



Civil Aviation Authority: UK Aviation Consumer Survey

August 2018



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BACKGROUND AND METHODOLOGY

BACKGROUND

The Civil Aviation Authority (CAA) commissioned ComRes, an independent research organisation, to conduct the fifth wave of its annual consumer research tracking study. The research is used by the CAA to develop a deeper understanding of UK consumers' flying behaviours and their attitudes towards the aviation industry. This research programme was carried out in accordance with the requirements of the international quality standard for market research and will inform the CAA's policy and strategy as it regulates the aviation market.

METHODOLOGY AND INTERPRETATION

A total of 3,500 interviews were conducted with a demographically representative sample of UK adults (18+) between 29th March – 20th April 2018. 3,000 interviews were conducted online and 500 were conducted over the telephone. 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 14 minutes online and 17 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. Any questions asked online only are labelled as such.

ComRes follows the Market Research Society's Code of Conduct. ComRes is a member of the British Polling Council and abides by its rules.

Please note that some changes in trends or patterns between Wave 5 (spring 2018) and Wave 4 (autumn 2018) may be attributed to some minor changes in research methodology.

DEMOGRAPHIC WEIGHTING AND QUOTAS

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

Category	Sub-category	Weighted proportion	Unweighted proportion
Gender	Male	49%	49%
	Female	51%	51%
Age	18-24	12%	12%
	25-34	17%	17%
	35-44	18%	18%
	45-54	18%	17%
	55-64	15%	15%
	65+	20%	21%
Working Status	Full time	41%	41%
	Part time	17%	18%
	Not	42%	41%

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

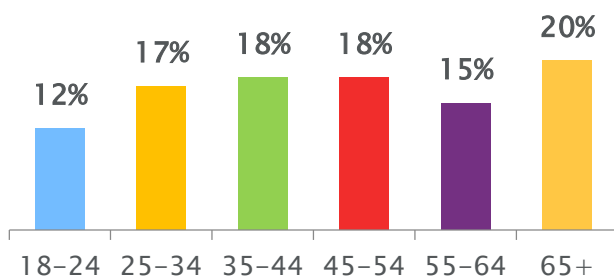
DEMOGRAPHIC (WEIGHTED) SAMPLE PROFILE

Gender

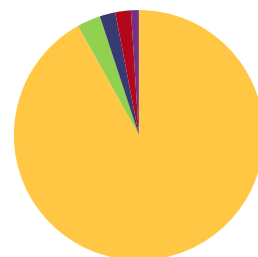


49% 51%

Age



Ethnicity



- White, 91%
- Asian or Asian British, 3%
- Black or Black British, 2%
- Mixed, 2%
- Chinese or other, 1%

Internet Access

95% of those interviewed by phone have internet access



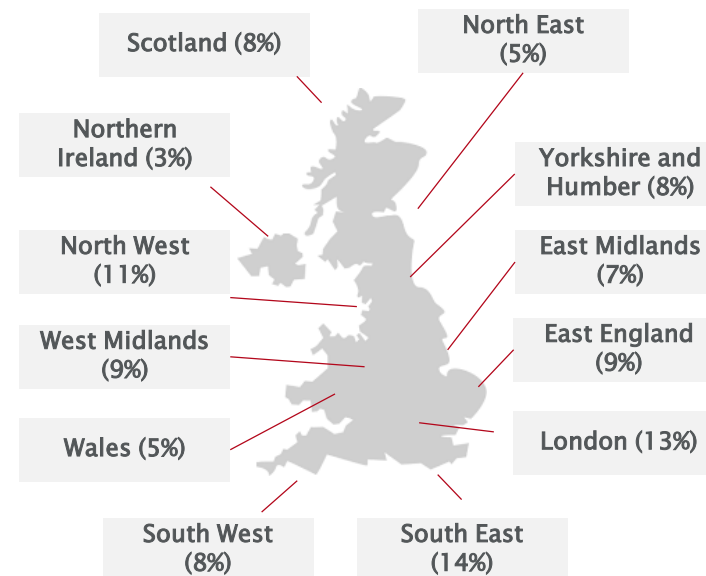
Working Status

Full time (30+ hours)	41%
Part time (8-29 hours)	16%
Part time (Under 8 hours)	1%
Not working	7%
Retired	22%
Homemaker	8%
Student / full time education	5%

Household Income

Up to 14,999	16%
£15,000 – £24,999	20%
£25,000 – £39,999	27%
£40,000 – £74,999	22%
£75,000 or more	7%

Regions

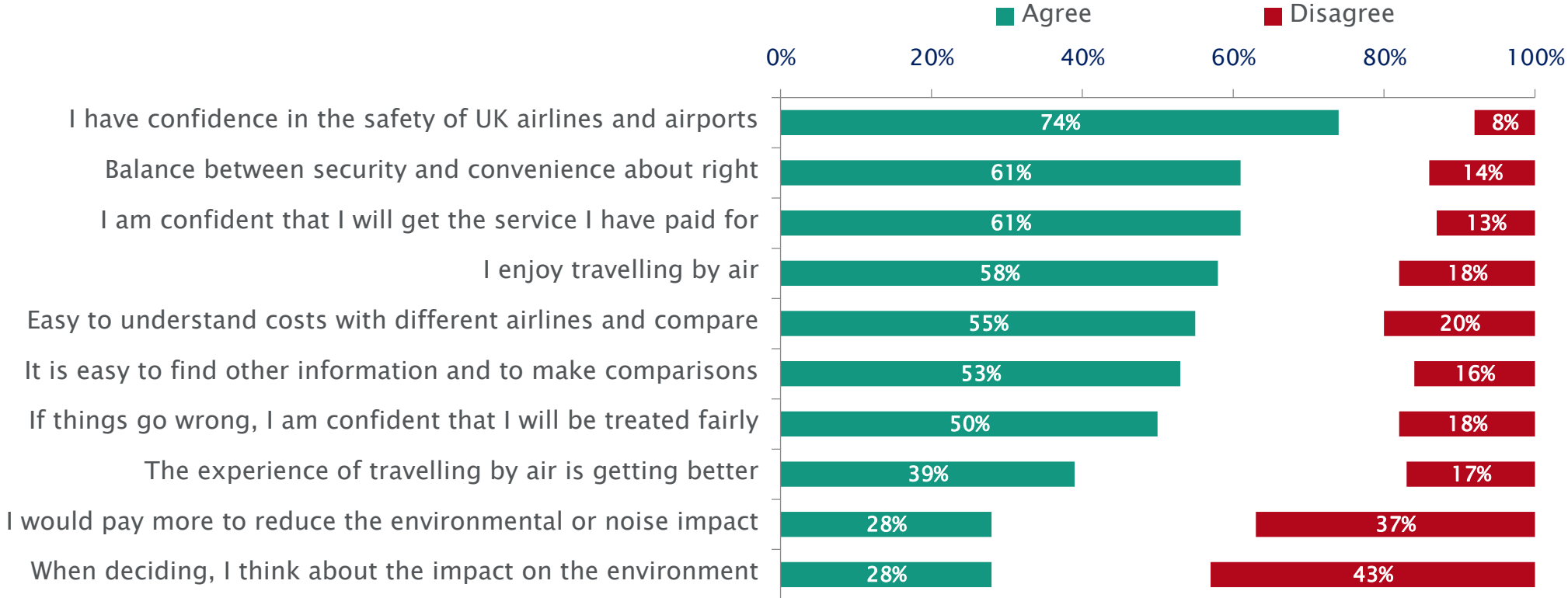


SECTION 1: HEADLINE MEASURES



THREE-QUARTERS OF UK ADULTS FEEL POSITIVE ABOUT THE SAFETY OF UK AIRLINES AND AIRPORTS

Statements about travelling by air



Passengers are likely to feel safe flying into and out of the UK, and also to find that security screening is sufficiently convenient. Three-quarters of UK adults (74%) say they have confidence in the safety of UK airlines and airports, with fewer than one in ten (8%) disagreeing. It should be noted, when considering the proportion of respondents who neither agreed nor disagreed the statement, that 44% of respondents surveyed had not flown in the past year. Three in five give (61%) say the balance between security screening and convenience is about right. The same proportion (61%) say they are confident they will get what they paid for. In terms of factors driving decisions to travel or how to travel, environmental impact is of low importance: only 28% would pay more for tickets to reduce the environmental impact of flying, and only 28% even think about the impact of flying when deciding to travel by air.

Q13. Please tell us to what extent you agree or disagree with each of the statements.
 Base: all respondents (n=3500)

LONDONERS ARE MORE LIKELY TO ENJOY TRAVELLING BY AIR OR THINK THAT THE EXPERIENCE IS GETTING BETTER

Statements about travelling by air

	Agree		
I have confidence in the safety of UK airlines and airports	74%	▼ (18-34) 66%	▼ Northern Ireland 65%
The balance between security screening and convenience to passengers at UK airports is about right	61%	▼ Black or Black British 43%	▼ Northern Ireland 51%
I am confident when travelling by air that I will get the service I have paid for	61%		
I enjoy travelling by air	58%	▲ (18-34) 61%	▲ London 65%
When searching for a flight it is easy to understand how much it costs to travel with different airlines and to make comparisons between them	55%	▲ (18-34) 61%	▲ London 62%
When searching for a flight it is easy to find other information that is important to me and to make comparisons between the information	53%	▲ (18-34) 56% vs. (55+) 50%	
If things go wrong when travelling by air, I am confident that I will be treated fairly	50%	▲ (35-54) 52% vs. (55+) 48%	
The experience of travelling by air is getting better	39%	▲ (18-34) 48%	▲ London 46%
I would pay more for flight tickets to reduce the environmental or noise impact of flying	28%	▼ (55+) 22%	▲ London 39%
When deciding whether to travel by air, I think about the impact of flying on the environment	28%	▼ (55+) 21%	▲ London 35%

Q13. Please tell us to what extent you agree or disagree with each of the statements.
Base: all respondents (n=3500)

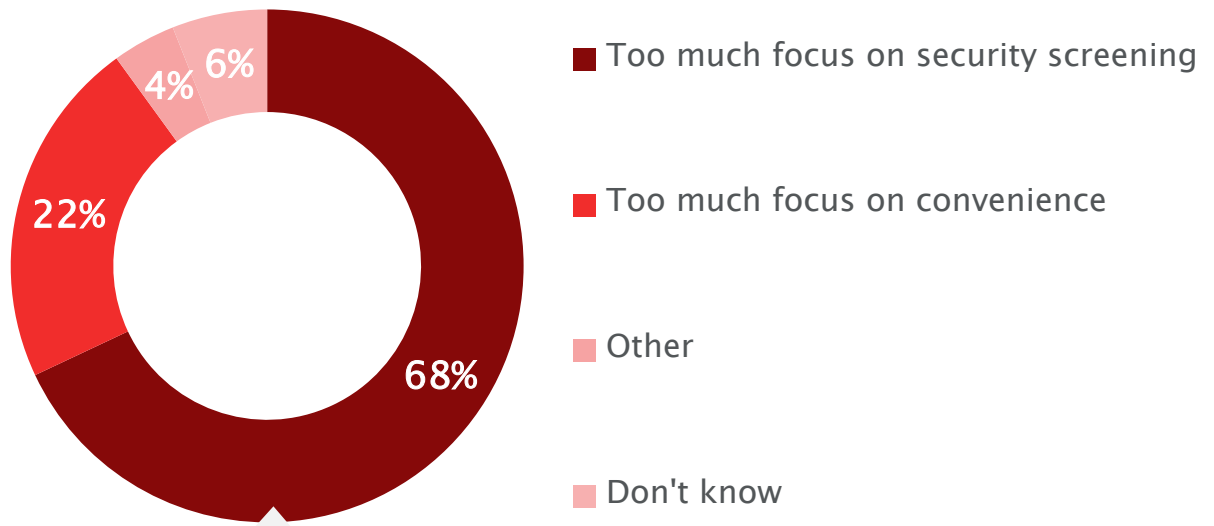
THREE-FIFTHS OF THOSE WHO FIND THAT SECURITY SCREENING AND CONVENIENCE ARE NOT WELL-BALANCED SAY THERE IS TOO MUCH FOCUS ON SECURITY

Security vs. Convenience balance

% of those who don't feel the balance between security screening and convenience is right: perceptions of focus

61% Agree the balance between security and convenience is right.

14% Disagree that the balance between security and convenience is right.



Too much security ▲ London 74%

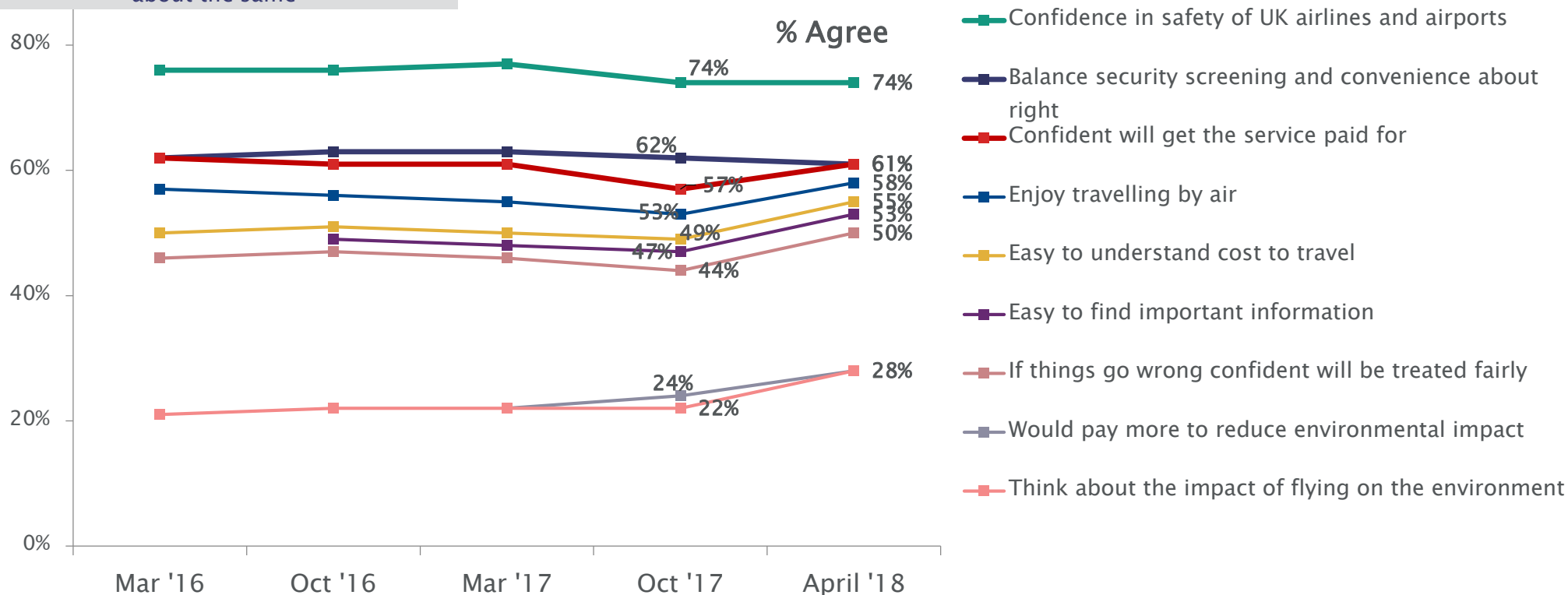
Three in five think the balance between security and convenience is about right. The 14% who do not find the balance between security screening and convenience to be right are likely to say there is too much focus on security screening (68%). Around one in five feel there is too much focus on convenience (22%).

Q14. You said you disagree that the balance between security screening at UK airports and convenience to passengers is about right. Which of the following best describes how you feel about this balance? Base: all who disagree that the balance between security screening and convenience is about right' (n=505)

CONFIDENCE IN SAFETY AND BALANCE OF SECURITY REMAINS THE SAME, WHILE ALL OTHER METRICS SEE AN INCREASE COMPARED TO THE PREVIOUS WAVE

39% agree that the experience of travelling by air is getting better – with a plurality believing the experience to be staying about the same

Headline Measures: Trend

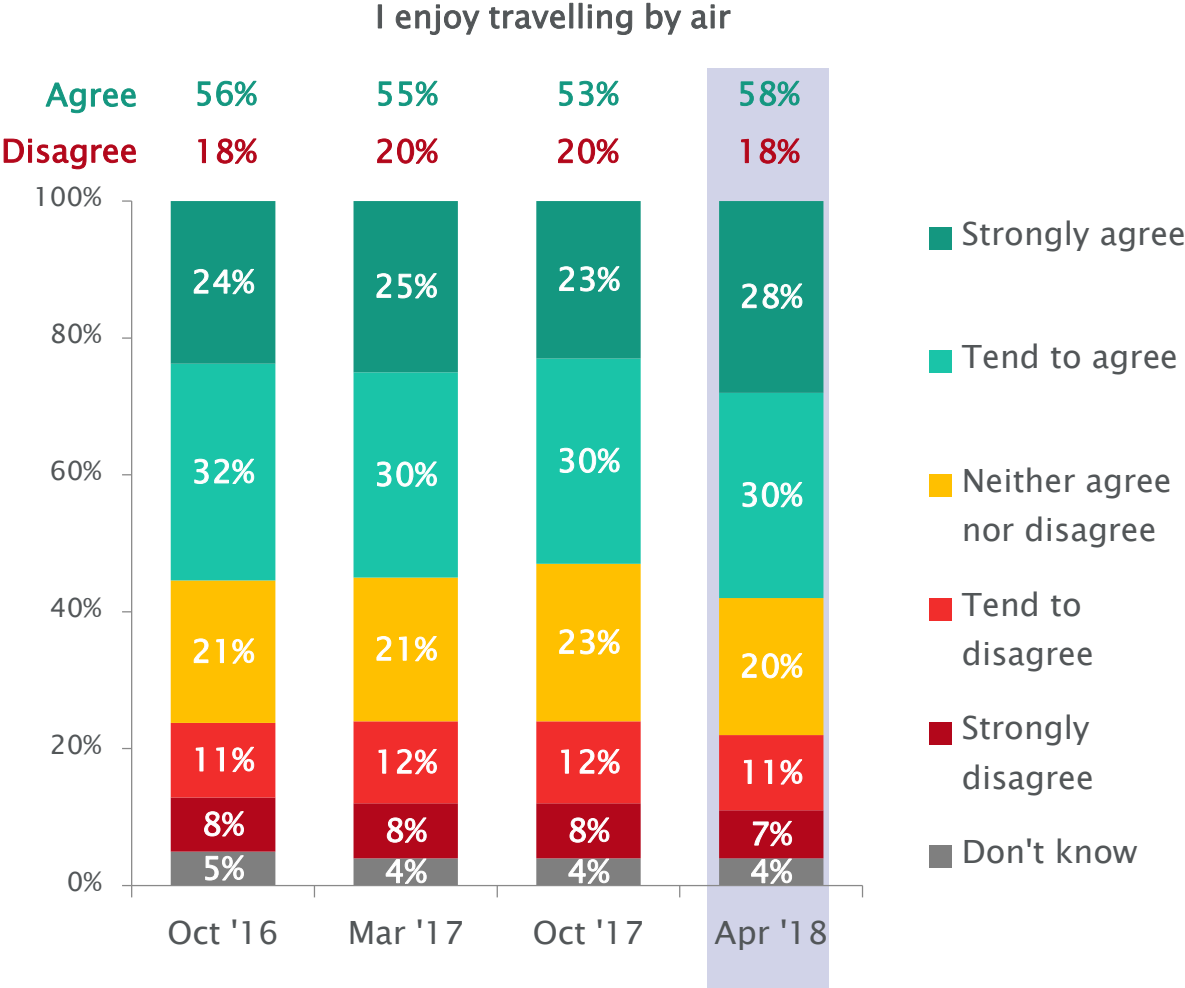


UK adults are similarly as likely as in Autumn 2017 to say they are confident in the safety of UK airlines and airports (74%) and that they enjoy travelling by air (61%). The transparency of information around flying appears to have improved as, compared to the previous wave, UK adults are slightly more likely to agree it is easy to understand the cost to travel with different airlines and to make comparisons between them (55% vs. 49% Autumn 2017) and that it is easy to find other information that is important to them and to make comparisons between the information (53% vs. 47%). UK adults are also more likely to agree that if things go wrong they are confident they will be treated fairly (50% vs. 44% in Autumn 2017). UK adults also appear to have become more conscious of the environmental impact of flying: there has been a slight increase in both the proportion who say they think about the impact of flying on the environment (28% vs. 22% Autumn 2017) or who would pay more for flight tickets to reduce the environmental impact of flying (28% vs. 24% Autumn 2017).

Q13. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements.
Base: all respondents (n=3500)

UK ADULTS ARE MORE LIKELY TO AGREE THAT THEY ENJOY TRAVELLING BY AIR COMPARED TO AUTUMN 2017

Headline Measures: Overall



Overall, the proportion of UK adults who say they enjoy travelling by air has increased compared to Autumn 2017, with six in ten agreeing with this statement (58%). One in five disagree with this statement (18%), in line with levels recorded in each of the previous waves.

There are a number of significant differences in the enjoyment of travelling by air across different demographics, namely:

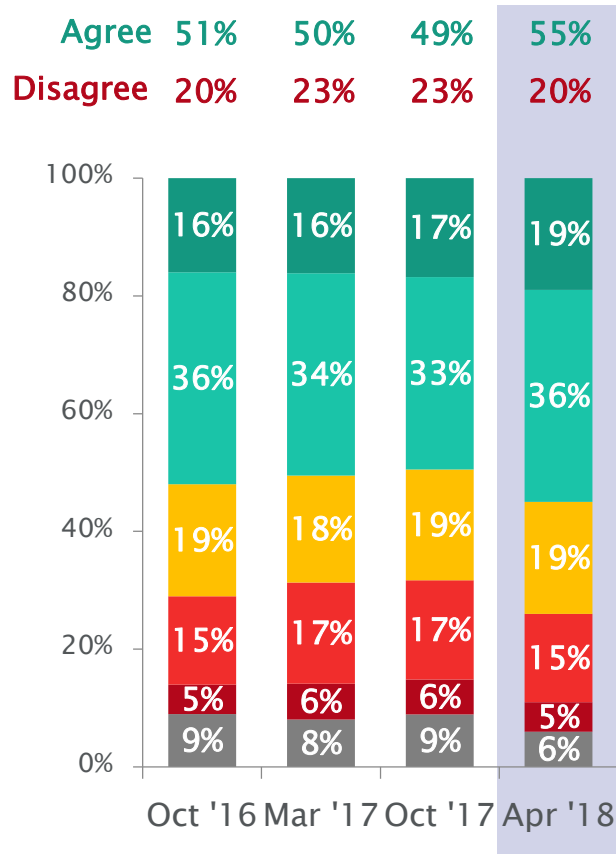
- Younger UK adults are more likely than their older counterparts to agree they enjoy travelling by air (61% 18–34 vs. 56% 55+);
- Men are slightly more likely than women to agree with this statement (60% vs. 57% respectively);
- Those with higher incomes are more likely than those with lower incomes to agree with this statement (64% >£50k vs. 58% <£50k);
- Non-disabled passengers are more likely than those who are disabled to say that they enjoy travelling by air (61% vs. 50% respectively).

Q13. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements.
Base: all respondents (n=3500)

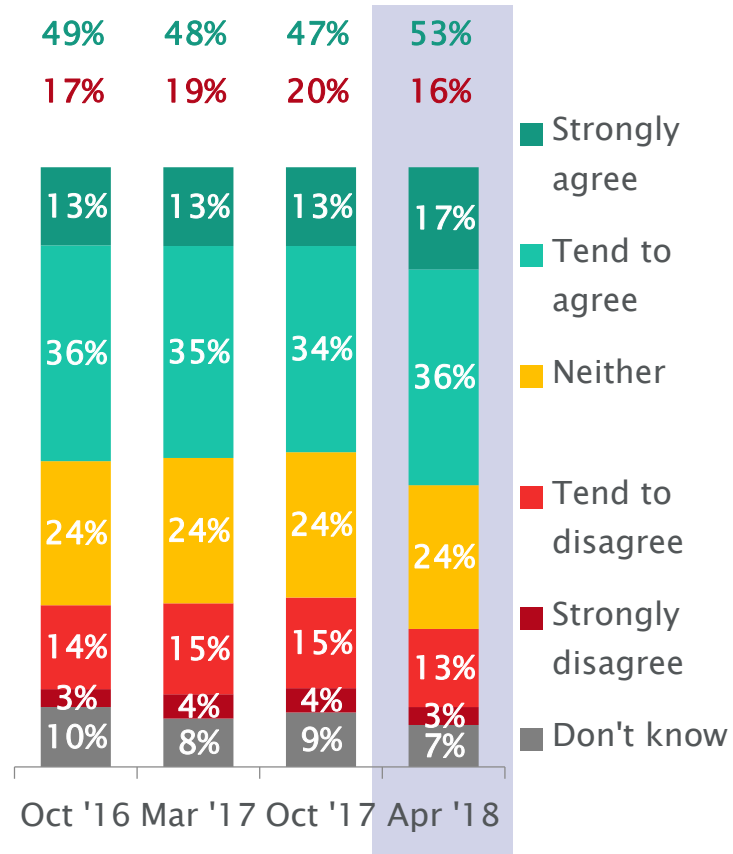
UK ADULTS ARE MORE LIKELY TO AGREE THAT IT IS EASY TO UNDERSTAND THE COST OF TRAVEL AND TO FIND IMPORTANT INFORMATION TO MAKE COMPARISONS THAN IN THE PREVIOUS WAVE

Headline Measures: Consumer Choice

Easy to understand how much it costs to travel with different airlines and to make comparisons between them



Easy to find other information that is important to me and to make comparisons between the information



UK adults are slightly more positive about the ease of making comparisons than in each of the previous waves of research: more than half agree that it is easy to understand the cost to travel and make comparisons (55%) and to find other important information and make comparisons (53%), representing an increase of 6 percentage points compared to Autumn 2017 on each measure. Over the same period, the proportion who disagree with each of these statements has declined slightly.

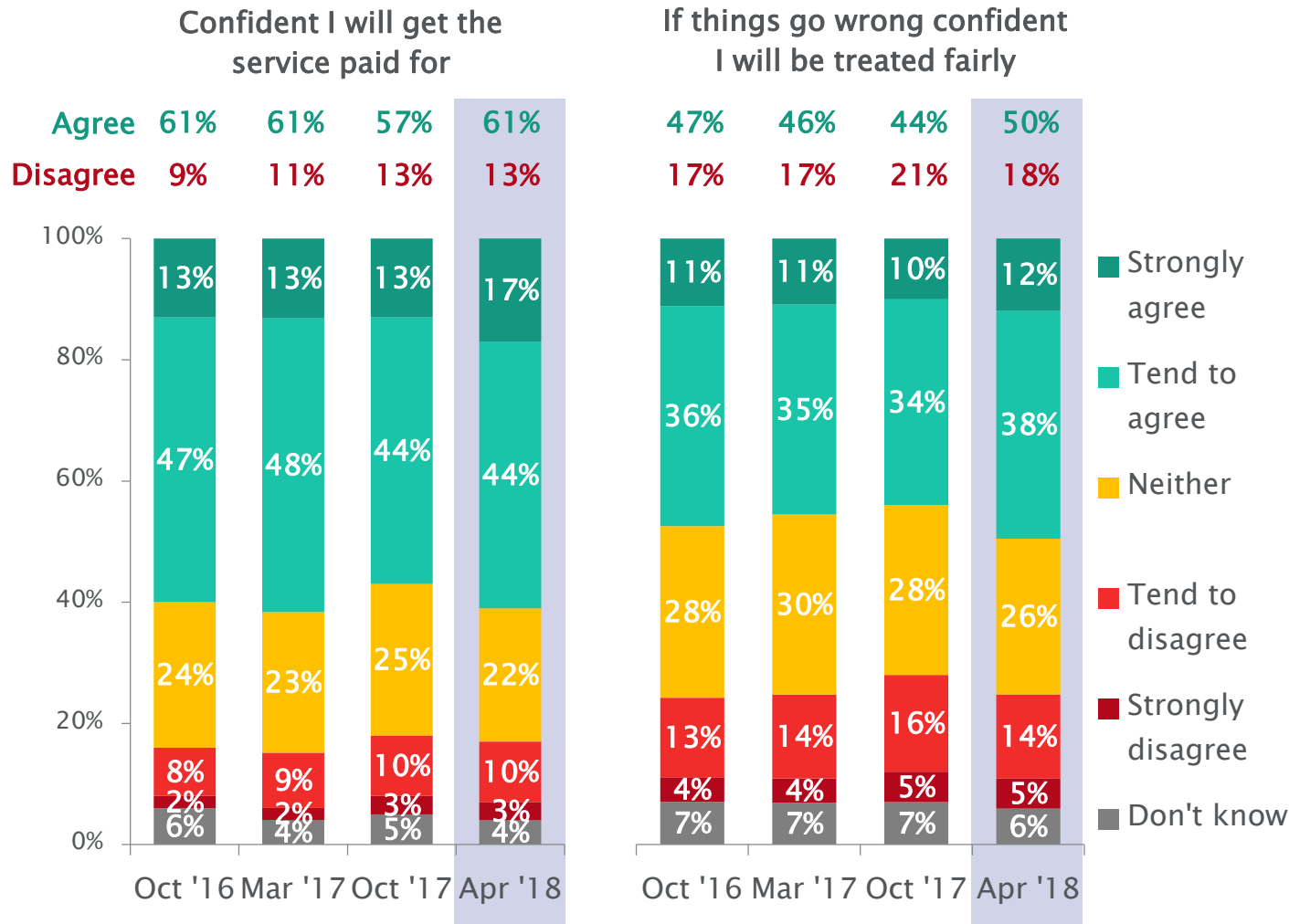
Within this, the following groups are more likely to agree with each of these statements:

- UK adults aged 18–34 (61% and 56% respectively);
- Those with an annual income of £50,000 or more (64% and 62% respectively);

Those with a disability are significantly less likely to agree that it is easy to understand the cost of travel and to make comparisons (47% vs. 57% non-disabled), or to agree that it is easily to find important information and compare this (42% vs. 56% non-disabled).

LEVELS OF CONSUMER CONFIDENCE HAVE IMPROVED COMPARED TO AUTUMN 2017

Headline Measures: Consumer Confidence



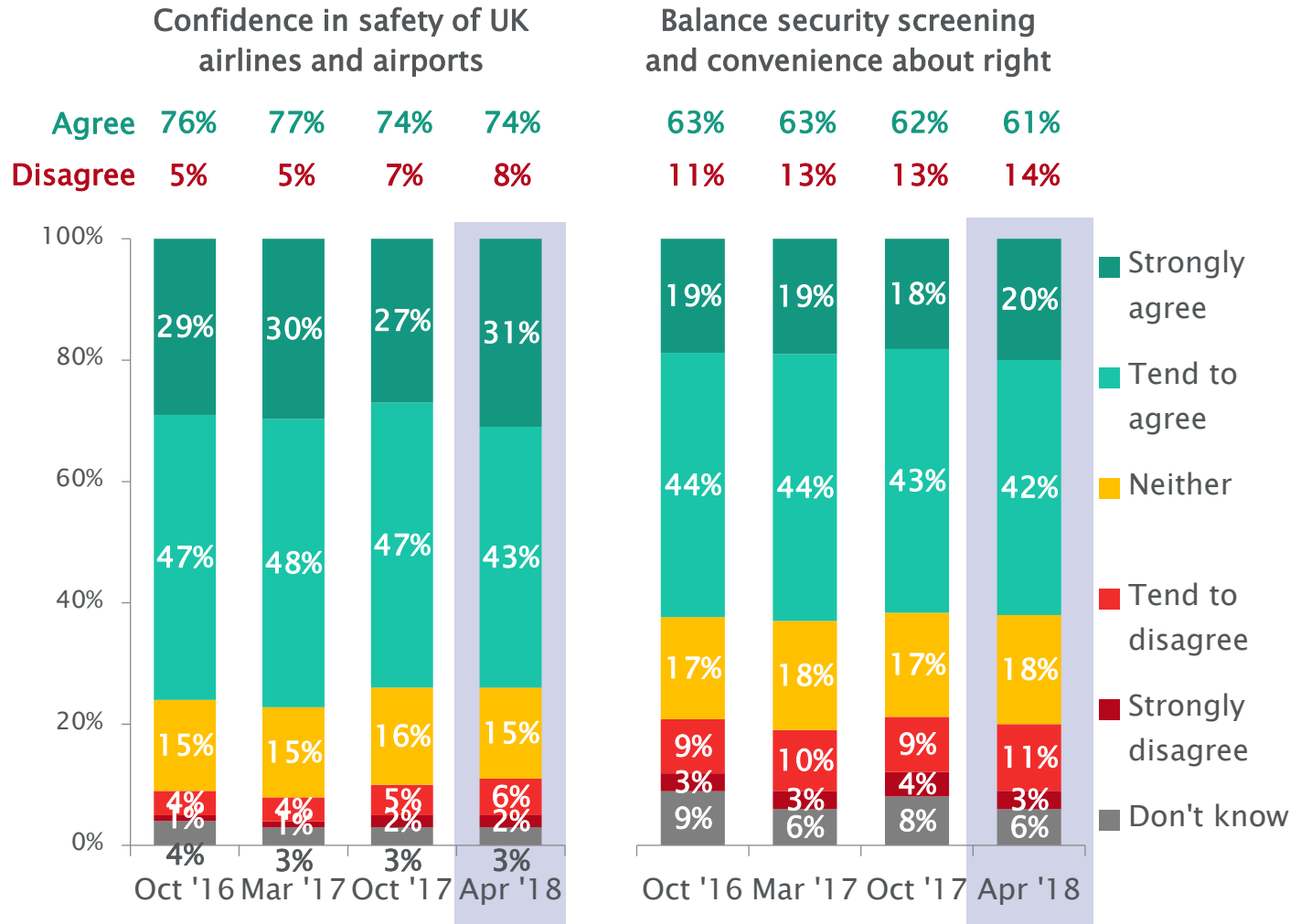
Consumer confidence has improved across both measures compared to Autumn 2017. Three in five (61%) say that they are confident they will get the service they have paid for when travelling by air, an increase of 4 percentage points compared to the last wave. Non-disabled passengers are more likely to feel this way than disabled passengers (63% vs. 54%).

Similarly, the proportion who agree that they are confident that they will be treated fairly if things go wrong has increased by 6 percentage points (50% Spring 2018 vs. 44% Autumn 2017).

Q13. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements.
Base: all respondents (n=3500)

A MAJORITY OF UK ADULTS FEEL POSITIVE ABOUT SAFETY AND SECURITY IN RELATION TO TRAVELLING BY AIR, IN LINE WITH AUTUMN 2017

Headline Measures: Security and Safety



Attitudes towards safety and security have remained in line with those expressed in the previous wave of research, with the majority of UK adults holding a positive opinion of this. More specifically, three quarters are confident in the safety of UK airlines and airports (74%), while three in five agree that the balance between security screening and convenience is about right (61%).

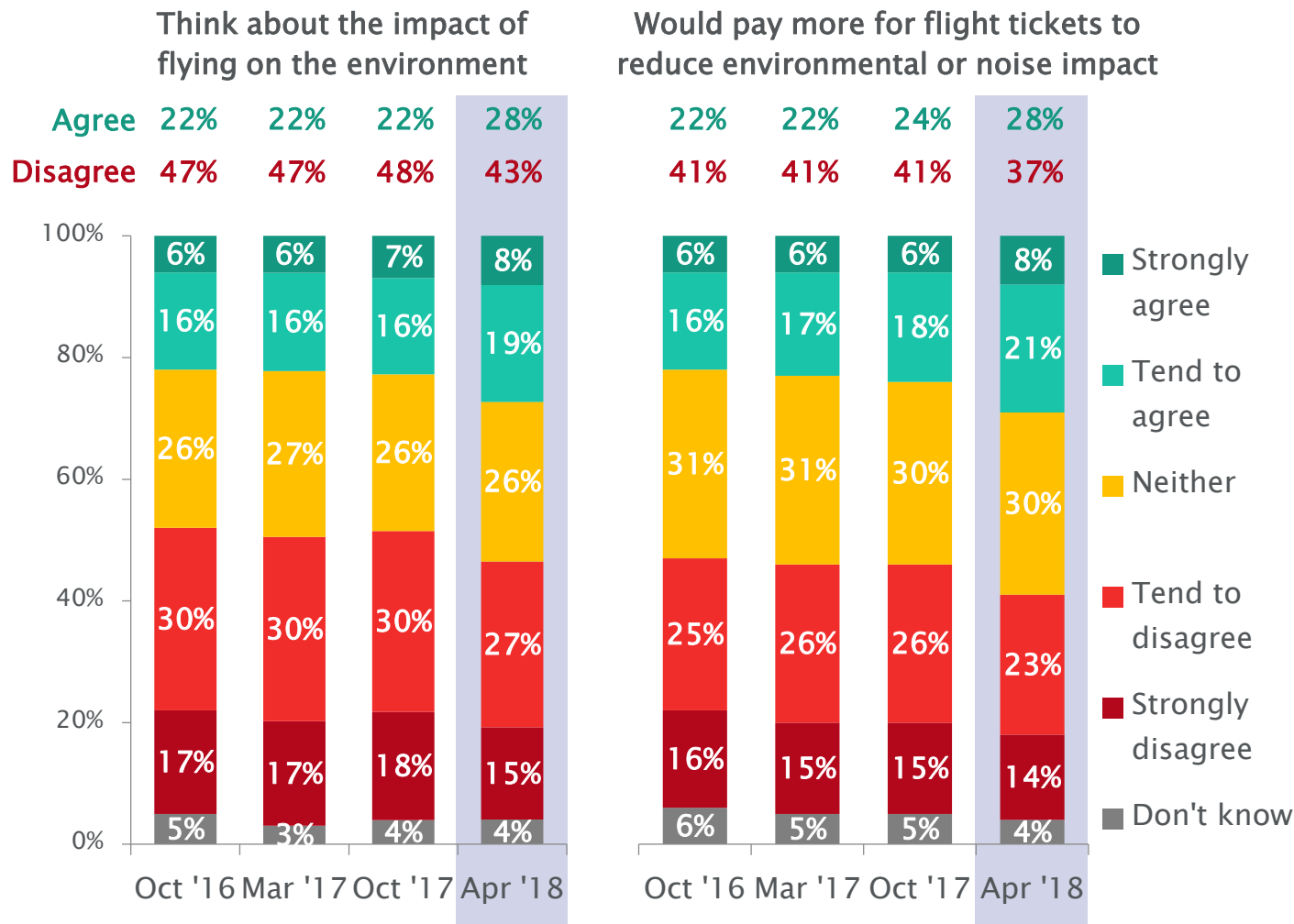
Opinion varies across different demographic groups, most notably:

- Older adults are more likely than their younger counterparts to have confidence in the safety of UK airlines and airports (80% 55+ vs. 66% 18-34);
- Disabled passengers are less likely than those without a disability to agree that the balance between security screening and convenience is about right (57% vs. 63% respectively).

Q13. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements.
Base: all respondents (n=3500)

CONSIDERATION GIVEN TO THE ENVIRONMENTAL IMPACT OF FLYING HAS INCREASED SLIGHTLY BUT NEVERTHELESS REMAINS LOW

Headline Measures: Environment



As seen in the previous wave of research, only a minority of adults say that they think about the impact flying on the environment, or that they would pay more for flight tickets to reduce the environmental or noise impact (28% agree for both). Nevertheless, this is a small increase on the proportion who said the same in Autumn 2017.

Attitudes towards the environmental impact of flying vary with age and income. More specifically:

- Younger UK adults are more likely than their older counterparts to agree that they think about the impact of flying on the environment (33% 18–34 vs. 21% 55+) or that they would pay more for flight tickets to reduce environmental or noise impact of flying (35% 18–34 vs. 22% 55+);
- Those on higher incomes are more likely to say that they do not think about the environmental impact of flying (49% >£50k vs. 41% <£50k), but more likely to agree they would pay more for tickets to reduce the environmental or noise impact of this (34% >£50k vs. 28% <£50k).

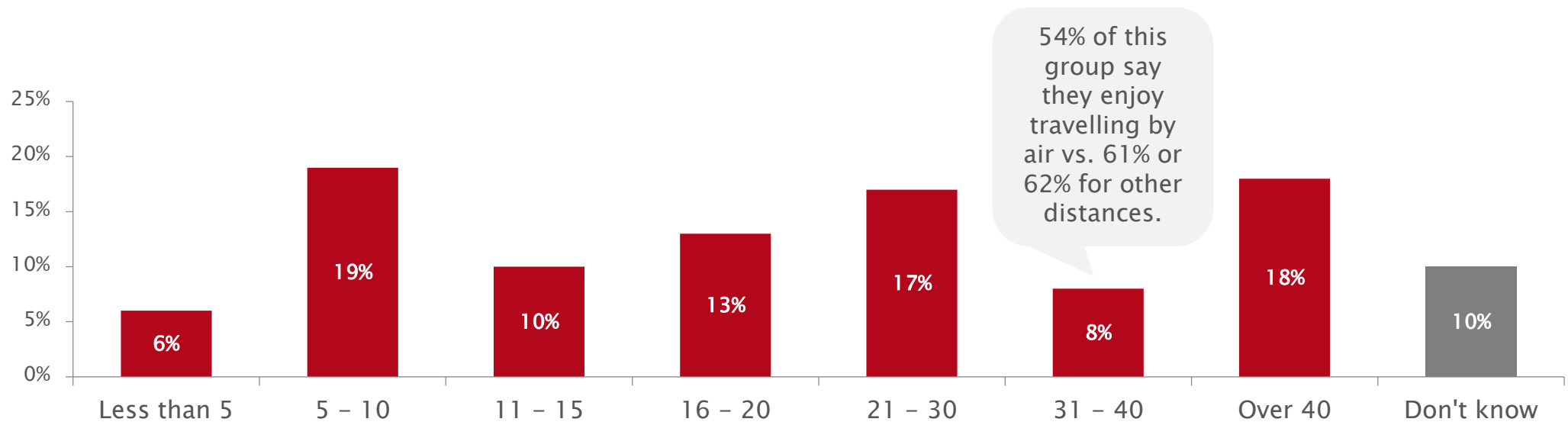
SECTION 2: FLYING BEHAVIOUR



ONE IN FIVE OF THE UK PUBLIC LIVE 5–10 MILES FROM AN AIRPORT

Distance from the nearest UK airport

% who live (distance in miles)



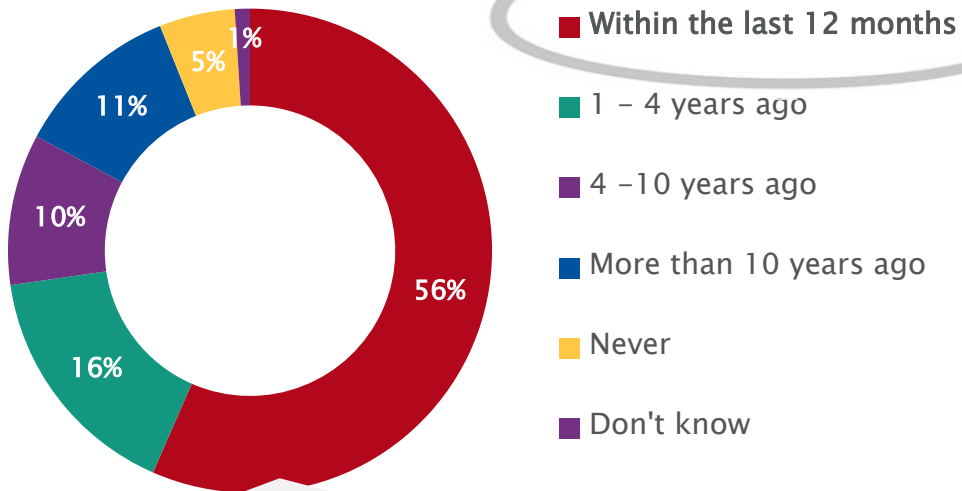
Nearly one in five (19%) of the UK population live fairly close to an airport (between 5–10 miles); a similar proportion (18%) say they live over 40 miles from their nearest airport. Similarly, 17% live 21–30 miles from their nearest UK airport.

There is no clear correlation between the distance passengers live from the airport and their satisfaction with the overall travel experience.

OVER HALF OF UK ADULTS HAVE TAKEN A FLIGHT WITHIN THE LAST YEAR

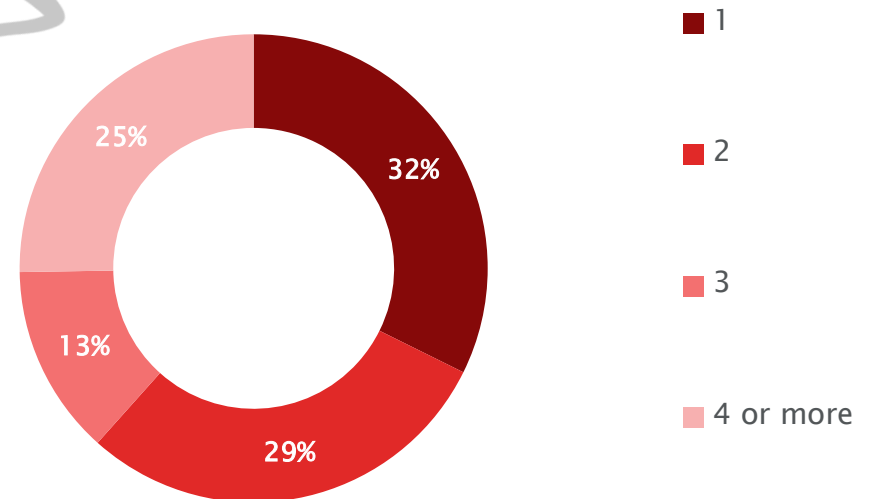
Time since flight from a UK airport

% last time taken a flight from a UK airport



Number of flights in the last 12 months

% no. of flights taken in last year



Flown in last year:

- 64% for 18-34 yr. olds
- 81% for those with 50k+ annual income
- 53% in October 2017 (increase of 3pp)

More than half (56%) of UK adults say they have taken at least one flight in the last year.

Those who have flown in the last year are most likely to have taken one flight in the last 12 months (32% say this). A quarter have flown four or more times in that period (25%).

Q2. When was the last time you flew from a UK airport? Base: all respondents (n=3500)

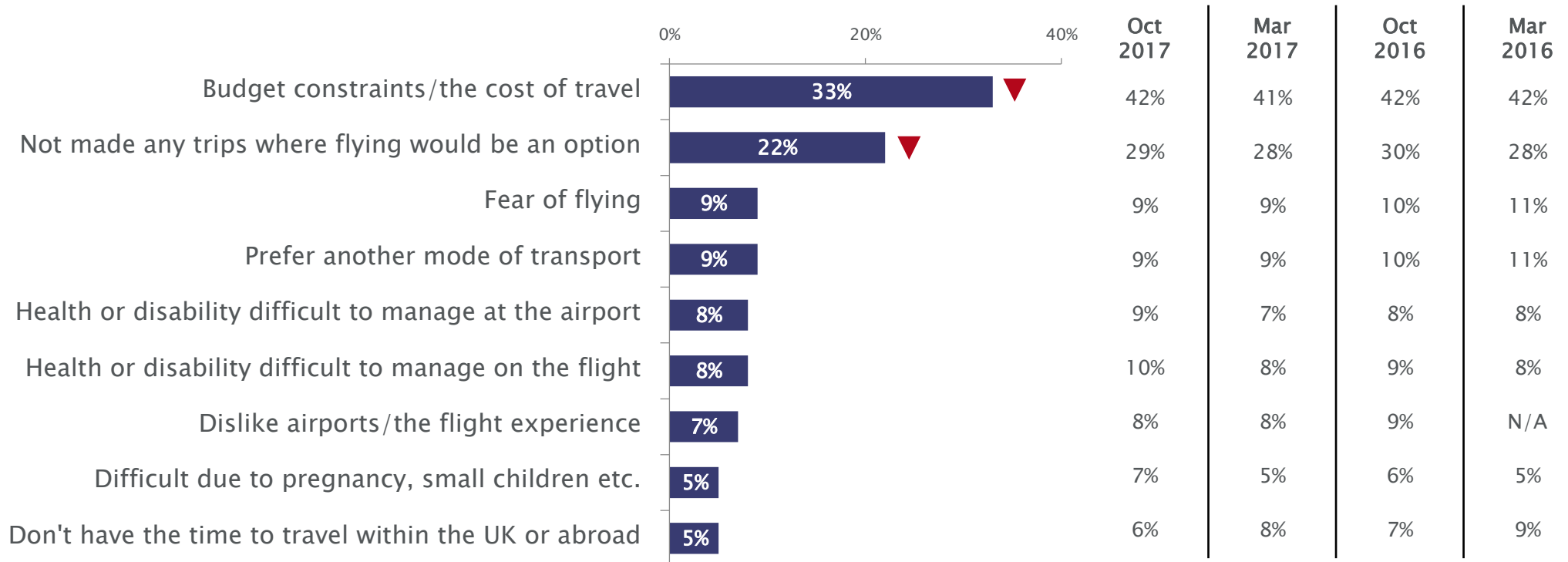
Q3. How many trips by air have you made in the last 12 months? Base: all who have flown in the last 12 months (n=1967)

BUDGET CONSTRAINTS AND THE COST OF TRAVEL REMAIN THE GREATEST BARRIERS TO FLYING

Barriers to flying in the past 12 months

% of those who have not flown in the last 12 months giving each of the following reasons

Showing all responses of 5% and over



Budget constraints and the cost of travel still remain the biggest barrier (33%) to flying but the importance of this factor has decreased significantly since October 2017. Almost all of the reasons given for not flying have decreased in importance since the last wave of research.

PASSENGERS ARE MOST LIKELY TO HAVE PURCHASED A RETURN FLIGHT ON THEIR LAST TRIP, SPENDING BETWEEN £101-£300

Price paid for last flight



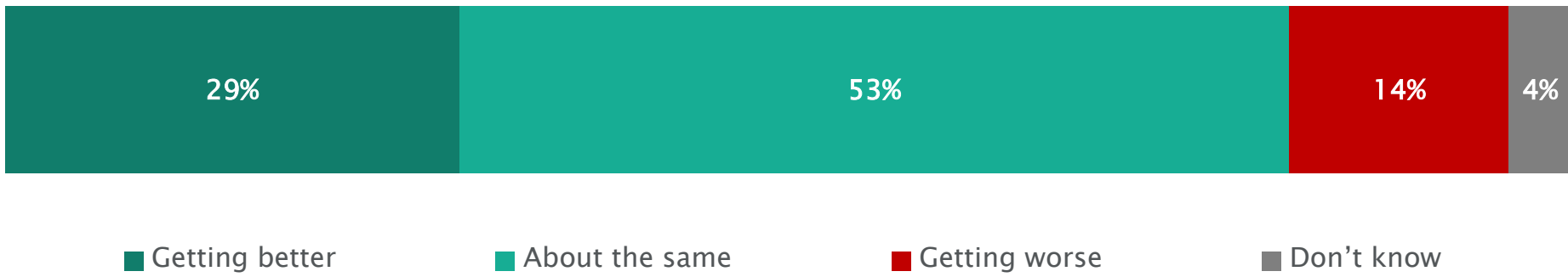
The majority (94%) who flew from a UK airport in the last 12 months purchased a return ticket; one in five paid more than £500 for their return flight (20%) and a similar proportion (18%) paid less than £100.

The price paid for a ticket does not impact impressions of the overall travel experience significantly.

Q4. Approximately how much did you pay for your last flight? Base: single (n=177), return (n=2718)

THE VAST MAJORITY OF PASSENGERS BELIEVE THE FLYING EXPERIENCE IS GETTING BETTER OR IS ABOUT THE SAME AS IT HAS BEEN OVER THE LAST FIVE YEARS

Perceptions of flying experience over time

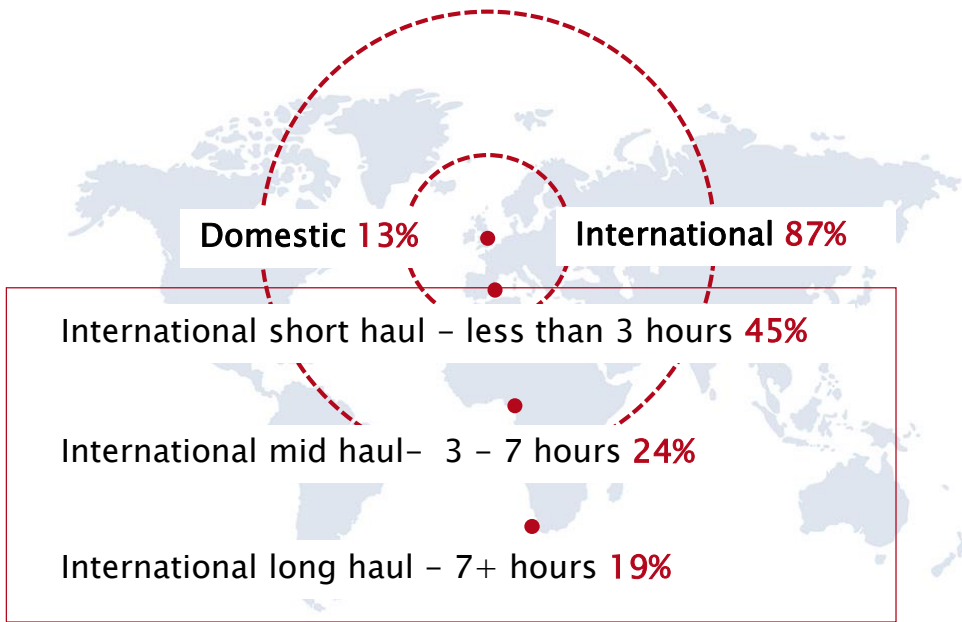


Around half of those who have flown in the last decade believe the flying experience is about the same as it has been in the past five years (53%). 29% say it is getting better, and a smaller proportion, one in seven (14%) of flyers, say the experience of flying is getting worse.

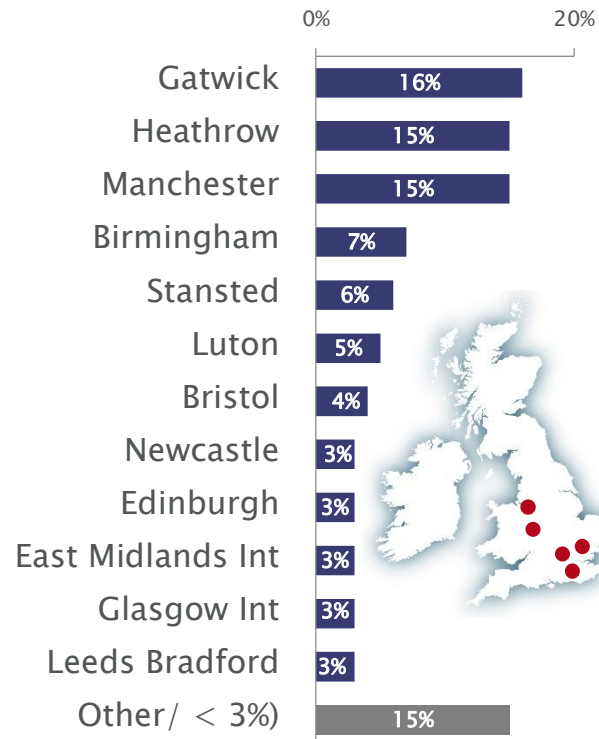
Q5. Thinking about your experiences of flying over the last five years, would you say that flying is: Base: all who have flown from a UK airport in the last 10 years. (n=2895)

NEARLY ½ FLIGHTS ARE LESS THAN 3 HOURS LONG, AND VIA A FEW AIRPORTS & AIRLINES

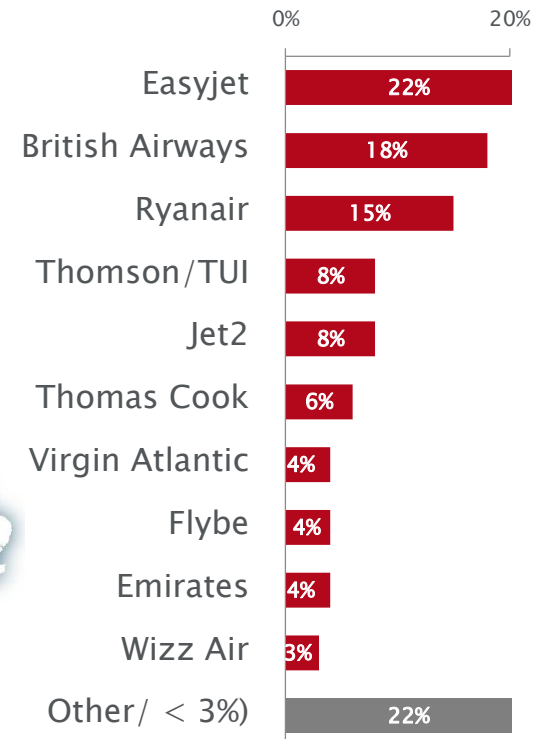
Domestic or International flight



Departure airport



Airline used



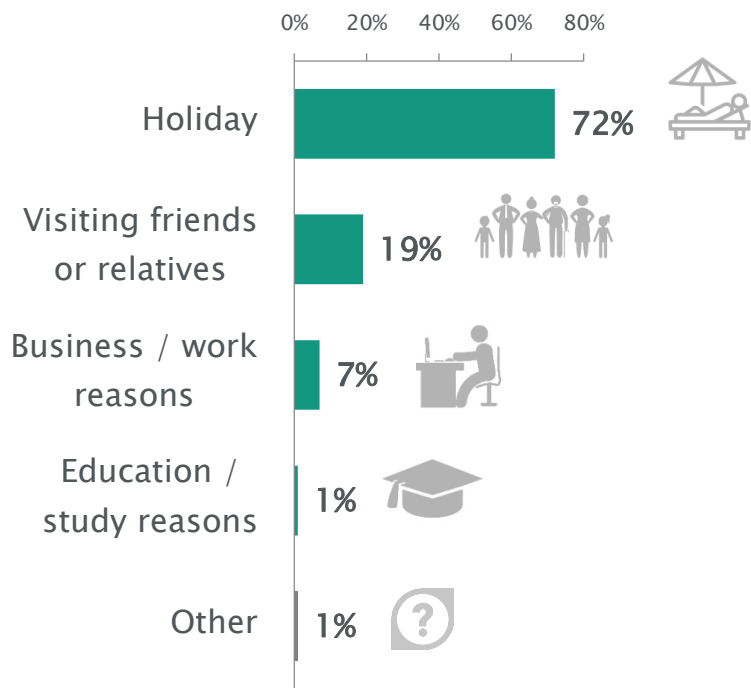
International short haul flights remain the most common among recent flyers accounting for 45% of flights. Flights tend to be from a few airports – Gatwick (16%), Heathrow (15%) & Manchester (15%) – and the most popular airlines are Easy Jet (22%), British Airways (18%) and Ryanair (15%).

The UK departure airport used by a passenger is unlikely to significantly impact satisfaction with the overall travel experience.

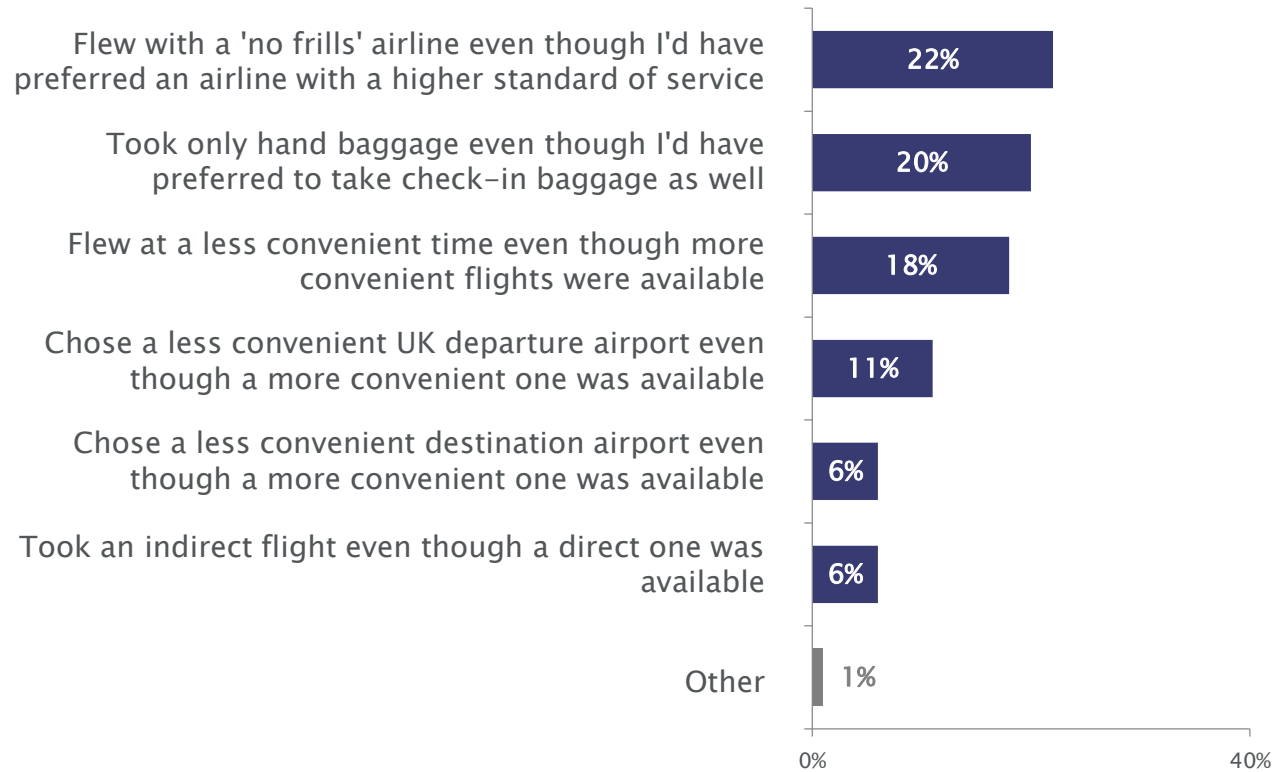
TO SAVE MONEY ON THEIR MOST RECENT FLIGHT, ONE IN FIVE ACCEPTED LOWER SERVICE, NO CHECK-IN BAGGAGE AND/OR INCONVENIENT FLIGHT TIMES



Main purpose for last flight



How passengers saved money on last trip

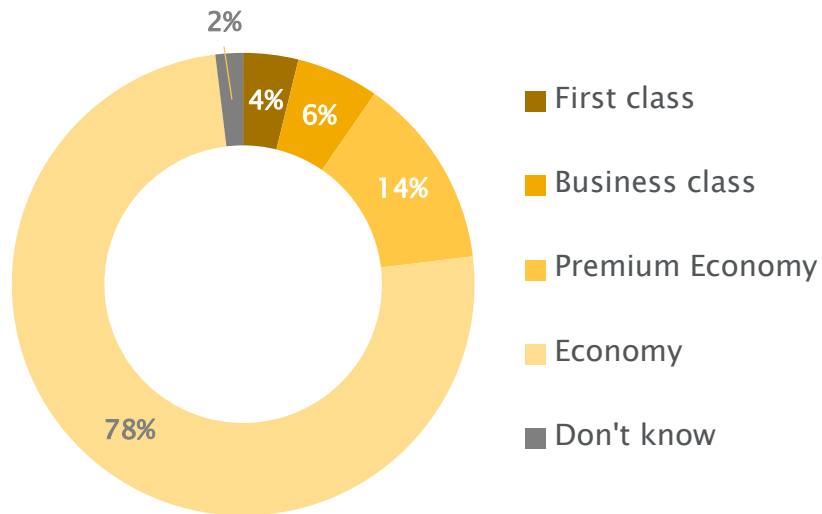


Holidays remain the primary reason for taking a flight (72%), followed by visiting friends or family (19%). In order to save money, around one in five flew with a no frills airline (22%), took only hand luggage (20%) and/or flew at a less convenient time (18%). Passengers are more likely to choose an inconvenient departure airport (11%) as opposed an inconvenient destination (6%) or an indirect flight (6%).

THE MAJORITY OF PASSENGERS FLY ECONOMY, WITHOUT CHILDREN

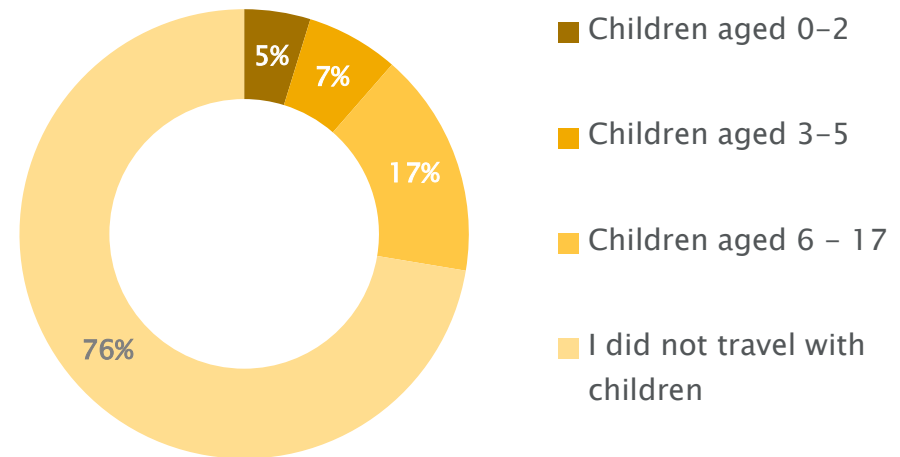
Cabin Class

% travelled in following cabin classes



Traveling with children on last flight

% by children's age



Though the majority of passengers (78%) travel Economy class, there are more passengers travelling in Premium Economy (14% in 2018 vs. 8% in Oct 2017) and First class (4% in 2018 vs. 1% in Oct 2017) than last year.

The proportion of people travelling with children has risen to nearly a quarter (from 20% in Oct 2017 to 24% in 2018) since Autumn 2017.

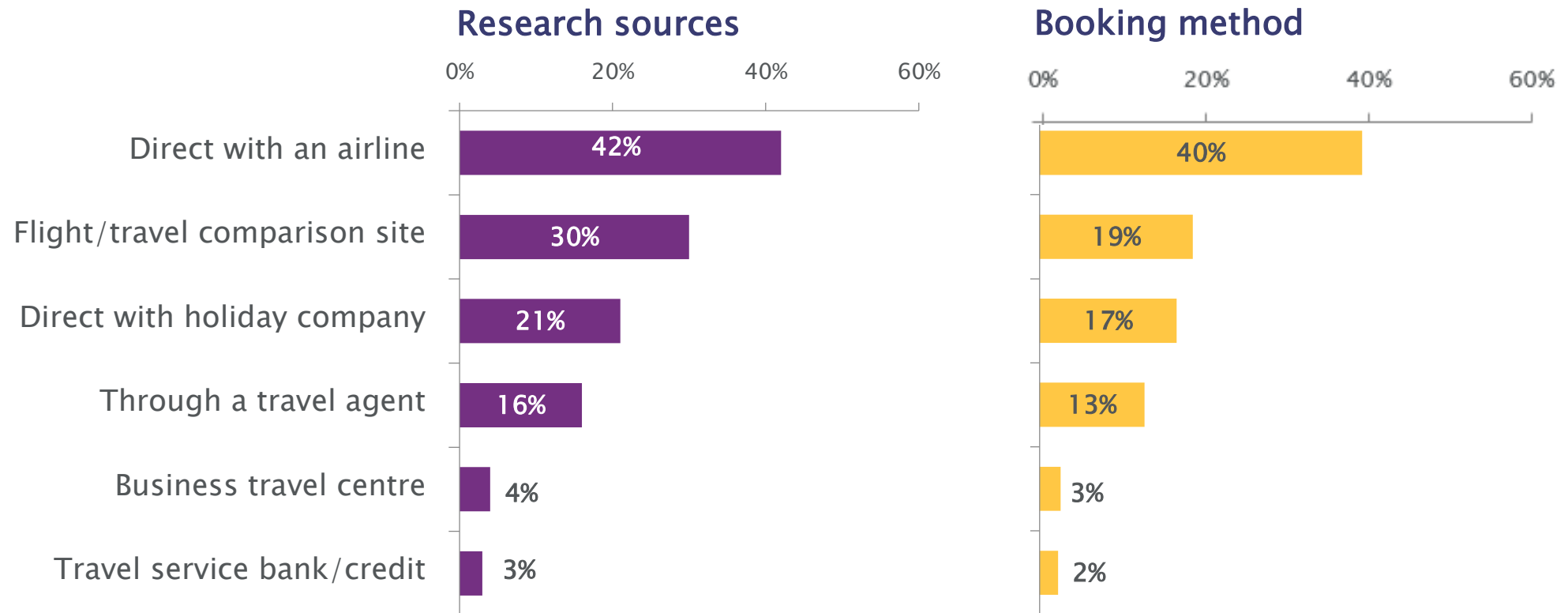
Travelling with dependents is not likely to impact satisfaction with the overall travel experience significantly.

Q20. Which cabin class did you travel in the last time you flew?

Q21. Did you travel with children on this occasion? Base: all who have flown in the last 12 months (n=1967)

TWO IN FIVE RESEARCHED AND BOOKED FLIGHTS DIRECTLY WITH THE AIRLINE THEY FLEW WITH

Last flight research/booking method



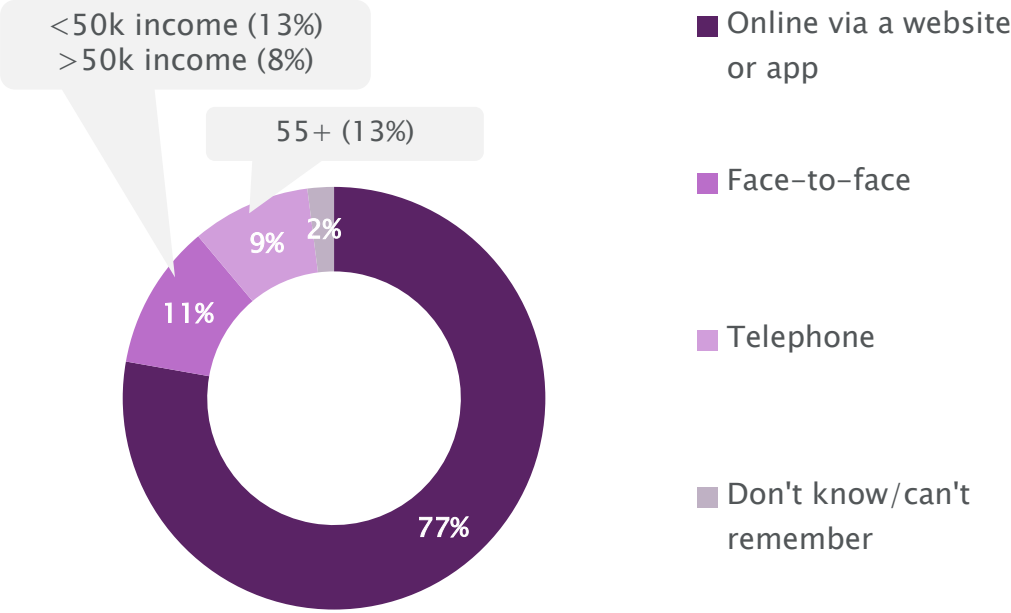
For the most part, passengers are likely to book using the same channel they used to research flights, the exception being comparison sites (which appear to be used by some for research before going on to book via a different method). 18–34 year olds are least likely to book directly with an airline (36% vs. 42% for those aged 55+); and more likely to use comparison sites than their older counterparts (27% vs. 15% 55+ yr. olds).

Q23. Which sources of information did you use when you were researching which flight to book?

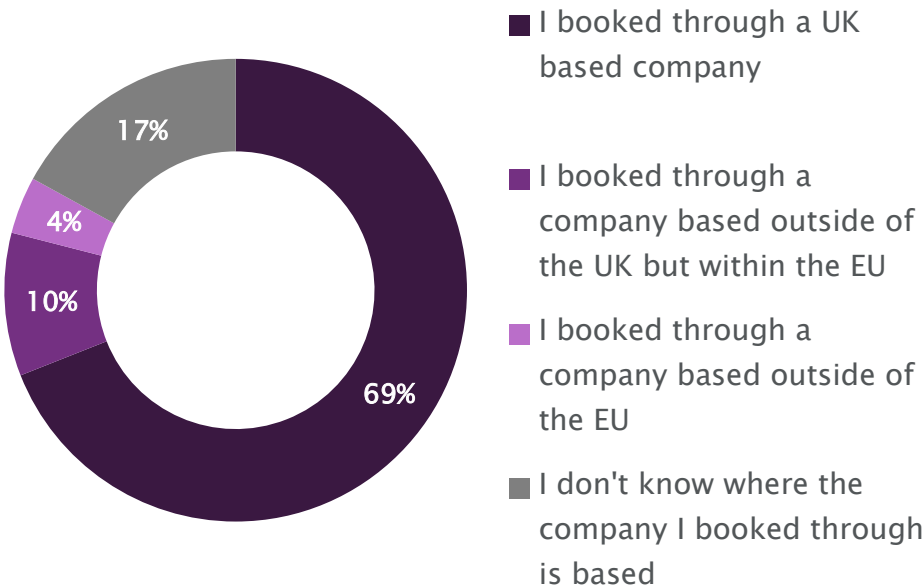
Q24a. How was this most recent flight booked? Base: all who have flown in the last 12 months (n=1967)

THE MAJORITY OF RESPONDENTS BOOKED ONLINE AND WITH UK BASED COMPANIES

Channel used to book last flight



Location of company used to book flights



Nearly four in five (77%) booked their flights through a website or app and more than two in three (69%) booked through a UK based company. Face-to-face bookings are more popular among those with lower income than a high income (50k+) and telephone bookings are used more by those aged 55+.

Q24b. How was this most recent flight booked? / Q25. When booking your trip, where was the company you booked through based?
 Base: all who have flown in the last 12 months (n=1967)

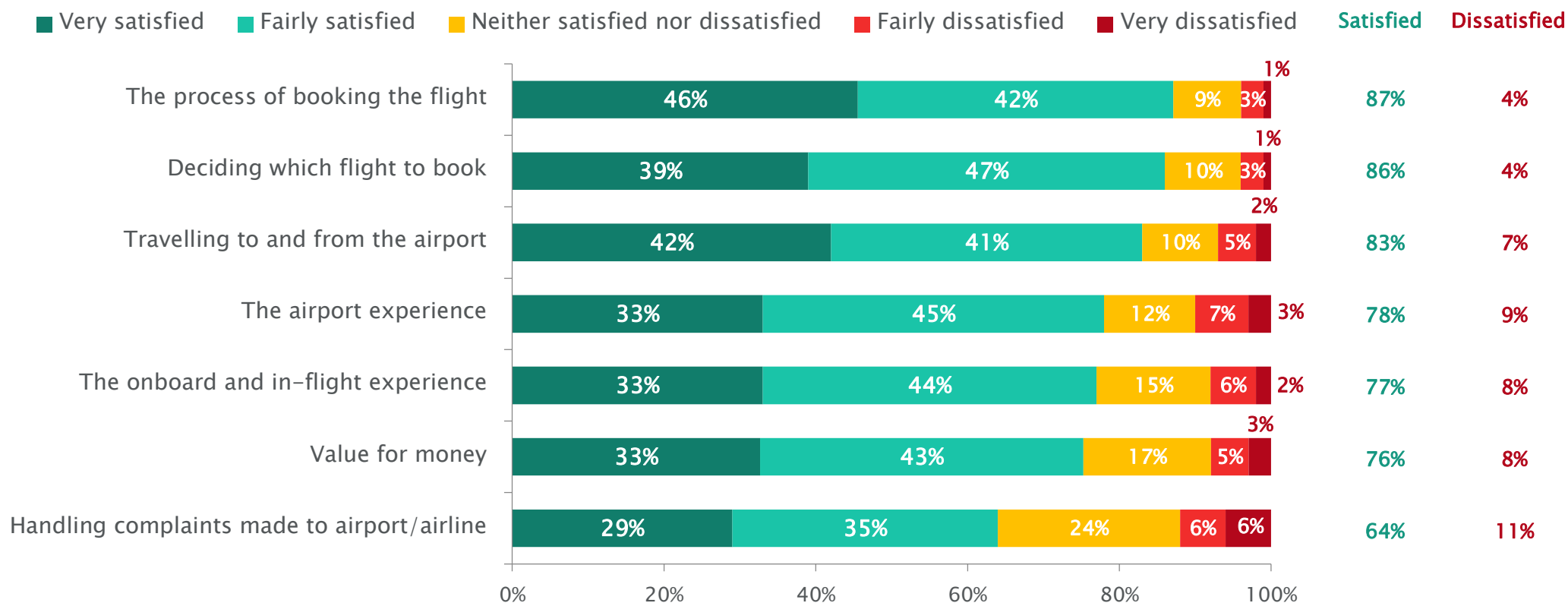
SECTION 3: RECENT EXPERIENCE



FLIGHT BOOKING, DECIDING ON A FLIGHT, AND TRAVELLING TO/FROM THE AIRPORT ARE THE MOST HIGHLY RATED ASPECTS OF THE FLYING EXPERIENCE

Last flight, satisfaction with elements of the journey (UK bookings and airports)

Showing all responses excluding 'don't know' and 'not applicable'



Passengers are likely to feel positively about various aspects of their most recent flying experience, particularly the process of booking the flight (87%), deciding which flight to book (86%), and travelling to and from the airport (83%). Those who report having made a complaint to their airport or airline are less likely to feel positively about the complaint-handling process than other elements of their trip, with two-thirds (64%) saying they feel satisfied with this element of their journey. It is worth noting that only one in ten (11%) say they are dissatisfied with complaint handling, and around a quarter (24%) say they feel ambivalent - neither satisfied nor dissatisfied.

YOUNGER ADULTS ARE LESS LIKELY TO BE SATISFIED WITH MOST ASPECTS OF THEIR MOST RECENT FLIGHT

Last flight, satisfaction with elements of the journey (UK bookings and airports)

Satisfied

The process of booking the flight	87%	▼ (18-34) 82%	▲ Scotland 94%	▼ Disabled passengers 83%
Deciding which flight to book	86%	▼ (18-34) 80%	▲ Scotland 91%	▼ Disabled passengers 80%
Travelling to and from the airport in the UK	83%	▼ (18-34) 79%	▲ West Midlands 88% ▲ North West 88%	▲ Scotland 94%
The airport experience in the UK	78%	▲ North East 86%	▼ East Midlands 71%	▼ Disabled passengers 73%
The onboard and in-flight experience	77%	▼ Disabled passengers 73%		
Value for money	76%	▼ (18-34) 71%	▲ Scotland 83%	
Handling of any complaints you made to the airport	64%	▼ (55+) 49%		

A SMALL MINORITY OF RESPONDENTS REPORTED STRUGGLING TO FIND OR UNDERSTAND INFORMATION WHEN RESEARCHING OR BOOKING FLIGHTS

Information hard to obtain or understand

Responses from those who reported struggling to find or obtain particular information (0.05%)

“I needed to use online check-in but couldn't find information as to whether we could do it with an infant who didn't have a ticket.”

“Getting seat booking is difficult and it was difficult coming back as we couldn't get any seat bookings on the way back.”

“We booked to leave on the 30th of November and they changed the dates without telling us.”

Online check-in
Booking
Seating
Charges
Delays
Baggage

“I prefer to have a record on my booking that disabled assistance has been booked but this is not shown on my booking records.”

“You click on each leg, but the whole cost is sort of hidden until the last minute, then you see it with tax etc added and it's a shock!”

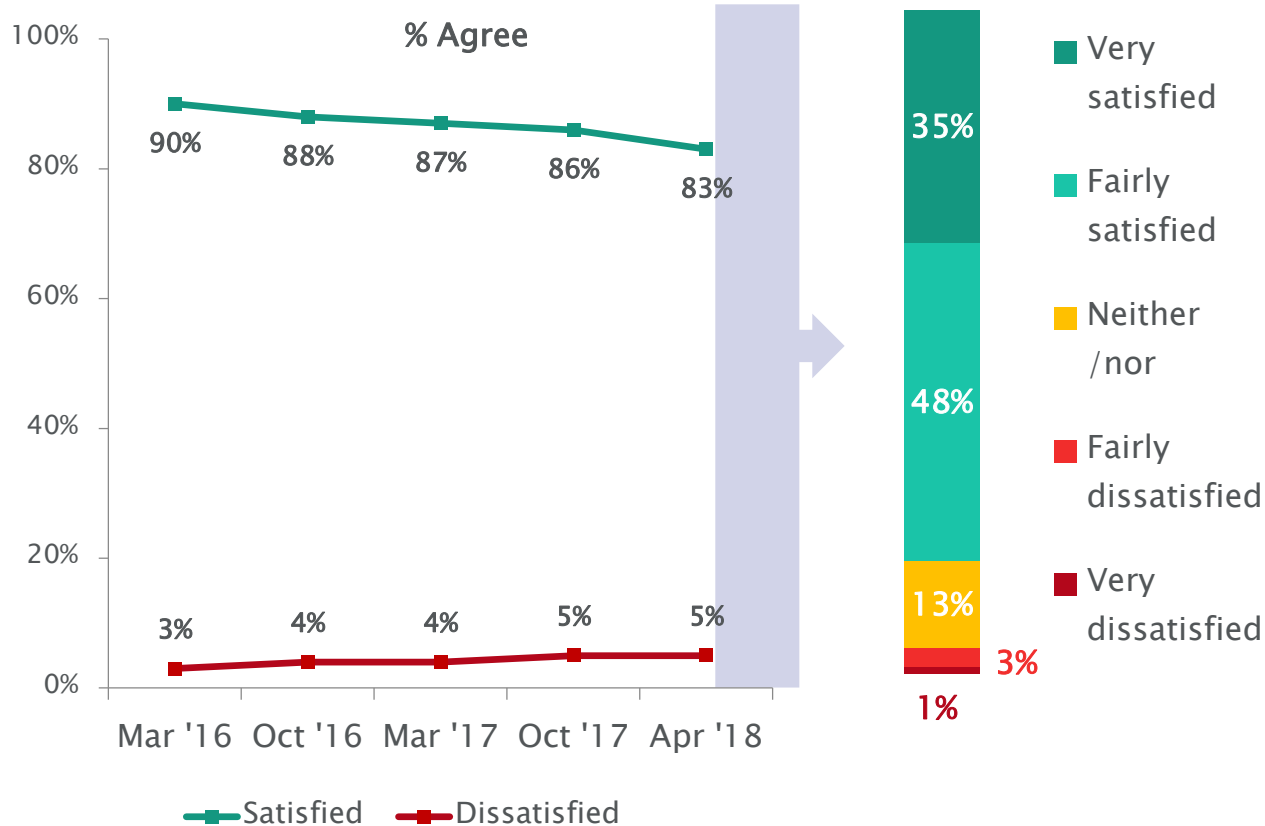
“Baggage allowance in cabin and hold was not entirely clear.”

Seats, booking, baggage (allowance) and charges were spontaneously mentioned as being hard to understand or find out about. Lack of information or clarity for disabled passenger assistance/ wheelchair assistance difficulties were also mentioned, particularly in Wales. Baggage-related information is more of an issue in Northern Ireland.

A CLEAR MAJORITY ARE SATISFIED WITH THE OVERALL TRAVEL EXPERIENCE, ALTHOUGH LEVELS HAVE DECLINED SINCE SPRING 2016

Last flight: Overall satisfaction

Overall satisfaction with travel experience



More than four in five recent flyers say they were satisfied with the overall travel experience during their last flight (83%), while a third were very satisfied with the overall experience (35%). Although levels of satisfaction remain high, there has been a slight decline since Spring 2016 (90%).

Younger respondents are slightly less likely to be satisfied with their overall travel experience than their older counterparts (79% 18-34 vs. 84% 35-54 and 85% 55+).

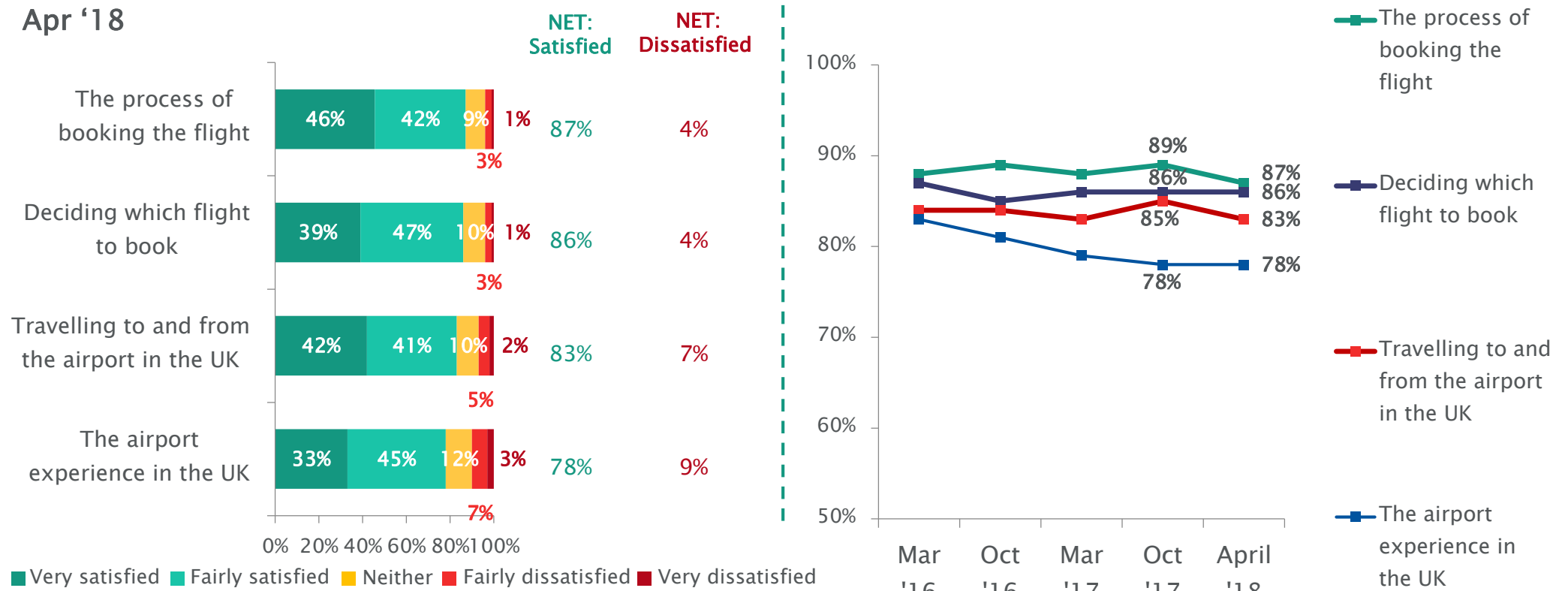
Those living in the North East (90%), North West (89%) and Scotland (88%) are more likely to be satisfied than those living in most other regions.

Disabled passengers are less likely than those without a disability to be satisfied with the overall travel experience of their last flight (78% vs. 84% respectively).

LEVELS OF SATISFACTION WITH THE TRAVEL EXPERIENCE IN THE UK HAVE REMAINED BROADLY IN LINE WITH THOSE FROM THE PREVIOUS WAVE

Last flight: Satisfaction with elements of the journey

Apr '18



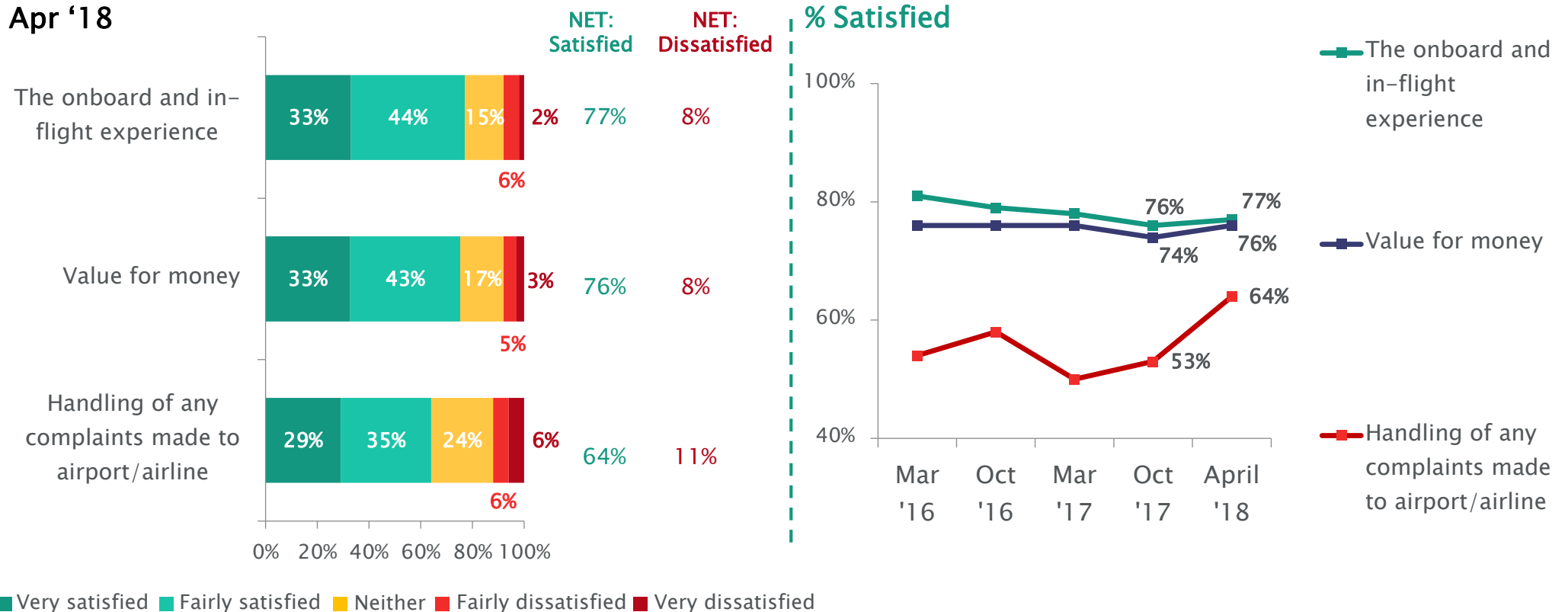
When thinking about their most recent flight, the clear majority of those who have flown in the last 12 months say they were satisfied with the travel experience in the UK. More specifically, at least eight in ten were satisfied with the process of booking the flight (87%), deciding which flight to book (86%), travelling to and from the airport in the UK (83%), and the airport experience in the UK (78%). This is broadly in line with opinions recorded in the previous wave of research.

Q27. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight. When answering please think about both the outward and return legs of the flight, including any transfers. How satisfied or dissatisfied were you with the following elements?
 Base: All who have flown in the last 12 months (excluding DK and NA responses) n=1 896-1952

THERE HAS BEEN A SIGNIFICANT INCREASE IN LEVELS OF SATISFACTION WITH THE HANDLING OF COMPLAINTS MADE TO THE AIRPORT/AIRLINE

Last flight: Satisfaction with elements of the journey

Apr '18



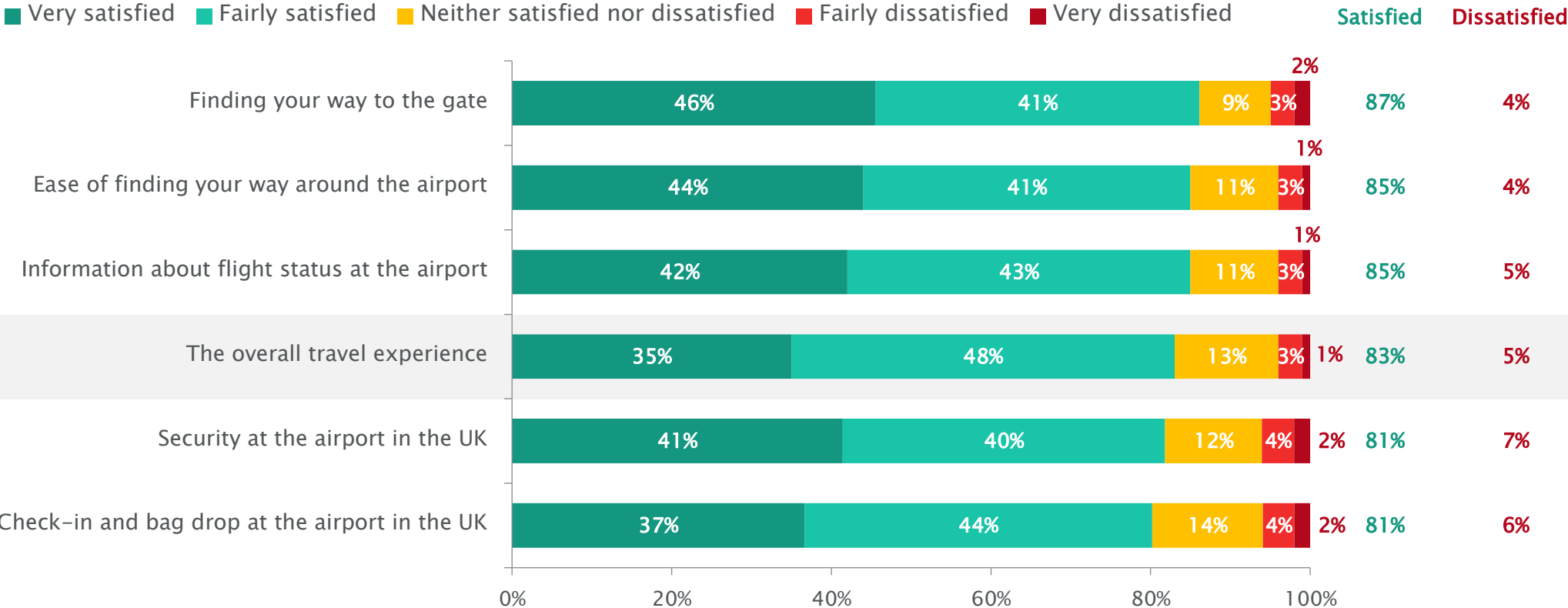
A majority of those who have flown in the last 12 months were satisfied with the onboard and in-flight experience (77%), value for money (76%), or the handling of any complaints made to the airport/airline (64%). There has been a significant increase in levels of satisfaction regarding the handling of complaints made to the airport/airline (64% vs. 53% in Autumn 2017), while levels of satisfaction with the other two aspects has remained constant.

Q27. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight.
 Base: All who have flown in the last 12 months (excluding DK and NA responses) n=827-1957

FOUR IN FIVE SAY THEY ARE SATISFIED WITH THE OVERALL TRAVEL EXPERIENCE OF THEIR LAST FLIGHT

Last flight satisfaction with airport experience (UK) – Part 1

Showing all responses excluding 'don't know' and 'not applicable'



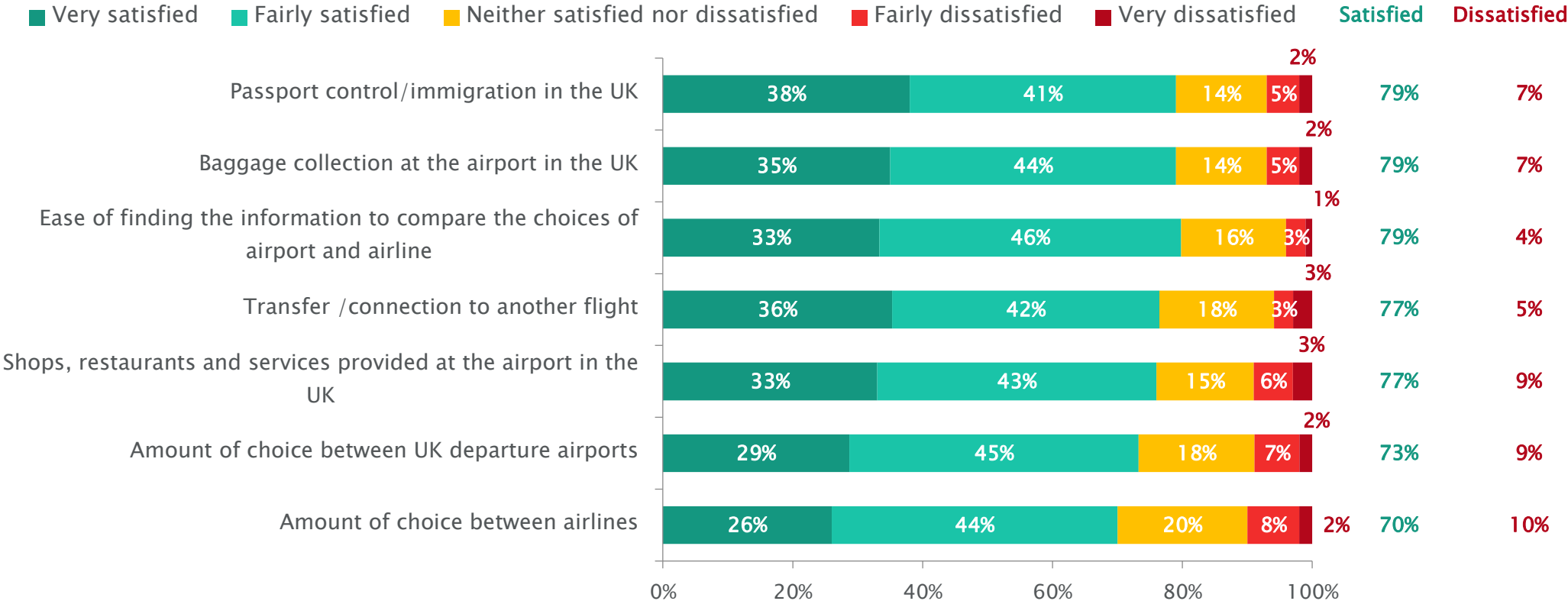
When asked about specific aspects of their most recent flight, passengers were most likely to feel positively about navigating their way around the airport: 87% say they were satisfied with finding their way to the gate, 85% with finding their way around the airport (with ease), and 85% were satisfied with the way they saw information about their flight status at the airport. The overall travel experience is also rated highly with 83% reporting satisfaction and only 5% reporting dissatisfaction – though this figure is lower than in previous waves of this research.

Q28. 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, excluding DK and NA responses (n=1967)

COMPARED TO OTHER ASPECTS OF THE AIRPORT EXPERIENCE, CONSUMERS ARE LEAST SATISFIED WITH THE AMOUNT OF CHOICE BETWEEN UK AIRLINES AND AIRPORTS

Last flight satisfaction with airport experience (UK) – Part 2

Showing all responses excluding 'don't know' and 'not applicable'



Baggage services, and security service (including passport control) see slightly lower levels of satisfaction. As seen on the previous page, 81% were satisfied with security when taking their last flight and with check-in/bag drop service. Similarly, 79% report satisfaction with passport control/immigration in the UK as well as baggage collection at their UK airport. The elements of a journey likely to see the lowest levels of passenger satisfaction are related to choice: choice between shops/restaurants services provided in UK airport (77% satisfied), choice between UK airports (73% satisfied) and between airlines (70%) satisfied.

Q28. 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 (n=1967)

YOUNGER ADULTS ARE ALSO LESS LIKELY THAN OLDER ADULTS TO BE SATISFIED WITH EACH ASPECT OF THE AIRPORT EXPERIENCE IN THE UK

Last flight satisfaction with airport experience (UK)

Satisfied

Finding your way to the gate	87%	▼ (18-34) 80%	
Ease of finding your way around the airport	85%	▼ (18-34) 79%	▲ South West 93%
Information about flight status at the airport	85%	▼ (18-34) 81%	▲ (55+) 89%
Security at the airport	81%	▼ (18-34) 75%	▲ Scotland 86%
Check-in and bag drop at the airport	81%	▼ (18-34) 74%	
Passport control/immigration	79%	▼ (18-34) 74%	▲ White 81%

OLDER ADULTS ARE MORE LIKELY TO BE SATISFIED WITH MOST ASPECTS OF THE AIRPORT EXPERIENCE

Last flight satisfaction with airport experience (UK)

Satisfied

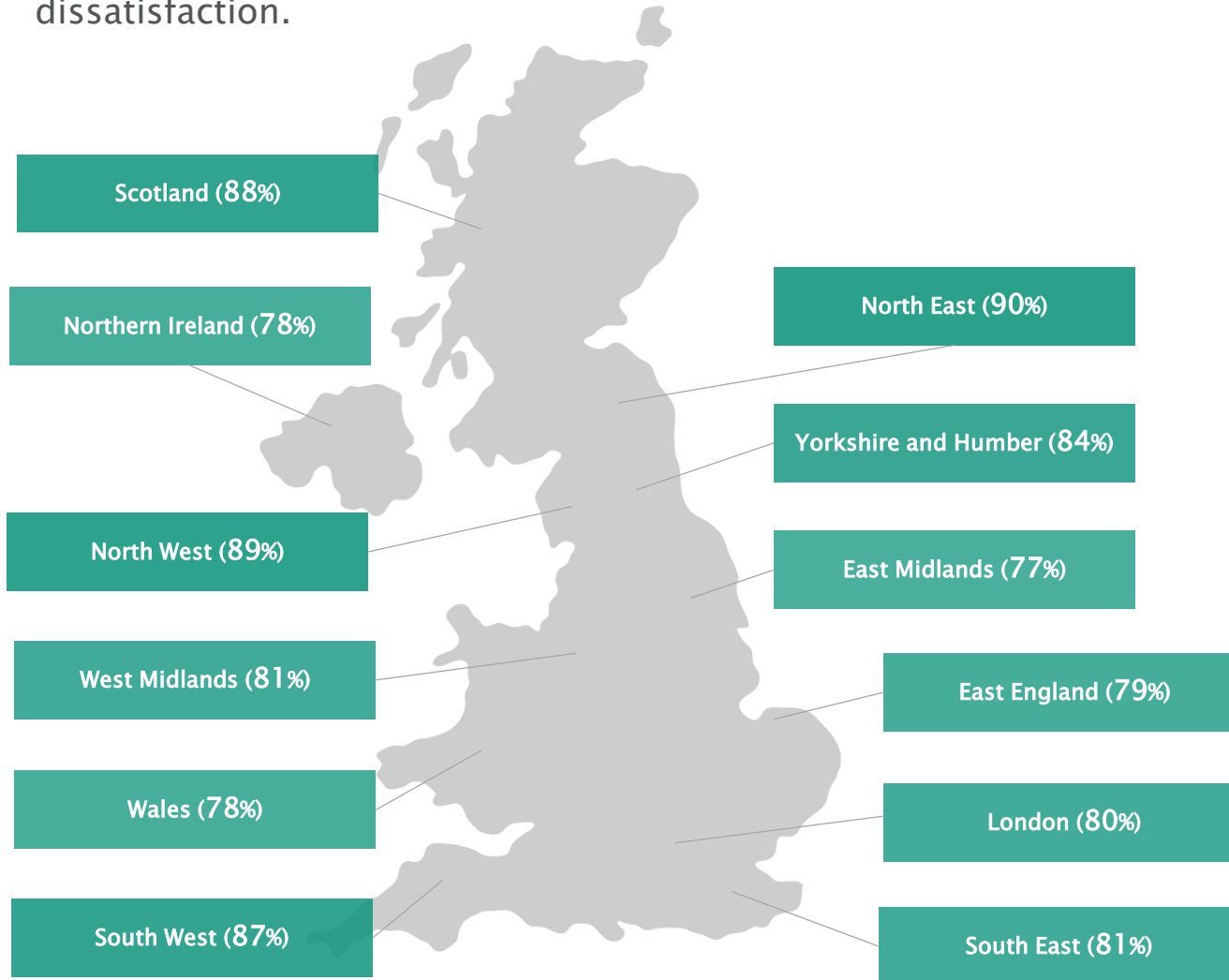
Ease of finding the information to compare the choices of airport and airline	79%	
Baggage collection at the airport in the UK	79%	▼ (18-34) 74%
Shops, restaurants and services provided at the airport	77%	▲ Scotland 82%
Transfer /connection to another flight	77%	▼ (18-34) 71% ▲ (55+) 83%
Amount of choice between UK departure airports	73%	▲ (35-54) 78%
Amount of choice between airlines	70%	▲ Black / Black British 91%

Q28. 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 (excluding DK and NA responses) n=959-1906

PASSENGERS LIVING IN THE NORTH EAST ARE MOST LIKELY TO BE SATISFIED WITH THEIR OVERALL TRAVEL EXPERIENCE

Last flight: Satisfaction with overall travel experience, regional breakdown

83% of UK passengers report satisfaction with the overall travel experience on their last flight, and only 5% report dissatisfaction.



Passengers flying from the North East, North West, Scotland and the South West are most likely to report satisfaction with the overall travel experience when thinking about their last flight.

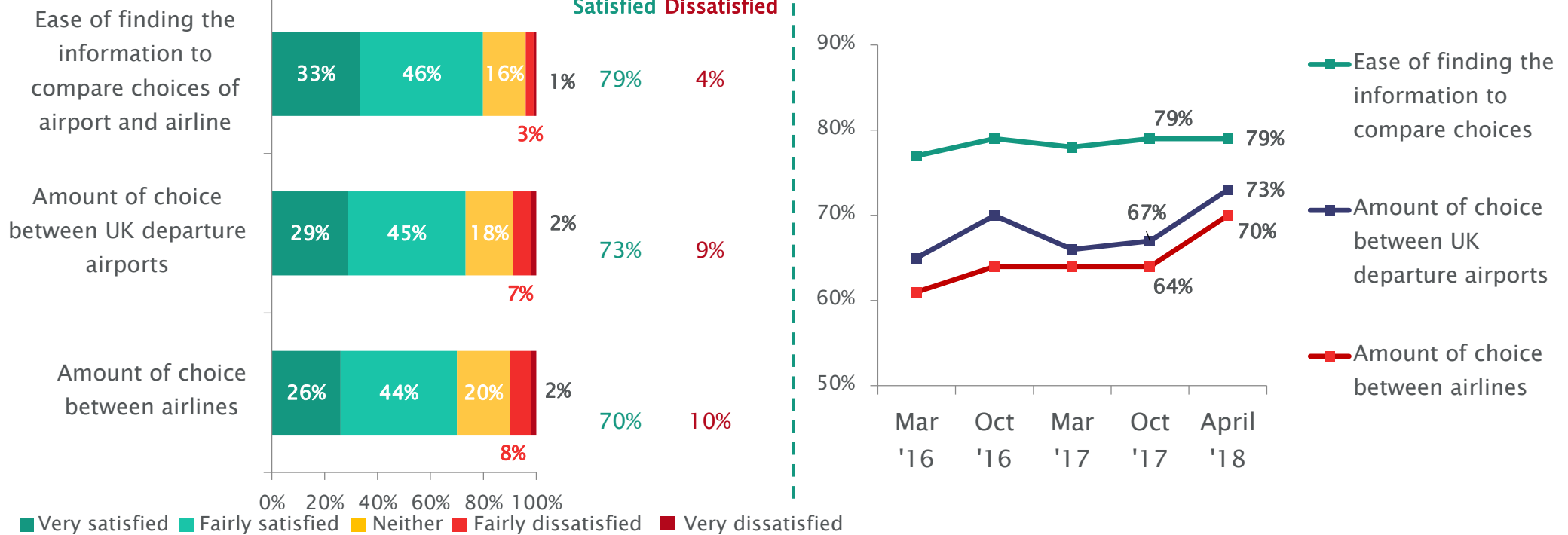
Nine in ten Passengers from the North East say they were satisfied with the overall travel experience (90%), as with those living in the North West (89%). 88% of Scottish residents report satisfaction, and 87% of those in the South West also report satisfaction.

The difference in satisfaction between regions is comparatively low. The regions with lowest satisfaction are the East Midlands (77%) and Wales (78%). London sits in between, with four out of five passengers saying they were satisfied with their overall travel experience on their most recent flight (80%).

SATISFACTION WITH THE AMOUNT OF CHOICE BETWEEN UK AIRPORTS AND CHOICE BETWEEN AIRLINES HAS INCREASED SINCE AUTUMN 2017

Last flight: Satisfaction with elements of pre-booking

Apr '18

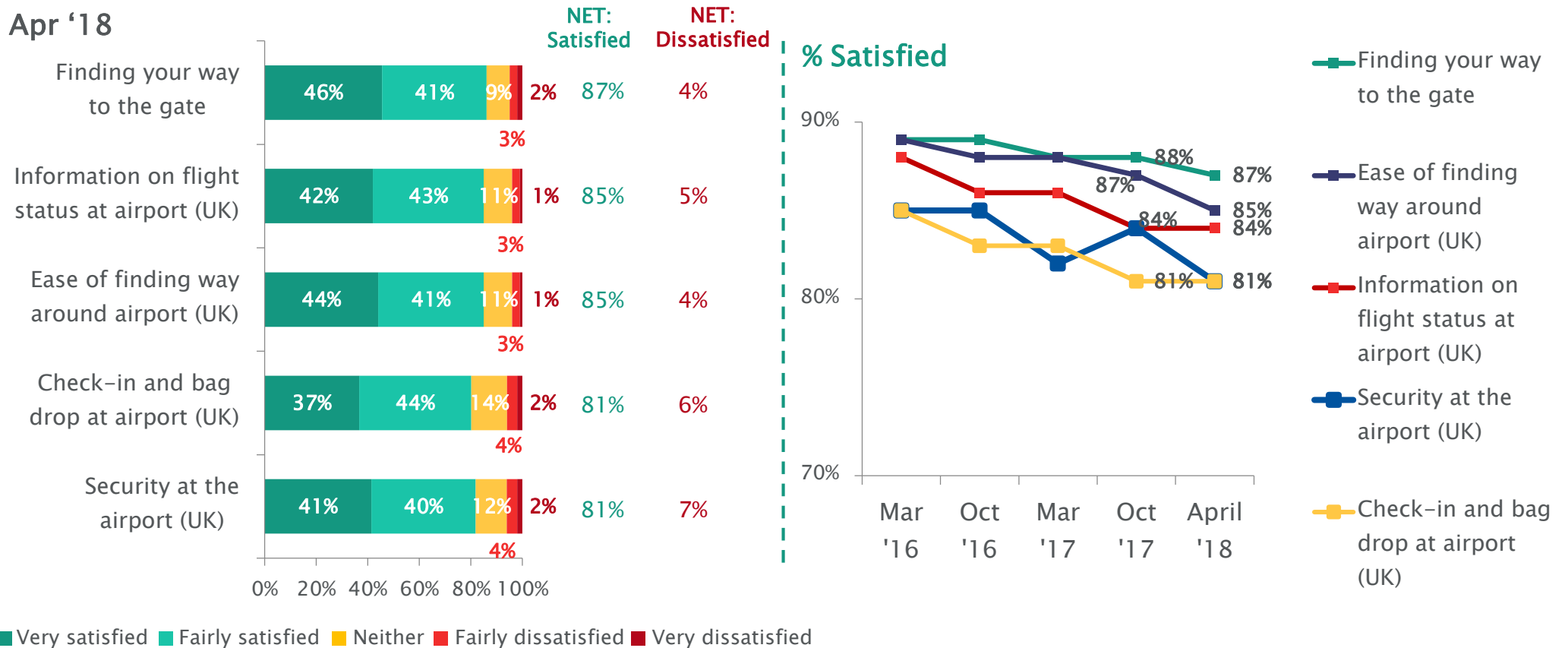


The majority of recent flyers say they were satisfied with each element of the pre-booking process for their most recent flight, particularly the ease of finding information to compare choices of airport and airline (79%). This is in line with levels recorded in Autumn 2017 (79%), while satisfaction with the amount of choice between UK departure airports and the amount of choice between airlines has increased (73% vs, 67% in Autumn 2017 and 70% vs. 64% in Autumn 2017 respectively).

LEVELS OF SATISFACTION WITH THE AIRPORT EXPERIENCE ARE RELATIVELY HIGH AND REMAIN RELATIVELY CONSISTENT WITH AUTUMN 2017

Last flight: Satisfaction with airport experience

Apr '18



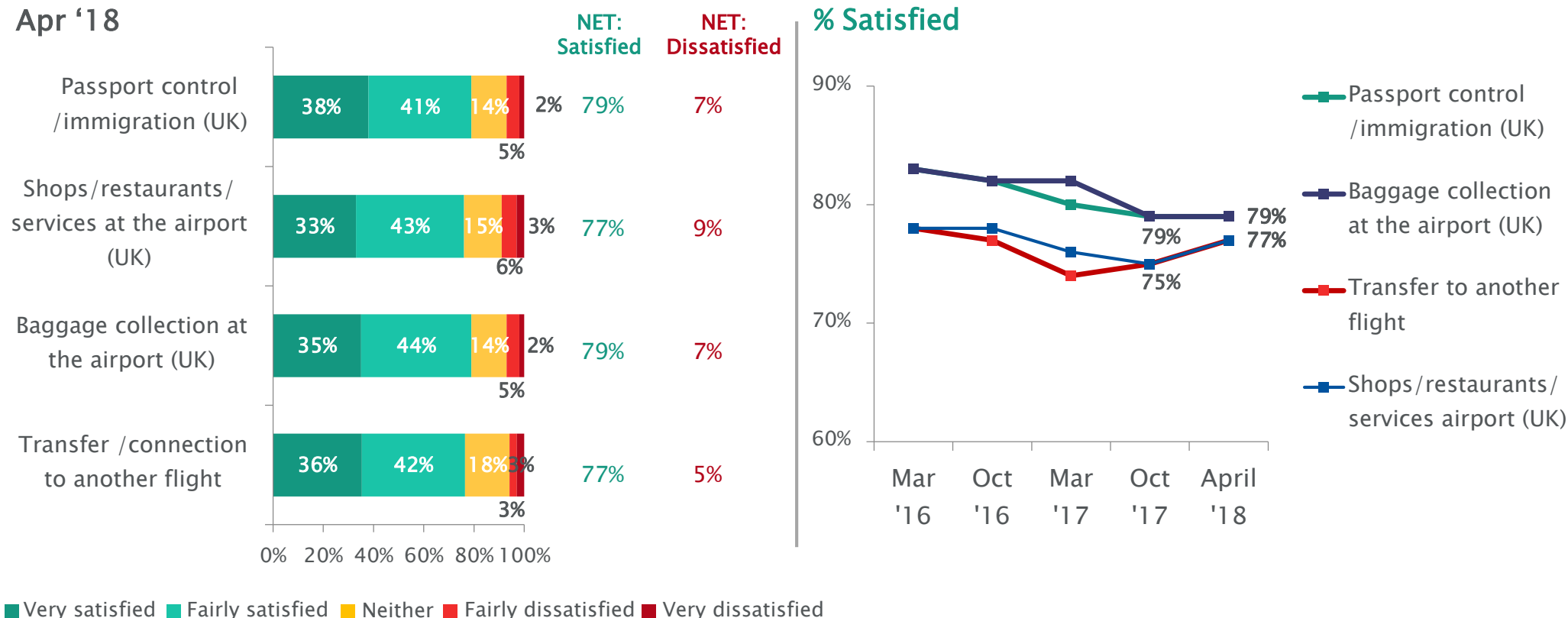
Levels of satisfaction with the airport experience are high, with at least eight in ten adults who have flown in the last 12 months being satisfied with each of the aspects tested. Only a small minority are dissatisfied with any of the aspects. While levels of satisfaction in this wave remain consistent with Autumn 2017, satisfaction has nevertheless declined slightly since to Spring 2016 when tracking began.

Q28. 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 those who have flown in the last 12 months (excluding DK and NA responses) n=1867-1950

IN LINE WITH AUTUMN 2017, THE MAJORITY OF RECENT FLYERS ARE SATISFIED WITH THEIR AIRPORT EXPERIENCE

Last flight: Satisfaction with airport experience

Apr '18



The majority of UK adults who have flown in the last 12 months say they were satisfied with each aspect of the airport experience, with levels of satisfaction recorded for each remaining in line with those reported in Autumn 2017.

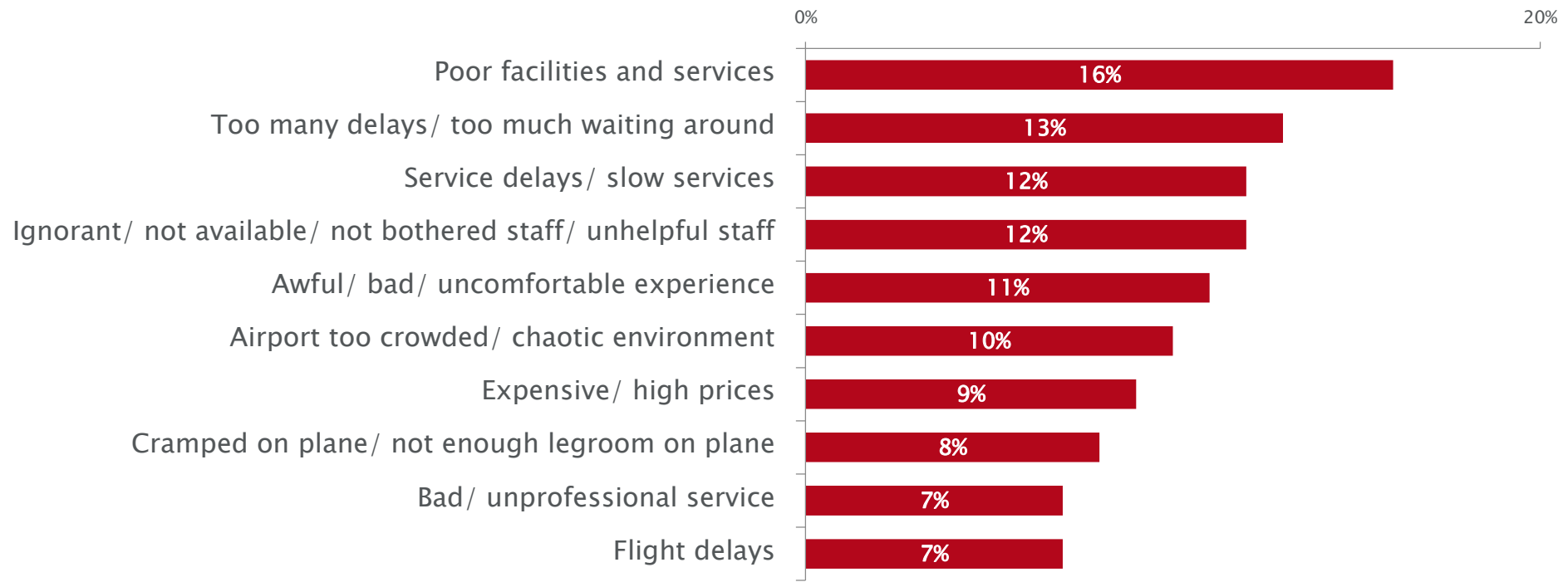
Q28. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied were you with the following elements? Base: All those who have flown in the last 12 months (excluding DK and NA responses) n=959-1906

THE QUALITY AND/OR CONDITION OF FACILITIES AND SERVICES IS LIKELY TO BE DRIVING DISSATISFACTION WITH THE OVERALL EXPERIENCE

Understanding dissatisfaction with travel experience

Coded open-text responses, showing all responses of 7% +

% who were dissatisfied with their overall travel experience (on last flight) on reasons they were dissatisfied



The issue most likely to be driving dissatisfaction is poor condition/quality of facilities and services, with 16% of respondents who were dissatisfied citing this as their primary reason. Passengers are also likely to have had a negative experience due to experiencing too many delays or long waits (13%) – possibly due to slow services (another 12%). The proportion of passengers reporting dissatisfaction with ignorant or unhelpful staff is worth noting, with 12% of those who say they were dissatisfied attributing this to issues with staff.

Q29. Why were you dissatisfied with the overall travel experience? Please tell us about any issues you had.
Base: all who have flown in the last 12 months and were dissatisfied with the overall experience (n=93)

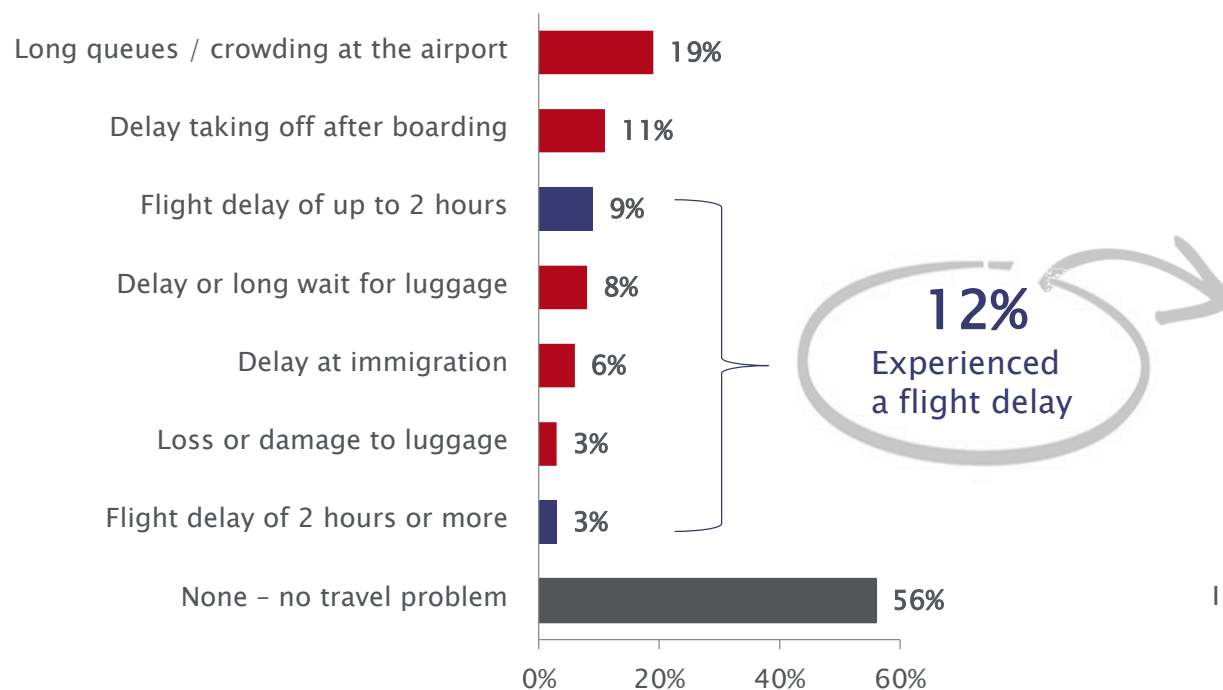
**SECTION 3a: TRAVEL
DISRUPTION**



LONG QUEUES / CROWDING AT THE AIRPORT WAS THE MOST COMMONLY EXPERIENCED TRAVEL ISSUE AMONG RECENT FLYERS. MORE THAN HALF OF RESPONDENTS DIDN'T HAVE ANY TRAVEL PROBLEMS

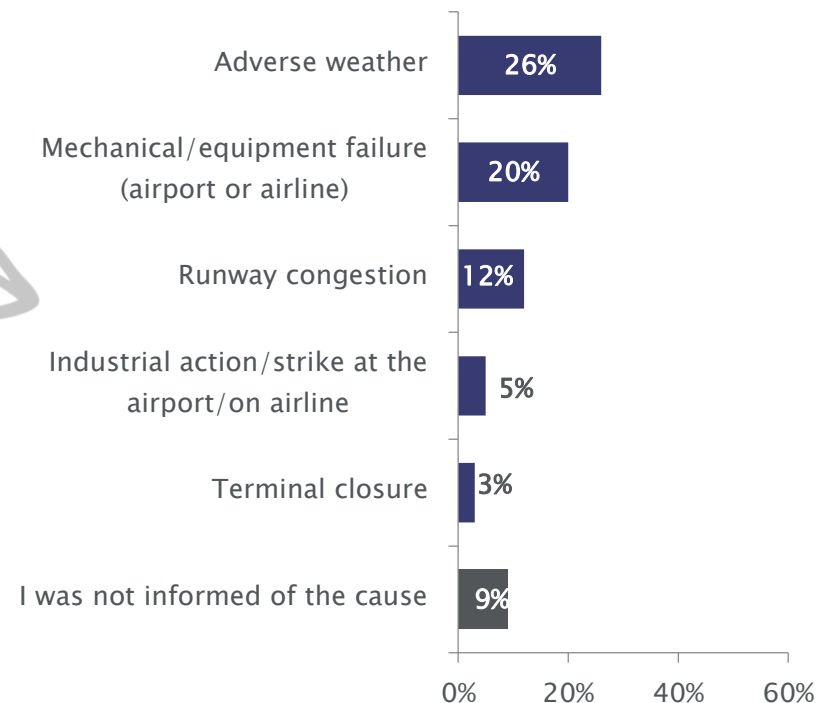
Experience of travel issues

% who say they experienced each of the following during their most recent flight



Causes of flight delays

% who say their flight delay was caused by each of the following



Showing all results 3% and above

Overall, more than half of those who have flown in the last 12 months did not experience a travel issue during their most recent journey (56%). In line with the previous wave of research, recent flyers who have flown in the last 12 months are most likely to have experienced long queues and/or crowding at the airport of the issues tested (19% vs. 19% in Spring 2017).

12% of recent flyers experienced a flight delay during their most recent journey. Those who experienced such a flight delay are most likely to say that this was due to adverse weather (26%) or a mechanical / equipment failure (20%).

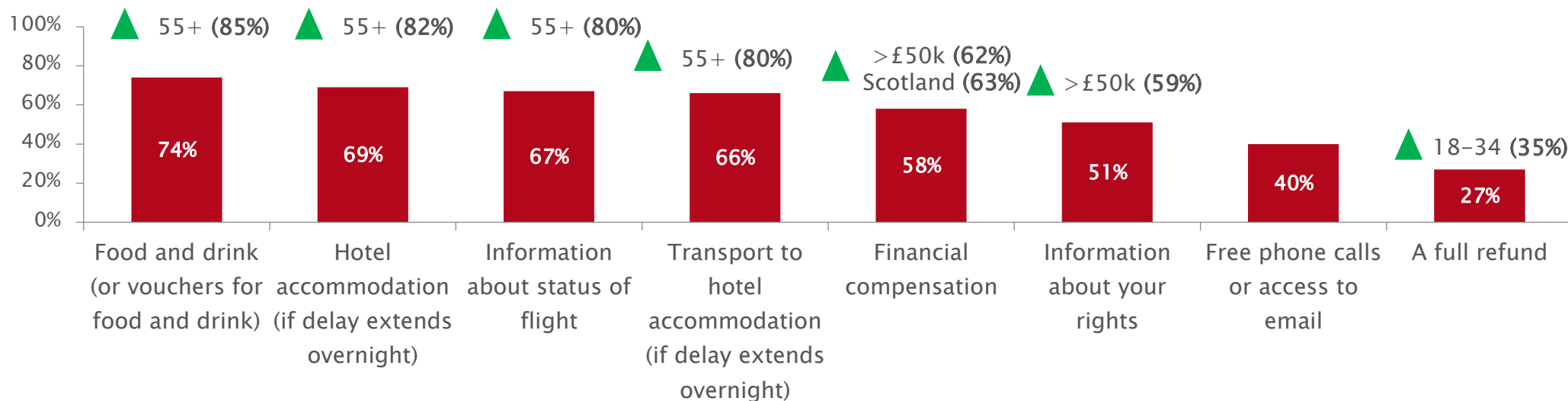
Q33. During this most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=1967)

Q34. What was the cause of the delay to your recent flight? Base: All who have flown in the last 12 months and experienced a flight delay (n=244)

IN THE EVENT OF A DELAY OF MORE THAN THREE HOURS ON A SHORT-HAUL FLIGHT, UK ADULTS ARE MOST LIKELY TO SAY THAT THE AIRLINE SHOULD PROVIDE IMMEDIATE FORMS OF REDRESS

Types of redress which should be provided by an airline in the event of a delay of more than three hours on a short haul flight

Showing % who said each of the following



NOTE: PASSENGER RIGHTS IN THE EVENT OF A DELAY

If there is a 3 hour delay on a short haul flight from a UK airport, passengers would be entitled to:

- Information about their rights
- Food and drink (or vouchers)
- Two free phone calls or access to e-mail
- Hotel accommodation (if the delay is overnight)
- Transfer to and from hotel (if the delay is overnight)

Airlines have no specific legal obligation to provide information about the status of a flight, but have an obligation to provide the assistance in the left hand column when they expect a delay to be more than 2 hours.

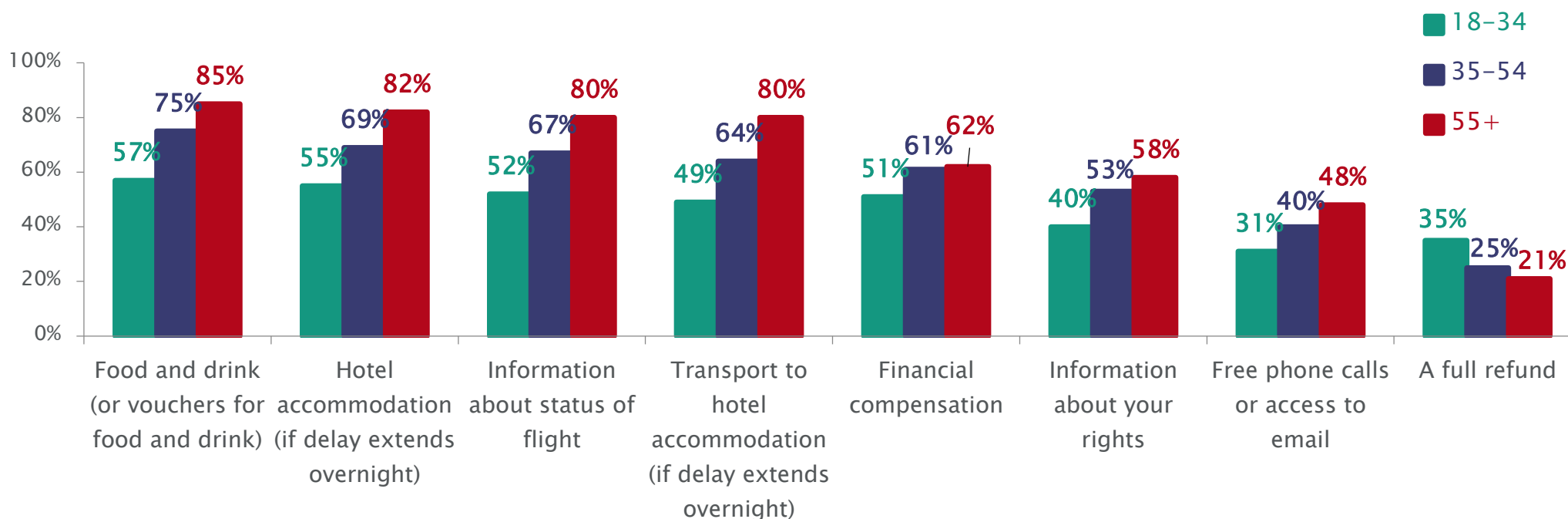
Financial compensation is not applicable in all circumstances. This depends on the reason for the delay – if it is an extraordinary circumstance, such as bad weather, financial compensation is not payable.

If a delay due to a technical fault on the aircraft or an operational reason, then compensation will typically be payable. The legal obligation to provide a refund only applies after a delay of 5 hours.

OLDER UK ADULTS ARE MORE LIKELY THAN THEIR YOUNGER COUNTERPARTS TO SAY THAT THEIR AIRLINE SHOULD PROVIDE MOST OF THE THINGS TESTED IN THIS SITUATION

Types of redress which should be provided by an airline in the event of a delay of more than three hours on a short haul flight – **by age group**

Showing % who said each of the following



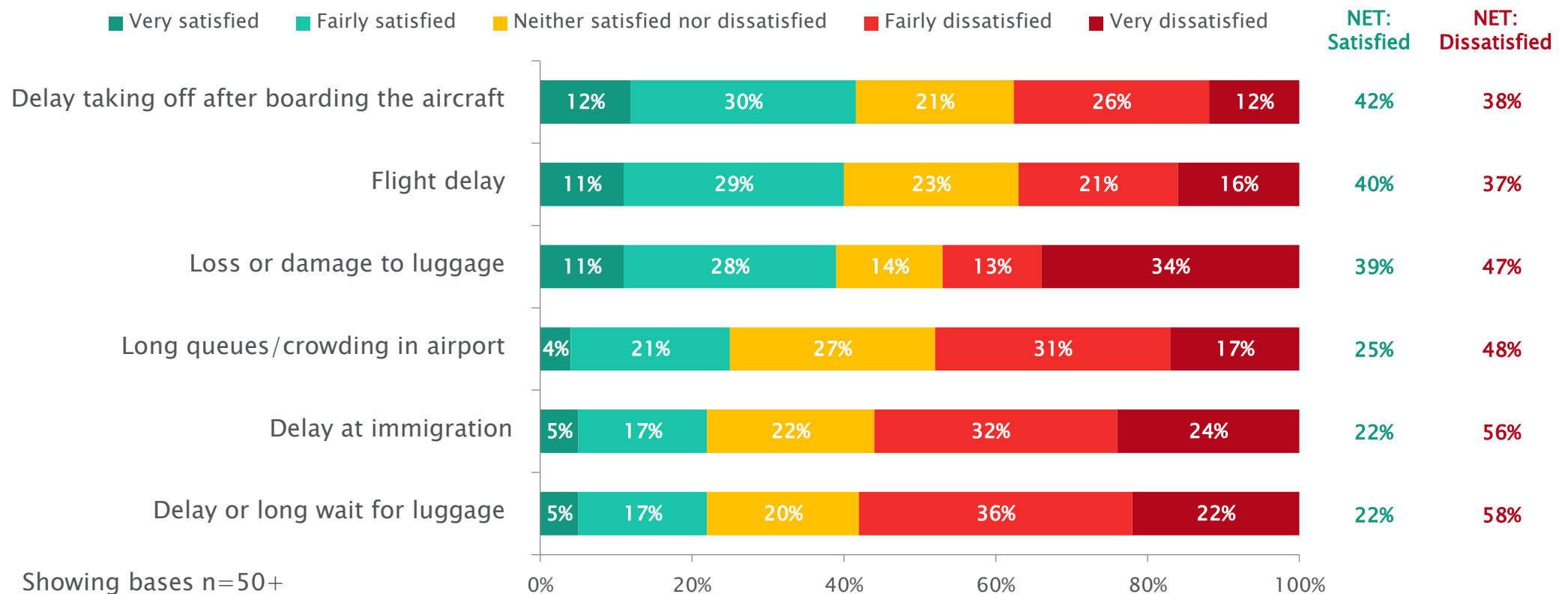
Older UK adults (those aged 55+) are more likely than their younger counterparts (aged 18-34) to say that their airline should provide them with each of the items tested in the event of a delay of more than three hours, with the exception of a full refund (35% 18-34 vs. 21% 55+).

This trend is particularly prominent regarding immediate reforms of redress, namely food and drink (85% 55+ vs. 57% 18-34), hotel accommodation (82% 55+ vs. 55% 18-34), information about the status of the flight (80% 55+ vs. 52% 18-34) and transport to hotel accommodation (80% 55+ vs. 49% 18-34).

LEVELS OF SATISFACTION WITH HOW EACH TRAVEL ISSUE WAS HANDLED ARE LOW, PARTICULARLY FOR DELAYS AT IMMIGRATION AND BAGGAGE COLLECTION

Satisfaction with how each travel issue was handled

Showing % who said they were satisfied or dissatisfied with each of the following



Overall, only a minority of recent flyers who experienced each issue were satisfied with how it was handled. More specifically, respondents are least likely to say they were satisfied with how issues beyond the flight itself were handled, namely long queues or crowding in the airport (25%), delays at immigration (22%) and delays or long waits for luggage (22%). Although they are more likely to have been satisfied with how loss or damage to luggage was handled (39%), levels of dissatisfaction were particularly strong among those affected by this. A third (34%) say that they were very dissatisfied with how this issue was handled.

Q35. How satisfied or dissatisfied were you with the way your travel issue was handled overall? Base: All those who have flown in the last 12 months and experienced each issue (excluding DK responses) n=62-362

POOR ORGANISATION AND LACK OF COMMUNICATION ARE CITED AS THE MAIN REASONS FOR BEING DISSATISFIED WITH THE WAY A TRAVEL ISSUE WAS HANDLED

Reasons for being dissatisfied with the way a travel issue was handled

FLIGHT DELAY / DELAY TAKING OFF AFTER BOARDING

Dissatisfaction with the handling of a flight delay or delay taking off after boarding is usually driven by a lack of official communication from the airport or airline giving a reason for the delay, or insufficient updates regarding the status of the flight.

“At no point did anyone from the airline or airport communicate the reason for the delay.”

“After initially being told that there was a 'small' delay while waiting for a bus to disembark, no further announcement was given for over an hour whilst we waited on the plane.”

“I was left waiting on the plane for two hours and was not told by anyone how long we would be waiting or what the problem was.”

LONG WAIT FOR / LOST OR DAMAGED LUGGAGE

Similarly, dissatisfaction with the way a long wait for luggage was dealt with tends to be due to a lack of information on the cause of the delay. Passengers whose luggage was lost or damaged tend to be dissatisfied due to a lack of compensation.

“I went from Glasgow to London to Hong Kong to Saigon. My luggage went to London. The next day it went to Hong Kong. The next day it went to Saigon. I feel some basic form of compensation should be offered automatically in such circumstances. I should not have to apply for it, especially during a holiday when it has already impacted on my stay, without spending more time filling out forms.”

“We had to wait nearly two hours for our luggage without even an apology.”

QUEUES / CROWDING AT THE AIRPORT

Visible disorganisation, the absence of airport staff, and unopened immigration / check in desks are cited as reasons for being dissatisfied with how queues or crowding at the airport were handled.

“Just shambles – should be more efficient as we’re paying for this, including the immigration service!”

“No one was trying to make it better. There were closed desks, even when there were massive queues.”

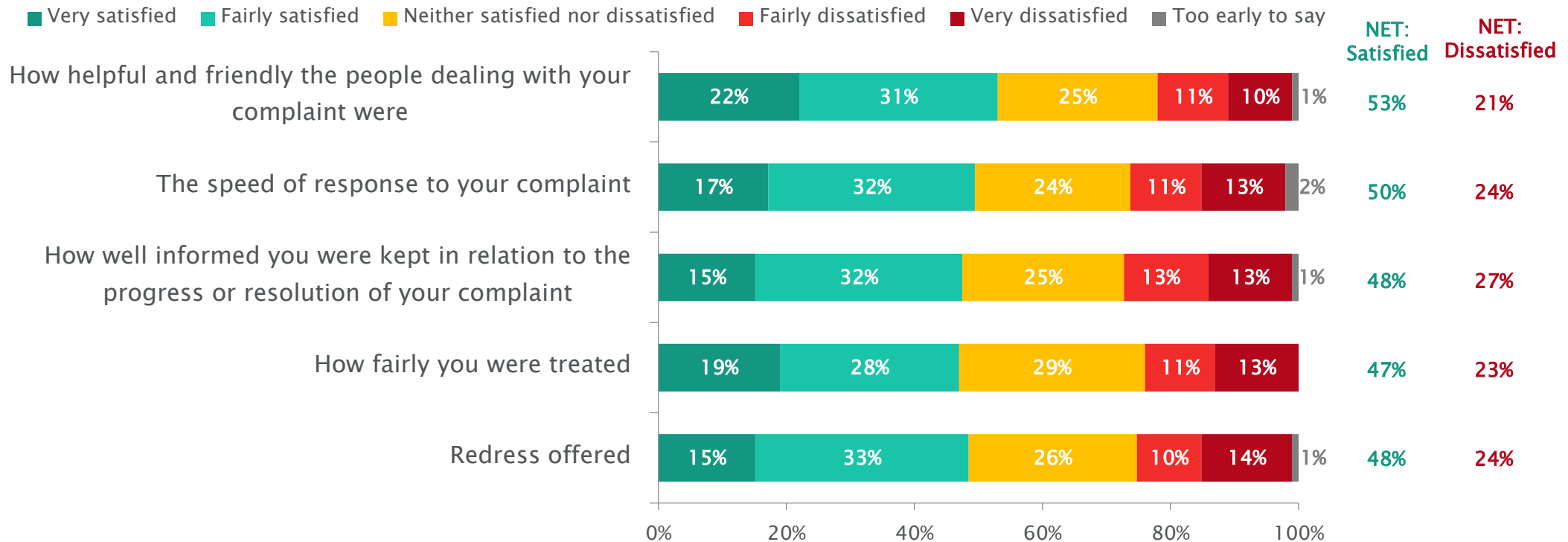
“There weren't enough check in counters/staff to accommodate the process, resulting in long line ups to check in and overcrowding.”

RECENT FLYERS ARE MORE LIKELY TO BE SATISFIED THAN DISSATISFIED WITH HOW THEIR COMPLAINT WAS HANDLED

53% of those who have flown in the last 12 months and experienced a travel issue made a complaint.

Satisfaction with how a complaint about a travel issue were handled

Showing % who said they were satisfied or dissatisfied with each of the following

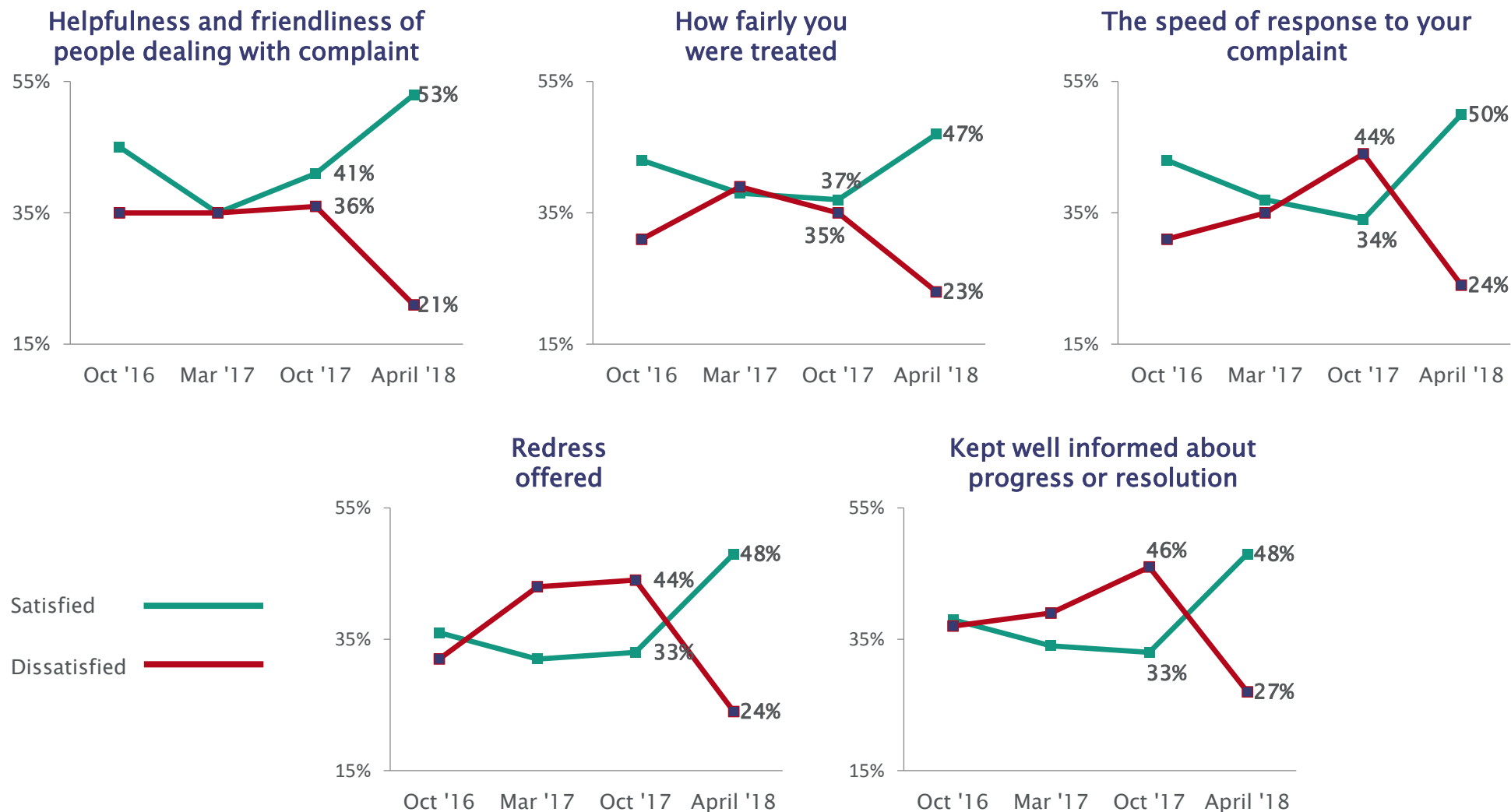


Around half of recent flyers who made a complaint say they were satisfied with how each aspect of their complaint was handled, although at least a fifth were dissatisfied. They were most likely to be satisfied with how helpful and friendly people dealing with their complaint were (53%). On the other hand, they were most likely to be dissatisfied with how well informed they were kept in relation to the progress or resolution of their complaint (27%).

Q37. How satisfied or dissatisfied were you with each of the following aspects in terms of your flight issue(s)? 'Outcome of any complaints you made to the airport, airline or holiday company about the travel issue' Base: All those who have flown in the last 12 months and experienced a travel issue (n=838); Q38. Thinking more specifically about any complaints you made to the airport, airline or holiday company about the travel issue, how satisfied or dissatisfied were you with each of the following aspects? Base: All those who have flown in the last 12 months and made a complaint about a travel issue they experienced (excluding DK responses) n=405-417

SATISFACTION WITH HOW COMPLAINTS ARE HANDLED HAS INCREASED CONSIDERABLY COMPARED TO AUTUMN 2017

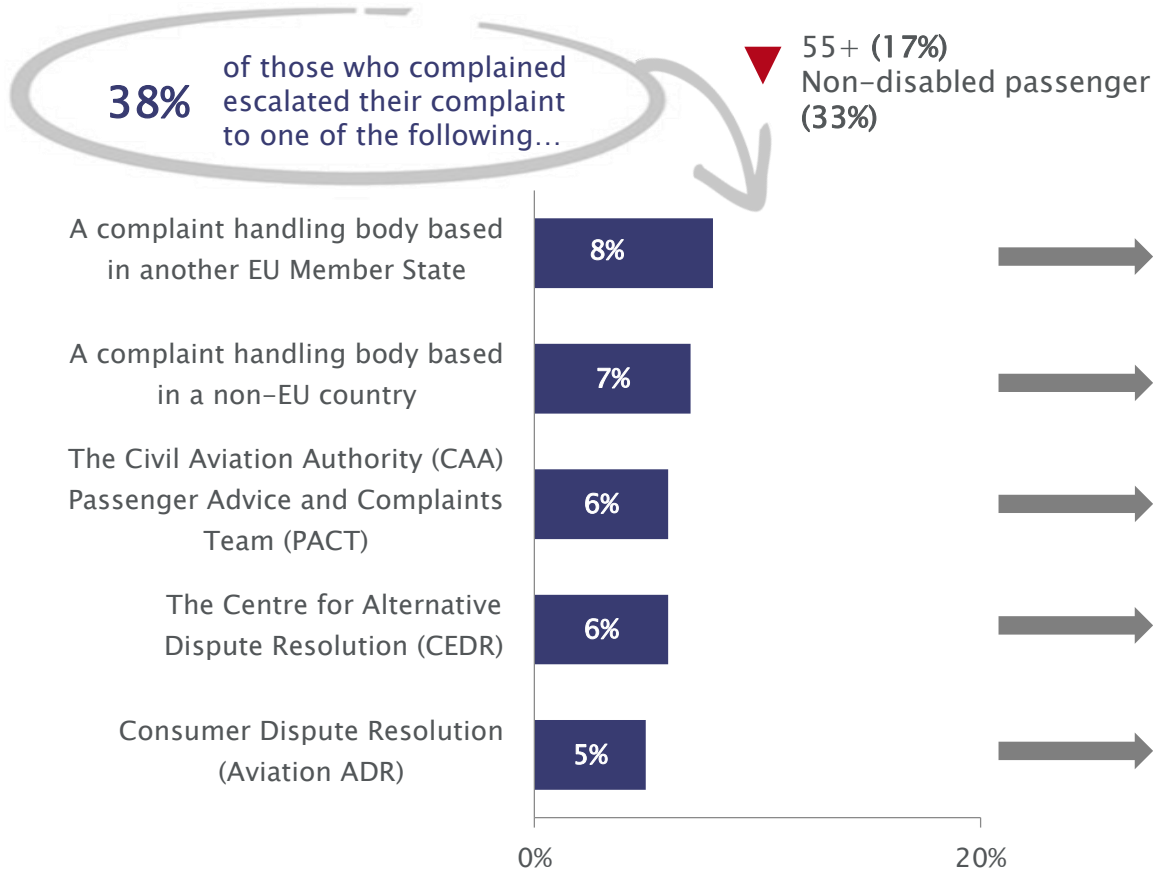
Satisfaction with complaint handling



Q38. Thinking more specifically about any complaints you made to the airport, airline or holiday company about the travel issue, how satisfied or dissatisfied were you with each of the following aspects? Base: All those who have flown in the last 12 months and made a complaint about a travel issue they experienced (excluding DK responses) n=405-417

TWO IN FIVE RECENT FLYERS WHO MADE A COMPLAINT ABOUT A TRAVEL ISSUE ESCALATED THIS TO AN ALTERNATIVE DISPUTE RESOLUTION (ADR) PROVIDER

Escalating complaint to an ADR



Satisfaction with how the complaint was handled*

NET: Satisfied

NET: Dissatisfied

19/36

9/36

14/28

4/28

15/24

5/24

18/26

3/26

15/23

0/23

*Raw numbers shown due to a low base size for those who escalated their complaint to each ADR

Two in five recent flyers who complained about a travel issue they experienced escalated their complaint to an ADR (38%), and similar proportions escalated their issue to each of the ADRs tested. Those who complained to the ADRs listed above are more likely to be satisfied than dissatisfied with how each complaint was handled.

Q39. Did you escalate your complaint or problem to any of the following organisations after your recent flight experience? Base: All those who have flown in the last 12 months and made a complaint about a travel issue they experienced (n=428) / Q40. Overall how satisfied or dissatisfied with the way your complaint was handled by ... Base: All those who escalated their complaint to respective ADR (n=23-36)*

SECTION 4: DISABILITY

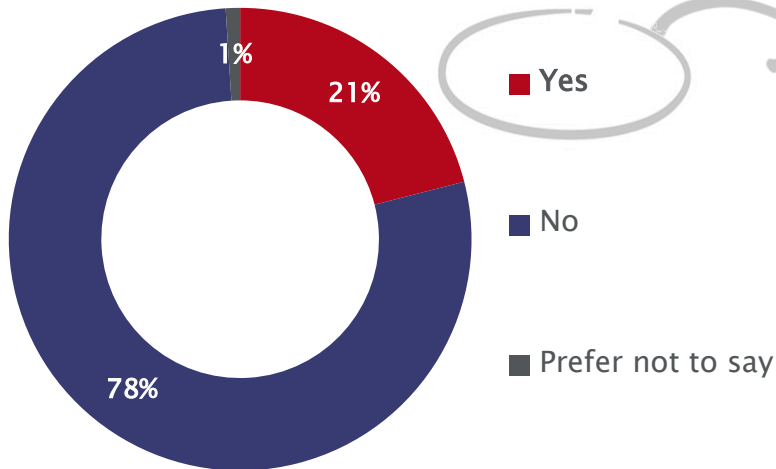


ONE IN FIVE UK ADULTS HAS A LIMITING DISABILITY OR HEALTH CONDITION, AND OVER HALF OF THOSE WITH SUCH A CONDITION FIND FLYING DIFFICULT

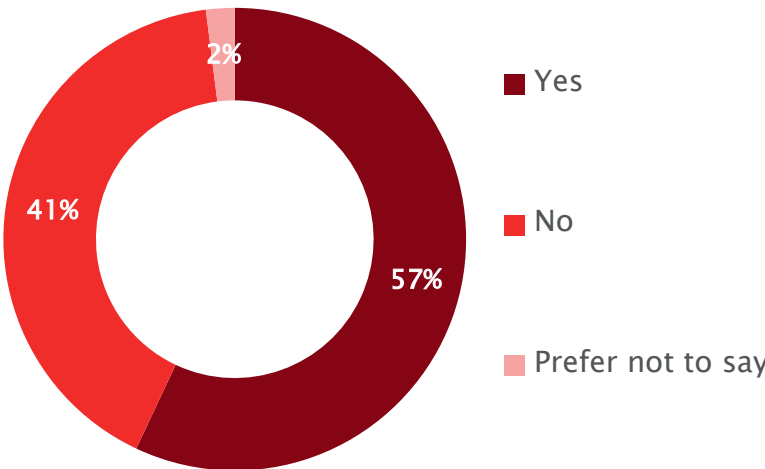
“Do you have any disability or health condition that limits your day-to-day activities?”

It could include a physical disability or health condition (e.g. affecting your movement, balance, vision or hearing) or a non-physical disability or health condition (e.g. affecting thinking, remembering, learning, communications, mental health or social relationships).”

Disability
% that have a disability



Difficulty in accessing/using airports or find flying difficult
% finding it difficult

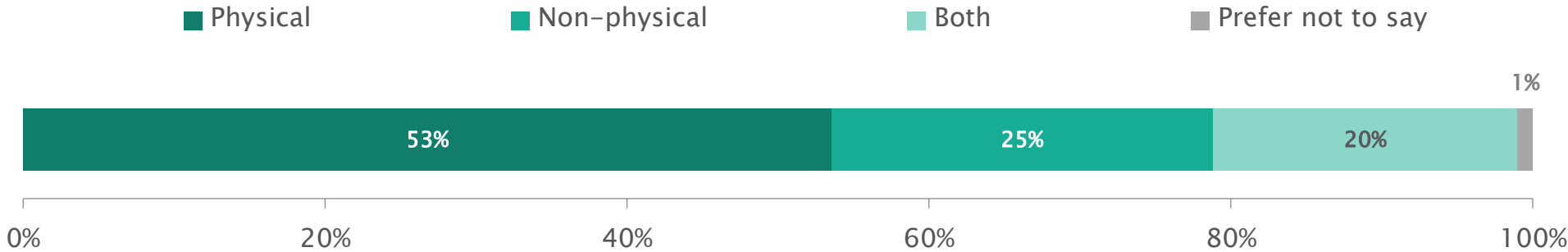


One in five UK adults say they have a disability or health condition (one that limits day-to-day activities as per the description outlined above) – 21% of respondents. Of those who would describe themselves as having a disability, 57% say they find accessing or using airports difficult, and/or find flying difficult in general. This is broadly in line with findings from the previous wave of research run in October 2017.

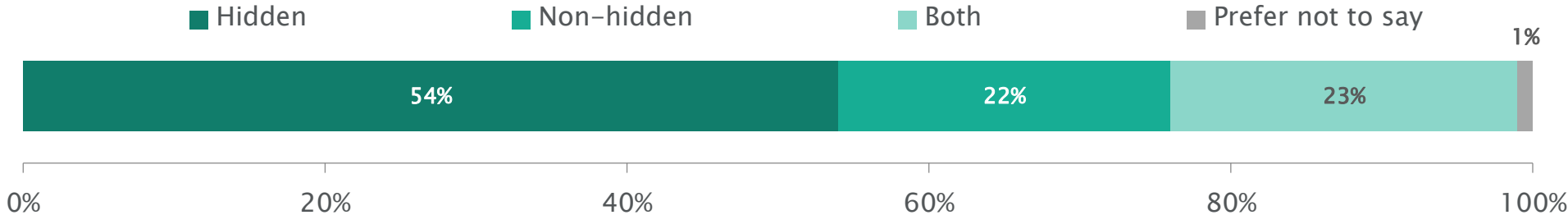
Q7. Do you have any disability or health condition that limits your day-to-day activities? Base: all respondents (n=3500) (*The CAA is reviewing the terminology it uses for both consistency and inclusivity.*)
 Q8. Does your disability or health condition make accessing and/or using airports or flying difficult? Base: all who have a disability (n=734)

THE MAJORITY OF DISABLED PEOPLE SURVEYED ONLINE SAY THEIR CONDITION IS PHYSICAL; A SIMILAR PROPORTION SAY THEIR CONDITION IS HIDDEN

Disabled with a physical or non-physical condition



Hidden or non-hidden disability

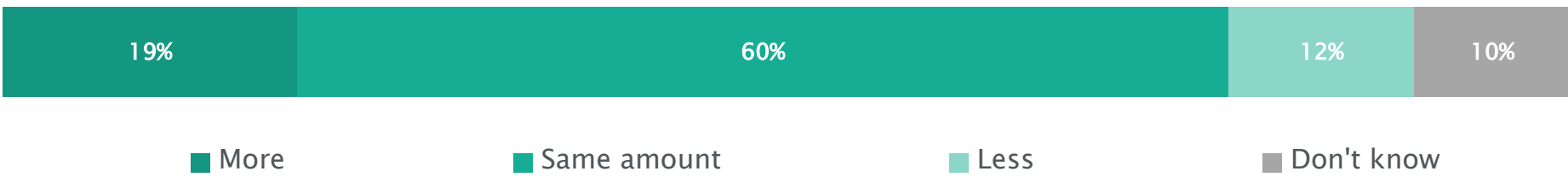


53% of those who describe themselves as having a disability or health condition that limits their day-to-day activities say their condition is physical only. A quarter say their condition is non-physical (25%), while one in five say it is both (20%). A similar proportion (54%) say their disability is a hidden one, 22% say theirs is not. Nearly a quarter say their disability or condition is both (23%).

Q9. Do you have any disability or health condition that limits your day-to-day activities?
Q10. Would you consider your disability to be a hidden or a non-hidden disability? Base: all who have a disability (online only) (n=652)

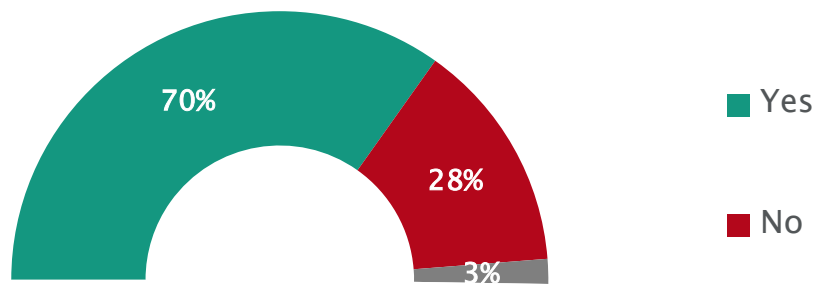
THE MAJORITY OF DISABLED PEOPLE EXPECT TO FLY ABOUT THE SAME AMOUNT IN THE COMING YEAR. SEVEN IN TEN OF THOSE WHO FIND FLYING HARD REQUIRE ASSISTANCE

Expected flying behaviour (frequency) in next 12 months, as compared to previous year
 % of those who have a disability who expect to fly more, the same amount or less in the next year



% who need assistance when making a flight

% of those who have a disability and find accessing/using airports difficult or find flying difficult



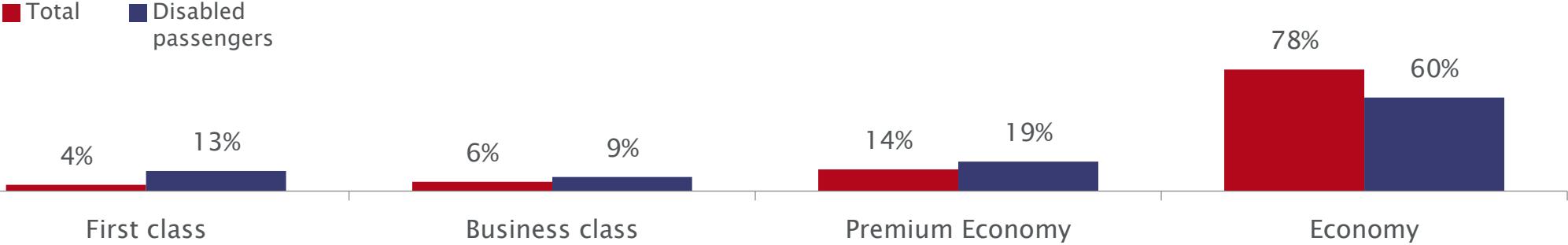
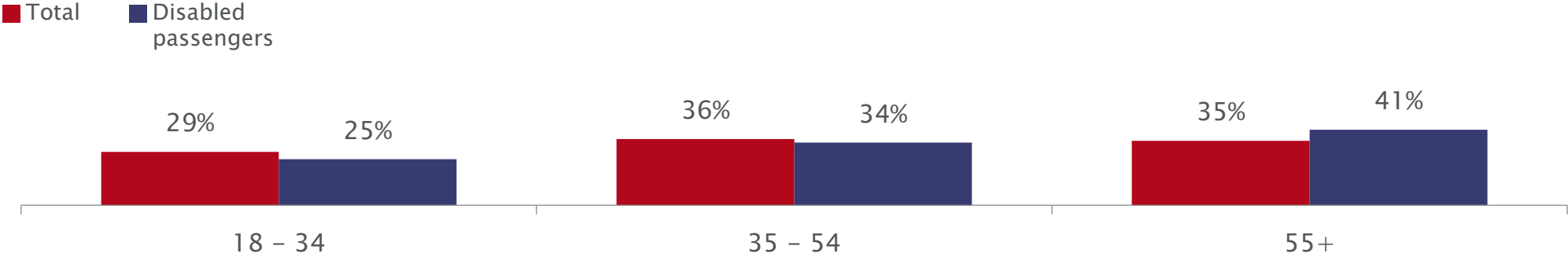
The majority of disabled passengers are likely to fly the same amount, or more in the next year. Three in five people with a disability say they expect to fly about the same amount in the coming year (60%), compared to the previous 12 months. Close to one in five say they expect to fly more (19%), and 12% expect they will fly less - with one in ten reporting that they do not know (10%).

Of those who find flying difficult, seven in ten (70%) say they think they would require specific assistance from their airport or airline if flying, while over a quarter say they wouldn't (28%).

Q11. In the next 12 months, do you expect that you will fly ...? / Q12. Does your disability or health condition mean that you would need or think you would need specific assistance from the airport or airline? Base: all who have a disability (n=734) / Base: All those who have a disability and find accessing/using airports difficult and/or find flying difficult (n=419)

PASSENGERS WITH DISABILITIES ARE MORE LIKELY TO TRAVEL FIRST, BUSINESS OR PREMIUM ECONOMY THAN THE AVERAGE PASSENGER

Disabled passenger as compared to non disabled passenger: across ages and cabin class flow



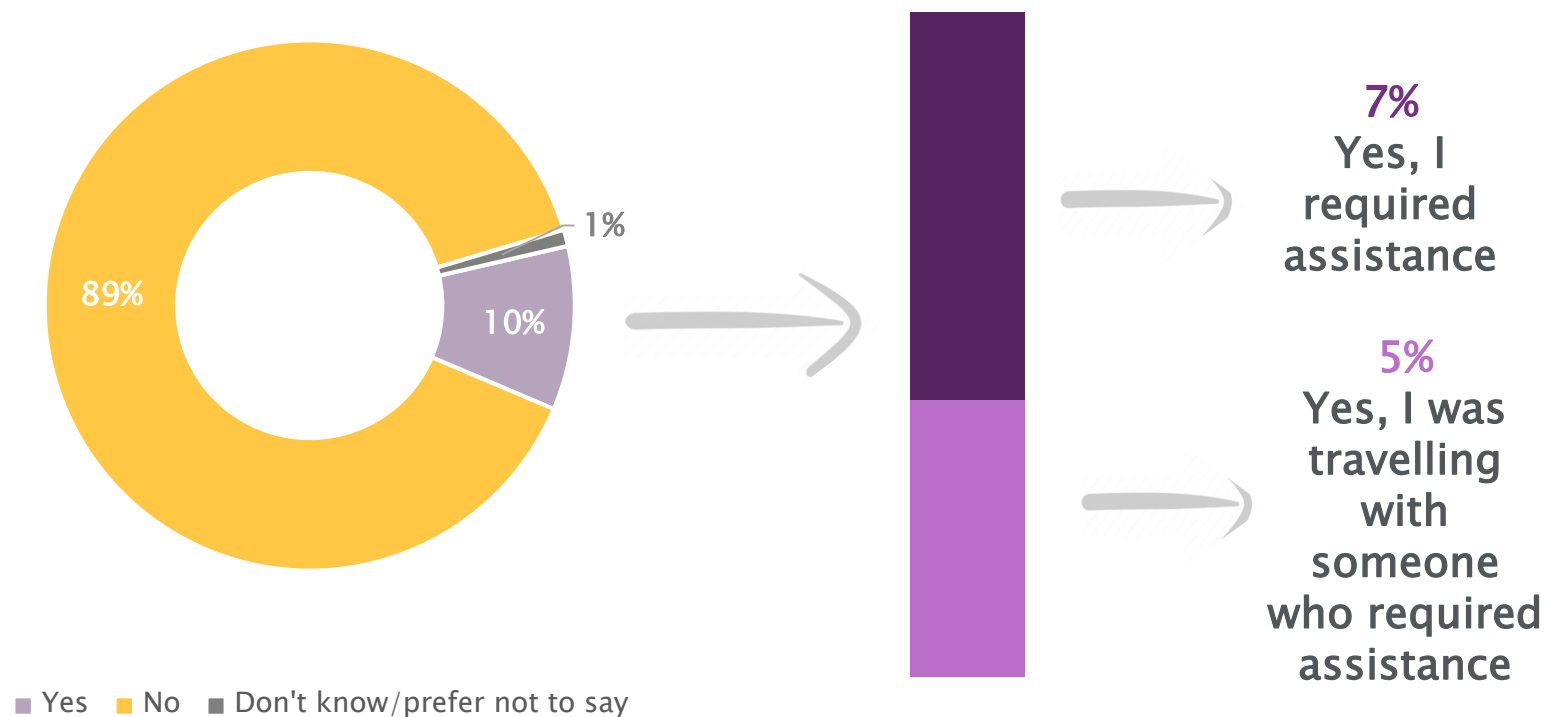
Passengers with reduced mobility are less likely to fly economy than the average passenger (60% vs. 78% of all passengers), and slightly more likely to travel first class (13% vs. 4%), business class (9% vs. 6%) and premium economy (19% vs. 14%).

D2. Age Base: All respondents (n=3500) Respondents with a disability (n=734) Q20. Which cabin class did you travel in the last time you flew? Base: All who have flown in the last 12 months (n=1967) All who have flown in the last 12 months and have a disability (n=281)

ONE IN TEN REQUIRED ASSISTANCE FOR THEMSELVES/OTHERS ON THEIR LAST FLIGHT

Those who required assistance from the airport or airline

% saying they required assistance



While 89% say they did not require assistance when travelling on their last trip, 10% required assistance either for themselves or for a travelling companion. Of all those surveyed, 5% say someone they were with required assistance, while 7% say it they themselves required assistance. This 10% rises to:

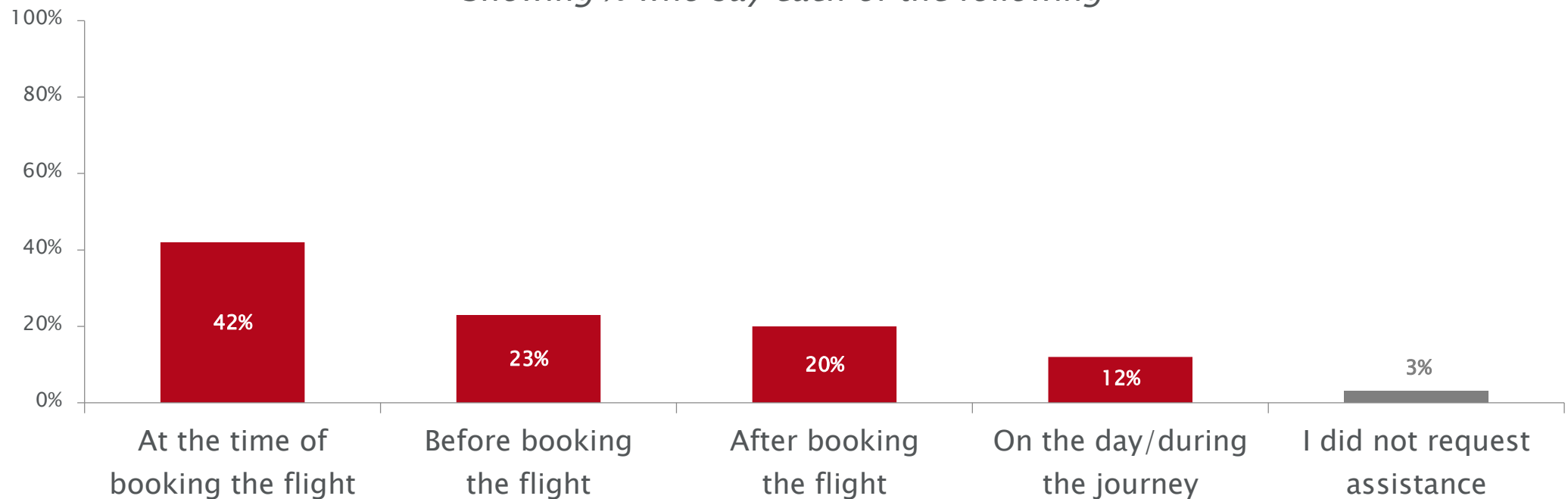
- 14% of 18–34 yr. olds.
- 15% of those in East Midlands.
- 21% dissatisfied with their flight.

Q22. Did you or anyone in your party have a disability or health condition that meant you required some assistance from the airport or airline on this occasion? Base: all who have flown in the last 12 months (n=1967)

RECENT FLYERS WHO REQUIRED ASSISTANCE FOR THEIR LAST FLIGHT ARE MOST LIKELY TO HAVE REQUESTED THIS AT THE TIME OF BOOKING THE FLIGHT

10% of those who have flown in the last 12 months say they required assistance for either themselves or someone they were travelling with during their most recent flight.

Point during booking process that assistance was requested *Showing % who say each of the following*



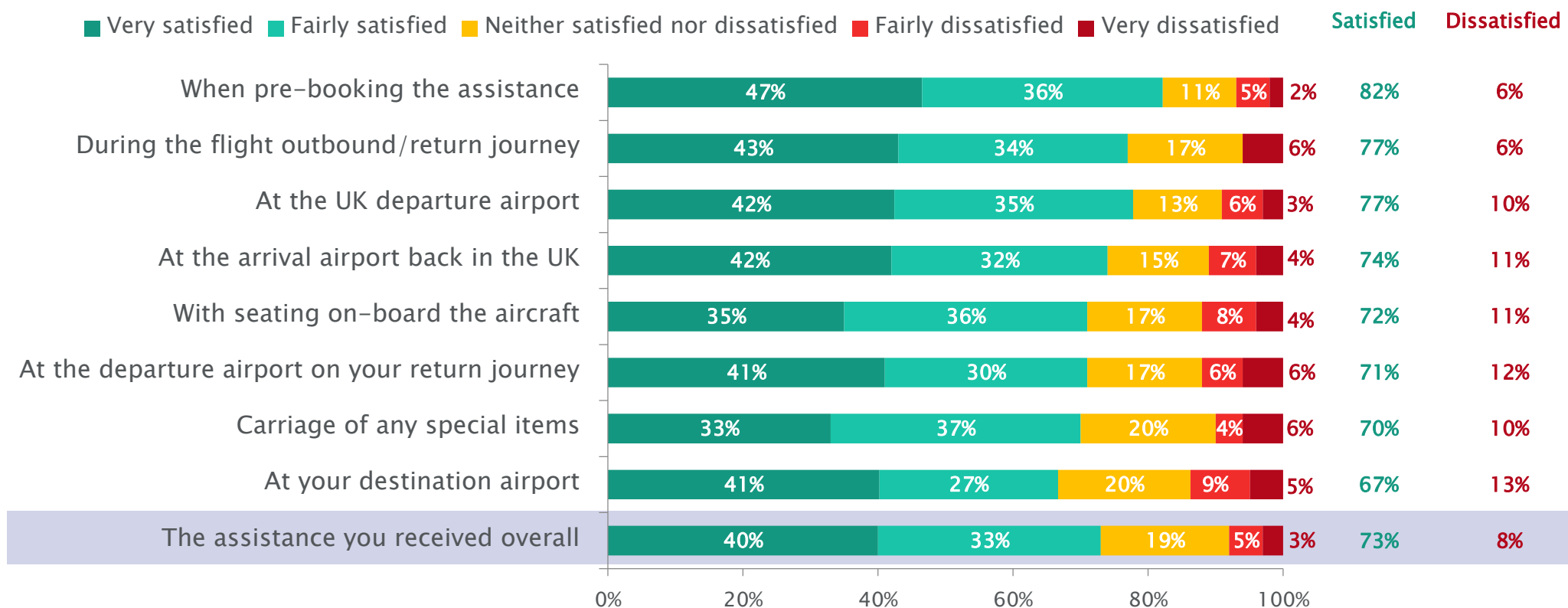
Recent flyers who required assistance when flying tend to have requested assistance in advance of their last journey, as opposed to on the day or during the journey (12%). They are most likely to have requested assistance at the time of booking the flight (42%). Further to this, a quarter say that they requested the assistance before booking the flight (23%), while one in five did so after booking the flight (20%). Only a small minority of those who say they require assistance when flying did not request assistance for their last flight (3%).

Q22. Did you or anyone in your party have a disability or health condition that meant you required some assistance from the airport or airline on this occasion? Base: all who have flown in the last 12 months (n=1967) Q30. At what point during the booking process did you request assistance for your journey? Base: all who have flown in the last 12 months and require assistance (n=206)

OVERALL, A MAJORITY OF RECENT FLYERS WHO REQUESTED ASSISTANCE ARE SATISFIED WITH EACH ASPECT OF THE SERVICE THEY RECEIVED

Satisfaction with assistance at each point in the journey

Showing % who said they were satisfied or dissatisfied with each of the following aspects

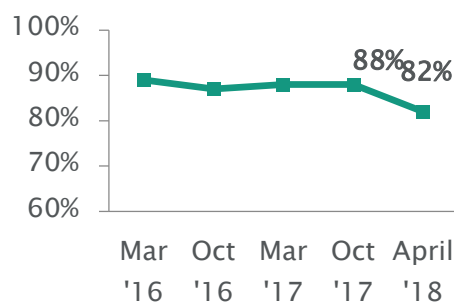


Overall, a majority of recent flyers who requested assistance say they were satisfied with the service they received at each point in their recent journey. They are most likely to say they were satisfied with the experience of pre-booking the assistance (82%). Respondents are also more likely to say they were satisfied with the experience at the UK departure airport (77%) and arrival airport back in the UK (74%) than the service they received at their destination airport (67%).

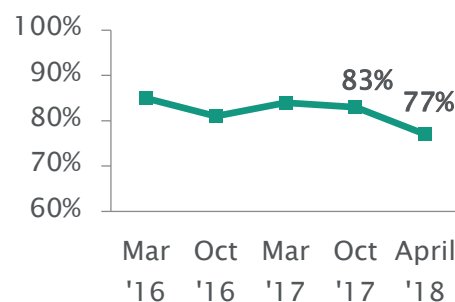
SATISFACTION WITH THE ASSISTANCE RECEIVED AT THE DESTINATION AIRPORT AND DEPARTURE AIRPORT ON THE RETURN JOURNEY HAS DECREASED COMPARED TO AUTUMN 2017

Satisfaction with assistance at each point in the journey
Showing % who said they were satisfied with each of the following aspects

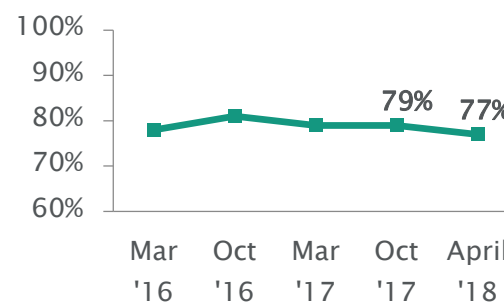
When pre-booking assistance



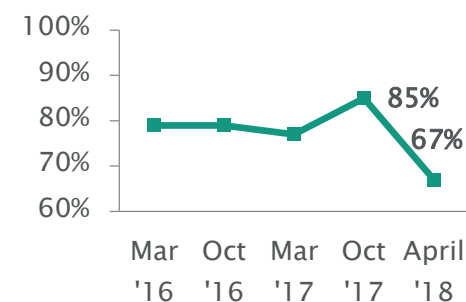
At UK departure airport



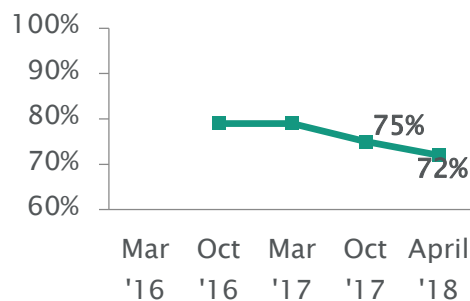
During flight



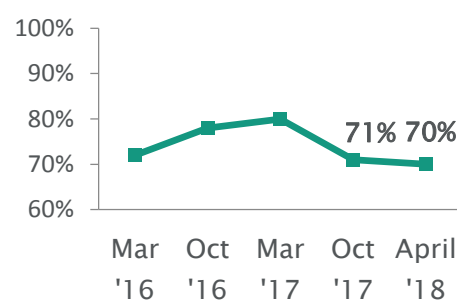
At destination airport



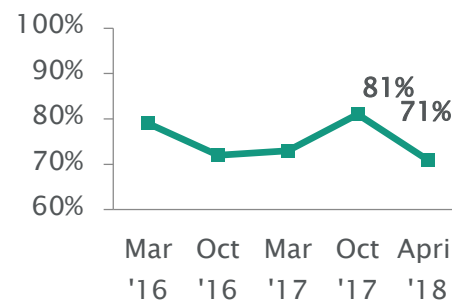
Seating on-board



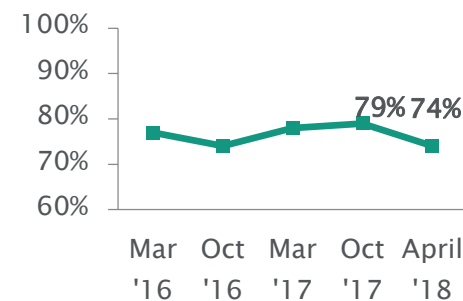
Carriage of any special items



Departure airport on the return journey



At arrival airport back in UK



Levels of satisfaction have remained broadly in line with those recorded in Autumn 2017 regarding the in-flight experience (77% Spring 2018 vs. 79% Autumn 2017) and the carriage of special items (70% vs. 71% respectively). However, satisfaction has declined in other areas, most notably in the experience at the destination airport (67% vs. 85% respectively) and with the departure airport on the return journey (71% vs. 81% respectively). This is largely driven by an increase in the proportion of respondents who say they are neither satisfied nor dissatisfied with these aspects.

Satisfied

Q31. How satisfied or dissatisfied were you with the service you received at each of these points in the journey?

Base: All those who have flown in the last 12 months and requested assistance (excluding DK and NA responses) n=164-199

DISSATISFACTION WITH THE ASSISTANCE RECEIVED TENDS TO HAVE ARISEN FROM POOR ORGANISATION AND A PERCIEVED LACK OF RESPECT FROM STAFF

Reasons for being dissatisfied with the assistance received

“Staff who were employed to help disabled passengers sat around on seats designated for passengers and actually had to be asked to vacate them so that we could sit down. They were extremely rude and were more interested in their social intercourse with colleagues than the needs of passengers.”

“Parking – pushing the hundreds of metres to the airport, having to park and retrieve my wheelchair on gravel as there were no parking spaces near the departures. The bus driver was reluctant to lower the ramp to get me on the bus. I had horrible and disgusting treatment which will prevent me flying ever again. On board, there was no access to a toilet – would you like this treatment?”

Slow service

Assistance for services

Unaware of needs

Poor assistance

Bad experience

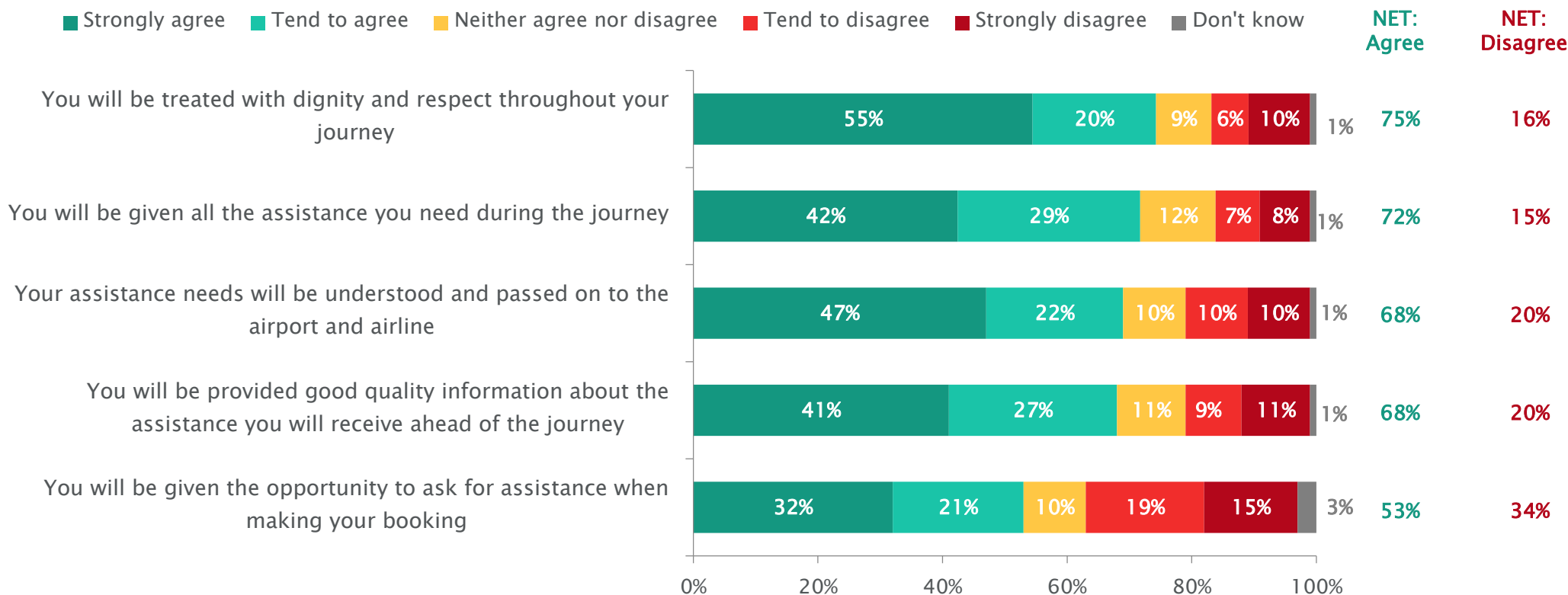
Communication

Q32. Why were you dissatisfied with the assistance you received overall?

Base: All who have flown in the last 12 months and were dissatisfied with the assistance they received overall (n=16)

THOSE WITH DISABILITIES EXPECT AIRLINES TO PROVIDE A HIGH STANDARD OF SERVICE THROUGHOUT THEIR JOURNEY

Expectations among those with disabilities for service when flying



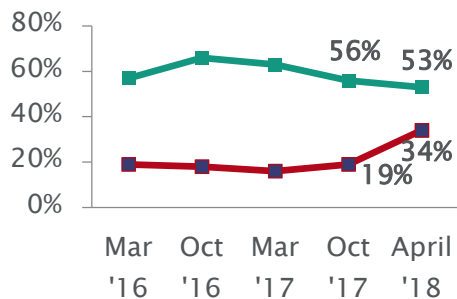
Disabled passengers who have flown in the last three years are more likely to agree than disagree with each of the statements tested. Among these, three quarters agree that they will be treated with dignity and respect throughout their journey (75%), with more than half agreeing with this strongly (55%). Seven in ten agree that they will be given all the assistance they need during the journey (72%), that their assistance needs will be understood and passed on to the airport and airline (68%), and that they will be provided with good quality information about the assistance they will receive ahead of the journey (68%). In comparison, only half agree that they will be given the opportunity to ask for assistance when making their booking (53%), while a third disagree with this (34%).

Q54. To what extent 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: All those who have a disability and have flown in the last 3 years (n=401)

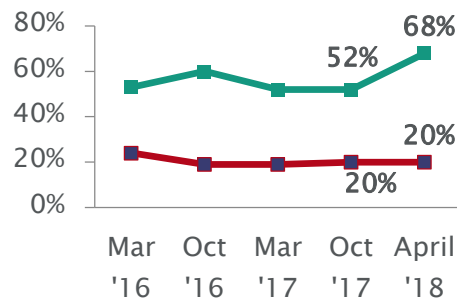
THOSE WITH DISABILITIES ARE MORE LIKELY TO AGREE WITH MOST OF THE STATEMENTS TESTED COMPARED TO AUTUMN 2017

Expectations for future travel amongst disabled respondents

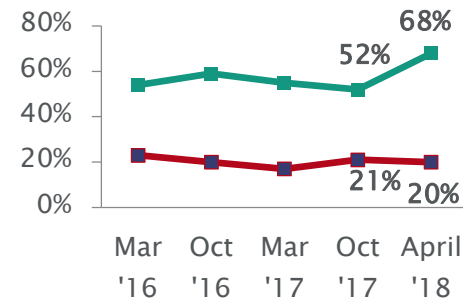
Opportunity to ask for assistance



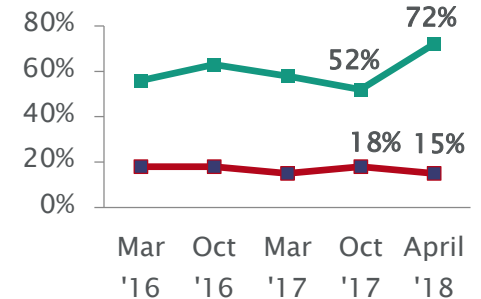
Information about assistance



Needs understood and passed on to airport

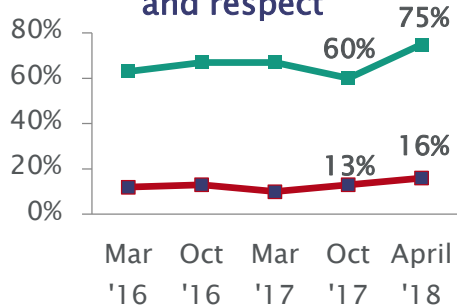


Assistance given during journey



Agree — Disagree —

Treated with dignity and respect



	Opportunity to ask for assistance	Information about assistance	Needs understood /passed on	Assistance during journey	Treated with dignity and respect
Net: Agree among those aged 55+	78%	87%	89%	90%	94%
Net: Agree among those aged 18-24	29%	46%	50%	51%	56%

Q54. To what extent 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: All those who have a disability and have flown in the last 3 years (n=401)

SECTION 5: KEY DRIVER ANALYSIS

*Analysis of key drivers of passenger
satisfaction using survey data*



KEY DRIVER ANALYSIS SHOWS ONBOARD AND IN-FLIGHT EXPERIENCE DRIVES SATISFACTION

Key drivers of satisfaction with the overall flying experience: importance and current levels of satisfaction

Model explains 90%+ of all variance.

Key Driver	Importance	Satisfaction
Q27. Level of satisfaction – Onboard and in-flight experience	14%	77%
Q28. Level of satisfaction – Baggage collection at the airport in the UK	13%	79%
Q27. Level of satisfaction – Airport experience in the UK	10%	78%
Q27. Level of satisfaction – Value for money	9%	76%
Q28. Level of satisfaction – Finding your way to the gate	9%	87%
Q28. Level of satisfaction – Security at the airport in the UK	8%	81%
Q28. Level of satisfaction – Information about flight status at the airport in the UK	8%	85%
Q27. Level of satisfaction – Handling of any complaints you made to the airport or airline	6%	64%
Q28. Level of satisfaction – Ease of finding the information to compare the choices of airport and airline	5%	79%
Q28. Level of satisfaction – Transfer /connection to another flight	5%	77%
Q28. Level of satisfaction – Check-in and bag drop at the airport in the UK	3%	81%

Onboard and in-flight experience have the strongest impact on levels of satisfaction of all factors tested, at 13.8%. Passenger satisfaction with this element of the experience, however, is lowest of all the elements tested. If the onboard and in-flight experience were to be improved, levels of satisfaction with the overall flying experience would likely improve by a significant amount.

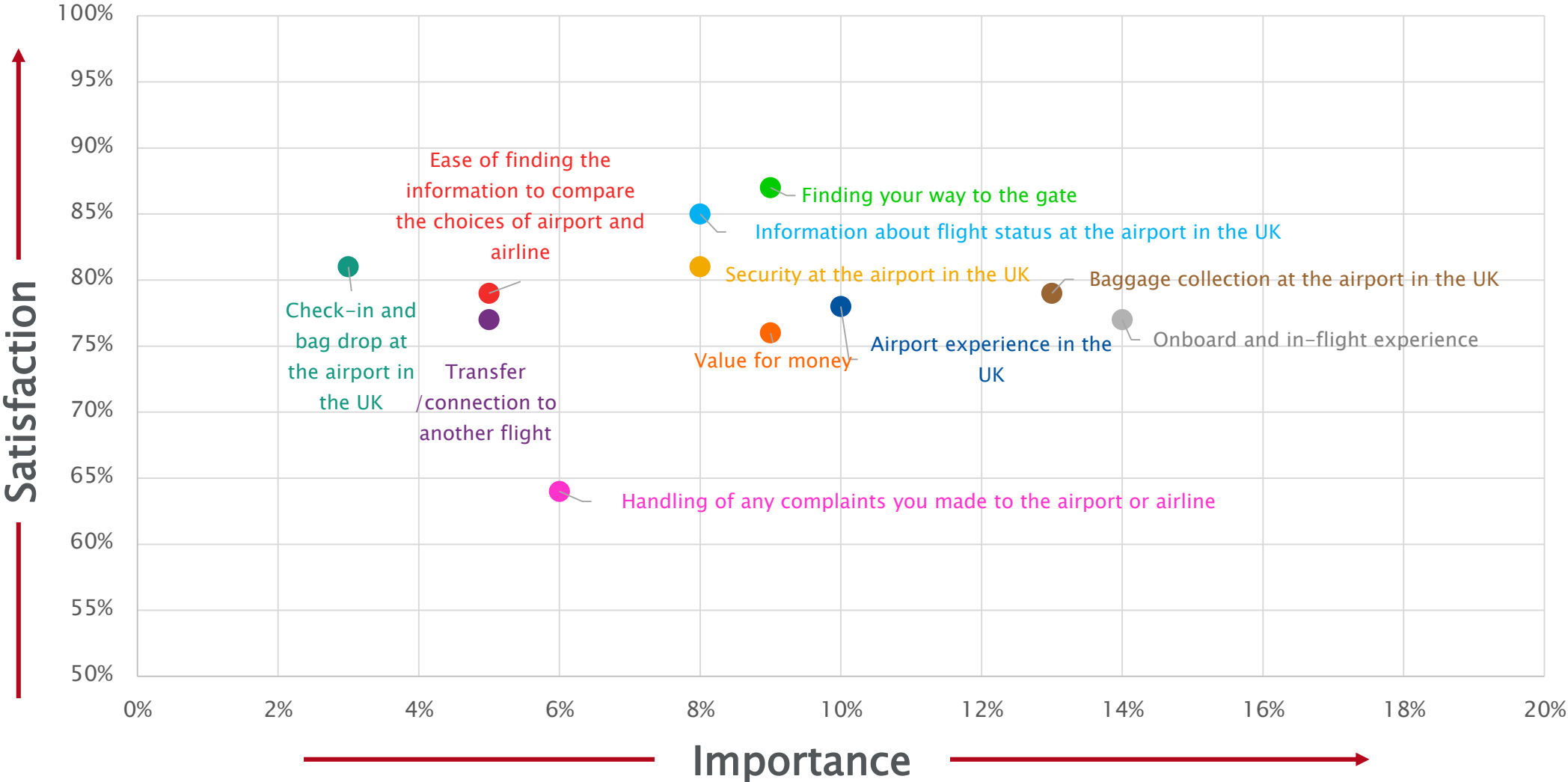
A secondary driver of satisfaction with the overall flying experience is the process of booking the flight (8.9%). This driver sees comparatively high levels of satisfaction – 89%. This positive correlation demonstrates that an area of relative importance to passengers is one currently seeing higher levels of satisfaction.

Q27. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight

Base: all who have flown in the last 12 months, excluding DK and NA responses (n=1967) Q28. 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 (n=1967)

ALL PASSENGERS: KEY DRIVER ANALYSIS

Key drivers of satisfaction with the overall flying experience: importance and current levels of satisfaction



Q27. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight
 Base: all who have flown in the last 12 months, excluding DK and NA responses (n=1967) Q28. 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 (n=1967)

KEY DRIVER ANALYSIS FOR DISABLED PASSENGERS SHOWS ONBOARD AND IN-FLIGHT EXPERIENCE DRIVES SATISFACTION

Disabled passengers: Key drivers of satisfaction with the overall flying experience: importance and current levels of satisfaction

Model explains 90%+ of all variance.

Key Driver	Importance	Satisfaction
Q27. Level of satisfaction – Onboard and in-flight experience	13.8%	77%
Q27. Level of satisfaction – The process of booking the flight	8.9%	87%
Q27. Level of satisfaction – Deciding which flight to book	7.3%	86%
Q28. Level of satisfaction – Baggage collection at the airport in the UK	7.2%	79%
Q28. Level of satisfaction – Finding your way to the gate	6.8%	87%
Q28. Level of satisfaction – Passport control/immigration in the UK	6.7%	79%
Q28. Level of satisfaction – Information about flight status at the airport in the UK (e.g. departure time, delays, cancellation)	6.7%	85%

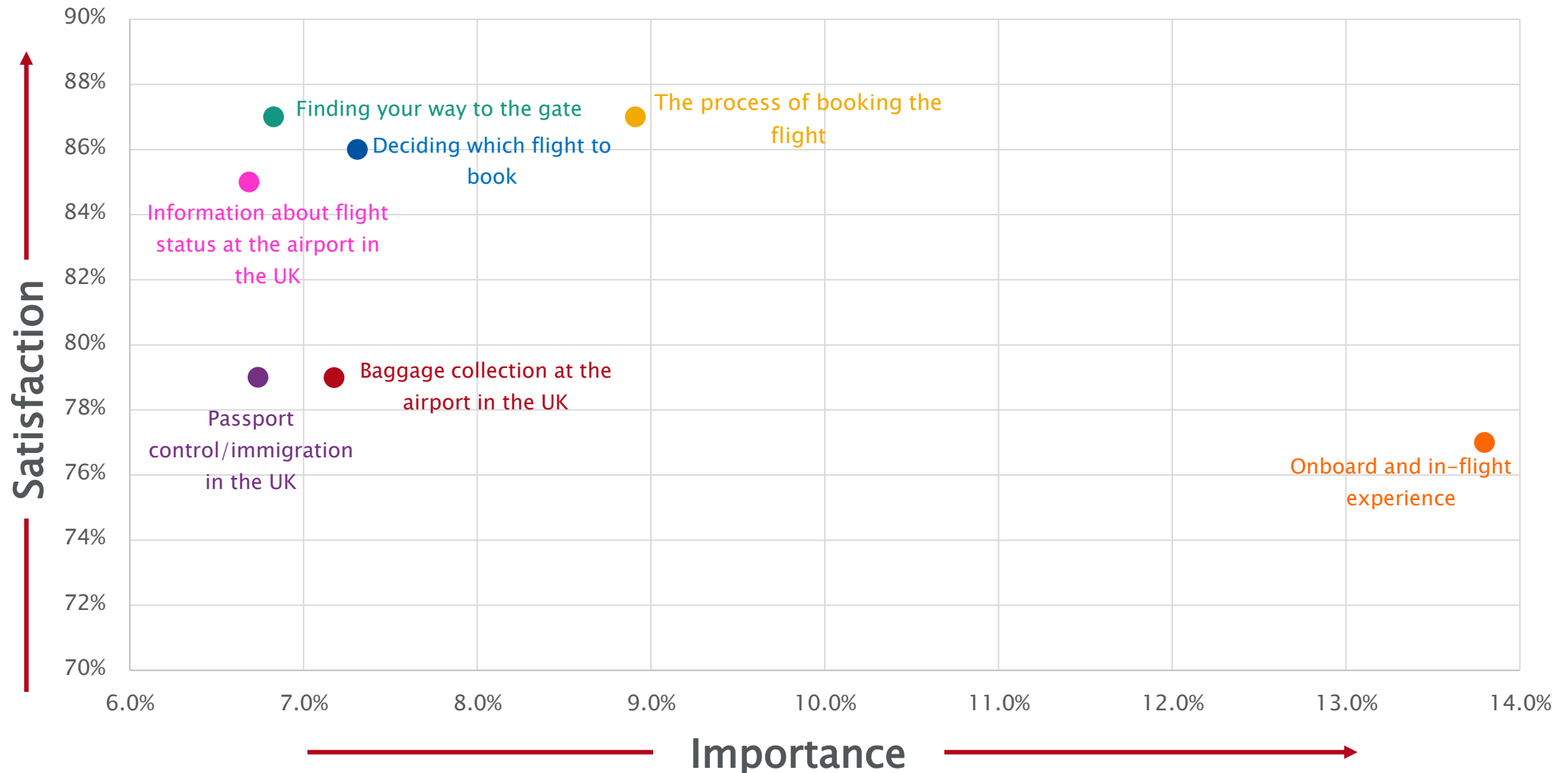
Onboard and in-flight experience have the strongest impact on levels of satisfaction of all factors tested, at 13.8%. Disabled passengers' satisfaction with this element of the experience, however, is lowest of all the elements tested. If the onboard and in-flight experience were to be improved, levels of satisfaction with the overall flying experience would likely improve by a significant amount.

A secondary driver of satisfaction with the overall flying experience is the process of booking the flight (8.9%). This driver sees comparatively high levels of satisfaction – 89%. This positive correlation demonstrates that an area of relative importance to passengers is one currently seeing higher levels of satisfaction.

Q27. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight. Base: all who have flown in the last 12 months, excluding DK and NA responses (n=1967) Q28. 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 (n=1967)

DISABLED PASSENGERS: KEY DRIVER ANALYSIS

Disabled passengers: Key drivers of satisfaction with the overall flying experience: importance and current levels of satisfaction



Q27. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight

Base: all who have flown in the last 12 months, excluding DK and NA responses (n=1967) Q28. 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 (n=1967)

SECTION 6: PUBLIC EXPECTATIONS FOR PROTECTION

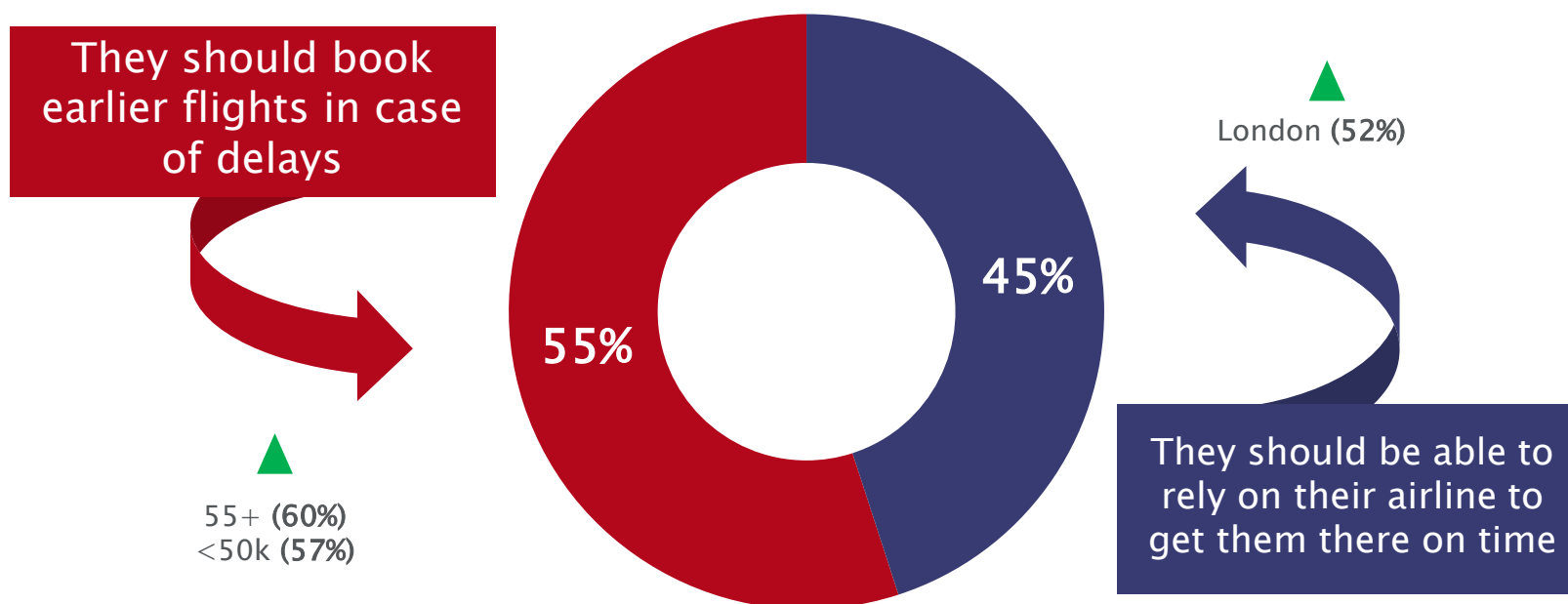
New questions for Spring 2018



MOST UK ADULTS THINK THAT IT IS THEIR RESPONSIBILITY TO ACCOUNT FOR POSSIBLE FLIGHT DELAYS WHEN PLANNING THEIR TRIPS

Perceived responsibility for accounting for the punctuality of flights and the risk of delays

If someone needs to arrive by a certain time...

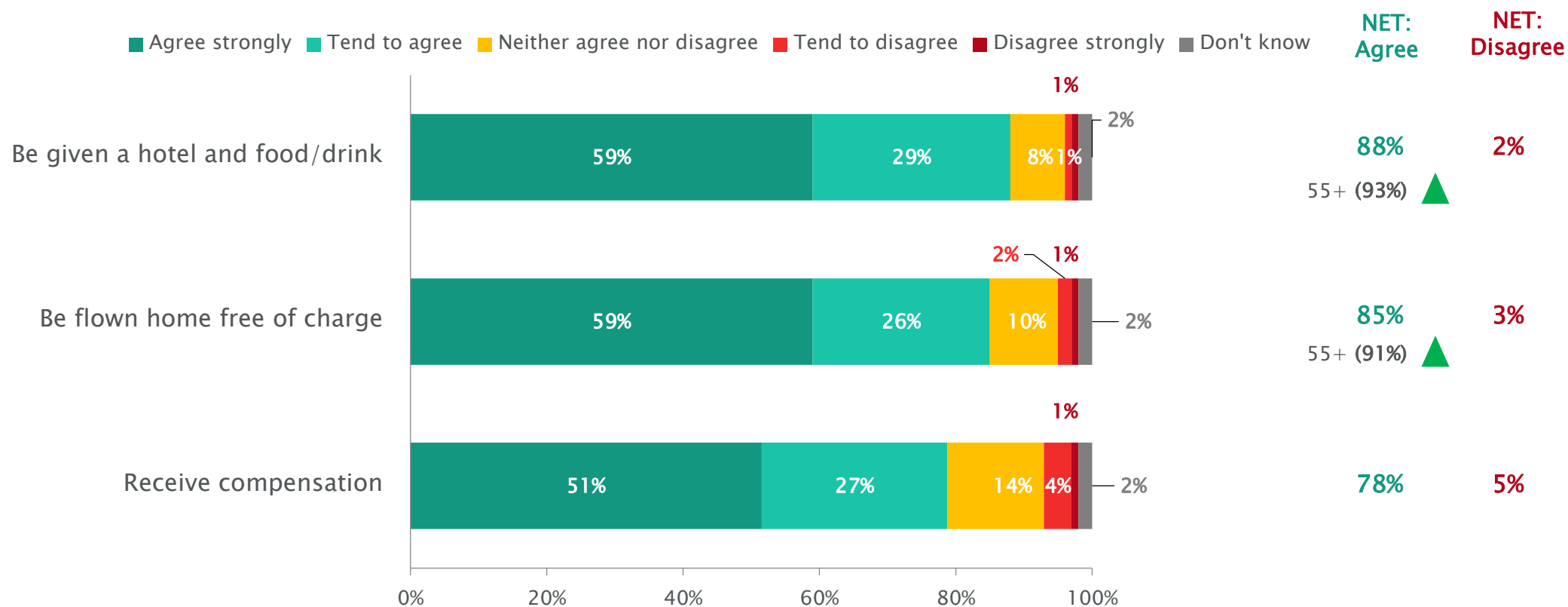


UK adults are divided over who should take responsibility for accounting for the punctuality of flights and the risk of delays. While they are most likely to say that if someone needs to arrive by a certain time they should book earlier flights in case of delays (55%), a significant minority say that, conversely, they should be able to rely on their airline to get them there on time (45%).

A CLEAR MAJORITY OF UK ADULTS SAY EACH FORM OF REDRESS TESTED SHOULD BE PROVIDED TO PASSENGERS STRANDED ABROAD DUE TO AN AIRLINE GOING OUT OF BUSINESS

Redress for passengers stranded abroad if an airline goes out of business

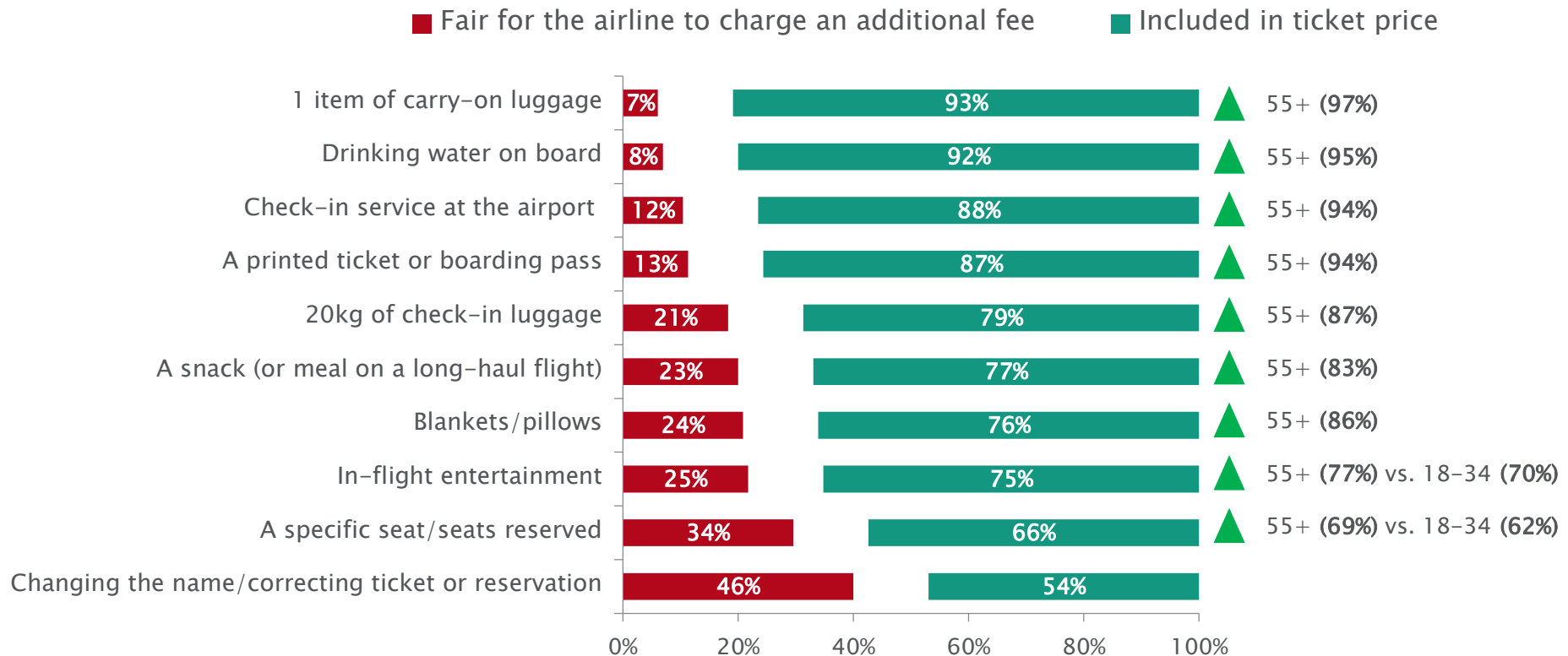
Showing % who said they agree or disagree with each of the following



A clear majority of UK adults say that if an airline or travel company goes out of business, passengers who are stranded abroad should receive each of the types of redress tested. In line with the preference for immediate redress in the case of delays, older adults are more likely to say that passengers should be given a hotel and food / drink (88%) and flown home free of charge (85%) than to say that they should receive compensation (78%), although only a small minority disagree with the latter (5%).

UK ADULTS ARE MORE LIKELY TO SAY THAT THE FOLLOWING SERVICES SHOULD BE INCLUDED IN THE TICKET PRICE THAN CHARGED AT AN ADDITIONAL FEE BY THE AIRLINE

Consumer perceptions of how different elements should be charged *Showing % who said the following*



UK adults are more likely to say that each of the above elements should be included as part of the ticket price for a long-haul flight than to say that it is fair for the airline to charge an additional fee for it. This consensus is particularly strong with regards to a printed ticket or boarding pass (87%), check-in service at the airport (88%), drinking water on board (92%), and an item of carry-on luggage (93%). In comparison, UK adults are much less likely to say that a specific seat reservation (66%) or being able to change or correct the ticket (54%) should be included, although this is still a majority.

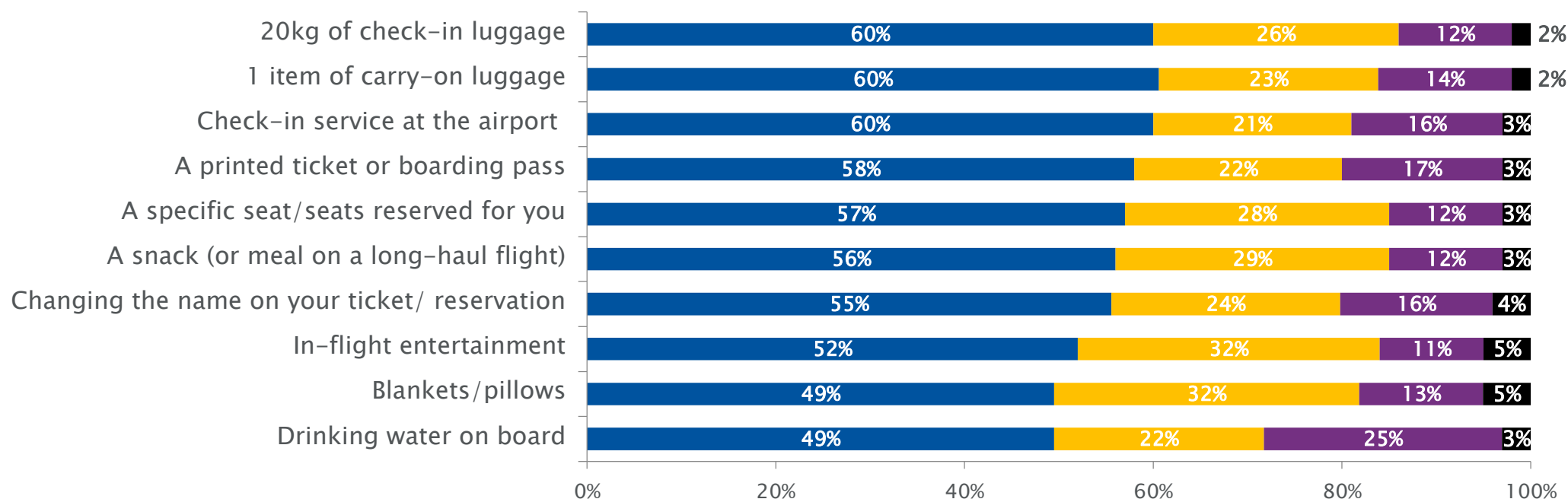
Q43. Below is a list of services that an airline might provide on a long-haul flight, either as part of the original ticket price, or for an additional fee. Please sort them into things you think should be included as part of the ticket for a long-haul flight, and things for which it is fair for the airline to charge an additional fee. Base: All respondents (ONLINE ONLY) (n=3000)

IF ANY OF THESE ITEMS WERE NOT INCLUDED IN THE TICKET PRICE, MOST CONSUMERS WOULD FEEL THEY SHOULD BE INFORMED IN ADVANCE BY THE AIRLINE

Expectations for being informed about optional paid-for extras

Showing % who said the following

- I should be warned in advance by the airline
- I would expect the Government to stop airlines charging for the services they should not
- Information on which services are free and which are not should be available, but it is my responsibility to do my research
- None of the above



Overall, most respondents feel that they should be warned in advance by the airline if each of the services they thought should be included in the ticket price were charged as optional paid-for extras. Although still a minority, respondents are more likely to see it as their responsibility to do their research into whether blankets and / or pillows (32%) or in-flight entertainment (32%) are included in the ticket price compared to the other services tested. Conversely, they are most likely to say they would expect the government to stop airlines charging for drinking water on board (25%).

Q44. Imagine the services you said should be included in your ticket price were available to you, but only as optional paid-for extras. Which of the following, if any, do you think should happen in this situation? Base: All those who say that each respective service should be included in the ticket price (ONLINE ONLY) (n=1633-2784)

YOUNGER PASSENGERS ARE MORE LIKELY TO EXPECT ONE ITEM OF CARRY-ON LUGGAGE TO COST AN ADDITIONAL AMOUNT

Expectations regarding being informed about optional paid-for extras

% Who say that the Government should stop airlines charging for services they should not

Drinking water on board	25%		
A printed ticket or boarding pass	17%	▲ Wales 22%	
Check-in service at the airport	16%	▲ North East 20%	
Changing the name on your ticket/ reservation	16%	▲ Northern Ireland 22%	
1 item of carry-on luggage	14%	▲ (18-34) 17%	
Blankets/pillows	13%		
20kg of check-in luggage	12%		
A snack (or meal on a long-haul flight)	12%		
A specific seat/seats reserved for you/your party	12%	▲ (55+) 14%	▲ Northern Ireland 20%
In-flight entertainment	11%		

Q44. Imagine the services you said should be included in your ticket price were available to you, but only as optional paid-for extras. Which of the following, if any, do you think should happen in this situation? Base: All those who say that each respective service should be included in the ticket price (ONLINE ONLY) (n=1633-2784)

SECTION 7: COMPENSATION FOR DELAYS

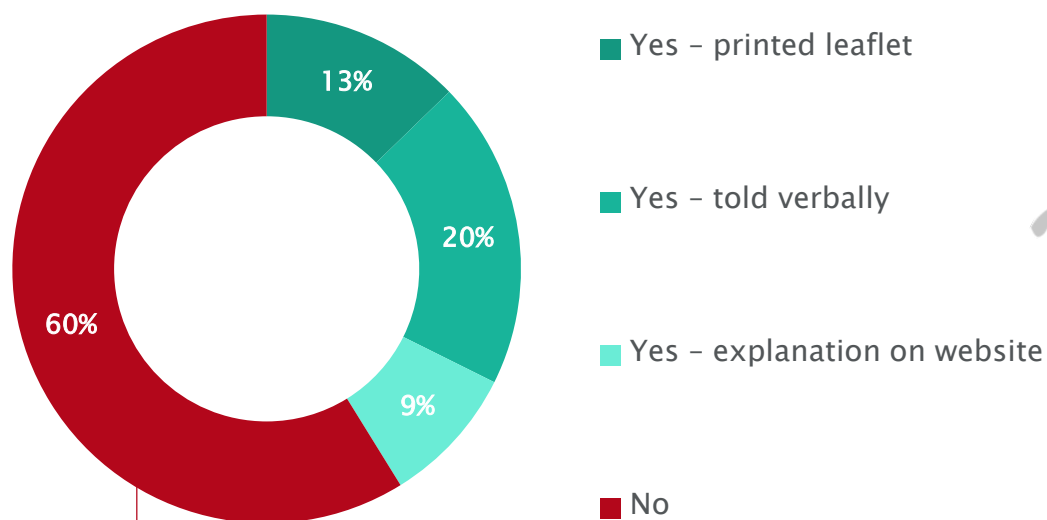
New questions for Spring 2018



THREE IN FIVE RECENT FLYERS WHOSE LAST FLIGHT WAS DELAYED OR CANCELLED WERE NOT MADE AWARE OF RIGHTS TO COMPENSATION

Of those who experienced a flight delay or cancellation on their most recent flight in the last 12 months (n=275)...

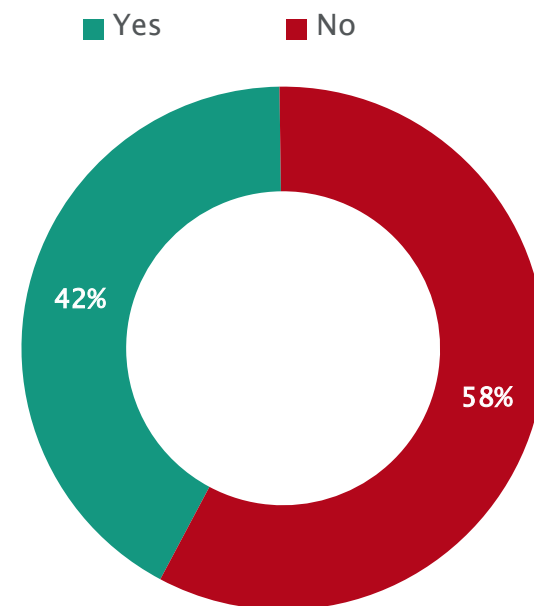
Made aware of compensation by airline (n=275)*



▲ 55+ (73%) vs. 18-34 (47%)

▼ Disabled passenger (44%)
Travelled with children (42%)

Claimed compensation (n=108)



Three in five adults who have flown in the last twelve months and whose most recent flight was delayed or cancelled say they were not made aware of their rights to compensation (60%). Those who were made aware of this are more likely to not have made a claim than to have done so (58% vs. 42% respectively).

**It should be noted that not all those who experienced a delay or cancellation will necessarily have been entitled to compensation.*

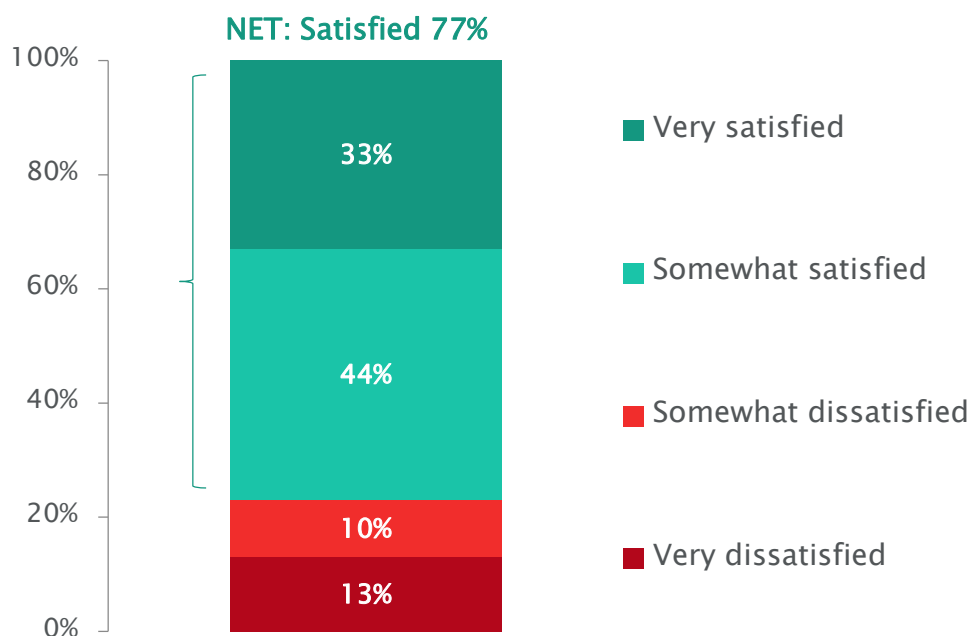
Q46. Did your airline make you aware of your right to compensation? Base: All those who have flown in the last 12 months and whose most recent flight was delayed or cancelled (n=275) Q47. Did you claim compensation for this delay? Base: All those who have flown in the last 12 months whose most recent flight was delayed or cancelled and were made aware of their right to compensation (n=108)

THREE QUARTERS OF THOSE WHO CLAIMED COMPENSATION WERE SATISFIED WITH THE PROCESS

Of those who experienced a flight delay or cancellation on their most recent flight in the last 12 months (n=275)...

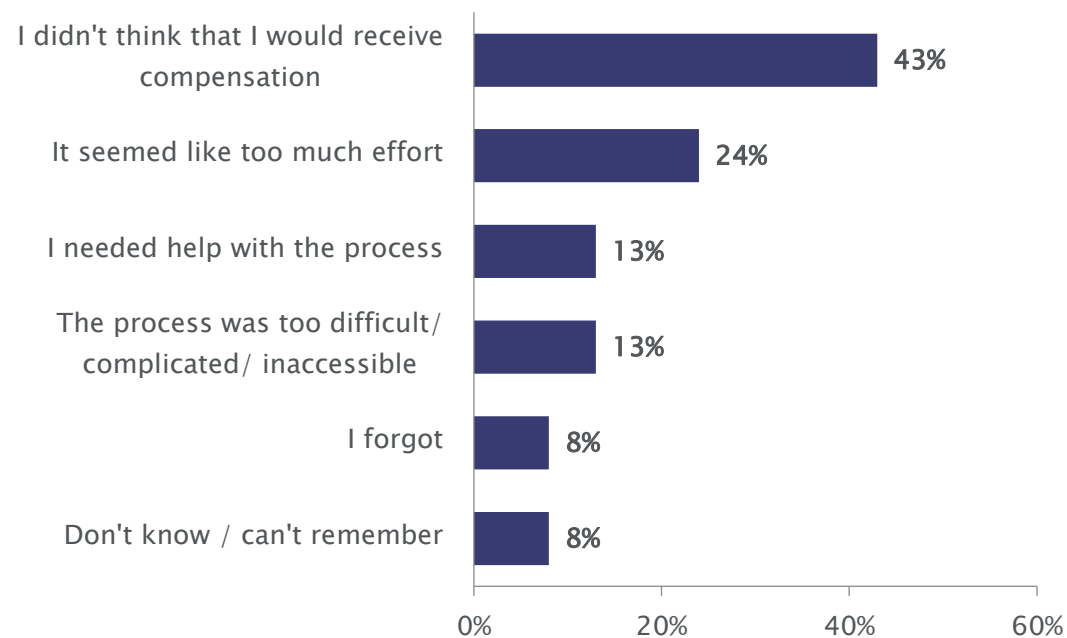
Satisfaction with process of claiming compensation

All those who claimed compensation (n=63)



Reasons for not claiming compensation

All those who did not claim compensation (n=45)*



The most common reason for not making a claim was because the passenger didn't think they would receive compensation (43%). Of those who did make a claim, close to four out of five were satisfied with the process (77%), although a quarter were dissatisfied (23%)

Q46. Did your airline make you aware of your right to compensation? Base: All those who have flown in the last 12 months and whose most recent flight was delayed or cancelled (n=275) Q47. Did you claim compensation for this delay? Base: All those who have flown in the last 12 months whose most recent flight was delayed or cancelled and were made aware of their right to compensation (n=108) / Q48. How satisfied or dissatisfied were you with the process of claiming compensation? Base: All those who claimed compensation (n=45)* / Q49. For which of the following reasons, if any, did you not claim compensation for this delay/cancellation? Base: All those who did not claim compensation (n=63)

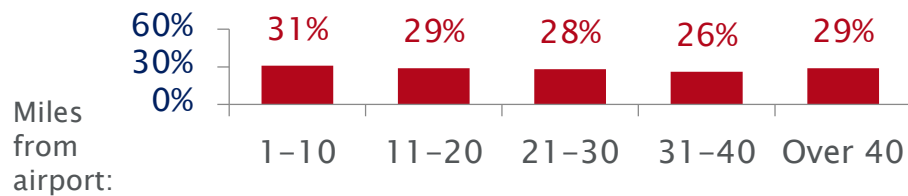
SUB-GROUP ANALYSIS



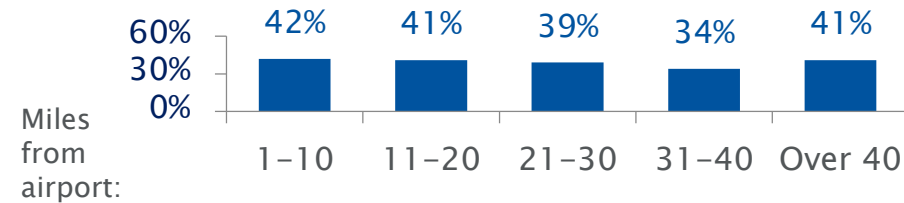
DISTANCE FROM NEAREST UK AIRPORT IS UNLIKELY TO DRIVE SATISFACTION OR DISSATISFACTION

Distance (miles) from nearest UK airport and attitudes towards flying experience

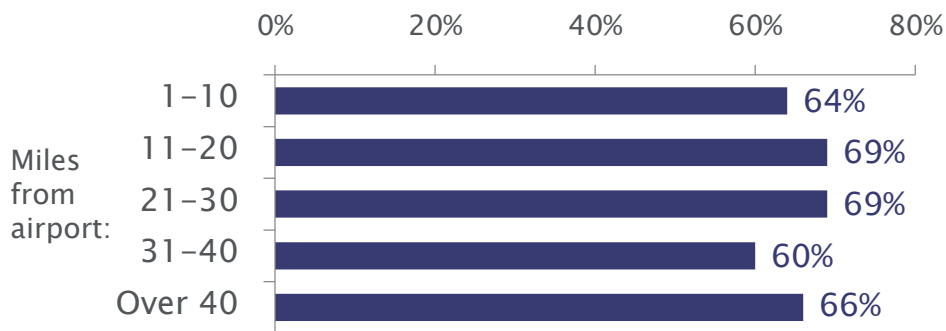
Flying is getting better (n=1965)



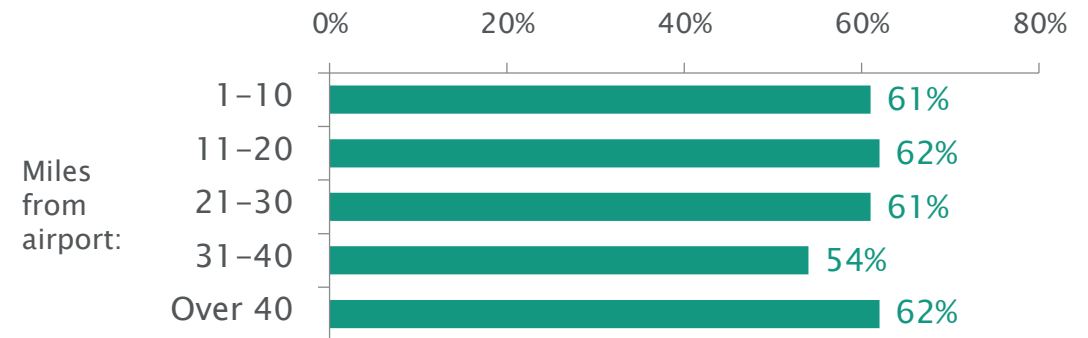
Experience is getting better: Agree (n= 2895)



Satisfaction with choice between UK airports (n=1965)



I enjoy travelling by air: Agree (n=2895)



Satisfaction with the flying experience in general is unlikely to be driven by the distance people live from their nearest airport. Across a number of metrics for positivity towards air travel and perceptions of choice, there is no consistent pattern based on distance passengers live from their nearest UK airport.

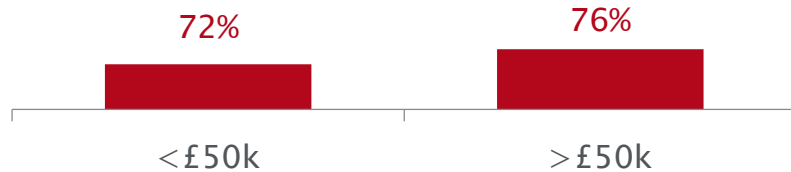
Q5. Thinking about your experiences of flying over the last five years, would you say that flying is... Base: All who have flown from a UK airport in the last 10 years (n=2895) Q13. Below are various statements about travelling by air. Please tell us to what extent you agree or disagree with each of the statements. "The experience of travelling by air is getting better", "I enjoy travelling by air" Base: All respondents excluding DK and NA responses (n=1965) Q28. 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, excluding DK and NA responses (n=1965)

THOSE WITH A HIGHER INCOME ARE MORE LIKELY TO THINK THEY SHOULD BE INFORMED OF THEIR RIGHTS IN THE EVENT OF A FLIGHT DELAY

Satisfaction with choice and information by income

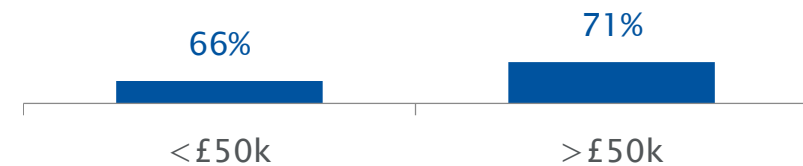
Ease finding info to compare choices

(n=1967)

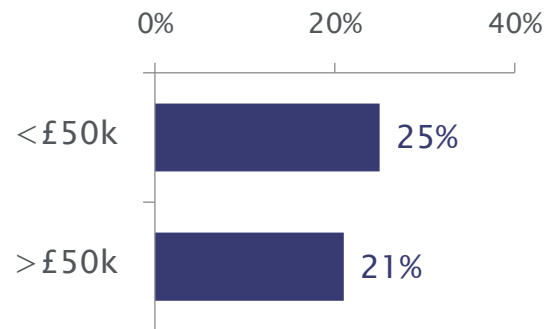


Amount of choice between airports

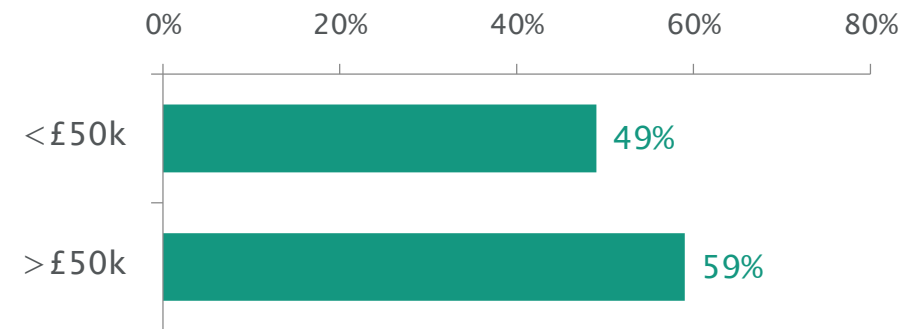
(n=1967)



1 item of carry on luggage should be included but my responsibility to research (n=2784)



Information about rights when delayed (n=3500)



Those earning more than 50k (as a household) annually are more likely to think that information on their rights should be provided to them in the event they are delayed by 3h+ on a short haul flight from the UK (59% as compared to 49% of those earning less than 50k annually). This group is also more likely to believe one item of carry on luggage should be included within their ticket price, but that it is the passenger's responsibility to research this beforehand.

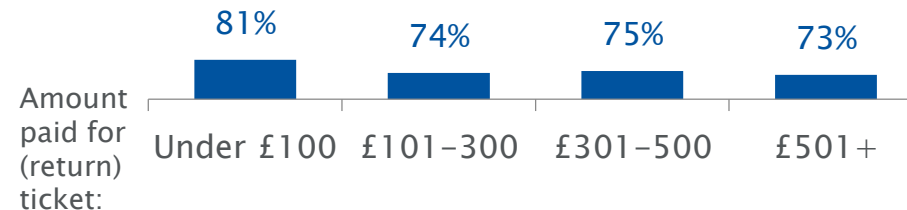
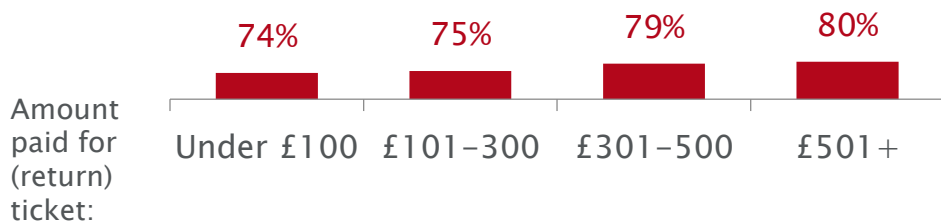
Q28. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied were you with the following elements? Base: all who have flown in the last 12 months, excluding DK and NA responses (n=1965) Q43. Below is a list of services that an airline might provide on a long-haul flight, either as part of the original ticket price, or for an additional fee. Base: All respondents (online only) (n=3002) Q45. 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? Base: All respondents (n=3500)

PRICE PAID FOR TICKETS CORRELATES WITH REPORTS OF DELAYS: THOSE PAYING LESS FOR TICKETS ARE MORE LIKELY TO REPORT MINOR DELAYS

Amount paid for return ticket and expectations/service

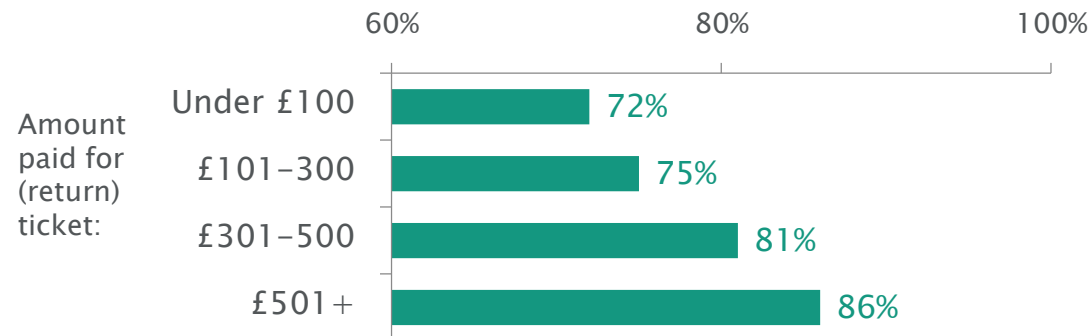
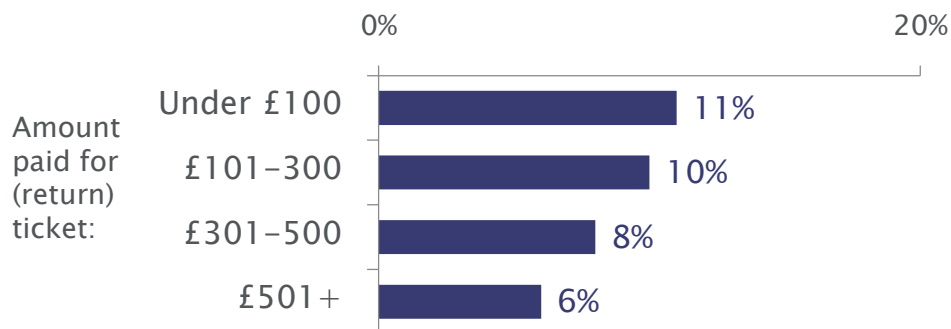
Onboard and in-flight experience: All who are satisfied (n=1957)

Value for money: All who are satisfied (n=1957)



Flight delay of up to 2 hours (n=1967)

20kg of check-in luggage included in price (n=3000)



Satisfaction with the in-flight experience and value for money are unlikely to be driven by the ticket price - meaning that across the board, those who pay more or less for tickets are as likely to be satisfied with their in-flight experience and value for their money.

There is, however, a correlation between ticket price and (reported) likelihood of delays. Passengers are nearly twice as likely to report a delay of up to 2 hours if they paid under £100 for their flight ticket (11%) as opposed to £501+ (6%). Similarly, those who paid less than £100 for their most recent flight are less likely to expect 20kg check-in baggage to be included in their ticket price.

Q27. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight. When answering please think about both the outward and return legs of the flight, including any transfers. How satisfied or dissatisfied were you with the following elements? Base: all who have flown in the last 12 months, excluding DK and NA responses (n=1965) Q33. During this most recent journey, did you experience any of the following issues? Base: All who have flown in the last 12 months (n=1965) Q43. Below is a list of services that an airline might provide on a long-haul flight, either as part of the original ticket price, or for an additional fee. Base: All respondents (online only) (n=3002)

DISABLED PASSENGERS ARE LESS LIKELY TO ENJOY THE AIR TRAVEL EXPERIENCE, PARTICULARLY IN TERMS OF MOVING AROUND THE AIRPORT

Disabled passengers' experiences and views on security

	Agree: All respondents	Agree: Disabled pax
I have confidence in the safety of UK airlines and airports	74%	66%*
Balance between security screening and convenience at UK airports is about right	61%	57%
I enjoy travelling by air	58%	50%
The experience of travelling by air is getting better	39%	40%

	Satisfied: All respondents	Satisfied: Disabled pax
Finding your way to the gate	86%	79%
Ease of finding your way around the airport	85%	76%
Security at the airport	80%	79%
Check-in and bag drop at the airport	80%	78%

**66% of disabled respondents agree with the statement 'I have confidence in the safety of UK airlines and airports'. 11% disagree with the statement, 18% answered 'neither, nor' and 4% answered 'don't know'.*

Disabled respondents are less likely to have confidence in the safety of UK airports than the average passenger (66% vs. 74% avg) and are less likely to feel that the balance between security and convenience is right (57% vs. 61% avg.). Similarly, only half of disabled respondents enjoy travelling by air (50% vs. 58% avg.). Disabled respondents are slightly less likely to be satisfied than the average passenger with some of the highest scoring aspects of the passenger journey – particularly navigating around the airport.

Q13. To what extent do you agree or disagree with the statements. Base: all respondents (n=3500) Respondents with disabilities: (n=734) / Q28. Thinking of more specific aspects of most recent flight, how satisfied or dissatisfied were you with the following? Base: All flown last 12 months (n=1967) Respondents with disabilities: (n=281)

An aerial night view of a city skyline, featuring a prominent skyscraper with a distinctive, illuminated, diamond-patterned facade. The city lights are visible in the background, and a large red diagonal shape is overlaid on the left side of the image.

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