of recent flyers are confident in the safety of UK airlines and airports.



- Most people think the balance between airport security and screening and convenience to passengers is about right. 62% of UK consumers and 70% of more recent flyers (flown in last 3 years) are happy with the balance.
- Older people are more likely to have faith in the safety of UK airlines and airports. 81% of those aged 65+ agree that they are safe and only 4% disagree, compared to 73% and 7% of those between 18 and 24.
- Only 68% of PRMs think that UK airports are safe, less than non-PRMs (78% agree). Those whose disability is non-physical are even less likely to agree (59%, with 12% disagreeing).
- PRMs are also more likely to think that the balance between airport security and convenience with passengers is not right; 56% of PRM travellers agree with this statement, compared to 64% of non-PRMs. Again, those with non-physical conditions are less likely to agree (47%).

Age

PRM

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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3507)

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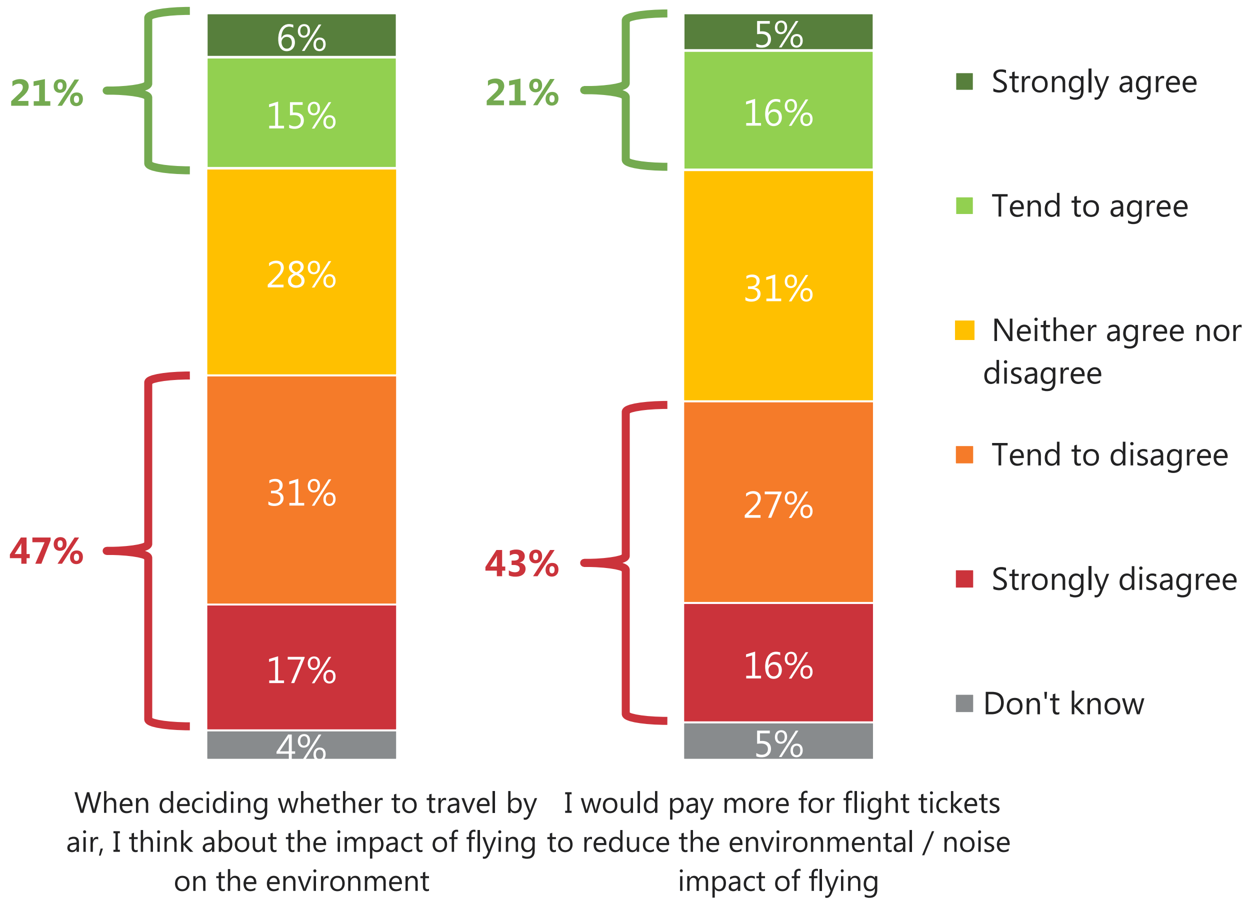
Headline Measures: Environment

The environment is not a factor for most people when they think about flying to a destination, and most people would not be willing to pay more to reduce the environmental impact of flying.



- A quarter (24%) of flyers travelling with children younger than eighteen think about the environment when flying compared to 19% of those travelling without children. Those travelling with children are also more likely than average to agree that they would pay more for a flight to offset the environmental impact (27%).
- Those who have flown for business purposes in the last 12 months are more likely than non-business flyers to think about the environment whilst flying; 29% of business travellers agree that they think about the environment, compared to 19% of non-business flyers.
- There are no differences between age groups when it comes to thinking about the environment whilst flying. That said, younger people are marginally more likely to claim that they are be willing to pay extra to reduce the environmental impact of flying (24% of 18-34 year olds agree).

Children

Purpose

Age

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Q40. Here are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements? Base: All participants (3507)

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Flying behaviour

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Flying behaviour - Summary

The vast majority of UK consumers have flying experience with over half having recent flying experience. This decreases amongst PRMs, though experience of flying is still common in this group.

- **Almost all participants have some experience of flying, 94% have flown before, with over half (54%) having flown in the last 12 months. This differs somewhat across sub groups:**
  - Amongst PRM this falls to 89% and further still for those who consider their disability to be non-physical (85%).
  - Those most likely to have flown more recently, that is in the last year, are aged 18-24 (60% vs 54% average) and 55-64 (59%).
  - High earners are also more likely to have flown in the last year, increasing to 70% of those earning £40,000 to £74,999 and even more so for those earning £75,000 or more (81% flew in last 12 months).
- **Among recent flyers (those flying in last 12 months) over two thirds have flown more than once and a fifth have flown four or more times within this period. Again there are some groups that deviate from the average:**
  - Those with children aged 0-17 and those who book face to face are less frequent flyers than UK consumers overall; each group is more likely to have flown just once in the last year (54% of those with children aged 0-17 and 49% of those who book face to face compared to 34% overall).
  - The older (55+) age groups and higher earners (£75,000+) are the more frequent flyers (24% and 33% flying four or more times in the last 12 months).
- **The most commonly cited barrier to flying is budget/cost (42%).**
  - In addition to health/disability issues, PRM are also more likely to cite fear of flying as a barrier (15% vs 11%), this is largely driven by those who consider their disability non-physical (20%).
- **One in six (17%) of UK consumers consider themselves to have a disability or health condition that limits their day-to-day activities.**
  - 55% of PRM consider their condition as physical only and 21% as non-physical only. 23% class their condition as both physical and non-physical.
  - Half of PRM (52%) find accessing airports/flying difficult, this increases to 57% for those with a physical condition (vs 47% with a non-physical condition).
  - Two thirds (68%) of those who cite difficulty accessing airports/flying require assistance in these areas. Again, this is most likely for those with a physical condition (73% vs 57% non-physical).

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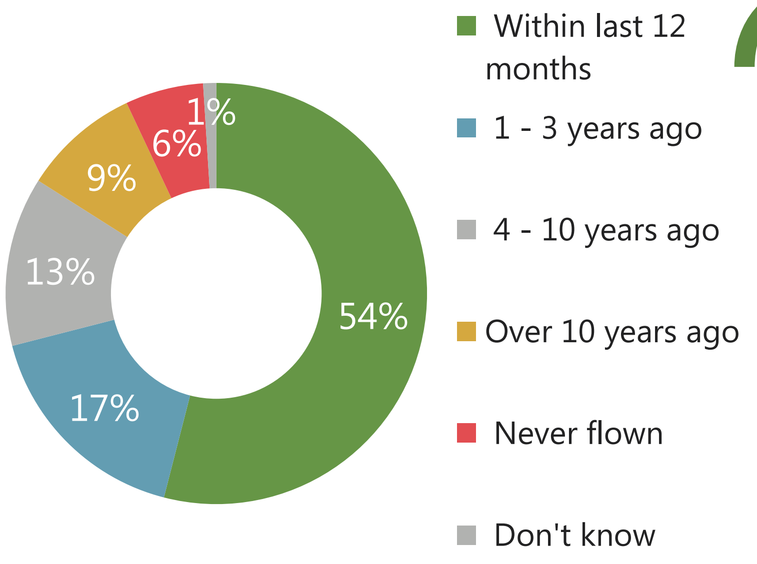
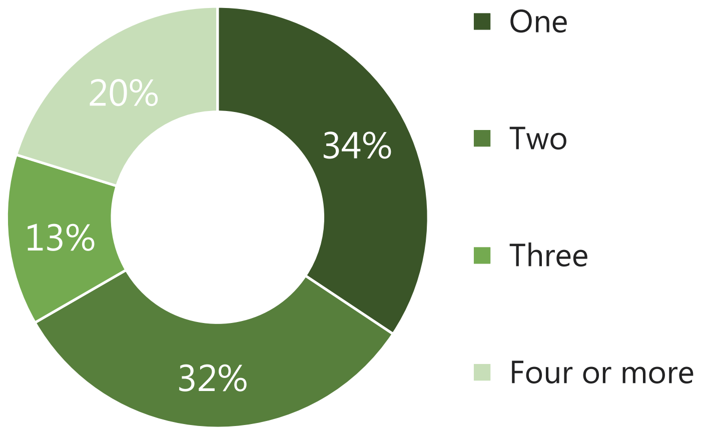
Flying behaviour: A general overview

The vast majority (94%) have ever flown and just over half have flown in the last year. Among these more recent flyers, two-thirds have flown more than once in the past year and the majority of trips are for holidays.

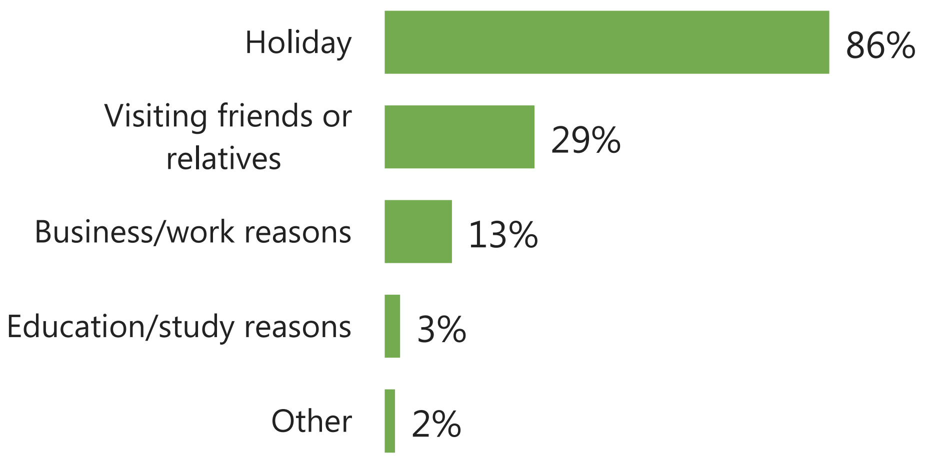
Last flight from a UK airport



Number of flights in the last 12 months



Purpose of lights in the last 12 months



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Q10. When was the last time you flew from a UK airport? Base: All participants (3,507) | Q11. How many trips by air have you made in the last 12 months? Q12. For which of these reasons have you made flights in the last 12 months? Base: All who have flown in the last 12 months (1,913)

Flying behaviour: Barriers

Budget constraints/cost of travel is the most cited reason for not flying within the past year.

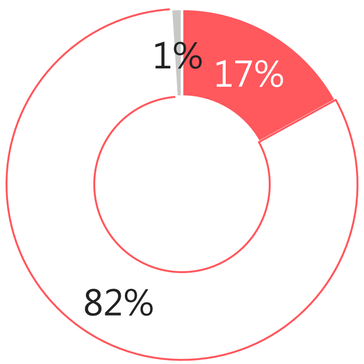
Ipsos Loyalty

Q20. Why have you not flown within the last 12 months/not flown in recent few years/never flown? Base: All who have not flown in the last 12 months (1,594)

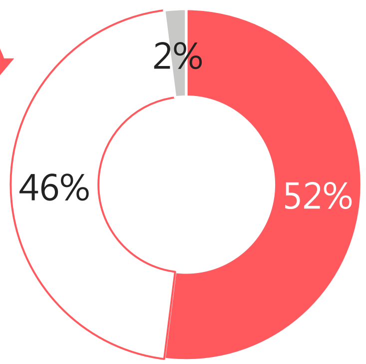
Flying behaviour: Those with disabilities

Almost 1 in 6 is a person with restricted mobility (PRM) (defined as those who have a disability or health condition). PRMs are less likely than Non-PRMs to have flown within the last 12 months and more likely to have never flown.

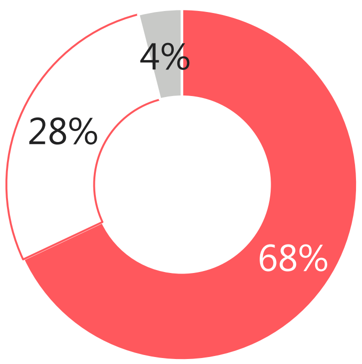
Disability or health condition?



Does/would disability or health condition make airports/flying difficult?

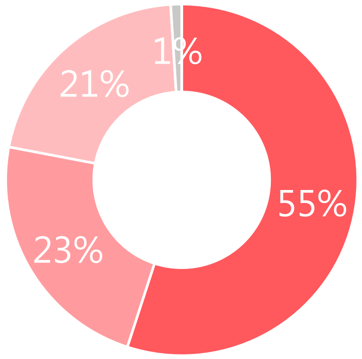


Disability or health condition means assistance would be needed when taking a flight



6% of UK consumers are PRM needing assistance when taking a flight, but only 3% of UK consumers who have flown in the last 12 months.

Is disability physical/non-physical or both?



Last flown from UK airport

	Within last 12 months	1 - 3 years ago	4 - 10 years ago	10+ years ago	Never flown
PRM	36% ↓	17%	19% ↑	16% ↑	10% ↑
Non-PRM	58%	17%	12%	8%	5%

↑ ↓ = significant difference v Non_PRM

Ipsos Loyalty

Q30. Do you have any disability/health condition that limits your day-to-day activities? Base: All (3,507) | Q31. Does/would your disability make accessing/using airports/flying difficult? Base: All PRM (607) | Q32. Would you classify your disability as physical/non- physical/both? Base: All PRM (online participants only, 558) | Q33. Does your disability mean that you would need assistance from the airport/airline when making a flight? Base: All PRM who need assistance flying (Base: 315) | Q10. When was the last time you flew from a UK airport? Base: All participants (3,507), All PRM (607)

Civil Aviation Authority

Recent flying experience

Ipsos Loyalty

Recent flying experience - summary

UK consumers typically take Economy class international flights for leisure purposes. Flights are most frequently booked online. Satisfaction across the flying experience is high though there are some pain points when disruptions are experienced. One in seven experience disruption.

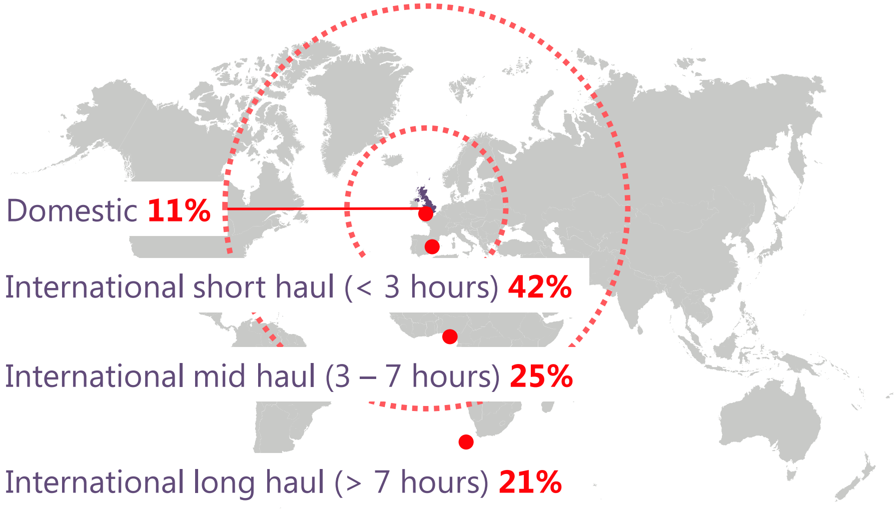
- **Of those who have flown in the last 12 months, two fifths (41%) flew in the last 3 months and two thirds (64%) within the last 6 months.**
  - For most, the last flight was an international flight (89%), largely short haul (42%). The majority of recent flying was for holidaying purposes (70%). International flying was more prominent amongst those with children (94%) and those who booked via a holiday company (98%). One in 10 of UK consumers (11%) took a domestic flight, and this increases to 24% amongst those who have flown for business purposes in the last year.
  - The most common cabin type was Economy (84%). Business flyers largely fly Economy (73%) but are more likely to travel in First (4%) or Business class (12%) than UK consumers overall.
- **Booking flights is very much online based, with 78% of participants booking their last flight via this channel. This increases for domestic and short haul flyers (88% and 85%).**
  - Younger flyers, particularly 25-34 year olds are most likely to use online channels (85%), though online is also the dominant channel across all groups, including those who are 65 and older (71% of last flights were booked online by this group).
  - Half (52%) booked directly with the airline, the remainder is fairly evenly split between direct with the holiday company/tour operator and through a travel agent, flight or travel comparison site.
- **Satisfaction with the travel experience is high (90%) across the full journey from the booking stage to the in-flight experience. There is some dissatisfaction around complaints handling (15% dissatisfied), choice between UK airports (14%) and choice between airlines (12%).**
  - Key Driver Analysis has revealed that the on-board and in-flight experience has the greatest impact on overall flight satisfaction.
  - 14% of recent flyers experienced disruption (including delays of 2 hours or more, lost/damaged luggage and cancellations), which also impacts on overall flight satisfaction. Feedback on disruption resolution gains a notable level of dissatisfaction, hovering just below half; information provision (44% dissatisfied), outcome of complaint (45%), arrangements for looking after flyer (47%). Dissatisfaction increases even further for ratings of redress (58%).

Ipsos Loyalty

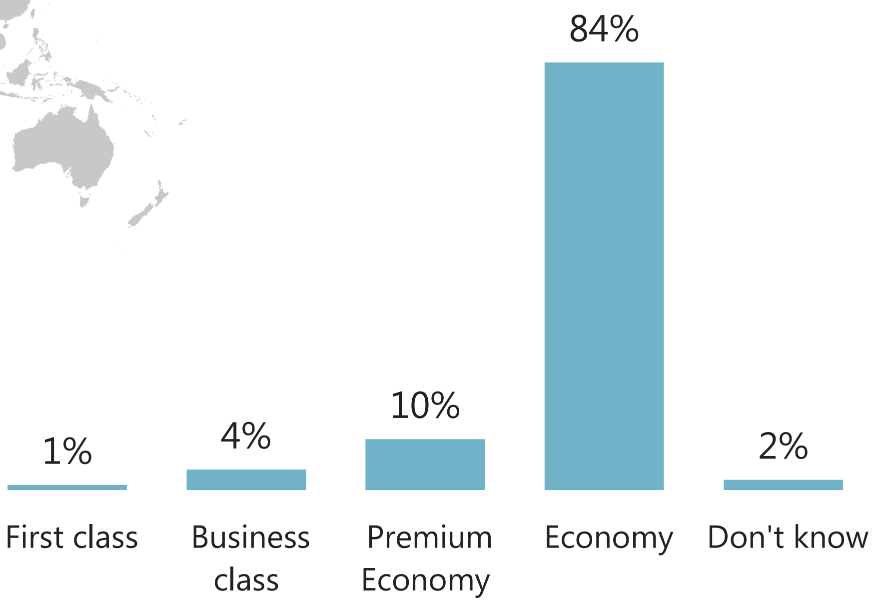
Last flight: Journey details (1)

UK consumers took a mix of international short, mid and long haul and domestic flights. Over four in five travelled in Economy class, with just 1% in First class. Gatwick, Heathrow and Manchester were the most commonly used departure airports.

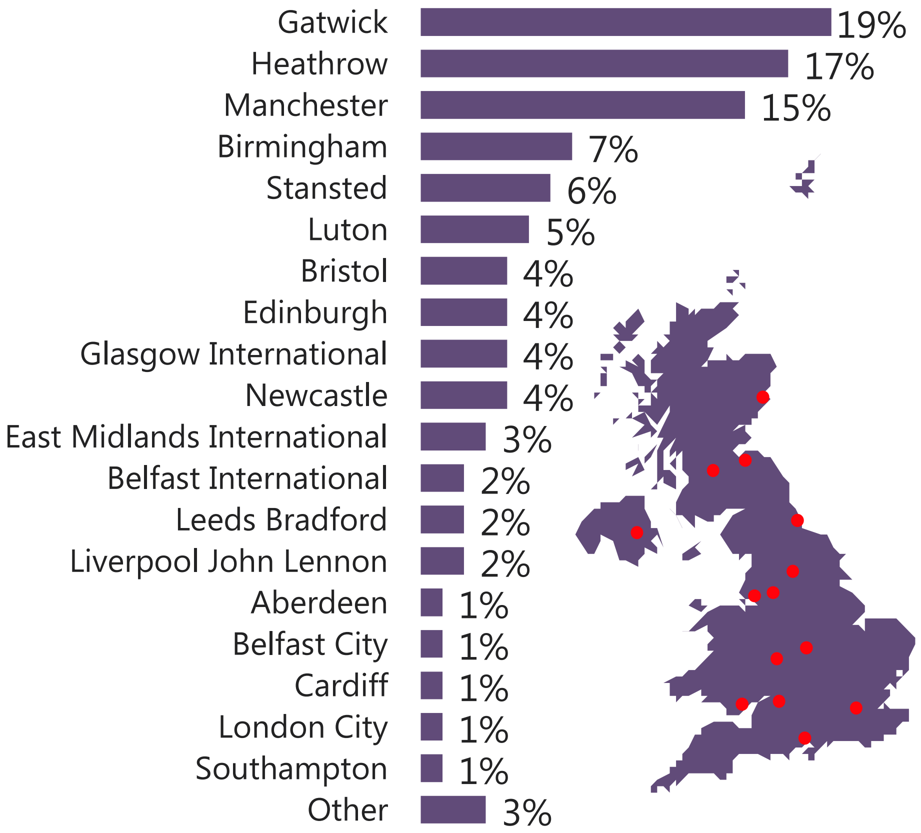
Was the flight domestic or international?



Cabin class



Departure airport



Ipsos Loyalty

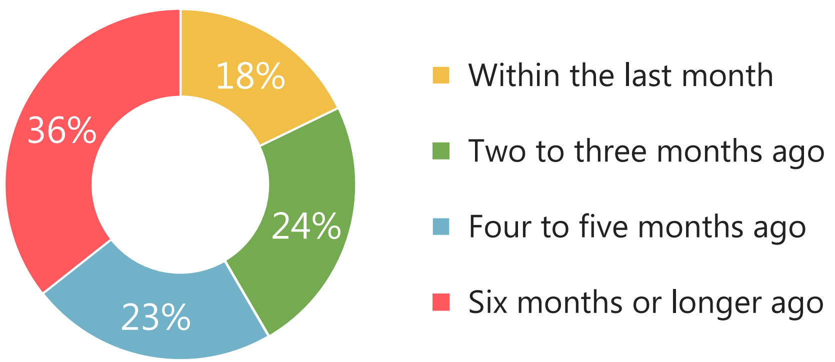
Q51. Was this flight domestic or international?, Q53. What airport did you fly out from in the UK?, Q54. Which cabin class did you travel in for your last flight? Base: All who have flown in the last 12 months (1,911)

Civil Aviation Authority

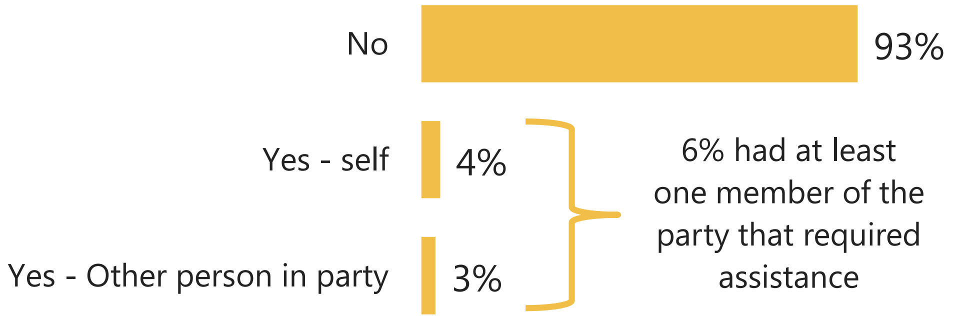
Last flight: Journey details (2)

Almost one in five flew within the month prior to the survey and flights were mainly for leisure purposes. Just over one in twenty either needed assistance or travelled with someone who needed assistance and one in six travelled with children.

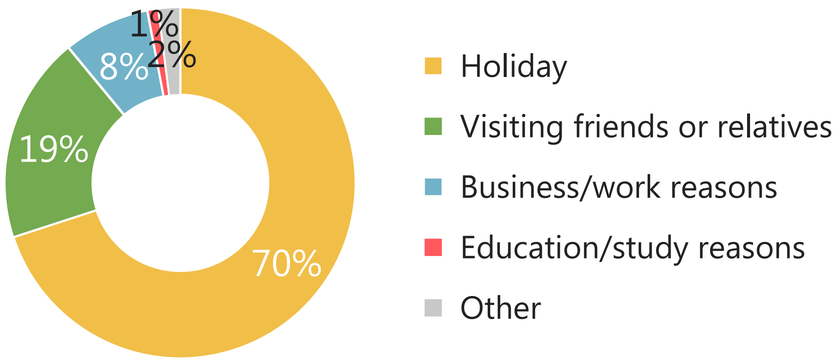
Recency of last flight



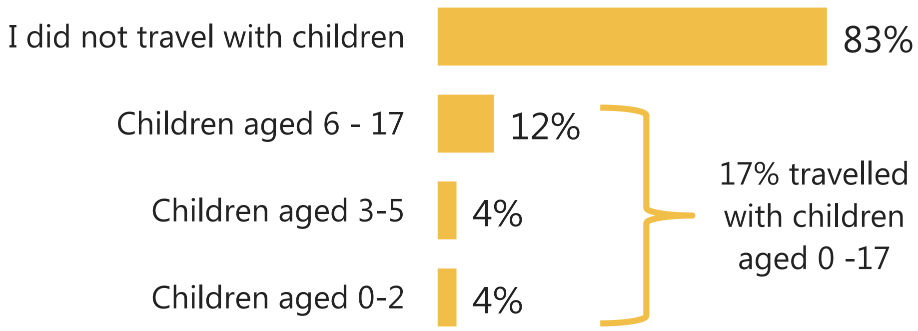
Assistance needed last flight due to disability/health condition?



Main flight purpose last flight



Travelling with children on last flight?



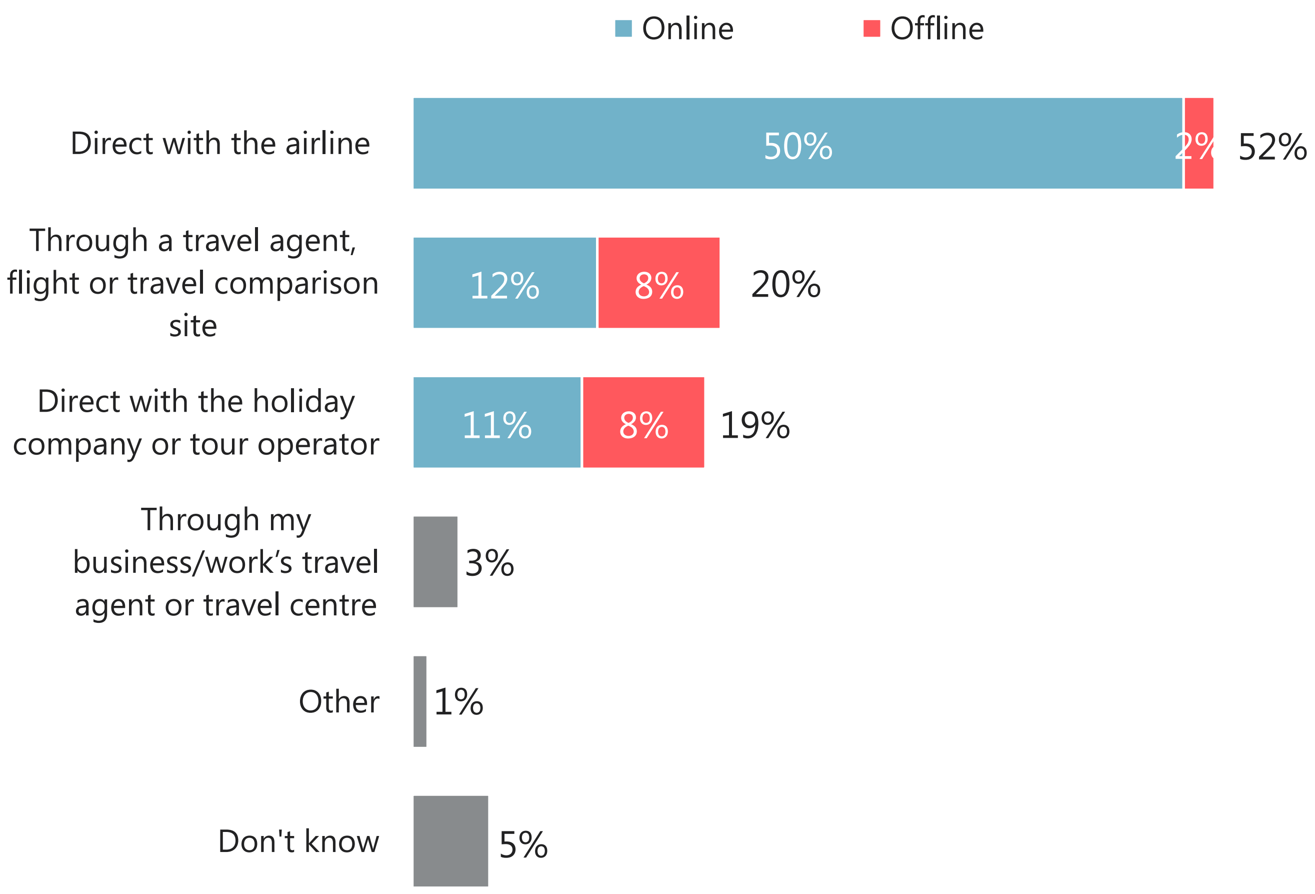
Ipsos Loyalty

Q50. Roughly, when was the last time that you flew?, Q52. What was the main reason for your last flight?, Q55. If you travelled with children on this occasion, what age were the children?, Q56. Did you or anyone in your party have a disability or health condition that meant assistance from the airport or airline on either the outward or return flight?: Base: All who have flown in the last 12 months (1,911)

Last flight: Booking method

Over three quarters of flights are booked online, and half are booked online through an airline's website.

Booking method on last flight



Booking method	
Online	78%
Face to face	10%
Telephone	8%
Other	1%
Don't know	3%

Who booked with	
Direct with the airline	52%
Through a travel agent, flight or travel comparison site	20%
Direct with the holiday company or tour operator	19%
Through my business/work's travel agent or travel centre	3%
Other	1%
Not involved in booking flight	4%
Don't know	1%

Ipsos Loyalty

Q57. How was this most recent flight booked? Please tell us who you booked the flight with and then the method used. Base: All who have flown in the last 12 months (1,911)

Extra information required when choosing and booking

Extra information is required about baggage, legroom and, amongst PRMs, the process of booking assistance.

I really need to book an extra seat, but without all the other nonsense and extra fees associated with a person sitting in that seat. I need more room due to my disability."

I think the exact amount it costs for extra legroom seats should be made easier to find, also details about the diabetic meals was difficult to find and whether or not hold luggage was included in the price and the weight of this."

Wasn't clear about the process of getting help, and when we should ask for help for my wife who needed a wheelchair as she can't walk a long way."

The hand luggage weight/measurements allowance is something that is always difficult to find and changes all the time depending on the airline. I've now got a baby and need to book future flights. I find quite challenging to find the information about what's allowed for babies to carry i.e. pram, car seat, etc."

I have had major problems getting the correct level of assistance in the airport. I had some difficulty when booking to ensure I had booked the correct level."

Total cost including hold baggage. Too opaque and cumbersome to have to book that separately. Misleading when making initial comparisons."

Ipsos Loyalty

Q58. When you were choosing and booking this last flight, was there any information that you particularly needed but which proved either hard to obtain or hard to understand?
Base: Recent flyers who booked online

Last flight: Overall satisfaction

Overall satisfaction with the most recent travel experience is high, with nine in ten recent flyers satisfied with their last experience, and only three percent dissatisfied. Just over a third are very satisfied with their last flight.

- Most sub-groups, including travellers across most ages, are in line with this overall trend. However, amongst the 65+ age group, satisfaction is significantly higher than overall, 93% of whom are satisfied with their most recent flight experience.
- Satisfaction drops amongst those who experienced disruption, to 77% satisfied and 10% dissatisfied.
- Amongst PRMs who find accessing and/or using airports or flying difficult satisfaction drops to 82% and dissatisfaction increases to eight percent. Satisfaction amongst PRMs who have difficulty and feel that they require assistance satisfaction drops further to 80%.
- Satisfaction for those travelling with children under two years of age is in line with other groups, but dissatisfaction rises to seven percent, indicating that most experiences of travelling with babies are positive, but any problems are magnified.

Age

PRM

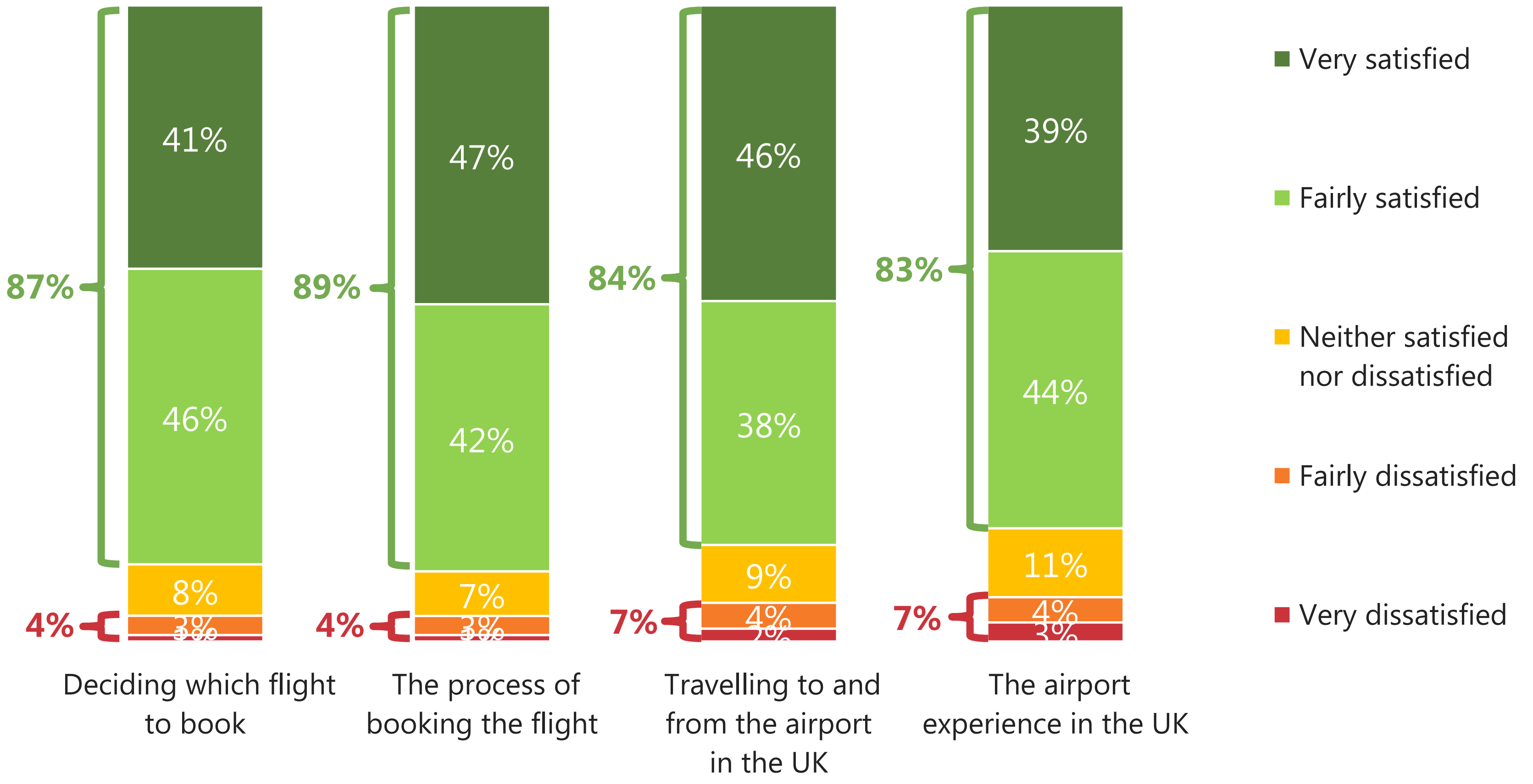
Children

Ipsos Loyalty

Q61. Now taking all the elements into account, how satisfied or dissatisfied were you with the overall travel experience on this most recent occasion? Base: All who have flown in the last 12 months exc. DK (1,909)

Last flight: Satisfaction with elements of the journey

Satisfaction with booking, getting to the airport and the airport is typically high.



- Satisfaction for deciding the flight and the process of booking is lower amongst those who booked via business/work's travel agent or travel centre (75% and 77% respectively).
- Travelling to the airport is rated comparably well with the exception of those located in London where this falls short (77% satisfied, 10% dissatisfied).
- The airport experience falls below average for East Midlands International and Stansted (both 72% satisfied, 12% dissatisfied). Again, those based in London are also less satisfied with the airport experience (77% satisfied, 11% dissatisfied).

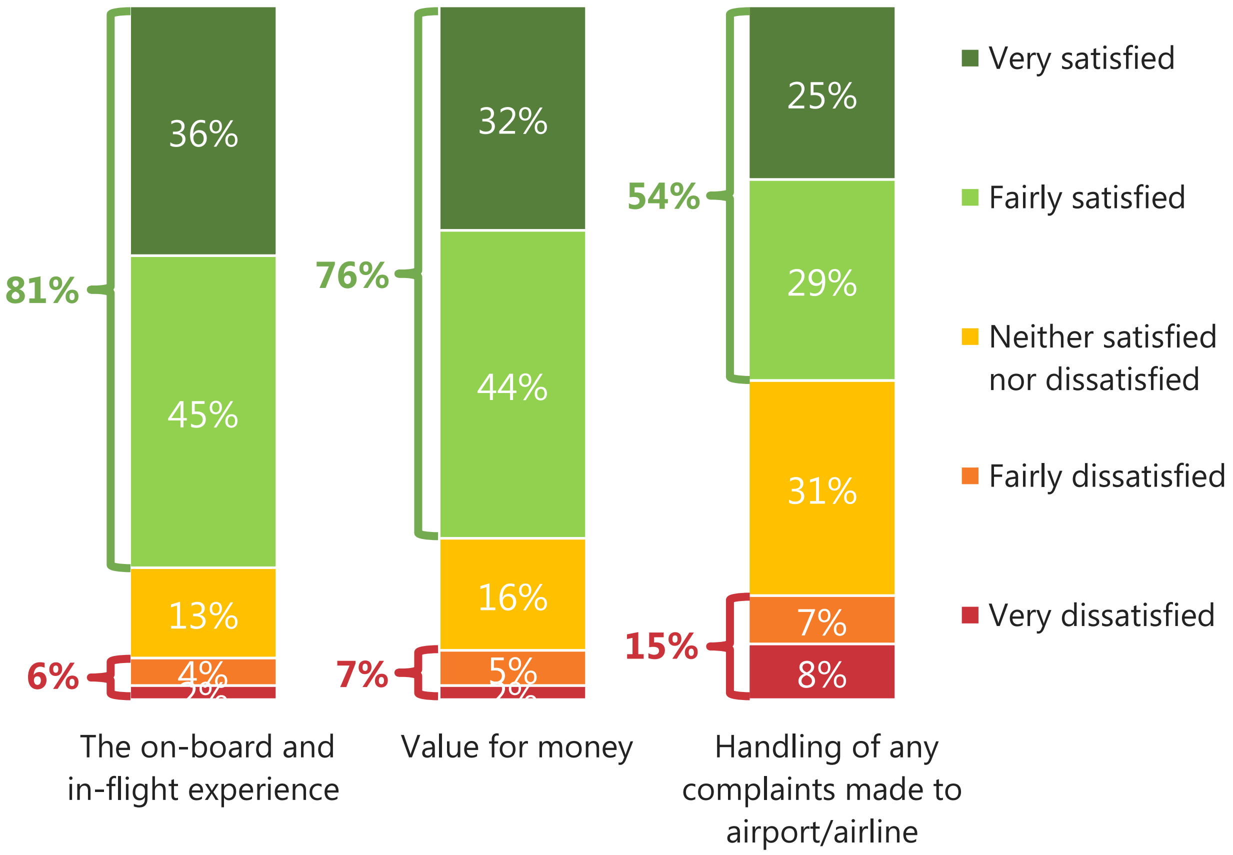
Ipsos Loyalty

Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK (1,815 - 1,896)

Civil Aviation Authority

Last flight: Satisfaction with elements of the journey

The on-board experience is viewed positively and three quarters are satisfied with value for money. Complaint handling is less well received with 15% dissatisfied.



- Eight in ten recent flyers are satisfied with the on-board and in-flight experience. Amongst PRMs with difficulty accessing/using airports or flying satisfaction falls to 72% (12% dissatisfied), whilst those with physical disabilities requiring assistance are less satisfied on this measure as well (73% satisfied, 13% dissatisfied).
- Perhaps reflecting the predominantly low-cost profile of airlines using Stansted, satisfaction with in-flight experience for recent flyers using this airport is lower (71%).
- Participants based in London are less satisfied with both the in-flight experience (73%) and this follows through to value (66% satisfied, 10% dissatisfied).
- Satisfaction with value for money is lower amongst those who last flew long haul (72% satisfied), those who flew from Heathrow (69% satisfied) and also those who flew with children aged 0-17 (71% satisfied, 12% dissatisfied).
- Dissatisfaction with complaint handling is higher among those with assistance needs for either themselves or another member of the party on the last flight (42% satisfied and 33% dissatisfied compared to 55% satisfied and 14% dissatisfied among those with no assistance needs). Those who flew long haul on their last flight are more likely to be dissatisfied with the complaint handling (24%, with 48% satisfied). Those that flew from Manchester airport are more likely to be satisfied with the handling of any complaints (67%, with 11% dissatisfied).

Ipsos Loyalty

Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK (1,868 - 1,904). All who have flown in the last 12 months and made a complaint exc. DK (494)

Civil Aviation Authority

Last flight: Satisfaction with elements of the journey

The grouped large airports are outperforming Heathrow for travelling to the airport and value perceptions.

		Gatwick	Heathrow	Other large airports*	Other airports	
Travelling to and from the airport in the UK	Satisfied	83%	82%	87%	83%	Significantly higher than Heathrow
	Dissatisfied	8%	6%	5%	8%	Significantly higher than Other Large
Airport experience in the UK	Satisfied	85%	81%	85%	78%	Significantly lower than Gatwick and Other Large
	Dissatisfied	7%	5%	6%	9%	
Value for money	Satisfied	74%	69%	79%	78%	Significantly higher than Heathrow
	Dissatisfied	9%	11%	5%	8%	

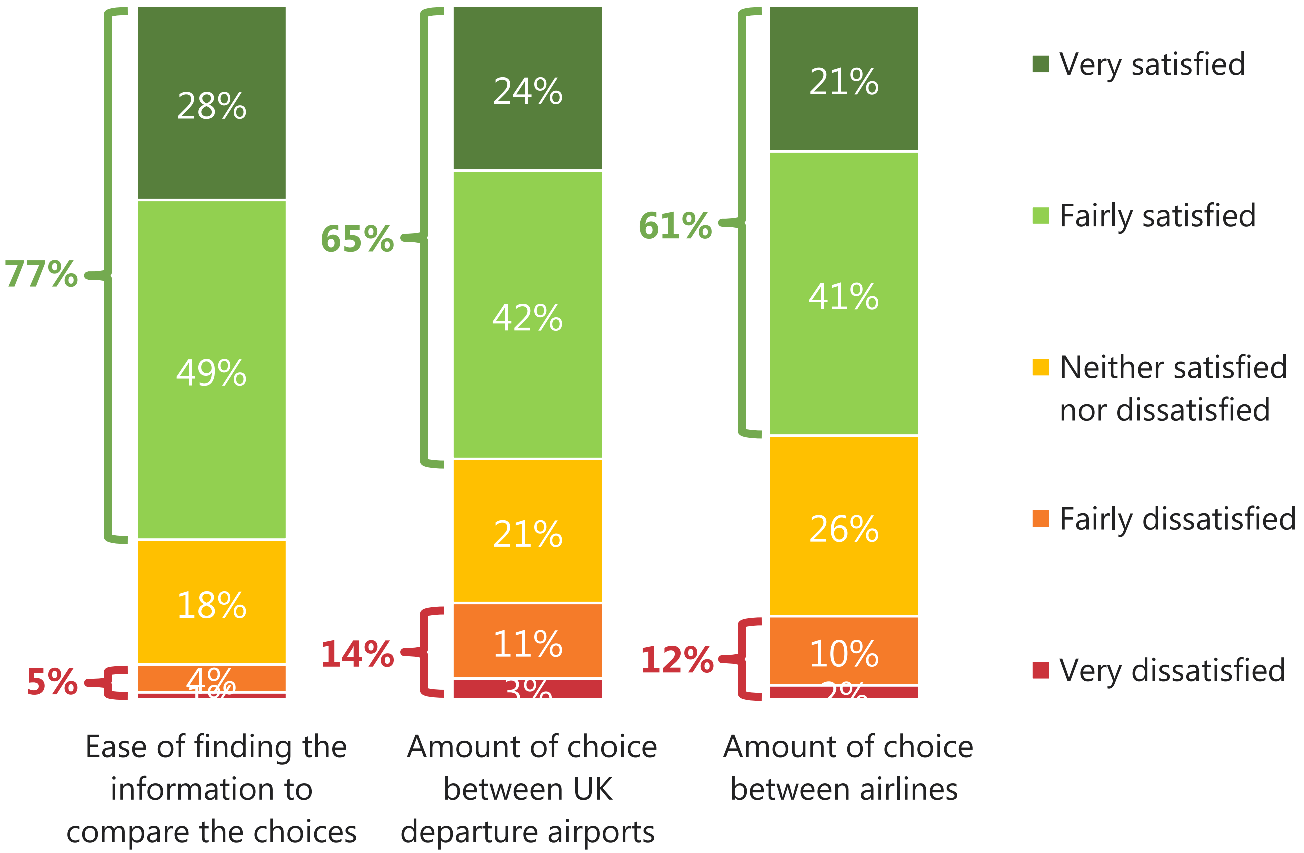
Green text = significantly higher than average

Ipsos Loyalty

Q60. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base exc. DK Gatwick (343), Heathrow (320), *Other large airports (serving over 5m passengers per annum) includes Manchester, Birmingham, Stansted, Edinburgh, Glasgow, Bristol, Luton (773), All other airports (428)

Last flight: Satisfaction with elements of pre-booking

UK consumers are generally satisfied with the ease of finding information to compare flight choices. Whilst most are satisfied with the choice between UK airports and airlines, 14% and 12% are dissatisfied, respectively.



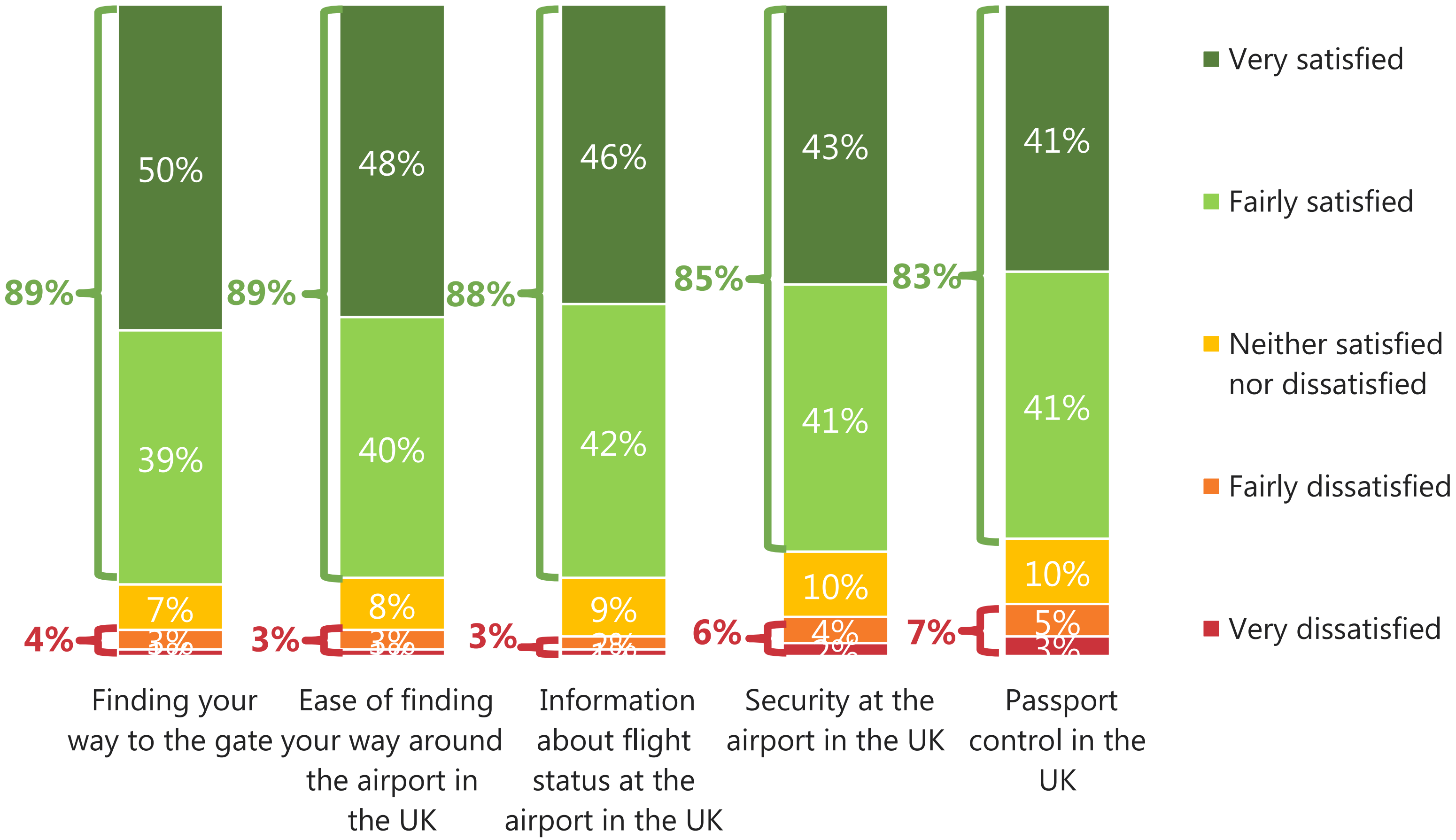
- Perceptions of the pre-booking elements are largely consistent across sub-groups with few notable differences.
- PRMs with a physical condition are less satisfied with the ease of finding information for choice comparison (68% satisfied, 11% dissatisfied). They are also less satisfied with airline choice (53% satisfied, 15% dissatisfied).
- London based participants are more satisfied with airport choice (69% satisfied, 9% dissatisfied) and notably more so than for participants in Scotland (59% satisfied) and South West (58% satisfied). The same can be said for airline choice.
- Airport choice is challenged amongst those whose most recent flight departed from Heathrow (59% satisfied, 15% dissatisfied) and also those who flew long haul (59% satisfied, 16% dissatisfied).

Ipsos Loyalty

Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (1,666 - 1,673)

Last flight: Satisfaction with airport experience

Recent flyers are satisfied with navigation to the departure gate and around the airport in general. Flight status information and security are also performing well.



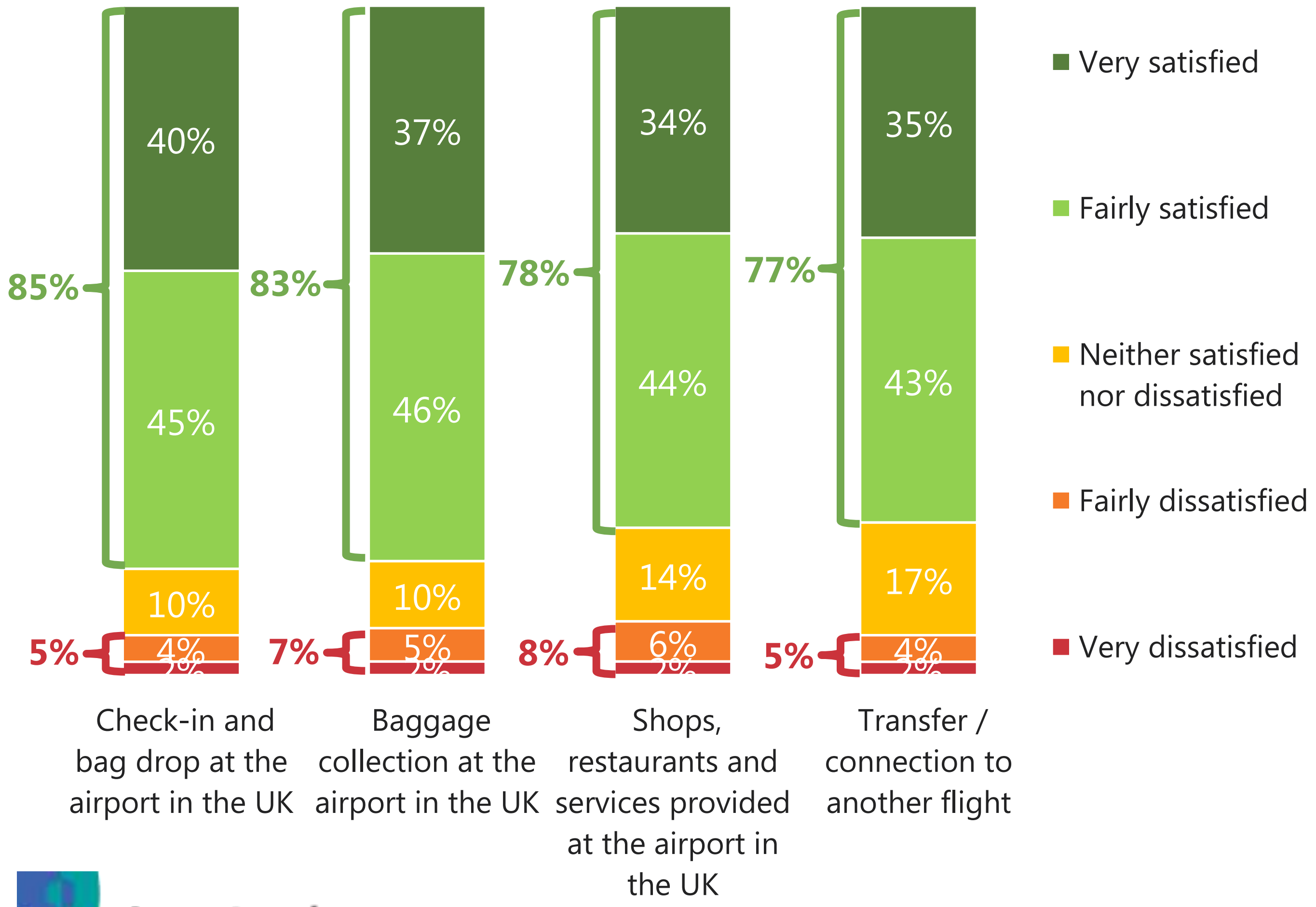
- Navigation around the airport is viewed satisfactorily by almost 9 in ten recent flyers. This is heightened amongst those taking a domestic flight (93% satisfied with finding their way around the UK airport).
  - Other large airports* perform higher than average for finding your way to the gate (91% satisfied). Whereas all other airports** gain higher dissatisfaction here (5%).
- Those who flew from Stansted also record lower satisfaction with both finding your way to the gate (78% satisfied, 9% dissatisfied) and generally finding your way around the UK airport (77% satisfied, 12% dissatisfied).
- Stansted is also challenged with lower satisfaction ratings for flight information provision (79% satisfied, 5% dissatisfied) and passport control (74% satisfied, 14% dissatisfied).
- For those who flew Business Class on their last flight satisfaction for navigation to gate (80% satisfied) and flight information at the UK airport also falls below average (79% satisfied).
- Perceptions of security are reassuringly high amongst consumers. Those who last flew from Edinburgh (76% satisfied, 9% dissatisfied) and those based in Northern Ireland (76% satisfied, 11% dissatisfied) recorded lower satisfaction scores.

Ipsos Loyalty

Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (1,747 - 1,897)
*Other large airports (serving over 5m passengers per annum) includes Manchester, Birmingham, Stansted, Edinburgh, Glasgow, Bristol, Luton , **All other airports excludes Gatwick, Heathrow and other large airports

Last flight: Satisfaction with airport experience

The services available at the airport and transfers/connections are viewed less favourably then some of the other airport experience measures but still achieves satisfaction levels exceeding three quarters of recent flyers.



- Satisfaction levels remain high when considering the check-in and baggage collection at UK airports. Those who last flew in Premium are likely to register lower satisfaction across measures, suggesting that the experience is falling below expectations:
  - Premium check-in and baggage drop; 74% satisfied, 10% dissatisfied
  - Shops, restaurants and services; 69% satisfied, 13% dissatisfied
  - Transfers/connection; 63% satisfied, 10% dissatisfied
- The grouped larger airports perform better for transfers/connections (80% satisfied compared to a lower performing Gatwick, 70% satisfied).
- PRMs are also less satisfied with the transfer/connection (67%) and more dissatisfied (13%)

Ipsos Ipsos Loyalty

Q63. How satisfied or dissatisfied were you with the following elements of your most recent flight? Base: All who have flown in the last 12 months exc. DK and N/A (664 - 1,897)

Civil Aviation Authority

Understanding dissatisfaction with travel experience

Poor service, inconvenience and a lack of communication at the airport and on the aeroplane can lead to dissatisfaction.

Letters of complaint made to [travel company] not responded to after several attempts; thus having used this company for years would certainly think twice about doing so in the future.”

Everything was fine with booking and getting to and from the airport but the service at the airport was poor and the same on the aeroplane.”

The check in desk was hidden away in the airport and wasn't where we were told it would be. No one we asked seemed to know. The meal was not at all good and the flight crew were miserable. I blame the company though and not the staff.”

Painfully long train journey from [UK train station] to [UK airport], which doesn't really get you particularly close to the airport, so further travel from there, followed by typical [airline] cattlecar experience. It's just uninspiring.”

Very poor service in flight: special diet food I ordered was not available and hostess was unhelpful, rude even.”

Long delay. Boarded the plane, and then told to disembark as it was then too late for [destination] to accept the landing. We shouldn't have been boarded to start with!”

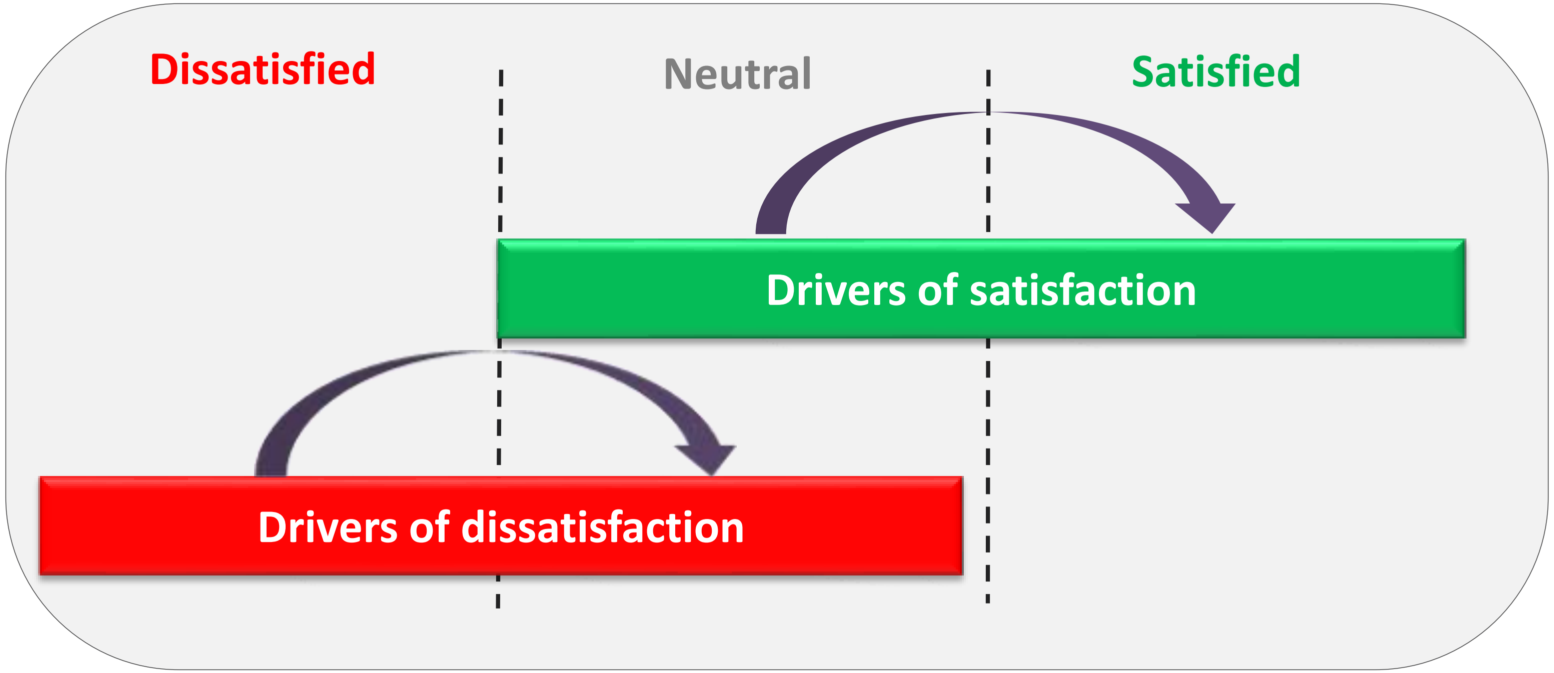
Ipsos Loyalty

Q62. Why were you dissatisfied with the overall travel experience? Please tell us about any issues you had? Base: Dissatisfied recent flyers.

Key drivers analysis: Introduction

What is Key drivers analysis?

Key drivers analysis (logistic regression) looks at the relationship between different measures (e.g. satisfaction with each touch point) and an overall measure (e.g. overall flight satisfaction). By simulating an increase in the scores for each of the touch points, it then identifies which touch points have the biggest impact on the overall measure.



To identify priority areas, we look at the drivers in two ways:

- Managing the drivers of dissatisfaction ('pain') to reduce attrition or 'bad mouthing' of the service
- Managing the drivers of satisfaction ('delight') to strengthen the customer relationship

We will split the sample into groups of customers with different satisfaction levels and use two logit regression models to look at how satisfaction with different attributes drives movement from:

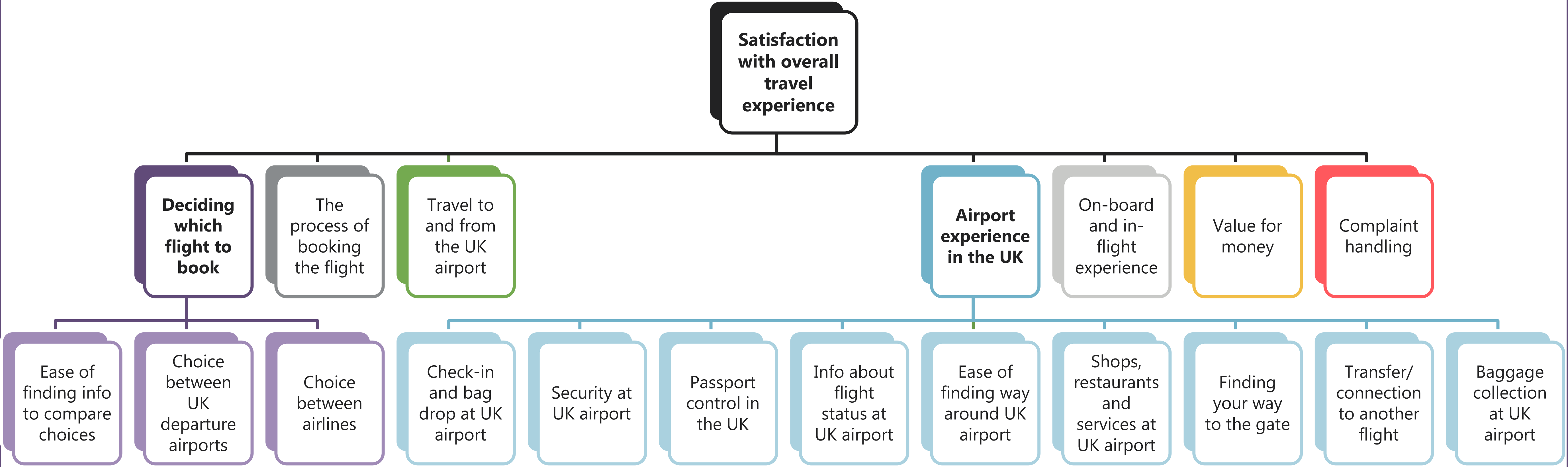
- Dissatisfied to Passives (drivers of pain)
- Passives to Satisfied (drivers of delight)

Ipsos Loyalty

Key drivers analysis: Model

In this research it assesses the impact of elements of the flying experience on overall satisfaction with this experience, using a three stage model:

- Impact of elements of recent flight on overall satisfaction with the last flight
- Impact of elements of deciding which flight to book on satisfaction with this stage overall
- Impact of elements of the airport experience in the UK on satisfaction with this stage overall



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Impact of elements on overall satisfaction

The on-board experience has the highest impact of the attributes measured on overall satisfaction with the flying experience, followed by a group of comparable measures covering the airport, value, decision making and booking.

Impact of elements of journey on overall satisfaction with last flight

- The on-board experience has the greatest impact on overall flight satisfaction of all the attributes measured.
- As shown on the bars these elements are greater drivers of satisfaction than dissatisfaction.
- There is little differentiation between the airport experience, value for money, decision and booking process, all have comparable impact on overall journey satisfaction.
- The impact of complaint handling is relatively small as it affects just a quarter of recent flyers. However, the balance in terms of driving satisfaction and dissatisfaction is fairly even. This suggests that if a complaint is well managed it can increase overall satisfaction, whilst if it is poorly managed it can drive down overall satisfaction.
- Value emerges as the key driver amongst PRMs followed by the flight experience.

Ipsos Loyalty

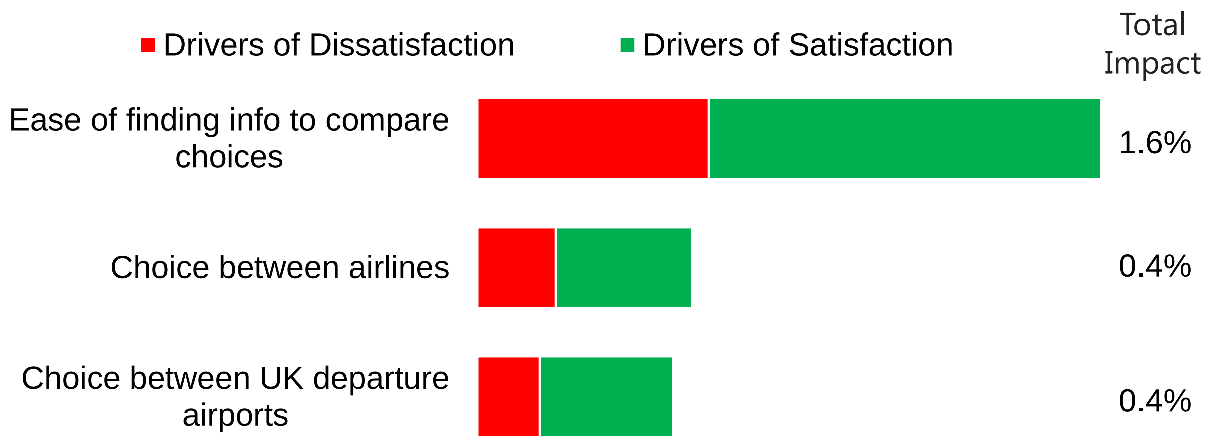
The length of the bars reflects the impact on overall satisfaction with the flying experience. This refers to the % increase in the mean overall satisfaction with the flying experience score based on a simulated 5% increase in the mean score of a particular driver. Impact scores are relative to the measures included within the survey.

Civil Aviation Authority

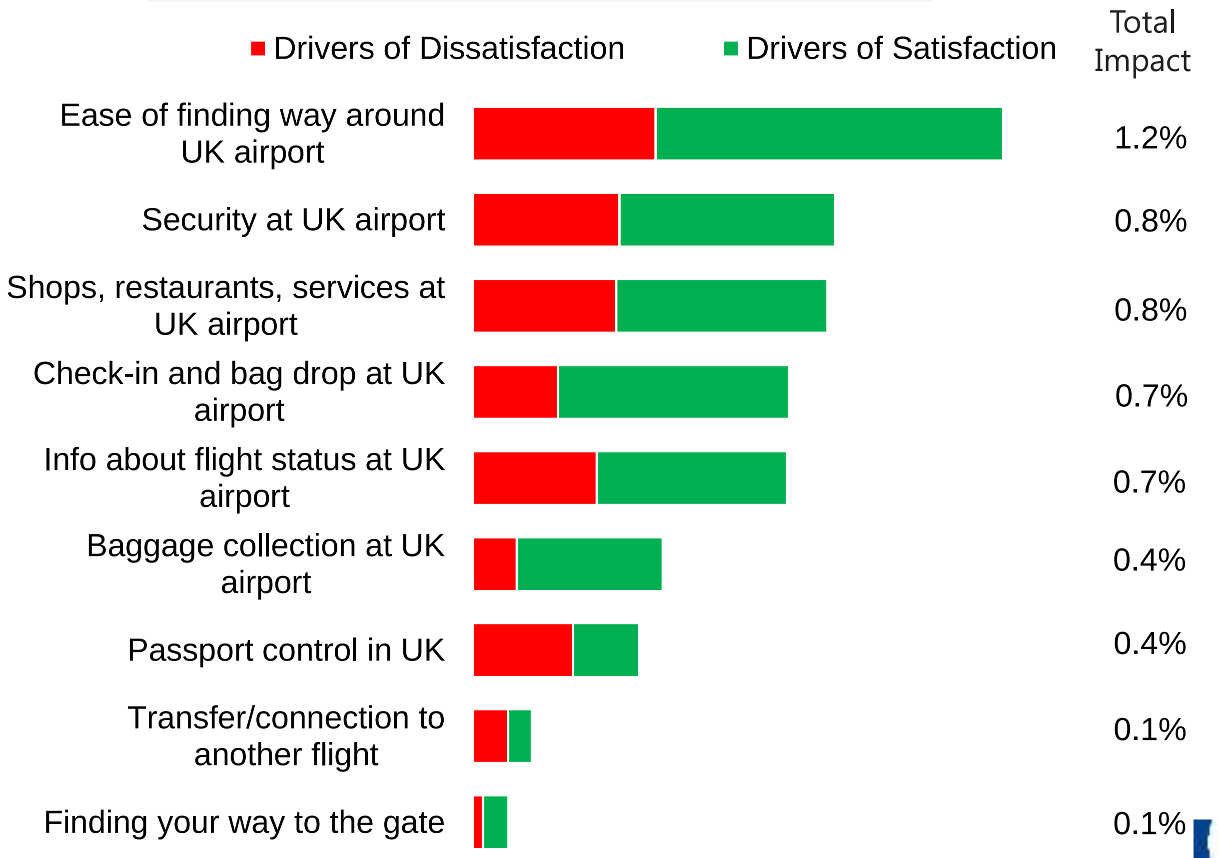
Impact of elements of last flight on overall satisfaction

Looking below the top level drivers, ease of finding information to compare choices is key to deciding flight and ease of finding way around the airport is of greatest impact on satisfaction with the airport experience.

Impact of elements on flight decision



Impact of elements on UK airport experience



Ipsos Loyalty

The length of the bars reflects the impact on overall satisfaction with the flying experience. This refers to the % increase in the mean overall satisfaction with the flying experience score based on a simulated 5% increase in the mean score of a particular driver. Impact scores are relative to the measures included within the survey.

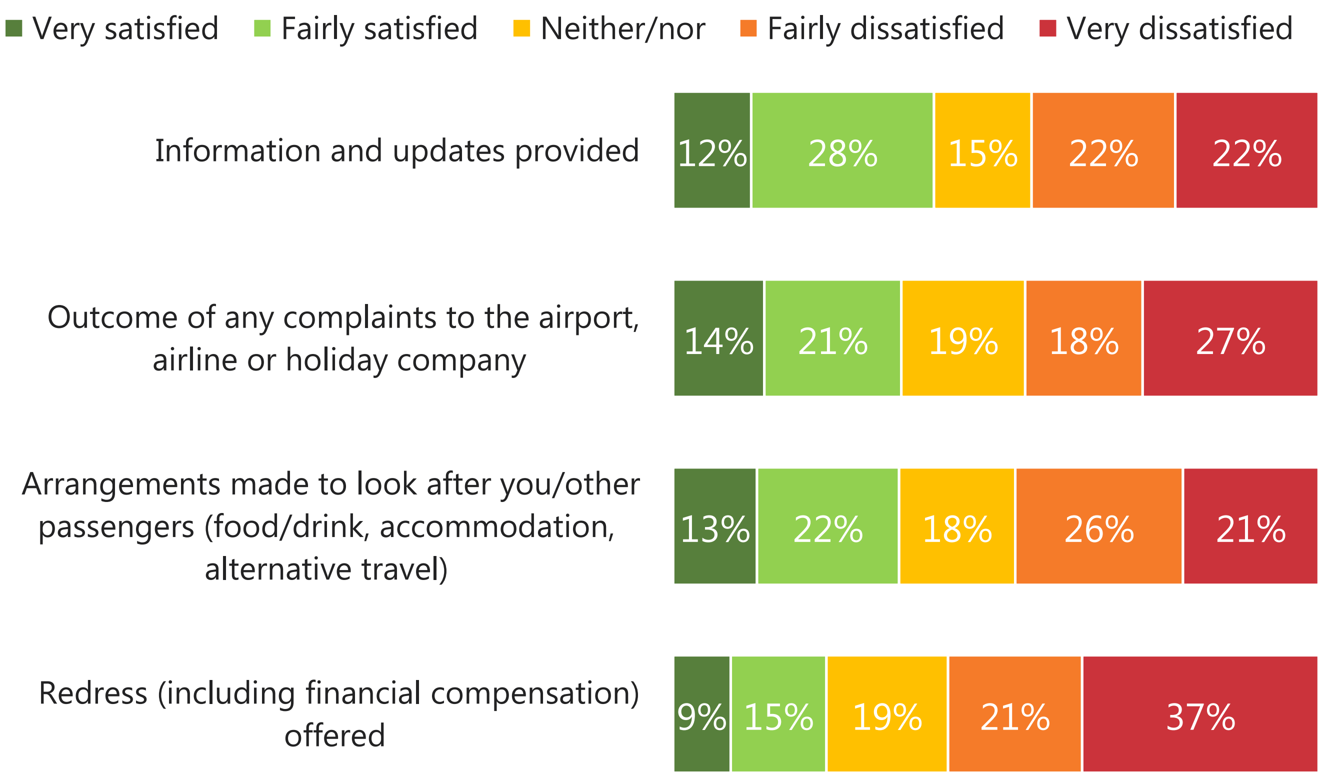
Last flight: Travel disruption

One in seven say they experienced disruption on their most recent flight, and the main disruption faced was a flight delay. Satisfaction with handling of the problem is quite low, in particular with redress offered as a result of the issue.

Experience of travel disruption and satisfaction with problem handling

14% Experienced disruption on their most recent flight

Disruption experienced	% experienced	*Satisfaction with problem handling* – *Satisfied*	*Dissatisfied*
Significant flight delay of 2 hours or more	5%	*37%*	*50%*
Loss or damage to luggage	3%	*31%*	*53%*
Flight cancelled	1%	*(Base sizes too low to report)*	
Flight diverted	1%		
Airline refused to let you board and you got to the gate before it closed	1%		
Made to disembark aeroplane through no fault of your own	1%		
Other travel problem	5%	*25%*	*58%*



Ipsos Loyalty

Q80. During the most recent journey, did you experience any of the following types of travel problem? Base: All who have flown in the last 12 months (1,911) | Q81. Satisfaction with the handling of each travel problem. Base: All who have flown in the last 12 months and experienced a travel problem (62-102) | Q83a. How satisfied or dissatisfied were you with the following aspects in terms of your flight problem? Base: All who have flown in the last 12 months and experienced any travel problem exc. DK (125-233)

Civil Aviation Authority

Understanding dissatisfaction with handling of problems

Some of the reasons given for dissatisfaction reference staff, communication and more straightforward refunds.

Not enough staff to deal with the problem (baggage staff went on strike). Little or no information available as to what was happening."

Yes, the staff did not want to know about my issue and even took measures to make it more awkward."

There was no information provided about the delay - the information about the flight/boarding time and gate just simply didn't appear at the screens for over an hour after the scheduled time, and there was no explanation offered afterwards."

We had to pay more money to be able to get home. Which then after complaining, did not get refunded."

We arrived back at midnight and it was hell trying to find the local air bus to take us back to our car. It took us 50 minutes to get out of the airport, which annoyed us so much."

Left waiting for wheelchair at gate after 30 mins decided to make our own way to catch resort transfer decided against assistance on the way back for my 85 year old mother."

Ipsos Loyalty

Q82. Why were you dissatisfied with the way your flight problem(s) was handled? Base: Recent flyers who were dissatisfied with how problem was handled.

Experience of PRM

Ipsos Loyalty

Experience of PRMs - summary

While many PRMs do have access to flying, their disabilities/health conditions still present barriers to flying for some. When PRMs do fly, the assistance received is positively rated, however there is room for improvement in perceptions of future travel for this group

- **There are differences in flight behaviour between PRMs and UK consumers overall. One in ten PRMs have never flown compared to 6% national average.**
  - Health and disability issues affecting the airport (30%) and flight experience (26%) feature heavily among the barriers to flying among PRM but the most commonly cited barrier remains cost (41%, in line with consumers overall at 42%).
  - Compared to non-PRM participants who have not flown recently, getting to the airport is a significant barrier. This stage of the journey is difficult for six percent of PRM overall, and nine percent of those who require assistance, compared to three percent of non-PRM.
- **Satisfaction with assistance for PRM is high across the journey.**
  - Seven in ten (69%) PRM who require assistance request it before travelling to the airport and the overall perception of pre-booking the assistance is positive (89% satisfied).
  - However, PRMs are more likely to express dissatisfaction when it comes to flight transfers.
- **Generally PRMs have positive expectations about future experience; that said, there is a notable minority who are less confident about their future experience.**
  - Almost six in ten (59%) believe that they will have the opportunity to ask for assistance when they book, rising to 66% of those who required assistance on their last flight.
  - However, just under a quarter (23%) do not think they will be provided information about assistance ahead of the journey and the same proportion think that their assistance needs will not be understood and passed on to the airport and airline.
  - Almost one in five (18%) disagree that there will be opportunity to ask for assistance when making the booking and the same proportion disagrees that they will be given the assistance needed during the journey.
  - Those with non-physical disabilities are least likely to feel that their needs will be met during the journey. Only 40% of this sub-group thinks their needs will be met, compared to 56% of all PRMs.

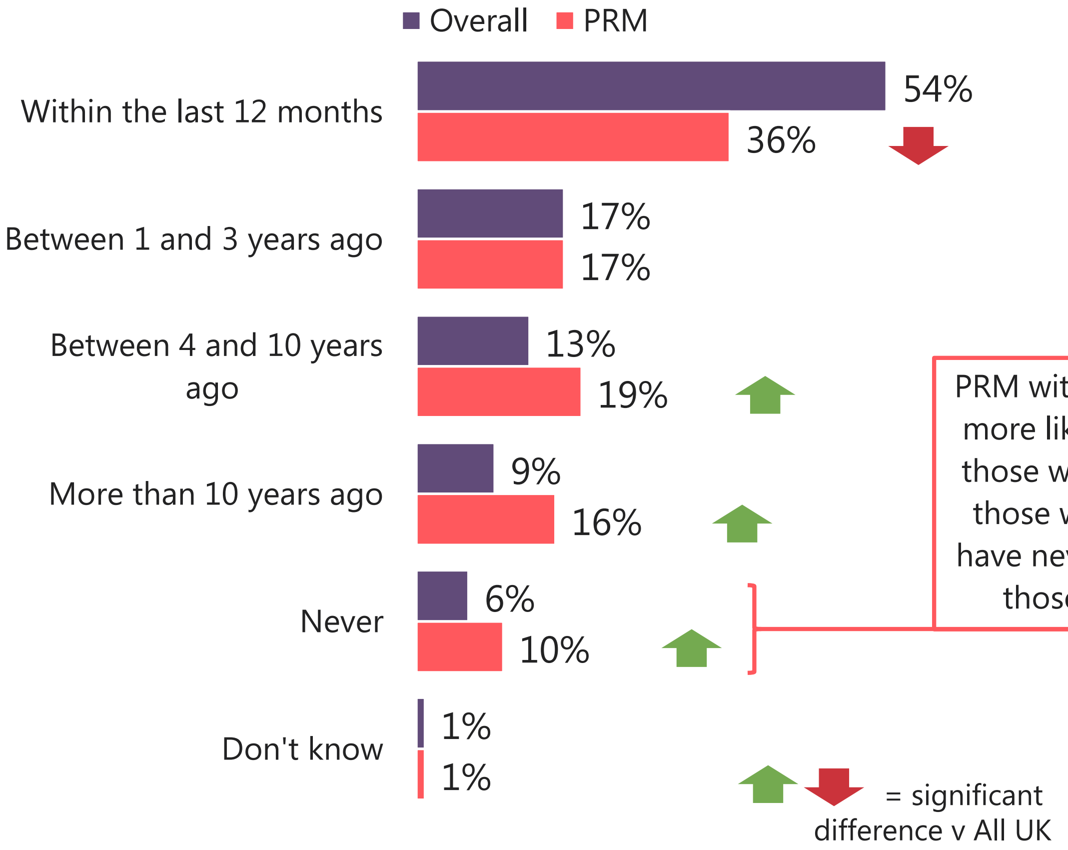
Ipsos Loyalty

Civil Aviation Authority

PRM: Flying behaviour overview

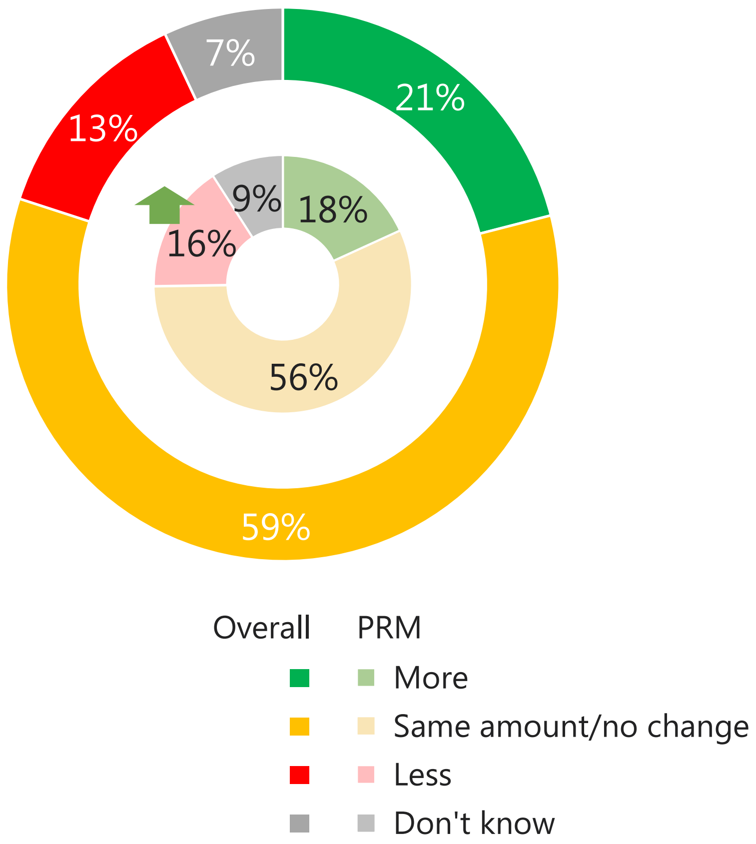
PRM are less likely to have flown recently and more likely to have never flown than UK consumers overall.

Last flown from a UK airport



PRM with non physical disabilities are more likely to have never flown than those with physical disability. 14% of those with non-physical disabilities have never flown, compared to 9% of those with physical disabilities.

Flying frequency in next 12 months



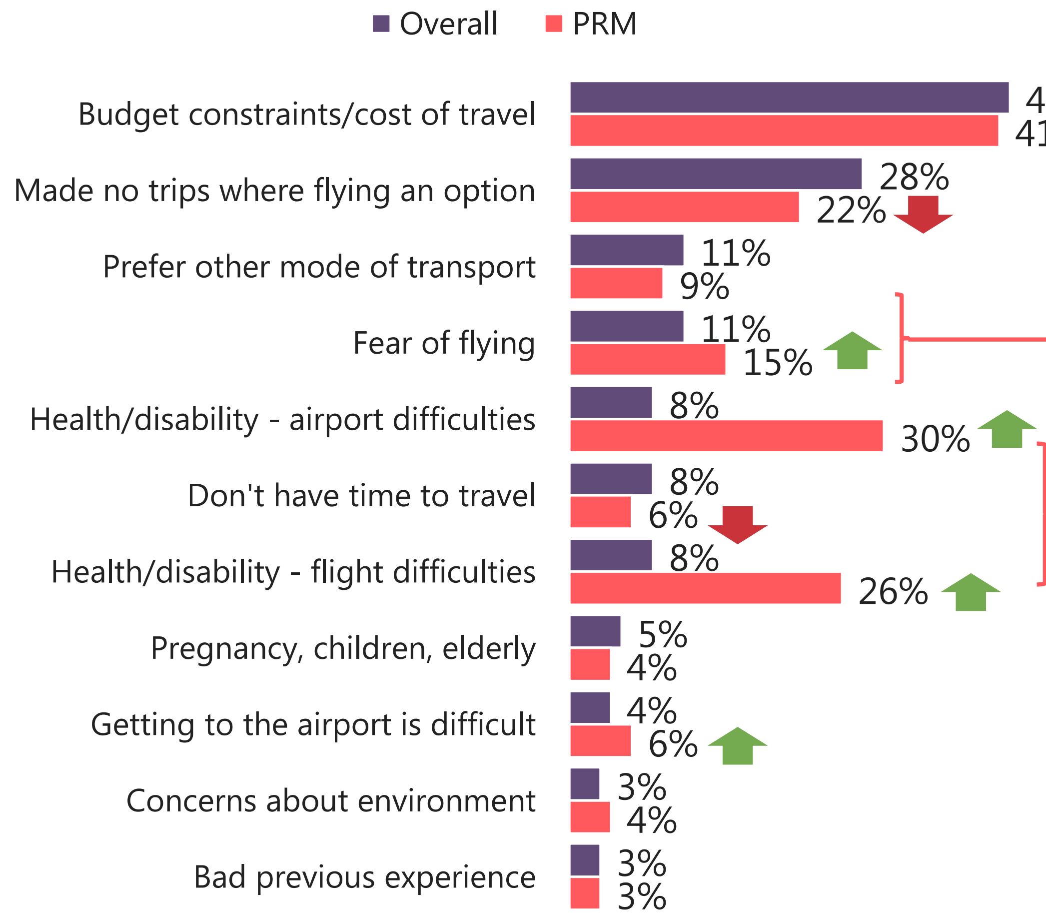
Ipsos Loyalty

Q10. When was the last time you flew from a UK airport?, Q13. In the next 12 months, do you expect that you will fly more, the same amount or less compared to now? Base: All participants (3,507), All PRM (607)

PRM: Flying behaviour overview

Fear of flying, health/disability issues and perceived difficulty getting to the airport are more likely to be barriers to flying for PRMs compared to UK consumers overall

Barriers to flying
(Mentions above 2%)



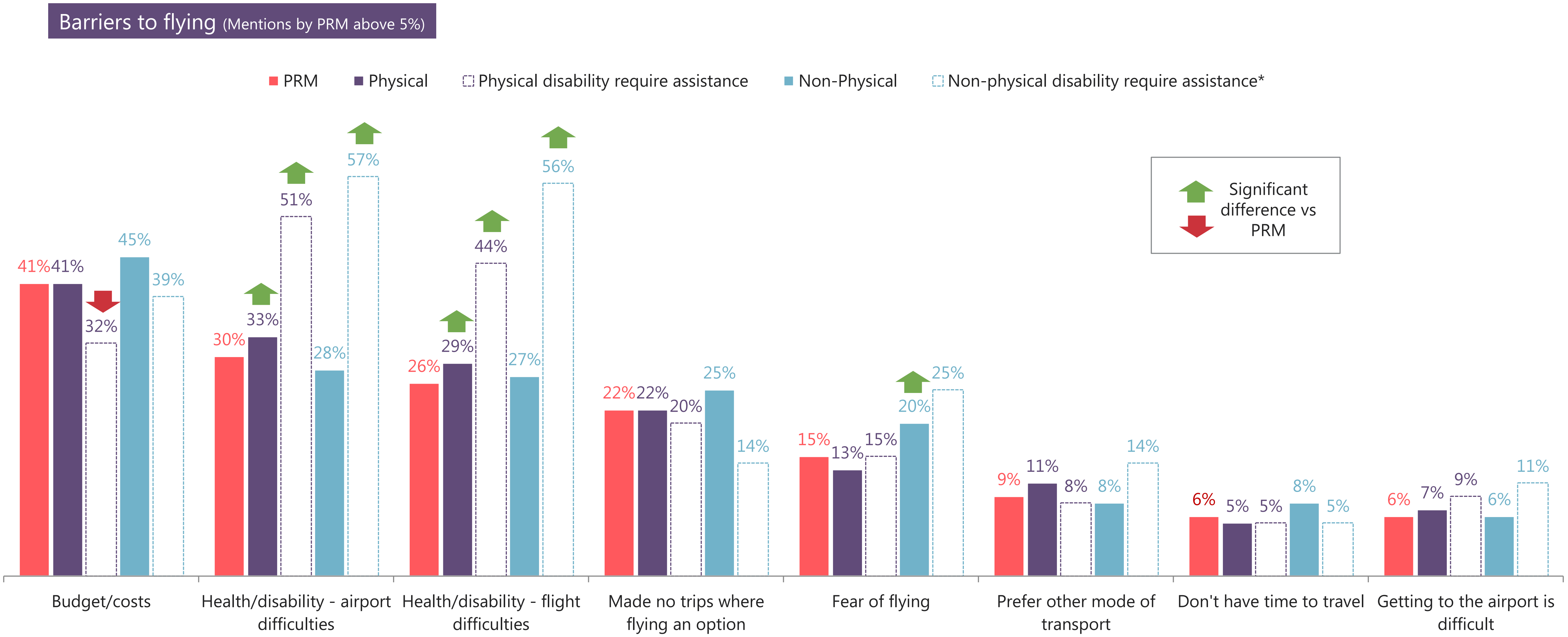
36% of PRM mention health/ disability

20% of PRMs with non-physical disabilities highlight this as a barrier to flying, compared to 13% of those with physical disabilities and 11% of all participants.

More of those with physical disabilities (41%) than those with non-physical disabilities (34%) mention that their health/disability is the reason that they haven't flown recently. Those with non-physical disabilities indicate that the main barrier is a fear of flying.

Q20. Why have you not flown? Base : All who have not flown in the last 12 months (1,594), PRM (383)

PRM: Barriers to Flying by segment



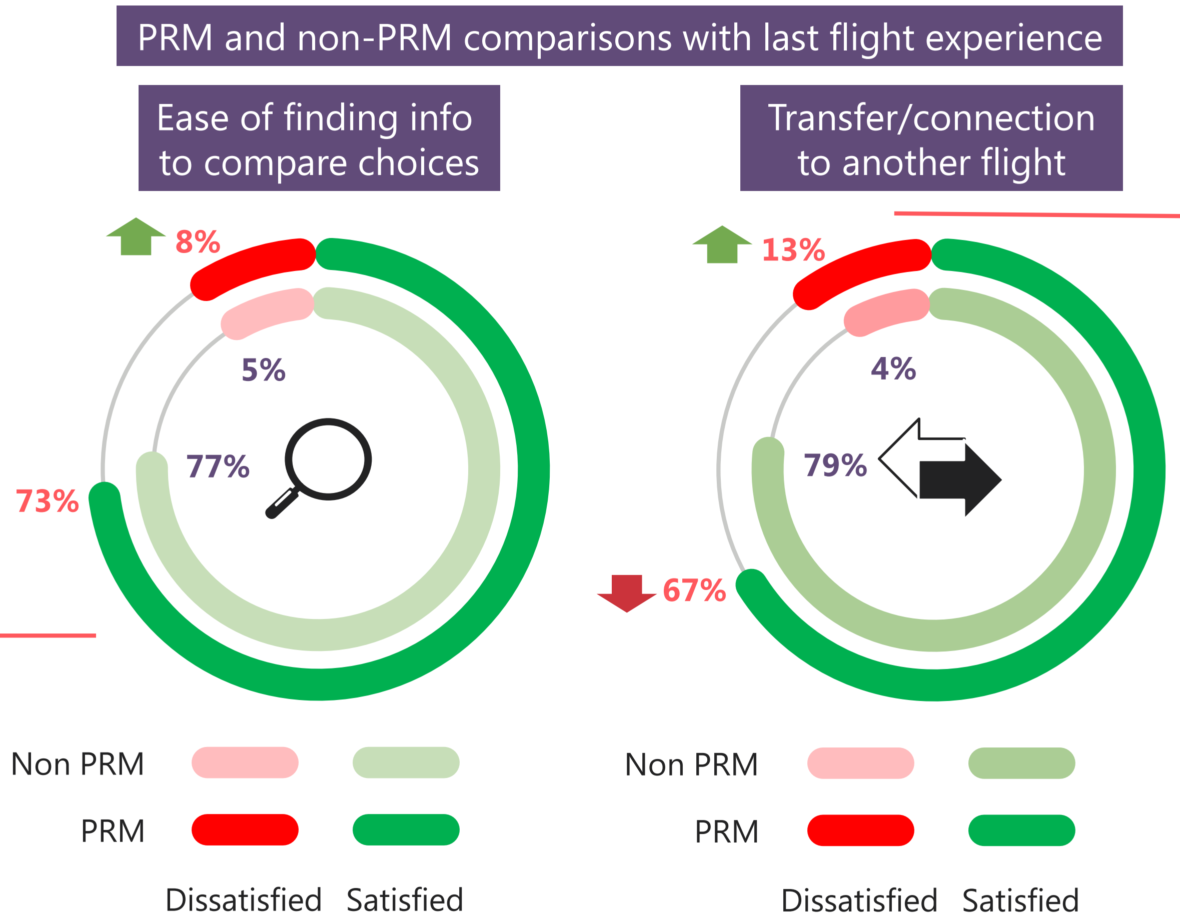
Ipsos Loyalty

Q20. Why have you not flown? Base : those who have not flown in the last 12 months: PRM (383), non-PRM (1193), physical disability (272), non-physical disability (171), physical disability requiring assistance (128) and non-physical disability requiring assistance (56).

PRM: Differences compared to non-PRMs

PRMs are more likely than non-PRMSs to be dissatisfied with the ease of finding information to compare choices and with flight transfers.

PRM with physical disabilities find comparing choices more difficult than other subgroups. 68% of these are satisfied with the ease of finding information to compare choices, lower than overall PRM and non-PRM groups.



Dissatisfaction is highest amongst those with physical disabilities. 15% of this group are dissatisfied with their experience of transferring to another flight.

= significant difference v PRM

Ipsos Loyalty

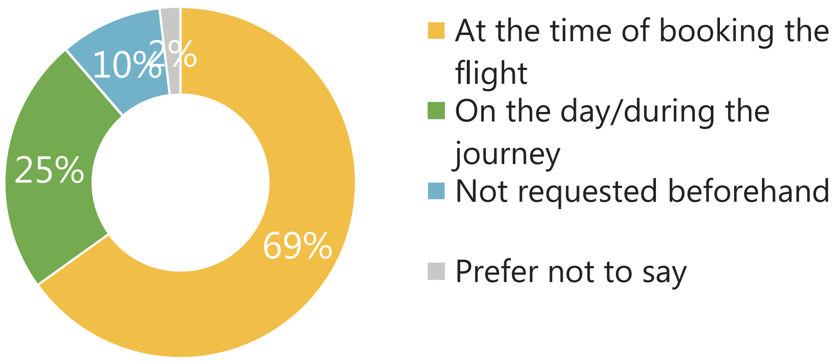
Q63. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied were you with the following elements? Base: All who have flown in the last 12 months, Ease of comparison: All (1,671), PRM (189); Transfer All (664), PRM (64)

Satisfaction with assistance received

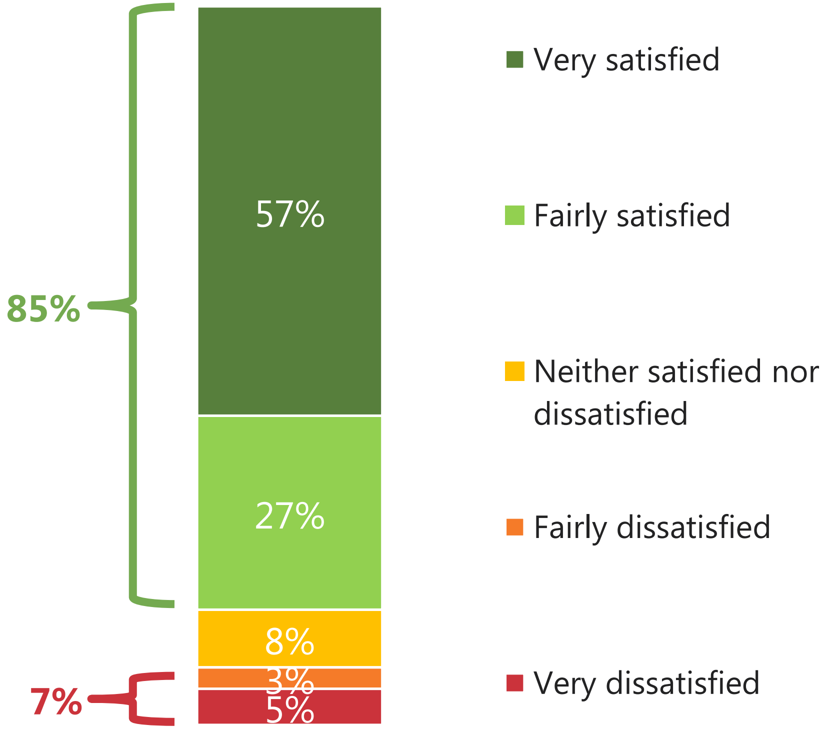
PRMs that need assistance typically request it when booking the flight and report high levels of satisfaction with the assistance.

A member of the travelling party required assistance for **6%** of those who flew in the last 12 months

How assistance was requested?



Overall satisfaction with assistance received



Ipsos Ipsos Loyalty

Q70. During this recent flight did you actually request assistance either from the airport, airline or holiday company? Base: All PRM who have flown in the last 12 months and required assistance, exc. DK and N/A (123). Q71. How satisfied or dissatisfied were you with the assistance you received overall? Base: All PRM who have flown in the last 12 months who required and requested assistance exc. DK and N/A (109)

Civil Aviation Authority

Understanding dissatisfaction with the assistance

From [overseas airport] we had fantastic service but when we arrived to [UK airport] there was no assistance at all. They were very rude saying we didn't book it in advance."

When I enquired about assistance from the airport/airline I got no reply."

Despite informing them I was a wheelchair user and needed assistance getting on the plane at the time of booking and also on the day, they still assumed I could walk onto the plane which delayed us and left us hanging around waiting for ages while they ran around aimlessly trying to figure out what to do, it didn't seem like they had much of a clue."

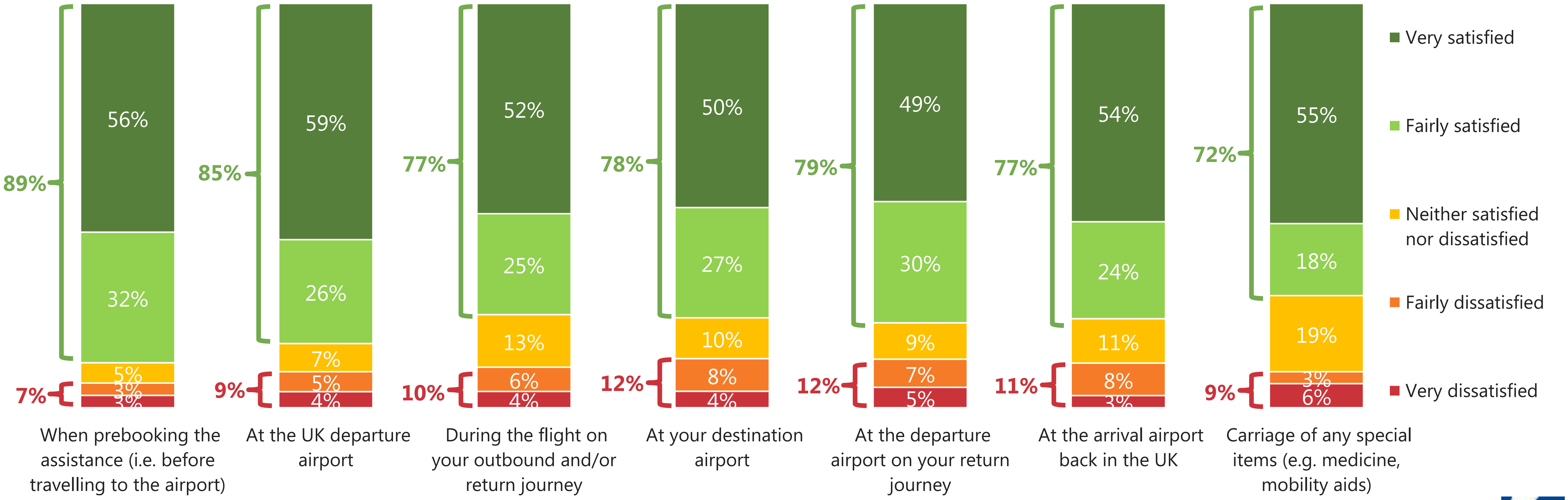
Seating arrangements made it difficult to use toilets. No help with climbing steps to access plane. All printed booklets from safety to menus were not designed to be used by severe sight impaired/blind."

Ipsos Loyalty

Q72. Why were you dissatisfied with the assistance? Please tell us about any issues you had? Base: Dissatisfied recent PRM flyers who requested assistance.

Satisfaction with assistance at each point in the journey

Satisfaction with assistance at all parts of the journey is high, in particular when pre-booking and at the UK departure airport.

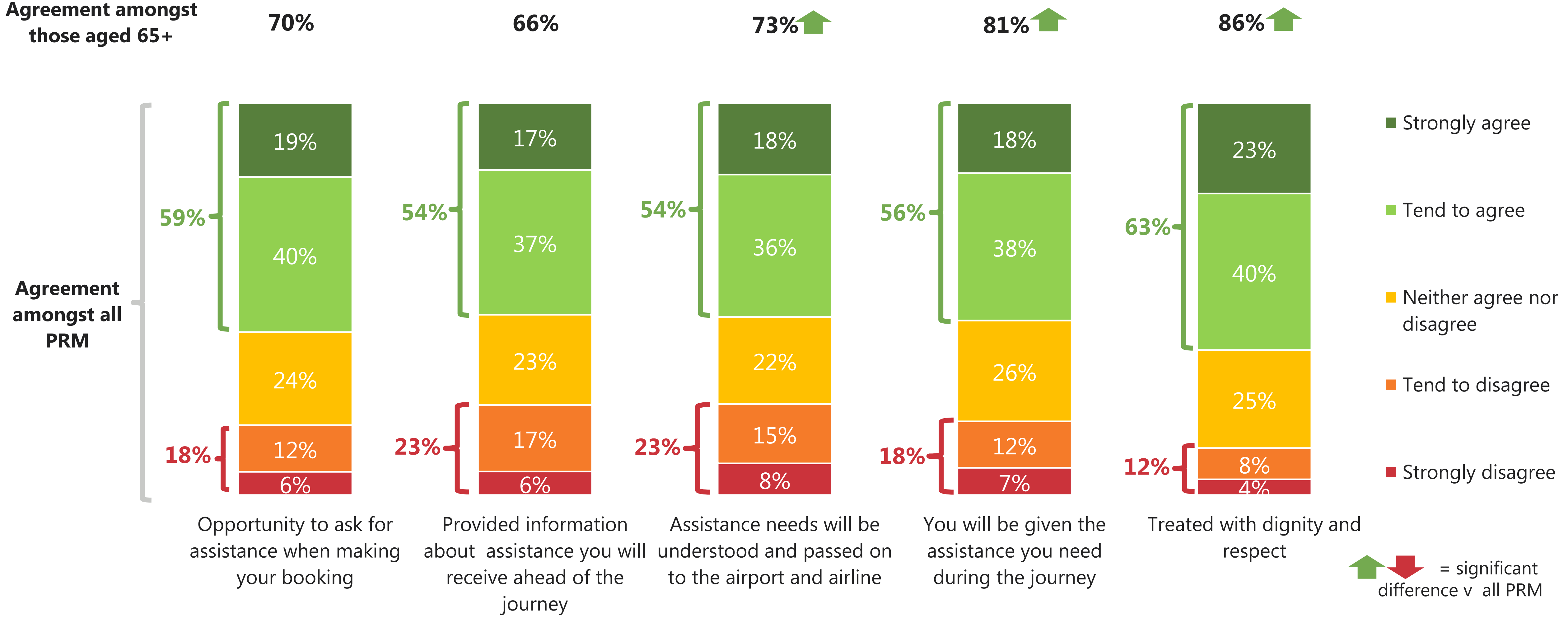


Ipsos Loyalty

Q73. How satisfied or dissatisfied were you with the assistance you received at each of these points in the journey? Base: Participants who have flown in the last 12 months and required and requested assistance, excl. DKs and NAs (69-105).

PRM expectations for future travel

Generally PRM passengers expect their disability or health conditions will be dealt with positively when they travel in the future. The most positive group is the 65+ age group, who are more likely to agree that assistance needs will be met at multiple touchpoints.

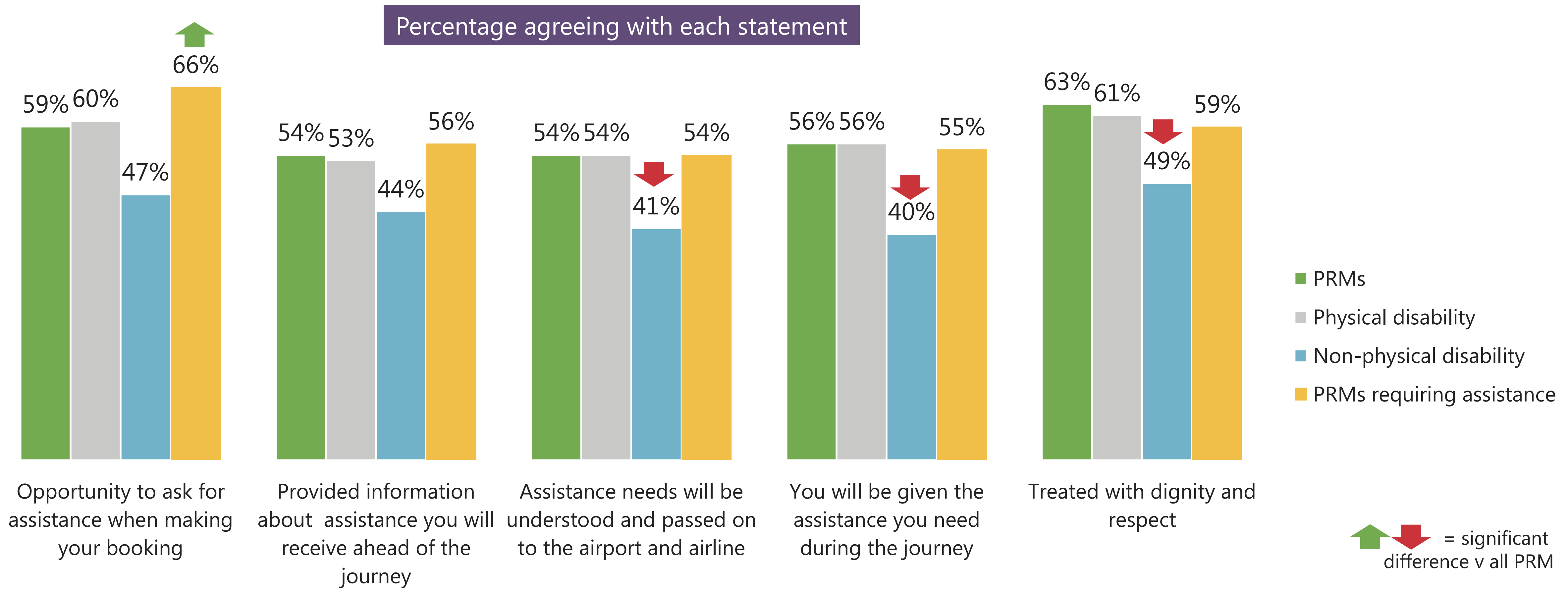


Ipsos Loyalty

Q90. To what extend do you agree or disagree with each of these statements about how your disability or health condition needs will be dealt with if and when you next choose to fly? Base: PRM and flown in last 10 years, excl. DKs and NAs (187-201); PRM and flown in last 10 years aged 65+, excl. DKs and NAs (47-48).

PRMs with physical and non-physical disabilities

PRM passengers with non-physical disabilities are less positive about the assistance they will be given in the future. They are less likely to feel that they will be given the assistance required during the journey. Conversely, those who require assistance are more positive.

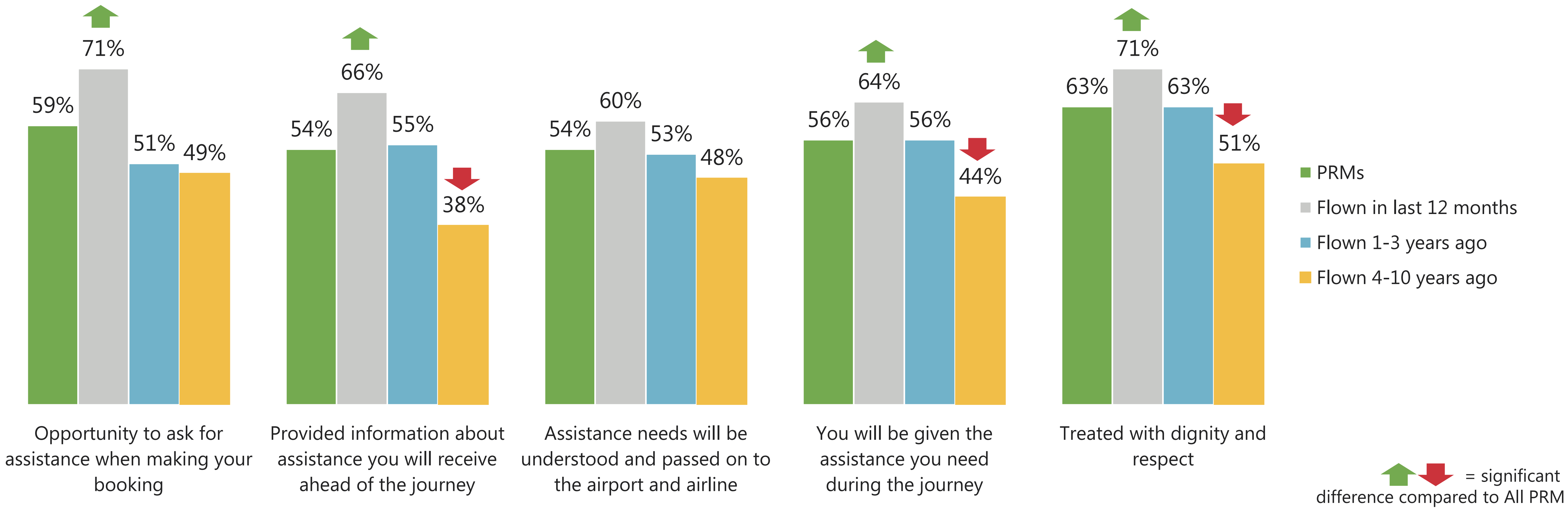


Q90. To what extend do you agree or disagree with each of these statements about how your disability or health condition needs will be dealt with if and when you next choose to fly? Base: PRM and flown in last 10 years, excl. DKs and NAs (187-201); PRM with physical disability, excl. DKs and NAs (148-159); PRM with non-physical disability, excl. DKs and NAs (47-55); PRM requiring assistance (128-134).

Ipsos Loyalty

PRMs with recent flight experience

PRM passengers who are recent flyers are more optimistic that their assistance needs will be catered for when flying in the future. Across the journey, those who have flown in the last twelve months are more likely to have positive future expectations.

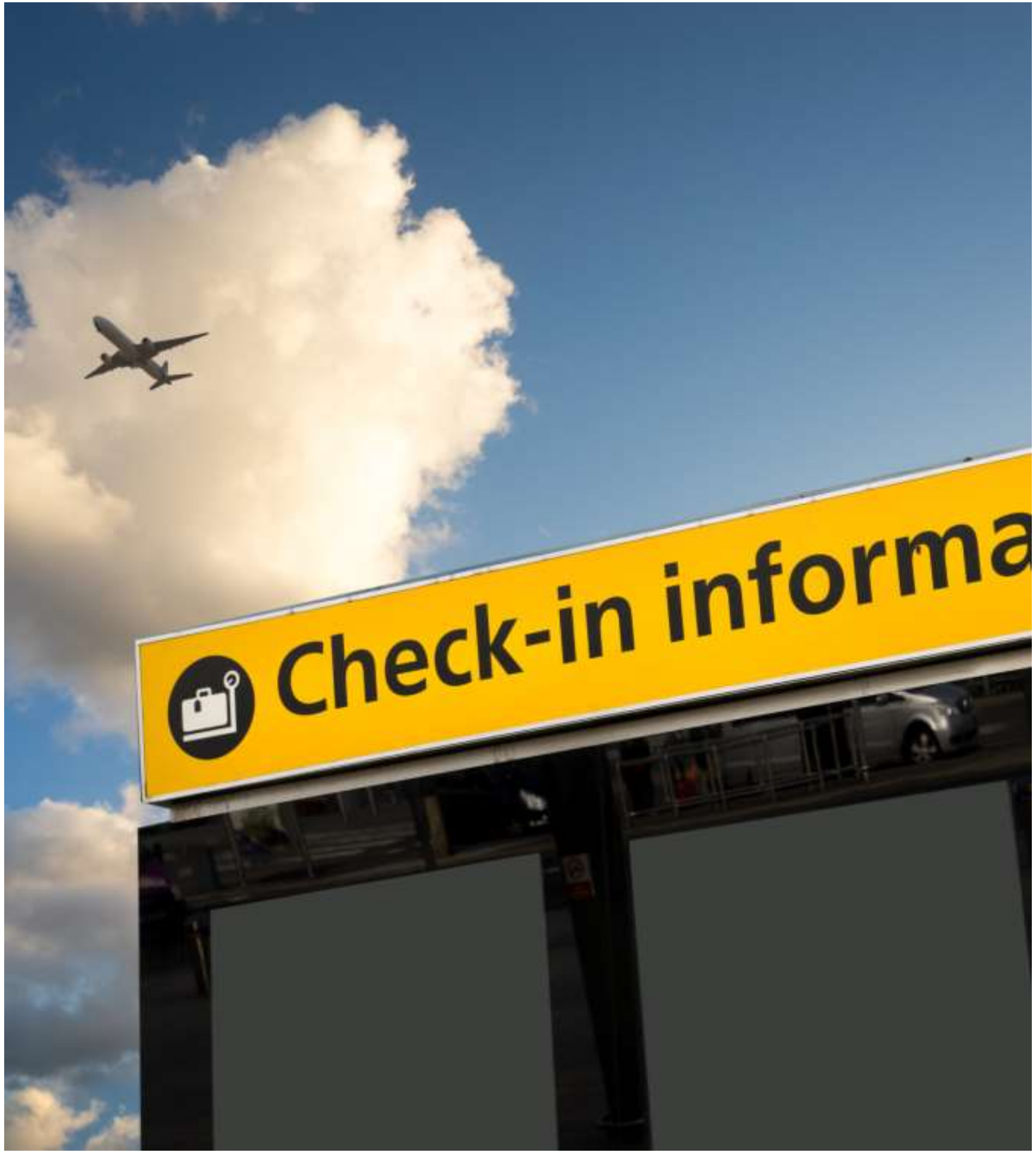


Q90. To what extend do you agree or disagree with each of these statements about how your disability or health condition needs will be dealt with if and when you next choose to fly? Base: PRM and flown in last 10 years, excl. DKs and NAs (187-201); PRM flown in last 12 months, excl. DKs and NAs (77-84); PRM flown in last 1-3 years, excl. DKs and NAs (50-56); PRM flown in last 4-10 years (59-62).

Ipsos Loyalty

Priorities when choosing a flight

Ipsos Loyalty



An Introduction to Max Diff

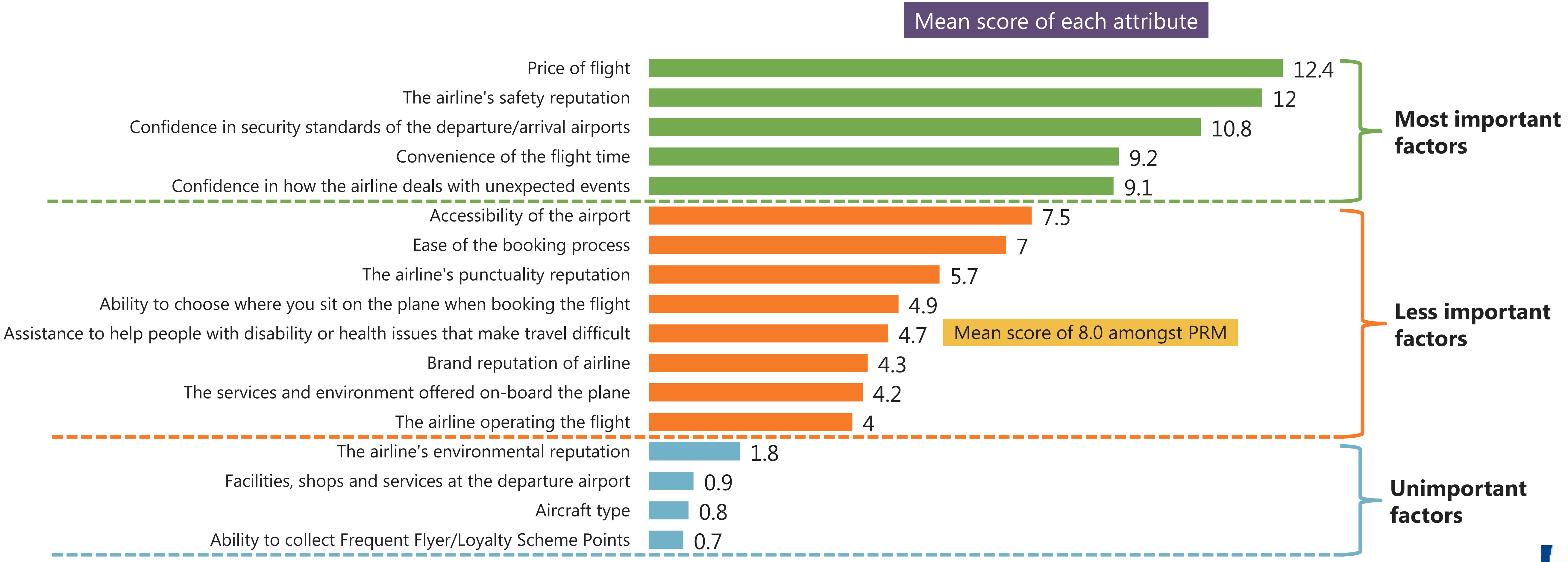
- Max Diff is a prioritisation exercise that is highly effective at sorting through a wide number of different options in order to establish what consumers see as important.
- The main advantage of Max Diff is that it offers greater differentiation of results than can be obtained through more standard rating or importance scale questions because participants are required to choose between different options, all of which could potentially be "quite important."
- This exercise allowed us to rate the importance of seventeen different elements that contribute to decision-making around booking flights. Max Diff has enabled us to establish what is important to consumers overall, and a number of different sub-groups, when they are booking flights.
- The seventeen elements are broken down into several screens, each displaying five aspects. Participants are asked to rate what is most important and what is least important when they are deciding on which flights to book.
- The results are combined across all seventeen elements and each factor is scored depending on how favourably it is seen by participants, allowing a clear order of prioritisation to be established.

Ipsos Loyalty

Civil Aviation Authority

Relative importance when booking flights

The most important aspect when flights are booked is price. This is chosen ahead of the airline's safety reputation 57% of the time, and the the ability to collect loyalty scheme points, the least important aspect, 97% of the time.

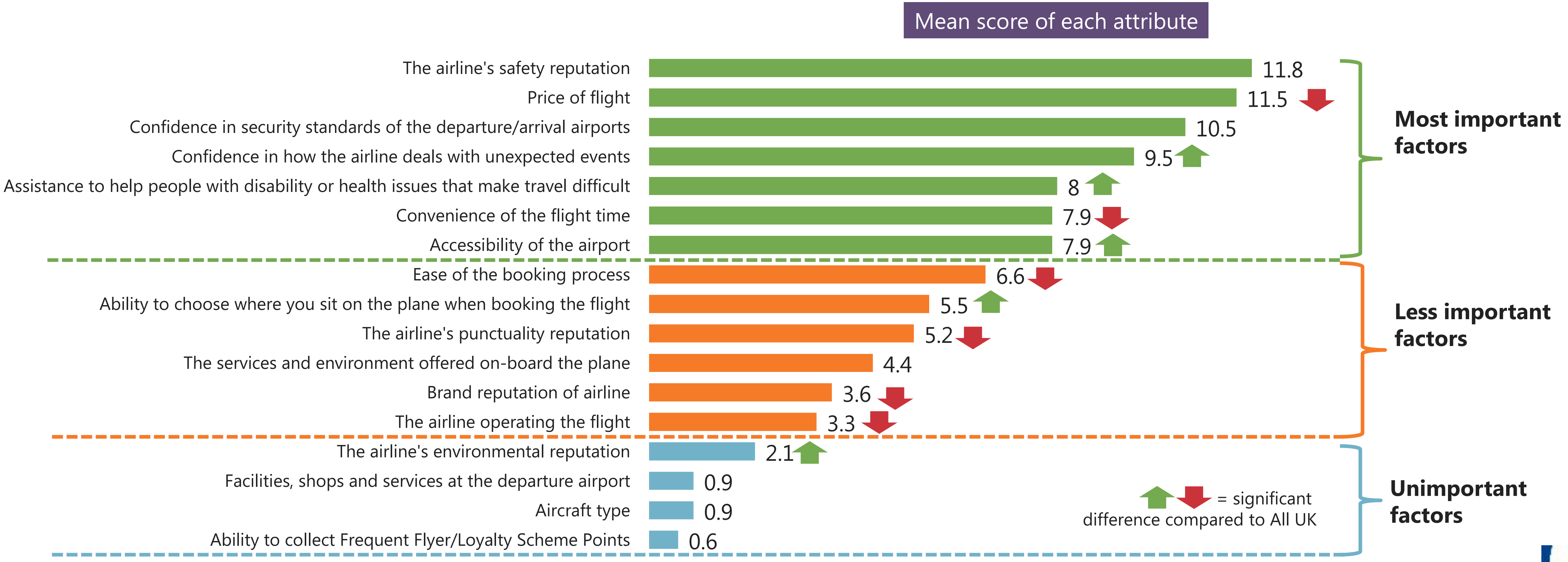


Ipsos Loyalty

Q120. Max Diff exercise: For each screen tell us which one aspect is most important to you when choosing a flight and which is least important to you. Base: All online participants (3,007).

Relative importance when booking: PRM

The assistance provided to help people with a disability is much more important to PRMs than UK consumers. Choosing where to sit on the plane is also slightly more important for this group.

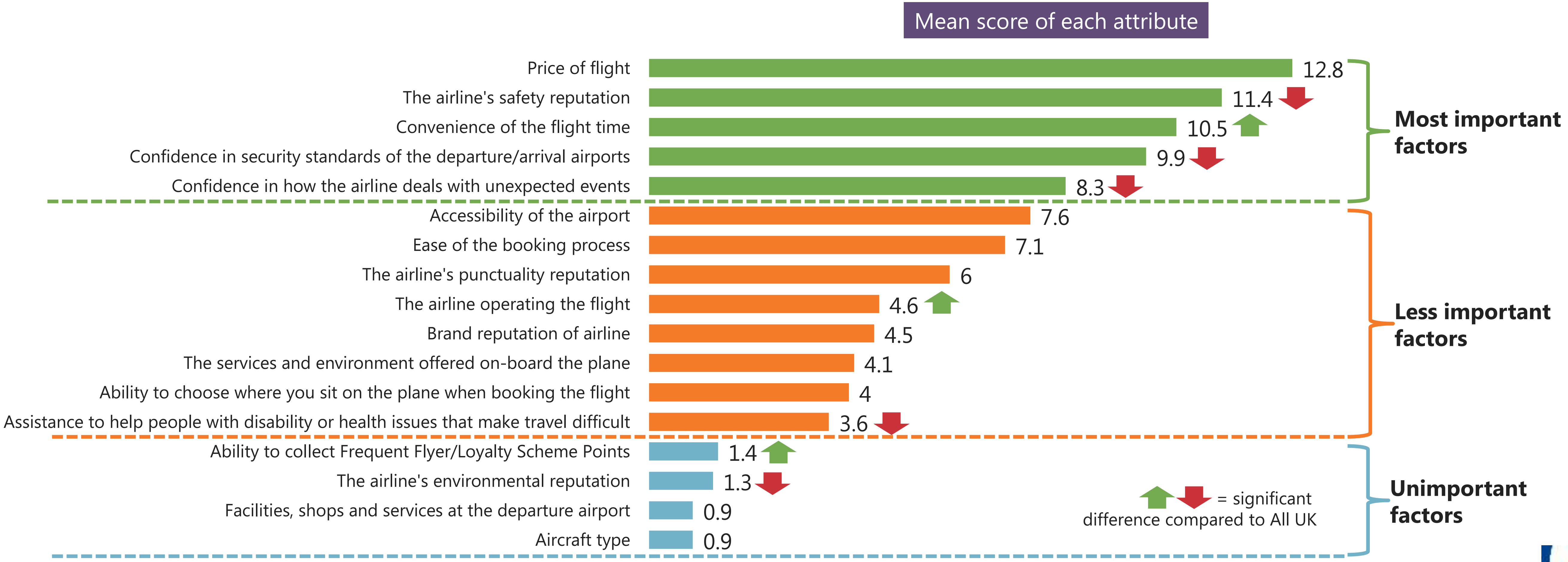


Ipsos Loyalty

Q120. Max Diff exercise: For each screen tell us which one aspect is most important to you when choosing a flight and which is least important to you. Base: PRM participants completing an online interview (558).

Relative importance when booking: Frequent Flyers

For frequent flyers, price is even more important than the airline's safety reputation. Flight times are more important than confidence in the security at departure and arrival airports. Collecting loyalty points is more important, but choosing seats is less so.



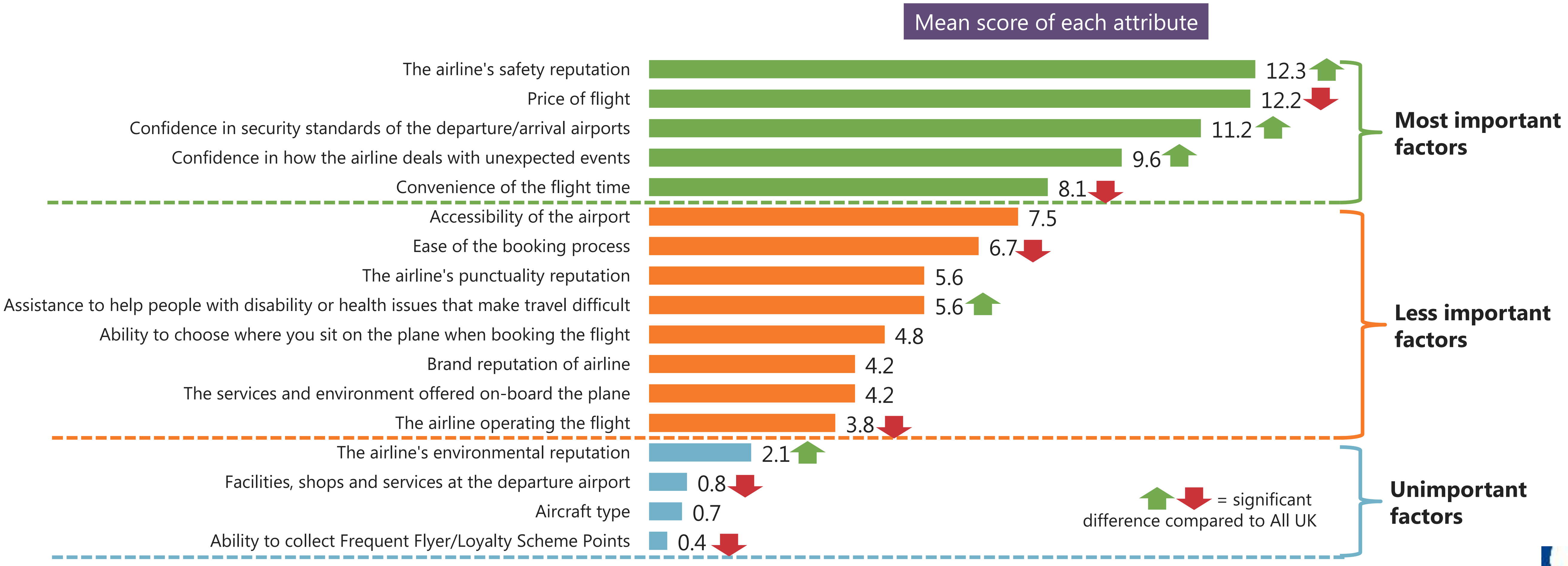
Ipsos Loyalty

Q120. Max Diff exercise: For each screen tell us which one aspect is most important to you when choosing a flight and which is least important to you. Base: Frequent flyers (who have flown four times or more in the last twelve months) who completed an online interview (297). Frequent flyers are defined as those who have flown 4 or more times in the past year.

Civil Aviation Authority

Relative importance when booking: Non-recent flyers

Security and safety are more important for non-recent flyers. They are less concerned about the convenience of the flight time and airline specific factors such as its brand reputation.



Ipsos Loyalty

Q120. Max Diff exercise: For each screen tell us which one aspect is most important to you when choosing a flight and which is least important to you. Base: Non-recent flyers (those who have not flown in the last twelve months) who completed an online interview (1,202).

Awareness of rights

Ipsos Loyalty

Awareness of Rights

General understanding of rights is mixed, with many people showing confusion their rights. There is a lack of awareness of when airlines must offer compensation, who can receive special assistance, and what kind of assistance can be provided.

- **When a short haul flight is delayed by three hours or more, a sizeable proportion don't know what the airlines must provide them with**
    - Almost six in ten (59%) consumers know that they are entitled to food and drink, or vouchers to purchase food and drink and over one third (37%) think they are entitled to financial compensation. Almost one in ten (9%) mistakenly believe they are entitled to a full refund.
- **The ATOL protection scheme is misunderstood by many consumers. Half correctly identify that all holidays bought from a UK company, where flights and accommodation are sold together, must be ATOL protected.**
    - Forty six percent think flights booked with a UK airline are ATOL protected, and over one third think that about holidays bought through a European company. Over a quarter of participants do not know what ATOL protection means.
- **Many do not know who is entitled to special assistance when they fly. There is a particular misunderstanding about those with a non-physical compared to a physical disability**
    - More than eight in ten (81%) think that those with a physical disability are entitled to special assistance when they fly, but just a third think that those with a non-physical disability are entitled to special assistance.
- **The type of assistance available is not well known. Many think that assistance should include getting on a plane, but only three in ten (31%) think that assistance available includes getting from the airport car park to the airport entrance.**
    - When considering what special assistance is available, the views of PRMs are largely similar to those of UK consumers overall

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Civil Aviation Authority

Awareness of rights when things go wrong

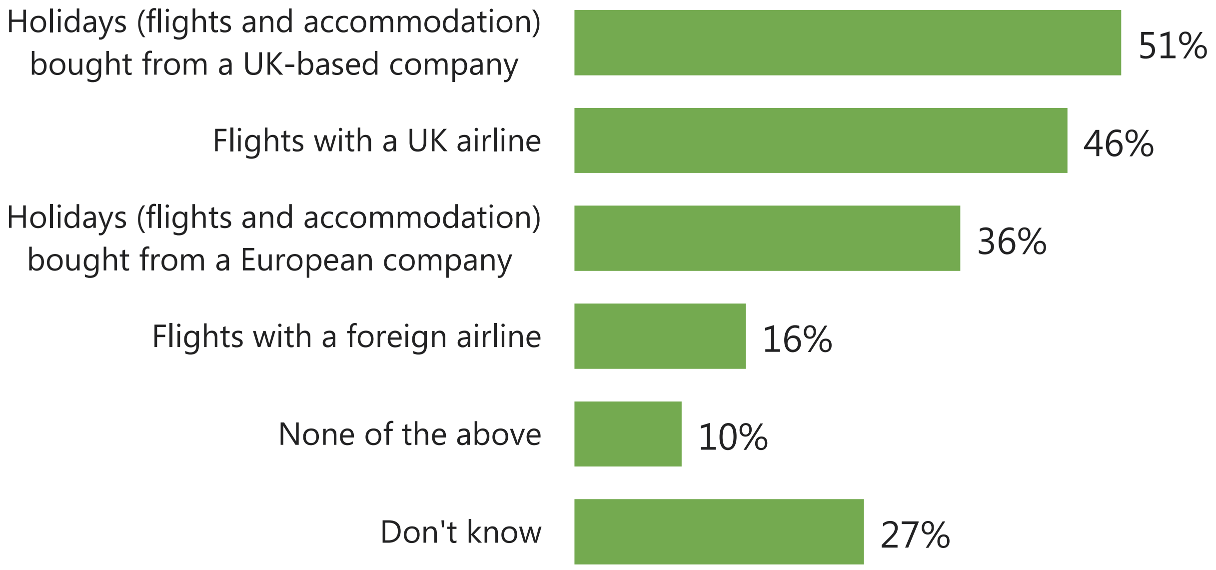
UK consumers have some knowledge of their rights when things go wrong, either when a flight is delayed or if a holiday company goes bankrupt. That said, there is definitely some confusion with notable proportions over estimating entitlements and protection coverage.

Awareness of rights when a flight is delayed

Around six in ten realise that they are entitled to food and drink, but only 38% currently think information about rights must be provided. Over half wrongly think they must be informed about the flight status, whilst 16% admit to not knowing and 8% select none of the above.

Understanding of the ATOL scheme

There is some confusion over what ATOL protection means. Half correctly believe it always provides protection for a holiday (i.e. flights and accommodation) bought via UK based companies. There is confusion over whether European companies are covered, and over one quarter of people admit to not knowing.



Ipsos Loyalty

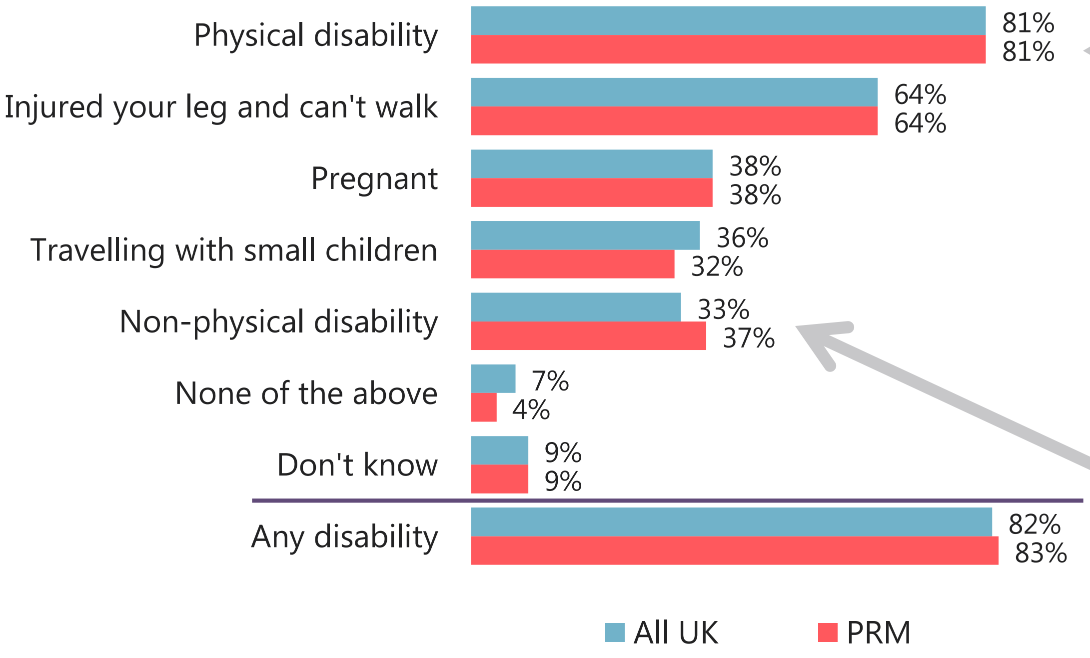
Q100. If you were delayed by more than three hours on a short haul flight from a UK airport, which, if any, of the following things must your airline provide you with? (3,007) | Q103. If a holiday is 'ATOL protected' you will get your money back if the company that sold it to you goes bust before your travel, or you will be flown back home if they go bust while you are away. What things do you think are always 'ATOL protected'? (3007).

Civil Aviation Authority

Awareness of rights: special assistance

Many UK consumers, including PRMs, underestimate how much assistance is available to those with disabilities.

In what circumstances are people entitled to special assistance?



Proportion of those who think that someone with a physical disability are entitled special assistance:

Of those with a physical disability: 84%

...and of those, participants requiring assistance. 89%

Proportion of those who think that someone with a non-physical disability are entitled to special assistance:

Of those with non-physical disability: 37%

...and of those, participants requiring assistance.* 53%

* Caution: low base (<100)

= significant difference v All PRM

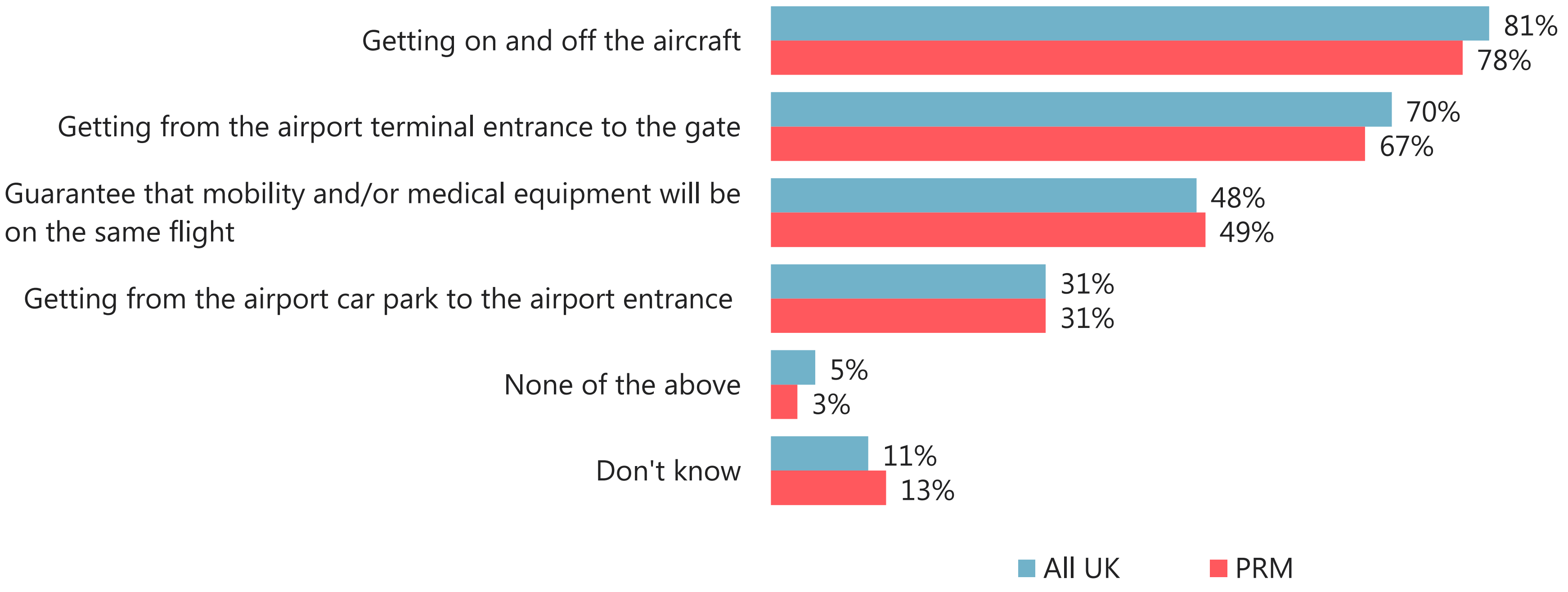
Ipsos Loyalty

Q101. Now thinking more generally about flying, in what circumstances, if any, do you think would be entitled to special assistance at an airport and on-board an aircraft? Base: All participants (3,007), PRM (558), physical disability (436), physical disability requiring assistance (184), non-physical disability (239), non-physical disability requiring assistance (64)*.

Awareness of rights: special assistance

Awareness of the rights of those requiring special assistance is low in places. Even amongst PRM passengers with both physical and non-physical disabilities, there is limited awareness of some of their rights.

Perceptions of what those with disabilities are entitled to



PRM sub-group

Physical disability	Physical – requiring assistance	Non-physical disability	Non-physical - requiring assistance –
80%	82%	75%	78%
69%	70%	61%	67%
51%	57%	46%	55%
30%	32%	32%	36%
3%	2%	4%	3%
11%	9%	13%	6%

* Caution: low base (<100)

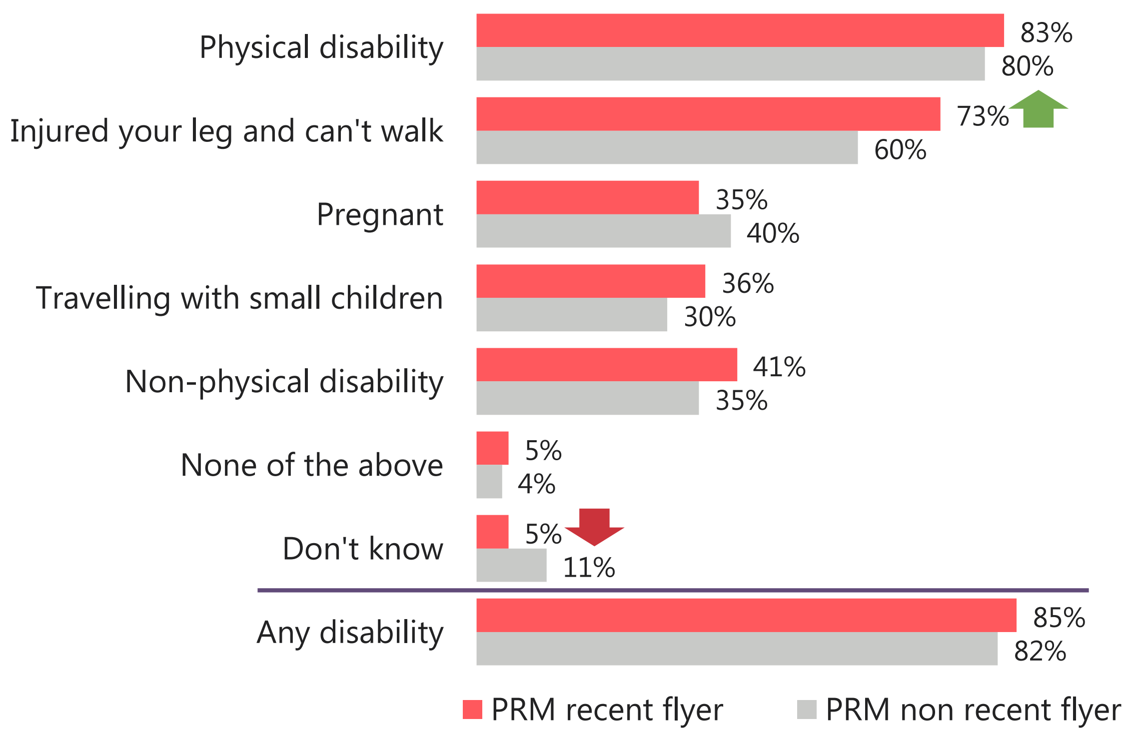
Ipsos Loyalty

Q102. Which of the following things do you think people with disabilities are entitled to when travelling by air? Base: All participants (3,007), PRM (558), physical disabilities (436), physical disabilities requiring assistance (184), non-physical disabilities (239), physical disabilities requiring assistance (64)*.

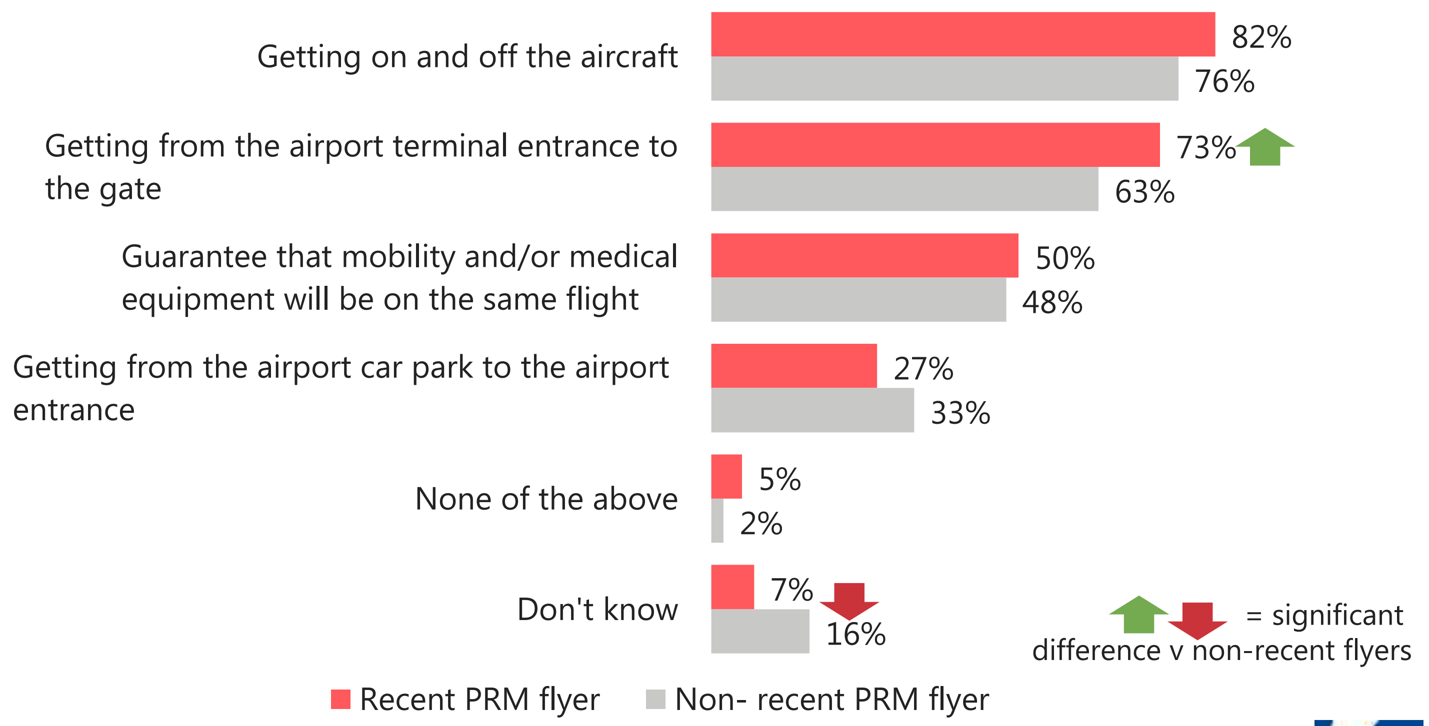
Awareness of rights: recent PRM flyers

Whilst PRMs with recent flight experience are less likely to state that they 'don't know' their rights, their awareness is broadly aligned with PRMs without a recent flight experience.

In what circumstances are people entitled to special assistance?



Perceptions of what those with disabilities are entitled to



Q101. Now thinking more generally about flying, in what circumstances, if any, do you think would be entitled to special assistance at an airport and on-board an aircraft? Base: All participants (3,007), PRM (558). Q102. Which of the following things do you think people with disabilities are entitled to when travelling by air? Base: PRM recent-flyers (202), PRM non-recent flyers (356).

Ipsos Loyalty

Comparisons with other industries

Ipsos Loyalty

Sector comparisons - Summary

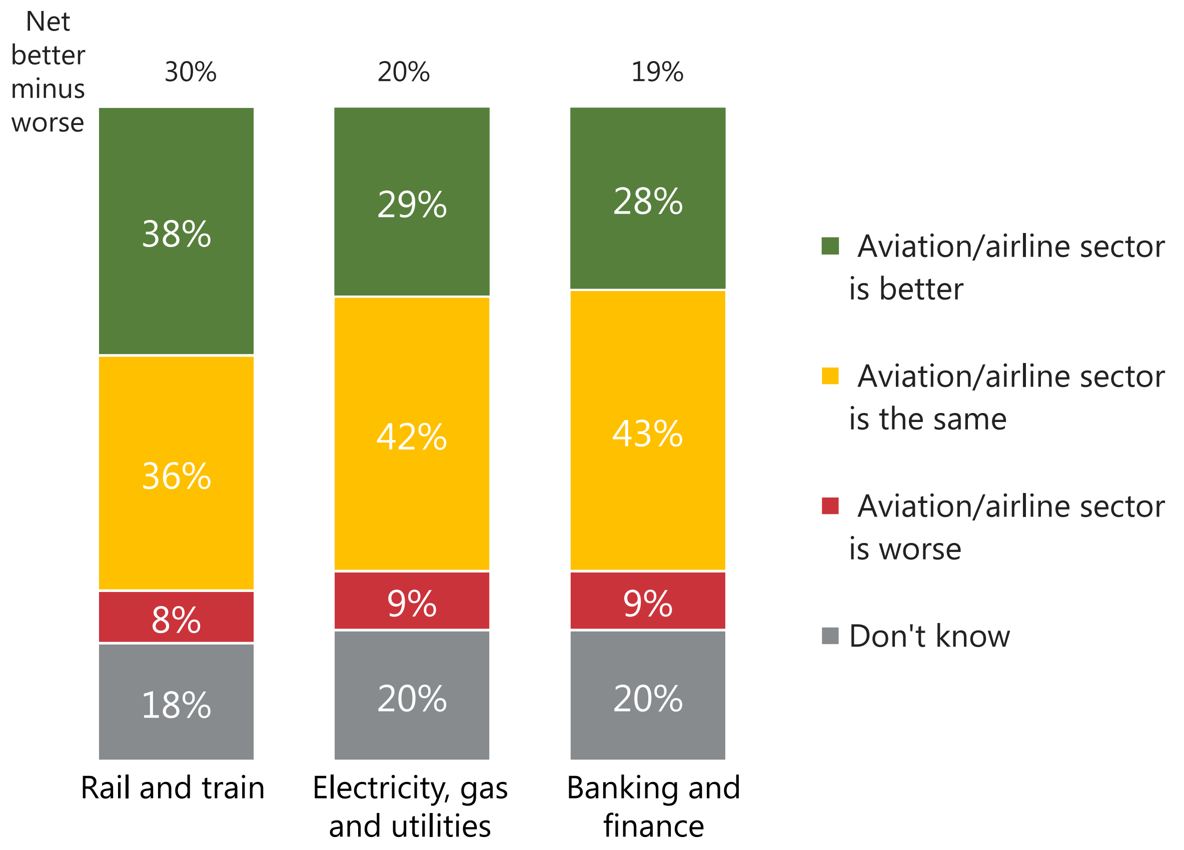
UK consumers are more likely to compare aviation favourably than unfavourably to other sectors, although many are unable to differentiate.

- **Perceptions of the availability and choice for customers and reliability of services is better for the aviation sector than other industries**
    - Over a third (38%) of consumers think that the airline industry is better than the rail and train industry when it comes to consumer choice. Three in ten (29%) say aviation is better than electricity, gas and utilities companies and 28% favourably compare the sector to banking and finance in this regard. Under one in ten say the aviation sector is worse than each of these industries.
    - On balance , UK consumers are more likely to see reliability of the aviation sector as better or on par with the other sectors, in particular the rail industry where 44% rate the aviation sector as better and 6% say it is worse.
- **The aviation and airline industry is perceived as safer than other industries.**
    - Compared to the other industries, there is some degree of recognition of aviation safety. 32% of consumers think it is safer than the rail and train sector, and 29% think it is safer than the electricity, gas and utilities sector, compared to the 6% who say it is less safe for each sector.
- **Consumers of all ages say the aviation sector is better than other industries at providing enough information to make the right choices**
    - Overall, there is very little difference between ages when it comes to having enough information to make the right choices. The only difference between generations is when comparisons are made to the banking and finance sector. 31% of those between 55 and 64 see the aviation sector as better, significantly higher than average.
    - However, there is a difference between those who book online compared to those booking via other channels. Those who book online feel they have greater access to information within the aviation setting than those who book on the telephone or face-to-face.
- **Recent flyers are more likely to make positive comparisons between the aviation sector and other industries. Those who have flown in the last 12 months are more likely to say the aviation sector is better than all other industries for each aspect measured**
- **There is a sizeable proportion of don't know responses, almost half in some cases, indicating that large sections of the UK find it difficult to differentiate between industries.**

Ipsos Loyalty

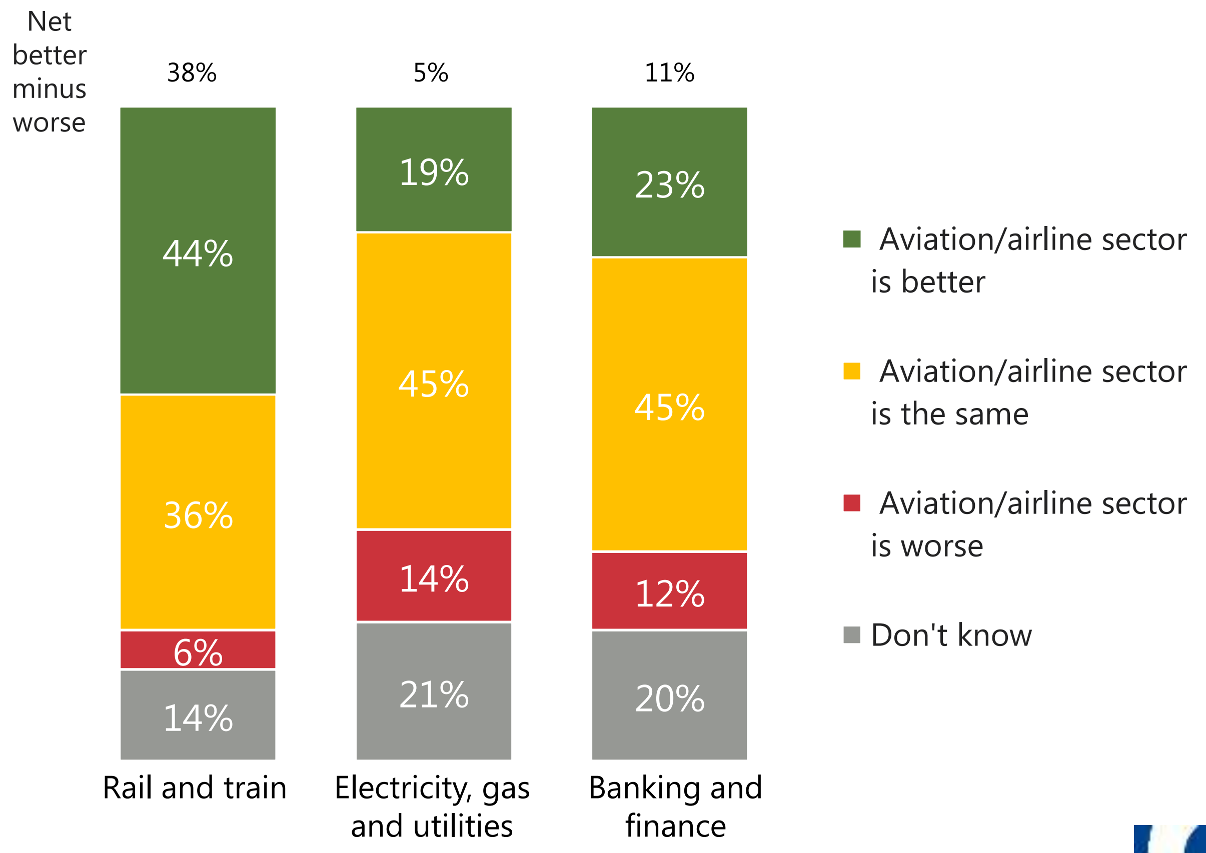
Availability and choice for the consumer

At least three times as many people say the aviation sector is better for consumer choice than say it is worse compared to the other industries.



Reliability of services

44% percent think that the aviation industry is better than the rail sector when it comes to reliability. Compared to the other sectors that are viewed more comparably.

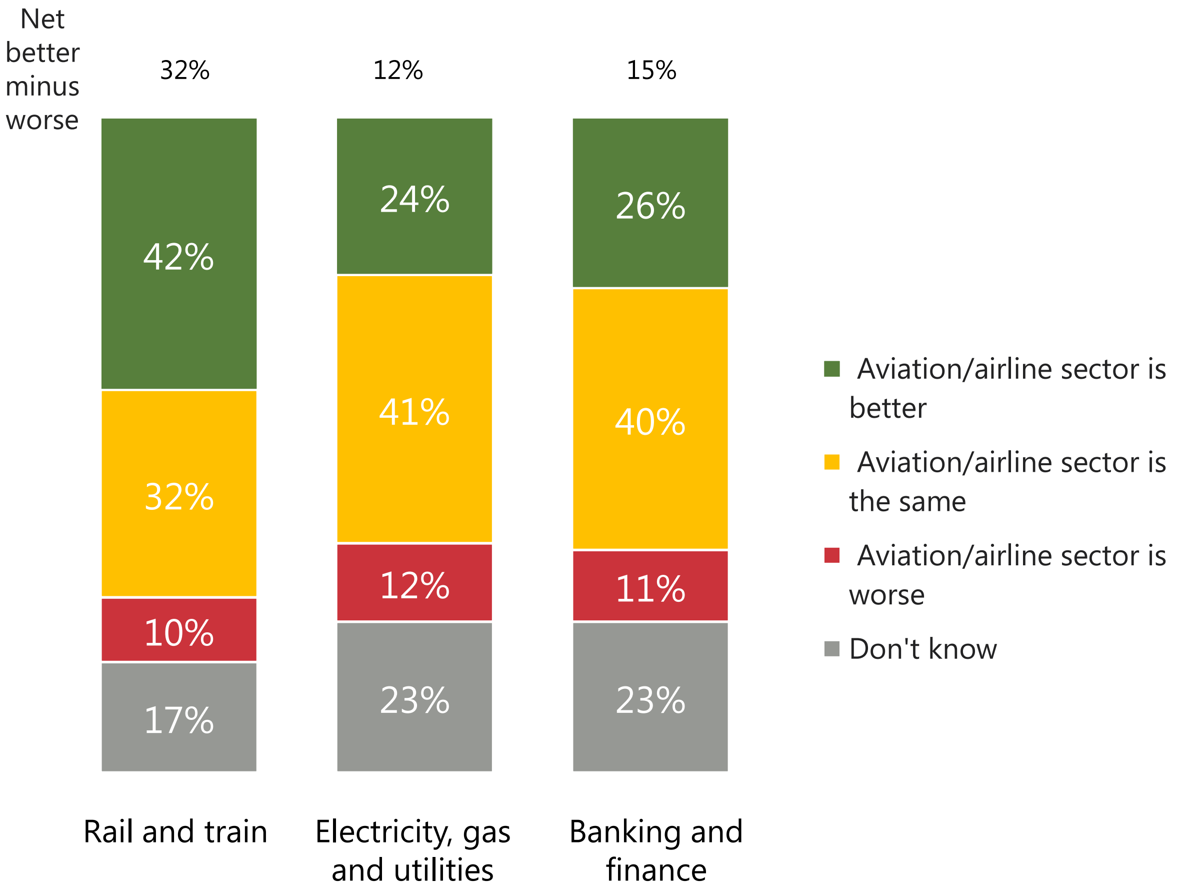


Ipsos Loyalty

Q110. Compared to other industries, would you say the aviation and airline sector is better, the same or worse for the following aspects? Base: All participants (1165-1176).

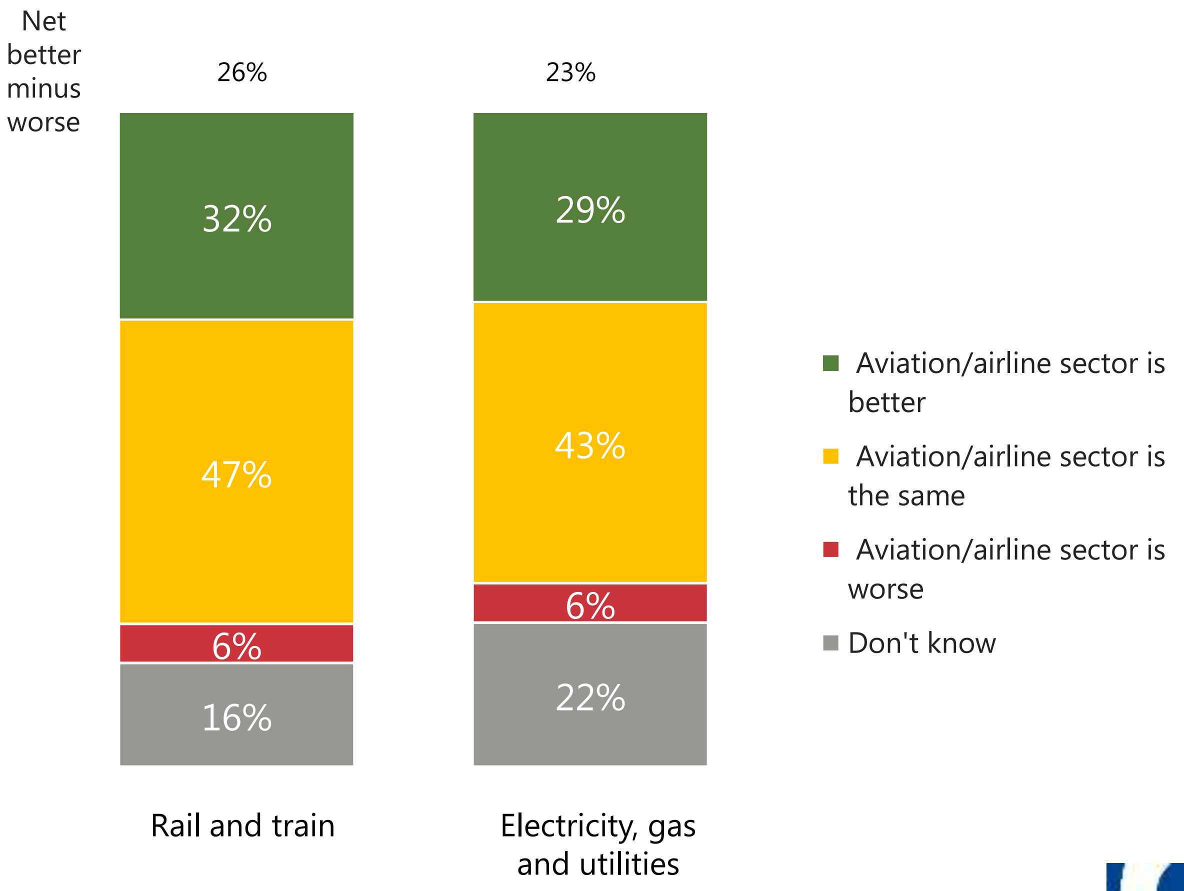
Value for money

Two in five consumers state that airlines are seen as providing Better value for money than the rail industry.



Safety

The aviation industry is seen as safer than the rail and utilities sector by around one in three.

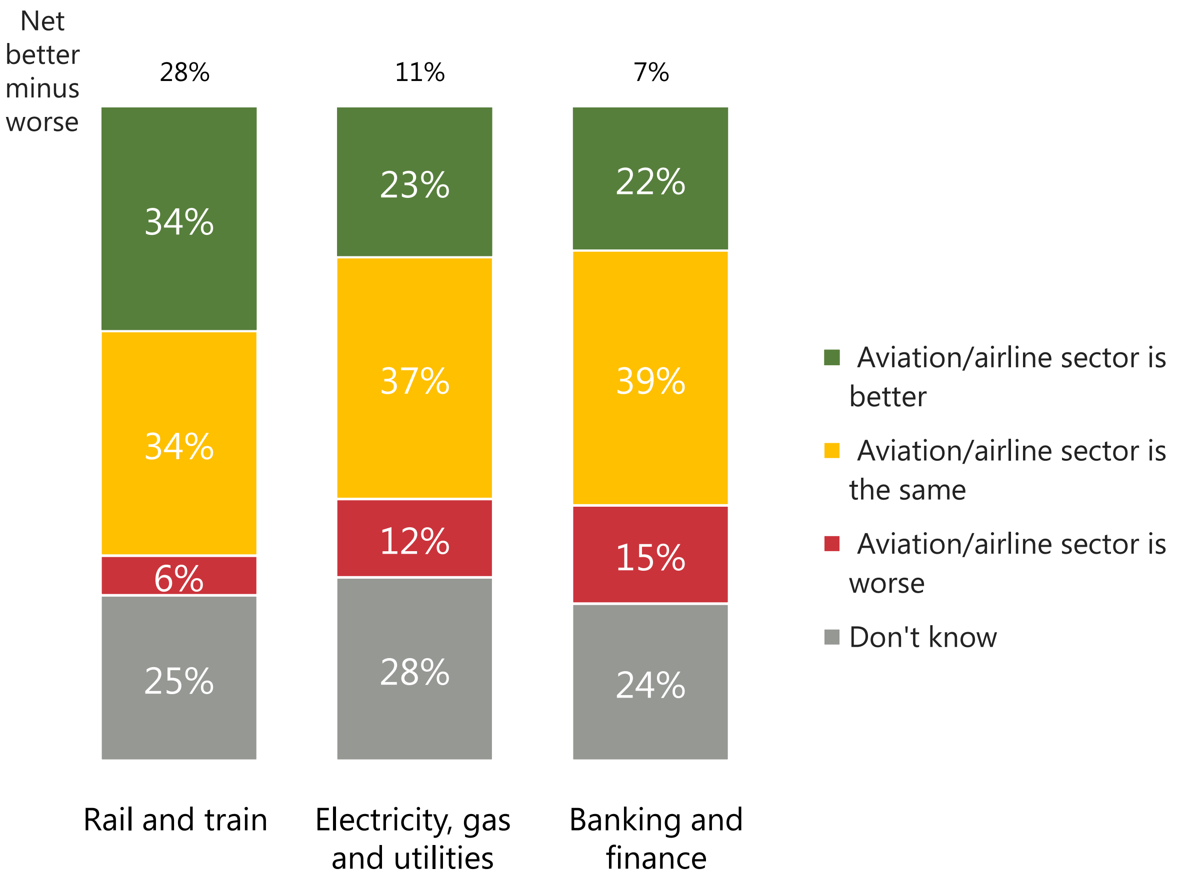


Ipsos Loyalty

Q110. Compared to other industries, would you say the aviation and airline sector is better, the same or worse for the following aspects? Base: All participants (1165-1176).

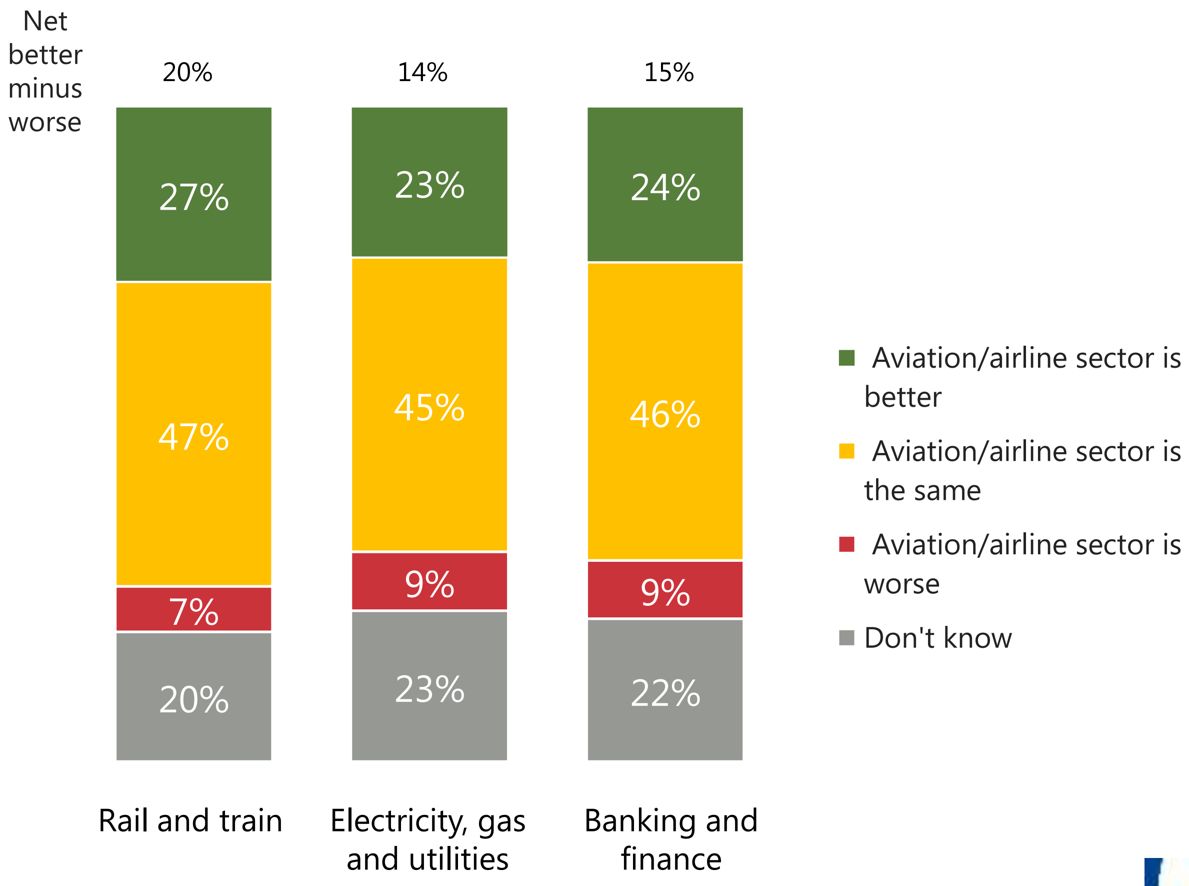
Strength of consumer rights

Consumer rights in the aviation sector are rated to be better than the rail sector by a third of consumers.



Availability of information to make the right choices

Information is seen as more widely available in the aviation Sector by around a quarter across sectors.



Ipsos Loyalty

Q110. Compared to other industries, would you say the aviation and airline sector is better, the same or worse for the following aspects? Base: All participants (1165-1176).

Comparing the Aviation sector to other industries

Percentage of participants saying that the aviation and airline industry sector is better.

	Rail and train	Electricity, gas and utilities	Banking and Finance
Availability and choice for the consumer	38	29	28
Reliability of services	44	19	23
Strength of consumer rights	34	23	22
Availability of information to make the right choices	27	23	24
Value for money	42	24	26
Safety	32	29	N/A

Ipsos Loyalty

Q110. Compared to other industries, would you say the aviation and airline sector is better, the same or worse for the following aspects? Base: All participants (1165-1176).

Civil Aviation Authority

Appendix

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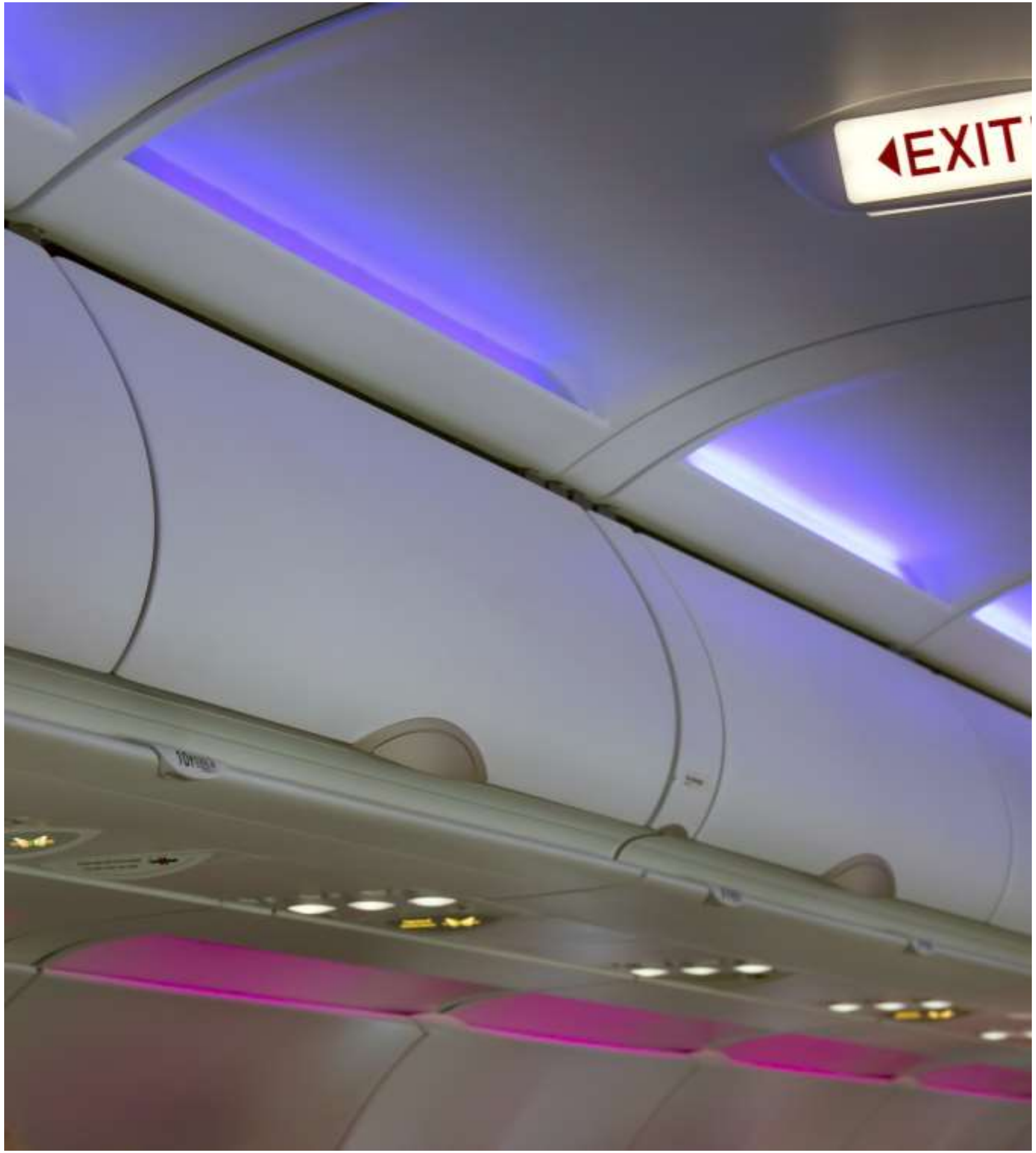

Ipsos MORI's standards and accreditations

Ipsos MORI's standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.

ISO 20252:2012

The international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos MORI was the first company in the world to gain this accreditation.

MRS Company Partnership

By being an MRS Company Partner, Ipsos MORI endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation.

ISO 9001:2008

International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.

ISO 27001:2005

International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos MORI was the first research company in the UK to be awarded this in August 2008.

Data Protection Act

Ipsos MORI is required to comply with the Data Protection Act; it covers the processing of personal data and the protection of privacy

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252:2012 and with the Ipsos MORI Terms and Conditions.

Ipsos Loyalty

Thank you.

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