



Civil Aviation Authority: UK Aviation Consumer Survey

June 2019





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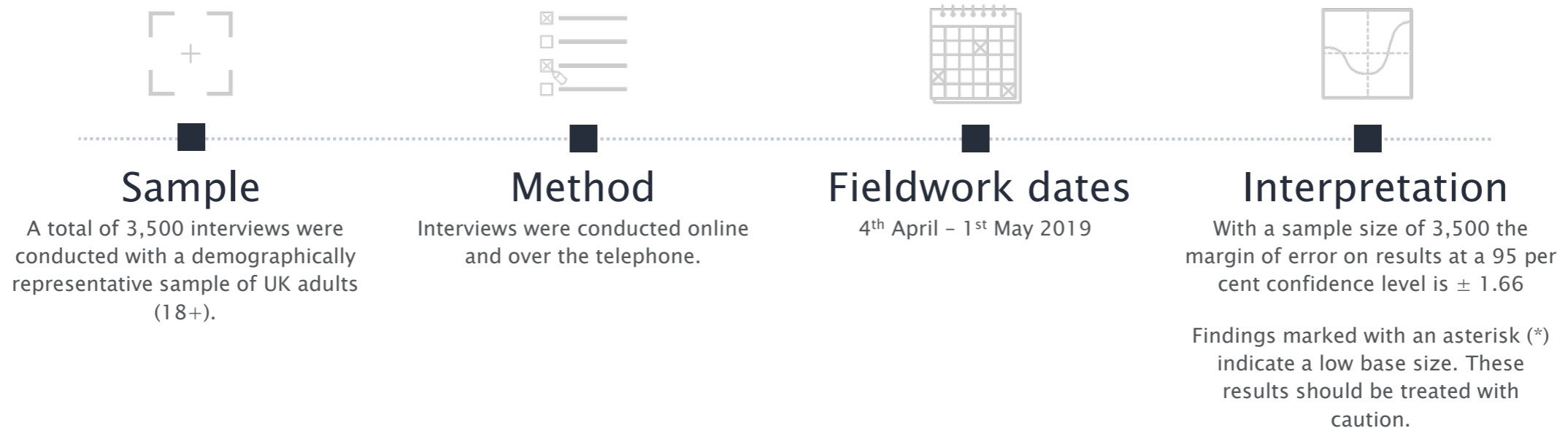
Sections shown in **blue** denote the variable component of the survey. These sections change with every wave of research.





Background and method

The Civil Aviation Authority (CAA) commissioned ComRes, an independent research organisation, to conduct the seventh wave of its bi-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



  Indicates significant differences among demographic sub-groups.



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%	18%
	55-64	15%	15%
	65+	20%	21%
Working Status	Full time	41%	41%
	Part time	17%	17%
	Not working	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%
	East England	9%	9%
	South West	8%	8%
	Wales	5%	5%
	Scotland	8%	8%
Northern Ireland	3%	3%	



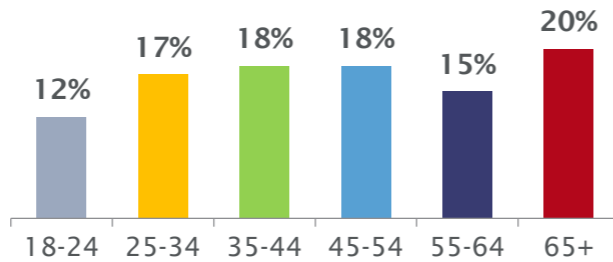
Demographic (Weighted) Sample Profile

Gender

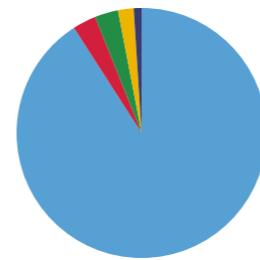


Male 49%
Female 51%

Age



Ethnicity



- White, 92%
- Asian or Asian British, 3%
- Mixed, 3%
- Black or Black British, 1%
- Chinese or other, 1%

Internet Access

99 per cent of those interviewed by phone have internet access



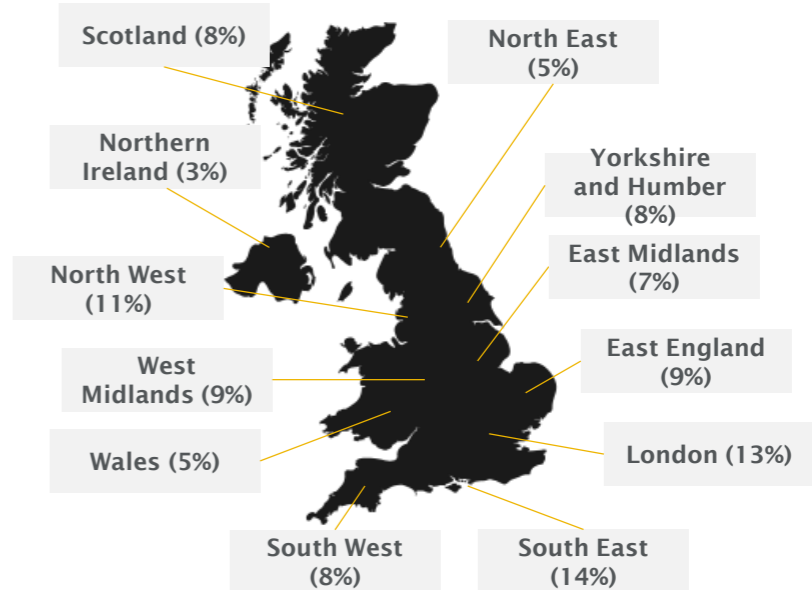
Working Status

Full time (30+ hours per week)	41%
Part time (8-29 hours per week)	15%
Part time (Under 8 hours per week)	2%
Not working	20%
Retired	17%
Homemaker	4%
Student / full time education	2%

Household Income

Up to £14,999	23%
£15,000 – £24,999	20%
£25,000 – £39,000	23%
£40,000 – £74,999	20%
£75,000 or more	7%

Regions





Section 1

Headline Measures

Seven in ten UK adults have confidence in the safety of UK airlines and airports

Similar to previous waves, the majority of UK adults feel positive about safety and security processes, with seven in ten (69%) agreeing that they have confidence in the safety of UK airlines and airports. Similarly, a majority agree that the balance between security screening and passenger convenience is about right (58%).

While still relatively low, the proportion of the UK public who are concerned with the environmental impact of flying has risen significantly since the survey began in 2016.

Three in ten now think about the impact of flying on the environment when deciding whether to travel by air (31%), or agree that they would pay more for tickets to reduce the environmental/noise impact of flying (31%). This compares to just over one fifth of those surveyed in late 2016.

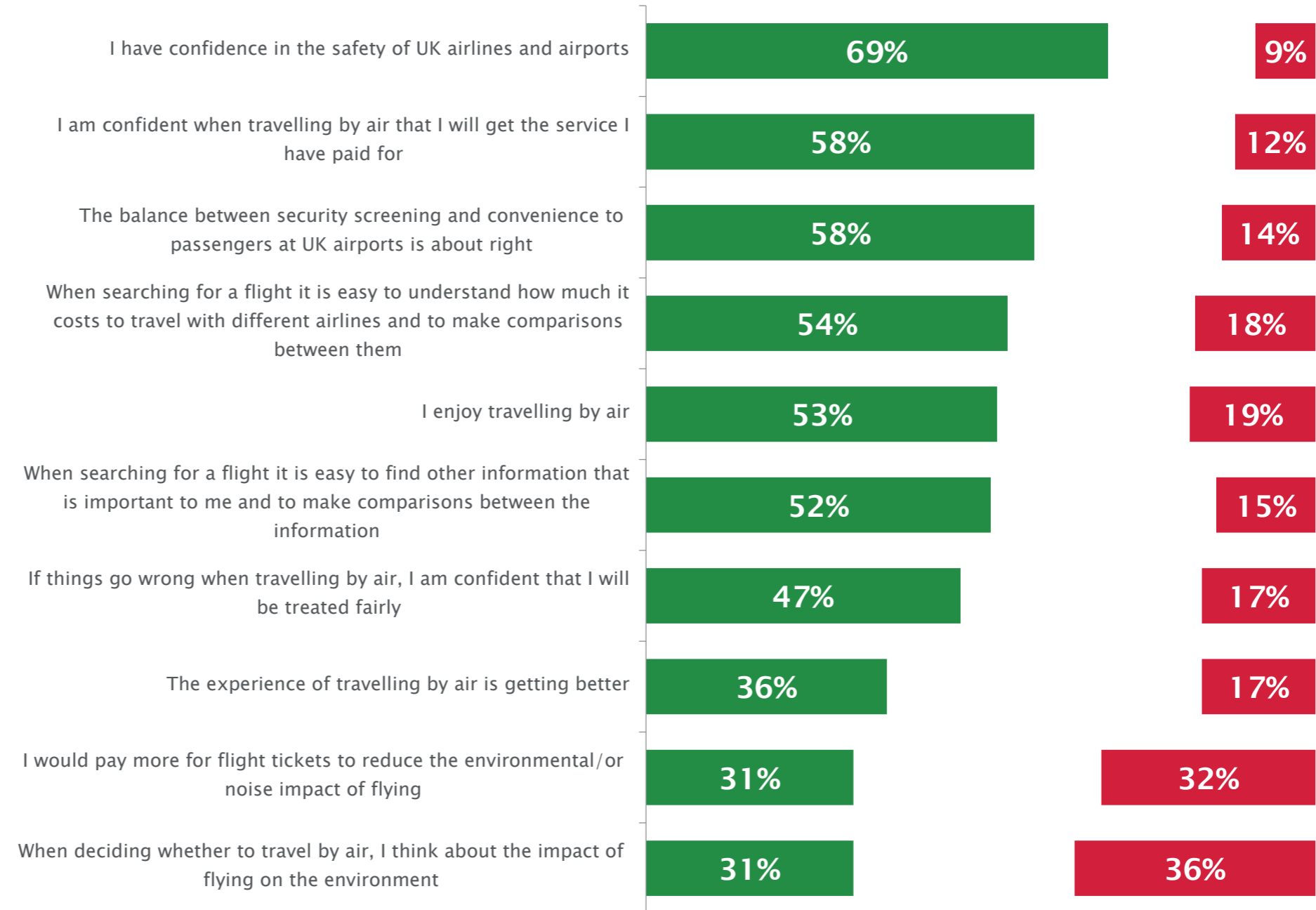
Statements about travelling by air

All respondents



NET: Agree

NET: Disagree



Q12. 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)

Differences in responses to statements about travelling by air but region, income age and employment status



Statements about travelling by air

	NET: Agree		NET: Disagree	
I have confidence in the safety of UK airlines and airports	69%	▲ Age 55+ 76% ▲ >£50k 78%	9%	▲ Age 18-34 12% ▲ N. Ireland 19%
I am confident when travelling by air that I will get the service I have paid for	58%	▲ >£50k 65% ▲ Scotland 66%	12%	
The balance between security screening and convenience to passengers at UK airports is about right	58%	▲ >£50k 63% ▲ North East 64%	14%	▲ N. Ireland 28%
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	54%	▲ >£50k 62% ▲ Scotland 64%	18%	▲ Age 55+ 22%
I enjoy travelling by air	53%	▲ >£50k 61% ▲ Scotland 62%	19%	▲ East England 24%
When searching for a flight it is easy to find other information that is important to me and to make comparisons between the information	52%	▲ Full time employment 60% ▲ Scotland 59%	15%	▲ Age 55+ 18% ▲ East England 19%
If things go wrong when travelling by air, I am confident that I will be treated fairly	47%	▲ Scotland 56%	17%	▲ >£50k 22% ▲ London 23%
The experience of travelling by air is getting better	36%	▲ 18-34 45% ▲ Scotland 47%	17%	▲ Age 55+ 22%
I would pay more for flight tickets to reduce the environmental or noise impact of flying	31%	▲ 18-34 39% ▲ Northern Ireland 42%	32%	
When deciding whether to travel by air, I think about the impact of flying on the environment	31%	▲ London 35% ▲ Age 18-34 40%	36%	▲ Age 55+ 42% ▲ >£50k 44%

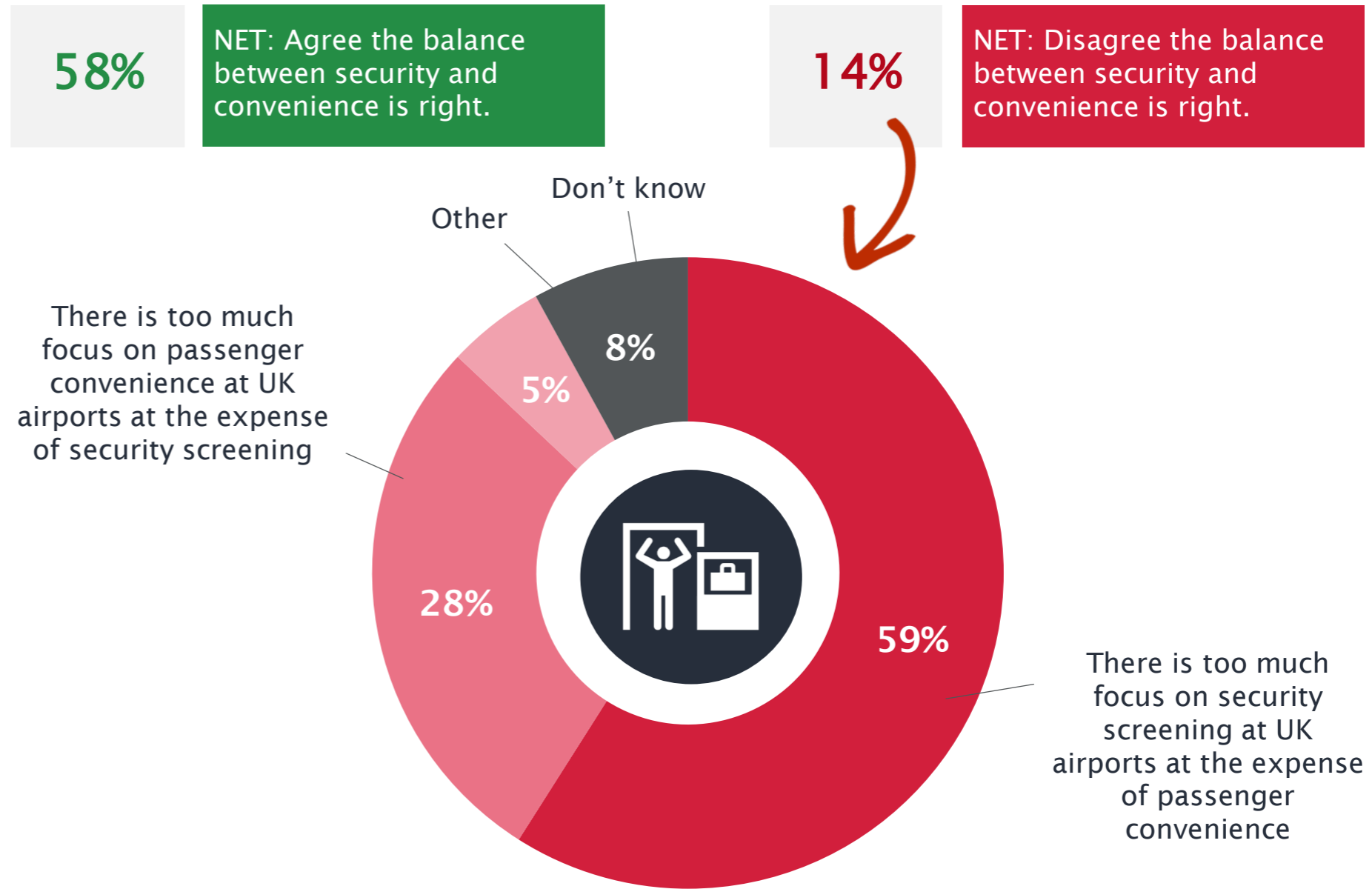


Security vs. Convenience Balance

Three in five agree that the balance between security screening and passenger convenience is about right

Three in five (58%) respondents agree that the balance between security and passenger convenience is about right.

The 14% who disagree are more likely to say that there is too much focus on security screening to the expense of passenger convenience (59%) than the other way round (28%). This is down 9 percentage points from 68% in October 2018.



Q12. 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)

Q13. 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 at UK airports and convenience to passengers is about right (n=498)

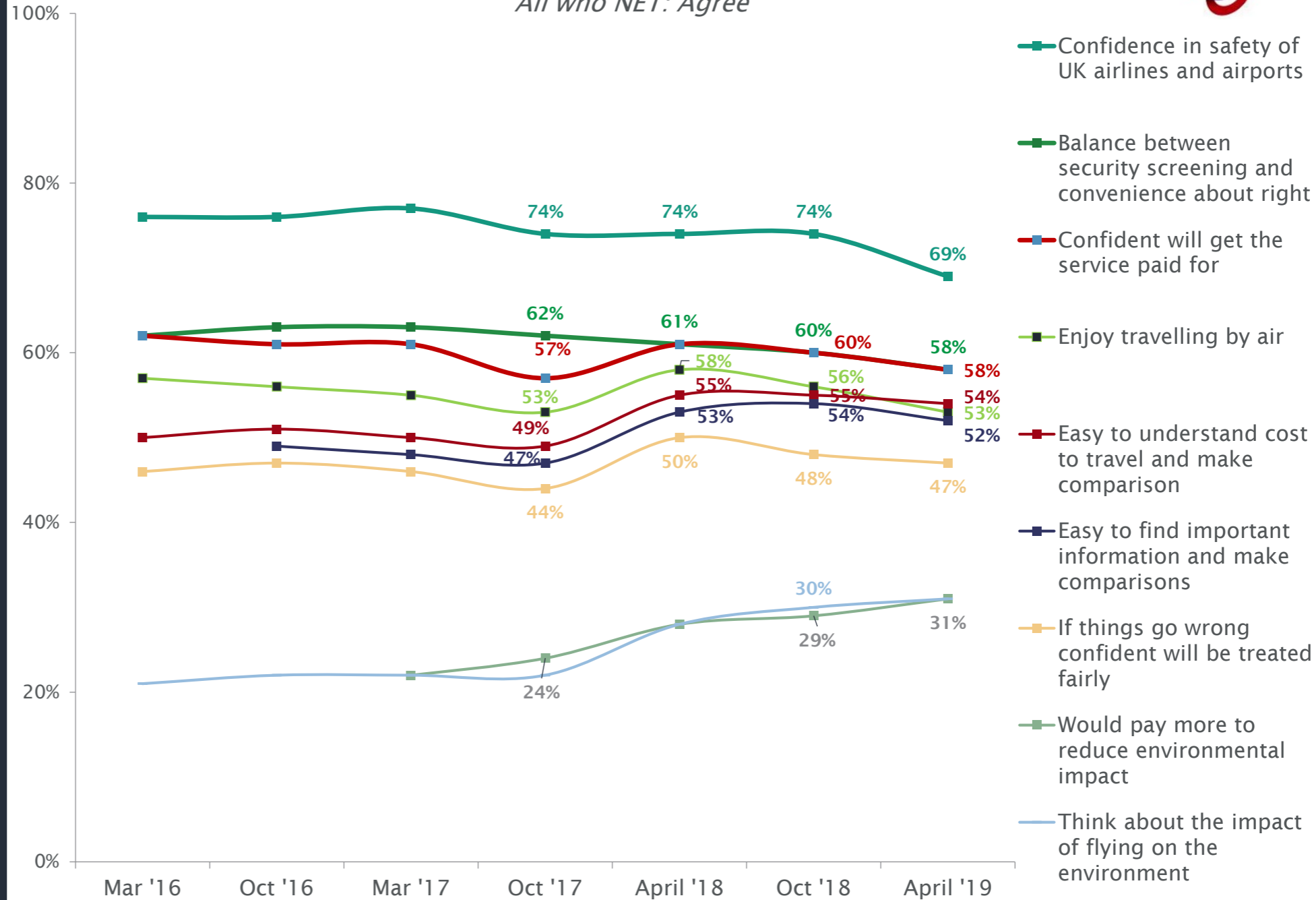
Positive views towards travelling by air have dipped since Autumn 2018

All metrics remain broadly the same compared to passenger responses in Autumn last year. However, UK adults are less likely now than in October 2018 to say that they are confident in the safety of UK airlines and airports (69%).

The environmental consciousness of passengers is the area that continues to improve the most. Three in ten say that they would think about the environmental impact of flying (31%), or would pay more to reduce this impact (31%) continuing a steady increase since tracking began.

Headline Measures: Trend

All who NET: Agree



Q12. 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)



Headline measures: Overall

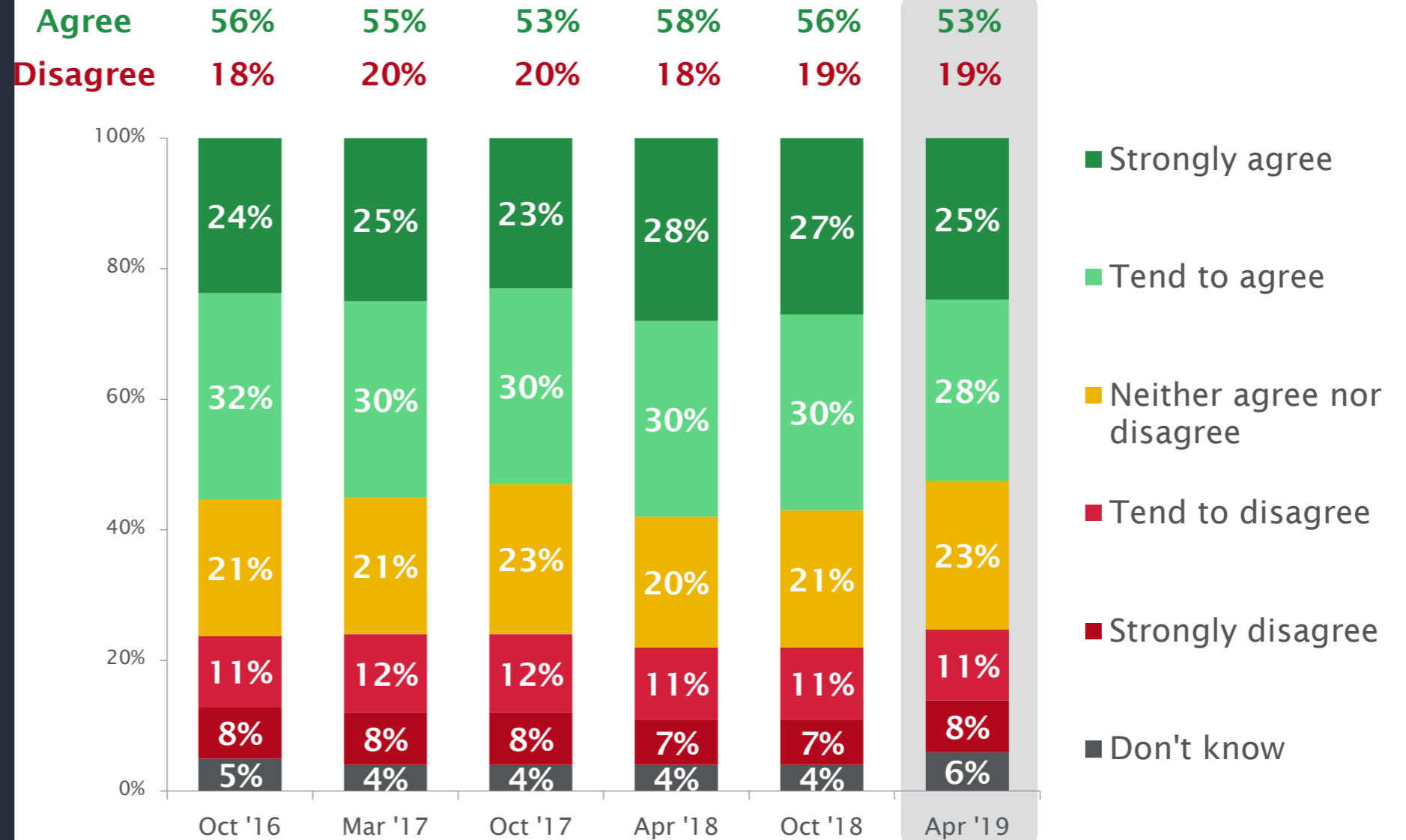
I enjoy travelling by air

UK adults are slightly less likely to agree that they enjoy travelling by air compared to Spring 2018

The proportion of passengers who say they enjoy travelling by air has dropped slightly since the previous wave, with just over half (53%) agreeing with this statement (vs. 56% October 2018). Approaching one in five (19%) disagree with the statement (vs. 19% October 2018), unchanged from Autumn 2018.

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

- Scottish passengers are more likely to agree with the statement than adults from other UK regions, with three in five (62%) doing so.
- Those with higher incomes are more likely than those with lower incomes to agree with this statement (61% > £50k vs. 52% < £50k).
- 25% of those surveyed describe themselves as having a disability/health condition that limits their day-to-day activities.
- Members of this group are less likely agree with this statement than non-disabled passengers (48% vs. 55% respectively).



Q12. 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)

Passengers are in line with the previous wave in agreeing that it is easy to understand the cost of travel or to find important information to make comparisons

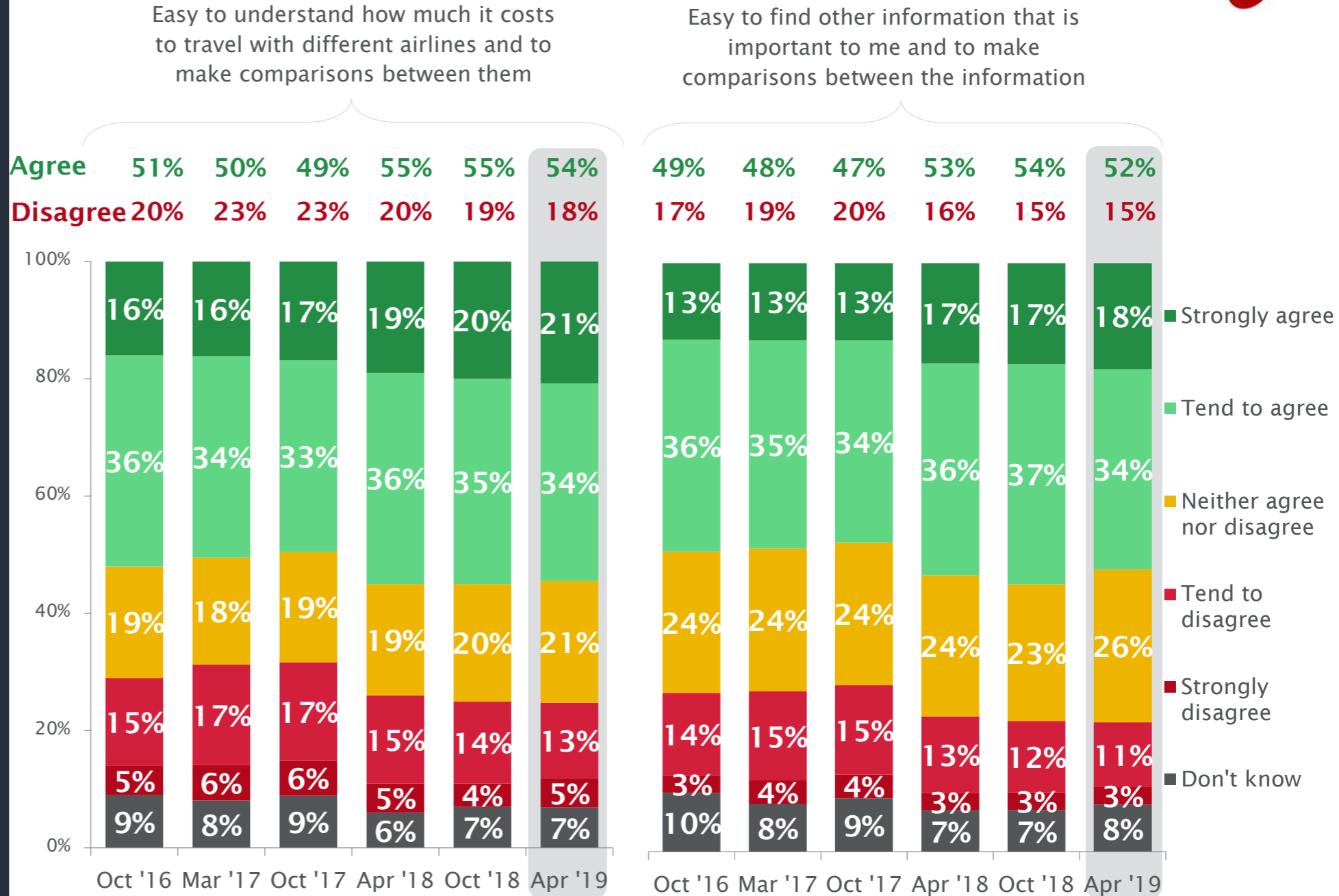
UK adults remain consistent in their thoughts regarding the clarity of travel costs with different airlines and ease of comparison between them, with 54% agreeing with this is in line with October 2018's results. Respondents also remain broadly consistent with their views on consumer information: 52% agree that it is easy to find other important information (compared to 54% in October 2018), whilst only 15% disagree, the same as in October 2018)

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

- UK adults with an annual income of £50,000 or more (62% and 58% agree with each of the statements);
- Scottish passengers (64% and 59% respectively).

Those with a disability are less likely to agree that it is easy to understand the cost of travel and make comparisons between them (50% vs. 56% non-disabled), or to find other information that is important to them and to make comparisons between the information (45% vs. 55% non-disabled).

Headline measures: Consumer Choice



Q12. 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)

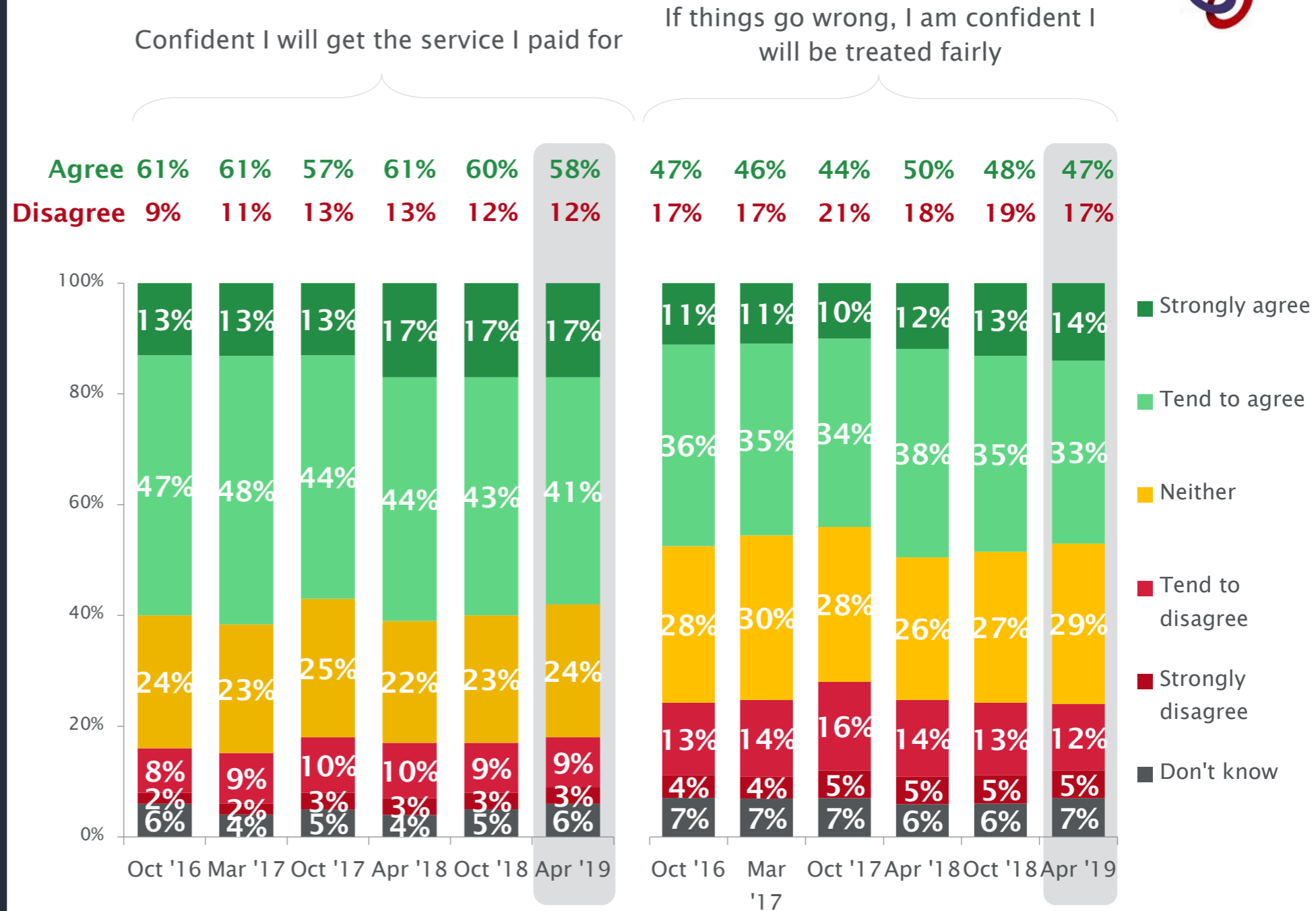


Headline measures: Consumer Confidence

Levels of consumer confidence are in line with the previous wave across both measures

Three in five adults (58%) agree that they are confident they will get the service they paid for, and just under half (47%) agree that they are confident they will be treated fairly when things go wrong. This remains in line with findings from the previous wave (60% and 48% respectively October 2018), the same as last year.

- Scottish passengers are significantly more likely to agree, with two thirds (66%) saying that they are confident they will get the service they paid for.
- Non-disabled passengers are also more likely to agree with this than disabled passengers (61% vs. 53% respectively).



Q12. 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)

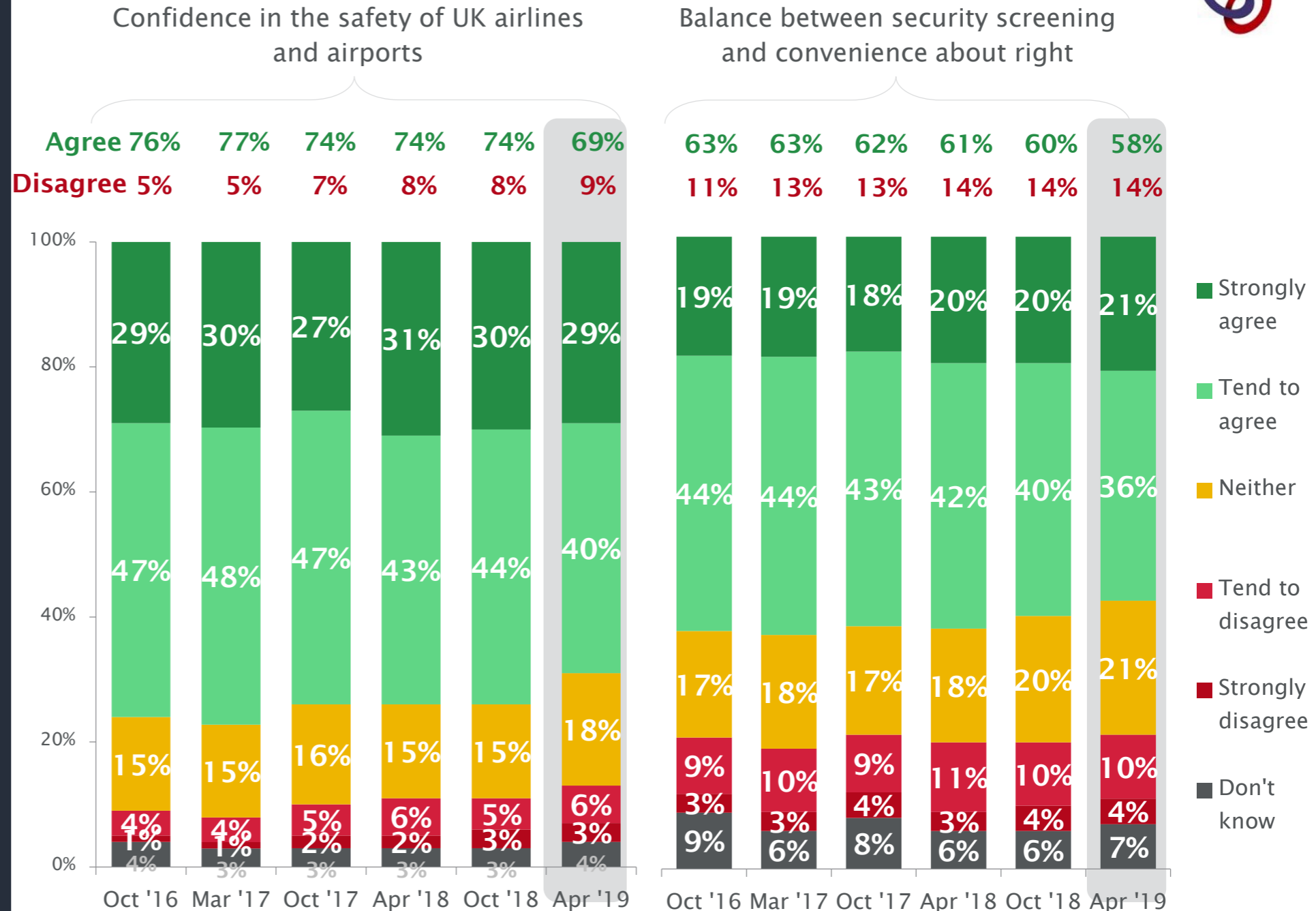


A majority of UK adults feel positive about flight safety and airport security, in line with Autumn 2018

Seven in ten (69%) are confident in the safety of UK airlines and airports, down 5 percentage points from 74% in Autumn '18. This figure had previously remained consistent. Whilst three in five (58%) consider the balance between airport security screening and passenger convenience to be about right, this has dropped slightly since October 2018.

- Those aged 55+ are significantly more likely to be confident in air travel safety, with 76% agreeing with this compared to only 61% of younger adults aged 18-34.
- Regional data indicates that Scottish adults are more confident as well, with nearly four in five (78%) agreeing with this.
- Disabled passengers are significantly less likely than non-disabled to agree that this balance is about right (54% vs. 60%).

Headline measures: Security and Safety



Q12. 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)

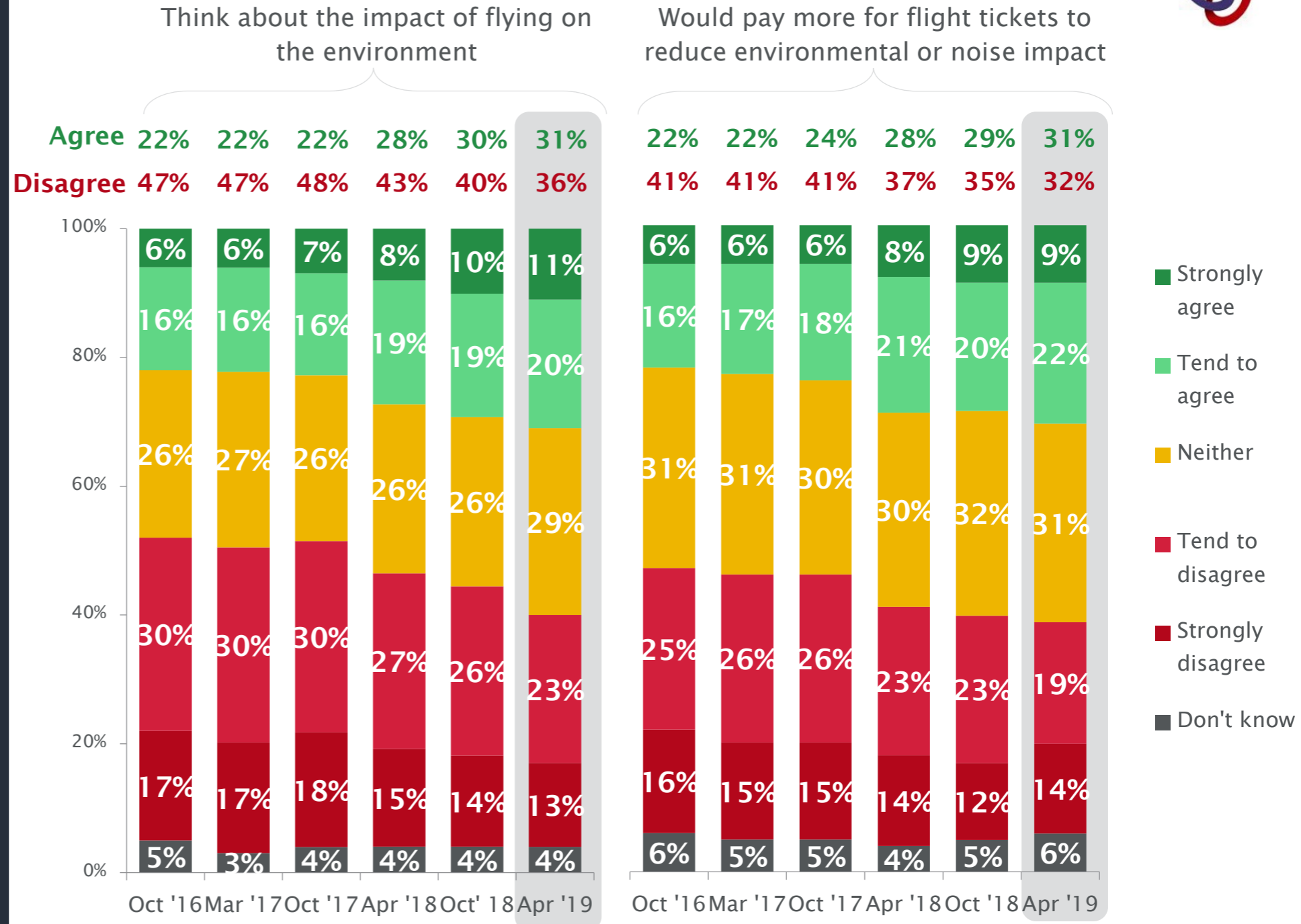


Same as the last wave, consideration of the environmental impact of flying has grown since Autumn 2016

Three in ten UK adults (31%) say that they would think about the impact of flying on the environment. Similarly, 31% agree that they would be willing to pay more for tickets to reduce the environmental or noise impact of flying, up 2 percentage points from 29% in October 2018. More specifically:

- Those aged 18–34 are again more likely to agree that they think about the environmental impact of flying compared to those aged 55+ (40% vs. 23% respectively), and more likely that they would pay more to reduce this impact (39% vs. 26% respectively).
- Attitudes towards the environmental impact of flying are relatively consistent across the UK, although Northern Irish adults are more likely to say they would pay more for tickets to reduce the environmental impact of flying (42%).

Headline measures: Environment



Q12. 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 photograph of an airplane wing and tail against a sunset sky with clouds. The sun is low on the horizon, creating a warm, golden glow. The sky is filled with large, white, fluffy clouds. The airplane's wing and tail are visible in the foreground, extending from the bottom left towards the top right.

Section 2

Flying Behaviour

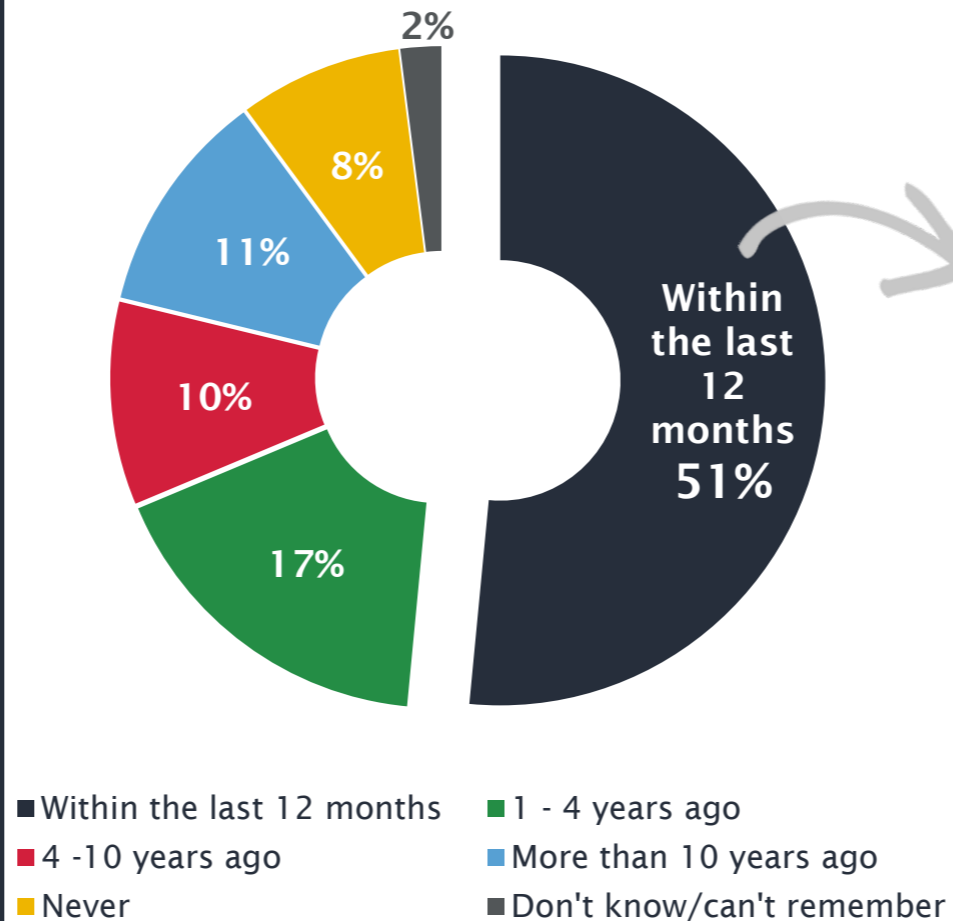


Half of UK adults have flown from a UK airport within the last year

Half (51%) of UK adults have flown from a UK airport within the last 12 months, whilst only 8% have never flown before. Those with higher incomes, or living in London or Scotland are more likely to have flown in the last 12 months than other demographics. Overall, the proportion of UK adults who have flown recently has continued to decrease, down from 54% in October 2018 and 56% in April 2018.

Those who have flown in the last year are most likely to have taken one (30%) or two (29%) flights, while approximately one in ten (11%) have flown over 5 times in that period.

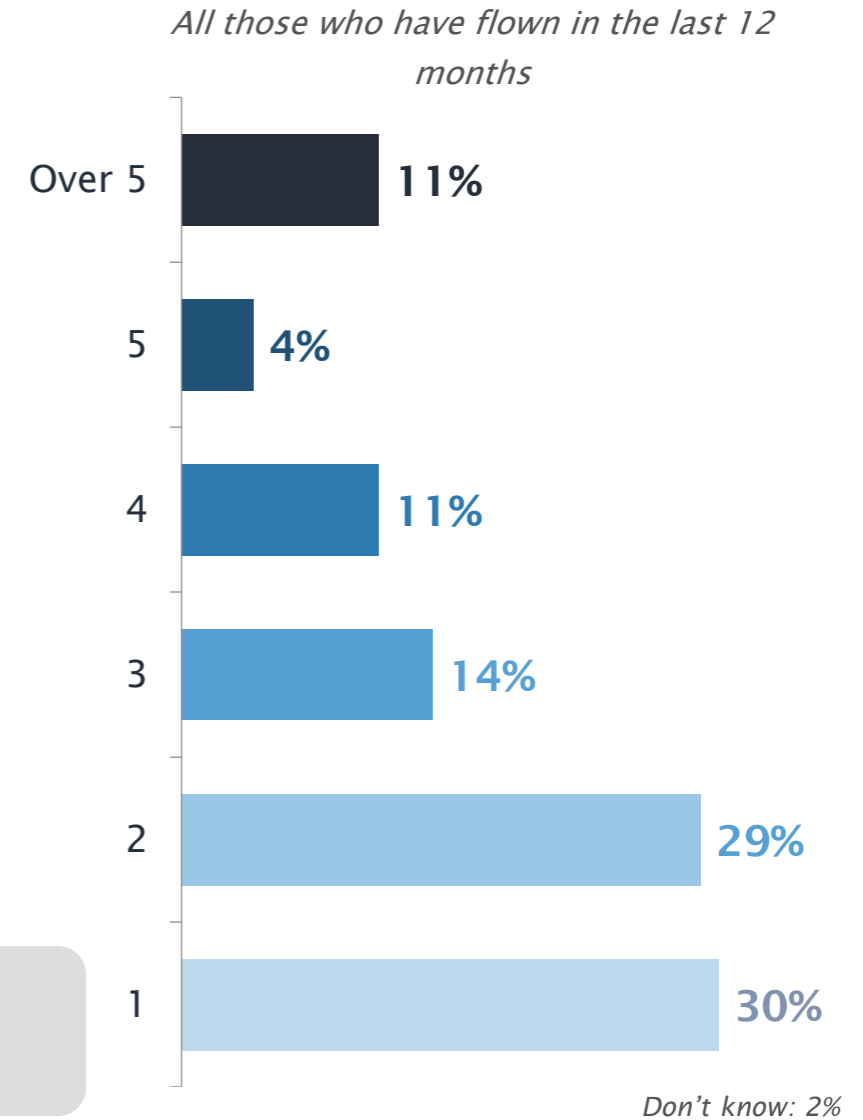
Time since flight from a UK airport



Within last 12 months:

- ▲ London 63%
- ▲ >£50k 78%
- ▲ Scotland 64%
- ▼ October 2018 54%

Number of flights in the last 12 months



Q1. When was the last time you flew from a UK airport? This could have been either to travel within the UK or to go abroad. This could have been from any airport, not just your nearest one. Base: All respondents (n=3500)

Q2. How many trips by air have you made in the last 12 months? Please count outward and return flights and any transfers as one trip. If you are not sure then your best estimate is fine. Base: All who have flown in the last 12 months (n=1812)

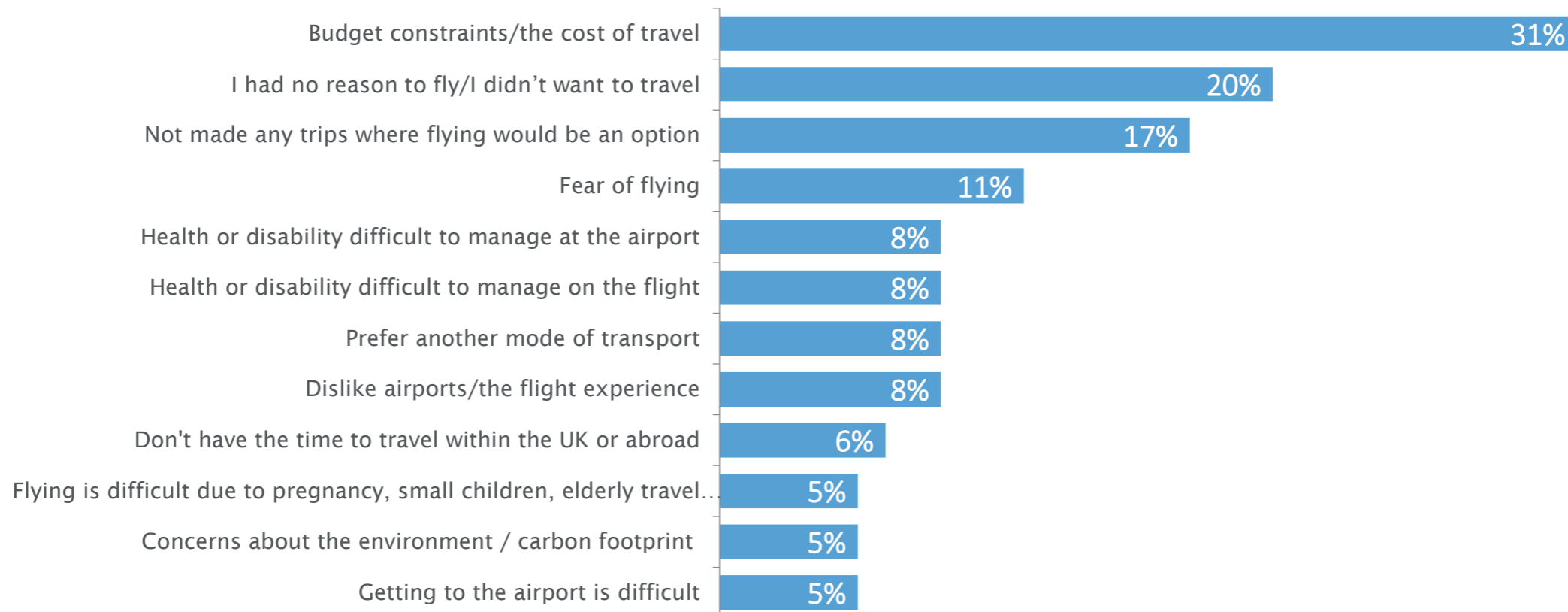
Budget constraints and the cost of travel remain unchanged as the greatest barriers to flying



Barriers to flying in the past 12 months

All those who have not flown recently

Showing all responses of 5% and over



Budget constraints and/or the cost of travel remain the most common barriers to flying in the last year, with 31% of non-recent flyers citing this as the main reason. This remains consistent with the results of the previous wave (31% in October 2018).



Passengers are still most likely to say that they purchased a return flight worth £101–£300 for their last trip

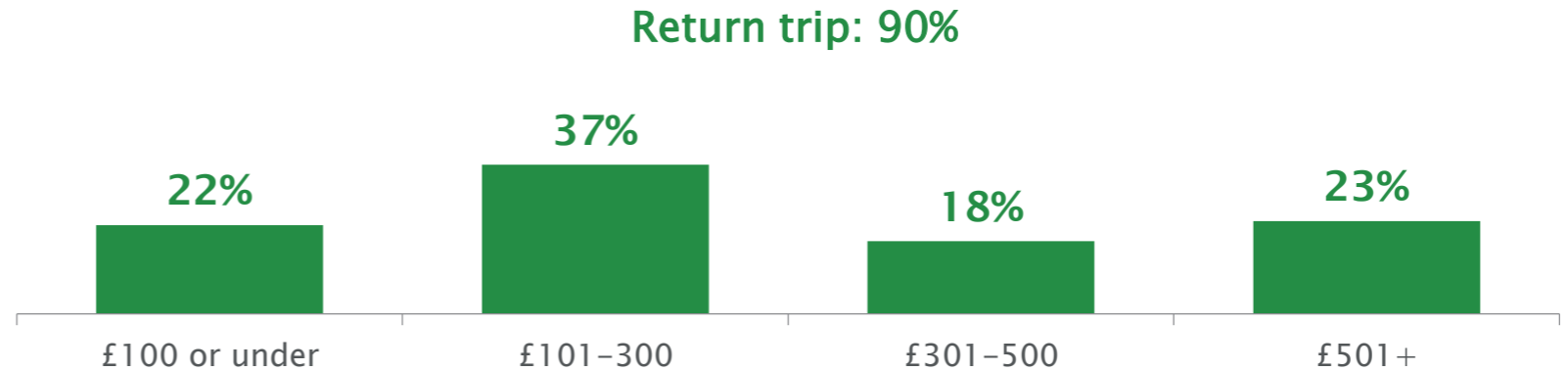
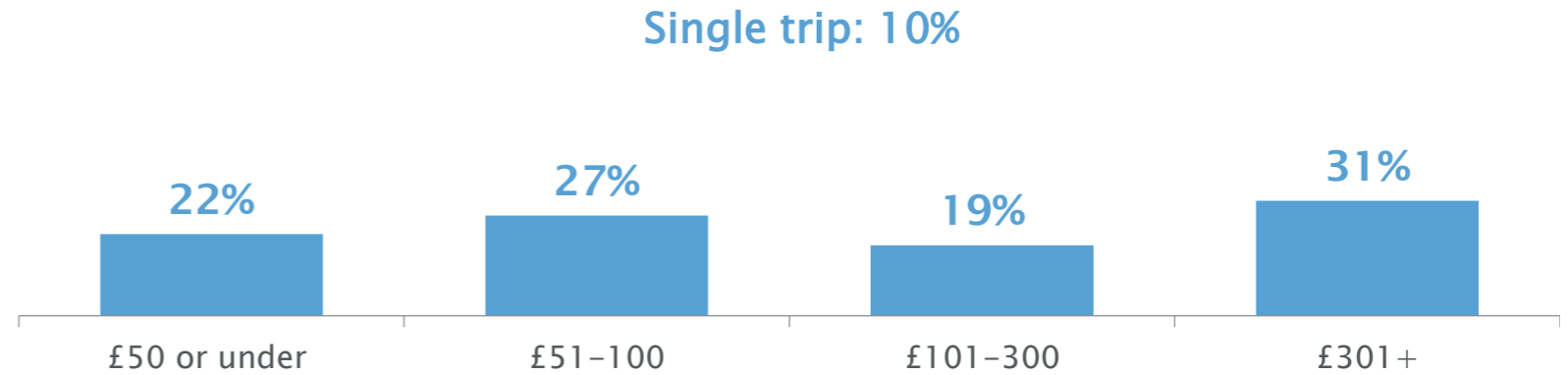
The vast majority of passengers (90%) who flew from a UK airport in the last 10 years purchased a return ticket.

Around one in five (22%) of those who purchased a return ticket spent under £100 or over £500 (23%), but overall, return trip passengers were most likely to have spent between £101 and £300 (37%) for their ticket.

Price paid per ticket does not seem to significantly impact satisfaction rates with the overall travel experience.

Price paid for last flight

All those who have flown from a UK airport in the last 10 years



In line with the previous wave, a majority of passengers say that their experience of flying over the last five years is either getting better or is about the same

More than half (56%) of passengers who have flown from a UK airport in the last decade would say that their experience of flying is about the same relative to the last 5 years, and a quarter (26%) say that flying is getting better.

Only one in seven (14%) say that, from their experiences of flying over the past 5 years, flying is getting worse.

In particular, younger passengers are more likely than their older counterparts to say that flying is getting better (36% 18–34 vs. 21% 55+). Accordingly, passengers aged 55+ are more likely to say that flying is getting worse (19% 55+ vs. 7% respectively).

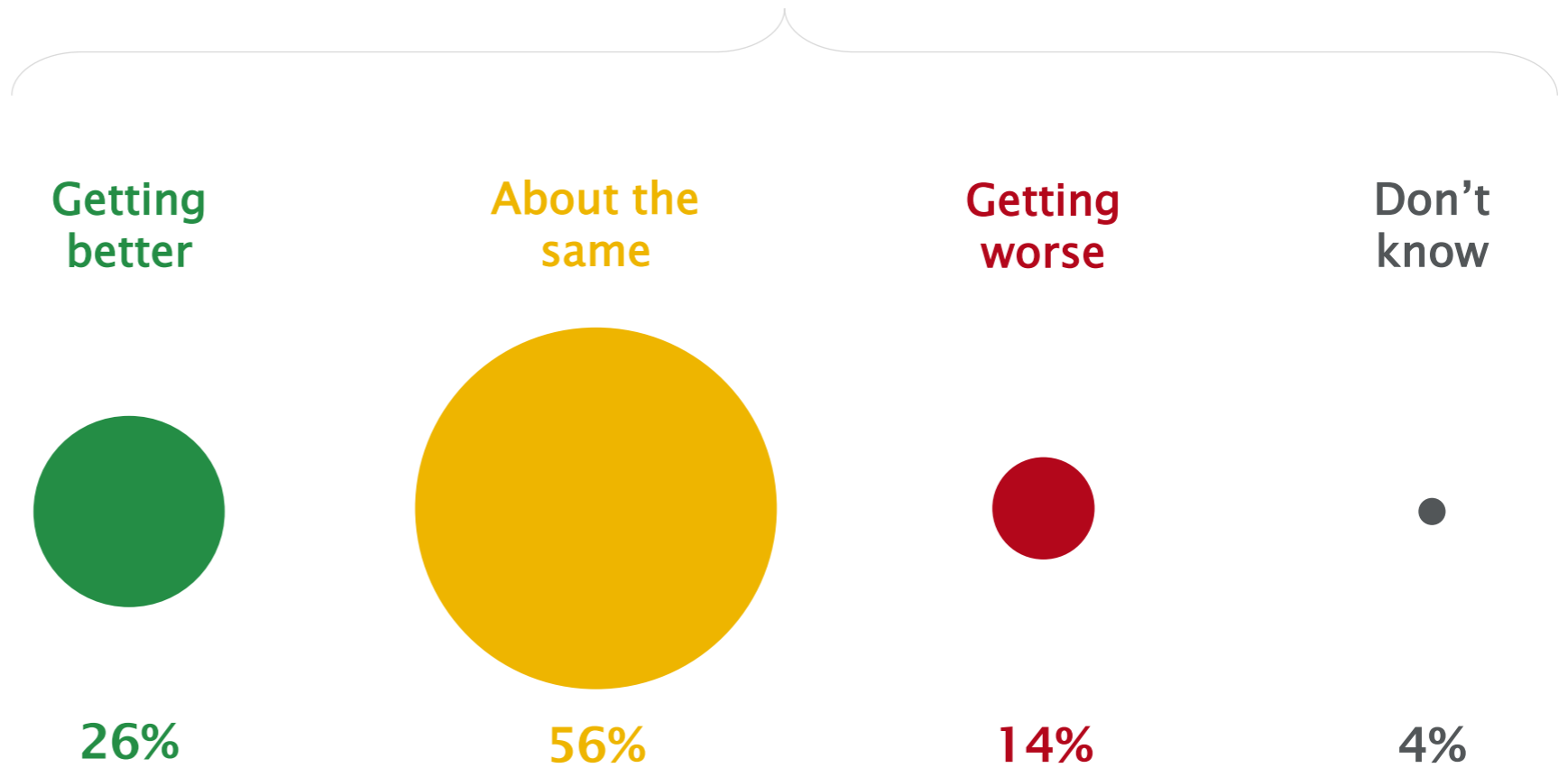
Disabled passengers are considerably more likely than those without a disability to say that the experience of flying is getting better (35% vs. 24% respectively).



Perceptions of flying experience over time

All those who have flown from a UK airport in the last 10 years

Thinking about your experiences of flying over the last five years, would you say that flying is...



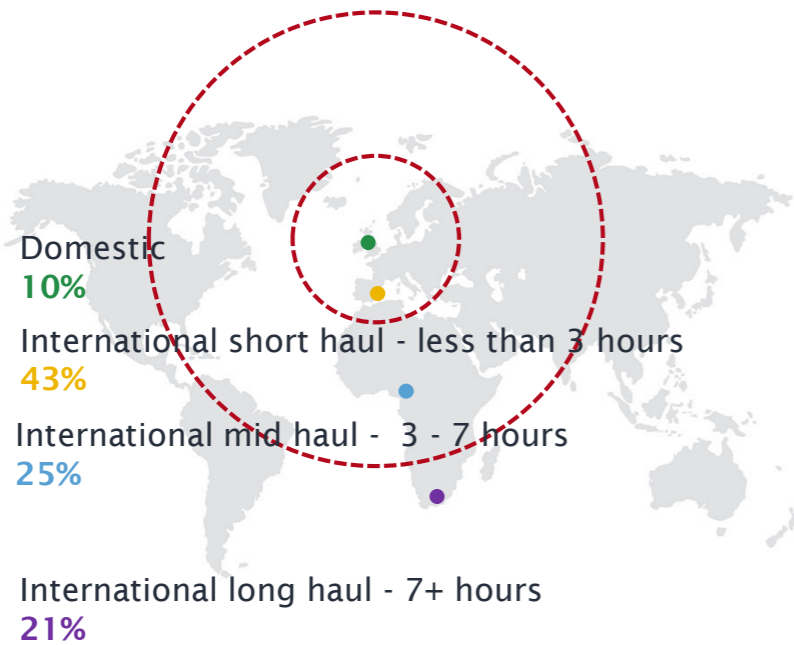
Q4. Thinking about your experiences of flying over the last five years, would you say that flying is... Base: All who have flown from a UK airport in the last 10 years. (n=2759)



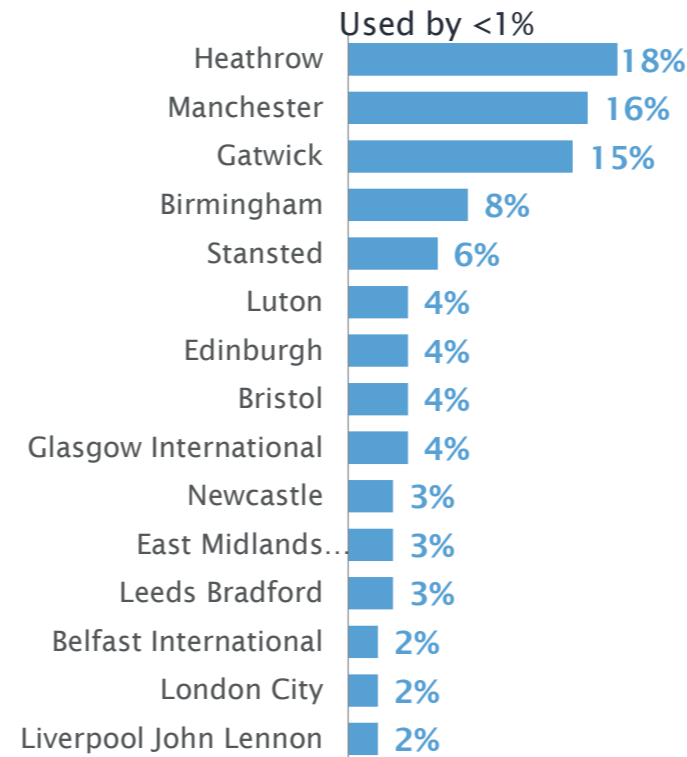
International short haul flights remain the most common flights taken by recent passengers

Domestic or international flight

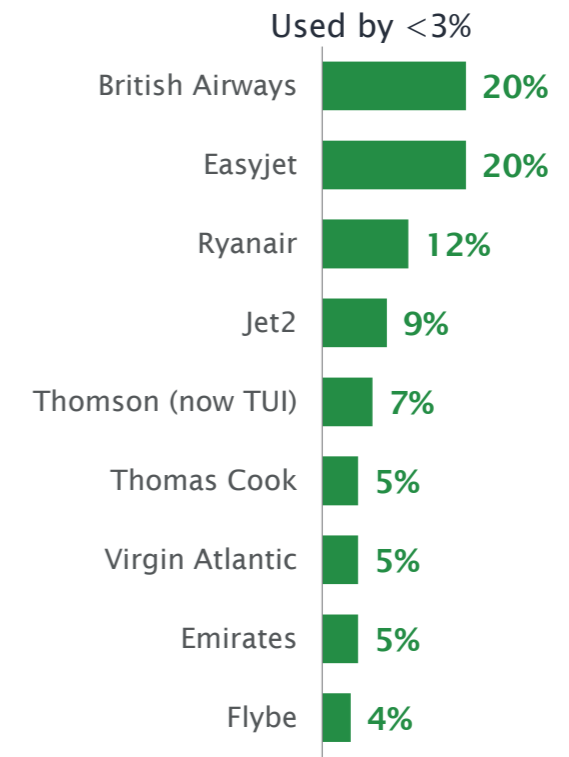
All recent flyers



Departure airport



Airline used



International short haul flights (less than 3 hours long) remain the most common flights taken by those who have flown within the last year (43%). By comparison, only a quarter of recent flyers took international mid haul flights of 3–7 hours, and one in ten took domestic flights (25% and 10% respectively).

Heathrow (18%) is the most popular departure airport amongst recent flyers, followed closely by Manchester (16%) and Gatwick (15%). In October 2018, Manchester was the most popular departure airport amongst recent flyers. Recent flyers are more likely to have flown with Easyjet and British Airways, with one in five (20%) using these two airlines, whilst one in seven (12%) used Ryanair.

Q14. Earlier you said that you have flown within the last 12 months. We'd like to find out more about your most recent experience of flying. Firstly, was your most recent flight domestic (i.e. within the UK) or international? If international, how long was the flying time? Base: All who have flown from a UK airport in the last 12 months (n=1812)

Q16. Which airline or airlines did you fly with on your most recent trip? Base: All who have flown from a UK airport in the last 12 months (n=1812)

Q17. What was your departure airport in the UK? Base: All who have flown from a UK airport in the last 12 months (n=1812)

The vast majority of recent flyers travelled for leisure, with fewer than one in ten travelling for business

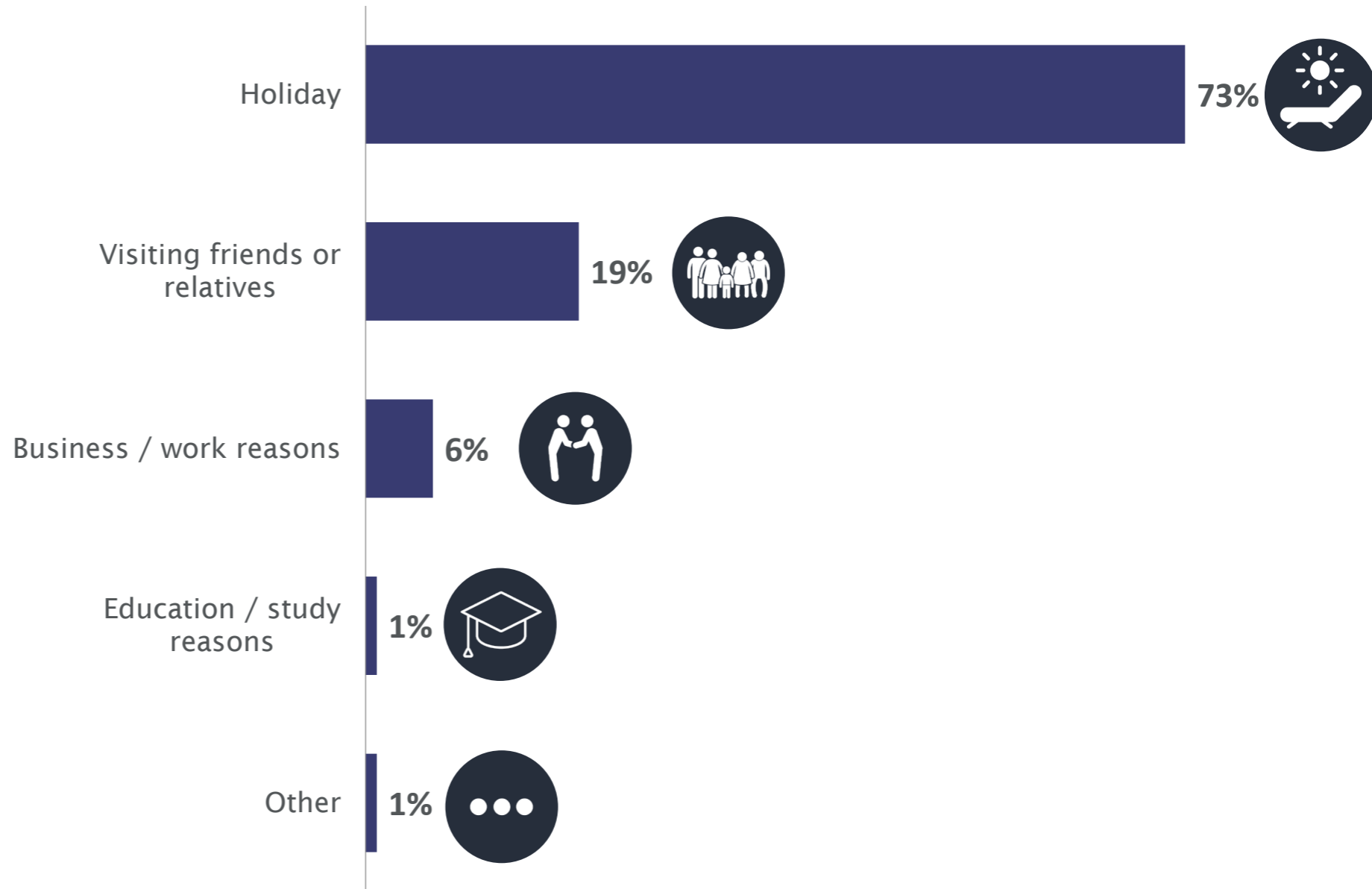
Seven in ten (73%) recent flyers travelled to go on holiday – the most common reason for flying.

Only one in five (19%) flew to visit friends/relatives, and fewer than one in ten (6%) travelled because of business/work.



Main purpose of last flight

All those who have flown in the last 12 months





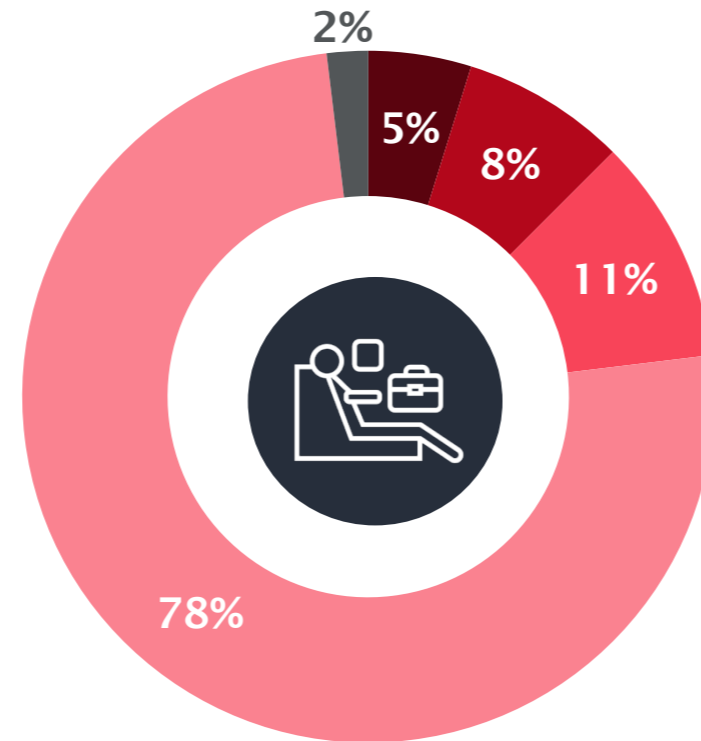
The vast majority of passengers fly economy class, and a similar proportion fly without children

Eight in ten (78%) recent flyers purchased economy class tickets, up 5 percentage points on Autumn 2018's wave, with only 5% travelling first class.

The vast majority (82%) of recent flyers travelled without children the last time they flew. The proportion of recent flyers who travelled with children has dropped 9 percentage points from 27% in Autumn 2018. This is most likely due to seasonal variations in the number of families who travel, although this proportion is still below the figure recorded in Spring 2018 (24%).

Cabin class

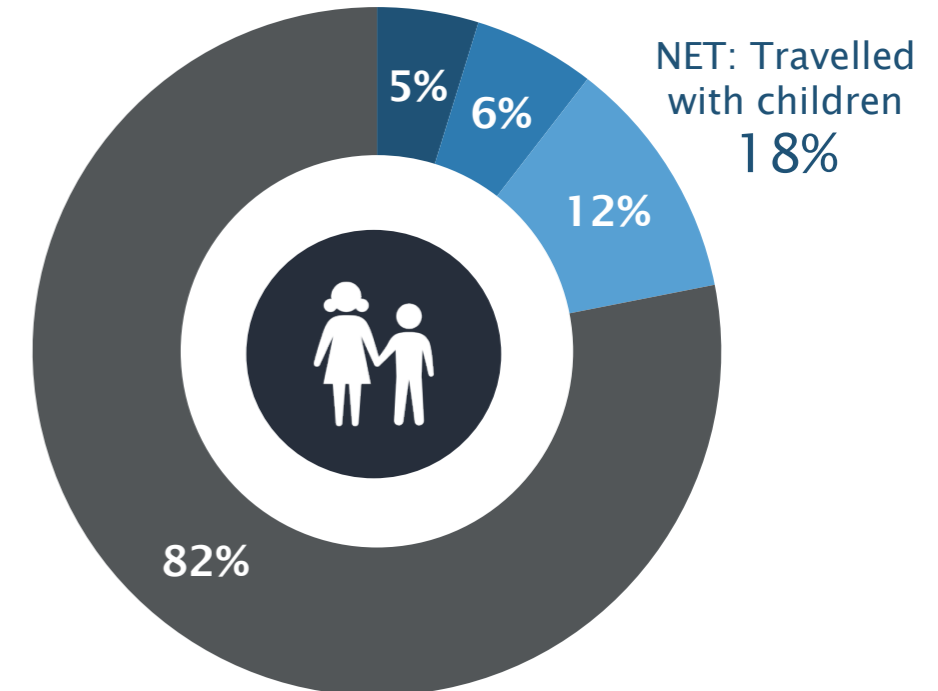
All those who have flown in the last 12 months



- First class
- Business class
- Premium Economy
- Economy
- Don't know

Travelling with children on last flight

All those who have flown in the last 12 months



- Children aged 0-2
- Children aged 3-5
- Children aged 6 - 17
- I did not travel with children

Q19. Which cabin class did you travel in the last time you flew? (If you travelled in different classes for your outbound and return flight, please select all that apply) Base: All who have flown from a UK airport in the last 12 months (n=1812)

Q22. Did you travel with children on this occasion? Base: All who have flown from a UK airport in the last 12 months (n=1812)



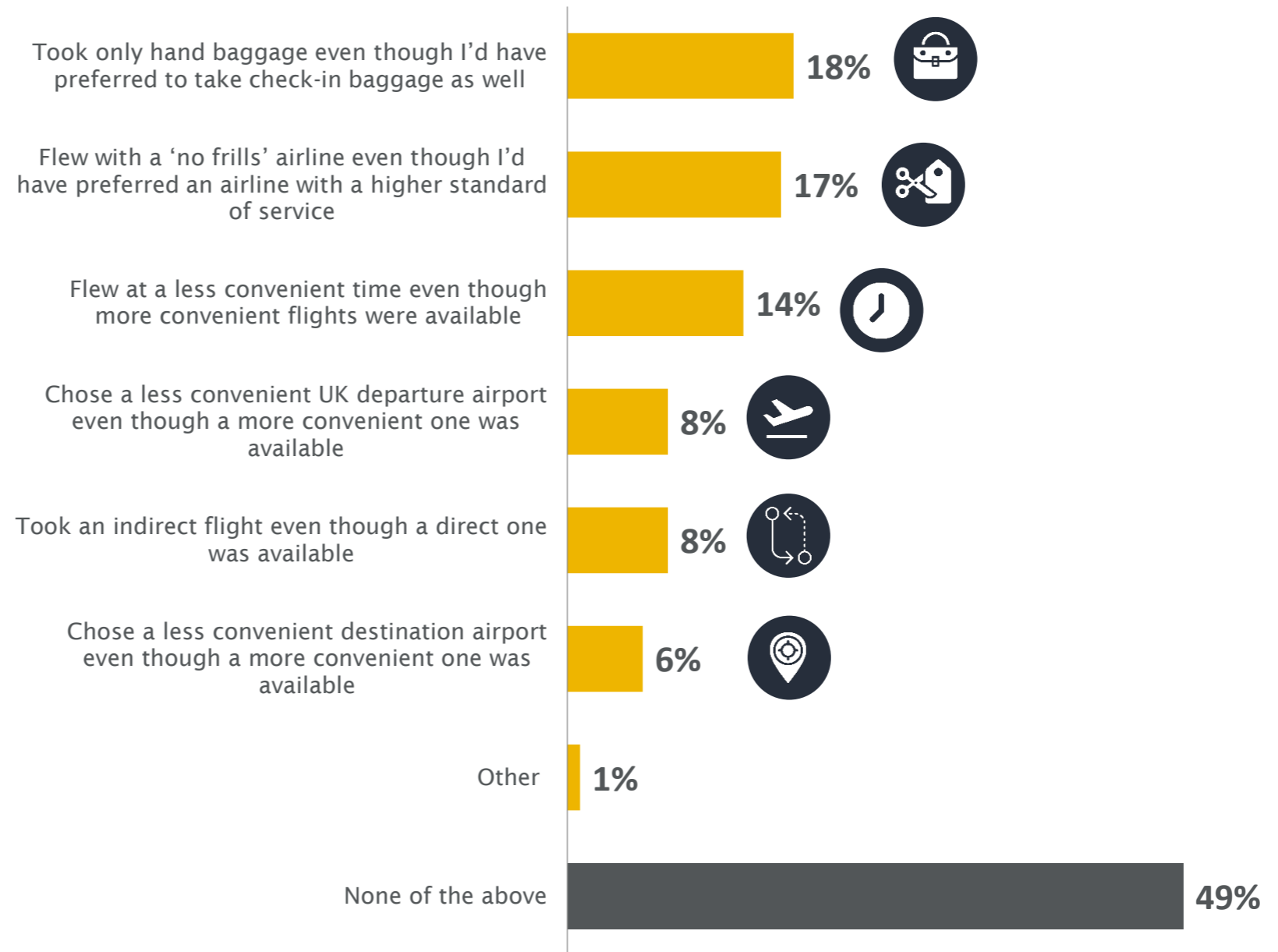
Taking only hand baggage or flying with a 'no frills' airline were the most common means used to save money by recent flyers on their last journey

Around half of recent flyers took some steps to save money on their last flight. Around one in five took only hand baggage (18%) or flew with a 'no frills airline' (17%). A similar proportion (14%) flew at a less convenient time even though more convenient flights were available.

Younger passengers are more likely than their older counterparts to have done any of the cost-saving measures tested, particularly choosing a less convenient UK departure airport (16% 18-34 vs. 3% 55+), taking an indirect flight even though a direct one was available (13% vs. 2% respectively). In comparison, deciding to fly with a 'no frills' airline was fairly ubiquitous across passengers of different ages (17% 18-34, 20% 35-54 and 15% 55+).

Steps taken to save money on last flight

All those who have flown in the last 12 months





Section 3

Satisfaction Ratings

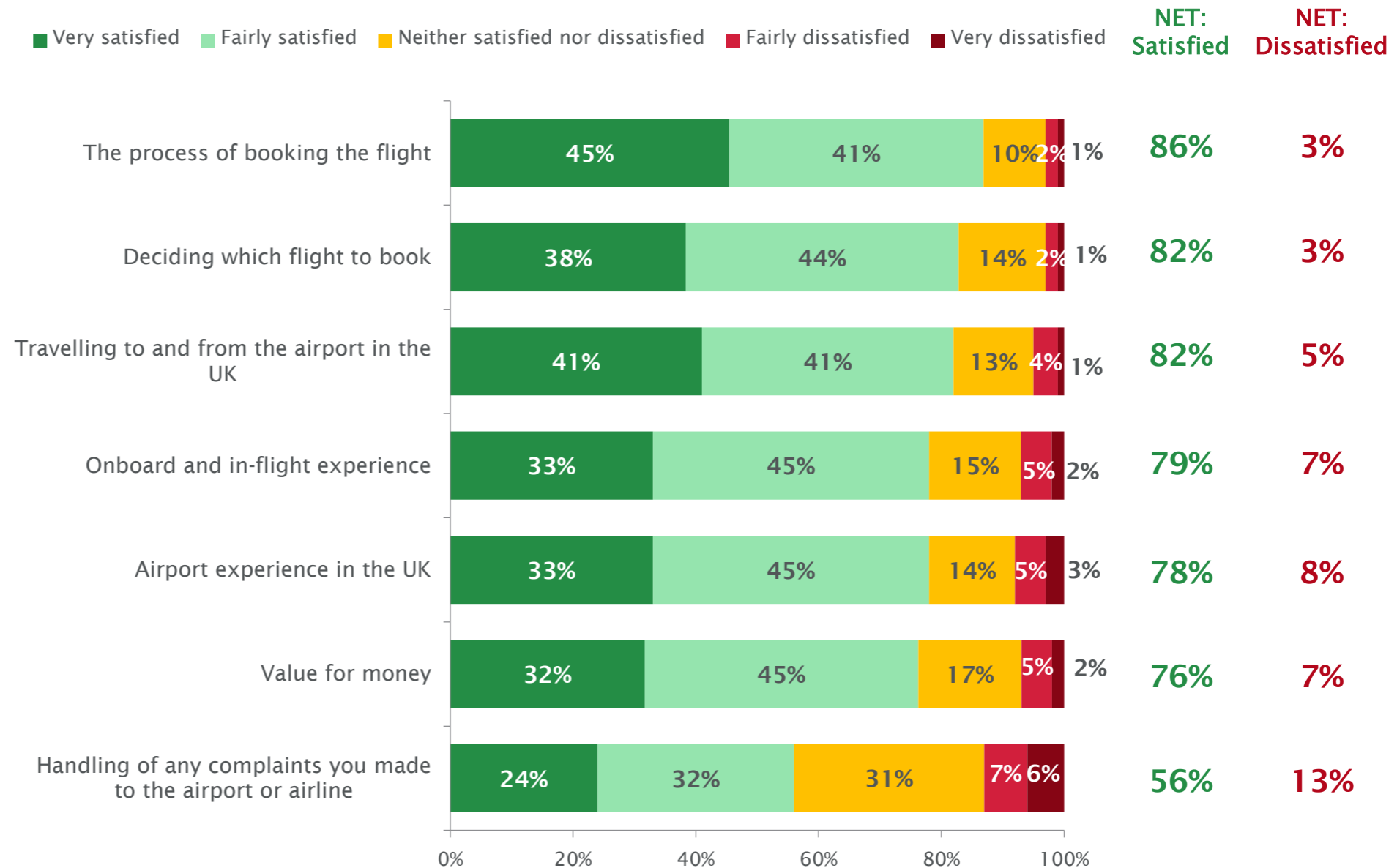
Recent flyers are still most likely to have been satisfied with the process of booking the flight, deciding which flight to book, or travelling to / from the airport in the UK

As in October 2018, a majority of recent flyers say they were satisfied with the different elements of their most recent flight, particularly the process of booking the flight (86%), travelling to and from the airport in the UK (82%), or deciding which flight to book (82%). Though the top 3 remain the same, their NET satisfaction scores have each dropped by 2 percentage points since Autumn 2018.

Similar to October 2018, recent flyers were least likely to be satisfied with the handling of any complaints they made to their airport or airline (56%). A third (31%) were neither satisfied nor dissatisfied while just over one in ten (13%) say they were dissatisfied with how their complaint was handled.



Last flight: Satisfaction with elements of the journey (UK bookings and airports) All those who have flown in the last 12 months, excluding 'Don't know' and 'Not applicable'



Q23. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight. How satisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=722-1784)



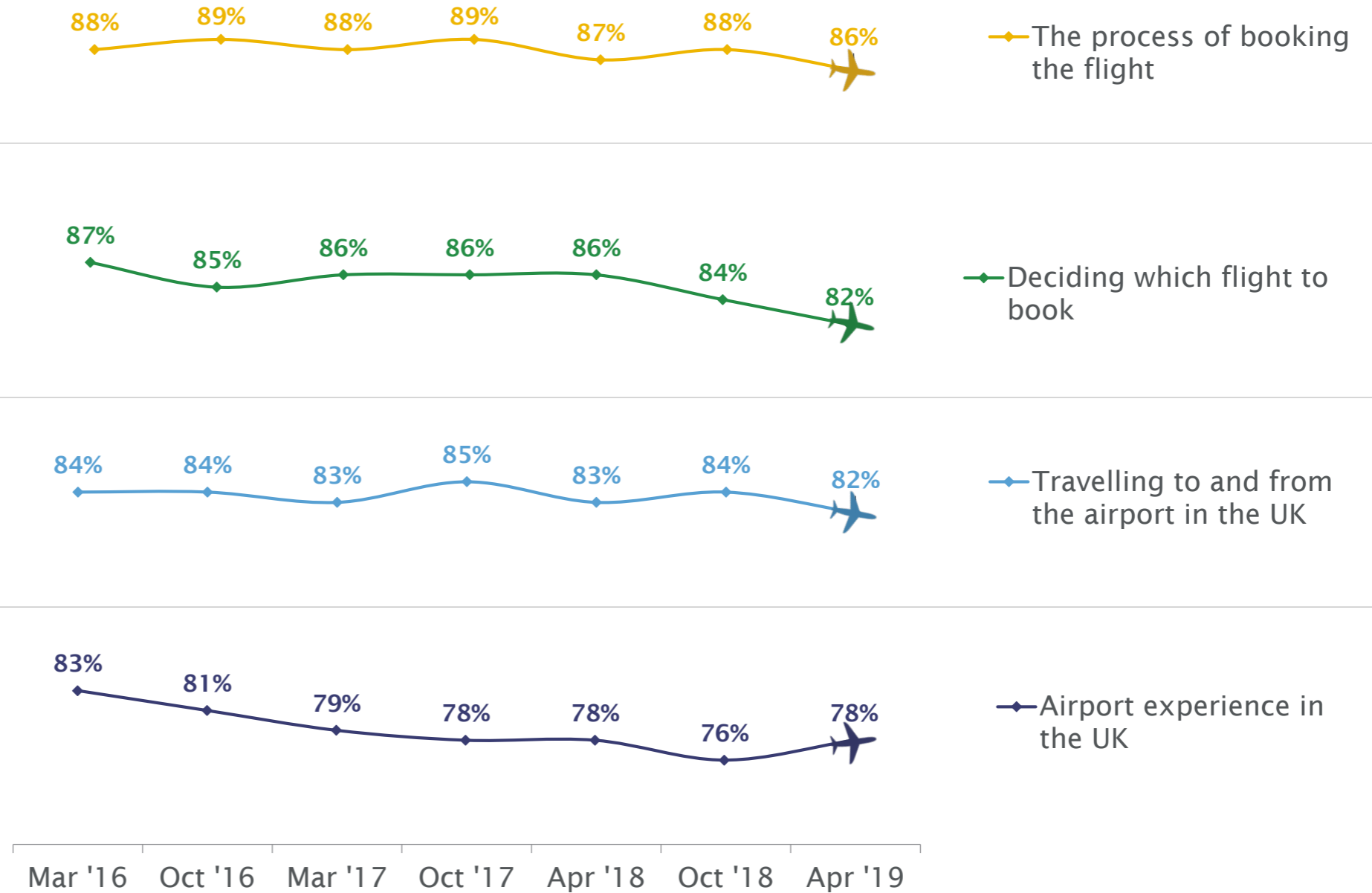
Last flight: Satisfaction with elements of the journey (UK bookings and airports) Demographic analysis

	Satisfied		Dissatisfied
The process of booking the flight	86%	▲ Age 55+ 92%	3% ▲ Age 18-34 7% ▲ East England 8%
Deciding which flight to book	82%		3% ▲ Age 18-34 6%
Travelling to and from the airport in the UK	82%	▲ Age 55+ 88%	5% ▲ Male 7%
Onboard and in-flight experience	79%	▲ North East 89%	7%
Airport experience in the UK	76%		8% ▲ Northern Ireland 17%
Value for money	76%	▲ North East 90%	7% ▲ Yorkshire and Humber 11%
Handling complaints made to the airport/airline	56%		13% ▲ Disabled passengers 18%

With the exception of the airport experience in the UK, levels of satisfaction with each area have continued to drop slightly since October 2018

- The proportion of recent flyers who say they were satisfied with the process of booking the flight (86%), deciding which flight to book (82%), or travelling to and from the airport in the UK (82%) is slightly lower than in the previous wave.
- The proportion who say they were satisfied with the airport experience in the UK has risen slightly since the previous wave (78% up from 76%).
- Although airport experience in the UK was the only factor to see a small increase, it is still below its March 2016 high of 83%.

Last flight: Satisfaction with elements of the journey – % Satisfied (Part 1)



During the booking process, some recent flyers found it difficult to understand baggage allowances or seating allocations

When asked if there was any information that proved hard to obtain or hard to understand, recent flyers most commonly mention one of two issues. First, information around baggage allowances – both in terms of the size of baggage that can be carried and the cost of doing so – appears to cause confusion for some. Second, the possibility of reserving a seat, or the cost of doing so, is also sometimes difficult to understand.



“Size of luggage we could carry onboard.”

“I could not easily understand/find out baggage allowance and charges on the site before actually going through the booking process.”

“Baggage entitlements for the different fare choices.”



“Cost of reserving a seat.”

“On the outward leg I was flying with a friend on a different booking. There seemed to be no way of linking the two bookings to ensure we sat together.”

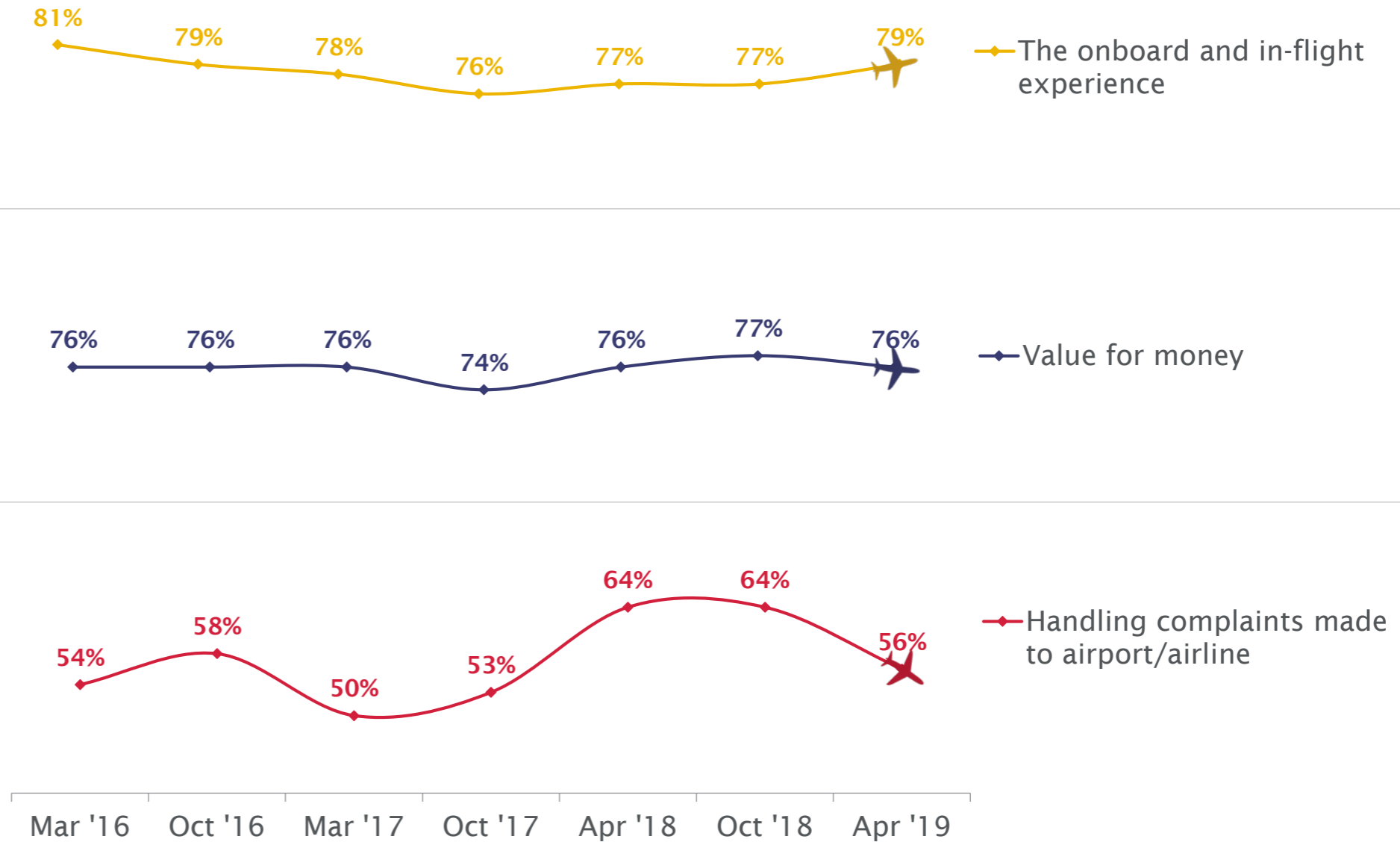
“Trying to book seats online was a problem - I get nervous during take off and wanted to make sure was sat next to my husband; but the website wouldn't let us book seats together.”

Satisfaction with complaints handling made to the airport/airline has dropped significantly

Satisfaction with the onboard and in-flight experience (79%) has increased slightly since Autumn 2018. Value for money (77%) remains in line with levels recorded in October 2018. However, satisfaction with handling of complaints has dropped from 64% to 56% since the previous wave.

This indicates a destabilisation of satisfaction levels with regards to complaint handling following a significant increase between October 2017 and April 2018.

Last flight: Satisfaction with elements of the journey – % Satisfied (Part 2)



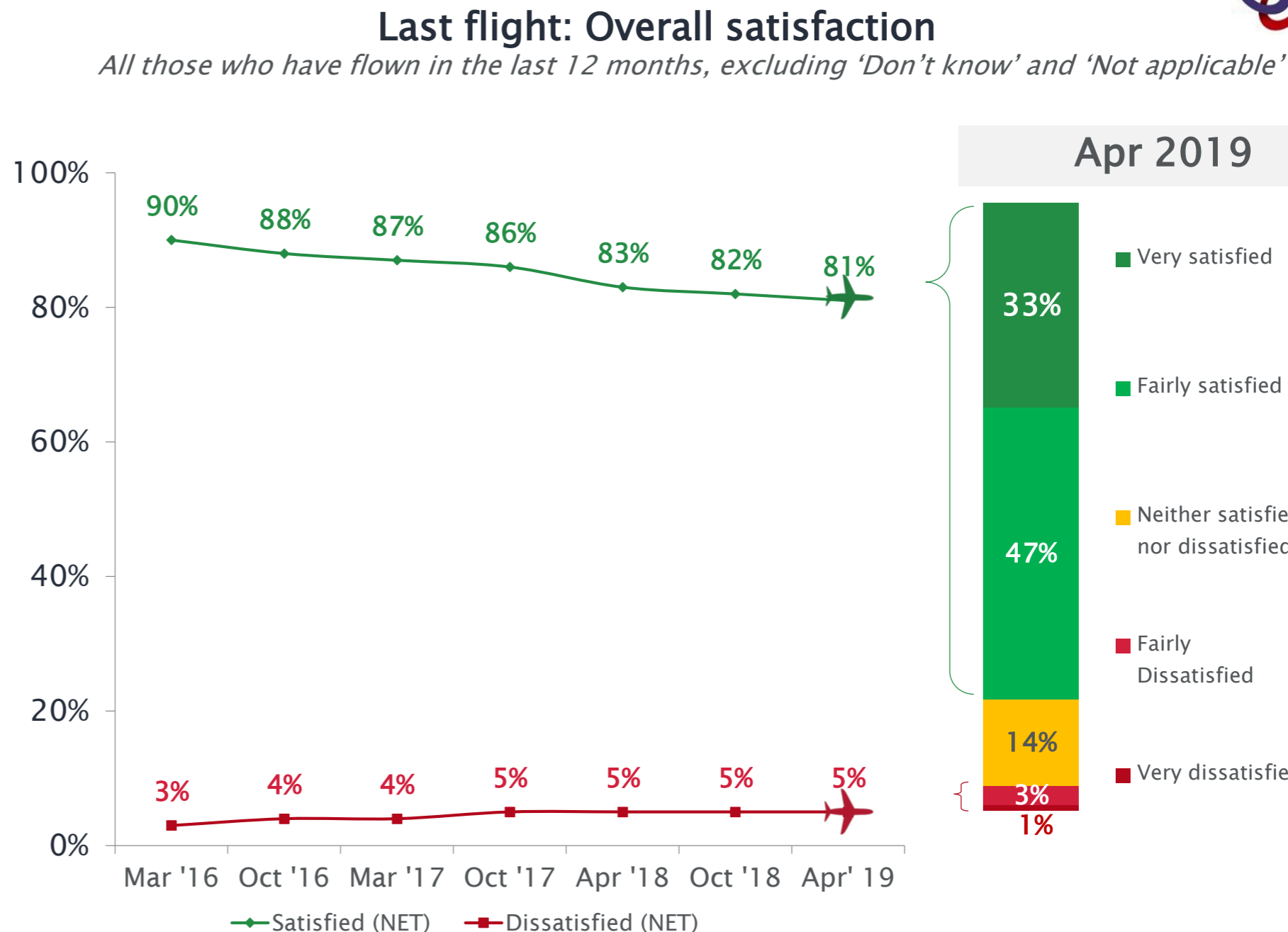
Q28. We'd now like to ask you how satisfied or dissatisfied you were with different aspects of your most recent flight. How satisfied were you with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=808-1908)



In line with Autumn 2018, four in five recent flyers say they were satisfied with the overall travel experience of their most recent flight

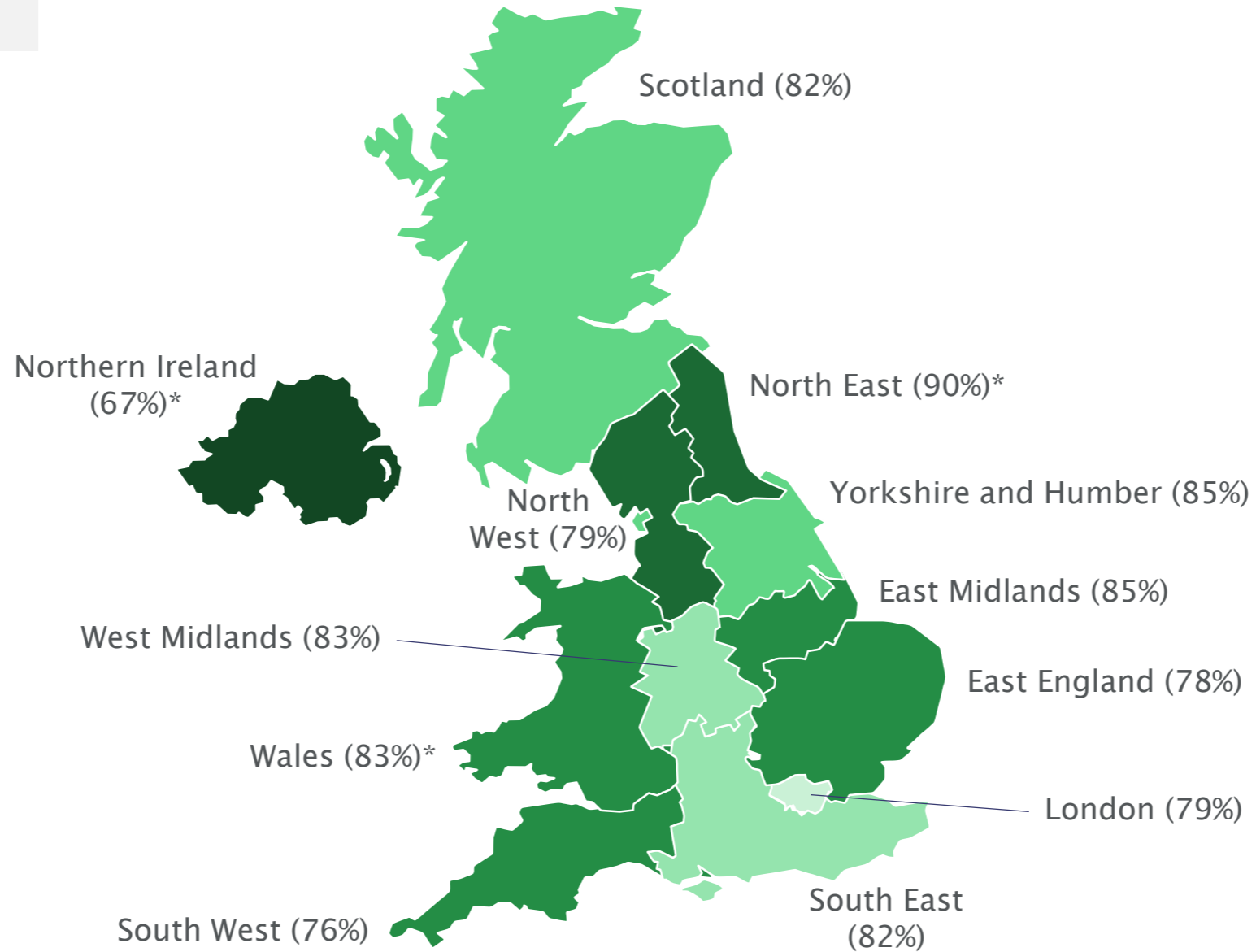
Four in five (81%) recent flyers say they were satisfied with the overall travel experience of their most recent flight, with a third saying they were very satisfied with this. Concurrently, only 5% say they were dissatisfied. This is unchanged from October 2018.

Satisfaction with the overall travel experience is in line with the previous wave of research (81% April 2019 vs. 82% in October 2018), although there has nevertheless been a steady decline since March 2016 (90%).



Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1785)

Last flight: Satisfaction with overall travel experience – Regional breakdown



Four in five recent flyers were satisfied with each aspect of the airport experience, particularly with navigating around and finding their way to the gate in the UK airport

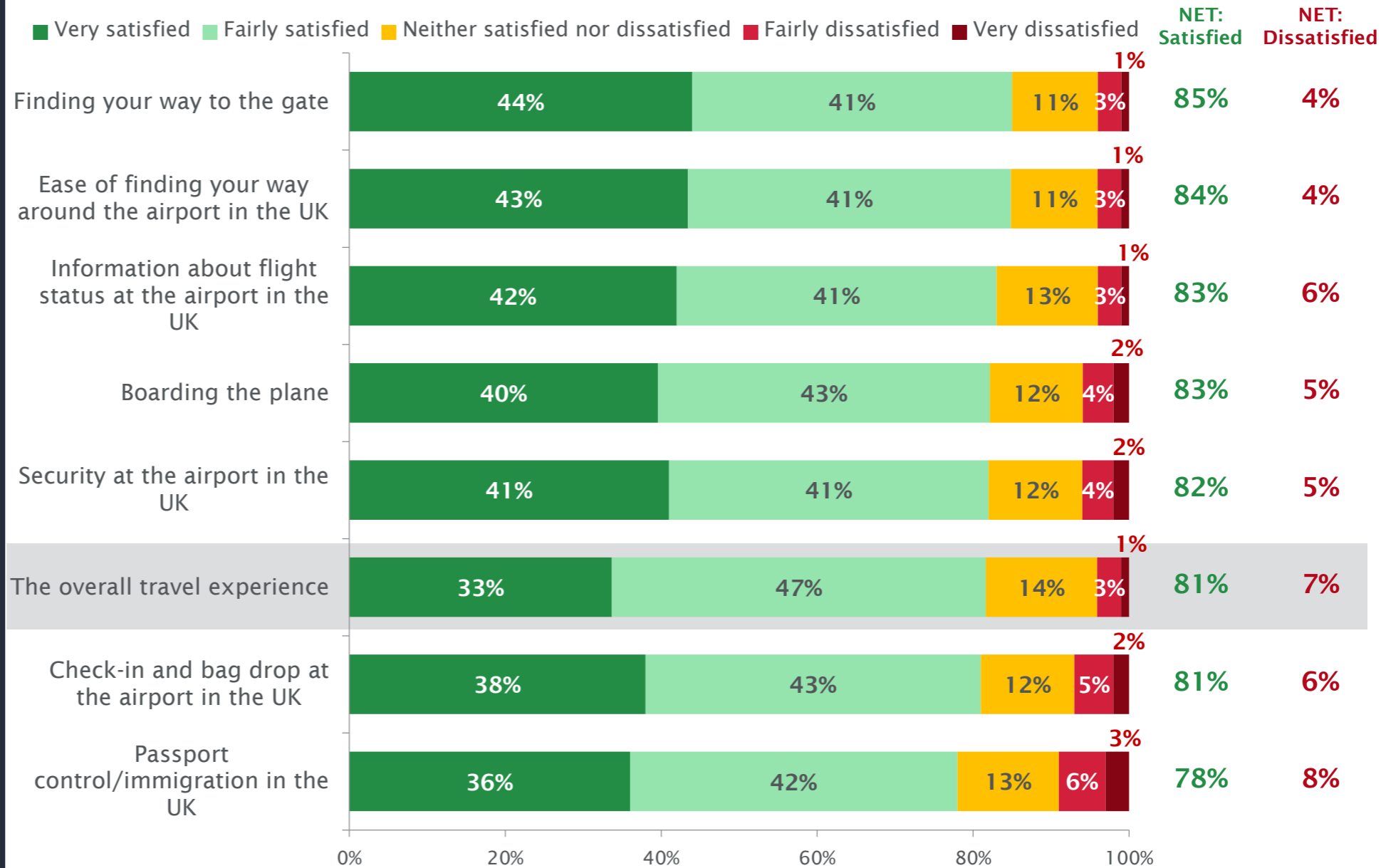
Recent flyers are most likely to have been satisfied with finding their way to the gate (85%), although at least four in five were also satisfied with aspects such as navigating around the airport (84%) or boarding the plane (80%).

As in October 2018, those aged 55+ are significantly more likely than their younger counterparts to be satisfied with most of the different elements tested. This is most pronounced regarding information about the flight status at the airport in the UK (90% 55+ vs. 77% 18–34) and boarding the plane (88% 55+ vs. 76% 18–34).

Last flight: Satisfaction with airport experience (UK) – Part 1



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



Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1578-1785)

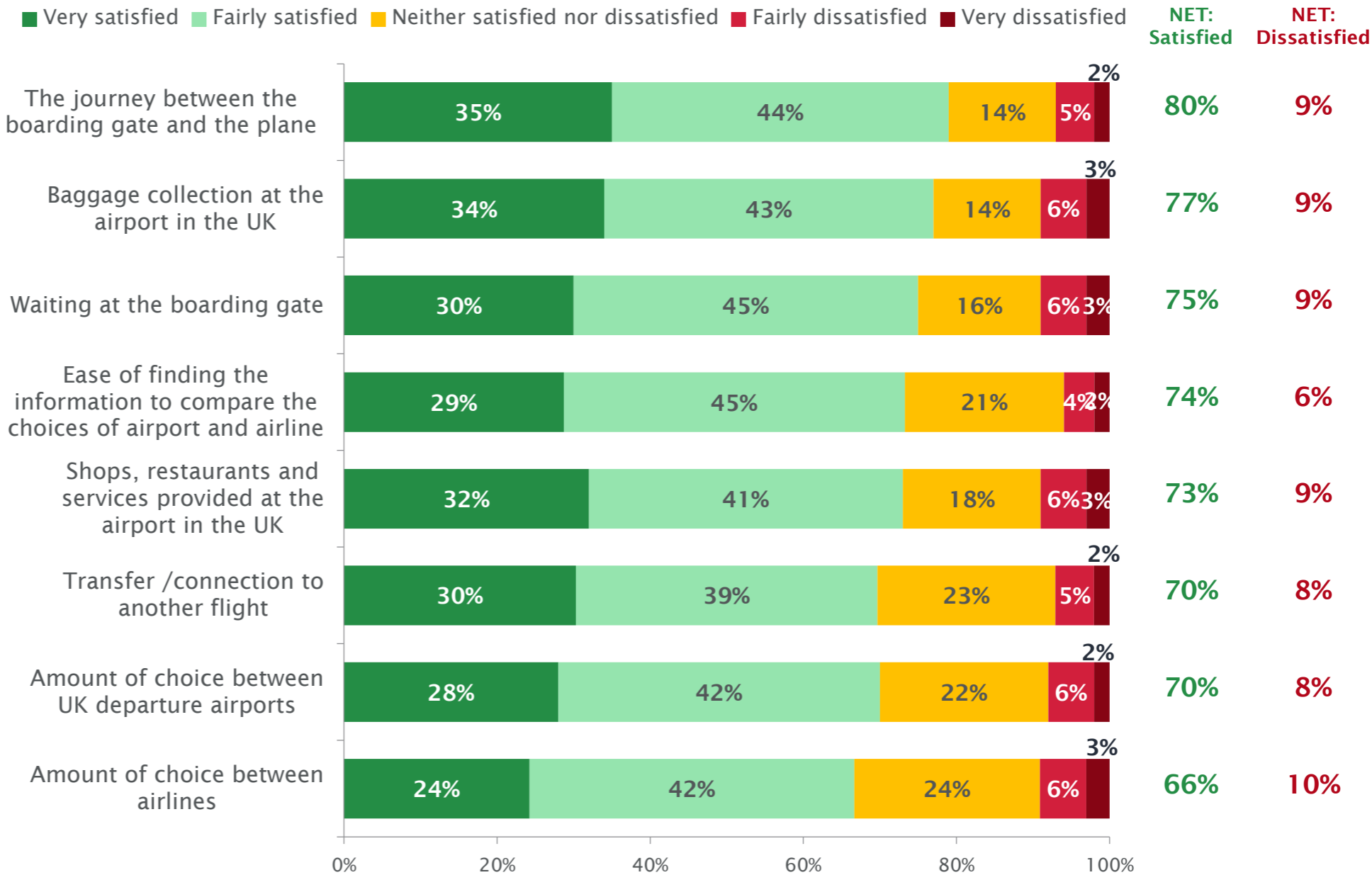
Recent passengers are least likely to have been satisfied with the amount of choice between airlines for their most recent flight or the choice between UK departure airports

At least two thirds of passengers were satisfied with the remaining elements of their most recent journey. They are least likely to have been satisfied with the amount of choice between airlines (66%) and one in ten were dissatisfied with this (10%). Dissatisfaction with the other elements is relatively low.

Last flight: Satisfaction with airport experience (UK) – Part 2



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



Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=875-1777)



**Last flight:
Satisfaction
with airport
experience (UK)
– Demographic
analysis**

	Satisfied		Dissatisfied	
Finding your way to the gate	85%	▲ Age 55+ 91%	▲ Non-disabled passenger 87%	4%
Ease of finding your way around the airport	84%	▲ Age 55+ 88%		5%
Information about flight status	84%	▲ Age 55+ 90%		4%
Boarding the plane	83%	▲ Age 55+ 88%	▲ North East 90%*	6% ▲ Age 18–34 9%
Security at the airport	82%	▲ South East 87%		6%
Check-in and bag drop	81%	▲ Scotland 88%		6%
The overall travel experience	81%	▲ Age 55+ 84%		5%
The journey between the boarding gate and plane	80%	▲ Age 55+ 84%		7%
Passport control / immigration	78%	▲ Age 55+ 83%	▲ North East 89%*	9%
Baggage collection at the airport	77%			9%
Waiting at the boarding gate	75%			9%
Ease of finding the information to compare the choices of airport and airline	74%			6% ▲ Yorkshire and Humber 14%
Shops, restaurants and services at the airport	73%			9% ▲ Age 18–34 11%
Transfer/connection to another flight	70%			8%
Amount of choice between UK departure airports	70%			8% ▲ East England 11%*
Amount of choice between airlines	66%			10%

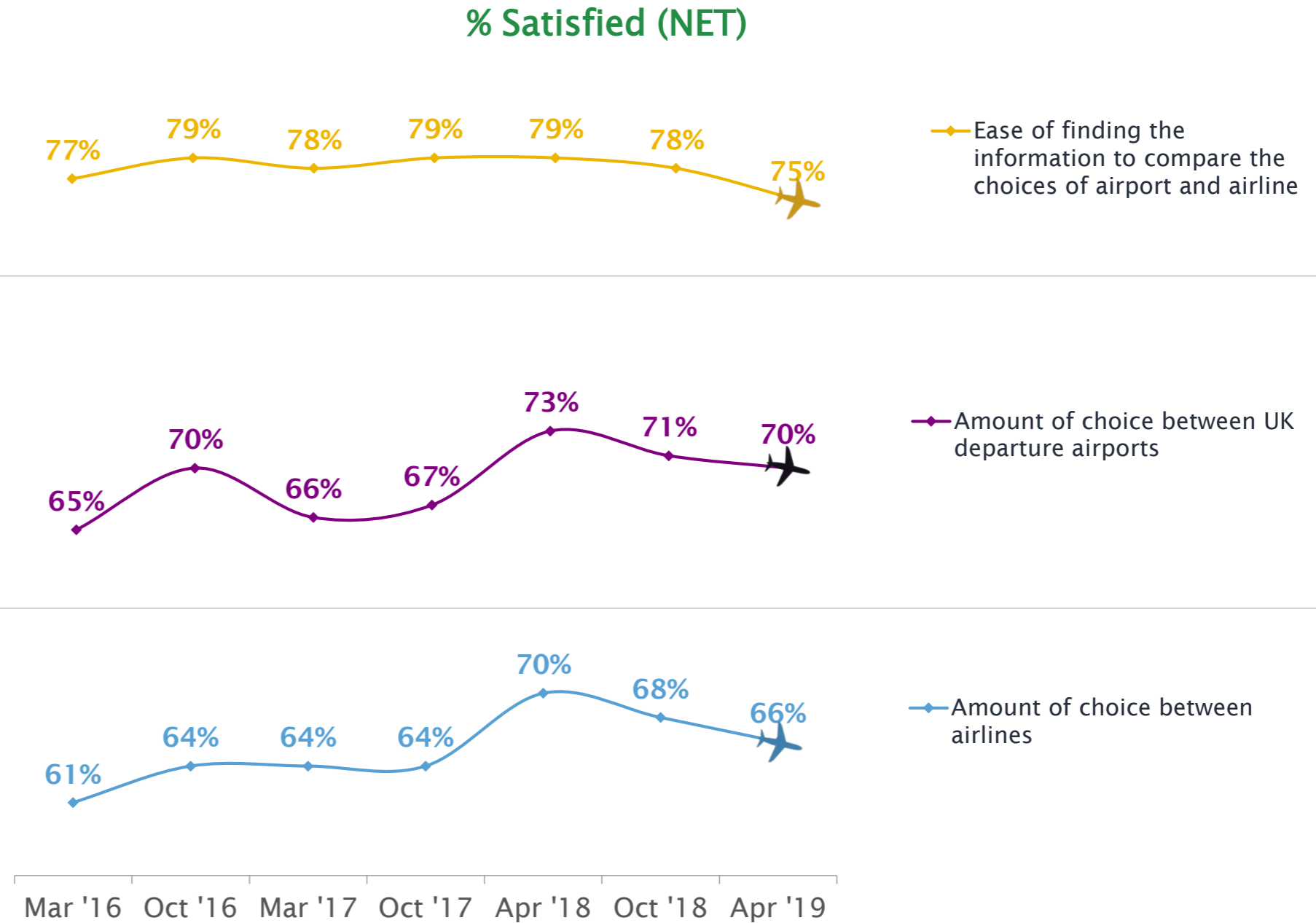
Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=875–1785)

Levels of satisfaction with each element of the pre-booking process are broadly consistent with the previous wave

As in each wave since March 2016, around eight in ten passengers say they were satisfied with the ease of finding the information to compare the choices of airport and airline. This has dropped slightly from a high of 79% in April 2018 to 75% in April 2019.

Seven in ten say there were satisfied with the amount of choice between UK departure airports (70%) or the amount of choice between airlines (66%). This is slightly lower than the highest satisfaction levels recorded in April 2018 (73% and 70% respectively).

Last flight: Satisfaction with elements of pre-booking



Q24. Thinking now about some more specific aspects of your most recent flight, please tell us how satisfied or dissatisfied you were with the following elements? Base: All who have flown in the last 12 months, excluding DK and NA responses (n=1628-1645)

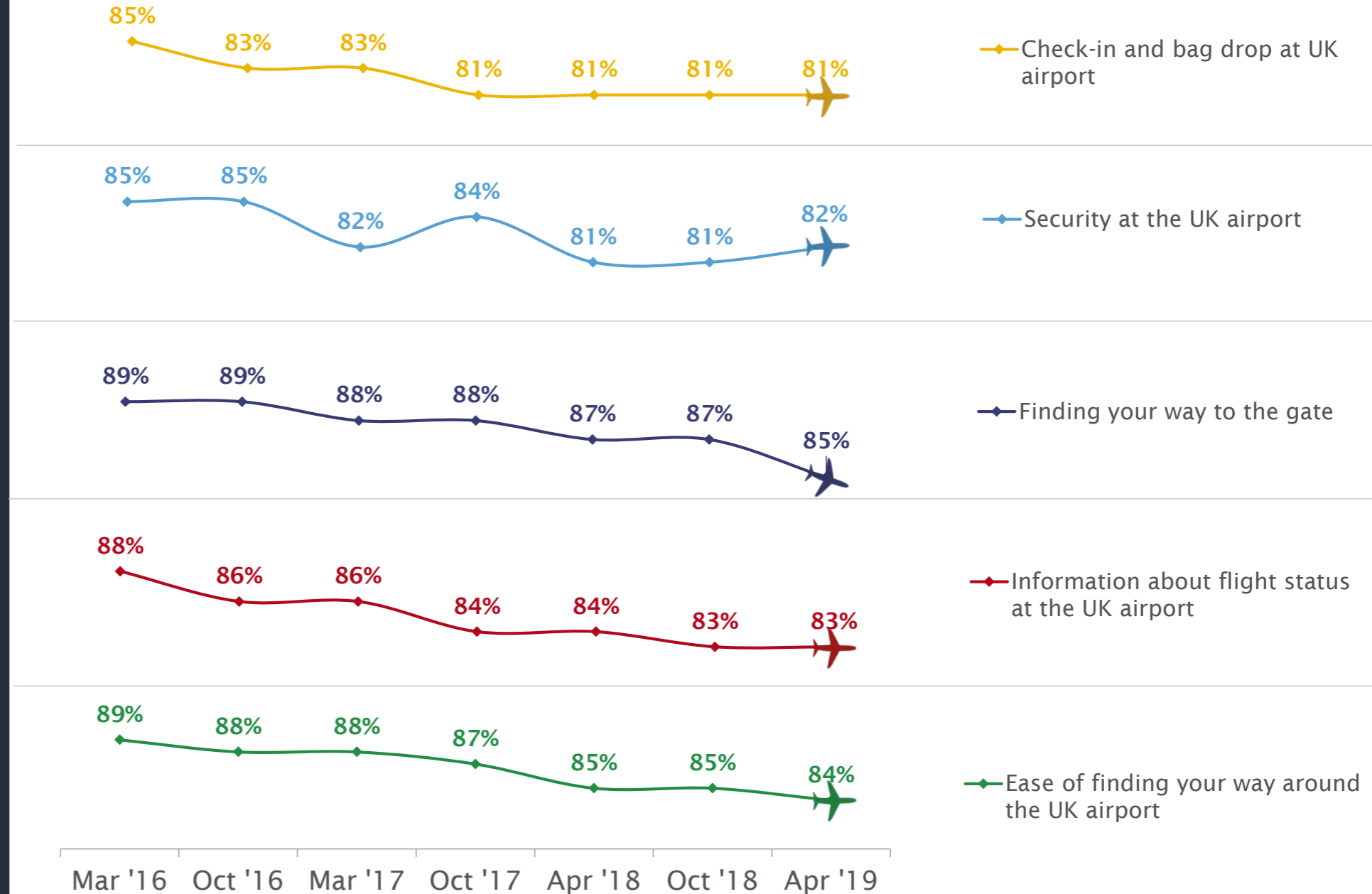
Changes in levels of satisfaction with check-in and bag drop, information about flight status, and security at the UK airport have levelled off since October 2018

Recent flyers' satisfaction with each area of the UK airport experience is consistent with the levels recorded in October 2018. Nevertheless, satisfaction levels have seen a shallow decline in most areas since March 2016, particularly regarding finding your way to the gate (85% Apr '19 vs. 89% Mar '16), information about flight status (83% vs. 88%) or the ease of finding their way around the UK airport (84% vs. 89%).

Last flight: Satisfaction with airport experience - Part 1



% Satisfied (NET)



Satisfaction with transfers / connections to another flight, shops restaurants and services and passport control have declined – though baggage collection continues unchanged since October 2018

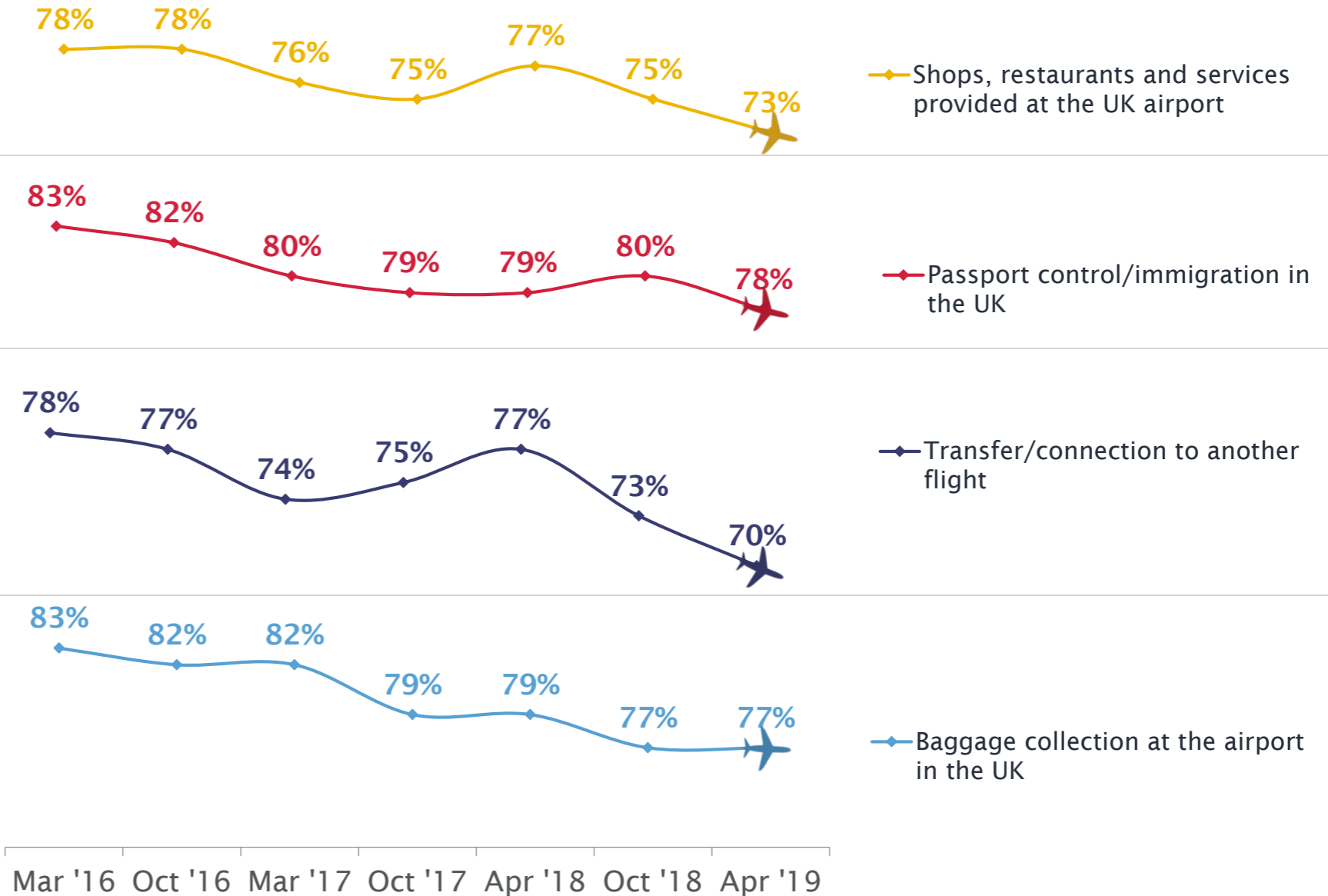
Levels of satisfaction with shops, restaurants and services provided at the UK airport (73%) or with passport control / immigration (78%) has seen a small decline compared to the previous wave of research, and since March 2016.

Satisfaction with transfers / connections to another flight has decreased compared to the same time last year (70% Spring 2019 vs. 77% Spring 2018). Conversely, levels of satisfaction with baggage collection at the airport in the UK have seen no change since the previous wave but have dropped since tracking began (77% Spring 2019 vs. 83% Spring 2016).

Last flight: Satisfaction with airport experience – Part 2

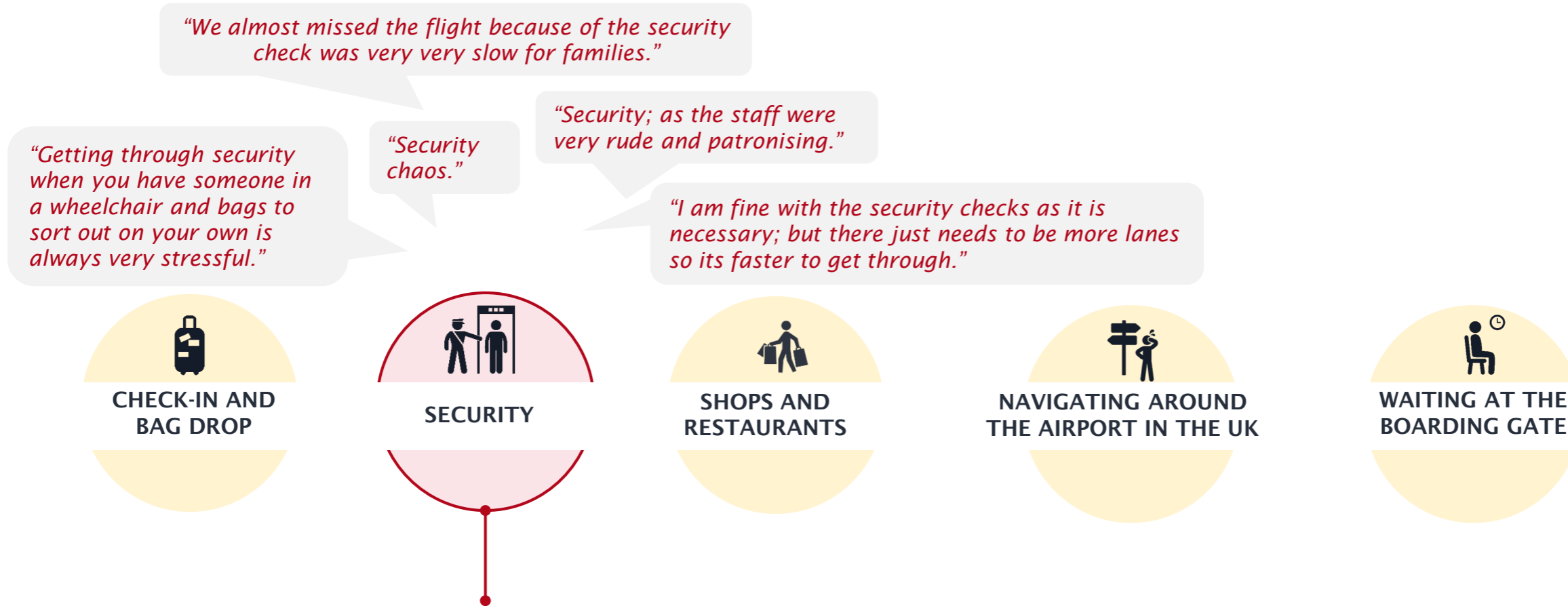


% Satisfied (NET)





Prior to flying, problems at security are cited by recent flyers as an aspect that was particularly stressful

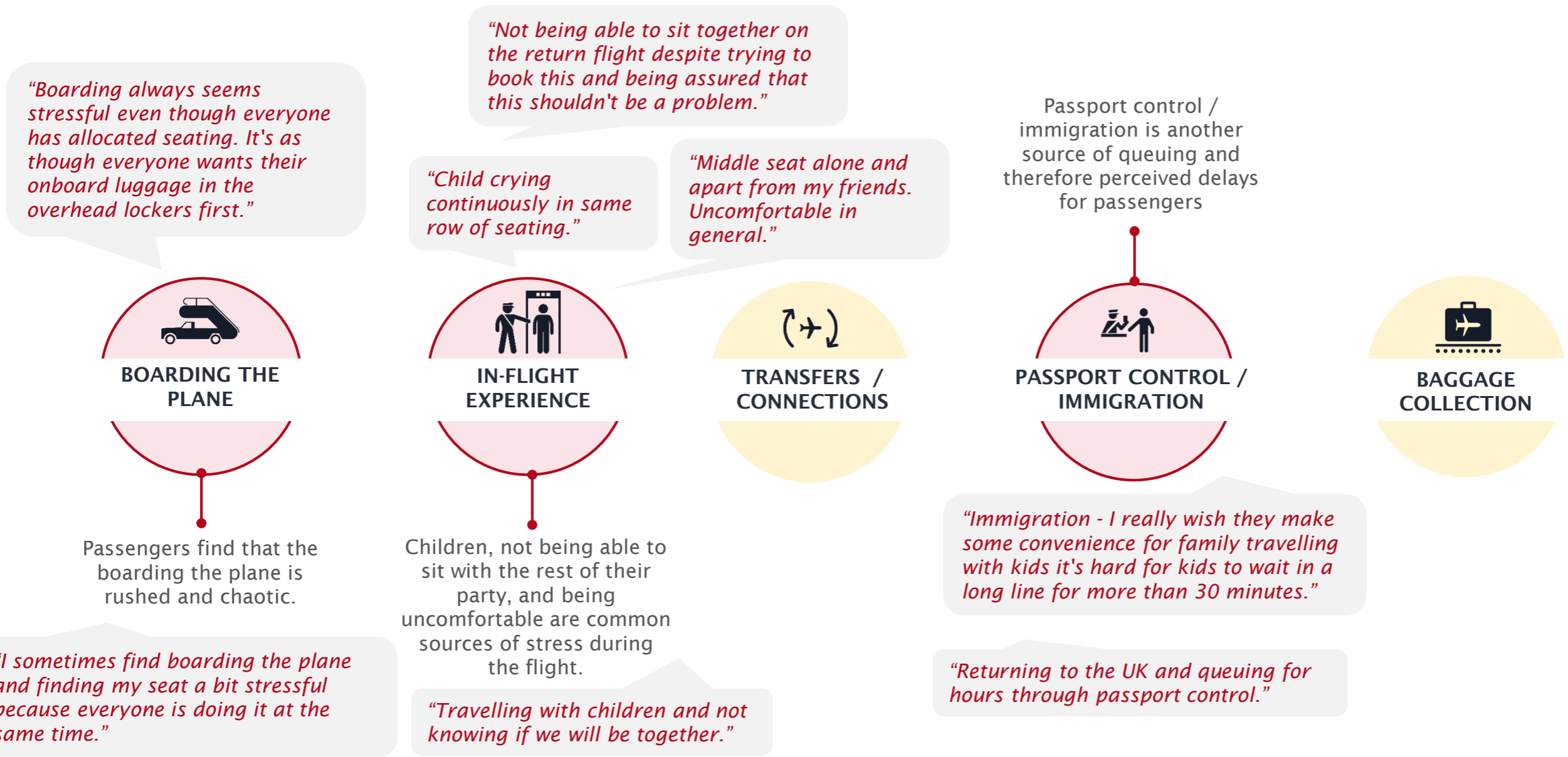


Security is often the first point at which recent flyers encountered a delay to their journey. In particular, queues, the length of time it takes and specific difficulties for disabled passengers or those with children were mentioned. Some recent passengers were concerned that delays at security would mean that they would miss their flight.

Q27. Were there any aspects of your last flight that you found particularly stressful? If so, what were they?

Q28. Why was it that you found those things particularly stressful? Base: All who have flown from a UK airport in the last 12 months (n=1812)

From boarding the plane onwards there are then multiple points in the flying experience that recent flyers find stressful



Q27. Were there any aspects of your last flight that you found particularly stressful? If so, what were they?

Q28. Why was it that you found those things particularly stressful? Base: All who have flown from a UK airport in the last 12 months (n=1812)



Section 4

Travel Disruption and complaint handling

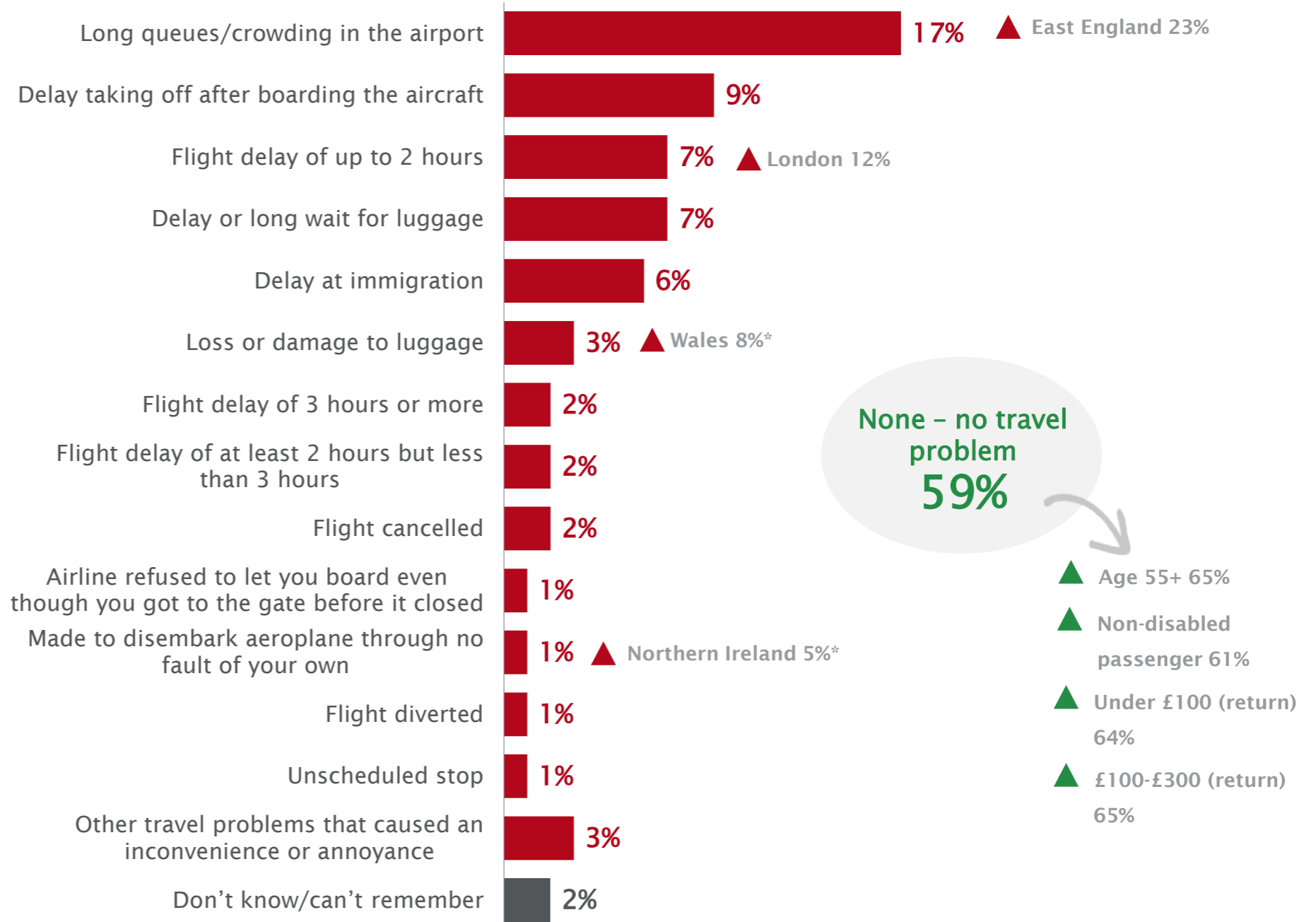
As in the previous wave, long queues/crowding in the airport remains the most commonly experienced travel issue

As in Autumn 2018, the travel issue most commonly experienced among recent flyers remains long queues/crowding in the airport (17% vs. 20% Autumn 2018). Other common issues are less prevalent than in the previous wave, including a delay taking off after boarding the aircraft (9% vs. 13% Autumn 2018) or a flight delay of up to 2 hours (7% vs. 12% Autumn 2018).

Three in five recent flyers say they did not experience any travel problems (59%), up from half (50%) in the previous wave and returning to levels seen in Spring 2018 (56%).

Experience of recent flight issue(s)

All who have flown in the last 12 months



Q33. During this most recent journey, did you experience any of the following issues? Please count onward and return flights and any transfers as one journey. Base: All those who have flown in the last 12 months (n=1821)

Half of recent flyers who experienced travel issues received information on the cause of the problem, most commonly from the airline

Half (49%) of recent flyers who experienced any travel issue say they received information on the cause of the issue(s), slightly lower than the proportion who said the same in Autumn 2018 (54%). A similar proportion (46%) say they did not receive any information.

More than half of those who were informed say they received information from the airline itself (55%), while two in five say they were informed by the airport (40%).

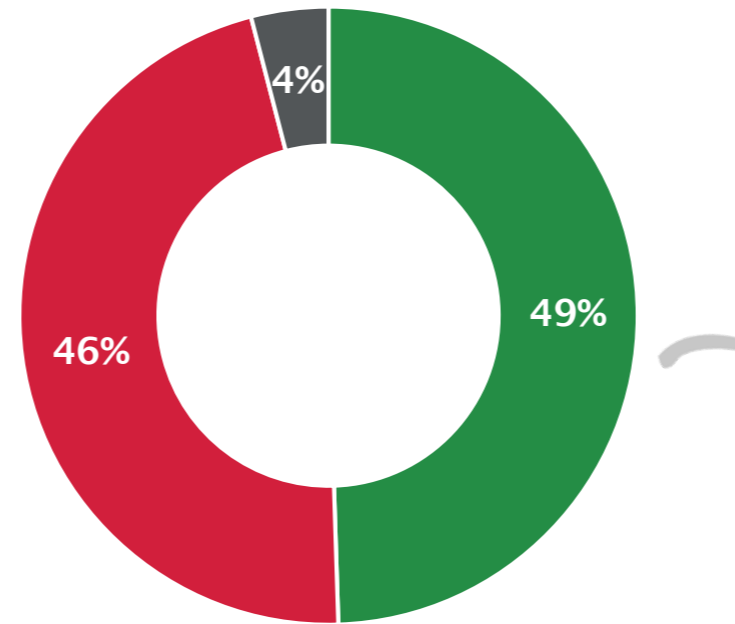
Older adults are more than twice as likely as their younger counterparts to say they received no information on the cause of the issue they experienced (63% 55+ vs. 29% 18-34).



Receiving information on travel issues

Receiving information on the cause of the issue(s)

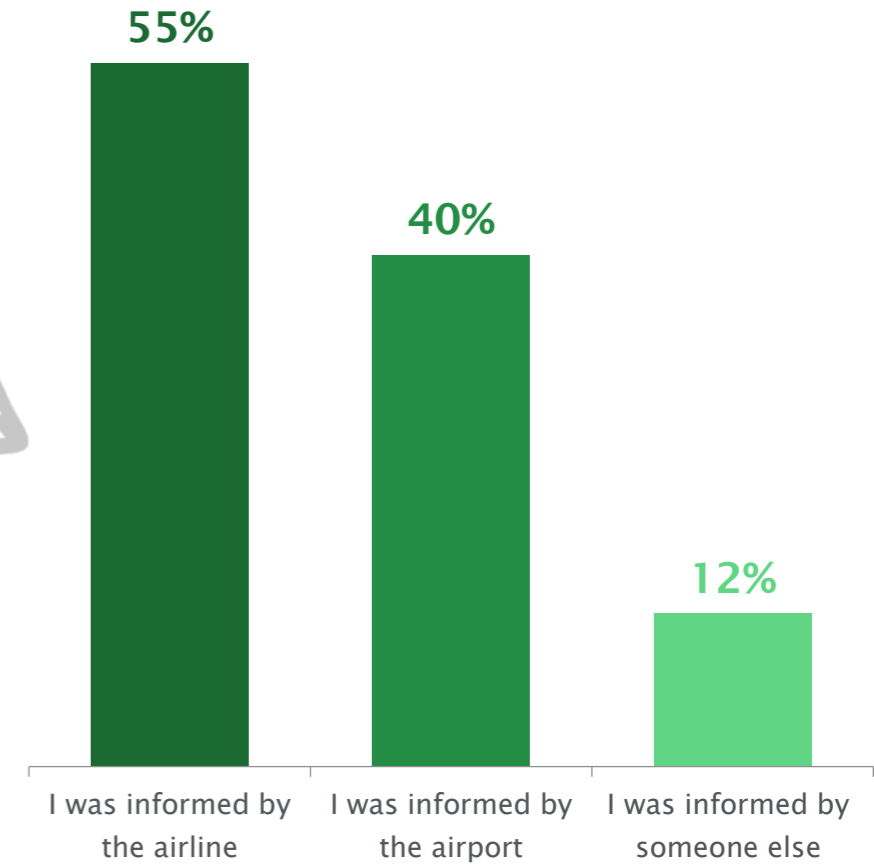
All who have flown in the last 12 months and experienced travel issue(s)



■ NET: Yes ■ No ■ Don't know / can't remember

Source of information

All who have flown in the last 12 months and experienced travel issue(s) and received information



Q34. Were you informed of the cause of the issue(s) you experienced on your most recent journey? Please count outward and return flights and any transfers as one journey. Base: All who have flown in the last 12 months and experienced travel issues (n=712) Base: All who have flown in the last 12 months and experienced a travel problem excluding 'No' and 'Don't know / can't remember' responses (n=349)

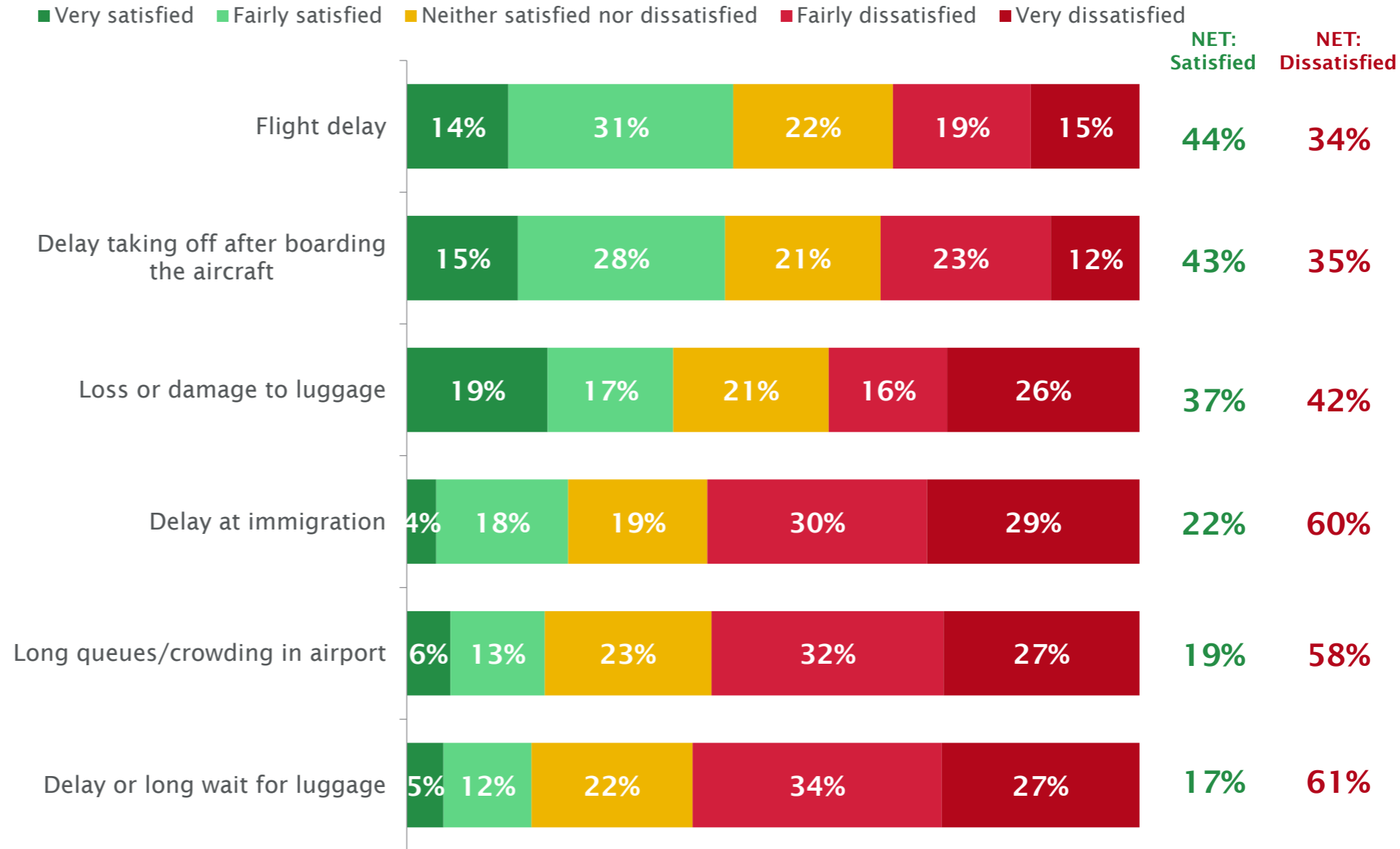
Satisfaction with the handling of the most common travel issues remains low, especially those relating to delays or crowding in the airport

Recent flyers are most likely to be satisfied with how a flight delay (44%) or a delay taking off after boarding the aircraft (43%) was dealt with, although a third say they were dissatisfied (34% and 35% respectively). This is broadly in line with the previous wave of research.

On the other hand, recent flyers are most likely to be dissatisfied with how delays within their airport are dealt with, namely a delay or long wait for luggage (61%), delays at immigration (60%) or long queues / crowding in the airport (58%). Further to this, at least a quarter (27%–29%) say they were very dissatisfied with how these travel issues were handled.

Satisfaction with how each travel issue was handled

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



Showing bases n=50+

Q35. How satisfied or dissatisfied were you with the way your travel issue was handled overall / with the way each of the following travel issues were handled overall? Base: All who have flown in the last 12 months and experienced travel issues excluding 'Don't know' responses (n=56-299)

Poor communication is the single most common reason for being dissatisfied with how a flight issue was handled

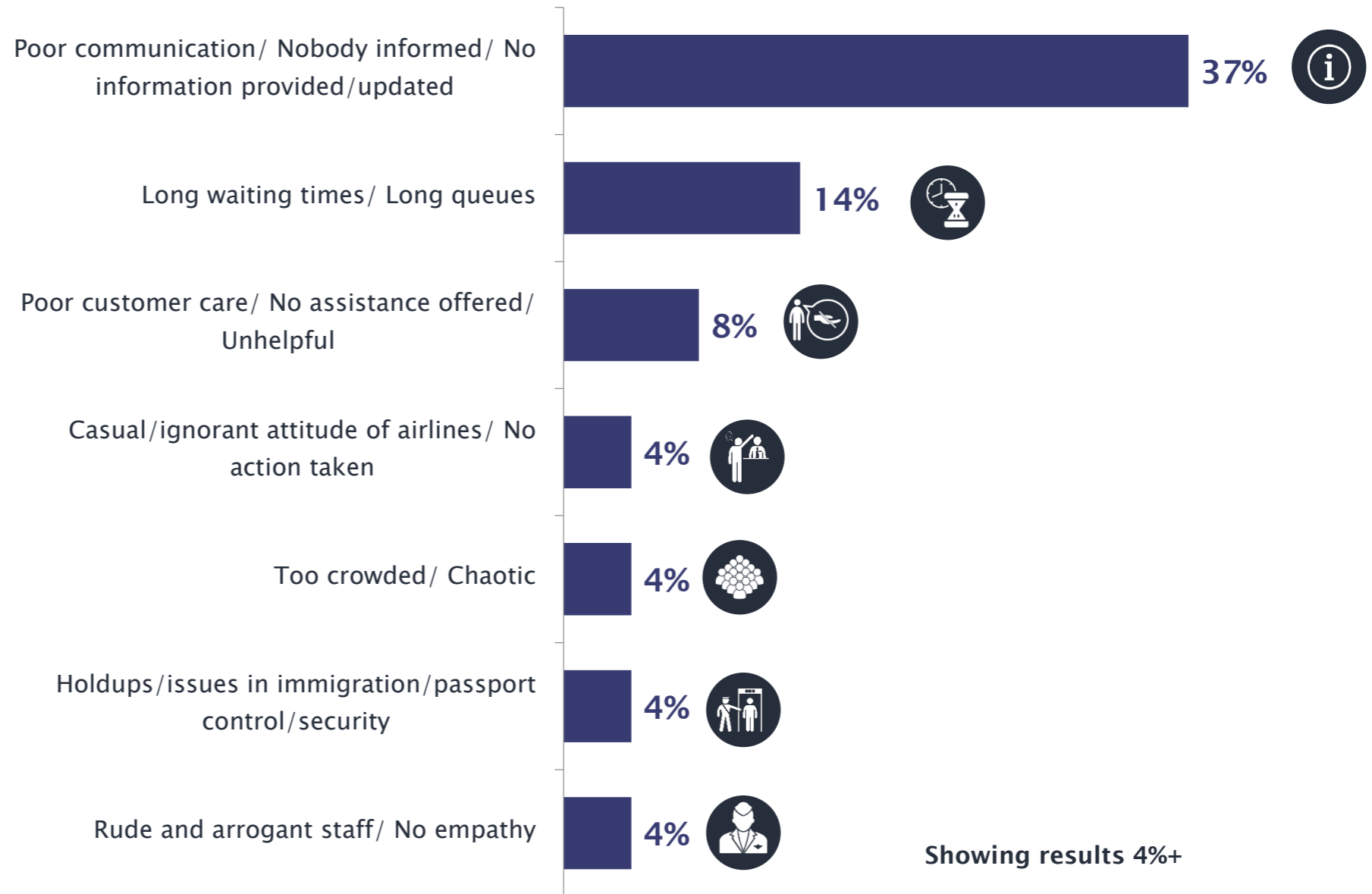
When asked about why they were dissatisfied with the way their flight issue(s) were handled, passengers are most likely to refer to poor communication/insufficient information (37%) above all, up from 31% in October 2018.

Following this, 14% say they were dissatisfied because of long waiting times / queues and 8% say this was because of poor customer care.

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



All who have flown in the last 12 months, experienced a travel issue(s) and were dissatisfied with the outcome



Q36. Why were you dissatisfied with the way your flight issue was / flight issues were handled? Base: All who have flown in the last 12 months, experienced a travel problem, and were NET: Dissatisfied with the outcome (n=318). N.B. Chart excludes code 'flight delays/cancellations'.

In line with how they feel each type of flight issue was handled, levels of satisfaction with the steps taken to address an issue are also relatively low

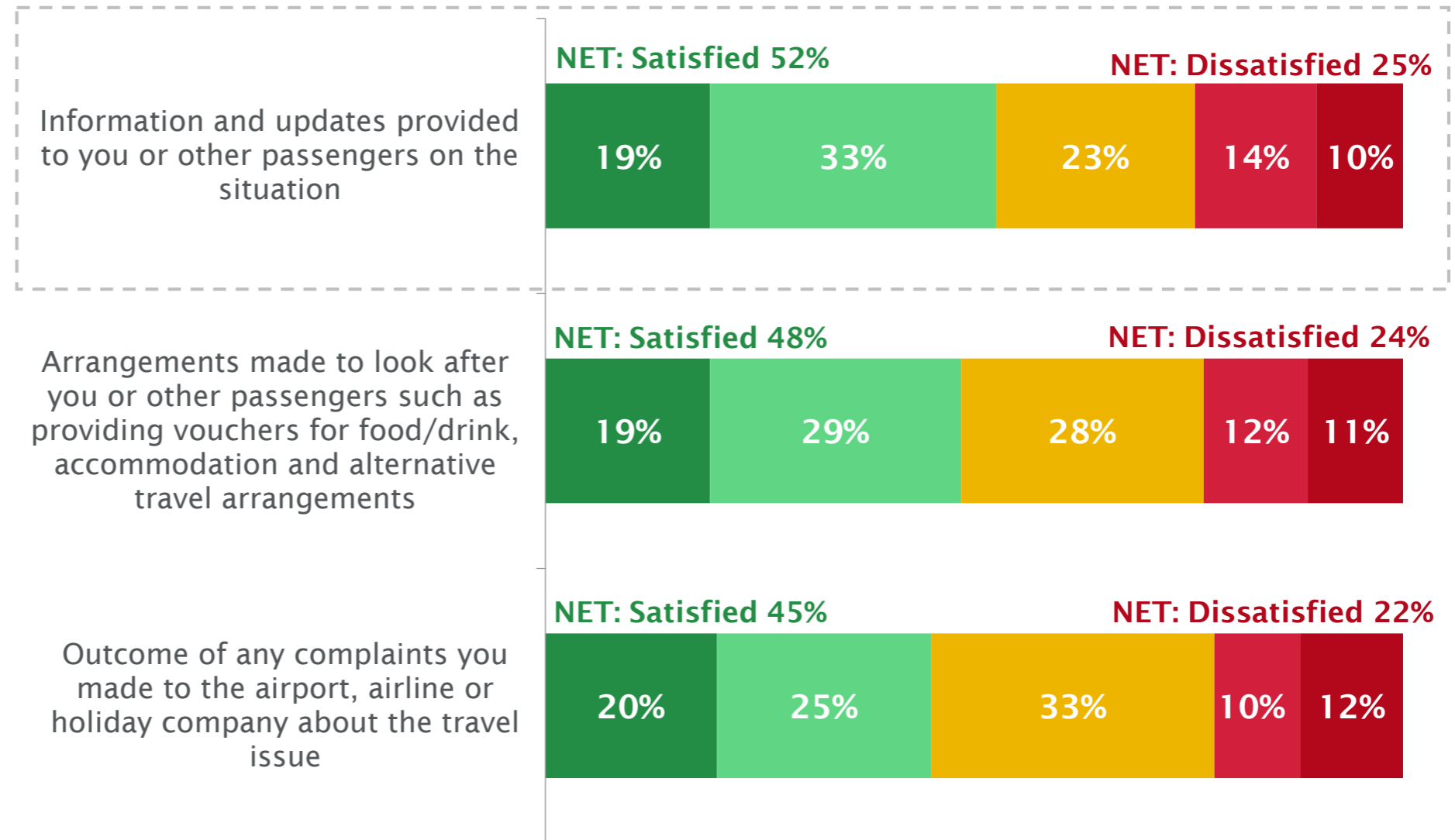
Around half of recent flyers who experienced a travel issue were satisfied with the information and updates provided (52%), arrangements made to look after them or other passengers (48%), or the outcome of any complaints they made (45%). Nevertheless, a significant minority were dissatisfied with each of these aspects (22–25%).

Satisfaction with the different aspects of flight issue(s)

All who have flown in the last 12 months and experienced a travel problem



■ Very satisfied
 ■ Fairly satisfied
 ■ Neither satisfied nor dissatisfied
 ■ Fairly dissatisfied
 ■ Very dissatisfied



Q37. How satisfied or dissatisfied were you with each of the following aspects in terms of your flight issue(s)? Please select one answer for each statement. Base: All who have flown in last 12 months and experienced a travel problem, excluding 'Don't know' and 'Not applicable/Not required' responses (n=346-627)

Recent flyers are more likely to be satisfied than dissatisfied with how their travel complaint was handled, although satisfaction has decreased since Autumn 2018

At least two in five say they were satisfied with each aspect of how their travel complaint was handled (43%–50%), with recent flyers most likely to be satisfied with how fairly they were treated (50%) or how helpful and friendly the people dealing with their complaint were (50%).

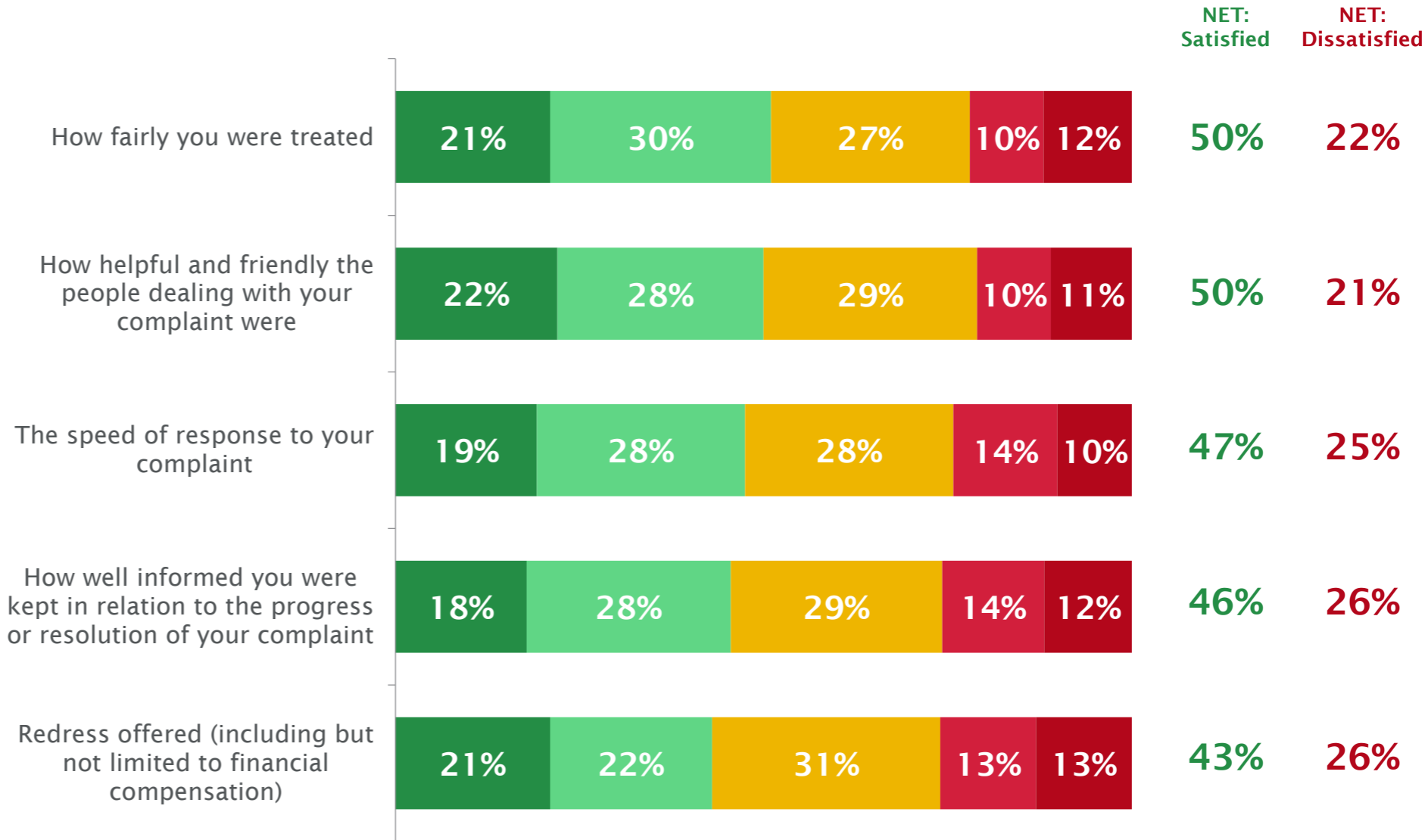
Nevertheless, levels of satisfaction with complaint handling have generally decreased. Most notably, the proportion who say they were satisfied with how well informed they were kept with the progress and resolution of their complaint has decreased by 10 percentage points (46% April '19 vs. 56% October '18). Similarly, satisfaction with how helpful and friendly the people dealing with the complaint were has decreased by 8 percentage points (50% April '19 vs. 58% October '18). This is driven both by an increase in levels of dissatisfaction and in neutrality in equal measure.



Satisfaction with how complaints were handled

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

Very satisfied Fairly satisfied Neither satisfied nor dissatisfied Fairly dissatisfied Very dissatisfied



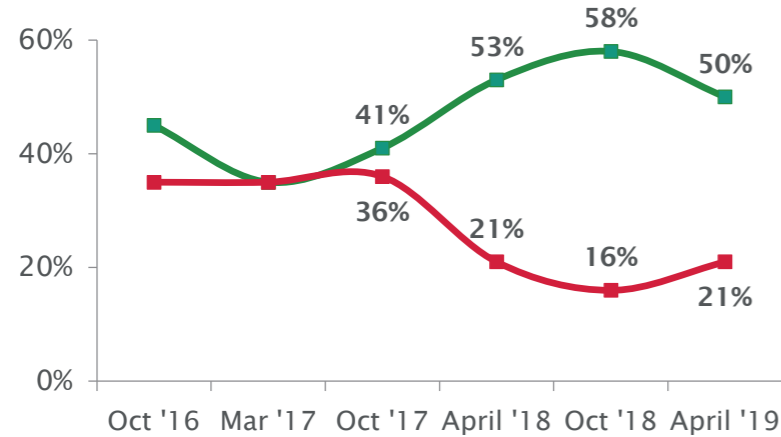
Q38. Thinking more specifically about any complaints you made to the airport, airline or holiday company about the travel issue, how satisfied or dissatisfied were you with each of the following aspects? Base: All who have flown in the last 12 months and made a complaint about a travel issue(s) excluding 'Too early to say' and 'Don't know' responses (n=296-320)

Satisfaction rates on each area of complaint handling have tended to decrease compared to the previous wave of research

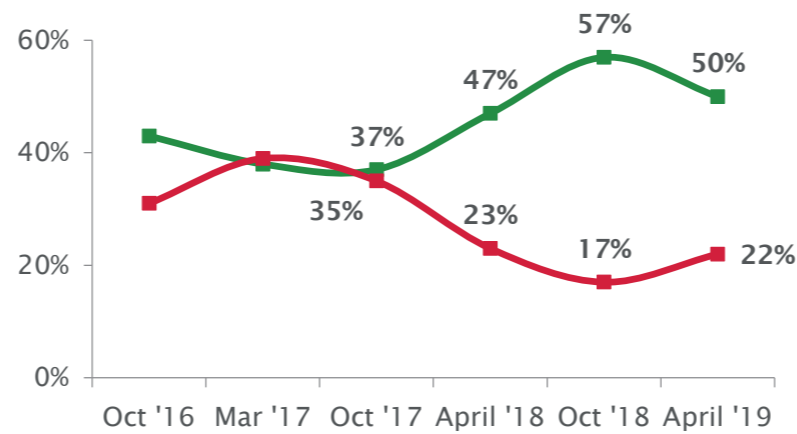


Satisfaction with complaint handling – Tracking

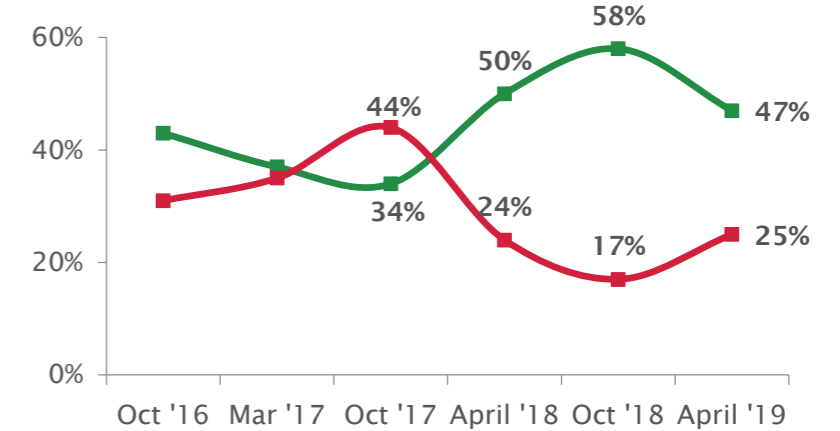
Helpfulness and friendliness of people dealing with complaint



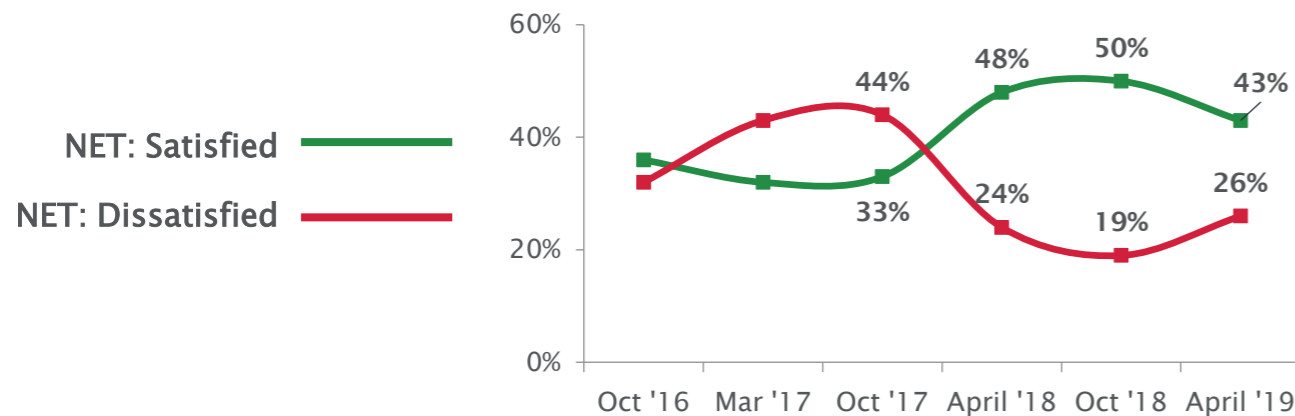
How fairly you were treated



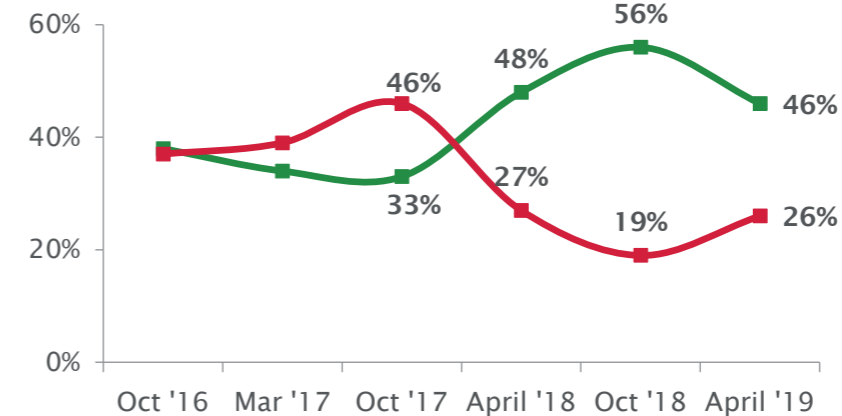
The speed of response to your complaint



Redress offered



Kept well informed about progress or resolution





Section 5

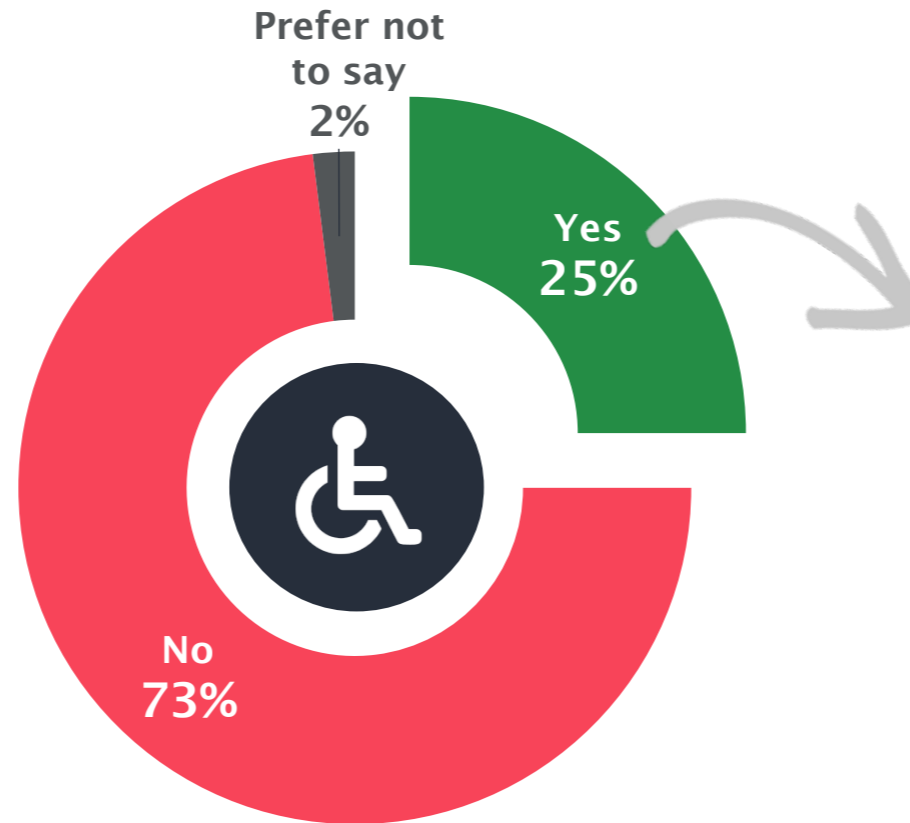
Accessibility and the experience of disabled passengers



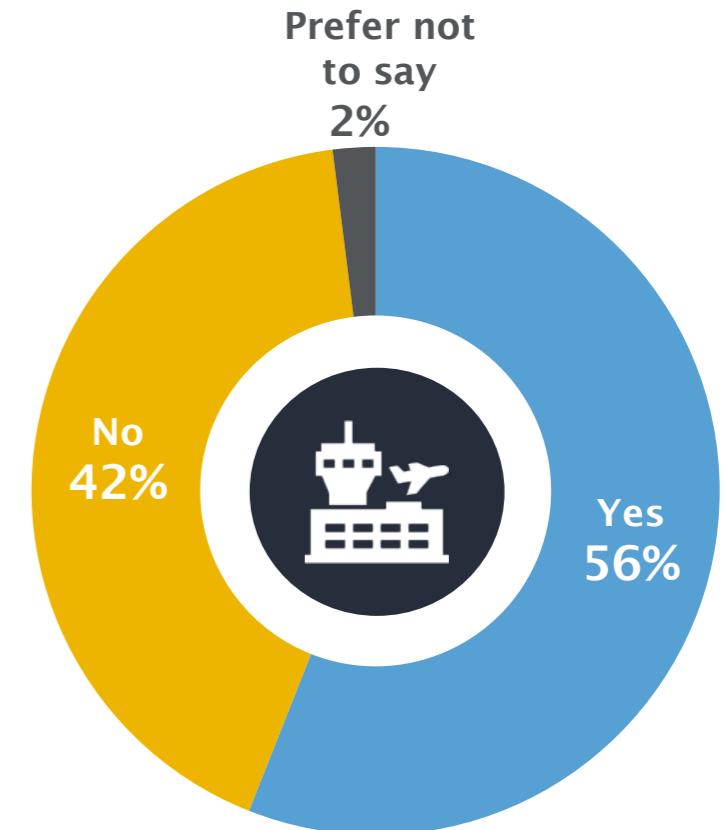
More than half of those with a disability/health condition find using airports or flying difficult

Of those who describe themselves as having a disability/health condition that limits their day-to-day activities (25% of all respondents), 56% say that they find accessing/using airports or flying difficult. This is in line with findings from the previous wave of research (57% in October 2018).

Disability/health condition *% who have a disability*



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



Q6. Do you have any disability or health condition that limits your day-to-day activities? It could include a physical disability or health condition (e.g. affecting your movement, balance, vision or hearing) or a non-physical disability or health condition (e.g. affecting thinking, remembering, learning, communications, mental health or social relationships). Base: All respondents (n=3500)

Q7. Does your disability or health condition make accessing and/or using airports or flying difficult?/ Would your disability or health condition make accessing and/or using airports or flying difficult? Base: All who have a disability (n=875)

More than two in five with a disability or health condition say that their disability/condition is physical, while around three in five say it is hidden

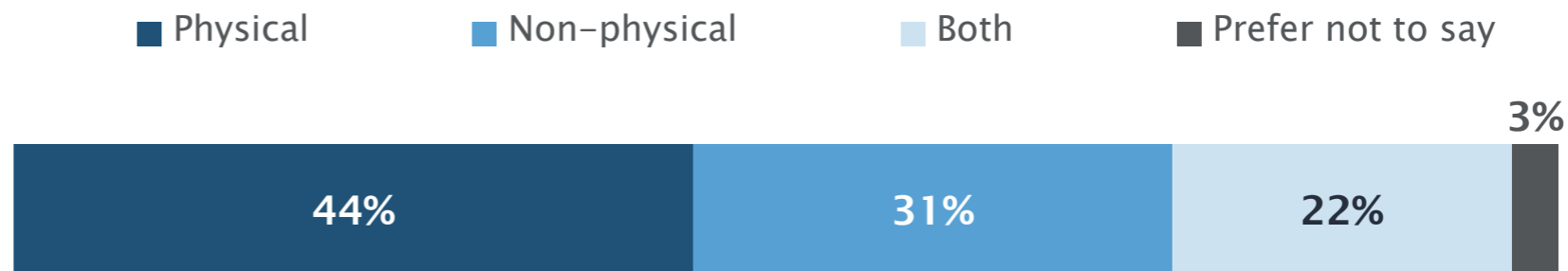
More than two fifths of those living with a disability say that their condition is physical (44%). Three in ten say it is non-physical (31%), while one in five (22%) say that it is both physical and non-physical.

Furthermore, the majority of disabled respondents say that their condition is hidden (57%), while a similar proportion of around one in five say that their condition is either non-hidden (19%) or both hidden and non-hidden (21%).



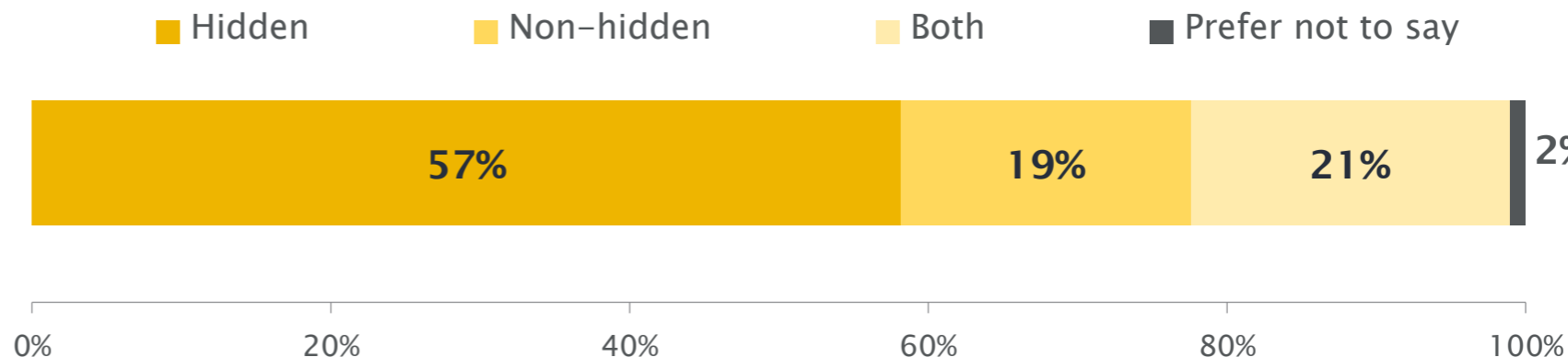
Physical or non-physical disability

All who have a disability (online only)



Hidden or non-hidden disability

All who have a disability (online only)



Q8. Would you classify your disability or health condition as physical, non-physical or both? By physical we mean something that affects your movement, balance, vision or hearing etc. By non-physical, we mean something that affects your thinking, remembering, learning, communication, mental health or social relationships. Base: All who have a disability, - online only (n=790)

Q9. The UK Aviation Regulator works to ensure that people with all kinds of disabilities receive the support they are entitled, including those with disabilities which could be described as 'hidden' as they are not outwardly visible. Would you consider your disability to be a hidden or a non-hidden disability? Base: All who have a disability - online only (n=790)



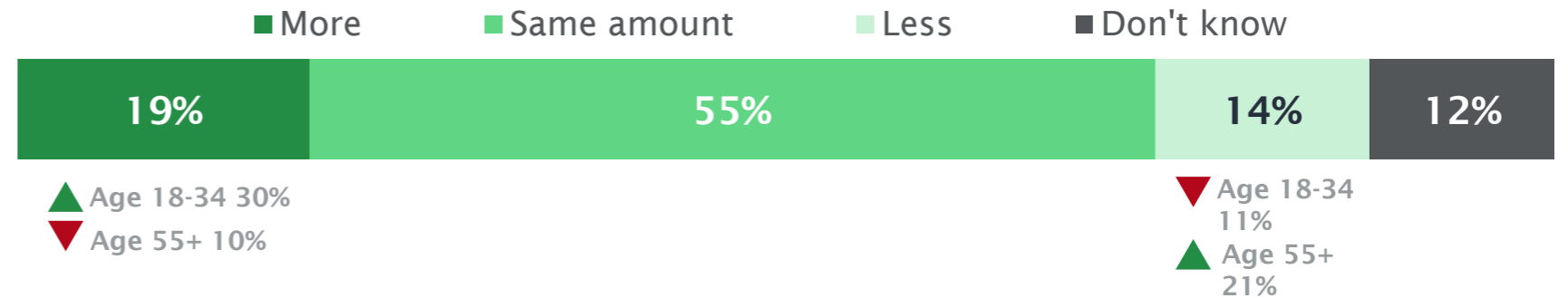
Disabled adults tend to expect to fly the same amount in the next 12 months as they did in the previous year

Although disabled adults tend to expect to fly around the same amount compared to the previous year, there have been some subtle shifts in expectations. More specifically, when comparing results to October 2018 they are slightly less likely to say they will fly more over the next year (19% April '19 vs. 23% October '18), and are slightly more likely to say that they will fly less (14% April '19 vs. 9% October '18). One in five (21%) disabled adults aged 55+ expect to fly less over the next 12 months.

Three in five (62%) disabled adults who find flying or using airports difficult say that they would need specific assistance from the airport or airline when making a flight, down from 72% in October 2018.

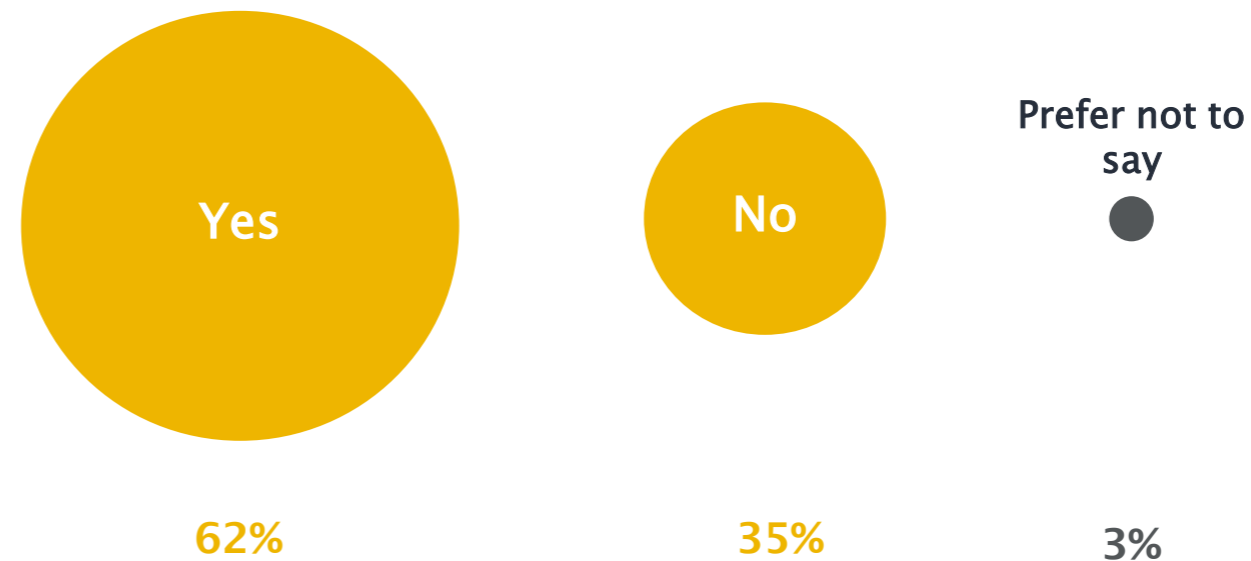
Expected flying behaviour (frequency) in next 12 months, as compared to previous year

All who have a disability



Assistance required

All who have a disability and find accessing/using airports and/or flying difficult



Q10. In the next 12 months, do you expect that you will fly more, the same amount or less compared to the number of times you have flown over the last 12 months? Please select one answer only Base: all who have a disability (n=875)
 Q11. Does your disability or health condition mean that you would need or think you would need specific assistance from the airport or airline when making a flight? Base: all those who have a disability and find accessing/using airports difficult and/or find flying difficult (n=495)

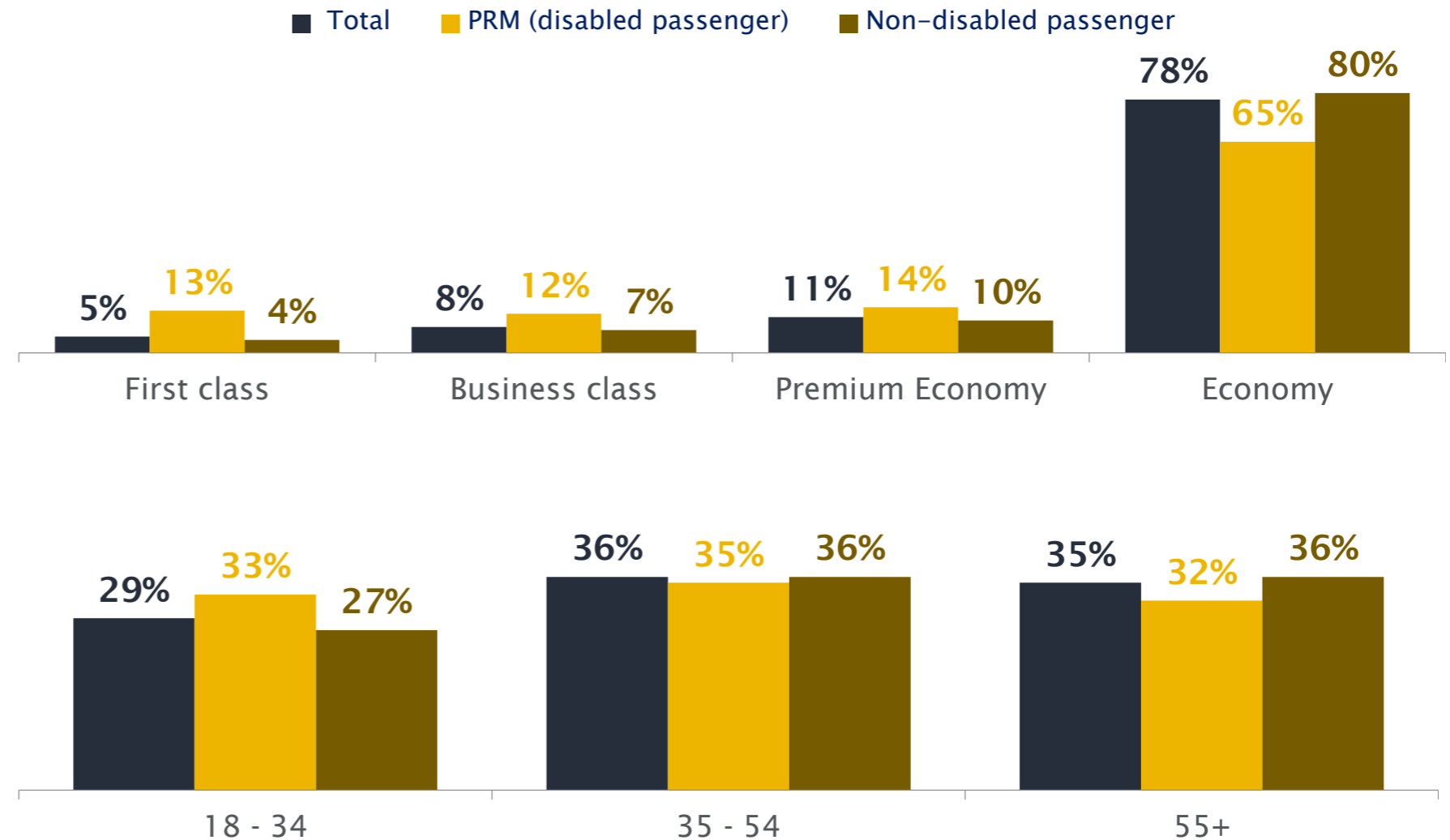


Disabled passengers are slightly more likely than average to travel first or business class, but most travel economy

Disabled passengers are about three times more likely to travel first class than non-disabled passengers (13% vs. 4%). They are also more likely to opt for travelling business class (12% vs. 7%).

However, disabled passengers – just like non-disabled passengers – are most likely to travel economy class, although the proportion of disabled passengers travelling this way is significantly lower (65% disabled vs. 80% non-disabled).

Disabled passengers compared to non-disabled passengers: across ages and cabin class flown



QD2. Age Base: All respondents (n=3500) Respondents with a disability (n=875)

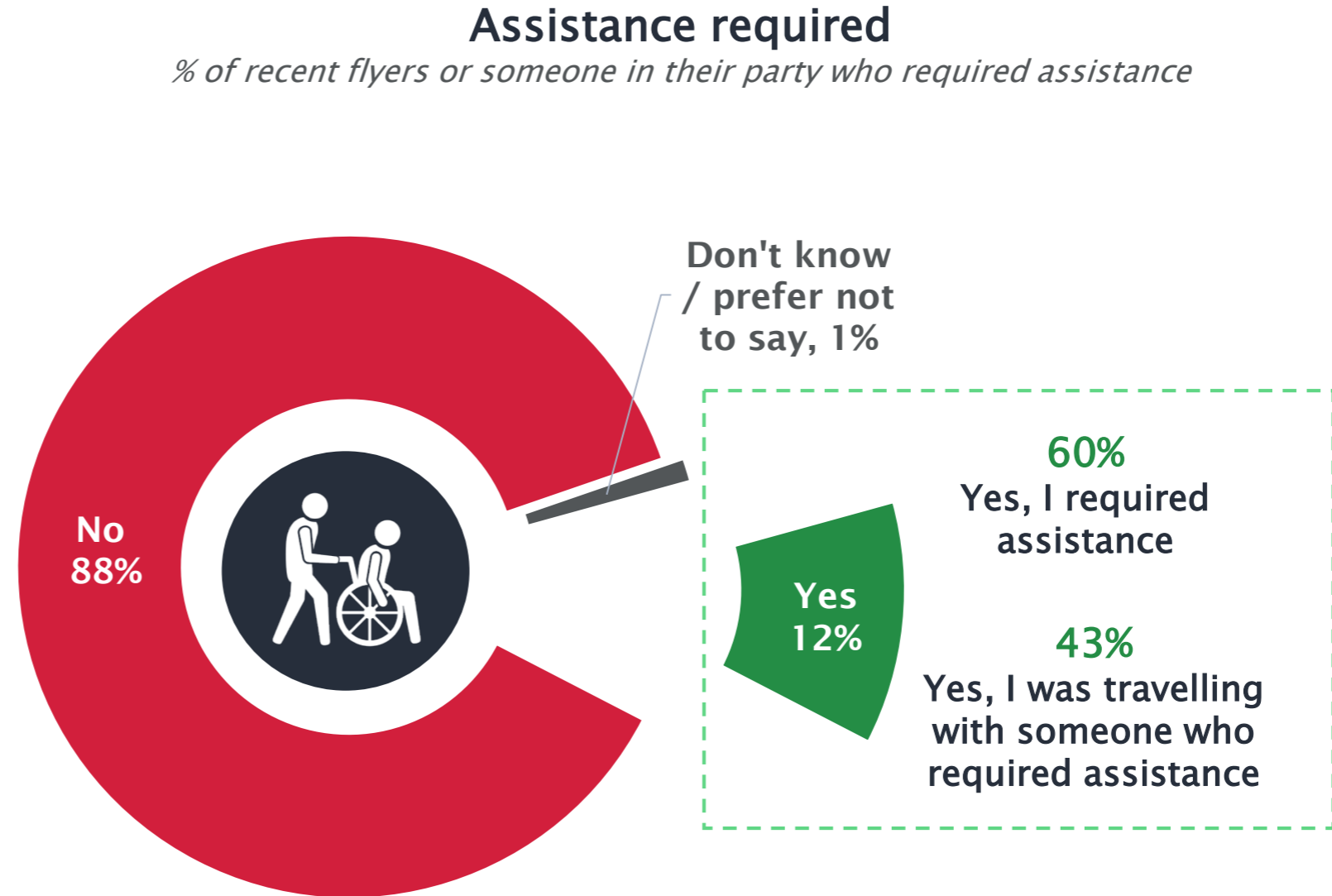
Q19. Which cabin class did you travel in the last time you flew? (If you travelled in different classes for your outbound and return flight, please select all that apply) Base: All who have flown from a UK airport in the last 12 months (n=1812) All who have flown in the last 12 months and have a disability (n=319) All who have flown in the last 12 months and don't have a disability (n=1470)



Nine in ten recent flyers did not require special assistance on their most recent flight – either for themselves nor for someone else

In line with previous findings, the majority of recent flyers did not require any special assistance on their most recent trip (88% vs. 87% in Spring 2018), while around one in ten (12%) say otherwise.

Of those who say they did require special assistance, three in five (60%) say they required it for themselves, while 43% required it for someone in their party.



Q21. 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? Please continue to think about both the outward and return flight. Base: All who have flown in the last 12 months (n=1812)
Base: All who have flown in the last 12 months, excluding 'No' and 'Don't know/prefer not to say' responses (n=213)



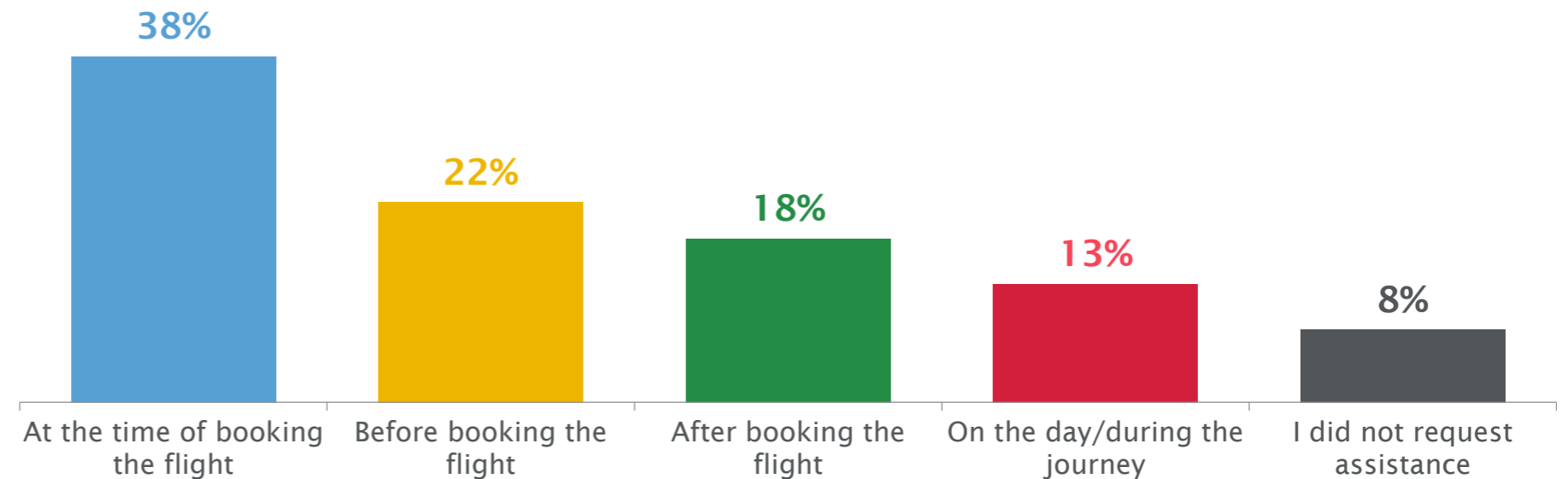
Assistance was most likely to be requested at the time of booking the flight, while only a minority made a request on the day or during the journey

As in the previous wave of research, the majority of recent flyers who required assistance either for themselves or for someone else requested it before the journey itself.

Respondents are most likely to say that they requested assistance at the time of booking their flight (38%), followed by those who did so before booking the flight (22%).

Point during booking process when assistance was requested

All who have flown in the last 12 months and required assistance





Those who requested assistance on their last trip are most likely to have done so for the first time on that occasion

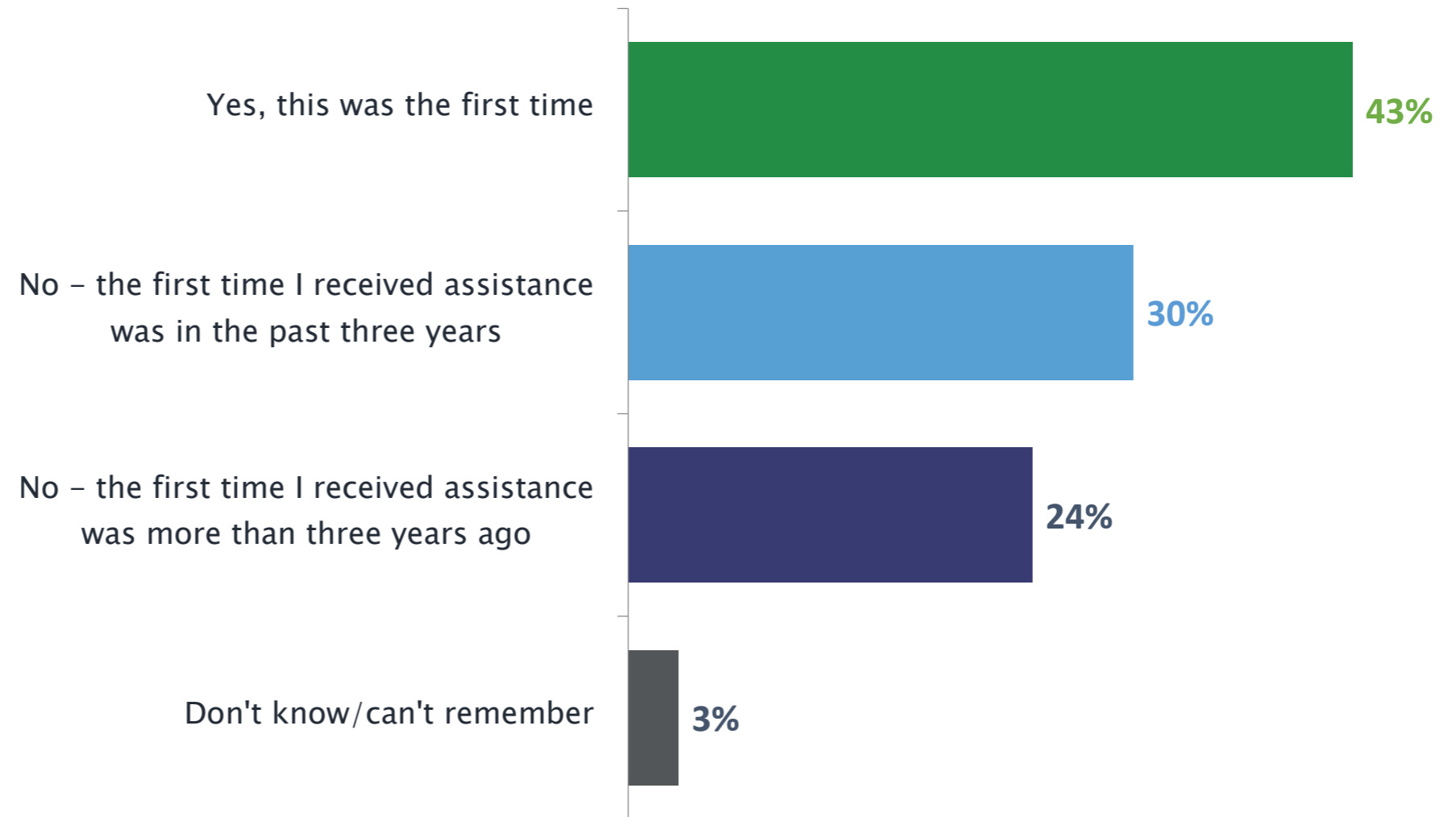
For three in five (43%) of those who requested assistance on their last trip it was their first time doing so.

Following this, three in ten (30%) say they had received assistance before in the past three years, while a quarter (24%) had received assistance more than three years ago.

This suggests that asking for assistance is still a relatively new process for a significant proportion of passengers, thus clear communication on these services is crucial from airlines/airports.

Was this the first time you had ever requested assistance when flying from a UK airport?

All those who have flown in the last 12 months, required assistance and requested it



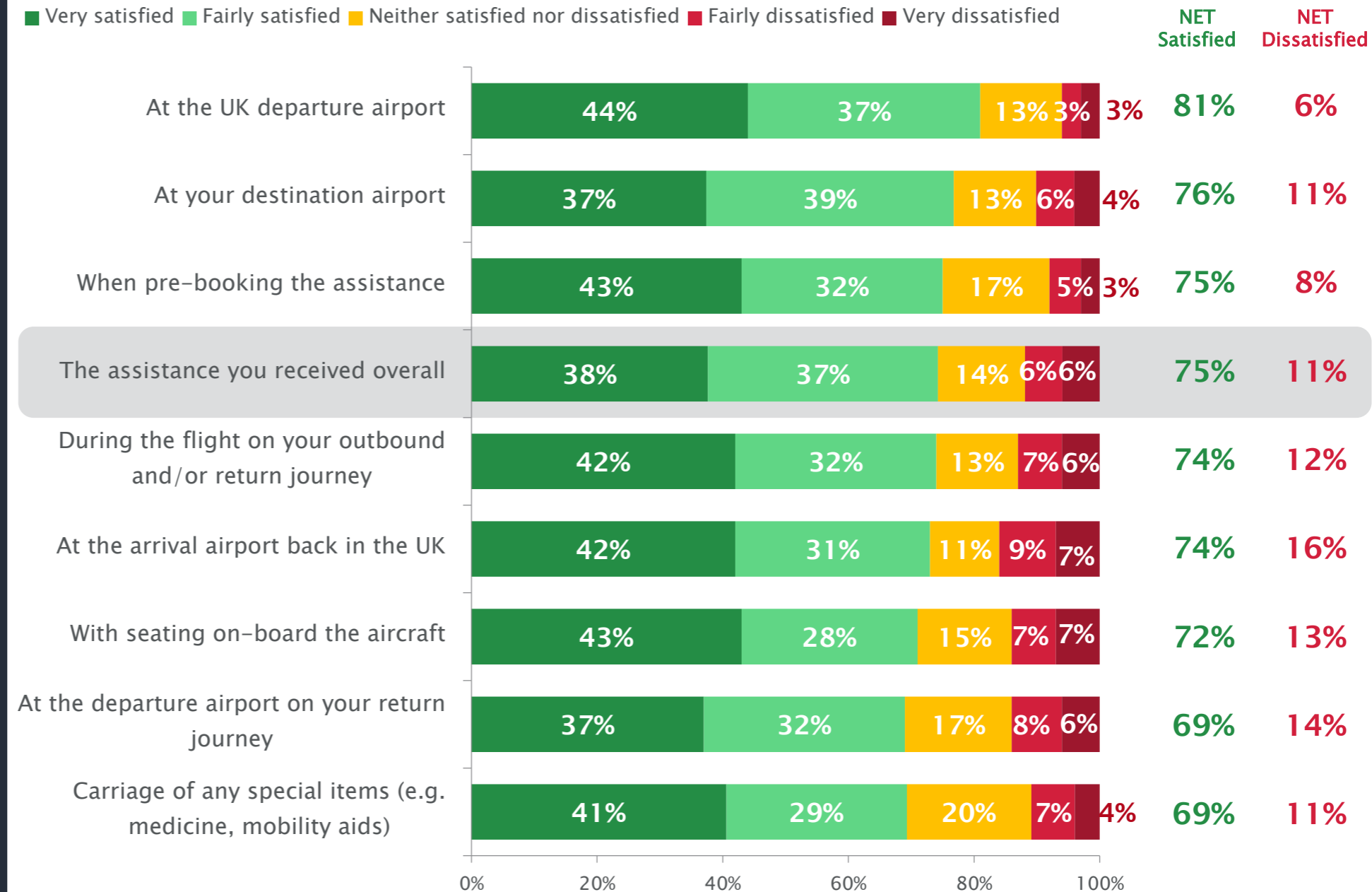
Among those who received it, satisfaction with each aspect of the assistance provided is relatively high

In line with previous findings, recent flyers are far more likely to be satisfied than dissatisfied with each aspect of assistance tested at any point of their journey. Moreover, three quarters (75%) say they were satisfied with the assistance they received overall.

However, levels of satisfaction have decreased compared to Autumn 2018, particularly with regards to the assistance at the departure airport on their return journey (69% vs. 81% October '18), the carriage of any special items (69% vs. 78% respectively), pre-booking assistance (75% vs. 85%) and the seating on-board the aircraft (72% vs. 81%).

Satisfaction with the services received at each point of the journey

All who have flown in the last 12 months and received assistance for their last journey, excluding 'Don't know' and 'Not applicable' responses

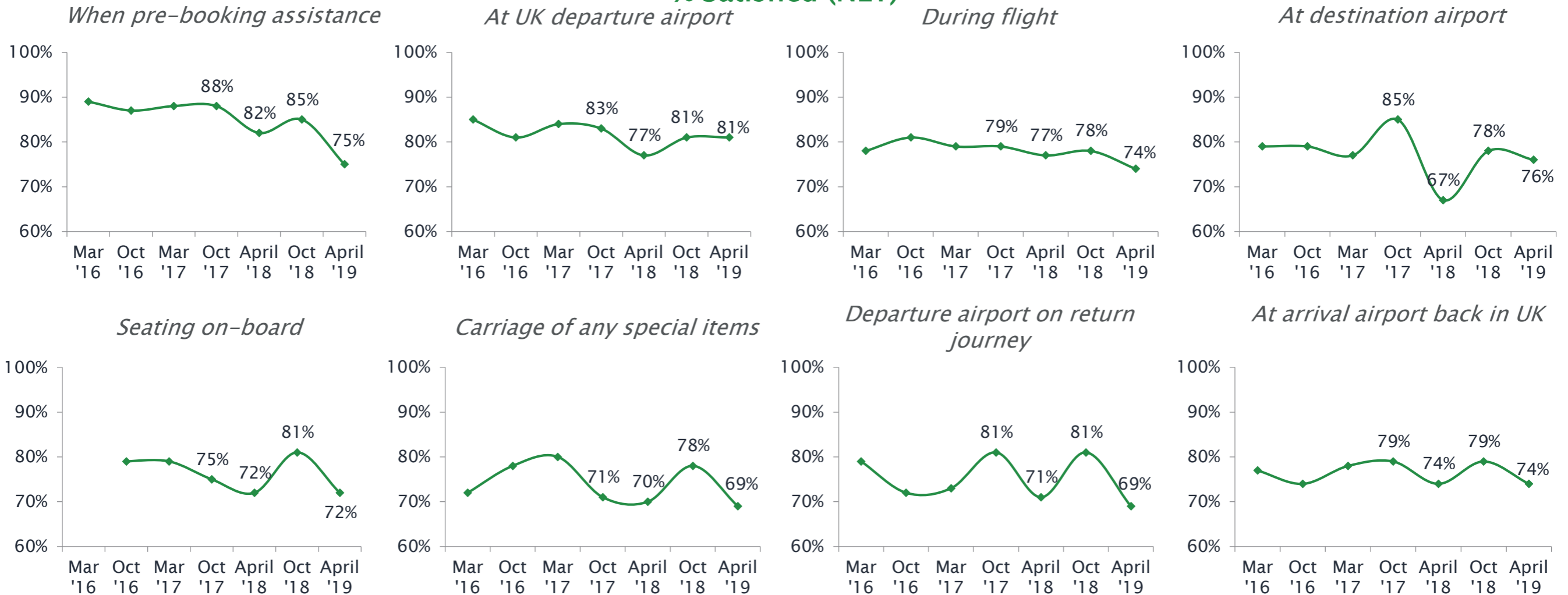


Satisfaction levels tend to have decreased compared to the previous wave; this is particularly noticeable regarding pre-booking assistance which had previously been the area consumers were most likely to be satisfied with



Satisfaction with the services received at each point in the journey – Tracking

% Satisfied (NET)



Q31. How satisfied or dissatisfied were you with the service you received at each of these points in the journey? Base: All who have flown in the last 12 months and requested assistance (excluding DK and NA responses) (n=151-193)



Poor customer care or lack of consideration for the needs of wheelchair users / those with mobility issues is the most common reason for why disabled passengers were dissatisfied with the assistance they received

Reasons for being dissatisfied with the assistance received

All disabled passengers who were dissatisfied with the assistance they received overall

“The system of providing wheelchairs is not designed for the convenience of the clients – it is for the providers. I would be happy to pay for this service if it worked for my convenience; but being dumped at various holding areas en route often for long periods is not acceptable when one is helpless to do anything about it.”

“Two operatives turned up to manage four wheelchairs – people treated as commodities and left waiting without being told what was happening; worry about delay getting to connecting flight; having to send for supervisor to insist that I was not left sitting in a wheelchair in the middle of an empty corridor.”

“Because I had an aisle seat and they wanted to put me to half way down the plane and aisle are very narrow and I got bruised all the time with people and trolleys banging into me.”

Q32 percentages are not shown because of a low base size.

Q32. Why were you dissatisfied with the assistance you received overall? Base: All those who were dissatisfied with overall assistance (n=22)*

Those with a disability tend to have positive expectations of how their flying needs will be dealt with, and more so than in the previous wave

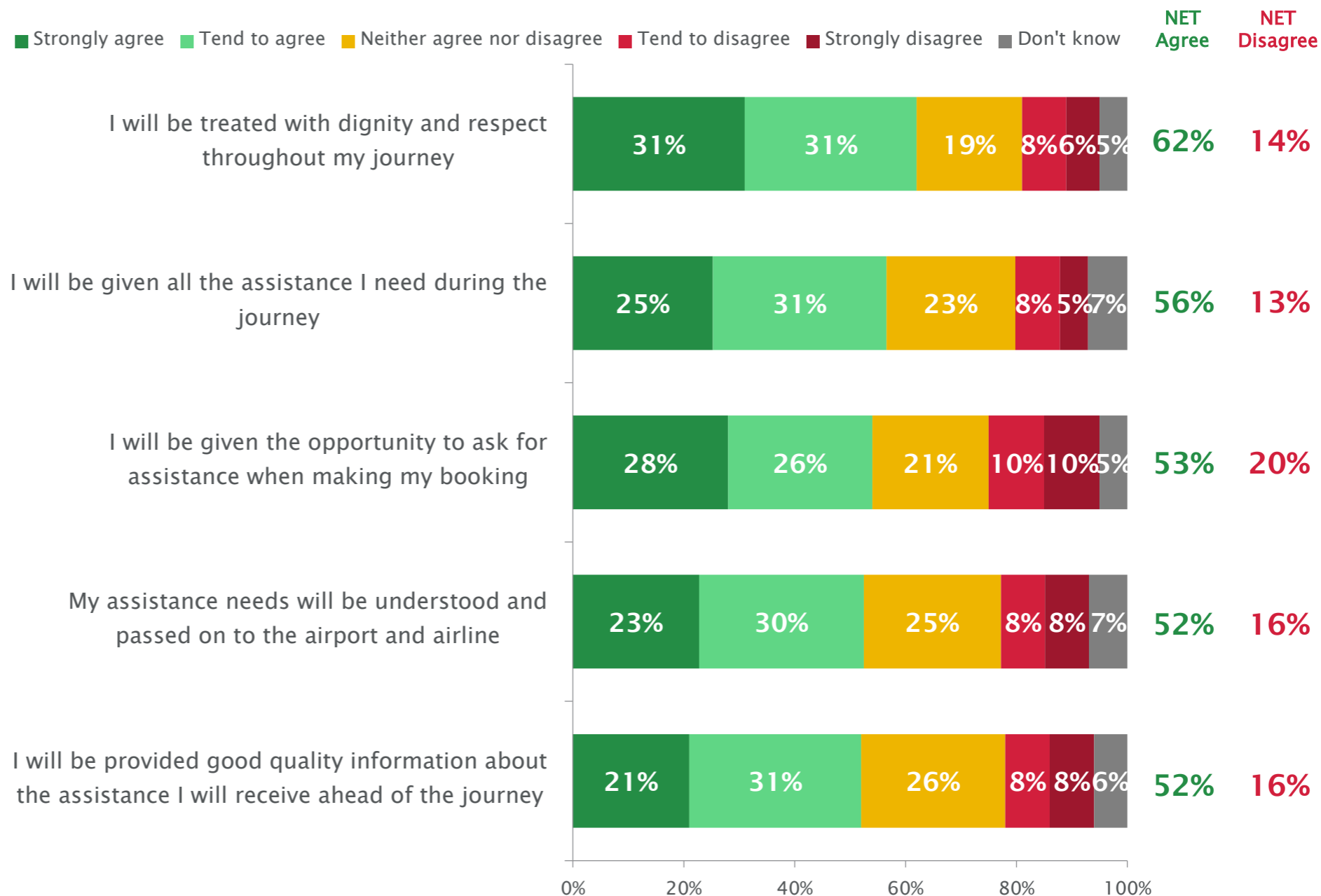
At least of half disabled passengers who have flown in the last four years agree with each statement tested, with three in five agreeing that they will be treated with dignity and respect throughout their journey (62%).

There has been some improvement in expectations since October 2018, most notably in the proportion who expect they will be given the opportunity to ask for assistance when making their booking (53% vs, 39% October '18).


On some issues, older passengers with a disability or health condition are more likely than their younger counterparts to have positive expectations. In particular, they are more likely to agree that they will be treated with dignity and respect (70% 55+ vs. 55% 18-34) or that they will be given the opportunity to ask for assistance when making their booking (61% vs. 48% respectively).

Expectations among PRMs for service when flying

All who have a disability and have flown in the last 4 years



Q39. 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 4 years (n=492)



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